

India Plastic Recycling Market By Type (Polyethylene Terephthalate (PET), Polyethylene (PE), Polypropylene (PP), Polyvinyl Chloride (PVC), Polystyrene (PS), Others), By Source (Bottles, Films, Fibers, Foams, Others), By Method (Thermal, Chemical, Mechanical, Landfill), By End User (Packaging, Building & Construction, Textile, Automotive, Electrical & Electronics, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Report description:

India Plastic Recycling Market achieved a market size of USD 2188.65 Million in 2024 and is poised for strong growth in the forecast period, with a projected Compound Annual Growth Rate (CAGR) of 10.76% through 2030.

Plastic waste has emerged as a significant environmental challenge, prompting global efforts towards sustainable waste management. India has taken a prominent role in this transformative journey, marked by a growing emphasis on plastic recycling. The proliferation of plastic waste poses a severe threat to the environment, leading nations, including India, to intensify their efforts in effective plastic waste management. The Indian plastic recycling market has undergone noteworthy developments, driven by an increasing awareness of environmental sustainability and the imperative to reduce the environmental impact of plastic waste. Presently, there are 1,419 registered plastic waste processors operating in accordance with the Plastic Waste Management Rules.

India, as one of the largest global consumers of plastic, grapples with substantial challenges in managing its plastic waste. The current scenario involves a mix of informal and formal recycling processes, with a growing demand for recycled plastic materials across various industries. Around 34.7 lakh tonnes per annum (TPA) of plastic wastes was generated by India during 2019-20, as per the Ministry of Environment.

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Technological advancements play a pivotal role in shaping the plastic recycling industry in India. Innovations, ranging from advanced sorting mechanisms to state-of-the-art recycling processes, are enhancing efficiency and scalability. Simultaneously, circular economy initiatives, including extended producer responsibility (EPR) programs, gain momentum as governments and corporations commit to taking responsibility for the entire lifecycle of plastic products.

The challenges within India's plastic recycling landscape are characterized by a fragmented infrastructure, encompassing both formal and informal players. This fragmentation poses difficulties in terms of standardization, regulation, and the overall efficiency of the recycling process. Maintaining the quality of recycled plastic materials remains a persistent challenge, with a priority placed on meeting industry standards for acceptance in various sectors.

Amidst these challenges lie significant opportunities. Rising consumer awareness about the environmental impact of plastic waste is driving demand for sustainable products. This presents a substantial opportunity for businesses engaged in plastic recycling. Government support through policy interventions, financial incentives, and regulatory frameworks is creating a conducive environment for the growth of the plastic recycling market in India.

Research plays a pivotal role in addressing existing challenges and unlocking new opportunities in the plastic recycling market. Key research areas include improving recycling technologies, developing sustainable packaging alternatives, and assessing the environmental and economic impact of plastic recycling initiatives.

India's plastic recycling market stands at a crucial juncture, necessitating sustainable solutions. This market overview underscores the evolving landscape and the critical role of research in shaping the future of plastic recycling in India. As the nation strives for a more sustainable and circular economy, collaborative efforts from government, industry players, and researchers are essential to drive positive change in the plastic recycling sector.

Key Market Drivers

Rising Demand for Recycled Plastic Propels Indian Plastic Recycling Market Growth

The Indian Plastic Recycling Market is experiencing robust growth, propelled by the rising demand for recycled plastic across various industries. The awareness of environmental sustainability and the imperative to address plastic pollution have catalyzed a significant shift in consumer and industry preferences towards recycled plastics. This surge in demand is reshaping the landscape of plastic recycling in India, creating opportunities for recycling enterprises, fostering circular economy practices, and contributing to a more sustainable approach to plastic usage.

