



Plastindia Foundation

**Report
on
Indian Plastics Industry
2013 – 2017
Edition 2**

November 2014

Committee Members

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Contents

India Overview	4 – 13
Polymer Manufacturing Capacity	14 – 19
Polymer Consumption	20 – 35
Masterbatch/Additives	36 – 41
Imports/Exports	42 – 46
Plastics Recycling	47 – 50
Machinery Manufacturing Industry	51 – 60
Auxiliary Equipment	61 – 62
Polymer Growth Opportunities	63 – 70
Conclusion	71 – 77

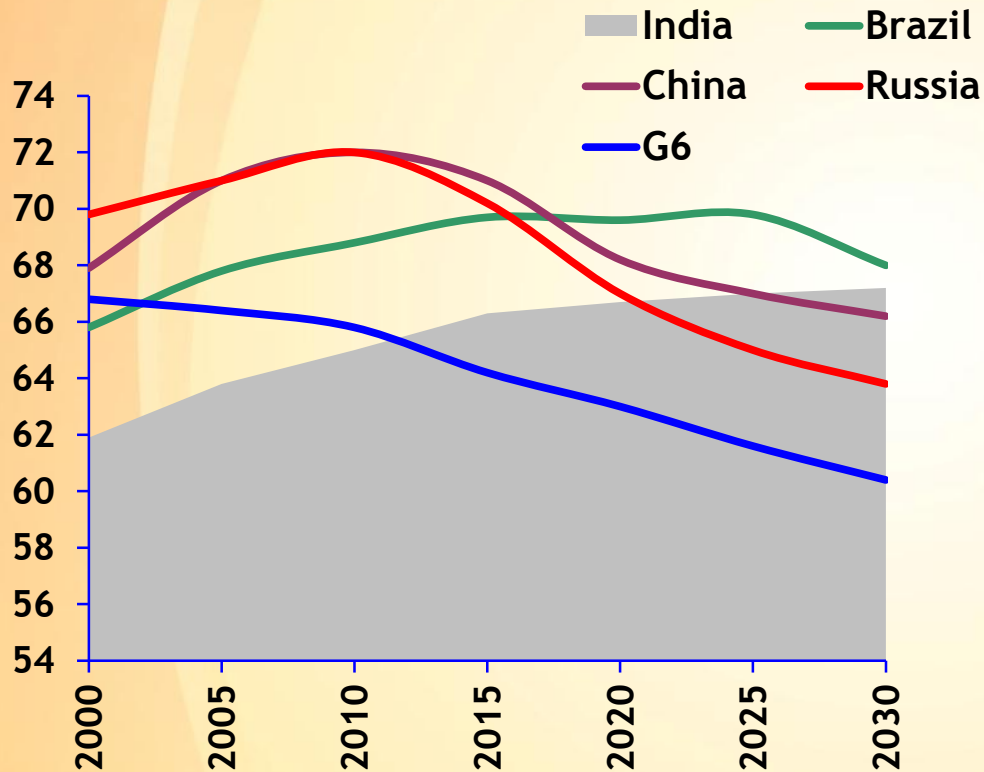
India Snapshot

- Population 1.25 Bn (4 times US)
- Largest parliamentary democracy
- Secular state - no state religion
- Independent judiciary
- 23 official languages, business language predominantly English
- Excellent social infrastructure – education, healthcare, travel & recreation.
- Third largest economy on PPP basis (appx. US \$5 trillion)

.....land of billion opportunities

Demographic Profile

Working Age Population as % of Total Population (Age 15 - 60)



- 66% of India in the working age group - 768m
- Median age - 24 years

Large potentially productive workforce

Indian Sub-Continent



Country	Mn. Sq. KM	Population (Million)	GDP (PPP) Bn US\$
Afghanistan	0.65	29	45
Bangladesh	0.14	164	324
Bhutan	0.04	2	5
India	3.29	1250	4990
Maldives	0.30	0.3	3
Nepal	0.14	30	42
Pakistan	0.80	170	574
Sri Lanka	0.66	20	134
Total	6.02	1665	6117

23% of world population accounting for less than 7% of GDP

Indian Economy



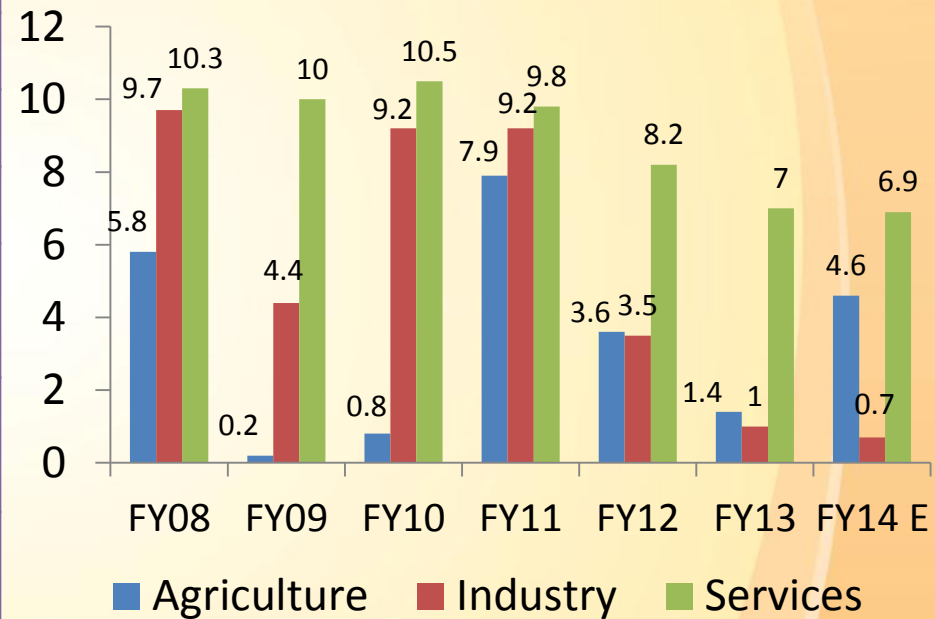
(%)		2010-11	2011-12	2012-13	2013-14
GDP (Factor Cost)		8.4	6.9	4.5	4.9
Growth	Agriculture	5.0	2.7	1.4	4.6
	Industry	8.6	8.2	1	0.7
	Services	9.4	9.6	7	6.9
	Total	8.4	6.9	4.5	4.9
Inflation	WPI-Average	8.0-8.5	9.2	7.3	5.98
Interest rate	10-year G-Sec	8.1-8.3	8.5	8.1	8.4
Exchange rate	Re / US \$ (Year-end)	43.5	48	54.4	60.06
Fiscal deficit	As a % of GDP	4.8	5.7	5.2	4.50

10th largest in the world by nominal GDP and the 3rd largest by PPP

Advantage India

Year	GDP Growth	Polymer Growth	Import Duty
1990-1995	5.0%	12.9%	50%+
1995-2000	6.5%	14.6%	40%
2000-2004	5.9%	5.8%	45%-15%
2005-2012	8.7%	10.9%	12.5% (H) - 5% (L)
2012-2017 12 th Plan	8.0%	10.6%	7.5%-5% ?
2017-2022 13 th Plan	9.5%	10.4%	5%-0% ?

Growth in GDP components



GDP Growth → Strong Relation to Petrochemical Growth

Growth Drivers for India - Key Indicators

- **Economic Advantage**
 - 3rd largest economy globally
 - Indian equity market is 3rd biggest in Asia
- **Demographic Advantage**
 - Emergence of middle class - rising household income
 - Growing consumer market - booming **retail sector**
 - Large workforce = highly skilled & educated
 - 2nd largest English speaking population
- **Urbanisation** 31% -2010 to 35% -2020
- **Globalisation** Share of India in world trade more than doubled from US\$ 312 bn in 2006/07 to US\$ 805 bn in 2013/14

India entering the league of developed nations by 2020

Growth Drivers for India - Key Indicators

By 2020,

- Productivity growth to help India sustain > 8% growth
- Per Capita GDP will more than double
- Demand for automobiles to increase five fold
- Additional 100 million work force
- 140 million rural dwellers to move to urban areas
- **Infrastructure** (Rail, Road & Ports) to attain global standards



India entering the league of developed nations by 2020

Growth Drivers - Examples of Growth

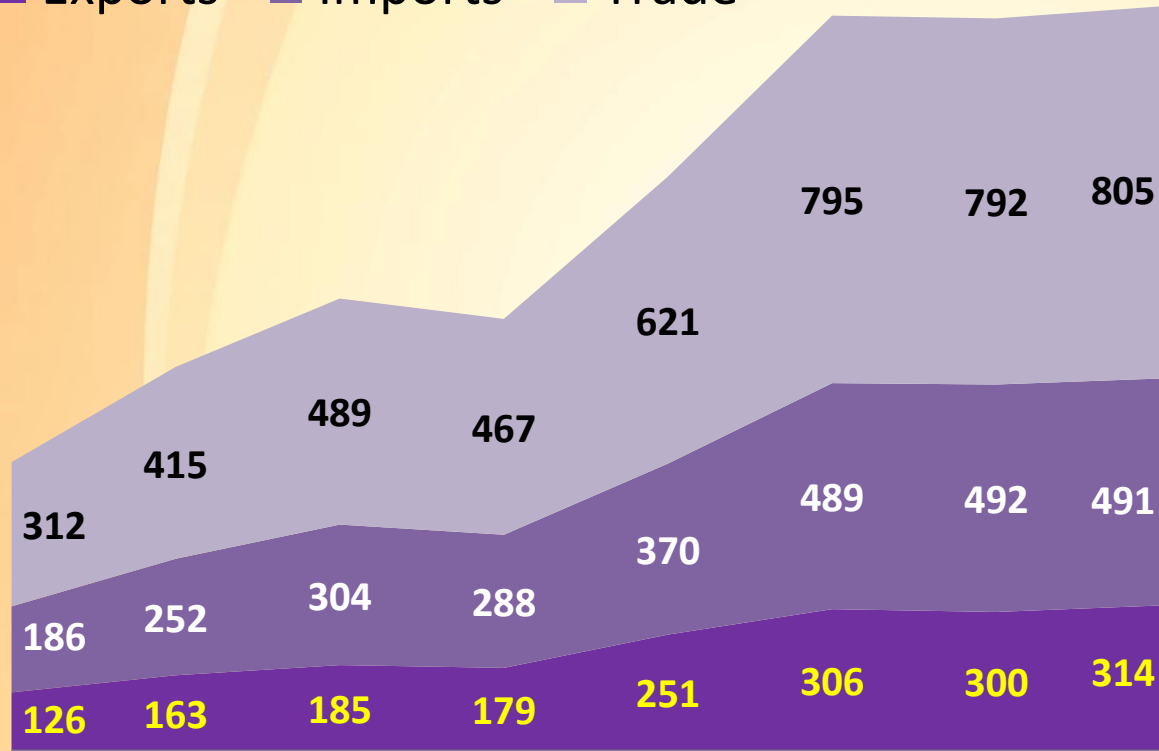
	Millions	2011	2020E	CARG
White goods	CTV	13.6	60	20%
	Refrigerator	5.1	14.3	8%
	Air conditioner	2.6	18	13%
	Washing Machines	2.5	9.1	14%
Transportation	Car	1.7	9.7	18%
	Commercial Vehicles	0.43	5.4	30%
	Two wheelers	8.9	30	66%
Infrastructure	Electricity (Bn Units)	773	1870	13%
	Steel (MT)	55.1	130	11%
	Coal (MT)	540.6	1380	16%
	Cement (MT)	193.5	509	13%
	Airline Passengers	43.2	452	28%
	Mobile subscribers (Additions)	160	5000	24%
Polymers	2013 Consumption in MMT	12.2	20	10%



Large market creates inherent demand for petrochemicals

India's International Trade

■ Exports ■ Imports ■ Trade

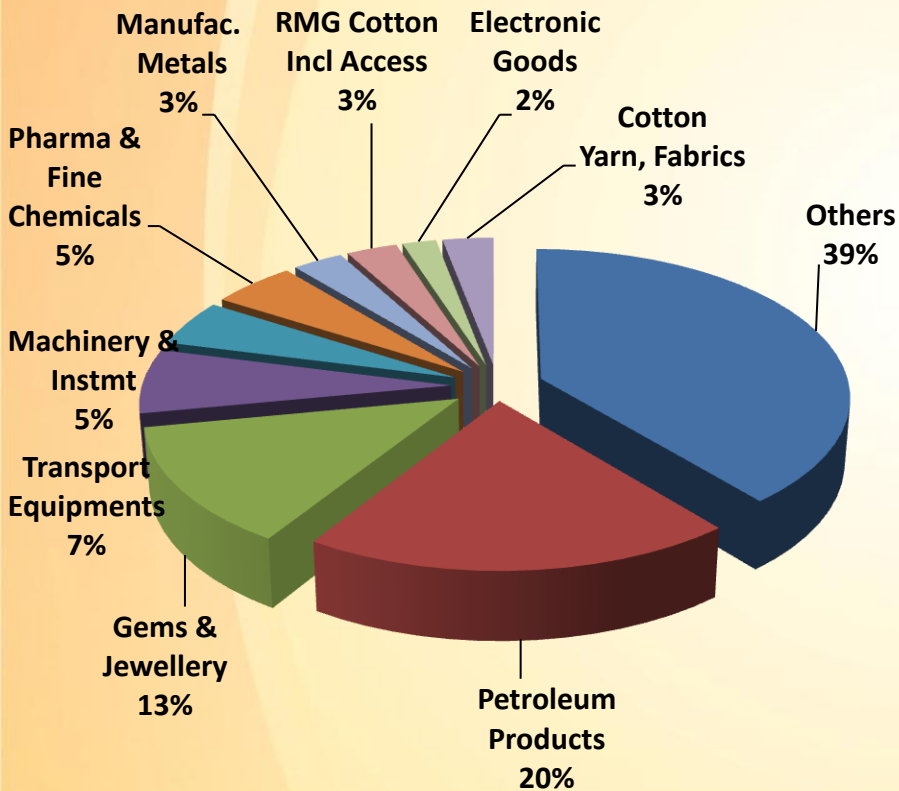


- India's total merchandise trade increased over two-fold from US\$ 312 Bn in 2006/07 to US\$ 805Bn in 2013/14

