



Polypropylene in Russia 2009

573 Companies

344 Diagrams

371 Tables

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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.

The Report contains the general classification of polypropylene: Homo, Impact, Random and other propylene copolymers. There is detailed analysis of trends in PP consumption in the following sectors: fibers and filaments, injection molding, films, pipes, sheets, etc. For each consumption market we have prepared mini-reviews describing the development history and the current market trends. We have also provided detailed information on investments into PP processing equipment in the context of sectors and individual processors. There is in-depth analysis of data on end consumption, domestic production, import and export of polypropylene (by PP types, processing sectors, producers and PP brands).

You will also be able to find answers for the following questions, in our Report:

- *What was PP consumption in Russia in 2008? What are market growth outlooks till 2026 inclusive?*
- *What was the level of investments into PP processing equipment during 2000-2008?*
- *Which PP processing sectors are growing faster than the market on the whole? Why?*
- *What is the volume of output, exports and imports of finished goods made of PP: big-bags, bags, cast films, BOPP films, bumpers, accumulators, furniture, etc.?*
- *What are the perspectives for domestic automobile components producers? Why Kursk Accumulator Plant is increasing output in spite of the crisis?*
- *Slavros Geosyntetika’s challenging project. What are the perspectives of agro- and geo-textiles in the Russian market?*
- *Will it be possible to provide converters with high-quality feedstock after the launch of the Tobolsk project?*
- *Which PP suppliers have increased their market shares, and which, contrariwise, have lost their positions?*
- *Why PP imports were high in 2008 in spite of the launch of capacities in Nizhnekamsk and Budennovsk? Which grades are imported? Into which sectors?*
- *Biaxplen. Monopolization of the Russian market or orientation toward European markets?*
- *Which markets will be affected by the economic crisis the most heavily? Which markets will contrariwise strengthen their positions?*
- *Economic crisis. Will PP production projects be implemented fully? Which of them are the most realizable?*
- *Equipment of which producers will be in the greatest demand in the sector of automobile components?*

Report Statistics: 532 pages, 366 tabelle, 344 diagrams,
131 870 words, 573 mentioned companies.

