



# Polyethylene in Russia 2010

552 Tables

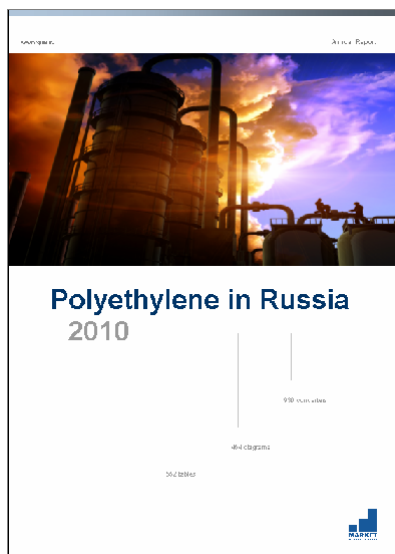
464 Diagrams

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*This Annual Report presents the in-depth analysis of the polyethylene market in Russia. In this Report we are offering a new format of analytics. The text of the Report contains the most important considerations (bullet points) written by our analysts, while the appendix represents all market statistics that could be generated. The Report describes the key trends in the polyethylene market in the context of technologies, sectors and types of finished goods. Forecast has been made by sectors and processing technologies. A great attention has been paid to analysis of investments into production and polyethylene processing.*

The Report includes analysis of consumption, production, exports and imports of PE in Russia by types, processing technologies, consumers, producers and their grades, as well as detailed statistics on operations of all large market players (producers, traders, equipment suppliers and converters) in each processing sector. All data refer to the period of 2000-2009. Furthermore, we present forecast till 2026. We continue to provide sales rating of the top 40 PE producers and top 40 PE grades. The Report includes profiles of top 20 PE suppliers in Russia, as well as the rating of top 50 PE converters. Our Report will give you answers for the following questions:

- What is the PE market development forecast till 2026? What are the outlooks for 2010 and 2012?
- What was the growth of PE processing capacities in each sector? Why, in spite of the 32% decrease in the pipe market, do investments into pipe extrusion continue to grow?
- How much did each large converter invested into PE processing? What brands of equipment did he buy?
- In which two sectors do investors expect growth of polyethylene consumption? Why?
- How can the recovery of Borealis's pre-crisis HDPE sales be explained?
- Why did we observed rocketing LDPE exports in 2009? What was the producer that radically changed his exports policy? To which country was he exporting?
- How did polyethylene producers' market shares changed in view of Sabic's aggressive policy?
- What new opportunities will Russian producers of stretch films have? Whom of foreign competitors will they be able to press? Why?
- How can the 51% growth of polyethylene supply in the sector of steel pipe extrusion coating can be explained?
- How will the situation change after the introduction of the Common Customs Tariff? Why do Russian companies lose more in case of the CCT than foreign players?
- Who are the leading converters in each PE processing sector? Who are TOP 20 in each sector? Who are TOP 50 in terms of PE processing volumes?
- Which PE grades are preferred by producers of films, molded goods, pipes, cable, etc.?
- Which processing sectors will recover quicker after the crisis? Who of converters was less affected by the crisis?
- How much will it take to recover record investment figures of 2008?
- How will the decrease in EUR exchange rate affect the Russian polyethylene market?
- How has the LLDPE market changed after the launch of the production in Nizhnekamsk? What changes are expected in view of the launch of the HDPE production in Salavat?

Report Statistics: 692 pages, 552 tables, 464 diagrams,  
175 585 words, 1159 companies referred to  
Format: PDF

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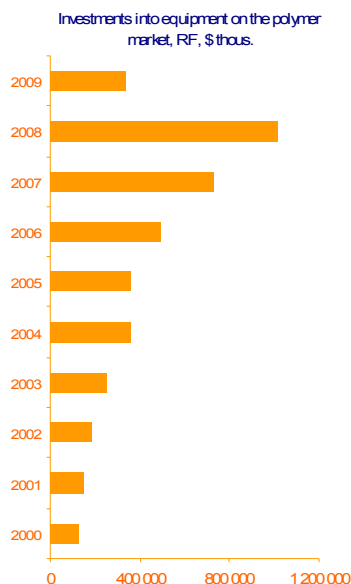
1. A.Schulman
2. Ab Rani Plast Oy
3. ABB Power Technologies
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683. Volgopromkomplekt  
684. Volzhskiy Orgsintez  
685. Volzhskiy trubniy zavod  
686. Voronezh Plast  
687. Voronezhtelekabel  
688. Voskresenskie mineralnie udobreniya  
689. Vurnavskiy Zavod Smesevih Preparatov  
690. Vyazemskiy Zavod Sinteticheskikh Produktov  
691. Vyksunsky Metallurgical Plant  
692. W.R. Grace  
693. Wafa Technologies  
694. Wavin  
695. Wavin-Rus  
696. Wenzhou Huangjianiao  
697. Westlake  
698. West-Plast  
699. Wilks  
700. Windmoller & Holscher  
701. Woodjin Selex  
702. Yaroslavskiy kombinat molochnih produktov  
703. Yaroslavskiy Zavod Rezinovih Tehnicheskikh Izdeliy  
704. Yelkenciler Makina  
705. Young Sang Industrial  
706. Youngin Engineering  
707. Yu Sheng  
708. Yug-Polymer M  
709. Yugtrubplast Pant  
710. Yuzhkabel  
711. Zagorsk experimental plant of plastic materials  
712. Zavod Agrokabel  
713. Zavod Beluzhkabel  
714. Zavod Elkap  
715. Zavod Energokabel  
716. Zavod po izolyacii trub, Timashevsk  
717. Zavod polietilenovih trub  
718. Zavod polimernih izdeliy, Kirov  
719. Zavod polimernoy tari  
720. zavod Santehkomplekt  
721. Zavod Tarnykh Izdeliy  
722. Z-d upakovochnih materialov  
723. Zhangjiagang Beier Machinery  
724. Zhangjiagang Fanchang Machinery  
725. Zhejiang Honghua Machinery  
726. Zhejiang Jinhai Plastic Machinery  
727. Zhillet, Group of Companies  
728. Zi-mak  
729. Zolotaya semechka, Group of Companies  
730. ZPI Alternativa

## Resume

### Were the trends defined correctly?



Source: Market Report

- Forecast made in the last year's MRC Annual Reports appeared to be exceptionally accurate. Strangely enough, we were right when we predicted the fall in PE, PS and PVC markets, as well as the decrease in investments into their processing. We expected that the amount of investments into polymers processing in 2009 would be USD350 mln., and in fact it equaled to \$339 mln. Though in 2008, investments amounted to nearly USD1 bln.
- We were probably wrong only about the forecast regarding PP: a 2% growth was quite unexpected to us. Also our basic hypotheses about the development of the polymers market described in our last year's Report came true.
- We assumed that the consumption model would change: demand for packaging films intended for inelastic foodstuffs would grow, whereas demand for molded goods for household appliances would contrariwise sharply go down.
- Let us have a look at the official statistics of 2009. Output of macaroni products went up by 9.1%, of cereal – by 9.3%, of oil – by 32.6%, of cheese – by 1.5%, of eggs – by 3.4%, of milk – by 0.7%, of shoes – by 2.3%, and contrariwise production of TV-sets dropped by 32.7%, of refrigerators – by 26.1%, of washing machines – by 16.3%, and of motor cars – by 59.4%.
- In view of the new consumption model some domestic polymers processing sectors have not the worst times. That above all refers to the foods packaging market (film extrusion, sheet extrusion, injection molding, etc.), where we observe positive investments dynamics, taking into account the crisis.
- A year ago we assumed that converters would have a very hard time. Their number would gradually decrease. At the same time, new large projects on polymers processing would be carried out only by foreign companies, or by subdivisions of Russian holding companies unladen with debts.
- Let us take a look at major investments into polymers processing in 2009. Major volumes belong to Russian subdivisions of international converters: Alpla, Gillette, BSKh, Greiner, Oriflame, Samsung, LG, Henkel, Heineken, Kutterer rus, Tetra Pak, Profine, Scholler arka, Deceuninck, Veka, Gealan and others. As a rule, such projects are financed head offices, for which 5-7 year payback period is not critical.
- Domestic medium and small converters implement today only thoroughly calculated projects with the payback period less than 4 years. We would not see any "somehow and other" expansions in 2009. Investment risk is minimal because only own funds are used to implement such projects.
- In this Report we paid great attention to macroeconomics trends; probably, even more than an industry research needs. But you must admit that today it's very important to examine the general economic situation, because all waves of uncertainty in the polymers market originate there.