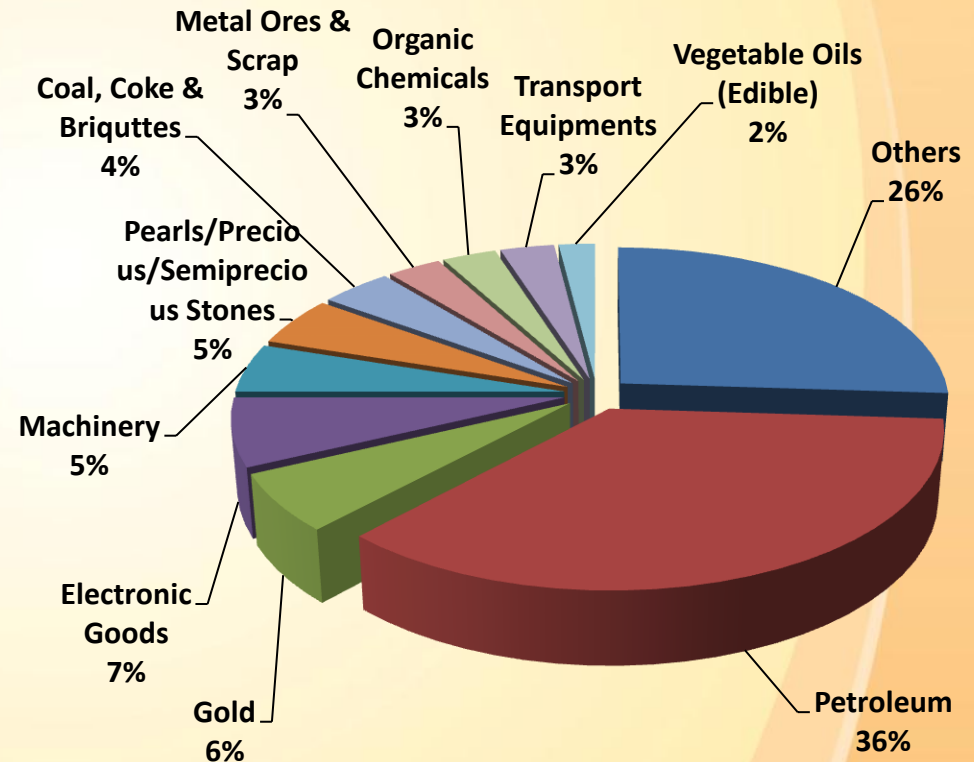
India - the wide open economy

India's Trade Basket

Top Export Items (2013/14, US\$ 314 bn)



Top Import Items (2012/13, US\$ 491 bn)



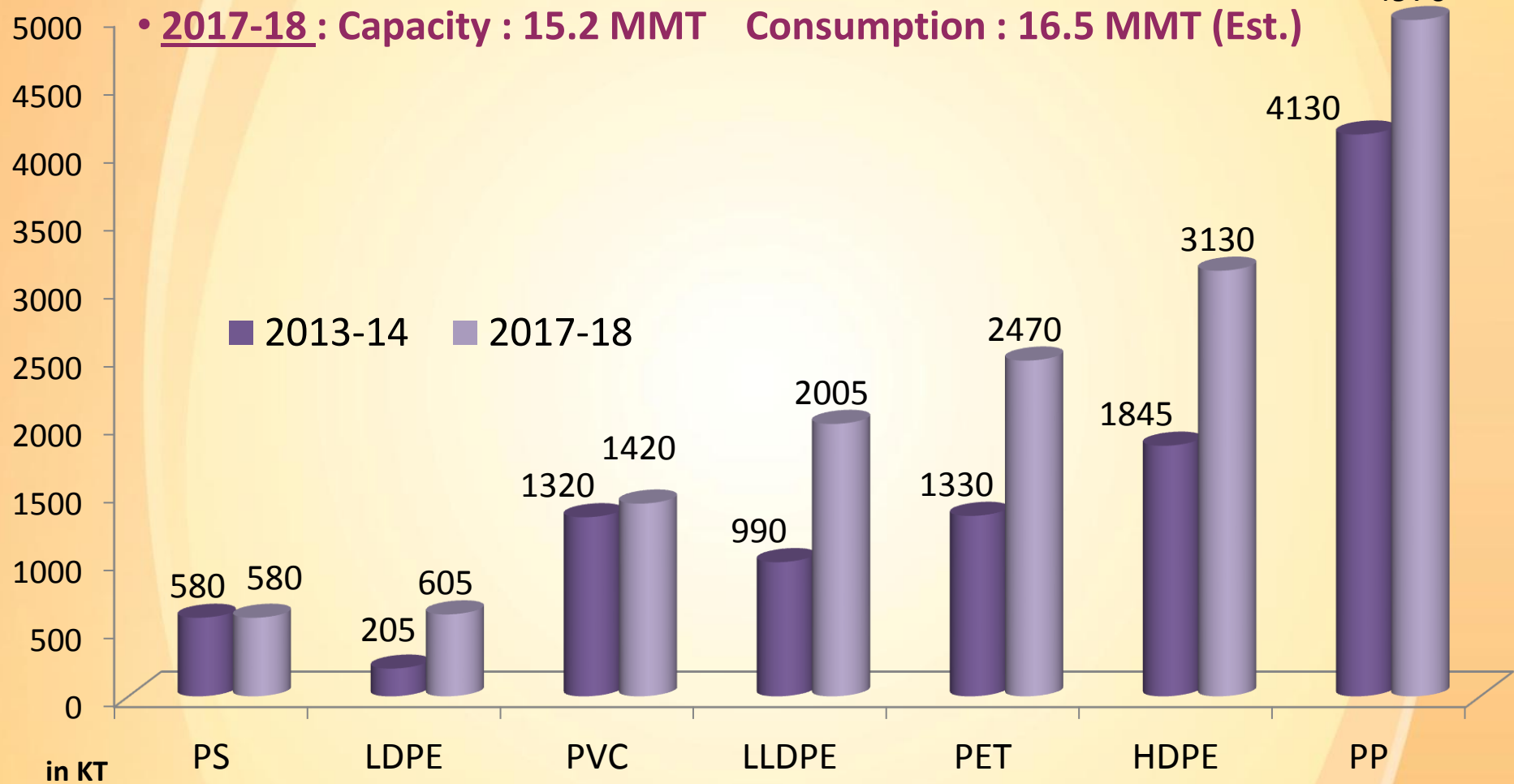
Foreign Direct Investment : 2013/14 – US\$ 28.8 Bn (2012/13 – US\$ 36.8 Bn)



Polymer Manufacturing Capacity

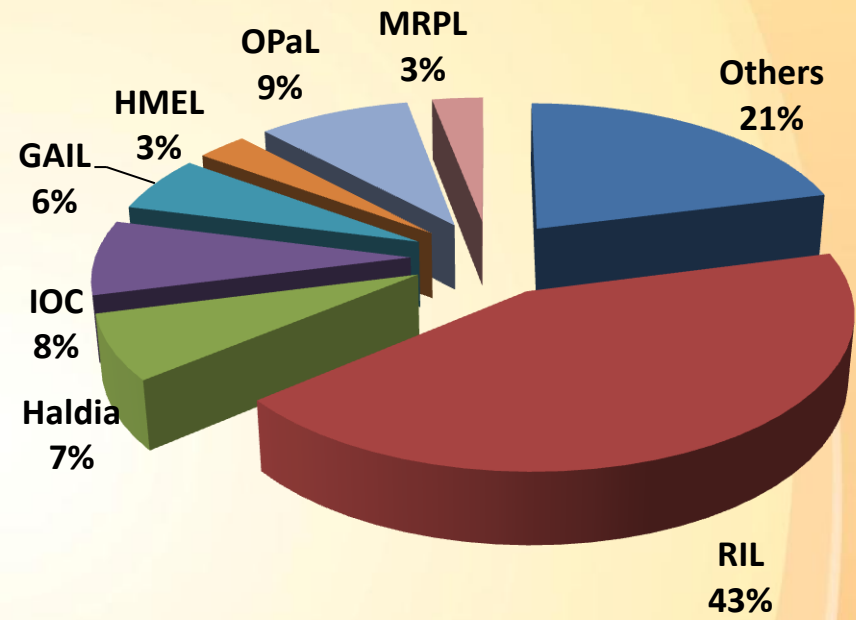
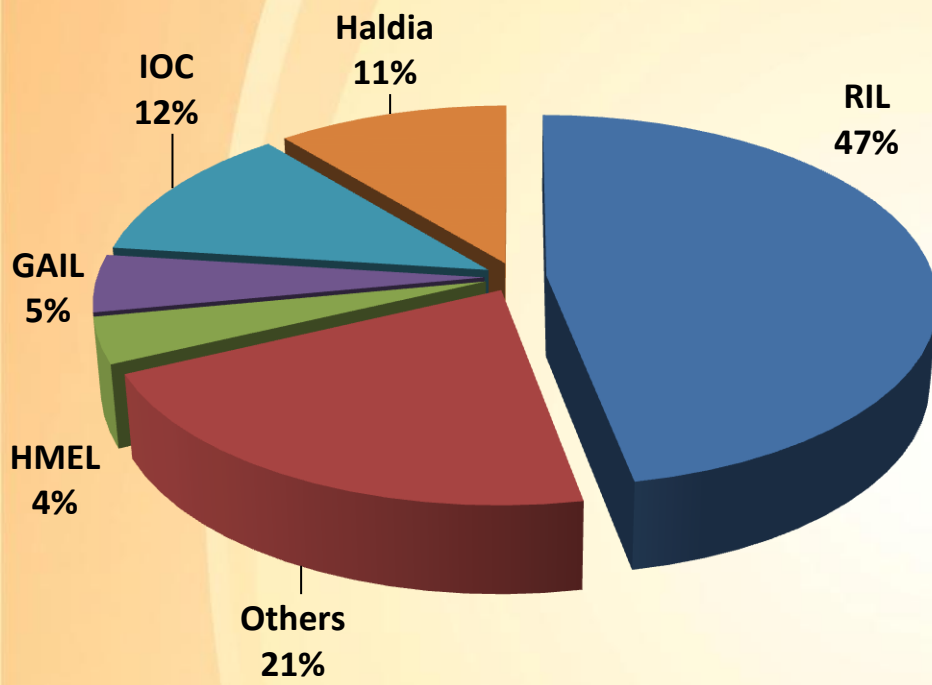
Major Polymers - Manufacturing Capacity

- 2013-14 : Capacity : 10.4 MMT Consumption : 11.34 MMT
- 2017-18 : Capacity : 15.2 MMT Consumption : 16.5 MMT (Est.)



Manufacturing capacity is being continuously augmented to meet increasing demand

Producers of Major Polymers (PE/PP/PVC/PS/PET)



Capacity 2013-14 : 10.4 MMT

Capacity 2017-18 : 15.2 MMT

New capacity addition by 2017/18 : 4.8 MMT

Existing/Future - Manufacturing Capacity

Major players (Thermoplastics)

Company	13-14	% Share	15 - 16	% Share
RIL	4865	47%	6565	43.2%
IOC	1250	12%	1250	8.2%
Haldia	1110	11%	1110	7.3%
GAIL	505	5%	975	6.4%
HMEL	440	4%	440	2.9%
Dhunseri Petrochem	400	4%	400	2.6%
Supreme Petrochem	342	3%	342	2.3%
Finolex	270	3%	270	1.8%
Chemplast Sanmar	250	2.4%	250	1.6%
JBF Industries	150	1.4%	180	1.2%
LG Polymers India	130	1.2%	130	0.9%
Styrolution	105	1.0%	105	0.7%
DCW	90	0.9%	90	0.6%
DSCL	61	0.6%	61	0.4%
OPaL	----	----	1400	9.2%
MRPL	----	----	440	2.9%
BCPL	----	----	280	1.8%
Micropolypet	----	----	220	1.4%
Others	435	4.2%	675	4.4%
Total	10403	100%	15183	100%



Planned Manufacturing Capacity (Thermoplastics)



Speciality Polymers Production

MANUFACTURER	PLASTICS	CAPACITY (Tonnes/ annum)	MAJOR APPLICATIONS
Solvay Specialties	Polyether Sulfone (PES)	1200	Chip Trays, Electricals.
	Polyether Ether Ketone (PEEK)	500	Stock Shapes, E&E, Cables, Gen. Engineering
Cytec/Rallis	Polyether Ketone Ketone (PEKK)	100	CF Composites
Gharda Chemicals	Polyether Ketone (PEK)	100	Stock shape, Cable, Gen. Engineering
	Polyether Ketone Ketone (PEKK)	50	Electronics, Oil Fields, Gen. Engineering
	PolyBenzimidazole (ABPBI)	25	Blends with PEK, Fire Resistant Fiber, High Temp. Membranes

