

ANALYSIS OF INDIA'S PLASTICS EXPORT

JUNE 2020



THE PLASTICS EXPORT PROMOTION COUNCIL

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

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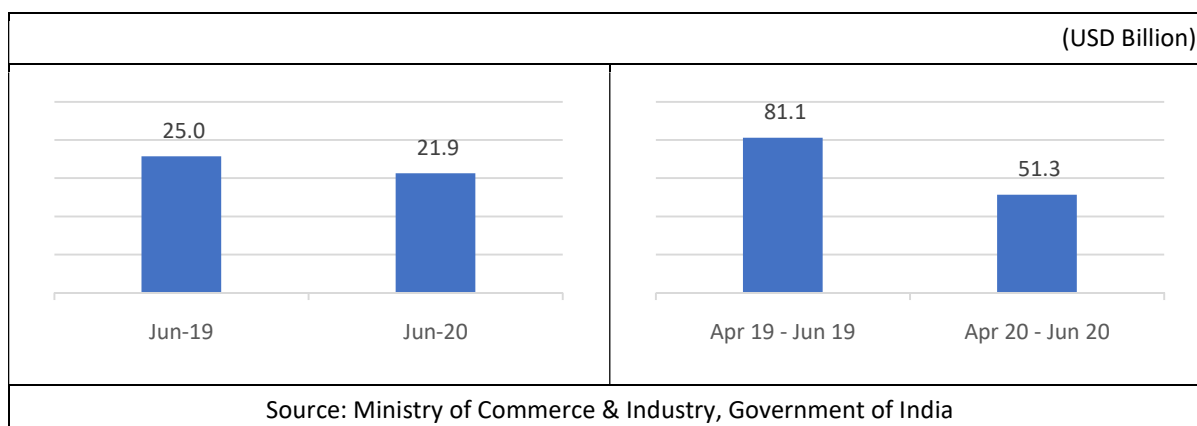
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Disclaimer: This report has been prepared on the basis of export data received from the Ministry of Commerce & Industry, Government of India on July 20, 2020

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 21.9 billion in June 2020, down 12.4% from USD 25.0 billion in June 2019. Cumulative value of merchandise exports during April 2020 – June 2020 was USD 51.3 billion as against USD 81.1 billion during the same period last year, reflecting a decline of 36.7%.

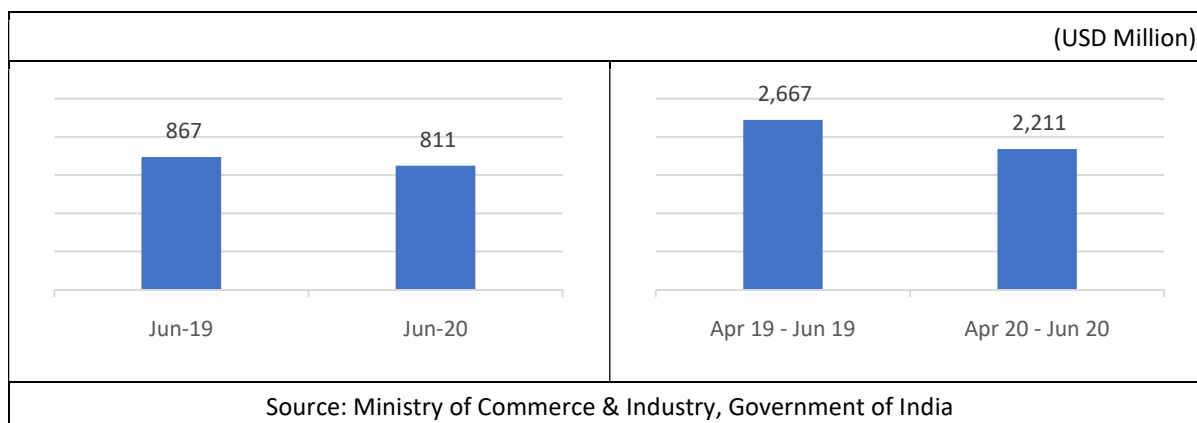
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During June 2020, India exported plastics worth USD 811 million, down 6.5% from USD 867 million in June 2019. Cumulative value of plastics export during April 2020 – June 2020 was USD 2,211 million as against USD 2,667 million during the same period last year, registering a negative growth of 17.1%.

Exhibit 2: Trend in plastics export by India



PLASTICS EXPORT, BY PANEL

In June 2020, quite a few product panels, namely, Woven sacks / FIBCs; Raw materials; Consumer & house ware; Composites / FRP; Writing instruments; and Human hair witnessed a decline due to continued impact of Covid-19 pandemic in India and the world over. Nonetheless, beating the slowdown, a double digit growth was seen in Cordage & fishnets; and Polyester films and a relatively lesser growth was witnessed in Floor coverings, leather cloth & laminates; Rigid packaging & PET preforms; and Pipes & fittings during June 2020.

