

Hormuz Shockwave: How One Strait Could Disrupt Global Trade Overnight

The growing crisis in the Strait of Hormuz — a key route for nearly one-fifth of global oil shipments — is threatening global supply chains. In the short term, businesses may face higher fuel prices, freight disruptions, shipment delays, and increased logistics costs. Over the long term, companies could shift sourcing strategies, diversify suppliers, and redesign supply chains to reduce dependence on vulnerable trade routes. The crisis may also trigger inflation and impact industries dependent on petrochemicals, fertilizers, and energy-intensive manufacturing.

Source: Supply Chain Brain

Mitsubishi Chemical Plans Petrochemical Spin-Off Amid Industry Shake-Up

Mitsubishi Chemical Group is considering spinning off its petrochemical (basic chemicals) business into a wholly owned subsidiary as part of a major restructuring strategy. The move is aimed at improving competitiveness, enabling future mergers, strengthening supply chains, and supporting Japan's push toward greener, more sustainable chemicals. The company cited weak demand, declining competitiveness in East Asia, and supply-chain concerns as key reasons for the restructuring, with implementation targeted by FY2028.

Source: c&en

Europe's Adipic Acid Market Faces a Perfect Storm in Q2 2026

Europe's adipic acid market has faced a highly challenging year, driven by anti-dumping investigations on Chinese imports, plant closures and restructuring, rising raw material costs, and weak demand from construction and automotive sectors. Regulatory uncertainty around EU duties on Chinese adipic acid, higher benzene and ammonia costs, and ongoing geopolitical tensions have further squeezed producer margins, while market sentiment remains pessimistic amid inflation and slowing industrial activity.

Source: ICIS

Anupam Rasayan Enters Pharma Big League with Bliss GVS Stake Deal

Iran War Sends Shockwaves Through Global Commodity Markets

Anupam Rasayan India has signed a deal to acquire a 43.3%–48.2% stake in Bliss GVS Pharma for around ₹1,369 crore, along with an open offer to public shareholders for an additional 26% stake. The acquisition marks Anupam Rasayan's strategic entry into the pharmaceutical formulations space, strengthening its pharma value chain and creating synergies across CDMO capabilities, product portfolio, and customer relationships.

Source: Chemical Weekly

The ongoing Iran conflict is disrupting global commodity markets, creating volatility across oil, LNG, fertilizers, chemicals, metals, and freight. Supply chain risks around the Strait of Hormuz have led to higher logistics costs, export bottlenecks, and price swings in commodities such as crude oil, sulphur, ammonia, and fertilizers. Industries dependent on energy and raw materials are bracing for continued uncertainty as markets assess supply disruptions and recovery timelines.

Source: Argus Media

Dorf-Ketal Makes Strategic Splash with Vasu Chemicals Water Business Buy

Dorf-Ketal has entered India's industrial water treatment sector by acquiring the water treatment business of Vasu Chemicals. The move strengthens Dorf-Ketal's specialty chemicals portfolio and gives it access to a high-growth segment through Vasu's expertise in water treatment chemicals, process solutions, and dosing systems. The acquisition is expected to support expansion in both Indian and global water treatment markets.

Source: Chemical Weekly

Sodium Sulfide Market Set for Steady Growth, Expected to Cross \$1 Billion by 2034

The global sodium sulfide market, valued at around USD 662 million in 2025, is projected to grow to nearly USD 1.03 billion by 2034, registering a CAGR of 4.9%. Growth is being driven by rising demand from pulp & paper, leather processing, mining, textiles, and wastewater treatment, with Asia-Pacific—especially China and India—leading consumption due to strong industrial activity.

Source: Fortune Business Insights

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