

ANALYSIS OF INDIA'S PLASTICS EXPORT
NOVEMBER 2025



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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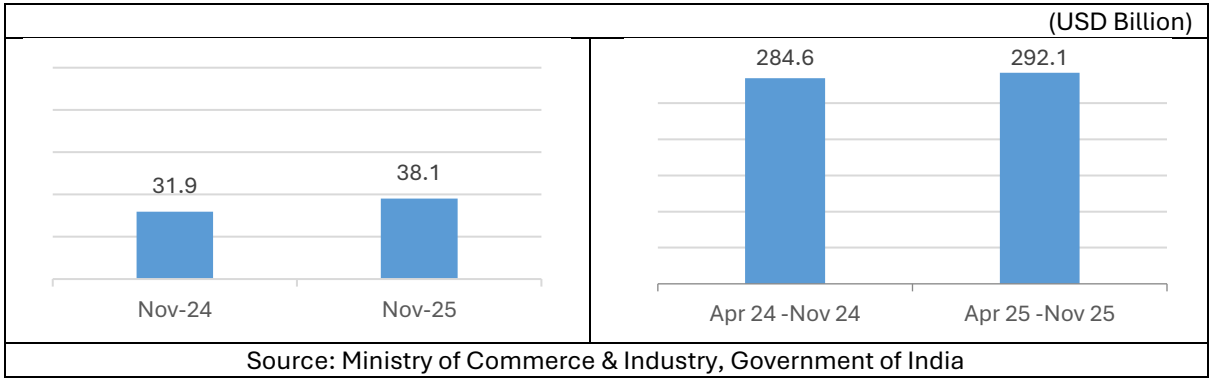
Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India.

Key Findings
After declining for two consecutive months (Sept-Oct), India's plastic exports rebounded with 8% growth in November 2025, demonstrating resilience in the face of the US tariff impact
Exports of Cordage & fishnets and FRP & Composites posted growth in November after six months of contraction or stagnation, with the last positive performance recorded in April this year.
In the US market, exporters benefitted from strong order inflows for select products such as Optical Fibres, Bundles and Cables (HS 90011000) and Syringes (HS 901831)

TREND IN OVERALL EXPORTS

India's merchandise exports posted 19.37% growth to USD 38.13 billion in November 2025 from USD 31.94 billion in the year ago month led by rise in shipments of petroleum, engineering goods, gems & jewellery, pharmaceuticals, chemicals, textiles, handicrafts and many agro commodities. During April-November 2025, exports posted 2.62% growth to USD 292.07 billion from the year ago period.

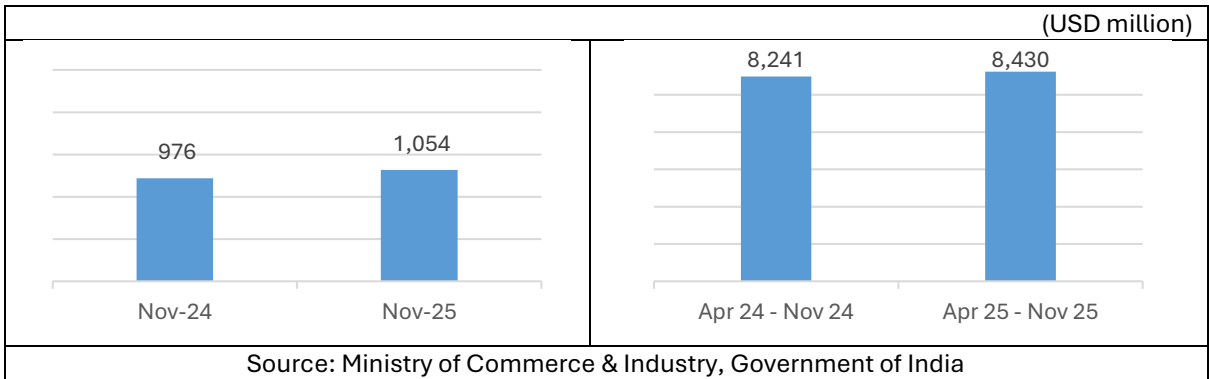
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During November 2025, India's plastic exports posted 8% growth to USD 1054 million from USD 976 million in the year ago month. Cumulative exports during April-November 2025 posted 2.3% growth to USD 8,429.7 million from USD 8,241.0 million in the year ago period led by strong growth in shipment of FIBC, Consumer & Houseware products, Human Hair and other panels.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In November 2025, exports of plastics and related products recorded overall growth compared to the previous year. The expansion was driven by strong performance in value-added segments such as miscellaneous products, writing instruments & stationery, FIBC and woven products, and consumer & houseware items. Human hair & related products and FRP & composites also showed healthy growth during the month. However, exports of plastic raw materials declined, and floorcoverings, leathercloth & laminates witnessed a contraction. Despite these challenges, the positive momentum in downstream and value-added segments supported the overall export performance in November 2025.

