

The Consumer Packaging Markets in India

- A Five Year Forecast to 2020-21-

An in-depth industry report from
McG

McG

Madras Consultancy Group

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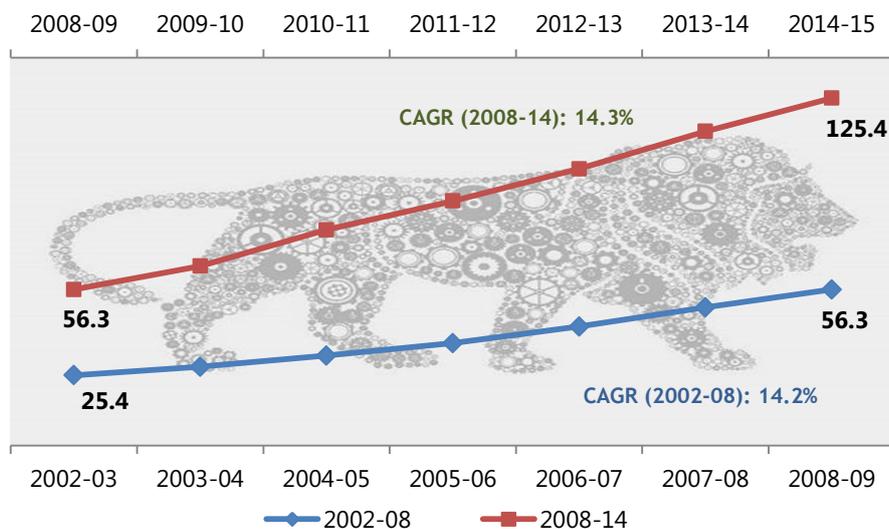
In the recent years, Indian packaging industry has emerged as a dynamic player in the global arena. Traditional focus on cost reduction which was an impediment to growth, has given way to innovative packaging formats that capitalise on the strength of packaging as a medium to promote products. The packaging industry in India is valued at INR 1,270 billion (2015-16). Within the industry, with a 54 per cent market share, consumer packaging is ahead of its bulk packaging counterpart. With the spread of organised retail, FMCG and product companies are increasing adopting packaging as key element of their product promotion strategies. The packaging industry in India is witnessing significant investments in modern technology, capacity enhancement and introduction of new products.

This syndicated report entitled "The Consumer Packaging Markets in India- a five year forecast to 2020-21" prepared by Madras Consultancy Group (MCG), Chennai, is the 2nd edition and an update of the earlier report published in Nov 2013. The report provides an

independent and comprehensive analysis of the consumer packaging industry and detailed forecasts till 2020-21. Analysis includes an overview of the industry, consumption and demand forecasts, key drivers and trends, market break-up (end use sectors, package type and region), supply analysis, profiles of select players & end use sectors and recent industry developments. The report also provides an understanding of the usage of each packaging substrate by volumes and forecasts thereof. The 250-page report is based on extensive secondary research supported by primary research conducted in India, between April to June 2016

The Indian GDP crossed the INR 125 trillion (US \$ 2 trillion) mark in 2014-15. The economy, after a couple of years of slowing down, picked up pace and registered a growth of 6.9% in 2013-14, followed by 7.3% in 2014-15 and the estimate for 2015-16 is in the range of 7.3 to 7.5%. Going forward, the official forecast for the next few years is in the range of 7.0 to 7.5%.

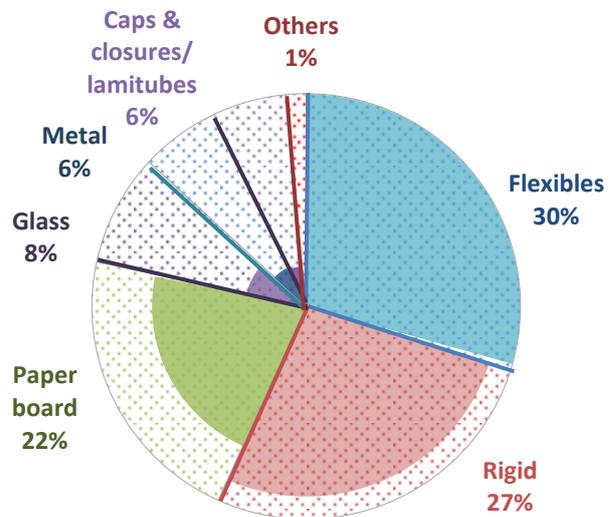
Indian economy: GDP (Current prices) 2002-03 to 2014-15 INR Trillion



The Indian consumer packaging market is estimated at around INR 685 billion in 2015-16 and is forecast to reach INR 1,170 billion by 2020-21, at an annual growth rate of 11.3%. Within consumer packaging, flexible packaging is the major contributor accounting for 30% of the market and has been growing significantly during the last 5 years. Metal cans and glass bottles have lost market share to other packaging substrates such as flexible packaging, plastic jars and printed folded cartons.

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.

Consumer packaging market in India: Break up by segments
Total: Rs. 685 billion (US\$ 10.5 billion)



Foods

- Processed fruits & vegetables
- Processed fish & meat
- Convenience & snack foods
- Milk & dairy products
- Biscuits & confectionery
- Cooking medium
- Tea & coffee
- Other foods (staple foods, etc.)

Non-foods

- Pharmaceutical products
- Personal care products
- Household products
- Paints & varnishes
- Pesticides / insecticides
- Cigarettes & tobacco
- Lubricants
- Other non-foods

Beverages

- Carbonated soft drinks, bottled water & other non-alcoholic beverages
- Alcoholic beverages

Key questions addressed in this industry analysis report:

What is the market size of the Indian consumer packaging market?

What is the market share of the key packaging media viz flexible, rigid plastics, paperboard, metal can, glass, caps & closures as well as lamitubes?

What is the usage volume of each medium and the key product segments thereof?

What are the applications of each medium across food, beverage and non-food packaging and the recent trends?

Where are the most noteworthy growth markets for each packaging medium across user segments?

What is the market forecast for the period 2015-20 with break up by packaging medium and across corresponding usage across application segments?

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:

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- | | |
|--|---------------------------------------|
| ▪ 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 | |
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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 substrates 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 Consumer Packaging Markets in India A Five-year outlook to 2020-21

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Chapter	Title
I	Introduction Study objective, research methodology
II	Executive Summary Indian economic & demographics trends, the Indian consumer packaging market overview, estimates and forecasts to 2020-21 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, Lamitubes Plastic caps & closures, ROPP caps, Crown closures, lug caps, lamitubes
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 2014-15, 2015-16 and forecasts for 2020-21 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 30 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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