

# ANALYSIS OF INDIA'S PLASTICS EXPORT

## DECEMBER 2025



### **THE PLASTICS EXPORT PROMOTION COUNCIL**

(Sponsored by Department of Commerce, Govt. of India)

Dynasty Business Park, B Wing, Unit 2

JB Nagar, Andheri Kurla Road

Andheri East, Mumbai

Maharashtra 400 059, INDIA

Tel: +91-22-40170000

E-mail: [office@plexconcil.org](mailto:office@plexconcil.org)

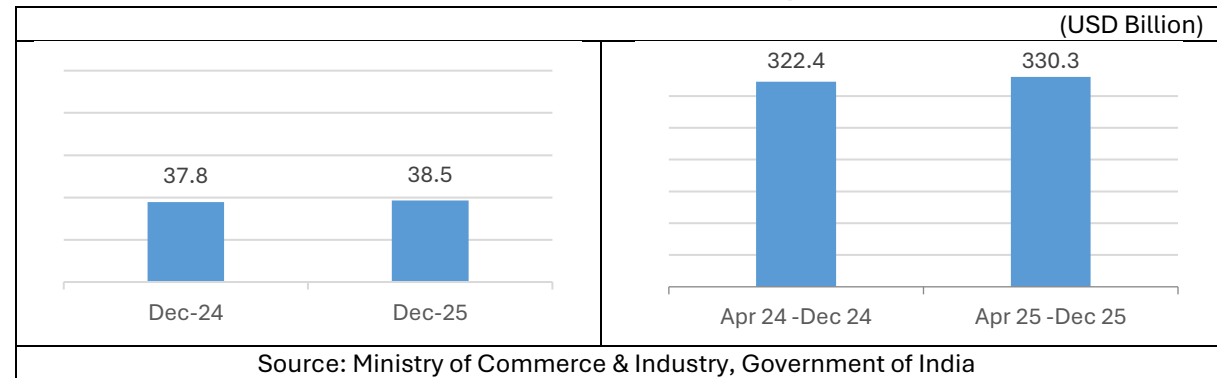
Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India.

| Key Findings                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Plastic exports declined 1.4% in December 2025 due to high U.S. tariffs, emerging trade barriers in Mexico, and intensified competition in other markets.               |
| The fall was also led by lower shipment of raw materials, which accounts for 25% of overall plastic exports                                                             |
| Exporters of Cordage & Fishnets, Pipes and Fittings and Floor Coverings continue to face slowdown in demand in key markets                                              |
| Exports of plastic films and sheets remained subdued due to production disruptions caused by a fire at the plant of major producer Jindal Poly Films earlier this year. |
| Exporters of some FIBC products (63053200) and (39232990) are benefitting from strong demand in Europe and African countries                                            |

## TREND IN OVERALL EXPORTS

India's merchandise exports grew 1.9% to USD 38.51 billion in December 2025 from USD 37.80 billion in the year ago month driven by strong increase in shipment of electronics, drugs & pharmaceuticals, chemicals, textiles and agro products, including meat, dairy, poultry and marine products. During April-December 2025, exports posted 2.44% growth to USD 330.29 billion from the year ago period.

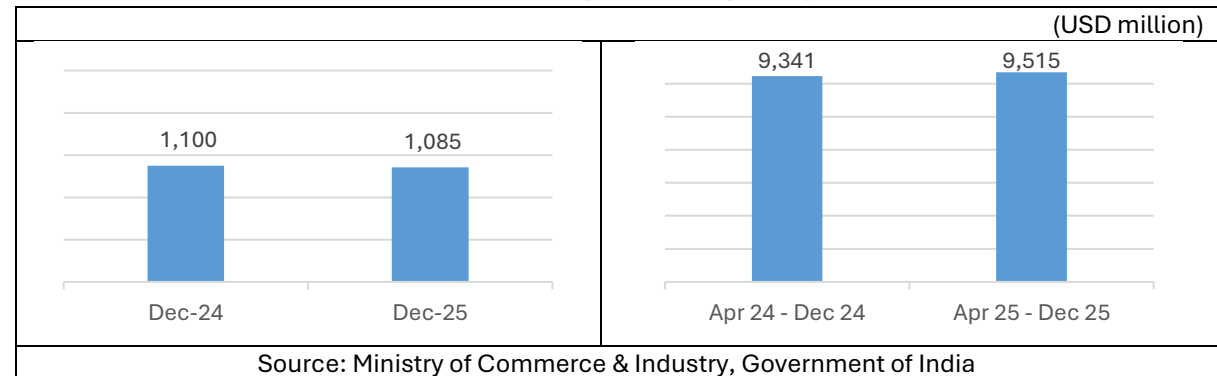
**Exhibit 1: Trend in overall merchandise exports from India**