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

Panel	Nov-24	Nov -25	Growth	Apr 24- Nov -24	Apr 25- Nov -25	Growth
	USD million		%	USD million		%
Consumer & houseware products	58.8	74.6	+26.9	508.2	579.1	+14.0
Cordage, fishnets & monofilaments	22.3	23.3	+4.9	200.7	185.5	-7.6
FIBC, Woven sacks, Woven fabrics, Tarpaulin	115.7	152.1	+31.5	1,009.3	1,197.9	+18.7
Floorcoverings, leathercloth & laminates	57.1	52.5	-8.0	503.0	453.6	-9.8
FRP & Composites	34.2	39.4	+15.2	346.6	331.8	-4.3
Human hair & related products	67.8	80.1	+18.2	496.3	591.3	+19.1
Medical items of plastics	42.0	43.6	+3.9	369.3	372.4	+0.8
Miscellaneous products and items nes	53.2	75.1	+41.1	446.1	580.8	+30.2
Packaging items - flexible, rigid	50.8	56.6	+11.3	449.0	469.5	+4.6
Plastic films and sheets	152.8	161.0	+5.3	1,350.7	1,261.2	-6.6
Plastic pipes & fittings	24.0	26.1	+8.5	218.1	208.2	-4.5
Plastic raw materials	282.5	249.5	-11.7	2,151.1	2,036.7	-5.3
Writing instruments & stationery	15.0	20.0	+33.3	192.5	161.7	-16.0
Total	976.2	1,053.9	+8.0	8,241.0	8,429.7	+2.3

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & Houseware Products** posted 26.9% growth because exporters started diversifying shipments of Tableware & Kitchenware (HS 392410) to Benin, Senegal, Germany and other markets. Also, there is strong demand for Tooth Brushes (HS 96032100) and other consumer goods in Belgium, UAE and the Netherlands. There is also strong demand for Building materials of plastics (HS 39259090) in USA despite hike in tariff.

Export of **Cordage, Fishnets & Monofilaments** recorded 4.9% growth (second monthly growth this year after April) led by strong order inflows for Monofilaments (HS 39169090) from Germany and emerging demand in Indonesia, Australia. There is also rise in demand for Other Twines and Cordage (HS 56081900) in Norway. Indian exporters also benefited from sustained demand for Other Cordage (HS 56074900) in Morocco.

Shipment of **FIBC, Woven Sacks and Woven Fabrics** grew 31.5% as exporters benefitted from strong demand for FIBC (HS 63053200) in Norway, Spain and other countries. Exporters also diversified shipments of Sacks and Bags (HS 39232990) to Sudan, Tanzania, besides other markets such as UAE and Senegal.

Export of **Floor Covering, Leather Cloth and Laminates** declined 8.0% because of sharp fall in shipments of Other Floorcovering (HS 59039090) to USA amidst hike in tariff. There was also lower demand for PVC Floor and Wall Coverings (HS 39181090) in UAE and Italy, besides USA.

Export of **FRP and Composites** posted 15.2% growth during November 2025 (first monthly growth after April this year) because of strong demand for Other Plastic Products (HS 39269099) in UAE, UK, Saudi Arabia and other countries. Exporters also benefited from growing order inflows from Georgia, Lithuania, Latvia and Panama for FRP and Composite products.

Human Hair & Related Products recorded 18.2% rise in shipments led by strong demand for value added Human Hair (HS 67030010) in Indonesia and Viet Nam. Exporters also benefited from robust demand for Raw Human Hair (HS 05010010) in Bangladesh.

Medical Items of Plastics witnessed 3.9% rise in exports during November this year as exporters benefited from healthy demand for Catheters (HS 901839) in Brazil, Russia and Algeria, despite decline in shipments to USA. There was also strong order inflows for Syringes (HS 901831) from Switzerland, Germany, Sudan and Canada. Even USA demand remained resilient for this product.

Miscellaneous Products & Items n.e.s. posted 41.1% growth in shipments led by robust demand for Optical Fibres Bundles and Cables (HS 90011000) in USA, China, Poland and Morocco. This product has a large share of 67% in the total export of this panel. As a result of remarkable growth in exports of this product, its share in this panel has grown from 49% in November last year.