Made in India for the world

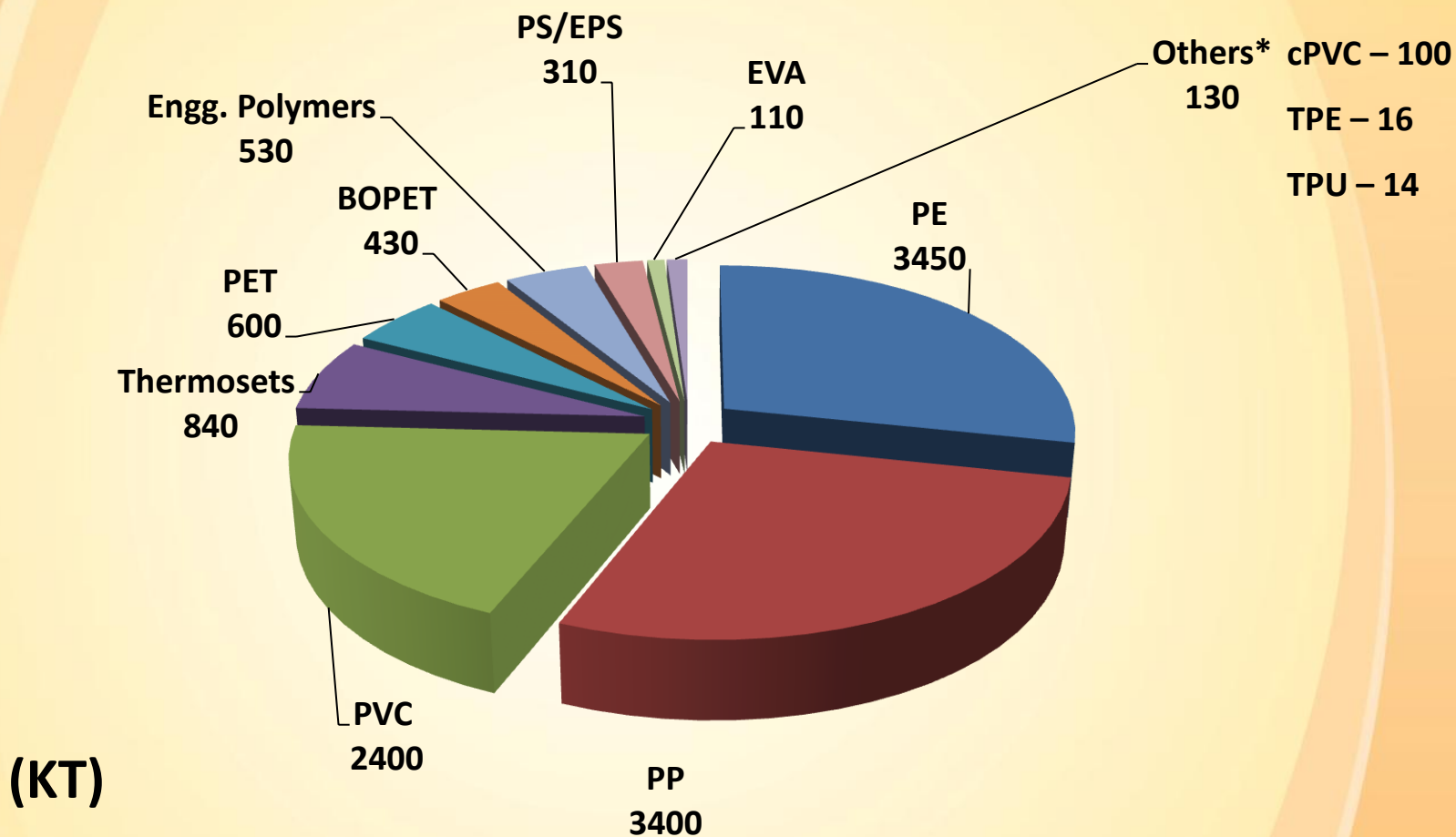


India - Polymer Consumption

Polymer Processing Industry : An Overview

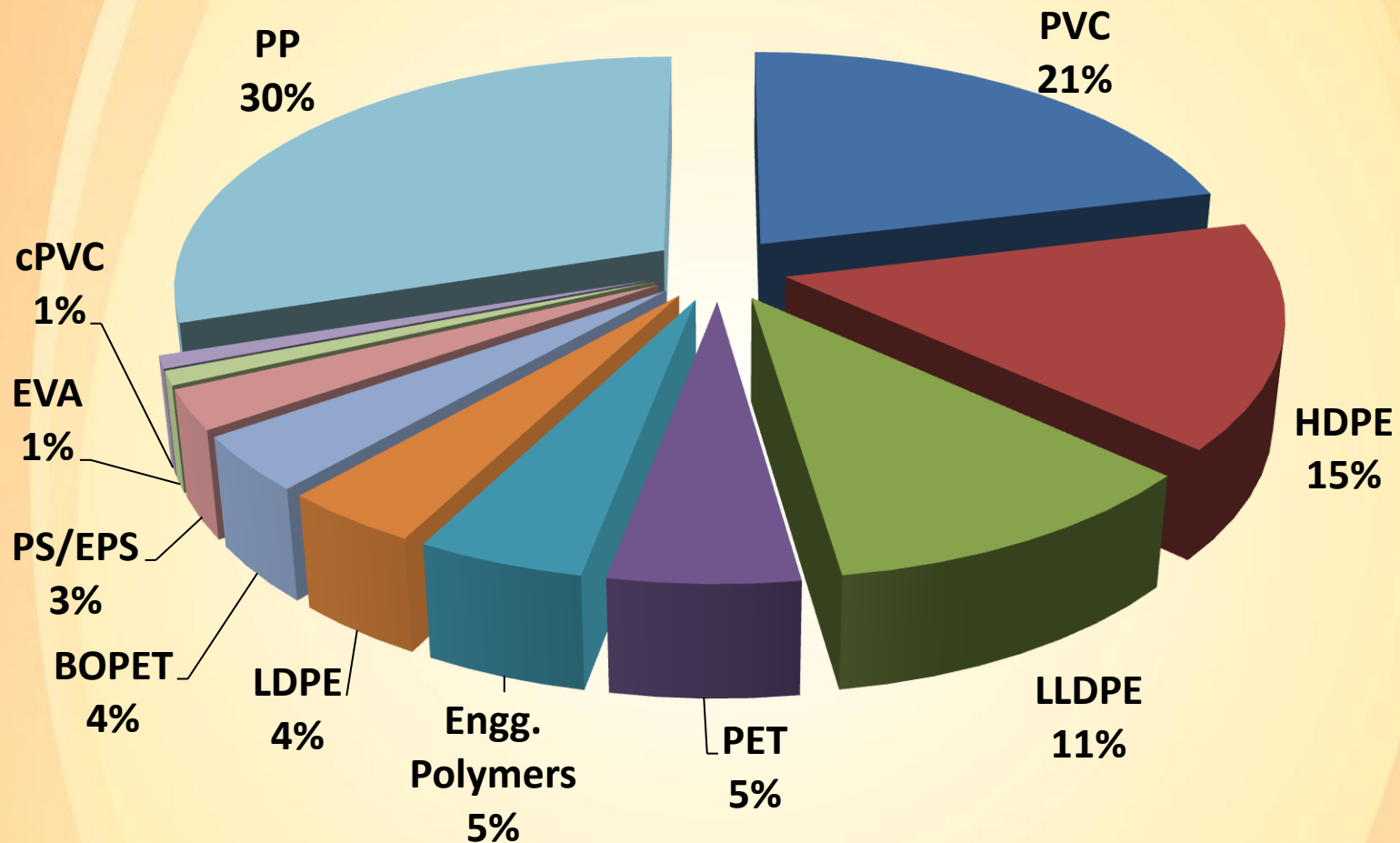
India Per Capita Consumption (Virgin Polymer)	9.7 kg (USA -109Kg, China 45 Kg, Brazil - 32 Kg)
India per Capita Consumption (Recycled Material)	3.3 Kg
Per Capita Consumption in 13-14 (Virgin + Recycled)	13 kg
Virgin Polymer consumption in 13-14	12.2 MMT
No of Processing units	about 30,000
No of processing Machines	~ 119,350
Processing Capacity	33 MMT
Processing Capacity CARG	11 % last 5 years
No. of plastics machinery manufacturing units	~ 200
Investment in Machinery	~ US \$ 5 Billion
Investment required for next 5 yrs	~ US \$ 10Bn (Projected.)

Total Polymer Consumption : 2013-14 (Thermoplastics + Thermosets)



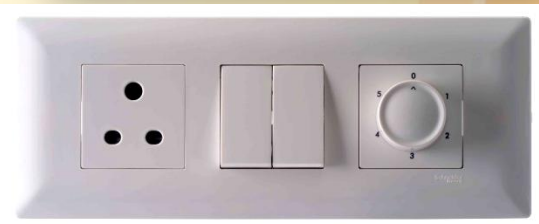
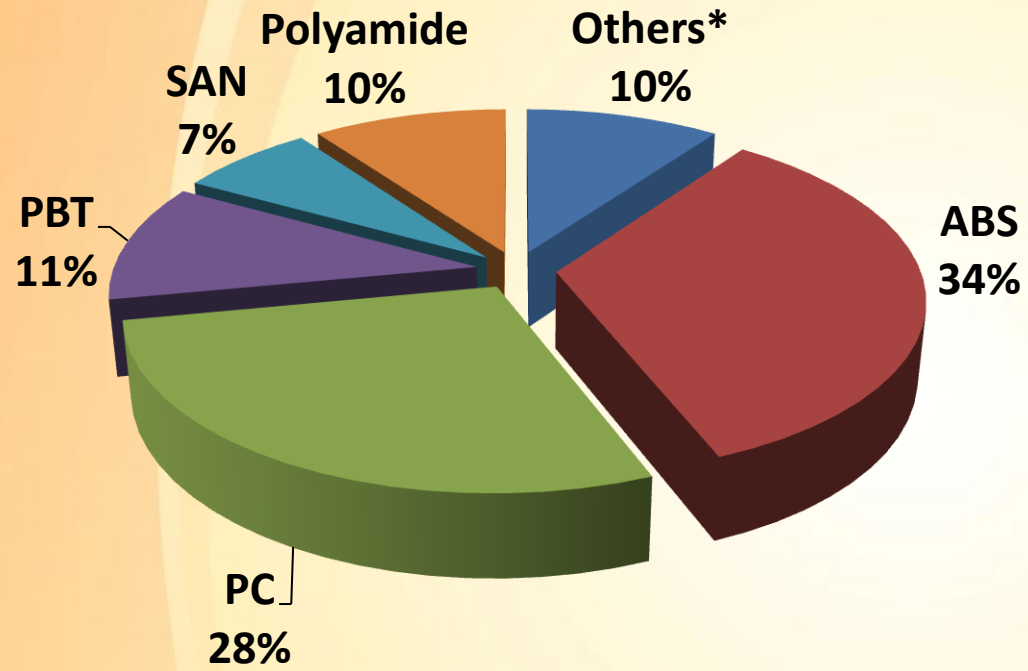
Demand → 12.2 MMT (2013/14) → 17.6 MMT (2017/18) : ~ 11% CARG

Thermoplastic Polymer Consumption - 2013-14



Demand → 11.36 MMT (2013/14) → 16.5 MMT (2017/18) :~ 11% CARG

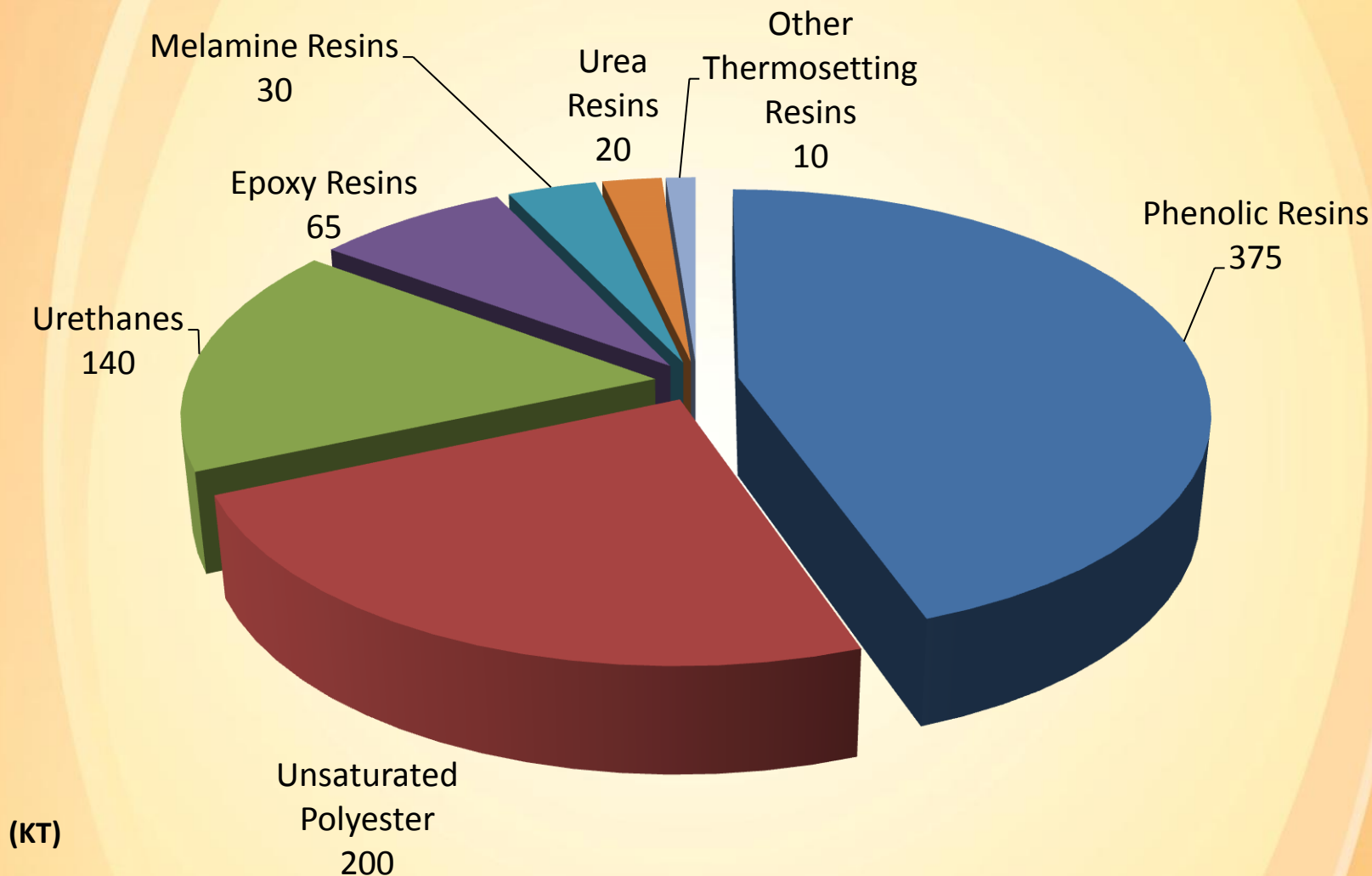
Engineering Polymers Consumption – 2013-14



