

## **India Charcoal Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)**

Market Report | 2025-10-09 | 109 pages | EMR Inc.

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### **Report description:**

The India charcoal market attained a value of USD 7.70 Billion in 2024 and is projected to expand at a CAGR of around 4.10% through 2034 . Innovative waste-to-charcoal conversion technologies are on the rise in India, converting municipal solid waste into high-quality, clean-burning charcoal, advancing circular economy objectives and providing a green alternative to traditional fuels. Furthermore, the incorporation of biochar in metallurgical operations contributes to reducing carbon footprints and fossil fuel reliance. This factor supports India's drive towards greener industrial activities and cleaner steel manufacturing, thus pushing the market to attain a value of USD 11.51 Billion by 2034 .

India is among the major producers of activated carbon. According to the International Coconut Community, India exported around 141,862 tons to the international market in January-December 2023. Tamil Nadu and Andhra Pradesh, which are coconut farming-rich states, are becoming the primary manufacturing centres of coconut shell charcoal, shaping the India charcoal market development. The expansion of export markets for Indian coconut shell and hardwood charcoal has bolstered domestic production, aligning with government initiatives to promote renewable and cleaner energy forms.

In Indian charcoal production processes, new-age technologies such as continuous carbonisation units, hot gas generation systems, and binder-less briquetting machines have improved production efficiency and quality of the produce. These advanced technologies lower emissions, mechanize quality checks based on PLC systems, and support large-scale green production. Such technologies are critical in order to achieve global quality standards and improve the nation's competitiveness for domestic as well as export-oriented uses of charcoal, thus fuelling the growth of the India charcoal market.

The rising preference for natural and organic beauty products is significantly driving the demand for activated charcoal in India's cosmetic and personal care industry. Brands like Biotique, Mamaearth, and Khadi Naturals have introduced charcoal-based face masks, cleansers, and soaps targeting urban Tier I consumers seeking chemical-free solutions for skin detoxification. Valued for its oil-absorbing and impurity-cleansing properties, activated charcoal has become a key ingredient in deep-cleansing and

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anti-pollution formulations.

## India Charcoal Market Report Summary

Description

Value

Base Year

USD Billion

2024

Historical Period

USD Billion

2018-2024

Forecast Period

USD Billion

2025-2034

Market Size 2024

USD Billion

7.70

Market Size 2034

USD Billion

11.51

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

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4.10%

CAGR 2025-2034 - Market by Region

North India

4.6%

CAGR 2025-2034 - Market by Region

East and Central India

4.2%

CAGR 2025-2034 - Market by Type

Coconut Shell

4.5%

CAGR 2025-2034 - Market by End Use

Cosmetics and Personal Care

5.4%

2024 Market Share by Region

East and Central India

22.7%

Key Trends and Recent Developments

April 2025

NTPC commissioned India's first Waste-to-Green Charcoal plant in Varanasi, converting municipal solid waste into eco-friendly charcoal. This initiative promotes sustainable waste management and offers a renewable alternative to conventional fossil fuels in power generation. It sets a precedent for large-scale charcoal production from municipal waste, diversifying feedstock sources and promoting industrial adoption of sustainable fuel alternatives.

November 2024

The Indian government launched a sustainable coal production initiative, reopening 30 discontinued mines to enhance output while minimizing environmental impact. This move supports energy security, employment, and aligns with India's focus on responsible resource utilization.

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November 2024

Tata Steel became the first Indian steelmaker to use biochar for reducing carbon emissions. Introduced in 2024, this initiative aligns with the company's decarbonization goals and supports sustainable steel production using renewable carbon sources.

April 2024

Leocorno Enterprises entered India's activated charcoal filter category, targeting rising demand for clean air solutions. The company aims to expand its presence across consumer durables, focusing on health-conscious and pollution-aware urban markets. This development reflects rising urban demand for high-grade charcoal in air purification, driving product innovation and market expansion.

