



**Annual Report 2006**

Plastics – challenging  
the energy of youth



**PlasticsEurope**  
Association of Plastics Manufacturers



Plastics*Europe*

**Annual Report 2006**



# Foreword

## Plastics – challenging the energy of youth

Youth likes a challenge – and plenty of challenges certainly lie ahead for today's younger generation. Protecting the earth from global warming, slowing the depletion of fossil fuel resources, managing the socio-economic changes that result from demographic shifts...



John Taylor

Fortunately, with youth also comes the energy to do what needs to be done and the optimism that inspires enterprise and courage. Plastics – the material for the 21st century – will help young people not only to create an exciting, fulfilling lifestyle, but also to ensure that their lifestyle is safe and sustainable.

### Tomorrow's decision-makers...

In 2006, many of our activities as *PlasticsEurope* were devoted to showing the youth of Europe just what effect plastics already have on their lives and what those materials will mean in the years to come. That's why we have taken as our theme for this year's Annual Report ***Plastics – challenging the energy of youth***. I cannot think of a more important topic, because it is ultimately the young people of today who will decide what happens tomorrow: they are the decision-makers of the future. It is crucial that, even while still at school, they have a good understanding of plastics, based on the facts, and a clear-sighted appreciation of the choices available to them.

### ... and those of today

At the same time, we need to make sure that today's decision-makers – and the public on whose support they depend – are also properly informed. It is our belief that accurate knowledge and understanding about plastics and their benefits is always in our best interest. Our coordinated response to attempts by governments in various countries to limit the distribution of plastic bags is a good example of how we can effectively combat misconceptions and ignorance, presenting clear facts and explanations to decision-makers and the public.



Young people of today are the decision-makers of the future





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The FIFA World Cup was a perfect platform to communicate our message that plastics can make an important contribution to conserving energy, boosting innovation and improving quality of life





# Executive Director's Message

## A year of good progress



Wilfried Haensel

It is somewhat difficult as Executive Director to report on a year in which one was not actually in office: I succeeded Nancy Russotto on 1st January 2007. Consequently, what I write here is – even more expressly than is perhaps usual in such cases – written also on behalf of my colleagues in the Leadership Team.

As an organisation we set ourselves ambitious goals in 2006, with the aim of exploiting the synergies that come from working together – both with each other, as a Europe-wide network, and as a representative of part of the plastics value chain. During the year, we made good progress towards achieving those goals: moving ahead with our strategic plans, responding in a consistent and coordinated way to issues that arose, providing information and advice to decision-makers, continuing our educational activities, and reaching out to our key target audiences.

### Positioning plastics as the material for the 21st century

In implementing our goal of positioning plastics as the material for the 21st century, we took a three-pronged approach:

- We emphasised through a variety of channels (to decision-makers, opinion leaders and the public at large) that plastics have a significant role to play in tackling two of the major challenges facing the world in the coming century: energy efficiency and climate protection
- We continued our policy of proactively providing the public and the authorities with accurate and transparent information about plastics, so that our industry becomes valued by all as a trusted source and partner
- In line with our strategy of targeting young people, we continued to reach out to them through educational, leisure and lifestyle activities across the continent.

### **Communicating consistently across Europe**

Building further on the benefits offered by our networked structure, in 2006 we strengthened the consistency of our advocacy and communications efforts across Europe, and coordinated campaigns and activities developed in the Regions in line with our strategy.

- We took full advantage of the FIFA World Cup to drive home in various countries our message that plastics can make an important contribution to conserving energy, boosting innovation and improving the quality of life.
- We supported causes that link young people, plastics and football (Kits for Kids, Kick to Give).
- Through campaigns in Italy and Spain, we raised awareness among young people of the role plastics play in improving the quality of their lives.
- Where it arose, we responded to the issue of plastic bags by presenting a consistent position, and conducting public campaigns in France and Spain that were fully aligned with this position.
- We sponsored educational activities, both in individual regions and Europe-wide.

### **Working with the value chain**

To make our voice best heard, it is our intention to work with others in the plastics value chain whenever we can. In 2006, we made good progress on this score.

- We set up a value-chain steering group to oversee our activities in this area.
- We drew up a common agenda with the European Plastics Converters Association (EuPC).
- We held a workshop with selected value-chain partners to agree positioning on matters of common concern.
- We finalised our new strategy with regard to consumer protection.
- We took a proactive approach to issues relating to chemicals in plastics, working together not only with the chemicals industry, but also with the food and building industries.
- We cooperated with chemicals companies on REACH, the EU law requiring the registration, evaluation and authorisation of chemicals.

### Managing issues

Our aim is to respond quickly and effectively to any issues that may arise affecting the plastics industry. On this score, in 2006 two major issues were particularly relevant, and we were active in conveying our views to the European Commission, the European Parliament, national governments and the media.

**Bioplastics and biodegradability.** In response to proposals in Italy and France to ban the distribution of non-biodegradable plastic bags, we mounted, in cooperation with the plastics converters, a powerful communication and advocacy campaign to counter factual misconceptions. The Italian proposals envisage the implementation of a programme which is currently in the process of being defined, while the legislation in France, though passed, has been challenged by the European Commission. Meanwhile, we have developed plans to try to pre-empt further issues of this type arising.

**Waste and energy management.** We made submissions on waste management and energy matters to the European Commission in connection with their revision of a number of directives and to the UK government as part of their waste and energy policy review. We also made known our views on the need for the minimisation of landfill and for a flexible application of the waste hierarchy.

Although *PlasticsEurope* still has a long way to go before we can say we have achieved the strategic goals we have set ourselves, I am confident we will be able to build further on the firm foundations laid over the past few years and make significant advances in 2007. ■

Wilfried Haensel  
Executive Director



In 2006, we expanded and strengthened our European network so that we can reach out more effectively to political contacts in Brussels and throughout Europe



# Consumer and Environmental Affairs

## Creating transparency by establishing the facts

In 2006, *PlasticsEurope* worked to correct misconceptions amongst the general public and legislators in certain EU Member States about the relative environmental merits of 'bioplastics' and petroleum-based plastics. We also sought to make a positive contribution to the debate within the European Commission and the European Parliament on waste management issues. At the same time, we continued our efforts to create a sound, objective body of knowledge about plastics and their environmental impact.

