

ANALYSIS OF INDIA'S PLASTICS EXPORT

NOVEMBER 2020



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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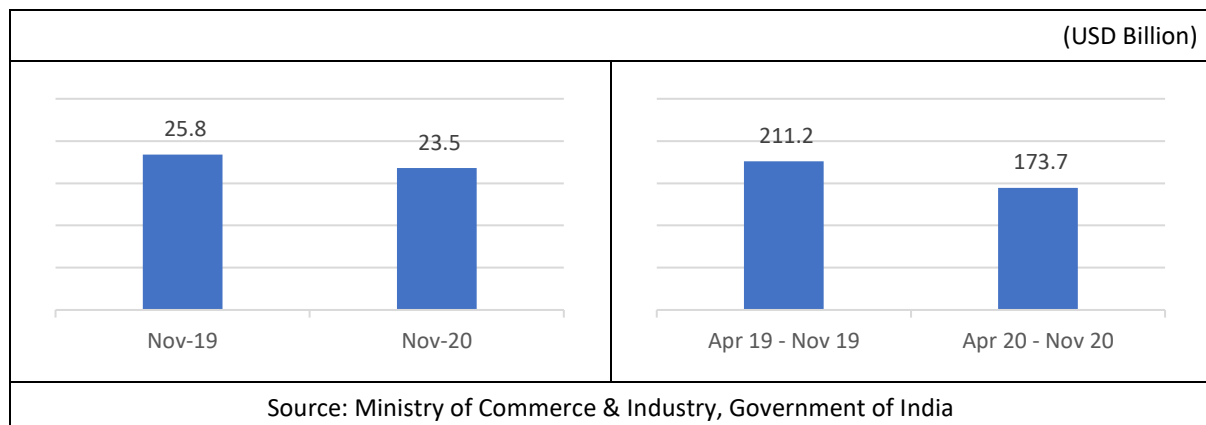
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Disclaimer: This report has been prepared on the basis of export data sourced from the Ministry of Commerce & Industry, Government of India.

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 23.5 billion in November 2020, down 8.7% from USD 25.8 billion in November 2019. Cumulative value of merchandise exports during April 2020 – November 2020 was USD 173.7 billion as against USD 211.2 billion during the same period last year, reflecting a decline of 17.8%.

Exhibit 1: Trend in overall merchandise exports from India

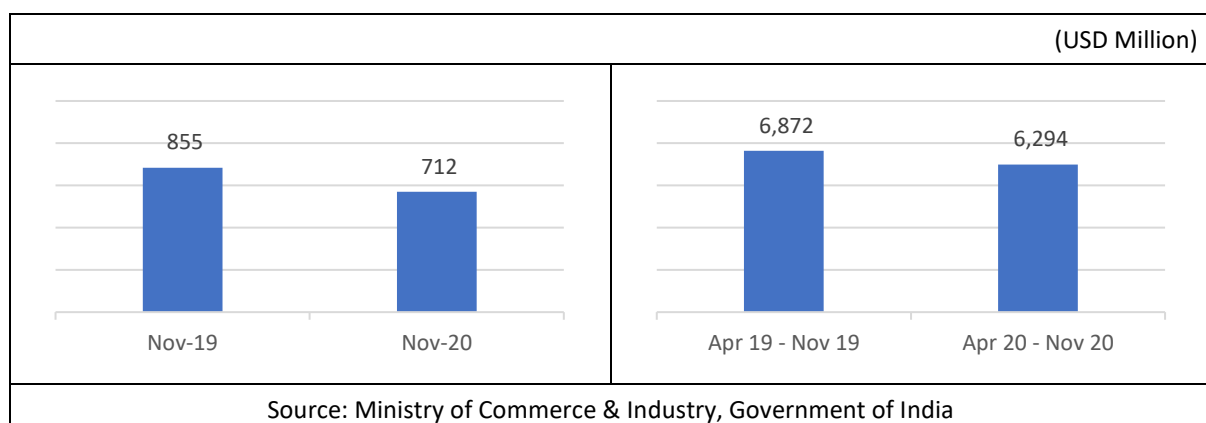


TREND IN PLASTICS EXPORT

During November 2020, India exported plastics worth USD 712 million, down 16.8% from USD 855 million in November 2019. Cumulative value of plastics export during April 2020 – November 2020 was USD 6,294 million as against USD 6,872 million during the same period last year, registering a negative growth of 8.4%.