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Contact: info@mrcplast.com

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249. Kursk Accumulator plant
250. Kurskhimvolokno Ltd.
251. Kurskhimvolokno, Group of Companies
252. Kuskovskiy Chemical Plant
253. Kuzbaselement
254. Kwang Tong
255. La M Plast
256. Lada-Farm
257. Lakor-Plastik
258. LG Chem
259. LG Electronics Rus
260. LG Rus, Group of Companies
261. Liansu Machinery
262. Lignatek
263. Likofleks, Spb
264. Linos
265. Linpac Plastics
266. Lin-Pack
267. Livnyplastik
268. LK Impuls
269. Logistics Company Ochakovo
270. Lohia Starlinger
271. L-plast
272. LS Mtron
273. Luigi Bandera
274. LyondellBasell
275. Macro Engineering
276. Magna Tehnoplast
277. Matila Industrial
278. Meccaniche Moderne
279. Megaplast
280. Mega-Plast, Group of Companies
281. Mensen Packaging CIS
282. Merinos Hali
283. Metaplast OOO
284. Mettem-Tehnologii
285. Midget Cars Plant
286. Mir Upakovki, Group of Companies
287. MNPZ
288. Montazhgazspecstroy
289. Montech
290. Moscow Refinery
291. Moscow Refinery, Group of Companies
292. Motor-super
293. MPKF Alkor
294. M-Plastika
295. MTLK
296. Multiflex
297. Multi-Pack
298. Nan Rong Mechanica
299. Nefis Kosmetiks
300. Negri Bossi
301. Netstal Maschinen
302. Neumag Zweigniederlassung
303. Newera
304. NIHHIT-2
305. NIITHIT
306. Nikiforov
307. Ningbo Haitian
308. Ningbo Liguang Machinery
309. Ningbo Shuangma Machinery
310. NIO Sibur-Tomskneftehim
311. Nitek-Plast
312. Nizhegorodskiy Automobile Components Plant
313. Nizhegorodskiy Plastics Plant
314. Nizhnekamskneftechem
315. Nizhnekamskneftehim, Group of Companies
316. Nizovskiy Furniture Factory
317. Nomateks, Group of Companies
318. Nonwoven Materials Manufacturing
319. Nord
320. Novoplast
321. Novatek, Group of Companies
322. Novatek-Polymer
323. Npo Rostar
324. NPP Interplast Trade
325. NPP Mayak-93
326. Npp progress
327. NTL Upakovka
328. Oboronsnabsbit
329. Odincovskaya Komus-Upakovka Factory
330. OJSC PLASTPOLYMER
331. Okean Plant
332. Okerlund & Rauzing Kuban, Group of Companies
333. Olmas
334. Omsl Pipe Insulation Plant
335. Ormos-polimer
336. Orotex
337. Ostendorf Kunststoffe
338. Pacific Machinery
339. Packaging Factory
340. Padana
341. Perint, St. Petersburg
342. PET.RUS
343. Petkim
344. Petropolimer
345. P-Group Deutschland
346. Pilsa-Plastik
347. PIO Kunststoffe
348. Pipelife
349. Pipelife Rus
350. PK Propleks, Group of Companies
351. PKF Polimer
352. PKF Sadko
353. PKhR
354. Planeta-Center
355. Plastic Goods plant, Tayshan, China
356. Plastics Plant, Kopeysk
357. Plastics Processing Plant named after Komsomolskaya Pravda
358. Plastik, Angarsk
359. Plastik, Bryansk
360. Plastik, Chelyabinsk
361. Plastik, Dzerzhynsk
362. Plastika-Tumen
363. Plastikom, Group of Companies
364. Plastikor
365. Plastkon
366. Plastpolimer
367. Podolsk Accumulator Plant
368. Polad, Tolyatti
369. Poleks, Group of Companies
370. Polikont
371. Polimer Kemerovo
372. Polimer, Orenburg
373. Polimer, Uzlovaya
374. Polimerbit, Group of Companies
375. Polimer-Kompaund, Group of Companies
376. Polimerkonteyner
377. Polimerkonteyner Ltd.
378. Polimerkonteyner, Novomoskovsk, Group of Companies
379. Polimer mash
380. Polimer-Produkt, Balakovo
381. Polipak, Stavropolskiy kray
382. Poliplast Chelyabinsk
383. Poliplast Lugansk
384. Poliplastik, Group of Companies
385. Polipropilen, Group of Companies
386. Politek PTK
387. Politek, Group of Companies
388. Polyform
389. Polymatiz
390. Polymer Complex
391. Potencial, Kozmodemyansk
392. Prime Polymer
393. Pro Aqua
394. Production Cooperative Chemical Plant Luch
395. Progress Plant, Group of Companies
396. Promishlennaya Upakovka
397. Propilco
398. Qingdao Plastic Machinery
399. Queens Machinery
400. Raflatrac
401. Real Plast
402. Refrigerator Plant Birusa
403. Refrigerator Plant Stinol
404. Regent, Group of Companies
405. Reifenhauer
406. Retal Trade
407. Retal, Group of Companies
408. Rezerv-servis
409. Roger Vanden Berghe
410. Rompetrol
411. Rosa Service
412. RosanPak
413. Rost, Kazan
414. Rosturplast
415. Rotopak Matbaacilik
416. Roza Hali
417. RPC TEDECO
418. Rusformplast
419. Ruvinil
420. Sabic
421. Sacmi Imola
422. Sam-AC & I Corporation
423. Samara-Sintez
424. Samsung Total
425. Sandretto
426. Saransk TV-sets Plant
427. Saransk TV-sets Plant, State Unitary Enterprise of the Republic of Mordoviya
428. Sayansk Dairy
429. SD-Plast
430. Sealed Air
431. Sealed Air, Group of Companies
432. Selena, Group of Companies
433. Selena-himvolokno
434. SEPO-ZEM
435. Sequest Closures
436. Sergo Plant
437. Sergo Plant, Group of Companies
438. Setka
439. Sevilen, Group of Companies
440. SFM Hospital
441. Shanghai Jwell Machinery
442. Shantou Chaonan
443. Shantou Hing Wo Hing
444. Shantou Lianke Industry
445. Shan Tou Lianke Industry
446. Shantou Machinery
447. Shenzhen
448. Shenzhen Nanshan
449. Shenzhen Xiangpengda Trade
450. Sholler Arka Systems
451. Sibur-Neftehim, Group of Companies
452. Sibvolokno
453. Sica

