

ANALYSIS OF INDIA'S PLASTICS EXPORT

AUGUST 2020



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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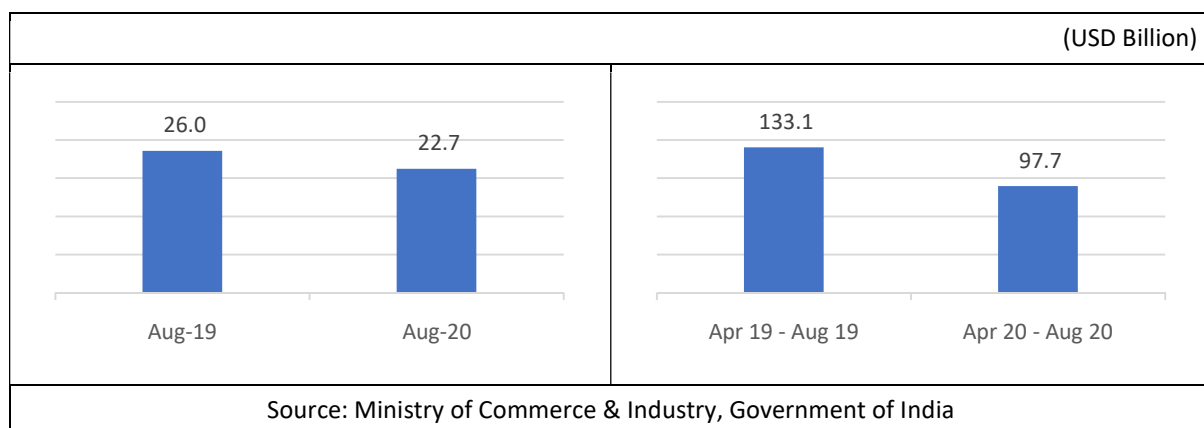
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Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India on September 22, 2020

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 22.7 billion in August 2020, down 12.7% from USD 26.0 billion in August 2019. Cumulative value of merchandise exports during April 2020 – August 2020 was USD 97.7 billion as against USD 133.1 billion during the same period last year, reflecting a decline of 26.7%.

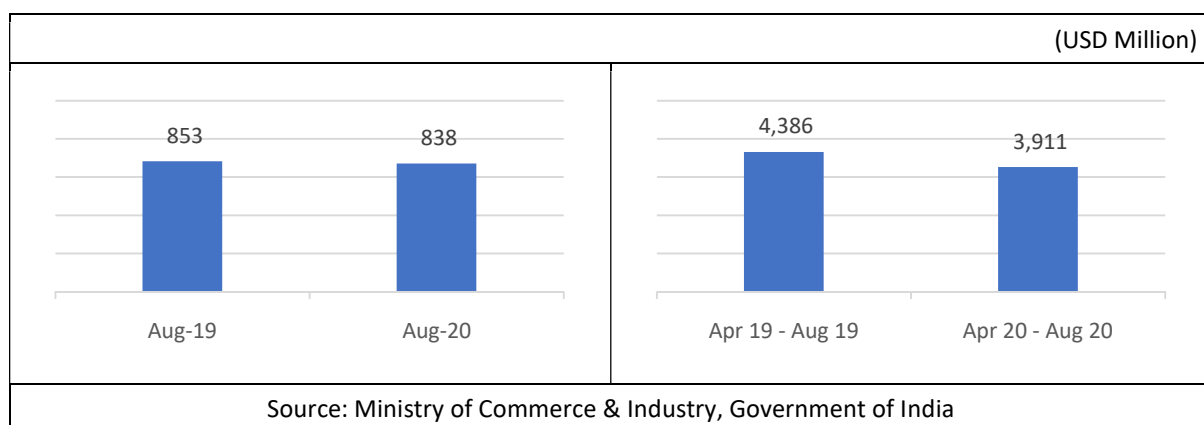
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During August 2020, India exported plastics worth USD 838 million, down 1.8% from USD 853 million in August 2019. Cumulative value of plastics export during April 2020 – August 2020 was USD 3,911 million as against USD 4,386 million during the same period last year, registering a negative growth of 10.8%.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In August 2020, five product panels, namely, Polyester films; Raw materials; Floor coverings, leather cloth & laminates; Pipes & fittings; and Human hair witnessed a positive growth in exports. The remaining panels were unable to surpass their shipments as reported in August 2019.

