

REGIONAL NEWSLINK CENTRAL REGION July 2012

Dear Colleagues,

Summer moved on, and at last it arrived in Germany, too. While we are looking to London to the Olympic Games, crossing the fingers for our athletes from the industry sponsoring initiative "Team Kunststoff", the Euro crisis is still high on the agenda. Also topics like resource efficiency and climate change keep the European politicians busy. Projects to strengthen resource efficiency in our industry are therefore very important in the actual discussions. For this reason, PlasticsEurope is always on the run to confront stakeholders, opinion leaders and politicians with our proposals and the advantages, plastic products are offering to save our planet.

What is also needed in times of growing resistance, is to maintain the good relationships with our partner associations. The last month brought in some fine examples for such close cooperation. More than 60 participants informed themselves in Frankfurt in a seminar on "PVC and environment" about how PVC contributes to sustainability and the saving of energy. The workshop was organised by AgPU (Working group PVC and environment) and PlasticsEurope. Also in Frankfurt, a seminar was held on the use of thermoplastic elastomers in products of daily use and in contact with drinking water. In this case, the invitation came from WdK (organisation of the German manufacturers of tyres and technical elastomers products) and PlasticsEurope. I hope that there will be many more projects alike to come.

Best regards

Rüdiger Baunemann

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1. ETS

DE: European Monitoring Guideline for ETS-installations published

The new monitoring and reporting guideline for ETS-installations for the third trading period starting 2013 was published July 10th by the European Commission. Installations that take part in the ETS have to monitor their emissions according to a monitoring plan. This plan has to be set up by the company and has to be proven by the respective competent authority of the member state. In Germany the deadline for submission to the "Deutsche Emissionshandelsstelle" is July 31st. This is regulated in the German law "Treibhausgasemissionshandelsgesetz", but the German competent authority enlarged the deadline until end of August. But then the company has no right to receive the notification before end of 2012. Installations that are not in the ETS, e.g. German polymerization units, do not need a monitoring plan.

Contact: Tina Buchholz

2. Climate Protection & Energy Efficiency

CZ: EPBD II implementation to law

On the base information from Mr. Zemene (Czech association EPS) who sent me information about EPBD II and this implementation to CZ law.

1. Two years they have prepared in frame chamber together with Ministry of industry change of law no 406 and next regulation.
2. 24th week parliament start discussion and agree the change of law No. 406 and then going to second chamber CZ parliament (senat)
3. Association of EPS cooperate on calculation optimum cost level for Ministry of industry.

Contact: František Svoboda

DE: Energy efficiency directive: discussion about too many certificates in the market

A wrong number of total certificates in the market is communicated in the media within the discussion about a set-aside of ETS-certificates via the energy efficiency directive and the auctioning directive to rise the price of ETS-certificates. German chemical industry analyzed that the balance of emissions and certificates in the EU is evened. We rather have a bit to less certificates than emissions. Including CDM-certificates in this balance is not conform to the ETS-rules: A real financial investment in a country outside the EU to reduce emissions has been made to get theses CDM certificates. Therefore, CDM certificates are a contribution to reach the European climate aim as cost effective as possible. Climate protection is a world-wide problem and therefore it is not important where the emission reduction takes place. In addition CDM is a contribution for the world-wide climate protection, even we do not have an international climate agreement yet. CDM certificates are based on real financial investments and it is a form of technology transfer. Therefore it is not conform with ETS to integrate the CDM certificates in the certificate balance. These measures have to be acknowledged as additional climate protection efforts and do not have to be integrated in the certificate balance.

Contact: Tina Buchholz

DE: Initiative INRO: sustainable providing of raw materials for biomass as input

The founding meeting for this initiative – started by the Federal Ministry for Food, Agriculture and Consumer Protection (BMELV) – took place on 4 June in Berlin. Clemens Neumann (head of directorate-general for bio-based economy, sustainable agriculture and forestry, BMELV) welcomed the participants. Next, Dr Hans Jürgen Froese explained what the sustainable providing of biomass for material use should look like from the ministry's viewpoint.

Sustainability criteria are to be developed for the cultivation – but not for the processing – of raw material plants. Initially, this is about large substance streams, with criteria to be transferable to other plants too:

- Oil-producing plants (e.g. rapeseed, oil palms, soybean, castor-oil plant)
- Starch/sugar-producing plants (e.g. sugar cane, sugar beet, maize, cereals)
- Fibre-producing plants (e.g. hemp, flax, linen, cotton)

All attendants (companies, associations, NGOs, governmental organizations) welcomed the initiative, as a matter of principle. They will become involved; only the environmental organization Deutsche Umwelthilfe still needs to check whether sufficient capacities are available. A central part of INRO is that companies define sustainability criteria for their products on a voluntary basis. The goal is to have a uniform sustainability regime for all substance streams globally, using existing systems from biofuels and food and feed.

The 3rd INRO conference will be held on 27 September in Berlin.

Contact: Sabine Lindner

DE: 2nd Advisory board meeting on the global market study “Bio-based Polymers and Plastics in the World”

The 2nd advisory board meeting on the above market study took place on 11 June in Cologne. First results were presented on that occasion. Michael Carus (managing director of the nova-institute) gave an overview of capacities, companies and uses of the polymers PLA, PHA/PHBs. So far, some 20,000 studies, articles and press releases have been evaluated and 100 expert interviews have been held. Around 50 questionnaires were sent to companies, with follow-up by telephone. Now, 195 manufacturers of bio-polymers and intermediates have been put on the database (77 of them with detailed data).

Wolfgang Baltus (National Innovation Agency, Thailand) described the current market situation in the Asia/Pacific region. Further relevant information was provided by Jan Ravenstijn, focusing on PBS and EP(D)M.

The next evaluation results for other polymer types will become available in September.

Contact: Sabine Lindner

3. Waste Framework Directive Transposition

PL: Implementation of WFD

Waste Act, implementing Waste Frame Directive has entered final stage of discussion in the parliament. Plenary voting is expected in Qu4 and if the act is accepted, Poland should avoid penalties from European Commission.

