

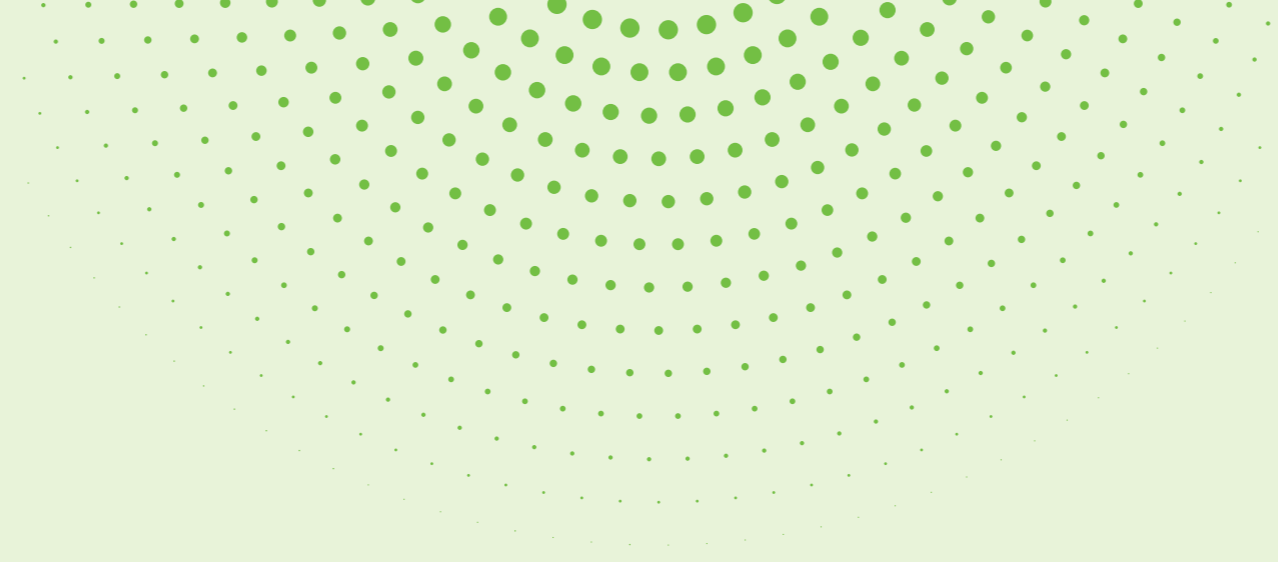
The Plastic Transformation
& Recycling Industries in Brazil

Perfil

2025



abiplast
Associação Brasileira da Indústria do Plástico



Perfil

2025

The Plastic
Transformation
& Recycling
Industries in Brazil

Prepared:



PORTUGUESE VERSION



Patrocínio Ouro



Patrocínio Prata



Patrocínio Bronze





Com um portfólio composto por soluções completas, a empresa oferece embalagens plásticas flexíveis e rígidas, resinas recicladas, compostos minerais, masterbatch branco e aditivos de performance, além de máquinas envolveroras de carga paletizada de alta tecnologia que otimizam a utilização de filmes, gerando economia e reduzindo o desperdício.

 <p>Compostos e Masterbatches</p>	 <p>Embalagens para Varejo</p>	 <p>Filmes BOPP</p>	 <p>Filmes Industriais</p>
 <p>Máquinas</p>	 <p>Filmes Técnicos HDPE</p>	 <p>Filmes Técnicos Lisos e Impressos</p>	 <p>Filmes Laminados</p>
 <p>Impressão Digital</p>	 <p>Sacos Encolhíveis</p>	 <p>Preformas PET</p>	 <p>Sopro PET/PE</p>
 <p>Tampas</p>	 <p>R-PET</p>	 <p>Escaneie o QR-code e saiba mais sobre as soluções.</p>	

Valgroup: presente no agora, criando soluções que transformam o futuro!

Há mais de 45 anos no mercado, a Valgroup se tornou referência na produção, transformação e reciclagem de plástico, com operações em sete países e mais de sete mil colaboradores em 41 plantas produtivas e sete plantas logísticas. Uma empresa consolidada, com o propósito de elevar a qualidade de vida da sociedade por meio de soluções inovadoras e sustentáveis em embalagens.

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PEÇAS QUE SURPREENDEM, QUALIDADE QUE CONQUISTA!

SEJA QUAL FOR SUA NECESSIDADE A FASTPLAS
AUTOMOTIVE TEM A TECNOLOGIA APROPRIADA:

Processos: Desde injeção de termoplásticos de engenharia com e sem carga, até o de compósitos tais como: SMC; RTM; RIM-PUR; RIM-DCPD E RRIM-PUR.

Estrutura: Engenharia de projeto e desenvolvimento, prototipagem, sala de medição CNC, laboratório físico-químico com simulador de testes e ensaios.

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ABOUT ABIPLAST



Did you know that ABIPLAST has been representing the plastic processing and recycling industries in Brazil for 58 years?

Founded in 1967, the association represents more than 14,000 companies throughout the country and is a reference in institutional defense, promotion of competitiveness, sustainability and innovation in the sector.

CONNECTING INDUSTRY, INNOVATION AND SUSTAINABILITY

ABIPLAST is the entity that represents and drives the Brazilian plastics processing and recycling industries, acting for almost six decades as a bridge between the sector, society and the challenges of the future.

We represent more than 14,600 companies throughout Brazil, responsible for moving the economy, generating more than 404,000 jobs, developing innovative solutions and promoting sustainability.

With national operations and strategic articulation with 21 state unions and partner entities, ABIPLAST is the unified voice of an industry essential for the country's development.

ABIPLAST's mission is clear and continuous: to represent, strengthen and transform the plastics processing and recycling sector in Brazil, guiding the industry towards a more innovative, competitive and sustainable present and future.



Learn more
about us in our
institutional
video

Much more than representation: we are movement, connection and transformation

- **We strengthen the sector:** we defend the interests of the plastics production chain through technical and institutional dialogue with public authorities, press and society.
- **We drive circularity and recycling:** we act to strengthen the adoption of design for circularity and the use of recycled materials, integrate sustainable practices throughout the production chain and expand waste recovery.
- **We generate strategic intelligence:** we produce studies and monitor data and indicators that guide business decisions and public policies.
- **We connect the sector:** we articulate partnerships, promote associativism and we unite companies around common and relevant goals.

Our performance goes beyond the industry:

- We support national competitiveness with actions that strengthen productivity, innovation and modernization of the sector.
- We boost Brazil's growth with an industry that employs, transforms and connects different areas of the economy.
- We think about tomorrow, with solutions that balance development, responsibility and commitment to future generations.





THE PRESIDENT'S WORDS

The Brazilian plastic industry is one of the pillars of national productivity. Present in virtually all sectors, from health to agribusiness, from construction to the automotive sector, plastic has become synonymous with efficiency, innovation and accessibility.

In 2025, the sector has more than 14,600 companies and employs about 404,000 professionals, leading among the five largest industrial segments with the best average salaries. This number of employees is more than double the number registered in the early 2000s.

José Ricardo Roriz Coelho

President of the board of ABIPLAST

This economic strength is accompanied by a history marked by profound transformations. In April 2025, ABIPLAST – Associação Brasileira da Indústria do Plástico celebrated 58 years of operation, reaffirming its commitment to innovation, sustainability and competitiveness of the sector. Created in 1967 by 16 visionary entrepreneurs, the entity has consolidated itself as the main spokesperson for the industry, articulating interests and promoting policies that boost the entire plastic production chain.

In the last 25 years, three major movements have redefined the industry. The first was the concentration of raw material supply, a scenario that posed additional challenges. If before Brazil had several suppliers, today the petrochemical chain is highly concentrated, with high trade barriers, including the highest import rates in the world and anti-dumpings that, in some cases, have been perpetuated for more than three decades. This framework directly impacts costs, reduces predictability and compromises the competitiveness of manufacturing companies.

The second movement was the consolidation of recycling as a strategic and value-added activity. Previously seen only as an alternative to reduce costs, recycling gained prominence in the innovation, sustainability and circular economy agenda. Today, Brazil is a reference in initiatives that promote traceability and circularity certification, such as the Recircula Brasil program,

launched by ABIPLAST, which leads a series of initiatives aimed at responsible waste management such as CNRPLAS – Câmara Nacional dos Recicladores de Materiais Plásticos (National Chamber of Plastic Material Recyclers), created to represent the recycling industries and promote the appreciation of recycling in the country.

Another milestone is the Rede pela Circularidade do Plástico, which completed seven years in 2025, bringing together more than 60 organizations to foster integrated solutions. Initiatives such as Retorna 2.0 platform, Circularize and CirculaFlex have strengthened reverse logistics, material standardization and integration between cooperatives and recyclers. The Movimento Plástico Transforma, on the other hand, works to raise awareness among the population about the responsible use of plastic, promoting joint efforts, educational actions and projects at sporting events, with concrete results in recycling and reuse of waste.

The third vector is technological evolution. Industry 4.0, digitization, automation and the Internet of Things (IoT) are already part of the factories' daily lives. Connected machines, remote process control, integrated software and 3D printing have transformed operations, increasing productivity and reducing costs. Packaging has also evolved: today it is more intelligent, functional and sustainable, incorporating technologies such as sensors and indicator seals.



Projections and investments: an expanding sector

The 4th edition of Plástico Brasil, the largest fair of solutions for the plastic industry in Latin America, held this year was marked by the presence of companies in the sector and national and international exhibitors. With more than 60,000 visitors and 1,000 exhibitors, the event, an initiative of ABIPLAST and the Associação Brasileira da Indústria de Máquinas e Equipamentos (ABIMAQ) , reinforced its role by presenting innovative initiatives that integrate technology, sustainability and circular economy.

The plastics industry is expected to invest BRL 31.7 billion between 2025 and 2027, with a focus on factory expansion, the development of sustainable packaging, new mechanical and chemical recycling technologies and the strengthening of reverse logistics. The recycling capacity of plastic waste is expected to grow 36% by 2026, consolidating the circular economy as one of the strategic pillars of the sector.

The multiplier effect is significant: for every real invested in raw materials, the sector transforms this input into products up to ten times more valuable, boosting innovation, exports and competitiveness.

The future: competitiveness, innovation and socio-environmental commitment

The plastic sector is strategic for Brazil. It generates jobs, moves the economy and contributes to sustainable development, but it needs to be aligned with global transformations. The restructuring of petrochemicals, investment in technology, the valorization of the circular economy and the promotion of long-term industrial policies are fundamental to consolidate a more competitive Brazil, prepared to lead the innovation and sustainability agenda.

Structural challenges: the urgency of petrochemical restructuring

Despite the advances, Brazil faces a critical challenge: the need to restructure the national petrochemical sector. While the entire world is reorganizing to gain competitiveness, our country suffers from decades of lack of investments in petrochemicals, added to the high cost of raw materials and the lack of regulatory predictability. This combination weakens the manufacturing industry and threatens Brazil's insertion in global value chains.

To overcome these obstacles, it is essential to ensure isonomic conditions of competition, reduce barriers, encourage innovation and implement robust industrial policies that stimulate productivity. Measures such as Nova Indústria Brasil (NIB - New Industry Brazil) and accelerated depreciation are important steps, but they need to be effective for the national industry to become competitive.



Plásticos que constroem com inovação e qualidade um futuro sustentável

REUSO DA ÁGUA NO PROCESSO PRODUTIVO

CONSUMO DE ENERGIA ELÉTRICA DE FONTES RENOVÁVEIS

LINHAS DE PRODUTOS ECO-FRIENDLY

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ALREADY KNOW ABIPLAST?

ABIPLAST acts in the competitiveness of the plastic processing and recycling industries in Brazil.



Access to competitive raw materials and trade defense

Search for integration and strengthening of the Brazilian production chain with the national and international market, aiming at new suppliers and/or partners in favor of competitiveness and innovation.



Market Access and Development

With an eye on the Circular Economy, innovation and industry 4.0, ABIPLAST follows Brazilian and international trends and opportunities for companies in the sector to always be in line with current discussions. In addition, it also monitors financing lines that allow companies to invest.



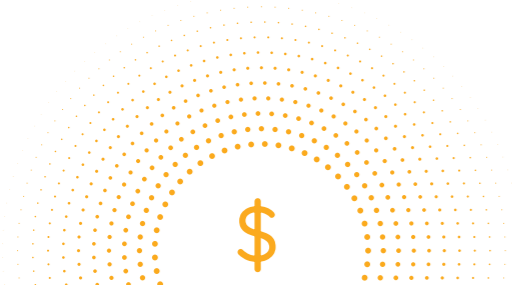
Labor Advisory

In partnership with SINDIPLAST-SP, the Association monitors the Collective Negotiations that take place annually, in addition to advising in the labor and union areas, guiding companies and contributing to a healthy relationship between Capital and Labor.



Project Management and Solution Development

ABIPLAST believes that collaboration and the union of players allow the execution of projects with great results for the sector. Thus, it has a qualified team available to manage projects for companies in the sector.



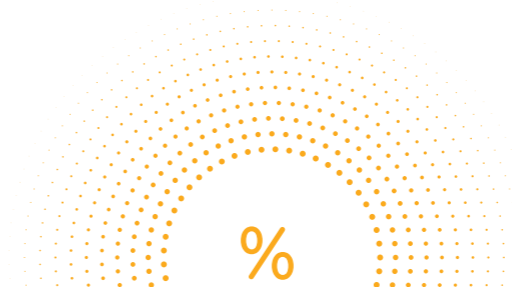
Economic Advisory and Market Intelligence

Monitoring of the sector and its competitiveness through research and monitoring of data from Brazil and international references, allowing the preparation of materials that subsidize companies in the sector, identifying challenges and opportunities.



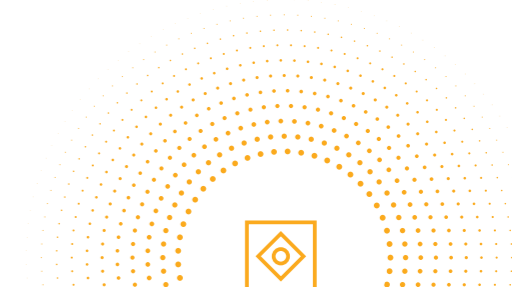
Technical Advisory

Monitoring of regulations, technical standards, ordinances and laws in force regarding plastic products in order to ensure that they are updated with the reality of basic industrial technologies and technological infrastructure of the sector, as well as advice for implementation in companies.



Tax Claims

ABIPLAST believes in the importance of tax equality in the industrial sector in relation to other sectors of the economy, in addition to working with the current tax logic to contemplate the dynamics of the circularity of new business models.



Institutional and Governmental Relations

With the objective of uniting actors and building collectively, ABIPLAST works at the institutional and governmental levels to strengthen the plastic processing and recycling industries.





SUSTAINABILITY IN MOTION: INITIATIVES THAT TRANSFORM

ABIPLAST acts strategically to drive sustainability throughout the plastic chain. More than following trends, we promote a continuous movement of transformation, with actions that connect innovation, responsibility and positive impact.

With concrete initiatives, we foster the circular economy, encourage recycling, value recycled raw materials and strengthen environmental education. We work in an integrated way with companies, regional unions, associations, governments and society, always with the purpose of transforming challenges into sustainable solutions.

→ Get to know our initiatives!

CIRCULAR ECONOMY



Traceability and proof of circularity with international recognition

Recircula Brasil is a pioneering digital platform that allows the industry to prove, based on auditable data, the circularity of plastic waste, from its origin to its reintegration as recycled raw material in the production process.

By integrating technology, traceability and transparent information management, the initiative strengthens the appreciation of recycled materials, promotes compliance with sustainability policies and stimulates the competitiveness of the national industry.

Recognized by the United Nations (UN) as an innovative model to encourage the circular economy, the platform was developed by ABIPLAST in partnership with ABDI.

Seals that communicate credibility



Recycled Content Seal: indicates the percentage of recycled plastic present in the products.



Traceability Seal: guarantees the market that companies track, through the Recircula Brasil Platform, the origin and destination of plastic materials, such as waste or resin with recycled content and the destination of these materials.

Both are validated by independent audits, ensuring the veracity of information and inhibiting greenwashing practices.

➔ Learn more: www.reciculabrasil.com.br





Rede Pela Circularidade do Plástico

Sectoral cooperation for circularity

Mobilized by ABIPLAST, the Rede pela Circularidade do Plástico – Rede (Network for Plastic Circularity) is a space for cooperation that connects more than 60 organizations in the plastic value chain - from the petrochemical industry to recycling - with the purpose of promoting viable solutions for the circularity of plastic packaging.

The initiative drives innovation, the sharing of good practices and the development of tools that contribute to the advancement of the circular economy, recycling and sustainability in the sector. Among the most important are:

- Tool for assessing the recyclability of plastic packaging
- Guides for rigid and flexible packaging design
- Guides to assist in the identification and recovery of plastic waste
- Local projects with actions in Guarujá, Praia Grande and Bertioga, which already total more than 170 tons of recycled plastic, focusing on cooperative training, public policies and environmental education

The Rede reinforces that the circularity of plastic depends on concrete, articulated and innovative actions, capable of transforming challenges into opportunities and accelerating the transition to a more circular and sustainable model.

➔ Learn more: www.redeplastico.com.br



RETORNA

With over 1,200 analyses conducted and 300 registered users, including companies, designers, engineers, and environmental technicians, the free platform RETORNA evaluates the Recyclability Index of Plastic Packaging within the Brazilian context.