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

Panel	Aug-19	Aug-20	Growth	Apr 19- Aug 19	Apr 20- Aug 20	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Consumer & House ware	50.1	45.1	-10.0%	249.3	158.7	-36.3%
Cordage & Fishnets	13.8	13.5	-2.0%	69.3	58.6	-15.5%
Composites / FRP products	27.5	23.8	-13.5%	139.7	95.0	-32.0%
Floor Coverings, Leather cloth & Laminates	31.6	35.9	+13.6%	187.3	145.1	-22.6%
Human Hair & Related Products	17.8	29.4	+65.0%	110.0	103.5	-5.9%
Miscellaneous Products	131.5	122.9	-6.6%	694.9	510.1	-26.6%
Pipes & Fittings	16.6	17.4	+4.9%	80.1	61.7	-22.9%
Polyester Films	124.1	132.4	+6.6%	634.9	658.7	+3.8%
Raw Materials	299.8	309.4	+3.2%	1,567.3	1,678.3	+7.1%
Rigid Packaging & PET Preforms	29.5	25.3	-14.2%	136.8	121.2	-11.4%
Woven Sacks / FIBCs	94.3	68.9	-27.0%	429.8	265.6	-38.2%
Writing Instruments	16.4	14.1	-14.3%	86.8	54.0	-37.9%
	853.1	838.0	-1.8%	4,386.2	3,910.6	-10.8%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & house ware** products fell by 10.0% in August 2020. Major decline was witnessed in sales of Plastic moulded suit cases (HS code 42021220) to the United States and Belgium, and that of Plastic toothbrushes (HS code 96032100) to Brazil, Germany, United Arab Emirates, and the United States among others.

Cordage & fishnets export witnessed a minor decline of 2.0% in August 2020 on account of lower sales of Twine, cordage, rope and cables (HS code 56079090) to the United States and the United Arab Emirates.

Export of **Composites** fell by 13.5% due to lower sales of Articles of plastics and articles of other materials of heading 3901 to 3914, nes (HS code 39269099).

In case of **Floor coverings, leather cloth & laminates**, exports in August 2020 were up 13.6% due to increased sales of Textile fabrics impregnated, coated, covered or laminated with plastics other than PVC or PU: Other (HS code 59039090) to the United States.

Export of **Human hair & related products** gained momentum and grew by 65.0% due to strong sales of Human hair, dressed, thinned, bleached or otherwise worked (HS code 67030010) to China.

Miscellaneous products export fell by 6.6% in August 2020 due to decline in sales of Optical fibres, optical fibre bundles and cables (HS code 90011000); Other sacks and bags, of plastics (HS code 39232990); and Safety headgear (HS code 65061090).

Export of **Pipes & fittings** witnessed a growth of 4.9% due to improved sales of Rigid tubes, pipes and hoses, and fittings thereof, of PVC: Other (HS code 39172390) to Senegal, Egypt and Saudi Arabia; and that of Other rigid tubes, pipes and hoses (HS code 39172990) to Italy in particular.

Polyester films continued its positive streak with exports witnessing a rise of 6.6% in August 2020 on the back of strong growth in shipments of Other self-adhesive plates, sheets, film, foil, tape, strip, of plastics (HS code 39199090); BOPP sheets and films (HS code 39202020); Metallised flexible sheets and films (HS code 39219094); and Flexible, laminated plates, sheets, film, foil and strip, of plastic (HS Code 39219096).

Plastics raw materials also remained in the positive growth territory in August 2020 due to higher export of Polypropylene (HS code 39021000) to China. It may be noted that Polypropylene exports to China during April 2020 – August 2020 stood at USD 217.1 million as against USD 37.3 million during the same period last year, registering a record growth of 482.9%.

Rigid packaging & pet performs export dropped by 14.2% due to lower sales of Other articles for the conveyance or packing of goods, of plastics (HS code 39239090) to Bangladesh, Japan and the United Arab Emirates.

Export of **Woven sacks and FIBCs** fell by 27.0% during August 2020 due to decline in sales of Flexible intermediate bulk containers or FIBCs (HS code 63053200). Indian exporters of this product have been denied MEIS / RoDTEP since August 2019 which is hurting their export competitiveness in the Global market.

