

## REGIONAL NEWSLINK CENTRAL REGION April 2012

Dear Colleagues,

Only a few weeks to go until the Europeans look to Poland and Ukraine – at least all Europeans interested in football. The European championships will start early June in Warsaw, and PlasticsEurope was already there. In a joint action, we successfully brought 19 journalists from eight countries to Warsaw. They visited the stadium and gathered first-hand information on building and construction with plastics and on the role of plastics in sports and leisure. This press travel really was a great success. The communications colleagues are currently working on a press kit with information, graphics and pictures that you will receive soon and may use to inform your domestic press. The football EM is also a plastics EM – and we should let the public know.

Best regards

Rüdiger Baunemann

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## 1. ETS

### **AT: Certificates in Dispute**

Traditionally, Austria has a high proportion of renewable energy, mainly hydro power, and denies nuclear power. Mid April the government decided to mandatory “label” electric power from nuclear plants – and thus tries to further reduce the fairly low proportions of this type of energy.

Nevertheless, the country promised a very ambitious further reduction of CO<sub>2</sub> emissions in the Kyoto treaty. Already starting from an advanced position makes additional improvements quite hard to realize. This is why Austria appears in the trailing position among the European countries and will have to purchase quite substantial amounts of certificates.

Forseeably, the budget is to suffer. But the Greens aren't too happy either. In the wake of economic slowdown, prices for certificates have gone down, too. So buying certificates is in most cases by far cheaper than investing in energy efficiency.

This, however, is a global problem not restricted to Austria.

*Contact: Heinz Schratt*

### **DE: Emission trading System**

The German deadline for the application for free certificates for exposed sectors was 23rd of January 2012. The German competent authority is meanwhile analyzing the applications. The European Commission has already received nine NIM-Lists (national list with all units in the boundaries of the ETS and their allocation of free certificates). The commission is expected to publish the European NIM-List end of May.

*Contact: Tina Buchholz*

### **DE: ETS-Monitoring Regulation**

The deadline for German ETS-facility operators to set up a monitoring plan is July 31 according to the German law (Treibhausgasemissionshandelsgesetz). As the European Monitoring Regulation is not finalized yet, facility operator can only prepare themselves with the latest draft of the Regulation:

[http://ec.europa.eu/clima/news/articles/news\\_2011121401\\_en.htm](http://ec.europa.eu/clima/news/articles/news_2011121401_en.htm)

An unofficial German translation of the latest draft of the Regulation can be sent upon request.

*Contact: Tina Buchholz*

### **PL: ETS and energy efficiency advocacy**

PlasticsEurope Polska has submitted a position paper related to recent discussions in EU institutions on modification of regulations on energy efficiency and on ETS system. The position paper was addressed to relevant persons in the Ministry of Construction and Transportation and to Polish Members of European Parliament working in the ENI and ITRE commissions.

*Contact: Kazimierz Borkowski*

## 2. Climate Protection & Energy Efficiency

### **CZ: Suggestion of Energy Efficiency Resolution**

The Association of chemical of Industry contact Czech's EU parliament members in issue new Energy Efficiency Resolution namely in point set – aside and request vote against this suggestion. Because this point would led to direct or indirect increase cost of energy. Mr. Novak sent the letter the EU parliament members and he tray explain position of the chemical industry toward ETS, set – aside.

*Contact: František Svoboda*

### **DE: IGBCE project resource efficiency**

The joint project of PlasticsEurope Deutschland, GKV and IGBCE reaches the closing phase. The interviews with enterprises in the plastics value chain are finalized during these weeks. These are the basis for deduced recommendations regarding resource efficiency at production. The results will be presented during the final workshop on June 28 in Hannover.

*Contact: Ingo Sartorius*

### **DE: Meeting of WP Bio-Plastics of IK Industrievereinigung Kunststoffverpackungen e.V.**

The meeting on 13 March of the plastic packaging association's WP focused on the guest lecture by Dr Harald Käß (narocon Innovation Consulting and board member of European Bioplastics). He gave a comprehensive update on European and national policies on packaging from bio-plastics (packaging regulation, bio-waste ordinance, bio-economy, carrier bag discussion). Further topics were the newly set up standardization initiative CEN/TC 411 "Bio-based products", the launch of the world market study "Bio-based plastics", and the current situation for the Danone yoghurt cup from bio-based plastics.

Contact: Sabine Lindner

#### **DE: 5th International Congress on Bio-based plastics and Composites on 14/15 March in Cologne**

The 5th International Congress on Bio-based plastics and Composites attracted 110 participants from 15 countries and once more reaffirmed the role of this event as a meeting place of the industry. Scandinavia, Italy and Germany were in the focus 2012. The organizer nova-Institut and the sponsors Proganic and Coperion were satisfied with the recent developments and lively discussions. Innovation awards went to the companies Naporo, Martin Fuchs Spielwaren and Resopal.

Bio-materials – i.e. bio-based plastics and composites – are increasingly holding their own in the market. They are becoming more and more important in the pursuit of a bio-based economy, which will one day fully replace petrochemistry. Companies like Novozymes (Denmark), Borregard (Norway), Novamont (Italy), Bayer MaterialScience (Germany), Evonik (Germany) and Henkel (Germany) presented their concepts for bio-refineries, new bio-polymers and natural fibre-reinforced composites.

Contact: Sabine Lindner

#### **PL: Greenpeace protest**

Greenpeace Polska has organised a protest against utilising wood as a fuel for boilers using biomass for co incineration and against public subsidies for burning wood. Among others in daily newspaper the adverts attacking Minister of Economy have been published. The Ministry of Economy is currently working on changing rules of RES (Renewable Energy Sources) subsidising towards reduction or cancelling subsidies for wood-based biomass and increase of subsidies for modern expensive technologies (e.g. photovoltaics). PlasticsEurope Polska has been advocating for recognition of energy obtained from waste as RES.

