

ANALYSIS OF INDIA'S PLASTICS EXPORT

OCTOBER 2025



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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

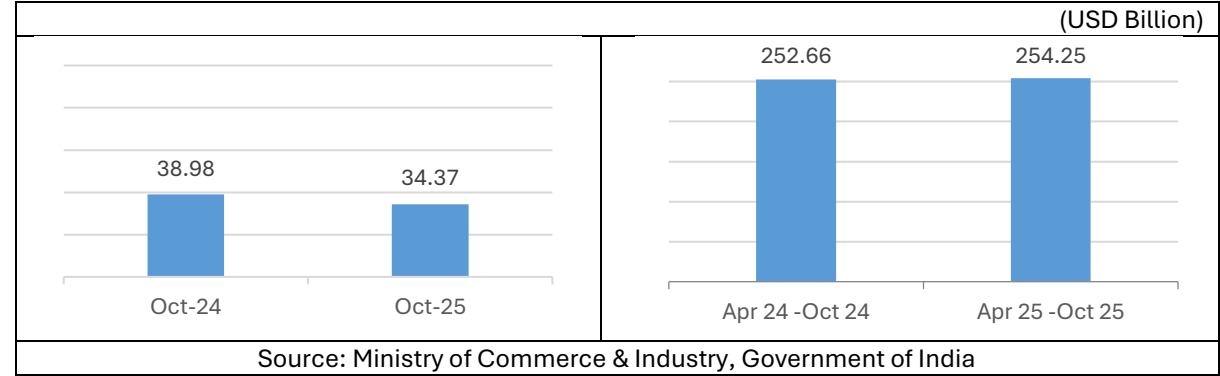
Key Findings
Plastic exports posted second consecutive monthly decline during October 2025 as shipments to the major market, USA, was adversely affected by the hike in tariff
During the month, plastic exports fell 15.1% led by decline in shipment of all product panels, except Miscellaneous items (which managed to post 15.4% growth)
In the Miscellaneous category, there was a sharp growth in export of Optical Fibres and Cables (HS 90011000) because of strong demand in USA (despite the tariff hike)

TREND IN OVERALL EXPORTS

India’s merchandise exports posted 11.82% decline to USD 34.37 billion in October 2025 from USD 38.98 billion in the year ago month because of contraction in shipments of major categories such as petroleum, engineering goods, gems & jewellery, chemicals, textiles, handicrafts and most of the agro commodities. The fall in exports comes amidst the imposition of additional tariff by USA, which is the largest market for Indian goods.

During April-October 2025, exports posted 0.63% growth to USD 254.25 billion from the year ago period.

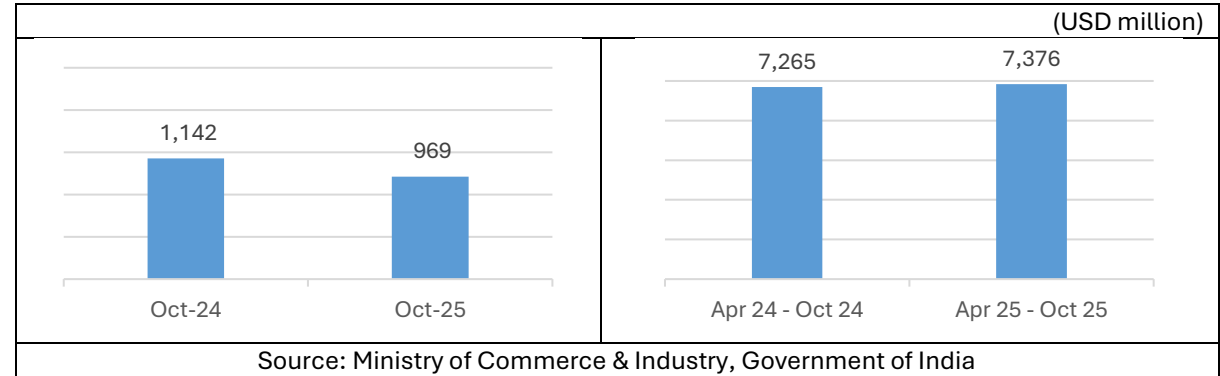
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During October 2025, India’s plastic exports declined 15.1% to USD 969 million from USD 1,142 million in the year ago month. However, cumulative exports during April-October 2025 posted 1.5% growth to USD 7,376 million from USD 7,265 million in the year ago period as exporters frontloaded shipments to USA ahead of the implementation of the additional US tariff.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In October 2025, export of all the product panels witnessed decline except Miscellaneous products and items. Notably, there was sharp fall in exports of films and sheets, raw materials, floorcovering & laminates during the month. Miscellaneous item is the only product panel that managed to post positive growth (15.4%) in October 2025.

