

ANALYSIS OF INDIA'S PLASTICS EXPORT
NOVEMBER 2019



THE PLASTICS EXPORT PROMOTION COUNCIL

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

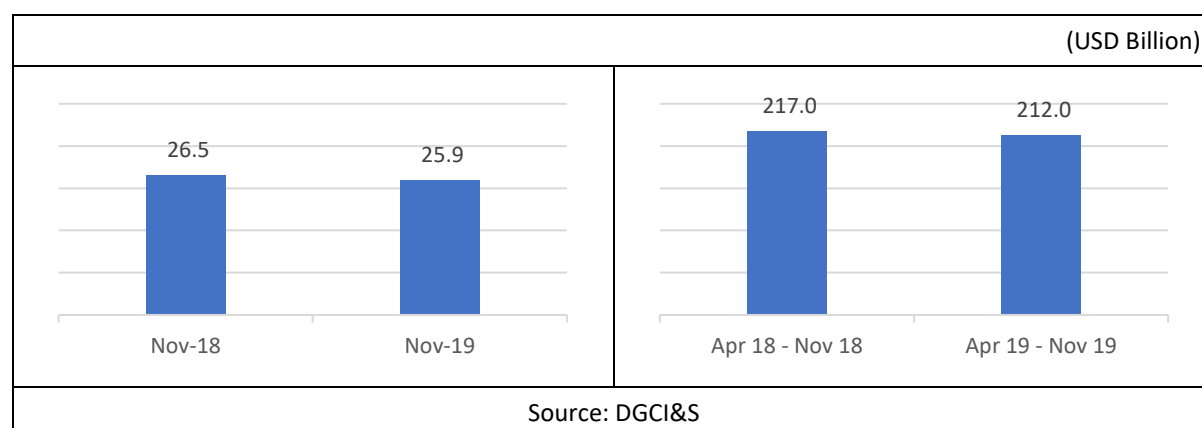
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Disclaimer: This report has been prepared on the basis of principal commodity level data sourced from the Directorate General of Commercial Intelligence and Statistics (DGCI&S) on December 26, 2019

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 25.9 billion in November 2019, down 2.0% from USD 26.5 billion in November 2018. Cumulative value of merchandise exports during April 2019 – November 2019 was USD 212.0 billion as against USD 217.0 billion during the same period last year, reflecting a decline of 2.3%.

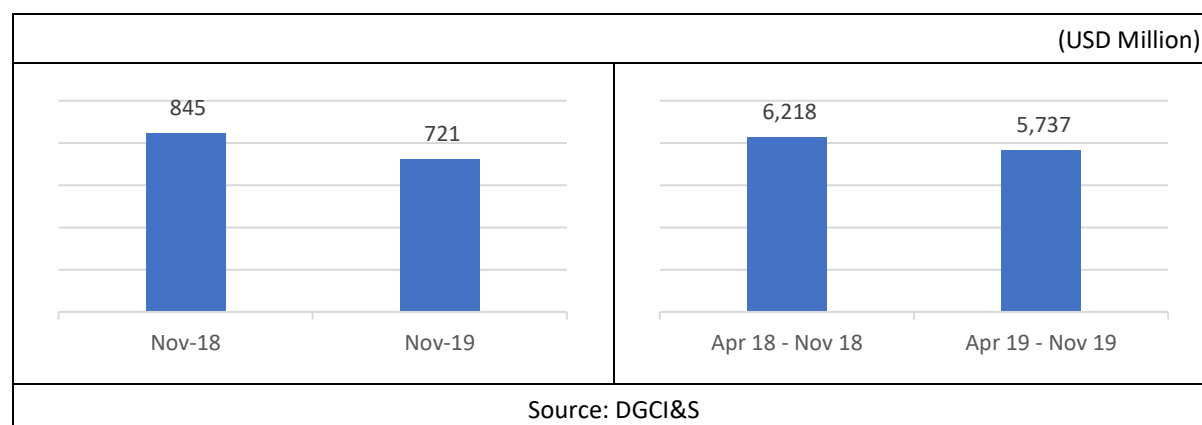
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During November 2019, India exported plastics worth USD 721 million, down 14.8% from USD 845 million in November 2018. Cumulative value of plastics export during April 2019 – November 2019 was USD 5,737 million as against USD 6,218 million during the same period last year, registering a negative growth of 7.7%.

