



# Insights Report Small Formats and Sachets

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# Introduction

Plastic consumption has grown severalfold over the years: India's plastic demand increased from less than one million tonnes in 1990 to nearly 21 million tonnes in 2021, an increase of nearly 23 times.<sup>1</sup> Plastics have become an important part of our daily lives and find applications in most industries, including packaging, where the consumption of plastics is significant. Due to their light weight, low cost of production, better barrier properties and versatility, plastics have become the preferred material for packaging: data suggests that plastics are preferred over other materials such as glass and paper, with a revenue share of 64%.<sup>2</sup> In India, nearly 60% of plastic consumed goes into packaging.<sup>3</sup>

Globally, the fast-moving consumer goods (FMCG) sector is one of the largest consumers of plastic packaging. This sector is characterized by low-cost, non-durable, high-demand products including shampoos, juices, toiletries and packaged snacks. Affordability and easy accessibility both contribute to large sales volumes of these products and coupled with short product-use lifetimes, lead to large quantities of waste from the FMCG sector ending up in municipal waste streams.

The easy accessibility and high littering potential of FMCG products, and their packaging, have led to the sector being called the 'predominant force behind the throwaway economic model driving the plastic pollution crisis.'<sup>4</sup> It is therefore evident that better management of FMCG packaging waste is critical to tackling plastic pollution; however, several aspects should be factored into approaches and interventions, including packaging format (rigid or flexible), polymer used, size of units sold and type of products being packaged.

While it is known that flexible formats, in general, and small formats, in particular, are extremely popular and widely used in the Indian context, what remains unclear is the share of

- flexible packaging within the FMCG sector, and,
- small formats and sachets as a subset of flexible packaging.

Currently, flexible packaging is not recycled at scale in India and often ends up being littered, sent for incineration or sent to landfills. Small format packaging is especially prone to being littered because it is difficult to recycle and there is little value at end-of-life. A lack of end-markets for such packaging waste translates into poor collection rates by waste pickers.

<sup>1</sup> Plastindia Foundation. (2022). Plastics Industry Status Report – India – 2021-22. <https://www.plastindia.org/upload/pdf/PlasticsIndustryStatusReport.pdf>

<sup>2</sup> Alam, T. (2021). The Indian packaging industry: post covid-19 as an opportunities in packaging business. Presentation. <http://missp.ch/docs/1590652928The%20Indian%20Packaging%20Industry%20-%20Post%20Covid-19%20as%20an%20opportunities%20in%20Packaging%20Business.pdf>

<sup>3</sup> Plastindia Foundation. (2019). Indian Plastics Industry Report 2019. Retrieved from <https://www.plastindia.org/plastic-industry-status-report.php>

<sup>4</sup> Greenpeace. (2022). A crisis of convenience - The corporations behind the plastic pollution pandemic. [https://www.greenpeace.org/static/planet4-malaysia-stateless/2019/04/be6fbb8b-crisis\\_of\\_convenience\\_final.pdf](https://www.greenpeace.org/static/planet4-malaysia-stateless/2019/04/be6fbb8b-crisis_of_convenience_final.pdf)

To create a circular economy for plastics, it is essential to address the challenge posed by small format packaging. Eliminating these, especially sachets, is not a viable option: in developing countries such as India, many consumers prefer sachets as they can only afford to buy small quantities at a time. Hence, it is critical that interventions do not increase price points.

This insights report aims to address these challenges and propose systemic solutions by

- understanding the landscape of FMCG small format and sachet packaging with respect to consumption patterns,
- developing a framework for improving the management of such waste, and
- using the framework to identify possible interventions and focus areas.

These objectives will be met in two phases.

- **Phase I:** data on FMCG product sales is procured and analysed to derive high-level inferences on the current landscape of small format and sachet packaging. A framework is developed to help identify interventions for improving the management of waste generated from these packaging formats.
- **Phase II:** a deeper analysis of data is carried out to derive detailed insights into the consumption of small format and sachet packaging and to identify challenges associated with the management of such packaging at end-of-life. The data will then be used to identify priority areas or products to address, and suitable interventions will be suggested.

**Phase I is covered in this insights report.**

# Use of plastics in the FMCG sector



In 2021-22, India consumed nearly 21 million tonnes of plastic, making it the largest consumer of plastics in the world, after China and the United States of America. The per capita plastic consumption in India (15 kg) is lower than the global average (32 kg) and is small compared to the per capita consumption in countries such as the USA (112 kg) and China (62 kg).<sup>5</sup> However, as income and quality of life improves in the country, the per capita consumption is expected to rise.

It has been estimated that of the total plastics consumed, 12 million tonnes (59%) was used for packaging, making it the single-largest end-application of plastics in India.<sup>6</sup> The FMCG sector, which is the fourth-largest sector in the Indian economy,<sup>7</sup> contributes about 75% of the total revenue of the plastic packaging industry.<sup>8</sup> It should be noted that the share in terms of quantum of plastic packaging used in the FMCG sector may be either lower or higher than this percentage.

India's FMCG sector has been steadily growing over the years, with revenue reaching USD 110 billion in 2020. In the coming years, the sector is expected to grow further due to changing lifestyles and easier accessibility. The growing e-commerce segment is expected to drive demand for FMCG products, especially in rural areas where disposable income is on the rise.<sup>9</sup>

FMCG products in India are very diverse, but they can be broadly clubbed into three segments:

- **Food and beverage (F&B):** include packaged food such as biscuits, breakfast cereals, confectionary and savoury snacks; staples such as pulses, cereals, dairy, edible oils and fats; and beverages such as bottled water, soft drinks and juices.
- **Home and personal care:** include products such as hair care, skin care, dishwash, and detergents.
- **Consumer health:** includes products such as vitamins and dietary supplements, baby food, and herbal/traditional products.

