

ANALYSIS OF INDIA'S PLASTICS EXPORT
SEPTEMBER 2019



THE PLASTICS EXPORT PROMOTION COUNCIL

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

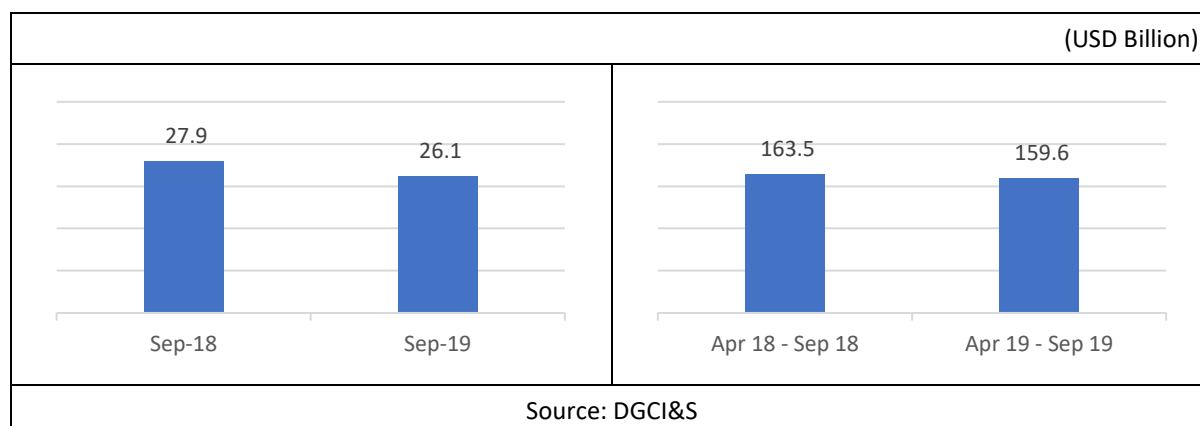
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Disclaimer: This report has been prepared on the basis of principal commodity level data sourced from the Directorate General of Commercial Intelligence and Statistics (DGCI&S) on October 30, 2019

TREND IN OVERALL EXPORTS

India reported merchandise exports of USD 26.1 billion in September 2019, down 6.4% from USD 27.9 billion in September 2018. Cumulative value of merchandise exports during April 2019 – September 2019 was USD 159.6 billion as against USD 163.5 billion during the same period last year, reflecting a decline of 2.4%.

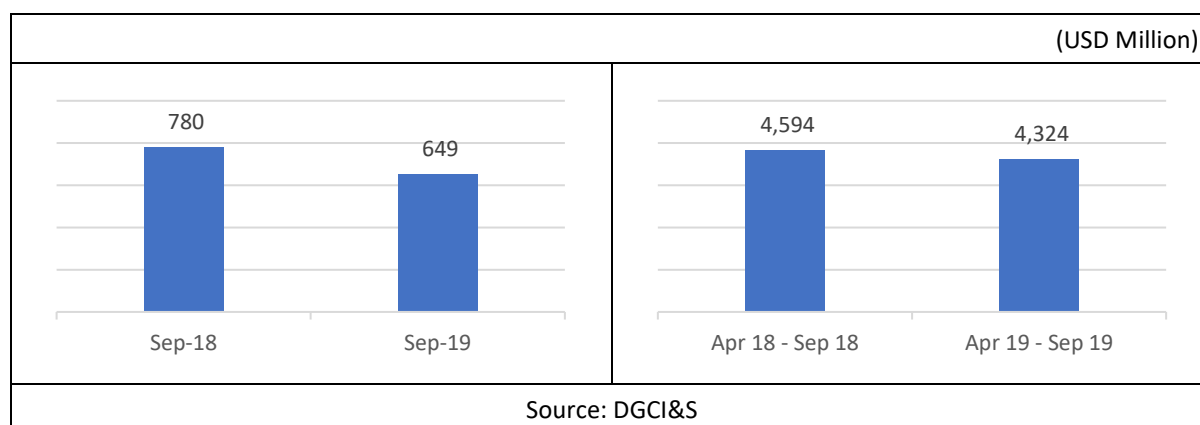
Exhibit 1: Trend in overall merchandise exports from India



TREND IN PLASTICS EXPORT

During September 2019, India exported plastics worth USD 649 million, down 16.8% from USD 780 million in September 2018. Cumulative value of plastics export during April 2019 – September 2019 was USD 4,324 million as against USD 4,594 million during the same period last year, registering a negative growth of 5.9%.