#### Surge in Eco-friendly Cooking Fuel Alternatives

Charcoal briquettes are increasingly substituting firewood and LPG in rural and semi-urban sectors because of affordability and sustainability, redefining the India charcoal market trends and dynamics. Institutions like the Indian Institute of Forest Management (IIFM) have encouraged community-led charcoal ventures in Madhya Pradesh from early 2024. Moreover, entrepreneurs like Carbon Craft India have introduced smokeless briquettes for urban barbecue cooking, building awareness and demand. These changes indicate altered cooking habits corresponding to energy efficiency and environmental awareness.

#### Rising Demand in Metallurgical Applications

India's steel and iron industry is increasingly turning towards charcoal for lowering dependence on coke, especially in small and medium enterprises. The drive by the government under the "Green Steel" initiative, which was initiated in Q4 2024, for carbon-neutral production encourages this movement. Odisha and Chhattisgarh states are seeing increased purchases of charcoal briquettes. The Indian Institute of Metals is also considering the application of coconut shell charcoal for ferroalloy manufacturing. This increasing application in metallurgical operations is likely to boost charcoal demand in India over the next few years.

#### Increasing Application in Water and Air Purification

The activated charcoal category is witnessing growth as India scales up water purification and air quality initiatives. In 2024, urban infrastructure projects under the Atal Mission for Rejuvenation and Urban Transformation (AMRUT 2.0) started introducing activated charcoal filter systems in Tier II cities. Increased awareness for health and hygiene is driving demand in both government and private sectors, thus increasing the scope of application of charcoal. Such factors are primarily shaping new trends in the India charcoal market.

#### Use of Charcoal in Personal Care and Cosmetic Industry

Charcoal is being increasingly used in cosmetics due to its cleansing and oil-absorbing abilities. Activated charcoal is becoming a major ingredient in cosmetics such as face masks, cleansers, and shampoos. For example, Biotique's Activated Charcoal Face Wash and L'Oreal's Pure Clay Mask with charcoal are used to pull out impurities and minimize acne. The trend complements the increasing popularity for natural, chemicals-free skincare among urban India, especially among millennials, in search of effective remedies for pollution-induced skin problems.

#### Use of Charcoal in Art Supplies

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The growing demand for sustainable art materials, such as charcoal pencils and drawing tools made from recycled coconut shells is further influencing the overall India charcoal market value. This innovative approach supports both artistic expression and environmental responsibility. Startups such as Artline India and Eco Scribbler have come up with sustainable drawing materials that attract eco-friendly artists and students. They provide a biodegradable option for traditional graphite pencils along with waste valorisation support. This niche is gaining traction in art schools as well as among eco-conscious consumers looking for sustainable yet high-performance art tools, particularly in metropolitan cities such as Bengaluru and Mumbai.

#### India Charcoal Industry Segmentation

The EMR's report titled "India charcoal Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

##### Market Breakup by Type

- Briquettes
- Hardwood Lump
- Coconut Shell
- Binchotan

**Key Insight:** Briquettes are gaining massive significance in the market since it is affordable, of consistent quality, and convenient to use. Agricultural waste and sawdust briquettes provide a sustainable alternative to conventional wood charcoal that confronts deforestation issues, thus boosting the India charcoal market opportunities. They are becoming popular for cooking and heating purposes in rural and urban homes alike. Additionally, the coconut shell charcoal category is emerging in coastal states such as Kerala because of availability of raw material in large amounts and high carbon content, making it suitable for industrial applications as well as high-end grilling markets.

##### Market Breakup by End Use

- Cooking Fuel
- Metallurgical Fuel
- Water and air purification
- Healthcare
- Cosmetics and personal care
- Others

**Key Insight:** The metallurgical fuel sector is increasingly utilising charcoal, particularly in eastern and central parts of India. Charcoal is preferable among small and medium-sized foundries and forging units because of its high carbon content and stable heat, which is a key aspect of steel making and metal processing. The shift from coke, due to its high costs and availability concerns, is propelling further demand in the India charcoal market. In addition, government policies that promote the use of cleaner fuels in industries favour growth in this regard.

