

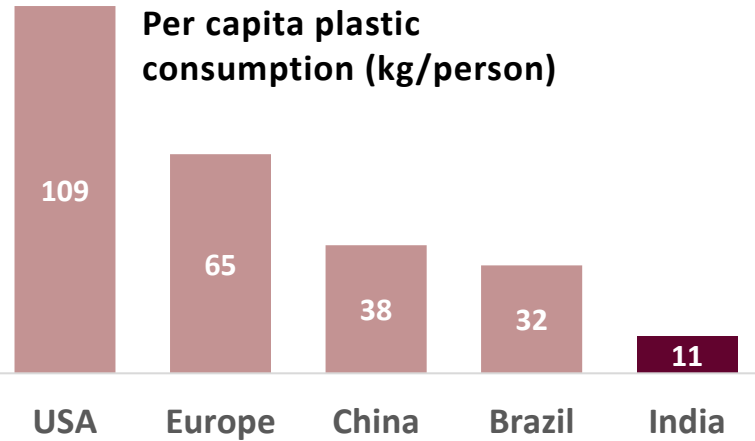
Opportunities in the Indian Plastics Sector

June 2020

INDIAN PLASTICS SECTOR: MARKET OVERVIEW

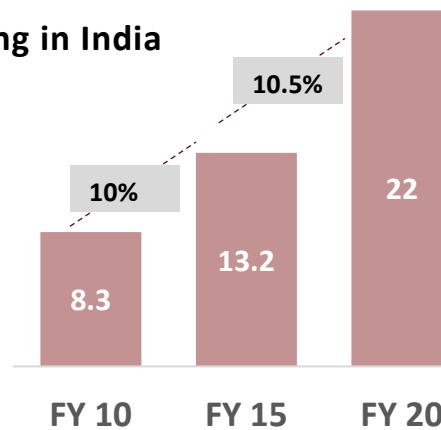
FEW GLOBAL HIGHLIGHTS

- Largest manufacturer of Lami tubes
- Largest Rotomolded Tank market in the world
- Largest manufacturer of BOPP tubes
- Polybenzimidazole (PBI)-only producer in the world
- 2nd largest exporter of FIBC bags
- 5th largest producer of PP

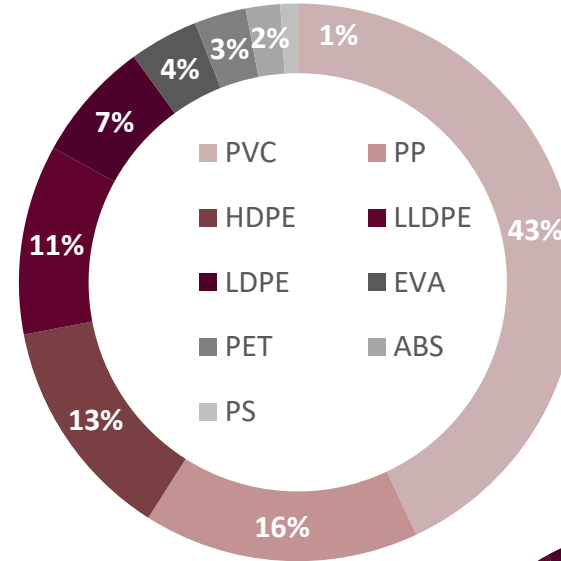


SOURCE: AIPMA and Plastindia, TATA strategic analysis

Plastic Processing in India (MMTPA)



