

India Rigid Plastic Packaging Market Assessment, By Type [Polyethylene, Polyethylene Terephthalate, Polypropylene, Polystyrene, Expanded Polystyrene, Polyvinyl Chloride, Others], By Process [Extrusion, Injection Molding, Blow Molding, Thermoforming, Others], By Product [Bottles and Jars, Trays and Containers, Caps and Closures, Intermediate Bulk Containers, Drums, Pallets, Other], By End-user Industry [Food and Beverages, Healthcare, Cosmetics and Personal Care, Automotive, Building and Construction, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

Indian rigid plastic packaging market is expected to grow at a CAGR of 5.45% during the forecast period FY2026-FY2033. The market size will grow from USD 12.89 billion in FY2025 to USD 19.71 billion in FY2033. India rigid plastic packaging market is driven by several key drivers behind its strong market presence. Increasing disposable incomes are one of the prime drivers, with consumers spending increasing amounts of money on packaged products such as food, beverages, personal care, and household goods, leading to an increasing demand for robust packaging solutions. Urbanization and Changing Consumer Preferences also drive the market, with urban areas being the demand leaders because of rising disposable incomes and changing consumption patterns. Furthermore, the fast-moving consumer goods (FMCG) is a key driver of India's rigid plastic packaging market and is playing a significant role in fueling the market's high growth rate. Increasing demand for lightweight and robust packaging

materials such as bottles, jars, and food containers is fueled by the growth in consumption of packaged food, beverages, and personal care products. Rigid plastic packaging ensures product safety, shelf life, and convenience and thus it is a requirement for FMCG business.

In January 2024, Mold-Tek Packaging Limited (MTPL), India's rigid plastic packaging company, opened three manufacturing plants in Panipat, Cheyyar, and Sultanpur, with an investment of over USD 14 million. The combined plant capacity is 5,500 tons per annum. Additionally, MTPL acquired land in Mahad, Maharashtra, to establish a plant for pail supplies to M/s Grasim Industries, with a production capacity of 1,500 tons per annum. The plants will serve Grasim Industries, an Aditya Birla Group company, and will also produce Food & FMCG and Square Packs. The expansions are expected to boost MTPL's total manufacturing capacity to 54,000 tons per annum by the end of FY2025.

Growing Demand from FMCG and Food Sectors

The prominent drivers for rigid plastic packaging industry are growing need for packaged goods and fast-moving consumer goods (FMCG) since these organizations have to pack products that are light and stiff, as well as cost-saving in nature because they cater to the growing desire for convenience as well as easy-to-consumer products. Rigid plastic packaging provides added protection, longer shelf life, and easy shipping and transportation, thus ideal for packaging processed food, beverages, and personal care products. Nonetheless, lifestyle changes and consumer desire for branded and clean packaged products have greatly fueled the demand for specialty packaging solutions to meet the specific needs of these industries.

Apart from this, the interest of the FMCG sector in ensuring the safety and quality of the product has created the need for packaging materials that are effective even under adverse conditions of the environment and do not compromise the quality of the content. Rigid plastic packaging does exactly this, preserving the safety and freshness of goods from the manufacturing to the consumption level. As there are shifting consumer habits with an increasing emphasis on wellness and health, demand for safe and secure packaging will also be on the rise, hence boosting the rigid plastic packaging market further. For instance, in February 2025, Dabur India announced its plans to invest USD 66 million in Madhya Pradesh over the next two years, to expand installed capacities, including filling and manufacturing lines. Such initiatives will result in the increased demand for the target product.

Expansion of E-commerce and Retail Channels

The expansion of e-commerce and new retailing channels has been one of the most significant drivers for the rigid plastic packaging market. With increasing retail websites' penetration online, there is a higher demand for secure and safe packaging that can get the product delivered without any damage during shipping. Rigid plastic packaging is the optimum choice for this specification since it provides adequate protection against environmental conditions such as moisture, shock, and contamination. This is important in e-commerce, where products are being shipped over long distances and must survive compromised handling conditions. Further, increasing the number of organized retail outlets has made packaging products more conspicuous, thus triggering manufacturers to put money in packaging designs that are both effective and attractive, a move meant to attract buyers' attention. E-commerce expansion along with evolving shopping trends are equally maintaining rigid plastic packaging demand in most sectors. As consumer demands for visually appealing, safe, and easy packaging continue to rise, business firms are placing bets on novel packaging solutions that not only protect products but enhance brand value as well as customer experience. The trend will be followed and, as such, the market for rigid plastic packaging will expand in line with the evolving demands of both offline and online shopping channels.

For instance, in May 2024, IKEA partnered with Rhenus to improve its distribution in Delhi NCR region. It has established a warehouse facility which has over 7000+ products. Further in January 2024, IKEA announced to launch its e-commerce services in the 62 districts in Maharashtra, Karnataka, Telangana and Andhra Pradesh. Such increase in e-commerce activities will propel the demand for rigid plastic packaging.

