

PERFIL

2008

**The Brazilian Plastics
Processing Industry**

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A ABIPLAST Brazilian Plastics Industry Association

Formed in April 1967, the membership profile of ABIPLAST – The Brazilian Association of the Plastics Industry – brings together hundreds of companies, small, medium and large industries specializing in the processing of plastics and based in the most diverse regions of the country.

✓ABIPLAST SERVICES

- ✓ Political and economical representation of the sector;;
- ✓ Active participation in trade fairs and events in Brazil and abroad;;
- ✓ Courses and lectures, as well as business and social events;;
- ✓ Statistical analyses of the plastics sector;;
- ✓ Foreign trade;
- ✓ Legal guidance;
- ✓ Environment and recycling;
- ✓ Weekly newsletter;
- ✓ Industrial committees;
- ✓ Trade arrangements and partnerships.

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COMPANIES IN THE PLASTICS SECTOR

According to data from RAIS/MTE for 2007, the plastics processing sector comprises 11,329 active establishments – that remained practically stable relative to 2006, when there were 11,263 companies (an increase of 0.5% – 66 new establishments).

The sector contains a large number of small companies. The few large companies have a strong presence within the market and are highly competitive in terms of technology and differentiated products.

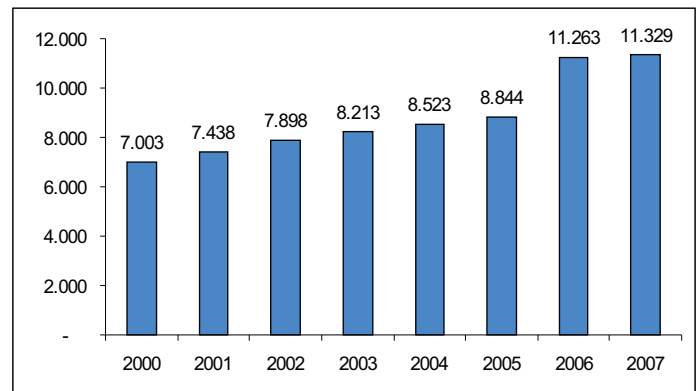
Of the 11,329 companies in the sector, 94.3% are considered small companies (up to 99 employees), 5.29% are medium-scale companies (up to 499 employees) and only 1% are large companies (more than 500 employees).

Data referring to company types also provide a parameter of the sizes of the companies. It can be seen that 85% are limited companies, 1.2% are privately help corporations and 0.3% are publicly held corporations and 11% are individual entrepreneurs.

Approximately 85% of plastics processing companies are situated in the South and Southeast of the country. São Paulo state has a concentration of 44.6% of all the establishments in Brazil (5,061 establishments). Rio Grande do Sul has 11%; Santa Catarina 8%; Paraná, 8%; Minas Gerais 7%, and Rio de Janeiro has 5% of the total number of Brazilian establishments.

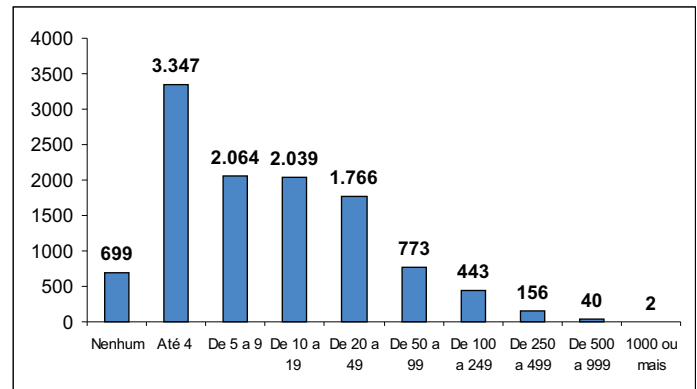
According to the most recent data (IBGE-PIA-Empresa 2006) the sector in 2007 represented around 3% of all existing companies in Brazil.

**Plastics processing companies
2000 / 2007**



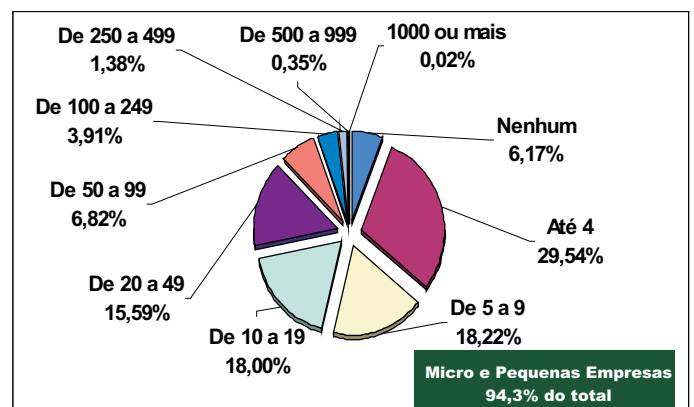
Source: RAIS / MTE 2007

**Company sizes by number of
employees 2007**



Source: RAIS / MTE 2007

**Company sizes by number of
employees 2007 (%)**



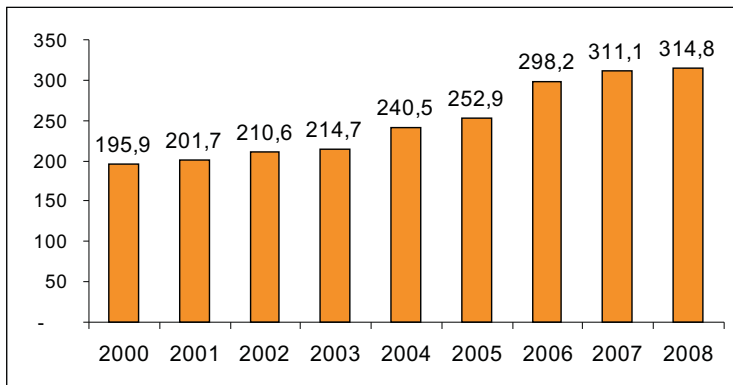
Source: RAIS / MTE 2007

HIGHLIGHTS

- 11,329 companies in 2007 (increase of 0.59% on the previous year)
- 94.3% of the companies are small or medium scale
- 85% of Brazilian companies are in the Southeast and South of Brazil

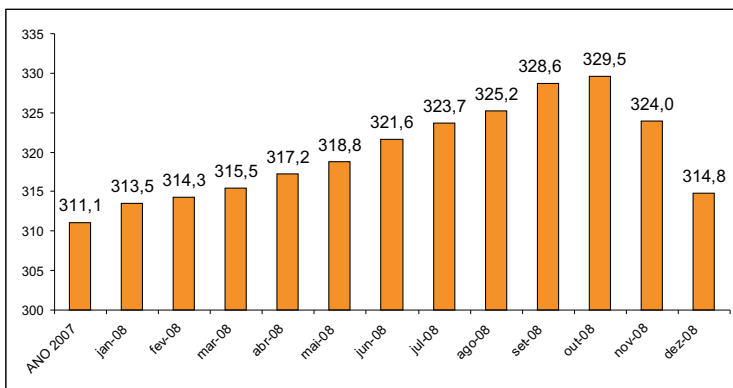
EMPLOYEES IN THE PLASTICS SECTOR

Employees in the plastics sector 2000 / 2008 (in 1000s of people)