SOURCE: Industry reports, TATA strategic analysis

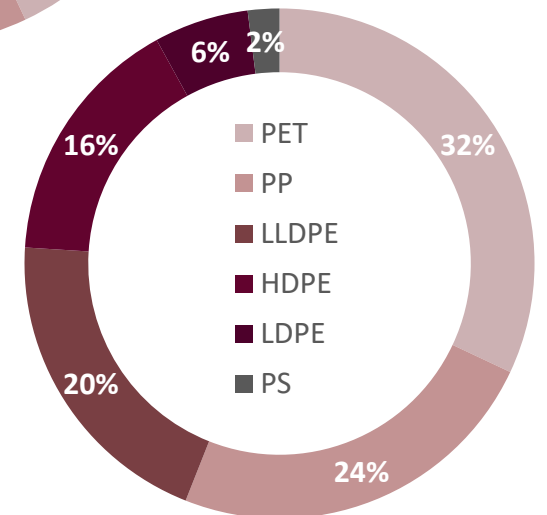


IMPORT TRENDS 2018-19

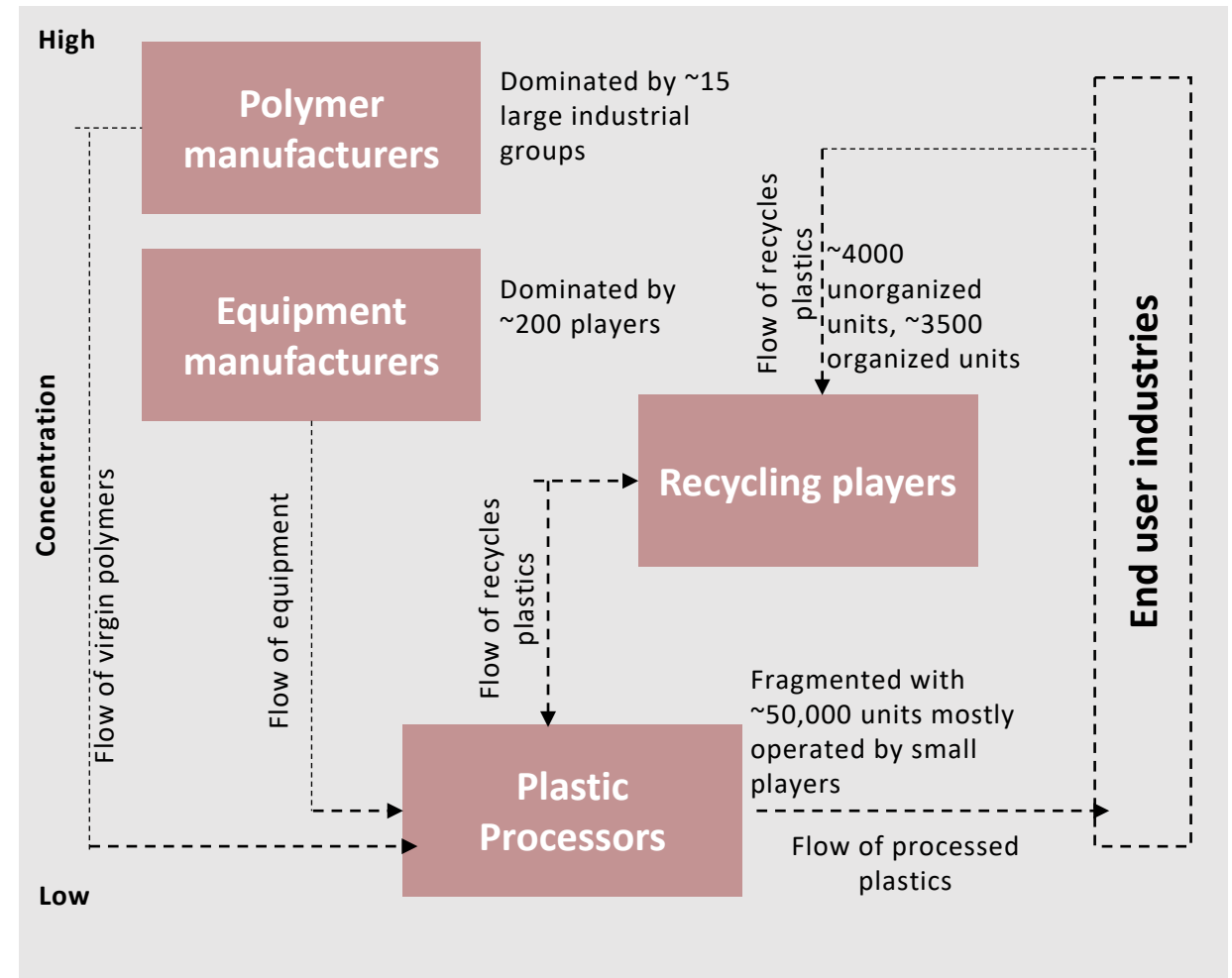
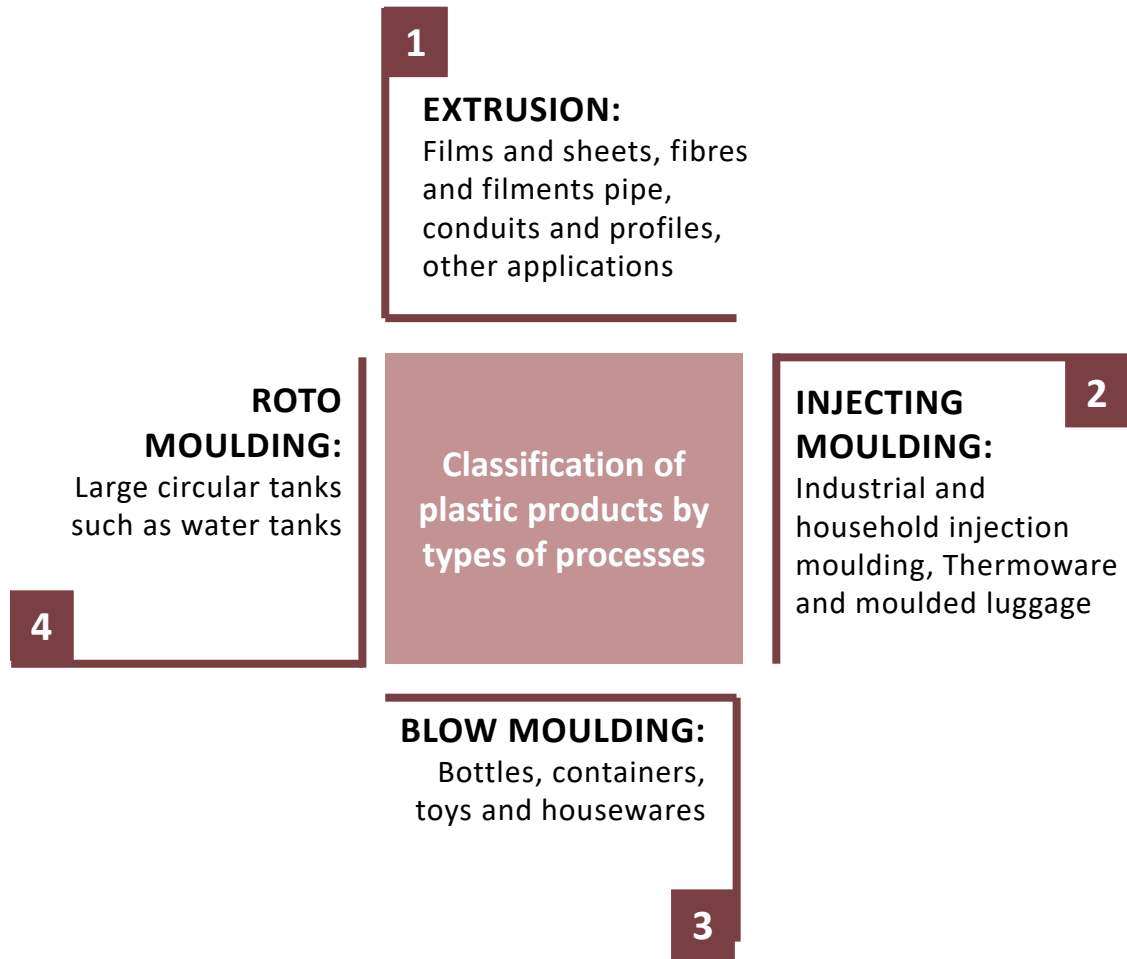
Total imports:
4191 KT

