

ANALYSIS OF INDIA'S PLASTICS EXPORT

MAY 2025



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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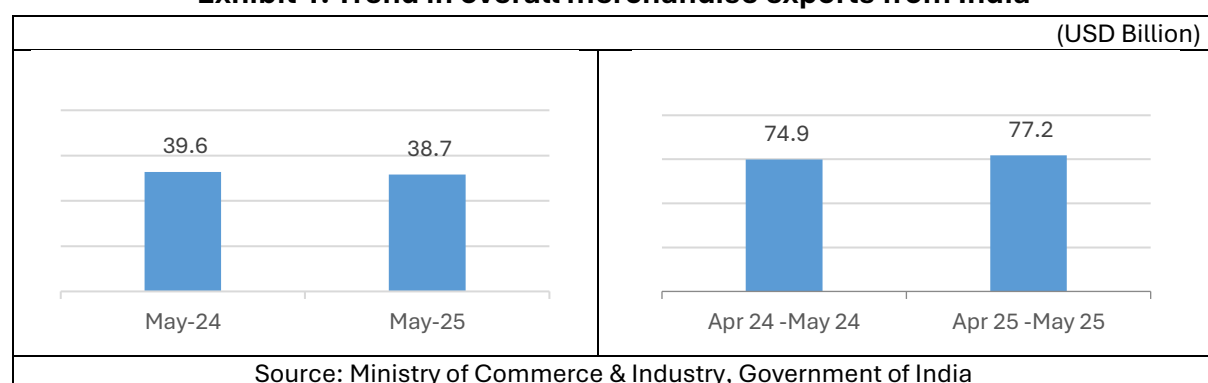
Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India.

Key Findings
Plastic exports grew 4.2% in May 25, despite decline -2.2% in overall merchandise exports.
This marks second consecutive month in current financial year of growth indicating strong demand for Indian plastic products globally.
There was strong demand in USA & other developed markets for houseware products, FIBC, plastic medical items and other value-added goods.
Decline in exports of FRP, composites & floor covering products was due to weak demand in the middle east, Italy & South Asian countries.

TREND IN OVERALL EXPORTS

India's overall merchandise exports declined 2.2% during May 2025 from the year ago month after growing at 9.1% in April 2025. The fall in exports during May 2025 was led by contraction in shipments of petroleum products, processed diamond & other products. However, cumulative merchandise exports during Apr-May 2025 recorded 3.1% growth.

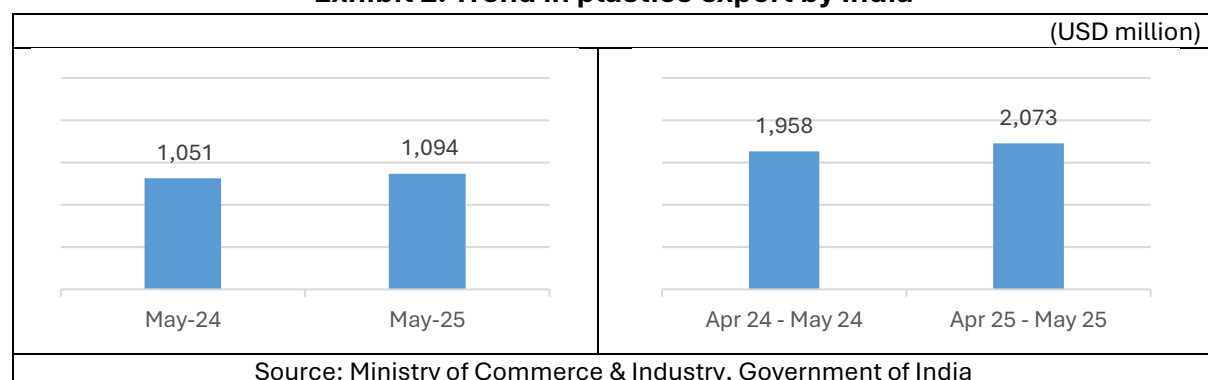
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

India's plastics exports recorded a 4.2% growth in May 2025, marking the second consecutive month of expansion driven by strong global demand. Shipments rose from USD 1.05 billion in May 2024 to USD 1.09 billion in May 2025. Over April-May 2025, exports grew nearly 6% to USD 2.1 billion, supported by robust performance across most product segments.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In May 2025, seven out of the 13 panels recorded growth in exports, while the rest posted mild declines. Notably, several categories such as FIBC, woven sacks, packaging items, human hair, and consumer & houseware products witnessed double-digit growth, contributing significantly to the overall expansion. The remaining growing segments, including medical items, writing instruments and miscellaneous items also supported the upward trend

Exports of cordage, fishnets; floorcoverings, plastic films & sheets; FRP & composites; pipes & fittings, and plastics raw materials registered contraction during this month as the following Exhibit shows.

