

ANALYSIS OF INDIA'S PLASTICS EXPORT

SEPTEMBER 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

September 2025 was a challenging month for Indian exporters as the US tariff hike came into effect from this month. Plastic exports contracted 4.4% to USD 1,054 million in this month.

This marks the first monthly decline in plastic exports this financial year as many Indian exporters faced order cancellations from their US clients due to a sharp rise in tariff cost.

Exports of nine product panels witnessed decline, while shipment of four panels posted double digit growth during September 2025

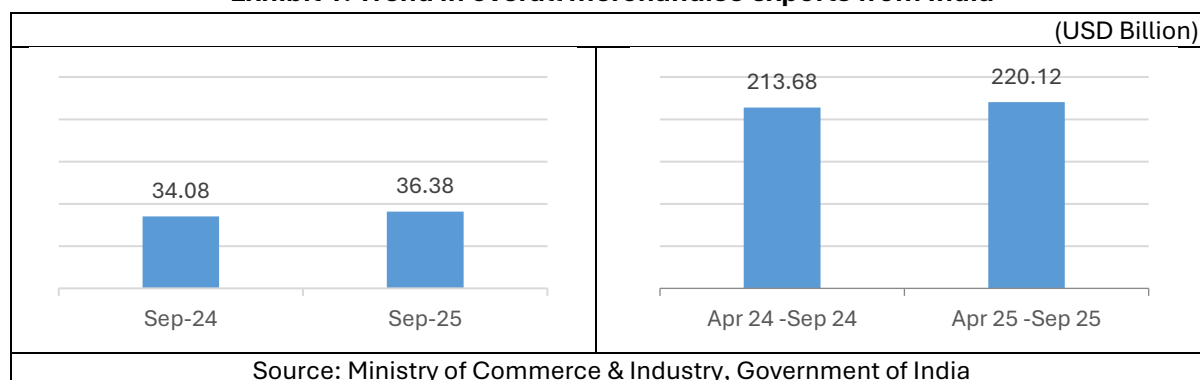
Exporters of Consumer & Houseware products, FIBC and Woven Sacks benefitted from strong demand in African countries, Europe and Australia.

TREND IN OVERALL EXPORTS

India's merchandise exports grew 6.7% to USD 36.38 billion in September 2025 from USD 34.08 billion in the year ago month, led by rise in shipments of petroleum products and electronics. Increase in exports of chemicals, engineering and agro products also aided overall growth in exports during the month.

Cumulative merchandise exports during April 2025 – September 2025 grew 3.02% to USD 220.12 billion from USD 213.67 billion in the year ago period.

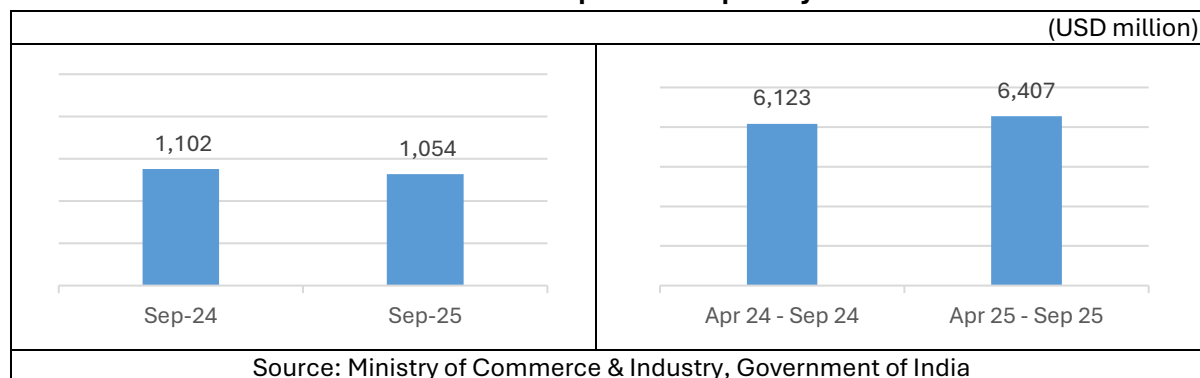
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During September 2025, India's plastic exports contracted 4.4% to USD 1,054 million from USD 1,102 million in the year ago month. However, cumulative exports during April-September 2025 grew 4.6% to USD 6407 million from USD 6,123 million in the year ago period because of strong increase in shipments in the earlier months of the year.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In September 2025, export of four product panels witnessed double digit growth, while shipment of other nine panels posted contraction. Exports of consumer & houseware, FIBC, Woven sacks, Human Hair and Miscellaneous products registered double digit growth.