### Bio-based plastics and biodegradability

Are plastic bags that are biodegradable or made from biomass more environmentally friendly than those made from petroleum-based plastic?

Many people, including politicians, automatically assume they are. But of course, the matter is by no means so black and white: in-depth analysis is required before the question can be answered properly. Moreover, the nature of the raw materials and the biodegradability of the plastics made from them are quite separate issues. In 2006, *PlasticsEurope* therefore took two important steps to remove popular misconceptions on the issue:

- First, together with EuPC, we developed and distributed a position paper clarifying terminology and explaining why the source of the plastics and their biodegradability are separate issues and should not be confused.
- Second, we brought together a group of stakeholders with very varied interests for a Bioplastics Workshop in Brussels. We mapped out issues and drivers, as well as opportunities for continuing dialogue. Delegates agreed there was a need for clear terminology, transparent product performance, and criteria for defining what 'biodegradable' means. All participants supported the position that degradable plastics of all kinds are not a solution to the litter problem.

## Waste management

Waste management was high on the European agenda in 2006, as the Commission worked to revise the Waste Framework Directive. We developed a position paper to clarify several issues relating to the revision. We stressed the need for a broad definition of recycling, allowing for both mechanical and feedstock recycling. We also pointed out that recovering energy from remaining plastic waste can contribute to the more efficient use of natural resources. Finally, we argued that the waste hierarchy needs to be applied flexibly to allow selection of the most sustainable waste management option in each case.

## Exposure of consumers to packaging materials



Although there are very strict European regulations in place for plastic materials that come into contact with foodstuffs, there is still a need to thoroughly understand consumers' exposure to packaging. To better meet the future requirements of food contact legislation, *PlasticsEurope*, together with other associations (the Food Contact Additives group of Cefic, EuPC, and Flexible Packaging Europe), initiated a project to identify the exposure of consumers to packaging materials. The first step has been to draw up an 'Exposure Matrix', plotting the various categories of foodstuffs against the various packaging materials that come into contact with them, with a special focus on plastics. Analysis of the current situation was completed in 2006. The data are now being analysed and prepared for modelling.

## Eco-profiles and EPDs

Assessing a product's environmental impact requires taking into account everything that happens during the product's life cycle, from raw material generation to disposal. However, to draw up accurate life-cycle assessments (LCAs), one needs detailed information about the materials used in the products, including how those materials were made. *PlasticsEurope* was the first industry organisation to gather detailed information about the products made by its member companies and make this information publicly available. Since 1991, some 75 eco-profiles have been compiled. They are available on our website and on the website of the EU LCA Platform, and they have already been used in drawing up several thousand LCAs. The profiles are continually updated: the data for PVC, for example, was updated in 2006. In 2006, we also started a new programme to develop Environmental Product Declarations (EPDs) for plastics. One of the first results is the publication of a Product Category Rule (PCR), an agreed common statement of the conditions that EPDs for a particular product category need to satisfy.



# Advocacy

## Our broad network allows us to speak with one voice

In 2006, we expanded and strengthened our European network so that we can reach out more effectively to political contacts in Brussels and throughout Europe. Our aim is to provide insights and facts that will enable decision-makers to make informed decisions: we believe that the more accurate the information they have at their disposal, the better they will be able to make sound decisions concerning plastics. Since setting up our network, we have been able to get our messages across both to the European Parliament and to many Brussels-based stakeholders. In addition, our wide network means we also have a distinct presence in each Member State. This helps us communicate our message consistently: for example, *PlasticsEurope* speaks with the same voice in Stockholm as it does in Brussels. We believe this consistency makes our message both credible and powerful.

### Getting results

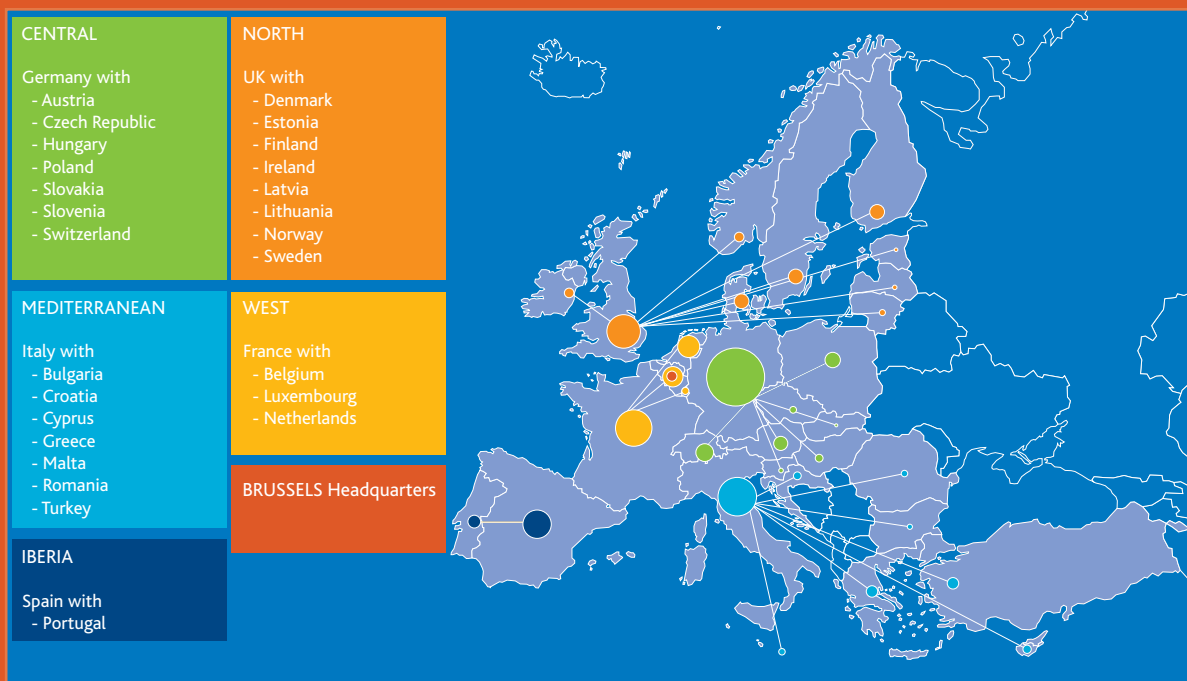
We were able to put our network to good use in 2006 as the European Commission started work on revising the Waste Framework Directive. This Directive is essential to our business, because it provides crucial definitions for terms such as 'recycling' and 'recovery'. It also specifies how the waste hierarchy will be applied. We use our network to effectively communicate our view on this issue consistently in the European Parliament, to the Commission, and to national governments involved in the Council process. Our strongly held view is that a broad definition of recycling combined with a flexible interpretation of the waste hierarchy will stimulate innovation and new business, enable the more efficient use of resources, and better serve to protect the environment.