By considering both technical criteria (materials, design, additives, labels, caps) and market aspects (collection, sorting, and recycling infrastructure), the tool supports strategic decision-making and encourages the development of packaging increasingly aligned with circularity principles.

➔ Learn more: <https://www.redeplastico.com.br/retorna-projeto>



CIRCULARIZE

More than technology: a portal that drives the appreciation of work and recycled materials

Circularize connects cooperatives and recycling industries, strengthening traceability and delivering higher-quality plastic waste. The portal offers technical guides, best practices, and educational videos in accessible language, promoting process efficiency and adding value to recycled materials.

➔ Learn more: <https://circularize.redeplastico.com.br>



RECICLA CIDADE

The initiative has already recovered more than 180 tons of plastic in coastal cities of São Paulo State, such as Guarujá, Praia Grande, Bertioga, and São Vicente. More than just collection, it leaves behind a legacy of municipal laws and decrees that ensure its continuity as a public policy.

With a focus on environmental education and social engagement, the project mobilizes the population through gamification and eco-exchanges, connecting public authorities, companies, and citizens in a replicable model for other Brazilian cities.



REVERSE PACKAGING LOGISTICS



Collective commitment to reverse logistics

ABIPLAST is part of Coalizão Embalagens, a group formed by sectoral associations that act in an articulated manner to enable the Reverse Packaging Logistics System, provided for in the Packaging Sector Agreement in General, in accordance with the National Solid Waste Policy (PNRS).

Since 2015, Coalizão has promoted structuring actions throughout the country with the objective of increasing post-consumer packaging recycling rates, strengthening the recycling chain and expanding the socioeconomic inclusion of cooperatives and operators.

In 2024, the program achieved significant results:

- 462 supported entities — 395 waste picker cooperatives, 47 networks and 20 private operators
- Presence in 348 municipalities, covering all States and the Federal District
- 1,557 structuring actions carried out, with 1,489 of them aimed exclusively at cooperatives
- 18 environmental education projects and initiatives, with thousands of people impacted
- More than 243 thousand tons of recyclable materials recovered, which represents 37.58% of the established target
- Total investment of BRL 47.7 million invested in structuring actions throughout the year

Coalizão Embalagens is an example of collective and effective commitment to waste management and the promotion of the circular economy in Brazil.

REVERSE PACKAGING LOGISTICS

Descarta Aí

Conscious disposal for civil construction



The recycling of construction waste also involves plastic. With this focus, ABIPLAST, in partnership with COFABI – Câmara Setorial dos Fabricantes de Baldes Industriais (Sectoral Chamber of Industrial Bucket Manufacturers), created Descarta Aí project, which offers a practical and environmentally suitable alternative for the disposal of post-consumer plastic buckets and their lids.

Aimed at consumers and self-employed construction professionals, the project seeks to expand the correct destination of this type of packaging, often neglected in traditional selective collection, thus promoting the appreciation of recyclable material and the circular economy in the construction sector.

Descarta Aí represents an important step in strengthening sectoral solutions for the management of plastic waste in Brazil.

Isopor® Amigo

Awareness for EPS recycling



Isopor® Amigo is an initiative of ABIPLAST, in partnership with several actors in the chain, which promotes awareness of the recycling of EPS/XPS (popularly known as Isopor®) and encourages the correct disposal of trays, boxes, lunch boxes and other packaging made with this material.

With a focus on environmental education and reverse logistics, the program demonstrates that Isopor® can and should be recycled, as long as it is correctly separated and destined. The initiative includes actions such as training, technical visits and educational activities, which bring the population and professionals closer to the theme and broaden the understanding of the recycling potential of this type of plastic. Since its inception at the Perini Business Park in Joinville (SC), the project has recycled 6.2 tons of material, equivalent to about 535,000 lunch boxes, raising the waste quality index from 23% to 98% at voluntary delivery points.

Isopor® Amigo reinforces ABIPLAST's commitment to valuing all types of plastics and strengthening the circular economy in Brazil.



GOOD PRACTICES AND CERTIFICATIONS

Programa *Pellet Zero*

The Pellet Zero Program – OCS® is a nationwide initiative that aims to reduce plastic pellet losses along the production chain, from processing and recycling plants to logistics operations. ABIPLAST has been a licensor of the Operation Clean Sweep® program – USA since 2014.

With continuous actions and progressive goals, the program promotes good industrial practices, contributing to the prevention of environmental pollution.

There are 27 companies with 46 units certified by ABIPLAST. 4 units are certified with the 5th star PPZ OCS Blue®, of which one was recertified in 2024 and another 2 will enter the recertification process in 2025.

ABIPLAST works to disseminate and update implementation manuals adapted to Brazil, reinforcing the sector's commitment to sustainable practices and combating the dispersion of pellets in the environment.

SENAPLAS

Certification that values quality recycling

SENAPLAS – Selo Nacional de Plásticos Recicladados (National Seal of Recycled Plastics), created to value recycling companies and certify the quality of post-consumer recycled plastic resin in Brazil.



Certification is divided into two complementary steps:

- **SENAPLAS – Company:** recognizes recyclers who act according to social, environmental and economic criteria required by Brazilian legislation;
- **SENAPLAS – Product:** certifies the quality of the recycled resin, based on the European EuCertPlast® certification methodology, increasing its reliability and competitiveness in the market.

More than 40 recycling companies have already been certified, strengthening the professionalization of the sector and boosting the traceability and valorization of recycled plastic. As a result of the partnership between ABIPLAST and CNRPLAS – National Chamber of Plastic Recyclers, SENAPLAS effectively contributes to the circular economy in Brazil.

➔ Learn more: <https://cnrplas.abiplast.org.br>

ENVIRONMENTAL EDUCATION



Movimento Plástico Transforma: education, innovation and circularity



With strong communication aimed at society, the Movimento Plástico Transforma reinforces that plastic, when used responsibly, is an essential part of the solution to environmental and social challenges.

Focusing on environmental education, innovation and circular economy, the movement carries out actions of great impact, such as:

- Efforts to clean and reuse plastic waste
- Recycling and transformation of street racing cups into new products
- Immersive and educational experiences in museums and sector fairs

In addition to face-to-face activations, the Movement maintains an active presence on social networks, bringing qualified information about plastic to thousands of people throughout Brazil, expanding knowledge and combating myths about the material.

Through interactive content, creative activations and community projects, the Movement inspires a new relationship between society and plastic, promoting the valorization of the material and conscious consumption.

➔ Learn more: www.plasticotransforma.com.br





ENVIRONMENTAL EDUCATION

separe. não pare.

Awareness that transforms attitudes

The Separe. Não pare. (Sort. Don't Stop.) is a movement of Coalizão Embalagens, which brings together business associations that are signatories to the Packaging Sector Agreement in General, with the objective of raising awareness and mobilizing the population about the separation and correct disposal of domestic waste, especially post-consumer packaging.

Developed as part of the environmental education and shared responsibility agenda, the campaign uses social networks and digital content to guide in a simple and accessible way how to separate recyclable packaging, indicate voluntary delivery points (PEVs) and clarify doubts about the correct destination. The profiles of the campaign on the networks already add more than 40 thousand followers, expanding the reach of the message and the engagement of society with the circular economy.

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depende das suas
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escolha **transformadora**
para um **futuro sustentável.**



Saiba mais sobre nosso
compromisso com a sustentabilidade!





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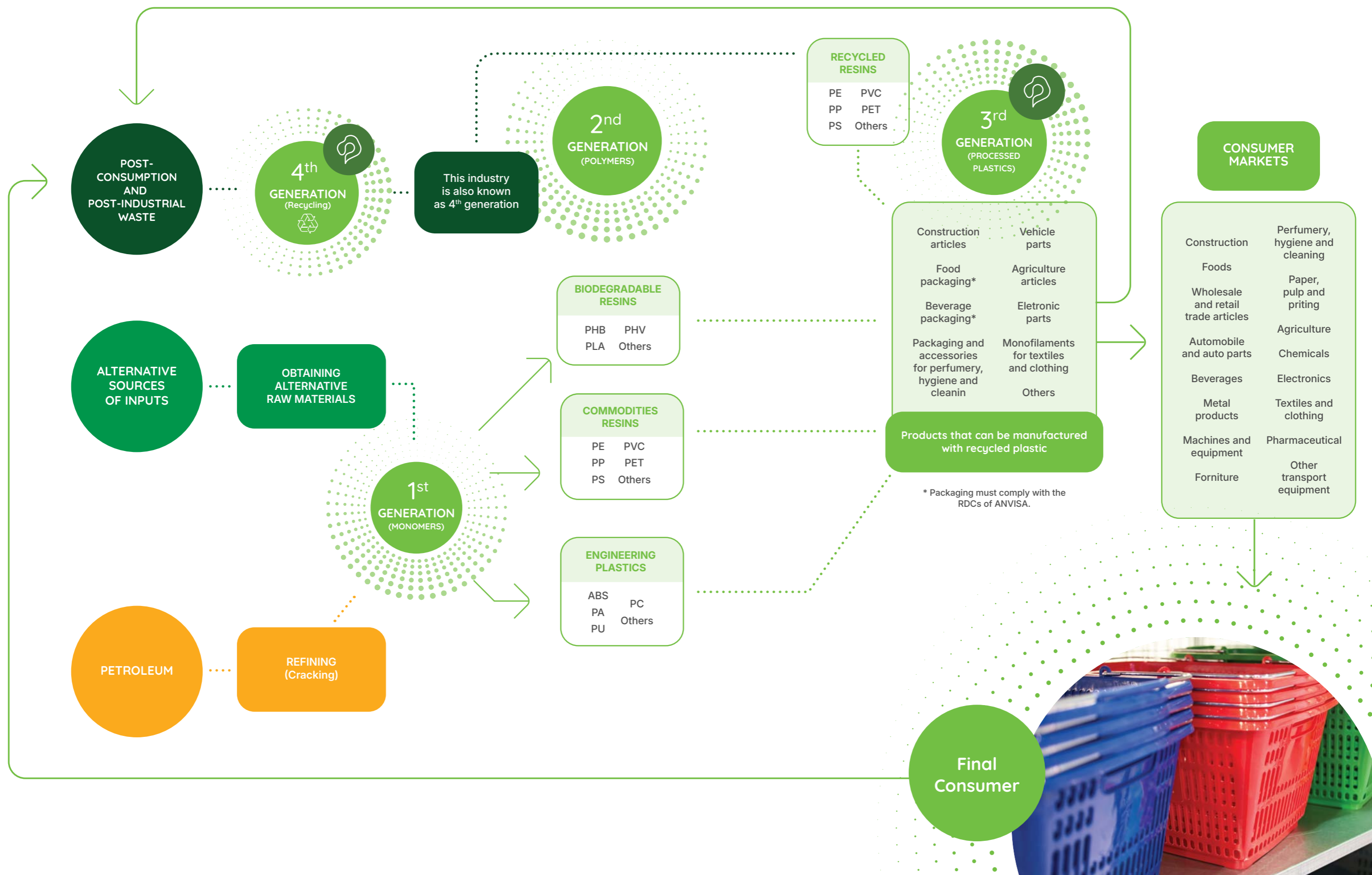
THE PRODUCTIVE CHAIN OF PLASTIC



Did you know that the plastic chain is circular and integrates all stages, from production to recycling?

It begins with the manufacture of resins, goes through the transformation into products, for responsible consumption and disposal, and continues with recycling and the reintroduction of recycled material in new production cycles. It is a system based on innovation, technology and the logic of the circular economy. From monomer to polymer, from transformation to revaluation, the cycle of plastic involves technology, innovation and circular economy.

THE PRODUCTIVE CHAIN OF PLASTIC IN BRAZIL





PLASTIC IN THE WORLD

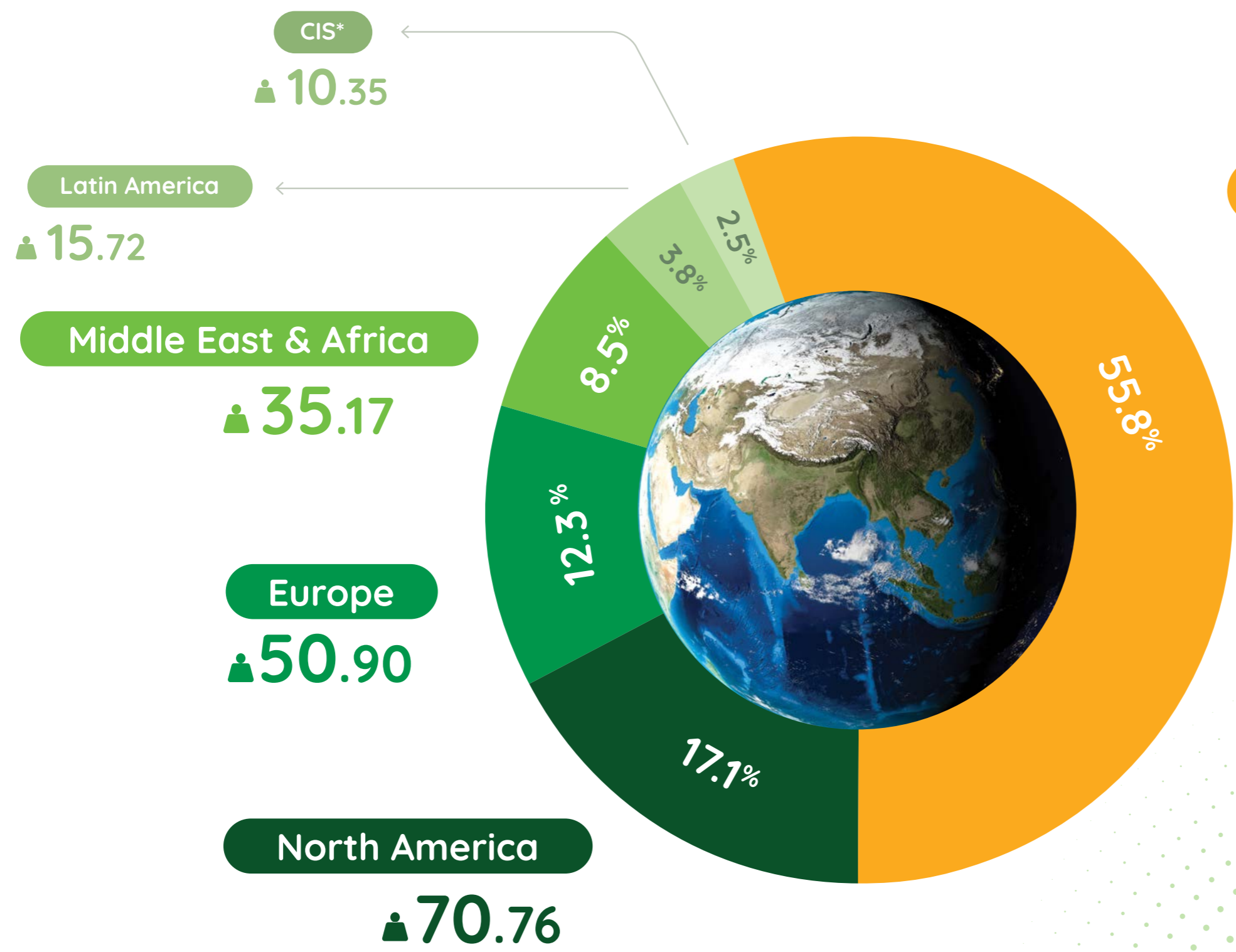


Did you know that in many applications, plastic has less environmental impact than alternative materials?

Lightweight, durable and recyclable, plastic contributes to the reduction of CO² emissions, the efficient use of natural resources and waste reduction, when inserted in a circular and well-managed chain.

