

Report of the Sub-Group on Export Growth

Under the Joint Working Group on Petrochemicals

Sub Group Lead: **Arvind Mehta, Governing Council Chairman, AIPMA**

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1. Executive Summary

The Department of Chemicals and Petrochemicals (DCPC) constituted a Sub-Group on Export Growth comprising representatives of AIPMA, CPMA, OPPI, PLEXCONCIL, CHEMEXCIL and Nayara Group, under the leadership of Shri Arvind Mehta, Chairman, Governing Council, AIPMA. The Subgroup was under the Joint Working Group on Petrochemicals.

The Sub-Group was mandated to recommend product-specific interventions to promote the growth of the domestic petrochemicals industry, taking into account the competitiveness, import-substitution potential and export potential of downstream industries. The recommendations are required to be specific, actionable and categorised into short-, medium- and long-term measures.

The report draws upon inputs mainly from AIPMA, PLEXCONCIL and OPPI, including product-level export analysis, international market opportunities and recommendations for strengthening the competitiveness of India's plastics processing industry.

Current Status of Exports: India has a large and diversified plastics processing industry, however, its share in international markets for value-added plastics finished products remains low. India's exports of plastics finished products in 2025–26 were approximately US\$8.63 billion, including chapters beyond Chapter 39. India's export performance has considerable scope for improvement. **More than 90% of plastics processors are MSMEs**, making their competitiveness, technological capabilities and access to international markets central to the country's export-growth ambitions.

Export Opportunities: AIPMA's analysis of 15 major importing countries across seven selected HSN chapters indicates a combined import market of approximately **US\$571.6 billion** in 2025–26. India's exports to these markets were approximately US\$5.89 billion, representing a share of only **1.03%**. Chapter 39 alone accounts for a market of approximately US\$149.9 billion across these countries.

PLEXCONCIL has identified 29 products contributing approximately 78% of India's plastics exports. These products have been classified according to export performance into five groups: products for scaling up, products requiring upgrading, emerging growth opportunities, products requiring stabilisation and diversification, and products requiring revival. This provides a basis for differentiated product-specific strategies. PLEXCONCIL has also identified 25 high-potential product–market combinations across six FTA partner markets—the United Kingdom, Australia, UAE, Oman, Switzerland and Norway. These markets represent approximately US\$7.2 billion in imports for the identified combinations, against Indian exports of about US\$158 million. Raising India's share to 5% is estimated to generate approximately US\$210 million in additional exports.

The OPPI inputs identify further opportunities in engineering and technical plastics, medical plastics, speciality films, automotive components, packaging and circular products.

The report recommends a focused **Product–Market Opportunity Programme** based on market size, India's existing competitiveness, export growth potential and achievable market penetration. It also calls for diversification beyond the major existing markets, while continuing to expand exports wherever Indian products are competitive.

Constraints to Export Growth: Several structural and operational constraints have been listed by OPPI affecting the international competitiveness of Indian plastics processors. These include:

- High energy and logistics costs.
- Inadequate economies of scale and concentration in commodity and semi-finished products.
- Gaps in modern machinery, automation, tooling, mould-making, product design and development.
- High costs of international testing, certification and regulatory compliance.
- Limited market intelligence, overseas buyer contacts, distribution networks and global branding.
- Inadequate utilisation of FTAs and difficulties in addressing non-tariff barriers.
- Limited access to suitable export finance and long-term capital.

- Insufficient integration with global value chains and sustainability requirements.

These constraints are particularly significant for **MSMEs, which often lack the resources to independently undertake overseas market development, certification and technology modernisation.**

Facilitating Factors and Proposed Interventions: The report proposes a coordinated set of interventions to address these constraints.

1. Access to overseas buyers: Scale up **Plastiworld into a major India Plastics Export Fair** and global sourcing platform, **modelled partly on the Canton Fair**, to connect Indian manufacturers with international buyers.

2. Certification and payment security: Improve access to international testing and certification, establish practical guidance for exporters and strengthen awareness of ECGC programmes and competitive pre-shipment and post-shipment credit facilities.

3. Competitive raw-material supply: Develop a mechanism to facilitate domestic polymer supplies for export production at prices that address the applicable import-duty disadvantage. The report proposes examining a 7.5% price adjustment for eligible supplies from non-SEZ plants, subject to an appropriate policy and implementation mechanism. Present export raw mater. Raw material Requirements for Exports: Total Exports of US\$ 8.63 Bn or Rs 76186 Crs comes to app Rs 58605 Crs of raw material or 5860 KTs. Share of raw material for exports in total Consumption of India in 2025-26 estimated at 24182 KTs was app 5860 KTs which comes to 24.2% of consumption. Raw material requirement for exports will go up to **10.4 to 15.1 million Mts by 35-36** and **21.1 to 47.7 million MTs by 47-48**. At different growth rates in exports of 6%, 8% and 10% pa

4. Technology upgradation and machinery procurement: Establish a Plastics Export Technology Upgradation Programme or Fund, with a proposed outlay of ₹10,000 crore, to support automation, robotics, energy efficiency, digital manufacturing, modern machinery and mould-making. The report also proposes a National Plastics Machinery Procurement and Technology Council/Platform to aggregate demand, secure competitive offers and improve access to appropriate technology. India imported Plastics processing Machinery worth US\$ 1.92 Bn and Mould worth US\$ 810 Mn during 2025

5. Import substitution: Identify value-added plastic products with significant and rising imports and promote domestic manufacturing through targeted vendor development, technology partnerships and joint ventures where appropriate. Import Substitution Potential, as per DGCIS data, plastics product imports of 7 chapter in 2025 were Rs 71440 Crs. Raw material potential requirement for import substitution comes to 5459 KTs

6. Export information and buyer connectivity: Establish an **India Plastics Export Connect – DIY Export Helpline and Global Buyer Connect Portal**, sponsored by DCPC with industry participation where AIPMA is willing to take lead. The portal would progressively provide information on tariffs, FTAs, rules of origin, certification, standards, non-tariff barriers, export schemes and target markets avoiding duplication with websites of FIEO and PLEXCONCIL. It would also enable overseas buyers to identify Indian suppliers and allow exporters to voluntarily share references based on successful business relationships.

7. Employment and sectoral expansion: Support the modernisation and expansion of plastics processing capacity to meet growing domestic demand and improve export competitiveness. The report highlights the sector's substantial employment potential, **particularly through MSME growth**. Plastics processing sector has the potential to increase the present employment from 4.5 million to 10 million by 2035 and 20 million by 2047.

Consolidated Recommendations and Action Plan: The report recommends to prioritise the following actions:

1. Develop a list of 15–20 priority product–market combinations with measurable export targets.

2. Examine suitable incentives for selected high-value-added plastics exports and review embedded taxes and RoDTEP support for priority products.
3. PLI for Value added Plastics Product Exports
4. Develop a mechanism for competitive domestic polymer supplies for export production.
5. Launch a technology-upgradation programme and establish a machinery procurement and technology platform.
6. Improve access to international certification, testing, export finance and FTA-related market information.
7. Scale up Plastiworld into a major plastics export and global sourcing fair.
8. Implement targeted import-substitution and domestic vendor-development programmes.
9. Develop the India Plastics Export Connect portal in phases, beginning with essential export information and progressively expanding into market intelligence and global buyer–exporter matching.

Conclusion: India's plastics export challenge is not a shortage of global demand, but the need to improve competitiveness, identify the right product–market opportunities and equip Indian processors to serve international customers consistently. A coordinated approach combining competitive raw-material access, technology upgradation, focused market development, certification support, import substitution and stronger buyer connectivity can strengthen India's position in global plastics trade.

Government to address policy and structural disadvantages, while industry must invest in productivity, quality, innovation, design, standards compliance and customer development. The proposed interventions can help expand exports, strengthen domestic manufacturing, conserve foreign exchange and create employment across India's plastics processing sector.

2. Preamble.

India is looking to increase the export of Plastics Finished products. For this DCPC has constituted a subgroup of experts from the industry. The subgroup members are

1. **AIPMA**
2. CPMA- Chemicals and petrochemicals manufacturers association
3. **OPPI- Organisation of Processors of India**
4. **PLEXCONCIL**
5. CHEMEXCIL
6. Nayara Group

The subgroup is being led by **Sh Arvind Mehta, Governing Council Chairman, AIPMA.**

Subgroup on Export Growth has following terms of reference

1. To Recommend Product specific intervention to support the growth of the domestic petrochemicals industry, taking into account the competitiveness, import substitutions potential and export potential of the downstream industry.
2. The recommendations should be specific and actionable and may be categorized into short term, medium term and long-term measures

Report of the Sub-Group on Export Growth has following structure

A Current Status of Exports

B Export opportunities

C Constraints

D Facilitating factors

E Recommendations

Annexure

1. Data Table

2. Subgroup members inputs

The inputs for this report of the Sub-Group are mainly from **AIPMA, PLEXCONCIL study, OPPI.**

A. Current Status of Exports of Plastics finished products

A1. Current status of Exports: India has a large and diversified plastics processing industry, but its penetration in international markets for value-added plastics and plastics-related products remains very low.