Packaging Items – Flexible and Rigid recorded 11.3% rise in exports driven by strong demand for Stoppers, Lids and Caps (HS 392350) in Kenya and recovering demand for this product in UAE and China. Exporters are also benefiting from robust order inflows for Other Conveyance or Packaging items (HS 39239090) from Russia, Cote D'Ivoire, UAE and other countries.

Plastic Films & Sheets posted 5.3% export growth led by encouraging demand for Packaging Film (HS 39206919) in Israel, Ghana and Spain. There is also increase in order inflows for Propylene Plates and Sheets (HS 39202090) from UAE, Mexico, Nigeria and Australia.

Shipment of **Plastic Pipes & Fittings** witnessed 8.5% growth because of strong rise in shipment of Other PVC Tubes, Pipes and Hoses (HS 39172390) to Oman, Kenya, UAE and other markets. Also, there is growth in exports of Flexible Tubes and Pipes (HS 39173100) to Singapore, besides recovery in demand in China. Indian exporters are also experiencing rising demand for Polyethylene Tubes (HS 39172110) in Congo, Canada, Australia, UK, Russia and other markets.

Plastic Raw Materials exports declined 11.7% as exporters reduced overseas sales to meet shortage in the domestic market. Specifically, exporters curtailed shipment of Other PET (HS 39076190) to UAE and Nepal. Exporters have also reduced shipment of Polypropylene (HS 39021000) to Turkey, Nepal and Viet Nam; and Polyethylene (HS 39012000) to Viet Nam and China.

Shipment of **Writing Instruments & Stationery** grew a whopping 33.3% because of strong demand for Other Liquid Ink Ball Point Pens (HS 96081019) in Colombia; Exporters also benefitted from recovery in demand for this product in Algeria and Russia.

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

HS Code	Description	Apr 24- Nov-24	Apr 25- Nov 25	Growth
		Values in USD Mn		(%)
63053200	Flexible intermediate bulk containers	600.5	727.1	+21.1%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	370.1	407.7	+10.2%
39269099	Other articles of plastics n.e.s	341.7	327.3	-4.2%
39232990	Other sacks and bags of plastics excl. those of polymers of ethylene	307.6	364.7	+18.6%
39021000	Polypropylene	261.2	189.1	-27.6%
39076190	Other primary form of polyethylene terephthalate	219.5	168.2	-23.3%
48239019	Decorative laminates	209.3	233.4	+11.5%
90011000	Optical fibres, optical fibre bundles and cables	201.1	327.8	+63.0%
39206220	Flexible and plain sheets and film of non-cellular polyethylene terephthalate	181.1	129.2	-28.7%
39269080	Polypropylene articles	168.3	160.9	-4.4%
39069090	Other acrylic polymers, in primary forms	165.2	158.3	-4.2%
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene, not reinforced	158.5	130.0	-18.0%
59039090	Sacks and bags, incl. cones, of polymers of ethylene	143.7	102.3	-28.8%
39232100	Other textile fabrics impregnated, coated, covered or laminated with plastics other than polyvinyl chloride or polyurethane	146.3	138.5	-5.4%
39239090	Other articles for the conveyance or packaging of goods, of plastics	136.5	144.0	+5.5%
05010010	Human hair, unworked	123.1	180.7	+46.8%
39014010	Linear low density polyethylene (LLDPE)	134.7	81.1	-39.8%
39202090	Films and sheets of non-cellular polymers of ethylene, not reinforced	110.3	103.2	-6.5%
90015000	Spectacle lenses of materials other than glass	107.4	108.8	+1.2%
90183930	Cannulae	95.8	110.9	+15.8%
39012000	Polyethylene with a specific gravity of ≥ 0.94 ,	99.6	79.0	-20.7%
39219099	Other sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	96.9	84.9	-12.4%
96081019	Ball-point pens	91.3	84.4	-7.6%
39199090	Other self-adhesive sheets and film of plastics, whether or not in rolls > 20 cm wide	86.7	75.4	-13.0%
56074900	Twine, cordage, ropes and cables of polyethylene or polypropylene	85.0	77.3	-9.1%
39046100	Polytetrafluoroethylene	84.8	94.8	+11.7%
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	82.6	76.4	-7.5%
39076990	Other primary form of polyethylene terephthalate	81.1	79.9	-1.4%