## TREND IN PLASTICS EXPORT

In December 2025, India witnessed 1.4% decline in plastic exports to USD 1,085 million from USD 1,100 million in the year ago month. Cumulative exports during April-December 2025 posted 1.9% growth to USD 9,515 million from USD 9,341 million in the year ago period led by strong growth in shipment of FIBC, Human Hair, Consumer & Houseware products, Packaging Items and other products.

**Exhibit 2: Trend in plastics export by India**



## PLASTICS EXPORT, BY PANEL

In December 2025, exports of plastics and related products declined 1.4% because of contraction in shipment of Films & Sheets, Raw Materials, Packaging Item, Medical Products, Pipes and Fittings and Cordage & Fishnets.

At the same time, there was growth in shipment of FIBC & Woven Sacks, Human Hair, Miscellaneous Products Consumer & Houseware Items and Writing Instruments.

**Exhibit 3: Panel-wise % growth in plastics export from India**

| Panel                                       | Dec -24        | Dec -25        | Growth       | Apr 24-<br>Dec -24 | Apr 25-<br>Dec -25 | Growth       |
|---------------------------------------------|----------------|----------------|--------------|--------------------|--------------------|--------------|
|                                             | USD million    |                | %            | USD million        |                    | %            |
| Consumer & houseware products               | 72.4           | 76.2           | +5.3%        | 580.5              | 655.3              | +12.9%       |
| Cordage, fishnets & monofilaments           | 27.8           | 23.7           | -14.6%       | 228.5              | 209.2              | -8.5%        |
| FIBC, Woven sacks, Woven fabrics, Tarpaulin | 139.2          | 155.4          | +11.7%       | 1,148.5            | 1,353.3            | +17.8%       |
| Floorcoverings, leathercloth & laminates    | 69.4           | 60.4           | -12.9%       | 572.4              | 514.0              | -10.2%       |
| FRP & Composites                            | 39.9           | 40.2           | +0.7%        | 386.5              | 372.0              | -3.7%        |
| Human hair & related products               | 75.9           | 94.7           | +24.9%       | 572.2              | 686.0              | +19.9%       |
| Medical items of plastics                   | 45.6           | 43.3           | -5.1%        | 414.9              | 415.7              | +0.2%        |
| Miscellaneous products and items nes        | 62.3           | 71.8           | +15.3%       | 508.4              | 652.6              | +28.4%       |
| Packaging items - flexible, rigid           | 59.8           | 57.1           | -4.5%        | 508.8              | 526.7              | +3.5%        |
| Plastic films and sheets                    | 178.8          | 166.7          | -6.8%        | 1,529.5            | 1,427.8            | -6.6%        |
| Plastic pipes & fittings                    | 33.8           | 28.7           | -15.3%       | 251.9              | 236.9              | -6.0%        |
| Plastic raw materials                       | 276.8          | 246.7          | -10.9%       | 2,427.9            | 2,283.4            | -6.0%        |
| Writing instruments & stationery            | 18.8           | 20.1           | +7.1%        | 211.3              | 181.8              | -13.9%       |
| <b>Total</b>                                | <b>1,100.3</b> | <b>1,085.1</b> | <b>-1.4%</b> | <b>9,341.3</b>     | <b>9,514.7</b>     | <b>+1.9%</b> |

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** grew 5.3% because of rise in shipment of Plastic Builderware (HS 39259090) to UAE, Saudi Arabia, Egypt, UK and also to USA. Export of Other Household and Toilet Articles (HS 39249090) also posted growth to UK, UAE, Panama and other markets. There was also 35% growth in export of Travel Bags and other articles of Plastics (HS 42029200) to Germany, USA and Australia.