Contact: Kazimierz Borkowski

#### **SK: Thermal Insulation of Buildings in Slovakia**

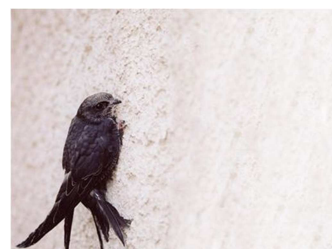
According to the estimate of the Slovak Association for the Thermal Insulation of Buildings, 25.9 per cent of flats have been renovated (insulated with expanded PS and/or mineral wool) in Slovakia during the last 18 years, of which 20.2 per cent are the family houses, 31.9 per cent are the blocks of flats. According to the Population and Housing Census conducted in Slovakia in 2011, there are to be insulated other approximately 570 thousand flats and around 620 thousand houses built before 1992. The number of insulated blocks of flats increased a little in the recent years. In average there are around 38.5 thousand flats renovated each year. This way there is possible to renovate all the flats till 2030.

Source: *Hospodárske noviny (Economy News) daily, 3 April 2012*

Contact: Silvia Surová

#### **SK: Thermal Insulation and Protection of Birds**

We would like to inform on the article titled "Swifts Perished by Thermal Insulation", published by the Pravda daily on 16 April 2012. The article reads that thermal insulation of buildings has negative impact on the population of swifts (birds similar to swallows). The number of swifts in Slovakia decreased by around one half. The project has been launched by Slovak environmentalists to save the birds. The teams of experts are forming in order to cooperate with the housing cooperatives and the owners of block of flats to draw their attention to the occurrence of



the protected species of birds. The social value of one a swift is €165. There is possible to save the birds by special shelter boxes built in the façade. The average costs for one block of flats vary around €400, installation including. According to the article, the population of swifts declines significantly also in Poland and in the Czech Republic. If the trend will continue, the people will feel the problem on their own skin as swifts feed on insects, mainly gnats (mosquitoes).  
*Contact: Silvia Surová*

### 3. Waste Framework Directive Transposition

#### **DE: New act for electrical appliances**

Due to the new European directive of the RoHS Directive (Restriction of Hazardous Substances) for electrical products from June 2011, the German Ministry of Environment has drafted a new act for electrical goods. This became necessary since the legal basis was modified during the Recast of the European RoHS and WEEE Directives.  
*Contact: Ingo Sartorius*

### 4. Plastics Waste Management

#### **AT: The Only Way to Reduce**

"The only way to reduce **the enormous mountains of plastics waste** is to ban fossil based shopping bags" says .... the environmental spokesperson of Lower Austria's conservative party. A resolution in the regional parliament addresses the minister for environment (also conservative) to drive the EU into allowing such ban.

Well, environmental spokespersons from Austrian conservatives usually have an agricultural background, not a scientific or an industrial one.

Together with the Chamber of Commerce, PlasticsEurope Austria and two member companies are trying to educate the national environmental spokesperson about the value of plastics and about the actual height of the shopping bag mountains.

*Contact: Heinz Schratt*

#### **PL: Advocating issues in Warsaw**

Polish municipalities and regions work intensively in order to prepare waste management plans following the new law that requires new approach to waste management as of July 2013.

Representative of PlasticsEurope Polska participated in a meeting on advancement of preparations to new waste management organised by Warsaw Council and Warsaw City Authorities. Among invited guests were entrepreneurs and NGOs. The representative of Warsaw City Authorities explained the obligations that the City Council has to fulfil till the end of 2012: take decisions on the scope of the new waste management system that will be imposed in Warsaw (all area or only inhabited) and on the method of calculation waste tax (based on number of persons in the household or based on the water consumption). PlasticsEurope Polska is conveying the message of increasing plastics recovery rate by applying economic and adapted to existing infrastructure solutions to collection and recovery systems.

*Contact: Kazimierz Borkowski*

#### **PL: Technical conference on selective waste management**

Almost 180 representatives of Polish communities and regions, recyclers and waste management companies participated in national conference "Selective collection of waste, its segregation and recycling" organized in Gorzów Wielkopolski on 22-23rd March. This conference was one of a series of events on waste management with PlasticsEurope Polska partnership. The new act on the cleanliness and order in communities (transferring ownership of waste) prefers selective collection (at preferable costs) and representatives of communities shared their experiences in introducing and implementing various models of collection (e.g. two bin or three bin). Others presented models of calculation "fee for municipal waste management" and legal duties for communities in regards of selective collection. Conference

was an excellent opportunity for networking with value chain stakeholders and talking with some partners about their involvement in Identiplast 2012.

*Contact: Grzegorz P. Rękawek*

#### **PL: Waste incinerator plants tenders in Bydgoszcz, Krakow and Szczecin**

Polish company Mostostal Warszawa SA has won three tenders to design and build municipal waste incineration plant in Krakow, Szczecin and in Bydgoszcz. The tender winner has to build the cogeneration plants for 180 kt/yr capacity (Bydgoszcz) in 2014, 220 kt/yr (Krakow) and 150 kt/yr (Szczecin) by the end of 2015. These projects are the first out of 6 bigger projects that have been accepted for implementation in Poland last year (the others are: Poznan, Białystok, Konin). It is estimated that by the end of 2015 Poland should have in operation at least 1 million tons of incineration capacities.

*Contact: Kazimierz Borkowski*

#### **PL: Recycling Competition**

Representative of PlasticsEurope Polska has participated in a meeting of the Convent of Recycling Competition organised by Abrys company and National Fund of Environment. The Convent is composed of several persons representing key companies and organisations working with municipal waste issues and promoting the idea of recycling and recovery (waste operators, recovery organisations, NGOs). Following the fundamental change of national waste regulations the convent has decided to work together in order to prepare new rules of the competition.

