Spotlight

Demand for carbon black to rise at 11-13 per cent from 2010-11 to 2014-15

CRISIL Research expects domestic demand for carbon black to increase at a CAGR of 11-13 per cent from 2010-11 to 2014-15, driven largely by growth in the tyres segment. Most carbon black producers have lined up capacity additions between 2010-11 to 2014-15 to benefit from the growing end-market demand, with total net capacity addition plans of 373,000 tonnes. We expect carbon black production to increase at 10-12 per cent CAGR over 2010-11 to 2014-15. Although imports have been increasing, they would account for only around 9-10 per cent of total domestic demand over the forecast period.
Opinion

Summary

✓ Long term view
✓ Monthly State of the Market

Carbon Black

✓ Demand & Supply

• What is the domestic demand-supply outlook for carbon black?

✓ Prices & Tolling margins

• What are the factors driving carbon black prices and margins?

✓ Monthly State of the Market

Linear Alkyl Benzene

✓ Demand & Supply

• What is the domestic demand outlook?
• What is the outlook on domestic capacities and production?
• Will there be a structural change in India’s position in global trade?

✓ Prices & Tolling margins

• What is the outlook on LAB prices and tolling margins given the anticipated rise in feedstock prices?

✓ Monthly State of the Market

Commodity Chemicals
Methanol

- Demand & Supply
  - What is the domestic demand and supply outlook for methanol?

- Prices & Tolling margins
  - How will the changing global demand and supply dynamics impact domestic methanol prices?
  - What will be the impact of revision in natural gas prices on tolling margins for methanol?

- Monthly State of the Market

Phenol

- Demand & Supply
  - What is the domestic demand and supply outlook for phenol?
  - How will the supply composition change, going ahead?

- Prices & Tolling margins
  - What is the impact of changing industry dynamics on phenol prices and tolling margins?

- Monthly State of the Market

Phthalic Anhydride

- Demand & Supply
  - What is the domestic demand and supply outlook for PAN?
  - How would the industry dynamics change in the next couple of years?

- Prices & Tolling margins
  - What is the impact of rising feedstock prices and change in demand-supply scenario on PAN prices and margins?

- Monthly State of the Market
Industry Information

Glossary

Carbon Black

✓ Industry overview
  • What are the main demand drivers of the carbon black industry?

✓ Manufacturing process
  • How is carbon black manufactured?

✓ Duties & regulations
  • How has the duty structure changed over a period of time?

✓ Demand & Supply
  • What is the domestic demand - supply scenario for carbon black?
  • What is the global demand - supply scenario for carbon black?

✓ Price & profitability
  • What is the trend in prices and margins of carbon black?

✓ Competitive aspects
  • How is the Indian carbon black market scenario?
Linear Alkyl Benzene

✓ Industry overview

• What is the structure of the Indian LAB industry?
• What is the size of India's detergent market?

✓ Manufacturing process

• How is LAB manufactured?

✓ Duties & regulations

• How has the duty structure changed over a period of time?

✓ Demand & Supply

• What is the domestic demand - supply scenario?
• What are the factors affecting LAB demand?
• What is the global demand - supply scenario?

✓ Price & profitability

• What kind of trend have prices and margins seen over the years?

✓ Competitive aspects

• How competitive is India's LAB market?
• Who are the key players in the domestic LAB market?
• How is the bargaining power of Indian LAB producers as compared to the end-user industries?
Methanol

✓ Industry overview
  • What is the structure of the domestic methanol industry?
  • What are the basic applications of methanol?

✓ Manufacturing process
  • How is methanol manufactured and what are the various stages involved in it?

✓ Duties & regulations
  • How has the duty structure changed over a period of time?

✓ Demand & Supply
  • What is the domestic demand-supply scenario?
  • What are the factors affecting methanol demand?
  • What is the global demand-supply scenario?

✓ Price & profitability
  • How have methanol prices and margins moved over the past few years?

✓ Competitive aspects
  • What is the scenario in terms of competition in the Indian methanol market?
Phenol
✓ Industry overview
  • What is the structure of the Indian phenol industry?
  • What are the basic applications of phenol?
✓ Manufacturing process
  • How is phenol manufactured?
✓ Duties & regulations
  • How has the duty structure changed over a period of time?
✓ Demand & Supply
  • What is the domestic demand-supply scenario?
  • Who are the end-users for phenol?
  • What is the global demand-supply scenario?
✓ Price & profitability
  • What is the trend seen in prices and margins of phenol?

Phthalic Anhydride
✓ Industry overview
  • What is the structure of the Indian PAN industry?
✓ Manufacturing process
  • How is PAN manufactured?
✓ Duties & regulations
  • How has the duty structure evolved over a period of time?
✓ Demand & Supply
  • What is the domestic demand-supply scenario?
✓ Price & profitability
  • How have prices and margins of have PAN moved?

Commodity Chemicals
Player Profiles

✓ Carbon Black
  - Aditya Birla Nuvo Ltd
  - Cabot (India) Ltd
  - Phillips Carbon Black Ltd

✓ Linear Alkyl Benzene
  - Indian Oil Corporation Ltd
  - Nirma Ltd
  - Reliance Industries Ltd
  - Tamilnadu Petroproducts Ltd

✓ Methanol
  - Assam Petrochemicals Ltd
  - Deepak Fertilizers and Petrochemicals Corporation Ltd
  - Gujarat Narmada Valley Fertilizers Company Ltd
  - National Fertilizers Ltd
  - Rashtriya Chemicals and Fertilizers Ltd

✓ Phenol
  - Hindustan Organic Chemicals Ltd

✓ Phthalic Anhydride
  - Asian Paints Ltd
  - IG Petrochemicals Ltd
  - Mysore Petrochemicals Ltd
  - Thirumalai Chemicals Ltd
Data and Statistics

✓ Carbon Black
✓ Linear Alkyl Benzene
✓ Methanol
✓ Phenol
✓ Phthalic Anhydride
✓ Commodity Chemicals