All sixteen regional authorities have prepared plans of waste management defining major installations for waste treatment. Municipalities will have to adapt till end of 2012 their regulations on the new waste tax and the method of its calculation. City of Warsaw has already adopted a bill allowing to include in the waste management also non-residential waste (offices, shops, etc.) that constitutes ca. 40% of all municipal waste. This will facilitate the waste management in the metropolis by preventing illegal transfer of waste to residential areas.

Contact: Kazimierz Borkowski

4. Plastics Waste Management

DE/ES: International conference on plastics recycling

The annual International Conference on Recycling of Plastics of bvse, Bundesverband Sekundärrohstoffe und Entsorgung e. V., took place in June in Bad Neuenahr/Germany. More than 400 participants from 12 nations attended the workshops, the plenary and the podium sessions. Spain was special partner this year. A practical knowledge transfer was realised by PlasticsEurope Espana and PlasticsEurope Deutschland with the target to initiate cooperation between Spanish and German plastics waste operators in practice. The overview situation of plastics recycling in Spain was presented by Cicloplast at the plenary. Details were discussed in the workshop about the separate collection of plastics waste from households by Ecoembes, recycling in the agricultural sector by Cicloagro, product applications of recyclates in the traffic sector by Zicla and, finally, research and innovation by Aimplast. In the plenary, recent statistics about plastics waste management in Europe was presented by Consultic and a vivid discussion took place on the podium about plastics recycling under European regulations with high level representatives of the EU Commission, the Joint Research Centre, Federal Ministries of Germany, EuPR and bvse board members.

Contact: Ingo Sartorius / Alicia Martin



PL: National Plan of Low-Emission Economy

PlasticsEurope Polska as the only industry partner has been asked Ministry of Economy to define and develop four areas of importance for plastics waste within the new National Plan of Low-Emission Economy. We have delivered positions on the role of plastics waste recovery within following areas: Solid recovered Fuels, Fossil resources, Landfills and Recycling. This initiative is just starting and is a part of governmental approach to resource efficiency strategy in Poland. PlasticsEurope Polska will contribute actively in the next stages of this project.

Contact: *Kazimierz Borkowski*

5. Ecolabelling & Green Public Procurement

AT: PVC frenzy in Austrias Not So Wild West

The federal state of Vorarlberg has always taken an active role in ecological procurement. Together with the notorious Vienna based „Institute for Eco- and Bio-Construction“ (IBO) Vorarlberg Energy Institute has created the baubook data base of eco-friendly products. In their new regulations on eligibility for subsidies to renovation and construction of homes the Vorarlberg government has made it a prerequisite to avoid PVC in all pipes, foils and films, floorings and wall covers. This puts Vorarlberg in a line with the incredible Vienna regulations against PVC.

Only exception to this rule are windows – due to their repeated contacts and advocacy efforts. A massive strategic effort will be started in September lead by PlasticsEurope Austria and the Austrian Chamber of Commerce.

Contact: *Heinz Schratt*

6. Packaging

AT: Recycling versus Rotting

On 10 July REWE Group announced they will offer more environment friendly plastic shopping bags in all their Austrian distribution outlets (BILLA, MERKUR, PENNY) .

Beginning this fall they plan to have completed the switch towards bags from recycled materials (recycling content: 80 %). Thus saving some 700 tonnes of new plastics material and reducing the CO₂ burden by 50 %.

Note: The German word for egg (Ei) is pronounced exactly like the letter „y“ in Recycling. So the design makes some sense – at least to the Austrians...



Contact: Heinz Schratt

DE: New study „ecological advantageous“ packaging

The German Federal Ministry of Environment and the Federal Environmental Authority commissioned the institutes ifeu in Heidelberg, GVM in Wiesbaden and the consultant Integrahl in order to review and update the criterion for “ecological advantageous” packaging according to the Packaging Ordinance. An advisory board was established, where PlasticsEurope Deutschland is member together with further concerned stakeholders such as material and packaging producers, waste operators und NGOs. The duration of the project is planned until end of 2014.

Contact: Ingo Sartorius

7. Consumer Protection

CZ: BPA

We cooperate with the Czech authority and SYBA on support of unification attitude toward BPA. We are against different approach in different EU countries. The Czech chemical association cooperated with the Czech office for standards metrology and testing which sent European commission our standpoint to Belgium and Swedish notification on BPA 2012/141/B. The Association of Chemical Industry of The Czech Republic during letters from Mr. Novak inform all the relevant Czech authorities and request about their support. We support the opinion PlasticsEurope.

Contact: František Svoboda

DE: Meeting of the working group KTW-AG in Bad Elster, Saxony

The Federal Environment Agency (UBA) issues guidelines – in the form of various recommendations – for the hygienic assessment of organic materials in contact with drinking water); the KTW-AG advises the UBA in these activities. The meeting on 19/20 June in Bad Elster focused on the work on the enamel guideline and the guideline for hygienic assessment of organic materials in contact with drinking water (KTW-Leitlinie). In this matter, a sub-working group meeting was held already in early May (see “intern” of June 2012). The rising number of questions received regarding thermoplastic elastomers (TPEs) and other groups of materials shows that the KTW-Leitlinie needs to be worded more concretely. A possible removal of TPE-specific rules and their transfer into a separate guideline are being considered too. The TPE-transitional recommendation was presented; it was adopted in April and applies until 2016. Full details are available at:

<http://www.umweltbundesamt.de/wasser/themen/trinkwasser/verteilung.htm>

The UBA points to a draft (not yet interdepartmentally agreed) for an ordinance amending the drinking water ordinance. In the planned new version of §17 – with the requirements to installations for the production, treatment or distribution of drinking water – it says that the assessment basis, as elaborated by the UBA, is to become binding from 1 January 2015. This would mean that the present recommendatory character of the guidelines would change into an obligatory basis for assessment.