PlasticsEurope Polska has been supporting for 6 years this competition as a partner promoting education on the value of plastics and proper behaviour with plastics waste.

*Contact: Kazimierz Borkowski*

#### **SK: Alternative Source of Energy from Waste Plastics**

The municipality of Trnava (the county town in south-west Slovakia) is constructing a new energy-from-waste plant. The project was approved by the Ministry of Environment of the Slovak Republic in November 2009. The financial support of € 3 million has been granted from the funds of the EU. The production line with the capacity of 23 tons per hour will produce solid pellets of the diameter up to 40 mm. The pellets will be formed from municipal wastes – textile, paper, various plastic materials including PET bottles. The operation of the line will start by the end of this year.

*Source: Hospodárske noviny (Economy News)daily, 12 April 2012)*

*Contact: Silvia Surová*

#### **SK: Ecorec Launches the New Plant in April 2012**

ECOREC (eco-logical recovery) Slovensko Ltd., the Slovak branch of the international company, opens the new production line for ecological disposal of various sorts of waste materials near the county town Pezinok, south-west Slovakia.

The pellets made of non-recyclable materials – textile, paper, plastics, wood, composites, will be used as the alternative sources of energy.

*(Source: TREND weekly, 22 March 2012)*

*Contact: Silvia Surová*

### **5. Ecolabelling & Green Public Procurement**

### **6. Packaging**

### **7. Consumer Protection**

#### **AT: Baby Bottles Revisited**

The JRC's study on migration from "alternative material" baby bottles after the BPA ban, revealed disturbing facts. One brand even released considerable amounts of BPA from PA bottles.



So BPA was in the media again. PlasticsEurope Austria was invited to comment on the situation in a consumer magazine on TV at 18:30, and so did the Friends of the Earth (Global 2000).

The country's largest tabloid "KRONE" warned mothers and suggested to turn to glass bottles for safety reasons.

This was taken as an opportunity in order to negotiate some positive articles about plastics products and producers in the near future. We shall see...

*Contact: Heinz Schratt*

#### **AT: Xeno Hormones**

So far the (ongoing) project has been successful in establishing a set of procedures, comprising both in-vitro-assays and analytical methods, that yield a clear picture of the biological (mainly estrogenic) activities of migrates as well as the causative substances. In a next step additional in-vitro-assays are to be developed with a special focus on thyroid activities.

Further, the throughput of probes needs to be raised to a higher level. Thus allowing for realistic market screening of specific packaging products.

*Contact: Heinz Schratt*

#### **DE: Meeting of the subgroup of the Joint Working Group of the Drinking Water Commission of the Federal Environment Agency (U-KTW AG) to deliberate on TPE transitional recommendation**

The agenda of the U-KTW AG meeting on 21 March in Berlin included the discussion on the new elastomer guideline and first experiences of test institutes with the new recommendation. A further agenda item was the discussion about a transitional recommendation – as drafted by the Federal Environment Agency (UBA) – for the hygiene assessment of TPE products in drinking water contact. This recommendation is intended to open up the possibility for manufacturers of certain products from TPE (i.e. those for which data are available to the UBA) to obtain test certificates for their products. Our association advocated the recommendation not to become effective on 1 April but to postpone its entry into force and to wait for the results of the TPE workshop.

*Contact: Sabine Lindner*

#### **DE: Meeting of joint committee for drinking water contact materials – Gemeinschaftsausschuss Trinkwasserkontaktmaterialien**

The meeting of the above joint committee of PlasticsEurope Deutschland e.V. on 22 March in Frankfurt focused on the discussion about industry's position on harmonization and the 4-Member-State-approach for drinking water contact materials. Also discussed were the current status of the revision of the KTW (Drinking Water Commission) guideline for plastics in drinking water contact, the planned TPE guideline as well as the draft for a transitional recommendation TPE (see above).

The joint committee took the view that talks should be sought with UBA delegates prior to the next U-KTW-AG meeting on 3 May 2012. Now these talks are scheduled for 19 April.

*Contact: Sabine Lindner*

#### **DE: Meeting of DIN AK "Safety of toys – chemical properties" in Berlin**

At the 17th meeting of the NA 095-05-01-02 "Safety of toys – chemical properties" in Berlin, the chair Dr Reindl pointed to the change in the toy safety directive regarding limit values for cadmium and to the public consultation of the European Commission on limit values for lead. The experts discussed the current document of EN 71-7 "Safety of toys – part 7: Finger paints; requirements and test methods" and the problems in part EN 71-3: "Migration of certain elements" in the methods development for chromium (VI). In this matter, a letter with proposals for the further course of action was sent to the European Commission. In its response, the Commission did not make any indications on the technical side. Consequently, for the time being an improvement of the method for achieving the limit values is being striven for and an application for extension can be made, if necessary. The experts discussed the reply from the

Commission. An exclusion of chromium (VI) determination from EN 71-3 would make it easier to harmonize the standard but this would not solve the real problem – i.e. conformity of products as regards the Cr(VI) limit value under Directive 2009/48/EC.

Dr Reindl drew the attention to information on “Mouthing Behaviour of children over three years”. Based on this information, the note on the age limit of six years is maintained in the scope. Concerning the requirements to elements and skin contact, an appraisal by the CEN consultant will still need to be taken into account at European level.