India exported plastics finished products in 2025-26 worth US\$ 4.7 Bn (as per DCPC) and imported plastics finished products worth US\$ 6.26 Bn. **Plexconcil website indicates exports of US\$ 8.63 Bn including chapters other than 39** India has a very small share in export of finished products to the world. The share of India in world import is just about 1 %.

B Export opportunities

B1. Analysis of top 15 importing Countries: AIPMA has conducted a study of imports from the world by top 15 importing countries of the world for 7 HSN chapters. The analysis of the **15 major importing countries** and the seven selected chapters provides the clear indication of the opportunity.

Chapter 39 analysis indicates that imports by top 15 countries was US\$ 149 Bn and India export to these top 15 countries was US\$ 1.5 Bn. India's share was just 1%, (Data Table 1)

The scenario for 7 different chapters is no different. In 2025–26, these 15 countries imported approximately **US\$571.6 billion** of products covered by the seven selected chapters. India's exports of these products to the same countries were only **US\$5.89 billion**, representing an overall market share of approximately **1.03%**. (Data Table 2)

This is the fundamental opportunity for the Indian plastics industry to increase exports.

Seven-Chapter opportunity			
Chapter	Imports by 15 countries US\$ Bn	India's exports to 15 countries US\$ Bn	India's share
39	149.88	1.50	1.00%
56	10.64	0.27	2.56%
63	6.28	1.14	18.10%
90	168.36	1.01	0.60%
94	116.04	1.27	1.10%
95	98.33	0.51	0.52%
96	22.05	0.20	0.88%
Total	571.59	5.89	1.03%

The Chapter 63 share above such as woven sacks/FIBC can show substantially higher Indian market penetration but overall size of total imports by 15 countries is only 1 %.

PLEXCONCIL's product-level analysis identifies 25 product/market opportunities in the UK, Australia, UAE, Oman, Switzerland and Norway.

These markets represent approximately **US\$7.2 billion** of imports for the identified product-country combinations, against only about **US\$158 million of Indian exports**. Raising India's share to 5% is estimated to create roughly **US\$210 million additional exports**.

As per Plexconcil

India has competitive strength in 29 products (6-digit HS Code) that contribute 78% to annual plastic exports
Leading products in this category are: Toys HS 950300, toothbrushes HS 960321, FIBC HS 630532, HS 382319, sacks & bags HS 392329, HS 320619 (+9.5%), laminates HS 482390
In some of these products, India needs to scale up to sustain export growth, in some products where export is declining or flat, India needs to explore alternative markets , upgrade quality standards, comply with sustainability regulations and regain lost markets
25 products are identified with maximum export potential in six FTA markets ; India has 2.2% market share in these markets; Raising this share to at least 5% in each pair would add about USD 210 million in exports.
Import substitution for 18 products that account for 48% of value-added plastic imports; is another opportunity
India may aim to reduce import share of these products from 48% to 35% in next six years to save foreign exchange , promote domestic manufacturing, create more jobs and improve Self Reliance

The OPPI analysis broadens the opportunity to Mauritius, UAE, EFTA, UK, Oman, EU, New Zealand and Austria within the EU framework. It particularly identifies engineering plastics, medical plastics, speciality films, automotive components, technical plastics, packaging and circular products as attractive areas.

OPPI also recommends Product-specific overseas market development. Instead of generic participation in exhibitions, market-development support could be allocated according to product:

Product	Priority overseas markets to develop
FIBC/woven sacks	EU, UK, USA, Australia, Middle East, Africa
Ropes/nets	EU, Japan, Korea, ASEAN, Middle East
Non-wovens	EU, USA, Japan, ASEAN
Plastic films	EU, USA, Middle East, Africa, ASEAN
Pipes/fittings	Africa, Middle East, ASEAN, Latin America
Furniture	Middle East, Africa, EU, USA
Toys	EU, USA, Middle East, ASEAN
Brushes	Africa, Middle East, EU, Latin America
Technical plastics	EU, USA, Japan, Korea, ASEAN

The strategic implication. We should not simply attempt to increase exports of products in which it is already successful but the priority should be to identify: Large product markets having low Indian penetration and realistic ability to become competitive.

For example, India has a strong position in woven sacks/FIBC, but the overall Chapter 63 market is relatively small compared with Chapters 39, 90, 94 and 95. Therefore, FIBC should be treated as a **product where India should defend and scale its leadership**, while much larger opportunities should simultaneously be developed in engineering/technical products, medical products, furniture, toys, packaging and other value-added categories.

India's export concentration must also be addressed. Another interesting finding is geographical concentration. Of India's US\$5.88 billion exports to the 15 countries:

• USA accounts for	US\$2.17 billion or	36.9%
• Germany accounts for	US\$ 651 million or	11.1%
• UK accounts for	US\$ 638 million or	10.8%
• France	US\$451 million or	7.7%
• Netherlands	US\$416 million or	7.1%

Thus, the USA alone accounts for almost **37%** of exports of India to the selected countries, while the USA, Germany and UK together account for approximately **59%**. **This dependence represents a vast untapped potential in other parts of the world.**

We should pursue a **"Growth + Diversification" strategy**:

- continue expanding the USA where India is competitive;
- substantially increase penetration in Europe;
- exploit UK FTA opportunities;
- develop Australia and Japan;
- expand ASEAN;
- strengthen UAE/GCC;
- develop Africa and Latin America selectively.

The objective should not be to reduce exports to the USA. It should be to **increase exports to other markets faster**, thereby reducing concentration over time.

B2: Chapter 39 imports Analysis by 15 countries: Data Table 1 provides a much more useful basis for selecting products. For Chapter 39 alone, the top HSN products include:

1. 39269097 – other articles of plastics
2. 39232100 – sacks and bags of polymers of ethylene
3. 39231090 – boxes, cases, crates and similar packaging articles
4. 39181010 – vinyl floor coverings
5. 39239000 – other plastic packaging articles
6. 39199080 – self-adhesive films/sheets
7. 39174000 – plastic pipe fittings

The table below indicates **a Billion Dollar** or more market marked in **Green** and **US\$ 500 million to US\$ 1 Bn** Markets marked in **Red**

Chapter 39 total imports by top 15 countries is US\$ 149Bn in which share of India is US\$ 1.5 Bn

Chapter 39 Total Imports of Top 25 HSN codes by Top 15 countries in 2025																					
		Green Cells Imports of over US\$ 1 Bn										Red Cells Imports of US\$ 500 Mn to US\$ 1 Bn									
			In US \$ Million																		
	HSN Code	HSN description	Belgi um	Brazi l	Can da	Chile	China	Franc e	Germ any	Italy	Japa n	Netherl and	Polan d	Spain	Turk ey	UK	USA	Total	%age Share	Cum %age	
1	39269097	ARTICLES OF PLASTICS AND ART	1481					3496	7614	1920		2628	2309	1600	975	2391		24414	16.29%	16.29%	
2	39232100	SACKS AND BAGS (INCLUDING C	250			102	96	542	944	235	1076	556	229	210		720	2682	7641	5.10%	21.39%	
3	39231090	BOXES, CASES, CRATES AND SIM	276			26		506	871	481		724	310	777	202	446	1465	6086	4.06%	25.45%	
4	39181010	FLOOR COVERINGS OF VINYL TIL	160						347			249				270	4349	5375	3.59%	29.03%	
5	39239000	ARTICLES FOR THE CONVEYANC	300				313	344	795	252	216	341	232	221	104	340	1755	5213	3.48%	32.51%	
6	39199080	PLATES, SHEETS, STRIPS, RIBB	441					615	940	576		457	530	383	284	492		4719	3.15%	35.66%	
7	39174000	FITTINGS, E.G. JOINTS, ELBOWS,	212				281	352	864	239	92	252	244	196	97	255	549	3633	2.42%	38.08%	
8	39241040	TABLEWARE & KITCHENWARE, C															3493	3493	2.33%	40.42%	
9	39241000	TABLEWARE AND OTHER ARTICL	189	88		83		481	683	336	301	429	170	284		403		3446	2.30%	42.71%	
10	39206200	OTHER PLATES, SHEETS, FILM, F					1967				524						934	3425	2.28%	45.00%	
11	39249000	ARTICLES OF DOMESTIC USE AN	163	71	220	52		396	696	214	366	319	222	228	55	312		3313	2.21%	47.21%	
12	39233010	CARBOYS, BOTTLES, FLASKS AN	339					589	720	415		382	245	275		340		3304	2.20%	49.41%	
13	39201000	OTHER PLATES, SHEETS, FILM, F			576						423						2249	3249	2.17%	51.58%	
111	39173210	FLEXIBLE PLASTIC TUBES, CANN				18												18	0.01%	99.98%	
112	39262090	TAKE AND COMPLEMENT THE C				17												17	0.01%	99.99%	
113	39189000	COATINGS FOR SHOES, INCL. SE				17												17	0.01%	#####	
Total			5998	2873	6991	1250	15077	11708	21910	8118	8148	9694	7603	6900	3086	9176	31348	149881	100.00%		

This should form the basis of a **Product × Market Opportunity Matrix** giving us **four categories of export opportunity**

B3. 29 Top Products in Exports: PLEXCONCIL identified 29 products contributing roughly **78% of India's plastics exports of total USD 8.63 billion**. These include FIBC/woven products, masterbatch, laminates, consumer products, packaging, medical products, toys, brushes and others. The top 5 HS codes (**630532, 392690, 320417, 482390, 420222**) **alone account for about 31%** of total plastics exports.