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

Panel	Oct-24	Oct -25	Growth	Apr 24- Oct -24	Apr 25- Oct -25	Growth
	USD million		%	USD million		%
Consumer & houseware products	71.4	64.8	-9.2%	449.3	504.5	+12.3%
Cordage, fishnets & monofilaments	29.6	22.6	-23.4%	178.5	162.1	-9.2%
FIBC, Woven sacks, Woven fabrics, Tarpaulin	149.4	140.9	-5.7%	893.6	1,045.8	+17.0%
Floorcoverings, leathercloth & laminates	68.0	44.5	-34.6%	446.0	401.1	-10.1%
FRP & Composites	45.0	39.3	-12.6%	312.3	292.4	-6.4%
Human hair & related products	76.6	74.5	-2.8%	428.5	511.2	+19.3%
Medical items of plastics	50.4	45.0	-10.7%	327.3	328.8	+0.4%
Miscellaneous products and items nes	61.9	71.4	+15.4%	392.9	505.7	+28.7%
Packaging items - flexible, rigid	62.0	52.1	-16.0%	398.2	413.0	+3.7%
Plastic films and sheets	176.9	139.3	-21.3%	1,197.9	1,100.2	-8.2%
Plastic pipes & fittings	32.2	25.4	-21.2%	194.1	182.2	-6.1%
Plastic raw materials	295.5	232.8	-21.2%	1,868.6	1,787.2	-4.4%
Writing instruments & stationery	23.1	16.4	-29.1%	177.5	141.7	-20.2%
Total	1,141.9	968.9	-15.1%	7,264.8	7,375.8	+1.5%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** declined 9.2% led by sharp decline in shipment of tableware and kitchenware (HS 39241090) to USA; USA accounts for 25% of India's total exports of this product. There was also fall in export of other products such as Tooth Brushes (HS 96032100), Other Household and Toilet Articles (HS 39249090) to USA.

Export of **Cordage, Fishnets & Monofilaments** fell 23.4% because of weak demand for Other Cordage (HS 56074900) in USA and UAE. Shipment of Monofilament related plastic products (HS 39169028) was also affected by rise in the US tariff. Exporters also faced decline in order inflows for other related products (HS 39169090) in Bangladesh.

FIBC, Woven Sacks and Woven Fabrics exports declined 5.7% led by fall in sales of Other Woven Fabrics (HS 54072090), Sacks & Bags (HS 39232990), FIBC products (HS 63053200) to USA, which is the principal market for these products.

Export of **Floor Covering, Leather Cloth and Laminates** fell 34.6% because of remarkable contraction in shipment of Other Fabrics (HS 59039090) and Other PVC Floorcovering (HS 39181090) to USA. There was also weak demand for Other PVC Coated Fabrics (HS 59031090) in UAE, apart from USA.

Export of **FRP and Composites** contracted 12.6% led by sharp decline in shipment of Other Plastic Articles (HS 39269099) to USA, which is the leading market, accounting for more than 40% of India's exports in this category.

Export of **Human Hair & Related Products** fell 2.8% because of decline in sales of Dressed or Worked Human Hair (HS 67030010) to USA. There is also weak demand for this product in Paraguay, which is one of the top 5 export destinations for this product.

Medical Items of Plastics posted 10.7% decline in exports because of fall in sales of Cannulae (HS 90183930), Catheters (HS 90183910) and other products to USA. There was also weak demand for other Medical items such as Blood Transfusion Apparatus (HS 90189032) in Belgium and other markets, besides USA.

Miscellaneous Products & Items n.e.s. is the only panel that posted positive growth (15.4%) during the month because of more than 3-fold growth in shipment of Optical fibres and cables (HS 90011000) to USA despite the hike in US tariff. USA is the leading market as 28% of Indian shipment goes to this market for this product (HS '90011000). There was also strong demand for PVC Belt Conveyor (HS 39269010) in Canada.