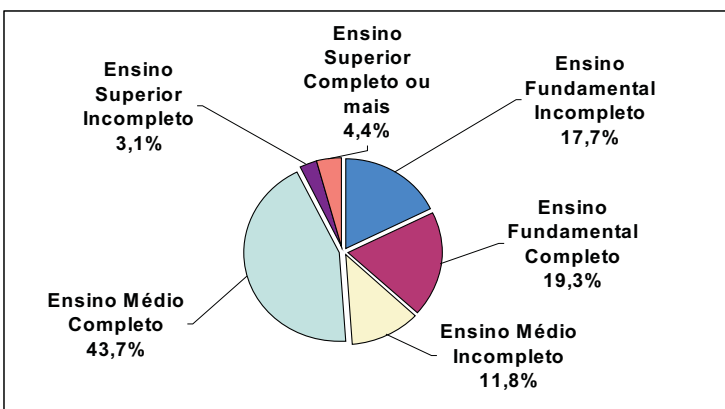
Source: RAIS 2007 / CAGED – Jan–Dez '08 – MTE

Trends in the number of employees in the plastics sector Jan/Dec 2008 (in 1000s of people)



Source: RAIS 2007 / CAGED – Jan–Dez '08 – MTE

Level of education of employees in the plastics sector (%)



Source: RAIS 2007 / CAGED – Jan–Dez '08 – MTE

One of the characteristics of the plastics processing industry is its intensive use of workforce. Estimates for 2008 indicate that the sector employed 314,794 employees directly (RAIS/CAGED), representing a growth of 1.18% relative to 2007, when there were 311,118 employees in the sector.

From 2007 to 2008, 3,676 new direct employees were hired, even considering the impact of the economic crisis, which could be seen from October 2008 with a reduction in the number of positions.

Of the total number of employees in the plastics sector, 81% are allocated directly in production, 15% work in the administrative and marketing fields, and the remaining 4% refer to owners and partners (IBGE: PIA).

As for the level of education of the workforce employed in the plastics sector, it can be seen that 48.8% have not completed high school, 43.7% have high-school education, 3.1% are studying at degree level and 4.3% have a college degree. (RAIS 2007)

HIGHLIGHTS

Employees in the plastics sector

314,794 employees in 2008

(increase of 1.18% relative to the previous year)

The sector is labor intensive

81% of employees are directly involved in production

15% of employees are involved in administrative areas

43.7% of employees in the sector have completed high-school education

4% of employees in the plastics processing sector have a college degree

Processed plastics – Structure of the sector

Companies and Employees in Plastic Sector



Fonte: RAIS / MTE 2007

	Laminados		Embalagens		Acess. Constr.Civil		Artefatos Diversos		TOTAL BRASIL	
	Empresas	Empregados	Empresas	Empregados	Empresas	Empregados	Empresas	Empregados	Empresas	Empregados
Total	360	14.919	2.911	103.383	137	8.087	7.921	188.405	11.329	314.794
Sao Paulo	178	7.948	1.169	42.954	43	2.065	3.671	88.545	5.061	141.512
Rio Grande do Sul	29	908	244	6.346	5	75	969	21.044	1.247	28.373
Santa Catarina	26	631	270	13.196	25	3.645	603	15.654	924	33.126
Parana	30	632	256	9.499	16	606	615	12.042	917	22.779
Minas Gerais	18	801	231	6.445	10	577	592	12.462	851	20.285
Rio de Janeiro	12	997	161	5.367	7	46	479	10.708	659	17.118
Bahia	14	979	92	3.283	9	280	168	4.620	283	9.162
Pernambuco	5	489	92	2.597	6	324	130	3.755	233	7.165
Goiás	8	48	87	3.032	3	63	127	1.840	225	4.983
Ceara	7	243	49	1.711	1	5	120	2.004	177	3.963
Amazonas	7	421	39	2.005	0	80	73	8.510	119	11.016
Espirito Santo	4	33	33	931	2	23	75	2.127	114	3.114
Paraiba	3	41	38	1.615	2	121	52	1.008	95	2.785
Mato Grosso	2	226	19	647	0	-	53	523	74	1.396
Rio Grande do Norte	4	149	19	725	2	56	29	446	54	1.376
Mato Grosso do Sul	2	69	19	419	0	-	26	588	47	1.076
Alagoas	2	132	19	605	1	34	22	726	44	1.497
Para	0	3	10	334	1	77	27	396	38	810
Distrito Federal	1	7	10	300	3	8	23	179	37	494
Sergipe	3	14	18	523	0	-	14	526	35	1.063
Piauí	0	-	11	367	1	2	16	226	28	595
Maranhao	1	57	10	312	0	-	14	163	25	532
Rondonia	3	89	6	22	0	0	7	18	16	129
Tocantins	0	-	6	83	0	-	10	247	16	330
Acre	1	2	3	65	0	-	2	26	6	93
Roraima	0	-	0	-	0	-	2	4	2	4
Amapa	0	-	0	-	0	-	2	18	2	18

Source: Companies and Employees – RAIS 2007 / CAGED – Movement of Employees January/December 2008

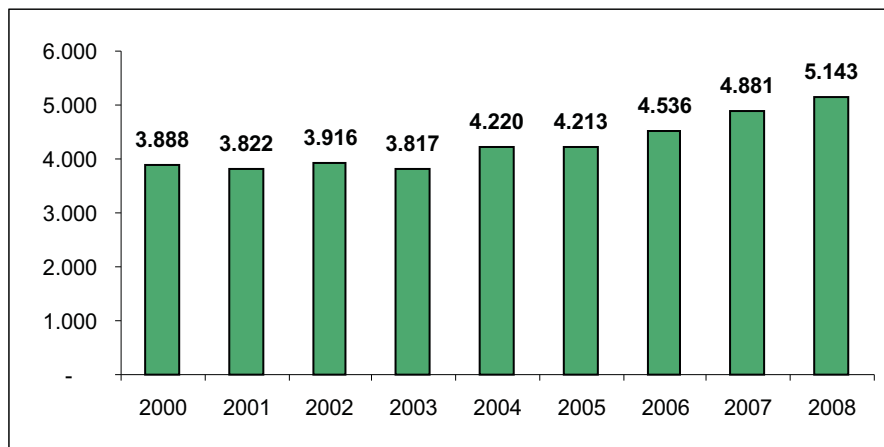
Nota: the number of companies refers to the year 2007 since these are the latest data available from RAIS/MTE
The number of employees refers to 2008, since it takes into account numbers of employees joining and leaving companies throughout the year as supplied by CAGED/MTE

PRODUCTION AND DEMAND FOR PROCESSED PLASTICS

In 2008 the plastics processing sector converted 5.14 million tons of thermoplastic resins, representing an increase of 5.3% relative to the production of processed plastics in the previous year.

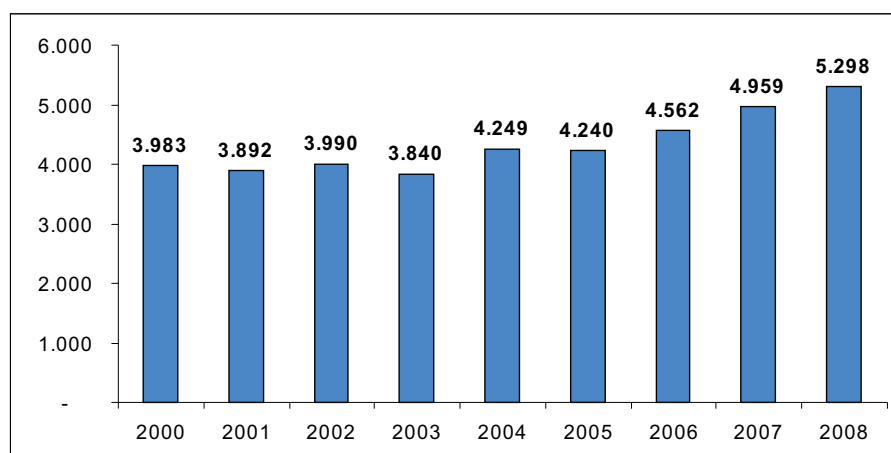
At the same time, the apparent demand for processed plastics was 5.29 million tons, 6.8% greater than in 2007. Compared to year 2000, the accumulated growth in demand for processed plastics was 33%, since the consumption in 2008 was 1.3 million tons more than in 2000.