These 29 products are grouped into five segments:

Tier A – Scale-up champions (large and growing): 630532, 392329, 482390, 853650, 392010.

Tier B – Defend and upgrade (large but declining): 392690, 320417, 392020, 392062, 392190, 392321.

Tier C – Emerging stars (smaller but fast growing): 950300, 960321, 382319, 320619, 392069.

Tier D – Stabilise and diversify (flat): 420222, 901839, 901890, 900150, 320419, 392390, 392410, 392350, 540720.

Tier E – Revive (sharp decline): 590390, 391990, 960810, 560749.

B4 Product Category wise Export Strategies.

Strategy for Tier A segment: - Large volume and growing exports

- HS 482390 – Explore new opportunities in Japan, Poland, UK, Thailand, UAE and Malaysia.
- HS 630532 – Explore recycled-content FIBCs to meet EU packaging rules. Expand presence in Japan and South Korea; diversify into Chile (mining), Thailand and Philippines
- HS 392329 - Target new opportunities in Australia, Viet Nam, Thailand, Singapore and Malaysia.

Strategy for Tier B segment: - Large volume, but falling exports

- HS 392321 - Shift to recycled-content and certified compostable bags and bin liners to meet EU / UK retail regulations

- HS 392190 - Promote specialty sheets (polycarbonate, acrylic and signage sheets) for construction, signage and automotive. Explore certification/product marking standards in markets such as UK, Netherlands, South Korea, Viet Nam and Thailand.
- HS 320417 - Shift from commodity pigments to high-performance pigments for coatings, automotive applications and plastics coating.
- HS 392690 - Break the basket down to 8-digit level to identify winning lines (automotive, appliance, electrical and industrial components). Enrol suppliers in vendor programmes of US, German and Mexican OEMs

Strategy for Tier C segment: - Small volume but growing exports

- HS 392069 - Strengthen supply to electronics and display supply chains in Taiwan and South Korea. Invest in clean-room and precision-coating capability. Diversify into Indonesia, Malaysia, Viet Nam and Russia.
- HS 950300 -; Develop toy clusters with common design and testing facilities; Explore opportunities in Netherlands, Australia, Spain, Belgium and South Korea besides USA and EU.

Strategy for Tier D segment: - Export growth sluggish or flat

- HS 420222 – Adopt innovative design-led and private-label manufacturing for European fashion brands, promote recycled-PET bags, diversify exports to UAE, UK, South Korea, Japan, Australia and Singapore.
- HS 901839 - Attract contract manufacturing for global med-tech firms in medical device parks.
- HS 392390 - Promote reusable transport packaging (crates, pallets, IBC components) aligned with EU re-use targets. Diversify exports to Netherlands, Belgium, Japan, Singapore and South Korea through logistics and retail supply chains.

Strategy for Tier E segment: - Sharp decline in Exports

- HS 960810 - Refresh product lines with recycled-plastic and refillable pens (EU sustainability demand), Pursue private label for European office-supply chains; target Spain, Netherlands, Canada, Czech Republic, Africa and the Middle East.
- HS 560749 - Develop UV-stabilised, high-tenacity and recycled ('ghost-net') ropes with sustainability certification.

B5 Export Opportunities in FTA countries: PLEXCONCIL also identified 25 high potential export products to India's six existing Free Trade Agreements (FTAs) partner countries - **United Kingdom, Australia, the United Arab Emirates (UAE), Oman, Switzerland and Norway**. These six FTA markets collectively represent imports of approximately **USD 7.2 billion** across the **25 identified product-country combinations**, while India currently exports only about **USD 158 million**, translating into a modest **2.2% market share**. Increasing India's presence to a minimum **5% market share** across these identified products would generate an estimated **additional export opportunity of about USD 210 million**, demonstrating substantial untapped potential for Indian manufacturers and exporters.

The largest opportunities are concentrated in the **United Kingdom (about USD 80 million)**, **Australia (about USD 46 million)** and **Switzerland (about USD 45 million)**, while the **UAE** serves as a major re-export hub for the GCC and African markets; **Oman** provides an opportunity to replace indirect UAE re-exports with direct shipments from India. **Switzerland and Norway**, under the India-EFTA Trade and Economic Partnership Agreement (TEPA), offer access to high-value European markets

Notably, **China does not have FTAs with the UK, EFTA countries or the UAE**, giving Indian products a preferential duty advantage in these markets.

The identified priority products comprise labour-intensive and value-added plastic products with strong international demand and significant scope for export diversification. These include **travel bags (HS 420292)**, **switches (HS 853650)**, **sacks and bags (HS 392321)**, **tableware (HS 392410)**, **kitchenware**, **floor coverings**, **packaging products**, **closures**, **crates**, **ropes and related plastic articles**. Among these, **travel bags**, **switches**, **sacks and bags**, and **tableware** appear in three or more FTA markets, making them ideal candidates for coordinated multi-country export promotion initiatives.

B6 Productise Export Strategies: The following product-wise strategies outline targeted interventions to enhance India's market share, improve commercial presence and maximise the benefits available under these FTAs.

Every important product and Market should be classified into one of four categories:

Category	Large Market	Smaller Market
High Indian share	DEFEND & SCALE UP	NICHE LEADERSHIP
Low Indian share	MAJOR OPPORTUNITY	SELECTIVE OPPORTUNITY

This approach will prevent Government support from being spread too thinly.

DEFEND & SCALE: FIBC, woven products and other areas where India has demonstrated competitiveness.

MAJOR OPPORTUNITY: Large markets where India's penetration is currently low.

NICHE LEADERSHIP: Products where India can establish global leadership even though the total market is relatively small.

SELECTIVE OPPORTUNITY: Products where Government support should be limited unless a clear competitive advantage exists.

Five strategic priorities: The entire export growth efforts should be built around five objectives:

- 1. COMPETE:** Reduce avoidable cost disadvantages.
- 2. UPGRADE:** Technology, automation, tooling, design and productivity.
- 3. ACCESS:** FTAs, standards, certification, buyers and OEMs.
- 4. DIVERSIFY:** Reduce excessive dependence on a few markets.
- 5. SCALE:** Build companies capable of supplying global customers consistently.

C. Constraints:

Over 90% of Plastics processors are in MSME. The boost to export of finished product will come from MSME sector only. MSME sectors is facing constraints in the following areas for day-to-day operations which hampers the accelerated growth of exports.

C1: OPPI has cited multiple reasons for low market share of India in exports such as.

- High cost of raw materials
- Insufficient scale of downstream processing
- Greater concentration in semi-finished/commodity products
- Limited investment in high-end product development
- Technology gap
- High logistics and freight costs
- Limited international certifications
- Non-tariff barriers
- Weak FTA utilisation
- Limited market intelligence at HS-6/8-digit level
- Insufficient global branding
- Limited overseas distribution networks
- High cost of certification and compliance
- Inadequate product design capability
- Insufficient integration between polymer producers and converters
- Limited access to patient/long-term capital
- Power and energy costs
- Low level of automation
- Weak integration with global value chains
- Environmental/sustainability compliance gap
- Limited export-oriented clusters
- Product fragmentation
- Limited overseas marketing expenditure
- Competition from China and ASEAN countries
- Insufficient focus on emerging markets
-

C2: Completeness Gaps Vis a vis major Exporting Countries

While we have above constraints, whereas countries such as China, Vietnam, Thailand, Malaysia, Germany, Italy, Korea etc. score over India in following areas.

1. Product value addition
2. Economies of scale
3. Product specialisation
4. Tooling & mould technology
5. Automation
6. Quality consistency
7. International standards
8. R&D and product development
9. Global OEM integration
10. Export-oriented clusters
11. Logistics
12. Market access / FTAs
13. Large-volume production
14. Design capability
15. Branding
16. Customer proximity
17. Financing
18. Raw-material integration
19. Recycling/circular plastics
20. Speed to market

D Facilitating factors

Addressing some of these opportunities and constraints for MSME will be a big help to boost exports such as.

- a) Access to verified buyers
- b) Certification costs in overseas countries
- c) Payment guarantee risks
- d) Raw material for export from domestic sources at deemed export prices
- e) Import Substitution
- f) Lack of centralised authentic information source.
- g) Compressively priced Machinery for modernising and expansion.
- h) Employment Potential in Plastic Processing Sector.
- i) PLI for select value added products for Exports

D1) Access to verified buyers

MSME is handicapped in finding out potential buyers. **Plastiworld is a step in the direction** where B2B meets are organised. These meets are limited to app 100 sellers and 100-150 buyers and that once in a year. MSME Ministry is giving support to 60-80 MSME units to **attend international exhibitions** but that number is very small compared to size of MSME processors. The numbers addressed by **Plastiworld and MSME support for Exhibition is a tiny fraction** of addressable space of MSME. They remain contented with selling in domestic market.

