

PLASTICS

MAKING YOUR ENERGY WORK HARDER

APME
ASSOCIATION OF PLASTICS
MANUFACTURERS IN EUROPE

ANNUAL REPORT
2003





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PRESIDENT'S ADDRESS


INTRODUCTION BY DR. PRÄTORIUS



2003 was one of the most difficult and challenging years the European plastics industry has ever faced. Prospects of a speedy recovery after years of disappointing economic growth were dashed early in the year by the outbreak of war in Iraq, and ongoing tensions in the Middle East have continued to bring economic turmoil. Profit margins were hit head-on by the sluggish demand for plastics within the European market place and highly volatile crude oil and petrochemical feedstock prices also negatively impacted profitability along the entire plastics chain. Despite this, as we go into 2004, all signs indicate that the global economy is beginning to recover with demand for plastics looking encouragingly strong, driven in particular by the Asian and Chinese markets. While the underlying industry issues will continue, I am confident that with the industry's proven robustness we will take advantage of the gradual economic upturn and face the challenges of a competitive market place head-on.

Throughout this difficult year, APME continued to play a vital role in supporting and uniting the industry, driving awareness of plastics' unique potential to an audience of legislators and consumers. Thus, in 2003 the Association's work remained firmly focused on ensuring recognition of the fact that plastics make a major contribution to sustainable development and resource efficiency, with the energy debate becoming increasingly important. This activity was made possible with the continued support and active contributions from APME's membership and through the leadership of Nancy Russotto, APME Director General, and her entire team. Strong support from the National Plastics Associations (NPAs) remained crucial to the dissemination of the Association's work at a national level.

A plan for a new streamlined European plastics trade Association is projected to replace APME and the existing core National Plastics Associations in Europe by the end of 2004.



In early 2003, increasingly strong bonds with NPAs, the converters through EuPC and the European Chemical Industry Council (CEFIC), together with the dynamic and changing business environment, prompted member companies to initiate a review of APME and its interaction with partner organisations. The result is a plan for a new streamlined European plastics trade Association that is projected to replace APME and the existing core National Plastics Associations in Europe by the end of 2004. The new integrated pan-European Association is designed to respond to today's challenges with 'one industry voice' and will carefully balance national and EU considerations, and individual company and association issues, with the goal of optimising our efforts to act as a united industry, helping to ensure that plastics remain 'The Material of Choice for the 21st century.'

The 2003 work programme and that for 2004 set the scene for an exciting time for the Association and its members with all efforts focused on ensuring the smooth transition from APME into a new plastics Association. I am personally looking forward to overseeing the birth of a new organisation that will carry the plastics industry through the next decades with as much success and aplomb as its predecessor, APME.

Dr. Werner Prätorius
APME President

2003 OVERVIEW



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PLASTICS AND THE LEGISLATIVE DEBATE

During 2003, APME welcomed signs that, in a subtle shift from views held over the last decade, EU environmental policy is changing focus and is beginning to take a more holistic approach to waste management issues. Increasingly, the focus is on broader subjects which enable plastics to be featured as contributors to the goals of sustainable development.

This welcome shift in the debate has allowed APME to play a much more consultative role with legislators and, with the support of our Technical and Environmental Centre (TEC), is enabling the organisation to

participate positively in a growing number of subjects at European level. Rather than reacting to specific directives after they have been announced, APME is increasingly able to input into policy as it is being developed. A good example of this is the fact that in 2003, APME contributed to discussion papers on new Thematic Strategies being developed by the EU which will be used to shape emerging policies on not only waste management but also resource and energy questions.

This new focus in the environmental debate has been accompanied by a greater openness from all stakeholder groups and marks a more responsible and effective approach to resource efficiency and sustainability. This subtle evolution can only be beneficial to plastics, paving the way for new technologies and innovation which will drive plastics forward as a prime contributor to sustainable energy use.

EU environmental policy ... the focus is on broader subjects which enable plastics to be featured as contributors to the goals of sustainable development.



PLASTICS: VITAL FOR A SUSTAINABLE SOCIETY

2003 marked an eventful year for APME's communications programme, which continued to actively promote the benefits of plastics to a pan-European audience. As well as an ongoing media relations programme which supported APME's position as the voice of the plastics industry, APME set itself the challenge of developing a platform which would engage consumers and opinion formers across Europe

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APME formed a partnership with the international charity WaterAid, and launched the fundraising 'click-to-give' website, www.aquaplastics.org, in March 2003. In

response to every 'click' on the website, APME donated ten cents towards funding projects in Africa to provide safe, clean water. More than 650 000 people visited the site, and 1.5 million clicks were received in just three months. The site received special celebrity endorsement from the rock band *Coldplay* and generated extensive coverage in national, environmental and lifestyle press across Europe, further adding to the campaign's reach. As a result of the site's success, APME donated 150 000 euro for the provision of clean water supplies in Nigeria and Mali.

Not only did *Aquaplastics* allow the industry to contribute to one of the international community's goals – to provide clean water and sanitation to the one half of the world's population currently deprived of both – but it also ensured that a wide audience of consumers, legislators and influencers were aware of the vital role plastics play in water distribution and preservation. To increase the project's reach beyond the web, an extension to the existing plastics educational pack *Platform/Podium* was developed and distributed to more than fifty thousand teachers and their students in eleven European countries.

Due to the success of the *Aquaplastics* campaign a second charity initiative with WaterAid is planned in 2004.

2003 OVERVIEW



APME'S TECHNICAL PROGRAMME

Traditionally waste management issues have dominated TEC's activities. However, in recent years, European environmental policy has increasingly taken a longer term approach. Reflecting this change, TEC has shifted its strategic project focus to five activity clusters: licence to produce, license to market, waste management, demonstration of benefits, and EU strategies. These areas are now the focus of TEC's work and allow APME to be more responsive to the needs of the European debate.