Exhibit 2: Trend in plastics export by India



- Plastics formed 2.71% of India's overall merchandise exports in April 2019 – November 2019
- India exported plastics to 210 countries in April 2019 – November 2019
- China, United States and United Arab Emirates were the top three buyers of plastics from India in April 2019 – November 2019

PLASTICS EXPORT, BY PANEL

In November 2019, packaging materials witnessed year-on-year growth of 15.3%; followed by human hair, products thereof (+10.4%); moulded & extruded goods (+8.0%); and other plastic items (+20.2%). Product categories that reported negative growth include plastic raw materials (-29.3%); optical items (-25.1%); plastic sheet, film, plates (-1.7%); and stationery/office/school supply (-1.2%).

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

Panel	Nov-18	Nov-19	Growth	Apr 18- Nov 18	Apr 19- Nov 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Plastic raw materials	469.84	332.06	-29.3%	3,093.87	2,421.01	-21.7%
Plastic sheet, film, plates etc	116.46	114.52	-1.7%	971.92	993.96	2.3%
Moulded & extruded goods	87.09	94.07	8.0%	731.19	828.51	13.3%
Packaging materials	61.13	70.49	15.3%	550.26	575.37	4.6%
Optical items (incl. lens etc)	37.97	28.43	-25.1%	314.92	289.62	-8.0%
Other plastic items	26.76	32.16	20.2%	239.33	290.91	21.6%
Stationery/Office/School Supply	18.06	17.85	-1.2%	161.61	154.55	-4.4%
Human hair, products thereof	28.11	31.04	10.4%	154.60	183.42	18.6%
	845.42	720.60	-14.8%	6,217.70	5,737.35	-7.7%

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

Source: DGCI&S

Some of the products which witnessed a huge decline in exports from India were:

- Within plastics raw materials, India's exports of Polypropylene (HS code 39021000) fell 49.1% yoy to USD 62.6 million in November 2019 due to lower sales to Turkey, China, and Pakistan, and continued weakness in demand from key end-use sectors such as autos coupled with lower prices. Likewise, exports of Polyethylene terephthalate having a viscosity number of 78 ml/g or higher (HS code 39076100) fell 28.6% yoy to USD 71.0 million in November 2019 due to lower sales to Italy, Japan and Uruguay. Exports of another variety of Polyethylene terephthalate (HS code 39076990) slipped 54.2% yoy to USD 7.57 million in November 2019 due to lower sales to Mexico, UAE, and Egypt. Even exports of Polyethylene having a specific gravity of 0.94 or more (HS code 39012000) was down 21.4% yoy to USD 47.5 million in November 2019 due to lower sales to China. Exports of Linear low-density polyethylene (HS code 39011010) was also down 38.8% yoy to USD 35.6 million in November 2019 due to lower sales to China.
- Among value-added plastics products, export of Optical items (incl. lens etc) from India was lower due to a decline in export of Optical fibers, optical fibre bundles and cables (HS code 90011000), down 40.1% yoy to USD 13.4 million in November 2019 to Finland. Exports of Plastic sheet, film, plates etc fell due to lower sales to USA, UK, South Africa and China. Exports of Stationery / Office / School supply was lower on account of decline in sales of Ball-point pens (HS code 96081099).

PLASTICS EXPORT, BY REGION

India's plastics export in November 2019 was positive in three territories including Commonwealth of Independent States (+13.0%); Africa (+7.6%); and North America (+4.0%). Export growth was negative in Latin America & Caribbean (-32.2%); South Asia (-30.8%); European Union (-27.4%); Middle East (-19.0%); North-East Asia (-15.9%); and ASEAN + 2 (-0.1%).

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

Region	Nov-18	Nov-19	Growth	Apr 18- Nov 18	Apr 19- Nov 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
European Union (EU)	153.14	111.18	-27.4%	1,227.70	1,079.86	-12.0%
Middle East	192.59	156.04	-19.0%	982.47	918.83	-6.5%
North-East Asia	117.44	98.77	-15.9%	944.14	880.90	-6.7%
North America	96.38	100.20	4.0%	816.94	894.18	9.5%
Africa	86.58	93.13	7.6%	742.95	706.76	-4.9%
South Asia	79.66	55.08	-30.8%	576.96	500.56	-13.2%
ASEAN + 2	63.42	63.38	-0.1%	494.88	421.68	-14.8%
Latin America & Caribbean (LAC)	45.64	30.93	-32.2%	341.85	239.83	-29.8%
CIS	8.51	9.61	13.0%	62.00	74.17	19.6%
Others	2.06	2.28	10.8%	27.81	20.59	-26.0%
	845.42	720.60	-14.8%	6,217.70	5,737.35	-7.7%

Source: DGCI&S

India's plastics exports to Latin America & Caribbean witnessed a decline due to lower sales of Polyethylene Terephthalate (HS code 39076100) and Polypropylene (HS code 39021000) to Peru, Uruguay and Colombia.

