

India Dyes and Pigments Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

Market Report | 2025-08-13 | 142 pages | EMR Inc.

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Report description:

The India dyes and pigments market attained a value of USD 65.71 Billion in 2024 . The market is further expected to grow in the forecast period of 2025-2034 at a CAGR of 4.50% to reach USD 102.05 Billion by 2034 .

India Dyes and Pigments Market Growth

Due to the rising demand for organic pigments, they are the dominant type of pigments being produced in India, accounting for 58% of the total pigment production in India. The India dyes and pigments market value is aided by the cosmetic industry growth in the country. Due to improving living standards and evolving lifestyles, the demand for cosmetic products such as skincare, haircare, and perfume is growing rapidly, giving the Indian cosmetics industry a high boost. The cosmetic industry is a major application sector for the pigments market.

The dye industry in India is expected to witness steady growth in the coming years due to environmental crackdowns in China, resulting in a shutdown of several domestic dye companies. India is better placed due to the availability of the ecosystem, feedstock, technology, and compliance required for the industry. Thus, the consumer base of China is likely to shift to India due to these reasons in the coming years.

India Dyes and Pigments Industry Analysis

The increasing demand for personal care products like cosmetics is driving the growth of the India dyes and pigments market. The rising demand for cosmetics and other personal care products is supporting the growth of the pigment industry. The increasing demand for unique effect pigments in personal care products is expected to drive the Indian market. The Indian beauty industry is growing rapidly due to globalisation and the introduction of multiple new brands in India, which is further driving the growth of the dyes and pigment industry in India.

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Key Trends and Developments

Emerging applications of dyes and pigments; growing preference for natural and biodegradable products; rising adoption of sustainable practices; and technological advancements are favouring the India dyes and pigments market expansion.

October 2024

Sudarshan Chemical entered into an agreement to acquire global pigment business operations of the Heubach Group for INR 1,180 crore. Post-acquisition, the company is expected to boast a comprehensive pigment portfolio of high-quality products and a strong presence in major economies in the Americas and Europe.

August 2024

Benninger introduced FabricMaster to revolutionise textile dyeing in India. The machine is designed to handle the most challenging dyeing tasks with ease and dyeing Rayon, Lycra blends of Cotton, Modal, and Nylon fabrics in open-width form. It also ensures optimal dye penetration and colour consistency to achieve uniform fabric handling during the dyeing process.

February 2024

Birla Cellulose unveiled Birla Viscose - Intellicolor, which uses Cationic or Basic dyes to revolutionise the dyeing process. The product boasts a dye exhaustion rate exceeding 95%, eliminates the need for salt and soda ash in the dyeing process, and streamlines operations while reducing environmental impact. It also offers superior colour vibrancy while using lower dye concentrations.

December 2023

Vipul Organics Limited announced the commencement of construction of its new plant at Sayakha, Gujarat. The plant, spread over a total area of 25,000 square meters and equipped with advanced technology and machinery, is aimed at producing pigments and pigment intermediaries as well as high-performance colours. Through the new facility, the company is expected to have one of the largest manufacturing capacities for pigments and colourants in India.

Emerging applications of dyes and pigments

Emerging applications of dyes and pigments in sectors like smart textiles and 3D printing are shaping the India dyes and pigments market trends and dynamics. While dyes and pigments that can change colour in response to environmental stimuli like moisture, temperature, and light are gaining popularity, 3D printing is surging the demand for durable and vibrant pigments that can be incorporated into 3D printing filaments.

Rising preference for natural and biodegradable dyes and pigments

Amid growing concerns regarding the presence of harmful chemicals in synthetic dyes and pigments, there is an increasing preference for natural and biodegradable dyes and pigments that are derived from minerals, plants, and insects and boast a smaller environmental footprint.

