

of nearly 8%/year since 2002, making Poland the second biggest EPS market in Europe, after Germany. In addition to strong growth in the construction sector, the market has also benefited from investments in appliance manufacturing.

Having enjoyed substantial growth between 2005 and 2006, the market for general purpose high impact grades of PS was relatively flat through 2007 at around 128,000 tonnes. The market suffered because of steep increases in the price of resin reflected in imports being down 13% compared with the previous year. The market has been driven by growth in dairy and fast food packaging and the development of domestic appliance and telecronic production. However, while PS demand in this sector has progressed, small scale producers in Poland are wary of foreign investors moving production to the Far East.

PET demand has been growing very strongly in Poland due to the rapid uptake in the use of PET bottles replacing glass, tinsplate and other polymer bottles. Between 2002 and 2007 PET demand grew on average at almost 11%/year resulting in nearly 220,000 tonnes being consumed in 2007. With much of the conversions from glass and other plastics having been achieved future growth will depend more on increasing sales of carbonated soft drinks, mineral water, beer and exports of preforms.

Engineering polymers is another sector which has been seeing significant increases in demand, although this has only been achieved relatively recently, and from a small base. Materials such as polycarbonate and PBT have been introduced into the Polish market, largely driven by the demands of foreign investors. In the next five years, a wide variety of industries, led by the automotive, electrical, telecommunications and domestic appliances industries, will keep the demand level up for all engineering polymers.

The ABS market is growing strongly, driven by increased levels of foreign investment in electrical goods manufacturing. Poland is rapidly becoming a centre for flat screen TV production with LG Electronics, Phillips, Toshiba, Sharp, Humax, Funai and TVP Technology all investing in flat screen production in Poland. Polyamide is the other volume engineering resin used by Polish processors primarily for automotive, electrical and film extrusion.

