

India Epichlorohydrin Market Assessment, By Application [Epoxy Resin, Water Treatment, Pharmaceuticals, Textile, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

India epichlorohydrin market is projected to witness a CAGR of 9.72% during the forecast period FY2026-FY2033, growing from USD 131.65 million in FY2025 to USD 276.50 million in FY2033F driven by its rising applications in epoxy resins, pharmaceuticals, and water treatment chemicals. In addition, advancements in domestic production technologies, such as sustainable glycerin-based technologies, are reducing import dependency and enhancing supply chain efficiency. Evolving environmental regulations are encouraging the adoption of eco-friendly practices in the manufacturing processes. Furthermore, robust infrastructure development in the country leads to increased demand for paints and coatings, where epoxy resins are becoming increasingly popular.

India epichlorohydrin market is being driven by the increased capital investment in infrastructure projects by the Indian government, particularly urban development, highways, and bridges. The government's emphasis on large-scale infrastructure development, with an interim budget allocation of USD 133.86 billion in 2024-25, increased by 11.1% since last year, which was approximately 3.4% of GDP.

Water Treatment Chemicals Market Supporting Epichlorohydrin Growth

The water treatment chemicals industry is emerging as a crucial driver for the India epichlorohydrin market. Epichlorohydrin is extensively used to produce ion-exchange resins and flocculants, which are essential components in water purification processes. With India's growing population and urbanization, there is an increasing need for clean drinking water and efficient wastewater management systems. Government initiatives to improve water infrastructure and quality standards have further amplified this demand. Ion-exchange resins derived from epichlorohydrin are pivotal in removing impurities such as heavy metals and salts from water, ensuring safe consumption and industrial usage. Additionally, epichlorohydrin-based chemicals are vital for treating wastewater generated by industries like textiles and manufacturing. As environmental regulations become stricter and awareness about water conservation grows, adopting advanced water treatment solutions will drive the demand for epichlorohydrin in this

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sector.

In November 2024, Epigral Limited (Epigral), India's leading integrated chemical manufacturer, approved an expansion project for its CPVC and Epichlorohydrin (ECH) facilities, aiming to increase their capacity to 1,50,000 TPA and 1,00,000 TPA, respectively. This expansion will elevate Epigral's total CPVC resin capacity to the world's largest and India's largest ECH facility. The additional capacities are expected to be commissioned by H1 of FY2027. The company's epoxy resins are used in pharmaceuticals, water treatment, paper chemicals, and textile auxiliaries.

Pharmaceutical Industry Boosting Epichlorohydrin Demand

The pharmaceutical industry is a significant contributor to the growth of the India epichlorohydrin market due to its use as an intermediate in synthesizing active pharmaceutical ingredients (APIs) and specialty compounds. Epichlorohydrin's chemical properties make it ideal for producing compounds that are used in drug formulations, particularly in antibiotics and other essential medicines. The expanding healthcare sector in India, driven by increasing investments in medical infrastructure and rising demand for affordable medicines, has created a robust market for pharmaceutical-grade chemicals. Furthermore, advancements in drug development processes have led to higher utilization of epichlorohydrin-based intermediates for creating innovative therapeutic solutions. The Indian government's focus on boosting domestic pharmaceutical production under initiatives like "Make in India" further supports this growth trajectory. As the pharmaceutical industry continues to expand its footprint both locally and globally, the demand for epichlorohydrin will remain strong within this critical application area.

In June 2022, Epigral Limited (Meghmani Finechem Ltd.) commissioned a 50,000-ton epichlorohydrin (ECH) plant in Dahej, Gujarat, despite a challenging external environment. The project, estimated at USD 32 million, will become India's first company to produce ECH, which is currently a fully imported product. The new plant aimed to reduce import dependence for consuming industries such as epoxy resin and pharmaceuticals.

Epoxy Resin is the Largest Application of Epichlorohydrin

Epoxy resins find numerous applications across many industries, such as construction, where these resins are utilized for high-traffic flooring and structural reinforcement due to their durability and corrosive resistance. Epichlorohydrin is crucial for producing epoxy resins, which are utilized in paints, coatings, adhesives, and composites due to their excellent durability and corrosion resistance. Beyond epoxy resins, epichlorohydrin also plays a significant role in the pharmaceutical industry, where it serves as an intermediate in synthesizing active pharmaceutical ingredients (APIs) and other specialized compounds. Additionally, it is used to produce water treatment chemicals, such as flocculants and ion-exchange resins, which are essential for efficient water purification processes.