Production of processed plastics products (in 1000 tons)



Source: ABIQUIM / MDIC

Apparent demand for processed plastics products (in 1000 tons)



Source: ABIQUIM / MDIC

HIGHLIGHTS

Production of 5.14 million tons of processed plastics products in 2008

Increase of 5.3% in processed plastics production relative to 2007

Apparent demand of 5,29 million tons of processed plastics products

Increase of 6.8% in apparent demand for processed plastics relative to 2007

PRODUCTION VOLUMES OF PROCESSED PLASTICS JANUARY TO DECEMBER 2008

The monthly indicators of production volume issued by IBGE (PIM-PF) in relation to the plastics sector reveal a positive trend in production levels until October 2008, when a reversal of this trend was recorded.

It is notable that the indicators for the segments that make up the plastics processing sector (according to the CNAE classification) closely follow the level of productivity for Brazilian industry (General Industry).

Laminates

Laminate production started to show growth in the second quarter of 2008, reaching a production level in July '08 14.4% greater than in January of the same year. In November, however, production fell by 8.17% relative to October, and the drop in December was 33.1% relative to the previous month.

In the sum total for the year (January to December 2008 compared to the same period in the previous year) the plastic laminates sector showed a contraction of 2.1% in productivity.

Packaging

The trend in production volumes for plastic packaging was without major oscillations through the year. The most productive month in the packaging sector was July 2008, registering 4.6% more than January of the same year.

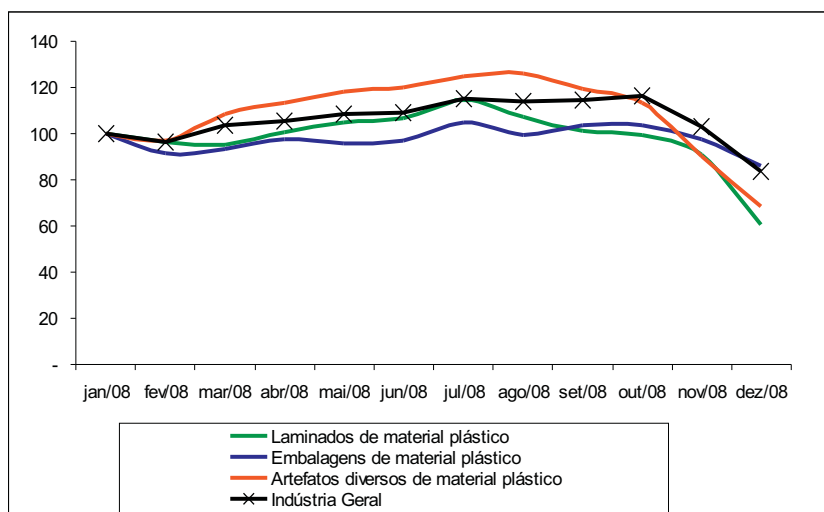
The productivity of plastic packaging companies remained stable (0.59% growth) in the sum total for January to December 2008 compared to the same period in 2007.

Miscellaneous plastic goods

Through 2008 the sector for the production of miscellaneous plastic goods showed strong growth starting in March and diminishing from September. August was the most productive month, with the sector producing 26.3% more than in the month of January. From October there was a reversal in the trend, closing December with productivity 9.3% less than recorded for the start of the year.

Looking at the sum total for January to December 2008, the production of miscellaneous plastic goods was 6.2% greater than for the same period of the previous year.

Production Volume Index (basis 100 for January 2008)



Source: IBGE / PIM-PF

HIGHLIGHTS

Production volume index – sum total for January to December 2008

Laminates – fall of 2.11% in production volume relative to 2007

Packaging – stable production relative to 2007 (increase of 0.59%)

Miscellaneous goods – increase of 6.2% relative to the sum total of production for 2007

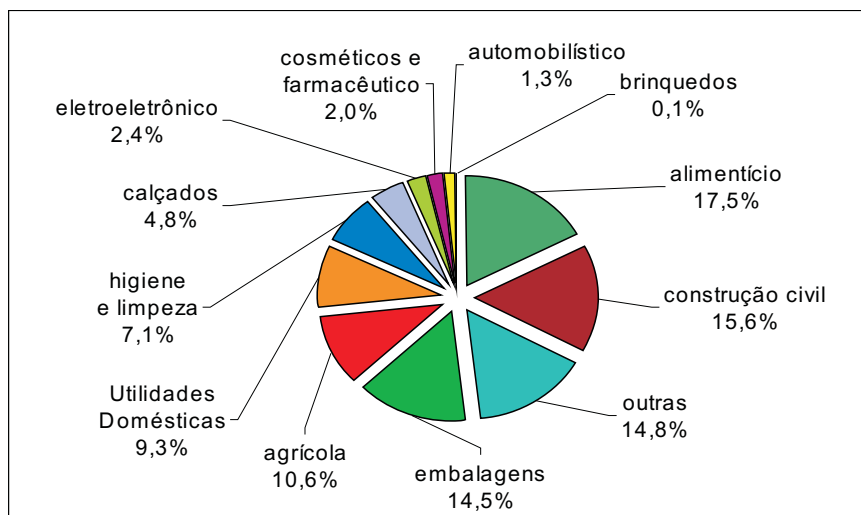
SEGMENTATION OF THE PROCESSED PLASTICS MARKET

The segmentation of the processed plastics market is always a complicated task given that plastic products are increasingly present in practically all segments, be they intermediates or finished goods.

Of the total Brazilian demand for plastics, an estimated 17.5% are destined for the food industry; 15.6% for civil construction; 14.5% for the

manufacture of packaging (PET bottles, industrial packaging, etc.); 10.6% for agriculture; 9.3% for household utilities; 7.1% for hygiene and cleaning; 4.8% for shoe manufacture; 2.4% for electrical and electronic goods; 2% for cosmetics/pharmaceuticals; 1.3% for the automotive industry and 0.1% for toy manufacture.

Segmentation of the processed plastics market



Source: ABIQUIM – Annual report of the Brazilian chemical industry 2008 (approximate end uses for polymers)

HIGHLIGHTS

Indication of the types of products that make up each market segment

Food (17.5%) (PP: reels, pots, lids, “big bags”, vials, small and large bottles and 5-liter tubs; LDPE and LLDPE: liners, labels, sacks, shrinkwrap, lids, vials; HDPE: buckets, boxes, lids, jars, chemical barrels; EVA: liners, adhesives)

Civil Construction (15.6%) (LDPE and LLDPE: tarpaulins, sacks, pipes; HDPE: sheets, profiles, pipes and water tanks; PVC: pipes, profiles, connections, hoses, tiles)

Packaging (14.5%) (HDPE: vials, tanks, buckets and chemical barrels for chemicals; PET: bottles)

Agricultural (10.6%) (LDPE and LLDPE: tarpaulins, sacks, lids, pipes, hoses; HDPE: vials, chemical barrels, lids, pots, pipes, boxes; PP: sacks, technical fabrics)

Household utilities (9.3%) (PP: boxes, UD, PS: disposables)

Hygiene/cleaning (7.1%) (LDPE/LLDPE/HDPE: technical reels, shrinkwrap, lids, vials; PP: vials, fiber for diapers and sanitary towels)

Shoes (4.8%) (shoes and synthetic fibers)

Electrical/electronic goods (2.4%) (*components for electrical/electronic goods)

Cosmetics/pharmaceuticals (2%) (HDPE: lids, jars, vials)

