India plastic packaging landscape

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Global Insights: India Sustainable Plastic Packaging Webinar

Thursday, 18 January 2024

Managed by

Confederation of Indian Industry

CII-ITC Centre of Excellence for Sustainable Development

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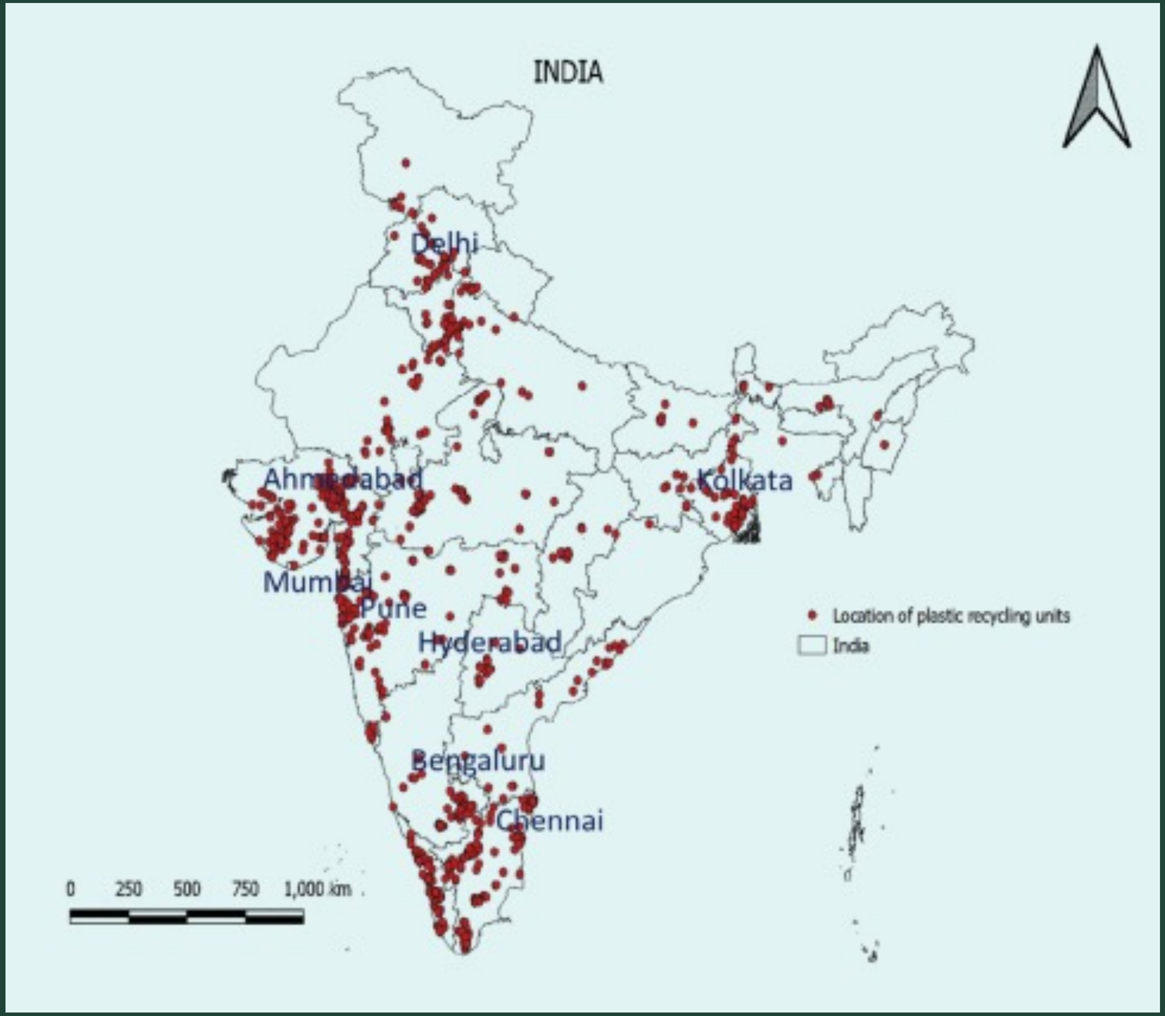
Overview: India plastic packaging landscape

- 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

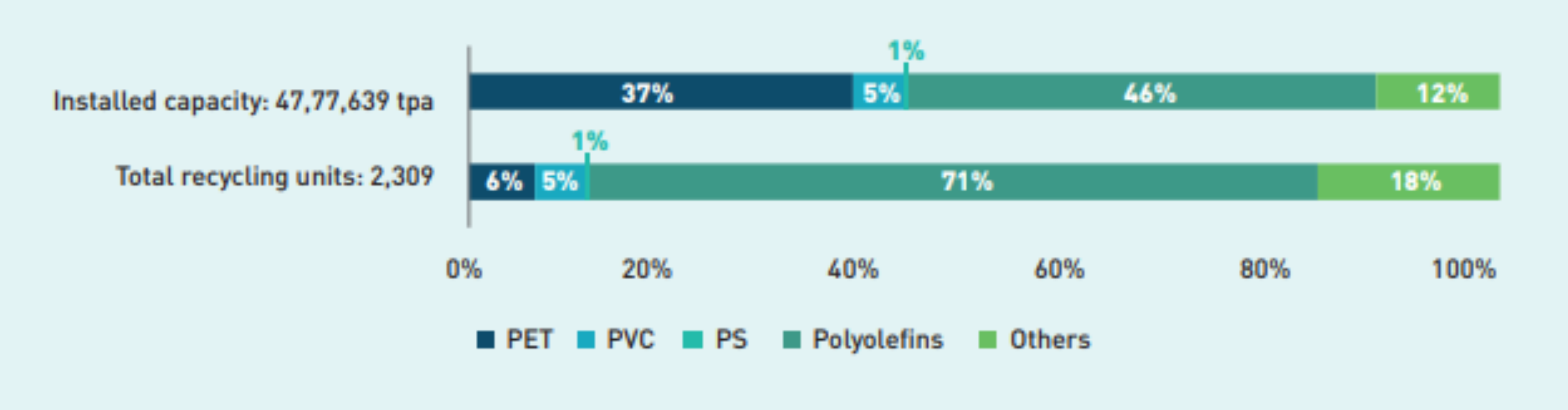
India’s plastic recycling landscape



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: ≤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**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