EXPORT TRENDS 2018-19

Total exports:
2523 KT



INDIAN PLASTICS SECTOR: *INDUSTRY STRUCTURE*



INDIAN PLASTICS SECTOR: MANUFACTURING & CAPACITY

CAPACITY

Major Thermoplastics capacity (2019)
17 million metric tonnes

Polyolefins
11,770 kilo tonnes

Styrenics
457 kilo tonnes

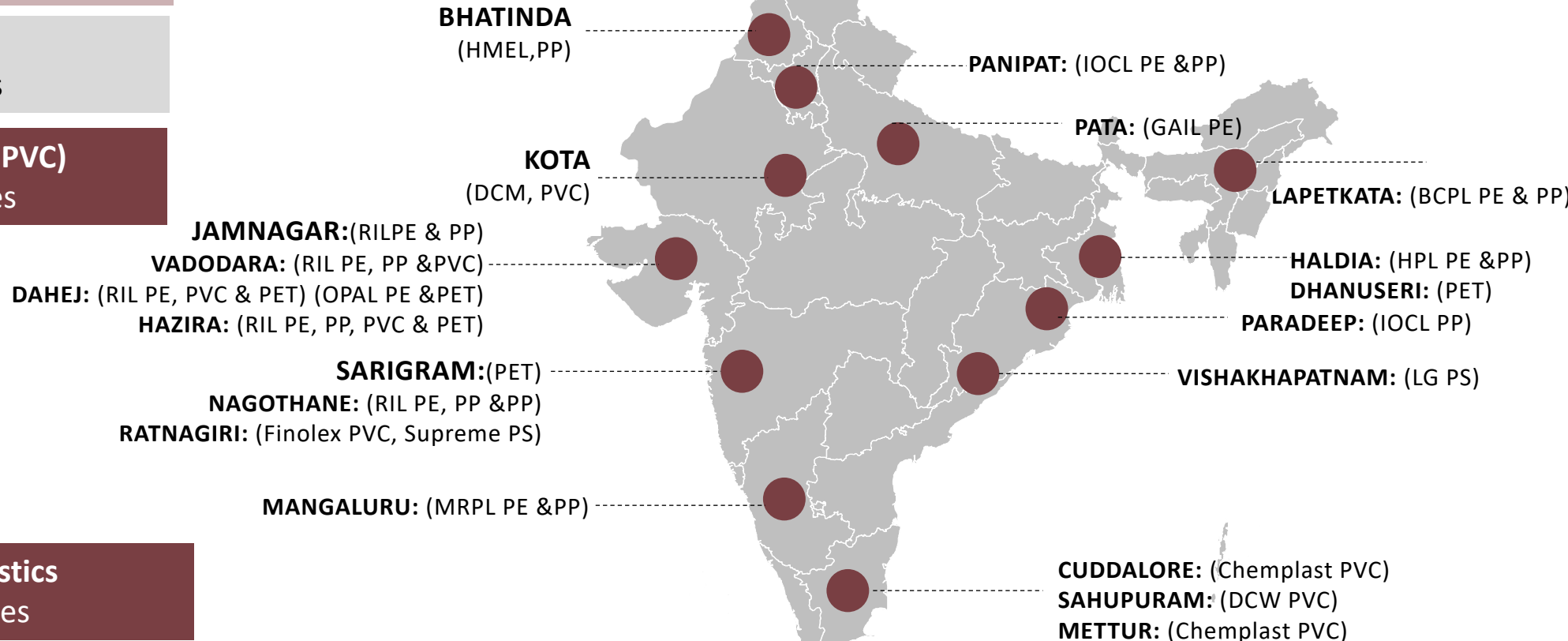
Polyvinyl Chloride (PVC)
1,560 kilo tonnes