### The truth about bioplastics

Bioplastics moved increasingly into the spotlight in 2006, as more and more EU Member States (among them France and Italy) began pursuing legislation to ban non-biodegradable plastic bags – without considering all the relevant facts about plastics. Many participants in the debate, for instance, regularly confused biomass-plastics (plastics made from biomass as opposed to fossil feedstock) with biodegradable plastics (plastics that will degrade under certain conditions). A high-profile workshop facilitated by *PlasticsEurope* in October came to the conclusion that more relevant information on this topic was required. In 2006, we began to spread the facts through a number of activities in order to raise awareness of bioplastics and enable a more informed and nuanced view to prevail. In France, for example, *PlasticsEurope* spokespeople appeared on a number of TV programmes dealing with the subject of biodegradable plastics.

## Networks

In an industry like ours, the players are interdependent. Our actions affect others; their actions affect us. For this reason, *PlasticsEurope* works closely together, in alliances and networks, with other groups with whom we have a common interest. This is not only effective when communicating with policy-makers but is also appreciated by them. In line with this policy, in 2006 we worked closely with the European Plastics Converters Association (EuPC) on a number of topics. We also interact with associations outside the plastics industry: in 2006, for instance, we took part in the European Commission programme 'Sustainable Energy Europe', a Europe-wide campaign to raise awareness and promote sustainable energy production. We also became an associate member of the European Energy Forum, a platform to facilitate the interchange of information on energy issues.



PlasticsEurope's extensive network

# Communications

## Reaching out to a new generation

PlasticsEurope communications had a successful year in 2006. Besides reaching the public via all forms of media, we were also able to take advantage of one of the world's major sporting events to get our major messages across.

### FIFA World Cup fever

In June 2006, the FIFA World Cup captured the attention of the global community and provided us with an excellent opportunity to share information about the benefits of plastics with the world. During the month-long event, we were able to show the public what an important role plastics play in modern-day football – while also allowing them to have a bit of fun! Many activities were inspired by PlasticsEurope's Central Region, where the competition was based.



Frankfurt stadium

### Going green



Jean-Marie Pfaff

Days before the opening of the World Cup, we contributed to the eco-friendly Green Goal initiative. Organised by FIFA and the United Nations Environmental Programme, Green Goal aimed to ensure the entire football event was climate-neutral (i.e., did not increase global warming). During an event in Brussels – which was attended by key stakeholders, such as journalists, captains of industry and European politicians – guests could put their penalty-taking skills to the test. Belgium football legend Jean-Marie Pfaff assumed his former position as goalkeeper – and for each ball that got past him, money was donated to the climate-neutral campaign. This money came from a number of organisations, including PlasticsEurope. In fact, thanks to the generosity of our members, PlasticsEurope was able to donate a total of €100,000 to the initiative. What's more, this was another chance to show people our concern for the environment and to improve public perception of plastics.

## Reaching out to young people

Although we are continuously striving to inform the public as a whole about plastics, many of our initiatives this year were focused on reaching young people in particular.

In 2006, we donated some €150,000 to the 'Kits for Kids' programme, implemented throughout Europe. International football matches (15 in total) were organised for underprivileged children from various countries. These kids – who might not normally have an opportunity to play football, let alone an international match – were given kits that included all sorts of football-related goods made from plastic, such as shirts, sneakers, shorts and shin-guards.



Our web-based initiative 'Kick to Give' aimed to raise money for underprivileged children. Visitors to our 'Kick to Give' website had a chance to 'beat the keeper' by clicking on a football to direct it into a goal. After each attempt, they could test their knowledge in a football quiz. This initiative was very successful: by

December, we had reached our target of 6 million kicks. All the money we raised – €100,000 – was donated to the Johan Cruyff Foundation, which supports projects and organisations that aim to advance the mental and physical welfare of children through physical exercise, sports and play. Cruyff himself accepted this donation during an Open Day at the Olympic Stadium in Amsterdam. The Foundation plans to use this money to create playgrounds in neighbourhoods in need throughout Europe.



Football is not the only way we are addressing the subject of plastics with young people. This past year, in cooperation with European Schoolnet (a network of 28 Ministries of Education), we also established

a school web project, FuturEnergia. This is an interactive website that aims to educate school students about the importance of energy savings – and how plastics can help. Most of the activities will take place in 2007, and by the end of that year we expect 1.5 million students to have visited the site. The online activities also include a poster competition, as well as web chats with senior representatives from the world of politics and business. The first of these chats took place on 30 November 2006. Hosted by Dr R. Stauber, Head of Operational Stability and Materials at BMW, it dealt with the theme of energy efficiency and car design. The second chat, held on 18 December, brought climate-neutrality experts and European students together to discuss the question of how to organise a climate-neutral end-of-year celebration!



School poster competition



Chat: How to secure energy after depletion of resources?



School poster competition



Chat: Making better use of energy



Chat: How to organise a climate-neutral New Year's Eve party?