Export of **Writing instruments** slipped by 14.3% in August 2020, mainly on account of a decline in sales of Ball-point pens (HS code 96081019) to the United Arab Emirates, Kenya, Thailand, Brazil and Nepal.

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

HS Code	Description	Apr 19- Aug 19	Apr 20- Aug 20	Growth
		(USD Mn)	(USD Mn)	(%)
39076100	Polyethylene terephthalate: having a viscosity number of 78 ml/g or higher	331.4	-	NM
63053200	Flexible intermediate bulk containers	292.2	217.0	-25.7%
39021000	Polypropylene, in primary forms	198.9	393.1	+97.6%
39012000	Polyethylene with a specific gravity of >= 0.94	200.9	181.7	-9.6%
39232990	Sacks and bags, incl. cones, of plastics (excl. those of polymers of ethylene): Other	153.0	123.3	-19.4%
39011010	Linear low density polyethylene (LLDPE)	162.9	66.0	-59.5%
39269099	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	138.0	93.3	-32.4%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	104.1	99.4	-4.5%
90011000	Optical fibres, optical fibre bundles and cables (excl. made-up of individually sheathed fibres of heading 8544)	115.2	78.4	-32.0%
48239019	Decorative laminates	84.2	66.2	-21.3%
39206220	Plates, sheets, film, foil and strip, of non-cellular polyethylene terephthalate, not reinforced, laminated, supported or similarly combined with other materials, without backing, unworked or merely surface-worked or merely cut into squares or rectangles (excl. those of polymethyl methacrylate, self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Flexible , plain	89.9	96.6	+7.4%
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	53.2	33.0	-38.0%
39269080	Polypropylene articles , not elsewhere	71.4	63.4	-11.3%
39232100	Sacks and bags, incl. cones, of polymers of ethylene	66.2	54.9	-17.0%
39076990	Other, polyethylene terephthalate	86.3	64.9	-24.8%
39239090	Articles for the conveyance or packaging of goods, of plastics (excl. boxes, cases, crates and similar articles; sacks and bags, incl. cones; carboys, bottles, flasks and similar articles; spools, spindles, bobbins and similar supports; stoppers, lids, caps and other closures): Other	63.6	55.7	-12.5%
39219099	Plates, sheets, film, foil and strip, of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked or merely surface-worked or merely cut into squares or rectangles (excl. of cellular plastic; self-adhesive products, floor, wall and ceiling coverings of heading 3918): Other	75.4	44.1	-41.6%
39202020	Plates, sheets, film, foil and strip, of non-cellular polymers of ethylene, not reinforced, laminated, supported or similarly combined with other materials, without backing, unworked or merely surface-worked or merely cut into squares or rectangles (excl. self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Flexible , plain	59.9	96.0	+60.4%

HS Code	Description	Apr 19- Aug 19	Apr 20- Aug 20	Growth
		(USD Mn)	(USD Mn)	(%)
39011090	Polyethylene with a specific gravity of < 0.94: Other	62.1	19.3	-68.9%
54072030	Woven fabrics of strip or the like, of synthetic filament, incl. monofilament of >= 67 decitex and with a cross sectional dimension of <= 1 mm: Dyed	59.5	8.3	-86.1%
90015000	Spectacle lenses of materials other than glass	58.9	41.4	-29.7%
96081019	Ball-point pens	52.8	32.3	-38.8%
39202090	Plates, sheets, film, foil and strip, of non-cellular polymers of ethylene, not reinforced, laminated, supported or similarly combined with other materials, without backing, unworked or merely surface-worked or merely cut into squares or rectangles (excl. self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Other	51.5	45.6	-11.5%
39046100	Polytetrafluoroethylene, in primary forms	50.1	39.0	-22.2%
90183930	Cannulae	38.8	36.9	-4.9%
39241090	Tableware and kitchenware, of plastics: Other	40.7	25.3	-37.9%
96032100	Tooth brushes, incl. dental-plate brushes	34.8	23.8	-31.7%
39069090	Acrylic polymers, in primary forms (excl. polymethyl methacrylate): Other	35.4	34.1	-3.6%
39206290	Plates, sheets, film, foil and strip, of non-cellular polyethylene terephthalate, not reinforced, laminated, supported or similarly combined with other materials, without backing, unworked or merely surface-worked or merely cut into squares or rectangles (excl. those of polymethyl methacrylate, self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Other	34.0	44.7	+31.4%
95030030	Tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages; dolls; other toys; reduced-size ("scale") models and similar recreational models, working or not; puzzles of all kinds: tricycles, scooters, pedal cars and similar wheeled toys; dolls' carriages; dolls; other toys; reduced-size ("scale") models and similar recreational models, working or not; puzzles of all kinds: of plastics	32.5	26.3	-19.2%
56074900	Twine, cordage, ropes and cables of polyethylene or polypropylene, whether or not plaited or braided and whether or not impregnated, coated, covered or sheathed with rubber or plastics	31.2	27.0	-13.4%
59031090	Textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride (excl. wall coverings of textile materials impregnated or covered with polyvinyl chloride; floor coverings consisting of a textile backing and a top layer or covering of polyvinyl chloride): Other	30.7	17.8	-42.1%
39206919	Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported or similarly combined with other materials, not worked or only surface-worked, or only cut to rectangular, incl. square, shapes (excl. polycarbonates, polyethylene terephthalate and other unsaturated polyesters, self-adhesive products, and floor, wall and ceiling coverings in heading 3918): Other	31.8	30.3	-4.7%