Automotive (1.3%) (HDPE: tanks, technical parts; PP:*internal coatings for vehicles, bumpers, fenders, dashboards)

Processed plastics – Turnover for the sector

TURNOVER OF THE PROCESSED PLASTICS SECTOR

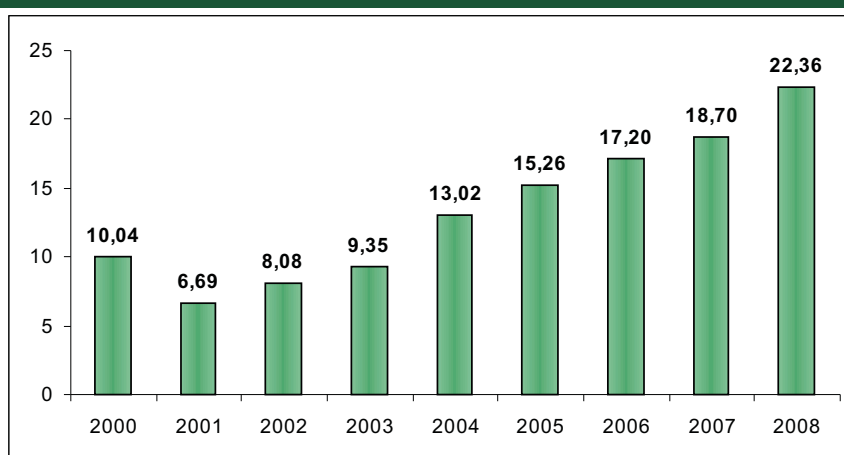
The plastics sector had a turnover of R\$ 40.9 billion in 2008, representing an increase of 12.2% relative to the previous year. Looking at the series of results since 2000, the sector has a mean annual growth of 9.3%.

In US dollars, the turnover value in 2008 for the plastics processing sector was US\$ 22.3 billion, representing a growth of 19% relative to the

previous year.

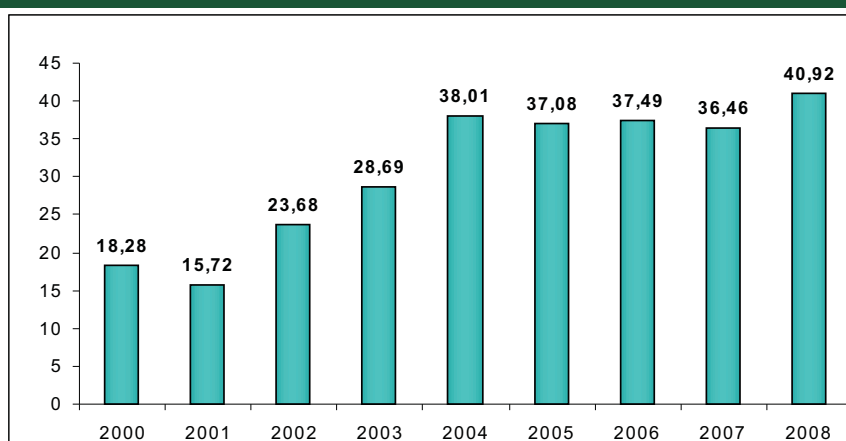
The positive indicators for the turnover of the sector are due to the good performance of the economy in the first three quarters of the year. However, the scenario became less favorable with high raw material costs and an increased exchange rate from October 2008.

TURNOVER OF THE PROCESSED PLASTICS SECTOR US\$ Billions



Source: ABIPLAST estimate taking into account the total volume of demand for plastic goods

TURNOVER OF THE PROCESSED PLASTICS SECTOR R\$ Billions



Source: ABIPLAST estimate taking into account the total volume of demand for plastic goods

HIGHLIGHTS

The gross turnover for the plastics processing sector in 2008 was R\$ 40.9 billion

Increase in gross turnover in Real of 12.3% relative to 2007

In Dollars the processing sector had a gross turnover of US\$ 22.3 billion

Increase in gross turnover in Dollars of 19.6% relative to 2007

Processed plastics – Foreign trade

FOREIGN TRADE IN PROCESSED PLASTICS GENERAL TOTAL

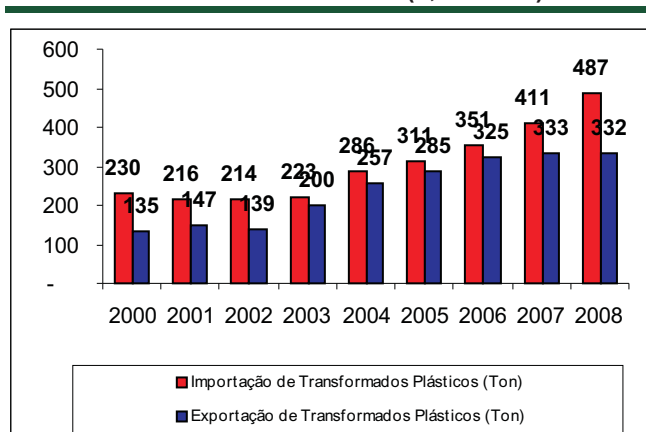
In 2008, 332 thousand tons of processed plastic products were exported and 487 thousand tons imported.

The quantity of plastic exported remained practically on the same level relative to the previous year, breaking from the constant increases in exported products that had occurred since 2002. Meanwhile, imports of plastic products increased by 18.6%, keeping the rhythm of gradual growth.

In terms of value, exports of processed plastic products in 2008 totaled US\$ 1.3 billion, representing an increase of 17.4% relative to the previous year. Meanwhile, imports totaled US\$ 2.3 billion, corresponding to an increase of 30.4% relative to 2007.

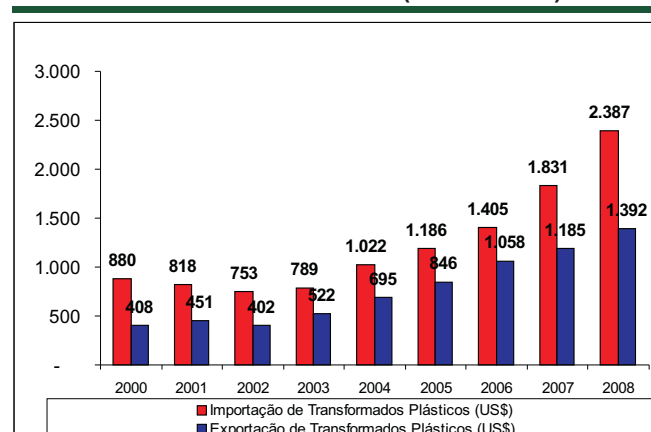
There was a trade deficit of US\$ 996 million in processed plastics, 54.1% greater than that of 2007. This is the largest deficit recorded since 1997, when monitoring of these values started.