Plastiworld is organised by AIPMA with its own funds without Govt financial support. This needs to be scaled up many folds. This can only happen with financial support.

Plastiworld should grow into Indian Canton fair. Canton fair is held in China twice a year, A brief about Canton fair is given below,

The Canton Fair

Officially the *China Import and Export Fair*, was established in **1957** and is held **twice a year—in spring and autumn—in Guangzhou, China**. It is organised by the China Foreign Trade Centre under the Ministry of Commerce of China and the Guangdong Provincial Government.

It is one of the world's largest comprehensive B2B trade fairs. The **140th Canton Fair in October–November 2026** is spread over three phases and covers **4.1 million sq. ft. of exhibition area** (3.64 million Sq. Ft indoor Floor area and 046 million sq ft outdoor floor area).

The National Pavilion (export section) of Canton Fair 2026 is sorted into 16 categories of products, which will be exhibited in 51 sections. Over 24,000 of China's best foreign trade corporations (enterprises) take part in the fair. These include private enterprises, factories, scientific research institutions, wholly foreign-owned enterprises, and foreign trade companies.

The Fair covers a very wide range of products—from **machinery, manufacturing equipment, electrical and electronic products, chemicals and new materials, hardware and tools** to consumer products, building materials, furniture, textiles, medical products and many other finished goods.

The Canton Fair is not merely an exhibition. It functions as a **large-scale export business-development platform**, bringing together:

- Chinese manufacturers and exporters
- Overseas buyers and importers
- Product developers and sourcing companies
- Trade and logistics service providers
- Financial and other business-support services

It enables Chinese manufacturers, including SMEs, to **display products, identify overseas buyers, develop distribution relationships, receive sourcing enquiries and convert them into export orders**. The Fair also has an online platform where buyers can search exhibitors/products and communicate directly with suppliers.

For India, a similar **India Plastics Export Fair / Global Plastics Sourcing Platform** could be developed specifically around plastics and plastic products. It could bring together Indian processors, machinery manufacturers, recyclers and product manufacturers with overseas buyers.

D2) Certification costs in overseas countries

Certification process and certification cost, both pose a hurdle to MSME. Certification in overseas countries are also expensive and process may not be clear to most MSME. A single window which can guide MSME on these matters for target countries will go a long way. BIS specs are not recognised by Importers.

BIS to match the level of TUV, SGS, Intertek certified bodies. They should offer similar professional certifications and strengthen domestic testing and certification capacity, for international recognition and mutual acceptance

Also, we need to stop third party inspection agencies originating from China and other competing countries. They are capturing confidential data of Indian exporters. There is need to build safeguard around sharing of confidential data to third party overseas parties.

D3) Payment Guarantee risks

Payment guarantee or risk is another factor if resolved can push the willingness to export. Some guidance to MSME on this is also required. MSME processors remain in comfort zone by selling in domestic market and selling to repeat customers. The uncertainty of venturing in new geographies overseas and dealing with customers in different countries and different culture forces them to remain in their comfort zone.

Create more awareness about ECGC programmes so that payment risk reduces. Pre shipment and post shipment credit facilities at internationally competitive interest rates

D4) Raw material availability: From domestic sources at deemed export prices.

Raw material for exports with duty exemption is either to be imported or bought from plants in SEZ area at deemed export prices. Both involve a different process. Deemed export purchases from domestic sources is easier than importing against advance licences, The quantum of material available at deemed export needs to be increased by finding a mechanism by which other domestic producers not located in SEZ areas can offer deemed export prices on raw materials adjusted for 7.5% import duty.

Going forward the raw material requirement will increase. Importing raw material for exports gives business to overseas suppliers and uses scarce foreign exchange resources which can be avoided.

The quantum of raw material required by 2035-36 and 2047-48 can be assessed by the following calculations.

Finished goods exports in 25-26 were estimated at US\$ 4.7 Bn valued at Rs 41492 Crs (as per DCPC). But Plexconcil websites gives the exports in 25-26 values at US\$ 8.63 Bn. This takes into account chapters other than 39. This value of US\$ 8.63 Bn or Rs 76186 Crs of exports of plastics products will translates to app **Rs 58605 Crs of raw material** (assuming value addition of 30%). The Raw material required when converted to Mts comes to **5860 KTs or 58,60,000 Mts** (assuming average polymer price of app Rs 1 Lac/MT in 25-26).

The raw material required for exports will keep on growing. Given below are four different scenarios of **CARG** of 4%, 6%, 8% and 10% (Compounded Annual Rate of Growth of exports). The converting industry wants to procure entire requirement from domestic suppliers, **therefore we need a have mechanism in place to get the material at deemed export prices from other domestic producers.**

Table below indicated the polymer raw material required for exports of finished goods.

Polymer raw material requirement for exports til 2047-48				
Under four different annual growth scenarios				
Scenario	Conservativ	Likely		Optimistic
Year	4% CARG	6% CARG	8% CARG	10% CARG
25-26	5,860	5,860	5,860	5,860
30-31	7,130	7,842	8,610	9,438
35-36	8,674	10,494	12,651	15,199
40-41	10,554	14,044	18,589	24,479
45-46	12,840	18,794	27,313	39,423
47-48	13,888	21,117	31,858	47,702

AIPMA is optimistic about achieving 10% pa consistent growth in Plastics Finished Products exports till 2047-48. Finished products consumed app **5.86 million MTs raw material in 25-26**. This requirement will go up to **10.4 to 15.1 million Mts by 35-36** and **21.1 to 47.7 million MTs by 47-48**. At different growth rates in **exports of 6%, 8% and 10% pa**.

During 2025-26 estimated consumption (Production +Imports-Exports) of commodity polymers (LDPE, LLDPE, HDPE, PP, PVC, PET, PS, EPS, ABS and SAN) was 24182 KTs with breakup of Production 17910 KTs+ Imports 7310 KTs -Exports 1038 Kts.

Total **Raw material required in 25-26 at app 5860 KTs comes to 24.2%**

We are not having break up of app 5860 KTs in Deemed Exports and actual import.

There is **enormous potential of increase in domestic sales of polymer producers and saving of foreign exchange for the country** if all raw material is procured from domestic sources for exports of plastics finished products. Therefore, a mechanism is to be worked out to make the polymer raw material available for end product exports **to the converters at 7.5% less price adjusted for import duty when taken from Non SEZ plants for exports.**

D5) Import Substitution:

Similar will be the requirement of raw material for **import substitution**. That **requirement will be dependent on level of import substitution achieved.**

Import trend of finished products in seven Chapters is as below.

SR. NO	Chapter	Products	VALUE IN INR CRORE				%age Share in 2025
			YEAR 2022	YEAR 2023	YEAR 2024	YEAR 2025	
1	39	Articles of Plastics	41,406	42,668	45,389	55,342	77%
2	56	Twines and Fishing Nets	422	412	523	696	1%
3	63	FIBC Tarpauline etc	85	106	114	117	0%
4	90	Optic fibre , Spectacles etc	4,621	5,792	5,306	5,926	8%
5	94	Furnitures , Beddings, Mattres	2,897	3,225	3,343	3,943	6%
6	95	Toys, Athletics articles etc	616	1,081	1,226	1,514	2%
7	96	Brushes, Pens, Combs etc	4633	4798	4189	3901	5%
		Total	54,680	58,081	60,090	71,440	100%

Raw material requirement for import substitution in 2025 comes to **5459 Kts** based on the import value of US\$ 6.26 Bn or Rs **71440 Crs (as per DGCIS data for plastics product imports of 7 chapter)** as shown in the table. This puts the raw material potential requirement for import substitution at **5459 KTs for 25-26 alone.** (based on 71440/1.3 assuming 30% value addition, Raw material value comes Rs 54590 Crs and quantity **5459 KTs**). The 5.459 million tonnes is the indicative raw-material equivalent of the identified import base, subject to product-wise feasibility, domestic capacity of end products, quality, pricing and substitution potential.

It is interesting to note the raw material required for Exports of Finished products and for import substitution is of almost same level in 25-26.

But this is **potential replacement at present for substitution as substitution will be slow and gradual.**

Under chapter 39, substantial quantise of plastics waste is also entering in India under the regular HSN codes of Films, Sheets, Pipes etc. That needs to be **curbed by identifying the imports by value which are coming at lower than raw material prices.**

PLEXCONCIL has identified 18 value-added products where imports rose from US\$3.20 bn in FY24 to US\$4.32 bn in FY26, increasing their share of value-added imports from 42% to 48%. The largest include **FRP/composites, plastic films and sheets, consumer/ houseware products, floor coverings, cordage/fishnets and pipes/fittings.**

PLEXCONCIL proposes reducing these 18 products' share of value-added plastic imports from **48% to below 35% by FY32.**

D6) Lack of centralised authentic information source

AIPMA feels that the MSME is finding it difficult to **navigate through the maze of export related queries** such as how to locate a customer, which country has potential for my end product, who are reliable buyers there, what and Non-tariff barriers in that country of interest, what certifications are required for exporting, how much is import duty in a specific country, what price will I be competitive there, What are certification needs, what are packaging requirements wrt to circularity, Will I get my payments in time, how to get and utilise the Advance licence, What govt benefits are available to exported..... It's a difficult maze to navigate.

