

ANALYSIS OF INDIA'S PLASTICS EXPORT

JULY 2020



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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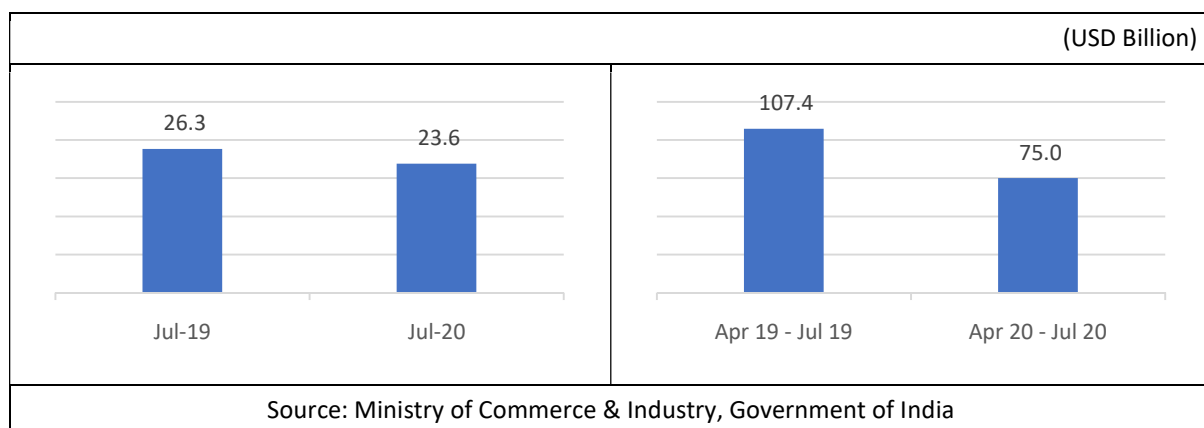
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Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India on August 20, 2020

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 23.6 billion in July 2020, down 10.2% from USD 26.3 billion in July 2019. Cumulative value of merchandise exports during April 2020 – July 2020 was USD 75.0 billion as against USD 107.4 billion during the same period last year, reflecting a decline of 30.2%.

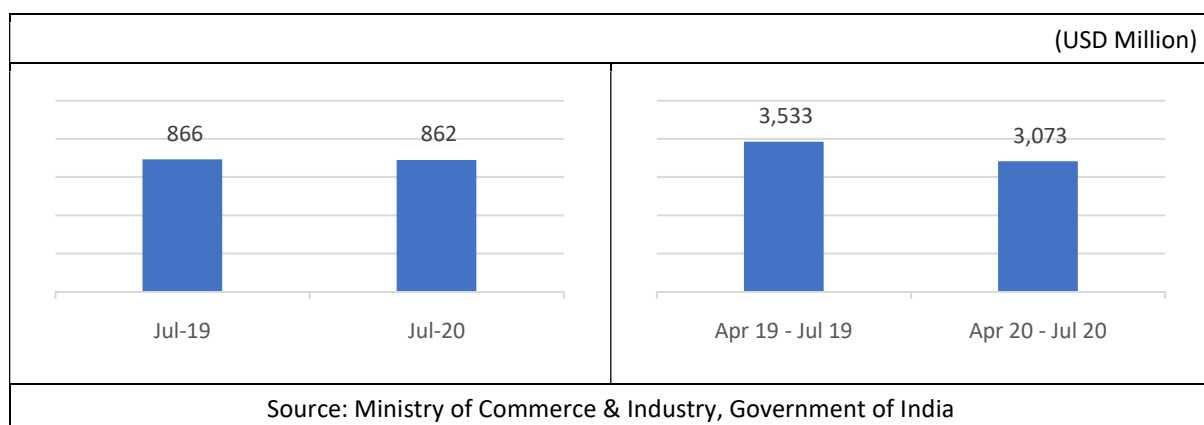
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During July 2020, India exported plastics worth USD 862 million, down 0.5% from USD 866 million in July 2019. Cumulative value of plastics export during April 2020 – July 2020 was USD 3,073 million as against USD 3,533 million during the same period last year, registering a negative growth of 13.0%.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In July 2020, as many as seven product panels, namely, Polyester films; Raw materials; Floor coverings, leather cloth & laminates; Pipes & fittings; Rigid packaging & PET preforms; Cordage & fishnets; and Human hair witnessed a positive growth in exports. Among the remaining panels, particularly Woven sacks / FIBCs had a very difficult month in July 2020.