Contact: Sabine Lindner

DE: VCI's project group discusses EU Community strategy for endocrine disruptors

On 21 June the VCI's Project-Group (PG) “Endocrine Effects” dealt with the Community strategy for endocrine disruptors (ED). For coordinating further actions in this issue, the EU Commission has established an “ad-hoc group ED”, with the participation of delegates from the Member States and other stakeholders. Industry has four seats (Cefic/VCI, ECPA, ECETOC, Colipa) in the team. On the technical side, the topics are prepared by an expert team. This is run by the Joint Research Center (JRC) and will draft recommendations for the Commission by end 2012. Next, the Commission will have agreed criteria and an ED assessment concept by mid-2013. In the May meeting, the ad hoc group discussed a questionnaire on the progress of and the experiences with the ED Community Strategy, with the possibility of answering the questions in writing later on. The answers are evaluated by the

Commission and form the basis for future activities. In the VCI PG meeting, the answers were discussed, improved and supplemented and – after another coordination round – passed on by Cefic to the Commission.

Information was given about a conference of the EU Commission of 11/12 June where EU commissioners Potočník, Geoghegan-Quinn and Dalli gave introductions to blocks of topics, by way of video messages. According to Potočník, there is reason for concern which calls for a science-based response.

Presentations and keynote speeches can be accessed on the Commission website:

http://ec.europa.eu/environment/endocrine/index_en.htm

It was stated that the European Parliament is planning an initiative report on the ED issue, with a first draft to be available probably in autumn.

The English-language version of the VCI position paper is on the internet at:

https://extranet.vci.de/Downloads/PDF/Endocrine%20Disruptors_Position_Englisch.pdf

Contact: Sabine Lindner

DE: PVC Workshop

The workshop “PVC and Environment” on 27 June – organized by the Working group PVC and environment (AGPU) and PlasticsEurope Deutschland – was attended by over 60 participants. For many years, this has been the recognized forum for experts from the PVC sector. Once again, reputable speakers provided topical reports and discussed major issues connected with PVC. The new European sustainability initiative VinylPlus was addressed too. Also presented were energy and cost savings through the use of PVC products, the possibility of marker systems for plastic products, a database-reliant NMR screening method for plasticizers in PVC, and the development of an internal PVC database (“PVC-WIKI”), PVC in medicine and as a basis for wood plastic composites.

Contact: Sabine Lindner



DE: TPE Workshop

Two associations – one topic: The joint event of PlasticsEurope Deutschland and Wirtschaftsverband der deutschen Kautschukindustrie (wdk, organisation of the German manufacturers of tyres and technical elastomers products) was held on 28 June in Frankfurt. The agenda included consumer articles from TPE, TPE in drinking water contact, and the impacts of the European chemicals legislation REACH on TPEs and their uses. These points were examined by competent experts from the Federal Institute for Risk Assessment (BfR), the Federal Environment Agency (UBA), and the Federal Institute for Occupational Safety and Health (BAuA). Some 50 delegates representing TPE manufacturers and processors as well as additive producers and specialists from test institutes and public agencies took part in the intensive discussions that followed the three expert lectures. These talks (in German language) can be downloaded from our homepage under “Veranstaltungen” (talk 1: Drinking water contact materials and thermoplastic elastomers; talk 2: REACH and TPEs; talk 3: Food commodities and TPEs):

[„Trinkwasserkontaktmaterialien und Thermoplastische Elastomere“](#)
[Dr. Frank-Ullrich Schlosser, Ramona Schuster / Umweltbundesamt](#)



„REACH und TPEs“

Andreas Fleischer / Bundesanstalt für Arbeitsschutz und Arbeitsmedizin

„Lebensmittel-Bedarfsgegenstände und TPEs“

Dr. Jochen Heidler / Bundesinstitut für Risikobewertung

Contact: Rüdiger Baunemann & Sabine Lindner

EU/DE: News about RoHS

The revised RoHS Directive, so called RoHS Recast, was published in the EU's Official Journal a year ago. Its provisions become effective by January 2013. Currently, the EU Commission is working on guidelines and an FAQ (frequently asked questions) paper, which just entered public internet consultation. The deadline for comments is 14 SEPT 2012, see http://ec.europa.eu/environment/waste/rohs_eee/events_rohs3_en.htm. For our industry and for chemical industry, the harmonisation with REACH especially regarding restrictions of substances is of key importance.

In addition, the Commission carries out an impact assessment and plans a methodology study in the context with REACH.

In Germany, PlasticsEurope is actively advocating with the Federal Government, who participates the EU TAC (Technical Adoption Committee), and with EE customer industries. Member company BASF supported to advocacy in meetings with industry, the Federal Government and DG Environment of the EU Commission.

Contact: Ingo Sartorius

8. Communications



DE: Plastics industry supports building and construction fair

Once again and for two days in summer, Stuttgart was the hotspot for sustainable building and construction. Supported by PlasticsEurope, the international fair “Consense” attracted architects, urban planners, engineers, and investors for the fifth time, with growing success. In year one, only 586 visitors came to the fair, while this year more than 2.400 people strolled through the fair halls of Stuttgart. For positioning plastics as an important sustainable material, PlasticsEurope focussed

its sponsorship on the exhibitor night. Michael Herrmann welcomed the participants with a short speech and opened the buffet. For this reason, attention was guaranteed. The association of plastics producers was also displayed on all big advertising spaces.