## METHODOLOGY



Market development model is founded on  
forecast till 2026

### General Information on the Report

- The Annual Reports have been framed so that you could get a maximum complete and detailed picture after you have read it. We did our utmost to present the Report as an annual market encyclopaedia.
- Our reports can be used for the benefit of:
  - companies that are developing business plans for their projects on polymer processing, and they need marketing data/forecast on feedstock supply and potential sales of finished goods,
  - investment companies and banks that analyze potential investments into processing,
  - converters that expand production,
  - producers/traders/suppliers, and any other companies that are going to enter the market or to increase own market share within the next year.
- Generally, apart from analysis of prices selected from our Price Reports, statistics on production/exports/imports selected from our Monthly Reports, our Annual Reports contain the following data:
  - Statistics on consumption/domestic supply/import of a certain polymer grade/certain producer by each processing sector
  - Rating of producers in each processing sector
  - Rating of producers' feedstock grades in each processing sector
  - Detailed statistics on production/exports/imports of finished goods in a specific sector
  - Detailed analysis of trends in each processing sector
  - Rating of converters (processing volumes, investments, transportation by rail, proceeds)
  - Analysis of the market of monomers
  - Macroeconomic data, statistics on production in specific processing industries and in construction
  - Detailed analysis of converters' investment projects
  - Interpretation of the most important news and expert opinions over the course of the year.
- All data are presented in accordance with overall annual results. All values of the year under discussion are compared with similar periods of the eight previous years. Separately, you will find [marketing forecast](#) till 2026.
- All diagrams and tables in the Appendixes are made up automatically. The methodology includes unified processing of all fragmentary data that we use to understand activities of each converter. Data from Annual Reports fully agree with information presented in [PlastGuide](#).
- [PlastGuide](#) helps form any reference in [on-line mode](#) by each converter mentioned in this Annual Report. This is a unique software system that includes marketing data on 20 thousand companies operating in the CIS polymers market. An individual strong aspect of [PlastGuide](#) is the set of [credit ratings](#) by each converter that allow assessing not only general financial performance of a converter (on the basis of Altman scoring model), as well as to understand advisability of giving commodity credits to such converters.
- To prepare this Annual Report, we used statistics provided by the Federal State Statistics Service, State Customs Service, Russian Railways, Ministry for Economic

Development, Central Bank of the Russian Federation, as well as producers' data, expert opinions, information of world and Russian analytical companies, and own Market Report Company's data.

- Having clicked on a [hyperlink](#) in the text, you will get to the page where the described value can be found; then having clicked on the hyperlink of that value, you will get back to the page of the text.

#### Classification of Products

- The basic classification of products analyzed in the Report included the world generally accepted classification of PE grades:
  - LDPE – low-density polyethylene (high pressure), density is up to 0.94g/cm<sup>3</sup>;
  - HDPE – high-density polyethylene (low pressure), density is more than 0.94g/cm<sup>3</sup>;
  - LLDPEП – linear low-density polyethylene (high pressure), density is up to 0.94g/cm<sup>3</sup>;
  - EVA – ethylene copolymer with vinyl acetate;
  - Other ethylene copolymers;
  - Other (masterbatches on the basis of PE-matrix, additives, etc.).
- We adhered to general Foreign Trade Codes just partially, since actual imports of PE grades do not correspond to commodity items indicated in importers in customs declarations. Use of just Foreign Trade Codes could have led to serious distortions in research results. Therefore, we applied our own, more precise correlation of sold products with PE grades by producers' brands.
- For example, Hipten 22003 of Petrohemija is LDPE, though buyers may be inaccurate and indicate it as HDPE or even LLDPE.

#### Customs Duties

The total import duty on PE by all Foreign Trade Codes of Group 3901 is 10%.

#### Data Directories

- The Annual Report contains data processed in general reference guides:
  - 15 principal (directly affect consumption volumes), as well as five auxiliary (affect consumption volumes indirectly), polymer processing technologies;
  - 64 polymer processing sectors – from BOPS-containers to fittings;
  - 124 types of finished goods – from shrinkable film to refrigerators or car bumpers.
- The general data tree in all Annual Reports has a three-level structure: [Processing Technology](#), [Processing Sector](#) and [Type of Finished Goods](#).

### Processing Technology

- We analyzed processing technology for which each polyethylene grade is meant. We included the following PE processing technologies that are generally accepted in the world:
  - **Film Extrusion** (Blown, Cast). By types, films are divided into general-purpose films, hothouse and dairy films. As a rule, with MFI at about 2 (hereinafter on default MFI is indicated at 190 °C/2.16 kg). As well, multi-layer (MFI from 1.5 up to 4), shrinkable (MFI from 0.2 up to 0.7) and stretch films on the basis of LLDPE (MFI from 1 up to 2).
  - **Injection Molding**. Depending on finished goods (boxes, caps for PET bottles, etc.), they use grades MFI from 6 up to 120. The main volumes of PE injection molding grades belong to MFI 10-12.
  - **Extrusion Blow Molding** (EBM). In our Report we tried to divide processed PE products into finished goods with the capacity up to 0.5 l (flasks, bottles for cosmetic industry and for dairy products); for them they use brands with MFI 0.3-0.8, as well as into large-capacity EBM goods (canisters for oils, barrels, fuel tanks) – brands with MFI 0.7-0.9 are good for them.
  - **Pipe Extrusion**. As a rule, this HDPE processing technology refers to brands dyed in black, grey or orange colours with MFI 0.2-0.6. Among pipe grades we tried to mark out separately PE 63, PE 80 and PE 100.
  - **Cable Extrusion**. There are special cable brands for this technology (as a rule, in the form of compounds on the basis of LDPE) with MFI about 2.
  - **Extrusion Coating** (Pipe, Packaging). In our Report, we marked out brands (as a rule, LDPE, MDPE) for extrusion coating of steel pipes with big diameters (MFI from 0.4 up to 0.8) or for multi-layer paper packaging (MFI from 3 up to 10).
    - The Report contains information on grades (these are LDPE and MDPE, as a rule) intended for extrusion coating of big-diameter pipes (MFI from 0.4 to 0.8) or multi-layer paper packaging (MFI from 3 to 10).
  - **Other**. We separately singled out production of tubes made of HDPE, as well as injection molding goods (soles for footwear) made of EVA.
- The accurate identification of consumption by markets was impeded by the fact that manufacturers from the CIS have brands that can be used in several markets simultaneously. For instance, the 15803-020 LDPE grade is used by processors in absolutely different processing sectors (from film extrusion to blends in injection molding and EBM). Therefore, the distribution, for example, of this brand, which is manufactured by Kazanorgsyntez, Polymir, Tomskneftechem, Angarks Polymer Plant, SNOS and Ethylene-Polyethylene (Sumgait), was carried out on the basis of experts' assessments.
- Technology implies the primary polymer processing method, which directly affects its consumption volumes. For example, molding, cutting of bags or re-granulation could also be considered a polymer processing technology; however, they affect polymer consumption volumes indirectly; therefore, we did not include them into general analysis of production capacities. Our conclusions, for example, as to PE bags cutting were based production capacities, the so-called **primary** PE processing, i.e. in accordance with the film extrusion technology.

### Processing Sector

- Processing sector is needed for more detailed analysis of consumption in a specific polymer processing technology. As a rule, processing sector is a reference guide subordinate to processing technology guide. We use 18 processing sectors to analyze the PE market.

### Blow Molding

- containers <1L
- containers <= 2L
- containers <= 10L
- containers =>10L
- other containers

### Cable Extrusion

- cable shell

### Injection Molding

- footwear
- other
- packaging and wrapping materials
- fittings

### Extrusion Coating

- steel pipes
- packaging

### Film Extrusion

- blown
- cast

### Pipe Extrusion

- corrugated pipes
- rigid pipes
- polymer pipes
- hoses

### Types of Finished Goods

- As a rule, detailed elaboration by sectors is not enough to understand trends in polymers processing. Therefore, we apply a subordinate guide – types of finished goods. Their total number is 49, and the list is as follows:
  - automobile chemistry
  - containers
  - household chemical goods/cosmetics/pharmaceutics
  - buckets
  - water
  - pressure-water
  - pressure-gas
  - goods for pets
  - construction
  - heat supply
  - drainage
  - rigid pipes
  - cable
  - sewerage
  - channels
  - stationery
  - glue, additives
  - caps for PET bottles
  - cardboard lamination
  - tape
  - metal-plastic
  - bags
  - bags/inserts
  - multi-layer
  - dairy
  - no-pressure systems
  - footwear
  - garbage bags
  - retail bags
  - pallets
  - beer
  - food
  - footwear soles
  - coating
  - corks/covers
  - other
  - reservoirs, tanks
  - scotch
  - stretch
  - hothouse
  - shrinkable
  - molded containers
  - household goods
  - thin-walled packaging
  - big-diameter pipes
  - office files
  - fittings
  - hoses
  - boxes

### Belarus

- Supplies of Byelorussian LDPE to the Russian market are not recorded in export-import transactions of the Russian Federation. Hitherto, all assessments of the Russian polyethylene market have not accounted PE supplies from Belarus (supplies exceeded the level of 35 KT in 2007). In our Report we took into account supplies of Byelorussian polyethylene to the Russian Federation and estimated the market capacity taking into consideration these data. We don't take into account exports of Russian polyethylene to Belarus, which doesn't exceed 20-25 thousands tons, i.e. not more than 2 % of overall consumption in Russia. In our opinion, this difference can be neglected, especially if to consider, that the majority of polyethylene produced in Belarus is subsequently exported to Russia without any records of such exports on the part of the Russian customs bodies.