A 2015 study (Figure 1) showed that the F&B segment contributed about 89% of the sector's revenue, while the home and personal care, and consumer health segments contributed only 9% and 2%, respectively.<sup>10</sup> The study also stated that the majority of product sales is from unbranded products (~66%) (all retail sales that are not sold under a brand). Product categories which have a high share of unbranded sales include pulses, cereals, dairy, edible oils and fats, all of which are often sold loose in India. These are also categories which are not commonly associated with small formats. Figure 1 shows the relative share of each product category (including branded and unbranded) in the overall FMCG sector sales in 2015.

<sup>5</sup> Plastindia Foundation. (2022). Plastics Industry Status Report – India – 2021-22. <https://www.plastindia.org/upload/pdf/PlasticsIndustryStatusReport.pdf>

<sup>6</sup> CII analysis based on Plastics Industry Status Report – India – 2021-22 by Plastindia Foundation (2022) and Indian Plastics Industry Report 2019 by Plastindia Foundation (2019)

<sup>7</sup> IBEF. (2022). Fast Moving Consumer Goods (FMCG). [https://www.ibef.org/download/1664768056\\_fmkg-august-2022.pdf](https://www.ibef.org/download/1664768056_fmkg-august-2022.pdf)

<sup>8</sup> Strategy& and FICCI. (2015). Plastic Packaging – the sustainable and smarter choice. <https://fikki.in/spdocument/20573/Plastic-Packaging-the-sustainable-and-smarter-choice.PDF>

<sup>9</sup> IBEF. (2022). Fast Moving Consumer Goods (FMCG). [https://www.ibef.org/download/1664768056\\_fmkg-august-2022.pdf](https://www.ibef.org/download/1664768056_fmkg-august-2022.pdf)

<sup>10</sup> BCG and CII. (2015). Re-Imagining FMCG in India. <https://media-publications.bcg.com/india/Re-Imagining-FMCG-in-India.pdf>

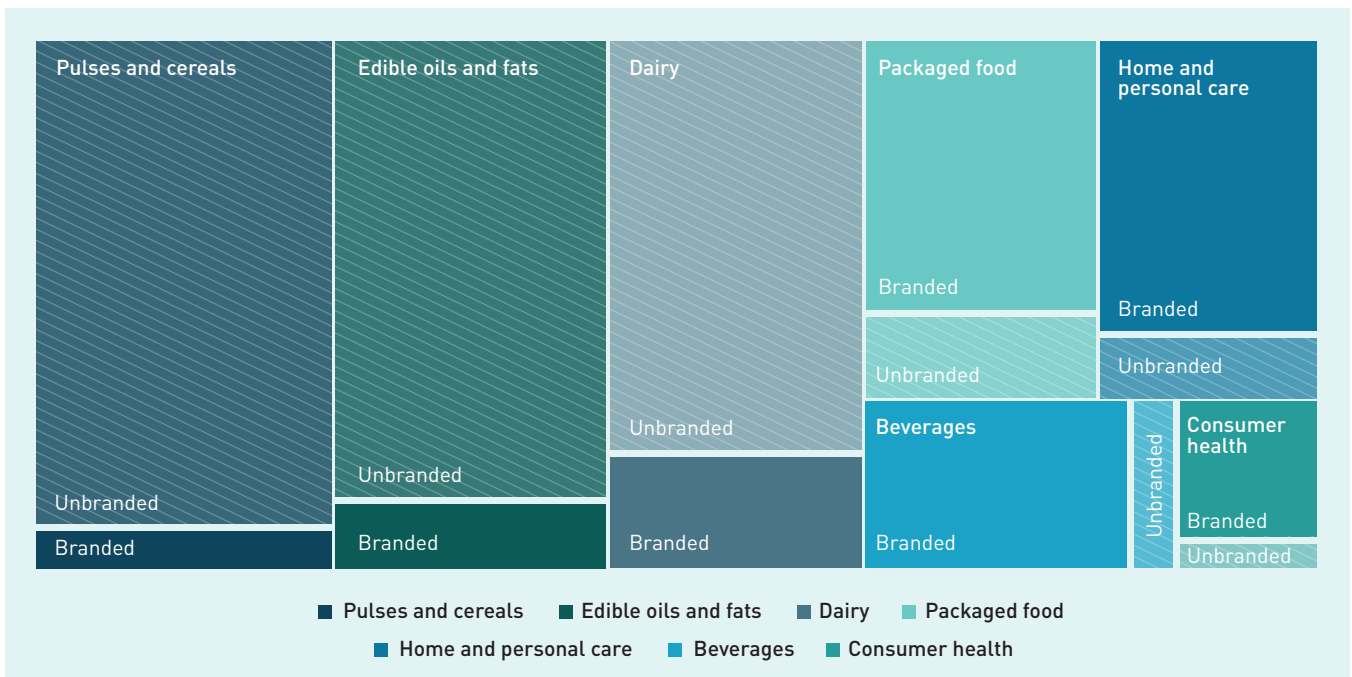


Figure 1: Relative share of different product categories in FMCG sector revenue (2015)

While materials such as glass, paper and tin are also used to package FMCG products, a large share of products is packaged in plastics. Some products, such as biscuits, dried processed food items and hair care products are almost exclusively packaged in plastics (>97%).<sup>11</sup>

It is known that 72% of plastic packaging consumed in India is in flexible formats, however, the corresponding figure for the share of flexible formats in FMCG products is not publicly available. Flexible formats offer several advantages over rigids including lighter weight, higher product-to-package ratio and lower price points (especially for small and medium enterprises). Flexible packaging is also better suited to small format packaging.