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

Panel	May-24	May-25	Growth	Apr 24-May-24	Apr 25-May-25	Growth
	USD million		%	USD million		%
Consumer & houseware products	65.9	74.5	13.0%	122.8	144.5	17.7%
Cordage, fishnets & monofilaments	25.1	23.0	-8.5%	45.1	45.3	0.5%
FIBC, Woven sacks, Woven fabrics, Tarpaulin	118.0	146.6	24.2%	228	281.6	23.5%
Floorcoverings, leathercloth & laminates	65.6	65.1	-0.8%	118	122.9	4.2%
FRP & Composites	45.5	42.5	-6.6%	84.5	82.3	-2.6%
Human hair & related products	66.3	76.9	16.1%	116.1	128.6	10.7%
Medical items of plastics	44.1	47.4	7.6%	86.4	93.45	8.2%
Miscellaneous products and items nes	61.9	67.7	9.4%	104.7	126.4	20.7%
Packaging items - flexible, rigid	53.5	59.0	10.3%	105.9	113	6.8%
Plastic films and sheets	179.0	169.8	-5.1%	340.7	327.9	-3.8%
Plastic pipes & fittings	24.6	24.3	-1.3%	46.9	49.9	6.3%
Plastic raw materials	278.6	274.6	-1.4%	513.8	513	-0.2%
Writing instruments & stationery	22.7	23.1	1.9%	44.6	44.7	0.2%
	1,051	1,094	4.2%	1,957	2,073	5.9%

Source: Ministry of Commerce & Industry, Government of India

Exports of **Consumer & houseware products** posted healthy growth of 13.0% during the month under review because of robust demand in USA and European countries. The growth was led by increase in shipments of other Tableware and Kitchenware (HS 392410) to USA; Other Household and toilet articles (39249090) to the UK and Toothbrushes (96032100) to USA and Brazil.

Exports of **Cordage, fishnets & monofilaments** witnessed 8.5% decline during the month because of fall in shipments of Coir, cordage and ropes (56079010). There were also signs of weak demand for made-up fishing nets (HS 56081190) in Norway and Morocco.

Exports of **FIBC, woven sacks and woven fabrics** posted the highest growth of 24.2% among 13 panels during May 2025 because of strong export orders from western

markets. Specifically, exports of FIBC (630532) recorded strong growth to USA, Spain, UK and other European markets.

Shipment of **Floor covering, leather cloth and laminates** dropped marginally by 0.8% during May 2025 because of weak demand condition in South Asia and Middle East countries. Specifically, sales of floor coverings of PVC (391810) were lower in Saudi Arabia, Italy, Nepal and Yemen.

Export of **FRP and composites** declined 6.6% due to lower sales of other plastic articles nes (392690).

Shipment of **Human Hair & related products** posted the second highest growth of 16.1% among all the product panels driven by strong sales of processed human hair (67030010) to Viet Nam. Similarly, export of unprocessed hair (05010010) recorded strong growth in Myanmar.

India recorded 7.6% growth in export of **Medical Items of Plastics** during May 2025 led by rise in sales of Cannulae (90183930) to the USA, UAE, Saudi Arabia & Afghanistan.

There was 9.4% growth in shipment of **Miscellaneous products & items nes** due to improving order inflows for optical fibres and cables (900110) from the USA, UK, Saudi Arabia and other markets.

Indian exporters registered 10.3% growth in shipment of **packaging items – flexible, rigid** led by rise in demand in USA and France for conveyance or packaging articles (39239090). Exporters of Sacks and Bags of Polyethylene (39232100) also witnessed strong demand in USA and UK.

Shipment of **Plastic Films & Sheets** dropped 5.1% led by fall in sales of flexible, plain PET plates and sheets (39206220) to Germany, Italy and other markets. There was also fall in export of Other Self-Adhesive Plates (391990) to UK, Spain and South Africa.

Export of **Plastic Pipes & Fittings** fell 1.3% because of weak demand condition in Nepal, USA and Bhutan for Polyethylene Tubes Pipes and Hoses (391721); There was also decline in shipment of Tubes, Pipes and Hoses of other Plastics (39172990) to Qatar, Viet Nam and USA.

There was a 1.4% fall in export of **Plastic Raw Materials** in May 2025 due to decline in shipment of polyethylene (390110) to UAE, Egypt and Saudi Arabia. There has also been declining orders from Nigeria, South Korea and recently from Nepal and China for Ethylene (390140).

India witnessed 1.9% growth in export of **Writing instruments & stationery** because of increase in demand in recent times from USA, Germany, Canada and UK for office or school supplies (39261099). There was also revival in demand for Pen Nibs and Nib Points from Bangladesh, Viet Nam and Mexico in recent months.

