

# ANALYSIS OF INDIA'S PLASTICS EXPORT

## NOVEMBER 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)

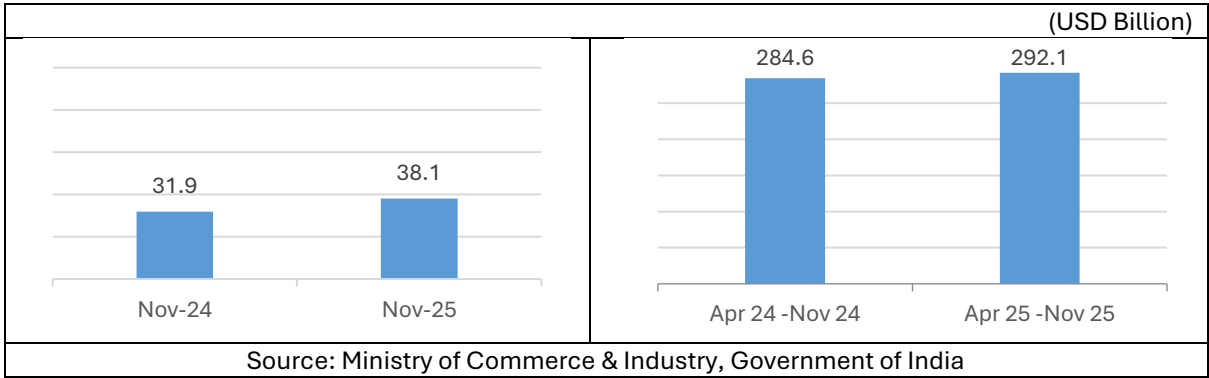
Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India.

| Key Findings                                                                                                                                                                                |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| After declining for two consecutive months (Sept-Oct), India's plastic exports rebounded with 8% growth in November 2025, demonstrating resilience in the face of the US tariff impact      |
| Exports of Cordage & fishnets and FRP & Composites posted growth in November after six months of contraction or stagnation, with the last positive performance recorded in April this year. |
| In the US market, exporters benefitted from strong order inflows for select products such as Optical Fibres, Bundles and Cables (HS 90011000) and Syringes (HS 901831)                      |

### TREND IN OVERALL EXPORTS

India's merchandise exports posted 19.37% growth to USD 38.13 billion in November 2025 from USD 31.94 billion in the year ago month led by rise in shipments of petroleum, engineering goods, gems & jewellery, pharmaceuticals, chemicals, textiles, handicrafts and many agro commodities. During April-November 2025, exports posted 2.62% growth to USD 292.07 billion from the year ago period.

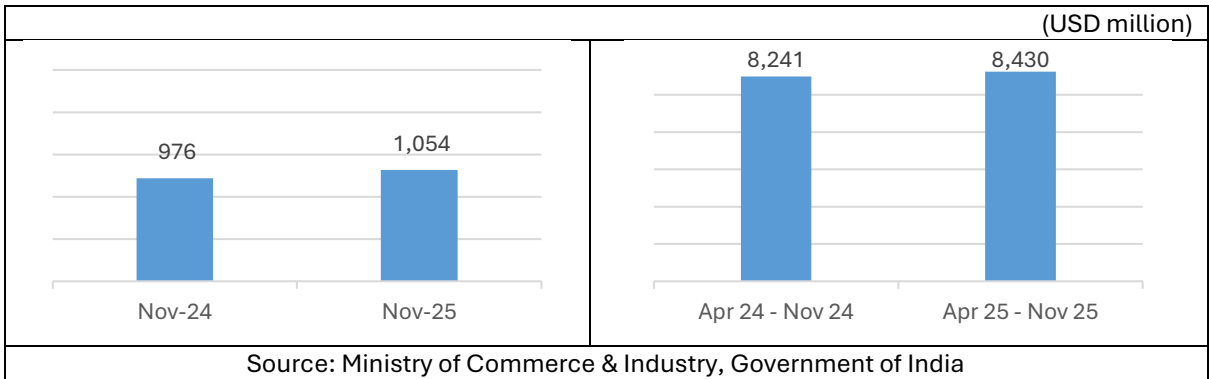
**Exhibit 1: Trend in overall merchandise exports from India**



### TREND IN PLASTICS EXPORT

During November 2025, India's plastic exports posted 8% growth to USD 1054 million from USD 976 million in the year ago month. Cumulative exports during April-November 2025 posted 2.3% growth to USD 8,429.7 million from USD 8,241.0 million in the year ago period led by strong growth in shipment of FIBC, Consumer & Houseware products, Human Hair and other panels.