Exhibit 2: Trend in plastics export by India



- Plastics formed 2.71% of India's overall merchandise exports in April 2019 – September 2019
- India exported plastics to 209 countries in April 2019 – September 2019
- United States, China and United Arab Emirates were the top three buyers of plastics from India in April 2019 – September 2019

PLASTICS EXPORT, BY PANEL

In September 2019, plastic raw materials witnessed year-on-year decline of 33.0%; followed by optical items (-19.2%); stationery/office/school supply (-9.7%); and moulded & extruded goods (-8.2%). Product categories that reported positive growth include human hair products (+29.5%); other plastic items (+12.1%); plastic sheet, film, plates etc (+3.5%); and packaging materials (+2.7%).

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

Panel	Sep-18	Sep-19	Growth	Apr 18- Sep 18	Apr 19- Sep 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
Plastic raw materials	387.32	259.33	-33.0%	2,235.47	1,804.27	-19.3%
Plastic sheet, film, plates etc	116.89	120.93	3.5%	733.06	755.41	3.0%
Moulded & extruded goods	100.46	92.22	-8.2%	551.88	634.63	15.0%
Packaging materials	72.74	74.70	2.7%	418.85	426.30	1.8%
Optical items (incl. lens etc)	39.67	32.06	-19.2%	239.22	231.72	-3.1%
Other plastic items	28.60	32.07	12.1%	183.43	221.78	20.9%
Human hair, products thereof	16.74	21.67	29.5%	107.06	131.73	23.0%
Stationery/Office/School Supply	17.93	16.19	-9.7%	125.29	117.72	-6.0%
	780.35	649.17	-16.8%	4,594.26	4,323.55	-5.9%

Note: Plastics are segregated under eight panels by DGCI&S

Source: DGCI&S

Some of the products which witnessed a huge decline in exports from India were:

- Within plastics raw materials, exports of Linear low-density polyethylene (HS code 39011010) were down 64.5% yoy to USD 20.4 million in September 2019 due to lower sales to China, Indonesia and Viet Nam. Likewise, exports of Polyethylene terephthalate having a viscosity number of 78 ml/g or higher (HS code 39076100) fell 35.6% yoy to USD 55.5 million in September 2019 due to lower sales to Uruguay and Algeria. India's exports of Polypropylene (HS code 39021000) witnessed a negative growth of 36.9% yoy to USD 36.7 million in September 2019 due to lower sales to Viet Nam, Italy and Nepal. Even exports of Polyethylene having a specific gravity of 0.94 or more (HS code 39012000) was down 37.6% yoy to USD 29.8 million in September 2019 due to lower sales to China.
- Among value-added plastics products, export of optical items (incl. lens etc) from India was lower due to a decline in export of optical fibers, optical fibre bundles and cables (HS code 90011000), down 32.4% yoy to USD 16.8 million in September 2019 to countries like France and Russian Federation. In addition, export of moulded & extruded goods was impacted as most of the major destinations, barring the United States, bought lesser of these products from India. India's exports of stationery/office/school supplies was hurt by lower sales to Nepal, Ukraine, Saudi Arabia, and France.

PLASTICS EXPORT, BY REGION

India's plastics export in September 2019 was negative across all territories including, ASEAN + 2 (-34.0% year-on-year); Latin America & Caribbean (-30.1%); North-East Asia (-22.5%); Commonwealth of Independent States (-19.8%); European Union (-19.6%); Africa (-13.3%); South Asia (-11.4%); Middle East (-7.5%); and North America (-6.0%).

Exhibit 4: Region-wise trend in plastics export by India

Region	Sep-18	Sep-19	Growth	Apr 18- Sep 18	Apr 19- Sep 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
European Union (EU)	152.36	122.53	-19.6%	918.40	847.68	-7.7%
North America	110.36	103.75	-6.0%	618.56	687.42	11.1%
Middle East	109.63	101.44	-7.5%	711.29	679.80	-4.4%
North-East Asia	128.81	99.83	-22.5%	658.33	651.40	-1.1%
Africa	88.53	76.79	-13.3%	569.19	525.03	-7.8%
South Asia	66.26	58.72	-11.4%	426.97	385.23	-9.8%
ASEAN + 2	71.95	47.48	-34.0%	368.62	298.23	-19.1%
Latin America & Caribbean (LAC)	38.69	27.03	-30.1%	254.05	179.20	-29.5%
CIS	10.71	8.59	-19.8%	46.23	54.20	17.2%
Others	3.05	3.01	-1.4%	22.61	15.37	-32.0%
	780.35	649.17	-16.8%	4,594.26	4,323.55	-5.9%

Source: DGCI&S

It is important to mention that India's plastics exports have been negatively affected due to strained trade relations between India and Pakistan since the start of the year. India's plastics exports to Pakistan have fallen down 91.3% yoy to USD 1.0 million in September 2019. During 2018-19, India's plastics exports of Pakistan were valued at USD 165.46 million and chiefly comprised of Plastics raw materials and Woven sacks/FIBCs.