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

HS Code	Description	Apr 24- May-24	Apr 25- May 25	Growth
		Values in USD Mn		(%)
63053200	Flexible intermediate bulk containers	130.1	171.4	+31.7%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	93.4	92.0	-1.5%
39269099	Other articles of plastics n.e.s	83.3	81.5	-2.1%
39232990	Other sacks and bags of plastics excl. those of polymers of ethylene	72.6	82.2	+13.1%
39021000	Polypropylene	74.3	45.7	-38.5%
39076190	Other primary form of polyethylene terephthalate	37.5	49.4	+31.8%
48239019	Decorative laminates	47.7	52.1	+9.2%
90011000	Optical fibres, optical fibre bundles and cables	43.1	56.8	+31.9%
39206220	Flexible and plain sheets and film of non-cellular polyethylene terephthalate	51.1	40.6	-20.5%
39269080	Polypropylene articles	40.6	45.3	+11.7%
39069090	Other acrylic polymers, in primary forms	35.2	39.9	+13.1%
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced	43.0	38.0	-11.5%
39232100	Sacks and bags, incl. cones, of polymers of ethylene	31.6	34.9	+10.4%
59039090	Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane	36.7	36.4	-0.7%
39239090	Other articles for the conveyance or packaging of goods, of plastics	32.5	34.7	+6.7%
5010010	Human hair, unworked; whether or not washed or scoured	22.2	35.8	+61.0%
39014010	Linear low density polyethylene (LLDPE	29.4	18.5	-37.2%
39202090	Films and sheets of non-cellular polymers of ethylene, not reinforced	27.6	28.0	+1.4%
90015000	Spectacle lenses of materials other than glass	27.4	28.5	+4.0%
90183930	Cannulae	20.6	26.5	+28.5%
39012000	Polyethylene with a specific gravity of >= 0,94, in primary forms	18.4	17.7	-3.9%
39219099	Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	24.5	23.0	-6.1%
96081019	Ball-point pens	21.8	19.8	-9.3%
39199090	Other self-adhesive sheets and film of plastics, whether or not in rolls > 20 cm wide	17.8	16.1	-9.5%
56074900	Twine, cordage, ropes and cables of polyethylene or polypropylene	18.6	19.2	+3.2%
39046100	Polytetrafluoroethylene	20.4	22.9	+12.1%

HS Code	Description	Apr 24- May-24	Apr 25- May 25	Growth
		Values in USD Mn		(%)
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	21.2	19.8	-6.7%
39076990	Other primary form of polyethylene terephthalate	17.2	19.8	+15.1%
39129090	Other cellulose and chemical derivatives thereof, n.e.s., in primary forms	18.1	22.2	+22.8%
39219094	Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	18.3	18.4	+0.3%
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	15.9	14.2	-10.8%
39046990	Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms	17.9	17.0	-5.2%
39241090	Other tableware and kitchenware, of plastics	16.9	18.7	+10.7%
39206919	Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported or similarly combined with other materials, not worked	13.6	19.1	+40.3%
39206290	Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported or similarly combined with other materials, without backing, unworked	17.3	14.0	-18.8%
39072990	Other polyethers n.e.s	13.5	16.1	+19.3%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or	14.7	11.5	-22.1%
39095000	Polyurethanes, in primary forms	14.3	13.7	-4.1%
39206929	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	15.4	13.8	-10.0%
39204900	Sheets and film of non-cellular polymers of vinyl chloride, containing by weight $< 6\%$ of plasticisers, not reinforced	12.1	12.4	+2.8%
96032100	Tooth brushes	12.2	15.8	+29.9%
39119090	Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s.	13.0	17.2	+32.3%
59031090	Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride	12.1	13.3	+10.3%

HS Code	Description	Apr 24- May-24	Apr 25- May 25	Growth
		Values in USD Mn		(%)
39219096	Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	13.4	14.5	+8.5%
39201019	Other sheets and film of non-cellular plastics	13.9	13.1	-6.0%
39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	13.6	11.3	-16.5%
39011090	Other polyethylene with a specific gravity of < 0.94, in primary forms	14.9	13.5	-9.4%
39172390	Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other	10.2	10.7	+4.6%
39076930	PET flake (chip)	10.0	20.9	+109.2%
39241010	Tableware and kitchenware, of plastics: Insulated ware	8.7	10.9	+25.7%

Source: Ministry of Commerce & Industry, Government of India

Exhibit 5: Reasons for major decline in plastic products exports

HS Code	Description	Apr 24- May 24	Apr 25 – May 25	Reasons for decline
		(USD Mn)		
39021000	Polypropylene	74.3	45.7	Exports have declined because of weak demand in Bangladesh, which is the top destination for this product. Exports have declined also because of domestic shortage as India is a net importer of this raw material
39014010	Linear low-density polyethylene (LLDPE)	29.4	18.45	Exports have declined due to lower shipments to China, which was the largest market for this product. Exports have declined also because of domestic shortage as India is a net importer of this raw material.
39206220	Flexible and plain sheets and film of non-cellular polyethylene terephthalate	51.1	40.6	Decline in exports can be attributed to weak demand in European countries such as Germany and Netherlands, which are among the top 5 markets for this product
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene	43.0	38.0	Indian exporters are facing weak demand in Germany, Colombia and Nepal, which are among top 12 markets for this product

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

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