Growing adoption of sustainable practices

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Key players are increasingly adopting environmentally friendly extraction methods such as high-pressure homogenisation and ultrahigh pressure, pulsed electric fields, and supercritical fluid extraction to synthesise sustainable dyes and pigments. They are also focusing on the reuse of dye waste and pigment by-products and shifting towards zero-waste production processes to enhance the sustainability of dye and pigment production.

Technological advancements

With advancements in technology, there is a rising addition of nanoparticles in dyes and pigments to improve their visibility, colour, stability, fading resistance, and photocatalytic capabilities. In the forecast period, the increasing deployment of technologies such as artificial intelligence and automation to reduce labour costs in dye and pigment production and improve the consistency of dyes and pigments is anticipated to fuel the India dyes and pigments market growth.

India Dyes and Pigments Market Trends

The major factors driving the industry studied are the increasing demand from the paints and coatings industries. Paints and coatings account for a significant share of the market and are estimated to be one of the fastest-growing application sectors. Architectural and decorative coatings account for a major consumption of pigments. Thus, the rising construction and infrastructure activities in the country act as a significant driver for the market.

As per the India dyes and pigments market dynamics and trends, another factor driving the industry is the increasing purchasing power of the consumers and their changing lifestyle. Their interest in innovative and quality products is pushing the industry growth. With urbanisation, the competition among the major players is also growing. This has resulted in the availability of a variety of products in the market.

Recent Developments

Vipul Organics, a speciality chemical maker based in India, announced that it got an order worth 7.15 crore in March 2024 for the supply of blue and violet pigment dye to the Tamil Nadu Newsprint and Paper Ltd (TNPL) company. This offer is expected to boost its position as a renewed paper dye supplier in the Indian market for dyes and pigments.

Industry Outlook

Use of Dyes and Pigments in End Use Markets

The growth of the India dyes and pigments industry share is closely linked to the expansion of the construction industry which drives the demand for paints and coatings. In 2023, according to industry reports, Asian Paints led the market with a commanding 59% share, driven by its comprehensive product range, strong brand reputation, and extensive distribution network. This market dominance is a testament to the company's ability to innovate and meet consumer demands effectively, leveraging advanced dyes and pigments to enhance product quality and colour variety.

As per the dyes and pigments industry forecast in India, Berger Paints, holding an 18% market share, has also capitalized on the rising demand for high-quality paints in both residential and commercial construction projects. The company's strategic focus on eco-friendly and technologically advanced products aligns with the broader industry trend towards sustainable practices. Kansai Nerolac, with a 15% market share, has made significant inroads in the industrial and automotive segments, areas that require specialized and high-performance coatings. The use of advanced pigments in these applications is crucial for durability and aesthetic appeal, reflecting the company's strong research and development capabilities.

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AkzoNobel, with a 7% share, continues to leverage its global expertise and strong brand portfolio in dyes and pigments industry in India. The company's focus on premium and specialized paint products has helped it maintain a competitive position in the Indian market. The demand for premium paints in India is closely linked to the construction of high-end residential and commercial properties, where superior finish and durability are key considerations. The remaining 1% of the market is comprised of various smaller companies, which often compete on price and localized service offerings.

The increased demand for food-grade colorants, innovative packaging solutions, and compliance with regulatory standards underscores the critical role of dyes and pigments in supporting the food processing sector and boosts India dyes and pigments industry revenue.

The Indian processed food market size is expected to increase from USD 555.2 billion in 2020 to a projected USD 957.5 billion in 2024. This growth trajectory reflects a rising consumer demand, urbanisation, and changing dietary preferences. According to data from the Parliament Library and Reference, Research, Documentation And Information Service (LARRDIS), the significant Foreign Direct Investment (FDI) inflows into the Indian food processing sector are aiding the growth of the India dyes and pigments industry. In 2018-19, India's food processing sector received an FDI of USD 628.2 million. It increased significantly to USD 904.7 million in 2019-20 driven by favourable government policies and the sector's robust growth prospects. The COVID-19 pandemic however, led to a sharp decline in 2020-21, with inflows dropping to USD 393.4 million. The recovery to USD 410.6 million in 2021-22 indicates a gradual return of investor confidence as the market adapts to post-pandemic realities.