454. SIG Blowtec
 455. Silon A.S.
 456. Sinopec
 457. Sintez, St. Petersburg
 458. Sirmax
 459. SK Corporation
 460. Skalyariy-L
 461. Slavich, Group of Companies
 462. Sloznaft
 463. SMI
 464. SML Maschinengesellschaft
 465. Soda
 466. Softer
 467. Solnechnogorsk Europlast Plant
 468. Soplar
 469. Soyuzpromplast
 470. Spako, Group of Companies
 471. Spektr Ltd.
 472. Starlinger
 473. Stavrolen
 474. Step Pazl
 475. STL Ekstruziya, Group of Companies
 476. Stok logistik
 477. Stroyplastmass-SP
 478. Stroypolimerprogress
 479. Stroypolymer
 480. Sumitomo
 481. Sundirskoe Repair and Technical Enterprise
 482. Sverdlovskiy Instrumentalnyi Zavod
 483. Synthetic Fibre Plant
 484. Taejin Machinery
 485. Taiwan Polypropylene
 486. Talickie polimeri
 487. Tarkett
 488. Tarkett, Group of Companies
 489. Technoplast
 490. Technoprominvest
 491. Tehprominvest
 492. Telebalt
 493. Telemart Consulting Limited
 494. Tenchem
 495. Termafleks Izolyaciya+
496. Termoplastavtomat
 497. Termoplastavtomat
 498. Tetra Pak, Group of Companies
 499. Thai Petrochemical
 500. Theyson Extrusionstechnick
 501. Tomskneftehim, Group of Companies
 502. Torgoviy Dom Lukoyl
 503. Torplast
 504. Total Petrochemicals
 505. Tovary Budushchego
 506. Toyo
 507. Toyota Boshoku
 508. Trehgorniy plastik
 509. Treofan
 510. Tria
 511. Truboplast-A
 512. Trusioma
 513. Tubofleks, Uglich
 514. Tumen Medical Equipment and Instruments Plant
 515. Tumensetsesnast
 516. Tupperware
 517. Turkmenbashy Refinery
 518. Tverskoe Himvolokno
 519. TVK
 520. TW Packaging
 521. Tyumen Accumulator Plant
 522. Ufaneftehim, Group of Companies
 523. Ufaorgsyntez
 524. Ukrplastik
 525. Ulyanovsk Automobile Plant
 526. Unifol
 527. Uniloy Milacron
 528. Union Crystal
 529. Unipetrol
 530. Uniplast
 531. Uniplast Knauer
 532. Uniplast-Rostov
 533. Upaks-Uniti
 534. Uralelement
 535. Uralplastik
 536. Uralplastik, Group of Companies
537. Uralplasttara
 538. Uzhuralpak
 539. Velicoluksky accumulator plant
 540. VEM
 541. Verhnerusskoe-santehkomplekt
 542. Vesta
 543. Vestel-SNG
 544. Vestprom, Zlinka
 545. Veyner Plastik
 546. Vinnolit
 547. Vir Plast
 548. Virken-Rus
 549. Vismut
 550. Vladipak
 551. Vodpolimer
 552. Volkswagen Rus
 553. Vonabelk
 554. Wavin
 555. Wavin-Rus
 556. Weber
 557. Weiner Plastic, SPb
 558. Wimm Bill Dann, Group of Companies
 559. Windsor Kunststofftechnologie
 560. Wittmann Kunststoffgerate
 561. Workmate Packaging
 562. Wuxi
 563. Xinxing Twin Screw Machinery
 564. Yancheng Machinery
 565. Yantai Kueni Plastic Machinery
 566. Yantarniy Polimer
 567. Yao Ta Machinery
 568. YongMing Machinery
 569. Youngin Engineering
 570. Zhangjiagang Beier Machinery
 571. Zhangjiagang Fanchang Machinery
 572. Zhejiang Honghua Machinery
 573. Zhejiang Jinhai Plastic Machinery