India which has app 50000 processors in MSME, cheap labour, backward area incentives etc still is at 1% market share in export of finished products.

The above inputs if available to MSME will speed up growth of finished product exports. AIPMA envisages a one-point solution which can answer any query of an exporter. This a difficult task to achieved but a beginning can be made.

We envisage a ‘DO IT YOURSELF’ website or Portal which will have all answers for exporters over a period of time. The following is suggested.

Establish an India Plastics Export Connect: DIY Export Helpline & Global Buyer Connect Portal. **(And avoid any duplication with details already available on the Website or portal of FIEO and PLEXCONCIL)**

The following is the thought process to start this portal DIY Export Helpline Plus Market Intelligence Plus Global Buyer Connect. The platform should have **following principal functions**.

DIY Export Helpline: An exporter can ask: What is the tariff in a particular country? Is an FTA benefit available? What is the rule of origin? What certification is required? What documents are required? Is RoDTEP available? What are the import regulations? What are the applicable standards? Where can the exporter get testing? What financing/support is available?

If the answer already exists the: **Answer to Page/tab reference**

If the answer does not exist: **Question to Unresolved Query Register to assigned authority to Approved answer to Permanent addition to website**

The website should **learn from every unanswered question** and **should evolve continuously**

Year 1 is the Foundation which should focus on: Launch website, Exporter registration. Ask a Question, 500–1,000 priority FAQs, HS-code database, FTA information, Country information, certification information

Year 2 for Expansion of scope: Incorporate all answers to Year-1 queries, Expand country/product information. add NTB database, add certification database, exporter experience database, buyer directory, Indian Missions integration

Year 3: Establish Full ecosystem” Advanced search/natural-language query: Product-country specific guidance: Regulatory-change alerts: Buyer–exporter matching: Exporter experience/references: dashboard showing recurring problems.

Within 2–3 years, an Indian plastics exporter should be able to resolve the majority of routine export questions without having to approach a government office or association individually.

Next Step is **Global Buyer Connect:** Indian exporters should be able to **voluntarily share information about overseas buyers with whom they have successfully done business**. The portal can then build a database of: **Indian exporters with demonstrated experience in international markets**.

The information should be **voluntary**, and commercially sensitive information such as prices, volumes and contract terms should not be disclosed.

Also, Overseas buyers should be able to search Indian supplier. This would make the platform a **two-way bridge: Indian exporter to overseas buyer and vice versa,**

Question is Who owns and operates the platform or portal?

Nodal ownership Govt or Industry: coordination with Govt Deptt for inputs for: policy authority, budget and governance etc

We suggest that Portal can be sponsored by DCPC with financial support and AIPMA is willing to take it forward.

Operating Agency: **Dedicated Export Digital Cell under DCPC and AIPMA will handle** daily operation, content management, query management, website maintenance, analytics, user experience and ensuring answers are updated.

Technology Partner: A professional Indian IT/digital company selected through the appropriate Government procurement mechanism.

D7) Initiatives of Govt to boost Exports.

While the list of constraints is long, there are many Govt schemes to promote exports such as shown below highlighted by OPPI;

Government of India already has a broad export-support framework in place such as:

- Export Promotion Mission (EPM)
- Niryat Protsahan
- Niryat Disha
- RoDTEP
- Advance Authorisation
- EPCG Scheme
- Market Access Initiative (MAI)

The main opportunity is to make these instruments more product-specific, technology-oriented and downstream-focused, because many plastic processors are MSMEs and compete with highly integrated manufacturing hubs. MSME must fully utilise what is available to boost export and should be widely published to MSME. The suggested portal can do that job to some extent.

D8) Competitively priced Machinery for modernising and expansion.

Technology Upgradation and Competitive Procurement recommendations of Plastics Processing Machinery

India's plastics processing sector is at an important stage of expansion. Plastics consumption/processing is required to increase from the present level of approximately **25 million tonnes to around 50 million tonnes in ten years** to support **India's growing requirements and boosting Exports** for packaging, infrastructure, agriculture, automotive, electronics, healthcare, consumer products and other sectors. Achieving this expansion will require a **substantial addition of processing capacity and corresponding investment in modern plastics processing machinery to make it globally competitive.**

At the same time, Indian plastics processors, particularly MSMEs, face high capital costs for modern machinery and have limited individual bargaining power. Access to advanced, energy-efficient and automated machinery at **internationally competitive prices** is therefore essential not only for capacity expansion but also for improving productivity, quality and the global competitiveness of Indian plastics products.

India imported Plastics processing Machinery worth US\$ 1.92 Bn and Mould worth US\$ 810 Mn during 2025

We envisage a **National Plastics Machinery Procurement & Technology Council/ Platform** be established.

The platform would aggregate machinery requirements from Indian plastics processors and facilitate **demand aggregation and competitive procurement**.

The Platform major role would include:

- Aggregate requirements for injection moulding, extrusion, blow moulding, thermoforming, recycling, packaging and other specialised machinery.
- Develop **standard technical specifications and performance benchmarks** in consultation with machinery users and technical experts.
- Invite competitive offers from **Indian as well as international machinery manufacturers**, ensuring access to appropriate technology at globally competitive prices.
- Negotiate volume discounts, equipment financing, warranty, installation, training, spare parts and after-sales service.
- Establish **benchmark prices and total-cost-of-ownership parameters**, including energy consumption, productivity, maintenance and machine life.
- Facilitate technology partnerships and transfer of advanced technologies to Indian machinery manufacturers.
- Promote **energy-efficient, automated, digital and Industry 4.0 technologies**, along with advanced recycling machinery.
- **Enable individual processors to place their own purchase orders, thereby ensuring that the Council does not assume inventory, credit or warranty risks.**

The initiative would create a **large aggregated market for machinery**, giving Indian processors greater purchasing power while simultaneously creating opportunities for Indian machinery manufacturers to achieve scale, improve technology and become more competitive globally and reduce dependence on **China or other countries for import of Machinery**.

The objective should be to enable Indian processors to obtain the **best available technology at globally competitive total cost**.

The initiative would accelerate technology modernisation and capacity creation required to support the expansion of India's plastics processing sector from **25 million tonnes to 50 million tonnes in 10 years**.

This would directly support the objective of expansion of capacity in line with demand at with overall reduction of cost of operation. This will help the Indian processing sector to become globally complete and substantially increase India's exports of finished plastics and packaging products.

D9) Employment Potential in Plastics Processing Sector in MSME.

India Plastics processing sector comprising over 50000 processors have over 90% in MSME. Lacs of families are surviving based on the plastics processing sector. The Plastics processing sectors uses various plastics namely LDPE, LLDPE, HDPE, PP, PVC and PET which are used in daily use consumer article, Flexible and Rigid packaging as well as in Infrastructure, Agriculture, drip irrigation and Health care.

MSME is the employment generator in the country. Most MSME units involved in Plastics processing are labour intensive. It is estimated that app 4.5 million persons are involved in plastics processing MSME.

In the foregoing we have discussed the present plastic consumption in the country is app 25 MMTA which will go up to 50 MMTS by 2035-36 and may be 100 MMTA by 2047-48. On the supply side large crackers to produce polymers have to keep pace with the supply.

The real boost in employment will come from processing sector. **Present processing capacity will have to be ramped up from 25 MMTA to 50 MMTS to meet the demand and further to 100 MMTA by 2047-48.** Along with setting up the processing units, this sector will require matching processing machineries and Moulds. That will generate a massive amount of expansion in Plastics processing machines and mould. India imported machinery worth US\$ 1.92 Bn and moulds worth US\$ 810 Mn in 2025.

Going forward, the existing 25 MMTS processing capacity will need technology upgradation and additional 25 MMTA new plastic processing capacity. Moreover, with the infrastructure growth taking place in next 20 years till 2047 and 100 new clusters coming up in BHAVYA scheme of 100 to 1000 acres in area, India Plastics processing will spread across the country which is concentrated in Western part of India at present.

Plastics processing sector has the potential to increase the present employment from 4.5 million to 10 million by 2035 and 20 million by 2047.

D10) PLI for select Plastics end products for exports:

PLI to be introduced for select High Value-added exports where India has competitive advantage. This step will bring export focus in MSME converters. Presently they are satisfied with selling in domestic market and export is not the primary objective. There is a need to bring a change in the mindset of MSME producers.

