

ANALYSIS OF INDIA'S PLASTICS EXPORT

March 2026



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

India’s plastics exports fell by 14.4%, marking the steepest decline in four months since October 2025. The downturn was driven by the West Asian crisis, which disrupted key shipping lanes, left cargo stranded at ports and at sea, sharply increased freight and insurance costs, and prevented exporters from fulfilling orders.

Shipments to key West Asian markets—including the UAE, Saudi Arabia, Turkey, and Egypt that together account for 10% of India’s plastics exports – came to a standstill.

Even typically resilient segments such as Consumer & Houseware products and FIBC were hit due to container shortages and surging freight and insurance costs for major destinations like the USA, UK, Germany, and other European markets.

Shortages of raw materials, coupled with a sharp rise in the cost of key inputs, further intensified the challenges for exporters and hindered their ability to fulfil orders.

Amid these challenges, Human Hair and Miscellaneous Plastic Products stood out as the only segments to show resilience, recording positive growth in shipments despite the adverse conditions.

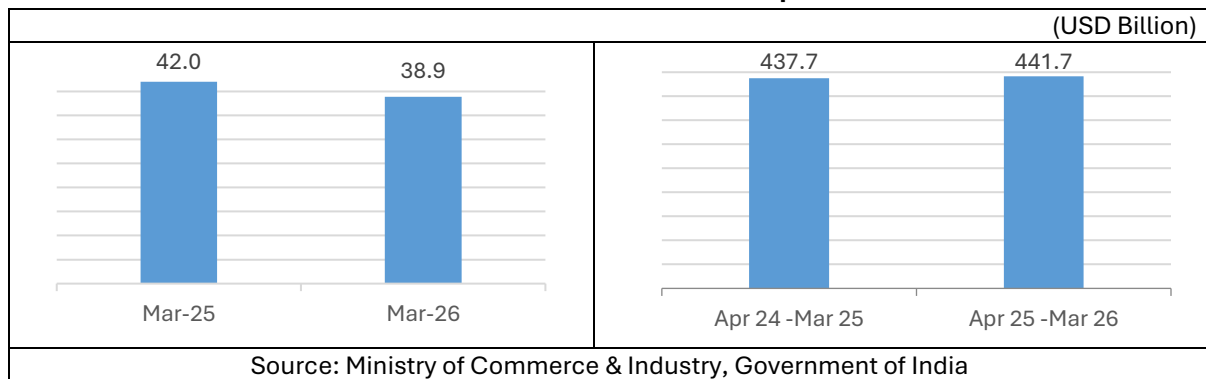
Exports of plastic and allied products ended FY26 with a marginal 0.3% decline, weighed down by multiple challenges including high US tariffs, non-tariff barriers in Mexico, rising competition from ASEAN countries, raw material shortages, and the West Asia crisis.

TREND IN OVERALL EXPORTS

India’s merchandise exports declined 7.4% to USD 38.91 billion in March 2026 from USD 42.04 billion in the year ago month led by fall in shipment of Smart phones, Cut or Processed Diamond, Gold Jewellery, Motor Cars, Aviation Turbine Fuels, Naptha and other petroleum products.

Cumulative exports during April 2025 -March 2026 posted 0.92% growth to USD 441.73 billion from the year ago period.

