India plastic packaging landscape

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Overview: India plastic packaging landscape

• Type of FMCG business: **branded** and **unbranded**

• Scale of operation: **regional** and **national**

• Quantum of **packaging placed on market** (POM):
  - **Branded:** three million tonnes (Source: CPCB EPR portal)
  - **Unbranded:** unknown, but estimated to be greater than branded
India’s plastic recycling landscape

Distribution of recycling units
India’s plastic recycling landscape

- Involvement of both formal and informal stakeholders in collection, segregation and recycling

- **Polyolefin** recycling units make up **two-thirds** of recycling units **(by number)**
India’s plastic recycling landscape

• Utilization rates low

• **Closed-loop recycling: \( \leq 5\% \) of installed capacity (all resins)**

• Large proportion of recyclate is used for low-value applications

• **Large proportion of recycling companies are MSMEs**
Action

- **IPP** signatories control **20% of packaging placed on market**

- Currently only **1%** average **recycled content** across signatory packaging: **huge potential for growth**
Together, we can