**Imports and Exports
Processed Plastics (1,000 Ton)**



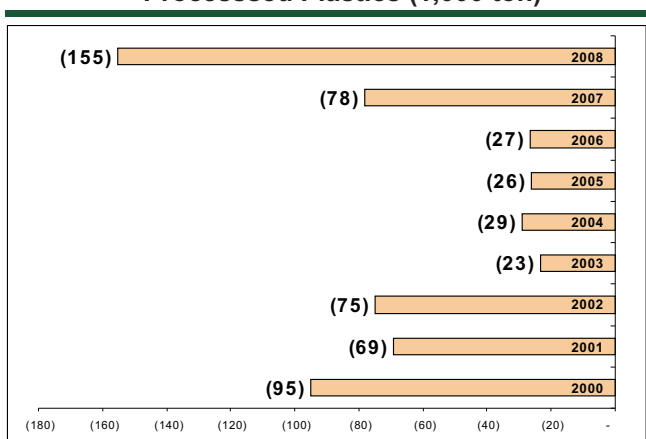
Source: ALICE / MDIC system

**Imports and Exports
Processed Plastics (US\$ Million)**



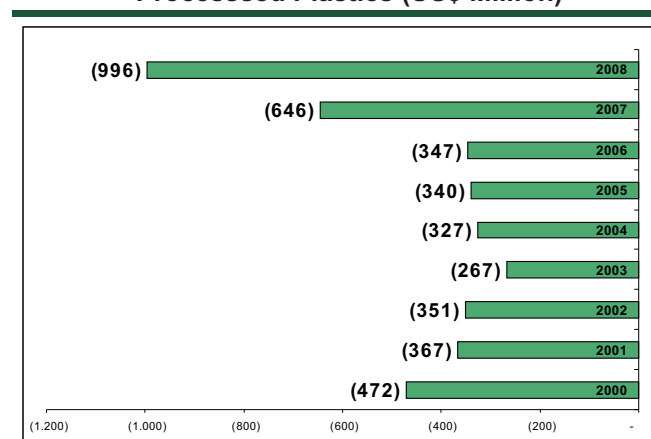
Source: ALICE / MDIC system

**Trade Balance
Processed Plastics (1,000 ton)**



Source: ALICE / MDIC system

**Trade Balance
Processed Plastics (US\$ Million)**



Source: ALICE / MDIC system

HIGHLIGHTS

Processed plastic products – Foreign trade

Exports – 332 thousand tons and US\$1.3 billion in 2008

Imports – 487 thousand tons and US\$ 2.3 billion in 2008

Trade deficit of 155 thousand tons and US\$ 996 millions – record since 1997

FOREIGN TRADE OF PROCESSED PLASTICS PRINCIPAL COUNTRIES (IN US\$ MILLION)

Of the total of US\$ 1.3 billion exported by Brazil in 2008, Argentina was responsible for 26%, the United States 14%, Chile 7%, Netherlands 6%, Venezuela 5%, and other countries 42%.

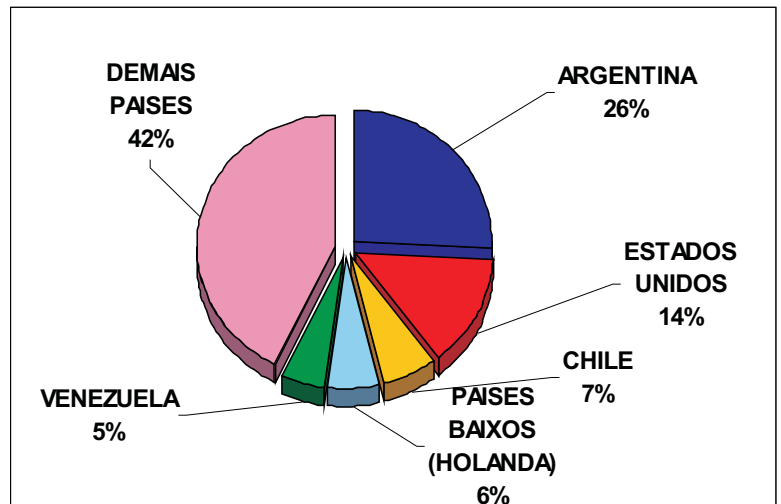
Meanwhile, Brazilian imports in 2008 totaled US\$ 2.3 billion. Of this total the US accounted for 19%, China 14%, Argentina 10%, Germany 10%, Italy 5%, and other countries 42%.

Exports to Argentina increased by 18.4% relative to 2007, while for the same period Brazilian imports originating in that country increased by 42.1%. Looking at the trade between Brazil and Argentina, in 2008 Brazil came out with a positive balance of US\$ 113 million, a reduction of 13% relative to 2007.

As for the United States, in 2008 exports increased by 14.1% and imports by 17.5%, representing a deficit for Brazil of US\$ 260 million, corresponding to an increase of 20% relative to 2007.

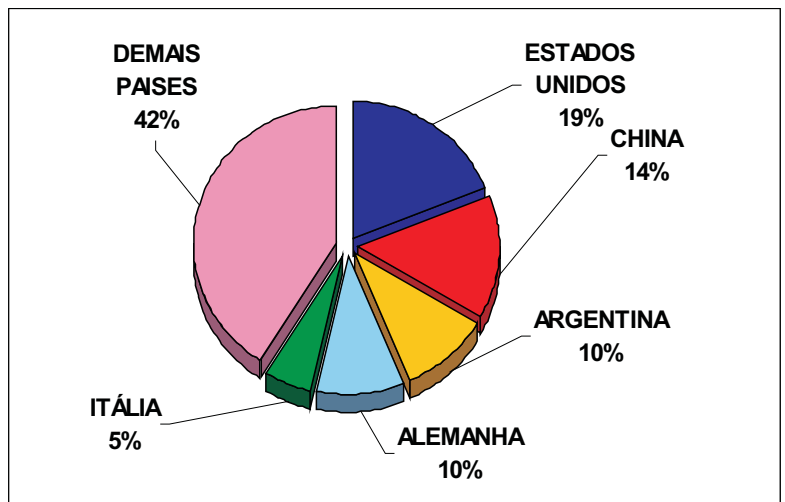
In trade with China in 2008 it suits to highlight the increase of 65.4% in imports while exports presented a fall of 28.1% relative to 2007.

Exports of processed plastics Principal Countries (in US\$ million)



Fonte: Sistema ALICE / MDIC

Imports of processed plastics Principal Countries (in US\$ million)



Fonte: Sistema ALICE / MDIC

HIGHLIGHTS

Processed plastic products – Foreign trade

Principal destinations for Brazilian exports – Argentina (26%), United States (14%), Chile (7%), Netherlands (6%) and Venezuela (5%).

Principal source countries for Brazilian imports – United States (19%), China (14%), Argentina (10%), Germany (10%) and Italy (5%).

