

India Caustic Soda Market Assessment, By Production Process [Membrane Cell, Diaphragm Cell, Others], By Type [Flakes, Lye], By Application [Textile, Pulp and Paper, Alumina, Soap and Detergents, Water Treatment, Chemical Production, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

Indian caustic soda market is expected to grow at a CAGR of 4.56% during the forecast period FY2026-FY2033. The market size will grow from USD 3.55 billion in FY2025 to USD 5.07 billion in FY2033. The caustic soda market in India is propelled by its significance in the various industries such as textiles, pulp and paper, water treatment and chemicals. Caustic soda, or sodium hydroxide, is essential for numerous applications, including the production of soaps, detergents, and aluminum. One of the major factors which is driving the caustic soda market is the increasing demand from the textile industry, where it is used in processes like mercerization to enhance fabric quality.

Alumina is another significant factor which is contributing to the caustic soda market. Caustic soda is the essential raw material for the production of alumina, which will be further utilized in the production of aluminum. The rising demand for water treatment chemicals and chemicals industry is further boosting up the demand of caustic soda in the India market. The versatile application of the caustic soda is fueling up the demand. Overall, these diverse applications underscore the importance of caustic soda in supporting India's industrial development.

Rising Demand from the Aluminum Industry for Caustic Soda Driving the Growth in India

Caustic soda is the critical input for extracting the alumina from the bauxite ore, which is then used for aluminum production. The increasing demand of aluminum driven by the construction and automotive industries, directly boost the caustic soda consumption. As the demand of aluminum is increasing in India, the demand for caustic soda is set to rise proportionally. This is because of government policies focusing on increasing domestic manufacturing capacity in most sectors, including the metals sector. Aluminum output is increasing as more uses in the automotive, construction, and aerospace sectors emerge. As these sectors grow, so does the demand for light materials like aluminum, which in turn drives the demand for caustic soda. The

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emphasis on sustainable operations and energy efficiency in aluminum production highlights the role of caustic soda in facilitating these advancements. In general, the link between the expansion of the aluminum sector and the critical role of caustic soda in its production processes makes caustic soda a key component of India's industrial development strategy. For instance, in January 2024, Gujarat Alkalies and Chemicals Ltd and Vedanta Aluminum signed a memorandum of understanding (MoU) for the business opportunities within the caustic chlorine and related sectors.

Textile Industry Driving the Market Growth for Caustic Soda in India

Indian caustic soda industry is growing hugely with major contributions coming from the textile industry. Caustic soda is crucial in numerous processes involved in the manufacturing of textiles. Scouring with caustic soda is done in order to make raw fibers more absorbent and prepared to be colored. When cotton fibers are mercerized with high-strength caustic soda, the textiles' tensile strength, gloss, and ability to receive dyes are enhanced, increasing their appeal to consumers. Additionally, caustic soda is used in dyeing to maintain the pH at ideal values for vibrant, long-lasting colors.

Caustic soda is also critical during the manufacture of quality textiles in the Indian textile industry, which is highly dominant in the economy of India. Since the industry has been quality and environment conscious, additional demand for caustic soda is employed in operations that improve the quality of the textiles and support environmentally friendly operations. Caustic soda also helps the Indian denim industry to produce high-quality denim textiles through the desizing and finishing processes.

For instance, in September 2024, Tamil Nadu Petroproducts Ltd. (TPL) announced its planning for the commissioning of capacities expansion of its Linear Alkyl Benzene (LAB) and Caustic Soda plants at a cost of around USD 48 million during FY2026. The LAB plant capacity is being increased from 120 tons per annum to 145 tons per annum. TPL committed around USD 20 million towards designing engineering and ordering plant and machinery. The Caustic Soda plant will be modernized and expanded, costing around USD 20 million, leading to an increase in production volume from 150 tons per day to 250 tons per day, dedicated for textile, pulp & paper, aluminum, and soaps and detergents.

Caustic Soda Flakes are Witnessing the Robust Growth in India

In India the caustic soda flakes are witnessing strong growth due to growing demand from major industries. Indian caustic soda market, including flakes, is backed by its diversified applications in textiles, pulp and paper, and chemicals industries. The textile industry, in fact, depends on caustic soda for mercerization, which improves the quality of the fabric and dye affinity, and thus is a major growth driver for the market. Market expansion of caustic soda is also driven by increasing industrialization and the development of India as a chemical production hub. The demand for caustic soda flakes is also increased by applications in water treatment and metallurgy, including the production of aluminum. Increased adoption of environmentally friendly processes and environmental regulations drive the adoption of caustic soda in green applications, also likely to propel market growth further. For instance, in April 2024, Mundra Petrochemicals Limited commissioned Nuberg EPC to set up a 2,200 tons per day chlor-alkali project in Gujarat. The project aims to produce essential chemicals like 50% Caustic Soda, Caustic Flakes, Anhydrous HCl, and liquid chlorine, as well as other by-products.

West and Central Region in India Witnessing the Fastest Growth in Caustic Soda Demand

India's West and Central regions are witnessing healthy growth in the caustic soda market due to healthy industrial activity as well as strategic merits. Maharashtra and Gujarat states have become the leading player owing to its strong textile, detergent, soap, paper, and pulp industries which all use heavy doses of caustic soda. The long coastline of the region and the major ports of Mundra and Mumbai allow for smooth import and export activities, lowering transport costs and offering logistical benefits. Additionally, government policies for encouraging industrial growth through tax advantages and infrastructure development have consolidated West India's presence in the market.