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

Panel	Jun-19	Jun-20	Growth	Apr 19- Jun 19	Apr 20- Jun 20	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Consumer & House ware	48.7	38.9	-20.2%	149.3	68.9	-53.9%
Cordage & Fishnets	13.5	17.0	+25.4%	40.6	29.0	-28.5%
Composites / FRP products	28.1	22.3	-20.8%	82.6	46.0	-44.3%
Floor Coverings, Leather cloth & Laminates	32.1	33.9	+5.8%	122.1	72.3	-40.8%
Human Hair & Related Products	29.2	26.5	-9.1%	71.4	48.1	-32.7%
Miscellaneous Products	128.6	109.7	-14.7%	426.9	259.2	-39.3%
Pipes & Fittings	14.1	14.2	+0.9%	48.7	26.6	-45.3%
Polyester Films	125.6	141.6	+12.7%	387.2	384.1	-0.8%
Raw Materials	326.3	309.8	-5.1%	969.8	1,061.3	+9.4%
Rigid Packaging & PET Preforms	26.1	27.3	+4.7%	77.1	63.9	-17.2%
Woven Sacks/FIBCs	77.4	56.7	-26.8%	238.4	128.4	-46.2%
Writing Instruments	17.7	13.5	-23.9%	52.9	23.1	-56.4%
	867.3	811.3	-6.5%	2,667.0	2,210.7	-17.1%

Source: Ministry of Commerce & Industry, Government of India

Export of **Consumer & house ware** products fell by 20.2% in June 2020. Major decline was witnessed in Plastic moulded suit cases (HS code 42021220), Tableware and kitchenware of plastic (HS code 39241090), Plastics toys like dolls etc. (HS code 95030030), and Plastic tooth brushes (HS code 96032100).

Cordage & fishnets had a smart recovery and witnessed 25.4% growth in June 2020. Strong growth in export of Made up knotted fishing nets of nylon (HS code 56081110), Made up knotted fishing nets of man-made textile materials other than nylon (HS code 56081190), and Twine, cordage, ropes and cables of polyethylene or polypropylene (HS code 56074900) fuelled the powerful performance of Cordage & fishnets panel.

Export of **Composites** fell by 20.8% due to lower sales of Articles of plastics and articles of other materials of heading 3901 to 3914, nes (HS code 39269099).

In case of **Floor coverings, leather cloth & laminates**, exports in June 2020 were up 5.8% due to increased sales of Textile fabrics impregnated, coated, covered or laminated with plastics other than PVC or PU: Other (HS code 59039090).

Export of **Human hair & related products** was lower by 9.1% due to decline in shipment of Human hair, dressed, thinned, bleached or otherwise worked (HS code 67030010). China is the key destination for export of this product from India.

Export of **Pipes & fittings** witnessed a minor growth of 0.9% as higher sales of certain products like Rigid tubes, pipes and hoses, and fittings thereof, of PVC: Other (HS code 39172390) and Flexible tubes, pipes and hoses, and fittings thereof, of plastics, reinforced or otherwise combined with other materials: Other (HS code 39173990) was offset by lower sales of Rigid tubes, pipes and hoses, and fittings thereof, of polymers of ethylene: Other (HS code 39172190), Tubes of polyethylene (HS code 39172110), and Plastic fittings for tubes, pipes and hoses (HS code 39174000).

Polyester films had another stellar month with exports witnessing a rise of 12.7% in June 2020 on the back of strong growth in sales of BOPP films (HS code 39202020).

Plastics raw materials which had a good start to the year 2020-21 witnessed de growth in June 2020 due to lower exports of Linear low density polyethylene (HS code 39011010, 39014010), Polyethylene with a specific gravity of < 0.94: Other (HS code 39011090), and Polyethylene Terephthalate having a viscosity number of 78 ml/g or higher (HS code 39076100, 39076110, 39076190).

Rigid packaging & pet performs reported a positive growth of 4.7% due to higher export of Carboys, bottles, flasks and similar articles for the conveyance or packaging of goods, of plastics: Other (HS code 39233090), Caps and closures of plastics (HS code 39235010), and Box case crate of plastics nes (HS code 39231090).

Export of **Woven sacks and fibcs** fell by 26.8% during June 2020 due to a huge decline in sales of FIBC. Indian exporters of FIBC are losing out their market share particularly in the European countries. Indian FIBC exporters have also been denied MEIS / RoDTEP since August 2019 which continues to hurt their export competitiveness.

