

India PET Preform Market Outlook to 2018 - Rising Demand for PET Packaging to Provide Growth Impetus

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Abstracts

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

Contents

1. INDIA PET PREFORM MARKET INTRODUCTION

2. VALUE CHAIN ANALYSIS OF INDIA PET PREFORMS MARKET

2.1. PET Preform Value Chain in India

2.2. Preforms in the PET Bottles Value Chain

3. INDIA PET PREFORM MARKET SIZE, FY'2008-FY'2013

3.1. By Production Volume, FY'2008-FY'2013

3.2. By Turnover, FY'2008-FY'2013

4. INDIA PET PREFORM MARKET SEGMENTATION, FY'2008-FY'2013

4.1. By Application, FY'2008-FY'2013

4.2. By Organized and Unorganized, FY'2013

5. PRICING SCENARIO IN INDIA PET PREFORM MARKET

6. EXPORT IMPORT SCENARIO IN INDIA PET PREFORM MARKET

7. REQUIRED INVESTMENT FOR ESTABLISHING A PET PREFORMS MANUFACTURING PLANT IN INDIA

8. TRENDS AND DEVELOPMENTS IN INDIA PET PREFORM MARKET

Continuous Capital Expenditure

Increasing Usage of Compression Technology

Conversion Price Model

9. GOVERNMENT REGULATIONS AND CERTIFICATIONS IN INDIA PET PREFORM MARKET

FDA compliances

European Regulations

Bureau of Indian Standards

Import Duty, Taxes and Import Restrictions
Small Scale Industries (SSI) Registration

10. GROWTH DRIVERS AND OPPORTUNITIES IN INDIA PET PREFORM MARKET

Low Per Capita Consumption of PET in India
Shift to PET Bottles from Glass Bottles
Growth of the Packaging Industry in India
Development of Retail Channels in India
Rising Demand for Bottled Water

11. ISSUES AND CHALLENGES IN INDIA PET PREFORM MARKET

High Initial Capital Investment
High Volatility in Raw Material Prices
Ban of PET Bottles for Pharmaceutical Packaging
Other Issues in India PET Preform Industry

12. MARKET SHARES OF MAJOR COMPANIES IN INDIA PET PREFORM MARKET, FY'2013

13. COMPETITIVE SCENARIO OF MAJOR COMPANIES IN INDIA PET PREFORM MARKET

14. INDIA PET PREFORM MARKET FUTURE OUTLOOK AND PROJECTIONS, FY'2014-FY'2018

- 14.1. By Production Volume, FY'2014-FY'2018
- 14.2. By Turnover, FY'2014-FY'2018
- 14.3. Cause and Effect Relationship in India PET Preform Market

15. MACROECONOMIC FACTORS IN INDIA PET PREFORM MARKET; HISTORICAL AND PROJECTED

- 15.1. Packaging Industry Market Size in India, FY'2008-FY'2018
- 15.2. Per Capita Consumption of PET (Polyethylene Terephthalate) in India, FY'2008-FY'2018
- 15.3. Polymers Production in India, FY'2008-FY'2018
- 15.4. PET Resin Demand in India, FY'2008-FY'2018

15.5. Personal Disposable Income in India, FY'2008-FY'2018

16. APPENDIX

16.1. Market Definitions

16.2. Abbreviations

16.3. Research Methodology

Data Collection Methods

Approach

Variables (Dependent and Independent)

Final Conclusion

16.4. Disclaimer

List Of Figures

LIST OF FIGURES

Figure 1: India PET Preform Market Value Chain

Figure 2: The Role of Preform in PET Bottle Value Chain

Figure 3: India PET Preform Market Size on the Basis of Production in Thousand Tons, FY'2008-FY'2013

Figure 4: India PET Preform Market Size on the Basis of Turnover in INR Million, FY'2008-FY'2013

Figure 5: India PET Preform Market Segmentation by End-user Application on the Basis of Production in Percentage (%), FY'2013

Figure 6: India PET Preform Market Segmentation by Organized and Unorganized Sector in Percentage (%), FY'2013

Figure 7: India Export and Import of PET Preforms in Thousand Tons, FY'2013-FY'2014

Figure 8: India Export and Import of PET Preforms in INR Million, FY'2013-FY'2014

Figure 9: India PET Preform Market Future Projections on the Basis of Production in Thousand Tons, FY'2014-FY'2018

Figure 10: India PET Preform Future Projections on the Basis of Turnover in INR Million, FY'2014-FY'2018

Figure 11: India Packaging Industry Market Size in INR Million, FY'2008-FY'2018

Figure 12: Per Capita Consumption of PET in India in Kilograms, FY'2008-FY'2018

Figure 13: Polymer Production in India in Million Tons, FY'2008-FY'2018

Figure 14: PET Resin Demand in India in Million Tons, FY'2008-FY'2018

Figure 15: Personal Disposable Income in India in INR Million, FY'2008-FY'2018

List Of Tables

LIST OF TABLES

Table 1: Required Parameters for the Establishment of a PET Preforms' Manufacturing Plant

Table 2: Cost Structure for the Establishment of a PET Preforms' Manufacturing Plant

Table 3: Means of Finance for Establishing a PET Preforms' Manufacturing Plant

Table 4: Financial Indicators Related to the Establishment of a PET Preforms' Manufacturing Plant

Table 5: Market Share of Major Companies in India PET Preform Market on the Basis of Revenue in INR Million, FY'2013

Table 6: Competitive Landscape of Major Players in India PET Preform Market

Table 7: Clientele of Major Companies in India PET Preform Market

Table 8: Cause and Effect Relationship Analysis between Industry Factors and Expected PET Preform Market Prospects in India

Table 9: Correlation Matrix of India PET Preform Market

Table 10: Regression Coefficients Output

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