### Market Players

- All market players can be classified as follows:
  - Producers
  - Converters
  - Manufacturers
  - Traders
  - Importers
  - Exporters
  - Equipments producers
  - Groups of companies.
- Names of market players are given without inverted commas, their organizational and legal status is omitted, as well we apply a general name of a group of companies without names of their subsidiaries. For instance, Basell Polyolefins Orlen Polyolefins Sp.z.o.o. is called simply as Basell Orlen, Dow Europe GmbH – Dow, etc.

### Groups

- As a rule, each market player represents not only one but several companies, and each of them can actually be a converter, a trader, as a well as a person concerned with. We have grouped those companies that are interrelated through affiliated structures, and we have referred to them as to a single market player.
- We understand that large players may have a complicated management system: some are focusing on production assets, others on exports/imports, the third are responsible for domestic supply, the fourth are servicing companies, and the fifth are dealing with general management, etc.
- If we hadn't grouped market players, we would have had serious inaccuracies from the point of view that a company might have big production capacities but there would be no data on production, another one might have data on production but there would be no imports, the third company would have no data on any of the aforementioned but it would deal with domestic supply (by rail). Some companies included 5-6 enterprises; Polyplastic Group, for example, includes eleven companies.

### Producers

- Producers are companies that are engaged exclusively in production of polymers: i.e. analysis excluded all trading, resale and offshore companies.

### Converters

- A converter is deemed a company (a group of companies) that has polymer processing capacities and uses them to process polymer feedstock.

### Manufacturers

- Manufacturers are foreign converters.

### Traders

- Companies that do not have polymer processing capacities but they have purchased or sold polymer feedstock of equipment.

### Equipment Producers

- Companies producing polymer processing equipment. The list of equipment producers includes about 450 companies.

### Suppliers

- Companies that supply feedstock (equipment) to converters. Both traders and producers of feedstock or equipment can be suppliers.

### Importers / Exporters

- Producers, suppliers, traders and converters can be importers and exporters.

### Rating of Converters

- We have worked out an integral market effect indicator by each converter. This indicator is a reduced weighted value obtained on the basis of statistics analysis of each six values of this year:
  - - output of finished goods, MT
  - - exports of finished goods, MT
  - - direct domestic supply from producers by railway, MT
  - - investments into processing (progressive total since 2000), USD thous.
  - - imports, MT
  - - additions to capacity (progressive total since 2000), MT.
- In the respective sections of the Report, you will find two ratings of converters. The first one is the rating of individual converters (without “group” markings). The second one is the rating of groups of converters (with “group” marking). For example, PE and PP converters in the sector of automobile chemistry packaging – Lukoil-Permnefteorgsyntez and Lukoil-Volgogradorgsyntez – are considered as each converter, as well as Lukoil Group.

### Prices

- The Report contains prices reduced to one basis in compliance with Incoterms 2000:
  - Import: DDP, Moscow
  - Domestic: CPT, Moscow
  - Export: DAF, border of the Russian Federation.
- For detailed analysis, see Methodology of Price Reports.

### Machine Capacity

- We did our best to show how polymer processing capacities have been expanding by each individual converter. We identified each brand of purchased equipment, its rated capacity; as well, depending on the type of a converter, we identified overall rated capacity as to processing of a specific polymer on that equipment. To calculate annual capacity gain, we applied nominal time fund at the level of 5 000 hours per year (two shifts, 6.8 hours of actual operation without shutdown for shift change or change-over). By some lines and converters we adjusted time up to 6 000 hours; in single instances, we used 6 500 hours.
- Capacities were calculated on the basis of own rates for each type of equipment in each technology. If was just enough to know nameplate capacity for a specific brand in kg/h for a film or pipe extruder, then it was certainly not possible to obtain such value for an injection molding machine. For example, for each group of molded finished goods, we identified a typical product, and by shot volume and plasticizing capacity (for injection molding machines) we finally identified rated polymer processing capacity.
- As to polymer mixing (compounding), we applied different number of batches (from 3 for Chinese and up to 7 for German mixers). For EBM, we also defined goods to be produced on that equipment, and the nominal rated capacity of each line was defined on the basis of the weight of such product.
- Completeness of equipment was also checked by its each unit. As a rule, big lines are being imported as a set of shipments. Sometimes, delivery of one line extends for more than 6-8 months. In any case, we deem each line not as a number of sets of shipments, but as one complete line.

### Investments

- The Report contains information on investments into polymers processing. Estimated values of such investments cannot be accurate, since the cost of acquired equipment may differ while crossing the border, or equipment can be contributed to an authorized fund of a company in Russia with the indication of a price that correspond to the actual level of prices. With the help of the obtained data, we can rather analyze trends in polyethylene processing than define the accurate amount of investments.

### Imports of Finished Goods

- Some tables of the Report that describe consumption of a specific polymer by technologies, contain data on imports of finished goods. Tables intended for analysis of such imports mainly include those finished goods where the share of a specific polymer exceeds 50% of the total weight. For instance, imports of laminated packaging could have been of interest from the point of view of how much PE for extrusion coating had been imported into Russia. However, that figure was not included into tables on imports. Contrariwise, 98-99% of the total weight of stretch films belong to film-grade polyethylene; therefore, data on stretch films imports are included into general figures on PE consumption in "Film Extrusion" technology.

### Diagrams and Tables

- Often diagrams in the Report are duplicated by respective tables. This has been done deliberately, whereas the diagrams may help define one or another trend, and the figures from the tables are necessary for more accurate analysis.

### Forecast

- Many tables and diagrams in the Report include forecast up to 2025. As a rule, making forecast we used the method of linear trend extrapolation, the polynomial trend extrapolation method, the Box-Jenkins model (ARIMA), as well as the method of



experts' evaluations. In case there are no stable data during the period from 2000 to 2008, then the forecast for that line could be omitted. For longer periods (5 and more years), we forecast production of polymers on the basis of expert opinions, as well we make respective exports forecast. Afterwards, Data Analysis Software independently distributes data by technologies, sectors and types of finished goods, in compliance with the market model developed by MRC's analysts. A principally different forecasting method is used for the nearest four years; it is based on analysis of each processing sector and its influence on overall polymer consumption.

#### Designations

- The following designations are used in the Report: MT – metric ton, thous. – thousand, KT – thous. ton, KTa – thous. ton per year (capacity), mln. – million, RUB – Russian rouble, USD – US dollar, EUR – Euro.

#### Growth Indexes

- As a rule, growth index in the tables is the relation of the index during the analyzed period to the previous one. In case of illogically high (low) indexes, for instance - 900%, we put “-“.

#### AAGR

- AAGR, % - is average annual growth rate over the indicated period calculated as n-th root, where n is the number of years in the analyzed period.

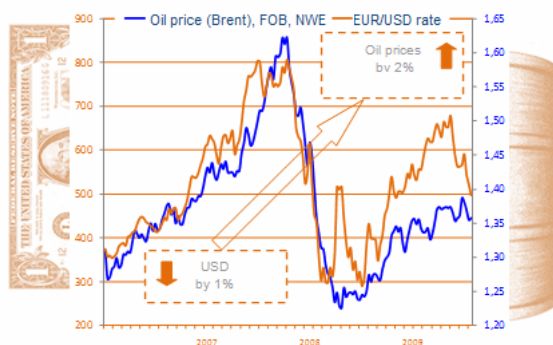


...quotations from the Report...

Many problems in the world still remain unsolved

- Nowadays experts start talking more about a high probability of the second crisis wave. According to Deputy Head of the Ministry of Finance **Sergey Storchak**, global markets will still have to survive more than one collapse, because the economy is still unbalanced. At St. Petersburg Economic Forum 42% of delegates responded that they expect a W-shaped crisis. **Anatoly Chubays**, Head of Rosnano, proposed a WWW-shaped crisis model.
- In short, by now an interim result for the global economy is as follows: the whole world continues to live in the state of uncertainty.
- Large funds were invested into economies of different countries; liquidity pumping took place. However, main problems that led to the crisis still cannot be resolved. Speculative mechanisms continue their development all around the world, giving life to new bubbles. Today they are connected with serious imbalances in foreign trade. There is a huge deficit in trade balance in the USA and, at the same time, a big trade surplus in China.
- High exports from China are, first of all, connected with its current development policy (understating of the exchange rate, hence attraction of investments and increasing competitiveness of Chinese products).
- If China decides to change the rate of Yuan in 2010, as it is being asked by all leading countries of the world, the supply structure of polymer finished goods will change immediately.
- Current macroeconomic surroundings are still difficult to forecast. The main thing is that the nature of new digits and trends in the global markets is still not transparent. Bad credits in many countries, first of all, in the USA, are written off, but the “bubble” model has not disappeared. Because of the threat of default in Greece and probably Portugal the Euro exchange rate decreased from \$1.61 (in August 2008) to \$1.21 (in June 2010). For example, for the polymers market it means that European polymers became 25% more attractive compared to Asian or Middle Eastern feedstock.
- Prices for oil and all polymer raw materials grow in proportion to the decrease in the dollar exchange rate (a stable preemptive connection with a time lag of 4 weeks). At the same time, technical analysis of these factors tells us that a burst of volatility in the currency market leads to the growth of oil prices next month.