What Factors are Driving the Growth of the India Dye and Pigment Market?

- ? Dyes and pigments are used in various industries such as textiles, paints and coatings, plastics, paper, and printing inks, providing a broad customer base.
- ? India has a cost advantage due to lower labour costs, abundant raw material availability, and established manufacturing infrastructure, which aids India dyes and pigments demand forecast.
- ? India is home to numerous well-established manufacturers with advanced production capabilities and the ability to produce a wide range of dyes and pigments.
- ? Increasing investments in research and development enhance the ability to innovate and develop new and advanced products, catering to evolving customer needs.

What Challenges are Impacting the India Dyes and Pigments Market Share?

- ? Fluctuations in the prices of raw materials, such as petrochemicals, can impact production costs and profit margins.
- ? Intense competition from other major producers like China and South Korea can pose a threat to market share and pricing power.
- ? Economic downturns and fluctuations in major consumer markets can reduce demand for dyes and pigments, affecting sales and profitability as well as India dyes and pigments demand growth.
- ? Rapid technological changes and innovations can render existing products obsolete, requiring continuous investment in R&D to stay competitive.
- ? Changes in environmental regulations and trade policies in key markets can affect export potential and market dynamics.
- ? The production of dyes and pigments involves hazardous chemicals and generates significant waste, leading to environmental pollution and regulatory challenges.
- ? Inconsistent product quality and failure to meet international standards can hinder the market's growth and reputation.
- ? Dependence on imported raw materials for specific dyes and pigments can lead to supply chain vulnerabilities and increased production costs and affect the dyes and pigments share in India.
- ? The market is highly fragmented with numerous small and medium-sized players, leading to intense competition and price wars, impacting profitability.
- ? Stringent environmental regulations and compliance requirements can increase operational costs and affect production

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processes.

What are the Opportunities in the India Dyes and Pigments Market?

? Increasing demand for eco-friendly and sustainable dyes and pigments offers opportunities for manufacturers to develop and market green products.

? Adoption of advanced manufacturing technologies and automation can improve product quality, reduce production costs, enhance competitiveness and boost India dyes and pigments demand.

? Exploring untapped markets in Africa, Latin America, and Southeast Asia can provide new growth avenues and reduce dependence on traditional markets.

Competitive Factors in the India Dye and Pigment Market

? India benefits from relatively low labour costs, which can significantly reduce overall production expenses.

? Access to locally sourced raw materials helps in minimising transportation costs and ensuring a steady supply chain, contributing to competitive pricing.

? Adoption of advanced manufacturing technologies and automation improves production efficiency, product quality, reduces waste and offers lucrative India dyes and pigments market opportunities.

? High-quality products that meet international standards are crucial for maintaining a competitive position.

? Increasing demand for sustainable and eco-friendly dyes and pigments offers opportunities for differentiation.

? Companies with well-established distribution networks can better serve domestic and international markets.

? Intense competition in the market necessitates competitive pricing strategies.

Key Players in the India Dyes and Pigments Market and Their Strategic Initiatives

Clariant AG

? Clariant focuses on diversifying its product portfolio to include a range of specialty dyes and pigments for various applications which can boost India dyes and pigments market revenue.

? The company is committed to sustainability, emphasizing the development of eco-friendly products and sustainable manufacturing practices.

DIC Corporation

? DIC invests heavily in research to innovate new pigment technologies and enhance product performance.

? Developing sustainable and environmentally friendly products, reducing the environmental impact of its operations fuels the demand of India dyes and pigments market.

Kiri Industries Ltd.

? Kiri Industries is focused on expanding its manufacturing capacity to meet growing demand, both domestically and internationally.