These formats, especially sachets, are typically used to sell small or single portions of a wide variety of FMCG products. In developed nations, sachets are mostly used to pack samples and for on-the-go applications. However, in India and in

many other developing nations, small format packaging is aimed at low-income households with a limited disposable income: they allow access to branded products, serve the rural market, and allow consumers to control portion sizes.

Sachets were considered a disruptive innovation when they were first introduced in the 1980s. This was a time when daily-use products such as shampoos and lotions were considered luxury items and were only sold in larger pack sizes at high price points. Chinni Krishnan, a resident of Cuddalore, Tamil Nadu, who ran a pharmaceuticals business, invented sachet packaging to make such products affordable for the rural market. CavinKare, a company owned by his son, was the first to sell shampoos in sachets under the brand name, Chik.<sup>12</sup> These sachets revolutionized rural retail markets, and brand owners now had a way to tap into a population that constituted up to 74% of India's population at that time.<sup>13</sup>

<sup>11</sup> Strategy & and FICCI. (2015). Plastic Packaging – the sustainable and smarter choice. <https://fikki.in/spdocument/20573/Plastic-Packaging-the-sustainable-and-smarter-choice.PDF>

<sup>12</sup> Rajan, R.V. (2021). The man behind the sachet revolution in India. Madras Musings. <https://www.madrasmusings.com/vol-30-no-17/the-man-behind-the-sachet-revolution-in-india/>

<sup>13</sup> Government of India (1993). Census of India, Series-1, Paper 2 of 1992- Final Population Totals - Brief Analysis of Primary Census Abstracts. <https://censusindia.gov.in/nada/index.php/catalog/33139>



Today, sachets are immensely popular in other developing countries, such as Indonesia, the Philippines and Sri Lanka. In the Philippines, nearly 60 billion sachets are consumed every year.<sup>14</sup> Over the years, many more products have been marketed through sachets, such as soaps, oils, skin creams, ketchup and coffee. Besides affordability, sachets are also favoured for use in on-the-go applications where small portions maintained in hygienic condition are necessary, such as in the hospitality sector, and for catering in the railways and airlines.

While the small formats' role in serving rural markets is undeniable, they present a significant challenge in terms of waste management. Small formats are typically made of flexible, multilayer plastics (either a combination of different polymers or a combination of polymer and metal foil, both difficult to separate) and are not amenable to recycling at scale, with technology available at present.

Another challenging aspect of their use is posed by their small size, light weight and high volume of sales, which lead to inefficient waste collection. Once littered, they are hard to collect, sort, aggregate, and transport, because they do not fetch a price worth the effort. If collected at all, they are sent to landfill or cement kilns in the absence of viable end-markets.

The India Plastics Pact has identified small format packaging as an area that needs to be understood better to unlock the Pact's ambitious goal of creating a circular plastics economy. An analysis of market data on sales of FMCG products will provide insights into consumption patterns, which can help develop focused solutions, accounting for not just the packaging composition but also demographic factors, products and behavioural aspects.

<sup>14</sup> GAIA. (2019). Plastics Exposed: How Waste Assessments and Brand Audits are Helping Philippine Cities Fight Plastic Pollution. <https://www.no-burn.org/wpcontent/uploads/Plastics-Exposed-2nd-Edition-Online-Version.pdf>

# Market data on small formats: analysis



## Data

Market data on sales of major FMCG products were purchased from the marketing research company, Nielsen IQ (Nielsen Consumer LLC).

The dataset available with Nielsen consists of 71 FMCG product categories which cover almost all products placed-on-market as FMCG. Based on informal consultations with stakeholders across the value chain, and high-level market data on all 71 products, 29 products were identified (listed in Table 1) for which detailed information (elaborated in subsequent paragraph) was procured. In 2021, these 29 products accounted for 70% to 75% of sales value of the 71 products.

Data were procured for the urban and rural markets<sup>15</sup> for the years 2019, 2020 and 2021 on the following parameters:

- packaging format used,
- number of units sold,
- weight (for solids) or volume (for liquids) of product sold, and,
- sales value.

Nielsen collects this data from sample stores across the country and extrapolates it to represent country-level sales. Detailed methodology used by Nielsen is presented in Annex 1.

## Limitations

- Some underestimations may have occurred because the data set includes only products that are: a) packaged, b) branded, and c) have 'marketed by' printed on the label. This implies that a product not meeting all these conditions (such as those sold loose, or unbranded or without a 'marketed by' printed) are not covered.
- Reported data refer to the product's outer packaging: in cases where two or more materials/formats are used, only the outer packaging is reported. For instance, toothpastes are packaged in plastic tubes which are placed in cardboard boxes. The data account for only the cardboard box. To make the dataset more accurate, an attempt was made to reassign packaging formats in selected products (details in 'Data cleaning' section below).
- The terms used for packaging formats (can, jar, pouch, for example) by Nielsen, are not always the same as those used in the plastic packaging industry. These terms have been aligned to better reflect the terminology used in industry; this change in nomenclature is not likely to have a major impact on the report's findings.

<sup>15</sup>While Nielsen IQ uses the Census of India's definition of 'Urban', it considers all areas/settlements other than 'Urban' as 'Rural'.

