

ANALYSIS OF INDIA'S PLASTICS EXPORT

JULY 2025



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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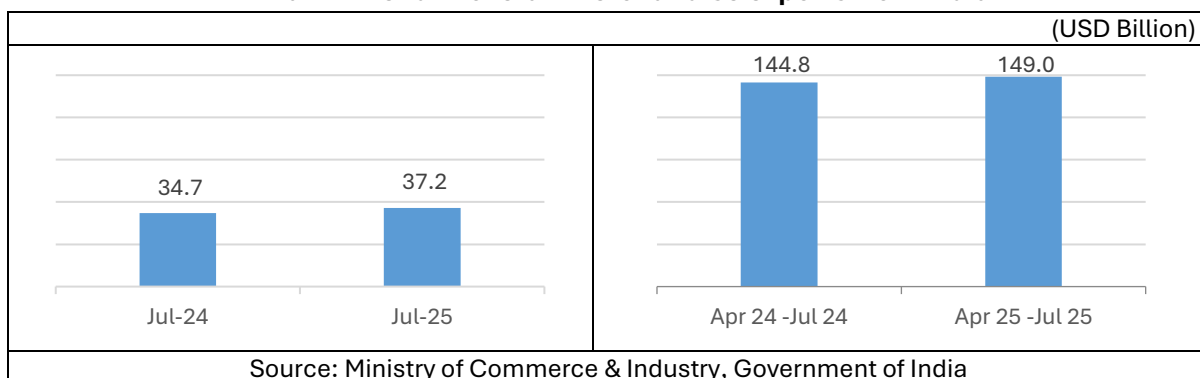
Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India.

| Key Findings |
|---|
| Plastic exports grew 12.8% in July 25, surpassing 7.3% growth in overall merchandise exports during the month. This is the highest growth in plastics exports since November 2024 |
| This marks the fourth consecutive month of growth in current financial year indicating strong demand for Indian plastic products globally. |
| 10 out of 13 product panels posted growth in exports led by strong rise in shipment of FIBC, Consumer & Houseware Products, Human Hair and Packaging Items |
| On the other hand, exports of cordage & fishnets, FRP & Composites and pipes & fittings recorded contraction in shipments. |
| Plastic films & Sheets and Writing Instruments posted recovery in exports in July 2025 from decline in shipments in the previous month (June 2025) |

TREND IN OVERALL EXPORTS

India's overall merchandise posted 7.3% growth during July 2025 led by strong increase in shipment of smartphones, pharma products, certain gems & jewelry, petroleum products, motor cars and other goods. Cumulative merchandise exports during Apr-Jul 2025 recorded 2.95% growth.

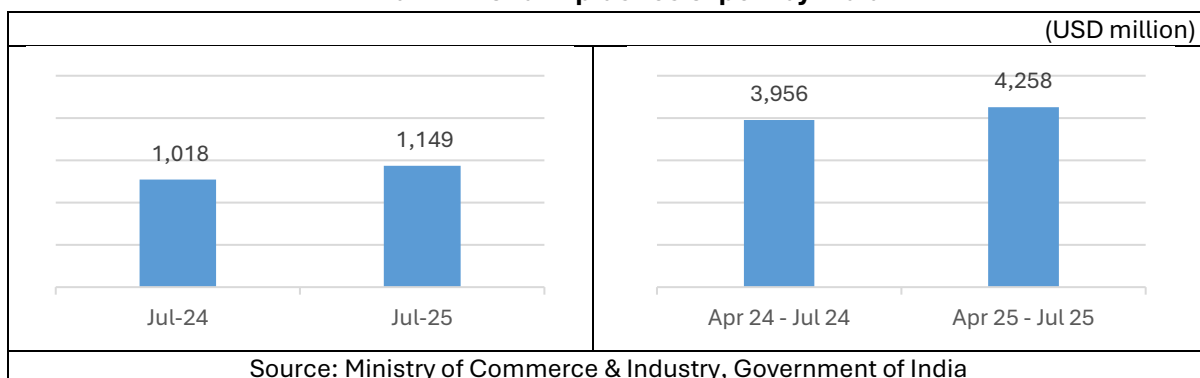
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During July 2025, India's plastic exports grew 12.8% to USD 1,148.62 million from USD 1017.98 million in the year ago month. This is the fourth consecutive monthly growth in this financial year and it is also the highest growth registered since November 2024. During the first four months of this financial year, plastic exports posted 7.6% growth to USD 4.26 billion from USD 3.96 billion in the year ago period.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In July 2025, 10 out of 13 product panels registered growth in exports, while the remaining recorded contraction in shipments. Specifically, FIBC & woven sacs, consumer & houseware products, writing instruments, human hair and packaging items posted double digit growth in exports. Other panels such as floor coverings, plastic medical items, films & sheets and raw materials witnessed single digit expansion in exports.