Changes of the Yuan and Euro exchange rates will play the most important role in the world economy in 2010.



Source: Market Report

...quotations from the Report...

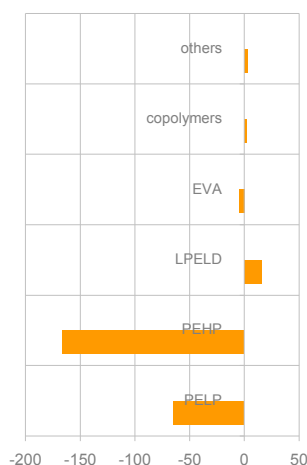
## 2. Russian polyethylene market

### 2.1 The current state of the market

- Within 2001-2008 polyethylene market in Russia increased on the average by 11% annually. However, in 2009 the consumption decreased 14% and made up only 1.3 mln tons, having reduced to the level of 2006.
- In 2009 real polyethylene production capacities increased 11% and were equal to 1641 KTa. At the beginning of the year Nizhnekamskneftehim implemented new capacities on LDPE/LLDPE with volume of 230 KT (swing-technology).
- A general PE production volume in RF in 2009 increased 6% (1 398 KT). Practically all year long production capacities were activated by 85%, which corresponds to average current European indexes. According to CMAI data, in 2009 European polyolefin manufacturers were loaded by 86% at the average.
- The domestic demand decrease led to a reduction by 13% (to 971 KT) of home delivery volumes of domestic manufacturers. At the same time, exports volumes increased in more than twice (about 427 KT), having reached its historical maximum.
- General volumes of PE imports reduced by 14% (331 KT) and by results of 2009, imports' share in consumption made up 25%. For instance, in 2007 imported material's share on the market exceeded a level of 30%.
- Russian market still remains a powerful LDPE net-exporter. By results of the year, clear exports (difference between exports and imports) made up 238 KT (or 57% of LDPE's consumption volumes), which is the highest index for the last decade. A small LDPE net-imports amount remains at the level of 28 KT, which in future will probably increase, though in slow rates.
- By results of the year, a total PE consumption reduced by 215 KT. Admitting that, 70% of this reduction are connected with LDPE market, domestic sales of which decreased 166 KT. HDPE market reduced by 64 KT (this factor's weight in the common reduction equals to 27%), and LLDPE market, on contrary, increased almost by 16 KT.
- It seems to us that the situation with LDPE shouldn't be much dramatized. It's just that Russian manufacturers, particularly in the 4<sup>th</sup> quarter of 2009 tried to export LDPE on to foreign markets. First of all, this concerned Tomsk PE exports to China. By results of 2009, general LDPE and TPCP exports exceeded 189 KT, when in 2008 this index was equal to 62 KT.
- As a rule, a price by exports is lower than the home price at the average by 100 USD/t and for a manufacturer it's less profitable to export, than to sell within a country, although exports allow loading capacities. Thus, in 2009 LDPE capacities were loaded by 109%, which is a decade minimum.
- In the structure of demand remains a trend of replacing LDPE by HDPE grades (56%) and LLDPE grades (9%). A share of LDPE in 2009 made up 32% of the market, when in 2002 it still amounted to 40%.
- LLDPE market grows rapidly. A calculated consumption of LLDPE in RF grew from 2000 in more than 50 times. In 2008 its level overstepped a psychological point of 100 KT, and in 2009, despite of the common decrease, the consumption increased almost by 16% (up to 116.2 KT).



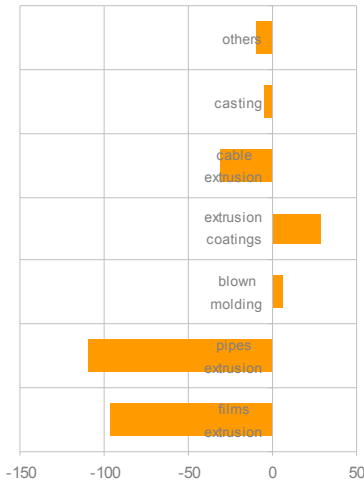
Market change factors in the last year, KT



Source: Market Report

LLDPE market increased in 50 times in a decade

Market change factors in the last year, thous. t



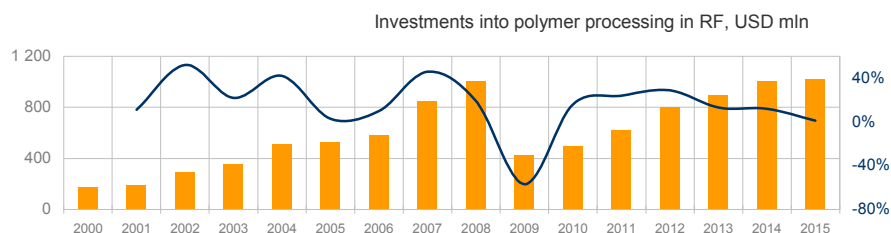
Source: Market Report

- In 2009 a trend of exports volumes' growth, which started in the 4th quarter of 2008, strengthened. A very low level of demand for the domestic market promoted this, as well as devaluation of ruble, which increased competitiveness of domestic raw materials on foreign markets. Probably in 2010 exports deliveries will reduce due to a contemplated ruble's strengthening.
- Average monthly deliveries of PE on Russian market in 2009 were below 2008's level and made up about 105 KT. The biggest decrease was observed in April 2009, when domestic deliveries were on the same level as in 2005. In the second half of 2009 monthly deliveries stabilized at a point of 115 KT.
- 5 out of 7 PE processing sectors in 2009 demonstrated decrease. Exceptions were two sectors: extrusion coating (+51%) and blown shaping (+5%). "Leaders" of sales decrease were pipes extrusion (-32%) and cable extrusion (-27%).
- In extrusion coatings sector PE deliveries grew by 30 KT at once and reached before-crisis indexes of 2007. 2008 was the most difficult for steel pipes manufacturers, PE consumption volumes decreased more than 37%. The current growth completely compensated the last year's market's reduction and we are very optimistic as to this market's appraisals in 2010.
- We can't be this optimistic about PE pipes manufacturers though. By results of 2009, pipes PE consumption decreased 109 KT. Precisely this sudden decrease, as well as films grades deliveries reduction (by 96 KT), led to a considerable reduction of general indexes all over the PE market.

...quotations from the Report...

## 2.2. Investments into polyethylene processing

- Last year turned out bad for all investors into polymer business. On the market in 2009 only 331 PE processing line was implemented. This level is the most minimal over the past decade. For example, in 2008 converters installed 685 such completed lines with a common capacity more than 557 KTa.
- A general nominal increase of PE processing capacities in 2009 made up only 209 KTa. This is 63% lower than last year's indexes. We don't consider this number critically small: there are still enough capacities on the market that were implemented still before 2009.
- According to our appraisals, a general increase of PE processing capacities in 2009 fell on pipes extrusion sector (+92 KTa), next was films extrusion sector (+57 KTa) and cable extrusion (+28 KTa). Investments show that converters finally have optimistic expectations towards business perspectives in these sectors. Perhaps we'll see PE consumption's increase exactly in these sectors in the nearest 1-2 years.
- According to our appraisal, in 2009 investments into PE processing equipment made up about 116, USD mln. Of course, the crisis brought its corrections into strategies of manufacturers and converters. Many investment programs are put aside for several years. A profitability of others became very doubtful, as many other projects were directed to available long money, that doesn't exist on the market today. A dominating trend, which appeared last year will be a problem of efficiency's from a capital invested increase.



Source: Market Report

- In terms of unavailability of crisis means, general investments into Russian polymer business decreased to the level of 2003 – by 282, USD mln. This looks peculiarly pessimistic, compared to a record 2008, when investments into equipment exceeded the level of 1, USD bln.
- Many of before-crisis investments into equipment were realized in general at the expense of currency crediting. After the devaluation of the end of 2008, the price of an interest on credit in conversion of currency to rubles increased at the average in 1.5-2 times.
- Sooner of all, in the nearest future we'll continue observing a number of employees' reduction and their absorbing by other bigger companies. It's not excluded that by 2014 in RF a number of Russian converters will increase in 1.5-2 times.
- "Liquidity storm", mentioned a year ago, thereof about 10-15% of Russian converters will become technically bankrupt, unfortunately isn't over yet. Some companies managed to go through the crisis years of 2008-2009 on an accumulated "airbag". However, losses of 2009 and a consumer demand that still hasn't rehabilitated, will summon a new bankruptcy wave.

...quotations from the Report...

Largest investments into PE processing in Russia in 2009, USD thous.