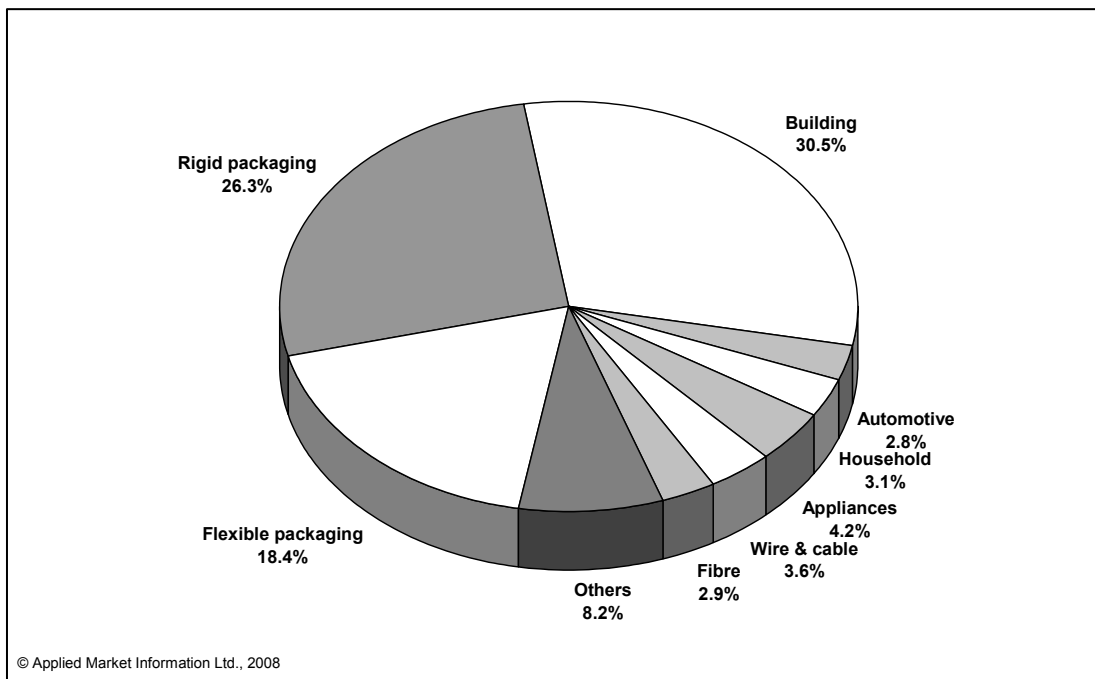


Figure 2: END USE APPLICATIONS FOR THERMOPLASTICS IN POLAND 2008

ADWA Sp. z o.o. PPHUT

ul. Lodowa 107
93-232 Łódź
Tel: 042 649 1568
Fax: 042 649 2493
E-mail: adwa@adwa.com.pl
Website: www.adwa.com.pl
Contact: Mr. A. Gostyński, Chairman

Parent company: Privately Owned
Year founded: 1993
ISO registration: ISO 9001

Processes operated: Blow moulding

AGAPLAST Sp. z o.o.**PPH**

ul. Mrongowiusza 29
11-015 Olsztynek
Tel: 089 519 2631
Fax: 089 519 3835
E-mail: sekretariat@agaplast.pl
Website: www.agaplast.pl
Contact: Mr. B. Moros, Managing Director

Parent company: Privately Owned
ISO registration: ISO 9001v2000; 14001.

Processes operated: Compounding

AGASTYL S.J. PPH

ul. Krzemowa 12
19-300 Elk
Tel: 087 620 0695/621 6195
Fax: 087 621 6195
E-mail: agastyl@agastyl.pl
Website: www.agastyl.pl
Contact: Mr. T. Zrajkowski, Managing Director

Parent company: Privately Owned

Processes operated: Compounding

AGFOL PTSZ S.C.

ul. Kielecka 1A
26-050 Zagnańsk
Tel: 041 300 1542
Fax: 041 300 1542
E-mail: agfol@wp.pl
Contact: Mr. M. Agatowski, Managing Director

Parent company: Privately Owned
Year founded: 1992

Processes operated: Injection moulding, Blow moulding

AGLOPLAST

Orzechówko 43
87-213 Ryńsk
Tel: 056 688 5303
Fax: 056 687 3701
E-mail: agloplast@agloplast.com.pl
Website: www.agloplast.com.pl
Contact: Mr. Z. Ratajczak, Owner/General Director
Parent company: Privately Owned

Processes operated: Compounding

AGLOPLAST

ul. Jaszczurkowców 1
87-213 Ryńsk
Tel: 056 688 5324
Fax: 056 688 5332
E-mail: agloplast@agloplast.com.pl
Website: www.agloplast.com.pl
Contact: Mr. Z. Ratajczak, Owner/General Director

Parent company: Privately Owned

Processes operated: Compounding

AGORA PRODUKCJA HANDEL KAZIMIERZ KOZŁOWSKI

Rynek 5
88-140 Gniewkowo
Tel: 052 351 0767
Fax: 052 351 0767
E-mail: agroplast@wp.pl
Contact: Mr. K. Kozłowski, Proprietor
Parent company: Privately Owned
Processes operated: Injection moulding

AHME-WYTW. ART. Z TW. SZT. Z.P.H.U.

ul. Piastowska 50D
58-240 Piława Górna
Tel: 074 837 2980
Fax: 074 837 2981
E-mail: ahme@wp.pl
Contact: Mr. E. Kuszka, Proprietor
Parent company: Privately Owned
Year founded: 1990

Processes operated: Injection moulding

AIP Sp. z o.o.

ul. Kujawska 4
91-230 Łódź
Tel: 042 652 8588/8899
Fax: 042 655 8899
E-mail: aip@mtl.pl
Website: www.aip-formy.com.pl
Contact: Mr. M. Orczyk, General Director (based in Gliwice)
Parent company: Privately Owned
Year founded: 1993

Processes operated: Injection moulding

ERSI POLAND Sp. z o.o.