Export of **Cordage, Fishnets & Monofilaments** declined 14.6% led by fall in shipment of Polyethylene/Polypropylene Cordage (HS 56074900) to Chile, Singapore, Canada and other major destinations. Also, there was decline in export of Made-up Fishing Nets (HS 560811) to Faroe Island, UAE and other destinations. Exporters also faced weak demand for Monofilaments (HS 39169028) in USA.

Shipment of **FIBC, Woven Sacks and Woven Fabrics** posted 11.7% growth led by rise in export of FIBC (HS 63053200) to European countries such as the Netherland, Germany, UK and Spain. There was also strong demand for Sacks & Bags (HS 39232990) in Djibouti, Senegal, Sudan, Guinea, Tanzania and other emerging markets. Exporters also faced robust order inflows for Polyethylene or Polypropylene Sacks and Bags (HS 63053300) from the USA, UAE and other destinations.

Export of **Floor Covering, Leather Cloth and Laminates** declined 12.9% because of weak demand for Plastic Coated Fabrics (HS 59039090) in USA, Canada and other key markets. Also, there was contraction in shipment of Other Polymers of Vinyl Chloride (HS 39181090) to USA, Saudi Arabia, Ireland and other markets.

Export of **FRP and Composites** witnessed marginal growth of 0.7% because of rise in shipment of Reservoirs, Tanks, Vats and Other Containers (HS 39251000) to UK, Bhutan and other markets.

Shipment of **Human Hair & Related Products** grew 24.9% led by sharp rise in exports of unworked Human Hair (HS 05010010) to Myanmar. Exporters also benefitted from robust demand for value added Human Hair (HS 67030010) in China, Viet Nam and other countries. Demand for Wigs, Nets, Eyebrows (HS 670420) is gaining momentum in France.

Export of **Medical Items of Plastics** declined 5.1% as there was weak demand for Blood Transfusion Apparatus including Containers (HS 90189032) in Belgium and Thailand. There was also lower sales of Spectacles, Goggles and other items (HS 90049090) in UK, France and Canada. Export of Spectacle Lenses (HS 90015000) was also lower in UAE and USA.

Shipment of **Miscellaneous Products & Items n.e.s.** posted 15.3% growth because of robust demand for Optical Fibres, Bundles and Cables (HS 90011000) in USA and Poland. Exporters also benefitted from strong order inflows for Objective Lenses (90021100) from Hong Kong, Singapore, UAE, China. There was also increase in shipment of (90019090) to USA.

Export of **Packaging Items – Flexible and Rigid** declined 4.5% because exporters faced weak demand for Sacks & Bags (39232100) in USA, UK, Puerto Rico and other markets. Also, there was fall in shipment of Carboys, Bottles and other Plastic Articles (39233090) to Saudi Arabia, Bangladesh and other markets. Demand for Other Conveyance or Packaging articles (39239020) was also tepid in European countries such as Czech Republic, Belgium and other markets.

Export of **Plastic Films & Sheets** fell 6.8% because of lower shipment of Propylene Plates and Sheets (392020) to USA, Mexico, Saudi Arabia, Spain and other markets. There was also decline in export of PET Plates and Sheets (392062) to USA, Mexico, Bangladesh, Egypt and other countries. Shipment of Sun Dust Control Film (39206929) is also showing signs of slowdown to Thailand and South Korea.

Shipment of **Plastic Pipes & Fittings** declined 15.3% led by lower sales of Other Tubes, Pipes and Hoses (391739) to Saudi Arabia, Malaysia and Israel. There was also weak demand for Fittings for Tubes, Pipes and Hoses (39174000) in Viet Nam, Nepal, Germany and other markets. Exporters also faced weak order inflows for Tubes, Pipes and Hoses of Rigid Plastics (39172990) in markets such as Uganda and Italy.