On the other hand, export of cordage, fishnets, FRP & composites and plastic pipes & fittings posted decline in shipments during the month as the following Exhibit shows.

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

| Panel | Jul-24 | Jul-25 | Growth | Apr 24-Jul-24 | Apr 25-Jul-25 | Growth |
|---|--------------|--------------|--------------|---------------|---------------|--------------|
| | USD million | | % | USD million | | % |
| Consumer & houseware products | 69.2 | 78.5 | +13.5% | 255.1 | 295.3 | +15.8% |
| Cordage, fishnets & monofilaments | 25.9 | 23.8 | -8.0% | 94.2 | 92.4 | -1.9% |
| FIBC, Woven sacks, Woven fabrics, Tarpaulin | 127.5 | 166.8 | +30.8% | 466.9 | 584.1 | +25.1% |
| Floorcoverings, leathercloth & laminates | 65.6 | 67.0 | +2.2% | 246.1 | 250.8 | +1.9% |
| FRP & Composites | 46.6 | 46.3 | -0.8% | 173.3 | 169.7 | -2.0% |
| Human hair & related products | 44.5 | 77.1 | +73.4% | 226.3 | 281.2 | +24.3% |
| Medical items of plastics | 47.4 | 52.1 | +9.9% | 181.2 | 188.1 | +3.8% |
| Miscellaneous products and items nes | 59.9 | 79.5 | +32.7% | 221.1 | 275.8 | +24.7% |
| Packaging items - flexible, rigid | 55.5 | 65.2 | +17.4% | 215.4 | 235.2 | +9.2% |
| Plastic films and sheets | 165.4 | 168.3 | +1.7% | 669.1 | 649.9 | -2.9% |
| Plastic pipes & fittings | 34.4 | 28.4 | -17.4% | 104.9 | 103.4 | -1.4% |
| Plastic raw materials | 257.7 | 272.9 | +5.9% | 1,020.0 | 1,045.6 | +2.5% |
| Writing instruments & stationery | 18.5 | 22.8 | +23.4% | 82.8 | 86.9 | +5.0% |
| Total | 1,018 | 1,149 | 12.8% | 3,956 | 4,258 | +7.6% |

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** witnessed 13.5% growth during the month led by strong increase in shipment of Toothbrushes (96032100) to Belgium, USA, Indonesia, Mexico and many other markets; Plastic Build ware materials (39259090) to UAE, UK; Switches of Plastics (85365020) to Germany, Indonesia & Brazil.

Cordage, Fishnets & Monofilaments posted negative export growth of (-)8.0% because of weak global demand for top products such as Nylon Fishing Nets (56081110), Polyethln/Polypropyln Cordage (56074900) and Monofilament Rods & Sticks (391690).

FIBC, Woven Sacks and Woven Fabrics posted healthy export growth of 30.8% as Indian suppliers benefited from strong orders from Germany, Spain, Netherland, USA and other countries for FIBC products made of manmade textile (63053200); There was also strong demand for Sacks and Bags of Plastics (39232990) in Tanzania, Sudan, Spain and other countries.

Shipment of **Floor Covering, Leather Cloth and Laminates** posted 2.2% growth led by increase in order inflows for Decorative Laminates (48239019) from Israel, UAE, USA and other markets;

rise in demand for PVC Coated Fabrics (59031090) from South Africa, Mexico, USA and other markets.

Export of **FRP and Composites** fell 0.8% in July 2025 because of drop in overseas demand for Other Plastic articles (392690) in USA, Canada, Brazil and other markets.

Export of **Human Hair & Related Products** grew 73.4% led by healthy growth in shipment of Unworked Human Hair (**05010010**) to Myanmar. Also, exporters benefited from recovery in overseas demand for Worked or Dressed Human Hair (67030010).

India recorded a 9.9% growth in exports of **Medical Items of Plastics** in July 2025, led by higher shipments of Catheters, cannulae of plastics (90183930) and Syringes of plastics (90183100). The growth was supported by a recovery in overseas demand after a contraction in the previous month, with key markets driving the rebound.