Contact: Michael Herrmann

DE: London calling – successful start for Team Kunststoff at the Olympic Games

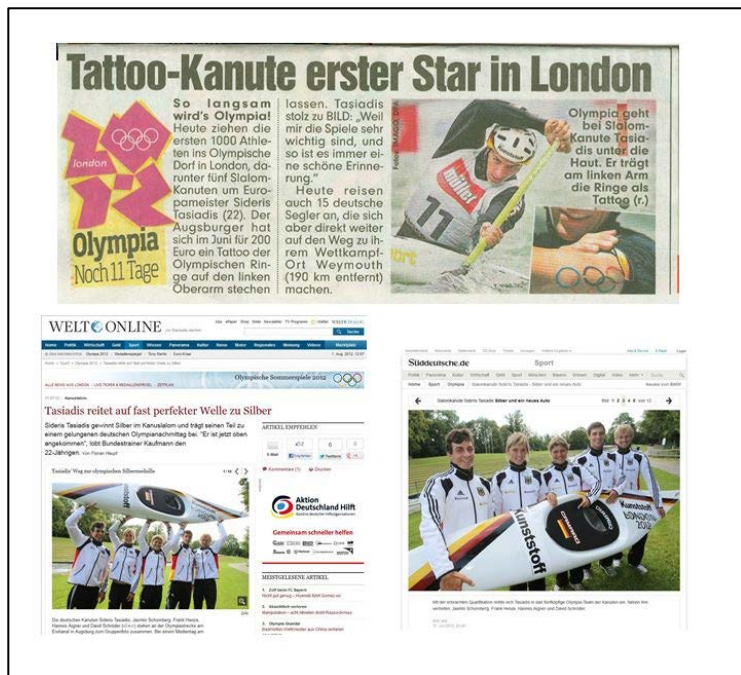
Moments to remember at the Olympic's Canoe slalom: A silver and a bronze medal are the results of Team Kunststoff after the first week at this year's Olympic Games. Sideris Tasiadis, European Champion in 2012, took silver in a heart-shaking final in Men's Canoe 1 slalom, being flanked by two double Olympic gold medallists. In the Men's Kayak 1 slalom final, Hannes Aigner, bronze medallist at this year's European championship, topped his result by winning another bronze medal at the Olympics. Following this wonderful success, lots of media attention focussed on our athletes. The biggest German daily newspapers BILD, Süddeutsche Zeitung and Welt used pics from the German canoe association, where you'll find the writing “Kunststoff” on every single boat, helmet and dress. This is of particular importance, because strictly no advertising and no sponsor names are allowed during the Olympics. Now, the last week of this year's Olympic Games has started, but there are still some interesting decisions ahead concerning our 24 athletes from Team Kunststoff. In canoeing, the German national teams of the sprint disciplines are involved, and during the following Paralympics, Wojtek Czyz is competing for a medal in athletic sports.

There will be a continuous reporting on the competition results on www.plasticseurope.org.

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Just a few weeks before the Olympics started, the media already gathered around the athletes from Team Kunststoff while they were heading for London. The major public TV stations from Germany as well as many sports journalists from newspapers and private TV channels were present at the events in Kienbaum, Potsdam (both located near Berlin) and Augsburg (Bavaria). This resulted in a good media coverage for the Team Kunststoff.

To ease the research and also to get in touch with PlasticsEurope, the Frankfurt office prepared a detailed folder with CVs, portraits and action photos of all the 24 Olympic participants of Team Kunststoff. It was sent out to every German newspaper and TV station that includes a sports section and to the most important news services.



Contact: Michael Herrmann

DE: Broad interest in education material

There is a persistent demand for the teaching material PlasticsEurope is offering. Apart from calls and letters from various schools throughout Germany, there are many more prospects ahead. Lately, the German packaging institute in Berlin ordered some education materials from PlasticsEurope for one of its seminars. It clearly shows: Not only schools, also economic institutes, governmental offices and other institutions are willing and interested in using the education materials.

And, once again, a grammar school from Baden-Wuerttemberg praised the collection of plastics sample in a message to PlasticsEurope: "... the enclosed samples are very useful for all our laboratory courses in the senior classes and irreplaceable when it comes to teaching about plastics." Many thanks!

Contact: Michael Herrmann

DE: Pupils joy about Kuno-shirts



A school from the small Bavarian town Bad Toelz is the winner of the Kuno competition in May 2012. Now, the pupils sent a picture that shows all of them wearing their prize, a Kuno shirt. The pupils also wrote: "... as you can see in the picture, we were really happy about winning the first prize. It was a lot of fun taking part in the competition. We are using Kunos coole Kunststoff-Kiste very joyful and fascinated in class ..."

Kunos coole Kunststoff-Kiste is the experimental set for primary school. It is meant for kids from 6 to 10 and aimed to interest them in plastics. On top, there is a fairy tale competition. Twice a year, a jury elects the best pictures the kids send in for the competition. They all get Kuno shirts for their class.

Contact: Tanja Rühl

**PL: "Recykling – Rejs" - let's recover plastics waste
Wisła 2012**

The initiative of PlasticsEurope Polska "Recykling Rejs – odzyskujemy tworzywa sztuczne" (*Recycling rally – let's recover plastics waste*) promotes proper waste management & antilitering behaviour (rivers free from waste). This year the action was organized on the biggest Polish river – Vistula. During the 900 km of the rally the respective information has been delivered to local administration and media at several meetings in stopover towns along the river.

This year we invited the members companies to join the action. In upper part of the river our canoeist Dominik Dobrowolski met the canoe team of Azoty Tarnów, who joined him for some 20 km on self-made canoe from plastics waste bottles. Basell Orlen Polyolefins representatives during the press meeting in Płock (where the company site is located), explained the industry procedures for preventing the pellet loss to environment.

The action was supported by media work (3 different press information with industry messages with broad distribution to media), 5 press meetings, specially designed logo and dedicated webpage (see www.recykling-rejs.pl), where the rally was reported on-line. The media response was very good, moreover the media partners - TVN Uwaga (national TV) – and radio Radio dla Ciebie (covering 30% of the country) daily reported on the rally.

Contact: Anna Kozera-Szałkowska



PL: Media work

A big article on plastics and its innovative applications written and signed by PlasticsEurope Polska has been published in the recent issue of "Niezbędnik Inteligenta" (in free translation "Manual for any Well-Educated Man") - bimonthly supplement to weekly prestigious magazine "Polityka". This holiday issue was dedicated to "Man/Earth/Universe" topics under the title "88 questions to science".