Exhibit 1: Trend in overall merchandise exports from India

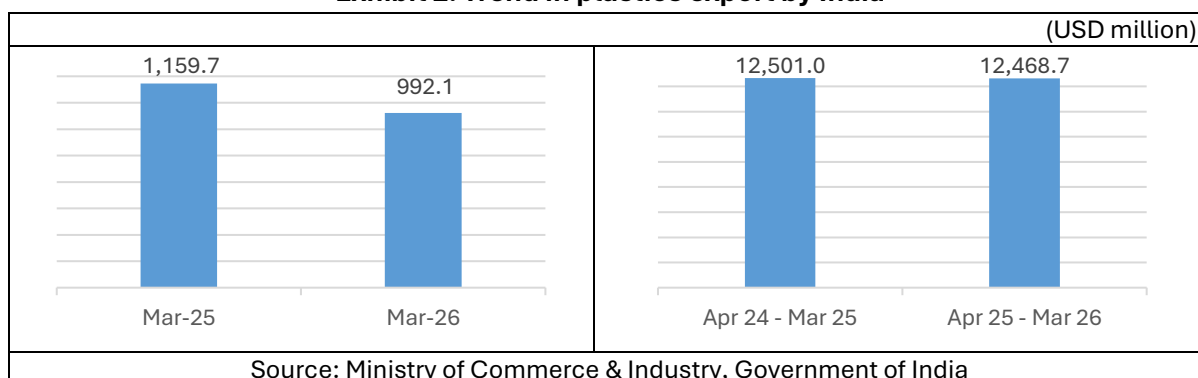


TREND IN PLASTICS EXPORT

India’s plastics and allied product exports declined 14.4% in March 2026 to USD 992.13 million from USD 1159.65 million in the year ago month because of sharp fall in shipments across most product categories amidst disruption in shipping route due to the West Asia crisis.

Cumulative exports during April 2025 -March 2026 posted 0.3% decline to USD 12,468.7 million from USD 12,501.0 million in the year ago period because of contraction in shipment of Raw Materials, Plates & Sheets, Floor Coverings, Packaging Products, Medical Items and other products.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

There was 14.4% decline in export of Plastic and Allied Product during March 2026 because of contraction in shipment of Plastic Raw Materials, Films & Sheets, FIBC, Consumer & Houseware products, Packaging Items, Floor Coverings, and Cordage & Fishnets.

Human Hair and Miscellaneous Products & Items are the only two categories that posted positive growth during the month under review.

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

Panel	Mar -25	Mar -26	Growth	Apr 24- Mar -25	Apr 25- Mar -26	Growth
	USD million		%	USD million		%
Consumer & houseware products	73.1	69.7	-4.5%	790.7	872.6	+10.4%
Cordage, fishnets & monofilaments	26.1	22.8	-12.6%	302.7	275.4	-9.0%
FIBC, Woven sacks, Woven fabrics, Tarpaulin	145.3	131.3	-9.6%	1,572.1	1,772.4	+12.7%
Floorcoverings, leathercloth & laminates	66.2	46.3	-30.1%	763.9	671.0	-12.2%
FRP & Composites	50.5	37.2	-26.3%	516.0	479.1	-7.1%
Human hair & related products	92.6	93.9	+1.4%	791.8	942.8	+19.1%
Medical items of plastics	52.8	41.3	-21.8%	551.4	539.5	-2.2%
Miscellaneous products and items nes	68.7	92.6	+34.8%	686.2	903.4	+31.7%
Packaging items - flexible, rigid	62.8	52.4	-16.5%	684.5	676.7	-1.1%
Plastic films and sheets	190.7	165.4	-13.2%	2,027.1	1,888.2	-6.9%
Plastic pipes & fittings	35.7	27.3	-23.6%	334.5	313.4	-6.3%
Plastic raw materials	271.0	188.1	-30.6%	3,208.7	2,894.9	-9.8%
Writing instruments & stationery	24.3	23.7	-2.5%	271.6	239.3	-11.9%
Total	1,159.7	992.1	-14.4%	12,501.0	12,468.7	-0.3%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** declined 4.5% due to container shortage and high freight cost, which affected shipments to US, Europe and the Middle East. Particularly, there was sharp fall in shipment of Tableware & Kitchenware (HS 39241090) to USA, the single largest market for this product. Also, there was slowdown in demand for Plastic Moulded Suitcases (HS 42021220) in Belgium, Canada, Australia and other key markets.

Shipment of **Cordage, Fishnets & Monofilaments** fell 12.6% because of lower order inflows for Polyethylene or Polypropylene Cordage (HS 56074900) from Chile, UAE, the Netherlands and other prominent markets. There was also subdued demand for Monofilaments (HS 39169028) in USA and Bangladesh.

FIBC, Woven Sacks and Woven Fabrics witnessed 9.6% decline in shipment because exporters struggled to make shipment of Sacks & Bags (HS 39232990) to Ethiopia, USA, Spain and other countries amidst disruption in shipping route. Also, exporters faced dwindling demand for FIBC (HS 63053220) in USA and Belgium.

Export of **Floor Covering, Leather Cloth and Laminates** contracted 30.1% because of weak demand condition for Other PVC articles (HS 39181090) in USA, which accounts for more than 70% of exports. There was also lower shipment of Plastic Coated Fabrics (HS 59031010) to Saudi Arabia because of West Asia Crisis. Shipment of Other Plastic Coated Fabrics (HS 59039010) also suffered due to poor demand condition in Indonesia.