Major Engineering Plastics
498 kilo tonnes

Polyethylene Terephthalate (PET)
2,730 kilo tonnes

Performance Plastics
3,285 kilo tonnes

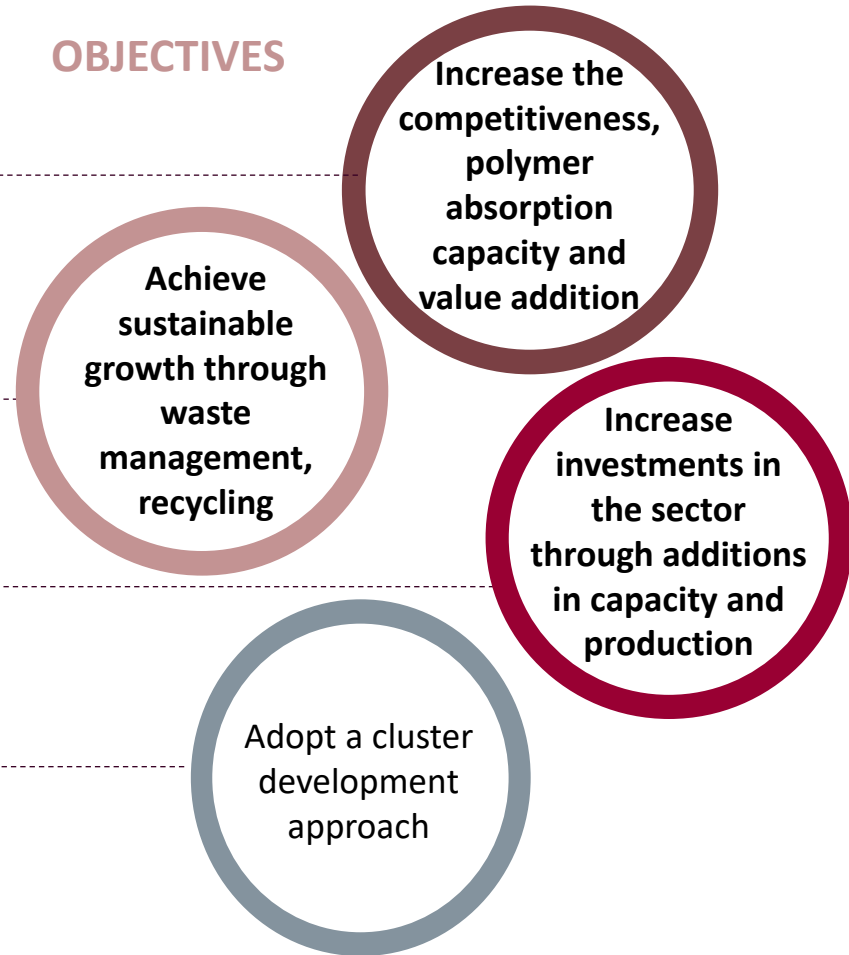
MANUFACTURING CLUSTERS



INDIAN PLASTICS SECTOR: SEZs and PLASTIC PARKS

The government has been taking proactive steps to increase plastic production in India