Processed plastics – Foreign trade

FOREIGN TRADE IN PROCESSED PLASTICS EXPORTS BY ECONOMIC BLOC

PAIS	2007 (Janeiro/Dezembro)			2008 (Janeiro/Dezembro)			% DE CRESCIMENTO		
	Peso (Ton)	US\$ FOB	US\$ FOB/ton	Peso (Ton)	US\$ FOB	US\$ FOB/ton	Peso (Ton)	US\$ FOB	US\$ FOB/ton
UNIAO EUROPEIA	29.238,14	136.755.005,00	4.677,28	31.432,44	183.247.261,00	5.829,88	7,50	34,00	24,64
ALEMANHA	3.694,60	18.301.365,00	4.953,54	2.966,50	18.541.718,00	6.250,37	(19,71)	1,31	26,18
ESPAÑA	10.231,02	23.482.511,00	2.295,23	9.740,43	25.541.607,00	2.622,23	(4,80)	8,77	14,25
FRANCA	949,58	10.040.105,00	10.573,21	740,69	8.180.111,00	11.043,91	(22,00)	(18,53)	4,45
ITALIA	1.970,91	10.517.197,00	5.336,21	1.977,82	8.295.785,00	4.194,41	0,35	(21,12)	(21,40)
PAISES BAIXOS (HOLANDA)	4.975,26	44.478.160,00	8.939,87	5.986,06	82.644.156,00	13.806,10	20,32	85,81	54,43
REINO UNIDO	2.058,49	7.338.160,00	3.564,83	3.650,44	13.631.322,00	3.734,16	77,34	85,76	4,75
* DEMAIS PAISES DA UE	5.358,28	22.597.507,00	4.217,31	6.370,50	26.412.562,00	4.146,07	18,89	16,88	(1,69)
MERCOSUL	111.662,34	375.621.615,00	3.363,91	115.976,91	458.679.828,00	3.954,92	3,86	22,11	17,57
ARGENTINA	89.444,10	305.062.455,00	3.410,65	89.173,39	361.331.276,00	4.052,01	(0,30)	18,45	18,80
PARAGUAI	12.391,14	38.422.262,00	3.100,79	15.267,92	53.621.316,00	3.512,02	23,22	39,56	13,26
URUGUAI	9.827,10	32.136.898,00	3.270,23	11.535,60	43.727.236,00	3.790,63	17,39	36,07	15,91
ALADI (EXCETO MERCOSUL)	79.463,08	314.078.134,00	3.952,50	76.193,86	341.212.011,00	4.478,21	(4,11)	8,64	13,30
BOLIVIA	5.536,83	19.119.128,00	3.453,08	6.403,24	26.219.675,00	4.094,75	15,65	37,14	18,58
CHILE	24.955,73	87.147.424,00	3.492,08	22.229,54	90.726.211,00	4.081,34	(10,92)	4,11	16,87
COLOMBIA	12.889,55	48.438.708,00	3.757,98	11.362,76	53.043.760,00	4.668,21	(11,85)	9,51	24,22
CUBA	1.109,40	4.533.436,00	4.086,39	1.504,03	7.154.106,00	4.756,62	35,57	57,81	16,40
EQUADOR	2.876,27	10.734.258,00	3.732,01	4.674,41	17.320.508,00	3.705,39	62,52	61,36	(0,71)
MEXICO	11.129,29	49.863.430,00	4.480,38	8.190,88	42.922.579,00	5.240,29	(26,40)	(13,92)	16,96
PERU	7.173,89	24.312.211,00	3.388,99	8.165,61	31.873.194,00	3.903,35	13,82	31,10	15,18
VENEZUELA	13.792,12	69.929.539,00	5.070,25	13.663,39	71.951.978,00	5.266,04	(0,93)	2,89	3,86
CANADA	3.965,28	13.905.106,00	3.506,71	3.230,63	13.853.543,00	4.288,19	(18,53)	(0,37)	22,29
ESTADOS UNIDOS	55.380,51	167.503.803,00	3.024,60	51.971,61	191.122.475,00	3.677,44	(6,16)	14,10	21,58
ORIENTE MEDIO	2.505,12	7.461.072,00	2.978,33	2.811,82	10.892.198,00	3.873,72	12,24	45,99	30,06
ARABIA SAUDITA	1.438,60	3.101.793,00	2.156,12	1.378,23	4.010.406,00	2.909,82	(4,20)	29,29	34,96
EMIRADOS ARABES UNIDOS	153,24	1.116.370,00	7.285,11	596,93	3.148.350,00	5.274,24	289,54	182,02	(27,60)
ISRAEL	610,82	1.715.950,00	2.809,26	391,82	1.398.541,00	3.569,35	(35,85)	(18,50)	27,06
LIBANO	20,62	132.595,00	6.430,41	259,34	735.810,00	2.837,24	1.157,71	454,93	(55,88)
* DEMAIS PAISES DO ORIENTE MEDIO	281,84	1.394.364,00	4.947,36	185,50	1.599.091,00	8.620,44	(34,18)	14,68	74,24
ASIA (EXCLUSIVE ORIENTE MEDIO)	10.646,69	35.979.175,00	2.636,48	9.923,82	30.675.707,00	3.091,12	(27,28)	(14,74)	17,24
CHINA	7.019,58	11.128.567,00	1.585,36	3.983,94	7.992.464,00	2.006,17	(43,25)	(28,18)	26,54
CINGAPURA	1.364,23	10.078.785,00	7.387,89	723,76	6.458.050,00	8.922,92	(46,95)	(35,92)	20,78
HONG KONG	3.130,87	3.264.070,00	1.042,54	2.566,26	1.828.247,00	712,42	(18,03)	(43,99)	(31,67)
JAPAO	260,27	2.169.747,00	8.336,52	941,99	4.216.861,00	4.476,55	261,93	94,35	(46,30)
* DEMAIS PAISES DA ASIA	1.871,74	9.338.006,00	4.988,94	1.707,87	10.180.085,00	5.960,69	(8,75)	9,02	19,48
AFRICA (EXCLUSIVE ORIENTE MEDIO)	10.520,52	48.287.415,00	3.858,82	17.141,18	71.613.420,00	4.177,86	36,98	48,31	8,27
AFRICA DO SUL	2.908,62	11.103.914,00	3.817,59	3.129,07	12.409.101,00	3.965,75	7,58	11,75	3,88
ANGOLA	4.003,69	18.366.032,00	4.587,28	7.873,29	38.106.552,00	4.839,98	96,65	107,48	5,51
EGITO	719,88	5.872.341,00	8.157,39	280,12	1.923.621,00	6.867,13	(61,09)	(67,24)	(15,82)
NIGERIA	1.641,68	4.730.263,00	2.881,36	2.951,47	9.042.134,00	3.063,60	79,78	91,15	6,33
* DEMAIS PAISES DA AFRICA	3.239,65	8.214.865,00	2.535,73	2.907,23	10.132.012,00	3.485,11	(10,26)	23,34	37,44
DEMAIS BLOCOS	24.148,27	85.107.652,00	3.524,38	23.326,94	90.437.577,00	3.876,96	(3,40)	6,26	10,00
TOTAL	332.522,95	1.184.698.977,00	3.562,76	332.009,21	1.391.734.020,00	4.191,85	(0,15)	17,48	17,66