HS Code	Description	Apr 24- Nov-24	Apr 25- Nov 25	Growth
		Values in USD Mn		(%)
39129090	Other cellulose and chemical derivatives thereof, n.e.s., in primary forms	75.8	91.0	+20.0%
39219094	Flexible and metallised sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials, unworked	76.5	68.5	-10.5%
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	73.9	42.8	-42.1%
39046990	Other fluoro-polymers of vinyl chloride or of other halogenated olefins, in primary forms	70.0	67.4	-3.8%
39241090	Other tableware and kitchenware, of plastics	66.6	66.4	-0.3%
39206919	Other sheets and film of non-cellular polyesters, not reinforced, laminated, supported	64.4	73.5	+14.1%
39206290	Other sheets and film of non-cellular polyethylene terephthalate, not reinforced, laminated, supported	62.0	54.2	-12.5%
39072990	Other polyethers n.e.s	57.4	56.7	-1.4%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation or	58.3	58.0	-0.5%
39095000	Polyurethanes, in primary forms	56.8	58.5	+2.9%
39206929	Plates, sheets, film, foil and strip, of non-cellular polyesters, not reinforced, laminated, supported	56.3	56.3	-0.1%
39204900	Sheets and film of non-cellular polymers of vinyl chloride, containing by weight < 6% of plasticisers, not reinforced	54.4	55.4	+1.8%
96032100	Toothbrushes	48.6	61.4	+26.2%
39119090	Other polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s.	54.8	56.1	+2.3%
59031090	Other textile fabrics impregnated, coated, covered or laminated with polyvinyl chloride	50.4	52.2	+3.6%
39219096	Flexible and laminated sheets and film of plastics, reinforced, laminated, supported or similarly combined with other materials	51.9	57.2	+10.4%
39201019	Other sheets and film of non-cellular plastics	50.1	57.9	+15.6%
39235010	Caps and closures for bottles	50.1	47.0	-6.1%
39011090	Other polyethylene with a specific gravity of < 0.94	45.8	59.9	+30.8%
39172390	Rigid tubes, pipes and hoses, and fittings therefor, of polymers of vinyl chloride: Other	47.7	50.2	+5.1%
39076930	PET flake (chip)	41.6	51.8	+24.6%
39241010	Tableware and kitchenware, of plastics: Insulated ware	39.8	50.4	+26.5%

Source: Ministry of Commerce & Industry, Government of India

Exhibit 5: Reasons for major decline in plastic products exports

HS Code	Description	Apr 24- Nov 24	Apr 25 – Nov 25	Reasons for decline
		(USD Mn)		
39021000	Polypropylene, in primary forms	261.2	189.1	Exports have fallen because exporters have reduced shipments to meet domestic shortage of this raw material. India is a net importer of this raw material as domestic production is not sufficient to meet local demand. Also, decline in prices of raw materials have led to lower export realisation
39014010	Linear low density polyethylene (LLDPE)	134.7	81.1	India is a net importer of this product due to a shortfall in domestic production. Exports have declined as exporters are choosing to meet rising local demand amid the growing shortage. This surge in domestic demand is reflected in a 36% increase in imports of this product during April–November 2025.
39206220	Flexible & plain sheets & film of non-cellular PET	181.1	129.2	Exports have fallen because the recent fire at the Nashik facility of the leading manufacturer Jindal Poly Films has disrupted production. Also, Indian exporters are facing non tariff barrier in Mexico, where the government has reportedly hiked tariff and also increased import guarantee per container from about USD 60,000 to nearly USD 200,000.
39076190	Other primary form	219.5	168.2	Exporters have reduced overseas sales to meet growing demand in the domestic market. Rising domestic demand is evident from 17.6% growth in import of this product during April-November 2025. Exports have declined also because of lower shipments to UAE, where Indian exporters are facing intense competition from local players. UAE is the second largest market for this product.
59039090	Sacks and bags of polymers of ethylene	143.7	102.3	USA accounts for 35% of export revenue for exporters of this product. Shipments to USA has suffered because of hike in tariff since end August this year.
39181090	Other floor coverings in rolls with a width of >= 45 cm, of polymers of vinyl chloride	73.9	42.8	Exports have fallen as US importers withheld orders for this product amidst hike in US Tariff. USA is the prominent market accounting for 33% of export of this product.
39202020	Flexible and plain sheets and film of non-cellular polymers of ethylene	158.5	130.0	Exports have fallen because of production disruption at the Nashik facility of the leading manufacturer Jindal Poly Films. Exports have taken hit also because of tariff barrier in USA and Mexico, which are top three markets for this product. Mexico has reportedly hiked tariff on Indian exports by as much as 35% and also increased import guarantee per container from about USD 60,000 to nearly USD 200,000.

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

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