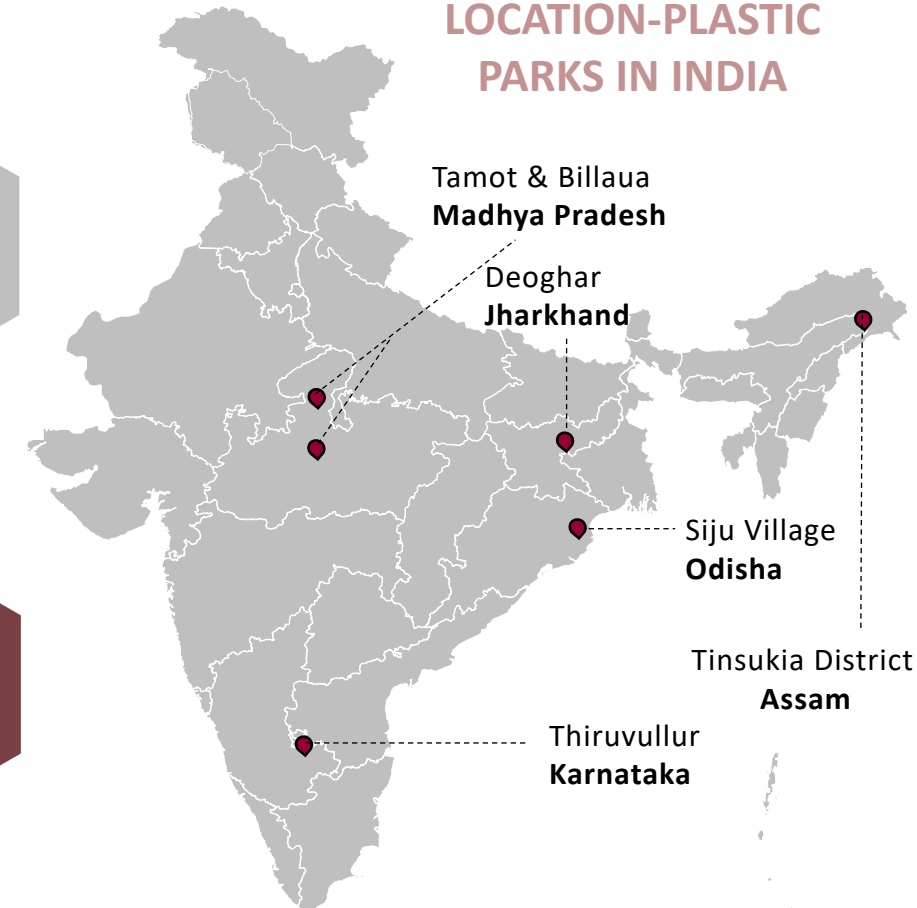
OBJECTIVES



FACILITIES

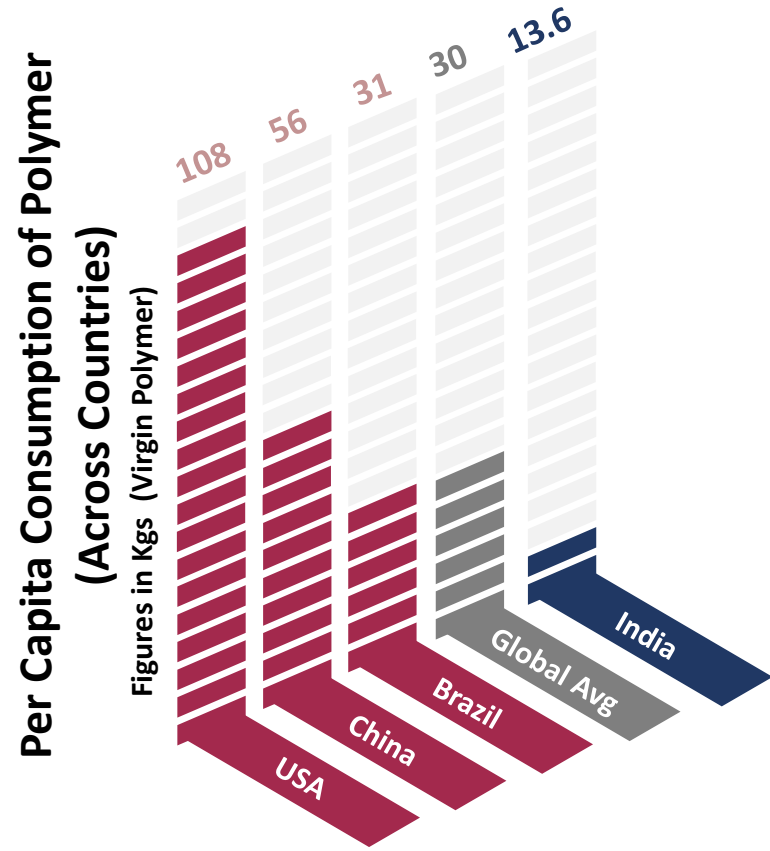


LOCATION-PLASTIC PARKS IN INDIA

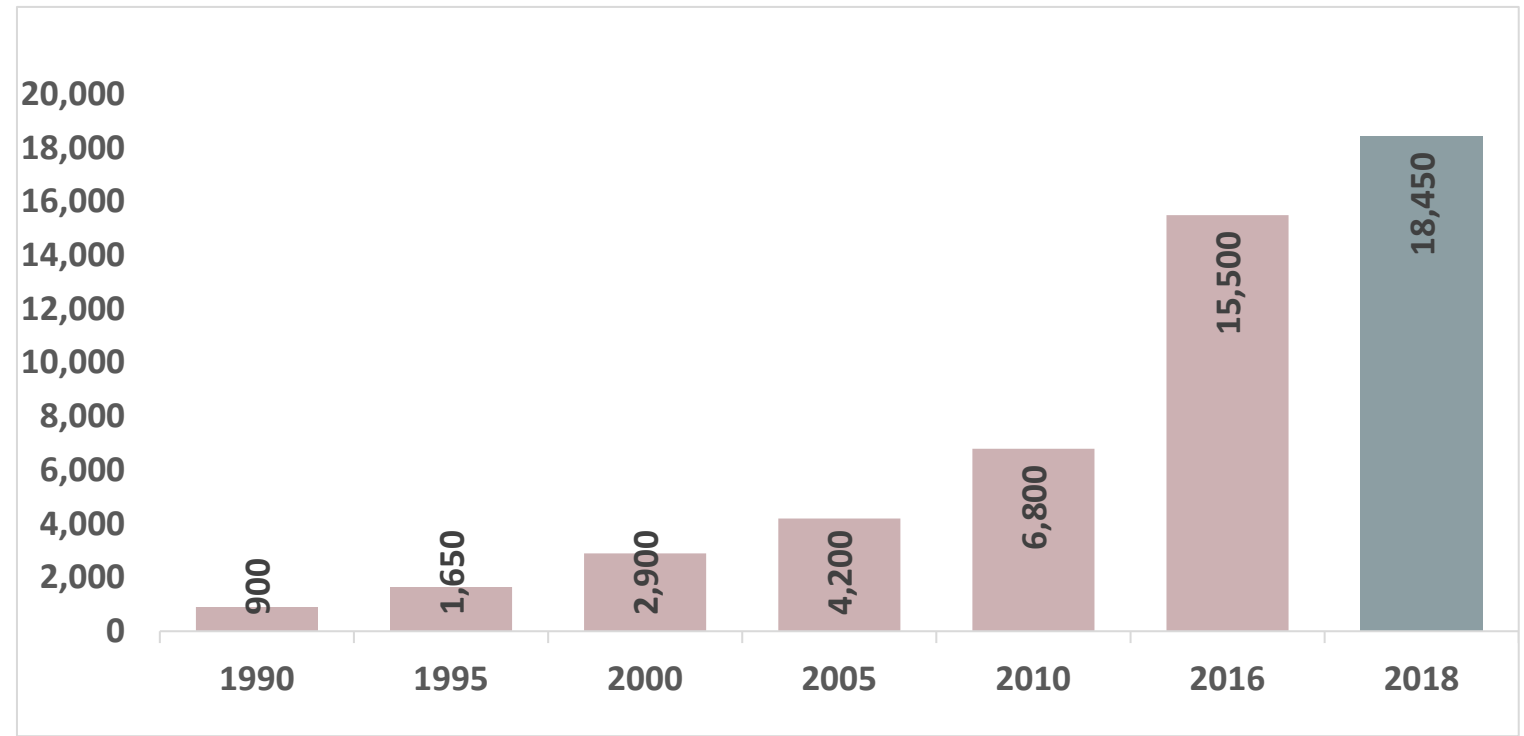


INDIAN PLASTICS SECTOR: DEMAND

Although much lower than the global average of use of polymers, a growth trend has been seen in the demand over the years with the demand having increased 20 times in the past 20 years as opposed to the population increase of 1.5 times



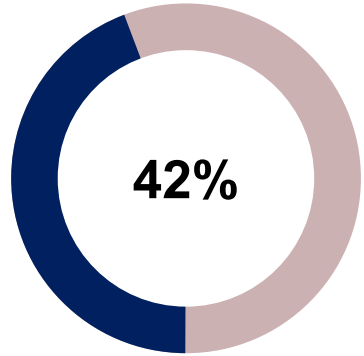
Growth in Demand for Plastics over the year (KTU)