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



## PLASTICS EXPORT, BY PANEL

In November 2025, exports of plastics and related products recorded overall growth compared to the previous year. The expansion was driven by strong performance in value-added segments such as miscellaneous products, writing instruments & stationery, FIBC and woven products, and consumer & houseware items. Human hair & related products and FRP & composites also showed healthy growth during the month. However, exports of plastic raw materials declined, and floorcoverings, leathercloth & laminates witnessed a contraction. Despite these challenges, the positive momentum in downstream and value-added segments supported the overall export performance in November 2025.

### Exhibit 3: Panel-wise % growth in plastics export by India

| Panel                                       | Nov-24       | Nov -25        | Growth      | Apr 24-<br>Nov -24 | Apr 25-<br>Nov -25 | Growth      |
|---------------------------------------------|--------------|----------------|-------------|--------------------|--------------------|-------------|
|                                             | USD million  |                | %           | USD million        |                    | %           |
| Consumer & houseware products               | 58.8         | 74.6           | +26.9       | 508.2              | 579.1              | +14.0       |
| Cordage, fishnets & monofilaments           | 22.3         | 23.3           | +4.9        | 200.7              | 185.5              | -7.6        |
| FIBC, Woven sacks, Woven fabrics, Tarpaulin | 115.7        | 152.1          | +31.5       | 1,009.3            | 1,197.9            | +18.7       |
| Floorcoverings, leathercloth & laminates    | 57.1         | 52.5           | -8.0        | 503.0              | 453.6              | -9.8        |
| FRP & Composites                            | 34.2         | 39.4           | +15.2       | 346.6              | 331.8              | -4.3        |
| Human hair & related products               | 67.8         | 80.1           | +18.2       | 496.3              | 591.3              | +19.1       |
| Medical items of plastics                   | 42.0         | 43.6           | +3.9        | 369.3              | 372.4              | +0.8        |
| Miscellaneous products and items nes        | 53.2         | 75.1           | +41.1       | 446.1              | 580.8              | +30.2       |
| Packaging items - flexible, rigid           | 50.8         | 56.6           | +11.3       | 449.0              | 469.5              | +4.6        |
| Plastic films and sheets                    | 152.8        | 161.0          | +5.3        | 1,350.7            | 1,261.2            | -6.6        |
| Plastic pipes & fittings                    | 24.0         | 26.1           | +8.5        | 218.1              | 208.2              | -4.5        |
| Plastic raw materials                       | 282.5        | 249.5          | -11.7       | 2,151.1            | 2,036.7            | -5.3        |
| Writing instruments & stationery            | 15.0         | 20.0           | +33.3       | 192.5              | 161.7              | -16.0       |
| <b>Total</b>                                | <b>976.2</b> | <b>1,053.9</b> | <b>+8.0</b> | <b>8,241.0</b>     | <b>8,429.7</b>     | <b>+2.3</b> |

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** posted 26.9% growth because exporters started diversifying shipments of Tableware & Kitchenware (HS 392410) to Benin, Senegal, Germany and other markets. Also, there is strong demand for Tooth Brushes (HS 96032100) and other consumer goods in Belgium, UAE and the Netherland. There is also strong demand for Building materials of plastics (HS **39259090**) in USA despite hike in tariff.

Export of **Cordage, Fishnets & Monofilaments** recorded 4.9% growth (second monthly growth this year after April) led by strong order inflows for Monofilaments (HS 39169090) from Germany and emerging demand in Indonesia, Australia. There is also rise in demand for Other Twines and Cordage (HS 56081900) in Norway. Indian exporters also benefited from sustained demand for Other Cordage (HS 56074900) in Morocco.

