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# Executive Summary

The global plastics industry is observing a continuous shift of production bases to low-cost Asian countries. With increasing foreign investment and rise in the number of new manufacturing establishments in the region, Asia has become the largest and the fastest growing market for plastics in the world. In particular, China and India offer enormous growth opportunities due to expanding production activities in the countries. Growth in plastic industry in India was boosted after the economic liberalization in 1991. The subsequent deregulation and privatization resulted in resurgence in all the end-user sectors such as packaging, construction, telecom, automotive and white goods.

Packaging sector is the largest application sector for the plastic industry, representing almost 60.0% the total plastics demand in FY’2013. Estimated at ~ million tons in FY’2013, plastic consumption for packaging in India is expected to reach 10.0 million tons by 2020. The FMCG sector compiled with rise in capital investment pose as the key growth drivers for the packaging industry in the country. The consumer base for several commodities in India, especially FMCGs is expanding due to the rising disposable income of the population.

The demand for packaging of these products has lead to the development of the plastic packaging industry in the country. Among the vast family of plastics, Polyethylene Terephthalate, popularly known as PET, is expected to grow the fastest at 11.0% annually. Majority of the PET available in India is utilized in the production of bottles. In the recent years, PET bottles have inundated the Indian market, with annual growth rate in consumption exceeding 20.0%.

PET is constantly replacing conventional bottle raw materials such as glass and metal. Apart from being lightweight, PET offers several other advantages such as pack weight reduction, ease of handling and longer shelf life of packaged goods. Furthermore, PET bottles are persuasive in terms of sustainability, technical performance and aesthetics. PET packaging is increasingly being used in healthcare and personal care products, packaged foods and beverages markets. Advancements in packaging material science and mounting demand for product protection and stability are further driving demand for PET bottles in India.

The demand for preforms is directly driven by the consumption of PET bottles in India. The production of PET preforms in India in FY’2008 was estimated to be ~ thousand tons, which has been growing at 19.2% CAGR to reach ~ thousand tons in FY’2013. In terms of turnover, the preforms market in India in FY’2013 was INR ~ million and has been growing at 20.1% CAGR from INR ~ million in FY’2008. Preforms are manufactured for different end user applications, comprising segments such as carbonated soft drinks, packaged drinking water, alcoholic beverages and others.

The dominance of the organized and unorganized sector in the Indian PET preforms market varies in all end user applications of preforms. The major companies operating in the organized segment of the PET preform market in India are Manjushree Technopack Ltd., Sunrise Containers Ltd., Chemco Plastic Industries Ltd., National Polyplast (India) Ltd. and Parle Agro Pvt. Ltd. The PET preforms market in India is anticipated to grow substantially on account of the shifting preference from glass bottles to PET bottles, rising demand for consumer goods and packaged drinking water, and the development of retail channels in the country.

# Key Topics Covered in the Report

* The market size of India PET preform industry in terms of production volume and turnover
* Market segmentation of the PET preforms market in India by end-user applications and organizational structure of the market
* Import and export scenario of PET preforms
* Required investment for establishing a pet preforms manufacturing plant in India
* Trends and developments in India PET preform market
* Government regulations and certifications in the Indian PET preform market
* Growth drivers and challenges in the PET preform market in India
* Market shares of major players in India PET preform market
* Competitive scenario of major companies in India PET preform market
* Future outlook and projections of PET preform market in India