In the Central region, Madhya Pradesh and other states are seeing growth due to growing industrial activity and investment in chemical manufacturing. Less dominant than West India, the Central region enjoys the benefit of location and growing demand from domestic industry. Both regions in general are poised to keep growing based on their industrial prowess and favorable business environments. The intersection of these factors points to Central and West India's role in driving the caustic soda market forward.

For instance, in April 2024, Kutch Chemical Industries Limited (KCIL) announced for expanding its caustic soda facility in Gujarat, India, to add an additional capacity of 670 tons per annum. The project, estimated to cost around USD 89 million, will be funded entirely through internal accruals. This investment aims to strengthen Kutch Chemical Industries Limited' market position and

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meet growing demand for basic chemicals in the region and internal demand.

Future Market Scenario (FY2026 - FY2033F)

-□The ongoing industrial growth across various sectors will drive higher demand for caustic soda as industries expand their operations.

-□A growing emphasis on sustainable practices within manufacturing processes will lead industries to adopt eco-friendly alternatives that include caustic soda.

-□Increased awareness about hygiene will continue to boost demand for soaps and detergents, thereby elevating need for caustic soda.

-□Expanding applications of caustic soda in new industries such as pharmaceuticals will further enhance its market prospects.

Key Players Landscape and Outlook

The major players in the Indian caustic soda market are positioning themselves strategically to increase their production capacity and invest heavily in research and development to create new and innovative applications for their products. These players concentrate on sustainability through the use of green production methods that minimize waste creation and energy usage during their production cycles. Collaborative alliances with other industry players are common as they seek to diversify their product offerings while improving supply chain efficiencies through knowledge exchange and resources. Additionally, the capability to remain compliant with regulatory needs enables these players to service national and international market demand efficiently. A strategic focus on innovation together with sustainability positions these players well within India's vibrant chemical market, enabling them to capitalize on new opportunities in this key market space. Companies are expanding to meet the growing demand of caustic soda. For instance, in March 2025, DCM Shriram Ltd commissioned a new 300 tons per day caustic soda flakes plant in Jhagadia, Gujarat complex. The company total caustic soda capacity has increased to 900 tons per day.

Table of Contents:

- 1.□Project Scope and Definitions
- 2.□Research Methodology
- 3.□Impact of US Tariffs
- 4.□Executive Summary
- 5.□Voice of Customer
 - 5.1.□Factors Considered in Purchase Decisions
 - 5.1.1.□Purity and Quality
 - 5.1.2.□Pricing
 - 5.1.3.□Supplier Reliability
 - 5.1.4.□Compliance and Regulatory Standards
- 6.□India Caustic Soda Market Outlook, FY2019-FY2033F
 - 6.1.□Market Size Analysis & Forecast
 - 6.1.1.□By Value
 - 6.1.2.□By Volume
 - 6.2.□Market Share Analysis & Forecast
 - 6.2.1.□By Production Process
 - 6.2.1.1.□Membrane Cell
 - 6.2.1.2.□Diaphragm Cell
 - 6.2.1.3.□Others
 - 6.2.2.□By Type
 - 6.2.2.1.□Flakes
 - 6.2.2.2.□Lye
 - 6.2.3.□By Application
 - 6.2.3.1.□Textile
 - 6.2.3.2.□Pulp and Paper

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- 6.2.3.3.□Alumina
- 6.2.3.4.□Soap and Detergents
- 6.2.3.5.□Water Treatment
- 6.2.3.6.□Chemical Production
- 6.2.3.7.□Others
- 6.2.4.□By Region
- 6.2.4.1.□East
- 6.2.4.2.□West and Central
- 6.2.4.3.□North
- 6.2.4.4.□South
- 6.2.5.□By Company Market Share Analysis (Top 5 Companies and Others - By Value, FY2025)
- 6.3.□Market Map Analysis, FY2025
- 6.3.1.□By Production Process
- 6.3.2.□By Type
- 6.3.3.□By Application
- 6.3.4.□By Region
- 7.□Demand Supply Analysis
- 8.□Import and Export Analysis
- 9.□Value Chain Analysis
- 10.□Porter's Five Forces Analysis
- 11.□PESTLE Analysis
- 12.□Pricing Analysis
- 13.□Market Dynamics
- 13.1.□Market Drivers
- 13.2.□Market Challenges
- 14.□Market Trends and Developments
- 15.□Case Studies
- 16.□Competitive Landscape
- 16.1.□Competition Matrix of Top 5 Market Leaders
- 16.2.□SWOT Analysis for Top 5 Players
- 16.3.□Key Players Landscape for Top 10 Market Players
- 16.3.1.□Chemfab Alkalies Ltd
- 16.3.1.1.□Company Details
- 16.3.1.2.□Key Management Personnel
- 16.3.1.3.□Products and Services
- 16.3.1.4.□Financials (As Reported)
- 16.3.1.5.□Key Market Focus and Geographical Presence
- 16.3.1.6.□Recent Developments/Collaborations/Partnerships/Mergers and Acquisition
- 16.3.2.□Kutch Chemical Industries Limited
- 16.3.3.□Mundra Petrochemicals (Adani Group)
- 16.3.4.□Tamil Nadu Petroproducts Ltd.
- 16.3.5.□Gujarat Alkalies and Chemicals Ltd
- 16.3.6.□DCM Shriram Ltd.
- 16.3.7.□Atul Ltd
- 16.3.8.□Tata Chemicals Ltd.
- 16.3.9.□Gujarat Fluorochemicals Limited
- 16.3.10.□Chemplast Sanmar Limited

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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.

17. Strategic Recommendations

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