Shipment of **FIBC, Woven Sacks and Woven Fabrics** grew 31.5% as exporters benefitted from strong demand for FIBC (HS 63053200) in Norway, Spain and other countries. Exporters also diversified shipments of Sacks and Bags (HS 39232990) to Sudan, Tanzania, besides other markets such as UAE and Senegal.

Export of **Floor Covering, Leather Cloth and Laminates** declined 8.0% because of sharp fall in shipments of Other Floorcovering (HS 59039090) to USA amidst hike in tariff. There was also lower demand for PVC Floor and Wall Coverings (HS 39181090) in UAE and Italy, besides USA.

Export of **FRP and Composites** posted 15.2% growth during November 2025 (first monthly growth after April this year) because of strong demand for Other Plastic Products (HS 39269099) in UAE, UK, Saudi Arabia and other countries. Exporters also benefited from growing order inflows from Georgia, Lithuania, Latvia and Panama for FRP and Composite products.

**Human Hair & Related Products** recorded 18.2% rise in shipments led by strong demand for value added Human Hair (HS 67030010) in Indonesia and Viet Nam. Exporters also benefited from robust demand for Raw Human Hair (HS 05010010) in Bangladesh.

**Medical Items of Plastics** witnessed 3.9% rise in exports during November this year as exporters benefited from healthy demand for Catheters (HS 901839) in Brazil, Russia and Algeria, despite decline in shipments to USA. There was also strong order inflows for Syringes (HS 901831) from Switzerland, Germany, Sudan and Canada. Even USA demand remained resilient for this product.

**Miscellaneous Products & Items n.e.s.** posted 41.1% growth in shipments led by robust demand for Optical Fibres Bundles and Cables (HS 90011000) in USA, China, Poland and Morocco. This product has a large share of 67% in the total export of this panel. As a result of remarkable growth in exports of this product, its share in this panel has grown from 49% in November last year.

**Packaging Items – Flexible and Rigid** recorded 11.3% rise in exports driven by strong demand for Stoppers, Lids and Caps (HS 392350) in Kenya and recovering demand for this product in UAE and China. Exporters are also benefiting from robust order inflows for Other Conveyance or Packaging items (HS 39239090) from Russia, Cote D'Ivoire, UAE and other countries.

**Plastic Films & Sheets** posted 5.3% export growth led by encouraging demand for Packaging Film (HS 39206919) in Israel, Ghana and Spain. There is also increase in order inflows for Propylene Plates and Sheets (HS 39202090) from UAE, Mexico, Nigeria and Australia.

Shipment of **Plastic Pipes & Fittings** witnessed 8.5% growth because of strong rise in shipment of Other PVC Tubes, Pipes and Hoses (HS 39172390) to Oman, Kenya, UAE and other markets. Also, there is growth in exports of Flexible Tubes and Pipes (HS 39173100) to Singapore, besides recovery in demand in China. Indian exporters are also experiencing rising demand for Polyethylene Tubes (HS 39172110) in Congo, Canada, Australia, UK, Russia and other markets.

**Plastic Raw Materials** exports declined 11.7% as exporters reduced overseas sales to meet shortage in the domestic market. Specifically, exporters curtailed shipment of Other PET (HS 39076190) to UAE and Nepal. Exporters have also reduced shipment of Polypropylene (HS 39021000) to Turkey, Nepal and Viet Nam; and Polyethylene (HS 39012000) to Viet Nam and China.

Shipment of **Writing Instruments & Stationery** grew a whopping 33.3% because of strong demand for Other Liquid Ink Ball Point Pens (HS 96081019) in Colombia; Exporters also benefitted from recovery in demand for this product in Algeria and Russia.