One of the primary drivers behind the growth of the Indian Plastic Recycling Market is the increasing demand for recycled plastic materials. As environmental concerns intensify, consumers, businesses, and regulatory bodies are placing greater emphasis on reducing the reliance on virgin plastics and promoting the use of recycled alternatives. This shift is evident across a spectrum of industries, including packaging, textiles, construction, and automotive, where recycled plastics are gaining traction as a preferred raw material. The versatility of recycled plastics in meeting the diverse needs of these industries is a key factor fueling the market's expansion.

The packaging industry, in particular, is a major contributor to the surge in demand for recycled plastics. With a growing emphasis on sustainable packaging solutions and the need for businesses to meet eco-friendly benchmarks, recycled plastics offer a viable alternative to conventional packaging materials. India's PET bottle recycling rate is 90% beating the US's recycling rate is 33% and Japan's is 72% far behind. This trend is not only driven by consumer preferences for environmentally responsible products but is also influenced by regulatory measures aimed at reducing single-use plastics and encouraging the adoption of recycled content in packaging.

The construction and building materials sector is embracing recycled plastics to address both environmental and economic considerations. Recycled plastics find applications in the production of items such as plastic lumber, pipes, and insulation materials. The construction industry's adoption of recycled plastics aligns with sustainability goals, reduces dependence on traditional construction materials, and contributes to waste reduction. This growing demand within the construction sector is bolstering the overall momentum of the Indian Plastic Recycling Market.

In addition to these industries, the textile and automotive sectors are increasingly incorporating recycled plastics into their manufacturing processes. Recycled plastics, when used in textiles and automotive components, offer a combination of cost-effectiveness, reduced environmental impact, and adherence to corporate sustainability goals. As consumer awareness grows and regulatory frameworks evolve, these sectors are likely to further drive the demand for recycled plastics in India.

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The government's initiatives and regulatory measures also play a pivotal role in propelling the Indian Plastic Recycling Market. Policy interventions aimed at curbing plastic pollution, promoting extended producer responsibility (EPR), and incentivizing recycling practices create a conducive environment for the growth of the recycling industry. The emphasis on creating a circular economy for plastics, where materials are reused and recycled rather than discarded after a single use, is a key focus area driving the market forward.

Technological advancements and innovations in plastic recycling processes contribute to the market's expansion. Advanced recycling technologies, such as chemical recycling and mechanical recycling, are enhancing the efficiency of plastic waste conversion into high-quality recycled materials. These innovations not only improve the quality of recycled plastics but also make the recycling process more economically viable, further encouraging businesses to incorporate recycled content into their products.

The rising demand for recycled plastic is a driving force behind the growth of the Indian Plastic Recycling Market. The confluence of consumer awareness, industry preferences for sustainable practices, government initiatives, and technological advancements is reshaping the dynamics of plastic usage in India. As the momentum towards a circular economy for plastics gains traction, the plastic recycling sector is poised for sustained growth, offering solutions that address environmental concerns, contribute to resource conservation, and foster a more sustainable and responsible approach to plastic consumption in the country.

Rising Demand from Packaging Industry is Driving the India's Plastic Recycling Market Growth

The Plastic Recycling Market in India is experiencing substantial growth, propelled by the rising demand from the packaging industry. With an increasing focus on sustainability and environmental responsibility, the packaging sector in India is undergoing a transformative shift towards incorporating recycled plastic materials. This transition is fueled by a combination of regulatory initiatives, consumer awareness, and industry collaborations that aim to address the challenges posed by plastic waste. The demand for recycled plastic materials within the packaging industry has emerged as a key driver, steering the growth trajectory of the Plastic Recycling Market in India.

One of the primary catalysts behind the surge in demand for recycled plastics is the growing acknowledgment of the environmental impact of single-use plastics. With heightened concerns about plastic pollution and its detrimental effects on ecosystems, the packaging industry is actively seeking alternatives that align with circular economy principles. Recycled plastics, sourced from post-consumer and post-industrial waste, offer a sustainable solution by diverting plastic from landfills and reducing the need for virgin plastic production. The packaging sector's commitment to environmental stewardship is exemplified by the increasing adoption of recycled plastics in various packaging applications.