# Definitions

Definitions of the terms ‘small format packaging’ and ‘sachets’ are based on interviews with packaging producers, brand owners and retailers. The following working definitions have been used in this insights report:

*Small format packaging refers to packaging containing upto 50 grams of solid product, or upto 50 ml of liquid product.*

*Sachet packaging refers to packaging containing upto 10 grams of solid product, or upto 10 ml of liquid product.*

Thus, sachets are a subset of small formats.

# Data cleaning

Steps taken to clean the raw data procured from Nielsen are elaborated below.

- Changes in nomenclature
- The packaging material used was identified: for plastic packaging, a differentiation between flexible and rigid forms was made.
- For three products, packaging formats were reassigned: biscuits, packaged ghee and

toothpastes. A significant portion of units of these three products were reported as packaged in cardboard boxes. However, these products are typically packed in plastic first and then placed inside cardboard boxes. Biscuits and ghee are packed in plastic pouches and toothpaste is packed in plastic tubes. While this may or may not be true for some other products also, such as toilet soap and skin cream, the reassignment was limited to these three products because their primary packaging is always plastic.

- Product-level data was classified into six size classes based on the pack size (weight or volume of packaged product)
  - up to 10 g or 10 ml (sachets)
  - 10 g or 10 ml to 50 g or 50 ml
  - 50 g or 50 ml to 250 g or 250 ml
  - 250 g or 250 ml to 500 g or 500 ml
  - 500 g or 500 ml to 1,000 g or 1,000 ml
  - greater than 1,000 g or 1,000 ml
- The products were categorised into three segments: food and beverage, personal care, and home care (refer to Table 1 below).

Table 1: Segment-wise classification of the selected 29 FMCG products

Food and beverage	
Milk powder	Ketchup
Instant coffee	Salty snacks
Blended spices	Chocolates
Pure spices	Breakfast cereal
Packaged tea	Biscuits
Packaged pure ghee	Confectionery
Refined oil	Still soft drinks
Non-refined oil	Sparkling soft drinks

Personal care	Home care
Toothpaste	Toilet soaps
Skin creams	Toilet cleaners
Tooth powder	Washing powder
Talcum powder	Floor cleaners
Hair oil	Detergents
Shampoo	Utensil cleaners
Coconut oil	

All references to the 'FMCG sector' or 'FMCG products' in this report refer to these 29 products in the three segments: food and beverage, home care, and personal care. High-level inferences from the data are presented below.

## Analysis

In 2021, 304 billion units of FMCG products were placed on the market. Plastic was the dominant packaging material: 96% of units sold were packaged in plastic, accounting for 90% of overall

FMCG revenue. Of the 29 products, 14 were almost entirely sold in plastic packaging, that is, 99% (or more) of units sold are packaged in plastic (refer to Annex 2 for full list).

Flexible plastic packaging formats such as plastic pouches and wrappers clearly dominated and accounted for 91% of (the 96%) units sold in plastic packaging. Rigid plastic packaging formats such as plastic bottles and jars accounted for the remaining 9%. In terms of sales value, flexibles accounted for 70% of the total sales of FMCG units sold in plastic packaging and rigids accounted for the remaining 30%.

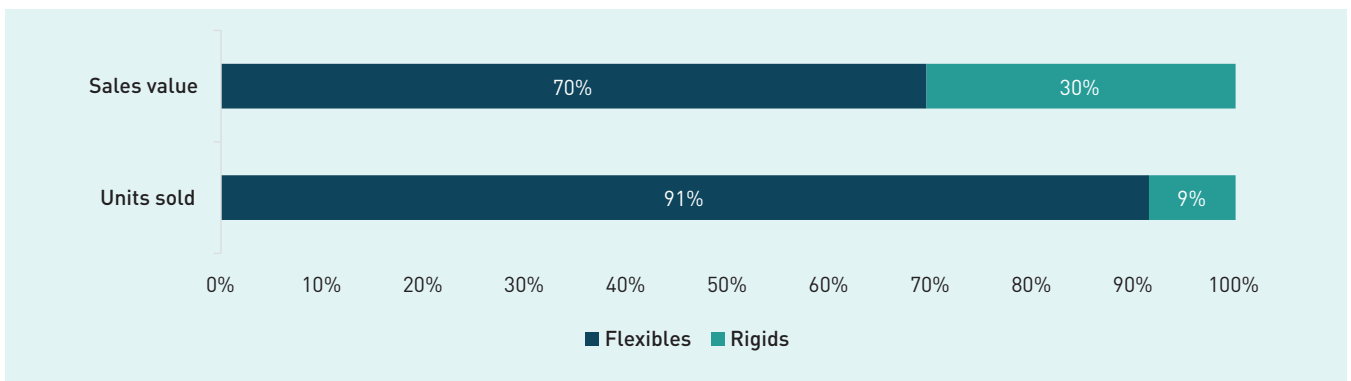


Figure 2: Share of flexible and rigid plastic packaging of all FMCG units in terms of sales value and number of units sold in 2021

The data indicate that products sold in 'plastic pouches' (thin, flexible packaging used to package products such as biscuits, coffee and shampoo) accounted for 87% of all units sold and were therefore the most commonly used packaging format. However, the exact composition of the 'pouch' as monolayer (such as milk pouches) or multi-layer (used for chips, shampoos, coffee, for example) is not known which could have a bearing on the choice and impact of possible interventions. In Phase II, an attempt will be made to understand the relative share of these different types of pouches through consultations with relevant brand-owners.

