

India Biaxially Oriented Polypropylene Film Market Assessment, By Film Thickness [Below 15 Micron, 15-30 Micron, 30-45 Micron, Above 45 Micron], By Application [Food and Beverages, Tobacco, Medical and Pharmaceutical, Industrial, Others], By Region, Opportunities and Forecast, FY2018-FY2032F

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Report description:

India biaxially oriented polypropylene (BOPP) film market is expected to grow at a CAGR of 5.46% during the forecast period FY2025-FY2032. The market size will grow from USD 1.46 billion in FY2024 to USD 2.23 billion in FY2032. The Indian BOPP film market is driven by several key factors that are responsible for its growing demand across multiple industries. One prominent driver is the increasing need for flexible and sustainable packaging materials. BOPP films are widely used for packaging food products, consumer goods, and e-commerce parcels due to their high barrier properties, which protect against moisture, oxygen, and contaminants. These properties ensure that packaged products remain fresh and maintain their quality during storage and transportation.

In addition, the flexibility of BOPP films makes them ideal for the packaging industry. These films are easy to laminate and print, making them perfect for branding and labeling. BOPP films are also technically recyclable, aligning with the global shift toward sustainable packaging materials. This eco-friendly attribute appeals to environmentally conscious consumers and organizations striving to reduce their carbon footprint. Furthermore, the e-commerce industry's rapid growth has significantly boosted demand in the Indian BOPP film market. As e-commerce expands aggressively in India, there is increasing demand for durable and cost-effective packaging solutions. Overall, the combination of sustainability, flexibility, and strength positions BOPP films as the preferred choice for packaging and labeling across most industries in India.

In May 2024, IKEA collaborated with Rhenus to boost home delivery in the Delhi-NCR region. The cooperation will establish a warehouse facility in Gurugram capable of holding and fulfilling over 7000 goods, assuring seamless doorstep delivery. This strategic development allows IKEA to fulfill the majority of orders within 24 hours while enhancing flexibility and streamlining supply chain costs. In addition to this, in January 2024, IKEA's announced e-commerce expansion in India, which will be launched

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throughout 62 districts in Maharashtra, Karnataka, Telangana, and Andhra Pradesh.

Rising Demand for Flexible and Sustainable Packaging Fueling the BOPP Film Demand in India

The growing demand for packaging significantly drives India's need for Biaxially Oriented Polypropylene (BOPP) films. These films are gaining popularity due to their eco-friendly credentials, including recyclability and a reduced environmental footprint, positioning them as a sustainable alternative to traditional packaging materials. This shift is fueled by rising consumer awareness, stricter regulations, and corporate initiatives to tackle plastic waste. BOPP films offer superior barrier properties against moisture and oxygen, extending the shelf life of packaged goods. Their flexibility allows them to be used in diverse packaging formats, such as stand-up pouches and vacuum-sealed bags, catering to the evolving needs of packaged foods, e-commerce, and retail sector. Additionally, India's booming e-commerce industry, propelled by increasing internet access and online shopping trends, is further boosting demand for durable yet lightweight packaging materials like BOPP films.

In March 2024, TOPPAN Inc. and India-based Toppan Speciality Films Private Limited developed GL-SP, a barrier film using biaxially oriented polypropylene (BOPP) as the substrate. GL-SP is a new addition to the range of products for sustainable packaging and a new addition to the TOPPAN Group's GL BARRIER1 series of transparent vapor-deposited barrier films, which are popular in the global market. The product will be launched in April for dry content packaging in the Americas, Europe, India, and the ASEAN region. GL-SP is the first product from TOPPAN Group to have an end-to-end process from substrate BOPP film manufacture to barrier film production, enabling stable quality control and reduced development timelines, lead times, and costs.

Growing Indian Fast-Moving Consumer Goods (FMCG) Market in India

BOPP films are extensively employed in flexible packaging due to their improved properties, such as strength, clarity, and higher barrier performance. The growing need for packaged food, personal care, and pharmaceuticals drives the demand for efficient and innovative packaging solutions, in which BOPP films play a key role. Additionally, India's increasing middle class, urbanization, and changing consumer patterns have led to a surge in the application of packaging products. This has opened up enormous opportunities for the producers of BOPP films to cater to the FMCG sector. The rise in e-commerce has further boosted the demand for light and strong packaging products like BOPP films. The sector is also witnessing the development of production technologies to manufacture sustainable and recyclable BOPP films. These developments are accompanied by consumer awareness of the need for environmentally friendly packaging materials.

In July 2024, Reliance Industries plans to invest around USD 4.7 billion in its fast-moving consumer goods division to strengthen its position against major players like Hindustan Unilever, ITC, Coca-Cola, and Adani Wilmar. During an extraordinary general meeting, the board approved special resolutions to raise capital for business operations. The expansion is part of Reliance's strategy to double its value by 2027, the year the company celebrates its 50th anniversary.

Food and Beverages Sector is the Leading Application in BOPP Films

The BOPP films are extensively employed in flexible packaging due to their improved properties, such as strength, clarity, and higher barrier performance. The growing need for packaged food, personal care, and pharmaceuticals is driving the demand for efficient and innovative packaging solutions, in which BOPP films are playing a key role. Additionally, India's increasing middle class, urbanization, and changing consumer patterns have led to a surge in the application of packaging products. This has opened up enormous opportunities for the producers of BOPP films to cater to the FMCG sector. The rise in e-commerce has further boosted the demand for light and strong packaging products like BOPP films. The sector is also witnessing the development of production technologies to manufacture sustainable and recyclable BOPP films. These developments are accompanied by consumer awareness of the need for environmentally friendly packaging materials.