10 reasons to use this Annual Report

- 1) If you take statistics of production of finished goods made of PP as a basis, then, unfortunately, your assessments of individual processing sectors are going to be incorrect in principle. The Federal State Statistics Service of the Russian Federation does not take into account production of PP films by many large producers. There is a similar situation with production of polymer pipes. The Federal State Statistics Service takes into account processing volumes of only 128 film producers and 42 polymer pipes producers. At the same time, the Federal State Statistics Service does not take account of production figures of the largest producers (particularly, there are no data on production of PP pipes by Eurotrubplast Holding in 2007; official statistics do not provide any information on production of packaging at P&G or WBD, either; and there is a long list of such examples). The situation with official statistics on the injection molding market is simply **catastrophic**. They record output volumes of only one tenth of producers. Taking into account the aforesaid, our data on PP consumption by processing sectors essentially **differ** from all those published on the market.
- 2) Indeed, in accordance with commonly used reports, about 24% in the structure of overall PP supply belong to the packaging sector, 22% refer to the sector of films, and nearly 21% are covered by the mysterious sector of cultural and household goods. Can this structure be used to define PP processing technologies applied in the market? No, inasmuch as films can equally be included into the sector "Packaging and Wrapping Materials" as well as into the sector "Cultural and Household Goods". The same, for example, refers to molded boxes or caps for PET bottles or to cosmetic bottles made with the help of EBM technology. Can this classification be used to tell PE, PP suppliers which grades and for which sectors (or, at least, with which MFR) should be offered to the market?
- 3) Not to delude players in the Russian polypropylene market, we collected detailed statistics on PP supplies by all producers, operating in the Russian market, by each PP grade. We analyzed sales of all PP grades available in the Russian market over the course of the recent nine years. If data on imported grades can theoretically be collected, then the product mix of **Russian polypropylene producers** can be found only in our Report.
- 4) Having collected summarized data on sales of specific PP grades, we were able to assess PP consumption volumes in each processing sector with greater accuracy. The data we obtained on production of films in Russia differ nearly two times from official statistics.
- 5) We studied PP traders' sales and focused on end polypropylene **converters**. For that we used more than a dozen of different sources of information, including detailed statistics on foreign-economic activity, production, financial indicators and inland transportation in the Russian Federation.
- 6) Major difficulties arose when we analyzed supply of equipment to each PP processing sector. It was especially difficult to distribute molding machines since they can also be used to process PE, PVC, HIPS, GPPS, ABS, etc. Distributing molding machines by polymers, we adhered to several criteria: converter's sphere of business, brand of a molding machine and producers' application instructions. As a result, each molding

We suggest using PlastGuide to analyze business activities of each converter

Our Annual PP Report have 10 advantages over official state statistics

machine was identified to each producer related to either one or another processing sector, which, in its turn, was related to either one or another PP grade.

Separately, we made up the rating of the most significant [investments](#) made by converters. Accordingly, dynamics of capital investments into equipment demonstrate possibilities of further growth of each PE processing sector in the Russian Federation.