Export of **Writing instruments** dropped by 23.9%, mainly on account of a decline in sales of Ball-point pens (HS code 96081019).

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

HS Code	Description	Apr 19- Jun 19	Apr 20- Jun 20	Growth
		(USD Mn)	(USD Mn)	(%)
39076100	Polyethylene terephthalate): having a viscosity number of 78 ml/g or higher	217.74	-	NM
63053200	Flexible intermediate bulk containers	168.59	105.34	-37.5%
39021000	Polypropylene, in primary forms	110.26	264.91	+140.3%
39012000	Polyethylene with a specific gravity of >= 0.94	115.30	109.92	-4.7%
39232990	Sacks and bags, incl. cones, of plastics (excl. those of polymers of ethylene): Other	88.88	63.73	-28.3%
39011010	Linear low density polyethylene (LLDPE)	107.58	45.02	-58.2%
39269099	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	81.56	45.20	-44.6%
67030010	Human hair, dressed, thinned, bleached or otherwise worked	67.13	46.61	-30.6%
90011000	Optical fibres, optical fibre bundles and cables (excl. made-up of individually sheathed fibres of heading 8544)	68.45	42.78	-37.5%
48239019	Decorative laminates	49.12	31.88	-35.1%
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	54.00	64.97	+20.3%
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	31.03	16.08	-48.2%
39269080	Polypropylene articles , not elsewhere	41.98	32.44	-22.7%
39232100	Sacks and bags, incl. cones, of polymers of ethylene	39.29	27.94	-28.9%
39076990	Other, polyethylene terephthalate	57.64	35.23	-38.9%
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	35.46	29.58	-16.6%
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	44.93	24.63	-45.2%
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	32.79	63.30	+93.0%

HS Code	Description	Apr 19- Jun 19	Apr 20- Jun 20	Growth
		(USD Mn)	(USD Mn)	(%)
39011090	Polyethylene with a specific gravity of < 0.94: Other	36.13	12.94	-64.2%
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	27.46	3.52	-87.2%
90015000	Spectacle lenses of materials other than glass	35.50	17.75	-50.0%
96081019	Ball-point pens	31.17	13.92	-55.3%
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	30.06	26.72	-11.1%
39046100	Polytetrafluoroethylene, in primary forms	32.61	24.64	-24.4%
90183930	Cannulae	23.39	20.03	-14.4%
39241090	Tableware and kitchenware, of plastics: Other	23.98	10.58	-55.9%
96032100	Tooth brushes, incl. dental-plate brushes	21.95	12.67	-42.3%
39069090	Acrylic polymers, in primary forms (excl. polymethyl methacrylate): Other	20.23	16.44	-18.7%
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	20.78	28.41	+36.7%
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	16.86	10.04	-40.5%
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	18.16	14.09	-22.4%
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 poly"vinyl chloride"): Other	19.06	8.64	-54.7%
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	19.72	17.96	-8.9%

HS Code	Description	Apr 19- Jun 19	Apr 20- Jun 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	12.92	19.62	+51.9%
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)	24.52	13.17	-46.3%
39140020	Ion-exchangers based on polymers of heading 3901 to 3913, in primary forms: Ion exchangers of polymerisation	18.21	14.95	-17.9%
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	17.59	21.07	+19.8%
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	15.03	24.62	+63.8%
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	20.60	14.75	-28.4%
39072090	Polyethers, in primary forms (excl. polyacetals): Other	6.68	19.78	+196.1%
39241010	Insulated ware of plastics	13.95	5.26	-62.3%
39073010	Epoxy resins	18.43	6.94	-62.3%
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	35.91	3.54	-90.1%
39095000	Polyurethanes, in primary forms	13.08	14.05	+7.4%
39100090	Silicones in primary forms: Other	16.36	9.46	-42.2%
39235010	Stoppers, lids, caps and other closures, of plastics: Caps and closures for bottles	11.13	9.34	-16.1%

HS Code	Description	Apr 19- Jun 19	Apr 20- Jun 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	13.49	12.85	-4.7%
39119090	Polysulphides, polysulphones and other polymers and prepolymers produced by chemical synthesis, n.e.s., in primary forms: Other	13.62	11.64	-14.5%
39031990	Polystyrene, in primary forms (excl. expansible): Other	16.56	11.20	-32.4%
39269069	Articles of plastics and articles of other materials of heading 3901 to 3914, n.e.s: Other	11.97	4.24	-64.6%

Source: Ministry of Commerce & Industry, Government of India

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