School poster competition



School poster competition



FuturEnergia homepage



School poster competition





Although we are continuously striving to inform the public as a whole about plastics, many of our initiatives this year were focused on reaching young people in particular





# Regional Reports

## Central Region

**AUSTRIA, THE CZECH REPUBLIC, GERMANY, HUNGARY, POLAND, SLOVAKIA, SLOVENIA AND SWITZERLAND**

The Central Region accounts for more than one-third of European plastics production and demand. It was therefore significant that, in 2006, we were able to welcome Polish as the sixth official language of *PlasticsEurope*, reflecting both Poland's size and its importance in Europe today. During the year, the Region was very active in bringing to people's attention the many different (and often unnoticed) ways plastics enrich their lives.

### Hosting the FIFA World Cup



Press visit to Frankfurt Stadium

As the host of the 2006 FIFA World Cup, Germany took the lead in all related *PlasticsEurope* activities. We organised a press trip for 15 journalists from 8 countries: Croatia, the Czech Republic, Germany, Italy, the Netherlands, Spain, Poland and the UK. The journalists had an opportunity to see what a key role plastics play in today's soccer, from the stadium roof to the ball itself. This was followed up by a direct mail campaign that included an informational leaflet on the subject. Two other football-related initiatives – 'The Green Goal' and the Internet-based 'Kick to Give' game – were also incredibly successful in promoting energy awareness and helping underprivileged children respectively.

### Further involvement with the press

We also undertook many other media activities in 2006. These included a press conference in Frankfurt, and another in Prague during the ICF Canoeing World Championship. In Austria, we joined in the celebration of the 250th anniversary of Mozart's birth. Because plastics play a huge role in music – they can be found in everything from CDs and clarinets to violin strings and drum skins – we sponsored a 'Calling Mozart' walking tour in Vienna. Fifty info pillars bearing our logo were set up throughout the city. They featured interesting Mozart-related information and items, such as quotations from his letters and clips of his music.

### Focusing on youth



Educational kit - "Kunos coole Kunststoff-Kiste"

Much of our outreach effort in 2006 year centred on young people. For instance, we distributed *Kunos coole Kunststoff-Kiste* ('Kuno's Cool Plastic Box'), an educational toolkit for young people, with experiments, surprising facts and fun things to do. The first 100 kits in Saxony were presented to schools in Dresden by Steffen Flath, Saxony's Minister of Culture and Education. We also continued many of our other successful activities for young people, distributing our book about plastics to secondary schools, holding youth press conferences throughout the Region, and participating in meetings and seminars for students and teachers.

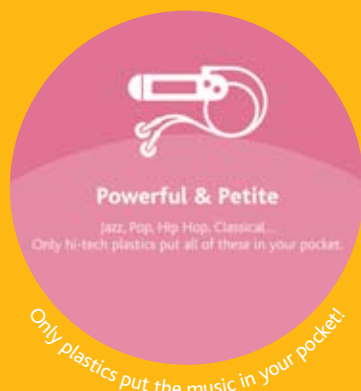
## Iberia Region

### SPAIN AND PORTUGAL

The Iberia Region of PlasticsEurope made substantial progress in 2006. Established only in 2005, the public launch took place in June 2006. The ceremony was attended by key representatives of the plastics value chain in Spain and Portugal as well as by senior officials from the Ministry of the Environment and the Ministry of Industry. This special event generated several articles in the Spanish press.

#### Take me to the Yellow Container!

Together with other members of the plastics value chain and some of Spain's largest retailers, we launched a big campaign to improve public perception of plastic bags and encourage people to reuse and recycle plastic bags. We made use of 'The Yellow Container', a popular multi-purpose collection point for the recycling of all sorts of packaging materials. To spread the recycling message, informative brochures were distributed in supermarkets and other stores, and 1,000 posters were displayed in shopping centres. All plastic shopping bags issued by participating stores featured the slogan: 'Don't throw me away – recycle me! Take me to the Yellow Container.'



#### Radio campaign

In 2006, we also launched our first radio campaign. The aim was to create public awareness about the benefits of plastics. Three selected messages were broadcast daily from October to December at prime radio time:

- Did you know that 50% of people in Spain see better thanks to plastics? Plastics take care of your eyes – in style!
- Powerful & Petite. Jazz, Pop, Hip-hop, Classical... Only hi-tech plastics put all of these in your pocket.
- Did you know that a used plastic bag has the energy potential to light up a room with a 60W bulb for 10 minutes?

An evaluation of the campaign, carried out by one of our members, Repsol Química, showed that the messages were very well received and appreciated.

#### Leading the way

In 2006, the Iberia Region led the PlasticsEurope Standardisation Workshop. Delegates from several member companies attended this event, which was designed to encourage the plastics industry to take part in standardisation activities.

## Mediterranean Region

*BULGARIA, CROATIA, CYPRUS, GREECE, ITALY, MALTA, ROMANIA AND TURKEY*

The countries in the Mediterranean Region have markets that are in different stages of development. This diversity makes it difficult to treat the region as a single entity: different countries require different approaches. However, at the same time, we aim to be consistent and to implement uniform campaigns throughout the region wherever possible. In 2006, these campaigns related mainly to waste management and the public perception of plastics.

### A year of transformation

In 2006, the Region's developing countries underwent a significant transformation, largely due to the continued rapid growth of the plastics converting industry there. This growth, in turn, reflects demand from the many new industrial plants that have recently started up in these countries as companies in more developed markets seek to reduce production costs.



### Do you know who I am?



In Italy, we launched a major promotional campaign in 2006 to make teenagers more aware of the important role plastics play in their lives. Since *PlasticsEurope* is very active in education, young people generally tend to have a more favourable view of plastics than their parents. The goal of this campaign was therefore not to change their perception, but rather to increase and strengthen it. The campaign, entitled *Do you know who I am?*, ran from June to November. One of the main components was a series of happy-hour events held at popular bars in major cities, including Milan and Rome, as well as in smaller towns throughout the country. To promote the events, we displayed posters in metro stations and distributed promotional cards, all featuring

provocative statements about plastics, such as *'You go to bed with me, but you don't even know my name'* (personal stereos) and *'You talk with me every day, but you don't even know my name'* (mobile phones). In addition, we sent out 270,000 e-mails and 50,000 text messages to young people all over Italy. In all, these events attracted more than 7,500 participants.