- 7) Each processing sector contains [ratings of converters](#), made up on the basis of our own assessments of PP consumption, as well as ratings of [sales](#) of each PP grade by each technology, and, when needed, by processing sectors. That was done to define, which PP grades are in great demand in the Russian market in each business segment today, as well as to understand how to form your grade mix in each segment in the most efficient way.
- 8) Reasoning from data on investments into PP processing, as well as using statistics on inland transportation in Russia, we made up a complex picture of PP processing development in each region of the Russian Federation.
- 9) We also described general PP market development trends both in the world and in each region using assessments of the leading world analytical companies such as [CMAI](#), [Nexant](#) and [Townsend](#). Furthermore, we analyzed price dynamics over the course of 2004-2008, using data of [ICIS](#) and [Platts](#), as well as our own data from [Price Reports](#).
- 10) One of the results of the unbiased analysis is our own forecast of potential projects on expansion of PP production capacities in Russia till 2026, as well as assessment of projects that are most likely to remain on paper.



METHODOLOGY

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](#).

Data Analysis

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

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.

Data Sources

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.

Hyperlinks

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 PP grades:

- PP-Homo
- PP-Impact
- PP-Random
- Copolymers
- Other propylene copolymers;

We adhered to general Foreign Trade Codes just partially, since actual imports of PP 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, HB306MO of Boreails is PP-Homo, though buyers may be inaccurate and indicate it as PP-Impact.

Customs Duties

The total import duty on PP by all Foreign Trade Codes of Group 3902 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 PP processing technologies that are generally accepted in the world:

- Fibers & Filaments;
- Injection Molding;
- Films extrusion;
- Sheet Extrusion;
- Pipe Extrusion;
- Compounding;
- others.

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 PP bags cutting were based production capacities, the so-called primary PP 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 26 processing sectors to analyze the PP market.

Injection Molding

- Car components
- Batteries
- Recreational goods
- FurnitureMedicine
- Footwear
- Packaging
- Fittings
- Household goods
- Electrical goods

Fibers/Filaments

- Hygienic materials
- Nonwovens
- film thread

Film extrusion

- BOPP films
- CPP films
- Tape
- Cast
- Blown
- Packaging

Sheet extrusion

- Car components
- Construction
- Packaging
- Electrical goods

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/pharmaceuticals
- 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

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-Volgoigradorgsyntez – 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...

2.2.1 Injection Molding

- The sector of molded goods includes a number of big segments: production of furniture, caps for PET packaging, automobile industry, production of accumulators, medical goods, electric household appliances and others. The “Other” includes the rest of goods made of PP. There are the following groups of products: pallets, flowerpots, goods for animals, etc. For more detailed information, please, refer to the respective section. No one can estimate consumption of polypropylene in these sectors more or less precisely. This, first of all, is conditioned by a big number of small market players, and it is absolutely impossible to collect statistics by these companies. Many big players also produce such goods; at the same time, their share in the overall output structure does not exceed 5%. Secondly, Russian manufacturers use secondary granulate in the production of almost all these goods.

Car components

- Total investments of capital in car components production in 2008 were equal to more than 19.5, USD mln.
- One of the main trends of the world automobile industry is the production of bigger volumes of plastic components. High mechanic properties, lightness, universality in design, good aesthetic properties, and resistance to various impacts attract designers and manufacturers. There, the first place in terms of consumption and weight per automobile belongs to the “king of plastics – king of roads” – polypropylene (PP). According to European researches, about 60 kg of polypropylene are used in one automobile. At the same time, it is quite obvious that the automobile industry sets up high requirements to materials, and only a few suppliers may offer high-quality products. The majority of leaders of the world automobile industry prefer PP compounds made by European companies

About 60 kg of PP are used in a modern car

Application of polymers in VAZ automobiles, kg

	ABS	PA	PE	PP	PU	PVC	ABS+PS	Other
Model								
VAZ 21099	12.8	2.5	1.6	8.1	20.6	2.5	6.9	1.3
VAZ 21100	9.43	5.9	1.9	38.2	20.6	3.9	13.6	3.4
VAZ 1118	2.64	7.5	0.5	41.9	15.4	1.8	3.6	2.2
Lada Priora	2.44	12	3.2	50.3	17.4	1.3	2.5	4.3
Lada Kalina	1.1	7.2	2	53.6	16.3	2.9	3.7	4.4
Renault Logan	1.2	8.8	10.8	45.5	16.6	0.2	0.8	6.2

Source: AutoVAZ

- Today, PP is used in the production of bumpers, front and rear trimming, impact absorber, shock dampers, bumper bars, as well as in interior trimming (moldings, door finish, rear-view mirror housing, sills, air diffusers, case-shaped panels, wheel caps).