On the other hand, there was contraction in shipment of Cordage & fishnets, Floorcoverings, FRP & Composites, Medical items and Packaging Products. There was also decline in exports of films & sheets, pipes & fittings, raw materials and writing instruments.

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

Panel	Sep-24	Sep-25	Growth	Apr 24-Sep-24	Apr 25-Sep-25	Growth
	USD million		%	USD million		%
Consumer & houseware products	61.1	72.4	+18.5%	378.0	439.7	+16.3%
Cordage, fishnets & monofilaments	26.1	22.5	-14.1%	148.9	139.5	-6.3%
FIBC, Woven sacks, Woven fabrics, Tarpaulin	143.1	159.1	+11.2%	744.3	904.9	+21.6%
Floorcoverings, leathercloth & laminates	63.1	50.8	-19.5%	378.0	356.6	-5.7%
FRP & Composites	45.9	40.1	-12.5%	267.3	253.1	-5.3%
Human hair & related products	65.2	78.3	+20.0%	352.0	436.7	+24.1%
Medical items of plastics	49.8	46.2	-7.2%	276.9	283.8	+2.5%
Miscellaneous products and items nes	54.8	74.9	+36.6%	331.0	434.3	+31.2%
Packaging items - flexible, rigid	59.6	56.2	-5.8%	336.2	360.9	+7.4%
Plastic films and sheets	178.6	155.3	-13.0%	1,021.0	960.9	-5.9%
Plastic pipes & fittings	27.5	25.4	-7.5%	161.9	156.8	-3.1%
Plastic raw materials	276.4	252.7	-8.6%	1,573.1	1,554.4	-1.2%
Writing instruments & stationery	50.9	20.4	-60.0%	154.4	125.4	-18.8%
Total	1,102	1,054	-4.4%	6,123	6,407	+4.6%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** posted 18.5% growth despite the adverse impact of the US tariff hike because there was strong demand for products such as Toothbrushes (HS 96032100), other household and toilet articles (39249090) in Europe, UAE, Mexico, UK and other countries. Exporters benefitted from strong order inflows from African countries such as Benin, Ghana and Senegal for Tableware & Kitchenware items (39241010).

Cordage, Fishnets & Monofilaments registered 14.1% decline in exports during September 2025 led by fall in shipment of Cordage (HS 56074900) to UAE, Netherland, Norway, Singapore and other markets. Also, there was contraction in exports of Made-up fishing nets (HS 56081110) to USA and UAE.

FIBC, Woven Sacks and Woven Fabrics posted strong growth of 11.2% during the month under review led by increase in shipment of FIBC containers (630532) to Europe and Australia, which offset weak demand in USA. Indian exporters have also benefitted from strong orders for Sacks & Bags (39232990) in African countries such as Djibouti, Tanzania, Sudan and Guinea.

Export of **Floor Covering, Leather Cloth and Laminates** declined 19.5% during September 2025 led by contraction in shipment of plastic-coated fabrics (59039090) to USA, Canada and other

destinations. There was also weak demand for PVC floorcovering (39181090) in USA, UAE and other markets.

Export of **FRP and Composites** fell 12.5% in September 2025 because of contraction in order inflows for plastic articles (HS 39269099) from USA, Germany, Canada and other markets .

Export of **Human Hair & Related Products** grew 20% led by healthy growth in shipment of value-added Human Hair (HS 67030010) to China and Viet Nam that together account for 86% of India's exports.

India recorded a 7.2% decline in exports of **Medical Items of Plastics** in September 2025 because of weak demand for Spectacle Lenses (90015000) in UAE, Canada and other markets. Also, there was weak demand for Catheters (90183910) in USA, Lithuania, Ireland, Netherland and other markets.