## North Region

*DENMARK, ESTONIA, FINLAND, IRELAND, LATVIA, LITHUANIA, NORWAY, SWEDEN AND THE UK*

Throughout 2006, the North Region took many initiatives to ensure external parties were kept well informed about plastics.

### UK policy reviews

In the UK, the government undertook a substantial review of both its energy strategy and its waste strategy. To ensure that decision-makers will be able to make informed policy choices, our regional representatives, together with the British Plastics Federation, submitted relevant information and facts about plastics to high-level officials at the Department for Environment, Food and Rural Affairs (DEFRA), the Department for Trade and Industry and other government departments.



Kits for Kids' event at Wheathampstead, UK

### Plastic bags

As in other Regions, the issue of plastic bags and their biodegradability became a matter of public debate in the North Region in 2006, particularly in the UK. We made every effort to engage fully in the dialogue on this important subject. As part of this effort, we began planning workshops for a number of major UK retailers, with the aim of providing these important stakeholders with key facts about bioplastics and their role in society today.

### Open debate

The North Region also organised a workshop in Helsinki last November to discuss solid recovered fuel. This emerging opportunity, which involves upgrading municipal solid waste and other waste to produce a specified fuel, shows great potential as a substitute for other fuels in cement production or energy production. The workshop was attended by delegates from the European Parliament, the European Commission, the Finnish government (which held the EU Presidency at the time) and the industry at large.

## West Region

FRANCE, THE NETHERLANDS, BELGIUM AND LUXEMBOURG

The West Region had a busy year in 2006, not only taking an active part in Europe-wide projects, but also continuing our outreach efforts and initiating new projects at national level.

### Spreading our message



Our magazine *Entrée en Matière*, distributed throughout France, continues to be a popular and effective channel for reaching a wide audience. In 2006, we took steps to extend its scope to the rest of the Region: early in 2007, the French version will also be distributed in Wallonia and a Dutch-language version will be produced for Flanders and the Netherlands. During 2006, as in previous years, we held regional and national seminars for our members, the plastics value chain and others on highly relevant topics, such as energy efficiency and climate protection.

### Open dialogue

In 2006, the French and Belgian governments proposed banning or limiting the distribution of non-biodegradable plastic bags. Widespread misunderstanding about the issue became apparent in the numerous debates on the issue, and we took urgent steps to provide clarification. Our representatives were invited to appear on many talk shows on French and Belgian TV, allowing us to share our views and keep the dialogue open.

### National initiatives

The West Region also implemented a number of national initiatives in 2006.

- In France, we launched the *Sakatout* ('Bag for Everything') shopping bag to promote the reuse and recycling of plastic bags. Some 95,000 of these bags were distributed to consumers and opinion formers, with the aim of persuading major retailers to adopt the concept. After using the bag only four times, people start having a positive impact on the environment!
- In Belgium, we continued to participate in Polygonya, a government-sponsored innovation project to promote innovation in the plastics and rubber industry.
- We seized the ideal opportunity provided by the FIFA World Cup to educate young people about plastics. In the Netherlands, 1,800 school children took part in a football competition: their school could win a computer and the children themselves could win their own World Cup football – made of plastic, of course!
- We also managed to show FOST Plus (the domestic packaging recovery organisation in Belgium) that the way of calculating Green Dot tariffs needed to be changed. This will save the plastics industry €1.75m annually.



# Key Figures

PlasticsEurope European Market Research and Statistics Working Group collects and collates European manufacturers' production and demand data for low-density polyethylene (PE-LD), linear low-density polyethylene (PE-LLD), high-density polyethylene (PE-HD), polypropylene (PP), polystyrene (PS), polyvinyl chloride (PVC) and polyethylene terephthalate (PET).

Unless indicated otherwise, the figures represent well over 95% of total production capacity in Europe for these plastics. The figures cover the EU 25, Norway and Switzerland unless indicated differently. The graphs show the consolidated results for 2004, 2005 and 2006. The terms used are defined as follows:

## PE-LLD

Co-polymer grades marketed as linear low density

Coverage: EU15 and Norway, Switzerland, Malta and Cyprus

## PE-LD

Grades of polyethylene having a density of 0.940 g/cm<sup>3</sup> or less, excluding linear low density polyethylene

Coverage: EU15 and Norway, Switzerland, Malta and Cyprus

## PE-HD

Grades of polyethylene having densities in excess of 0.940 g/cm<sup>3</sup>

Coverage: EU15, Norway and Switzerland

## PP

Homo- and co-polymers

Coverage: EU15 and Norway, Switzerland, Malta and Cyprus

## PS

Does not include EPS

Coverage: EU25

## PET

Does not include fibre grades

Coverage: EU25, Norway and Switzerland

## PVC

Coverage: EU25, Norway and Switzerland





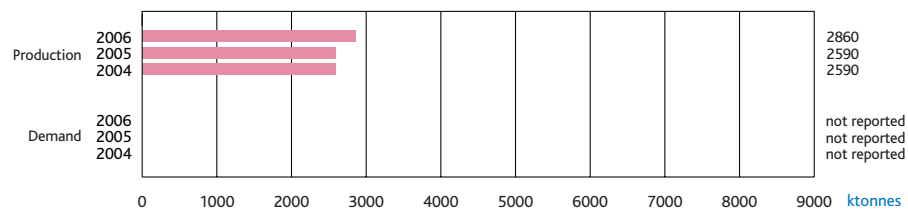
## PRODUCTION

Polymers produced in Europe

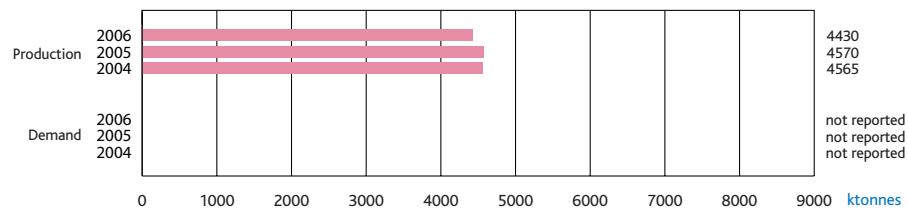
## DEMAND

All 'virgin' polymers used by converters in Europe, including imports (reported as 'sales' in 2004)