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

Panel	Jul-19	Jul-20	Growth	Apr 19- Jul 19	Apr 20- Jul 20	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Consumer & House ware	49.9	44.8	-10.3%	199.2	113.6	-43.0%
Cordage & Fishnets	14.9	16.0	+7.4%	55.5	45.1	-18.8%
Composites / FRP products	29.6	25.3	-14.7%	112.3	71.3	-36.5%
Floor Coverings, Leather cloth & Laminates	33.7	36.9	+9.4%	155.7	109.1	-29.9%
Human Hair & Related Products	20.9	26.1	+25.2%	92.3	74.2	-19.6%
Miscellaneous Products	136.4	128.0	-6.2%	563.3	387.2	-31.3%
Pipes & Fittings	14.9	17.8	+19.2%	63.5	44.4	-30.2%
Polyester Films	123.5	142.2	+15.1%	510.7	526.3	+3.1%
Raw Materials	297.6	307.7	+3.4%	1,267.5	1,369.0	+8.0%
Rigid Packaging & PET Preforms	30.2	32.1	+6.2%	107.3	95.9	-10.6%
Woven Sacks / FIBCs	97.1	68.4	-29.5%	335.5	196.8	-41.4%
Writing Instruments	17.5	16.8	-3.9%	70.4	39.9	-43.4%
	866.1	861.9	-0.5%	3,533.2	3,072.6	-13.0%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & house ware** products fell by 10.3% in July 2020. Major decline was witnessed in sales of Plastic moulded suit cases (HS code 42021220) to United States and Belgium, and that of Tableware and kitchenware of plastic (HS code 39241090) to China.

Cordage & fishnets continued its upward trend and witnessed 7.4% growth in July 2020 on account of improved export of Made up knotted fishing nets of man-made textile materials other than nylon (HS code 56081190) to Canada in particular.

Export of **Composites** fell by 14.7% 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 July 2020 were up 9.4% 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.

Human hair & related products finally turned the corner and grew by 25.2% as exporters were able to finally make speedy shipments of Human hair, dressed, thinned, bleached or otherwise worked (HS code 67030010) to China.

Export of **Pipes & fittings** witnessed a growth of 19.2% due to higher sales of products like Other rigid tubes, pipes and hoses (HS code 39172990); Other tubes, pipes and hoses, not reinforced or otherwise combined with other materials (HS Code 39173300); Rigid tubes, pipes and hoses, and fittings thereof, of PVC: Other (HS code 39172390); Tubes of

polyethylene (HS code 39172110); and Flexible tubes, pipes and hoses, and fittings thereof, of plastics, reinforced or otherwise combined with other materials: Other (HS code 39173990).

Polyester films continued its stellar performance with exports witnessing a rise of 15.1% in July 2020 on the back of strong growth in sales of Flexible, laminated plates, sheets, film, foil and strip, of plastic (HS Code 39219096); Other self-adhesive plates, sheets, film, foil, tape, strip and other flat shapes, of plastics (HS Code 39199090); Other plates, sheets, film, foil and strip, of Polyethylene Terephthalate, non-cellular and not reinforced (HS Code 39206290); and Rigid plates, sheets, film, foil and strip, of Polycarbonates, non-cellular and not reinforced (HS Code 39206110).

Plastics raw materials returned to their positive territory in July 2020 due to higher export of Polypropylene (HS code 39021000) and Propylene copolymers (HS code 39023000) to China; and increased sales of Other Polyethers (HS code 39072090) to Singapore.

Rigid packaging & pet performs reported a positive growth of 6.2% due to higher export of Caps and closures of plastics (HS code 39235010), Box case crate of plastics nes (HS code 39231090); and Other articles for the conveyance or packing of goods, of plastics (HS code 39239090).

Export of **Woven sacks and fibcs** fell by 29.5% during July 2020 due to a huge decline in sales of FIBC to European countries like Spain, Netherlands, and Germany etc. Indian FIBC exporters have been denied MEIS / RoDTEP since August 2019 which is hurting their export competitiveness in the Global market.