Export of **FRP and Composites** declined 26.3% because the lingering tariff uncertainty in USA affected shipment of Other Plastic Articles (HS 39269099) to this single largest market. There was also subdued demand in neighbouring markets such as Nepal and Bhutan which are leading markets for Tanks, Vats & other containers (HS 39251000)

Shipment of **Human Hair & Related Products** is one of the two segments that posted positive growth (1.4%) as exporters benefitted from strong order inflows for Raw Human Hair (HS 05010010) from Bangladesh and Myanmar; Exporters also benefitted from emerging demand from new markets such as Azerbaijan and Bhutan for Value Added Hair products (HS 67042090) and (HS 67041990)

Export of **Medical Items of Plastics** declined 21.8% as cargoes were stranded mid-sea amidst the West Asia crisis, which affected shipments of Catheters (HS 901839) to USA and Turkey; Exporters also faced subdued orders from Belgium, Ethiopia and Argentina for Blood Transfusion Apparatus (HS 90189032).

Miscellaneous plastic products and items (n.e.s.) is one of the two categories that witnessed positive export growth (34.8%) because of strong demand in USA, Poland and China for Optical Fibres (HS 90011000). Also, there was robust order inflows for PVC Belt Conveyor (HS 39269010) from Canada, South Africa and China.

Shipment of **Flexible and Rigid Packaging Items** contracted 16.5% because of weak demand condition in Japan and Canada for Packaging Articles (HS 39239090); Exporters are also facing lower order inflows from USA and France for this product. Market for Sacks & Bags (HS 39232100) also remains sluggish in the single largest market, USA. Shipment of Bottle Caps & Closures to nearby markets such as Saudi Arabia and UAE are affected by the West Asia crisis. Also, there was lower sales of this product to Sri Lanka, Nepal and Egypt.

Export of **Plastic films and sheets** declined 13.2% because of supply chain constraints and domestic shortage of this product. Also, importers in USA and Mexico chose to hold export orders for Plain, Flexible Plates & Sheets (HS 39202020) because of tariff uncertainty. In December 2025, Mexico announced additional tariff, over and above its MFN tariff, on imports from all countries with which it does not have free trade agreement. Exporters also faced subdued demand in Japan and China for Propylene Plates & Sheets (HS 39202090).

Exports of **Plastic pipes and fittings** declined 23.6% because of the adverse impact of the West Asia crisis. West Asian markets such as Saudi Arabia, UAE and Iraq are major destinations accounting for 15% of overall Pipes and Fittings exports. Especially, shipment of Other PVC Tubes and Pipes (HS 39172390) to Iraq, UAE and Egypt was affected. Export of Other Pipes & Tubes (HS 39173990) to Saudi Arabia and UAE came to a standstill. Also, exporters are facing weak demand for this product in France and Malaysia.

Plastic raw material exports declined more than 30% as shipments to West Asian countries was affected by the regional conflict and disruption to shipping routes. Shipment to key markets such as UAE, Turkey, Saudi Arabia and Egypt was hit by this crisis. Also, acute domestic shortage and sharp rise in prices of key raw materials severely affected overseas sales.

Particularly, shipment of Polyacetals, Polyethers and Epoxide Resins (HS 39076190) was affected to UAE, Saudi Arabia, Israel, Iraq and other markets. Export of Polypropylene (HS 39201000) to Turkey was hit by the shipping route disruption and domestic shortage.

Export of **Writing instruments and stationery** declined 2.5% because of sharp rise in freight and insurance cost to far-off markets such as USA, France and Brazil that account for 35% of total exports. Specifically, export of Other Office or School supplies (HS 39261099) declined to USA, Germany, Canada and other markets. Export of Ball Point Pens (HS 96081099) to Brazil and UAE was affected due to high freight cost.

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

Code	Description	Apr 24- Mar-25	Apr 25- Mar-26	Growth
		Values in USD Mn		(%)
'63053200	Flexible intermediate bulk containers, for the packing of goods, of synthetic or man-made textile materials	928.2	1,074.5	+15.8%

