

ANALYSIS OF INDIA'S PLASTICS EXPORT

JUNE 2019



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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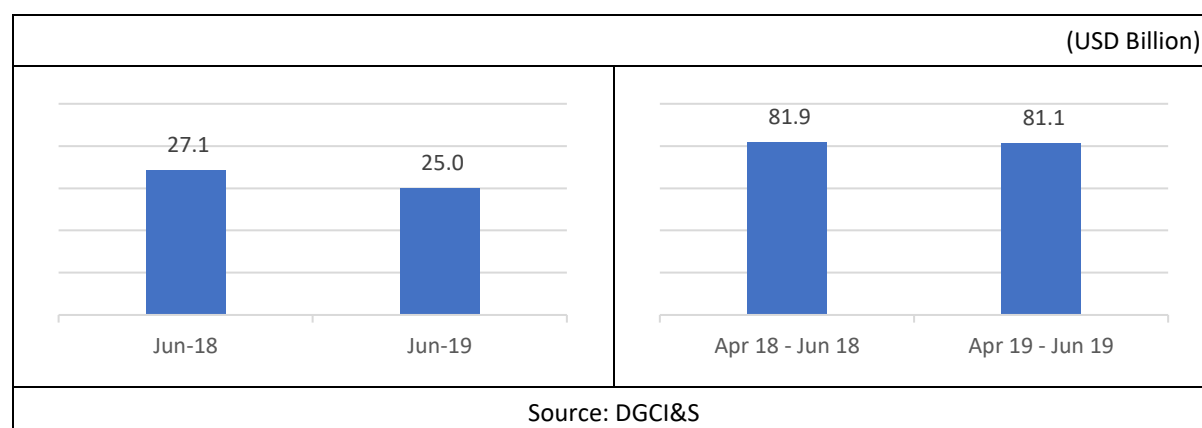
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Disclaimer: This report has been prepared on the basis of principal commodity level data sourced from the Directorate General of Commercial Intelligence and Statistics (DGCI&S) on July 24, 2019

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 25.0 billion in June 2019, down 7.9% from USD 27.2 billion in June 2018. Cumulative value of merchandise exports during April 19 – June 19 was USD 81.1 billion as against USD 81.9 billion during the same period last year, reflecting a decline of 1.0%.

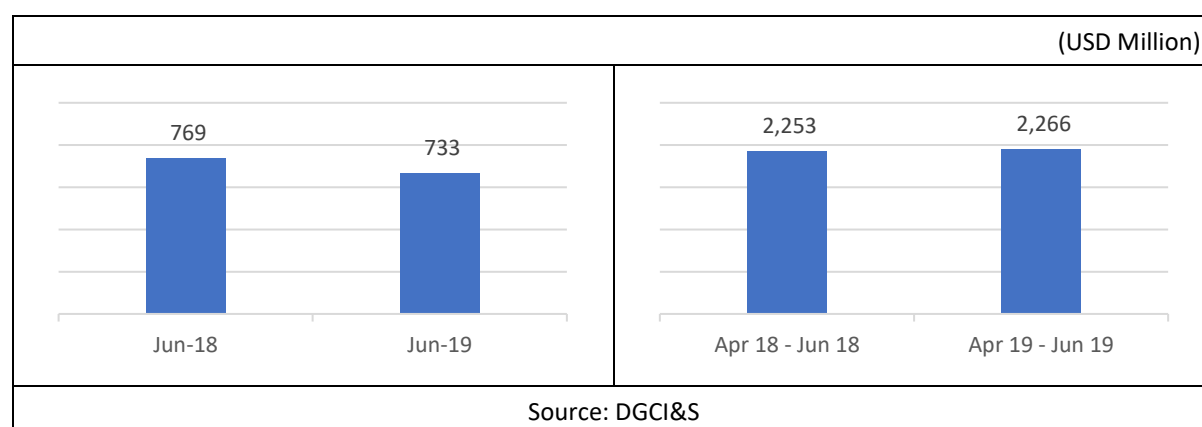
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During June 2019, India exported plastics worth USD 733 million, down 4.7% from USD 769 million in June 2018. Cumulative value of plastics export during April 19 – June 19 was USD 2,266 million as against USD 2,253 million during the same period last year, registering a positive growth of 0.5%.