Export of **Plastic Raw Materials** declined 10.9% because of fall in shipment of Polypropylene (39021000) to Turkey, Viet Nam, Bangladesh, Thailand and other markets. Exporters also reduced sales of PET Resins (39076190) in countries such as Saudi, Morocco, UAE and Japan. There was also sharp fall in export of LLDPE (39014010) to China, Viet Nam, Nepal, Bangladesh.

Shipment of **Writing Instruments & Stationery** grew 7.1% supported by strong demand for Pen Nibs and Nib Points (960891) in countries such as Bangladesh, USA and Nigeria. Also, exporters benefitted from robust order inflows for Refills for Ball Point Pens (960860) in countries such as USA, Turkey and Nepal. There is also growth in shipment of Articles of Office or School Supplies (392610) to USA and Mexico. Exports of Other Ball Point Pens (96081099) also witnessed considerable growth to Russia, Turkey, Myanmar, Chile, Australia, Mexico and other markets.

**Exhibit 4: Details of % change seen in top 50 items of export**

| Code     | Description                                                                                                                                                   | Apr 24-<br>Dec-24 | Apr 25-<br>Dec-25 | Growth |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|--------|
|          |                                                                                                                                                               | Values in USD Mn  |                   | (%)    |
| 63053200 | Flexible intermediate bulk containers                                                                                                                         | 681.1             | 821.9             | +20.7% |
| 67030010 | Human hair, dressed, thinned, bleached or otherwise worked                                                                                                    | 432.8             | 475.9             | +10.0% |
| 39269099 | Other articles of plastics n.e.s                                                                                                                              | 381.0             | 366.7             | -3.8%  |
| 39232990 | Other sacks and bags of plastics excl. those of polymers of ethylene                                                                                          | 352.0             | 410.1             | +16.5% |
| 39021000 | Polypropylene                                                                                                                                                 | 298.5             | 213.5             | -28.5% |
| 39076190 | Other primary form of polyethylene terephthalate                                                                                                              | 245.2             | 189.1             | -22.9% |
| 48239019 | Decorative laminates                                                                                                                                          | 237.6             | 267.3             | +12.5% |
| 90011000 | Optical fibres, optical fibre bundles and cables                                                                                                              | 230.5             | 374.9             | +62.6% |
| 39206220 | Flexible and plain sheets and film of non-cellular polyethylene terephthalate                                                                                 | 203.3             | 144.4             | -29.0% |
| 39269080 | Polypropylene articles                                                                                                                                        | 191.4             | 175.0             | -8.6%  |
| 39069090 | Other acrylic polymers, in primary forms                                                                                                                      | 187.4             | 179.9             | -4.0%  |
| 39202020 | Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced                                                                       | 181.3             | 148.2             | -18.3% |
| 59039090 | Sacks and bags, incl. cones, of polymers of ethylene                                                                                                          | 165.4             | 115.5             | -30.2% |
| 39232100 | Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane                                   | 164.8             | 153.7             | -6.8%  |
| 39239090 | Other articles for the conveyance or packaging of goods, of plastics                                                                                          | 154.7             | 162.4             | +5.0%  |
| 05010010 | Human hair, unworked                                                                                                                                          | 136.0             | 206.9             | +52.2% |
| 39014010 | Linear low density polyethylene (LLDPE)                                                                                                                       | 151.3             | 86.2              | -43.0% |
| 39202090 | Films and sheets of non-cellular polymers of ethylene, not reinforced                                                                                         | 123.8             | 115.4             | -6.8%  |
| 90015000 | Spectacle lenses of materials other than glass                                                                                                                | 120.2             | 120.9             | +0.6%  |
| 90183930 | Cannulae                                                                                                                                                      | 109.4             | 124.8             | +14.1% |
| 39012000 | Polyethylene with a specific gravity of $\geq 0.94$ ,                                                                                                         | 112.0             | 89.5              | -20.1% |
| 39219099 | Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked                                      | 108.0             | 95.7              | -11.3% |
| 96081019 | Ball-point pens                                                                                                                                               | 102.1             | 95.4              | -6.5%  |
| 39199090 | Other self-adhesive sheets and film of plastics, whether or not in rolls $> 20$ cm wide                                                                       | 96.1              | 86.5              | -10.0% |
| 56074900 | Twine, cordage, ropes and cables of polyethylene or polypropylene                                                                                             | 97.3              | 88.1              | -9.5%  |
| 39046100 | Polytetrafluoroethylene                                                                                                                                       | 95.8              | 104.7             | +9.3%  |
| 54072090 | Woven fabrics of strip or the like, of synthetic filament, incl. monofilament of $\geq 67$ decitex and with a cross sectional dimension of $\leq 1$ mm: Other | 93.6              | 88.1              | -6.0%  |
| 39076990 | Other primary form of polyethylene terephthalate                                                                                                              | 89.9              | 92.5              | +2.9%  |