Packaging Items – Flexible and Rigid witnessed 16% decline in exports because of sharp fall in shipments of Sacks & Bags of Polyethylene (HS 39232100) to USA, which accounts for more than 50% of India's exports. There is also weak demand for this product in UK, which is one of the leading markets. Exporters are also facing weak order inflows from neighbouring countries such as Sri Lanka and Nepal for Bottle Caps and Closures (HS 39235010)

Shipments of **Plastic Films & Sheets** fell 21.3% during the month because of sharp decline in export of PET Films and Sheets (HS 39206220), Propylene Plates & Sheets (HS 39202090), Plain, Flexible Plates & Sheets (HS 39202020) to USA. There is also weak demand for Plain, Flexible Plates & Sheets (HS 39202020) in Mexico and Spain.

Exports of **Plastic Pipes & Fittings** have fallen 21.2% because of decline in sales of Flexible Tubes, Pipes and Hoses (HS 39173100) and Other Tubes Pipes and Hoses (HS 39173990) to USA. There is also weak demand for plastic fittings for Tubes, Pipes and Hoses in Nepal, Saudi Arabia and Bangladesh in recent months. Indian exporters have also faced slowdown in orders from Iraq, Mexico and Oman for Other Tubes and Pipes (HS 39172390)

Exports of **Plastic Raw Materials** witnessed 21.2% contraction in October 2025 led by weak demand for Other Acrylic Polymers (HS 39069090) in South Africa, Bangladesh and UAE. There was also decline in export of other raw materials such as Polytetrafluoroethylene (HS 39076190) to UAE. Demand for Polypropylene (HS 39021000) was also weak in key markets such as Turkey, Nepal, Viet Nam and in neighbouring markets such as Sri Lanka and Bangladesh.

Exports of **Writing Instruments & Stationery** fell 29.1% in October 2025 led by lower shipment of Felt-tipped and other porous tipped pens (HS 96082000) and Other Ball Point Pens (HS 96081019) to USA. There is also weak demand for Other Ball Point Pens (HS 96081019) in Algeria, Other Ball Point Pens without Liquid Inks (HS 96081099) in Brazil and USA.

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

HS Code	Description	Apr 24- Oct-24	Apr 25- Oct 25	Growth
		Values in USD Mn		(%)
63053200	Flexible intermediate bulk containers	530.9	635.7	+19.7%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	317.6	349.8	+10.1%
39269099	Other articles of plastics n.e.s	308.3	288.3	-6.5%
39232990	Other sacks and bags of plastics excl. those of polymers of ethylene	273.1	316.9	+16.1%
39021000	Polypropylene	226.9	160.8	-29.1%
39076190	Other primary form of polyethylene terephthalate	189.2	150.8	-20.3%
48239019	Decorative laminates	188.0	201.8	+7.4%
90011000	Optical fibres, optical fibre bundles and cables	174.9	277.7	+58.8%
39206220	Flexible and plain sheets and film of non-cellular polyethylene terephthalate	158.4	114.8	-27.5%
39269080	Polypropylene articles	149.3	147.3	-1.3%
39069090	Other acrylic polymers, in primary forms	145.6	136.0	-6.6%
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced	139.7	112.6	-19.4%
59039090	Sacks and bags, incl. cones, of polymers of ethylene	124.6	92.7	-25.5%
39232100	Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane	129.8	124.1	-4.3%
39239090	Other articles for the conveyance or packaging of goods, of plastics	121.2	125.0	+3.1%
05010010	Human hair, unworked	108.1	158.8	+46.9%
39014010	Linear low density polyethylene (LLDPE)	101.1	72.4	-28.4%
39202090	Films and sheets of non-cellular polymers of ethylene, not reinforced	98.3	89.6	-8.8%
90015000	Spectacle lenses of materials other than glass	95.1	96.8	+1.8%
90183930	Cannulae	84.1	98.8	+17.5%
39012000	Polyethylene with a specific gravity of ≥ 0.94 ,	86.0	68.9	-20.0%
39219099	Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	86.3	74.4	-13.8%
96081019	Ball-point pens	82.7	73.1	-11.6%
39199090	Other self-adhesive sheets and film of plastics, whether or not in rolls > 20 cm wide	75.3	63.5	-15.7%
56074900	Twine, cordage, ropes and cables of polyethylene or polypropylene	75.6	67.3	-11.0%
39046100	Polytetrafluoroethylene	75.5	82.1	+8.7%
54072090	Woven fabrics of strip or the like, of synthetic filament, incl. monofilament of ≥ 67 decitex and with a cross sectional dimension of ≤ 1 mm: Other	73.3	66.7	-9.0%
39076990	Other primary form of polyethylene terephthalate	71.9	69.0	-4.1%