Exhibit 2: Trend in plastics export by India



- Plastics formed 2.79% of India's overall merchandise exports in April 2019 – June 2019
- India exported plastics to 203 countries in April 2019 – June 2019
- United States, China and United Arab Emirates were the top three buyers of plastics from India in April 2019 – June 2019

PLASTICS EXPORT, BY PANEL

In June 2019, some of the product groups that exhibited good performance were: human hair (up 102.9% year-on-year); moulded & extruded goods (+9.1%); plastic sheet, film, plates etc (+2.5%); and other plastic items (+1.7%). However, plastic raw materials witnessed year-on-year decline of 14.4%; along with optical items (-12.6%); stationery/office/school supply (-10.0%); and packaging materials (-1.9%).

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

Panel	Jun-18	Jun-19	Growth	Apr 18- Jun 18	Apr 19- Jun 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Plastic raw materials	376.37	322.05	-14.4%	1,081.65	956.48	-11.6%
Plastic sheet, film, plates etc	122.53	125.62	2.5%	366.60	387.14	5.6%
Moulded & extruded goods	91.29	99.57	9.1%	264.58	342.49	29.4%
Packaging materials	68.38	67.07	-1.9%	200.38	202.61	1.1%
Optical items (incl. lens etc)	42.60	37.22	-12.6%	122.11	119.99	-1.7%
Other plastic items	31.27	31.79	1.7%	90.67	120.98	33.4%
Stationery/Office/School Supply	22.28	20.05	-10.0%	66.41	64.60	-2.7%
Human hair, products thereof	14.38	29.18	102.9%	60.98	71.37	17.0%
	769.08	732.57	-4.7%	2,253.39	2,265.65	0.5%

Note: Plastics are segregated under eight panels by DGCI&S

Source: DGCI&S

Export growth in plastic sheet, film, plates etc and moulded & extruded goods was driven by higher shipments to the United States of America while that for human hair panel was on account of increased sales to China.

Exports of plastics raw material, however, witnessed a decline due to lower sales to countries like United Arab Emirates, Italy and Egypt. Likewise, export of optical items fell on account of reduced shipment to the United States of America and Hong Kong. Exports of Stationery/office/school supplies were found to be lower across various countries.

PLASTICS EXPORT, BY REGION

India's plastics export in June 2019 did well in regions like North-East Asia (up 20.4% year-on-year); Commonwealth of Independent States (+7.4%); and North America (+5.6%). Export growth was negative in territories like Latin America & Caribbean (-16.4%); Africa (-16.0%); ASEAN + 2 (-14.3%); South Asia (-11.3%); Middle East (-9.4%); and European Union (-4.7%).

Exhibit 4: Region-wise trend in plastics export by India

Region	Jun-18	Jun-19	Growth	Apr 18- Jun 18	Apr 19- Jun 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
European Union (EU)	156.38	149.03	-4.7%	453.56	446.74	-1.5%
Middle East	129.40	117.24	-9.4%	365.73	374.19	2.3%
North-East Asia	95.26	114.88	20.6%	319.26	328.68	3.0%
North America	103.91	109.70	5.6%	302.32	361.31	19.5%
Africa	102.37	86.03	-16.0%	279.52	278.00	-0.5%
South Asia	72.22	64.04	-11.3%	223.74	202.55	-9.5%
ASEAN + 2	57.02	48.85	-14.3%	158.77	146.57	-7.7%
Latin America & Caribbean (LAC)	39.41	32.94	-16.4%	117.51	91.51	-22.1%
CIS	6.81	7.31	7.4%	19.61	28.66	46.2%
Others	6.31	2.55	-59.6%	13.39	7.45	-44.4%
	769.08	732.57	-4.7%	2,253.39	2,265.65	0.5%

Source: DGCI&S

Within North-East Asia, India's plastics exports found great support in China (+36%) and South Korea (+34%) while exports to Commonwealth of Independent States did particularly well in Ukraine (+75%) and Russia (+31%). As far as North America is concerned, plastics exports were higher to destinations like Canada (+34%) and United States (+7%).