GLOBAL PLASTIC PRODUCTION

Volume (thousand tons)



Asia

230.90

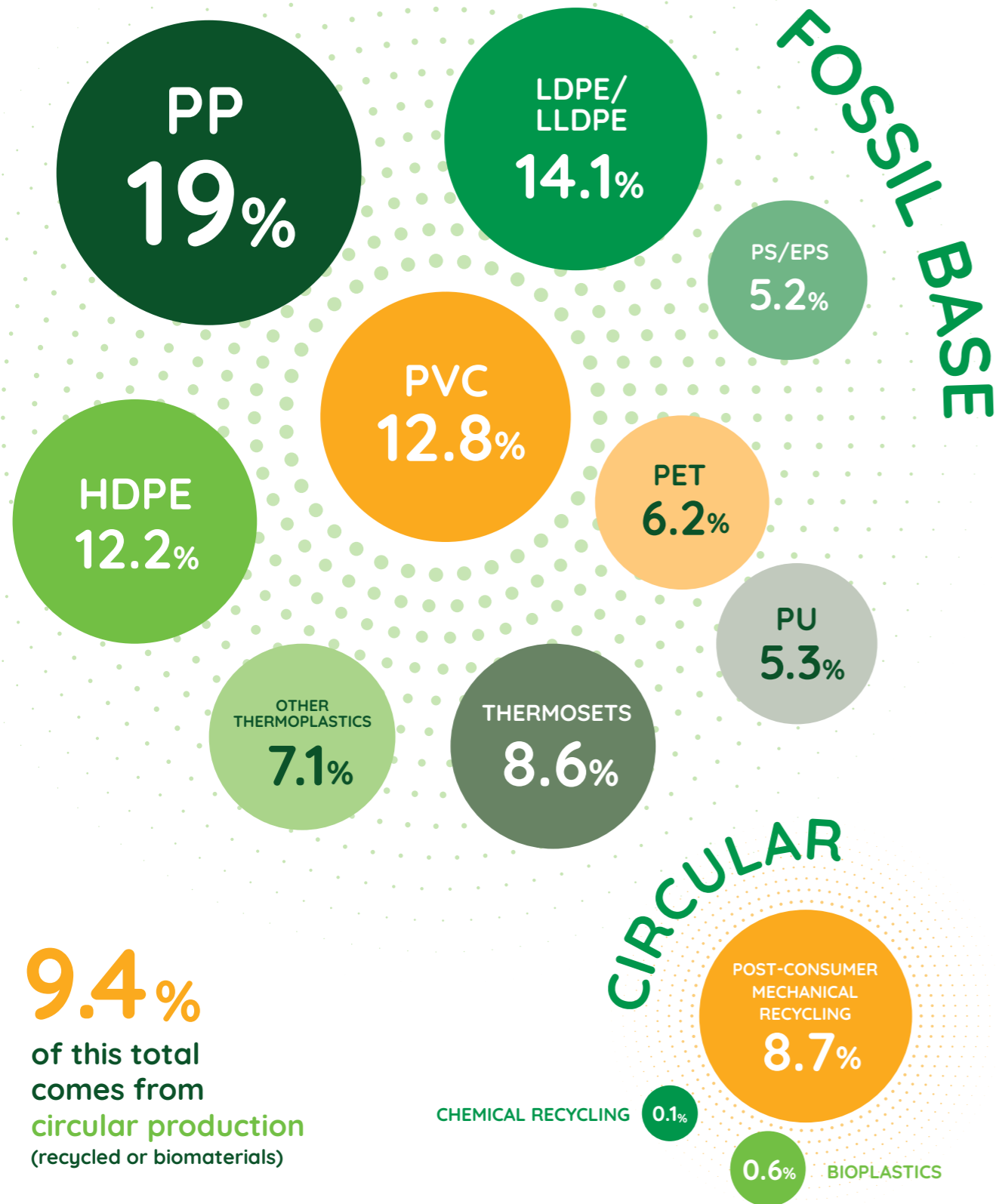
+ More than **half** of the plastic produced globally is transformed in Asia

413.8
million of tons plastic production

* Commonwealth of Independent States (CIS): Azerbaijan, Armenia, Belarus, Kazakhstan, Kyrgyzstan, Moldova, Russia, Tajikistan, Turkmenistan, Uzbekistan, and Ukraine.

Source: Plastics Europe - Plastics the fast facts 2024

GLOBAL PRODUCTION BY RESIN TYPE



Segmentos de interior, exterior e compartimento do motor de veículos automotores

Carregando...

76 %

RUMO AOS 100 ANOS!

Há 76 anos moldando qualidade e inovação no setor plástico



GLOBAL BIOPLASTICS PRODUCTION

Volume (thousand tons)

Latin America 204.99

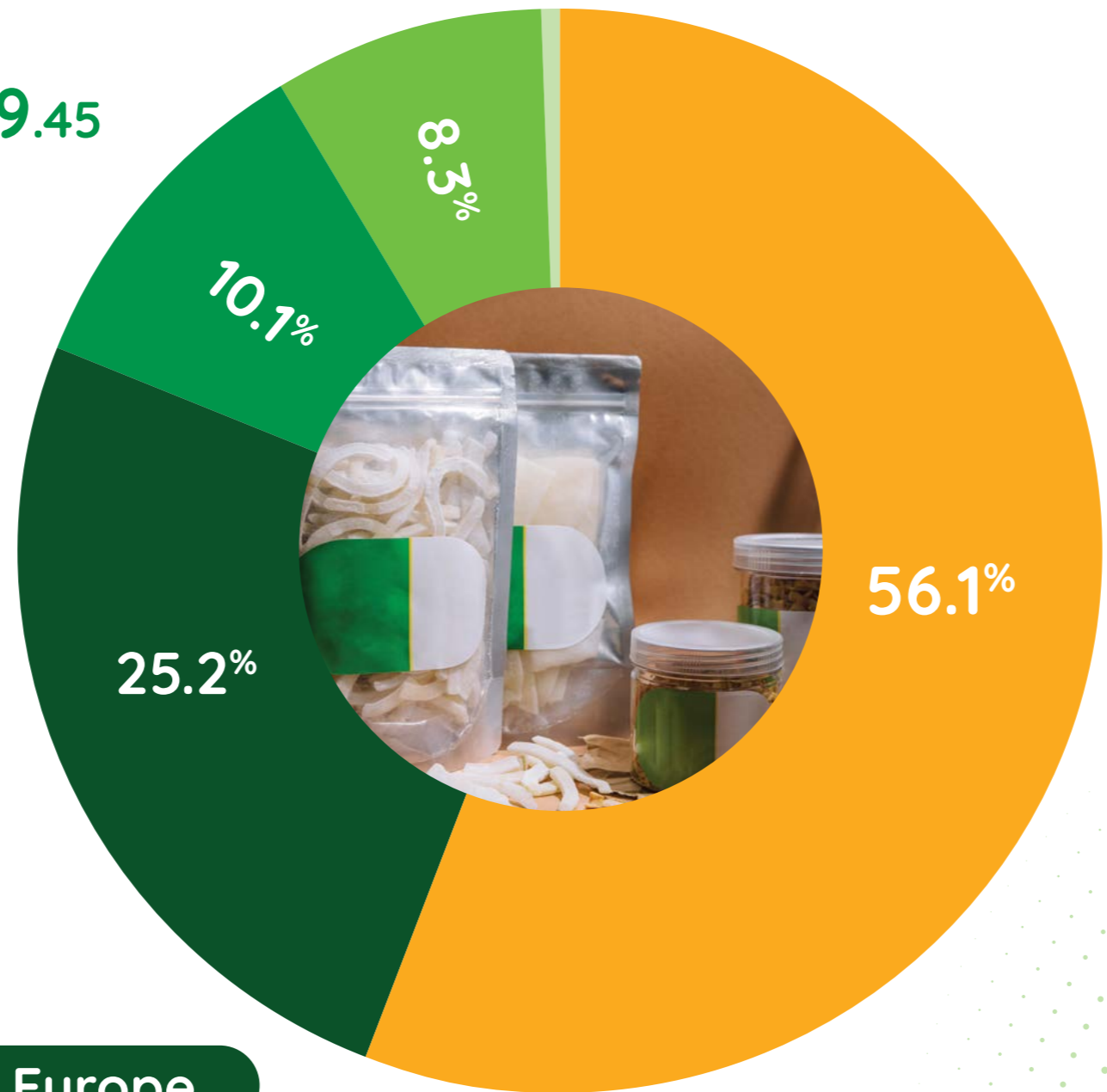
Middle East & Africa 7.41

North America 249.45

Asia (total)

1,385.56

852.08	China
439.62	Remaining Asia
93.85	Japan



Europe 622.39

ton

2.47
Millions of tons of plastic resins produced

Sources: Plastics Europe - Plastics the fast facts 2024 / European Bioplastics Market Development

0.6% of all plastic produced in the world is of bioplastic origin

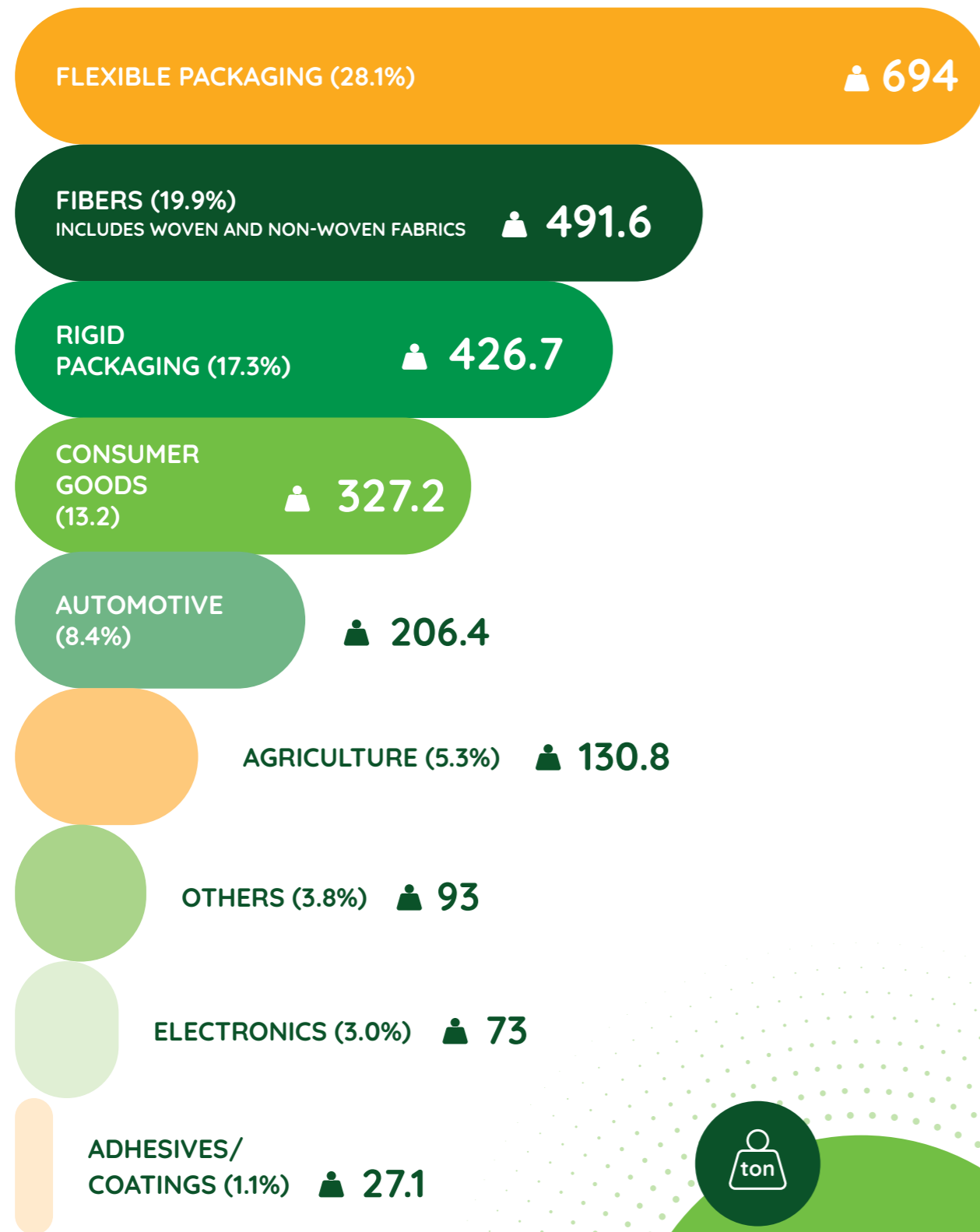
56% of global production of bioplastics is held in ASIA

43.7% are original plastics renewable, however non-biodegradable

56.1% are plastics biodegradable

MARKET FOR BIOPLASTICS

 Volume (thousand tons)



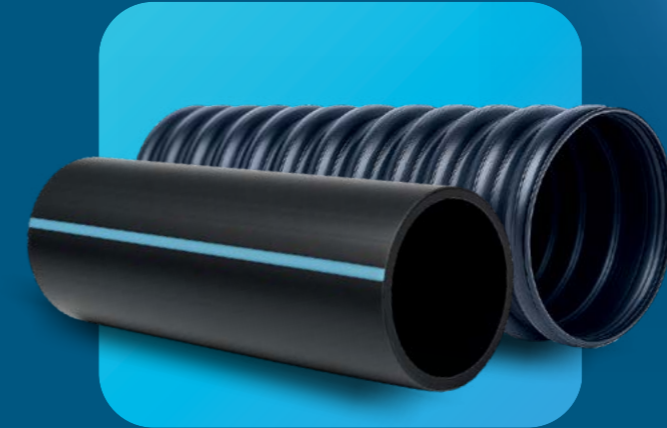
 **2.47**
million tons

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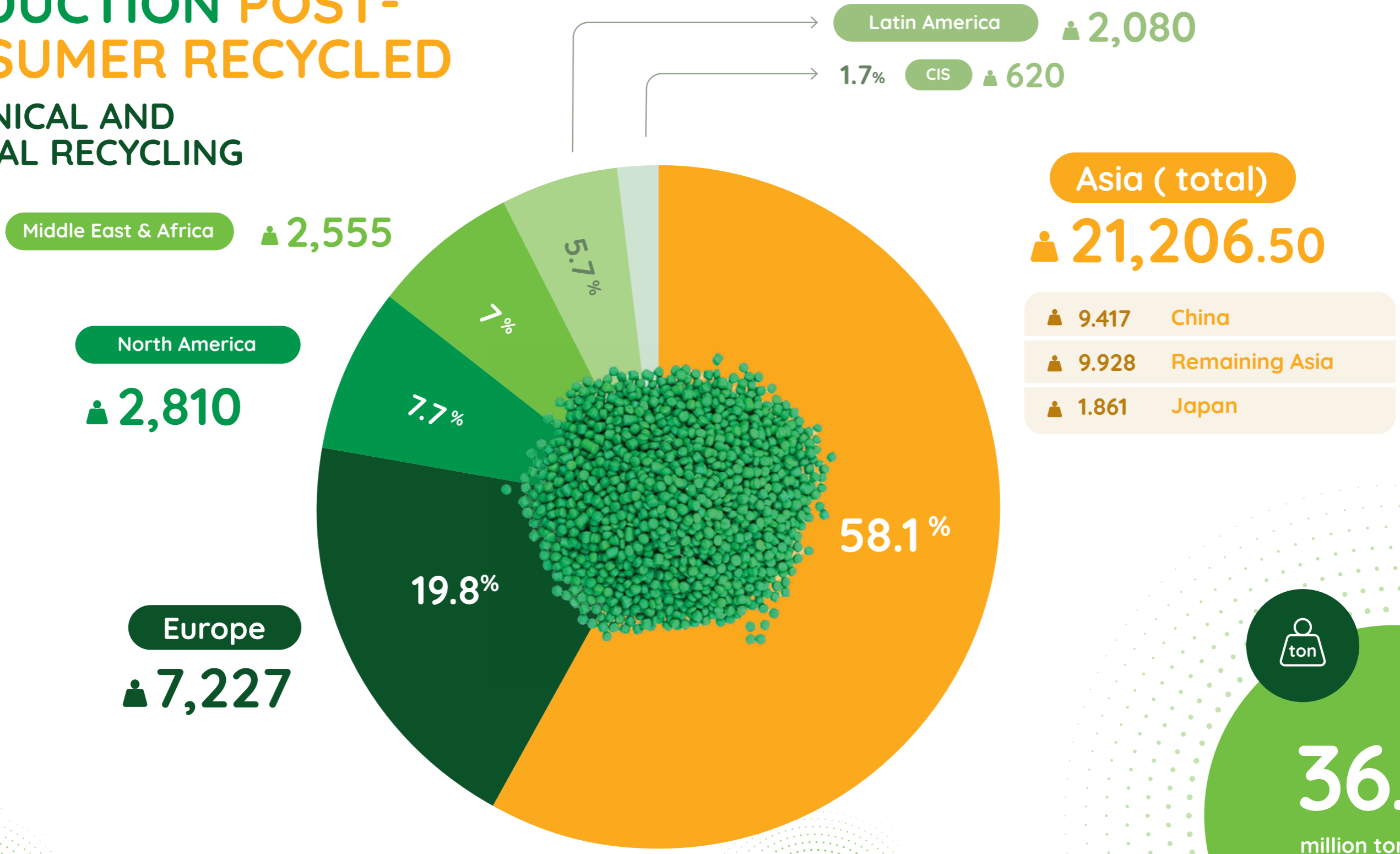
 [kanaflex_oficial](https://www.instagram.com/kanaflex_oficial)



GLOBAL PLASTICS PRODUCTION POST-CONSUMER RECYCLED

MECHANICAL AND CHEMICAL RECYCLING

Volume (mil toneladas)



Asia (total)
21,206.50

9,417	China
9,928	Remaining Asia
1,861	Japan

36.5
million tons of plastic resins produced

1%
of global post-consumer plastics recycling is represented by chemical recycling

92.6%
of the production of plastic materials "circular-based" come from recycling post-consumer waste mechanics