On average they use about 9 kg of polypropylene to make a bumper. A detail that “takes an impact upon itself” directly and figuratively shall meet a great number of requirements, i.e. materials shall meet high requirements as well. Above all, these are mechanical properties, rigidity and impact resistance in a wide range of temperatures, perfect thermal properties, manufacturability, aesthetic qualities (gloss, absence of scratches and stains), dyeability, resistance to ultraviolet radiation, and low density.

No less serious requirements are set up to the production of moldings and sills. The material shall also have high flow rates, low density and a very low rate of linear thermal expansion, no stains, as well as a “metallic” effect.

The use of polypropylene gives perfect opportunities in production of front panels (control board, holders, casings) and interior finish of automobiles (support components, consoles, door panels, seat components). On average, about 5.5 kg of PP are used in the production of a control board, and about 15 kg are used in the production of other components of interior finish.

- After the collapse of the Soviet Union, the fleet of cars in Russia increased more than three times, up to 28.2 mln. in 2006. Its annual growth rates constituted on average more than 12%. For reference: in the countries of Eastern Europe – 5.4%, in Western Europe – only 2%. By the precrisis evaluation WSJ, Russian motorcar market in 2009 had to become the largest in Europe.
- All around the world car industry experiences the deepest crisis, its last proof: Daimler's holding of blocking stock sale to Arabian investment funds, and also the bankruptcy of Plastal – one of the largest European car components manufacturers. In Russian car components sector the situation's restoration is expected not earlier than by 2011. Though some good capitals from world's car manufacturers (GM, Ford, Toyota, VW) have been already invested into this sector, plus car components suppliers are starting to come out on the market (in January 2009 bought business of Nizhegorodsky car component manufacturer “Technoplast”).
- In 2008 general production of motorcars in RF increased in 13% (up to 14.7 mln. pcs.). In 2009 they expect a considerable motorcars sale decrease. It's nice to know that there are companies that enlarge their car component businesses. Thus, Kursky accumulator plant got an approval for their production delivery to GM plants, and Fiat company let them deliver accumulators from Kursk to all its plants.
- One of the ways out of the crisis situation for domestic manufacturers can be partial production's reorientation to car components production for the secondary car market.
- VW and Ford can become “Russian cars”. Increase of Russian-made car components share at VW and Ford plants in Russia will lead to the fact, that indigenously Russian “Zhiguli” will not be able to compete with foreign cars that were made in Russia. Let's assume that at the difference between prices for Russian Ford and “Zhiguli” that equals to 20, Rub thous., a consumer will prefer the first one.
- A program has been accepted by AvtoVaz, according to which compounds and PP will substitute expensive parts, made of PC and ABS. First of all such total substitution will be preformed on new models LADA KALINA and LADA PRIORA. In program's developers' mind it is PP that is the most acceptable engineer plastic for AvtoVaz.

Car components business will be based on
PP compounds

...quotations from the Report...