For the time being, the German proposal for an exemption of hard plastic has not been included in the draft standard, but mention of relevant activities is made in the introduction. After completion of the activities, the CEN/TC 52/WG 5 will once more discuss this subject. In EN 71-12 “Safety of toys – part 12: N-nitrosamines and N-nitrosatable substances”

Dr Bidmon informed about the ongoing round robin test, focusing on results from his studies on migration time of N-nitrosamines and N-nitrosatable substances from elastomers. Dr Bidmon explained that these results do not enable any clear conclusions on the needed migration time.

Contact: Sabine Lindner

### **DE: BUND claims: Plasticisers are fattening!**

On 20 March BUND Friends of the Earth Germany published a literature study on a possible connection between substances such as bisphenol A and the occurrence of obesity and diabetes – under the catch phrase “Fattening plasticisers” and together with graphs and pictures and the full original English-language version of the “Review of the Science Linking Chemical Exposures to the Human Risk of Obesity and Diabetes”. For details see the BUND homepage:

[http://www.bund.net/themen\\_und\\_projekte/chemie/chemie\\_und\\_gesundheit/krank\\_durch\\_chemikalien/hormonelle\\_schadstoffe/](http://www.bund.net/themen_und_projekte/chemie/chemie_und_gesundheit/krank_durch_chemikalien/hormonelle_schadstoffe/)

According to the BUND, the study by the British environment organisation ChemTrust arrives at the conclusion that burdens from synthetic chemicals on humans – such as bisphenol A, plasticisers or flame retardants – can lead to obesity and diabetes; the study is presented today at the same time in Berlin, Brussels and London. These chemicals are claimed to be contained in everyday products like plastic toys, electrical devices, PVC floorings and food cans, reaching the human body through breathing air, skin or food.

The Working group PVC and environment e.V. (AgPU) has developed a first position (in German language):

<http://www.agpu.com/service/news-single/artikel/erste-stellungn.html>

A position (in German language) on these allegations is available from PlasticsEurope too:

<http://bit.ly/HN6WI9>

Contact: Sabine Lindner

## **8. Communications**

### **CZ: Project Eco – Profile GPPS and HIPS**

I have completed the questioner for GPPS/HIPS units. Description of use raw materials (quantity), technology, energy consumption, types. We start discussion about production of styrene monomer which use for production of the compact plastics. We compare the model styrene calculation according GaBi database or PE database (2005).

Contact: František Svoboda

### **DE: Day of Information for the Technical Press of the Central Region**

17 plastics journalists from Germany, Austria, Hungary, Czech Republic and of course from Poland now came to the traditional day of information held in Frankfurt. The yearly events has been started more than 10 years ago.

This time, presentations were given by Dr. Tina Buchholz, Dr. Ingo Sartorius, Tanja Rühl, Kurt Stepping, Frank Schnieders and Claus-Jürgen Simon, Dr. Onno Groß and Dr. Wilfried Haensel. Groß and Haensel both spoke about marine litter, but from different angles. Groß is



with Deepwave e.V. He furnished the NGO's view. Wilfried Haensel spoke about the ongoing activities of the plastics industry to fight marine litter.



All presentations were held in German language. They are available in Frankfurt.  
*Contact: Michael Herrmann*

#### **DE: EU-Youth parliament final: Nice echo in the German press**

The Youth Parliament Debates final held in Rome has provoked a very nice echo in the German press. As reported, 50 youngsters from 5 nations had discussed with each other in Rome about plastics and its future role. The winner was Svetoslav Kostov from Bulgaria. The German press agency (dpa) picked up the German press release and sent it to virtually all German newspapers. This resulted in good online coverage. On top, Frankfurter Neue Presse (FNP) contacted a German participant via PlasticsEurope. A long article with a nice picture was the result.



*Contact: Michael Herrmann*

#### **EU: Plastics for Euro 2012 – International press tour to the National Stadium Warsaw**

An amazing stadium, three interesting lecturers, six experts and 19 journalists from 8 European countries – these were the main ingredients of the successful PlasticsEurope press tour to Warsaw National Stadium. Thanks to PlasticsEurope, journalists had the opportunity to make their own impression of the place where will take place the opening match of the UEFA European Football Championship 2012. In the real impressive Warsaw stadium scenery the leading construction engineer Knut



to

Goeppert and Professor of Architecture Roland Burgard explained the construction and design details of the stadium and the indispensable role of plastics as construction materials in modern sport infrastructure. Both experts as well as Polish architects Mariusz Rutz and Adam Mandrysz, the membrane roof experts, were available for journalists' questions also during the guided tour through the stadium, led by Leszek Miara, the construction supervisor of the stadium. He guided the group from pitch level to the highest circle just underneath the membrane roof, explaining the construction history and details. The membrane roof was opened and closed just for the journalists to show how long it takes to make the pitch safe from rain or snow.

The tour ended in the modern press centre where Michael Herrmann (PlasticsEurope Germany) presented the influence of innovative plastics material on nowadays sport equipment (shorts, shoes, balls etc.) as well as athletes' contest results, not only in football. The presentation was preceded by Dick Stolwijk's (President of PlasticsEurope Polska) short introduction with basic economic data to the "plastics world".

Press and TV journalists from Croatia, Denmark, Greece, France, Germany, Italy, Poland and the UK had the exclusive opportunity to interview the experts of stadium construction directly

on the ground where later football stars as Cristiano Ronaldo, Wesley Sneijder or Mesut Özil will end up fighting for the title.

The press kit prepared by PlasticsEurope in English and Polish language comprised of many interesting background information, photos, and also exclusively a graphic highlighting the presence of plastics in sport arenas in general.