| Code     | Description                                                                                                                                                                           | Apr 24-<br>Dec-24 | Apr 25-<br>Dec-25 | Growth |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|--------|
|          |                                                                                                                                                                                       | Values in USD Mn  |                   | (%)    |
| 39129090 | Other cellulose and chemical derivatives thereof, n.e.s., in primary forms                                                                                                            | 85.8              | 102.8             | +19.7% |
| 39219094 | Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked                                            | 87.6              | 79.1              | -9.7%  |
| 39181090 | Other floor coverings, whether or not self-adhesive, in rolls or in the form of tiles, and wall or ceiling coverings in rolls with a width of >= 45 cm, of polymers of vinyl chloride | 84.1              | 46.5              | -44.7% |
| 39046990 | Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms                                                                                             | 78.4              | 74.8              | -4.6%  |
| 39241090 | Other tableware and kitchenware, of plastics                                                                                                                                          | 76.3              | 73.8              | -3.2%  |
| 39206919 | Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported                                                                                                | 73.7              | 82.2              | +11.6% |
| 39206290 | Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported                                                                                | 69.9              | 60.7              | -13.1% |
| 39072990 | Other polyethers n.e.s                                                                                                                                                                | 66.1              | 58.6              | -11.4% |
| 39140020 | Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or                                                                       | 65.9              | 66.2              | +0.3%  |
| 39095000 | Polyurethanes, in primary forms                                                                                                                                                       | 62.7              | 65.7              | +4.7%  |
| 39206929 | Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported                                                                                | 66.5              | 64.3              | -3.2%  |
| 39204900 | Sheets and film of non-cellular polymers of vinyl chloride, containing by weight < 6% of plasticisers, not reinforced                                                                 | 61.9              | 62.4              | +0.9%  |
| 96032100 | Toothbrushes                                                                                                                                                                          | 56.2              | 69.1              | +22.8% |
| 39119090 | Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s.                                                                          | 61.4              | 64.6              | +5.1%  |
| 59031090 | Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride                                                                                               | 56.6              | 59.8              | +5.6%  |
| 39219096 | Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials                                                       | 57.4              | 65.1              | +13.3% |
| 39201019 | Other sheets and film of non-cellular plastics                                                                                                                                        | 57.2              | 66.2              | +15.7% |
| 39235010 | Caps and closures for bottles                                                                                                                                                         | 55.8              | 53.4              | -4.3%  |
| 39011090 | Other polyethylene with a specific gravity of < 0.94                                                                                                                                  | 52.0              | 68.3              | +31.3% |
| 39172390 | Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other                                                                                             | 54.2              | 58.3              | +7.5%  |
| 39076930 | PET flake (chip)                                                                                                                                                                      | 47.7              | 54.4              | +14.1% |
| 39241010 | Tableware and kitchenware, of plastics: Insulated ware                                                                                                                                | 49.5              | 59.9              | +21.0% |