The food and beverage sector are major contributors for BOPP films' use, driven by their superior characteristics and versatility. BOPP films are widely used in the food industry for packaging items such as snacks, bakery products, confectionery, frozen foods, and ready-to-eat meals. These films offer excellent barrier properties that prevent food from meeting moisture, oxygen, and dirt, thus extending shelf life and preserving freshness. Additionally, their transparency enhances the aesthetic appeal of shelf displays, while their high printability supports strong brand imaging and clear product presentation. In the beverage industry, BOPP films are used for packaging, as well as labeling bottled water, soft drinks, and spirits. Their flexibility and clarity allow them to be crafted into thin labels that adhere seamlessly to bottle surfaces and contours. The growing demand for convenience foods and eco-friendly packaging solutions further promotes BOPP film adoption in this sector. Lightweight, recyclable, and cost-effective, BOPP films align with industry demands for environmental sustainability.

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In March 2024, Uflex limited launched 'B-UUB-M' Outstanding Barrier Metallized BOPP Film that is used for packaging dry fruits, beverages, chips, snacks, biscuits, cookies, and other confectionery and chocolates. Its long-term freshness and quality preservation are assured by its oxygen transmission rate (<0.1cc/m²/day) and moisture barrier (<0.05 gm/m²/day). It also offers a barrier to seal the aroma and migration. Additionally, its strong metal adhesion, chlorine-free PVDC-coated film, and ability to replace aluminum foil position it as a versatile and sustainable solution. The material also supports high-speed processing, enhancing production efficiency.

Challenging Demand-Supply Imbalances for BOPP Films in the Domestic Market Leading to Ongoing Pricing Pressures

The Indian packaging film sector, particularly for BOPP films, is facing significant challenges due to demand-supply imbalances and ongoing pricing pressures. The industry has experienced substantial capacity additions, with BOPP film makers also increasing their production capabilities. However, domestic demand has not kept pace with these expansions, leading to a supply glut and reduced profitability for manufacturers. Weak export demand has further exacerbated these challenges. Exports, which typically account for a substantial portion of industry revenue, have been hampered by economic slowdowns in key markets such as Europe and the United States. This decline in export demand has intensified profitability challenges, as companies grapple with maintaining revenue levels amid subdued pricing power. Compounding the issue, an oversupply in the market has led to significant pricing pressures, resulting in declining revenues and operating margins contracting to historically low levels. Further, low prices from China (import) increase the price delta between the domestic price and the import price from China, thus resulting in low profit margin for BOPP producers. Despite these current challenges, there is potential for improvement in the future. With no major capacity additions expected in the near future, the demand-supply balance could stabilize, potentially leading to price increases as demand gradually increases. The rise in e-commerce and the growth of the FMCG sector are also expected to drive demand for flexible packaging solutions, offering opportunities for recovery and growth.

In August 2024, JPFL Films, a subsidiary of Jindal Poly Films Limited, announced a capacity expansion with a new BOPP line in Nashik, Maharashtra, India. The new line is expected to be commissioned in the second half of FY 25-26, with an investment of around USD 29.7 million. The expansion is part of JPFL Films' strategy in the BOPP segment, aiming to increase market share amidst supply-demand imbalances and ongoing pricing pressures. The line can produce high-OD rolls up to 1,700mm, optimizing efficiency for downstream processes such as metalizing.

Future Market Scenario (FY2025 □ FY2032F)

□□The Indian BOPP film market is well-positioned to benefit from rising demand for eco-friendly packaging solutions. BOPP films, being recyclable and lightweight, offer a greener alternative to metal and glass-based packaging, aligning with stricter environmental regulations and industry shifts toward sustainability.

□□Government initiatives like the Pradhan Mantri Kisan SAMPADA Yojana (PMKSY) and PM Formalisation of Micro Food Processing Enterprises (PMFME) are accelerating growth in India's food processing sector. This growth will directly boost demand for BOPP films in food packaging, as their moisture barrier properties and ability to extend shelf life are critical for preserving product quality.

□□India's rapidly expanding e-commerce sector continues to drive demand for flexible packaging materials like BOPP films. These films are ideal for online product packaging due to their puncture resistance and tamper-evident features, ensuring safe delivery and enhancing consumer trust.

□□Technical innovation in BOPP film like enhanced barrier, and application beyond conventional packaging shall further enhance market growth opportunities.

Key Players Landscape and Outlook

Market players in the Indian BOPP film industry are emphasizing sustainability by introducing recyclable and biodegradable films to meet increasing consumer demand and comply with stricter environmental regulations. The industry is dominated by large-scale companies that implement strategic initiatives such as expanding production capacity, adopting advanced manufacturing technologies, and forming partnerships to strengthen their market share. To address the rising demand for flexible packaging solutions in sectors like food and beverage, e-commerce, and retail, these companies are investing in next-generation technologies. These innovations enable the production of high-performance BOPP films with enhanced barrier properties, optical clarity, and sealing efficiency.

Sustainability remains a priority, with manufacturers introducing recyclable and biodegradable films to align with consumer

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preferences and regulatory requirements for eco-friendly packaging. Additionally, companies are diversifying their product portfolios to cater to specialized applications such as tapes, labels, wraps, and pouches. Strategic moves like acquisitions, partnerships, and new production line installations further improve operational efficiency and market penetration. India's low production costs also provide a competitive advantage, encouraging market leaders to scale operations and expand export potential.

In October 2024, SRF Limited's board approved the establishment of a BOPP-BOPE film manufacturing facility in Indore, India. This initiative enables the company to expand its existing BOPP film offerings while entering the BOPE substrate market. The project aligns with the company's sustainability goals, as polyolefin-based substrates like BOPP and BOPE are recognized for their eco-friendly advantages, including single-material composition and recyclability. The investment for the project is approximately USD 52.0 million, with an expected completion timeline of 25 months.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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