However, India's plastics exports were hurt by lower demand in European Union, particularly, Italy (-21%) and France (-8%). Growth in the Middle East was negatively affected due to a decline in sales to Egypt (-58%), Turkey (-19%) and the United Arab Emirates (-16%). Major destinations in Latin America & Caribbean that witnessed a decline in plastics exports from India were Uruguay (-56%) and Colombia (-38%). Plastics exports were also lower to Africa, South Asia and ASEAN, particularly, Pakistan and Nigeria.

PLASTICS EXPORT, BY DESTINATION COUNTRY

During June 2019, nine out of the top 25 destination countries recorded year-on-year growth in plastics export from India. Exports to China and Canada witnessed high growth rates ranging between 30-40%, during the period.

On a cumulative basis, during April 19 – June 19, 11 out of the top 25 destination countries recorded year-on-year growth in plastics export from India. Exports to South Africa, Saudi Arabia and Canada witnessed high growth rates ranging between 30-70%, during the above period.

Exhibit 5: Top 25 destinations of plastics exported by India

Country	Jun-18	Jun-19	Growth	Apr 18- Jun 18	Apr 19- Jun 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
China	71.22	96.70	35.8%	261.05	266.26	2.0%
United States	83.85	90.03	7.4%	242.79	301.00	24.0%
United Arab Emirates	44.53	37.19	-16.5%	118.32	137.99	16.6%
Italy	33.55	26.34	-21.5%	97.65	81.77	-16.3%
Germany	26.31	25.03	-4.8%	79.33	77.55	-2.2%
Bangladesh	23.48	21.63	-7.9%	88.56	75.72	-14.5%
Turkey	28.37	22.97	-19.0%	81.21	52.84	-34.9%
United Kingdom	21.49	23.00	7.1%	61.90	69.93	13.0%
Nepal	19.63	21.30	8.5%	58.36	62.38	6.9%
Vietnam	15.17	13.07	-13.8%	43.33	36.02	-16.9%
France	16.28	14.94	-8.2%	45.10	47.17	4.6%
Indonesia	12.07	9.20	-23.8%	30.72	21.61	-29.6%
Egypt	15.65	6.59	-57.9%	39.01	28.08	-28.0%
Belgium	11.89	11.54	-2.9%	33.63	33.59	-0.1%
Japan	13.98	8.09	-42.1%	31.17	27.09	-13.1%
Nigeria	15.45	9.29	-39.9%	42.79	24.76	-42.1%
Pakistan	14.52	7.02	-51.7%	38.68	28.45	-26.5%
South Africa	10.13	11.79	16.4%	26.74	44.28	65.6%
Israel	8.97	10.05	12.0%	26.10	26.72	2.4%
Mexico	13.01	10.25	-21.3%	36.01	29.16	-19.0%
Kenya	11.56	11.63	0.6%	33.16	34.73	4.7%
Spain	11.85	10.57	-10.8%	32.21	30.21	-6.2%
Sri Lanka	11.45	9.27	-19.0%	27.99	23.88	-14.7%
Canada	7.04	9.42	33.8%	23.52	31.14	32.4%
Saudi Arabia	9.13	10.68	16.9%	24.60	33.92	37.9%

Note: Top 25 destinations based on 2018-19 plastic exports by India

Source: DGCI&S

India exported plastics to 189 countries in June 2019 as compared to 181 countries in June 2018.