Source: Plastics Europe - Plastics the fast facts 2024



APPLICATIONS OF PLASTIC



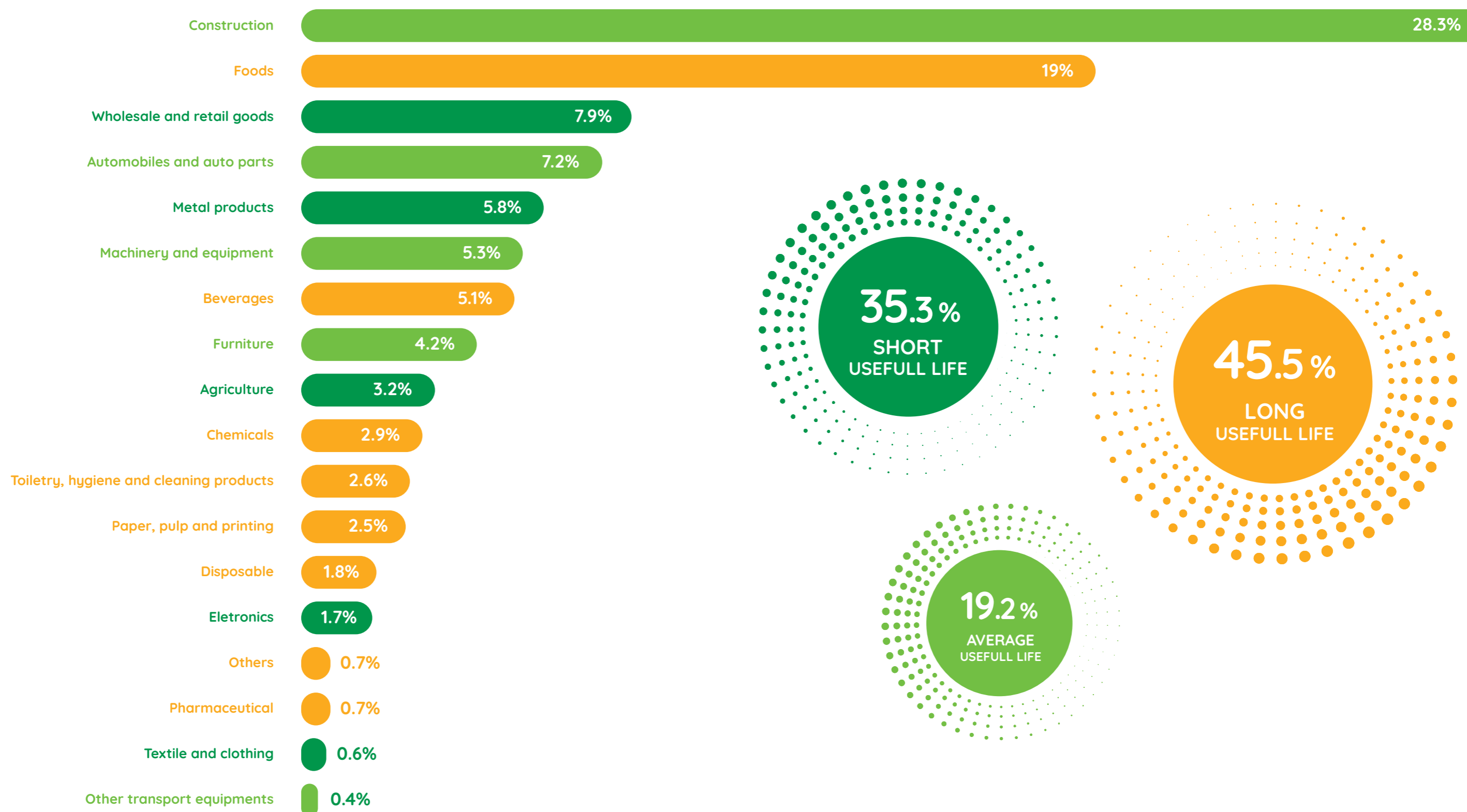
Did you know that plastic is in everything, as far as you don't see?

Electrical insulation, airbags, prostheses, filters, fiber optic cables and even money bills have high-performance plastic components.

CONSUMER SECTORS OF PROCESSED PLASTICS

(CONSUMPTION VALUE)

- The percentages for each application were changed as a result of the updating the criteria for defining the life cycles of plastic products. Additionally, the "Others" item was included.
- The item "Others" refers to the extraction of inputs.
- The percentage of "Disposables" is an approximation using data from production of cups, plates, cutlery and similar items and straws.

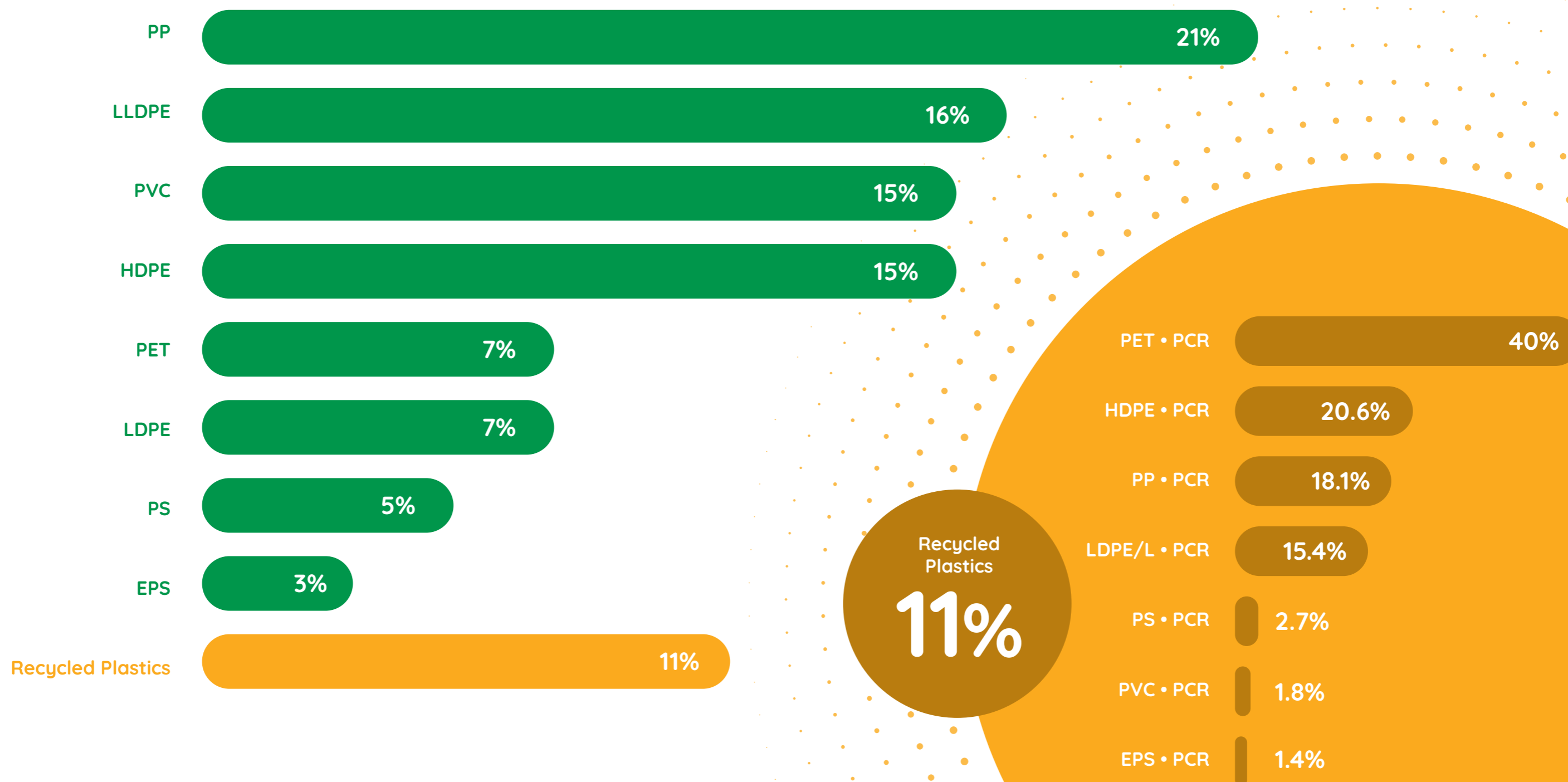


Sources: Tabela de Uso de Bens e Serviços 2022 e Pesquisa Industrial Anual 2023 - Produto/ IBGE - Prepared by: ABIPLAST.



MAIN RESINS CONSUMED IN BRAZIL (2024)

- Main resins consumed in Brazil (2024)
- Production of post-consumer recycled plastic resin (2024)



PRODUCTIVE PROCESSES FOR MANUFACTURING PROCESSED PLASTICS (2022)

61%
EXTRUSION

25%
INJECTION

VACUUM
THERMOFORMING

7%

FOAM
PRODUCTION

4%

ROTO
MOLDING

2%

EXTRUSION

It consists of forcing the controlled passage of molten plastic material through a cylinder, and at the exit, the material is compressed into a die with the desired shape of the product. By means of this process, for example, plates, profiles or films are manufactured for later finishing.

INJECTION

This process gives very specific details to products such as threads, holes and perfect fittings and is widely used in the auto parts industry (such as car dashboards) manufacturing intermediate products that serve as inputs for the automotive industry and also in the production of household utilities that are intended for the final consumer..

VACUUM THERMOFORMING

Process of molding parts from laminates or sheets (obtained by extrusion). It consists of heating the plate, which is subjected to a vacuum that eliminates the air between the plate and the mold, allowing the formation of the final part. With this technique, products such as disposable utensils, trays, auto parts, etc., are manufactured.

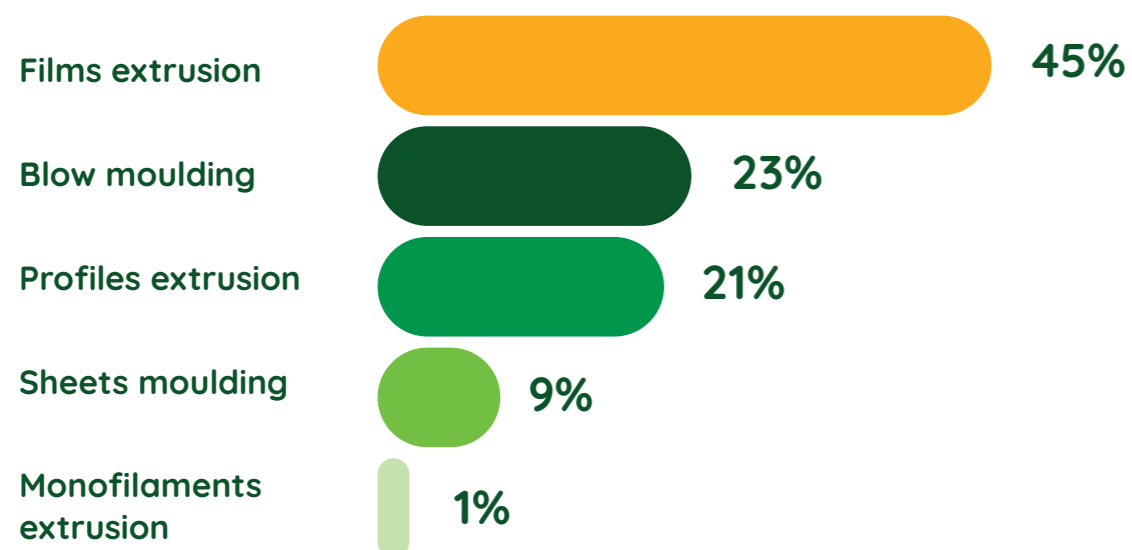
OTHER PROCESSES

A widely used variation for the manufacture of pet bottles is the blow injection, which combines in the same machine the two injection processes (preform) and blow (vial or bottle).

ROTO MOLDING

Used for the manufacture of hollow products such as toy parts (heads and parts of dolls) or large parts such as tanks for agricultural machines and water tanks.

EXTRUSION TYPES



Film Extrusion

It produces films, very thin films, mono and multilayer that will be used for later making flexible packaging.

Blow Extrusion

It consists of the extrusion of a "hose" commonly called a parison that is inserted into a mold and with the injection of compressed air inside it forms a hollow product. It is the process used in the manufacture of vials, jars, food bottles, cosmetics, cleaning products and automotive tanks.

Profile Extrusion

Used for the manufacture of pipes, coated cables, wires and hoses for civil construction.

Sheet Extrusion

Used for the manufacture of plates and blades that will be inputs for the production of thermoformed packaging and white line accessories, such as refrigerators and microwaves.

Monofilament Extrusion

For the manufacture of continuous and fine filaments, such as fishing lines, bristles for brushes and brooms and when woven they originate products such as ropes, cables, fishing nets, screens in general, etc. There is also the manufacture of fibers for the textile industry.

NASCEMOS PARA OFERECER SOLUÇÕES



Desenvolvimento contínuo da indústria de transformação do plástico no Brasil

Há mais de meio século, a Sansuy vem sendo reconhecida pela qualidade de seus produtos e compromisso responsável com a transformação do plástico em soluções sustentáveis. Pensando desde processos produtivos eficientes, uso consciente da energia até o reaproveitamento de materiais e resíduos. Mais do que criar produtos, a Sansuy cria soluções que conectam a indústria, a sociedade e o compromisso com o futuro.



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THE PROCESSED PLASTICS INDUSTRY IN BRAZIL



Did you know that the Brazilian plastic processing industry serves virtually all productive sectors in the country?

With a presence in segments such as packaging, civil construction, automotive, agribusiness and health, the sector is one of the most diversified in the economy and plays an essential role in adding value to the chain.

OVERVIEW THE PROCESSED PLASTICS INDUSTRY IN BRAZIL

12.9
thousand
Companies

387.9
thousand
Jobs

4th

largest employer
sector in processing
industry Brazilian

R\$ 164.8
billion in
revenue

8.14
million tons
of plastic products
consumed in Brazil

7.46
million tons
of plastic products
made in Brazil

Moldamos um futuro sustentável por meio da transformação inovadora em plástico e além do plástico.



LOCATION OF COMPANIES AND JOBS THE PROCESSED PLASTICS SECTOR IN BRAZIL (BY STATE)

TOTAL SECTOR

	Transformation + Recycling		Transformation		Recycling	
	Companies 2024	Empregados 2024	Companies 2024	Jobs 2024	Companies 2024	Jobs 2024
Acre	5	06	5	106	0	0
Alagoas	123	5,163	91	4,958	32	205
Amapá	1	28	1	28	0	0
Amazonas	192	13,041	175	12,921	17	120
Bahia	442	13,175	390	12,606	52	569
Ceará	366	5,945	308	5,214	58	731
Distrito Federal	71	652	60	538	11	114
Espírito Santo	138	3,617	112	3,279	26	338
Goiás	400	6,612	329	6,286	71	326
Maranhão	53	774	40	542	13	232
Mato Grosso	112	2,151	87	1,936	25	215
Mato Grosso do Sul	78	2,403	61	2,257	17	146
Minas Gerais	1,083	28,190	943	26,895	140	1,295
Paraná	1,260	31,592	1,066	29,482	194	2,110
Paraíba	155	4,079	125	3,737	30	342
Pará	80	1,468	61	1,269	19	199
Pernambuco	400	13,025	364	12,778	36	247
Piauí	43	411	38	402	5	9
Rio Grande do Norte	113	1,963	88	1,699	25	264
Rio Grande do Sul	1,435	31,876	1,316	31,117	119	759
Rio de Janeiro	605	14,559	536	13,587	69	972
Rondônia	31	263	25	239	6	24
Roraima	2	4	0	0	2	4
Santa Catarina	1,325	52,327	1,158	50,252	167	2,075
Sergipe	54	1,126	42	1,001	12	125
São Paulo	6,039	169,886	5,450	164,645	589	5,241
Tocantins	25	218	18	142	7	76
TOTAL	14,630	404,626	12,889	387,916	1,742	16,738