Company	Investments, USD thous	Technology of PE processing
Tatca	Please, see the full version of the Report	
Em-		
Poly		
Sch		
Imm		
PC		
Dan		
Troo		
Alfa		
Glas		
Poly		
Auto		
Fink		
Kop		
Itals		
DPA		
Kirs		
Tpk		
Sos		
Syb		
MS		
Evro		
Mor		
ABB		
Orid		



Source: Market Report

...quotations from the Report...

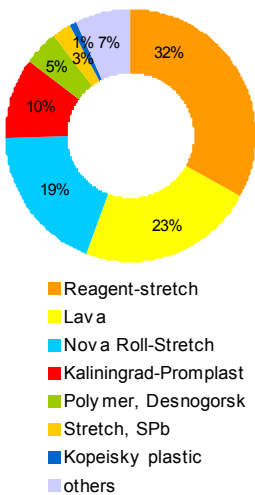


### 2.3.4 Stretch-films

- Polyethylene stretch film is a modern packaging material, produced from LLDPE and a number of its copolymers. Its main peculiarities are: an ability to convertibly stretch with lengthening, reaching 280-330% and an ability to stick to its opposite surface, at the same time, not sticking to other objects.
- Russian stretch-films market refers to a number of the most dynamically developing national markets, possessing at the same time a considerable capacity. If in 1999 it was equal to 18 KT, than in 2009 it was equal to already 100 KT.
- In Europe the stretch-film market's increase occurs at the expense of other transportable packaging's substitution, such as strap-stripe and shrink-wrap. In Russia stretch-films market's growth occurs at the expense of new productions' development, modernization of the present ones, and accordingly, films consumption growth at the present clients. First of all, this concerns fast-developing companies of food industry and branches, connected with it.
- A substitution of a stretch shrink-wrap doesn't take place in a large scale. This is connected with a fact that shrink-wraps, due to inexpensiveness of domestic raw materials, cost in 1.5 times cheaper. Despite of a higher price, stretch-films use saves up to 30%, compared to shrink-wraps, due to smaller raw materials consumption.
- LLDPE production's development on the territory of Russia leads to prices decrease on this type of raw materials and, as a consequence, to the primary cost decrease on stretch-films. And this factor in its turn affects the attractiveness of production's development in terms of increasing demand.
- In 1999 in Russia a total number of 700 tons of stretch-films a year was produced in Russia, preferably by blowing. In 1999 only 3 companies were manufacturing it: Agromashplast (Uspensk, Moscow district), Dialog-Germes (Moscow) and DPO Plastic (Dzerjinsk).

In 2001 a first modern stretch-films production was launched

Structure of stretch-films production in RF, %



Source: Market Report

Characteristics of production of main stretch-films manufacturers

Company	Equipment manufacturer	A number	Capacities on all
Reagent-stretch			
Lava			
Nova Roll-Stretch			
Plas			
Poly			
Kop			

Please, see the full version of the Report

Source: Market Report

- Capacities deciphering by installation lines on liquid stretch-films production see [here](#).
- At the beginning of 2008 Lava Company, whose main activity is multilayered polymer films production (stretch-films on LLDPE basis, shrink-wrap, green-house films, masking-films and others), imported a cast-line Dolci/Bielloni Castello for 5-layered films production. The line's cost is 3.4, USD mln. In 2009 the company invested only into a crusher. According to the company's plans, a monthly issue in future will be increased to 5000 tons of stretch and 700-800 tons of blown films.

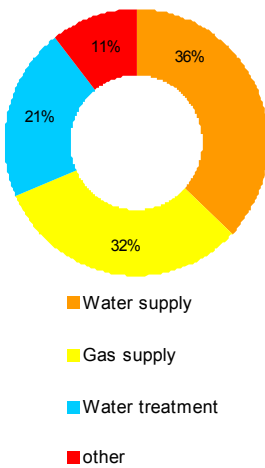
...quotations from the Report...

## 2.4 Pipes extrusion



- Within last 8 years Russian pipe PE market is one of the fastest-growing markets in the world. However, this sector's stagnation that had begun in the second half of 2008 brought in its own correctives. By results of 2009 a calculated consumption of PE made up about 232 KT, which is even less than in 2006. A general decrease of PE pipes market made up 32%.
- The largest RF's polymer pipes, according to Rosstat, are listed [here](#).
- Pipes consumption volumes in RF are directly connected with subventions, issuing within the budget to subjects of RF on pipeline system's construction and modernization. A revival of the demand for pipe production in whole depends on government programs' development on gasification and water supply, and also from the revival of a construction sector's increase, which is supposed to be rehabilitated not earlier than in 2011, according to experts.
- The main reasons of consumption decrease on all pipe types for water, gas and heat supply, were the following:
  - An increase of housing and communal services financing;
  - Large projects fulfillment by FEC;
  - Paying a bigger attention to the problem of energy saving;
  - Growth of project organizations' interest towards PE pipes, determined by a normative admitting of PE pipes application.

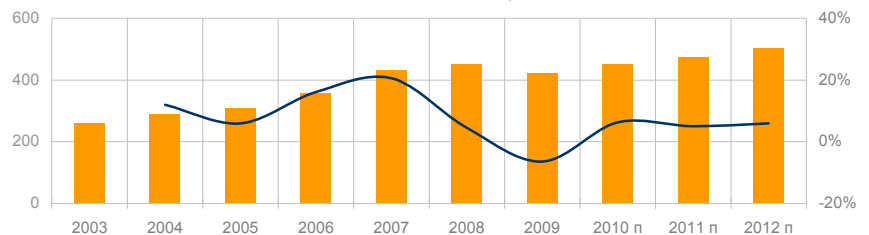
A structure of polymer pipes consumption in RF, %



Source: Market Report

- A growth of tariffs on natural monopolies will quite possibly make every family think about losses in old pipeline systems and their modernization, which will create an additional stimulus for the pipe market, especially in a segment of small diameter pipes.

Consumption of small diameter pipes (up to 110) in water and heat supply systems in RF, mln. m

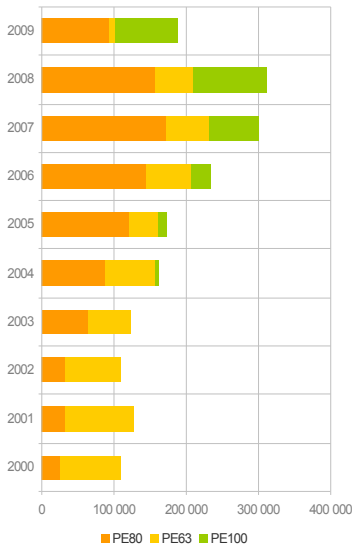


Source: AMI, MED

- Positive factors, stimulating the branch's growth, are programs on energy saving and energy efficiency's increase. Thus, according to Russia's Gosstroj, in the current year 300 thousand accidents happened on heat lines (2 accidents per 1 km of a pipeline). Admitting this, 29 thous. km of heat nets are in horrible condition. Heat losses during transporting reach on the average 60% and throughout the country make up more than 80 mln. t. That means that at the present time every 5<sup>th</sup> ton of fuel is wasted on atmosphere and ground heating.
- Water pipe systems are doing as badly: according to statistics, leaks and unconsidered losses of water in water supply systems are equal on the average throughout Russia to 15-20% (3-4 bln. m3) of all the water supplies a year, and in a number of cities leaks reach 40%.



Types of PE pipes consumption, t



Source: Market Report

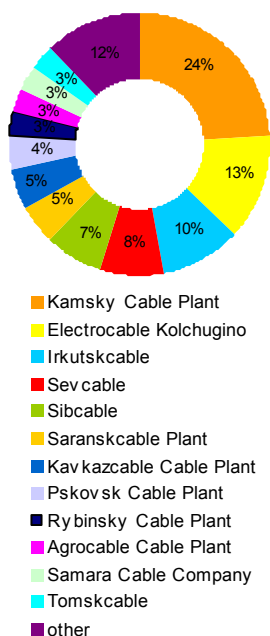
- Within 2005-2009 89.4, RUB bln. were invested into construction of intercity gas lines; 892 intercity gas lines with length of more than 14 thousand km were built. A gasification level within 2005-2009 increased on the average throughout Russia from 54% to 63.2%.
- In 2009 Gazprom finished the construction of 189 intercity gas lines with a general length of 3.2 thousand m, having provided 447 population aggregates in 45 regions of Russian Federation with gas supply. In whole, 65 subjects of RF will participate in gasification of RF's regions in 2010. In 2010 Gazprom plans to increase assignments on country gasification program's fulfillment by 25% (25, RUB bln.). First of all, villages will be supplied with gas. In 2009 village gasification made up 44%, by the end of 2010 this index is planned to be increased up to 45.5%.
- Because of the fact that considerable production capacities are needed to fulfill program orders, storage reserves of raw materials and finished goods, as a rule, only enterprises with an annual processing volume of not less than 6-8 KT are being invited to work on large projects.
- The most considerable changes in the Russian structure of the PE pipe market became the following: PE-100 pipe' share increase to 37% in 2009. And a swift reduce of PE-63 pipes production from 70% in 2002 to 3% in 2009 with a perspective of a further reduction to zero.