Miscellaneous Products & Items n.e.s. registered strong growth of 36.6% in September 2025, primarily driven by healthy demand for optical fibre bundles & cables (90011000) to China, Poland and other markets. There was also strong order inflows for PVC Belt Conveyor (39269010) from Canada.

Packaging Items – Flexible and Rigid has registered 5.8% decline in shipments during September 2025 led by fall in export of Sacks and Bags (39232100) to UK and Ireland. Exporters are also facing slack demand for conveyance or packaging materials (39239090) in Thailand and Sierra Leone.

Shipments of **Plastic Films & Sheets** contracted 13.0% in September 2025, mainly due to lower shipment of Flexible plates, sheets of propylene (39202020) to Mexico, Spain, Colombia and other markets. There was also a fall in exports of flexible plates and sheets of PET (39206220) to USA, Italy, Spain, Netherland. Exporters also faced weak demand in USA, UAE, South Africa and other markets for products such as Self-adhesive plates (39199090), Other Plates and Sheets (39219099).

Exports of **Plastic Pipes & Fittings** posted 7.5% contraction during September 2025 because of lower shipments of Other Tubes, Pipes and Hoses of PVC (HS 39172390) to Iraq, Mexico, Libya, Senegal. There was also decline in exports of Flexible Tubes, Pipes and Hoses (39173100) to Sweden, UAE and UK.

Exports of **Plastic Raw Materials** have fallen 8.6% in September 2025 largely because of contraction in shipments of Polypropylene (39021000) to Turkey, Viet Nam, Thailand and other destinations. Also, there was decline in export of Polyethylene Terephthalate (39076190) to USA, UAE, Nepal, Argentina. Export of Other Acrylic Polymers (39069090) declined to Argentina, Bangladesh, South Africa. Exporters also faced weak demand for Rigid Tubes, Pipes and Hoses (39172990) in USA, Italy, Nigeria.

Exports of **Writing Instruments & Stationery** declined significantly by 60% in September 2025. This downturn was primarily due to decreased sales of felt -tipped and other porous-tipped pens and markers (960820). Interestingly, India had witnessed an exceptional surge in exports of this product to France during the same period last year, which explains why this September's exports returned to normal levels.

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

HS Code	Description	Apr 24- Sep-24	Apr 25- Sep 25	Growth
		Values in USD Mn		(%)
63053200	Flexible intermediate bulk containers	441.4	548.0	+24.1%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	264.1	297.0	+12.5%
39269099	Other articles of plastics n.e.s	263.7	249.7	-5.3%
39232990	Other sacks and bags of plastics excl. those of polymers of ethylene	226.8	274.4	+21.0%
39021000	Polypropylene	196.2	135.2	-31.1%
39076190	Other primary form of polyethylene terephthalate	160.2	130.2	-18.7%
48239019	Decorative laminates	159.5	174.7	+9.5%
90011000	Optical fibres, optical fibre bundles and cables	148.8	232.1	+56.0%
39206220	Flexible and plain sheets and film of non-cellular polyethylene terephthalate	135.4	101.7	-24.9%
39269080	Polypropylene articles	125.4	132.0	+5.2%
39069090	Other acrylic polymers, in primary forms	117.7	118.0	+0.3%
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced	118.0	98.9	-16.2%
59039090	Sacks and bags, incl. cones, of polymers of ethylene	106.9	85.5	-20.0%
39232100	Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane	107.9	109.7	+1.6%
39239090	Other articles for the conveyance or packaging of goods, of plastics	104.0	107.8	+3.6%
05010010	Human hair, unworked	85.3	137.4	+61.0%
39014010	Linear low density polyethylene (LLDPE	82.8	60.6	-26.8%
39202090	Films and sheets of non-cellular polymers of ethylene, not reinforced	84.5	78.4	-7.2%
90015000	Spectacle lenses of materials other than glass	82.1	83.3	+1.4%
90183930	Cannulae	69.1	85.5	+23.7%
39012000	Polyethylene with a specific gravity of >= 0,94,	61.8	58.8	-4.7%
39219099	Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	73.2	64.3	-12.1%
96081019	Ball-point pens	70.3	64.6	-8.0%
39199090	Other self-adhesive sheets and film of plastics, whether or not in rolls > 20 cm wide	68.3	55.8	-18.3%
56074900	Twine, cordage, ropes and cables of polyethylene or polypropylene	63.0	58.8	-6.6%
39046100	Polytetrafluoroethylene	63.5	70.4	+10.8%
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	62.4	59.2	-5.2%
39076990	Other primary form of polyethylene terephthalate	63.1	60.4	-4.3%