Contact: Anna Kozera-Szałkowska

SL: Conference »Trends in Bioplastics« in Ljubljana, 17-18 September 2012

The 2nd PLASTiCE International Conference "Trend in Bioplastics" will take place on September 17th-18th 2012 in Ljubljana, Slovenia. The program will focus on the question of bioplastics use and will offer answers to all those contemplating using these new materials to improve their environmental balance. The conference aims to reach industry from Central Europe and elsewhere.

The topics covered will include:

- an introduction to bioplastics
- the industrial framework and policy environment
- properties
- processing options
- certification
- environmental balances of bioplastics
- examples of industrial use
- future trends

A panel discussion will be organized in order participants will have chance to debate about the most hot topics in bioplastics. To cover these topics the organizers have secured the participation of a number of distinguished experts in the field from all around Europe.

In addition, a session will be devoted to the presentation of activities and outputs of the PLASTiCE project for the benefit of Central European plastic industry.

Organizers are project PLASTiCE partners: Slopak d.o.o., National Institute of Chemistry, and The Centre of Excellence PoliMaT, along with Slovenian Plasttechnics Cluster.

Attending the conference will be free of charge.

Details are available on the project's web site: www.plastice.org

Contact: Janez Navodnik

SK: Knowledge Competition HYPERICUM 2012 in Token of Energy

On 7 June in the Centre of Environmental Education DROPIE, the 16th year of the knowledge competition HYPERICUM took place. HYPERICUM 2012 was organized in the framework of the Ekopolis Foundation. Organizers of the competition: the Slovak Environmental Agency (branch of the Ministry of Environment of the Slovak Republic), The County Office of Environment in the town of Komárno (south-west Slovakia), the Slovak Water Supplies Company, the Administration of Inland Waters in Komárno, and the Administration of

Protected Country Area of the Danube Meadow Grove.

There were 23 competing teams consisting of pupils from 10 to 15 of the schools from all over western Slovakia.

Energy was the main theme of the competition.

The teams had to answer the questions on solar energy, how to save energy, and others.

The teams were very good prepared. Four teams on the 3rd place got the same number of points.

There had to be some series of additional questions.

Source: the web site of the Slovak Environmental Agency, 14 June 2012



Contact: Silvia Surová

SK: Meeting with Members of the European Parliament

On 20 June the meeting of the representatives of the national chemical associations VCI, ZCHFP SR and SCHP ČR with the MEPs for Germany, Slovakia and the Czech Republic took place in Hotel Stanhope, Rue de Commerce in Brussels.

The discussion was focused mainly on competitiveness issues and sustainable development of the Chemical Industry in the three countries concerned, coupled with the forecast of the industry in light of the Commission's legislative activities: Agenda 2020, Low Carbon Economy, Resource Efficiency, 7th Environmental Action Programme, Effects of REACH and ETS on the Chemical Industry, and others.

Programme of the event:

7.30 pm Welcome by Ladislav Novak/SCHP ČR, Silvia Surova/ZCHFP SR and Utz Tillmann/VCI.

7.50 pm Opening speech by Petr Cingr, President of the Czech Chemical Association

8.05 pm Comment by Oldřich Vlasák, Vice President of the European Parliament

8.30 pm Dinner and Discussion.

Contact: Silvia Surová

SK: President ZCHFP SR took part in the International Chemical Network Summit in Frankfurt

Mr. Roman Karlubík, President of ZCHFP SR took part in the first International Chemical Network Summit (ICNS) organized by Chemie-Cluster Bayern on 20 June in Frankfurt, within the framework of ACHEMA, the world's leading congress and exhibition for chemical technology.

70 representatives of chemical regions from Europe, Asia and the United States have discussed joint management strategies and intensified cooperation in certain technology fields.

ICNS was attended by managers of chemical networks and clusters, directors of chemical parks, scientists and political representatives. The main result of the discussion: especially cooperation in the fields of „Green Chemistry“, the plastics sector and process industry could accelerate the development of ready-to-use innovations by a more efficient information transfer.

Mr. Karlubík came up with his presentation on ZCHFP SR, development of chemical industry in Slovakia and V4 countries (CZ, HU, PL, SK) as well as about the main challenges for chemical sector in Slovakia. *Source: Web site of Chemical-Cluster Bayern, ZCHFP SR*
Contact: Silvia Surová

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 then the Primary Plastics sector showed predominantly decreasing production tendencies, while the Plastics Products sector remained more stable. The Plastics Machinery sector continued its growth until the third quarter 2011, but since then shows a slight downward trend.

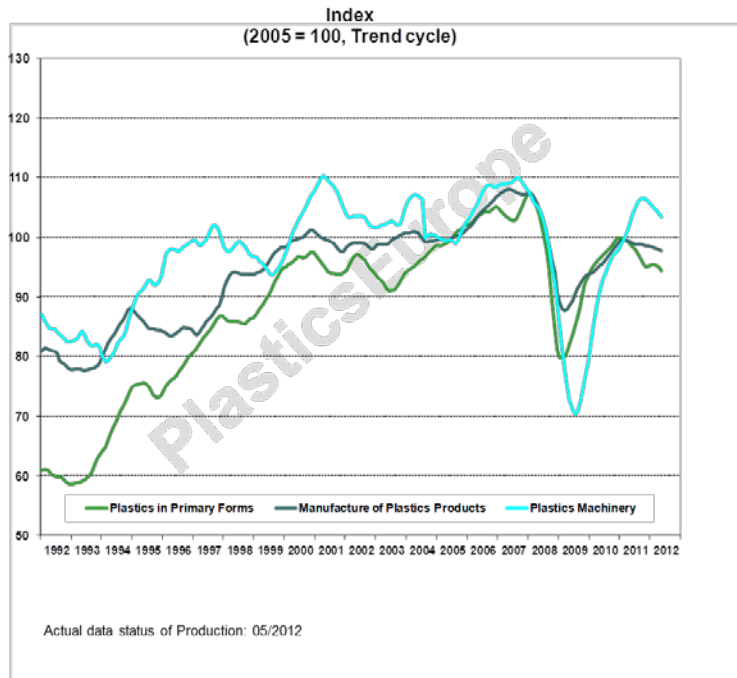
Sectors: Across sectors, developments at the beginning of 2012 were somewhat uneven. Production quantities of Primary Plastics showed a more or less stable development until March 2012, but with decreasing tendencies during April and May. The Plastics Products sector shows a very slight – but constantly declining production trend in 2012. Also Plastics Machinery shows a downward trend since the end of 2011, but shows still a growth of 4.9% on a year-to-year basis. Plastics Industry producer prices increase in all the three segments since the beginning of 2012. Especially prices for Primary Plastics showed a strong growth during the last months.