Source: Ministry of Commerce & Industry, Government of India

### Exhibit 5: Reasons for major decline in plastic products exports

| HS Code  | Description                                        | Apr 24-<br>Dec 24 | Apr 25-<br>Dec 25 | Reasons for decline                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|----------|----------------------------------------------------|-------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          |                                                    | (USD Mn)          |                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 39021000 | Polypropylene, in primary forms                    | 298.5             | 213.5             | Exports have fallen because of sharp decline in shipment to Bangladesh as manufacturers are wary of exporting to this market, which is facing political uncertainty.<br><br>Also, India is a net importer of this product because of domestic shortage. Outward shipments have fallen as exporters preferred to meet high local demand. Also, decline in prices of raw materials have led to lower export realisation.                                                                                                                                                                       |
| 39014010 | Linear low density polyethylene (LLDPE)            | 151.3             | 86.2              | Exports have fallen because of slowdown in demand in key markets such as China, Viet Nam and Bangladesh;<br><br>Exporters are also wary of sending consignments to Bangladesh that is facing political crisis.<br><br>Further, India is a net importer of this product due to a shortfall in domestic production. Therefore, exporters are choosing to meet rising local demand amid the growing shortage. This surge in domestic demand is reflected in a 42% increase in imports of this product during April–December 2025.                                                               |
| 39206220 | Flexible & plain sheets & film of non-cellular PET | 203.3             | 144.4             | Exports have fallen because of production disruption at the Nashik plant of the leading manufacturer Jindal Poly Films earlier this year due to fire.<br>Exports declined also because of sizeable fall in shipment to Mexico, which is the fourth largest market for this product. Indian exporters are facing non tariff barrier in Mexico, where the government has reportedly hiked tariff and also increased import guarantee per container from about USD 60,000 to nearly USD 200,000.                                                                                                |
| 39076190 | PET, Other primary form                            | 245.2             | 189.1             | Indian exporters are facing declining import demand for this product in Saudi Arabia and other Gulf countries as these nations have ramped up domestic production capacity of these products;<br><br>Also, Indian exporters face stiff price competition from local producers in these countries who can avail cheaper input materials (ethane-based feedstock) from the domestic market<br><br>Further, Indian exporters preferred to meet growing demand in the domestic market. Rising domestic demand is evident from 17.6% growth in import of this product during April-November 2025. |
| 59039090 | Sacks and bags of polymers of ethylene             | 165.4             | 115.5             | The decline in exports is due to the hike in tariff by USA, which accounts for 83% of India’s exports.<br><br>Exports to Canada, which is the third largest market, have also been falling due to high freight cost.                                                                                                                                                                                                                                                                                                                                                                         |

| HS Code  | Description                                                                            | Apr 24-<br>Dec 24 | Apr 25-<br>Dec 25 | Reasons for decline                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------|----------------------------------------------------------------------------------------|-------------------|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          |                                                                                        | (USD Mn)          |                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 39181090 | Other floor coverings in rolls with a width of >= 45 cm, of polymers of vinyl chloride | 84.1              | 46.5              | Exports have declined as Indian exporters are losing ground in the USA market following the tariff increase. USA accounts for 77 % of this product’s exports.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 39202020 | Flexible and plain sheets and film of non-cellular polymers of ethylene                | 181.3             | 148.2             | <p>Exports to USA, which is the largest market for this product, is affected by the hike in tariff.</p> <p>Exports have fallen also because of decline in order inflows from Tanzania, Italy, Brazil and Spain, which are major markets for this product. High freight cost is also a challenge for MSME exporters who are operating on thin margin.</p> <p>Mexico is another large market where shipments have been affected because of tariff and non-tariff barriers. Mexico has reportedly hiked tariff on Indian exports by as much as 35% and also increased import guarantee per container from about USD 60,000 to nearly USD 200,000.</p> <p>Exports have fallen also because of production disruption at the Nashik plant of the leading manufacturer Jindal Poly Films earlier this year due to fire.</p> |

Source: Ministry of Commerce & Industry, Government of India, Plexconcil Research

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