E. Recommendations.

The overall recommendation which summarises the above discussions are given below. More granular analysis of issues and plan of action area for export are in the inputs given by **PLEXCONCIL** and **OPPI** which are attached with the report

S NO	Specific industry problem / demand from Government	Action required & responsible organisation	Time-bound outcome Short Term/Medium Term and Long term
1	India has only 1.03% share of the US\$571.6 bn seven-chapter market.	Create a Top 15–20 Product × Market Export Programme using the 15-country/7-chapter and HSN databases of AIPMA. And 29 product framework of PLEXCONCIL	Priority product-market list within 6 months , with individual export targets.
2	Excessive dependence on USA, Germany and UK.	Develop targeted programmes for Europe, Japan, Australia, ASEAN, GCC, Africa and Latin America. Industry: nominate products and buyers.	Annual export targets for identified diversification markets.
3	PLI for select Plastics end products for exports	PLI to be introduced for select High Value-added exports	6-12 months
4	Embedded taxes/costs reduce competitiveness.	Product-wise review of RoDTEP/embedded taxes for priority downstream products.	Recommendations on priority HS codes within 6 months .
5	Polymer raw material to be made available for end product exports to the converters at 7.5% less price adjusted for import duty when taken from Non SEZ plants for exports	Finished goods exports in 25-26 were estimated at US\$ 8.63 Bn. Finished products consumed app 5.86 million MTs raw material in 25-26. This requirement will go up to 10.4 to 15.1 million Mts by 35-36 and 21.1 to 47.7 million MTs by 47-48. At different growth rates in exports of 6%, 8% and 10% pa. Raw material for exports to be procured from Domestic producers. Enormous potential of increase in domestic sales of polymer producers and saving of foreign exchange for the country.	A mechanism to be worked out 1-2 Years Time frame.

6	Technology/productivity gap. A Technology Upgradation fund for processing sector, Machinery and Mould making.	Establish a Plastics Export Technology Upgradation Programme or Fund which includes Processing Machine upgrades, Machinery Manufacturing and Mold making. A fund of Rs 10000 Crores is requested for Industry to invest in automation, robotics, energy efficiency and digital manufacturing, Modern Machinery making and Mould Making.	3–5 pilot technology/common facilities in first 12 months .
7	International certification is costly for MSMEs.	Create support/reimbursement for priority international testing and certification at 4-5 locations to begin with. BIS to be upgraded to the level of TUV, SGS, Intertek certified bodies. They should offer similar professional certifications Stop third party inspection agencies originating from China and other competing countries. Build safe guards around confidential data of Indian exporters.	Scheme operational within 12 months .
8	FTA benefits are not sufficiently utilised.	Indian Missions help also to sought to Create product-specific FTA guides covering tariff, rules of origin, standards, NTBs and buyer opportunities.	Guides for all priority product-market pairs within 6 months .
9	India Plastics Export & Global Sourcing Fair: modelled partly on the Canton Fair	Plastiworld is step in the direction of B2B engagements in a small way. This should ultimately become Indian Canton Fair. A very large B2B fair modelled on the lines of Canton fair to promote plastics exports. Modalities to be worked out for financing the same and making it self-sustaining.	To materialise in next 2 years.

10	Significant imports of value-added plastic products.	Targeted import-substitution/vendor-development programme, with technology/JVs where necessary; simultaneously build export capability. Curb waste import under wrong classification. It could be done by checking value of imported goods if it below raw material price.	Reduce identified import dependence; PLEXCONCIL has proposed reducing the share of the identified 18 products below 35% by FY32.
11	Exporters lack a single practical source of answers, market information and buyer leads.	Govt Sponsored Industry owned: Establish the "India Plastics Export Connect – DIY Export Helpline & Global Buyer Portal". AIPMA can take this responsibility.	Launch core portal within 12 months ; progressively build comprehensive knowledge base and buyer network over 2–3 years.

3. Conclusion:

India's plastics export challenge is not a shortage of global demand. The 15-country analysis shows a US\$571.6 billion seven-chapter import market against India's exports of only US\$5.9 billion, giving India an overall share of approximately 1%. The opportunity is therefore enormous. Indian Exporters are required to be brought out from their comfort zone and experiment with export on a much larger scale.

However, India should not pursue a generic export-promotion approach. It should identify the largest product-market opportunities, distinguish them from smaller niche opportunities, address specific competitiveness and market-access barriers, diversify beyond a few major markets and move into higher-value applications.

Two most important imperatives are to make the raw material available at internationally competitive prices from domestic sources and fast track modernisation and expansion of Plastics processing capacity from 25 MMTA to 50 MMTA in next 10 years.

Government could help on those interventions which only Government can undertake, while Industry to take responsibility for technology, productivity, quality, certification, product development and buyer conversion.

The proposed **India Plastics Export Connect platform** can become a lasting institutional mechanism for this transformation—starting as a DIY Export Helpline and evolving over 2–3 years into a comprehensive knowledge, market-intelligence and global buyer–Indian exporter connection platform.

Annexure-I Data Tabel1

Import from the world for Chapter 39 by 15 top importing companies.

Chapter 39 Total Imports of Top 25 HSN codes by Top 15 countries in 2025																					
			Green Cells Imports of over US\$ 1 Bn					Red Cells Imports of US\$ 500 Mn to US\$ 1 Bn								In US \$ Million					
	HSN Code	HSN description	Belgi um	Brazil	Canad a	Chile	China	Franc e	Germ any	Italy	Japan	Netherl and	Polan d	Spain	Turke y	UK	USA	Total	%age Share	Cum %age	
1	39269097	ARTICLES OF PLASTICS AND ART	1481					3496	7614	1920		2628	2309	1600	975	2391		24414	16.29%	16.3%	
2	39232100	SACKS AND BAGS (INCLUDING C	250			102	96	542	944	235	1076	556	229	210		720	2682	7641	5.10%	21.4%	
3	39231090	BOXES, CASES, CRATES AND SIM	276			26		506	871	481		724	310	777	202	446	1465	6086	4.06%	25.4%	
4	39181010	FLOOR COVERINGS OF VINYL TIL	160						347			249				270	4349	5375	3.59%	29.0%	
5	39239000	ARTICLES FOR THE CONVEYANC	300				313	344	795	252	216	341	232	221	104	340	1755	5213	3.48%	32.5%	
6	39199080	PLATES, SHEETS, STRIPS, RIBBO	441					615	940	576		457	530	383	284	492		4719	3.15%	35.7%	
7	39174000	FITTINGS, E.G. JOINTS, ELBOWS,	212				281	352	864	239	92	252	244	196	97	255	549	3633	2.42%	38.1%	
8	39241040	TABLEWARE & KITCHENWARE, C															3493	3493	2.33%	40.4%	
9	39241000	TABLEWARE AND OTHER ARTICL	189	88		83		481	683	336	301	429	170	284		403		3446	2.30%	42.7%	
10	39206200	OTHER PLATES, SHEETS, FILM, F					1967				524						934	3425	2.28%	45.0%	
11	39249000	ARTICLES OF DOMESTIC USE AN	163	71	220	52		396	696	214	366	319	222	228	55	312		3313	2.21%	47.2%	
12	39233010	CARBOYS, BOTTLES, FLASKS AN	339					589	720	415		382	245	275		340		3304	2.20%	49.4%	
13	39201000	OTHER PLATES, SHEETS, FILM, F			576						423						2249	3249	2.17%	51.6%	
14	39235090	STOPPERS, LIDS, CAPS AND OTH	176		303			576	613	270		259	281	297	104	271		3151	2.10%	53.7%	
15	39219090	PLATES, SHEETS, FILM, FOIL AN	113	66		37	591	412	634	226		310	271	175		295		3131	2.09%	55.8%	
16	39269090	PLASTIC ARTICLES AND MANUFA		707		244	2175											3126	2.09%	57.9%	
17	39199090	PLACAS, LAMINAS, HOJAS, CINTA		159		24	2592											2775	1.85%	59.7%	
18	39202021	PLATES, SHEETS, FILM, FOIL AN	228					260	593	433		150	283	279	144	276		2647	1.77%	61.5%	
19	39269002	ARTICLES OF PLASTICS AND ART									2580							2580	1.72%	63.2%	
20	39249056	HOUSEHOLD ARTICLES AND HYG															2456	2456	1.64%	64.8%	
21	39269099	ARTICLES OF PLASTICS, NES			1499												681	2181	1.45%	66.3%	
22	39181090	FLOOR COVERINGS, WHETHER	173		503			253	404	281		340				219		2173	1.45%	67.7%	
23	39173900	FLEXIBLE TUBES AND PIPES, MA	119	136			145	293	518	161		239		158	111	137		2017	1.35%	69.1%	
24	39232990	SACKS AND BAGS, INCL. CONES,	152		111			301	322	172		226	143	238		317		1982	1.32%	70.4%	
25	39235000	STOPPERS, LIDS, CAPS AND OTH		87			150				223						1518	1978	1.32%	71.7%	
26	39201025	PLATES, SHEETS, FILMS, STRIPS	178					230	470	177		205	148	180	46	193		1826	1.22%	72.9%	
27	39209990	PLATES/SHEETS/FLM/FOIL/STRIP		51			1694											1745	1.16%	74.1%	
28	39263000	FITTINGS FOR FURNITURE, COAC	120	85					869					227	230	56	137		1725	1.15%	75.3%
29	39202000	OTHER PLATES, SHEETS, FILM, F			324						240						1080	1645	1.10%	76.4%	
30	39206219	PLATES, SHEETS, FILMS, STRIPS	127	74				207	355	298			133	144	102	200		1642	1.10%	77.5%	
31	39264000	STATUETTES & OTHER ORNAME				20					230	154				151	1060	1615	1.08%	78.5%	
32	39259000	*STRUCTURAL ELEMENTS FOR T			197	62					103						1227	1588	1.06%	79.6%	
33	39252000	DOORS, WINDOWS AND THEIR F							744	245		418						1407	0.94%	80.5%	
34	39173200	FLEXIBLE TUBES, PIPES AND HO	155				296	225	403					222		103		1402	0.94%	81.5%	
35	39259080	STRUCTURAL ELEMENTS USED	116					281	392				230		114	256		1389	0.93%	82.4%	
36	39231000	BOXES, CASES, CRATES AND SIM			685		440				160							1285	0.86%	83.3%	
37	39233000	CARBOYS, BOTTLES, FLASKS AN									272						981	1253	0.84%	84.1%	
38	39269010	MACHINE PARTS OR COMPONENT					1201											1201	0.80%	84.9%	
39	39201024	STRETCH FILM OF NON-CELLULA	136					261	359					169		220		1145	0.76%	85.7%	
40	39211900	PLATES, SHEETS, FILMS, STRIPS			145			201	389				140			182		1057	0.71%	86.4%	
41	39201089	PLATES, SHEETS, FILM, FOIL, TA	109							160		161	142	124	133	206		1035	0.69%	87.0%	
42	39199050	SELF-ADHESIVE PLATES, SHEETS															941	941	0.63%	87.7%	
43	39235010	STOPPERS, LIDS, CAPS AND OTH	110			42		236	183		147			137	47			902	0.60%	88.3%	
44	39261000	OFFICE AND SCHOOL SUPPLIES,						203		130	184		220	122				858	0.57%	88.8%	
45	39233090	CARBOYS, BOTTLES, FLASKS AN	172	229	366													768	0.51%	89.4%	
46	39269045	OTHER GASKETS AND WASHERS															740	740	0.49%	89.9%	
47	39253010	BLINDS(INCLUDING VENETIAN B															727	727	0.49%	90.3%	
48	39162000	MONOFILAMENT WITH ANY CROS				32				268		175	232					707	0.47%	90.8%	
49	39269075	PNEUMATIC MATTRESSES & OTH															684	684	0.46%	91.3%	
50	39249010	NAPKINS, TABLE COVERS, MATS,															640	640	0.43%	91.7%	
51	39191080	SELF-ADHESIVE PLATES, SHEETS							371				139	116				626	0.42%	92.1%	
52	39219040	PLATES, SHEETS, FILM, FOIL & S															579	579	0.39%	92.5%	
53	39263050	FITTINGS FOR FURNITURE, COAC															558	558	0.37%	92.9%	
54	39207300	PLATES/SHEETS/FLM/FOIL/STRIP					547											547	0.37%	93.2%	
55	39239090	ITEMS FOR TRANSPORTING OR		53	420	32												506	0.34%	93.6%	
56	39219060	PLATES, SHEETS, FILM, FOIL AN								136			204			146		485	0.32%	93.9%	
57	39201090	PLATES/SHEETS/FILM/FOIL/STRIP					481											481	0.32%	94.2%	
58	39209100	PLATES, SHEETS, FILM, FOIL AN		59			180						162		60			461	0.31%	94.5%	
59	39199000	SELF-ADHESIVE PLATES,SHEETS			444													444	0.30%	94.8%	
60	39232190	FOOD PACKAGING SACKS AND B			439													439	0.29%	95.1%	
61	39211990	OTHER PLATES/SHEETS/FLM/FOI					411											411	0.27%	95.4%	
62	39211390	PLATES, SHEETS, FILM, FOIL AN		83			131					180						393	0.26%	95.7%	
63	39219000	OTHER PLATES, SHEETS, FILM, F			391													391	0.26%	95.9%	
64	39203000	PLATES, SHEETS, FOIL, FILM AND						206					167					372	0.25%	96.2%	
65	39202090	PLATES/SHEETS/FILM/FOIL/STRIP					307											307	0.20%	96.4%	
66	39191099	OTHER FILM OF PLASTIC, BASED					303											303	0.20%	96.6%	
67	39205100	PLATES/SHEETS/FLM/FOIL/STRIP					279														