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

| HS Code  | Description                                                                                                                                                   | Apr 24-<br>Nov-24 | Apr 25-<br>Nov 25 | Growth |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|--------|
|          |                                                                                                                                                               | Values in USD Mn  |                   | (%)    |
| 63053200 | Flexible intermediate bulk containers                                                                                                                         | 600.5             | 727.1             | +21.1% |
| 67030010 | Human hair, dressed, thinned, bleached or otherwise worked                                                                                                    | 370.1             | 407.7             | +10.2% |
| 39269099 | Other articles of plastics n.e.s                                                                                                                              | 341.7             | 327.3             | -4.2%  |
| 39232990 | Other sacks and bags of plastics excl. those of polymers of ethylene                                                                                          | 307.6             | 364.7             | +18.6% |
| 39021000 | Polypropylene                                                                                                                                                 | 261.2             | 189.1             | -27.6% |
| 39076190 | Other primary form of polyethylene terephthalate                                                                                                              | 219.5             | 168.2             | -23.3% |
| 48239019 | Decorative laminates                                                                                                                                          | 209.3             | 233.4             | +11.5% |
| 90011000 | Optical fibres, optical fibre bundles and cables                                                                                                              | 201.1             | 327.8             | +63.0% |
| 39206220 | Flexible and plain sheets and film of non-cellular polyethylene terephthalate                                                                                 | 181.1             | 129.2             | -28.7% |
| 39269080 | Polypropylene articles                                                                                                                                        | 168.3             | 160.9             | -4.4%  |
| 39069090 | Other acrylic polymers, in primary forms                                                                                                                      | 165.2             | 158.3             | -4.2%  |
| 39202020 | Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced                                                                       | 158.5             | 130.0             | -18.0% |
| 59039090 | Sacks and bags, incl. cones, of polymers of ethylene                                                                                                          | 143.7             | 102.3             | -28.8% |
| 39232100 | Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane                                   | 146.3             | 138.5             | -5.4%  |
| 39239090 | Other articles for the conveyance or packaging of goods, of plastics                                                                                          | 136.5             | 144.0             | +5.5%  |
| 05010010 | Human hair, unworked                                                                                                                                          | 123.1             | 180.7             | +46.8% |
| 39014010 | Linear low density polyethylene (LLDPE)                                                                                                                       | 134.7             | 81.1              | -39.8% |
| 39202090 | Films and sheets of non-cellular polymers of ethylene, not reinforced                                                                                         | 110.3             | 103.2             | -6.5%  |
| 90015000 | Spectacle lenses of materials other than glass                                                                                                                | 107.4             | 108.8             | +1.2%  |
| 90183930 | Cannulae                                                                                                                                                      | 95.8              | 110.9             | +15.8% |
| 39012000 | Polyethylene with a specific gravity of $\geq 0.94$ ,                                                                                                         | 99.6              | 79.0              | -20.7% |
| 39219099 | Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked                                      | 96.9              | 84.9              | -12.4% |
| 96081019 | Ball-point pens                                                                                                                                               | 91.3              | 84.4              | -7.6%  |
| 39199090 | Other self-adhesive sheets and film of plastics, whether or not in rolls $> 20$ cm wide                                                                       | 86.7              | 75.4              | -13.0% |
| 56074900 | Twine, cordage, ropes and cables of polyethylene or polypropylene                                                                                             | 85.0              | 77.3              | -9.1%  |
| 39046100 | Polytetrafluoroethylene                                                                                                                                       | 84.8              | 94.8              | +11.7% |
| 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 | 82.6              | 76.4              | -7.5%  |
| 39076990 | Other primary form of polyethylene terephthalate                                                                                                              | 81.1              | 79.9              | -1.4%  |

