

The Consumer Packaging Markets in India

A five-year forecast to 2017-18



The packaging industry in India has become increasingly sophisticated in the last decade and has attracted interest of several investors. The growth of the packaging sector in India has been ahead of the nation's GDP growth. The need for an analysis on the vibrant packaging market in India has never been greater. This independent up-to-date study of the consumer packaging markets in India provides an assessment of the market size and 5-year forecasts up to 2017-18.

McG

Madras Consultancy Group

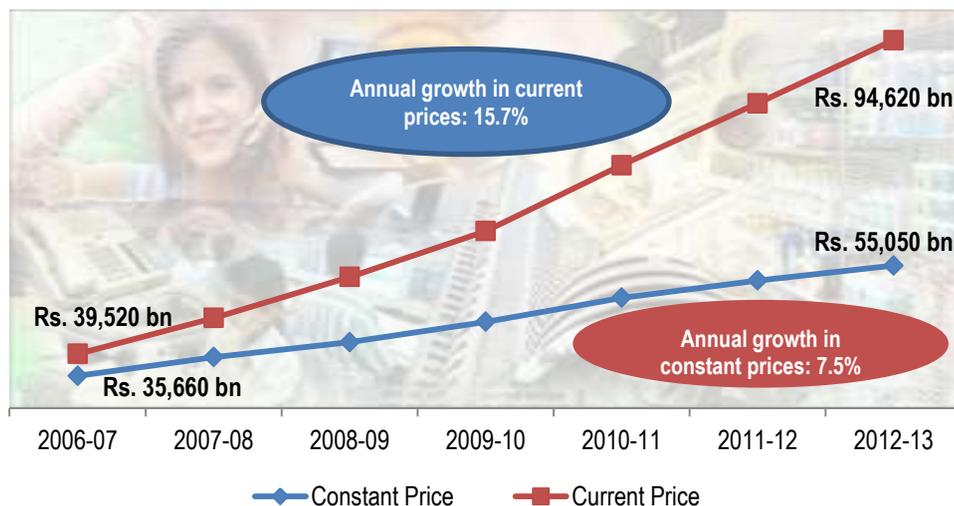
2nd Floor, MN Plaza, # 15/16, 3rd Cross Street, Kasturba Nagar, Adyar, Chennai 600020 India
Tel : +91 44 42113434 email : admin@mcg.in URL : www.consultmcg.com

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A five year forecast to 2017-18

This new report titled “The Consumer Packaging Markets in India- a five year forecast to 2017-18” prepared by Madras Consultancy Group (MCG), Chennai, provides an independent and comprehensive analysis of the consumer packaging industry and detailed forecasts till 2017-18. Analysis includes an overview of the industry, consumption and demand forecasts, key drivers and trends, market break-up by end use sectors, package type and region, supply analysis, profiles of select players & end use sectors and recent industry developments. The 270-page (about 68,000 words) report is based on extensive secondary research supported by primary research conducted in India, between April and July 2013.

With an average annual GDP growth rate at 7.5% since 2006-07, the Indian economy has managed to perform well in a world buffeted by financial melt downs. While India withstood the global recession of 2009-10, the economy has slowed down since 2011-12. GDP grew at 5.0% during 2012-13 and is projected to grow at 4.8% during 2013-14.



Source: Economic Survey 2012-13

A wide range of consumer industries across food, beverages, healthcare, personal care, household products, other consumer goods and several industrial sectors that use packaging, are now focussed on making packaging work beyond its functional dimensions of protection, convenience and economy, towards building their brands and identities. Packaging, per se, is fast taking its rightful place in the “marketing mix” of brand owners.

Key Highlights of the packaging market in India

- Consumer packaging market in India is forecast to expand between 11 to 12% p.a, in real terms, over the next 5 years
- The per capita spend on “consumer” packaging is low at Rs. 390 and thus offers immense potential for growth
- While the packaging industry is highly fragmented, consolidation has begun to take place
- From an era of “comparative packaging economics”, the brand owners are moving towards packaging that builds brands and add “value” to the consumer

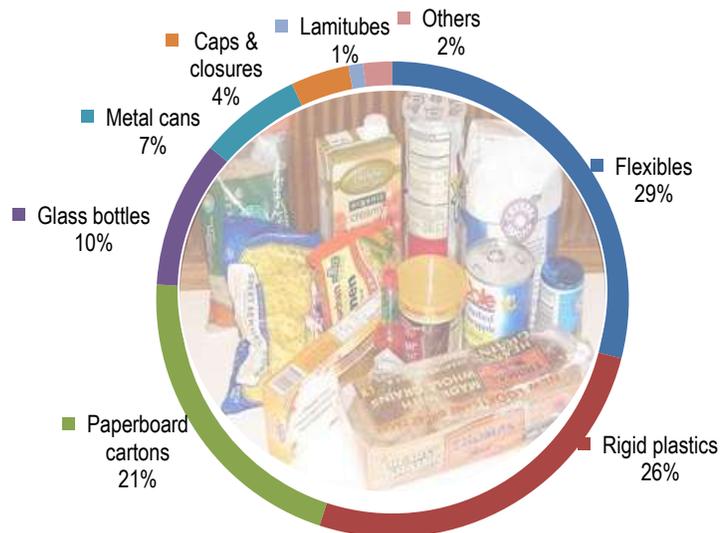
Select trends that will drive the packaging industry’s growth include urbanisation, life style changes, retail revolution, the ubiquitous electronic media, increasing health & hygiene awareness, the role of women in purchasing decisions, child centric products, recycling and green packaging.