Exhibit 6: Panels with details of % growth seen in top 10 export destinations

Panel	Country	Apr 18- Jun 18	Apr 19- Jun 19	Growth
		(USD Mn)	(USD Mn)	(%)
Plastic raw materials	China	204.25	197.68	-3.2%
	Italy	68.88	48.57	-29.5%
	Turkey	68.58	46.88	-31.6%
	Bangladesh	64.75	53.02	-18.1%
	United Arab Emirates	59.74	51.33	-14.1%
	United States	39.61	39.05	-1.4%
	Vietnam	37.20	29.81	-19.9%
	Nepal	34.24	38.72	13.1%
	Indonesia	23.17	12.17	-47.5%
	Pakistan	36.43	26.01	-28.6%
Plastic sheet, film, plates etc	United States	54.03	67.24	24.4%
	United Arab Emirates	14.66	18.79	28.2%
	Germany	17.07	17.13	0.3%
	South Africa	16.04	17.04	6.2%
	Nigeria	23.12	7.88	-65.9%
	Italy	14.34	13.15	-8.3%
	United Kingdom	11.60	14.46	24.6%
	Bangladesh	11.16	8.51	-23.7%
	Mexico	10.85	9.08	-16.3%
	Spain	9.04	11.13	23.2%
Moulded & extruded goods	United States	57.65	103.10	78.9%
	United Arab Emirates	15.94	33.97	113.1%
	United Kingdom	14.11	15.89	12.7%
	Germany	14.33	11.94	-16.7%
	Canada	10.79	15.12	40.2%
	Sri Lanka	5.54	3.00	-45.8%
	Spain	6.11	5.14	-15.8%
	Nigeria	4.91	5.24	6.6%
	Saudi Arabia	4.58	5.86	27.9%
	Brazil	3.90	5.71	46.6%
Packaging materials	United States	34.63	42.89	23.9%
	United Kingdom	16.61	16.35	-1.6%
	United Arab Emirates	10.93	11.65	6.6%
	Netherland	7.32	6.95	-5.1%
	Germany	6.61	5.05	-23.5%
	Belgium	5.86	2.09	-64.3%
	France	4.54	4.52	-0.5%
	Spain	4.53	3.93	-13.4%
	Djibouti	8.11	4.94	-39.0%
	Nepal	5.25	3.62	-31.1%

Note: Top 10 destinations based on India's 2018-19 exports under the eight plastic product panels

Source: DGCI&S

Panel	Country	Apr 18- Jun 18	Apr 19- Jun 19	Growth
		(USD Mn)	(USD Mn)	(%)
Optical items (incl. lens etc)	France	27.63	32.79	18.6%
	Germany	13.02	12.58	-3.4%
	United Kingdom	9.30	10.37	11.5%
	United States	9.52	3.00	-68.5%
	United Arab Emirates	4.69	5.41	15.4%
	Netherland	5.91	5.08	-14.2%
	Poland	4.97	3.17	-36.2%
	Italy	2.87	7.94	176.9%
	Russia	0.29	5.25	1716.9%
	Israel	1.67	2.51	50.2%
Other plastic items	United States	22.02	20.28	-7.9%
	Belgium	8.80	6.28	-28.6%
	United Arab Emirates	7.95	13.25	66.6%
	South Africa	2.34	16.52	606.6%
	United Kingdom	1.94	4.51	132.4%
	Italy	2.44	3.74	52.8%
	Germany	2.89	4.68	62.0%
	Poland	1.38	2.27	64.8%
	Nepal	2.08	2.22	7.1%
	Saudi Arabia	2.15	2.47	14.6%
Human hair, products thereof	China	37.59	48.79	29.8%
	Myanmar	4.31	2.77	-35.6%
	United States	4.33	4.18	-3.6%
	Tunisia	2.73	3.76	37.5%
	Hong Kong	2.24	3.34	49.1%
	Bangladesh	1.80	1.10	-38.8%
	United Arab Emirates	1.58	1.10	-30.7%
	Vietnam	0.58	1.31	125.2%
	Indonesia	0.66	0.52	-22.0%
	Italy	1.00	0.61	-39.5%
Stationery/Office/School Supply	United States	21.00	21.26	1.3%
	United Arab Emirates	2.83	2.48	-12.3%
	United Kingdom	3.84	3.48	-9.4%
	Thailand	3.09	2.50	-19.0%
	Algeria	1.36	2.15	57.7%
	Bangladesh	1.34	1.72	29.1%
	Germany	1.42	1.38	-2.4%
	Mexico	1.70	1.20	-29.8%
	Latvia	1.29	0.70	-45.2%
	Nepal	1.01	1.24	22.5%

Note: Top 10 destinations based on India's 2018-19 exports under the eight plastic product panels

Source: DGCI&S

ANNEXURE-I

Trend in overall exports by India

Month	2018-19	2019-20	Growth
	(USD Bn)	(USD Bn)	(%)
April	25.95	26.07	0.5%
May	28.78	30.01	4.3%
June	27.15	25.01	-7.9%
	81.88	81.09	-1.0%

Source: DGCI&S

ANNEXURE-II

Trend in plastics export by India

Month	2018-19	2019-20	Growth
	(USD Mn)	(USD Mn)	(%)
April	742.66	702.53	-5.4%
May	741.65	830.55	12.0%
June	769.08	732.57	-4.7%
	2,253.39	2,265.65	0.5%

Source: DGCI&S

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