* PMMA , POM, PPO/PPS, UHMWPE, PEEK, FP, LCP, etc

Demand → 530 KT (2013/14) → 740 KT (2017/18):~ 10 % CARG

Thermosetting Polymer Consumption - 2013-14

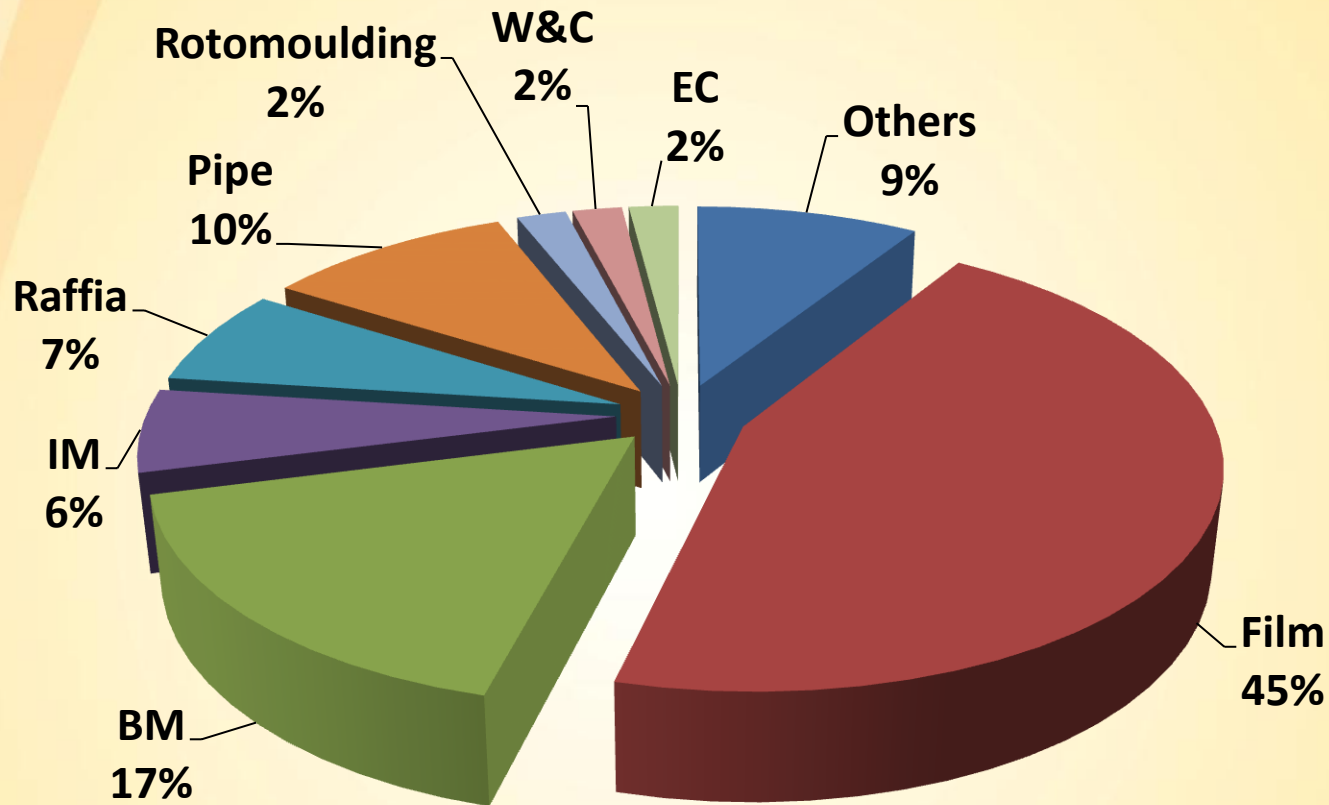


Demand → 840 KT (2013/14) → 1100 KT (2017/18): ~ 8 % CARG



Sector wise Polymer Consumption

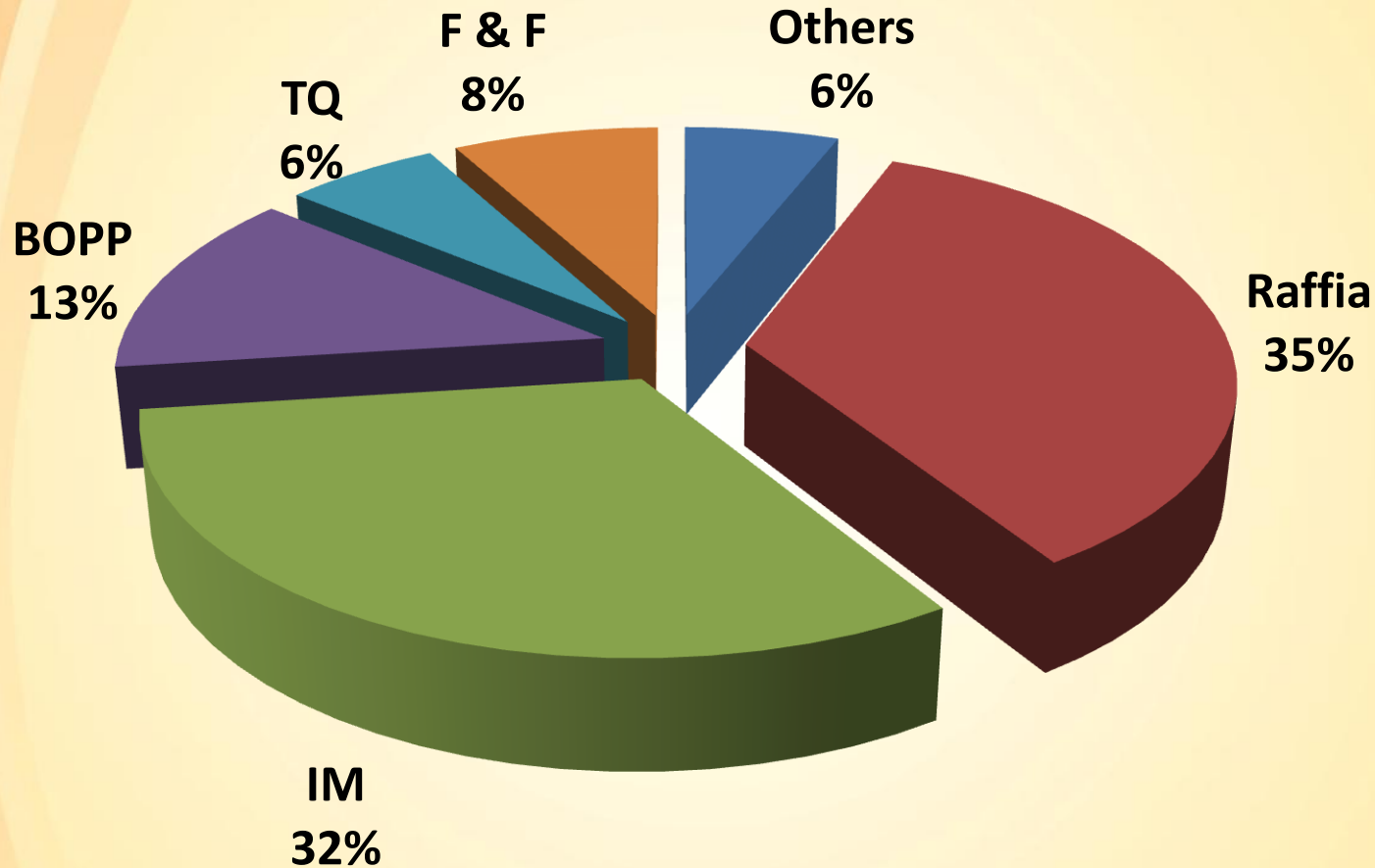
PE Sector wise Consumption - 2013-14



Demand - 3.45 MMT (2013/14) - 4.90 MMT(2017/18) : ~ 10% CARG

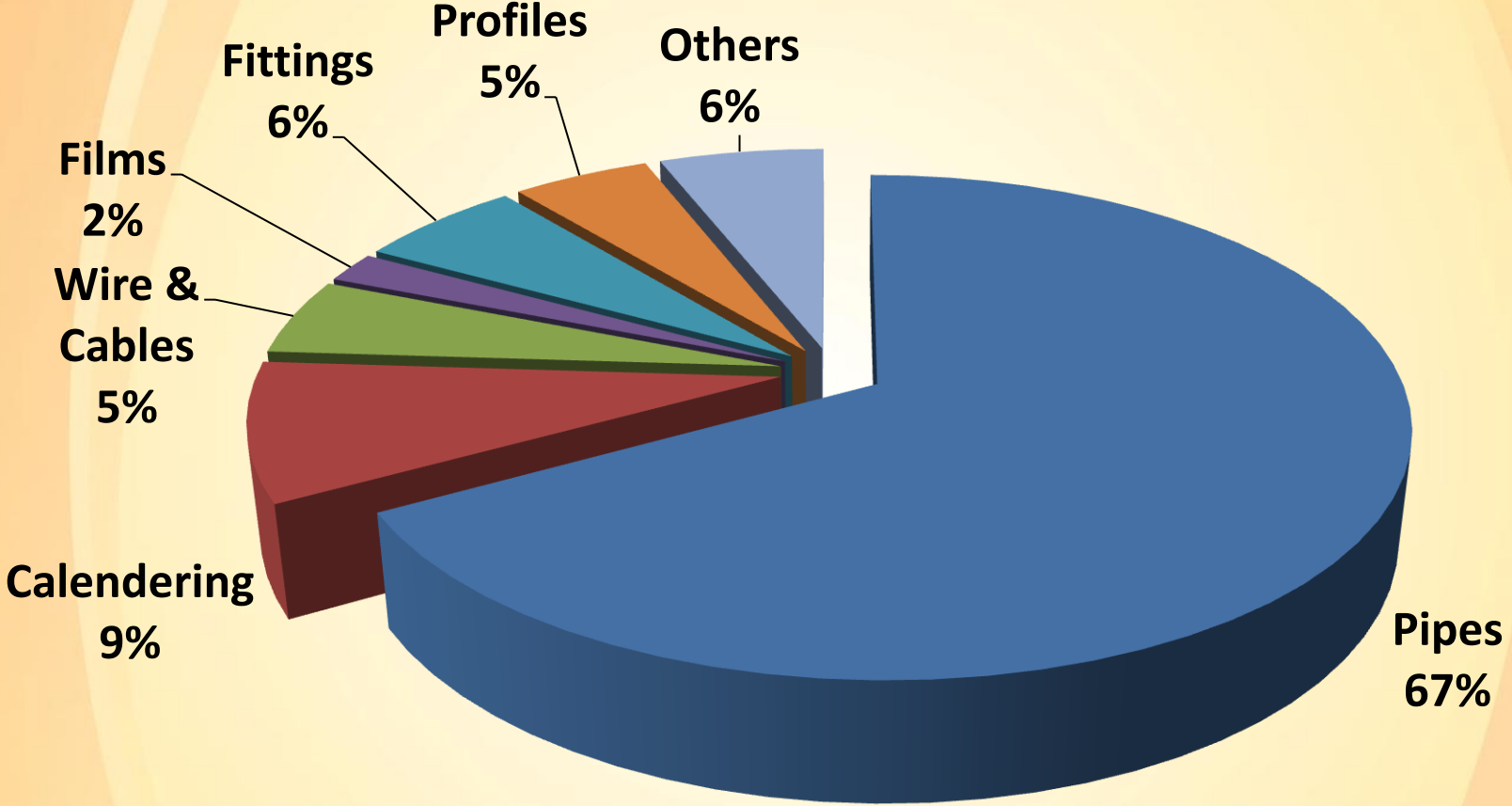
India to be top ten packaging consumer by 2017 - demand set to reach \$24 Bn by 2017

PP Sector wise Consumption - 2013-14



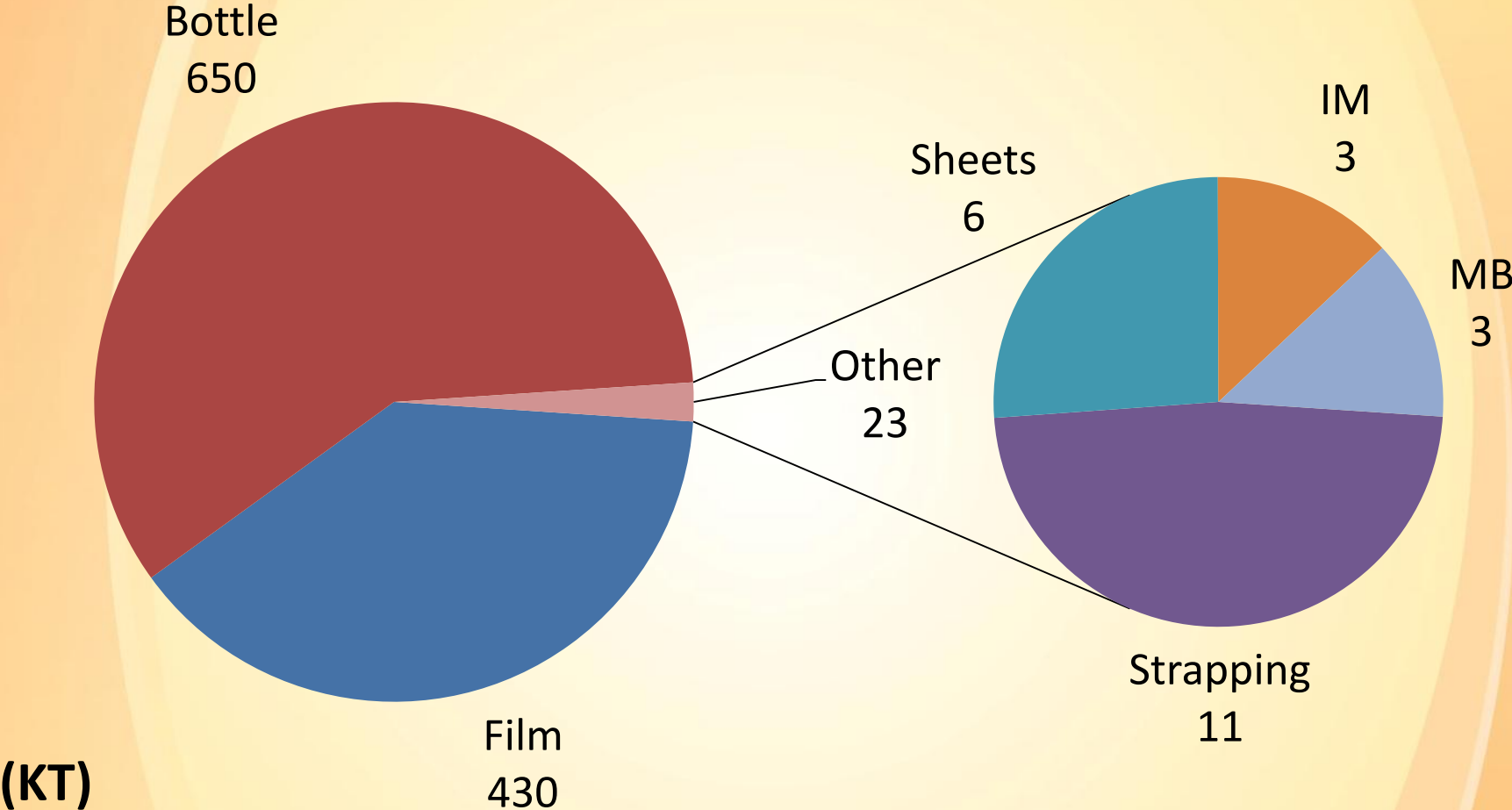
Demand → 3.4 MMT (2013/14) → 4.89 MMT (2017/18): ~ 11% CARG