##### Market Breakup by Region

- North India
- East India
- South India
- West India

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Key Insight: The southern region experiences rapid momentum in the industry as it boasts charcoal manufacturing hubs in Pollachi (Tamil Nadu) and Alappuzha (Kerala). These centres provide high-quality activated charcoal to industries such as cosmetics and water treatment. Export-focused processing units in Mangalore and Tuticorin benefit from port proximity and consistent supply of coconuts. Demand from Korean and Middle Eastern buyers for non-wood, low-ash charcoal is accelerating capacity expansion, making South India the fastest-developing region.

CAGR 2025-2034 - Market by

Region

North India

4.6%

East and Central India

4.2%

West India

XX%

South India

XX%

India Charcoal Market Share

Hardwood lump charcoal dominates due to efficiency, heat, and local hardwood availability.

Hardwood lump charcoal occupies the dominant share in the Indian market, particularly in central and eastern parts of the country with high hardwood cover. It is used for its higher burning efficiency, extended burn, and maximum heat production, which is essential for metallurgical purposes and traditional cooking. Hardwood lump charcoal is made by indigenous kilns of local artisans and small industries, and hence there is a consistent supply. Its source being direct from hardwoods such as teak and sal only adds to its dominance on account of availability and reliability, attracting the key manufacturers of charcoal in India.

The briquettes sector is growing at the fastest pace, led by increased consumption in urban dwellings and small-scale industries, thus leading to India charcoal market growth. Briquettes, produced from agro-residues such as rice husk and sawdust, represent an affordable, environmentally friendly option amidst the rising forest protection measures. Their consistent size and moisture content find favour with commercial buyers in bakeries, brick kilns, and food processing. Government incentives for the promotion of clean energy and waste utilization schemes spur the rapid growth of this sector, particularly in Maharashtra and Karnataka.

Cooking fuel dominates due to affordability, rural use, cultural preference, and accessibility.

Cooking fuel registers the largest share in the India charcoal industry, especially in rural and tribal parts of Jharkhand, Odisha, and Chhattisgarh. Charcoal is a preferred fuel for traditional cooking because it is cheap, accessible, and has superior efficiency

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compared to firewood. In Jharkhand's Simdega district, numerous tribal families depend on hardwood lump charcoal as a source of daily cooking fuel since LPG services are unreliable and refilling is expensive. Local entrepreneurs employ local earth kilns to produce charcoal from forest wood, which finds its way to the nearby weekly markets for sale. Such micro-scale production and consumption behaviour is prevalent in other comparable rural belts in Odisha's Sundargarh and Chhattisgarh's Bastar, where charcoal is used as the first cooking fuel owing to its affordability, availability, and traditional cooking habits.

Personal care and cosmetics are growing at the fastest rate, led by increasing demand for activated charcoal in face masks, toothpaste, and scrubs, propelling the India charcoal market revenue growth. Domestic players and foreign entrants increasingly produce charcoal-based products as consumers increasingly ask for detox properties and natural ingredients. Digital marketing and growth of middle classes in cities lead this trend. Clusters in Tamil Nadu and Karnataka produce activated charcoal to be sold to the personal care market and industry, satisfying high quality and purity standards.

### India Charcoal Market Regional Analysis

East India dominates with hardwood charcoal from tribal belts and forest resources.

East India dominates the industry, with tribal and forest-dense districts of Jharkhand (Simdega, Gumla) and Chhattisgarh (Bastar) at the forefront. These districts supply considerable quantities of hardwood lump charcoal by traditional earth kilns from sal and teak wood, boosting the overall charcoal consumption in India. Charcoal is mostly consumed as cooking and metallurgical fuel. Indigenous demand, informal supply chains, and proximity of raw material ensure the region's control. Moreover, interstate supply chains provide support to small-scale industries in neighbouring states such as Bihar and Odisha.