Valued at around Rs. 825 bn (USD 15.3 bn) in 2012-13, the packaging market in India has been growing at 14%-15% per annum. Of this consumer packaging accounted for around 57% and the rest by bulk packaging. Within consumer packaging, flexible packaging is the major contributor accounting for 29% of the market and has been growing significantly during the last 5 years. Metal cans and glass bottles have been giving way to other packaging media such as flexible packaging, plastic jars and printed folded cartons.

Notes:

- the market value excludes cenvat/taxes
- All market size estimates and forecasts in this report are in value terms
- The report is available in INR and US\$ versions

Consumer packaging market in India: Break up by segments
Total: Rs. 472 billion (USD 8.7 billion)



Who will benefit from this study?

The study will provide valuable information and data pertaining to the Indian consumer packaging industry and is an essential reading material for the industry professionals such as:

Source: MCG research

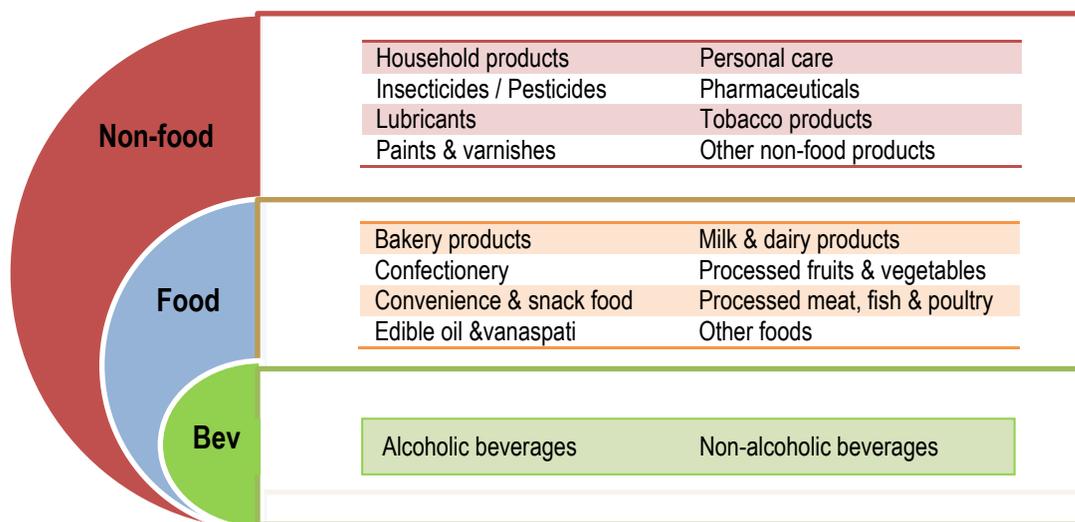
- | | |
|--|---------------------------------------|
| ▪ Manufacturers / converters of packaging | ▪ Investors and stock brokering firms |
| ▪ Brand owners of consumer products | ▪ Consultants to the industry |
| ▪ Raw material manufacturers | ▪ Government Departments |
| ▪ Package making & filling machinery manufacturers | |

Why should you buy this report?

This report will assist you in:

- Formulating broad business strategies using the market estimates and forecasts
- Understanding market dynamics between packaging media and end use markets
- Understanding the key trends in the end use markets and strategise investments accordingly
- Assessing the competition
- Identifying the growth opportunities and industry dynamics across various packaging types and end use markets

The research covers all major end user sectors spread across non-food, food and beverages segments, as outlined below. Brief profiles of each end use sector including market dimension, key players and recent developments have been compiled as a part of the report.



The Consumer Packaging Markets in India A Five-year outlook to 2017-18

Table of Contents (summary)

(Note: All market size estimates and forecasts in this report are in value terms)

| Chapter | Title |
|---------|--|
| I | Introduction Study objective, research methodology |
| II | Executive Summary economic & demographics trends, the Indian packaging market overview, estimates and forecasts to 2017-18 with break-up by package type, end user segments and region |
| III | Flexible packaging Pre-made pouches, Laminates, Co-extruded films |
| IV | Rigid plastics PET bottles & jars, Other rigid plastic materials |
| V | Paperboard Folding cartons, Liquid cartons, Composite cans |
| VI | Glass bottles |
| VII | Metal cans OTS cans, 3-piece general line cans, Aerosols, Aluminium beverage cans |
| VIII | Caps & closures, Laminates Plastic caps & closures, ROPP caps, Crown closures, lug caps, laminates |
| IX | Brief profile of packaging user industries Appendix |

Note : Chapters III to IX will include industry structure, packaging types, select specifications, analysis of the end-user markets including market-size estimates for 2011-12, 2012-13 and forecasts for 2017-18 with market break-up by packaging product types, end user segments and region. Comprehensive listing of specific applications, recent developments and brief profile of select package converters are also included.

About MCG

Founded in 1985, MCG is a management consulting firm with a special focus on Market Entry Strategy, Industry Analysis, Market Research and Feasibility Studies across various B2B sectors. In the **Packaging field**, MCG has over 28 years' of research and consulting experience and has conducted several studies on various packaging products, in India and abroad. MCG has also assisted an international publisher in producing a large number of global reports on a range of packaging products.



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