PLASTICS EXPORT, BY DESTINATION COUNTRY

During September 2019, five out of the top 25 destination countries recorded year-on-year growth in plastics export from India. Exports to Saudi Arabia witnessed a high growth rate of 24.5% during the period.

On a cumulative basis, during April 2019 – September 2019, seven out of the top 25 destination countries recorded year-on-year growth in plastics export from India. Exports to South Africa, Saudi Arabia and Canada, witnessed high growth rates ranging between 18-40%, during the above period.

Exhibit 5: Top 25 destinations of plastics exported by India

Country	Sep-18	Sep-19	Growth	Apr 18- Sep 18	Apr 19- Sep 19	Growth
	(USD Mn)	(USD Mn)	(%)	(USD Mn)	(USD Mn)	(%)
China	109.88	83.87	-23.7%	537.78	532.69	-0.9%
United States	88.36	86.26	-2.4%	500.15	569.07	13.8%
United Arab Emirates	36.24	34.09	-5.9%	223.14	234.96	5.3%
Italy	26.80	20.01	-25.3%	187.52	144.77	-22.8%
Germany	27.78	25.47	-8.3%	162.54	153.47	-5.6%
Bangladesh	22.99	22.70	-1.3%	169.49	139.66	-17.6%
Turkey	16.40	18.64	13.7%	146.92	109.54	-25.4%
United Kingdom	23.04	19.55	-15.1%	128.28	134.38	4.8%
Nepal	21.05	22.03	4.6%	116.98	131.00	12.0%
Vietnam	22.85	8.39	-63.3%	105.45	68.94	-34.6%
France	16.21	9.96	-38.5%	92.03	89.09	-3.2%
Indonesia	18.38	9.71	-47.2%	87.36	50.89	-41.7%
Egypt	14.14	8.18	-42.1%	83.22	51.54	-38.1%
Belgium	10.48	7.60	-27.5%	66.80	58.36	-12.6%
Japan	10.79	8.84	-18.0%	68.11	55.74	-18.2%
Nigeria	11.98	10.28	-14.2%	82.79	56.44	-31.8%
Pakistan	8.59	1.01	-88.2%	61.58	41.08	-33.3%
South Africa	9.95	10.40	4.6%	56.43	77.48	37.3%
Israel	14.86	10.36	-30.3%	63.98	55.80	-12.8%
Mexico	12.39	7.90	-36.2%	66.50	56.83	-14.5%
Kenya	7.42	9.15	23.4%	65.32	64.83	-0.7%
Spain	11.92	7.86	-34.1%	62.23	56.10	-9.8%
Sri Lanka	11.12	8.72	-21.6%	58.70	49.51	-15.7%
Canada	9.61	9.59	-0.2%	51.91	61.52	18.5%
Saudi Arabia	8.02	9.98	24.5%	46.17	60.04	30.0%

Note: Top 25 destinations based on 2018-19 plastic exports by India

Source: DGCI&S

India exported plastics to 186 countries in September 2019 as compared to 184 countries in September 2018.