End use Industries: The Electrical Machinery Industry’s production shows a sideway movement since mid 2011. The upward trend in the Automotive sector came to an end in mid 2011 and seems to have shifted into a period of slightly decreasing production figures. Production figures for the construction industry decrease again since the fourth quarter of 2011 after almost two years of consolidation. Production in the more crisis-resistant Food and Beverages sector further on with a more or less sideway movement.

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 show a more or less constant development. Exports of Plastics Products also decreased in the first half of 2011 but showed increasing tendencies again since mid 2011. Total import quantities remain on a stable level for both Primary Plastics and Plastics Products.

Outlook: Production indices in all the three segments actually seem to tend to a negative trend, also the growth of the Plastics Industry price indices in May 2012 was clearly lower than in the months before. There are no strong signs for a change of the actual trend.

European Union (EU27) Plastics Industry Production



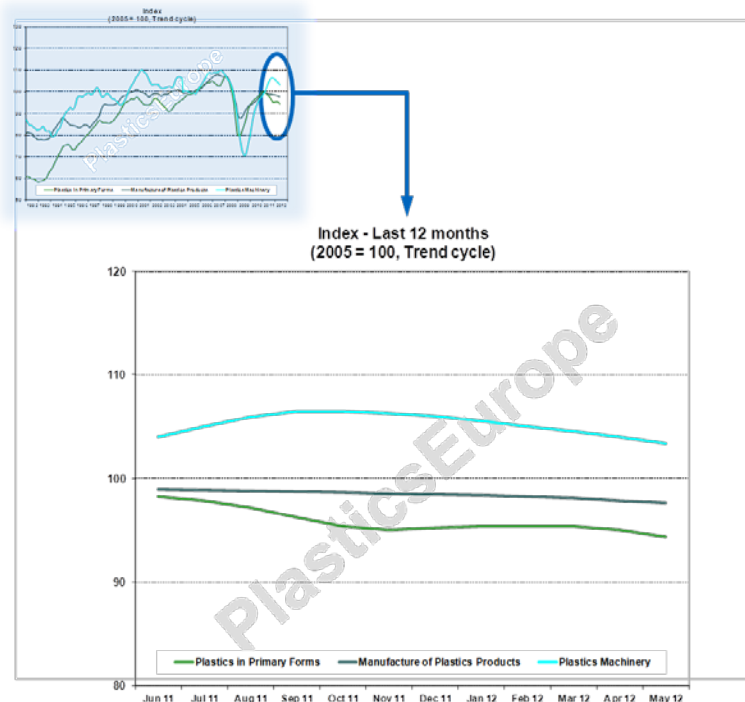
Plastics Industry Production by long term view (1992-2012):

- 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.

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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European Union (EU27) Plastics Industry Production



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

- After months of strong growth, Plastics Machinery with a slight downward trend since the end of 2011.
- The Plastics Products segment shows a very slightly – but constantly declining production trend during the last months.
- Plastics in Primary Forms shows a constant to slightly decreasing production trend in 2012.

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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European Union (EU27) Plastics Industry Production

Production Index (working day adjusted)

Sectors	May 12 Index 2005 = 100	Jan - May 12 Index 2005 = 100	May 12 y-o-y (%)	Jan - May 12 y-o-y (%)
Primary Plastics	99.3	98.3	-5.5	-3.8
Plastics Products	101.6	99.7	-2.1	-1.4
Plastics Machinery	99.7	100.6	-2.0	4.9

Production Index (Trend cycle)

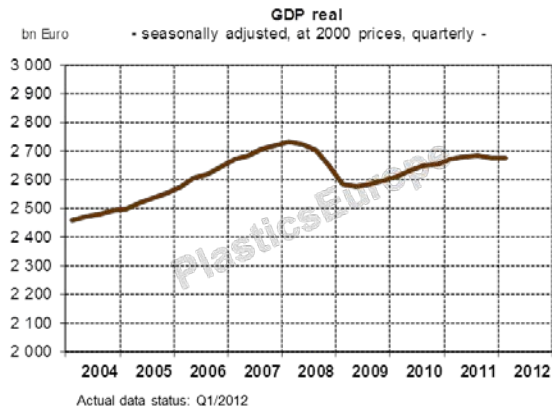
Sectors	Feb 12	Mar 12	Apr 12	May 12
Change in % against previous month				
Primary Plastics	0.0	0.0	-0.4	-0.7
Plastics Products	-0.2	-0.2	-0.2	-0.2
Plastics Machinery	-0.5	-0.5	-0.5	-0.5

- The first four months of 2012 show increasing production figures compared to the same period in 2011 for the Plastics Machinery sector, which grew by 4.9% on a year to year basis.
- Production of Primary Plastics (-3.8%) and Plastics Products (-1.4%) show a slight decrease compared to 2011.
- Production indices for Primary Plastics and Plastics Products showed primarily decreasing tendencies in the last months.
- Also the Plastics Machinery sector had to record a monthly decline of 0.5% against previous month during February and May 2012.