HS Code	Description	Apr 24- Sep-24	Apr 25- Sep 25	Growth
		Values in USD Mn		(%)
39129090	Other cellulose and chemical derivatives thereof, n.e.s., in primary forms	55.4	67.2	+21.3%
39219094	Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	56.8	51.2	-9.8%
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	54.5	36.9	-32.3%
39046990	Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms	55.1	52.1	-5.4%
39241090	Other tableware and kitchenware, of plastics	49.7	50.0	+0.5%
39206919	Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported	47.3	56.9	+20.2%
39206290	Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported	46.1	41.9	-9.1%
39072990	Other polyethers n.e.s	37.5	51.2	+36.6%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or	46.4	44.9	-3.3%
39095000	Polyurethanes, in primary forms	41.8	43.7	+4.4%
39206929	Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported	47.6	44.7	-6.1%
39204900	Sheets and film of non-cellular polymers of vinyl chloride, containing by weight < 6% of plasticisers, not reinforced	39.6	40.9	+3.3%
96032100	Toothbrushes	35.3	46.8	+32.5%
39119090	Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s.	40.7	46.5	+14.0%
59031090	Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride	38.1	39.8	+4.4%
39219096	Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials	38.2	44.5	+16.5%
39201019	Other sheets and film of non-cellular plastics	38.0	43.5	+14.6%
39235010	Caps and closures for bottles	38.9	35.0	-9.9%
39011090	Other polyethylene with a specific gravity of < 0.94	36.5	44.3	+21.4%
39172390	Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other	35.3	36.4	+3.2%
39076930	PET flake (chip)	32.1	47.2	+46.9%
39241010	Tableware and kitchenware, of plastics: Insulated ware	27.6	35.4	+28.3%

Source: Ministry of Commerce & Industry, Government of India

Exhibit 5: Reasons for major decline in plastic products exports

HS Code	Description	Apr 24- Sep 24	Apr 25 – Sep 25	Reasons for decline
		(USD Mn)		
39021000	Polypropylene	196.2	135.2	Exports have fallen because of shortage of this raw material in the domestic market. India is a net importer of this product because of high domestic demand. Also, there is decline in export orders from Turkey, Viet Nam, Thailand and other markets.
39206220	Flexible and plain sheets and film of non-cellular polyethylene terephthalate	135.4	101.7	There was decline in exports of Flexible and Plain Sheets and Films because of weak demand in USA, Italy, Spain and other markets.
39076190	Other primary form of polyethylene terephthalate	160.2	130.2	Exports have declined because of high demand for this raw material in the domestic market. exports have fallen also because of slowdown in orders from USA, UAE and other top markets
39014010	Linear low-density polyethylene (LLDPE)	82.8	60.6	Exports have declined because of domestic shortage of this raw material. India is a net importer as domestic production is not sufficient to meet local demand. Also, there is weak demand in prominent markets such as China, Viet Nam and Bangladesh.
59039090	Sacks and bags, incl. cones, of polymers of ethylene	106.9	85.5	Fall in exports of plastic-coated textile is led by decline in export orders from USA, Canada, South Africa and other markets
39202020	Flexible and plain sheets and film of non-cellular polymers of propylene, not reinforced	118	98.9	Decline in shipment of plastic sheets and film was led by weak demand in Mexico, Spain, Colombia and other key markets
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 PVC	54.5	36.9	Exports have fallen largely because of slowdown in orders from USA, which is the topmost market for this product. Also, tepid demand in UAE, Saudi Arabia and Nepal have contributed to fall in exports in this product.

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

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