Source: RAIS e Novo CAGED 2024/ Ministério do Trabalho e Emprego



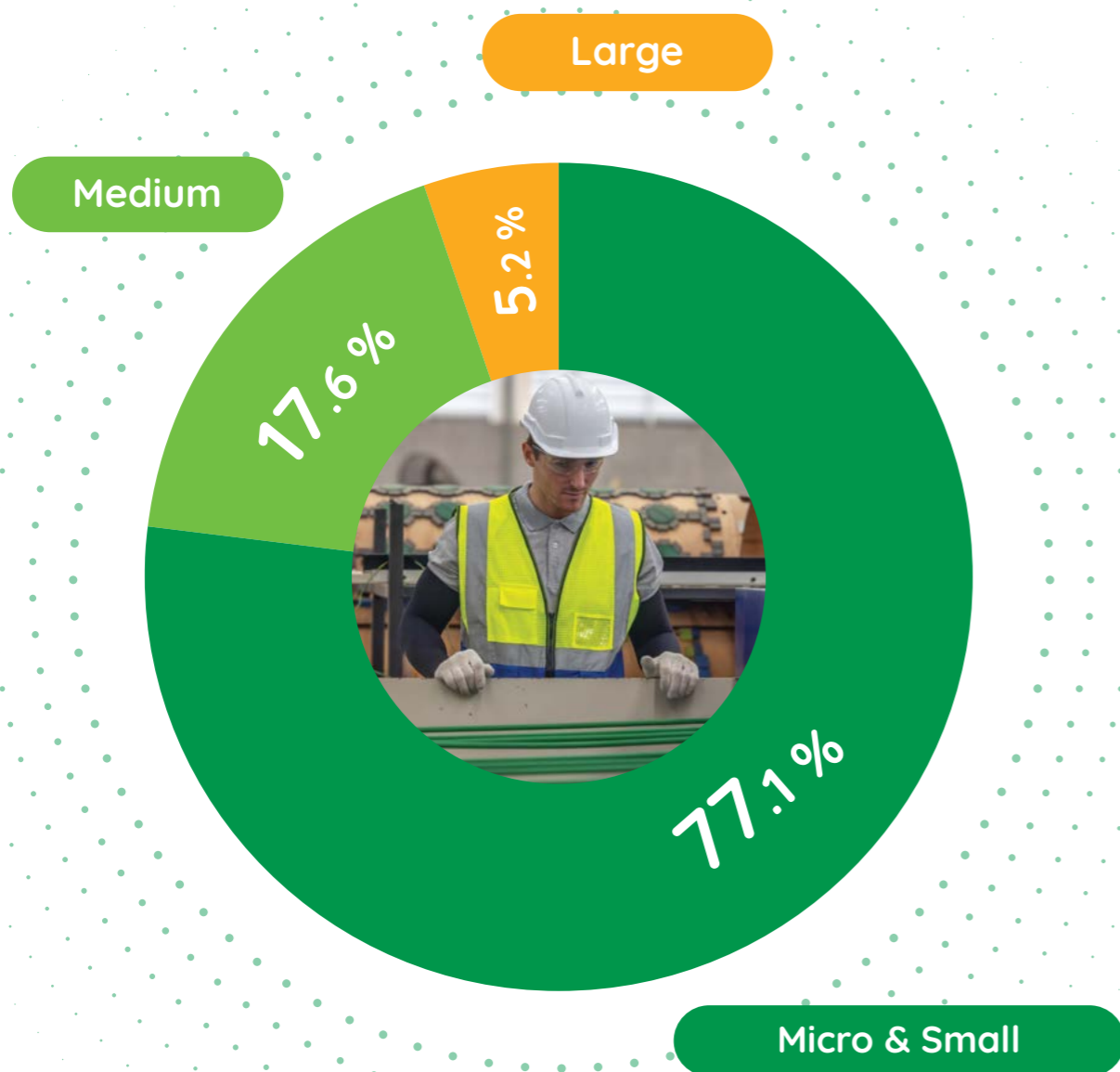
DISTRIBUTION OF COMPANIES AND JOBS

State	Companies	Brazil (%)
São Paulo	5,450	42.3
Rio Grande do Sul	1,316	10.2
Santa Catarina	1,158	9.0
Paraná	1,066	8.3
Minas Gerais	943	7.3
Rio de Janeiro	536	4.2
Bahia	390	3.0
Pernambuco	364	2.8
Goiás	329	2.6
Ceará	308	2.4
Amazonas	175	1.4
Paraíba	125	1.0
Espírito Santo	112	0.9
Alagoas	91	0.7
Rio Grande do Norte	88	0.7
Mato Grosso	87	0.7
Pará	61	0.5
Mato Grosso do Sul	61	0.5
Distrito Federal	60	0.5
Sergipe	42	0.3
Maranhão	40	0.3
Piauí	38	0.3
Rondônia	25	0.2
Tocantins	18	0.1
Acre	5	0.04
Amapá	1	0.01
TOTAL	12,889	100%

THE PROCESSED PLASTICS SECTOR IN BRAZIL (BY STATE)

State	Jobs	Brazil (%)
São Paulo	164,645	42,44
Santa Catarina	50,252	12,95
Rio Grande do Sul	31,117	8,02
Paraná	29,482	7,60
Minas Gerais	26,895	6,93
Rio de Janeiro	13,587	3,50
Amazonas	12,921	3,33
Pernambuco	12,778	3,29
Bahia	12,606	3,25
Goiás	6,286	1,62
Ceará	5,214	1,34
Alagoas	4,958	1,28
Paraíba	3,737	0,96
Espírito Santo	3,279	0,85
Mato Grosso do Sul	2,257	0,58
Mato Grosso	1,936	0,50
Rio Grande do Norte	1,699	0,44
Pará	1,269	0,33
Sergipe	1,001	0,26
Maranhão	542	0,14
Distrito Federal	538	0,14
Piauí	402	0,10
Rondônia	239	0,06
Tocantins	142	0,04
Acre	106	0,03
Amapá	28	0,01
TOTAL	387,916	100%

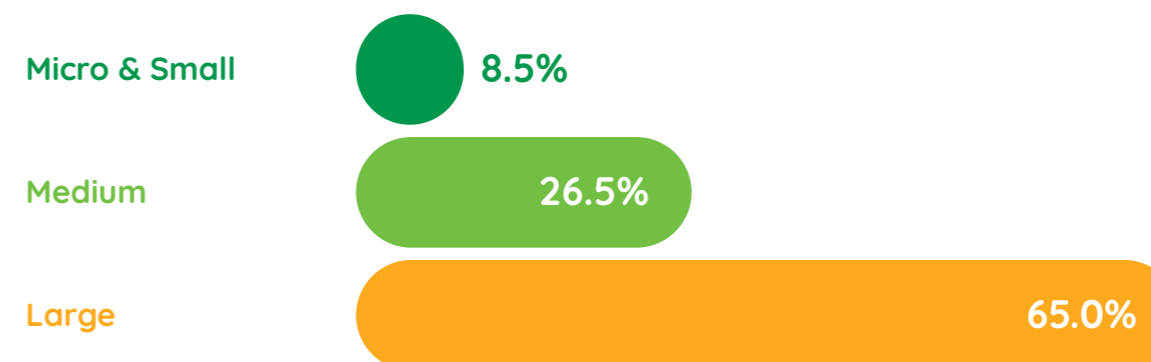
DISTRIBUTION OF COMPANIES BY REVENUES (2023)



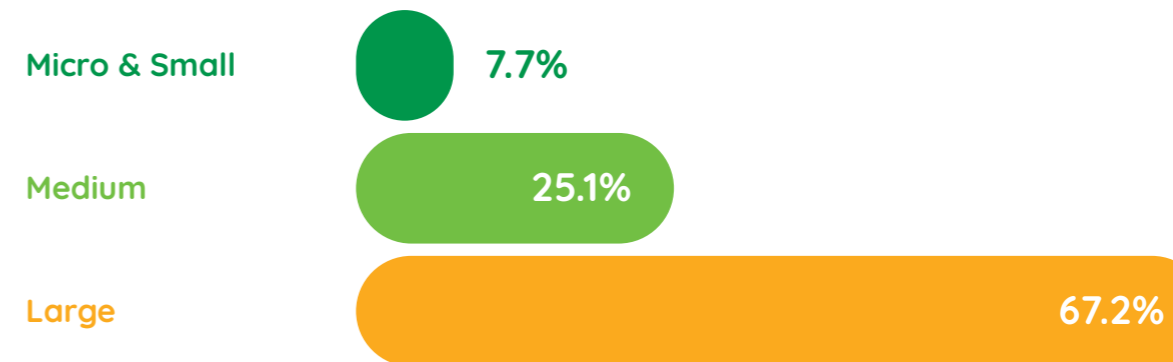
STAFF HIRED



VALUE OF INDUSTRIAL TRANSFORMATION

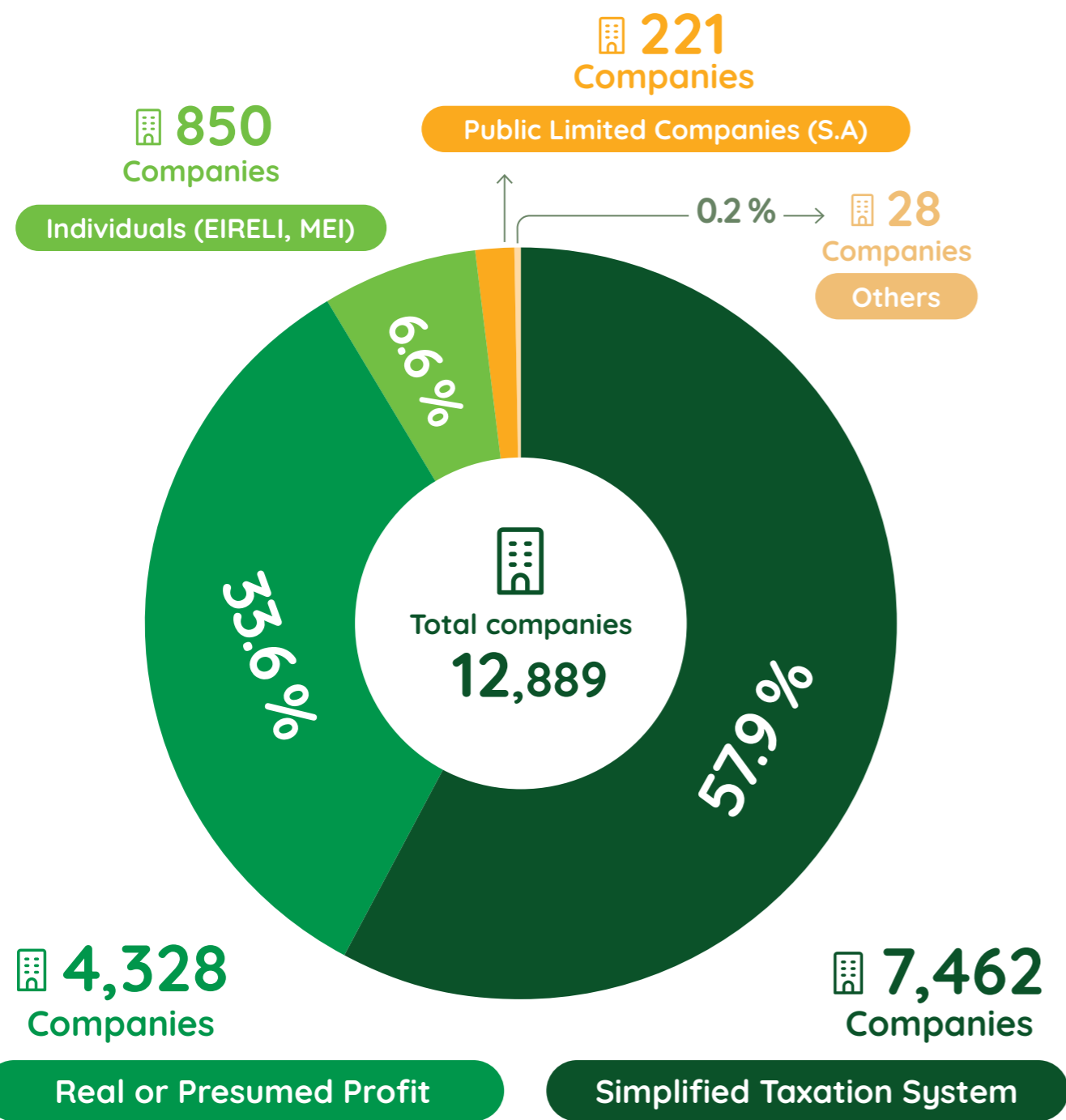


NET INDUSTRIAL SALES REVENUE

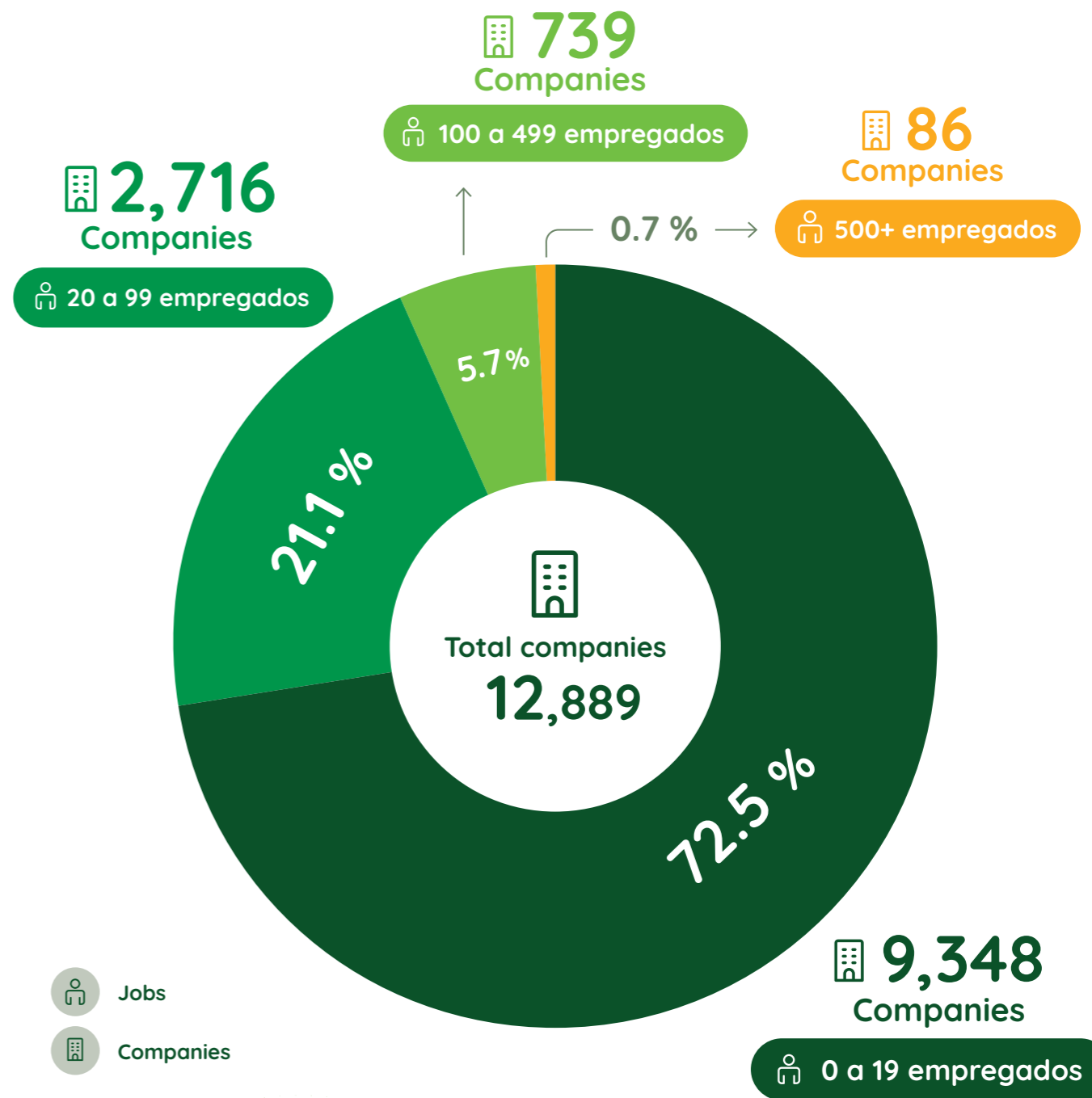


Source: IBGE: Pesquisa Indústria Anual 2023 / Elaboração ABIPLAST

TYPE OF COMPANIES OF THE PLASTIC SECTOR: BY LEGAL NATURE (2024)



DISTRIBUTION OF COMPANIES BY STAFF HIRED (2024)



Companies

Source: RAIS 2024 / Ministério do Trabalho e Emprego

57.9%
of companies in the plastic sector are SIMPLES NACIONAL companies

93.6%
of companies are considered small to industrial standards, as they count with less than 100 employees

670
with zero employees (among individual companies in the sector)

EDUCATIONAL LEVEL IN THE PROCESSED PLASTICS SECTOR (2022)

Illiterate
0.2%

👤 792

Secondary
education
incomplete
21.3%

👤 82,570

Secondary
education
complete
66.8%

👤 258,992

Higher education
incomplete
3.1%

👤 12,019

Higher education
complete
8.6%

👤 33,543

67%
of workers in the
sector have completed
secondary education

Source: RAIS / Ministério do Trabalho e Emprego

COM A HIL A INDÚSTRIA DE PLÁSTICO AVANÇA SEM SE PREOCUPAR.



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THE PLASTIC MATERIAL RECYCLING INDUSTRY IN BRAZIL



Did you know that recycling plastics is one of the main levers for the transition to the circular economy in the country?

The Brazilian plastic recycling industry is a key player in the waste recovery, job creation and the strengthening of a new logic of production and consumption, more efficient and sustainable.