...quotations from the Report...

## 2.6 Cable extrusion



structure in RF, %

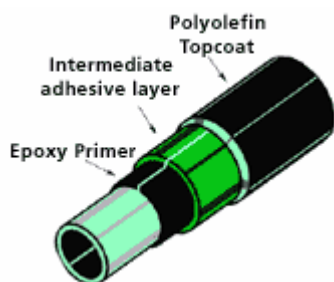


Source: Market Report

- According to our appraisals, PE deliveries in the cable extrusion sector in 2009 decreased to the level of 81 KT or 27% of 2008's capacities. The main reasons of consumption decrease in this sector became reduce of the demand for cable products in a stagnating construction branch and a stop of functioning of many programs on generating capacities modernization.
- About 83% of the general PE consumption volume in the sector of cable isolation production falls on LDPE (HDPE's share is 12%). For cable isolation production LDPE grades with MFI equal to 0.3 are used. However some Russian manufacturers use film grades in cable compositions production (for instance, 15303-003, 15803-020). In connection to this, we permit the use of LDPE film grades in the cable compositions' production.
- The main problems in cable extrusion sector in 2009 fell on PE, produced by Kazanorgsintez (38%) and Ufaorgsintez (20%). In 2008 Tomskneftehim, due to an increase of LDPE production capacities in 2007, hapenned to be on the first position in cable PE suppliers' rating.
- However, in 2009 Tomskneftehim reoriented its strategy in mastering of foreign markets, in particular, of China's market (volumes increased in 5 times there), having decreased deliveries onto the domestic market (-66%).
- Practically all large suppliers decreased their sales volumes in 2009: Kazanorgsintez (-3%), Angara Polymer Plant (-35%), Borealis (-8%). On the background of the general decrease, especially contrasting is the increase of sales volumes of the following companies: Ineos Polyolefins (32%), Dow (in almost twice), Sabic (more than in twice).
- Cable production leaders in Russia (Irkutskcable, Kamcable, Electrocable, Moscable, OCS 1, Samara Cable Company, etc.) prefer to use raw materials from Borealis Company, in particular, Visico LE 4423/Borealis.
- The largest power cable manufacturers (according to Rosstat) are presented [here](#) and communication facilities cables – [here](#).
- According to a corrected plan of energy objects substitution up to 2020 a large-scale modernization of existing generating capacities is foreseen. An implementation of 72.5 GWt of new energy capacities is foreseen, as well as a substitution of the out-of-date equipment. Large-scale construction projects (for example, a "Baltic pearl" project and "EFESk" Closed Corporation, construction's and infrastructure's development of the port in Ust-Luga), and also projects on oil fields' development (for example, Severo-Hosedayursk oil field's development) stipulate a demand for different cables, in particular, on power cables 10/220/330 kV.
- Programs on remote Russian regions' electrification, as well as railway's electrification will promote an increase of the demand for cable products. According to "RRW" Public Corporation, at the present time 42 thous. km of railway lines are electrified, which is half less than all Russian net. In the company's plans on 2010 up to 2 thous. km of railway is planned to be electrified.
- Within the last 8 years a production of power cables for a permanent installation for voltage up to 1 kV increased in 4.5 times, for voltage of 1 kV and higher – in 3.2 times and control cables – in 2.9 times.

...quotations from the Report...

## 2.7 Extrusion pipes coatings



- Up to 2007 growth rates of PE consumption in the sector of extrusion coatings were very high (on the average, they made up 48%). In 2008 this sector, on contrary, demonstrated the highest decrease rate – 36%.
- In 2009 it came back to its before-crisis volumes (about 86 KT), having demonstrated a considerable growth of 51%. Consumption in this sector grew generally at the expense of imported PE, used in this sector; and LDPE's share almost halved.
- In 2009 we observe a growth of the demand for PE in sector of steel pipes coating – 64% (up to volumes of 68 KT).
- Powerful stimulating factors became the projects of petrochemical complex, in particular, Oil-pipeline Eastern Siberia – the Pacific Ocean (ESPO). ESPO is constructed for Russian oil transporting to the market of Asian-Pacific region, the general length of the pipeline is 4188 km. Viksunsky Metallurgic Plant provides Transneft's need in pipes with diameter up to 1220 mm by 40%. In addition, a construction of an oil-pipeline ESPO-2 has begun, which will reach Kozmino Bay (Primorye Territory). In 2009 works on a construction of gas-pipeline Sakhalin-Khabarovsk-Vladivostok began, the 1<sup>st</sup> sector of which should be built by 2012.
- In 2010 a growth of demand for PE for steel pipes coating is forecast due to an active renewal of works in oil projects (ESPO-2 and Nord Steam).
- According to Rosstat, big diameter pipes production in whole in a year reduced by 14.4% up to 6 655 KT. Compared to the last year, Viksunsky Metallurgic Plant increased its PE consumption level by 58%. Volzhsky Pipe Plant processed almost 12 KT of PE, having mastered at the end of 2008 production of pipes in coating.
- The general rating of steel pipes manufacturers, according to Rosstat, is presented [here](#).
- Thus, Izhorsky Pipe Plant (Kolpino) of Severstal won a tender of Transneft on delivering of 130 KT of big diameter pipes for the pipeline ESPO-2. The plant within 2010-2011 has to deliver more than 130 thous. tons of pipes. In 2009 405 KT of big diameter pipes were downloaded from IPP.
- First line's Nord Steam pipes deliveries are performed by a German company Europipe (75%) and by Russian OME (Viksunsky Metallurgic Plant, 25%). For the second line the pipes are produced by Europipe (65%), OME (25%) and Japanese Sumitomo (10%). The general length of the gas-pipeline will make up 1220 km, a permanent inner diameter – 1153 mm, project pressure – up to 220 bar. A construction of two parallel lines with carrying capacity of 27.5 bln cubic meters a year each is planned. A carrying capacity of the gas-pipeline is about 55 bln cubic meters a year.
- In 2009 PE sales volumes were increased by almost all the main [suppliers](#): Borealis, Ineos Polyolefins, Dow, Total Petrochemicals, TPCP. One of the leaders of 2008, SK Corporation, reduced PE deliveries to this sector by 86%.
- The main supplier on the Russian market, Borealis, increased its volumes of deliveries by 86% (almost 60 KT), which is higher than 2007's deliveries, having almost revived the delivery volumes onto Viksunsky Pipe Plant. Volzhsky Pipe Plant delivered more than 11 KT of raw materials of Borealis. [Borealis](#) continues to lead in the sector with the general share of 70%.

The completion of ESPO-1 provided an increase in extrusion coatings sector by 51%.

...quotations from the Report...

## 2.9 Injection Molding




- In 2009 PE cast grades continue reducing just like in 2008. By the year's results, the decrease made up 6%.
- PE types market's structure remained the same. HDPE's share in 2009 made up about 73%.
- Today the main provider of PE cast grades on the Russian market is Kazanorgsintez (its share is about 45%). A brand PE2NT22-12, produced by Kazanorgsintez in 2008, continues mastering the market. In 2009 it possessed already 33% of the market (in 2008 – 24%).
- Official statistics give very few information about volumes of cast products manufacturing, just as about blown molding. For example, on boxes and lots this number makes up only 1 942 thous. pcs., which corresponds to HDPE consumption at the level of 4.4 KT (a reference box – 2.26kg).
- For cast products manufacturing, boxes, in particular, it's necessary to use HDPE with the following characteristics:
  - A high resistance to blow at low temperature;
  - Hardness and toughness;
  - Low sagging;
  - Low creeping;
  - A resistance to chemical matters (cleaning agents);
  - A resistance to UV-affecting.
- PE cast products consumers are hard to join in any kinds of groups. In our report we carefully examine two categories: covers and caps casting sector, as well as a sector of boxes and tare.
- By results of 2009 the largest purchases were made by the following companies: Scholler Arka Systems, Alfa-Plast, Avtoframos, Tetra Pak, "World of Packaging" (Sertolovo). Summary capacities of the purchased equipment made up 274 KT.

About 73% of consumption in PE casting sector falls on HDPE

Top-10 investments into the casting sector of Russia, 2009

Brand	Products	Equipment	Investments, USD thous.
Scholler Arka Systems			
Alfa-Plast			
Avtoframos			
Tetra Pak			
World of Packaging (Sertolovo)			
Polimex			
Polimex			
Mulmex			
Europlast			
Optimex			

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Source: Market Report

...quotations from the Report...