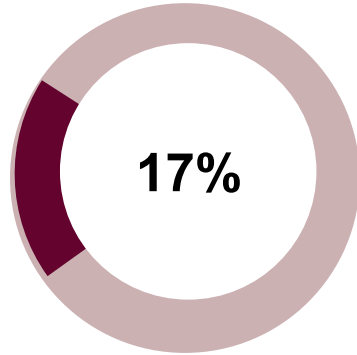
Source: Plastindia.org

INDIAN PLASTICS SECTOR: DEMAND SEGMENTATION

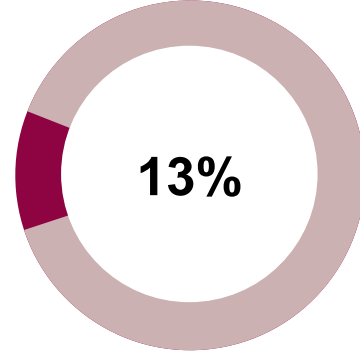
Consumption Segments



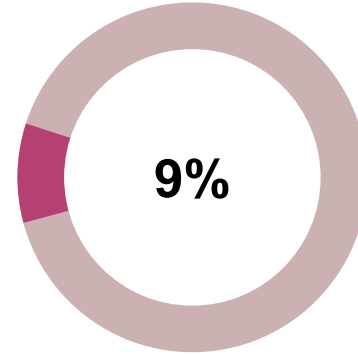
Flexible Packaging



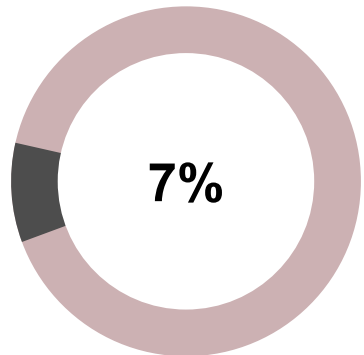
Rigid Packaging



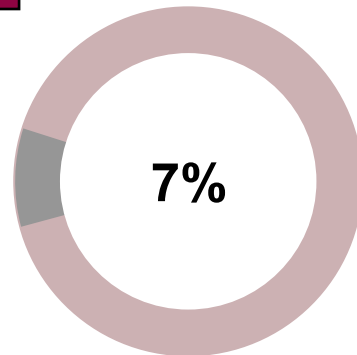
Building &
Construction



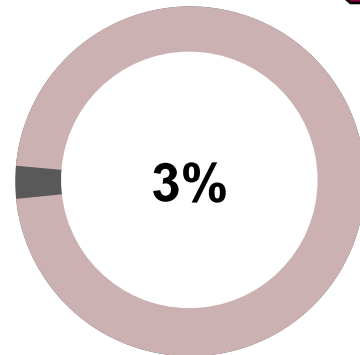
Agriculture



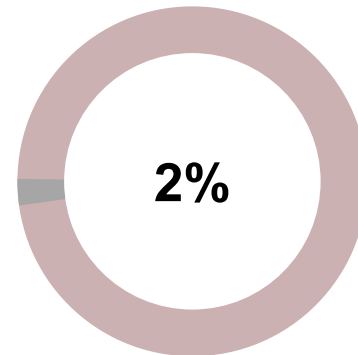