This was evidenced in 2003, when TEC's research contributed to plastics being considered within a broader concept of resource savings and sustainability during the Thematic Strategies stakeholder discussions.

TEC studies played a role in persuading the Commission to consider the whole life cycle of products, not just the end-of-life phase, when looking at environmental impact and saving resources. Neil Mayne, Director of TEC, also acted as a technical expert to the ETAP (Environmental Technical Action Plan) run by the Commission and designed to address the issue of sustainable production and consumption. ETAP was adopted in January 2004 and will help to meet targets set out in the Thematic Strategies.

TEC studies played a role in persuading the Commission to consider the whole life cycle of products, not just the end-of-life phase.

The Packaging and Packaging Waste (P&PW) Directive targets were revised in 2003 and although plastics' recycling targets were increased, levels remain achievable and reasonably realistic for more member states thanks to input from APME's eco-efficiency studies.

As the ELV and WEEE Directives came into force, and the industry began to concentrate on implementation, TEC started to assess new technologies to improve end-of-life recovery. The limited



availability of homogeneous and clean waste streams for mechanical recycling means interest in gasification technologies for both feedstock recycling and energy recovery is increasing, with shredder residue treatment now becoming ever more important.

TEC once again published its annual survey on consumption and recovery compiled by AJI-Europe, but this time reducing the time-lag before reporting on the previous years statistics.

TEC's research will play an essential role in shaping future legislation.

TEC's research across the whole life cycle of plastics from 'cradle to grave', aimed at demonstrating the eco-efficiency of plastics will play an essential role in shaping future legislation, in particular as the revision of ELV recycling targets begin in 2005.



PLASTICS

MAKING YOUR ENERGY WORK HARDER



Plastics are something of an unsung hero, so often taken for granted, yet essential to the pursuit of a sustainable society. As pressure increases to find solutions to the problems of climate change, the European plastics industry continues to explore resource strategies for the whole life cycle of plastics products, demonstrating the unique potential of plastics to meet the challenges of a modern, sustainable society.

Plastics are probably one of the most resource efficient and flexible materials available to society. As such, they make a significant contribution to the vital goals of sustainable development, not only as a result of the useful products they help make and which bring economic and social benefits, but also because of the significant contribution they make to environmental protection.

Plastics are probably one of the most resource efficient and flexible materials available to society. As such, they make a significant contribution to the vital goals of sustainable development.

A key element of this is energy conservation. Plastics achieve this in a number of ways:

- increasingly energy efficient production processes
- energy saved throughout a product's lifetime
- end-of-life energy recovery contributing to the supply of alternative energies.

ENERGY SAVED THROUGHOUT A PRODUCT'S LIFETIME

Transport and the home are two of the biggest users of energy worldwide, and plastics play a vital role in reducing that energy consumption. For example, increasingly lighter, stronger plastics are helping automotive designers meet the twin challenges of increasing performance and minimising environmental impact. It is estimated that 100kg of plastics have typically replaced 200-300kg of

conventional materials in today's vehicles, saving around 12 million tonnes of oil and reducing CO₂ emissions by 30 million tonnes per year across Europe.

In northern European countries, almost one quarter of all energy consumed is used in domestic heating. Plastics foam insulation in housing typically saves the energy that is required to produce it within one year, and over the lifetime of the building the energy savings rise to 40-60 times that required. The CO₂ reduction over the lifetime is 10–40 times that generated in production.

END-OF-LIFE ENERGY RECOVERY

When plastics objects reach the end of their useful life, much of the energy contained within them can be recovered either in the form of materials or energy. Some 13 per cent of collectable plastics waste in Europe is mechanically recycled to produce 'recyclate' which can then be used alone, or mixed with virgin plastics, to make new plastics objects.

Where it is not environmentally or economically sensible to recycle, plastics can be recovered through combustion. In 2002, some 4.6 million tonnes of plastics waste across Europe were recovered in this way to provide power for industrial and domestic use.



Courtesy of Great Lakes Polymer Additives

PLASTICS

MAKING YOUR ENERGY WORK HARDER

CONTRIBUTING TO ALTERNATIVE ENERGY SUPPLIES

An integral component of plastics' environmental credentials is their contribution to the design of renewable or alternative energy technologies such as solar, wave and wind power.

Photovoltaic solar cells, which help convert the sun's energy into usable energy, rely on plastics' resistance to extremes of temperature and light to work efficiently. Advances in plastics technology mean that the cost of generating usable domestic electricity from solar radiation has been reduced. This, added to the fact that solar power is a clean source of energy, means that the wide scale adoption of solar energy in the future looks promising, reducing our dependence on fossil fuel energy. Furthermore, it is estimated that the equivalent energy used in the production of the plastics for fuel cells will be recovered by the active solar cell within two to three years.

In the future, hydrogen fuel cell technology may radically alter the way we power our vehicles. Plastics play a crucial role here as well. Several different polymer applications are involved in the construction of efficient, affordable automotive fuel cells. Hybrid systems which use a combination of power sources are already coming onto the market.

As can be seen, plastics already make a valuable contribution to energy preservation – during life, at end of life and through new technologies. Emerging technologies will mean that plastics will continue to be key to preserving the world's energy for future generations.

Emerging technologies will mean that plastics will continue to be key to preserving the world's energy for future generations.





Source: ATOFINA / Studio Amazonia



Source: Dow Europe

A CELEBRATION

OF PLASTICS AND THE INDUSTRY ASSOCIATION'S HISTORY



Source: www.smart.com

AS APME'S HISTORY EVOLVES INTO A NEW PHASE WITH THE BIRTH OF A NEW EUROPEAN PLASTICS INDUSTRY ORGANISATION, WE LOOK BACK AT THE ACHIEVEMENTS OF THE INDUSTRY AND CELEBRATE THE EVOLUTION OF PLASTICS AND THEIR PLACE IN SOCIETY.