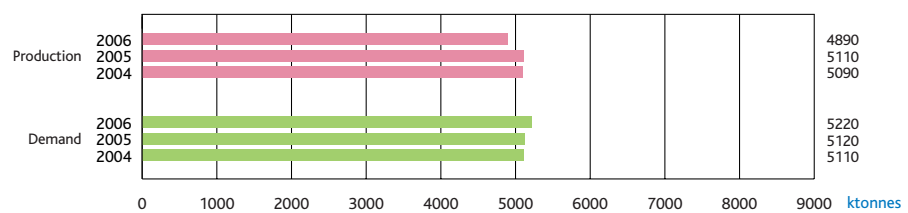
### PE-LLD



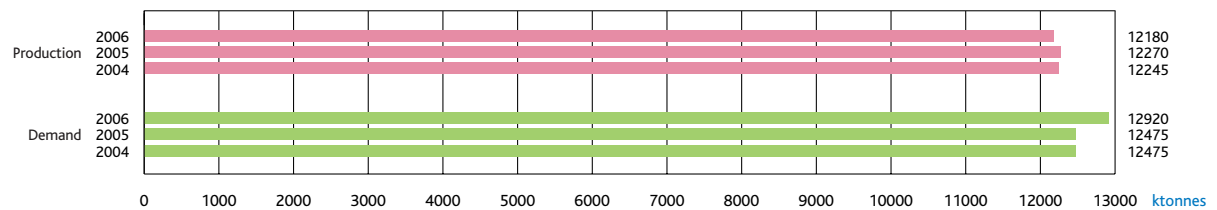
### PE-LD



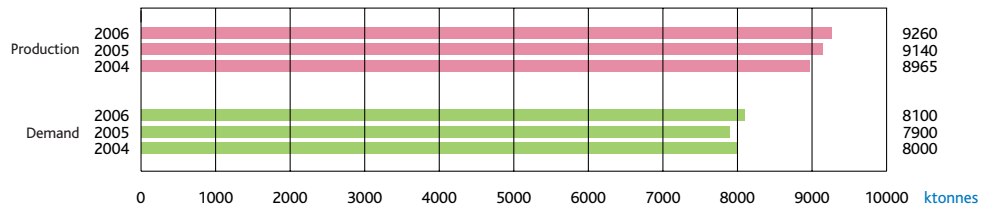
### PE-HD



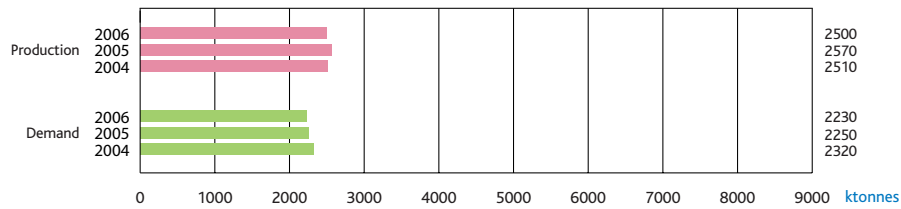
### PE



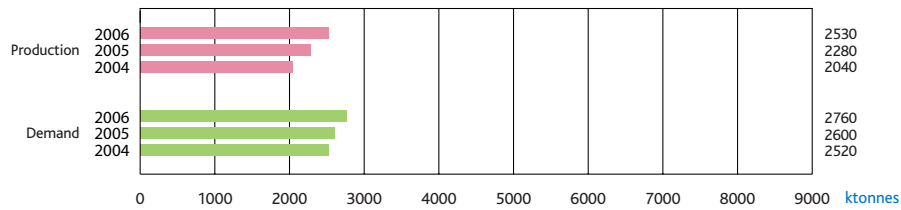
## PP



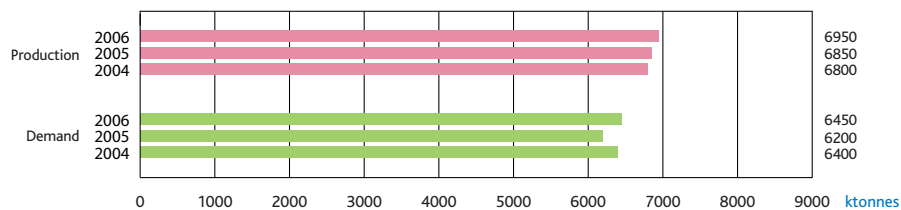
## PS (EU25+2)



## PET (EU 25+2)



## PVC (EU 25+2)



As an organisation we set ourselves ambitious goals in 2006, with the aim of exploiting the synergies that come from working together – both within our network, and with the plastics value chain



# Membership Status \*

<b>AT</b>	Borealis Sunpor Kunststoff	<b>ES</b>	Aragonesas Industrias y Energia <sup>(1)</sup> Ashland Chemical Company NOVAPET Repsol YPF
<b>BE</b>	Basell Polyolefins Cytec Surface Specialties Eval Europe ExxonMobil Chemical Europe Gabriel Technologie LVM PolyOne Solvay	<b>FR</b>	Arkema TOTAL Petrochemicals
<b>CH</b>	DOW Europe DuPont de Nemours International EMS-PRIMID Equipolymers Huntsman Advanced Materials NOVA Innovene	<b>GB</b>	Advansa AGC Chemicals Europe <sup>(2)</sup> BP INEOS Scott Bader
<b>CZ</b>	Chemopetrol Kaucuk Spolana Spolchemie	<b>FI</b>	Styrochem Finland
<b>DE</b>	BASF Bayer MaterialScience Degussa Dyneon INVISTA Jackon Lanxess LEUNA-Harze Ticona Vestolit Vinnolit Wacker-Chemie Wolff Cellulosics	<b>GR</b>	Monotez V.P.I.
		<b>IT</b>	M&G Polymers Polimeri Europa Polynt <sup>(3)</sup> SIR Industriale
		<b>NO</b>	Norsk Hydro Reichhold
		<b>NL</b>	DSM Composite Resins DSM Engineering Plastics Eastman Chemical General Electric Plastics Hexion Specialty Chemicals SABIC Europe Shell Chemicals Europe Shin-Etsu PVC Synbra Technology Unipol Wellman
		<b>PT</b>	Cires Selenis
		<b>PL</b>	Basell Orlen Polyolefins Elana subsidiary of Boryszew SK Eurochem