HS Code	Description	Apr 19- Aug 19	Apr 20- Aug 20	Growth
		(USD Mn)	(USD Mn)	(%)
59039090	Textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane (excl. tyre cord fabric of high tenacity yarn of nylon or other polyamides, polyesters or viscose rayon; wall coverings of textile materials impregnated or covered with plastic; floor coverings consisting of a textile backing and a top layer or covering of plastics): Other	21.4	43.5	+102.8%
39204900	Plates, sheets, film, foil and strip, of non-cellular polymers of vinyl chloride, containing by weight < 6% of plasticisers, not reinforced, laminated, supported or similarly combined with other materials, without backing, unworked or merely surface-worked or merely cut into squares or rectangles (excl. self-adhesive products, and floor, wall and ceiling coverings of heading 3918)	34.1	24.0	-29.8%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation	30.0	26.9	-10.3%
39219094	Plates, sheets, film, foil and strip, of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked or merely surface-worked or merely cut into squares or rectangles (excl. of cellular plastic; self-adhesive products, floor, wall and ceiling coverings of heading 3918): Flexible , metallised	27.0	34.6	+28.2%
39219096	Plates, sheets, film, foil and strip, of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked or merely surface-worked or merely cut into squares or rectangles (excl. of cellular plastic; self-adhesive products, floor, wall and ceiling coverings of heading 3918): Flexible , laminated	25.5	43.0	+68.8%
39199090	Self-adhesive plates, sheets, film, foil, tape, strip and other flat shapes, of plastics, whether or not in rolls > 20 cm wide (excl. floor, wall and ceiling coverings of heading 3918): Other	30.6	36.6	+19.8%
39072090	Polyethers, in primary forms (excl. polyacetals): Other	14.6	36.7	+150.8%
39241010	Insulated ware of plastics	22.0	13.8	-37.4%
39073010	Epoxy resins	28.2	13.6	-51.7%
39259090	Building elements for the manufacture of floors, walls, partition walls, ceilings, roofs, etc., of plastic; gutters and accessories of plastic; railings, fences and similar barriers, of plastic; large shelves, for assembly and permanent installation in shops, workshops, etc., of plastic; architectural ornaments, e.g. friezes, of plastic; fittings and similar products for permanent mounting on buildings, of plastic: Other	40.2	8.8	-78.2%
39095000	Polyurethanes, in primary forms	22.6	22.4	-0.9%
39100090	Silicones in primary forms: Other	25.4	14.3	-43.5%
39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	20.0	18.7	-6.4%

HS Code	Description	Apr 19- Aug 19	Apr 20- Aug 20	Growth
		(USD Mn)	(USD Mn)	(%)
39129090	Cellulose and chemical derivatives thereof, n.e.s., in primary forms (excl. cellulose acetates, cellulose nitrates and cellulose ethers): Other	22.5	22.5	+0.3%
39119090	Polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s., in primary forms: Other	22.3	20.4	-8.5%
39031990	Polystyrene, in primary forms (excl. expansible): Other	23.8	15.0	-36.9%
39269069	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	19.8	10.5	-47.2%

Source: Ministry of Commerce & Industry, Government of India

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