### 3. Domestic Production

- In Russia PE is produced by 8 enterprises. A summary real capacity by Jan,1 2009 makes up 1 641.5 KT a year. In January 2009 a PE production at Nizhnekamskneftehim was launched (230 KTa).
- LDPE is produced by 6 enterprises. A summary year capacity in 2009 made up 673.5 KT:
  - Tomsk Petrochemical Plant (TPCP) – 240 KTa;
  - Kazanorgsintez – 196.9 KTa;
  - Ufaorgsintez (Ufa) – 88.4 KTa;
  - Angara Polymer Plant (APP) – 76.8 KTa;
  - Salavatnefteorgsintez (SNOS) – 45 KTa;
  - NeftehimSevilen (Nizhnekamsk) – 26.4 KTa.
- HDPE was produced by three enterprises in 2009:
  - Kazanorgsintez, annual capacity is 510 KTa (swing);
  - Stavrolen, annual capacity is 300 KTa;
  - Nizhnekamskneftehim, annual capacity is 230 KTa (swing).
- In 2006 LLDPE started to be produced at capacities of Kazanorgsintez. A nominal production capacity on basis of gexen will make up 200 KTa (swing). Since January 2009 LLDPE and HDPE have been produced at Nizhnekamsk (230 KTa).
- In May 2010 Salavatnefteorgsintez is going to launch a complex on HDPE production with capacities of 120 KTa, and in future it's planned to increase the capacities to 200 KTa.
- In Russia there is also a single EVA's copolymer production at NeftehimSevilen with annual capacity of about 21 KTa.

Summary PE production capacities in Russia make up 1641.6 KTa

PE production capacities in Russia, KT

Manufacturer	Polymer's type	Technology	Launch year	Process	Capacities
An					
Ka					
Ka					
Ka					
Ka					
Ka					
Sa					
St					
To					
To					
Ufa					
Ufa					
Se					
Niz					
To					

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Источник: Маркет Репорт

## PE. General market indicators, MT

Indicator	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	2010 estimation	2011 forecast	2012 forecast	2013 forecast	2015 forecast	2026 forecast
Production capacities	1 113 000	1 113 000	1 121 400												
Growth, %	-	-	1%												
Production	1 010 308	1 034 201	1 066 320												
Growth, %	-	2%	3%												
Export	352 216	362 270	248 601												
Growth, %	-	3%	-31%												
Import	62 351	117 583	137 470												
Growth, %	-	89%	17%												
<b>Estimated consumption **</b>	<b>758 928</b>	<b>819 881</b>	<b>988 540</b>												
Growth, %	-	10%	21%												
Utilization of production capacities, %	91	93	95												
Exports to production,%	35	35	23												
Imports to consumption,%	9	15	14												
Supply from Belarus	38 486	30 367	33 351												
Growth, %	-	-21%	10%	2%	14%	1%	-9%	-35%	-	10%	3%	4%	2%	4%	5%

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Source: MRC

\* taking into account swing technology in Kazan and Nizhnekamskneftekhim

\*\* taking into account LDPE supply from Belarus

## PE consumption dynamics by technologies, MT

Technology	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	2010 estimation	2011 forecast	2012 forecast	2013 forecast	2015 forecast	2026 forecast	
film extrusion	392 046	396 729	488													28
Growth, %	-	1%	2													
pipe extrusion	109 527	126 471	163													5
Growth, %	-	15%	2													
blown molding	66 576	98 368	112													6
Growth, %	-	48%	1													
экструзионные покрытия	24 958	39 113	38													3
Growth, %	-	57%	-													
cabel extrusion	74 581	81 492	90													6
Growth, %	-	9%	1													
IM	71 336	57 972	70													2
Growth, %	-	-19%	2													
others	19 904	19 735	24													5
Growth, %	-	-1%	2													
<b>Total</b>	<b>758 928</b>	<b>819 881</b>	<b>988</b>													<b>76</b>
Growth, %	-	8%	2													

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Source: MRC

Dynamics of investments into PE processing by technologies. Number of complete lines

	2001	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	AAGR, 2 y, %
<b>Technology</b>											
IM	509										
film extrusion	300										
blown molding	85										
pipe extrusion	46										
cabel extrusion	1										
extrusion coating	3										
others	13										
<b>Total</b>	<b>957</b>										

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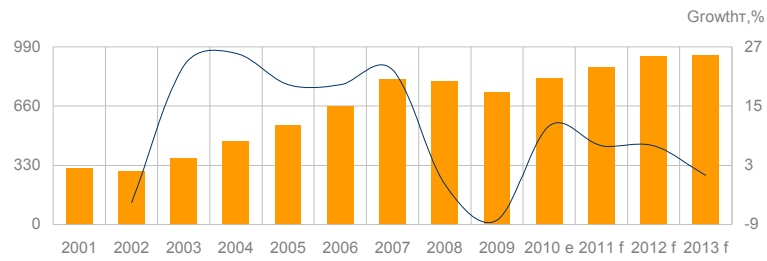


Source: MRC

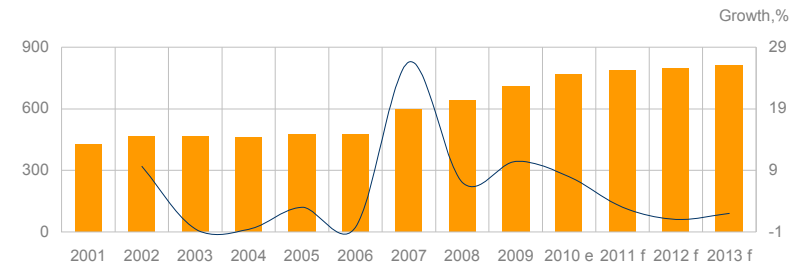


HDPE. General market indicators, KT

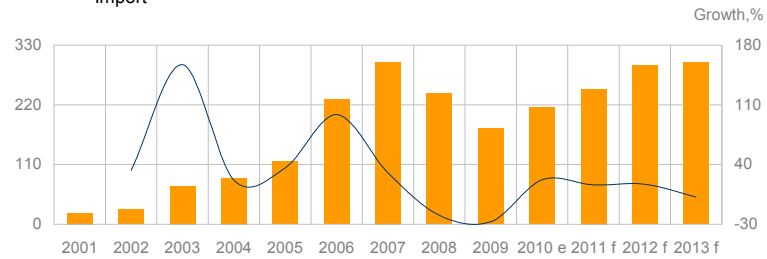
Estimated consumption



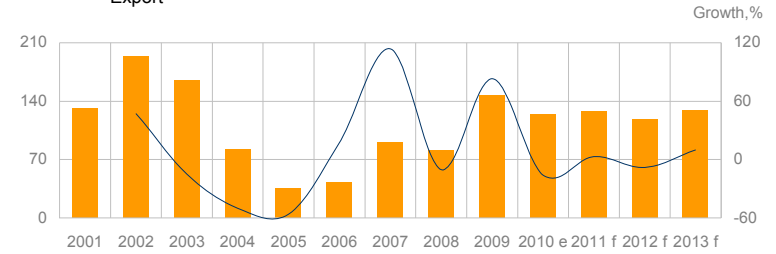
Production



Import



Export



Source: MRC

## HDPE suppliers, MT

	2001	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	AAGR, 2 y, %
<b>№</b>	<b>Manufacturer</b>										
1	Kazanorgsyntez										
2	Stavrolen										
3	Nizhnekamskneftehim										
4	Borealis										
5	Korea Petrochemical										
6	Shurtansky GCP										
7	Ineos Polyolefins										
8	LyondellBasell										
9	Total Petrochemicals										
10	Daelim										
11	Sabic										
12	TVK										
13	LG Chem										
14	Unipetrol										
15	Samsung Total										
16	Chevron Phillips										
17	Dow										
18	Honam Petrochemical										
19	Thai Petrochemical										
20	Exxon Mobil										
21	others										
-	<b>Total</b>										

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Source: MRC

LLDPE consumption structure by suppliers, %



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Source: MRC

Film extrusion: PE supply analysis, MT

	2001	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	AAGR, 2 y, %
<b>Indicator</b>											
processing capacities	301 18										
Growth, %	-										
domestic supply	351 49										
Growth, %	-										
Import	20 74										
Growth, %	-										
<b>Estimated consumption</b>	<b>372 23</b>										
Growth, %	-										
Imports to consumption,%	6										

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Source: MRC

Film extrusion. Blown films: PE grades rating, MT

	2001	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	AAGR, 2 y, %
<b>№ grade/Manufacturer</b>											
1 293-285Д/Kazanorgsyntez	5 130	5 518	11 654	16 515	22 068	18 481	21 276	18 413	65 750	22%	76%
2 10803-020/Kazanorgsyntez											
3 10803-020/Ufaorgsyntez											
4 15803-020/Ufaorgsyntez											
5 15813-020/Kazanorgsyntez											
6 10803-020/Angarsk Polymers Plant											
7 15803-020/SNOS											
8 80Б-285Д/Kazanorgsyntez											
9 15803-020/Polymir											
10 15803-020/Tomskneftechem											
11 ПЭНТ18-11/Kazanorgsyntez											
12 10803-020/Polymir											
13 15803-020/Sevilen											
14 Exceed 1018EB/Exxon Mobil											
15 Borstar FB2310/Borealis											
16 F-0320/Shurtansky GCP											
17 Dowlex NG 5056.01G/Dow											
18 F-Y346-A/Shurtansky GCP											
19 Exceed 1018CA/Exxon Mobil											
20 F-0120/Shurtansky GCP											
21 others											
- <b>Total</b>											

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Source: MRC

Film extrusion. Multi-layer fillms: Top-20 converters in terms of investments into equipment. Cost of production line, USD thous.