2.2.2 Fibres and filaments



Profitability of PP bags production is below 10% now

- The Russian sector of fibers and filaments is the second one in terms of polypropylene consumption. The polypropylene consumption constituted [177.56 KT](#) in that sector in 2008
- During 2000-2008, the polypropylene consumption in the sector was growing in average by 22% a year. In 2009, according to our appraisals, PP consumption here will reduce in the connection with the global crisis and won't exceed the point of 11160 thous. tons. Historically, Russian manufacturers have been the main suppliers of polypropylene used in the production of fibers/filaments. During the recent years, due to increasing domestic prices for Russian polypropylene, there increased import of PP from other countries, first of all, from Turkmenistan, such situation remained up to 2007. With the introduction of PP production capacities in Nizhnekamsk, domestic PP share in filaments/fibres sector grew from 62% in 2006 to [78%](#) in 2008.
- There are about 70 enterprises manufacturing nonwoven materials now in Russia; at the same time, the majority of them use the aforementioned classical scheme – they produce NM from staple polypropylene and polyether fibers (the latter prevail). The leading Russian enterprises in this sector are OJSC “Komitex” (Syktyvkar), “Nomatex” Ltd. (Novaya Mayna), “Sibur-Geotextile” Ltd. (Surgut) and CJSC “Holtex-Auto” (Moscow); at the same time, “Komitex” has an incontestable advantage both in terms of output volumes (more than 50% in Russia), and in terms of the product mix as well.
- Low level of big-bags consumption in Russia was conditioned by a number of reasons. The main reason is the high cost of soft containers. However, according to market players, today, for example, the cost of soft containers for packaging of salt in the prime cost of finished products does not exceed 3%. The second reason is not less important: many consumers of, say, mineral fertilizers, do not have material base in order to accept goods packed in soft containers. For instance, practically all farms in the country are not able to accept fertilizers packed into soft containers due to lack of handling base. The third reason is the total lack of shipping railroad cars allowing transportation of products packed into big-bags. Due to that practically 98% of products are transported by bulk railroad cars, i.e. loaded in bulk.
- Enterprises manufacturing mineral fertilizers consume 23% or 180 mln. PP bags per annum. The sugar industry consumes 16% or 130 mln. pcs. a year.
- In 2008 one of the largest molded fabric manufacturers, the Israeli Company Avgol launched in Tulskaaya oblast (Uzlovskoy region) a thermofastened spunbond production. The enterprise's capacity is about 10 thous. tons of spunbond per year. One of the main directions of marketing is agrotextile. Nowadays there has been invested more than 1, Rub. bln. into the spunbond production. The company plans a launch of the second spunbond production line in future; that will enable the enterprise's capacities' increase up to 20 thous. tons a year. The main sales regions are Povolzhsky and Southern regions of Russia. The agrotextile is offered under the trademark Agrospun.

Production of chemical fibres and filaments moved at 127.7 KT in Russia in 2007

- The rating of sales of polypropylene brands in the sector of fibers/filaments is presented in [Table](#)

	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %
# Brand / Producer								
1 PP 1550J/Niz								129%
2 Balen 0103								18%
3 Caplen 010								0%
4 21030-16/ T								8%
5 TPP D30S/								-18%
6 Lipol A10 7								-10%
7 PP 1035-08								-
8 Turkmenple D382BF/Tu								-33%
9 Moplen HP								-
10 Capilene T								-
11 PP1365S/M								-
12 PP1362R/M								-
13 Balen 0113								18%
14 Kaplen 011								0%
15 Achieve 38								-
16 Lipol A4 71								3%
17 PP3546G/E								-
18 HP564S/Ly								-
19 Moplen HP								-
20 Tatren HT 3								-
21 others								-28%
- Total	56 750	76 629	110 271	129 347	149 300	177 302	14%	19%

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...quotations from the Report...

BOPP-Films

- Considerable changes happened on the films market in 2008. “Biaxplen” carried on an expansion on the domestic [BOPP-films market](#), taking over competitors. Thus, at the beginning of last year the Company launched the second BOPP films line, having twice increased Balahn plant’s capacities – up to 35 thous. tons a year. In February 2008 “Biaxplen” bought a Kursk plant “GriNN-plastic”. In September “Roseuroplast’s” capacities added to the capacities of “Biaxplen”. By the end of the year the Company had bought Novokuibyshevsky “NovaTEK-polymer”. According to data, at the beginning of 2008 summary capacities of “Biaxplen” form about 120 thous. tons, which gives it the right to call itself a monopolist on the Russian BOPP-films market.
- The first place in the world market belonged to BOPP films – about 65% ; they are followed by BOPET film – about 21% and BOPS films – 2.5%. BOPP films have a number of properties conditioned by their principal component – polypropylene. BOPP films and packaging materials made of them are used to pack pasta, sugar, cereals, snacks, flakes, chips, crackers, confectionery, tea, coffee, food concentrates, mayonnaise, etc. BOPP films are also used to pack nonfood consumer goods: perfume boxes, colognes, creams, powders, flowers, etc.
- BOPP films are also used as a main material or a component in the production of condensers, polygraph foil, adhesive tape, dividing film for materials made of thermosetting plastics, as well as for bituminous sheets. However, the share of the industry in the consumption of BOPP films is not very big yet.