Regulatory measures and policies aimed at curbing plastic pollution are shaping the landscape of the plastic recycling industry in India. Government initiatives, such as Extended Producer Responsibility (EPR) regulations, impose responsibilities on manufacturers and producers to manage the end-of-life disposal of their products. This has led to a heightened emphasis on recycling and sustainable packaging practices, with the packaging industry actively seeking recycled plastics to fulfill their EPR obligations. The regulatory framework acts as a catalyst, encouraging the integration of recycled plastics into packaging materials and driving market growth.

The packaging industry's response to changing consumer preferences and attitudes towards sustainability is steering the demand for recycled plastics. Consumers are increasingly gravitating towards eco-friendly and sustainable packaging options, prompting brands and manufacturers to incorporate recycled materials into their packaging designs. Recycled plastics, with their reduced carbon footprint and resource conservation benefits, resonate with environmentally conscious consumers, driving a shift towards more sustainable packaging solutions. This consumer-driven demand for eco-friendly packaging is a significant factor propelling the growth of the Plastic Recycling Market in India.

Collaborations and partnerships across the value chain are playing a pivotal role in fostering the adoption of recycled plastics in the packaging industry. Collaboration between recyclers, packaging manufacturers, and brand owners ensures a seamless supply chain for recycled materials. The development of closed-loop systems, where manufacturers retrieve and recycle their own packaging waste, is gaining traction as a sustainable business model. These collaborative efforts contribute to the circularity of the plastic value chain and facilitate the integration of recycled plastics into new packaging products.

Technological advancements in plastic recycling processes are enhancing the quality and versatility of recycled plastics, making them more appealing to the packaging industry. Advanced recycling technologies, such as mechanical recycling, chemical

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recycling, and depolymerization, are improving the purity and performance of recycled plastics, enabling their use in a broader range of packaging applications. This technological evolution is crucial for meeting the stringent quality and safety requirements of the packaging industry, further driving the demand for recycled plastics in India.

Hence, the rising demand from the packaging industry is a driving force behind the growth of the Plastic Recycling Market in India. The industry's commitment to sustainability, coupled with regulatory initiatives and changing consumer preferences, is fostering a paradigm shift towards the integration of recycled plastics in packaging materials. Collaborations and technological advancements are instrumental in enhancing the viability of recycled plastics, making them a viable and preferred choice for the packaging sector. As the packaging industry in India continues to prioritize sustainability, the Plastic Recycling Market is poised for sustained growth, contributing to the country's efforts to create a more circular and environmentally responsible plastic economy.

Rising Infrastructure Development is Propelling the India Plastic Recycling Market Growth

The Plastic Recycling Market in India is experiencing robust growth, propelled by the rising wave of infrastructure development sweeping across the nation. As India undergoes rapid urbanization and industrialization, the demand for plastic products in construction, packaging, and various infrastructure projects has surged. This heightened use of plastics, coupled with a growing awareness of environmental sustainability, has given impetus to the plastic recycling sector. The recycling of plastic materials is emerging as a crucial component in India's commitment to managing plastic waste responsibly while simultaneously meeting the demands of a burgeoning infrastructure landscape.

One of the key drivers behind the growth of the Plastic Recycling Market in India is the unprecedented scale of infrastructure development taking place across the country. Mega-projects in sectors such as transportation, energy, and urban development are fueling the demand for plastic products in construction and packaging. Plastic, with its versatility and cost-effectiveness, has become an integral material in various infrastructure applications, including pipes, cables, insulation, and packaging for construction materials. Consequently, the increased usage of plastic in infrastructure projects has amplified the need for efficient plastic recycling solutions to address the resulting waste streams.

The Indian government's initiatives and policies focused on sustainable waste management and environmental conservation have played a pivotal role in propelling the growth of the plastic recycling industry. Regulatory measures, including Extended Producer Responsibility (EPR) frameworks and stringent waste management regulations, have compelled industries to adopt environmentally responsible practices. Plastic recycling, as a sustainable solution, aligns with these initiatives by diverting plastic waste from landfills and incineration, contributing to the circular economy and mitigating the environmental impact associated with plastic disposal.