	2001	2002	2003	2004	2005	2006	2007	2008	2009	Total	Share
<b>№ Converter</b>											
1 Lava, Group											
2 Polimer, Desnogorsk, Group											
3 Em-Plast											
4 Paketti-Grupp											
5 Uralplastik, Group											
6 Slavich, Group											
7 PKF Siluet, Group											
8 Souz-Polimer, Group											
9 Plastik, Dzerzhynsk											
10 Tiko-Plastic											
11 Polimer, Samara											
12 Artplast-T											
13 Multiflex											
14 Polimerbit, Group											
15 Himpek, Group											
16 Vismut											
17 Dar											
18 Sedon, Group											
19 Sild Eyr, Group											
20 Zagorsk experimental plant of plastic materials											
21 others											
- <b>Total</b>											

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Source: MRC

Blown molding: TOP-20 Equipment suppliers. Number of complete lines

	2001	2002	2003	2004	2005	2006	2007	2008	2009	Total	Share
<b>Equipment suppliers</b>											
Magic MP											
Zhejiang Honghua Machinery											
Bekum											
SMC											
SIG Blowtec											
IMG Plastec											
Automa											
Blasautomat											
Demak Plastik Makina											
Dae Chang Machinery											
Kai Mei Plastic Machinery											
Huasheng Machinery											
Uniloy Milacron											
Yelkenciler Makina											
Umit Makina											
Melitopolprod mash											
ChodosChodov											
Polimer mash											
Ozkan Plastik											
Soplar											
others											
<b>Total</b>											

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Source: MRC

PE production by producers in the previous year, MT

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Share
<b>№</b>														
<b>Manufacturer</b>														
1	Kazanorgsyntez													
2	Stavrolen													
3	Tomskneftechem													
4	Nizhnekamskneftehim													
5	Ufaorgsyntez													
6	Angarsk Polymers Plant													
7	SNOS													
8	Sevilen													
-	<b>Total</b>													

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Source: MRC



PE producers rating, MT

	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	AAGR, 2 y, %
<b>№</b>	<b>Manufacturer</b>								
1	Kazanorgsyntez								
2	Stavrolen								
3	Nizhnekamskneftehim								
4	Borealis								
5	Ufaorgsyntez								
6	TOMSKNEFTECHEM								
7	Dow								
8	Angarsk Polymers Plant								
9	Korea Petrochemical								
10	SNOS								
11	Shurtansky GCP								
12	Exxon Mobil								
13	Ineos Polyolefins								
14	Polymir								
15	Sabic								
16	Sevilen								
17	LyondellBasell								
18	Total Petrochemicals								
19	Daelim								
20	Hyundai Petrochemical								
21	TVK								
22	LG Chem								
23	DuPont								
24	Samsung Total								
25	Unipetrol								
26	Chevron Phillips								
27	Henkel								
28	Honam Petrochemical								
29	DEXPlastomers								
30	Polimeri Europa								
31	Thai Petrochemical								
32	Hanwha Corporation								
33	Braskem								
34	Ampacet								
35	Sharq								
36	Fujian								
37	Tosaf								
38	SK Corporation								
39	Titan Petrokimia								
40	Marun Petrochemical								
41	others								
-	<b>Total</b>								

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Source: MRC



Borealis

PE domestic supply by types, MT

	2001	2002	2003	2004	2005	2006	2007	2008	2009	AAGR, 5 y, %	AAGR, 2 y, %
--	------	------	------	------	------	------	------	------	------	-----------------	-----------------

**№ Вид продукта**

- 1 LDPE
- 2 HDPE
- 3 LLDPE
- 4 copolymer
- 5 EVA
- 6 others
- **Total**

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PE domestic supply by techno

**№ Technology**

- 1 extrusion coating
- 2 cabel extrusion
- 3 film extrusion
- 4 blown molding
- 5 IM
- 6 pipe extrusion
- 7 others
- **Total**

PE domestic supply by grades

**№ Grade**

- 1 Borcoat HE 3450
- 2 Visico LE 4423
- 3 Borcoat ME 0420
- 4 LE4205R
- 5 Borstar FB2310
- 6 Borstar FB4370
- 7 others
- **Total**



Source: MRC



# Common information

## About us

Market Report was founded in 2003. Our purpose is giving the most professional information on petrochemical markets of Russia, CIS and East European countries.

Today Market Report prepares regular market reports on markets of polyethylene, polypropylene, PVC and polystyrene. In addition, our analysts possess information about markets of additives, films, pipes, window shapes and auto components.

## Our clients

Top-50 world's petrochemical companies trust us, the summary sales volume of which exceeds Russian GDP's level in more than twice.

For instance, our clients are: Anwil, Akzo Nobel, Arkema, LyondellBasell, BASF, B&B, Chemopetrol, Ciba, Clariant, Commerzbank, Dow, DuPont, ExxonMobil, LG Chem, Mitsubishi, Mitsui, Milliken, Nexant, Itochu, NKNH, Nubiola, Polimeri Europa, R&H, Samsung, Solvay, Shin-Etsu, Total Petrochemical, TVK, Huhtamaki, Luccoil-Neftehim, Sibur, Sayanskhimplast, Plastkard, BashHim, Kazanorgsintez, Tatneft and others.

## Reports

Today Market Report publicizes about 1500 reports during a year. Our products portfolio includes:

- Annual reports;
- Weekly price reports;
- Monthly reports;
- DataScope;
- ScanPlast;
- PlastGuide;
- Prices forecast;
- Top-50;
- Special projects.

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## New Reports

We are happy to present a new Annual Report, which, as we believe, is unique in the world practice. We spent nearly four years to develop a new format of our Annual Reports. We did our best to cut down the text part of the Report to save your time, and to present the most important considerations (bullets) generated independently by our analysts. We have begun to use hyperlinks that allow you to "travel" through the Report not being afraid of getting lost somewhere in the great number of data and figures.

## How our reports differ from others

You probably have already got used to our **annual reports**, and you remember that they differ from similar products in the most comprehensive coverage of data. However, for the recent two years we have been observing an increasing pressure on the part of "analysts" who have been spreading data on the CIS polymers market being fully confident that, having offered general figures out of customs databases, they would get a comprehensive analysis of the market. To waive any questions as to the quality of our data, MRC's specialists developed conceptually new annual analytical reports, which, as we believe, are unique in the world practice. We have been working hardly for four years to create a brand-new format of annual reports. The slogan of our new annual reports is "As detailed as it can be". The point is that this is probably for the first time in the world practice when a polymer market of a single country is described so minutely.

## Information system used to prepare our Reports

Today, we use about 120 directories that, for example, include:

- 26 polymers processing technologies and associated products
- 66 processing sectors of polymers and associated products
- 240 types of finished goods made of polymers
- 4025 grades of polymers (8 analysis aspects)
- 165 producers of polymers (5 analysis aspects)
- 2560 brands of equipment (analysis by 6 parameters, including output capacity of each line), operated by domestic converters since 2000;
- 450 world equipment manufacturers, whose equipment has been used by domestic converters since 2000;
- all postal codes in the Russian Federation (to define postal addresses of each company in our Report);
- financial and production figures by nearly 20 thousand companies (converters, traders and other firms), working in the CIS polymers market, by more than 20 activity categories (see also PlastGuide Project).


## Data Analysis draws up reports automatically


Today, absolutely all diagrams and tables in our annual reports are being made automatically. Each analyst of MRC uses the software product "MRC: Data Analysis", which helps draw up data for an annual report within a few minutes. The software has been developed by the team of MRC's specialists under the general direction of Professor Basmanov E.A., Doctor of Engineering Science.

Today, Data Analysis includes uniform processing of all fragmented data, which are used to understand operations of each converter in every single market of polymers. Generally, before presenting our conclusions in the annual report, our analysts do a lot of work in the course of the year and, nearly every day, they process the following data:


- production of polymers by each polymer grade of each domestic producer;
- production of finished goods made of polymers by each producer, as well as by type of finished goods, sector and processing technology;
- import of finished goods made of polymers by each foreign producer, each type of finished goods, sector and processing technology;
- export of finished goods made of polymers by each exporter, each domestic converter, by each type of finished goods, sector and processing technology;
- import of polymers by each foreign producer, each domestic trader, converter, processing technology, processing sector, type of finished goods, type and grade of polymer;
- export of polymers by each domestic producer, domestic trader, polymer type, and polymer grade;
- carriage by rail by each domestic producer, domestic trader, converter, type of polymer, grade of polymer, processing technology, processing sector and type of finished goods;
- import of equipment to produce finished polymer goods by each brand of equipment, each equipment producer, domestic converter, processing technology, processing sector and (if possible) each type of finished goods;
- ownership of each converter to determine associated companies; if needed, to regard a converter as a group of companies;
- financial indicators, of both an individual converter and his affiliated structures;
- operations with key suppliers of raw materials and supplies.

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