Type: Custom
 Polymers processed: ABS, PP, POM, PA, PMMA, PC
 Polymer throughput: Between 1001 - 1500 tonnes
 Markets served: Automotive, Bumpers; Dashboard Components; Fuel Systems Components.
 Services offered: Tool Manufacture, U/S Welding, Assembly, Insert Moulding
 Number of machines: 40
 Minimum lock: 80
 Maximum lock: 3600
 Maximum shot: 25

ES-SYSTEM WILKASY Sp. z o.o.

Type: Custom, Proprietary Products
 Polymers processed: PS, ABS, LDPE, PP, PA, PMMA, PC, GFPA.
 Polymer throughput: Between 51 - 100 tonnes
 Markets served: Electrical, Components for Light Fittings; Lighting Equipment.
 Services offered: Tool Design, Tool Manufacture, H/F Welding, Assembly, Machining
 Number of machines: 7
 Minimum lock: 160
 Maximum lock: 1600
 Maximum shot: 5000

EURONYL ASSEMBLING Sp. z o.o.

Type: Custom
 Polymers processed: PS, ABS, PP, POM, PA, PC, PBT, PPS.
 Polymer throughput: Between 251 - 500 tonnes
 Markets served: Automotive, Household, Crates/Boxes, Hangers; Automotive Mats; Feeding Tables for Birds.
 Services offered: Tool Design, Tool Manufacture, U/S Welding, Assembly
 Number of machines: 23
 Minimum lock: 30
 Maximum lock: 800
 Minimum shot: 0.5
 Maximum shot: 3000

EURO-PLAST PPHU

Type: Custom
 Polymers processed: LDPE, HDPE, PP
 Polymer throughput: Less than 50 tonnes
 Markets served: Automotive, Cosmetics/Toiletries, Closures
 Number of machines: 2
 Minimum lock: 60
 Maximum lock: 100
 Minimum shot: 50
 Maximum shot: 400

EUROPLASTIC POLSKA Sp. z o.o.

Type: Custom, Proprietary Products
 Polymers processed: PS, LDPE, HDPE, PP, Flex PVC
 Polymer throughput: Between 3001 - 5000 tonnes
 Markets served: Building, Horticultural/Agricultural, Household, Crates/Boxes
 Services offered: Tool Design, Tool Manufacture
 Number of machines: 13
 Minimum lock: 15
 Maximum lock: 500
 Maximum shot: 1500

EWPLAST

Type: Custom
 Polymers processed: PS, ABS, LDPE, HDPE, PP, POM, PMMA, PC, PBT, All Thermosets. Any Material Customer Requires.
 Polymer throughput: Between 251 - 500 tonnes
 Markets served: Horticultural/Agricultural, Leisure/Sport, Technical Mouldings.
 Services offered: Tool Design, Tool Manufacture
 Number of machines: 22
 Minimum lock: 30
 Maximum lock: 650
 Minimum shot: 320
 Maximum shot: 2000

F.P.H. WOJCIECH FRANKE

Type: Custom
 Polymers processed: PS, ABS, PP
 Polymer throughput: Between 101 - 250 tonnes
 Markets served: Automotive, Building
 Number of machines: 4
 Maximum lock: 160
 Maximum shot: 350

FABRYKA OKUĆ MEBLOWYCH STALMOT Sp. z o.o.

Type: In House
 Polymers processed: LDPE, PP, PA
 Polymer throughput: Less than 50 tonnes
 Markets served: Furniture Accessories.
 Services offered: JIT, Assembly
 Number of machines: 8

FABRYKA PLASTIKÓW GLIWICE Sp. z o.o.

Type: Custom
 Polymers processed: PS, SAN, ABS, PP, POM, PA, PMMA, PC, PBT, PC/ABS.
 Polymer throughput: Between 1501 - 3000 tonnes
 Markets served: Automotive, Electrical, Telectron, Printers Components; TV Set Casings; Electric Switches; Car Accessories.
 Services offered: U/S Welding, Pad Printing, Assembly, Twin shot Moulding
 Number of machines: 15
 Minimum lock: 30
 Maximum lock: 2700
 Minimum shot: 30
 Maximum shot: 14000