Code	Description	Apr 24- Mar-25	Apr 25- Mar-26	Growth
		Values in USD Mn		(%)
'67030010	Human hair, dressed, thinned, bleached or otherwise worked; wool, other animal hair or other textile materials, prepared for use in making wigs or the like (excl. natural plaits of human hair, whether or not washed and degreased, but not otherwise processed): Human hair, dressed, thinned, bleached or	589.4	651.7	+10.6%
'39269099	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	507.1	472.0	-6.9%
'39232990	Sacks and bags, incl. cones, of plastics (excl. those of polymers of ethylene): Other	485.2	532.0	+9.7%
'39021000	Polypropylene, in primary forms	376.7	239.9	-36.3%
'39076190	Other primary form	320.3	229.5	-28.4%
'48239019	Paper, paperboard, cellulose wadding and webs of cellulose fibres, in strips or rolls of a width <= 36 cm, in rectangular or square sheets, of which no side > 36 cm in the unfolded state, or cut to shape other than rectangular or square, and articles of paper pulp, paper, cellulose wadding or webs of cellulose fibres, n.e.s.: Decorative laminates	317.1	355.9	+12.2%
'90011000	Optical fibres, optical fibre bundles and cables (excl. made-up of individually sheathed fibres of heading 8544)	298.4	541.6	+81.5%
'39206220	Plates, sheets, film, foil and strip, of non-cellular poly"ethylene 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 poly"methyl methacrylate", self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Flexible , plain	264.2	196.2	-25.7%
'39269080	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Polypropylene articles , not elsewhere	260.6	215.1	-17.5%
'39069090	Acrylic polymers, in primary forms (excl. poly"methyl methacrylate"): Other	251.4	242.6	-3.5%
'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	239.0	194.0	-18.8%
'59039090	Textile fabrics impregnated, coated, covered or laminated with plastics other than poly"vinyl 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	218.7	149.4	-31.7%
'39232100	Sacks and bags, incl. cones, of polymers of ethylene	218.6	196.6	-10.0%

Code	Description	Apr 24- Mar-25	Apr 25- Mar-26	Growth
		Values in USD Mn		(%)
'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	211.6	213.9	+1.1%
'05010010	Human hair, unworked; whether or not washed or scoured	197.9	287.0	+45.0%
'39014010	Linear low density polyethylene (LLDPE), in which ethylene monomer unit contributes less than 95 % by weight of the total polymer content	178.0	96.9	-45.6%
'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	163.9	152.7	-6.8%
'90015000	Spectacle lenses of materials other than glass	159.2	164.0	+3.0%
'90183930	Needles, catheters, cannulae and the like, used in medical, surgical, dental or veterinary sciences (excl. syringes, tubular metal needles and needles for sutures): Cannulae	150.6	163.3	+8.4%
'39012000	Polyethylene with a specific gravity of $\geq 0,94$, in primary forms	143.0	111.0	-22.4%
'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	140.2	123.8	-11.7%
'96081019	Ball-point pens (detailed label not available)	134.0	126.5	-5.6%
'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	130.9	118.2	-9.7%
'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 (excl. binder or baler twine)	130.5	113.5	-13.1%
'39046100	Polytetrafluoroethylene, in primary forms	129.3	133.5	+3.3%
'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	126.6	122.6	-3.2%
'39076990	Other primary form	125.6	121.5	-3.2%
'39129090	Cellulose and chemical derivatives thereof, n.e.s., in primary forms (excl. cellulose acetates, cellulose nitrates and cellulose ethers): Other	120.5	140.9	+16.9%
'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	114.7	104.4	-9.0%

Code	Description	Apr 24- Mar-25	Apr 25- Mar-26	Growth
		Values in USD Mn		(%)
'39181090	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, consisting of a layer of plastic fixed permanently on a backing of any material other than paper, the face side of which is grained, embossed, coloured, design-printed or otherwise decorated", of polymers of vinyl chloride: Other	111.8	54.2	-51.5%
'39046990	Fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms (excl. polytetrafluoroethylene): Other	105.0	97.5	-7.1%
'39241090	Tableware and kitchenware, of plastics: Other	103.6	95.8	-7.6%
'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	98.9	109.3	+10.5%
'39206290	Plates, sheets, film, foil and strip, of non-cellular poly"ethylene 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 poly"methyl methacrylate", self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Other	96.2	80.2	-16.6%
'39072990	Other polyethers n.e.s	93.6	66.5	-29.0%
'39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or	87.7	87.5	-0.3%
'39095000	Polyurethanes, in primary forms	84.9	85.9	+1.2%
'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 (excl. polycarbonates, polyethylene terephthalate and other unsaturated polyesters, self-adhesive products, and floor, wall and ceiling coverings in heading 3918): Other	84.5	85.7	+1.3%
'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)	83.1	84.5	+1.6%
'96032100	Tooth brushes, incl. dental-plate brushes	79.2	91.8	+16.0%
'39119090	Polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s., in primary forms: Other	78.7	76.7	-2.4%