Soruce: ALICE / MDIC

Processed plastics – Foreign trade

FOREIGN TRADE IN PROCESSED PLASTICS IMPORTS BY ECONOMIC BLOC

PAIS	2007 (Janeiro/Dezembro)			2008 (Janeiro/Dezembro)			% DE CRESCIMENTO		
	Peso (Ton)	US\$ FOB	US\$ FOB/ton	Peso (Ton)	US\$ FOB	US\$ FOB/ton	Peso (Ton)	US\$ FOB	US\$ FOB/ton
UNIAO EUROPEIA	67.845,37	564.286.897,00	8.317,25	80.474,41	723.192.278,00	8.986,61	18,61	28,16	8,05
ALEMANHA	16.591,29	172.605.494,00	10.403,38	19.777,56	236.436.416,00	11.954,78	19,20	36,98	14,91
ESPAHA	4.919,55	39.948.559,00	8.120,37	6.030,30	49.108.441,00	8.143,61	22,58	22,93	0,29
FRANCA	8.323,84	78.611.891,00	9.444,19	9.713,15	96.944.218,00	9.980,72	16,69	23,32	5,68
ITALIA	14.778,96	105.586.939,00	7.144,41	15.598,88	127.490.737,00	8.173,07	5,55	20,74	14,40
PAISES BAIXOS (HOLANDA)	1.614,98	16.049.087,00	9.937,64	1.861,48	17.750.623,00	9.535,76	15,26	10,60	(4,04)
REINO UNIDO	5.884,03	48.006.602,00	8.158,80	5.541,87	51.133.685,00	9.226,79	(5,82)	6,51	13,09
* DEMAIS PAISES DA UE	15.732,72	103.478.325,00	6.577,27	21.951,17	144.328.158,00	6.574,96	39,53	39,48	(0,04)
MERCOSUL	124.506,22	293.330.687,00	2.355,95	143.607,03	393.491.137,00	2.740,05	15,34	34,15	16,30
ARGENTINA	60.031,89	174.431.451,00	2.905,65	73.488,90	247.931.400,00	3.373,73	22,42	42,14	16,11
PARAGUAI	12.995,22	21.809.226,00	1.678,25	13.115,06	24.892.213,00	1.897,99	0,92	14,14	13,09
URUGUAI	51.479,11	97.090.010,00	1.886,01	57.003,07	120.667.524,00	2.116,86	10,73	24,28	12,24
ALADI (EXCETO MERCOSUL)	24.314,81	80.652.817,00	3.317,02	24.323,68	84.372.680,00	3.468,75	0,04	4,61	4,57
BOLIVIA	299,34	123.535,00	412,69	245,95	80.459,00	327,14	(17,84)	(34,87)	(20,73)
CHILE	4.992,26	16.354.904,00	3.276,05	6.024,72	21.411.876,00	3.554,00	20,68	30,92	8,48
COLOMBIA	5.454,37	16.886.900,00	3.096,03	2.623,30	11.288.427,00	4.303,14	(51,90)	(33,15)	38,99
CUBA	0,00	0,00	0,00	0,00	0,00	0,00			
EQUADOR	2.205,17	8.043.320,00	3.647,48	1.431,93	6.276.866,00	4.383,50	(35,06)	(21,96)	20,18
MEXICO	5.990,44	27.397.288,00	4.573,50	8.157,75	31.138.319,00	3.817,02	36,18	13,65	(16,54)
PERU	5.310,87	11.819.930,00	2.225,61	5.529,61	14.150.054,00	2.558,96	4,12	19,71	14,98
VENEZUELA	62,36	26.940,00	432,01	310,42	26.679,00	85,94	397,79	(0,97)	(80,11)
CANADA	2.068,73	17.949.079,00	8.676,38	2.927,86	30.522.449,00	10.424,83	41,53	70,05	20,15
ESTADOS UNIDOS	44.388,52	383.024.547,00	8.628,91	50.056,39	451.777.866,00	9.025,38	12,77	17,95	4,59
ORIENTE MEDIO	2.196,43	14.154.354,00	6.444,25	6.063,68	19.731.457,00	3.254,04	176,07	39,40	(49,50)
ARABIA SAUDITA	0,00	0,00	0,00	63,90	145.545,00	2.277,70			
EMIRADOS ARABES UNIDOS	123,02	371.289,00	3.018,12	4.419,52	11.192.765,00	2.532,57	3.492,52	2.914,57	(16,09)
ISRAEL	1.742,95	12.464.280,00	7.151,26	1.359,59	7.313.401,00	5.379,12	(21,99)	(41,33)	(24,78)
LIBANO	8,39	12.419,00	1.480,21	42,83	205.936,00	4.808,22	410,49	1.558,23	224,83
* DEMAIS PAISES DO ORIENTE MEDIO	322,07	1.306.366,00	4.056,16	177,84	873.810,00	4.913,46	(44,78)	(33,11)	21,14
ASIA (EXCLUSIVE ORIENTE MEDIO)	139.777,90	446.251.403,00	3.192,57	174.008,59	644.780.536,00	3.705,45	24,49	44,49	16,06
CHINA	85.975,74	206.371.766,00	2.400,35	114.985,08	341.448.356,00	2.969,50	33,74	65,45	23,71
CINGAPURA	1.738,14	9.594.109,00	5.519,76	1.253,73	7.109.712,00	5.670,85	(27,87)	(25,90)	2,74
HONG KONG	5.634,28	13.532.981,00	2.401,90	5.554,87	16.753.368,00	3.015,98	(1,41)	23,80	25,57
JAPAO	4.570,86	82.387.756,00	18.024,56	5.344,85	95.283.276,00	17.827,12	16,93	15,65	(1,10)
* DEMAIS PAISES DA ASIA	41.858,88	134.364.791,00	3.209,95	46.870,06	184.185.824,00	3.929,71	11,97	37,08	22,42
AFRICA (EXCLUSIVE ORIENTE MEDIO)	135,23	1.128.164,00	8.342,56	481,44	2.739.810,00	5.690,86	256,02	142,86	(31,79)
AFRICA DO SUL	82,72	895.487,00	10.825,52	252,01	1.849.921,00	7.340,67	204,65	106,58	(32,19)
ANGOLA	0,00	0,00	0,00	138,97	73.883,00	531,65			
EGITO	0,84	3.544,00	4.219,05	2,07	6.301,00	3.043,96	146,43	77,79	(27,85)
NIGERIA	0,12	659,00	5.491,67	0,01	53,00	5.300,00	(91,67)	(91,96)	(3,49)
* DEMAIS PAISES DA AFRICA	51,55	228.474,00	4.432,09	88,38	809.652,00	9.161,03	71,45	254,37	106,70
DEMAIS BLOCOS	5.552,94	29.743.892,00	5.356,42	5.253,20	36.870.157,00	7.018,61	(5,40)	23,96	31,03
TOTAL	410.786,15	1.830.521.840,00	4.456,14	487.196,28	2.387.478.370,00	4.900,44	18,60	30,43	9,97

Source: ALICE / MDIC

PRODUCTION AND DEMAND FOR THERMOPLASTIC RESINS (1000 TONS)

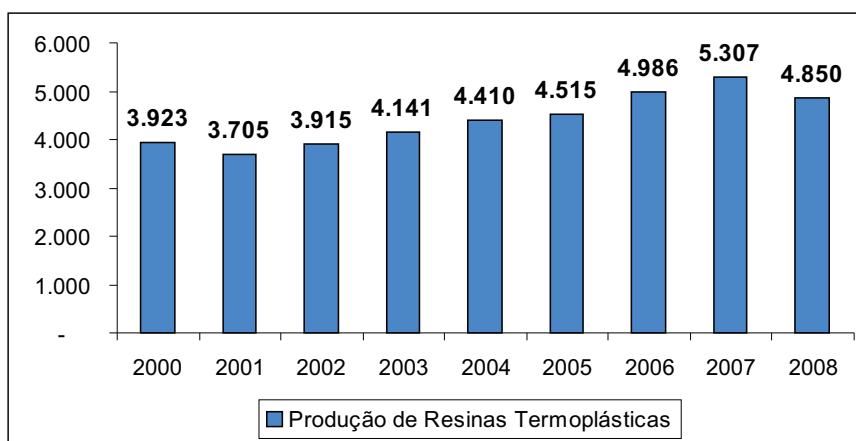
In 2008, 4.8 million tons of thermoplastic resins were manufactured, representing a reduction of 8.61% relative to the previous year, when 5.3 million tons of these resins were produced.

This reduction in production levels can be explained by the technical stoppages that occurred in the petrochemical centers at the end of the first half of

2008, as well as by the poor performance since October due to the current crisis.

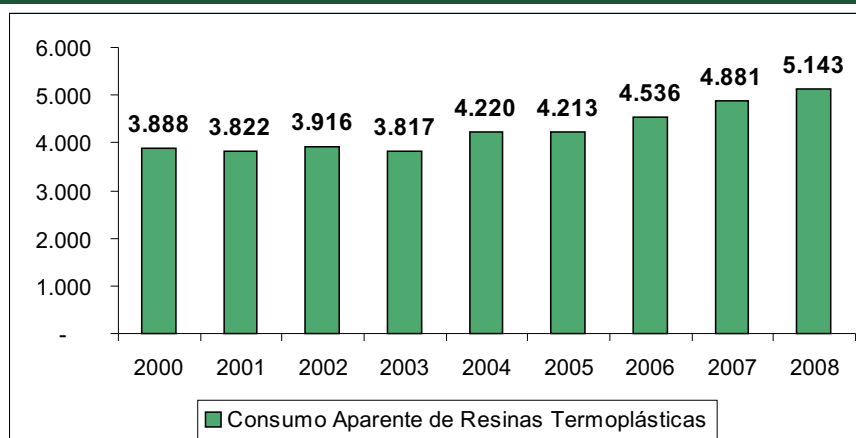
The Brazilian market registered an apparent demand of 5.1 million tons of thermoplastic resins, corresponding to an increase of 5.3% compared to the previous year.