Indian exporters have been increasingly facing problems of shortage of containers and increased freight rate for shipping their goods. As a matter of fact, the huge back log at all the major Indian ports is now leading to longer lead times to service the export orders. In addition, there has also been a substantial increase in prices of plastics raw material which is affecting the Indian exporters ability to compete in the International market.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

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

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

Panel	Nov-19	Nov -20	Growth	Apr 19- Nov 19	Apr 20- Nov 20	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Consumer & House ware	46.6	46.0	-1.4%	397.3	310.2	-21.9%
Cordage & Fishnets	15.5	15.9	+2.7%	111.3	105.8	-5.0%
Composites / FRP products	26.5	26.9	+1.2%	220.2	177.5	-19.4%
Floor Coverings, Leather cloth & Laminates	33.4	41.2	+23.3%	285.3	277.2	-2.8%
Human Hair & Related Products	31.0	41.3	+32.9%	183.4	216.4	+18.0%
Miscellaneous Products	113.4	121.2	+6.9%	1,059.7	912.1	-13.9%
Pipes & Fittings	16.0	17.0	+5.9%	123.9	112.0	-9.6%
Polyester Films	114.6	107.9	-5.9%	994.9	1,002.5	+0.8%
Raw Materials	335.4	184.6	-45.0%	2,455.3	2,377.8	-3.2%
Rigid Packaging & PET Preforms	27.2	26.0	-4.4%	221.9	207.2	-6.6%
Woven Sacks / FIBCs	78.8	73.8	-6.4%	683.2	503.3	-26.3%
Writing Instruments	16.8	10.3	-38.5%	135.9	91.6	-32.6%
	855.3	711.8	-16.8%	6,872.3	6,293.7	-8.4%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & house ware** products fell by 1.4% in November 2020 as an increase in shipment of Other household articles and toilet articles, of plastics (HS code 39249090), Electrical switches, of plastics (HS code 85365020) and Tableware and kitchenware of plastics (HS code 39241090) was more than offset by a decline in sales of Tooth brushes (HS code 96032100), Plastic moulded suit cases (HS code 42021220).

Cordage & fishnets export witnessed a rise of 2.7% in November 2020 on account of higher sales of Made up fishing nets of nylon (HS code 56081110) to Norway, Tanzania, and the United Arab Emirates; and of Made-up fishing nets of other materials (HS code 56081190) to Canada, Norway, and the United Kingdom.

Export of **Composites** was up by 1.2% 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 November 2020 were up 23.3% 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.

Export of **Human hair & related products** clocked an impressive 32.9% growth due to strong sales of Human hair, dressed, thinned, bleached or otherwise worked (HS code 67030010) to China.

Miscellaneous products export increased by 6.9% in November 2020 due to higher sales of Optical fibres, optical fibre bundles and cables (HS code 90011000) to Saudi Arabia and the United Kingdom; along with improved shipments of Polypropylene articles, nes (HS code 39269080) to the United States of America and Other building materials of plastic (HS code 39259090) to Greece and South Africa.

Export of **Pipes & fittings** witnessed a growth of 5.9% due to improved sales of Flexible tubes, pipes and hoses, and fittings therefor, of plastics (HS code 39173100); Rigid tubes, pipes and hoses, and fittings, of PVC (HS code 39172390); Flexible tubes, pipes and hoses, and fittings, of plastics, reinforced or otherwise combined with other materials (HS code 39173990); and Flexible tubes, pipes and hoses of plastics, not reinforced or otherwise combined with other materials (HS code 39173290).

Polyester films witnessed a decline of 5.9% in exports in November 2020 due to lower shipments of BOPET sheets and films, flexible plain (HS code 39206220); BOPP sheets and films, flexible plain (HS code 39202020); and Other plates, sheets, film, foil and strip, of plastic (HS code 39219099).

Plastics raw materials export fell by 45.0% in November 2020 due to lower shipments of Polypropylene (HS code 39021000); Polyethylene having a specific gravity of 0.94 or more (HS code 39012000); and Linear low-density polyethylene (HS code 39011010) 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 4.4% 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 Kingdom.