The construction industry, a major consumer of plastic products, has witnessed a paradigm shift towards sustainable and recycled materials. Recycled plastics, derived through efficient recycling processes, are finding increased acceptance in construction applications. Plastic recycling supports the circular economy model by reintroducing recycled materials into the manufacturing cycle, reducing the demand for virgin plastics, and minimizing the environmental footprint of construction projects. As the construction sector continues to grow, the Plastic Recycling Market in India is poised to expand proportionally, driven by the industry's commitment to eco-friendly practices.

The packaging industry, a significant user of plastic materials, is increasingly recognizing the importance of incorporating recycled plastics into packaging solutions. As consumer awareness of environmental issues grows, there is a growing demand for sustainable packaging alternatives. Plastic recycling addresses this demand by providing recycled plastics that can be used in the production of packaging materials, reducing the reliance on virgin plastics and contributing to a more sustainable packaging ecosystem. The push for sustainable packaging, driven by both consumer preferences and regulatory pressures, is propelling the growth of the Plastic Recycling Market in India.

The economic benefits associated with plastic recycling further stimulate market growth. Recycled plastics offer a cost-effective alternative to virgin plastics, providing industries with a competitive advantage in terms of material costs. The recycling industry contributes to job creation, technological innovation, and the development of a circular economy, fostering economic growth while addressing environmental challenges.

The Plastic Recycling Market in India is witnessing substantial growth, propelled by the rising tide of infrastructure development. As the nation forges ahead with ambitious projects in construction, transportation, and urbanization, the demand for plastic materials has surged. Plastic recycling emerges as a strategic solution to manage the resulting plastic waste streams, aligning

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with environmental sustainability goals and regulatory frameworks. The integration of recycled plastics in construction and packaging applications reflects a transformative shift towards responsible and sustainable practices. The Plastic Recycling Market in India is well-positioned to play a crucial role in balancing the demands of infrastructure development with the imperative of environmental stewardship.

Key Market Challenges

Limited Market Demand

Limited market demand poses a substantial hindrance to the growth of the plastic recycling market in India. Despite increasing awareness about environmental sustainability, the demand for recycled plastic products is not keeping pace with the rising amounts of plastic waste generated. This mismatch is exacerbated by factors such as consumer preferences, cost considerations, and the availability of cheaper virgin plastics. The recycling industry faces challenges in convincing businesses and consumers to prioritize recycled plastic, limiting its market reach. To overcome this obstacle, stakeholders in the Indian plastic recycling market must focus on education and awareness campaigns, showcasing the economic and environmental benefits of recycled plastics. Collaborative efforts to create a robust market demand, coupled with government incentives and regulations promoting the use of recycled materials, can help spur growth in the Indian plastic recycling sector and address the challenge of limited market demand.

Inadequate Collection and Sorting Mechanisms

Inadequate collection and sorting mechanisms constitute a formidable obstacle hindering the growth of the Indian plastic recycling market. The absence of robust infrastructure for efficient plastic waste collection and sorting undermines the recycling process, leading to a substantial loss of valuable resources and hindering the market's potential. The lack of standardized practices and widespread awareness further exacerbates the challenge, resulting in inefficient recycling practices and environmental concerns.

To overcome this obstacle, stakeholders in the Indian plastic recycling market must invest in the development of comprehensive waste management systems, modern sorting technologies, and public awareness campaigns. Collaboration between government bodies, private enterprises, and local communities is essential for implementing effective collection and sorting mechanisms. By addressing these inadequacies head-on, the Indian plastic recycling market can unlock its full potential, promoting sustainable practices and contributing to the circular economy.