Three out of four FMCG units sold in the country are in small formats (below 50 g or 50 ml in size), in flexible packaging. Nearly half of these small formats (48%) are sold in the form of sachets (below 10 g or 10 ml in size). It is interesting to note that there was little difference between rural and urban demand for small formats; however, differences at product-level, to be explored in Phase II, may show a different pattern.

While small formats accounted for around 75% of units sold, they made up 28% of the sales value only, suggesting that the cost per unit is lower than that for larger packaging.

Salty snacks (24%), shampoo (19%) and biscuits (15%) together make up about 60% of the products sold in small formats. Shampoo (40%), confectionery (29%) and blended spices (8%) make up 80% of the products sold in sachets.

The food and beverage segment accounts for 69% of all units sold. Personal care accounts for 20% and home care, 11%.

## Food and beverage (F&B)

The share of flexible packaging in the total F&B units sold is 93%, accounting for 73% of the F&B sales value. Three out of four F&B units are sold in small formats (~78%) and a third of these are sold in the form of sachets (~35%). In terms of

contribution to overall F&B sales value, small formats account for only 30%, and only 15% of this is from sachets.

Salty snacks, biscuits and confectionery are the three products which account for the major portion of small format units sold (74%).

Unlike the personal care and home care segments, products in the F&B segment are ingested by consumers. Hence, interventions aimed at this segment must ensure that the hygiene and shelf life of the products are not affected.

## Personal care

The share of flexible packaging in the total units of personal care products sold is 84%, but these make up only 21% of the sales value from this segment: by comparison, for the F&B and home care segments, these figures are 73% and 91%, respectively.

The majority of personal care units is sold in small formats (95%), mostly in the form of sachets (83%).

In terms of number of units, 88% of small formats placed on the market in this category are in flexible packaging and the remaining 12% in rigid packaging. There is a relatively large share of small formats in rigid packaging (as compared to F&B and home care) in this segment. This includes products such as toothpaste, skin cream and hair oil.

In terms of contribution to overall personal care sales value, small formats account for 46%; 41% of this is from sachets.

85% of the small formats sold in the personal care segment are shampoo and hair oil. While the regulations surrounding personal care product packaging are not as stringent as those for food-grade packaging, interventions looking to improve packaging design will have to account for the different safety requirements of products that stay on the skin and those that are rinsed off.

## Home care

Most home care product units are sold in flexible packaging (98%), and make up 91% of the segment's sales value. Among the three segments (F&B, personal care and home care), home care has the least number of units sold in small formats (17%), with only 12% of these sold in the form of sachets.

Toilet soaps and washing powder account for the major portion of the small format units sold (97%). Although the impact of interventions aimed at this segment may not have a large impact because of the low volume of units sold, interventions could be prioritised because there are fewer safety regulations to meet.

Figure 3 below represents the relative share of product units sold across the three segments for the different size classes.

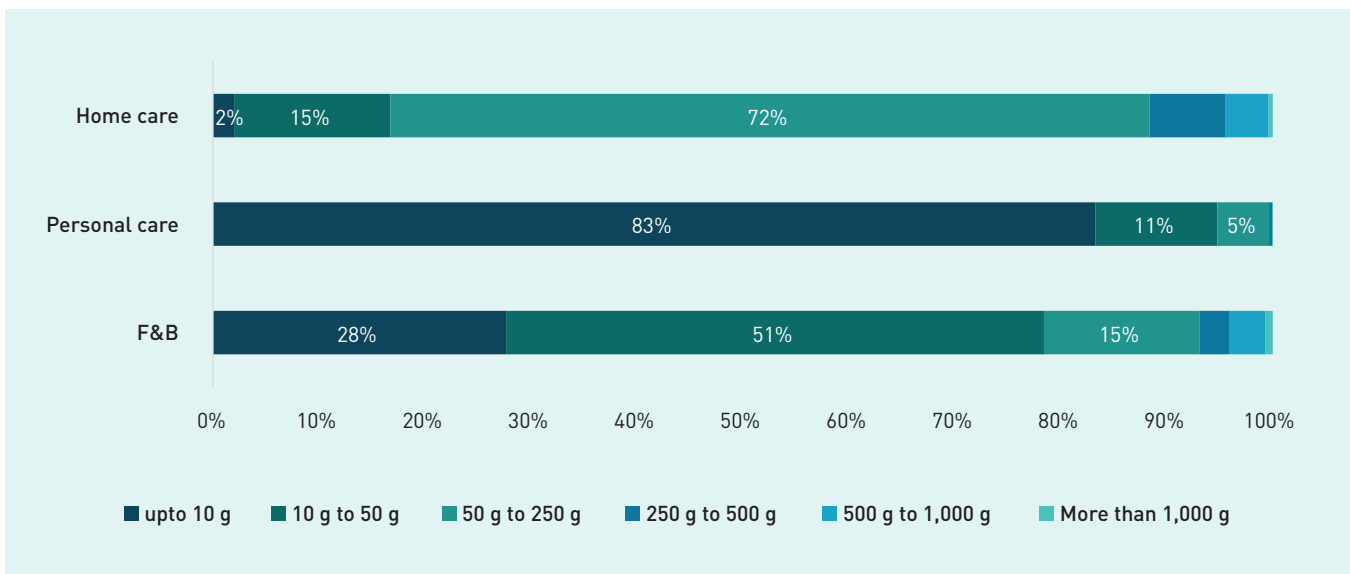


Figure 3: Share of different size classes in each FMCG segment in terms of number of units sold (2021)

The data presented above provide an overview of the landscape of small format packaging in India with respect to prevalence of use in a particular segment, products packaged, and packaging sizes used. The data also indicate the product segments which, if targeted, would allow a significant improvement in the management of

small format waste. A detailed analysis will follow in Phase II of the report. As a first step towards this deeper analysis, a conceptual framework is presented in the next chapter to suggest interventions to manage small format and sachet packaging.