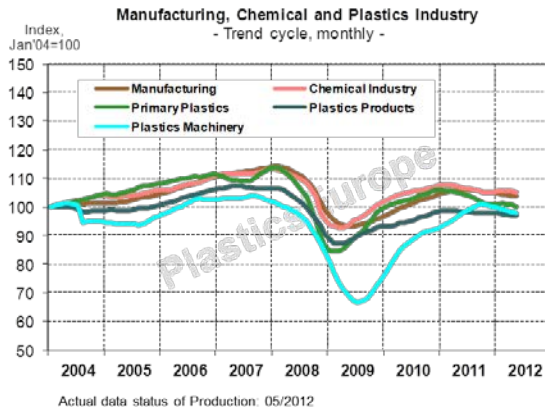
Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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European Union (EU27) GDP, Chemical and Plastics Industry

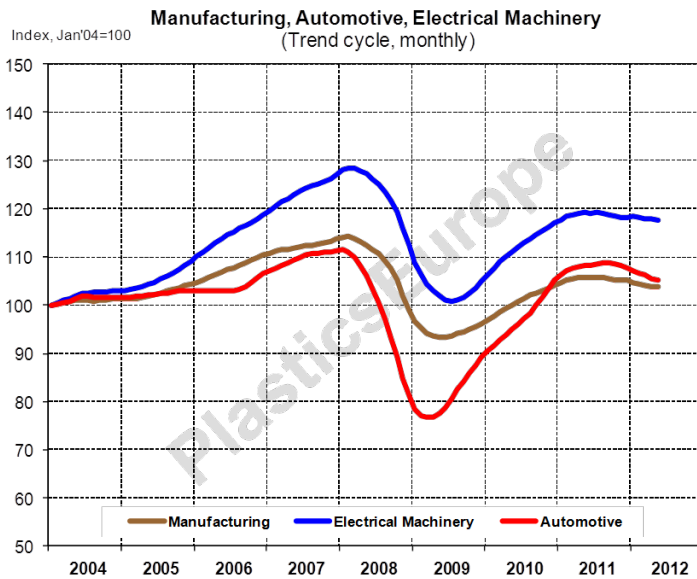


- EU27 GDP increased by 1.5% in 2011, compared to 2010.
- In the first quarter of 2012 the GDP decreased by 0.02% compared to fourth quarter of 2011.
- Actual estimations of Eurostat for EU27 GDP growth rates (year on year):
2012: +/-0%, 2013: +1.3%



- Uptrend in the Total Manufacturing industry has lasted until the first quarter of 2011. Since then, slightly decreasing tendencies were recorded. Chemical industry with sideways movement in 2012.
- More or less constant to slightly decreasing development for production of Primary Plastics, Plastics Products and Plastics Machinery in recent months.

European Union (EU27) Plastics Customer Industries - Part I

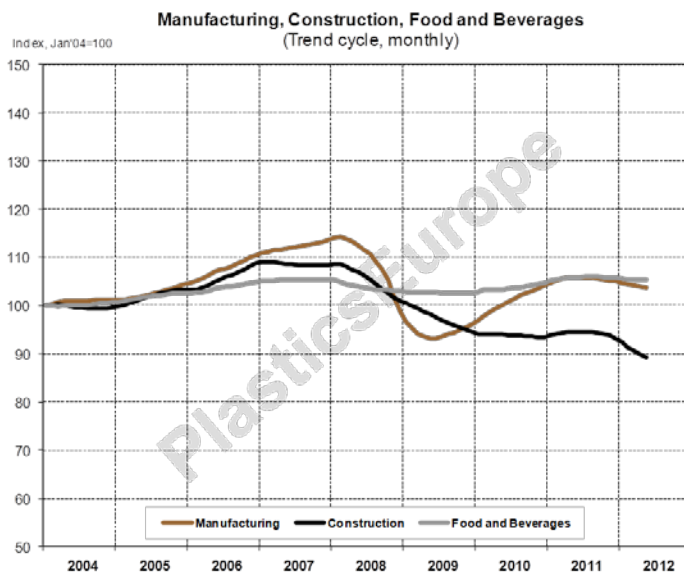


- Recovery in the EU27's Manufacturing Industry since 2009, but with slightly decreasing tendency since the second quarter of 2011 again.
- After strong growth especially in 2009 and 2010, Automotive industry with slightly decreasing tendencies since mid 2011.
- More or less sideways movement in the Electrical Machinery Industry since mid 2011.
- 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

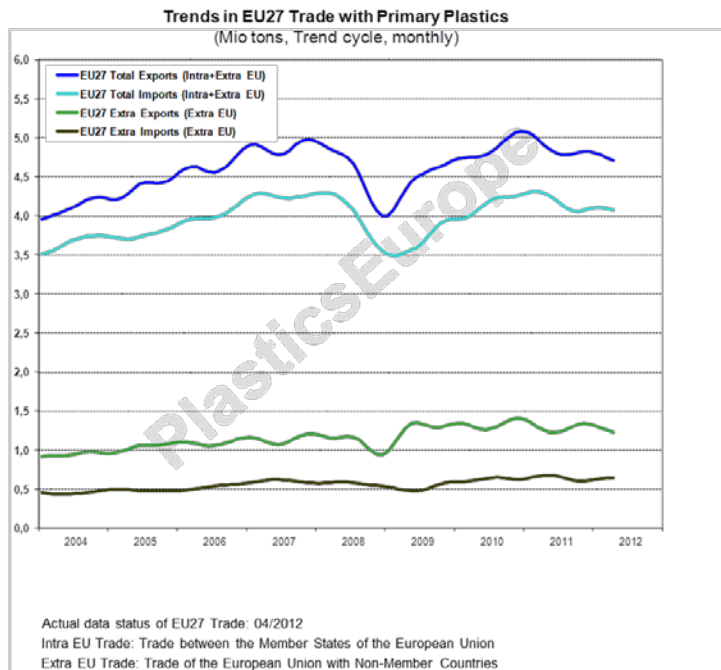


- Decreasing production trend in the Construction Industry since the third quarter of 2011.
- The Food and Beverages Industry was less hit by the recession than other industries.
- Slightly decreasing trend in production figures of the Manufacturing Industry since mid 2011.