Annexure-II Data Table 2

Import from the world for Seven Chapter by 15 top importing companies.

2025-26 Total Imports by top 15 importing countries for 7 Chapters containg Plastics End Products																	
Imports from the world in Million US\$																	
Chapter	Belgium	Brazil	Canada	Chile	China	France	Germany	Italy	Japan	Netherlands	Poland	Spain	Turkey	UK	USA	Total	Chapter Share
39	5,998	2,873	6,991	1,250	15,077	11,708	21,910	8,118	8,148	9,694	7,603	6,900	3,086	9,176	31,348	#####	26%
56	467	304	711	93	995	605	1,314	567	860	565	609	423	213	643	2,269	10,639	2%
63	258	47	284	118	31	616	930	273	518	616	213	323	42	391	1,624	6,284	1%
90	6,471	2,283	5,091	746	21,570	8,992	18,912	7,081	10,643	22,040	3,117	4,782	1,745	7,213	47,678	#####	29%
94	3,651	1,320	5,596	688	1,854	9,126	16,776	3,680	6,845	8,469	3,680	4,487	820	10,234	38,811	#####	20%
95	2,348	1,125	4,438	650	2,809	6,088	9,771	3,048	8,030	7,747	4,630	4,097	711	9,337	33,505	98,332	17%
96	1,106	570	1,647	308	729	2,031	3,163	981	1,170	1,407	953	1,092	545	1,999	4,352	22,052	4%
Total	20,300	8,522	24,758	3,854	43,064	39,165	72,775	23,747	36,214	50,539	20,805	22,103	7,162	38,993	#####	#####	100%
Country Share	3.6%	1.5%	4.3%	0.7%	7.5%	6.9%	12.7%	4.2%	6.3%	8.8%	3.6%	3.9%	1.3%	6.8%	27.9%	100.0%	
Export from Indin in 2025-26 in US\$ Millions																	
Chapter	Belgium	Brazil	Canada	Chile	China	France	Germany	Italy	Japan	Netherlands	Poland	Spain	Turkey	UK	USA	Total	Ch Share
39	35	40	73	17	60	69	152	66	20	68	44	68	22	212	554	1,501	25%
56	1	5	21	9	3	4	7	5	1	6	3	7	2	27	171	272	5%
63	58	9	36	29	2	102	114	73	2	107	27	112	1	92	370	1,135	19%
90	35	59	18	6	64	133	107	37	17	99	34	10	23	69	296	1,007	17%
94	28	32	44	5	9	114	198	19	12	114	19	74	6	116	484	1,272	22%
95	5	2	32	2	3	23	42	6	4	19	22	10	3	93	241	507	9%
96	8	23	6	5	4	6	30	8	3	5	4	2	3	29	59	195	3%
Total	170	170	230	72	145	451	651	213	59	416	152	283	61	638	2,175	5,887	100%
Country Share	2.9%	2.9%	3.9%	1.2%	2.5%	7.7%	11.1%	3.6%	1.0%	7.1%	2.6%	4.8%	1.0%	10.8%	36.9%	100.0%	
Share of India in Imports from the world in 2025-26																	
Chapter	Belgium	Brazil	Canada	Chile	China	France	Germany	Italy	Japan	Netherlands	Poland	Spain	Turkey	UK	USA	Total	
39	0.6%	1.4%	1.0%	1.4%	0.4%	0.6%	0.7%	0.8%	0.2%	0.7%	0.6%	1.0%	0.7%	2.3%	1.8%	1.0%	
56	0.2%	1.8%	3.0%	9.4%	0.3%	0.6%	0.5%	0.8%	0.1%	1.0%	0.4%	1.7%	1.1%	4.3%	7.6%	2.6%	
63	22.5%	19.8%	12.6%	24.2%	7.7%	16.6%	12.3%	26.6%	0.4%	17.3%	12.8%	34.8%	3.5%	23.6%	22.8%	18.1%	
90	0.5%	2.6%	0.3%	0.8%	0.3%	1.5%	0.6%	0.5%	0.2%	0.4%	1.1%	0.2%	1.3%	1.0%	0.6%	0.6%	
94	0.8%	2.4%	0.8%	0.7%	0.5%	1.2%	1.2%	0.5%	0.2%	1.3%	0.5%	1.6%	0.7%	1.1%	1.2%	1.1%	
95	0.2%	0.2%	0.7%	0.4%	0.1%	0.4%	0.4%	0.2%	0.1%	0.2%	0.5%	0.2%	0.4%	1.0%	0.7%	0.5%	
96	0.7%	4.0%	0.4%	1.7%	0.5%	0.3%	1.0%	0.8%	0.2%	0.3%	0.4%	0.2%	0.6%	1.5%	1.3%	0.9%	
Total	0.8%	2.0%	0.9%	1.9%	0.3%	1.2%	0.9%	0.9%	0.2%	0.8%	0.7%	1.3%	0.9%	1.6%	1.4%	1.0%	
56 for rope and net, non-woven fabric,						90 Optical, Photographical , surgical etc						95 for toys, and					
63 for woven fabric, bags FIBC,						94 for furniture,						96 for brushes and some other items.					