Further, it is important to mention that the online system for exporters to apply for availing tax incentives under the MEIS scheme has been blocked since 23rd July, 2020 which is severely impacting the exporter's community in the country.

Export of **Writing instruments** slipped by 3.9%, mainly on account of a decline in sales of Ball-point pens (HS code 96081019) to the UAE and Algeria in July 2020.

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

HS Code	Description	Apr 19- Jul 19	Apr 20- Jul 20	Growth
		(USD Mn)	(USD Mn)	(%)
39076100	Polyethylene terephthalate): having a viscosity number of 78 ml/g or higher	267.6	-	NM
63053200	Flexible intermediate bulk containers	230.9	161.2	-30.2%
39021000	Polypropylene, in primary forms	160.5	324.9	+102.4%
39012000	Polyethylene with a specific gravity of >= 0.94	164.2	150.6	-8.3%
39232990	Sacks and bags, incl. cones, of plastics (excl. those of polymers of ethylene): Other	120.5	93.4	-22.5%
39011010	Linear low density polyethylene (LLDPE)	134.5	50.9	-62.1%
39269099	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	110.9	70.3	-36.7%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	87.4	71.2	-18.5%
90011000	Optical fibres, optical fibre bundles and cables (excl. made-up of individually sheathed fibres of heading 8544)	93.0	58.7	-36.8%
48239019	Decorative laminates	66.0	49.8	-24.6%
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	71.7	81.4	+13.5%
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	44.3	24.9	-43.9%
39269080	Polypropylene articles , not elsewhere	57.4	48.3	-15.9%
39232100	Sacks and bags, incl. cones, of polymers of ethylene	52.3	41.6	-20.5%
39076990	Other, polyethylene terephthalate	72.4	51.3	-29.1%
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	49.3	44.1	-10.5%
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	60.5	36.0	-40.5%
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	48.2	80.4	+66.6%

HS Code	Description	Apr 19- Jul 19	Apr 20- Jul 20	Growth
		(USD Mn)	(USD Mn)	(%)
39011090	Polyethylene with a specific gravity of < 0.94: Other	47.6	16.1	-66.2%
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	41.5	5.2	-87.5%
90015000	Spectacle lenses of materials other than glass	48.4	30.3	-37.3%
96081019	Ball-point pens	42.4	24.2	-43.0%
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	41.0	37.1	-9.6%
39046100	Polytetrafluoroethylene, in primary forms	41.9	31.6	-24.5%
90183930	Cannulae	30.7	28.3	-7.9%
39241090	Tableware and kitchenware, of plastics: Other	32.3	17.8	-44.9%
96032100	Tooth brushes, incl. dental-plate brushes	28.4	18.5	-34.9%
39069090	Acrylic polymers, in primary forms (excl. polymethyl methacrylate): Other	27.8	24.9	-10.5%
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	25.9	36.5	+40.9%
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	24.1	17.6	-26.9%
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	24.9	20.6	-16.9%
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	25.4	13.0	-48.6%
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	25.2	24.6	-2.4%

HS Code	Description	Apr 19- Jul 19	Apr 20- Jul 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	17.2	31.6	+83.6%
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)	29.1	18.1	-37.8%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation	23.1	21.1	-8.7%
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	22.3	27.3	+22.6%
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	19.8	35.3	+78.7%
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	25.9	24.7	-4.7%
39072090	Polyethers, in primary forms (excl. polyacetals): Other	10.7	28.2	+163.3%
39241010	Insulated ware of plastics	18.1	9.2	-48.9%
39073010	Epoxy resins	23.1	10.4	-55.0%
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	37.7	6.7	-82.1%
39095000	Polyurethanes, in primary forms	17.9	18.1	+0.9%
39100090	Silicones in primary forms: Other	20.7	12.3	-40.5%
39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	15.8	14.9	-5.7%

HS Code	Description	Apr 19- Jul 19	Apr 20- Jul 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	18.1	17.9	-1.5%
39119090	Polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s., in primary forms: Other	17.8	15.6	-12.3%
39031990	Polystyrene, in primary forms (excl. expansible): Other	19.7	13.0	-34.2%
39269069	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	15.8	7.4	-52.9%

Source: Ministry of Commerce & Industry, Government of India

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