1862: the plastics industry was founded with Alexander Parkes' discovery of 'Parkesine'. This was cellulose from wood flour or cotton fibre which, when dissolved in nitric and sulphuric acids and mixed with oils, formed a dough which dried to look like ivory or horn.



The plastics journey begins...

100 years later plastics is synonymous with the 'revolution' of the 60s and is one of the materials that makes man's first flight into space possible in 1961.

In the same year as plastics demand grows exponentially, a Federation of National Plastics Associations representing polymer manufacturers and converters is formed: The European Free Trade Agreement's Plastics Association (**EFTAPA**).



"I just want to say one word to you – just one word. Are you listening? Plastics... There's a great future in plastics". The groundbreaking film of the late 60s *The Graduate* sums up the era.

Plastics continue to innovate in the 70s, from records to clothes, furniture to electronics.



EFTAPA's role changes and in 1972, The Society of Plastics Association in Europe emerges and is the foundation for the Association of European Plastics Producers – becoming **APME** in 1975. Its focus is European representation with a mission to co-ordinate and support all efforts aiming to further the safe production and the safe and economical use and application of plastics, and hereby to contribute to common technological progress.



The end of the 80s showed a sustained period of growth for plastics well in excess of the general economic trend. But the environmental debate had turned waste management into a major political platform not only for environmentalists and consumer groups but for business who were tackling their environmental policies and thinking about the 'green' customer.

In 1990, the plastics industry structured itself to respond to the European Commission's concern to solve waste problems and established the Plastics Waste Management Institute (**PWMI**). Under the auspices of APME, the institute's focus was development of plastics waste management solutions, identification of priority sectors for reduction of plastics waste and study of waste collection and separation techniques to enhance recovery. Shortly thereafter, the PMWI became APME's Technical and Environmental Centre.



A CELEBRATION

OF PLASTICS AND THE INDUSTRY ASSOCIATION'S HISTORY

The 90s started with difficult business circumstances. A downturn in most European markets, combined with the impact of hostilities in the Gulf, left most producers with deteriorating business performance and increasing environmental pressure with the development of the EU Packaging and Packaging Waste Directive. But the 90s also represented strong investment and a drive to maintain plastics at the forefront of technological progress. The 90s saw the introduction of the artificial heart, increased use of solar and wind power to preserve natural resources, the minimisation and convergence of technologies that have changed our lives – all these technologies rely heavily on the innovative qualities of plastics.

Through APME, the industry demonstrated its determination to develop technical solutions to waste issues and to openly engage with key audiences to correct misperceptions about plastics. The 90s started the campaign of putting plastics in perspective.

The industry worked hard to demonstrate its focus on maximising resources and minimising waste, launching an environmental strategy of resource optimisation. The work was supported with life cycle analysis and groundbreaking eco-balance data that other materials sought to replicate in the years to come. New technologies for recycling were launched and the role for energy recovery within an integrated waste management strategy clearly demonstrated through scientific study.

The 90s saw the industry moving from correcting misperceptions to positively promoting plastics with the focus on *Plastics: Imagine the potential.*



Source: Cefic

In October 1997, the first *Identiplast* conference is held. APME's *Identiplast* conference has now become a widely recognised biennial industry event that brings best practice to push the boundaries of recycling development. Also in the 90s, *Platform/Podium* is launched. This pan-European education kit is still in existence, reaching over 50 000 teachers and their students across Europe.



A new century and APME, alongside the National Plastics Associations and member companies, drives home the message of plastics as **'The Material of Choice for the 21st century'** with sustainable development a cornerstone of plastics' role in today's society. Healthcare, sanitation, technology and education all increasingly rely on plastics to deliver cost-effective solutions to our modern society. Plastics' versatility, strength and flexibility, combined with the latest technology, have revolutionised the way we live and work, breaking down geographical, culture and social boundaries to bring the world closer together.



Looking forward to the birth of a new streamlined European plastics organisation that will bring the regions together into a single Europe-wide organisation. The new integrated network, working with customers, is designed to respond to future challenges with 'one industry voice' helping to ensure that plastics are recognised as 'The Material of Choice for the 21st century'.

STATISTICS

EUROPEAN STATISTICS



Source: ATOFINA / Studio Amazonia

APME collates European manufacturers' production and sales data for low density polyethylene (LDPE), linear low density polyethylene (LLDPE), high density polyethylene (HDPE), polypropylene (PP), polystyrene (PS), polyvinyl chloride (PVC) and polyethylene terephthalate (PET).

Figures quoted represent well over 95 per cent of the total production capacity in Europe for these plastics. **The figures cover EU25 + Norway + Switzerland unless indicated differently.** The graphs show the consolidated results for 2001, 2002 and the best industry estimates for 2003. The terms used are defined as follows:

LDPE

covers all grades of polyethylene having a density of 0.940 or less, excluding co-polymer grades marketed as linear low density polyethylene.

HDPE

covers all grades of polyethylene having densities in excess of 0.940.

LLDPE

is a third PE grade for which industry statistics collection started in 1988 as part of total sales by Western European Manufacturers into Western Europe.