Code	Description	Apr 24- Mar-25	Apr 25- Mar-26	Growth
		Values in USD Mn		(%)
'59031090	Textile fabrics impregnated, coated, covered or laminated with poly"vinyl chloride" (excl. wall coverings of textile materials impregnated or covered with poly"vinyl chloride"; floor coverings consisting of a textile backing and a top layer or covering of poly"vinyl chloride"): Other	76.7	80.5	+4.9%
'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	76.1	85.0	+11.8%
'39201019	Plates, sheets, film, foil and strip, of non-cellular plastics, 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	74.4	87.1	+17.1%
'39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	74.2	70.5	-4.9%
'39011090	Polyethylene with a specific gravity of < 0,94, in primary forms: Other	73.9	91.5	+23.8%
'39172390	Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other	72.0	74.7	+3.8%
'39076930	PET flake (chip)	71.5	60.6	-15.3%
'39241010	Tableware and kitchenware, of plastics: Insulated ware	69.9	80.4	+15.0%

Source: Ministry of Commerce & Industry, Government of India

Exhibit 5: Reasons for major decline in plastic products exports

HS Code	Description	Apr 24- Mar 25	Apr 25- Mar 26	Reasons for decline
		(USD Mn)		
'39021000	Polypropylene, in primary forms	376.7	239.9	India is import dependent for this raw material due to shortfall of domestic production to meet high local demand. In recent weeks, the West Asian crisis further aggravated the shortage, thereby leading to sharp price increase; As a result, exports declined sharply
'39076190	Other primary form	320.3	229.5	The sustained fall in shipment of this product was due to domestic production constraints and rise in prices in the local market. Therefore, some exporters preferred to meet local demand due to higher price realisation in the domestic market.
'39014010	Linear low density polyethylene (LLDPE), in which ethylene monomer unit contributes less than 95 % by	178.0	96.9	India is a net importer of this product due to domestic shortage. As a result, there was sharp decline in overseas sales to meet rising local demand

HS Code	Description	Apr 24- Mar 25	Apr 25- Mar 26	Reasons for decline
		(USD Mn)		
	weight of the total polymer content			
'59039090	Textile fabrics impregnated, coated, covered or laminated with plastics other than poly"vinyl 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	218.7	149.4	<p>Shipment was affected due to high tariff in USA between August 2025 till January 2026. USA is the single largest market accounting for 83% of shipment of this product.</p> <p>In recent weeks, West Asian crisis affected shipments to UAE, which is the second largest market for this product.</p>
'39206220	Plates, sheets, film, foil and strip, of non-cellular poly"ethylene 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 poly"methyl methacrylate", self-adhesive products, and floor, wall and ceiling coverings of heading 3918): Flexible , plain	264.2	196.2	<p>Exports declined because of intensifying competition in Spain and Italy, which are prominent markets for this product.</p> <p>Indian exporters also lost some contracts in the US market amidst high tariff till January 2026.</p> <p>Non-tariff barriers in Mexico affected shipments to this fourth largest destination. Mexico announced higher tariff (over and above the MFN duty) and import security fee on imports from non-FTA countries earlier in December 2025.</p>
'39181090	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, consisting of a layer of plastic fixed permanently on a backing of any material other than paper, the face side of which is grained, embossed, coloured, design-printed or otherwise decorated", of polymers of vinyl chloride: Other	111.8	54.2	<p>Exports declined as exporters struggled to sustain orders from the United States, which accounts for about 77% of overseas sales of this product.</p> <p>The sharp increase in U.S. tariffs after August 2025 significantly eroded the price competitiveness of Indian exporters in this key market.</p> <p>Shipments to UAE and Saudi Arabia, which are the other prominent markets, was affected by West Asia crisis in March 2026.</p>
'39269080	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Polypropylene articles , not elsewhere	260.6	215.1	<p>Exports declined because of loss of competitiveness owing to high raw material prices (Polypropylene prices) in the domestic market.</p> <p>India is facing stiff competition from China, Mexico, Canada, Viet Nam, Thailand and other leading suppliers in this product category</p>

HS Code	Description	Apr 24- Mar 25	Apr 25- Mar 26	Reasons for decline
		(USD Mn)		
				Also, high freight cost to far off destinations such as Brazil, Canada and Mexico have affected shipments

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

-----**End of report**-----