India's plastics exports to South Asia witnessed a decline on account of lower sales to Pakistan and Bangladesh. India's trade with Pakistan has been negatively affected due to strained trade relations between the two countries since the start of the year. India's exports to Bangladesh have been hurt due to lower sales of Polyethylene Terephthalate and Polypropylene.

India's plastics exports to European Union witnessed a decline due to lower sales of plastic raw materials, particularly Polyethylene Terephthalate, Polypropylene, Polytetrafluoroethylene (HS code 39046100) and Epoxy resins (HS code 39073010) to Italy and Germany. A decline in export of Optical fibres, optical fibre bundles and cables (HS code 90011000) to France also affected India's plastics exports.

India's plastics exports to Middle East witnessed a decline due to lower sales of Polypropylene to Turkey and Polyethylene Terephthalate to Israel.

India's plastics exports to North-East Asia witnessed a decline due to lower sales of Linear Low-Density Polyethylene (HS code 39011010 and 39011090) and Polypropylene to China.

PLASTICS EXPORT, BY DESTINATION COUNTRY

During November 2019, six out of the top 25 destination countries recorded year-on-year growth in plastics export from India. Export to Saudi Arabia witnessed a high growth rate of 76.3% during the period.

On a cumulative basis, during April 2019 – November 2019, seven out of the top 25 destination countries recorded year-on-year growth in plastics export from India. Exports to Saudi Arabia and South Africa, witnessed high growth rates ranging between 25-40%, during the above period.

Exhibit 5: Top 25 destinations of plastics exported by India

Country	Nov-18	Nov-19	Growth	Apr 18- Nov 18	Apr 19- Nov 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
China	168.23	137.33	-18.4%	815.82	761.94	-6.6%
United States	76.54	81.75	6.8%	656.15	739.36	12.7%
United Arab Emirates	33.11	29.47	-11.0%	292.59	299.00	2.2%
Italy	30.40	19.79	-34.9%	256.07	186.29	-27.3%
Germany	24.15	16.77	-30.6%	211.67	190.52	-10.0%
Bangladesh	29.35	21.02	-28.4%	227.58	186.70	-18.0%
Turkey	27.07	17.87	-34.0%	194.53	141.05	-27.5%
United Kingdom	21.62	20.79	-3.8%	173.52	176.32	1.6%
Nepal	20.44	20.28	-0.8%	156.20	167.61	7.3%
Vietnam	18.75	21.25	13.3%	139.61	105.05	-24.8%
France	15.54	8.73	-43.8%	124.39	107.19	-13.8%
Indonesia	18.44	10.47	-43.2%	126.20	71.61	-43.3%
Egypt	13.25	9.41	-29.0%	114.47	68.23	-40.4%
Belgium	11.70	7.50	-35.9%	88.79	73.79	-16.9%
Japan	16.03	10.03	-37.4%	97.65	75.69	-22.5%
Nigeria	8.62	13.84	60.5%	103.19	83.91	-18.7%
Pakistan	16.74	0.41	-97.6%	87.17	41.58	-52.3%
South Africa	7.84	8.28	5.6%	73.64	94.71	28.6%
Israel	15.36	9.08	-40.8%	90.49	76.82	-15.1%
Mexico	9.94	7.80	-21.5%	88.17	70.95	-19.5%
Kenya	14.84	10.73	-27.7%	88.45	83.92	-5.1%
Spain	9.72	7.40	-23.8%	80.49	71.17	-11.6%
Sri Lanka	9.79	8.94	-8.7%	79.93	68.44	-14.4%
Canada	9.90	10.65	7.5%	72.63	83.87	15.5%
Saudi Arabia	6.51	11.48	76.3%	59.07	81.64	38.2%

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

Source: DGCI&S

India exported plastics to 189 countries in November 2019 as compared to 179 countries in November 2018.