Household



Automotive

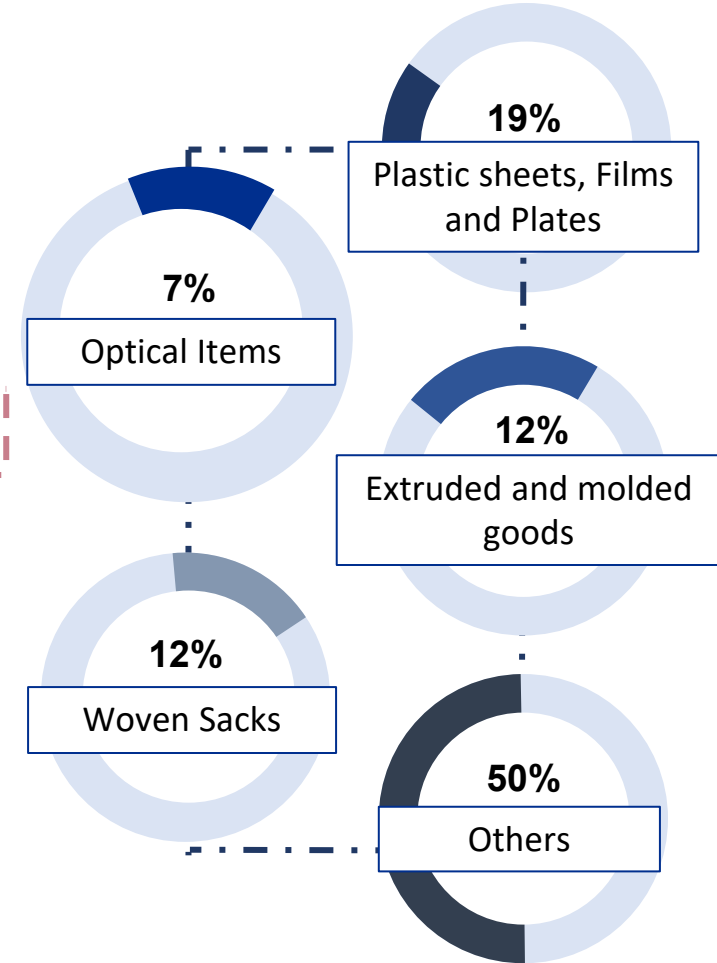


Others

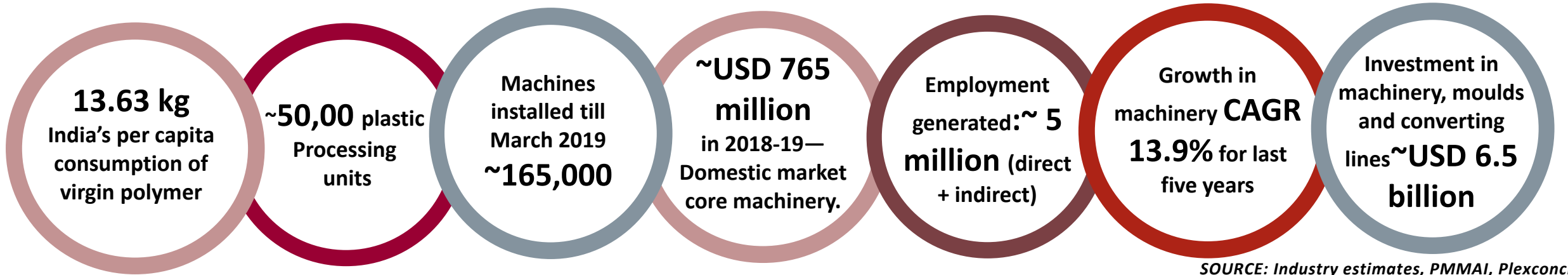


Electronics

Production Segments



INDIAN PLASTICS SECTOR: MACHINERY INDUSTRY OVERVIEW



SOURCE: Industry estimates, PMMAI, Plexconcil

Extrusion Machinery

Total Machines till 2019: 43,540

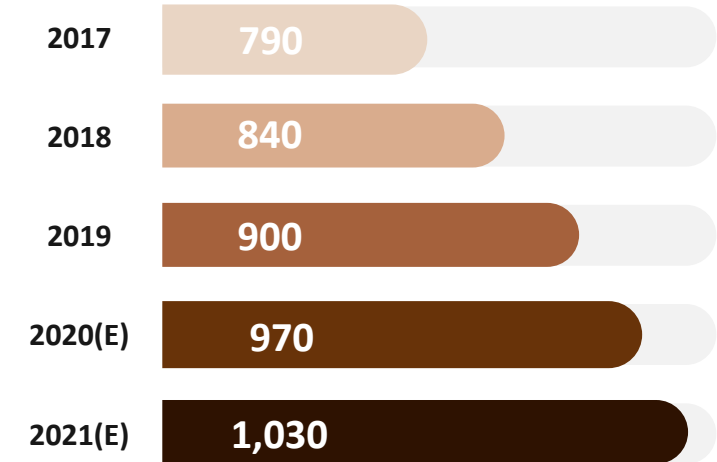
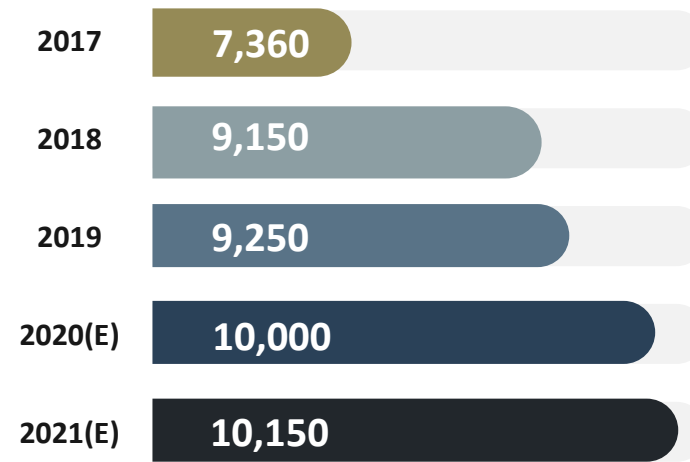
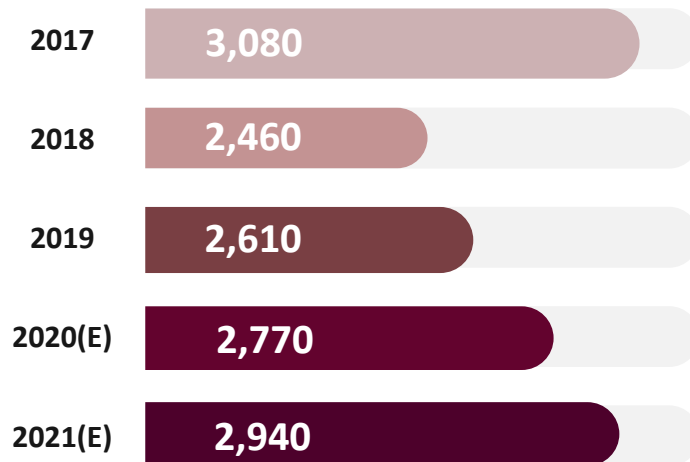
Injection Moulding Machinery