*Contact: Michael Herrmann*

### **PL: Annual networking forum – Polish plastics industry meeting**

For the fourth time PlasticsEurope Polska together with Polish Union of Plastics Converters has organised the annual meeting of plastics industry. Held on April 19 in Warsaw under the slogan: “Plastics industry in Poland – perspectives, innovations, challenges” the meeting gathered about 90 leading representatives of the Polish plastics industry both producers and converters, together with invited guests from PlasticsEurope, EuPC, national administration, science and plastics industry press. This year the meeting was focused on the condition of plastics industry in Poland and in Europe. Polish plastics industry was presented by Dick Stolwijk (President of PlasticsEurope Polska and Tadeusz Nowicki (Polish Union of Plastics Converters). Interesting presentation on alternatives for plastics feedstocks (P. Rejewski) was preceded by a hot topic in 2012 – plastics innovations in sport – presented by R. Baunemann (PlasticsEurope Deutschland). Alexandre Dangis from EuPC pointed out the present challenges for the industry and expected EU activities towards more regulations for plastics. His presentation was followed by panel discussion entitled “Improving plastics image”, in which were raised such issues as: proper and early education about plastics role in to society role of individual companies in this process. The participants acknowledged unanimously that poor waste management systems definitely deteriorate plastics image and that plastics industry has to advocate for better systems with more plastics waste collected and recovered. Wilfried Haensel, one of the panellists, underlined the necessity for the whole plastics community to speak with one voice to secure the interest of the industry.

The meeting was very well perceived by the participants as a source for enhancing awareness of important industry issues as well as good opportunity for networking.



*Contact: Kazimierz Borkowski*

## **9. Economy and Trade - “Trade-related Issues”**

### **EU: Current business situation of the plastics industry in Europe (EU27)**

Overview: The positive development of the EU27 Plastics Industry after the bounce back from the great recession continued until the beginning of 2011. Since the 2nd quarter 2011 Primary Plastics showed decreasing tendencies, but now remains stable since November 2011. Also Plastics Products remains more or less stable since mid 2011. The Plastics Machinery sector grows further on at the beginning of 2012.

Sectors: Across sectors, developments in 2011 were somewhat uneven. Production quantities of Primary Plastics showed primarily decreasing tendencies in 2011, but now remain stable since November 2011. The Plastics Products sector further on remains more or less stable during the last months and the Plastics Machinery sector continues its growth.

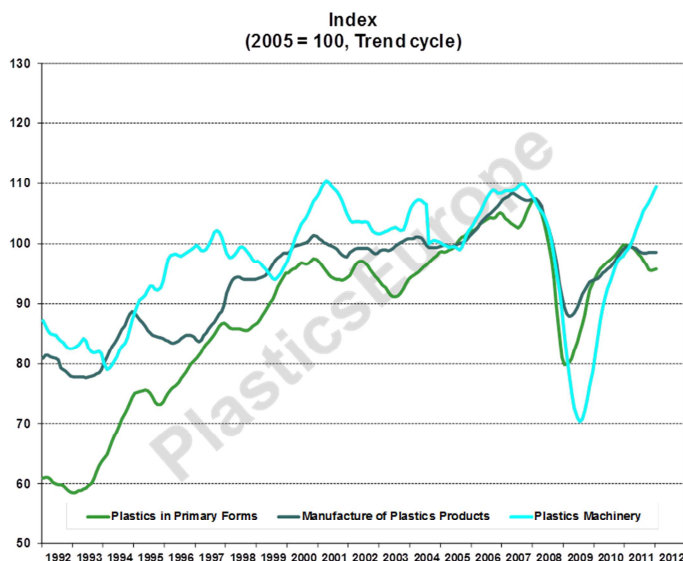
Plastics Industry producer prices develop quite differently at the end of 2011 and beginning of 2012. Prices for Primary Plastics show primarily decreasing tendencies in the last months, but remained stable in January 2012. Plastics Products prices remain on a stable level and Plastics Machinery prices continue to grow.

**End use Industries:** The upward trend in the Electrical Machinery Industry continues after a short period of stagnation in the third quarter of 2011. Upward trend the Automotive sector came to an end in the third quarter of 2011. Production figures for the construction industry grow slightly since the beginning of 2011 after 4 years with primarily decreasing tendencies. Production in the more crisis-resistant Food and Beverages sector also shows a slight but steady growth.

**External Trade:** Total export quantities of Primary Plastics have reached its peak at the end of 2010. The first half of 2011 showed decreasing export tendencies, but since the second half year export quantities remain on a stable level. Exports of Plastics Products develop in a quite similar way: Decreasing tendencies in the first half of 2011 and constant to slightly increasing tendency since mid 2011. Total import quantities show primarily decreasing trends both for Primary Plastics and Plastics Products.

**Outlook:** Production figures for end of 2011 and beginning of 2012 show a continuing growth trend for the Plastics Machinery sector, but stable development for Primary Plastics and Plastics Products. The same applies to latest available producer price indices from January 2012: Growing prices for Plastics Machinery and signs of a stable development for Primary Plastics and Plastics Products.

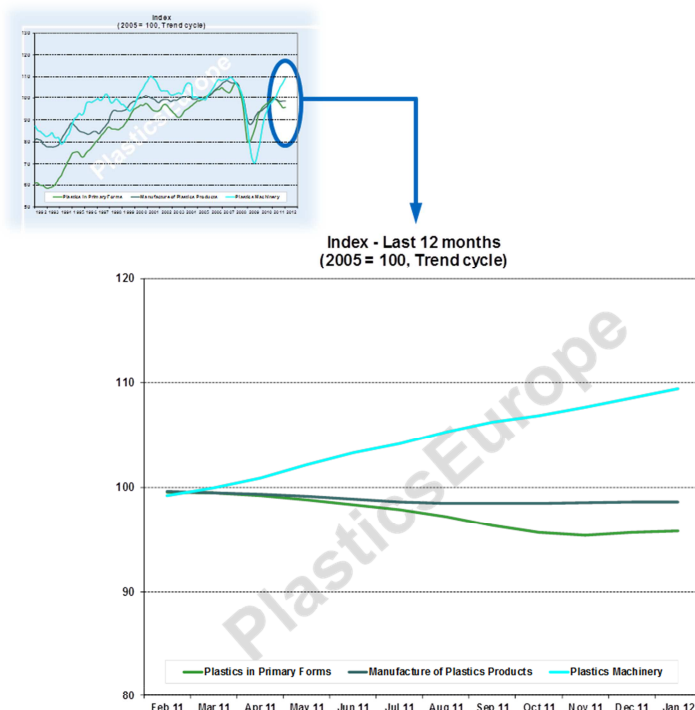
## European Union (EU27) Plastics Industry Production