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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European Union (EU27) Trade Primary Plastics



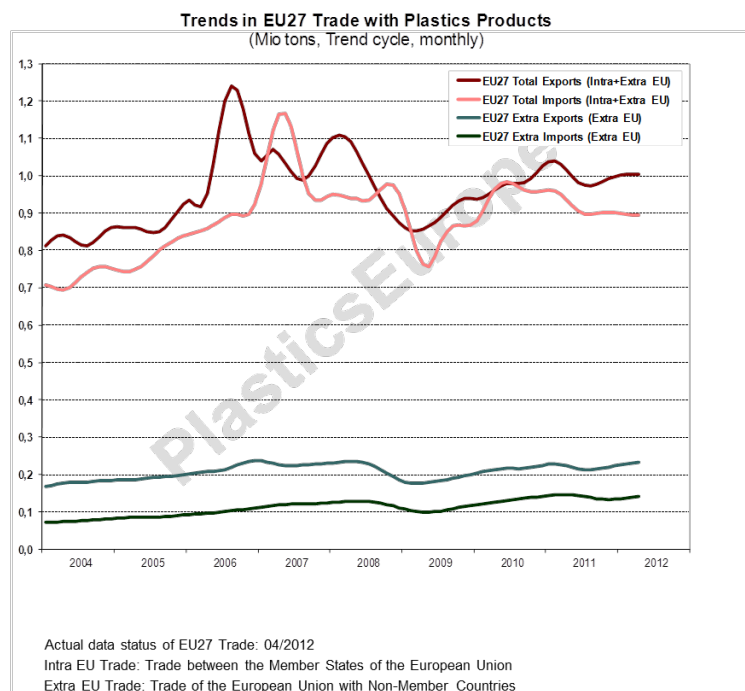
- Total EU27 Export quantity of Primary Plastics has reached its peak at the end of 2010. The same applies to EU27 Extra Exports.
- Import quantities from Extra EU27 as well as Total Imports show a more or less constant trend since the end of 2011.
- During the last years the Extra EU Import share grew to 15.3% in 2011. The Extra EU Export share from January to April 2012 (26.1%) was slightly lower than in 2011 (26.5%).

Extra EU Trade - Primary Plastics Share in Total (%)		
Year	Exports	Imports
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	15.3
2012YTD 04	26.1	15.8

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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European Union (EU27) Trade Plastics Products



- Since the fourth quarter 2011 Total Exports showed growing tendencies again. Total Imports remain on a stable level since 2011.
- Extra EU Exports grew slightly during 2009 and 2010. Since the end of 2011 a slight – but constantly growing trend can be observed again.
- The share of Extra EU Imports increased in recent years. In 2010 and 2011 the Extra EU Export share remained stable at a level of 22%.

Extra EU Trade - Plastics Products Share in Total (%)		
Year	Exports	Imports
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	22.0	15.3
2012YTD 04	21.6	15.6

Source: Eurostat / PlasticsEurope Market Research Group (PEMRG)

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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)*

SK: New Investment in Slovnaft Petrochemicals

The representatives of Slovnaft Petrochemicals s.r.o., Bratislava, which is the producer of primary plastics (polyethylene, polypropylene), and the consortium of companies Tecnimont (IT) and Tecnimont Planung und Industrieanlagenbau (DE), have signed the contract concerning the construction of new production unit for the production of polyethylene amounting €204 million. The new unit – LDPE 4 (Low Density Polyethylene) will be constructed according to the newest available techniques. The new production line will replace seven older ones. The production capacity will rise by 40 thousand tons to 220 thousand tons per year. The construction of the new unit will start in 2013, will be finished in 2015.

Source: *Hospodárske noviny daily, 29 June 2012*

Contact: *Silvia Surová*

10. The Association

CZ: Technology Platform

We prepared request for foundation of Czech technology platform for plastics. We prepared two main projects. Plastics for food packaging and recycle of plastics especially building's waste and packaging waste.

We discussed this projects with Czechinvest (meeting 14th June) and Institute of chemical technology Prague (meeting 15th June). The Institute of chemical technology prepare Technology centrum, investment cost around 280 000 000 CZK, start in 2014, place Kralupy nad Vltavou. Technology plastics platform end EPS association together with Institute of chemical will prepare workshop for MSE. Main topics "The possibilities of new Technology centre for recycle building's waste".

Contact: *František Svoboda*

11. Further topics

DE: New Governmental Commission of Lower Saxony

Based on the decision of Lower Saxony's Cabinet, the seventh Governmental Commission was established. Its working committees are:

- chemical policy
- permit law and IED
- waste management
- resource efficiency and electrical appliances
- eco design and market control
- acceptance and efficiency in the planning of intentions

Aim of the Commission is to consult the Government of Lower Saxony about economy and environmental issues. The work has effect on regional, Federal and European level.

PlasticsEurope Deutschland, VCI, tecpol and member companies participate in the relevant committees.

Contact: *Ingo Sartorius*

DE: Resource efficiency project with IGBCE and converters

PlasticsEurope Deutschland, GKV (German Converters Association) and the chemical union IGBCE presented first results about the joint project on resource efficiency in plastics industry value chain with special focus on employee involvement in the respective companies.

Interviews of both company management as well as works council and employees were performed in enterprises of raw material producers, suppliers and OEMs in diverse application sectors such as packaging, building, automotive etc. Key result is that management, information and dialogue contribute to improvement of resource efficiency.

Contact: Ingo Sartorius



PL: On Polish chemical industry

Polish chemicals and plastics producer, Azoty Tarnow (member of PlasticsEurope), has opposed to the call for selling majority of their stake done by Russian Acron. Instead, a consolidation of Tarnow with second biggest Polish chemical company, Pulawy, was agreed with Ministry of State's Treasure.

Contact: Kazimierz Borkowski