<sup>(1)</sup> Formerly Aiscondel

<sup>(2)</sup> Formerly Asahi Glass Fluoropolymers UK

<sup>(3)</sup> Formerly Lonza

New companies applied for membership in 2007: Anwil (PL), UAB "Orion Global Pet" (Indorama) (LT), Oltchim (RO), Rhodia (FR)

\* In addition, PlasticsEurope has more than 30 national members in Germany, Italy, France and Spain.

# PlasticsEurope Steering Board 2006

## President

John Taylor ..... Borealis ..... Chief Executive

## Vice-Presidents

John Feldmann ..... BASF ..... Member of the Board of Executive Directors

Koos van Haasteren<sup>1</sup> ..... SABIC Europe ..... Managing Director Polymers, Member of the Managing Board

Jacques van Rijckevorsel<sup>1</sup> ..... Solvay ..... Member of the Executive Committee - General Manager Plastics Sector

## Members

Robert Bornhofen ..... Vestolit ..... Member of the Management- and Investors-Committees

Kevin Boyle<sup>3</sup> ..... TOTAL Petrochemicals ..... Senior Vice President, Styrenics Business and Research

Werner Breuers ..... Basell Polyolefins ..... President Polyolefins Europe

Neil A Chapman<sup>2</sup> ..... ExxonMobil Chemical ..... Vice President, Polyethylene Global Business Unit

Josef Ertl<sup>3</sup> ..... Vinnolit ..... Managing Director

Guenter Hilken<sup>3</sup> ..... Bayer MaterialScience ..... Member of the Executive Committee - General Manager, Business Unit Polycarbonates

Jean-Bernard Lartigue<sup>2</sup> ..... TOTAL Petrochemicals ..... President

Hartmut Lueker<sup>3</sup> ..... Basell Orlen Polyolefins ..... President

Calum Maclean<sup>3</sup> ..... Ineos Polyolefins ..... Chief Executive Officer

Ignacio Marco Arbolí<sup>2</sup> ..... Repsol YPF ..... Polyethylene Director Repsol Química (Repsol YPF Group)

Hagen Noerenberg<sup>2</sup> ..... Bayer MaterialScience ..... Chairman of the Board of Management

Benjamin Palomo Sanz<sup>3</sup> ..... Repsol YPF ..... Polyolefins Business Unit Director

Massimo Paravidino ..... Polimeri Europa Benelux ..... Chief Executive Officer

Philippe Pernot<sup>2</sup> ..... Arkema ..... Executive Vice President Vinyls Products

Martin Pugh ..... NOVA Innovene ..... Managing Director

Isidro Quiroga<sup>3</sup> ..... DOW Europe ..... Commercial Vice President, Base Plastics - Europe, Middle East and Africa

Willy Schweizer ..... Eastman Chemical ..... Director Performance Polymers Business

International ..... Organization - Europe, Middle East and Africa

Layle K Smith<sup>2</sup> ..... Hexion Specialty Chemicals ..... President, Epoxy and Phenolic Resins Division

David Thompson<sup>2</sup> ..... Ineos Vinyls ..... Chief Executive Officer INEOS Films

John R Verity<sup>3</sup> ..... ExxonMobil Chemical ..... Vice President Global Polyethylene Business Unit

Markus Wildi<sup>2</sup> ..... DOW Europe ..... President

## Treasurer

Acting: John Taylor

<sup>1</sup> Elected Vice-President in 2006: K van Haasteren, J van Rijckevorsel (November)

<sup>2</sup> Left the Steering Board in 2006: L K Smith, D Thompson, M Wildi (May); N A Chapman, J-B Lartigue, I Marco Arbolí, H Noerenberg, P Pernot (November)

<sup>3</sup> Elected to the Steering Board in 2006: H Lueker, C Maclean, I Quiroga (May); K Boyle, J Ertl, G Hilken, B Palomo Sanz, J R Verity (November)





In 2006, we moved to strengthen our voice still further, drawing up a common agenda with the European Plastics Converters Association (EuPC) to improve society's understanding of plastics and enhance the public image of plastics





# Standing Committees



## European Market Research & Statistics Working Group (PEMRG)

The European Market Research & Statistics Working Group (PEMRG) brings together senior experts in market research, marketing and strategy from a cross-section of *PlasticsEurope* members.

