

India Chemicals & Specialty Chemicals

Capability Statement for Chemical Manufacturers & Investors

Prologue is a cross-border advisory practice working with chemical manufacturers and investors across India, Europe, North America, and Asia-Pacific. This statement sets out our capability to support sourcing, partnership, joint-venture, and transaction decisions across the India–global specialty chemicals value chain — on both sides.

THE OPPORTUNITY — A VALUE CHAIN INTEGRATING ACROSS BORDERS

India is moving from supplier toward partner and consolidator in global specialty chemicals. Indian producers are climbing into capability-protected chemistries; capital is flowing into high-margin segments; and cross-border transactions are reshaping the competitive map. For manufacturers on both sides, the question is how to position — which segment, which counterpart, which structure.

PROCESS & SCALE	WORKFORCE & COST	TECHNOLOGY & IP	SPEC & BRAND	GROWTH MARKET
INDIA	INDIA	GLOBAL	GLOBAL	INDIA

~\$250B

India chemicals sector, 2024

~\$64B

India specialty chemicals (Prologue estimate)

6th

largest chemical producer globally

~\$100B

specialty chemicals by 2030 (Prologue estimate)

HOW WE SUPPORT — IN BOTH DIRECTIONS

- **Counterpart identification:** mapping and qualifying segment-fit partners on either side
- **Partnership & JV structuring:** sourcing, toll, dedicated-asset, licensing, and JV pathways
- **Transaction support:** target screening, diligence, and acquisition / minority-stake advisory
- **Segment & strategy intelligence:** sub-segment economics, capacity, and competitive dynamics

WHAT WE DELIVER

- Sub-segment economics, capacity, and competitive intelligence
- Counterpart mapping, qualification, and diligence
- Partnership, JV, and dedicated-asset structuring support
- Transaction screening and acquisition / minority-stake advisory

EVIDENCE OF CAPABILITY

Prologue has produced a research suite on India's place in the global specialty chemicals value chain — a flagship assessment of structure, competitive dynamics, and partnership pathways, and a producer-landscape companion for counterpart selection — drawing on data from IBEF, Invest India, the Department of Chemicals & Petrochemicals, and public company disclosures. These demonstrate the depth and bilateral fluency we bring; commissioned mandates extend this with primary research, counterpart qualification, and named target lists tailored to manufacturer and investor priorities.