### Plastics Industry Production by long term view (1992-2011):

- Long time series shows strong growth for production of Primary Plastics and Plastics Products during the 1990's and a more sideways development from 2000 to 2005. Plastics Machinery shows a more fluctuating development in long-term view.
- After strong growth in all the three segments in 2006 and more constant development in 2007, the effects of the economical crisis are clearly recognizable in 2008 and first half of 2009.
- Economic recovery since mid 2009 in all the three segments: Plastics in Primary Forms, Plastics Products and Plastics Machinery.

## European Union (EU27) Plastics Industry Production



Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

### Plastics Industry Production by short-term view (last 12 months):

- Strong growth of Plastics Machinery sector also continues at the beginning of 2012.
- The development of Plastics Products production shows a sideways movement during the last months.
- The decline in production figures for Plastics in Primary Forms seems to have stopped at the end of 2011.

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## European Union (EU27) Plastics Industry Production

Production Index (working day adjusted)

Sectors	Jan 12 Index 2005 = 100	Jan - Dec 11 Index 2005 = 100	Jan 12 y-o-y (%)	Jan - Dec 11 y-o-y (%)
Primary Plastics	96,8	97,5	-3,3	0,7
Plastics Products	95,0	98,8	-0,7	3,1
Plastics Machinery	97,7	103,7	15,7	11,2

Production Index (Trend cycle)

Sectors	Oct 11	Nov 11	Dec 11	Jan 12
	Change in % against previous month			
Primary Plastics	-0,7	-0,2	0,2	0,1
Plastics Products	0,0	0,1	0,0	0,0
Plastics Machinery	0,6	0,7	0,8	0,8

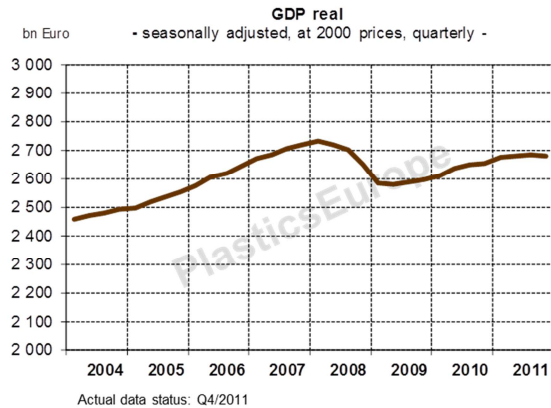
- The year 2011 showed increasing production figures compared to 2010. The strongest increase by far was recorded for the Plastics Machinery sector with +11,2%. Production of Plastics Products increased by 3,1%, while Primary Plastics recorded a slight growth of 0,7%.
- In January 2012 Plastics Machinery production increased again by 0,8% compared to previous month. Thus the upward trend continues.
- Production of Primary Plastics and Plastics Products with a more or less constant development in January 2012.

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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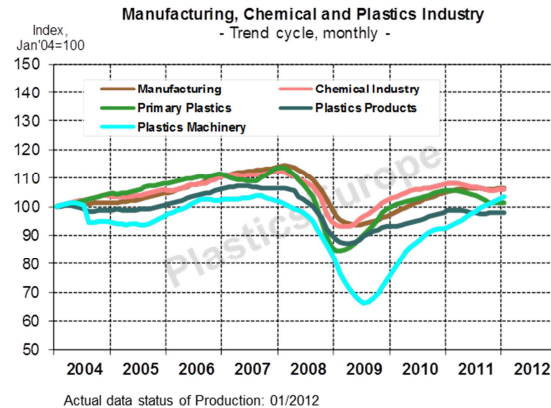


## European Union (EU27) GDP, Chemical and Plastics Industry



- EU27 GDP increased by 1,5% in 2011, compared to 2010.
- In the fourth quarter of 2011 the GDP decreased by 0,3% compared to third quarter.
- Actual estimations of Eurostat for EU27 GDP growth rates (year on year):  
2012: +/-0%, 2013: +1,5%

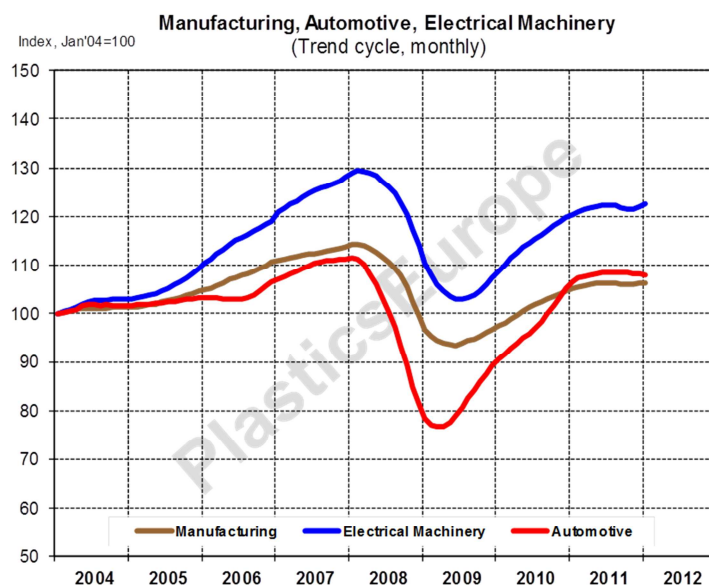
Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)



- Uptrend in the Chemical Industry as well as in Total Manufacturing has lasted until the first quarter of 2011. Since then, Manufacturing with a sideways movement and Chemical Industry with slightly decreasing tendencies. The latter recently with slight growth again.
- Also, slight downward trend in the second half of 2011 for production of Primary Plastics until the end of the year. While Plastics Products showed a more or less constant development, Plastics Machinery with continuing growth.