PVC Sector wise Consumption - 2013-14



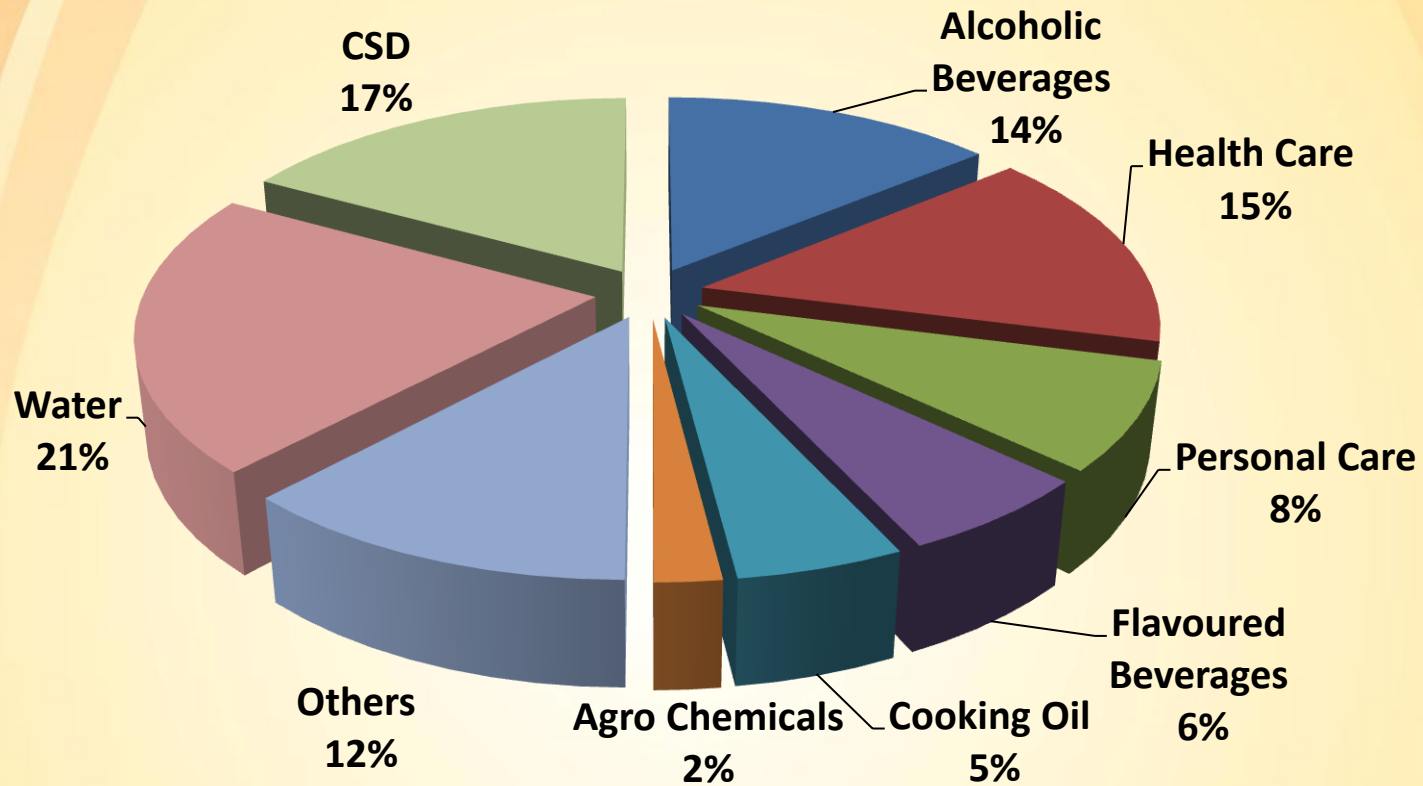
Demand → 2.4 MMT (2013/14) → 3.33 MMT (2017/18):~ 9% CARG

PET Sector wise Consumption - 2013-14



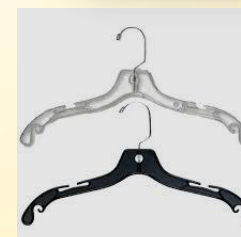
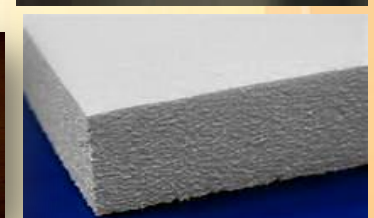
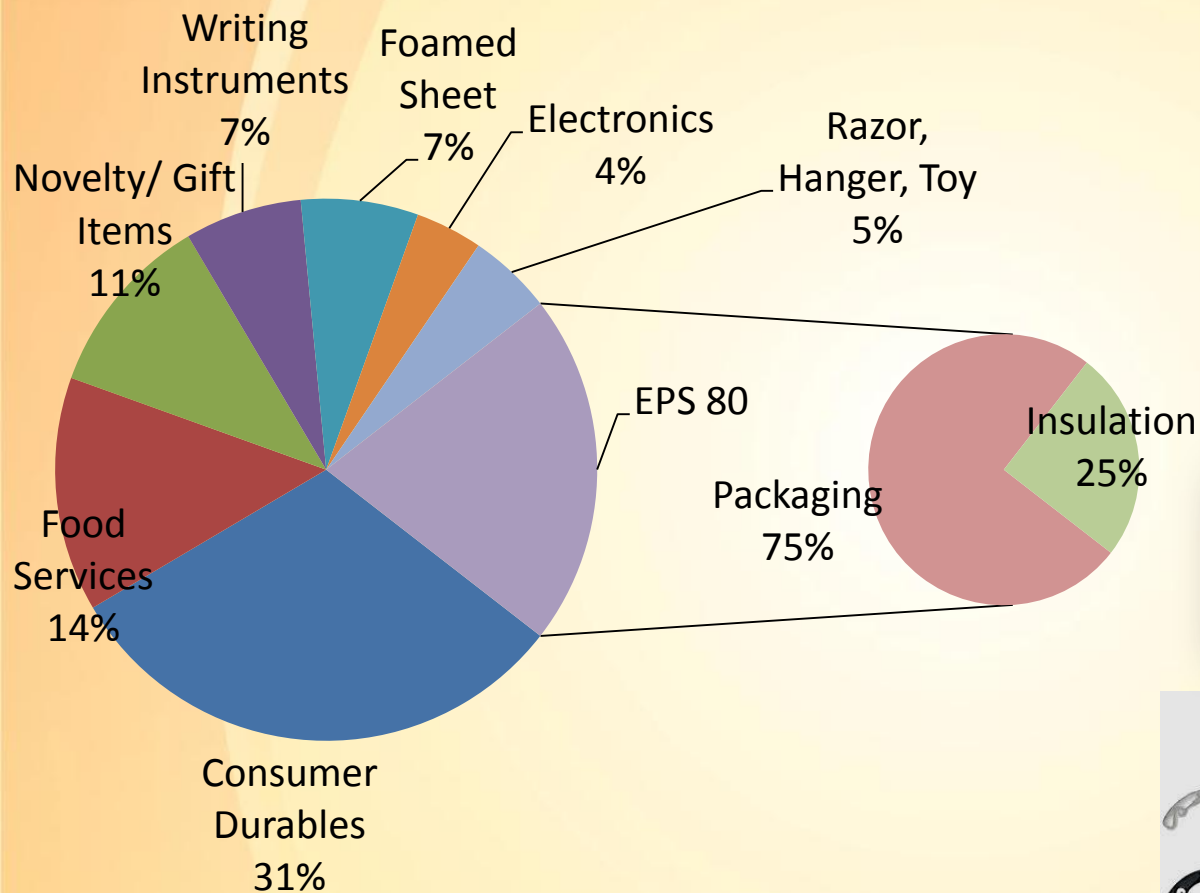
Demand -1100 KT (2013/14) - 1900 KT (2017/18) : ~ 18% CARG
Tremendous growth potential

PET (Bottle Grade) Sector wise Consumption



Demand → 650 KT (2013/14) → 1200 KT (2017/18) : ~ 21 % CARG
Tremendous Growth Potential for Indian Market

PS/EPS Sector wise Consumption - 2013-14



Demand → 310 KT (2013/14) → 385 KT (2017/18):~ 6 % CARG

Rotomoulding – Market Snapshot

- Market size - 200 KT (120 KT virgin + 80 KT recycled)
- Around 75 % of virgin polymer consumed for tanks, i.e., 90KT.
- Est. Consumption of reprocessed material in Rotomoulding ~ 80 KT.
- Overhead tank : Loft tank ratio - 85:15
- ~80% of tanks demand is for < 2000 ltrs

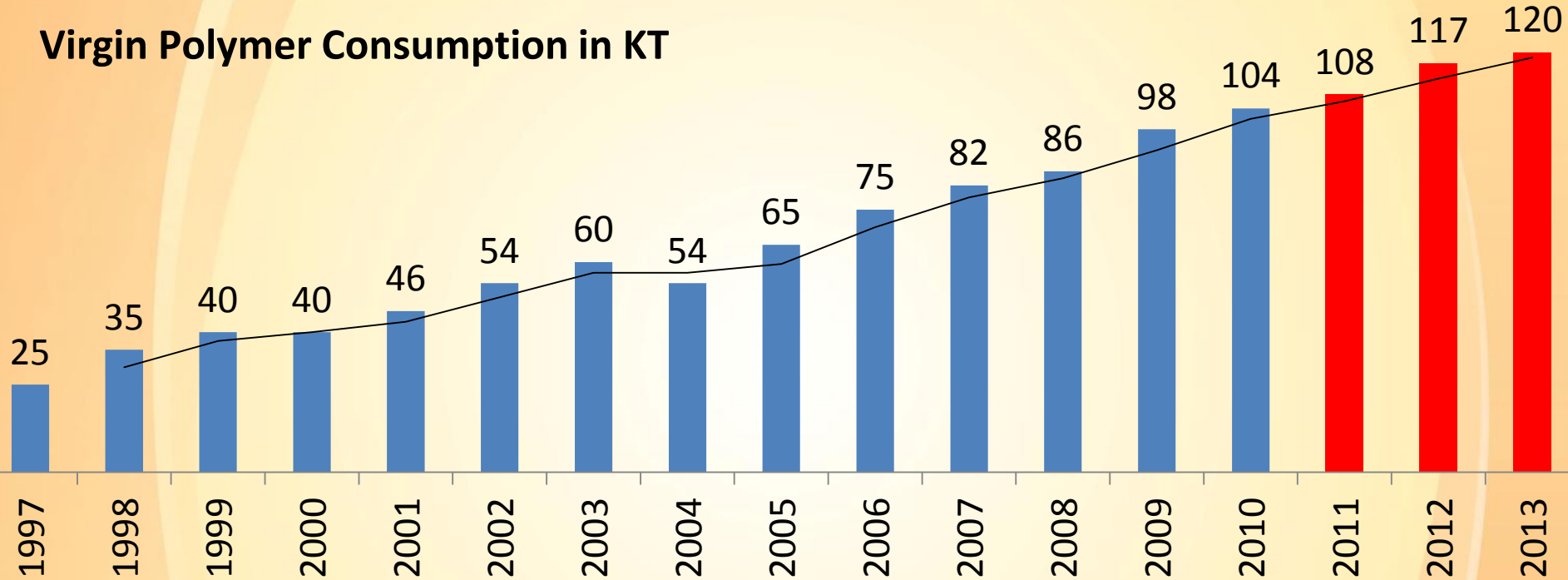


World's largest rotomoulded water tank market

Rotomoulding – Consumption

2013-14 Consumption : 120 KT (virgin) + 80 KT(recycled)

Virgin Polymer Consumption in KT

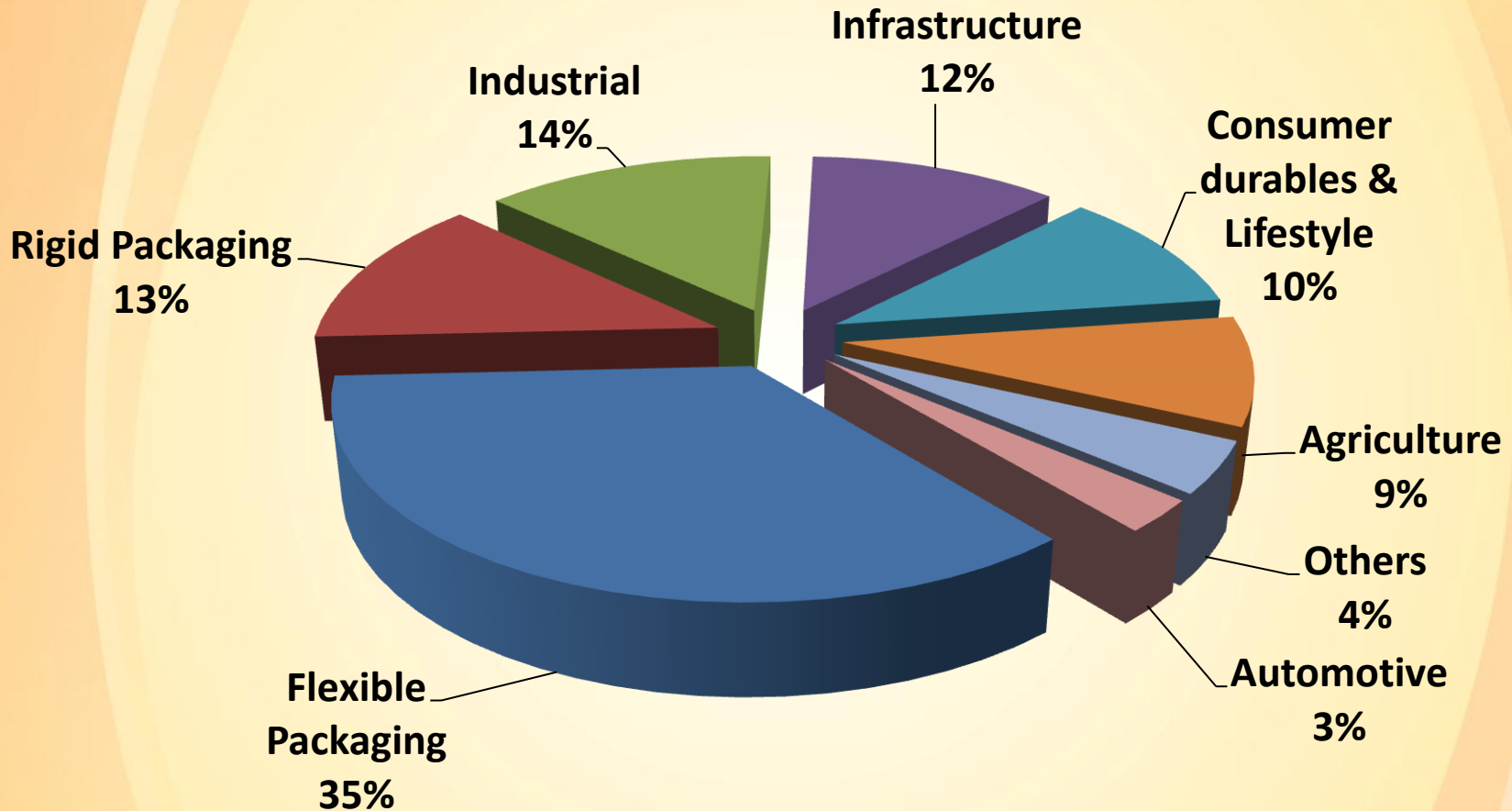


Growth Opportunities:

- 1) Water management
- 3) Infrastructure

- 2) Agriculture sector
- 4) Traffic aids

Polymer Applications 2013-14



Demand → 11.36 MMT (2013/14) → 16.5 MMT (2017/18): ~11 % CARG



Masterbatch

Masterbatch – Current Scenario

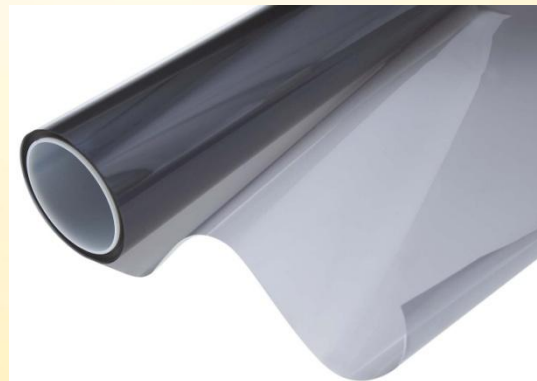
Masterbatch	Demand (KT)	
	2013-14	2017-18
White/Black/Colour + Additive	265	420
Filler Masterbatch	540	840
Total	805	1260



Masterbatch manufacturing units in India - about 180 nos.

Masterbatch – Growth drivers

- Cling, anti-bacterial, anti-static, anti-fog, foaming agents and high speed extruded films
- Focus on quality aspects
- Surface printed film for packaging of milk, oil, etc
- Black Masterbatch
- Raffia





Additives

Additives Demand 2013/14 – 2017/18

ADDITIVES	2013-14	2017-18
Anti Oxidants		
Phenolic AO	4120	6290
Phosphite AO	4840	7400
Trioesters	360	550
UV - Absorbers	1540	2360
	10860	16600
Flame Retardants		
Brominated	660	840
Phosphite	1570	2010
Antimony Oxide	1650	2100
ATH	9890	12580
Others	1050	1340
	14820	18870

(MT)

Additives Demand 2013/14 – 2017/18

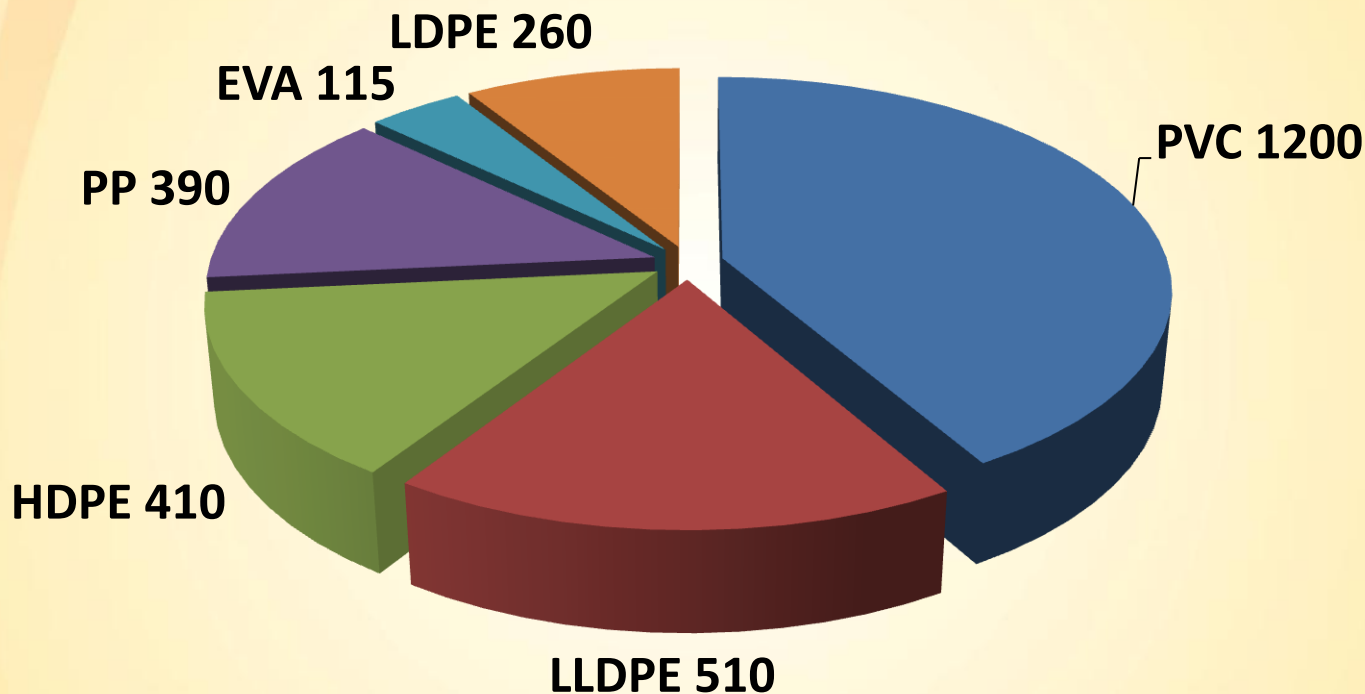
ADDITIVES	2013-14	2017-18
Stabilizers		
PVC Heat Stabilisers	58700	80460
Modifiers		
Impact Modifiers	7300	10050
Processing Aids	5820	7980
	13120	18030
Plastisizers		
Primary Plastisizers	231750	306110
Epoxy Plastisizers	30900	40810
Chlorinated Paraffins	128750	170060
	391400	516980

(MT)



Imports/Exports

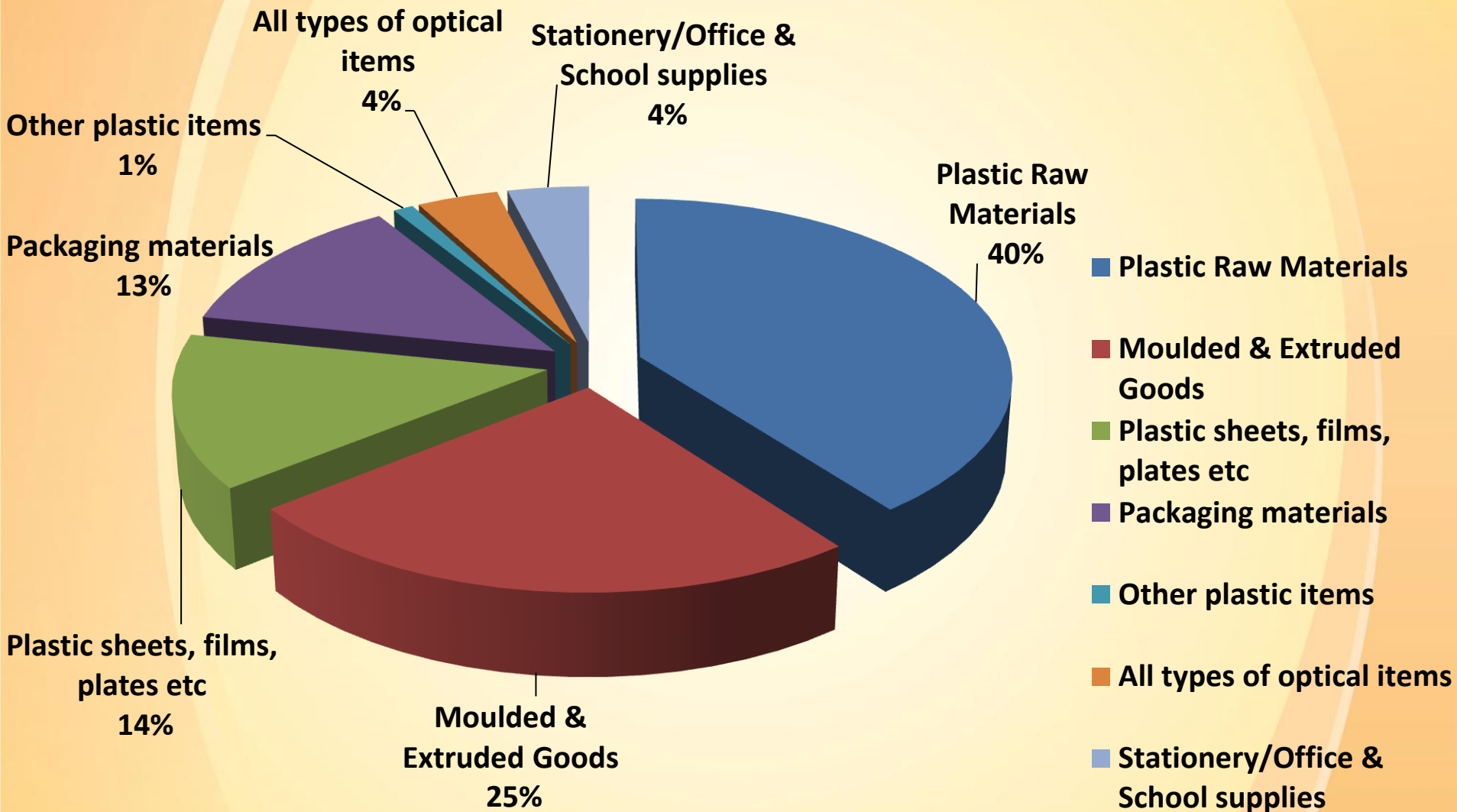
Polymer Imports – 2013/14



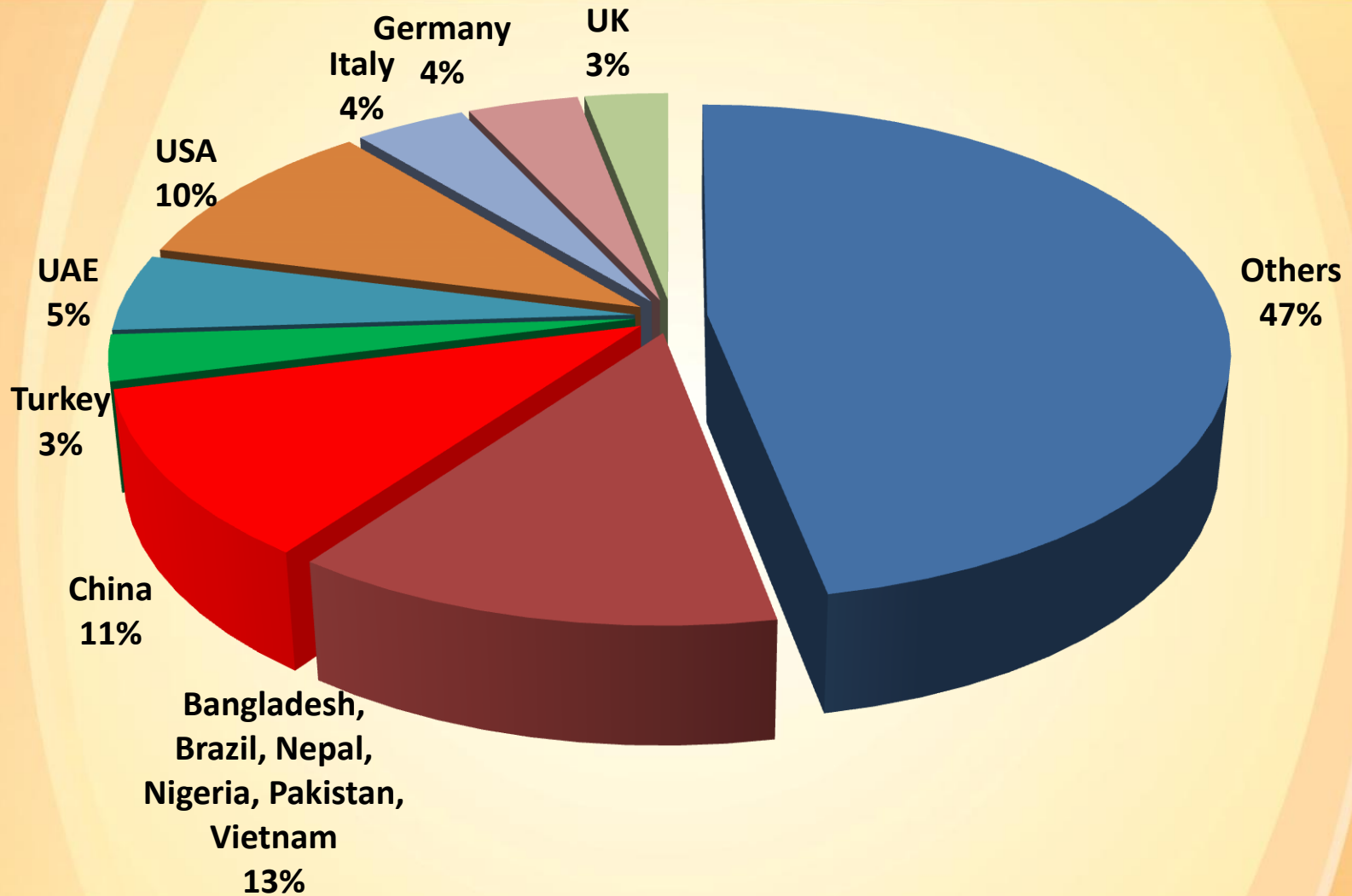
(KT)