# Framework of interventions to better manage small formats



Market data indicate that in 2021, 75% of all FMCG units placed on the Indian market were small formats and sachets. Information gathered from literature and stakeholder interactions suggests that these formats are prone to littering and collection rates are low. Even if collected, lack of viable end markets means that these formats are not recycled at scale, ending up in landfills or in waste-to-energy incinerators.

Changes are needed across the value chain (from design, to use, to disposal, to recycling) to better manage small formats and to ensure they are collected, segregated and are placed back into the value chain at scale.

In this section, a conceptual framework of possible interventions is introduced. The framework follows the principles of the Plastics Pact model, which is to

- *eliminate* problematic and unnecessary plastic items,
- *innovate* to ensure that the plastics we do need are reusable, recyclable, or compostable, and
- *circulate* all the plastic items we use to keep them in the economy and out of the environment.

In addition to these principles, the possible interventions should align with the waste management hierarchy suggested below.

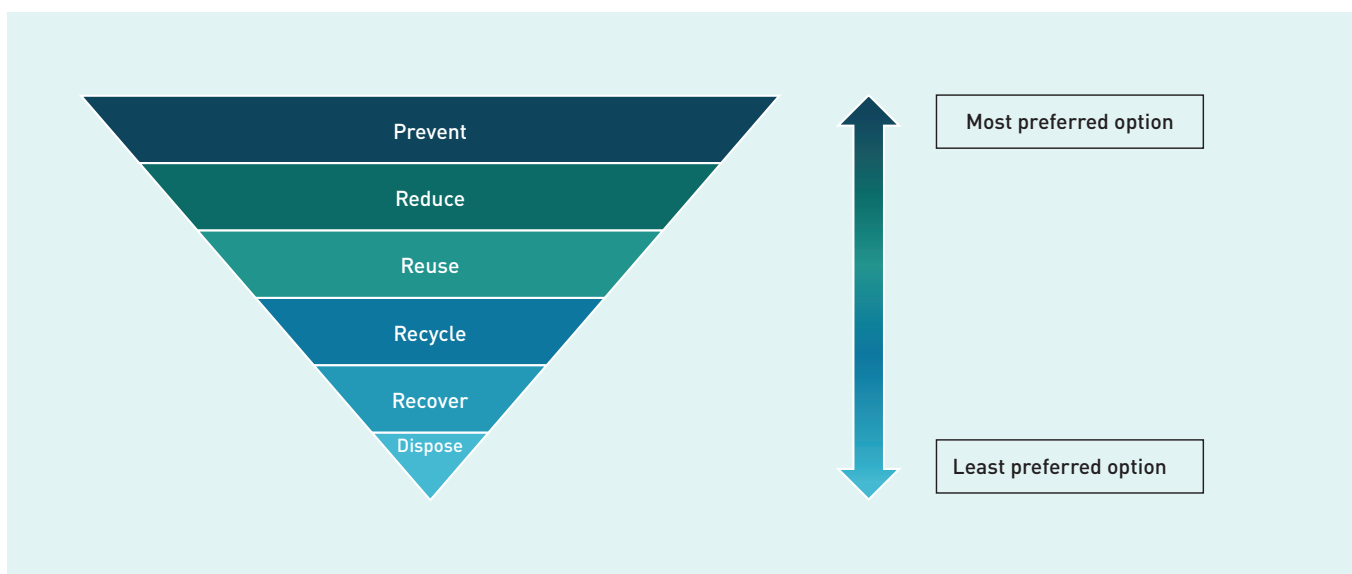


Figure 4: Waste management hierarchy

# Eliminate

As a first step, businesses should consider using small format and sachet single-use packaging only where required and removing it where it is problematic and unnecessary (Target 1 of the India Plastics Pact). Further, businesses could consider:

- **transitioning from disposable packaging to alternate delivery models (such as refill and reuse):** a shift to reuse and refill models for many everyday items to help displace single-use plastic packaging. In the Indian context, since three out of four FMCG products are sold in small formats, the potential for impact is large, and the need to examine the viability of reuse and refill models for small formats is evident.
- **material substitution (away from plastics):** businesses can consider using materials other than plastics for packaging, but mindful of the fact that any packaging material will have an environmental impact and consume resources.

# Innovate

If elimination is not possible, businesses should innovate to ensure that packaging placed on the market is recyclable or compostable in the Indian context (Target 2 of the India Plastics Pact). This might need increased expenditure for research and development. The small margins associated with sales of small formats and sachets might mean businesses find it unviable to invest in the short term. However, in the long term this should remain a focus through:

- **improving material quality:** businesses should remove non-recyclable elements and improve material quality so as to facilitate recycling and reprocessing. In the Indian context, it is observed that small formats and sachet packaging are, more often than not, multi-polymer or multi-material. Design changes to mono-material or mono-polymer compositions can help increase the value of packaging at end-of-life. This, in turn, could help raise collection rates.
- **exploring alternative formats (transition from flexible to rigid formats):** in India, rigid packaging has a higher probability of being collected and recycled, if designed to be of high value. Shifting to small format rigid packaging should increase the likelihood of collection: current market data for India suggests that 97%

of small formats use flexible packaging material. While a transition to rigid packaging may increase collection, a potential trade-off to be accounted for is that of increased resource use. As format change may also affect other aspects, such as product wastage and shelf life, each opportunity should be assessed on a case-by-case basis.