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## European Union (EU27) Plastics Customer Industries - Part I

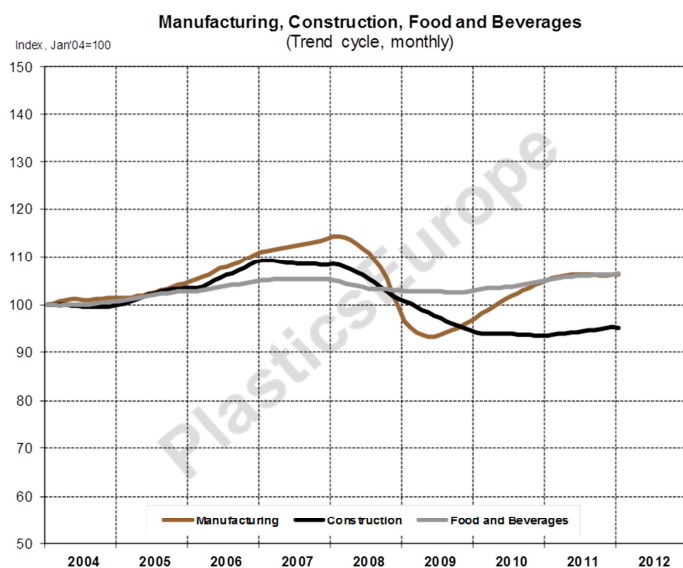


- Continuing recovery in the EU27's Manufacturing Industry since 2009, but with more sideways tendency since the second quarter of 2011.
- After strong growth especially in 2009 and 2010, the second half year 2011 showed first slightly decreasing tendencies in the Automotive industry.
- Upward trend in the Electrical Machinery Industry continues after a short period of stagnation.
- Industrial production activity in the EU27 is still below the pre-crisis level.

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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## European Union (EU27) Plastics Customer Industries - Part II



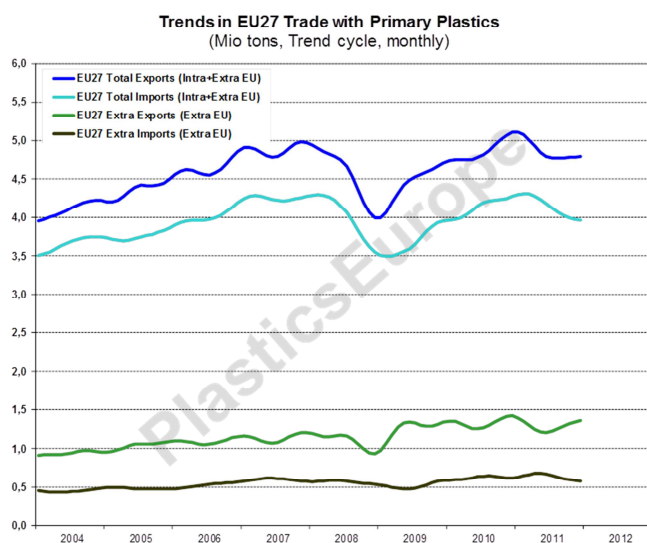
- Increasing development in the Construction Industry since the beginning of 2011.
- The Food and Beverages Industry was less hit by the recession than other industries.
- Sideway movement in production figures of the Manufacturing Industry since mid 2011.

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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## European Union (EU27) Trade Primary Plastics



Actual data status of EU27 Trade: 12/2011

Intra EU Trade: Trade between the Member States of the European Union

Extra EU Trade: Trade of the European Union with Non-Member Countries

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

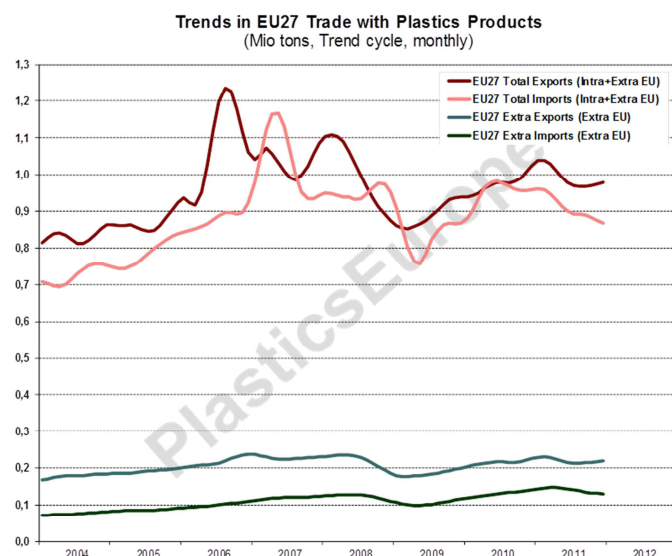
- Total EU27 Export quantity of Primary Plastics has reached its peak at the end of 2010. The same applies to EU27 Extra Exports.
- Import quantities from Extra EU27 showed a slightly decreasing trend in the 2nd half of 2011 as well as Total Imports.
- During the last years the Extra EU Import share grew to 15,1% in 2010. 2011 showed a slightly higher rate again with 15,4%. The Extra EU Export share in 2011 was slightly lower than in 2010 (26,5% in 2011 compared to 27,3% in 2010).