THE PLASTIC RECYCLING INDUSTRY IN BRAZIL

1.55
million tons

of post-consumer waste used by the recycling industry in the recycling process



16.7
thousand
Jobs



1.7
thousand
recycling
companies



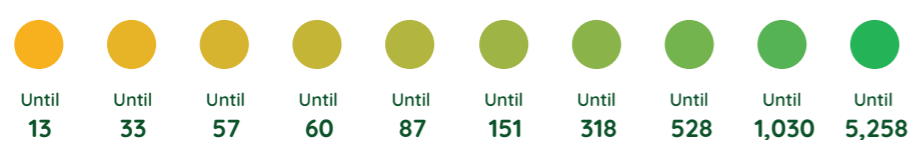
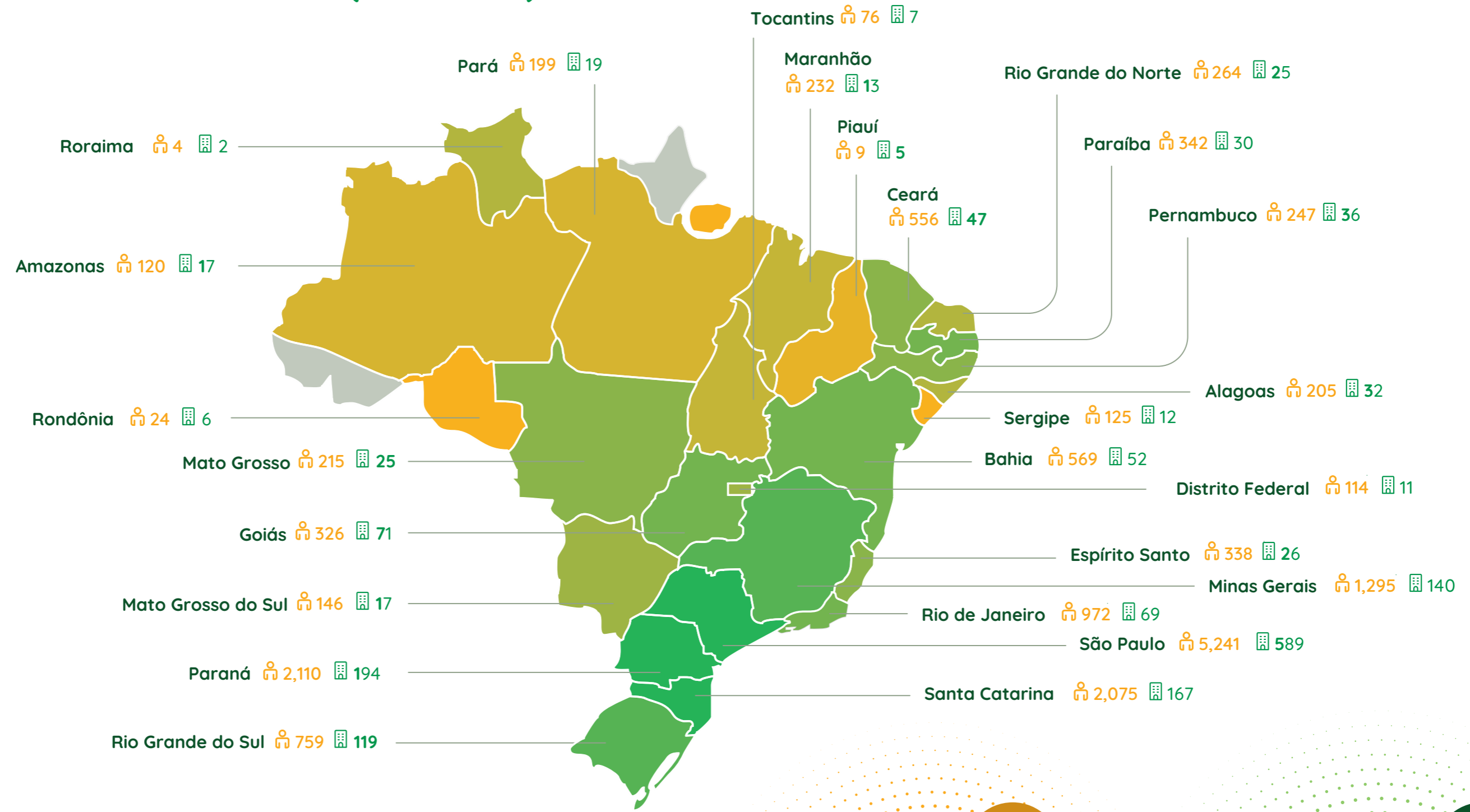
2.43
million tons
of installed
recycling capacity



1.012
million tons
of post-consumer
resins produced



LOCATION OF COMPANIES AND JOBS OF THE PLASTIC MATERIAL RECYCLING SECTOR (BY STATE)



16,738
Total of jobs
(2024)

1,742
Total of companies
(2024)

Source: RAIS e Novo CAGED 2024 / Ministério do Trabalho e Emprego

DISTRIBUTION OF COMPANIES AND JOBS (BY STATE)

Recovery of Plastic Materials

	Companies 2024	Brazil (%)
São Paulo	589	33.81
Paraná	194	11.14
Santa Catarina	167	9.59
Minas Gerais	140	8.04
Rio Grande do Sul	119	6.83
Goiás	71	4.08
Rio de Janeiro	69	3.96
Ceará	58	3.33
Bahia	52	2.99
Pernambuco	36	2.07
Alagoas	32	1.84
Paraíba	30	1.72
Espírito Santo	26	1.49
Rio Grande do Norte	25	1.44
Mato Grosso	25	1.44
Pará	19	1.09
Amazonas	17	0.98
Mato Grosso do Sul	17	0.98
Maranhão	13	0.75
Sergipe	12	0.69
Distrito Federal	11	0.63
Tocantins	7	0.40
Rondônia	6	0.34
Piauí	5	0.29
Roraima	2	0.11
Roraima	1	0.06
TOTAL	1,742	100%

PLASTIC RECYCLING SECTOR

Recovery of Plastic Materials

	Jobs 2024	Brazil (%)
São Paulo	5,241	31.31
Paraná	2,110	12.61
Santa Catarina	2,075	12.40
Minas Gerais	1,295	7.74
Rio de Janeiro	972	5.81
Rio Grande do Sul	759	4.53
Ceará	731	4.37
Bahia	569	3.40
Paraíba	342	2.04
Espírito Santo	338	2.02
Goiás	326	1.95
Rio Grande do Norte	264	1.58
Pernambuco	247	1.48
Maranhão	232	1.39
Mato Grosso	215	1.28
Alagoas	205	1.22
Pará	199	1.19
Mato Grosso do Sul	146	0.87
Sergipe	125	0.75
Amazonas	120	0.72
Distrito Federal	114	0.68
Tocantins	76	0.45
Rondônia	24	0
Piauí	9	0.05
Roraima	4	0.02
Acre	0	0.00
TOTAL	16,738	100%

SOCIOENVIRONMENTAL BENEFITS OF PLASTIC RECYCLING

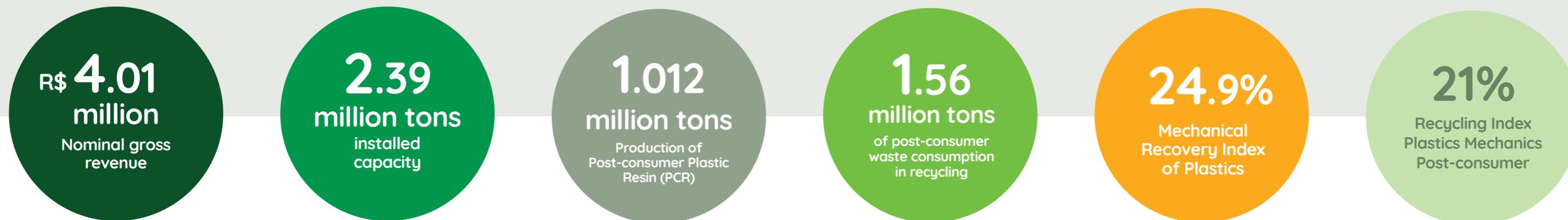
In addition to material recycling, for every 1 ton of recycled plastic produced, jobs are generated for 3.16 collectors who sort this volume of material in the month.



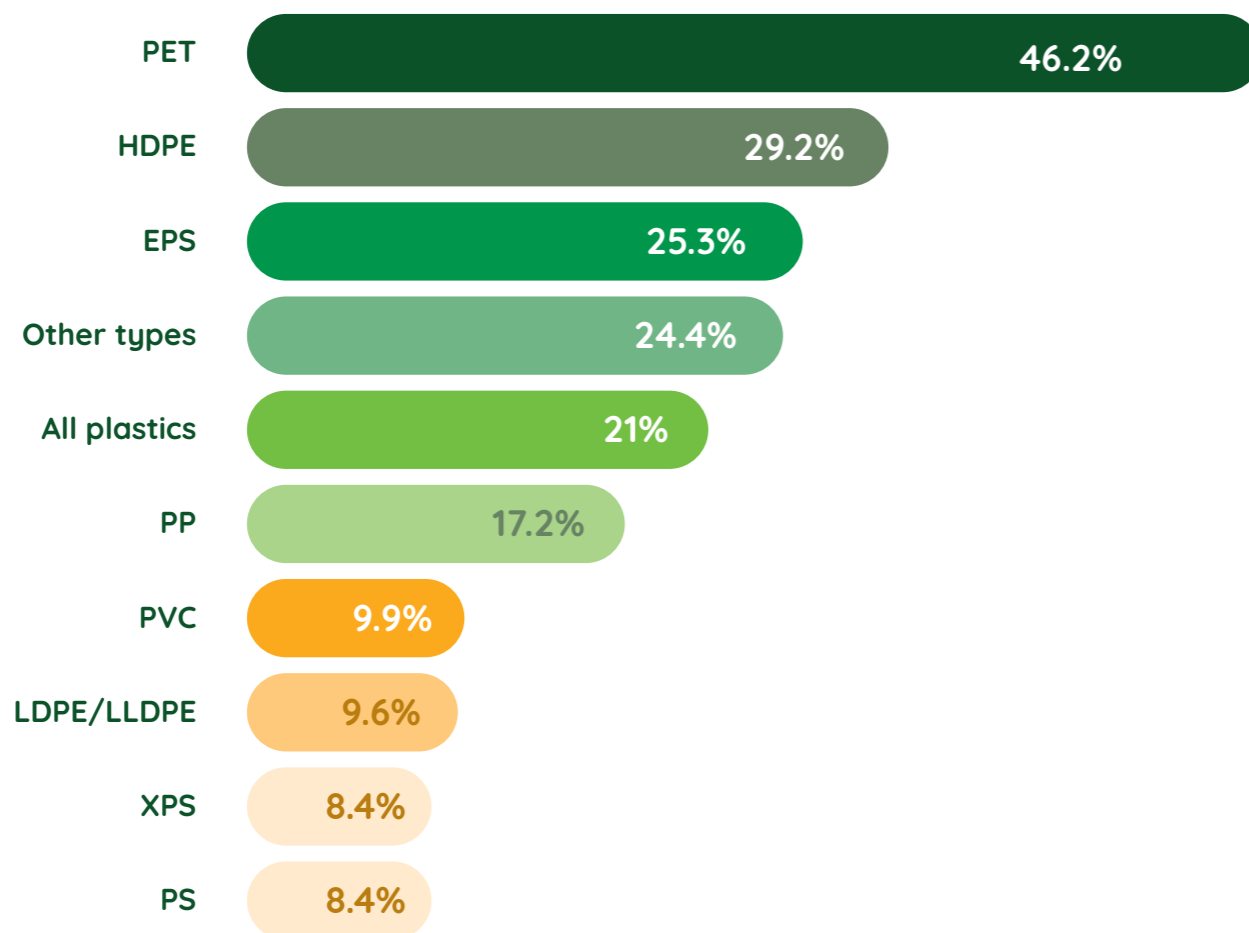
MECHANICAL RECYCLING FLOW OF PLASTIC WASTE



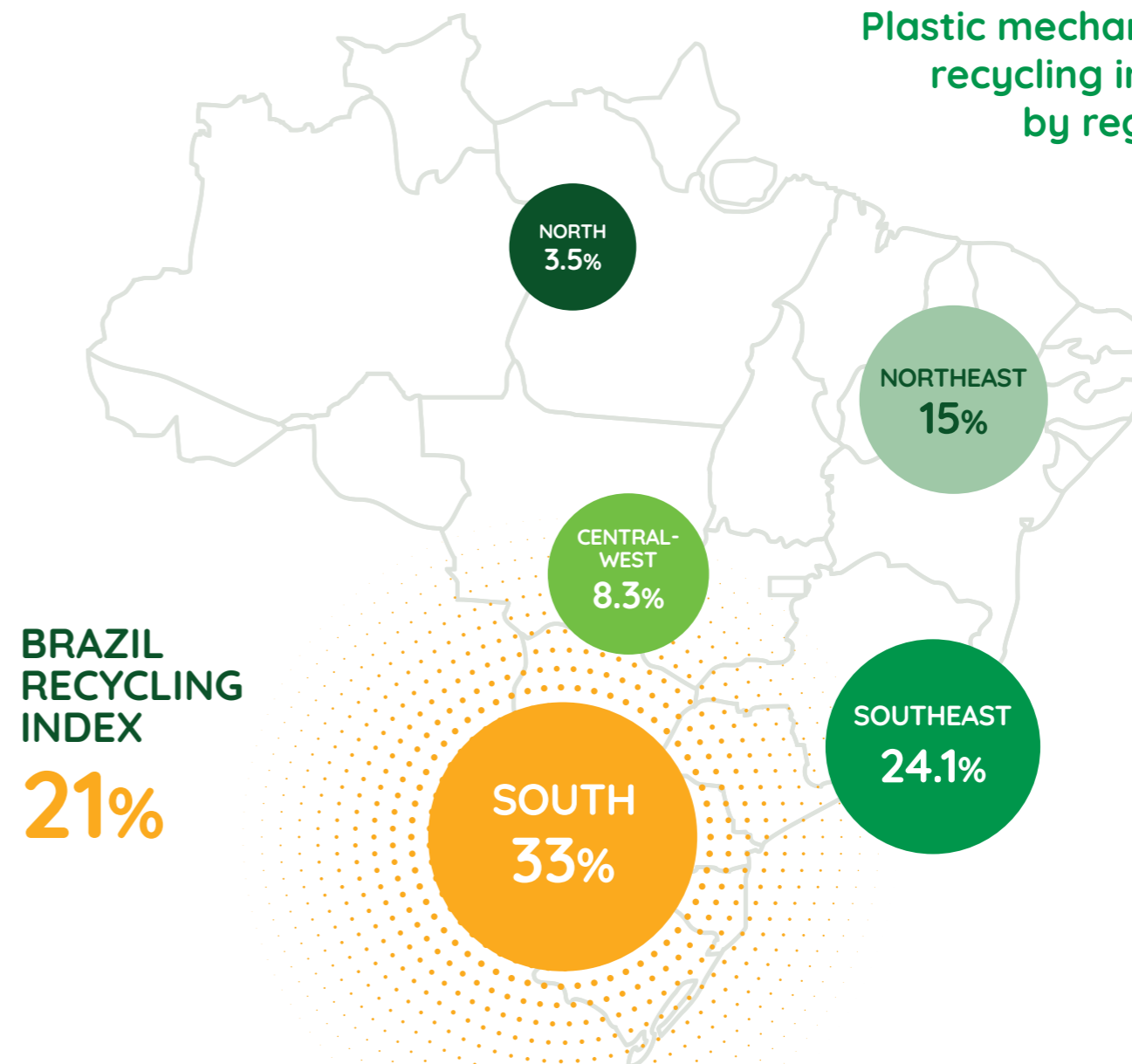
HIGHLIGHTS RECYCLING OF PLASTIC MATERIAL



Recycling Index of post-consumer plastic, by types of material:

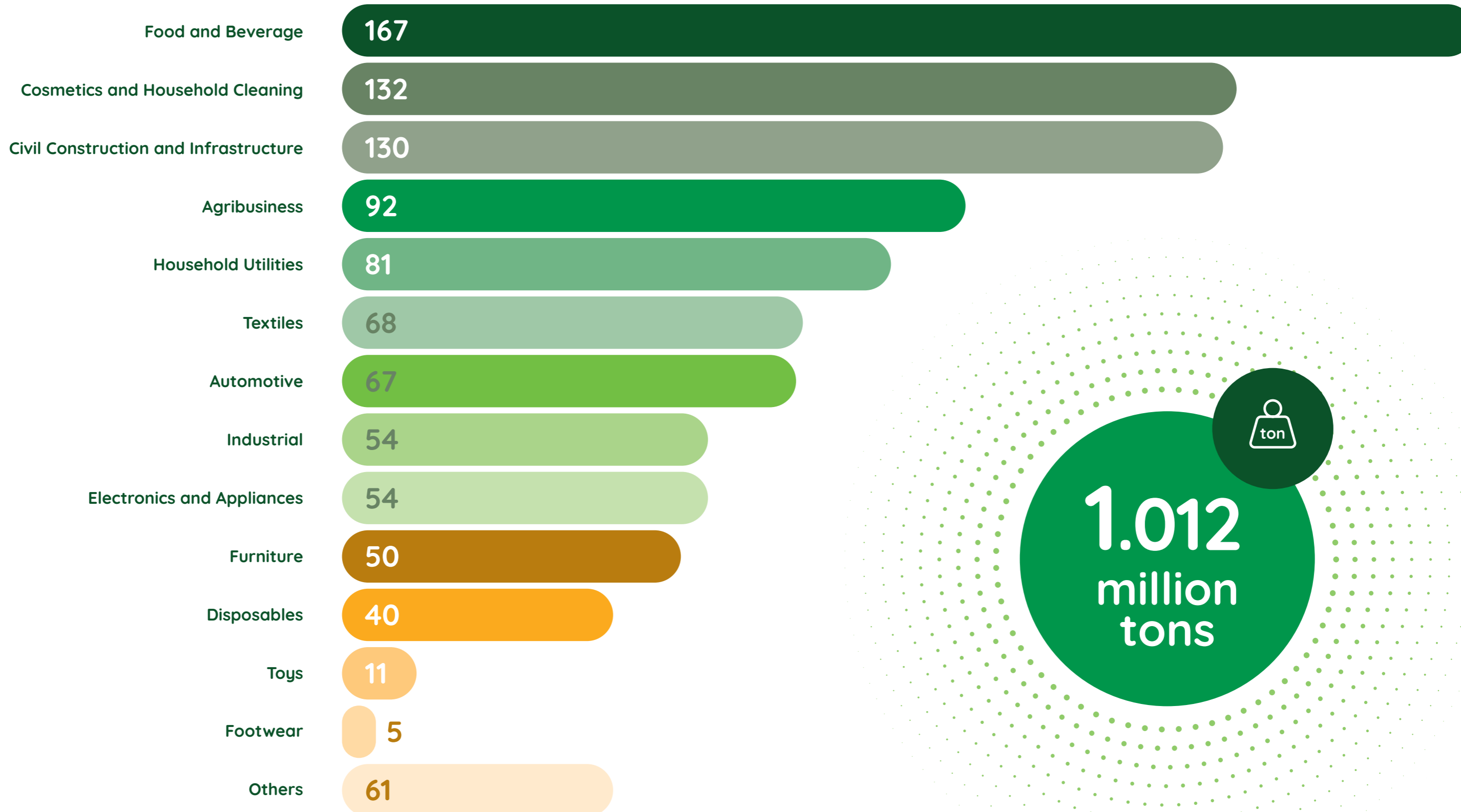


Plastic mechanical recycling index by region:



PCR PLASTIC SALES DESTINATION SEGMENTS IN 2024

Volume (thousand tons)



1.012
million
tons





PERFORMANCE OF BRAZILIAN PROCESSED PLASTIC INDUSTRY



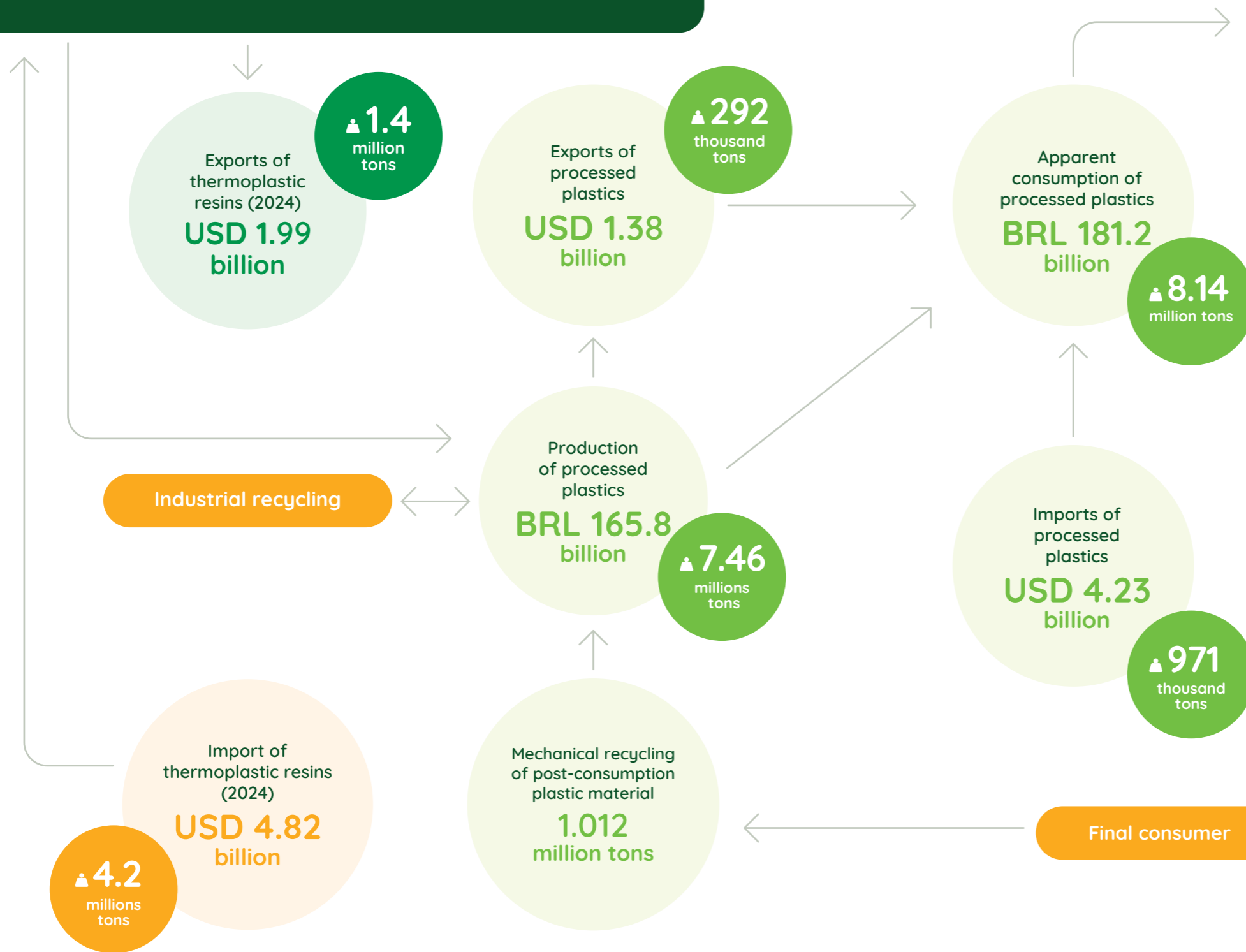
Did you know? Without plastic, waste of food in the world could double.

It protects, preserves and increases the durability of food along the logistics chain and in consumption.

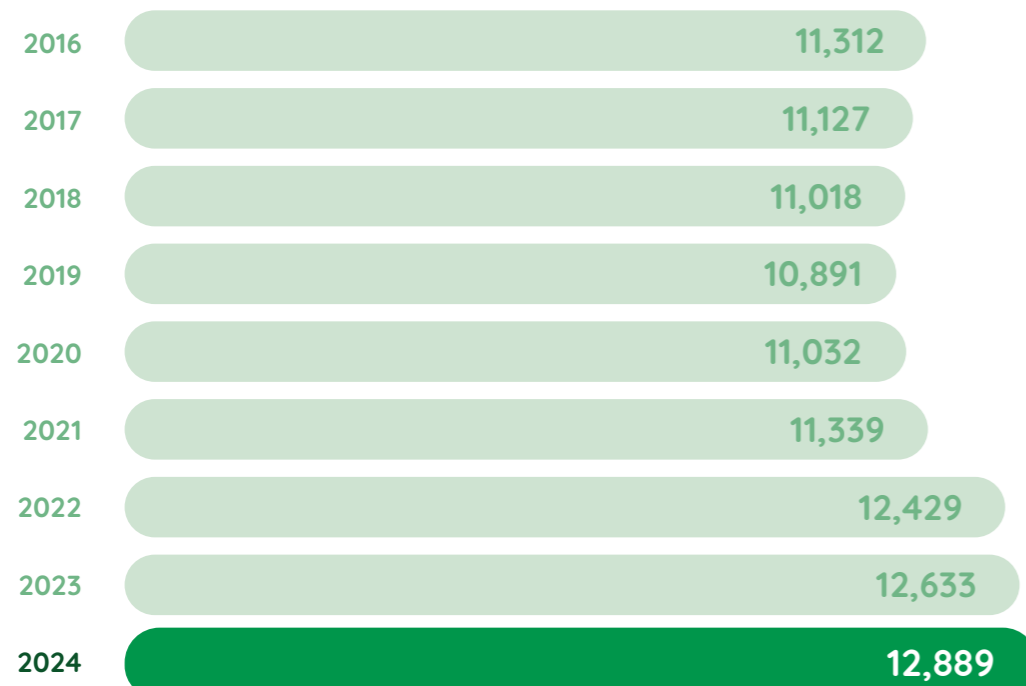
SUMMARY OF THE PLASTIC PRODUCTIVE CHAIN IN BRAZIL

Main resins consumed (2024)	PVC	HDPE	PP
	15%	15%	21%
	PS	LDPE	PET
	5%	7%	7%
	EPS	LLDPE	Recycled Plastics (2024)
	3%	16%	11%

Consumer sectors of plastic products (2023)	%
Construction	28.3
Food	19.0
Wholesale and retail trade goods	7.9
Automobiles and auto parts	7.2
Metal products	5.8
Machinery and equipment	5.3
Beverages	5.1
Furniture	4.2
Agriculture	3.2
Chemicals	2.9
Perfumes, hygiene and cleaning products	2.6
Paper, pulp and printing	2.5
Disposables	1.8
Electronics	1.7
Others	0.7
Pharmaceuticals	0.7
Textiles and clothing	0.6
Other transportation equipment	0.4



COMPANIES IN THE PROCESSED PLASTICS SECTOR



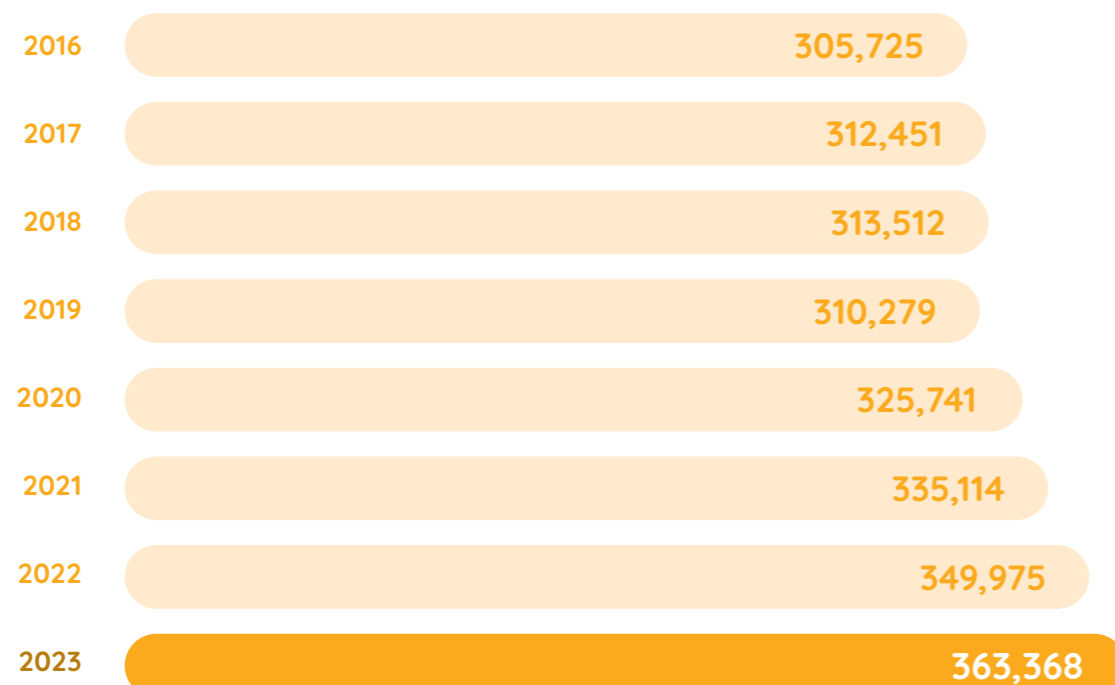
Source: RAIS e Novo CAGED 2024/ Ministério do Trabalho e Emprego

PRODUCTION OF PROCESSED PLASTICS (IN MILLIONS OF TONS)



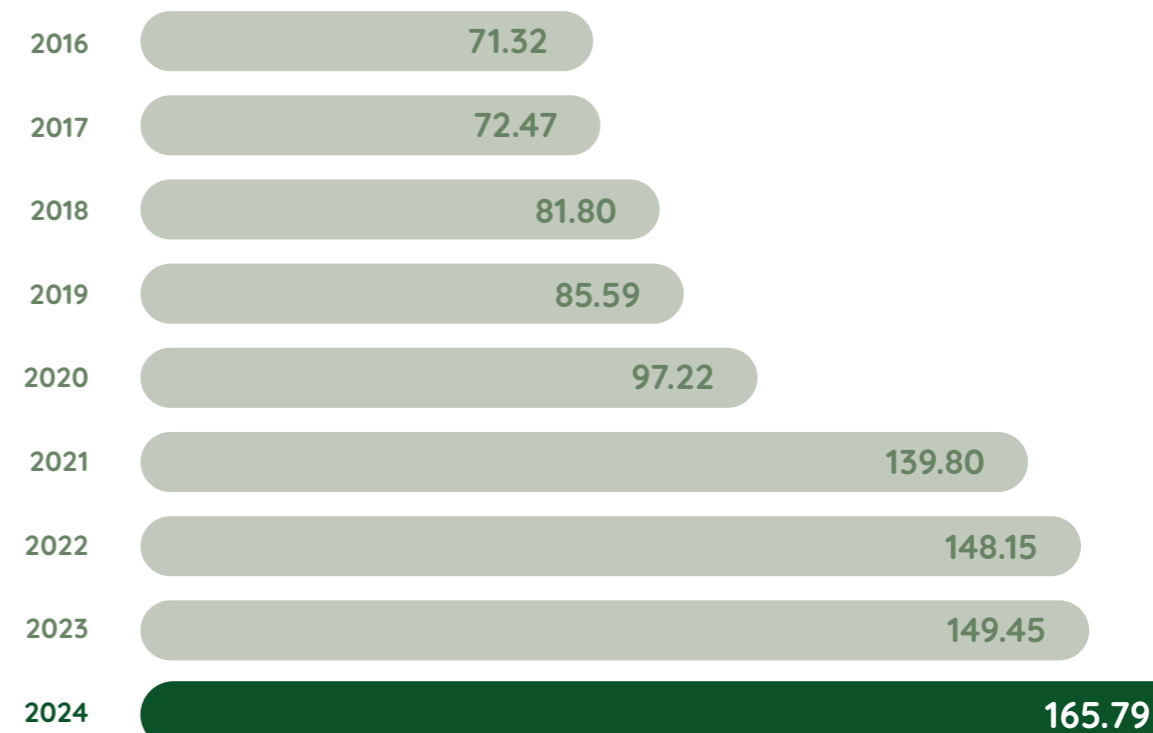
Source: IBGE - Pesquisa Industrial Anual (2022) e Pesquisa Indústria Mensal - Produção Física (dez23) / Elaboração: ABIPLAST

JOB IN THE PROCESSED PLASTICS SECTOR



Source: IBGE - Pesquisa Industrial Anual (2022) e Pesquisa Indústria Mensal - Produção Física (dez23) / Elaboração: ABIPLAST

PRODUCTION OF PROCESSED PLASTICS (IN BRL BILLION AT CURRENT PRICE)



Source: IBGE - Pesquisa Industrial Anual (2023) e Pesquisa Indústria Mensal - Produção Física (jan-dez24)/ IPP - Índice de Preço ao Produtor - Produtos Plásticos (jan-dez/24) / Elaboração ABIPLAST

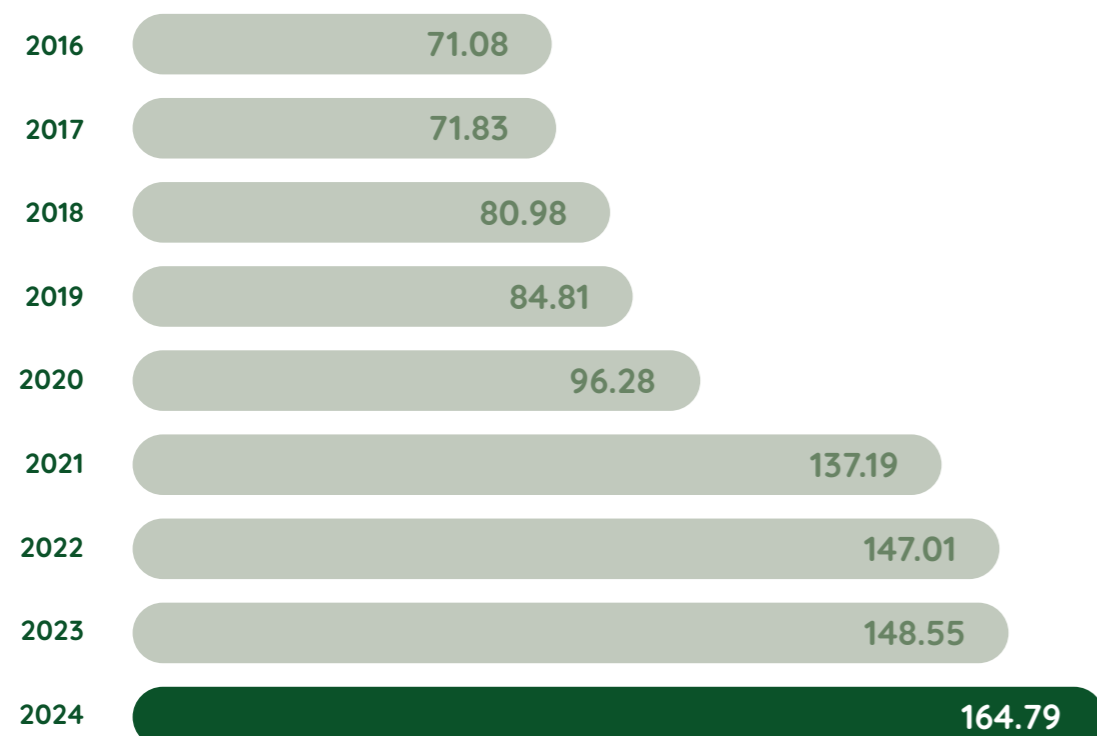


APPARENT CONSUMPTION OF PROCESSED PLASTICS (IN MILLION TONS)