# Circulate

Packaging in small formats and sachets allows all kinds of goods to remain accessible to people of all socio-economic groups because they can be priced attractively. Given that small formats are: a) multi-layered, most of the time, b) likely to continue being used, and, c) extremely prone to littering, it is important to ensure the small format packaging waste generated is effectively managed, that is, such packaging is collected, segregated and effective waste management practices are put in place.

While basic infrastructure (such as for waste-to-energy conversion and flexible plastics recycling) to manage small format waste might exist in India, there is a need for improving collection rates. Strong and stable end-markets need to be developed. Achieving this will require:

- investing on consumer behaviour change to implement segregation at source,
- investing in collection systems,
- incentivising collection of small formats, and
- increasing installed capacity for recycling.

Improving collection and segregation of post-consumer small format packaging will ensure that these formats are removed from the environment. Thus, businesses should focus on assisting in improving collection rates.

While a shift to mono-polymer substrates (part of 'Innovate') will help to increase the value of small formats at end-of-life (by motivating collection), it is not necessary that all small formats can be transitioned.

Therefore, it is important to explore ways of increasing the collection rate of these 'low-value' small formats. These could include providing incentives to informal waste sector workers to collect these formats or take-back/exchange schemes for consumers. Again, improved collection must be supported by viable channels for waste management.



# Next steps

This report analyses FMCG product sales data to derive high-level inferences on the current landscape of small format and sachet packaging.

While it can be reasonably assumed that the share of small formats and sachets (in terms of weight) is low compared to the total weight of FMCG plastic packaging, the number of units of these formats placed on the market is undeniably large (three out of four FMCG units placed on the markets are in small formats). This clearly indicates the importance of setting up waste management practices tailored to these formats.

The suggested Eliminate-Innovate-Circulate framework could ensure businesses identify interventions for improving the management of waste generated by these packaging formats. However, implementation will require digging deeper into the market data to identify products, locations (rural or urban) and interventions best suited for action at scale: in-depth analysis will be taken up in the next phase of work.

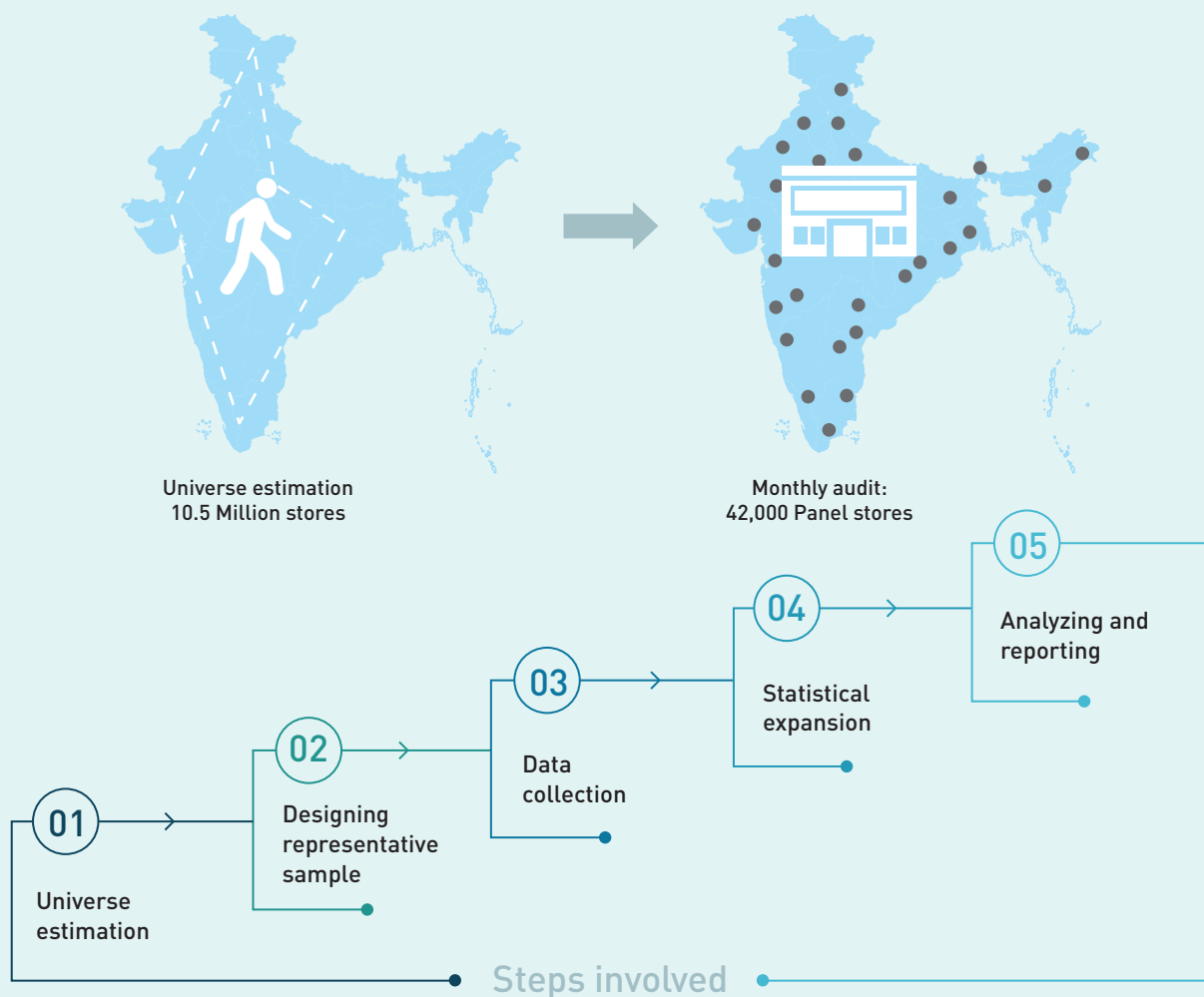
# Annex 1

Methodology used by Nielsen to collect country-level FMCG sales data

- The data set has a pre-defined universe of 10.5 million retail stores across the country. Includes grocery stores, supermarkets, chemists, cosmetics stores and smaller retailers/pan shops who operate from a permanent structure.
- From this, 42,000 representative sample stores are selected from whom data is collected on a monthly basis. This data is then statistically expanded to obtain data for the entire country.