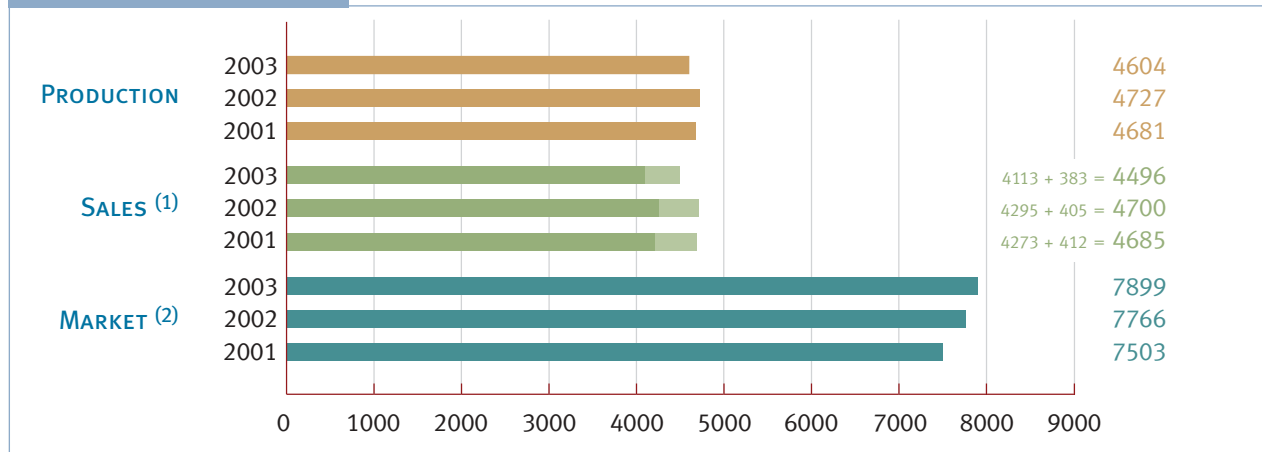
PS

does not include expandable or modified grades. Production and sales figures do not include the operations of non-participating companies which represented about 150 KT in Europe in 2003.

PVC

figures are relevant for the PVC producing companies established in the 25 countries of the enlarged EU except for Greece and Slovakia. These figures also include Norway, Switzerland and Romania. The production and sales figures do not include the operations of non-participating companies, which represented about 180 KT in EU25 in 2003.

LDPE

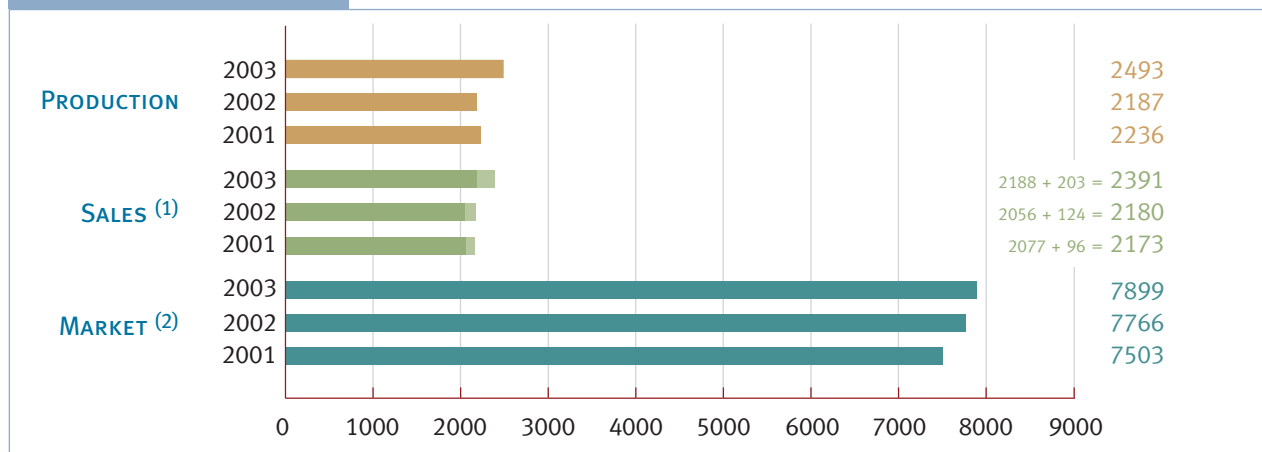


FIGURES IN 000 TONNES

(1) Sales into Europe cover EU15 + N + CH

(2) Includes LLDPE

LLDPE



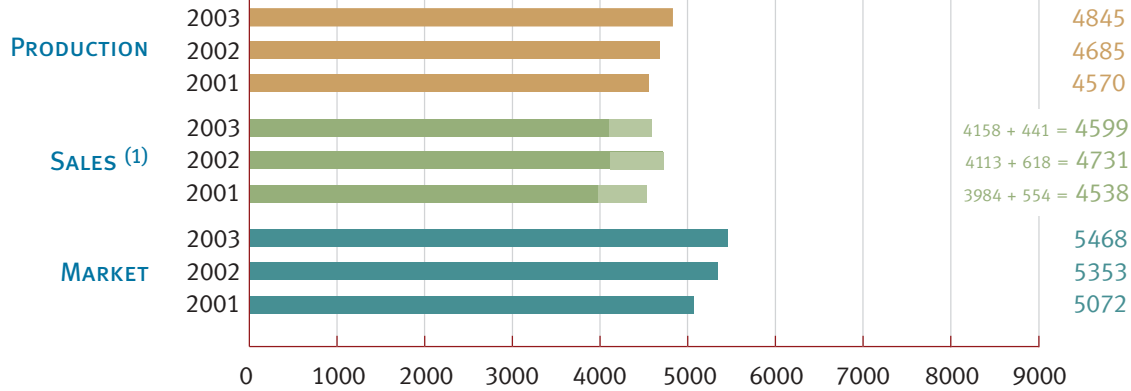
FIGURES IN 000 TONNES

(1) Sales into Europe cover EU15 + N + CH

(2) Includes LDPE

- Sales reported by European manufacturers into Europe (000 tonnes)
- Sales reported by European manufacturers outside the European market (000 tonnes)