South India emerges as fastest-developing region due to large-scale processing of coconut shells into charcoal in Tamil Nadu, Kerala, and Karnataka. Pollachi and Madurai districts have mechanized units that manufacture activated charcoal for export and domestic use in the cosmetics and filtration sectors. Ease of access to ports including Tuticorin, Mangalore facilitates quick overseas exports, particularly to South Korea and the Gulf countries, accelerating the scope of India charcoal market expansion. Increasing investment in refining and automation is quickly increasing capacity, drawing demand from urban and industrial consumers.

### Competitive Landscape

The market is relatively fragmented with a combination of organized players and local producers. Major India charcoal companies are increasing capacity, improving carbonization technology, and venturing into export markets to take advantage of the rising demand. Innovation, eco-certification, and logistics optimization continue to be key drivers of competitiveness.

Local India charcoal market players are targeting high-value forms such as activated charcoal and binchotan to appeal to overseas buyers. Start-ups and cooperatives are also joining the ecosystem with bio-friendly, community-made briquettes that find favour with value-conscious consumers. State sponsorship of MSME clusters in Tamil Nadu and Gujarat is facilitating technological upgradation, while growth in e-commerce platforms is facilitating direct-to-consumer delivery for personal care charcoal items. The competitive landscape is marked by growing differentiation by product application, local sourcing, and processing technology.

### Sagar Charcoal and Firewood Depot

Sagar Charcoal and Firewood Depot deals in hardwood lump charcoal and specialty briquettes. It was founded in 1990 and has its headquarters in Ahmedabad, India. It deals with both the domestic and export markets, focusing particularly on hospitality customers.

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## Kalpaka Chemicals

Kalpaka Chemicals specializes in coconut shell charcoal and activated carbon. Founded in 1975, it is based in Kerala and exports across Asia and Europe, with a strong reputation for high purity levels.

## MICBAC India

MICBAC India offers high-quality activated charcoal for industrial, air cleaning, and drug applications. It was incorporated in 2012 and is based in Kolkata. It has expanded by way of relentless technological upgradation.

## Coconut Products Impex

Coconut Products Impex specialises in coconut shell charcoal and activated carbon granules export. It has its head office in Tamil Nadu and was established in 2001. It caters to customers in the Middle East, Europe, and Southeast Asia.

Other key players in the report include Prithvi Chemical Manufacturing Company Pvt. Ltd., Kasturi Coconut Processing, and Suneeta Carbons, among others.

## Key Highlights of the India Charcoal Market Report:

- Historical performance and accurate forecasts through 2034, reflecting regulatory trends, rural fuel usage shifts, and emerging industrial dynamics.
- Insights into product innovations such as low-smoke, high-carbon biomass briquettes and activated charcoal tailored for pharma, cosmetics, and water filtration categories.
- In-depth competitive landscape profiling regional kiln operators, organised manufacturers, and emerging exporters tapping demand from Gulf and East Asian countries.
- Regional analysis uncovering supply hubs like Jharkhand, Chhattisgarh, and Odisha, and mapping demand growth in urban barbecue culture and steel manufacturing.
- Investment-focused outlook highlighting private equity interest in clean charcoal tech and scalable kiln infrastructure amidst growing scrutiny on deforestation and emissions.

## Why Rely on Expert Market Research?

- Decade-long expertise covering India's biomass, fuels, and industrial carbon sectors.
- Tailored strategic guidance for investors, traders, and processors navigating price volatility and ESG-aligned sourcing.
- Research methodology including ground-level market visits, local mandi trends, and government carbon data tracking.
- In-depth analysis of export economics, kiln tech ROI, and policy risk scenarios for sharper B2B decision-making.

## Call to Action

Unlock the full potential of the India charcoal market with Expert Market Research's 2025 and 2034 report . Whether you're a manufacturer, investor, or policy maker, gain valuable insights into emerging trends, regional dynamics, and competitive strategies. Download a free sample or schedule a consultation today to explore the evolving India charcoal market trends 2024 .

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