2013-14 : Polymer Imports : 2.88 MMT

Exports – 2013/14



Country wise Exports – 2013/14



Exports of plastic raw materials and processed goods - USD 7.9 Bn

Product Imports – 2013/14

- Moulded & Extruded goods
- Polyester film
- Woven sacks/Fabrics/Bags
- Writing instruments
- Floor coverings
- PVC fabricated goods
- PVC leather cloth
- Ropes/Twines/Yarn/Bristles
- Fish nets/Fishing line
- PVC rigid/flexible pipes/fitting
- PVC sheeting/film
- Laminates
- Poly-lined jute goods
- Moulded & Soft luggage items
- Lenses
- GRP/FRP products
- Electrical accessories
- Bangles/Imitation jewelry
- Optical goods
- Polythene pipes
- Cine X-Ray films
- Toys/Dolls/Games



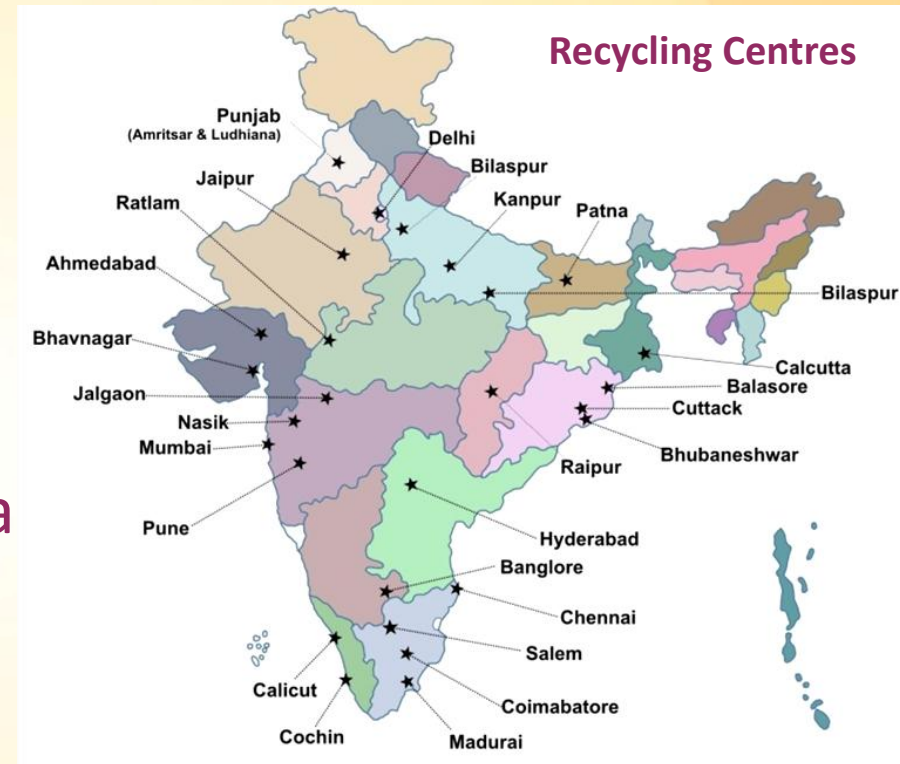
Plastics Recycling

Plastics Recycling

- Last industry study on recycling published in 2008
- Number of organised recycling units: 3500
- Number of unorganised recycling units: 4000
- Major types of plastics recycled: PET, HDPE, PVC, LDPE/LLDPE, PP, PS & others like ABS, PMMA etc.
- Manpower directly involved in plastics recycling: around 6, 00,000
- Manpower indirectly involved in plastics recycling: around 10, 00,000
- Quantum of plastics recycled per annum: 4 MMT. Estimation based on following facts :
 - Almost 100% of rigid packaging products is recycled except EPS
 - 70% of PET bottles are recycled
 - Large imports of plastic scrap & waste pairings
 - Waste generated by plastic industry, industrial plastic waste
 - Recycling including plastics from household, furniture etc applications
 - Plastic products going into municipal solid waste

Plastics Recycling Clusters

- Dhoraji, Gujarat
- Daman
- Vapi, Gujarat
- Malegaon (Dyana) & Solapur in Maharashtra
- Dharavi and Bhandup in Mumbai
- Indore, Madhya Pradesh
- Delhi, NCR



Estimated quantity of recycled plastics → 4 MMT

Recycling Categories

- **Primary recycling** – conversion of waste plastics into products having performance level comparable to that of original products made from virgin plastics
- **Secondary recycling** – conversion of waste plastics into products having less demanding performance requirements than the original material
- **Tertiary recycling** – the process of producing chemicals / fuels / similar products from waste plastics
- **Quaternary recycling** – the process of recovering energy from waste plastics by incineration.

Estimated quantity of recycled plastics → 4 MMT

Machinery Manufacturing Industry

Present Scenario

- No. of plastic machinery manufacturing units: ~ 200
- Domestic market: ~ US \$550 Million p.a.
- Machines installed till Mar.2014:- 119,350
- Installed processing capacity: 32.8 MMT
- Employment: 1.2 million (direct+indirect)
- Processing capacity CARG: 11 % last 5 years

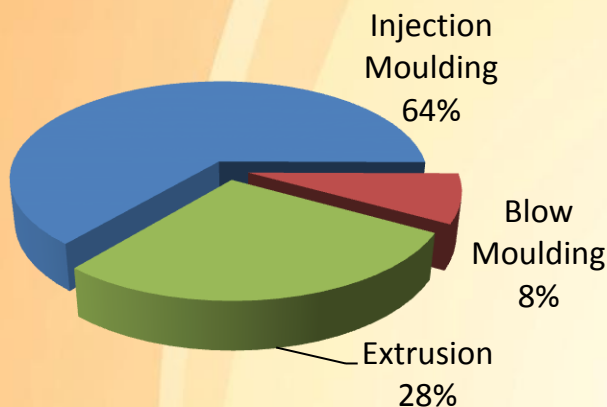


Machinery Additions – Up to March 2014

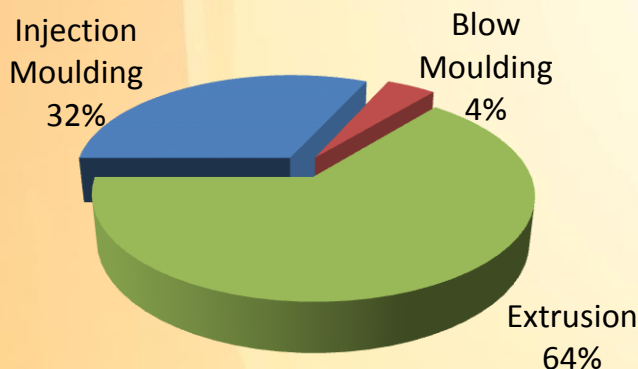
Process	Nos./KTA	08-09	09-10	10-11	11-12	12-13	13-14	Up to 13-14
Extrusion	Machines Added (Nos.)	1714	1816	1902	1620	1600	1490	33110
	Installed Capacity (KTA)	1531	1754	1901	1549	1496	1415	21115
Injection Moulding	Machines Added (Nos.)	3446	4236	5667	5942	5248	4560	76800
	Installed Capacity (KTA)	615	752	1101	1102	980	900	10340
Blow Moulding	Machines Added (Nos.)	387	430	570	536	450	450	9460
	Installed Capacity (KTA)	66	86	131	124	107	110	1400
Total	Machines Added (Nos.)	5547	6482	8139	8098	7298	6500	119370
	Installed Capacity (KTA)	2213	2592	3133	2775	2584	2425	32855

Sector wise Processing Industry – 2013/14

Total No. of Machines



Total Installed Capacity (KT)



	No. of Machines Installed	Installed Capacity (KT)
Injection Moulding	76810	10350
Blow Moulding	9450	1410
Extrusion Total	33090	21115
Monolayer Film	9812	1740
Multilayer	1351	1125
BOPP	35	645
PPTQ Film	3089	690
Raffia	1843	2885
PO Pipes	1461	1675
RPVC Pipe	5445	5775
Others	10055	6580
Total	119350	32875

(Excludes mortality)

Installed capacity being ~ double the quantity processed!

Plastics Machinery Demand & Growth Projections

Description	2006-07	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
IMM	2,899	3,139	3,446	4,236	5,667	5,942	5,248	4,560
Extrusion	1,273	1,645	1,714	1,816	1,902	1,620	1,600	1,490
BMM	336	326	387	430	570	536	450	450
Total	4,508	5,110	5,547	6,482	8,139	8,098	7,298	6,500

No of Machines

Description	2016-17	2017-18	2022-23	2023-24	CAGR
IMM	6,450	7,250	13,000	14,500	12.3%
Extrusion	1,975	2,200	3,600	3,950	10.2%
BMM	600	660	1,140	1,250	10.8%
Total	9,025	10,110	17,740	19,700	11.7%

Projection for 2017-18 : 11.7%
IMM: 12.3 %, Extrusion: 10.2%, BMM: 10.8%

Injection Moulding Machinery Capacity Addition

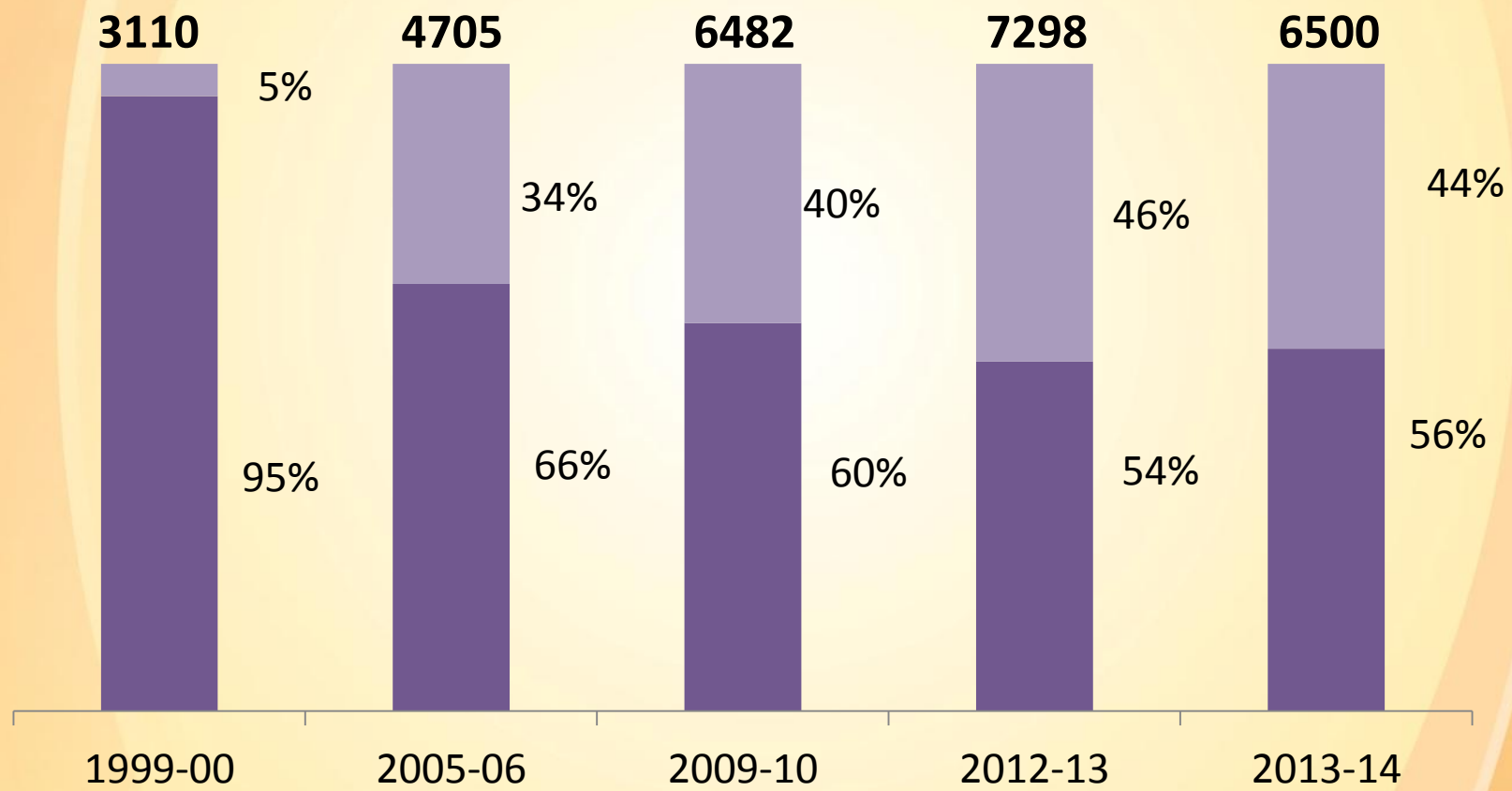
Tonnage Range	Sales 03-04	Sales 07-08	Sales 12-13	Sales 13-14	Sales 16-17
	Nos.	Nos.	Nos.	Nos.	Nos.
Up to 110T	1,156	1,566	2,196	1,908	2,550
125-200T	405	898	1,790	1,560	2,200
220-275T	75	205	390	340	500
350-450T	96	275	515	445	700
500-910T	69	167	305	265	450
> 910T	10	28	50	42	50
Total	1,811	3,139	5,248	4,560	6,450