| HS Code  | Description                                                                                                                                                                           | Apr 24-<br>Nov-24 | Apr 25-<br>Nov 25 | Growth |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|-------------------|--------|
|          |                                                                                                                                                                                       | Values in USD Mn  |                   | (%)    |
| 39129090 | Other cellulose and chemical derivatives thereof, n.e.s., in primary forms                                                                                                            | 75.8              | 91.0              | +20.0% |
| 39219094 | Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked                                            | 76.5              | 68.5              | -10.5% |
| 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 | 73.9              | 42.8              | -42.1% |
| 39046990 | Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms                                                                                             | 70.0              | 67.4              | -3.8%  |
| 39241090 | Other tableware and kitchenware, of plastics                                                                                                                                          | 66.6              | 66.4              | -0.3%  |
| 39206919 | Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported                                                                                                | 64.4              | 73.5              | +14.1% |
| 39206290 | Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported                                                                                | 62.0              | 54.2              | -12.5% |
| 39072990 | Other polyethers n.e.s                                                                                                                                                                | 57.4              | 56.7              | -1.4%  |
| 39140020 | Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or                                                                       | 58.3              | 58.0              | -0.5%  |
| 39095000 | Polyurethanes, in primary forms                                                                                                                                                       | 56.8              | 58.5              | +2.9%  |
| 39206929 | Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported                                                                                | 56.3              | 56.3              | -0.1%  |
| 39204900 | Sheets and film of non-cellular polymers of vinyl chloride, containing by weight < 6% of plasticisers, not reinforced                                                                 | 54.4              | 55.4              | +1.8%  |
| 96032100 | Toothbrushes                                                                                                                                                                          | 48.6              | 61.4              | +26.2% |
| 39119090 | Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s.                                                                          | 54.8              | 56.1              | +2.3%  |
| 59031090 | Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride                                                                                               | 50.4              | 52.2              | +3.6%  |
| 39219096 | Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials                                                       | 51.9              | 57.2              | +10.4% |
| 39201019 | Other sheets and film of non-cellular plastics                                                                                                                                        | 50.1              | 57.9              | +15.6% |
| 39235010 | Caps and closures for bottles                                                                                                                                                         | 50.1              | 47.0              | -6.1%  |
| 39011090 | Other polyethylene with a specific gravity of < 0.94                                                                                                                                  | 45.8              | 59.9              | +30.8% |
| 39172390 | Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other                                                                                             | 47.7              | 50.2              | +5.1%  |
| 39076930 | PET flake (chip)                                                                                                                                                                      | 41.6              | 51.8              | +24.6% |
| 39241010 | Tableware and kitchenware, of plastics: Insulated ware                                                                                                                                | 39.8              | 50.4              | +26.5% |

Source: Ministry of Commerce & Industry, Government of India

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

| HS Code  | Description                                                                            | Apr 24-<br>Nov 24 | Apr 25 –<br>Nov 25 | Reasons for decline                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------|----------------------------------------------------------------------------------------|-------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          |                                                                                        | (USD Mn)          |                    |                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 39021000 | Polypropylene, in primary forms                                                        | 261.2             | 189.1              | Exports have fallen because exporters have reduced shipments to meet domestic shortage of this raw material. India is a net importer of this raw material as domestic production is not sufficient to meet local demand.<br>Also, decline in prices of raw materials have led to lower export realisation                                                                                                                  |
| 39014010 | Linear low density polyethylene (LLDPE)                                                | 134.7             | 81.1               | India is a net importer of this product due to a shortfall in domestic production. Exports have declined as exporters are choosing to meet rising local demand amid the growing shortage. This surge in domestic demand is reflected in a 36% increase in imports of this product during April–November 2025.                                                                                                              |
| 39206220 | Flexible & plain sheets & film of non-cellular PET                                     | 181.1             | 129.2              | Exports have fallen because the recent fire at the Nashik facility of the leading manufacturer Jindal Poly Films has disrupted production.<br>Also, 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 | Other primary form                                                                     | 219.5             | 168.2              | Exporters have reduced overseas sales 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. Exports have declined also because of lower shipments to UAE, where Indian exporters are facing intense competition from local players. UAE is the second largest market for this product.                                  |
| 59039090 | Sacks and bags of polymers of ethylene                                                 | 143.7             | 102.3              | USA accounts for 35% of export revenue for exporters of this product. Shipments to USA has suffered because of hike in tariff since end August this year.                                                                                                                                                                                                                                                                  |
| 39181090 | Other floor coverings in rolls with a width of >= 45 cm, of polymers of vinyl chloride | 73.9              | 42.8               | Exports have fallen as US importers withheld orders for this product amidst hike in US Tariff. USA is the prominent market accounting for 33% of export of this product.                                                                                                                                                                                                                                                   |
| 39202020 | Flexible and plain sheets and film of non-cellular polymers of ethylene                | 158.5             | 130.0              | Exports have fallen because of production disruption at the Nashik facility of the leading manufacturer Jindal Poly Films.<br>Exports have taken hit also because of tariff barrier in USA and Mexico, which are top three markets for this product. 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. |

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

-----End of report -----