

ANALYSIS OF INDIA'S PLASTICS EXPORT

DECEMBER 2020



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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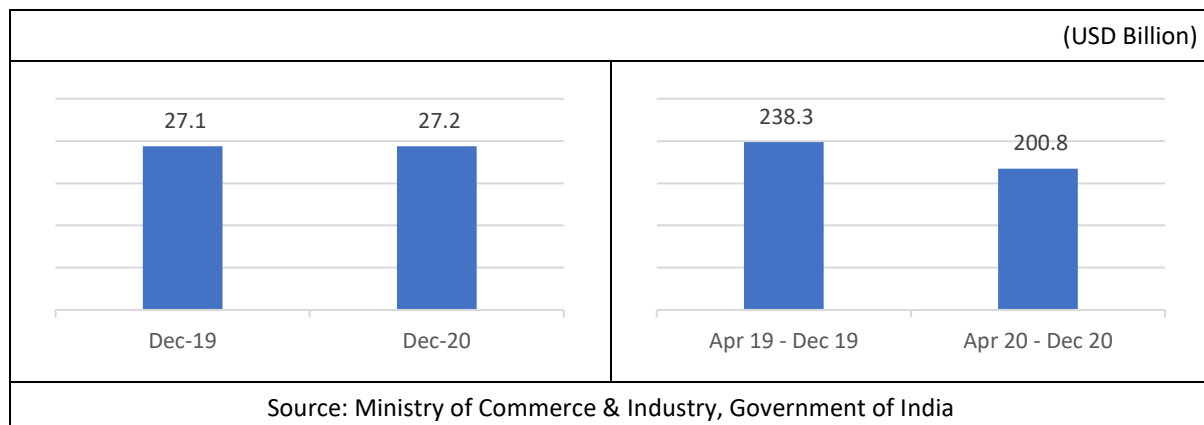
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Disclaimer: This report has been prepared on the basis of export data sourced from the Ministry of Commerce & Industry, Government of India.

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 27.2 billion in December 2020, up 0.1% from USD 27.1 billion in December 2019. Cumulative value of merchandise exports during April 2020 – December 2020 was USD 200.8 billion as against USD 238.3 billion during the same period last year, reflecting a decline of 15.7%.

Exhibit 1: Trend in overall merchandise exports from India

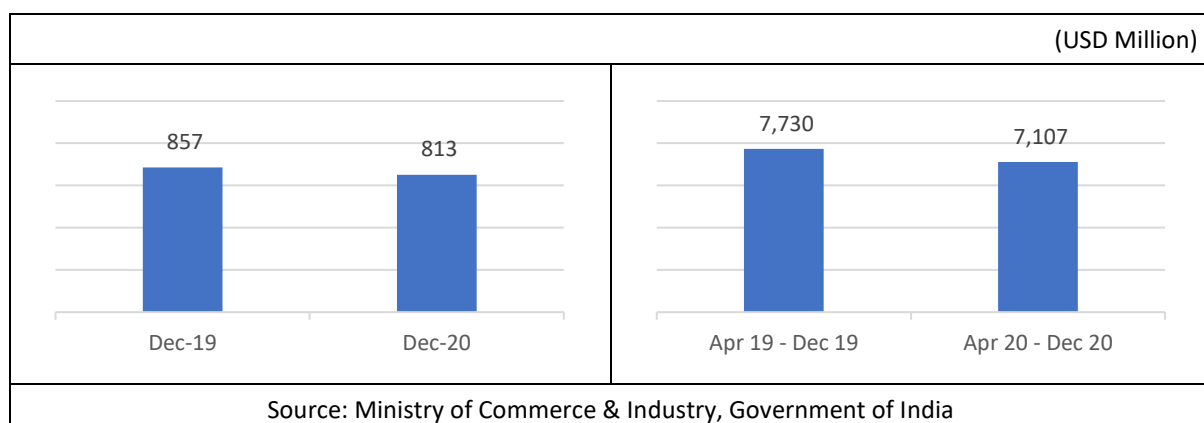


TREND IN PLASTICS EXPORT

During December 2020, India exported plastics worth USD 813 million, down 5.2% from USD 857 million in December 2019. Cumulative value of plastics export during April 2020 – December 2020 was USD 7,107 million as against USD 7,730 million during the same period last year, registering a negative growth of 8.1%.

Indian exporters continue to face problems of shortage of containers and increased freight rate. There is an unprecedented backlog in exports as goods are either in transit or waiting shipment at the ports which is leading to longer lead times to service the orders. The exporters are facing major challenges due to the above along with elevated prices of plastics raw material and problems in applying for RoDTEP – the rates of which are not yet known.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In December 2020, seven of the product panels, namely, Cordage & fishnets; Composites / FRP products; Floor Coverings, leathercloth & laminates; Human hair; Pipes & fittings; Polyester films; and Miscellaneous products witnessed a positive growth in exports. The remaining panels, particularly, Raw materials and Writing instruments, reported lower exports.