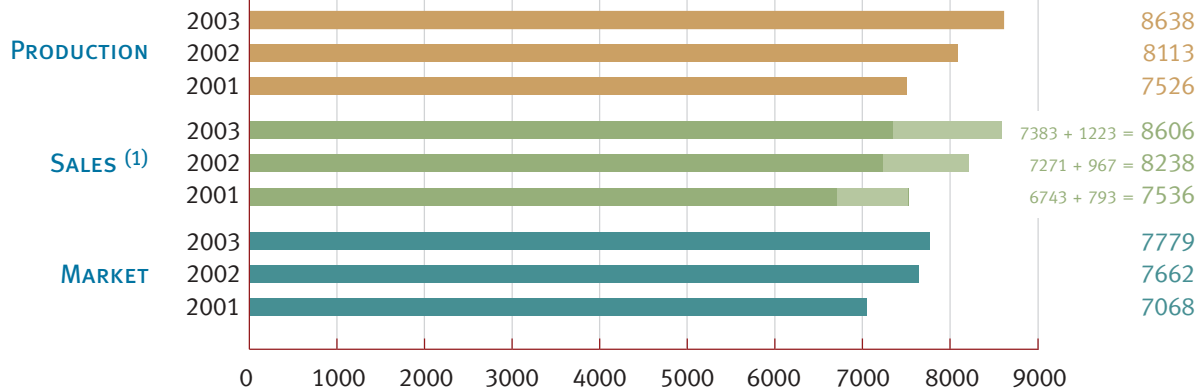
HDPE



(1) Sales into Europe cover EU15 + N + CH

FIGURES IN 000 TONNES

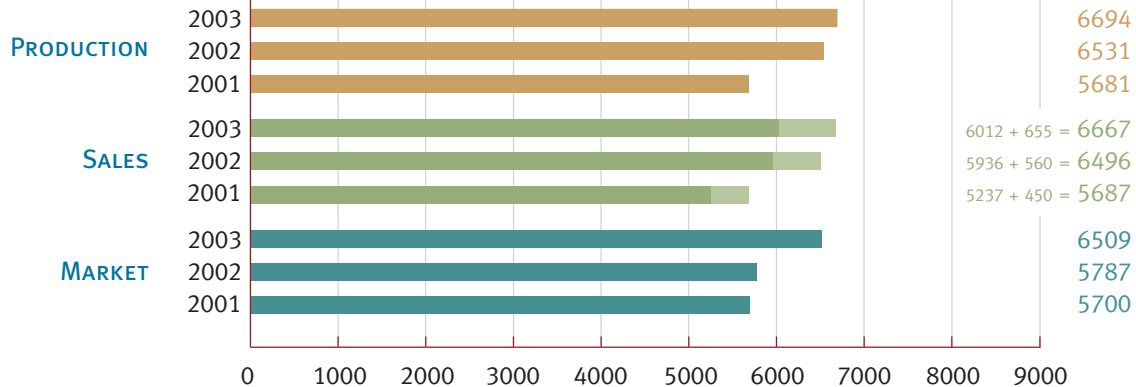
PP



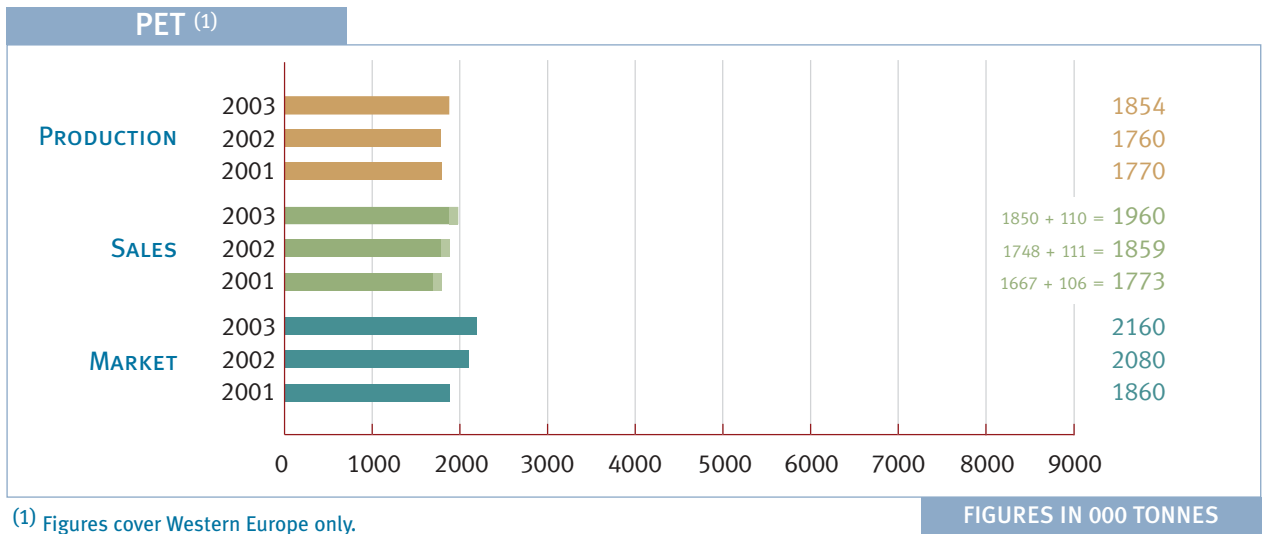
(1) Sales into Europe cover EU15 + N + CH