Total Machines till 2019: 108,510

Blow Moulding Machinery

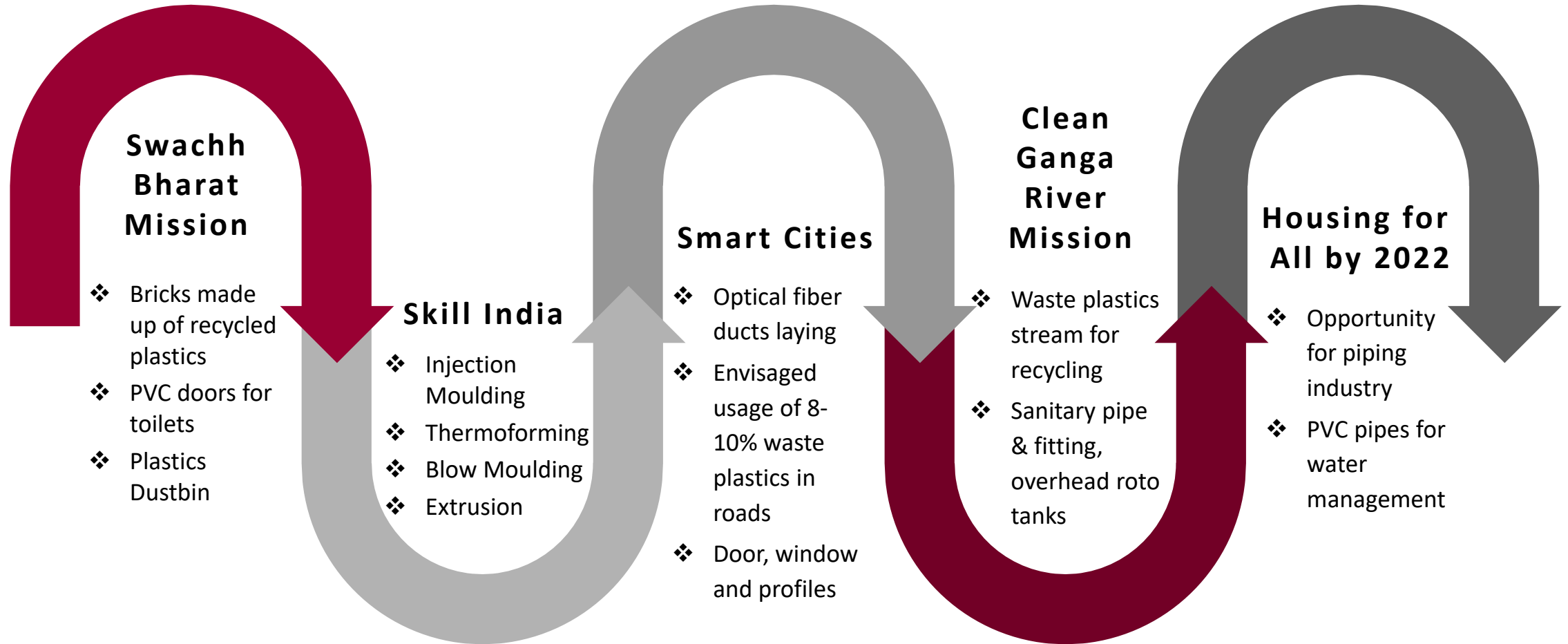
Total Machines till 2019: 12,890

MACHINERY DEMAND FORECAST



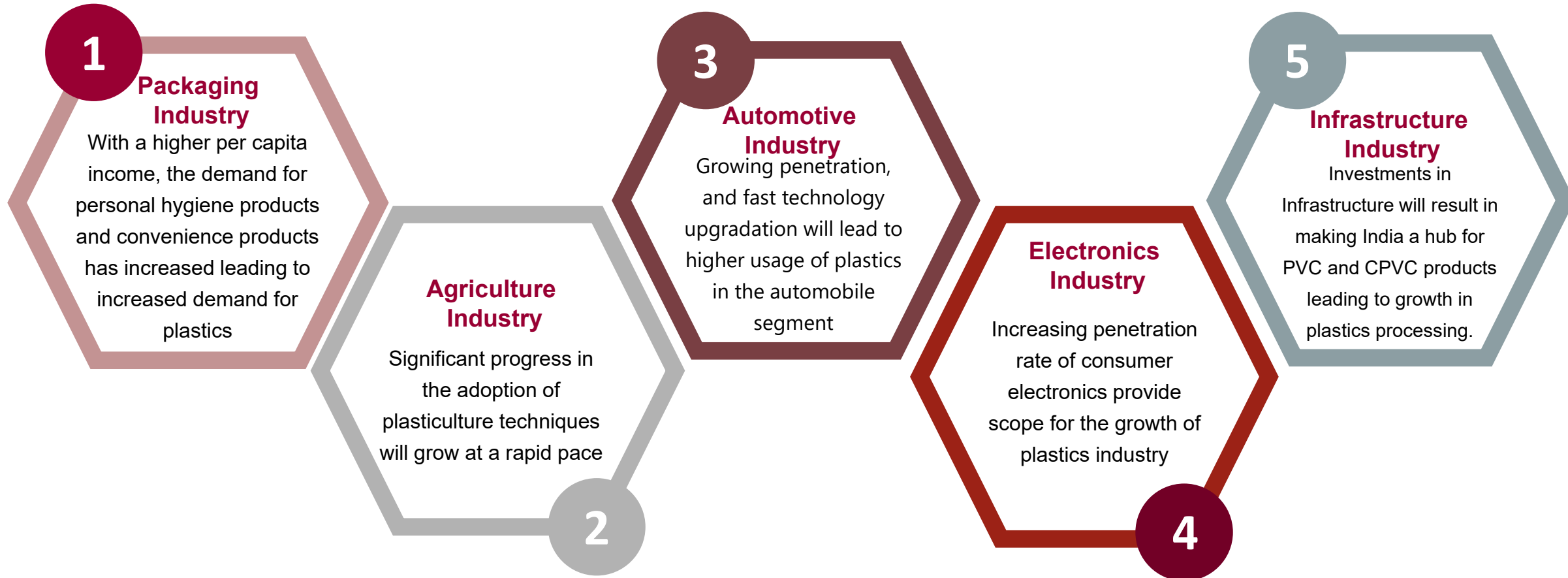
SOURCE: PlastIndia

INDIAN PLASTICS SECTOR: *GOVERNMENT INITIATIVES*



Source: Sustainable Infrastructure with Plastics, FICCI, Plastindia.org

INDIAN PLASTICS SECTOR: *GROWTH DRIVERS*



INDIAN PLASTICS SECTOR: MARKET OPPORTUNITY



PLASTICULTURE

Plastic materials may be employed in water conservation, irrigation efficiency, crop protection, crop storage and transportation.

BIO-PLASTICS

Growing interest in green products, healthier lifestyles and growing concern to protect environment is leading to a shift towards bio-plastics.

EFFECTIVE WASTE MANAGEMENT

Plastic has low energy requirements during production, hence considered to be energy efficient. It consumes ~25% less energy in production compared to other alternatives

PLASTIC MOULDED FURNITURE SEGMENT

The popularity of plastic furniture has grown since it offers features unavailable in conventional wooden and metal furniture, such as easy maintenance, light weight, durability .

SWISS PRESENCE IN INDIA



THANK YOU