? Strengthening its export business by expanding its presence in international markets and exploring new market opportunities.

Atul Ltd.

? As per the India dyes and pigments market analysis, focusing on the development of innovative dyes and pigments to cater to

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the specific needs of various industries, including textiles, coatings, and plastics.

? Committed to sustainability, Atul Ltd. develops eco-friendly products and implements sustainable manufacturing practices.

Bodal Chemicals Ltd.

? Bodal Chemicals focuses on backward integration to secure raw material supply and improve cost efficiency in India dyes and pigments market.

? Investing in increasing manufacturing capacity to meet rising demand and expand market share.

India Dyes and Pigments Industry Segmentation

Dyes are material that are mixed into a solvent and used to change the colour of something. Pigment, on the other hand, refers to a highly coloured class of compounds used to dye certain materials. Pigments are stable at normal temperatures and have a high tinting capacity, so when applied on objects or combined with a liquid, only a small amount is required to see the colour.

Dyes Market Breakup by Type:

- ? Azo Dyes
- ? Acid Direct Dyes
- ? Disperse Dyes
- ? Oil Soluble
- ? Reactive Dyes
- ? Sulphur Dyes
- ? Vat Dyes
- ? Solubilised Vat Dyes
- ? Food Colours

Dyes Market Breakup by Application:

- ? Textiles
- ? Food
- ? Paper
- ? Leather
- ? Others

Pigments Market Breakup by Type:

- ? Optical Whitening Agents
- ? Organic Pigments
- ? Pigments Emulsion
- ? Inorganic Pigments

Pigments Market Breakup by Application:

- ? Paint and Coatings
- ? Plastics
- ? Printing Inks

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? Textiles

? Others

Based on region, the market can be segmented into:

? North Region

? East and Central Region

? West Region

? South Region

Competitive Landscape

Key India dyes and pigments market players are investing in the expansion of their production capabilities to meet the growing demand for dyes and pigments in diverse end-use sectors, ranging from textiles to food and beverages. Dyes and pigments companies in India are also focusing on the development of eco-friendly dyes and pigments amid the shift towards sustainability.

Clariant AG

Clariant AG, founded in 1995 and headquartered in Muttenz, Switzerland, is a prominent speciality chemical company that contributes to value creation with sustainable and innovative solutions. Some of its leading business segments include personal and home care, industrial applications, crop solutions, oil services, base chemicals, and mining solutions. With three business units and 68 production sites, the company achieved sales of CHF 4,377 million in 2023.

Sudarshan Chemical Industries Limited

Sudarshan Chemical Industries Limited, founded in 1951 and headquartered in Maharashtra, India, is one of the largest Indian colour and chemical companies. It is a global manufacturer of colour, solvent dyes, and effect pigment for use in printing and digital printing, coatings, plastics, and cosmetics applications. Some of its renowned brands include Sudafine, Sudaperm, Sudacolor, Sumica, and Sudadur, among others.

Atul Ltd

Atul Ltd, founded in 1947 and headquartered in Gujarat, India, is one of the largest integrated chemical companies in India. The company manufactures nearly 900 products, including resorcinol and derivatives, sulphur dyes, vat dyes, para Cresol and derivatives, sulphur dyes, tissue-cultured date palms, and intermediates, among others. It serves 4,000 customers across 30 industries globally.

Vipul Organics Ltd

Vipul Organics Ltd, founded in 1972 and headquartered in Maharashtra, India, is a prominent manufacturer of speciality chemicals such as pigment dispersions, pigments, pigment intermediates, dyestuffs, and naphthols, among others. Its products and solutions are utilised in various sectors like coatings, printing inks, masterbatches, textiles, paper, cosmetics, rubber, and soaps and detergents.

Other key players in the India dyes and pigments market include BASF SE, Asahi Songwon Colors Ltd, AksharChem, Bodal Chemical Ltd, Kiri Industries Limited, and Dynamic Industries Ltd, among others.

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