In addition, the electronics sector also depends on epoxy resins to encapsulate electronic parts and shield them from environmental factors. In addition, the renewable energy sector, especially the wind energy sector, employs epoxy resins to produce wind turbine blades and other hardware. Thus, the increasing demand for epoxy resins in these sectors is propelling the Indian market, as these resins possess enhanced mechanical properties and adaptable nature.

In February 2024, DCM Shriram Ltd approved its Chemicals business' entry into the Advanced Materials sector, planning to invest USD 118 million in a greenfield epoxy manufacturing plant. The company's Epichlorohydrin (ECH) plant in Gujarat is in the final stages of completion and is expected to be commissioned in Q1 2024-25. The company is confident about the prospects of its Chemicals business and its entry into the Advanced Materials space, as the company's portfolio of Advanced Materials products is expected to find increasing applications in various industries.

Imposition of Anti-Dumping Duties on Epichlorohydrin Imports

The imposition of anti-dumping duties on epichlorohydrin imports has significantly impacted the Indian market by protecting domestic manufacturers from low-cost imports. This measure aims to address the adverse effects of dumping practices, which have hindered the growth of the domestic industry by undercutting local prices. By imposing duties, the government ensures a fair-trade environment, allowing Indian producers to compete more effectively in the market. This move supports the development of a robust domestic epichlorohydrin industry, which is crucial for producing epoxy resins used in various sectors such as construction, automotive, and electronics. The duties also encourage investment in local manufacturing, fostering a sustainable and competitive industrial base. As a result, the domestic epichlorohydrin market is poised for steady growth, driven by increased demand for high-performance materials and a more stable supply chain. This strategic protectionism aligns with broader economic policies aimed at bolstering India's manufacturing sector.

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In November 2024, India imposed a five-year anti-dumping duty of up to USD 557 per ton on epichlorohydrin imports from China, Korea, and Thailand to protect domestic industries from cheap imports. Epichlorohydrin is used to produce glycerol, elastomers, adhesives, resins, paints, and lacquers. The Department of Revenue acted on recommendations from the Directorate General of Trade Remedies.

Future Market Scenario (FY2026-FY20233F)

- Automotive and construction sectors are witnessing robust growth in India, which is deriving the demand for epoxy resins significantly. These resins find application in coatings, adhesives, and composites due to their toughness and corrosion resistance.
- The establishment of epichlorohydrin manufacturing facilities, such as Meghmani Finechem's, increases supply chain effectiveness and reduces reliance on imports. It assists in the growth of the domestic market by providing a stable, high-quality source of epichlorohydrin.
- Epichlorohydrin is used in the production of water treatment chemicals, aiding in expanding its market. Therefore, increasing demand for effective water treatment systems in India because of environmental consciousness and regulations.
- Ongoing infrastructure projects, including roads, bridges, and buildings, require epoxy-based materials for their construction and maintenance. This demand is expected to continue as India invests heavily in infrastructure development.

Key Players Landscape and Outlook

In the Indian epichlorohydrin market, key players are focused on expanding their production capacities and optimizing supply chains to meet growing demand from various sectors. These companies are investing in technological advancements to improve efficiency and reduce environmental impact. The establishment of new manufacturing facilities, such as the recent plant in Gujarat, highlights the commitment to domestic production and reducing import dependency. Additionally, these players are exploring strategic partnerships and collaborations to enhance their market presence and cater to emerging applications in industries like water treatment and automotive. Despite challenges related to feedstock availability and regulatory compliance, Indian manufacturers are poised to capitalize on the country's infrastructure growth and increasing demand for epoxy resins and other downstream products.

In March 2022, the global chemical manufacturer Grasim Industries plans to commission chemical plants with a capacity of 439 Kilo Tons Per Annum (KTPA) over the next three years. The plants include BB Puram in Andhra Pradesh, adding 73 KTPA in Q3-FY2023, the Vilayat plant in Gujarat, an epoxy expansion plant in Q1 of FY2024, and the epichlorohydrin (ECH) project in Q1 of FY2025. The company's epoxy products include basic products like liquid epoxy resins and value-added products like formulated resins, reactive diluents, and hardeners.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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