FIGURES IN 000 TONNES

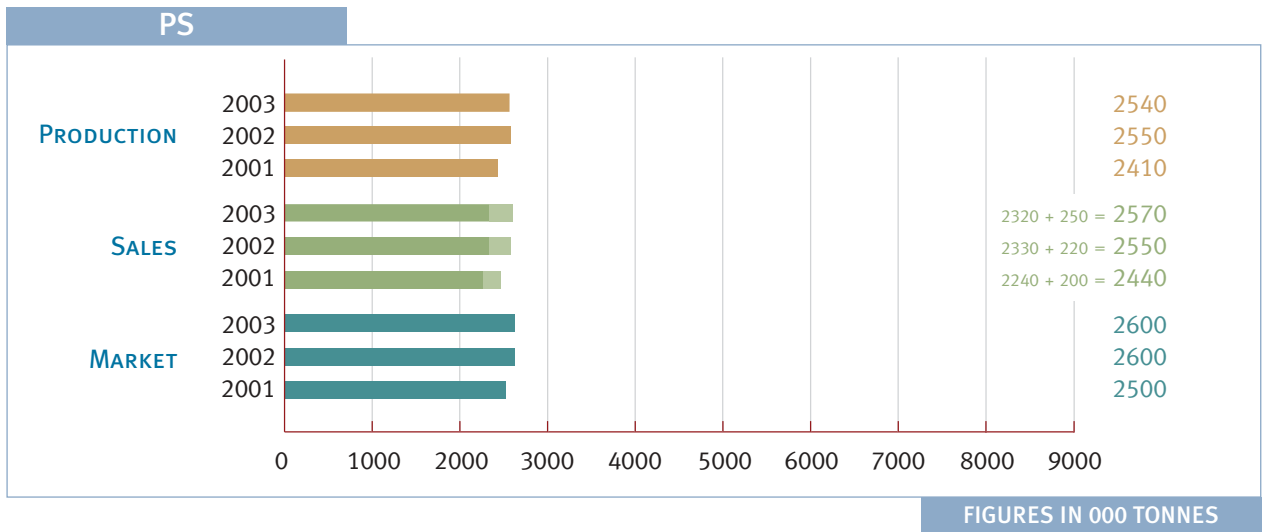
PVC



FIGURES IN 000 TONNES



(1) Figures cover Western Europe only.



- Sales reported by European manufacturers into Europe (000 tonnes)
- Sales reported by European manufacturers outside the European market (000 tonnes)

COMMITTEES

STEERING COMMITTEE

PRESIDENT

W. Prätorius President Petrochemicals Division, BASF

VICE-PRESIDENT

R. Genin President Polyolefins Europe, Basell Polyolefins

MEMBERS

D. Baudrand Business Unit Leader - Polymers Europe, BP

Ch. Churet Commercial Director, DOW Europe

P.J.F. Miller Chief Executive Officer, Bakelite

F.H.M.A. Noteborn Chairman & Chief Executive Officer of the Managing Board, SABIC
EuroPetrochemicals

Ph. Pôlet General Manager, LVM

D.C. Rolph Executive Vice-President Polyolefins, Borealis

TREASURER

J.P. Pleska Managing Director - SBU Vinyls, Solvay



Photo by GE Advanced Materials

STEERING COMMITTEE WORKING GROUPS

COMMUNICATIONS & INDUSTRY ISSUES

CHAIRMAN

R. Genin

President Polyolefins Europe, Basell Polyolefins

VICE-CHAIRMAN

P.J.F. Miller ⁽¹⁾

Chief Executive Officer, Bakelite

MEMBERS

J. Dahmer

Managing Director Business Group Plastics, Bayer

F.H.M.A. Noteborn

Chairman & Chief Executive Officer of the Managing Board, SABIC EuroPetrochemicals

Ph. Pôlet

General Manager, LVM

M. Pugh

Vice President, Managing Director for Europe, NOVA Chemicals

D.C. Rolph

Executive Vice-President Polyolefins, Borealis

J. San Pedro

Managing Director Europe, Middle East and Africa, Voridian

TECHNICAL, ENVIRONMENT AND HEALTH "TEC-H"

CHAIRMAN

Ch. Churet

Commercial Director, DOW Europe

VICE-CHAIRMAN

R. Bornhofen ⁽¹⁾

Chief Executive Officer, Vestolit

MEMBERS

D. Baudrand

Business Unit Leader - Polymers Europe, BP

Q. de Borrekens

President Polypropylene, ATOFINA

I. Marco Arbolí ⁽¹⁾

Polyethylene Director Repsol Quimica, REPSOL YPF

D. McFall

Vice President Europe, Packaging & Industrial Polymers, DuPont de Nemours International

M. Paravidino

Director, Polyethylene Division, Polimeri Europa ⁽²⁾

D. Price

Polyethylene Commercial Manager for Europe, Middle East & Africa, ExxonMobil Chemical Europe

(1) as from May 2003 - (2) Président Administrateur Délégué, Polimeri Europa Benelux as from September 2003

APME STANDING COMMITTEES



Standing and Product Committees manage issues related to safety, health and environment, product stewardship, European regulation, fair treatment of plastics, and communications to others about the industry.

The Standing Committees focus on generic plastics issues such as fire safety and food contact as well as providing guidance to the Product Committees. All member companies are welcome to participate in Standing Committees.

FIRE SAFETY COMMITTEE

In 2003, this committee continued monitoring the Construction Products Directive related harmonisation process at EU level regarding fire hazard and classification of products. Of particular importance were thermal insulation products, cables, façades, national implementations of the EU classification system as well as the activities of CEN TC 127 (Fire safety in buildings) in relation to fire testing and to the revision of the harmonised SBI test.

An emerging issue in the field of standardisation was the environmental impact of fires. Several experts of the FSC were involved in the activities of ISO TC 61 (Plastics) and ISO TC 92 (Fire safety) covering this matter.

The FSC has been discussing with other partners about the development of new test methods for testing the burning behaviour of plastics products.