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

Panel	Dec-19	Dec -20	Growth	Apr 19- Dec 19	Apr 20- Dec 20	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Consumer & House ware	50.5	50.0	-1.0%	447.8	360.2	-19.6%
Cordage & Fishnets	14.9	16.6	+11.4%	126.3	122.4	-3.0%
Composites / FRP products	31.2	32.7	+4.8%	251.4	210.1	-16.4%
Floor Coverings, Leather cloth & Laminates	40.1	55.5	+38.3%	325.4	332.7	+2.2%
Human Hair & Related Products	30.2	48.2	+59.7%	213.6	264.6	+23.9%
Miscellaneous Products	131.1	152.4	+16.3%	1,190.8	1,064.6	-10.6%
Pipes & Fittings	16.6	16.9	+2.1%	140.4	128.9	-8.2%
Polyester Films	117.1	123.6	+5.6%	1,112.0	1,126.1	+1.3%
Raw Materials	266.0	187.6	-29.5%	2,721.3	2,565.3	-5.7%
Rigid Packaging & PET Preforms	29.0	27.0	-7.1%	250.9	234.2	-6.6%
Woven Sacks / FIBCs	110.8	89.0	-19.7%	793.9	592.3	-25.4%
Writing Instruments	19.8	13.5	-31.8%	155.8	105.2	-32.5%
	857.2	812.9	-5.2%	7,729.5	7,106.6	-8.1%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & house ware** products fell by 1.0% in December 2020 as an increase in shipment of Other household articles and toilet articles, of plastics (HS code 39249010 and 39249090), Tableware and kitchenware of plastics (HS code 39241090), and Electrical switches, of plastics (HS code 85365020) was more than offset by a decline in sales of Plastic moulded suit cases (HS code 42021220).

Cordage & fishnets export witnessed a rise of 11.4% in December 2020 on account of higher sales of Other made-up fishing nets (HS code 56081190) to United Kingdom, Iceland, and Norway; and of Twine, cordage, ropes and cables of polyethylene or polypropylene (HS code 56074900) to Ghana and the United States.

Export of **Composites** was up by 4.8% due to increased sales of Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s (HS code 39269099).

In case of **Floor coverings, leather cloth & laminates**, exports in December 2020 were up 38.3% 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 of America; Textile fabrics impregnated, coated, covered or laminated with polyurethane (HS code 59032090) to South Africa; and Decorative laminates (HS code 48239019) to Egypt, Saudi Arabia, and Israel.

Export of **Human hair & related products** clocked an impressive 59.7% growth due to strong sales of Human hair, dressed, thinned, bleached or otherwise worked (HS code 67030010) to China. During December 2020, India also exported more of Human hair, unworked (HS code 05010010) to Myanmar.

Miscellaneous products export increased by 16.3% in December 2020 due to higher sales of Other sacks and bags, incl. cones, of plastics (HS code 39232990) to Djibouti and United States of America; Safety headgear (HS code 65061090) to Chile; along with improved shipments of Polypropylene articles, nes (HS code 39269080) to the United States of America.

Export of **Pipes & fittings** witnessed a growth of 2.1% due to improved sales of Flexible tubes, pipes and hoses, and fittings therefor, of plastics (HS code 39173100); Flexible tubes, pipes and hoses of plastics, without fittings (HS code 39173290); Flexible tubes, pipes and hoses of plastics, with fittings, seals or connectors (HS code 39173300); Flexible tubes, pipes and hoses, and fittings, of plastics, reinforced or otherwise combined with other materials (HS code 39173990); and Joints, elbows, flanges, of plastics (HS code 39174000).

Polyester films witnessed an increase of 5.6% in exports in December 2020 due to higher shipments of a variety of products including BOPET sheets and films, flexible plain (HS code 39206220); Flexible and laminated plates, sheets, film, foil and strip of plastics (HS code 39219026); Plates, sheets, film, foil and strip, of cellular polymers of vinyl chloride (HS code 39211200); Plates, sheets, film, foil and strip, of non-cellular polyesters (HS code 39206939); Plates, sheets, film, foil and strip, of non-cellular plastics (HS code 39209919); Rigid and plain plates, sheets, film, foil and strip, of non-cellular polycarbonates (HS code 39206110); and Plates, sheets, film, foil and strip, of cellular plastic (HS code 39211900).