Miscellaneous Products & Items n.e.s. registered strong growth of 32.7% in July 2025, primarily driven by healthy demand for optical fibre bundles & cables (90011000) in the USA, UK, and China. In addition, Indian exporters benefited from a rebound in demand for PVC Belt Conveyors (39269010), particularly in Malaysia and China, further supporting the segment's overall performance.

Packaging Items – Flexible and Rigid posted a robust 17.4% growth in exports in July 2025, driven by higher demand for Articles for the conveyance or packaging of goods, of plastics (39239090) in the USA, along with strong shipments of Polyethylene Sacks & Bags (39232100) to the USA and Tanzania. The segment also gained from increased export orders of Carboys, Bottles, Flasks & Similar Articles (39233090) from Singapore and Nepal, reflecting steady recovery in packaging demand across key markets.

Shipments of **Plastic Films & Sheets** recorded a growth of 1.7% in July 2025, rebounding after a 5.7% decline in June 2025. The recovery was supported by higher exports of Plates, sheets, film, foil and strip of non-cellular plastics (39201019) and Plates, sheets, film, foil and strip of non-cellular polyesters (39206919), with demand from key overseas markets driving the upturn.

Exports of **Plastic Pipes & Fittings** fell by 17.4% in July 2025, mainly due to lower demand for fittings such as joints, elbows and flanges (39174000) and rigid tubes, pipes and hoses (39172990) in key overseas markets.

Exports of **Plastic Raw Materials** registered a growth of 5.9% in July 2025, supported by strong overseas demand for Epoxy Resins (39073010), Other Polyethers (39072990) and Linear Low-Density Polyethylene (LLDPE) (39014010). Increased orders from key international markets contributed to the overall rise in shipments.

Exports of **Writing Instruments & Stationery** rose sharply by 23.4% in July 2025, recovering from a 1.7% decline in June 2025. The growth was driven by higher shipments of Ball-point Pens (96081019 and 96081099), with strong demand from key overseas markets supporting the rebound.

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

| HS Code | Description | Apr 24-Jul-24 | Apr 25-Jul-25 | Growth |
|----------|---|------------------|---------------|--------|
| | | Values in USD Mn | | (%) |
| 63053200 | Flexible intermediate bulk containers | 272.0 | 354.2 | +30.2% |
| 67030010 | Human hair, dressed, thinned, bleached or otherwise worked | 180.9 | 194.9 | +7.7% |
| 39269099 | Other articles of plastics n.e.s | 170.8 | 168.0 | -1.7% |
| 39232990 | Other sacks and bags of plastics excl. those of polymers of ethylene | 144.6 | 173.1 | +19.7% |
| 39021000 | Polypropylene | 123.3 | 83.3 | -32.4% |
| 39076190 | Other primary form of polyethylene terephthalate | 95.3 | 91.3 | -4.3% |
| 48239019 | Decorative laminates | 104.7 | 112.1 | +7.1% |
| 90011000 | Optical fibres, optical fibre bundles and cables | 98.2 | 137.8 | +40.4% |
| 39206220 | Flexible and plain sheets and film of non-cellular polyethylene terephthalate | 92.8 | 74.1 | -20.2% |
| 39269080 | Polypropylene articles | 83.6 | 89.7 | +7.3% |
| 39069090 | Other acrylic polymers, in primary forms | 70.6 | 79.1 | +12.0% |
| 39202020 | Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced | 79.9 | 67.4 | -15.7% |
| 59039090 | Sacks and bags, incl. cones, of polymers of ethylene | 73.0 | 68.1 | -6.8% |
| 39232100 | Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane | 66.6 | 72.8 | +9.3% |
| 39239090 | Other articles for the conveyance or packaging of goods, of plastics | 66.6 | 71.9 | +8.0% |
| 05010010 | Human hair, unworked | 44.3 | 84.5 | +90.8% |
| 39014010 | Linear low density polyethylene (LLDPE) | 58.8 | 45.2 | -23.2% |
| 39202090 | Films and sheets of non-cellular polymers of ethylene, not reinforced | 55.6 | 53.4 | -4.0% |
| 90015000 | Spectacle lenses of materials other than glass | 56.9 | 57.5 | +1.1% |
| 90183930 | Cannulae | 45.2 | 54.8 | +21.1% |
| 39012000 | Polyethylene with a specific gravity of >= 0,94, | 38.6 | 38.8 | +0.6% |
| 39219099 | Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked | 46.7 | 43.8 | -6.1% |
| 96081019 | Ball-point pens | 42.6 | 42.6 | 0.0% |
| 39199090 | Other self-adhesive sheets and film of plastics, whether or not in rolls > 20 cm wide | 40.5 | 34.9 | -13.8% |
| 56074900 | Twine, cordage, ropes and cables of polyethylene or polypropylene | 38.1 | 38.7 | +1.4% |
| 39046100 | Polytetrafluoroethylene | 40.5 | 46.4 | +14.4% |