CHAIR: R. Dewitt, Solvay

DEPUTY CHAIR: C. Lukas, DOW Europe



FOOD CONTACT COMMITTEE

During 2003, the committee worked on the draft (working document) of the so-called “Super Directive” which is a consolidation of existing food contact directives for plastics materials and articles in contact with food (including vinyl chloride, migration testing, food simulants) and the existing “Plastics Food Contact Directive”(2002/72/EC) but which also introduces a number of new elements including functional barrier, fat type reduction factors and new rules for compliance at each stage of the manufacturing process. The APME Food Contact Committee worked closely together with the plastics value chain in order to address issues of concern with the Commission. The committee continued to work on the 2nd amendment of Directive 2002/72/EC and the positive listing of monomers and additives.

Committee working groups also worked on the draft legislation on recycled plastics for food contact materials and on traceability in collaboration with the relevant value chains and with CEFIC-FCA on polymeric production aids.

The committee liaises with CEFIC, CEPE, EuPC, FPE and CIAA on issues of concern.



Source: ATOFINA / PUB CONSULT

CHAIR: C. Guéris, DuPont de Nemours International

DEPUTY CHAIR: B. Brands, DOW Europe

APME PRODUCT COMMITTEES



Product Committees dedicate their efforts to product-related topics, including trade issues. These committees aid and inform the association but also actively liaise with international associations such as the European Chemicals Industry Council (CEFIC), the European Plastics Converters (EuPC), representative organisations of supplier and customer industries, interest groups, and the wider international plastics community.

PET COMMITTEE

CHAIR:

A. Ciotti, DOW Europe

MEMBER COMPANIES:

Brilén, DOW Europe, DuPontSA, Elana¹,
Italpet Preforme, KoSa, Voridian, V.P.I.,
Wellman

¹ New member as from July 2003

POLYSTYRENE COMMITTEE

CHAIR:

B. Nusbaumer, ATOFINA

MEMBER COMPANIES:

ATOFINA, BASF, BP, DOW Europe, Kaucuk,
Polimeri Europa, NOVA Chemicals

EPOXY RESINS COMMITTEE

CHAIR:

J.A. Merino, DOW Europe¹, P. Yianni,
Resolution Europe²

MEMBER COMPANIES:

Bakelite, DOW Europe, EMS-PRIMID,
Resolution Performance Products, SIR
Industriale, Solutia³, Vantico⁴

¹ until January 2003

² as from February 2003

³ Surface Specialties UCB as from January 2004

⁴ Huntsman Advanced Materials as from January 2004

POLYCARBONATE / BPA COMMITTEE

CHAIR:

B. Richter, Bayer

MEMBER COMPANIES:

Bayer, DOW Europe, General Electric Plastics



POLYOLEFINS COMMITTEE

CHAIR:

K. Abbås, Borealis

MEMBER COMPANIES:

ATOFINA, Basell Polyolefins, Borealis, BP, Chemopetrol, DOW Europe, ExxonMobil Chemical Europe, Polimeri Europa, REPSOL YPF, SABIC EuroPetrochemicals

EXPANDABLE POLYSTYRENE COMMITTEE

CHAIR:

P. Ayrey, NOVA Chemicals

DEPUTY CHAIR:

G. Suess, BASF

MEMBER COMPANIES:

BASF, BP, DOW Europe, Gabriel Technologie, Kaucuk, Monotez, Polimeri Europa, NOVA Chemicals, REPSOL YPF (Polidux), Styrochem Finland, Sunpor Kunststoff

FLUOROPOLYMERS COMMITTEE

CHAIR:

J.V. Sullivan, Dyneon¹, L.Hoy, Asahi Glass Fluoropolymers UK²

MEMBER COMPANIES:

Asahi Glass Fluoropolymers, ATOFINA, DuPont de Nemours International, Dyneon, Solvay Solexis

¹ until January 2003

² as from February 2003

ABS / SAN COMMITTEE

CHAIR:

M. Tincani, Polimeri Europa

DEPUTY CHAIR:

M. de Braaf, DOW Europe

MEMBER COMPANIES:

BASF, Bayer, DOW Europe, General Electric Plastics, Polimeri Europa, REPSOL YPF (Polidux)

UP RESINS

CHAIR:

D. de Vreeze, DSM

MEMBER COMPANIES:

Ashland, Cray Valley, DSM, Lonza, Reichhold, Scott Bader Company, SIR Industriale, UCB

APME PRODUCT COMMITTEES



Source: ECVM

VINYLS COMMITTEE / ECVM

CHAIR:

David Thompson, EVC International

MEMBER COMPANIES:

Aragonesas (Aiscondel), ATOFINA, Cires, EVC International, Hydro Polymers, LVM, Novacke Chemicke Zavody, Shin-Etsu PVC, Solvin, Spolana, Vestolit, Vinnolit

The Vinyls Committee is the Board of the European Council of Vinyl Manufacturers, which represents the European PVC producing companies. Its membership includes 12 European PVC producers, of which 10 are the leading producers in the EU15 which together account for 98% of the European Union PVC resin production.

During 2003 ECVM experienced a period of growth which resulted in the creation of three new staff positions within the organisation. The positions are: Manager Building & Construction, Manager Eco-labelling and Public Procurement, and Communications Assistant – NGO and Stakeholder Contacts. The new staff joined ECVM in June. ECVM has also appointed a new Electronic Communications Manager.

Implementation of Vinyl 2010 – the Voluntary Commitment of the PVC industry continues and ECVM plays a central role. Vinyl 2010 is delighted to announce the achievement of the Commitment's target to recycle 25% of collectable, available PVC waste from window profiles, roofing membranes, pipes and fittings in 2003. It represents a true success for Vinyl 2010 and it demonstrates that the PVC industry is fully on track to achieve the 50% objective in 2005.

Other important positive results come from the field of mechanical and feedstock recycling, where the Vinyloop® and RGS90/Stigsnaes technologies confirmed a promising potential to increase volumes of recycling.