Plastics raw materials export fell by 29.5% in December 2020 due to lower shipments of Linear low-density polyethylene (HS code 39011010); Polyethylene having a specific gravity of 0.94 or more (HS code 39012000); and Polypropylene (HS code 39021000) to China in particular. India had exported large volumes of Plastics raw materials in April and May 2020 due to low domestic demand.

Rigid packaging & PET performs export was lower by 7.1% due to reduced sales of Other articles for the conveyance or packaging of goods, of plastics (HS code 39239090) to Bangladesh, Japan and the United Arab Emirates.

Export of **Woven sacks and FIBCs** fell by 19.7% during December 2020 due to decline in sales of Woven fabrics obtained from strip or the like (HS code 54072030 and 54072090). Exports of FIBC (HS code 63053200) have rebounded strongly in the third quarter of 2020-21.

Export of **Writing instruments** slipped by 31.8% in December 2020, mainly on account of a decline in sales of Ball-point pens with liquid ink (HS code 96081019) across the major export destinations.

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

HS Code	Description	Apr 19- Dec 19	Apr 20- Dec 20	Growth
		(USD Mn)	(USD Mn)	(%)
39076100	Polyethylene terephthalate: having a viscosity number of 78 ml/g or higher	573.8	-	NM
63053200	Flexible intermediate bulk containers	521.3	476.8	-8.5%
39021000	Polypropylene, in primary forms	393.0	549.5	+39.8%
39012000	Polyethylene with a specific gravity of >= 0.94	339.5	254.7	-25.0%
39232990	Sacks and bags, incl. cones, of plastics (excl. those of polymers of ethylene): Other	283.1	263.9	-6.8%
39011010	Linear low-density polyethylene (LLDPE)	270.3	94.6	-65.0%
39269099	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	247.6	206.9	-16.4%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	205.3	250.8	+22.2%
90011000	Optical fibres, optical fibre bundles and cables (excl. made-up of individually sheathed fibres of heading 8544)	179.6	151.8	-15.5%
48239019	Decorative laminates	154.9	145.8	-5.9%
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	160.4	153.7	-4.1%
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	115.1	70.4	-38.9%
39269080	Polypropylene articles, not elsewhere	129.9	134.2	+3.3%
39232100	Sacks and bags, incl. cones, of polymers of ethylene	121.4	113.5	-6.5%
39076990	Other, polyethylene terephthalate	118.2	103.2	-12.7%
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	117.6	104.3	-11.3%
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	125.1	75.8	-39.4%
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	113.1	141.1	+24.8%

HS Code	Description	Apr 19- Dec 19	Apr 20- Dec 20	Growth
		(USD Mn)	(USD Mn)	(%)
39011090	Polyethylene with a specific gravity of < 0.94: Other	122.4	36.4	-70.3%
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	106.3	29.6	-72.2%
90015000	Spectacle lenses of materials other than glass	103.0	86.0	-16.4%
96081019	Ball-point pens	93.8	62.4	-33.4%
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	90.9	84.2	-7.4%
39046100	Polytetrafluoroethylene, in primary forms	79.9	69.7	-12.9%
90183930	Cannulae	70.9	71.2	+0.4%
39241090	Tableware and kitchenware, of plastics: Other	69.6	58.6	-15.9%
96032100	Tooth brushes, incl. dental-plate brushes	64.6	48.1	-25.5%
39069090	Acrylic polymers, in primary forms (excl. polymethyl methacrylate): Other	63.4	76.8	+21.2%
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	61.5	75.4	+22.7%
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	64.3	59.2	-7.9%
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	57.9	55.5	-4.2%
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	55.5	46.6	-16.0%
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	59.6	54.3	-8.9%

HS Code	Description	Apr 19- Dec 19	Apr 20- Dec 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	47.5	100.6	+111.8%
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)	53.4	42.5	-20.3%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation	51.7	48.4	-6.4%
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	50.3	58.5	+16.3%
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	47.1	68.4	+45.2%
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	50.2	56.5	+12.5%
39072090	Polyethers, in primary forms (excl. polyacetals): Other	42.9	65.6	+52.7%
39241010	Insulated ware of plastics	41.2	36.1	-12.4%
39073010	Epoxy resins	47.8	29.6	-38.2%
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	49.5	18.3	-63.1%
39095000	Polyurethanes, in primary forms	41.7	41.8	+0.1%
39100090	Silicones in primary forms: Other	41.7	28.1	-32.7%
39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	36.7	38.0	+3.4%

HS Code	Description	Apr 19- Dec 19	Apr 20- Dec 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	39.5	42.4	+7.4%
39119090	Polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s., in primary forms: Other	35.8	40.5	+13.1%
39031990	Polystyrene, in primary forms (excl. expansible): Other	42.7	21.4	-49.8%
39269069	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	35.0	24.2	-30.6%

Source: Ministry of Commerce & Industry, Government of India

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