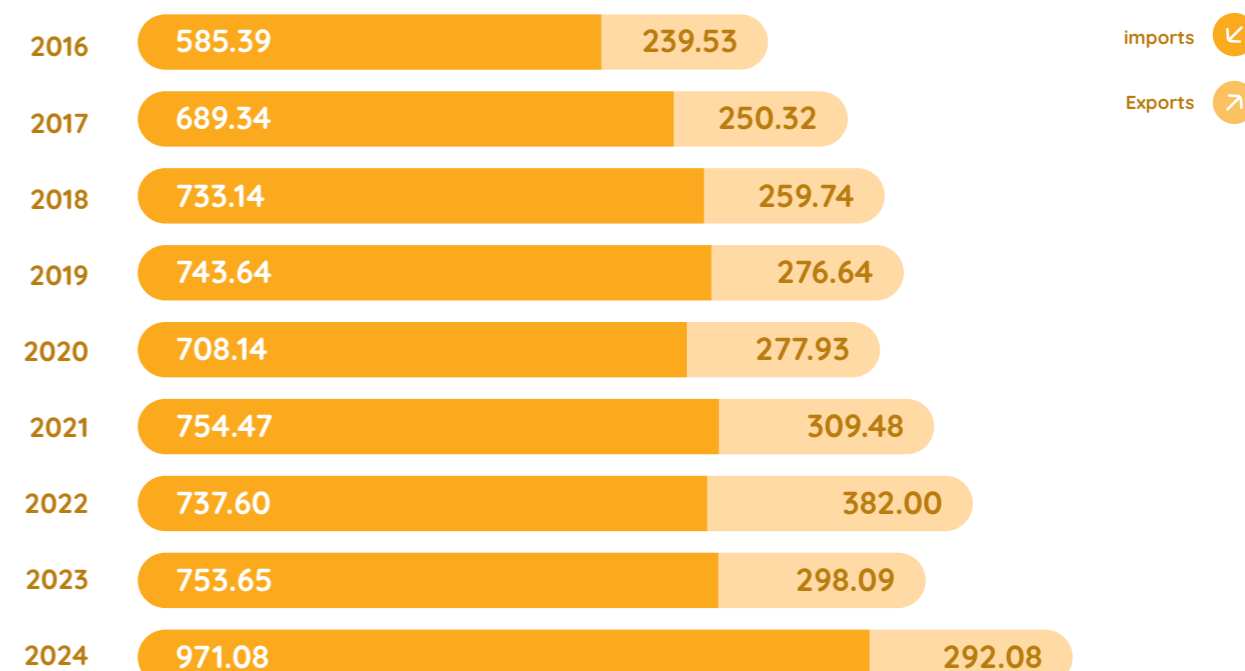
Sources: IBGE - Pesquisa Industrial Anual (2022) e Pesquisa Indústria Mensal - Produção Física (dez23) / Elaboração: ABIPLAST

REVENUES OF PROCESSED PLASTICS (IN BRL BILLION AT CURRENT PRICES)



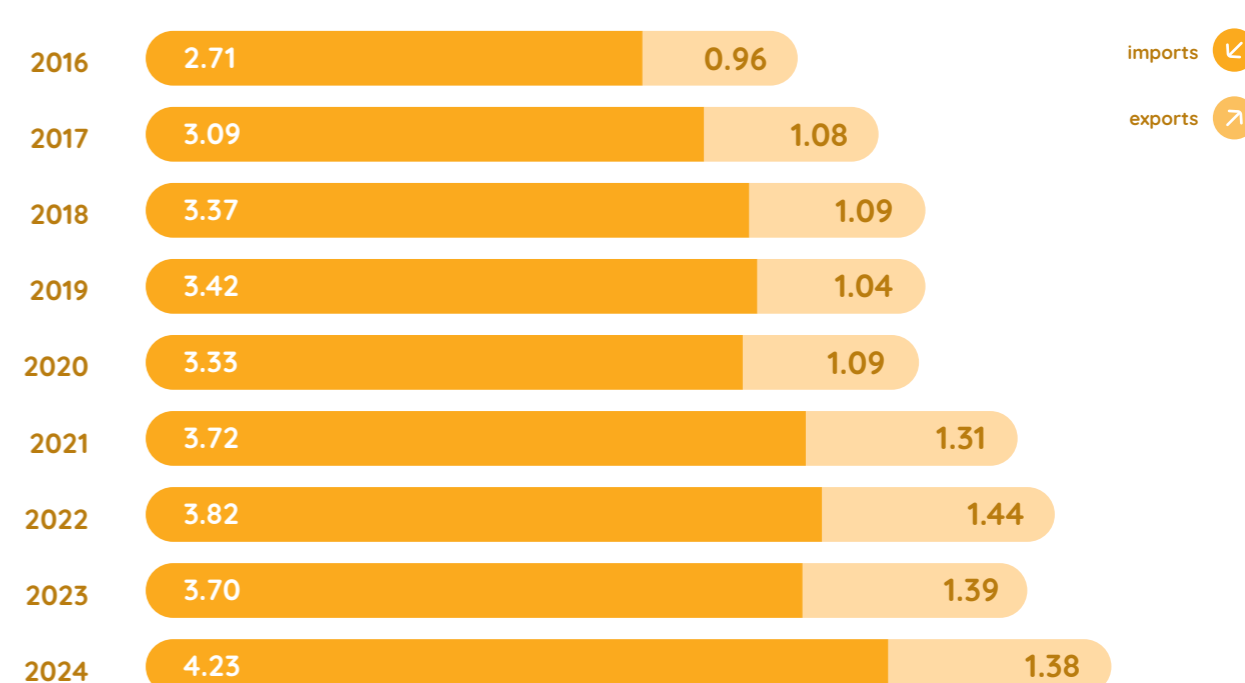
Sources: IBGE - Pesquisa Industrial Anual (2023) e Pesquisa Indústria Mensal - Produção Física (jan-dez24)
IPP - Índice de Preço ao Produtor - Produtos Plásticos (jan-dez/24) / Elaboração: ABIPLAST

PROCESSED PLASTICS EXPORTS AND IMPORTS (IN THOUSAND TONS)



Fonte: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços

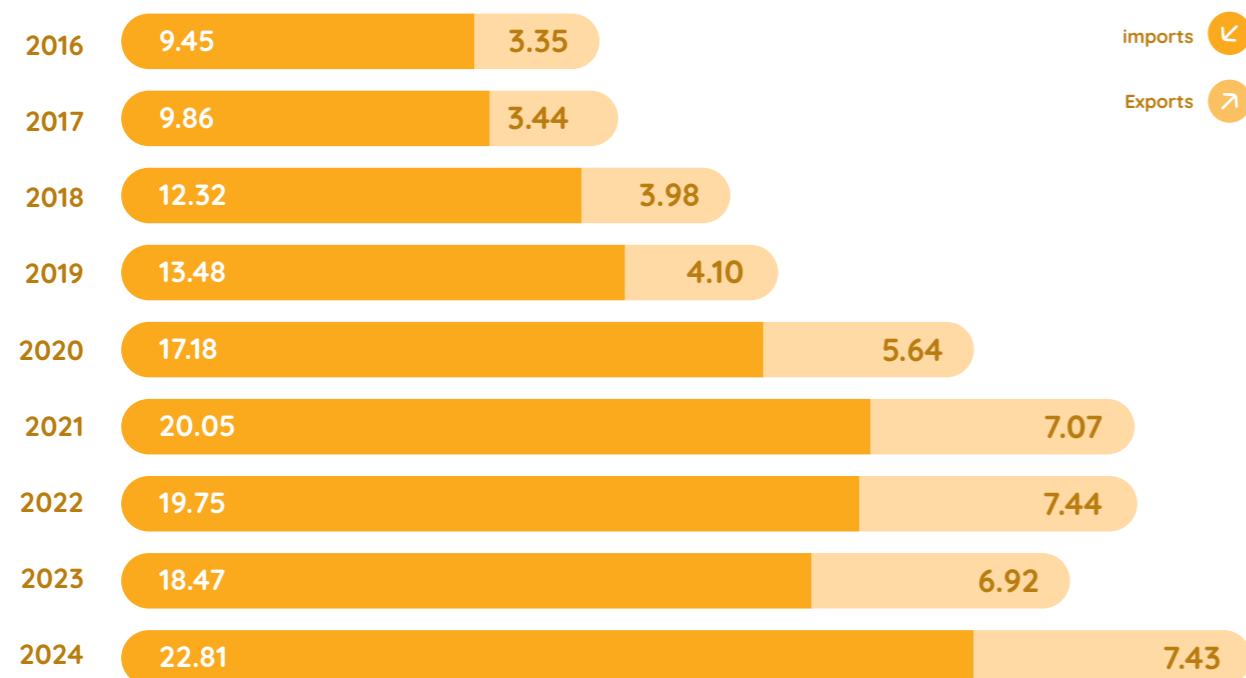
PROCESSED PLASTICS EXPORTS AND IMPORTS (IN US\$ BILLION)



Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços

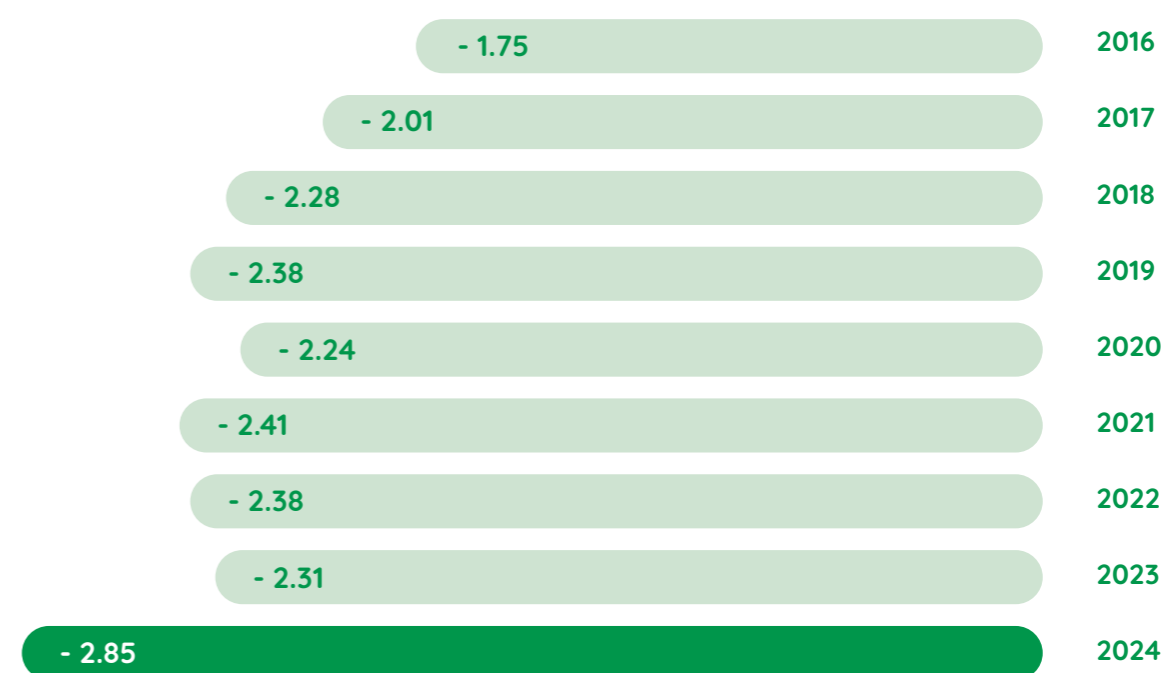


PROCESSED PLASTICS EXPORTS AND IMPORTS (IN BRL BILLION)



Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços

COMMERCIAL BALANCE OF PROCESSED PLASTICS (USD BILLIONS)



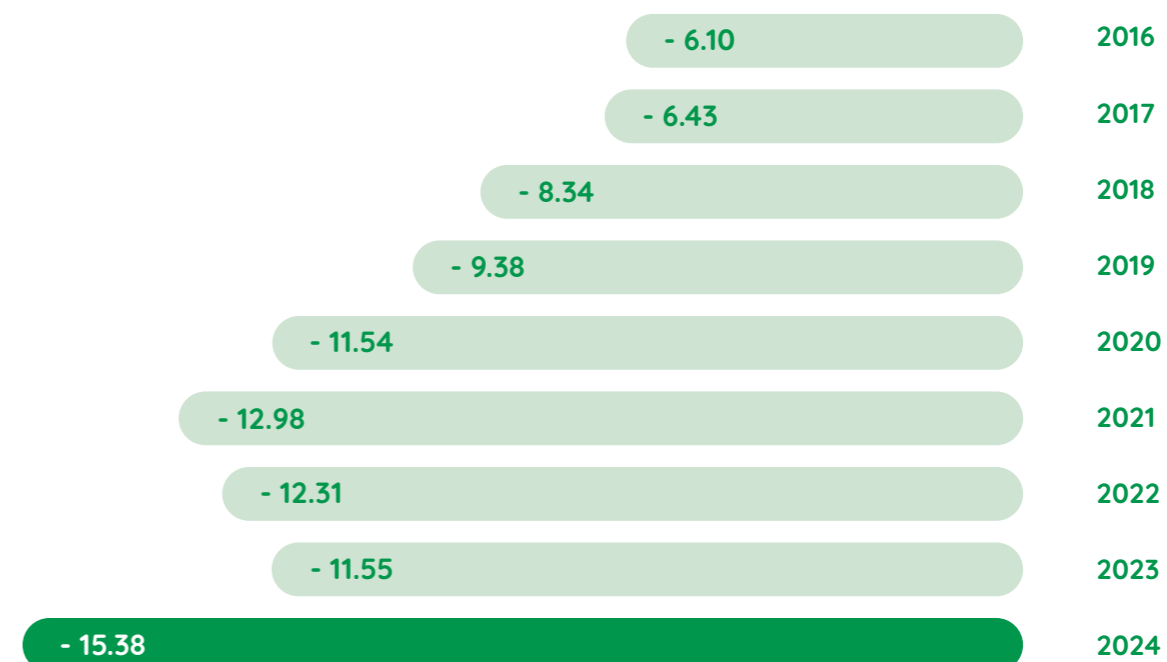
Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços

COMMERCIAL BALANCE OF PROCESSED PLASTICS (THOUSAND TONS)



Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços

COMMERCIAL BALANCE OF PROCESSED PLASTICS (BRL BILLIONS)



Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços



2024

MAIN ORIGINS OF IMPORTS OF PROCESSED PLASTICS



2024

MAIN DESTINATIONS OF EXPORTS OF PROCESSED PLASTICS

	Tons	% t	USD (FOB thousand)	% USD FOB		Tons	% t	USD (FOB thousand)	% USD FOB	
China	556,252	57.3	1,556,916	36.8		68,385	23.4	327,914	23.8	Argentina
India	52,284	5.4	125,716	3.0		29,679	10.2	155,129	11.3	United States
United States	28,585	2.9	468,776	11.1		38,709	13.3	140,522	10.2	Paraguay
Colombia	26,960	2.8	67,769	1.6		33,100	11.3	138,575	10.1	Chile
Germany	23,397	2.4	281,861	6.7		26,750	9.2	99,052	7.2	Uruguay
Paraguay	21,090	2.2	57,092	1.3		12,982	4.4	94,713	6.9	Mexico
South Korea	19,249	2.0	89,346	2.1		17,538	6.0	87,796	6.4	Colombia
Argentina	16,091	1.7	73,756	1.7		10,860	3.7	40,803	3.0	Bolivia
Italy	14,874	1.5	146,276	3.5		5,945	2.0	36,771	2.7	Peru
Israel	13,907	1.4	61,258	1.4		3,248	1.1	26,403	1.9	Germany
Vietnam	13,367	1.4	41,084	1.0		3,517	1.2	24,307	1.8	Ecuador
Peru	13,130	1.4	29,626	0.7		12,829	4.4	17,802	1.3	Spain
France	11,823	1.2	134,378	3.2		1,558	0.5	13,889	1.0	Angola
Hong Kong	11,589	1.2	33,839	0.8		2,294	0.8	12,906	0.9	Costa Rica
Thailand	11,261	1.2	60,563	1.4		640	0.2	12,217	0.9	China
Others	137,219	14.1	1,003,908	23.7		24,042	8.2	149,123	10.8	Others
TOTAL	971,078	100%	4,232,160	100%		292,076	100%	1,377,923	100%	TOTAL

Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços

Source: Comexstat / MDIC - Ministério do Desenvolvimento, Indústria, Comércio e Serviços





TOGETHER, TRANSFORMING THE PLASTICS INDUSTRY IN BRAZIL

ASSOCIATES

ABIPLAST's membership includes companies that process and recycle plastic materials. They are small, medium and large-sized industries, present throughout the country, both Brazilian and multinational.

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TRADE UNIONS & ASSOCIATIONS

In order to maintain strong representation of the sector at national level, ABIPLAST relies on the joint and collaborative work of 21 state unions, which strengthen the sector regionally, as well as partner associations, which help to reiterate the importance of our industries.

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GLOSSARY

ABS	Acrylonitrile-Butadiene-Styrene
EPS	Expanded Polystyrene
PA	Polyamide
PC	Polycarbonate
PCR	Recycled Post-Consumer Resin
HDPE	High-Density Polyethylene
LDPE	Low-Density Polyethylene
LLDPE	Linear Low-Density Polyethylene
PET	Polyethylene Terephthalate
PHV	Polyhydroxyvalerate
PLA	Polylactic Acid
PP	Polypropylene
PS	Polystyrene
PU	Polyurethane
PHB	Polyhydroxybutyrate
PVC	Polyvinyl Chloride
RDC	Board Resolution
SAN	Styrene-Acrylonitrile
XPS	Extruded Polystyrene



Perfil

2025



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