Vinyl 2010 continuing work with the Trade Union organisation EMCEF aims to take advantage of the Voluntary Commitment approach as an efficient way of transferring best practice to the acceding EU Member States, avoiding complex legislative processes.

Preparation for the challenge of integrating the EU accession countries into building a sustainable future for European industry is also ongoing. Several meetings were held in these states, including one involving Trade Unions, to help raise health, safety and environmental standards to higher levels.

Another landmark in 2003 was the establishment of a Monitoring Committee with participation from senior Commission officials and representatives of the European Parliament. The importance of “keeping under continual review the progress towards achieving the Voluntary Commitment” was emphasised by European Commissioner Margot Wallström and Vinyl 2010 is pleased that the Monitoring Committee has for the first time reviewed the annual progress report.

Vinyl 2010 is still waiting for a Communication from the European Commission and everyone in the industry would welcome policy clarity to facilitate progress. With or without this, however, Vinyl 2010 will continue to put into practice the commitment of the industry chain toward sustainability.

Current feedstock recycling technologies being developed in Japan have been considered by ECVI technical experts in order to decide which if any of these technologies could be transferred to Europe in the future, if necessary.

Following the very successful Global Vinyl Council (GVC) meeting in Athens in October 2003, ECVI handed over the Chairmanship of the GVC to the Vinyls Institute (USA).

Work started during the year to clarify the methodological uncertainties remaining following the EDC/VCM and suspension PVC charter re-verification in 2002, and preparatory work also started on the first verification of the Emulsion PVC charter.



Source: ECVI

APPENDICES

MEMBERSHIP STATUS



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- A** Sunpor Kunststoff
- B** Basell Polyolefins
ExxonMobil Chemical Europe
Gabriel Technologie
LVM
PolyOne
Solvay
- CH** DOW Europe
DuPont de Nemours International
EMS-PRIMID
NOVA Chemicals
Vantico³
- CZ** Chemopetrol
Kaucuk
Spolana *
- D** Bakelite
BASF
Bayer
Dyneon
KoSa
Solutia¹
Vestolit
Vinnolit
- DK** Borealis
- E** Ashland
Aiscondel
Brilén
REPSOL YPF
- F** ATOFINA
- FIN** Styrochem Finland
- GR** Monotez
V.P.I.
- I** Italtel Preforme
Lonza
Polimeri Europa
SIR Industriale
- N** Norsk Hydro
Reichhold
- NL** Eastman Chemical (Voridian)
EVC International
General Electric Plastics
Resolution Performance Products
SABIC EuroPetrochemicals
Shell Chemicals Europe
Shin-Etsu PVC
Wellman
- P** Cires
- PL** Elana²
- SK** Novacke Chemicke Zavody *
- UK** Asahi Glass Fluoropolymers UK
BP
DuPontSA
Scott Bader Company

* Associate members

¹ Surface Specialties UCB as from January 2004

² New member as from July 2003

³ Huntsman Advanced Materials as from January 2004

New member as from 2004: DSM Engineering Plastics (NL)



Plastics

Reincarnation or Source of Energy

When plastics reach the end of their worldly existence, their use does not end there... Many plastic objects are 'reincarnated' into for example flower pots, fleece pullovers, carpets, sleeping bags or toys.

Others can help preserve scarce resources thanks to their unique energy potential. For example, a single plastic bag holds the energy potential to light an entire room with a 60W light bulb for up to 10 minutes!

For more information on plastics recycling or plastics as a source of energy, please visit www.apme.org



APPENDICES

APME SECRETARIAT



Source: Bayer MaterialScience AG

SECRETARIAT

APME DIRECTORS

Nancy Russotto	Director General
Neil Mayne	Head, Technical and Environment Centre
Axel Kistenmacher	Director, Technical and Environmental Centre
Jean Schoemans	Director, Technical and Environmental Centre ¹
Herbert Fisch	Director, Technical and Environmental Centre ²
Yvonne Barcelona	Director, Communications
Jean-Pierre De Grève	Director, ECVM

¹ from March 2003 - ² until February 2003

APME EXECUTIVES

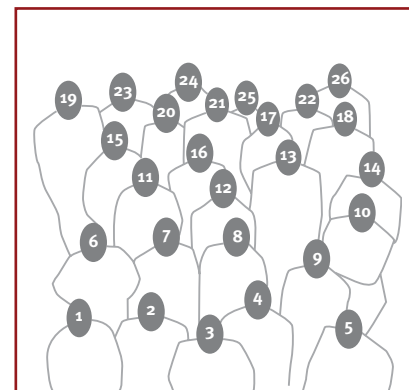
Carol Banner	Manager
Anne-Marie Hamelton	Manager
Russel Mills	Manager
Georges Ransbotyn	Manager
Martine François	Office Manager

PICTURE

1. Gaëtane Bellefroid (ECVM) - 2. Anne Meysmans - 3. Vanessa Hum - 4. Caroline Dubois - 5. Hanane Taidi - 6. Giulia Cipressi (ECVM) - 7. Yvonne Barcelona - 8. Nancy Russotto - 9. Martine François - 10. Gaetano Palermo (ECVM) - 11. Carol Banner - 12. Christine Beunen (ECVM) - 13. Jean Schoemans - 14. Claudine Coulon - 15. Amélie de Bien (ECVM) - 16. Suzy Crosiers - 17. Noelle Tracey (ECVM) - 18. Axel Kistenmacher - 19. Neil Mayne - 20. Sonja Celis - 21. Jean-Pierre De Grève (ECVM) - 22. Russel Mills - 23. Arjen Sevenster (ECVM) - 24. Dominique Zimmerman - 25. Line Jensen - 26. Martyn Griffiths (ECVM)

Missing:

Anne-Marie Hamelton, Georges Ransbotyn, Laurence Vermeersch, Tanguy Brasseur, Nadine Rubbens







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