Bottle Manufacturing is Witnessing the Robust Growth in India Rigid Plastic Packaging Market

India rigid plastic packaging market is witnessing high growth in the production of bottles, driven by increasing demand from industries such as food, beverages, and pharmaceuticals. Plastic bottles have the large share in the market because they are cost-effective, resistant, and have multiple applications. Polyethylene terephthalate (PET) bottles are recyclable, non-breakable, and lightweight, making them a highly sought-after product for packaged drinking water, carbonated drinks, and cosmetics. Increased consumption of packaged drinking water and non-alcoholic drinks has been the prime reason for the growth. Advanced manufacturing technology has also assisted in the production of PET bottles with added value attributes such as UV stability and

oxygen barrier to satisfy brand-specific demands. These factors have made the production of bottles the leading segment in the rigid plastic packaging sector.

Sustainability trends are impacting India's bottle production sector as well. The sector is moving towards the use of recycled PET (rPET) more in a bid to achieve green goals and reduce reliance on virgin material. Cases like the introduction of 100 rPET bottles by major beverage firms are an indicator in the direction of circular economy operations. Along with this, partnerships between manufacturers and recycling firms are driving innovation in green packaging solutions.

For instance, in June 2023, Coca-Cola India announced about its launch of Kinley Bottles which are made of 100% rPET material. These bottles are made of food-grade rPET which is approved by the Indian as well international institutions, such Food Safety and Standards Authority of India (FSSAI), U.S. Food and Drug Administration (FDA) and European Food Safety Authority (EFSA).

Indian West and Central Region Dominating the India Rigid Plastic Packaging Market

India's west and central parts are the predominant forces of the new market for rigid plastic packaging, with the advantage of location and growing industrial capacity. They are well-resourced with established production centers, good infrastructure, and access to large consumer markets, which is appropriate for extensive production and distribution operations. The coexistence of various industries, such as FMCG, food and beverages, pharma, and automotive, has led to long-term demand for rigid plastic packaging solutions. The proximity to raw material and easy availability of trained staff also add to the rise of the packaging industry in these areas. Urbanization with rapid growth and increase in e-commerce in these markets has also contributed significantly in market dominance. Increasing use of packaged goods in cities has stimulated demand for lightweight yet tough packaging material, and rigid plastic packaging has served this purpose exceptionally well. Moreover, government initiatives to encourage industrial development and investments in the manufacturing sector further made central and western India dominant players in the marketplace. Owing to ongoing innovations in technology and the focus on sustainability by using recycled plastics, these two regions are expected to remain at the forefront of innovation and expansion in the rigid plastic packaging market.

For instance, in February 2024, Pyramid Technoplast Ltd. acquired 10 acres of land in Wada, Palghar district, for USD 1.44 million. The company plans to set up a new manufacturing unit in three phases over four to five years to increase production capacity across polymer drums, intermediate bulk containers (IBC) segments.

Future Market Scenario (FY2026 - FY2033F)

As concern for the environment keeps increasing, the market for green packaging products is projected to grow. Increasingly, companies will have their focus on utilizing recycled materials such as rPET and biodegradable products as substitutes for traditional plastics, thus stimulating the market towards growth and development.

India's e-commerce and organized retailing sectors are expected to further drive the demand for rigid plastic packaging. The market requires strong and durable packaging materials so that the goods can be transported in a safe manner, thereby growing the market further.

Technological innovation in packaging, such as improved barrier performance and smart packaging, will enhance product safety and shelf life. This innovation will attract more industries to rigid plastic packaging, propelling the market.

Government initiatives to develop industrial infrastructure and manufacturing will fuel the development of the rigid plastic packaging industry. Better logistics and transport infrastructure will enable more effective supply chains, which will facilitate the easier handling of rising demand for companies.

Key Players Landscape and Outlook

India rigid plastic packaging market is marked by high competition and fragmentation with a number of players competing for market space. Innovation, utilization of advanced technologies, and product portfolio development to address changing consumer needs across industries such as FMCG, food and beverages, and pharma are the techniques that companies are adopting to gain the market share. Mergers and acquisitions, joint ventures, capacity expansions, etc., are employed to consolidate market positions in general. R&D spends are also propelling the induction of green, sustainable, and eco-friendly packaging solutions in accordance with increased green responsibility considerations. Regional capacity expansions to make supply chains efficient and better positioned to address diverse customer requirements are also propelling the competitive scenario.

For instance, in November 2024, Asia-Pacific focused company PAG announced its plan to acquire a majority holding in India's rigid plastic packaging solutions company Manjushree Technopack Ltd for about USD 990 million. Acquisition of Manjushree Technopack Ltd's stacks will be PAG's third billion-dollar deal in the year 2024 and the largest that it has acquired in India.

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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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