Export of **Woven sacks and FIBCs** fell by 6.4% during November 2020 due to decline in sales of Woven fabrics obtained from strip or the like (HS code 54072030, 54072040 and 54072090). Exports of FIBC (HS code 63053200) rebounded strongly in October and November 2020.

Export of **Writing instruments** slipped by 38.5% in November 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- Nov 19	Apr 20- Nov 20	Growth
		(USD Mn)	(USD Mn)	(%)
39076100	Polyethylene terephthalate: having a viscosity number of 78 ml/g or higher	524.4	-	NM
63053200	Flexible intermediate bulk containers	460.4	406.6	-11.7%
39021000	Polypropylene, in primary forms	348.7	518.0	+48.5%
39012000	Polyethylene with a specific gravity of >= 0.94	306.6	242.4	-21.0%
39232990	Sacks and bags, incl. cones, of plastics (excl. those of polymers of ethylene): Other	251.3	224.1	-10.8%
39011010	Linear low-density polyethylene (LLDPE)	245.3	89.2	-63.6%
39269099	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	216.9	174.8	-19.4%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	175.7	206.0	+17.2%
90011000	Optical fibres, optical fibre bundles and cables (excl. made-up of individually sheathed fibres of heading 8544)	159.2	131.5	-17.4%
48239019	Decorative laminates	135.0	123.7	-8.4%
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	144.4	136.2	-5.7%
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	86.7	59.3	-31.6%
39269080	Polypropylene articles, not elsewhere	115.2	115.9	+0.6%
39232100	Sacks and bags, incl. cones, of polymers of ethylene	108.0	98.3	-9.0%
39076990	Other, polyethylene terephthalate	111.4	95.1	-14.6%
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	104.0	93.0	-10.6%
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	114.5	67.9	-40.7%
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	100.0	129.1	+29.1%

HS Code	Description	Apr 19- Nov 19	Apr 20- Nov 20	Growth
		(USD Mn)	(USD Mn)	(%)
39011090	Polyethylene with a specific gravity of < 0.94: Other	113.0	32.4	-71.4%
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	91.8	24.4	-73.4%
90015000	Spectacle lenses of materials other than glass	91.5	75.3	-17.7%
96081019	Ball-point pens	82.4	54.0	-34.4%
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	81.0	74.1	-8.6%
39046100	Polytetrafluoroethylene, in primary forms	73.2	62.7	-14.3%
90183930	Cannulae	62.0	62.0	-0.0%
39241090	Tableware and kitchenware, of plastics: Other	62.4	50.2	-19.4%
96032100	Tooth brushes, incl. dental-plate brushes	57.6	41.5	-27.9%
39069090	Acrylic polymers, in primary forms (excl. polymethyl methacrylate): Other	55.8	63.6	+14.0%
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	53.7	67.4	+25.6%
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	57.4	52.5	-8.4%
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	51.0	48.3	-5.5%
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	48.5	38.9	-19.7%
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	52.9	47.9	-9.4%

HS Code	Description	Apr 19- Nov 19	Apr 20- Nov 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	39.3	84.9	+116.2%
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)	49.4	38.2	-22.7%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation	44.8	42.6	-5.0%
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	44.4	53.6	+20.8%
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	41.3	62.6	+51.7%
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	44.5	50.5	+13.4%
39072090	Polyethers, in primary forms (excl. polyacetals): Other	35.0	60.4	+72.5%
39241010	Insulated ware of plastics	35.0	29.8	-14.9%
39073010	Epoxy resins	42.8	24.8	-42.2%
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	47.4	16.3	-65.7%
39095000	Polyurethanes, in primary forms	37.2	36.3	-2.4%
39100090	Silicones in primary forms: Other	37.4	24.3	-35.1%
39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	32.3	33.3	+3.0%

HS Code	Description	Apr 19- Nov 19	Apr 20- Nov 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	34.5	37.2	+8.0%
39119090	Polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s., in primary forms: Other	32.2	35.0	+8.7%
39031990	Polystyrene, in primary forms (excl. expansible): Other	41.1	20.7	-49.6%
39269069	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	29.8	20.5	-31.4%

Source: Ministry of Commerce & Industry, Government of India

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