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

Panel	Country	Apr 18- Nov 18	Apr 19- Nov 19	Growth
		(USD Mn)	(USD Mn)	(%)
Plastic raw materials	China	677.42	581.05	-14.2%
	Italy	181.51	110.04	-39.4%
	Turkey	168.93	122.04	-27.8%
	Bangladesh	162.28	121.34	-25.2%
	United Arab Emirates	138.49	110.26	-20.4%
	United States	119.51	89.23	-25.3%
	Vietnam	122.99	89.65	-27.1%
	Nepal	95.67	101.90	6.5%
	Indonesia	101.03	47.14	-53.3%
	Pakistan	79.97	38.33	-52.1%
Plastic sheet, film, plates etc	United States	147.80	177.16	19.9%
	United Arab Emirates	40.38	43.57	7.9%
	Germany	47.83	44.48	-7.0%
	South Africa	42.40	45.99	8.5%
	Nigeria	45.50	25.74	-43.4%
	Italy	33.67	30.41	-9.7%
	United Kingdom	32.69	39.94	22.2%
	Bangladesh	31.69	24.47	-22.8%
	Mexico	32.15	25.31	-21.3%
	Spain	25.39	25.02	-1.5%
Moulded & extruded goods	United States	165.43	231.38	39.9%
	United Arab Emirates	44.46	63.87	43.7%
	United Kingdom	37.12	38.26	3.1%
	Germany	35.88	32.26	-10.1%
	Canada	32.58	43.23	32.7%
	Sri Lanka	16.76	9.10	-45.7%
	Spain	15.08	12.79	-15.2%
	Nigeria	12.44	14.76	18.6%
	Saudi Arabia	10.13	16.09	58.8%
	Brazil	13.02	16.23	24.6%
Packaging materials	United States	105.18	123.20	17.1%
	United Kingdom	45.87	42.06	-8.3%
	United Arab Emirates	28.36	33.25	17.2%
	Netherland	21.04	19.53	-7.2%
	Germany	16.71	12.79	-23.5%
	Belgium	14.75	6.20	-58.0%
	France	13.19	11.67	-11.5%
	Spain	12.53	11.92	-4.8%
	Djibouti	9.65	9.27	-3.9%
	Nepal	10.10	9.06	-10.3%

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

Source: DGCI&S

Panel	Country	Apr 18- Nov 18	Apr 19- Nov 19	Growth
		(USD Mn)	(USD Mn)	(%)
Optical items (incl. lens etc)	France	79.97	70.65	-11.7%
	Germany	33.20	30.33	-8.6%
	United Kingdom	28.75	27.44	-4.5%
	United States	18.01	7.58	-57.9%
	United Arab Emirates	8.96	12.48	39.3%
	Netherland	13.08	15.44	18.1%
	Poland	10.54	12.28	16.6%
	Italy	8.56	15.80	84.6%
	Russia	8.33	6.33	-24.0%
	Israel	5.97	5.25	-12.1%
Other plastic items	United States	54.87	63.38	15.5%
	Belgium	22.89	17.57	-23.2%
	United Arab Emirates	19.34	25.07	29.6%
	South Africa	6.23	20.07	222.2%
	United Kingdom	8.38	11.11	32.6%
	Italy	9.28	10.01	7.8%
	Germany	7.63	10.12	32.7%
	Poland	5.75	5.95	3.4%
	Nepal	6.32	6.38	0.9%
	Saudi Arabia	5.56	6.47	16.3%
Human hair, products thereof	China	87.47	126.30	44.4%
	Myanmar	17.31	5.80	-66.5%
	United States	10.41	10.36	-0.5%
	Tunisia	6.94	9.06	30.5%
	Hong Kong	6.58	8.71	32.3%
	Bangladesh	3.57	4.40	23.3%
	United Arab Emirates	3.73	2.84	-23.8%
	Vietnam	2.10	2.44	16.4%
	Indonesia	2.72	1.91	-29.6%
	Italy	2.43	1.68	-30.9%
Stationery/Office/School Supply	United States	34.93	37.08	6.1%
	United Arab Emirates	8.86	7.65	-13.7%
	United Kingdom	9.42	7.32	-22.3%
	Thailand	7.92	6.70	-15.4%
	Algeria	4.14	5.15	24.4%
	Bangladesh	4.12	4.99	21.0%
	Germany	4.25	3.55	-16.3%
	Mexico	3.57	2.59	-27.4%
	Latvia	3.67	1.88	-48.7%
	Nepal	3.56	3.24	-9.0%

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%
July	25.89	26.32	1.7%
August	27.87	26.13	-6.3%
September	27.90	26.11	-6.4%
October	26.98	26.43	-2.1%
November	26.46	25.94	-2.0%
	216.99	212.02	-2.3%

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%
July	730.46	709.33	-2.9%
August	830.05	699.40	-15.7%
September	780.35	649.17	-16.8%
October	778.02	693.21	-10.9%
November	845.42	720.60	-14.8%
	6,217.70	5,737.35	-7.7%

Source: DGCI&S

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