Exhibit 6: Panels with details of % growth seen in top 10 export destinations

Panel	Country	Apr 18- Sep 18	Apr 19- Sep 19	Growth
		(USD Mn)	(USD Mn)	(%)
Plastic raw materials	China	439.75	402.43	-8.5%
	Italy	133.28	85.35	-36.0%
	Turkey	125.44	94.40	-24.7%
	Bangladesh	121.46	91.96	-24.3%
	United Arab Emirates	106.40	86.41	-18.8%
	United States	87.56	71.49	-18.4%
	Vietnam	93.51	57.35	-38.7%
	Nepal	71.37	82.11	15.0%
	Indonesia	70.04	32.28	-53.9%
	Pakistan	56.77	37.84	-33.4%
Plastic sheet, film, plates etc	United States	114.78	136.77	19.2%
	United Arab Emirates	30.06	33.11	10.1%
	Germany	37.42	36.27	-3.1%
	South Africa	33.63	35.35	5.1%
	Nigeria	36.66	18.04	-50.8%
	Italy	25.58	24.62	-3.7%
	United Kingdom	23.67	28.16	19.0%
	Bangladesh	22.29	17.05	-23.5%
	Mexico	22.82	19.93	-12.7%
	Spain	18.44	19.69	6.8%
Moulded & extruded goods	United States	124.31	181.42	45.9%
	United Arab Emirates	33.78	51.56	52.6%
	United Kingdom	27.97	29.66	6.0%
	Germany	28.20	24.68	-12.5%
	Canada	23.28	31.01	33.2%
	Sri Lanka	12.52	6.48	-48.3%
	Spain	12.14	10.12	-16.7%
	Nigeria	9.72	10.05	3.3%
	Saudi Arabia	7.61	11.59	52.3%
	Brazil	9.02	12.46	38.1%
Packaging materials	United States	77.76	90.87	16.9%
	United Kingdom	35.74	32.59	-8.8%
	United Arab Emirates	21.50	24.95	16.0%
	Netherland	16.05	14.60	-9.1%
	Germany	12.92	10.40	-19.5%
	Belgium	11.76	4.78	-59.3%
	France	10.61	9.20	-13.3%
	Spain	9.02	9.07	0.6%
	Djibouti	8.41	8.19	-2.5%
	Nepal	8.13	7.19	-11.6%

Note: Top 10 destinations based on India's 2018-19 exports under the eight plastic product panels

Source: DGCI&S

Panel	Country	Apr 18- Sep 18	Apr 19- Sep 19	Growth
		(USD Mn)	(USD Mn)	(%)
Optical items (incl. lens etc)	France	57.41	61.21	6.6%
	Germany	25.86	24.29	-6.1%
	United Kingdom	20.35	20.94	2.9%
	United States	15.09	5.22	-65.4%
	United Arab Emirates	6.86	10.16	48.1%
	Netherland	10.56	11.94	13.1%
	Poland	9.61	10.23	6.4%
	Italy	4.85	11.67	140.5%
	Russia	4.83	5.77	19.5%
	Israel	3.84	4.67	21.6%
Other plastic items	United States	42.27	45.44	7.5%
	Belgium	18.29	12.77	-30.2%
	United Arab Emirates	15.57	21.02	35.0%
	South Africa	4.67	18.62	298.7%
	United Kingdom	4.74	8.72	84.0%
	Italy	6.25	7.87	25.9%
	Germany	5.93	8.24	39.0%
	Poland	3.66	4.43	21.2%
	Nepal	4.68	4.87	4.0%
	Saudi Arabia	4.15	4.81	15.7%
Human hair, products thereof	China	58.83	89.39	51.9%
	Myanmar	10.79	5.07	-53.0%
	United States	7.81	7.81	0.0%
	Tunisia	5.48	6.81	24.3%
	Hong Kong	4.28	6.16	43.7%
	Bangladesh	3.35	2.74	-18.4%
	United Arab Emirates	2.83	1.82	-35.6%
	Vietnam	1.41	2.14	51.8%
	Indonesia	1.90	1.10	-42.1%
Italy	1.96	1.32	-32.8%	
Stationery/Office/School Supply	United States	30.58	30.05	-1.7%
	United Arab Emirates	6.14	5.94	-3.3%
	United Kingdom	7.52	6.13	-18.5%
	Thailand	5.89	5.13	-12.8%
	Algeria	2.73	3.86	41.3%
	Bangladesh	2.80	3.39	20.8%
	Germany	2.94	2.68	-8.7%
	Mexico	2.59	1.77	-31.6%
	Latvia	2.73	1.44	-47.2%
	Nepal	2.88	2.56	-11.2%

Note: Top 10 destinations based on India's 2018-19 exports under the eight plastic product panels

Source: DGCI&S

ANNEXURE-I

Trend in overall exports by India

Month	2018-19	2019-20	Growth
	(USD Bn)	(USD Bn)	(%)
April	25.95	26.07	0.5%
May	28.78	30.01	4.3%
June	27.15	25.01	-7.9%
July	25.89	26.32	1.7%
August	27.87	26.13	-6.3%
September	27.90	26.11	-6.4%
	163.54	159.65	-2.4%

Source: DGCI&S

ANNEXURE-II

Trend in plastics export by India

Month	2018-19	2019-20	Growth
	(USD Mn)	(USD Mn)	(%)
April	742.66	702.53	-5.4%
May	741.65	830.55	12.0%
June	769.08	732.57	-4.7%
July	730.46	709.33	-2.9%
August	830.05	699.40	-15.7%
September	780.35	649.17	-16.8%
	4,594.26	4,323.55	-5.9%

Source: DGCI&S

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