## Steps involved

There is five step methodology that will be used to estimate category



\* Above methodology is deployed for traditional trade channels such as small grocers and chemists. For modern trade such as supermarkets, point-of-sale data is used

# Annex 2

Share of plastic packaging for the 29 selected products (in terms of number of units sold)

Segment	Product	Share of plastic packaging
Food and beverage	Milk powder	99%
	Instant coffee	99%
	Blended spices	87%
	Pure spices	92%
	Packaged tea	96%
	Coconut oil	98%
	Refined oil	>99%
	Non-refined oil	99%
	Packaged pure ghee	93%
	Ketchup	94%
	Salty snacks	>99%
	Chocolates	98%
	Breakfast cereal	96%
	Biscuits	>99%
	Confectionery	99%
	Still soft drinks	52%
	Sparkling soft drinks	84%
Personal care	Toothpaste	>99%
	Skin creams	81%
	Tooth powder	87%
	Talcum powder	97%
	Hair oil	96%
	Shampoo	>99%
Home care	Toilet soaps	81%
	Toilet cleaners	99%
	Washing powder	>99%
	Floor cleaners	99%
	Detergents	99%
	Utensil cleaners	99%



## About the India Plastics Pact

The India Plastics Pact is a collaboration between the Confederation of Indian Industry (CII) and WWF India that unites businesses, governments, NGOs and citizens to create a circular plastics economy in India. The CII-ITC Centre of Excellence for Sustainable Development (CESD) anchors the India Plastics Pact, within CII. The initiative is supported by WRAP, a global NGO based in the UK.

Launched in September 2021, the India Plastics Pact is the first Plastics Pact in Asia. As of December 2022, there were 13 Plastics Pacts spread across the globe. 41 organizations are currently part of the India Plastics Pact. The Pact works on all plastic resins at all stages of the plastics value chain.



Confederation of Indian Industry

## About Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering Industry, Government, and civil society, through advisory and consultative processes. For more than 125 years, CII has been engaged in shaping India's development journey and works proactively on transforming Indian Industry's engagement in national development. CII engages closely with Government on policy issues and interfaces with thought leaders to enhance efficiency, competitiveness and business opportunities for Industry through a wide portfolio of specialized services and strategic global linkages.

India's premier business association has around 9,000 members, from the private as well as public sectors, and an indirect membership of over 300,000 enterprises from around 286 national and regional sectoral industry bodies. With 62 offices, including 10 Centres of Excellence in India, and 8 overseas offices in Australia, Egypt, Germany, Indonesia, Singapore, UAE, UK, and USA, as well as institutional partnerships with 350 counterpart organizations in 133 countries, CII serves as a reference point for Indian Industry and the international business community.



## About WWF India

WWF India is committed to creating and demonstrating practical solutions that help conserve India's ecosystems and rich biodiversity. With more than 50 years of conservation journey in the country, WWF India works towards finding science-based and sustainable solutions to address challenges at the interface of development and conservation. WWF India is part of the WWF network, with offices in over 100 countries across the world. WWF India works in many states of India, through our state and field offices. The organisation works in different geographical regions and across thematic areas, including the conservation of key wildlife species and their habitats, management of rivers, wetlands and their ecosystems. On the sustainability side, the focus areas are climate change adaptation, driving sustainable solutions for business and agriculture and empowering local communities as stewards of conservation. WWF India also works in combatting illegal wildlife trade and in bringing environment education to students through outreach and awareness campaigns.



## About WRAP

WRAP is a climate action NGO working around the globe to tackle the causes of the climate crisis and give the planet a sustainable future. Our vision is a thriving world in which climate change is no longer a problem. We believe that our natural resources should not be wasted and that everything we use should be re used and recycled. We bring together and work with governments, businesses and individuals to ensure that the world's natural resources are used more sustainably. Our core purpose is to help tackle climate change and protect our planet by changing the way things are produced, consumed and disposed of. We support partner NGOs around the world to deliver real change through collaboration and progress from over 300 of the world's largest businesses. Initiatives we support include: Plastics Pacts in Chile, Kenya and India; food waste agreements in Mexico, South Africa and Indonesia; and food waste citizen campaigns through our Love Food Hate Waste brand in Canada, Australia and New Zealand.

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## UKRI India

UKRI India plays a key role in enhancing the research and innovation collaboration between the UK and India. Since 2008, the UK and Indian governments, and third parties, have together invested over £330 million in co-funded research and innovation programmes.

This investment has brought about more than 258 individual projects. The projects were funded by over 15 funding agencies, bringing together more than 220 lead institutions from the UK and India. These research projects have generated more than £450 million in further funding, mainly from public bodies but also from non-profit organisations and commercial entities, attesting the relevance of these projects.







# INDIA PLASTICS PACT

Developed by



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