Key Market Trends

Government Initiatives and Regulations

A pivotal trend propelling the growth of the India Plastic Recycling market is the increasing focus on government initiatives and regulations aimed at addressing the environmental impact of plastic waste. With the rising awareness of the ecological challenges posed by plastic pollution, the Indian government has implemented various policies and regulations to promote sustainable plastic management practices. The Plastic Waste Management Rules, introduced in 2016 and subsequently amended in 2018, outline guidelines for the segregation, collection, and recycling of plastic waste.

One significant initiative is the Extended Producer Responsibility (EPR), which mandates producers and brand owners to take responsibility for the collection and recycling of the plastic generated from their products. This approach encourages a more circular economy by involving stakeholders in the entire lifecycle of plastic products, fostering responsible consumption, and driving the development of efficient plastic recycling systems.

The Swachh Bharat Abhiyan (Clean India Mission) launched by the government emphasizes waste management and cleanliness, including the proper disposal and recycling of plastic waste. Various state governments in India have also introduced their own initiatives to regulate and promote plastic recycling, aligning with the national goal of reducing the environmental impact of plastic.

These government initiatives not only create a conducive regulatory environment for sustainable plastic recycling practices but also foster investment in recycling infrastructure and technologies. As a result, the India Plastic Recycling market is witnessing growth as businesses and stakeholders align their operations with these regulations, leading to a more organized and effective plastic waste management system in the country. The combination of regulatory frameworks and government-driven initiatives is pivotal in shaping the trajectory of the India Plastic Recycling market towards a more sustainable and environmentally responsible future.

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Recycling Plastic for Road Construction

A significant trend catalyzing the growth of the India Plastic Recycling market is the innovative practice of recycling plastic for road construction. With India facing challenges related to plastic waste management and the environmental impact of discarded plastics, utilizing recycled plastic in road infrastructure has emerged as a sustainable and resource-efficient solution. The process involves blending shredded plastic waste with bitumen to create a modified bitumen mix, which is then used in road construction. An exemplary case is the use of plastic-modified bitumen in the construction of roads in various Indian states. The incorporation of recycled plastic enhances the properties of bitumen, making the road surfaces more durable, water-resistant, and flexible. This not only contributes to a reduction in the consumption of traditional bitumen but also provides an eco-friendly solution for managing plastic waste. Several cities and municipalities in India have embraced this innovative approach, creating a dual impact of improving road quality while simultaneously addressing the plastic waste crisis.

The Indian government has also played a proactive role in promoting the use of recycled plastic in road construction. Initiatives like the Plastic Waste Management Rules and the Swachh Bharat Abhiyan emphasize the importance of sustainable waste management practices, encouraging the adoption of plastic recycling technologies in infrastructure development. This trend aligns with the broader global movement towards circular economy principles, where waste materials are repurposed to create valuable resources, fostering environmental sustainability.

In conclusion, the recycling of plastic for road construction stands as a key trend propelling the growth of the India Plastic Recycling market. This innovative approach not only addresses the environmental challenges posed by plastic waste but also showcases the potential for turning recycled materials into valuable assets for infrastructure development, illustrating a harmonious balance between waste management and sustainable construction practices.

Segmental Insights

Source Insights

Based on the source, the bottle segment is projected to experience rapid growth during the forecast period. In the forecast period, the bottle segment is anticipated to undergo substantial growth based on its source. This projection reflects a notable surge in demand and utilization of recycled materials sourced specifically from bottles. The growth of the bottle segment in recycling is driven by various factors, including the increasing awareness of environmental sustainability, a growing emphasis on circular economy practices, and the rising demand for recycled materials in the production of new bottles and packaging.

As consumers and industries become more conscientious about the environmental impact of plastic waste, the recycling of bottles is gaining prominence. The bottle segment's anticipated rapid growth aligns with efforts to minimize the ecological footprint associated with single-use plastics. Recycling initiatives and collection systems aimed at bottles contribute to the overall sustainability objectives of reducing plastic pollution and conserving resources.