**Extra EU Trade - Primary Plastics**  
Share in Total (%)

Year	Exports	Imports
2004	23,0	12,2
2005	23,8	13,0
2006	23,5	13,2
2007	23,2	14,2
2008	24,1	14,2
2009	28,4	14,1
2010	27,3	15,1
2011	26,5	15,4

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## European Union (EU27) Trade Plastics Products



Actual data status of EU27 Trade: 12/2011

Intra EU Trade: Trade between the Member States of the European Union

Extra EU Trade: Trade of the European Union with Non-Member Countries

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

- After two years of Total Exports growth, quantities in 2011 showed primarily decreasing tendencies. Since September 2011 Total Exports grow again. Total Imports show a primarily decreasing trend in 2011.
- Extra EU Imports and Extra EU Exports increased in 2009 and 2010, but now show more or less constant tendencies.
- The share of Extra EU Imports and Extra EU Exports increased over the last years.

**Extra EU Trade - Plastics Products**  
Share in Total (%)

Year	Exports	Imports
2004	21,5	10,6
2005	22,1	11,1
2006	20,0	11,4
2007	21,9	11,5
2008	22,0	12,9
2009	20,8	12,9
2010	22,0	13,7
2011	22,1	15,4

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The above data are taken from the database of PEMRG (PlasticsEurope Market Research Group). This database provides key data from the plastics industry for all Member States of EU27, resorting to official European statistics (Eurostat).

Contact: *Claus Simon (PED) and Frank Schnieders (Bayer MaterialScience)*

## 10. The Association

### **CZ: Information No. 1- Association of Chemical Industry of the Czech Republic**

We are going to prepare information about the chemical industry in the Czech Republic. The entry for this Information contains three parts:

Legislations which touch of plastics, information from Plastics Technology Platform, Marketing information about plastics market in EU for 2011 year.

Contact: *František Svoboda*

### **DE: Meeting of Fire Safety Committee**

The German fire safety committee met in Frankfurt on 21 March. Key issues on the agenda were national and European activities for coordination as well as concrete issues such as fire protection for insulation, vehicles, the building directive and standardisation.

Contact: *Rüdiger Baunemann, Ingo Sartorius*

### **DE: Annual reception of VCI in Berlin**

On 28<sup>th</sup> March VCI (German chemical industry's association) held their traditional reception in Berlin's Hotel Adlon hosting more than 400 guests from member companies (e.g. Josef Ertl, Vinnolit, or Dennis McCullough, BMS; Ingo Sartorius or Claus Simon, PlasticsEurope Deutschland; Martin Engelmann, PlasticsEurope), Deutscher Bundestag (encompassing several MEPs from our network) and Federal government. The evening event once again was a big success.

Contact: *Michael Hillenbrand*

### **HU: Hungarian Plastics Association**

Since the very beginning the Association of Hungarian Plastics Industry (AHPI) was a part of the Hungarian Chemical Association (Magyar Vegyipari Szövetség, MAVESZ), without independent legal status. Practically we had own membership, own General Assembly, Board, budget, etc but haven't been independent. We had to harmonise all the main issues with the actual director of MAVESZ. For this period this situation caused some difficulties therefore our Board has initiated the legal process to be an independent association.

After two establishing assemblies, a lot of ordination, coordination, preparing different kind of papers for different kind of purposes... hereby we can kindly inform that we received all the necessary papers.

Last but not least, as an independent association we hereby confirm our intent and our interest in the cooperation with PlasticsEurope on.

New legal name in Hungarian: Magyar Műanyagipari Szövetség, abbreviation: MMSZ

New legal name in English: Hungarian Plastics Association, abbreviation: HPA

Contact: *Peter Ollar*

### **SK: Board Meeting of ZCHFP SR**

On 27 March the Board Meeting of the Association of Chemical and Pharmaceutical Industry of the Slovak Republic was held in Bratislava.

There were following main points of the agenda:

- The ChemLog Project – information on the 1<sup>st</sup> part of the project finished in 2011, the 2<sup>nd</sup> period starting in 2012
- Information on the finalization of the 1<sup>st</sup> Semester of NANOFORCE Project, continuation of the Project by its 2<sup>nd</sup> Semester in 2012

- Information on the seminar Seveso III (held on 1 March 2012) and the seminar Social dialogue and long-life education (held on 22 March 2012)
- Information on the Cefic AFEM Meeting that will take place on 9 and 10 May 2012 in Bratislava
- Information on the project in preparation – REACH for SMEs
- New members approval.

*Contact: Silvia Surová*

## 11. Further topics

### **DE: The future of risk based regulation**

On 21 March German liberal MP Dr. Lutz Knopek discussed “the future of technology regulation according to hazard, risk and the precautionary principle” with Prof. Löfstedt, King’s College London, and Prof. Renn (University of Stuttgart) in Berlin. The breakfast was hosted by Burson-Marsteller and involved German MPs Dr. Petra Sitte (leftist) and Dr. Christel Happach-Kasan (liberal) who discussed with Dr. Christian Grugel, BMELV or Dr. Mathias Greiner, BfR and others the precautionary principle: how it can be used, not misused and how to communicate about uncertainty. “We quickly find scapegoats but they will be no remedy,” said Prof. Renn. The public would take into account risk and benefits only when industry representatives could be trusted. So trustworthiness and confidence were once again identified to be the key resources in the risk debate.

*Contact: Michael Hillenbrand*