Projection for 2017-18 : 12.3 % CAGR

Plastic Machinery : Growing share of Imports

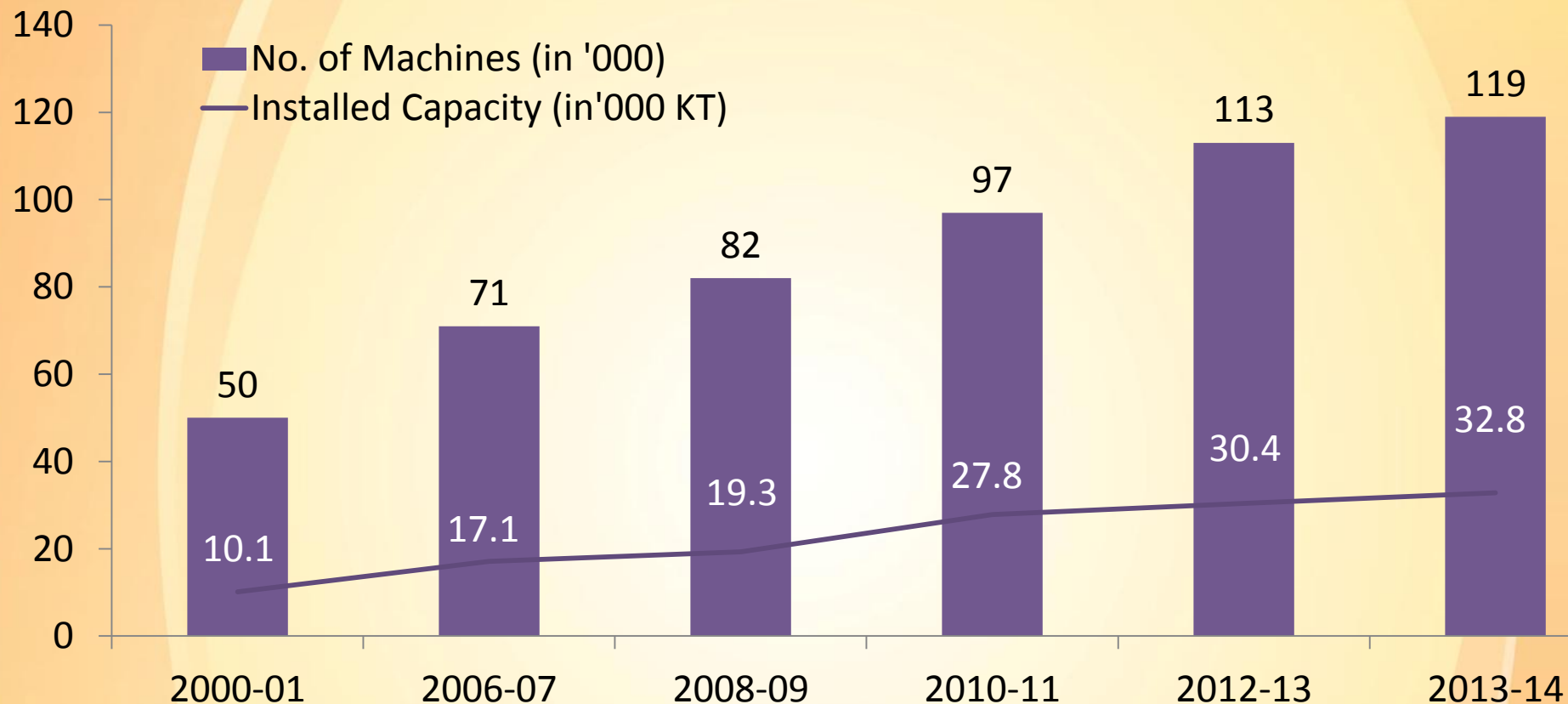
Total Machines Added (2002-03 to 2013-14) : 8.7% CARG

■ Imported ■ Domestic



Growth in domestic machine sale : 5% ; imports : 23%

Industry Growth : 2000-01 to 2013-14



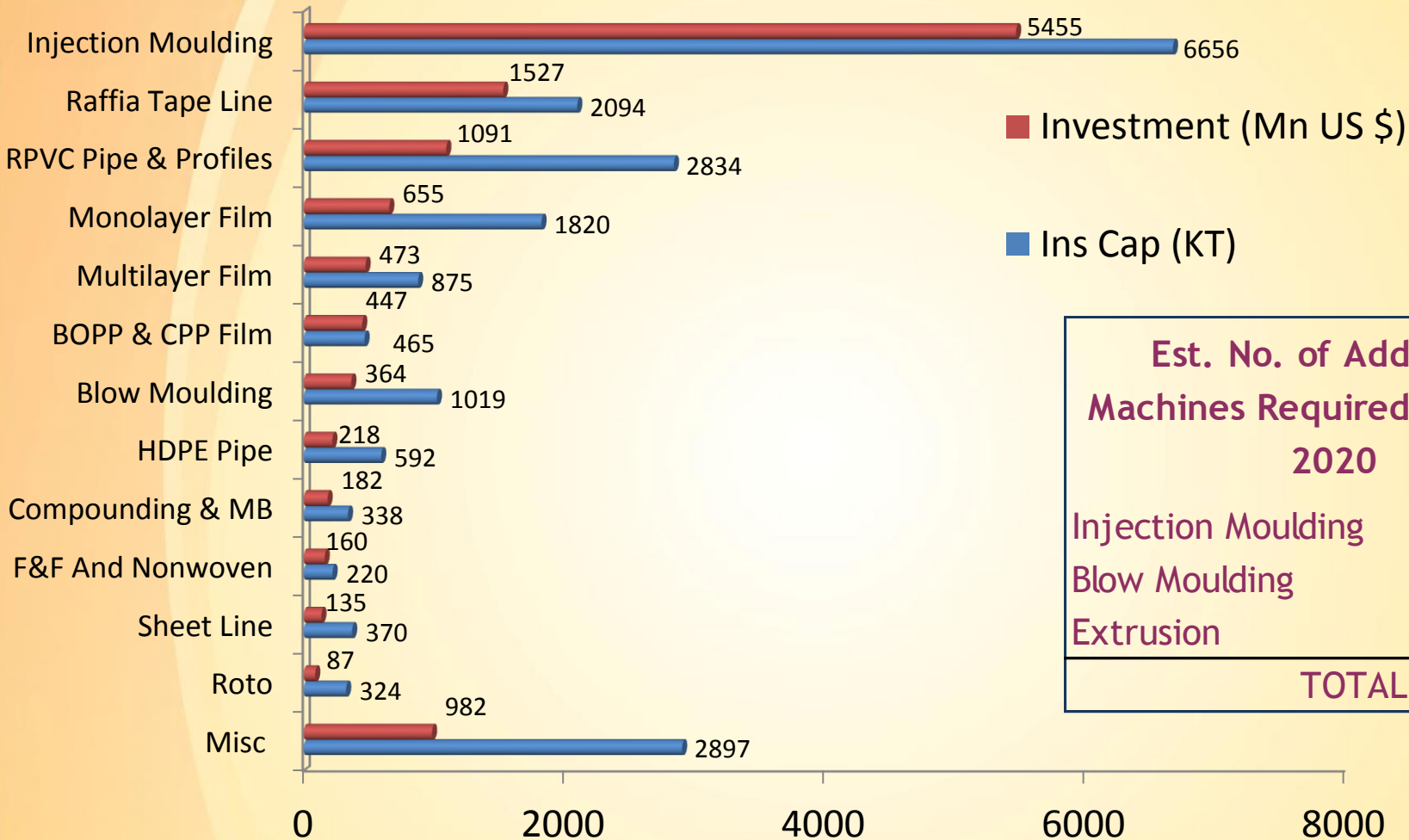
CARG%

- 1. No. of Machines: ~7%
- 2. Polymer Consumption: ~10%
- 3. Installed Capacity: ~10%

Indian technology competes Globally

- Compounding Lines
- Tape Lines & looms
- Multilayer Film plants
- Lamination Plants
- Pipe extrusion lines
- Injection Moulding Machines
- Rotomoulding Machines
- Blow moulding Machines
- Thermoforming Machines
- Thermosetting Presses
- Compression Presses
- Auxiliary equipment

Opportunities by 2020.....



Est. No. of Additional Machines Required by 2019-2020	
Injection Moulding	42,000
Blow Moulding	13,000
Extrusion	4,000
TOTAL	59,000

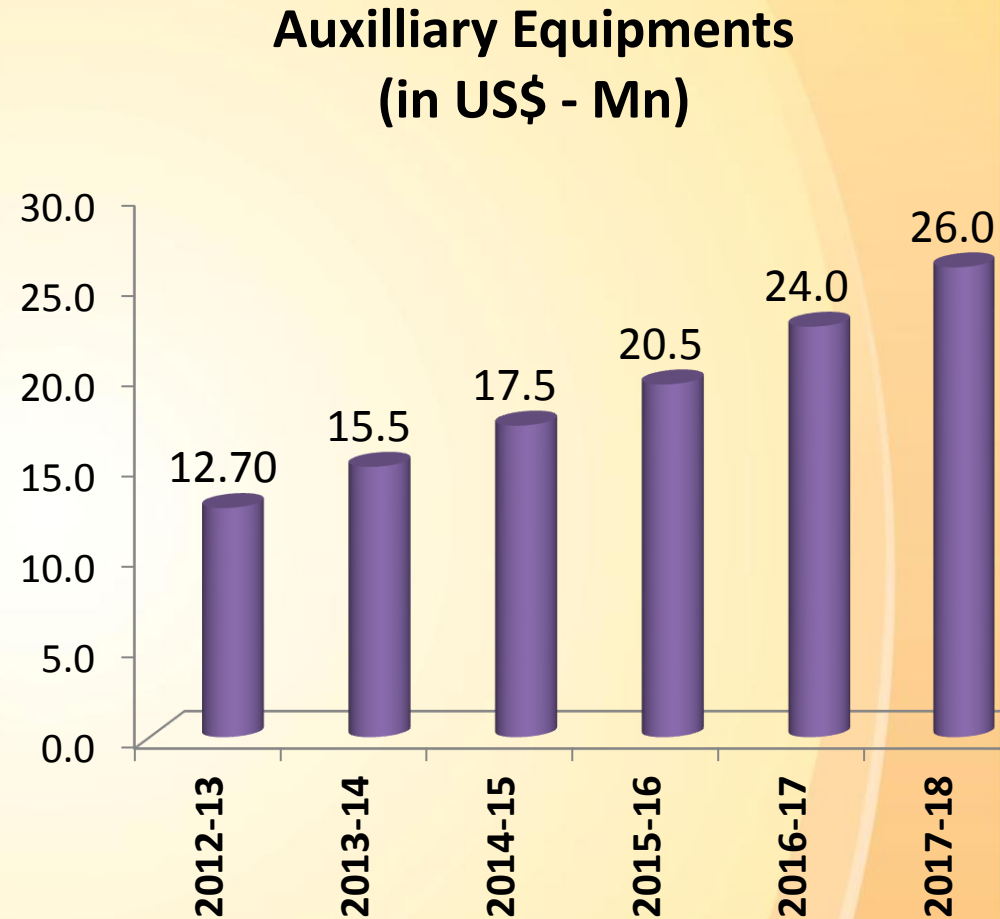
...Project investment to the tune of US \$ 12 Billion
 IM, Pipe, Raffia, Films are growth drivers



Auxiliary Equipment

Auxiliary Equipment Industry 13-14

Auxiliary Equipments in Plastics Industry	
Product	Units
Chilling plant	5000
Mould temp. Controller	1200
Drying System	
- Hot Air Dryer	4000
- Dehumidified Air Dryer	800
Raw Material Conveying System	
- Hopper Loader	8000
- Central Conveying System	75
Volumetric/Gravimetric Blending System	700
Conveyor Belt with Counting System	500
Granulator	3800
Robot	150
Hot Runners	900



Auxiliary equipment share - 10-15% of machinery business

Polymer Growth Opportunities

Demand Growth Drivers – Packaging

Growth Drivers

- Food / Processed food
- FMCG items
- Packaged and fast food industry
- Single serve packs/Power packs
- Shopping bags/Bags on rolls
- Textiles and Toys

Applications

- Multilayer films
- BOPP Films
- Shrink & Stretch wraps
- Thin wall molding
- Thermoforming
- Blow molded containers



Retail revolution setting pace for growth in packaging

Demand Growth Drivers – Infrastructure

Growth Drivers

- Building and construction
- Public utilities services
- Mega highway projects
- Rural electrification projects
- Mega irrigation projects
- 24 X 7 Water supply projects

Applications

- Pipes (gas, water supply, sewerage)
- Storage tanks
- Profiles
- Geotextiles



The 12th plan envisages investment of ~ \$ 43 bn for water management; \$ 92 bn for irrigation sector; \$ 220 bn for power generation

Demand Growth Drivers – Agriculture

Growth Drivers

- Advanced agricultural technology
- Government spending
- Retailers – farmers joint initiatives
- Distribution channel / Refrigerated storage

Applications

- Greenhouse films
- Low tunnels
- Micro irrigation: Drip / Sprinkler
- Mulch films
- Crates, Pallets



Bringing about the 2nd green revolution

Growth Drivers

- Healthy economic growth
- Higher per capita income
- Greater disposable income

Applications

- Appliances - Washing machines, Refrigerators, TV's, Mobile Phones, Computers
- Household – furniture & toys
- Office, Restaurant & Stadia Furniture
- Luggage
- Houseware



Growth Drivers

- India as a medical tourism destination
- Growing health awareness

Applications

- Heart valves, hearing aids, spectacles, prosthetics, etc.
- Packaging of medicines, devices etc.
- Disposable products : Syringes, IV sets, blood bags, diapers, bed covers, pillow covers, gowns, masks, gloves etc.



Other Growth Areas

- Rigid Packaging
- Automotive
- Industrial Components



Plastic Parks -Existing & Proposed

Plastic Parks	Area (Acres)
Sanand, Gujarat	140
Dahej, Gujarat	100
Narasapura, Karnataka	100
Auraiya, Uttar Pradesh	225
Tamot, Madhya Pradesh	150
Siju village, Odisha	120
Barjora, West Bengal	496
Ibrahimpattanam, Andhra Pradesh	500
Kannur, Kerala	Not Known
Tinsukia, Assam	600.785
North Chennai, Tamil Nadu	300
Panipat, Harayana	Not Known





Conclusions

Achievements of Indian Plastic Processing Industry

- Growth of machinery industry – Installed capacity CARG of 11% (2000/01 to 2013/14)
- Global companies investing in India
- One of the largest BOPP line in India
- World's largest integrated clean room FIBC manufacturing facility
- World's largest CD/DVD manufacturing facility
- World headquarters for largest Lamitube manufacturer
- Proposed Policies of government for growth of plastic industry
 - Technology Upgradation Fund Scheme
 - Plastic Parks



IndiaHappening

- Established democracy & stable democratic government with favorable economic policies.
- Young population; median age of 24 years
- Setting up of SEZs to overcome bottlenecks of infrastructure and create business friendly policies
- Large pool of scientific and technically trained manpower
- India, the largest market in South Asia
- Rising income levels and changing lifestyles driving demand for plastics

Together We Prosper!

Summary

- Indian economic fundamentals are robust despite current gloom and continuing uncertainty in global economy
- Huge growth opportunities in India for plastics due to lower per capita consumption as compared to world average
- Flexible packaging industry poised for strong growth, insulated from the current economic scenario due to huge & diversified consumer base
- New applications /innovations in Packaging development are driving growth in India and these are ably supported by the current and upcoming domestic capacities



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