The Group aims to deliver:

- Basic facts and figures about our industry
- Statistics to underpin integrated projects

**Chair:** M. Balsam, BASF

**Member companies<sup>1</sup>:** BASF, Basell Polyolefins, Bayer MaterialScience, Borealis, DSM Engineering Plastics, Lanxess, Polimeri Europa, Repsol YPF, SABIC Europe, Ticona, TOTAL Petrochemicals



## Fire Safety

**Chair:** R. Dewitt, Solvay

**Deputy Chair:** C. Lukas, DOW Europe



## Food Contact

**Chair:** C. Guéris, DuPont de Nemours International

**Deputy Chair:** M. Klatt, BASF<sup>2</sup>

<sup>1</sup> From April 2007 DOW Europe and INEOS are also members of the group

<sup>2</sup> New Deputy Chair from April 2007: C. Dequatre, INEOS

# Product Groups



## EPOXY RESINS

**Chair:** M. Schneiter, Huntsman Advanced Materials

**Member companies:** Hexion Specialty Chemicals, DOW Europe, EMS-PRIMID, Huntsman Advanced Materials, SIR Industriale, Cytec Surface Specialties, Spolchemie, LEUNA-Harze



## FLUOROPOLYMERS

**Chair:** L. Hoy, AGC Chemicals Europe<sup>3</sup>

**Member companies:** Arkema, AGC Chemicals Europe, DuPont de Nemours International, Dyneon, Solvay Solexis



## PC BPA

**Chair:** B. Richter, Bayer MaterialScience

**Member companies:** Bayer MaterialScience, DOW Europe, General Electric Plastics



## PET

**Chair:** A. Ciotti, Equipolymers

**Member companies<sup>4</sup>:** Advansa, Elana subsidiary of Boryszew, Equipolymers, INVISTA, M&G Polymers, NOVAPET, Selenis, SK Eurochem, Eastman Chemical, V.P.I., Wellman



## POLYOLEFINS

**Chair:** K. Abbås, Borealis<sup>5</sup>

**Member companies:** Basell Polyolefins, Borealis, INEOS, Chemopetrol, DOW Europe, ExxonMobil Chemical Europe, Polimeri Europa, Repsol YPF, SABIC Europe, TOTAL Petrochemicals

<sup>3</sup> Formerly Asahi Glass Fluoropolymers UK

<sup>4</sup> Applied for membership in 2007: UAB "Orion Global Pet" (Indorama) (LT)

<sup>5</sup> From January 2007: Pieter Platteeuw, DOW Europe



## VINYLS/European Council of Vinyl Manufacturers (ECVM)

The Vinyls Committee is the Board of the European Council of Vinyl Manufacturers, which represents the European PVC producing companies.

ECVM is also a partner in Vinyl 2010, the voluntary commitment by the PVC industry, recognised by UNEP as a partnership for sustainable development.

**Chair:** Josef Ertl, Vinnolit

**Member companies:** Arkema, Cires, Ercros<sup>6</sup>, INEOS, Hydro Polymers, LVM, Shin-Etsu PVC, Solvin, Spolana, Vestolit, Vinnolit

## STYRENICS



### ABS/SAN

**Chair:** A. Glück, BASF

**Member companies:** BASF, DOW Europe, General Electric Plastics, Lanxess, Polimeri Europa



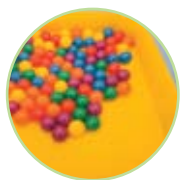
## EXPANDABLE POLYSTYRENE

**Chair:** P. Ayrey, NOVA Innovene

**Deputy chair:** J. Fischer, BASF

**Member companies:** BASF, DOW Europe, Gabriel Technologie, Jackon, Kaucuk, Monotez, NOVA Innovene, Polimeri Europa, Repsol YPF (Polidux), Styrochem Finland, Sunpor Kunststoff, Synbra Technology, Unipol

<sup>6</sup> Aragonesas Industrias y Energia



## POLYSTYRENE

**Chair:** B. Nusbaumer, TOTAL Petrochemicals

**Member companies:** BASF, DOW Europe, Kaucuk, NOVA Innovene, Polimeri Europa, TOTAL Petrochemicals



## UP RESINS

**Chair:** D. Vincent, Cray Valley

**Deputy Chair:** S. Osterwind, Ashland Chemical Company

**Member companies:** Ashland Chemical Company, Cray Valley, DSM Composite Resins, Polynt<sup>7</sup>, Reichhold, Scott Bader, SIR Industriale

<sup>7</sup> Formerly Lonza

# Working Groups



## Life Cycle Task Force

**Chair:** David Russell, DOW Europe<sup>8</sup>

**Member companies:** BASF, Bayer MaterialScience, DOW Europe, NOVA Innovene, TOTAL Petrochemicals, Vinnolit, SABIC Europe



## Packaging & Litter Task Force

**Chair:** Wolfgang Siebourg, PlasticsEurope

**Member companies:** Basell Polyolefins, BASF, Bayer MaterialScience, Borealis, DuPont de Nemours International, Eastman Chemical, Eval Europe, Polimeri Europa, SABIC Europe, TOTAL Petrochemicals



## Technical Applications Recovery Working Group (TARG)

**Chair:** Aafko Schanssema, PlasticsEurope

**Member companies:** BASF, Basell Polyolefins, Bayer MaterialScience, Borealis, DSM Engineering Plastics, DOW Europe, DuPont de Nemours International, Eval Europe, General Electric Plastics, SABIC Europe, Solvay, Ticona, TOTAL Petrochemicals, Vestolit

<sup>8</sup> Until March 2007

# PlasticsEurope Leadership Team January 2007



From right to left

<b>Wilfried Haensel</b>	Executive Director (since January 2007)
<b>Giuseppe Riva</b>	Regional Director - Mediterranean Region
<b>Jean-Pierre De Grève</b>	Executive Director - European Council of Vinyl Manufacturers (ECVM)
<b>Jan-Erik Johansson</b>	Regional Director - North Region Interim Advocacy Director (since January 2007)
<b>Peter Orth</b>	Regional Director - Central Region
<b>Hans van Doorn</b>	Interim Communications Director (since September 2006)
<b>Michel Loubry</b>	Regional Director - West Region
<b>Francisco Cimadevila</b>	Regional Director - Iberia Region (from November 2006)
<b>Klaus Vorspohl</b>	Consumer & Environmental Affairs Director

## Departures in 2006:

Former Executive Director **Nancy Russotto** retired from the Association in December 2006 after 18 years of dedication to APME/PlasticsEurope.

**Jan te Bos** steered PlasticsEurope Advocacy activities until end December 2006.

**Antonio Limones**, former Regional Director for Iberia Region, left the Association at the end of October 2006.

[www.plasticseurope.org](http://www.plasticseurope.org)

To learn more about *PlasticsEurope*, please consult our website: [www.plasticseurope.org](http://www.plasticseurope.org)







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