Production of thermoplastic resins (1000 tons)



Source: ABIQUIM – SDI Annual Report 2008

Apparent demand for thermoplastic resins (1000 tons)



Source: ABIQUIM – SDI Annual Report 2008

HIGHLIGHTS

Production of 4.8 million tons of thermoplastic resins in 2008

Reduction of 8.6% in the production of thermoplastic resins relative to 2007

Apparent demand of 5.1 million tons of thermoplastic resins

Increase of 5.3% in apparent demand for thermoplastic resins relative to 2007

Thermoplastic resins – Installed capacity and investments

INSTALLED CAPACITY FOR THE PRODUCTION OF THERMOPLASTIC RESINS (1000 TONS)

Resina	Empresa	Localizacao	Capacidade Instalada
PEBD	Braskem	BA/RS	365.000
	Quattor	SP	270.000
	Triunfo	RS	160.000
	Total		795.000
PEBDL	Braskem	BA/RS	510.000
	IPQ (Atual Braskem)	RS	150.000
	Quattor (Antiga Riopol)	RJ	540.000
	Total		1.200.000
PEAD	Braskem	BA	600.000
	IPQ (Atual Braskem)	RS	550.000
	Quattor (Antiga Riopol)	RJ	540.000
	Solvay Indupa	SP	82.000
	Total		1.772.000
PP	Braskem	RS	560.000
	IPQ (Atual Braskem)	RS	180.000
	Quattor	BA/RJ/SP	685.000
	Total		1.425.000
PS	Basf	SP	190.000
	Dow Brasil	SP	190.000
	Innova	RS	135.000
	Videolar	AM	120.000
	Total		635.000
PVC	Braskem	AL/BA/SP	516.000
	Solvay Indupa	SP	270.000
	Total		786.000
EVA	Braskem	BA	150.000
	Quattor	SP	130.000
	Triunfo	RS	80.000
	Total		360.000
PET	Braskem	BA	78.000
	M&G Fibras e Resinas	MG/PE	290.000
	M&G Polimeros	PE	450.000
Total		818.000	

PROJECTS FOR INVESTMENT IN INCREASED PRODUCTION CAPACITY FOR RESINS

Produto	Ano Previsto	tipo	Empresa	Local	Capacidade Atual	Capacidade Futura	Expansão da Capacidade Produtiva
PEAD					-	430.000	430.000
	2013	Planejado / Em Estudo	Comperj	Itaboraí - RJ	-	430.000	
PEAD/PEBDL					-	230.000	230.000
	2008	Aprovado/Em Andamento	Quattor	Santo André - SP	-	230.000	
PEBDL					-	430.000	430.000
	2013	Planejado / Em Estudo	Comperj	Itaboraí - RJ	-	430.000	
Polietilenos					-	350.000	350.000
	2011	Planejado / Em Estudo	Dow Brasil	Minas Gerais - MG	-	350.000	
PP					685.000	2.210.000	1.525.000
	2011	Aprovado/Em Andamento	Quattor	Camaçari - BA	125.000	200.000	
	2012	Planejado / Em Estudo	Braskem	Camaçari - BA	560.000	860.000	
			Quattor	Paraná - PR	-	200.000	
	2013	Planejado / Em Estudo	Comperj	Itaboraí - RJ	-	850.000	
			Quattor	Mauá - SP	-	100.000	
PVC					1.060.000	1.540.000	480.000
	2008	Aprovado/Em Andamento	Solvay Indupa	Santo André - SP	270.000	300.000	
	2010	Planejado / Em Estudo	Solvay Indupa	Santo André - SP	300.000	360.000	
	2011	Aprovado/Em Andamento	Braskem	Marechal Deodoro - AL	240.000	440.000	
	2014	Planejado / Em Estudo	Braskem	Camacari - BA	250.000	440.000	
PVC - compostos					9.600	17.280	7.680
	2008	Aprovado/Em Andamento	Rionil	Duque de Caxias - RJ	9.600	17.280	
PET					-	600.000	600.000
	2013	Planejado / Em Estudo	Comperj	Itaboraí - RJ	-	600.000	

PLASTICS IN THE BRAZILIAN ECONOMY – INDICATORS

Performance indicators for the plastics processing sector								
2000	2001	2002	2003	2004	2005	2006	2007	2008
-	(2,29)	2,54	(3,77)	10,66	(0,23)	6,04	10,31	6,84

Trends in turnover in the plastics processing sector (R\$)								
2000	2001	2002	2003	2004	2005	2006	2007	2008
-	(14,01)	50,69	21,15	32,49	(2,44)	1,11	(2,76)	12,24

Trends in the number of employees in the plastics processing sector								
2000	2001	2002	2003	2004	2005	2006	2007	2008
	2,93	4,42	1,94	12,00	5,18	17,89	4,34	1,18

Trends in production per employee in the plastics processing sector (ton)								
2000	2001	2002	2003	2004	2005	2006	2007	2008
19,84	18,95	18,59	17,78	17,55	16,66	15,21	15,69	16,34

Demand per capita for processed plastics								
2000	2001	2002	2003	2004	2005	2006	2007	2008
23,41	22,57	22,85	21,71	23,72	23,38	24,49	26,70	27,74

Notes:

Indicators for trends in demand and turnover in the plastics processing sector are percentage variations in the amounts of apparent demand or turnover relative to the previous year.

The production per employee refers to the amount of production of processed plastics in tons over the number of employees in the processed plastics sector.

The demand per capita indicator for processed plastics corresponds to the total apparent demand for processed plastics over the estimated population count. The IBGE – Poplock population estimate was taken into account for 2008.

Brazil – Economic indicators

BRAZIL ECONOMIC INDICATORS

Gross domestic product (GDP) real annual variation (in %)								
2000	2001	2002	2003	2004	2005	2006	2007	2008
4,31	1,31	2,66	1,15	5,71	3,16	3,97	5,67	5,08

Gross domestic product (GDP) per capita (in R\$ thousand)								
2000	2001	2002	2003	2004	2005	2006	2007	2008
6,89	7,49	8,38	9,51	10,72	11,71	12,77	13,84	15,24

Nominal Gross domestic product (GDP; in R\$ million)								
2000	2001	2002	2003	2004	2005	2006	2007	2008
1.179.482	1.302.136	1.477.822	1.699.948	1.941.498	2.147.239	2.369.797	2.597.611	2.889.719

General industrial production – Index of the volume of production of Brazilian industry in general							
2007	2008	2008 T2	2008 T3	2008 T4	2008 M12	2009 M01	2009 M02
6,02	3,1	6,19	6,69	-6,28	-14,76	-17,44	-16,97

Unemployment rate (in % of the economically active population)							
2007	2008	2008 T2	2008 T3	2008 T4	2008 M12	2009 M01	2009 M02
9,29	7,89	8,07	7,77	7,3	6,8	8,2	8,5

Extended Consumer Price Index (IPCA)							
Annual inflation rate							
2007	2008	2008 T3	2008 T4	2009 T1	2009 M01	2009 M02	2009 M03
4,46	5,9	4,36	4,45	5,03	5,91	6,8	2,42

Nominal Exchange rate							
In Real per Dollar (mean for the period)							
2007	2008	2008 T3	2008 T4	2009 T1	2009 M01	2009 M02	2009 M03
1,95	1,83	1,67	2,28	2,31	2,31	2,31	2,31

Source: IPEADATA – IPEA database.
IBGE data / Banco Central do Brasil.

The data in the tables are for the year (YEAR), quarter (YEAR with a number corresponding to the quarter: Q1, Q2, Q3 or Q4) and month (YEAR with a number corresponding to the month: M-01 to 12)

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