Annexure-III Data Table 3

29 High Potential products where India can become global supplier							
HS Code	Product panels	India Exports USD million		Share in India' exports FY25	Share in India's exports FY26	Major markets	Alternative Markets
		2024-25	2025-26				
'630532	FIBC, Woven sacks, Woven fabrics, Tarpaulin	928.16	1074.47	7.7%	8.8%	USA, Japan, Germany, S Korea, France, Spain	Chile, Thailand, Philippines
'392690	Miscellaneous products and items nes	863.33	785.73	7.2%	6.5%	USA, Germany, Mexico, France, China	Thailand, UK, Viet Nam, Canada, South Korea
'320417	Masterbatch	860.01	747.31	7.2%	6.2%	Germany, USA, China, Belgium, Japan	South Korea, Viet Nam, Spain, Turkey
'482390	Floorcoverings, leathercloth & laminates	521.53	556.09	4.3%	4.6%	USA, Mexico, Germany, Canada, Viet Nam	Japan, France, Poland, UK, Thailand, UAE, Malaysia
'420222	Consumer & houseware products	541.17	541.06	4.5%	4.5%	China, USA, Italy, France, Germany, Spain	South Korea, UK, Japan, Netherland, Singapore, Mexico, Canada, Poland, Russia, Australia, Thailand
'392329	FIBC, Woven sacks, Woven fabrics, Tarpaulin	486.04	533.06	4.0%	4.4%	USA, Mexico, UK, Germany, France, Spain, Netherland	Thailand, Australia, Viet Nam, Singapore, Malaysia
'901839	Medical items of plastics	512.68	512.33	4.3%	4.2%	USA, Netherland, Germany, Japan, China, Belgium	France, Mexico, UK, South Korea, Australia, Saudi Arabia, Singapore
'901890	Medical items of plastics	478.6	497.9	4.0%	4.1%	USA, China, Germany, Netherland, Mexico	UK, Canada, Australia, Spain, South Korea, Switzerland
'392020	Plastic films and sheets	405.54	349.5	3.4%	2.9%	USA, Germany, Italy, Poland, France	UK, Mexico, Spain, China, Turkey, Viet Nam, Thailand, South Korea, UAE, Malaysia
'392190	Plastic films and sheets	364.4	341.98	3.0%	2.8%	USA, Germany, Mexico, France, Poland	UK, China, Netherland, South Korea, Viet Nam, Thailand
'382319	Masterbatch	304.23	338.82	2.5%	2.8%	China, Malaysia,	Singapore, South Korea, UK, Belgium,

29 High Potential products where India can become global supplier							
HS Code	Product panels	India Exports USD million		Share in India' exports FY25	Share in India's exports FY26	Major markets	Alternative Markets
		2024-25	2025-26				
						Netherland, Italy, USA, Germany	Philippines, Japan, Kenya
'392062	Plastic films and sheets	386.33	296.12	3.2%	2.4%	China, USA, Japan, Germany, Viet Nam, South Korea	UK, Mexico, Indonesia, Poland, Philippines, Turkey
'320419	Masterbatch	302.31	290.38	2.5%	2.4%	France, Germany, Belgium, Mexico, USA, Thailand	China, Turkey, UAE, UK
'853650	Consumer & houseware products	238.18	250.67	2.0%	2.1%	USA, Germany, China, Mexico, France, Japan	UK, Czech Rep, Netherland, Spain, Singapore, Thailand, Viet Nam, South Korea
'392069	Plastic films and sheets	220.19	232.4	1.8%	1.9%	Taiwan, South Korea, USA, China, Germany, Mexico	Russia, Indonesia, France, Italy, Malaysia, UK, Viet Nam
'392390	Packaging items - flexible, rigid	218.16	222.22	1.8%	1.8%	USA, Mexico, Germany, Canada, France, UK	Netherland, China, Belgium, Japan, Singapore, South Korea, Viet Nam
'392010	Plastic films and sheets	188.88	202.83	1.6%	1.7%	USA, Germany, France, UK, Canada, Mexico	Netherland, Spain, Japan, Australia, Viet Nam, Indonesia, South Korea
'950300	Consumer & houseware products	169.46	200.89	1.4%	1.7%	USA, Germany, Japan, UK, France, Poland	Netherland, Australia, Spain, Belgium, South Korea, Russia
'392321	Packaging items - flexible, rigid	218.56	196.62	1.8%	1.6%	USA, Japan, Germany, UK, Canada, France	Netherland, Mexico, Australia, Viet Nam, Russia, South Korea
'392410	Consumer & houseware products	173.49	176.15	1.4%	1.5%	USA, Germany, France, Canada, UK, Japan	Netherland, Japan, Saudi Arabia, Mexico, Australia, UAE
'900150	Medical items of plastics	159.21	164.02	1.3%	1.4%	USA, France, Germany, Mexico, China	Netherland, Thailand, UK, Japan, South Korea, Switzerland

29 High Potential products where India can become global supplier

HS Code	Product panels	India Exports USD million		Share in India' exports FY25	Share in India's exports FY26	Major markets	Alternative Markets
		2024-25	2025-26				
'590390	Floorcoverings, leathercloth & laminates	224.68	153.45	1.9%	1.3%	Viet Nam, USA, Mexico, China, Bangladesh, Italy	Cambodia, Germany, Indonesia, Morocco, Russia, Turkey
'391990	Plastic films and sheets	160.51	150.62	1.3%	1.2%	China, Viet Nam, USA, Germany, Mexico, France	Italy, Poland, South Korea, Thailand, UK, Malaysia, Russia
'960810	Writing instruments & stationery	166.26	149.22	1.4%	1.2%	USA, France, Germany, Italy, Mexico, UK	China, Spain, Netherland, Canada, Russia, Czech Rep, South Korea
'540720	FIBC, Woven sacks, Woven fabrics, Tarpaulin	129.05	124.49	1.1%	1.0%	USA, Canada, Brazil, Netherland, Germany, Poland	France, Japan, Malaysia, Viet Nam
'392350	Packaging items - flexible, rigid	113.38	113.99	0.9%	0.9%	USA, Germany, France, Mexico, Canada	Italy, Spain, Poland, UK, Japan, UAE
'560749	Cordage, fishnets & monofilaments	130.52	113.46	1.1%	0.9%	USA, Netherland, Indonesia, Germany, Norway	Chile, UK, Viet Nam, Singapore, Australia, UAE
'320619	Masterbatch	89.67	98.15	0.7%	0.8%	Germany, France, UK, Belgium, USA, China	Spain, Thailand, Poland, Viet Nam, Japan, Malaysia
'960321	Consumer & houseware products	79.18	91.81	0.7%	0.8%	China, Germany, Switzerland, Netherland	Viet Nam, Poland, Sweden, Hungary, USA, Thailand, Japan, Malaysia

Source: DGCIS, Govt of India; ITC Trademap; Compiled by Plexconcil

Annexure-IV Data Table 4

Import Substitution Opportunities

These products include **high-grade films & sheets, FRP & composites, electrical insulation fittings, building elements of plastics, plastic sanitary ware, floor coverings, travel bags, pipes & fittings, plastic frames & mountings for spectacles**

Top value added products whose imports have surged in 3 years (import value USD mln)							
HS Code	Product Panels	2023-24	2024-25	2025-26	Apr-Aug 2026	CAGR (FY24-26)	Share in total im
'39269099	FRP & Composites	1011.34	1064.04	1228.46	547.68	10%	
'39199090	Plastic films and sheets	537.43	627.74	657.77	288.34	11%	
'39201099	Plastic films and sheets	234.29	338.38	551.08	207.94	53%	
'85472000	Consumer & houseware products	175.37	187.74	239.63	120.66	17%	
'59039090	Floorcoverings, leathercloth & laminates	123.78	160.84	228.49	89.46	36%	
'39206290	Plastic films and sheets	145.01	151.06	149.66	69.65	2%	
'39204900	Plastic films and sheets	119.53	136.12	158.82	66.74	15%	
'59032090	Floorcoverings, leathercloth & laminates	98.88	126.89	145.58	63.87	21%	
'39259090	Consumer & houseware products	59.01	71.73	113.53	63.82	39%	
'39162019	Cordage, fishnets & monofilaments	83.59	103.98	113.44	60.09	16%	
'39174000	Plastic pipes & fittings	62.09	74.31	89.55	48.67	20%	
'39202090	Plastic films and sheets	73.5	82.94	110.95	46.57	23%	
'39239090	Packaging items - flexible, rigid	101.7	106.45	107.09	43.07	3%	
'39229000	Consumer & houseware products	71.79	79.64	86.08	40.51	10%	
'42021290	Consumer & houseware products	80.17	95.59	92.15	39.4	7%	
'90031100	Consumer & houseware products	44.71	57.38	56.86	37.51	13%	
'39211900	Plastic films and sheets	75.78	84.31	89.49	37.3	9%	
'59031090	Floorcoverings, leathercloth & laminates	98.7	93.9	105.04	35.48	3%	
Total of 18 products		3196.67	3643.04	4323.67	1906.76		
Grand Total of value added products		7529.02	7866.84	8920.2	3941.14		
Source: DGCIS; Compiled by Plexconcil							