The bottle segment's projected growth is fueled by the recognition of the economic and environmental benefits of using recycled materials in the manufacturing of new bottles. Incorporating recycled content into bottle production not only conserves energy and reduces greenhouse gas emissions but also lessens dependence on virgin plastic resin, contributing to a more circular and resource-efficient supply chain.

Government regulations, industry collaborations, and consumer preferences are increasingly influencing the shift toward sustainable practices in the packaging sector, further supporting the expected growth of the bottle segment in recycling. The circular approach to utilizing recycled bottles as a valuable source material demonstrates a commitment to creating a more environmentally responsible and resilient packaging industry.

Regional Insights

Based on the region, The West region asserts its dominance in the Indian Plastic Recycling market, owing to a confluence of key factors that collectively propel it to a leadership position within the industry. Serving as the nucleus of India's economic landscape, the West region, with major industrial and commercial centers like Mumbai, Pune, and Ahmedabad, stands as a primary contributor to the generation of substantial plastic waste from both industrial operations and urban consumer activities, thereby supplying a significant feedstock for recycling endeavors.

The region enjoys a notable infrastructure and logistical advantage, marked by well-developed systems that facilitate the efficient collection, transportation, and processing of plastic waste. Well-connected ports and transportation networks further augment the region's capabilities in managing and distributing recycled plastic materials across diverse industries and markets.

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The West region's ascendancy is further propelled by its proactive stance in implementing strategic waste management policies and initiatives. Many states in the region, at the forefront of progressive environmental governance, have actively championed plastic recycling through regulatory measures, awareness campaigns, and incentivization of recycling practices, fostering a regulatory environment conducive to the industry's growth.

The West region's diverse industrial base, spanning manufacturing, petrochemicals, and packaging, serves as a pivotal consumer of recycled plastic materials. This symbiotic relationship between the recycling sector and industrial consumers propels the demand for recycled plastics in the production of various goods.

The region has demonstrated a heightened commitment to innovation and technology adoption in plastic recycling processes, witnessing a higher degree of implementation of advanced recycling technologies such as mechanical and chemical recycling methods. This technological prowess enhances the efficiency and quality of recycled plastic output.

Urban centers in the West region exhibit elevated levels of environmental awareness among consumers. This heightened consciousness regarding plastic waste and recycling practices has resulted in increased participation in recycling programs, fostering a culture of responsible waste disposal and recycling.

Key Market Players

- Ganesha Ecosphere Ltd.
- JB Ecotex Limited
- Pashupati Group
- Dalmia Polypro Industries Pvt. Ltd.
- Alliance Fibres Ltd
- Lucro Plastecycle Private Limited
- AI Mehtab Industries Pvt. Ltd
- Shree Sadguru Plastic Industries
- Parkash Plastic
- Mittal Polygrains LLP
- Gravita India Limited
- Hindustan Plastic
- B R Plastic Industries Private Limited
- Halifax Greentech LLP
- Sri Chakra Polyplast India Pvt Ltd.
- Reliance Industries Limited
- Indo Rama Synthetics (India) Limited

Report Scope:

In this report, the India Plastic Recycling Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□ India Plastic Recycling Market, By Type:

- o Polyethylene Terephthalate
- o Polyethylene
- o Polypropylene
- o Polyvinyl Chloride
- o Polystyrene
- o Others

□□ India Plastic Recycling Market, By Source:

- o Bottles
- o Films
- o Fibers
- o Foams
- o Others

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☐☐ India Plastic Recycling Market, By Method:

- o Thermal
- o Chemical
- o Mechanical
- o Landfill

☐☐☐ India Plastic Recycling Market, By End User:

- o Packaging
- o Building & Construction
- o Textile
- o Automotive
- o Electrical & Electronics
- o Others

☐☐ India Plastic Recycling Market, By Region:

- o West India
- o North India
- o South India
- o East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Plastic Recycling Market.

Available Customizations:

India Plastic Recycling Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

☐☐ Detailed analysis and profiling of additional market players (up to five).

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Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-02-21"/>
		Signature	<input type="text"/>