HS Code	Description	Apr 24- Oct-24	Apr 25- Oct 25	Growth
		Values in USD Mn		(%)
39129090	Other cellulose and chemical derivatives thereof, n.e.s., in primary forms	66.8	78.8	+18.0%
39219094	Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	67.5	59.0	-12.6%
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	65.2	39.8	-39.0%
39046990	Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms	63.1	59.9	-5.1%
39241090	Other tableware and kitchenware, of plastics	59.6	57.5	-3.5%
39206919	Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported	57.1	63.9	+12.0%
39206290	Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported	54.9	48.1	-12.4%
39072990	Other polyethers n.e.s	46.6	55.3	+18.8%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or	52.1	50.6	-2.9%
39095000	Polyurethanes, in primary forms	50.0	50.5	+0.9%
39206929	Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported	52.0	48.7	-6.4%
39204900	Sheets and film of non-cellular polymers of vinyl chloride, containing by weight < 6% of plasticisers, not reinforced	48.1	47.3	-1.7%
96032100	Toothbrushes	42.7	53.2	+24.5%
39119090	Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s.	48.1	51.4	+6.8%
59031090	Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride	45.2	45.2	-0.0%
39219096	Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials	46.1	51.1	+10.8%
39201019	Other sheets and film of non-cellular plastics	45.7	50.7	+10.8%
39235010	Caps and closures for bottles	45.0	40.7	-9.6%
39011090	Other polyethylene with a specific gravity of < 0.94	41.2	51.2	+24.1%
39172390	Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other	43.0	43.4	+0.7%
39076930	PET flake (chip)	37.2	50.5	+35.7%
39241010	Tableware and kitchenware, of plastics: Insulated ware	34.2	41.9	+22.6%

Source: Ministry of Commerce & Industry, Government of India

Exhibit 5: Reasons for major decline in plastic products exports

HS Code	Description	Apr 24- Oct 24	Apr 25 – Oct 25	Reasons for decline
		(USD Mn)		
39021000	Polypropylene, in primary forms	226.9	160.8	Exports have fallen due to sharp decline in shipments to Bangladesh, Sri Lanka and also other major destinations such as Turkey and Portugal. Also, India is import-dependent for this raw material because of insufficient local production capacity to meet growing domestic demand; As a result exporters have focused more on meeting domestic demand and have scaled down their exports.
39206220	Flexible & plain sheets & film of non-cellular PET	158.4	114.8	Exports have declined due to lower shipments to USA amidst the hike in tariff. Shipments have fallen also because of lower demand in Italy and Spain, which are the other leading markets for this product.
39076190	Other primary form	189.2	150.8	Shipments have fallen because exporters have chosen to meet growing domestic demand for this raw material. Even though India is a net exporter of this material, there has been growing demand in processing industries such as automotive, electrical, aerospace, medical devices, food processing, chemical, industrial machinery and so on. Growing domestic demand is reflected in rising imports, which has more than doubled from USD 99 million in FY23 to USD 223 million in FY25.
59039090	Sacks and bags of polymers of ethylene	124.6	92.7	Exports have fallen because of sharp decline in shipment to USA, which is the leading market for this product. Exports have fallen remarkably in September and October this year. Particularly, in October, exports have fallen nearly 80% to USA.
39014010	Linear low density polyethylene (LLDPE)	101.1	72.4	Exports have fallen because exporters have chosen to meet domestic demand in response to shortage of this raw material in the local market. There is growing domestic demand for this product, which is reflected in its rising import; Import of this product has grown to USD 214 million in April-October 2025 from USD 158 million in the year ago period.
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene	139.7	112.6	Exports have fallen because of lower demand in Mexico, Spain and Colombia during this period. Also, the hike in US tariff affected shipments as USA is the topmost destination for this product.
39181090	Other floor coverings in rolls with a width of >= 45 cm, of polymers of vinyl chloride	65.2	39.8	Exports have fallen sharply because of weak demand in USA, especially in the last two months after the imposition of additional tariff. In October 2025, India’s exports of this product to USA fell 87%, while it fell nearly 90% in September 2025.

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

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