| HS Code | Description | Apr 24-Jul-24 | Apr 25-Jul-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 | 41.7 | 40.9 | -1.8% |
| 39076990 | Other primary form of polyethylene terephthalate | 40.8 | 44.2 | +8.4% |
| 39129090 | Other cellulose and chemical derivatives thereof, n.e.s., in primary forms | 35.0 | 45.9 | +30.9% |
| 39219094 | Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked | 35.0 | 34.8 | -0.5% |
| 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 | 32.0 | 29.9 | -6.6% |
| 39046990 | Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms | 36.2 | 36.8 | +1.7% |
| 39241090 | Other tableware and kitchenware, of plastics | 33.1 | 34.9 | +5.6% |
| 39206919 | Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported or similarly combined with other materials, not worked | 29.8 | 38.0 | +27.6% |
| 39206290 | Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported or similarly combined with other materials, without backing | 31.5 | 29.3 | -6.7% |
| 39072990 | Other polyethers n.e.s | 24.9 | 34.4 | +38.2% |
| 39140020 | Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or | 30.6 | 27.1 | -11.6% |
| 39095000 | Polyurethanes, in primary forms | 27.4 | 28.2 | +3.0% |
| 39206929 | Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported | 32.8 | 30.8 | -6.1% |
| 39204900 | Sheets and film of non-cellular polymers of vinyl chloride, containing by weight $< 6\%$ of plasticisers, not reinforced | 26.5 | 26.3 | -0.7% |
| 96032100 | Tooth brushes | 23.7 | 30.5 | +28.8% |
| 39119090 | Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s. | 27.8 | 30.4 | +9.4% |
| 59031090 | Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride | 24.6 | 26.6 | +7.8% |
| 39219096 | Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials | 25.7 | 28.7 | +12.0% |

| HS Code | Description | Apr 24-Jul-24 | Apr 25-Jul-25 | Growth |
|----------|---|------------------|---------------|--------|
| | | Values in USD Mn | | (%) |
| 39201019 | Other sheets and film of non-cellular plastics | 26.7 | 28.4 | +6.4% |
| 39235010 | Caps and closures for bottles | 26.4 | 22.7 | -13.9% |
| 39011090 | Other polyethylene with a specific gravity of < 0.94, in primary forms | 25.3 | 29.2 | +15.2% |
| 39172390 | Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other | 21.6 | 24.3 | +12.8% |
| 39076930 | PET flake (chip) | 21.2 | 35.9 | +69.3% |
| 39241010 | Tableware and kitchenware, of plastics: Insulated ware | 17.3 | 22.8 | +32.2% |

Source: Ministry of Commerce & Industry, Government of India

Exhibit 5: Reasons for major decline in plastic products exports

| HS Code | Description | Apr 24- Jul 24 | Apr 25 – Jul 25 | Reasons for decline |
|----------|---|-------------------|--------------------|---|
| | | (USD Mn) | | |
| 39021000 | Polypropylene | 123.3 | 83.3 | Exports have fallen because of weak demand in Turkey, Viet Nam, Portugal and Sri Lanka, which are some of India’s major markets. Also, export restrictions to Bangladesh via land borders has reduced overseas shipments of 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) | 58.8 | 45.2 | Exports have posted positive growth in July this year after falling in the preceding three months (Apr-June 2025). Exports have declined during April-June because of slowdown in demand in key markets such as China and Viet Nam. Export restriction via land border to Bangladesh has also contributed to decline in shipments. 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 | 92.8 | 74.1 | Indian exporters are facing weak demand in European countries such as Spain, Italy and Germany, which has caused decline in exports. Additionally, the recent fire incident at the production unit of the leading manufacturer Jindal Films affected exports, primarily of BOPP films |
| 39202020 | Flexible and plain sheets and film of non-cellular polymers of ethylene | 79.9 | 67.4 | There is weak demand for this product in UK, which is the second largest market for this product. Also, exporters are facing lower demand from Spain and Colombia in recent months. Additionally, the recent fire incident at the production unit of the leading manufacturer Jindal Films affected exports, primarily of BOPP films |

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

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