Properties of BO films

Field of application	Type of BO films and their thickness, mcm			
	BOPET	BOPP	BOPS	BOPA
Packaging film with printing and lamination	12-25	15-50	40-100	10-25
Capacitor tape	1.5-25	2-30	10-20	-
Electric appliances	25-350	10-150	10-50	-
Metallized film filaments	6-12	-	-	-
Films for graphic works	12-25	-	-	-
Glass protecting film	175-200	-	-	-
Synthetic paper	-	20-25	-	-
Labels	25-50	10-30	40-80	-
Stamping	25	50-100	-	10-50
Adhesive tapes	5-15	5-15	-	-

Source: Market Report

...quotations from the Report...



2.2.4 Sheet extrusion

- The consumption of polypropylene in the sheet extrusion sector in 2008 constituted [37.5 KT](#). The main PP consumption volumes in the sheet extrusion sector belong to Homo. Today, Russian processors actively use blends of propylene homopolymer and its copolymers in order to give specific properties to end products.
- Russian producers are the main suppliers of polypropylene to the sector of sheet extrusion. Their market share constitutes 92%. Last year, the import of PP for this sector was dominated by LyondellBasell: its supplies exceeded [2.1 KT](#). The main supply volumes belonged to Impact-copolymers [PP8300G/ NKNCh](#)
- Polypropylene is widely used in the production of thermoformed goods intended for the sector of fat-and-oil products in the food industry. However, the application of polypropylene in the most capacious dairy sector is not significant due to its low resistance to acid media (yogurt, etc.).
- The main consumption capacities in 2008 were a brand's PP8300G/Nizhnekamskneftehim. A long-time leader, the traditional "30th" became the second in consumption chart. Russian manufacturers blend this brand with Impact-copolymers, striving to get improved properties of the ready product, which are: a higher impact-resistance, low temperatures resistance, etc.
- Generally, the sheet extrusion sector demonstrates dynamic growth rates. The average annual growth of the PP consumption in this market constituted 19% during 2000-2008. Investments made by processors into this sector were quite demonstrative. According to our estimations, the peak of investments into sheet extrusion was in 2006. In 2008, Russia imported [10 PP sheet lines](#). During nine years, Russia imported about 94 PP sheet extrusion lines
- [Table](#) represents 20 converters, who made the biggest investments into PP processing with the help of sheet extrusion and thermoforming methods during the recent seven years.

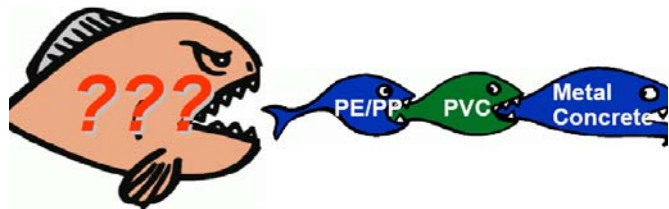
...quotations from the Report...

2.2.5 Pipes



- The consumption of polypropylene for the production of pipes constituted about [20 KT in 2008](#)
- Polypropylene pipes and fittings are intended for internal cold and hot water supply, sewerage system, warm floors and distribution of central heating systems with the temperature up to +95°C. Each of these systems have their own peculiarities, among them temperature of water and its pressure are very important.
- There are more than a dozen of companies in the world manufacturing Random to produce pipes. Borealis is the generally renowned leader in this area.
- In Russia a Random propylene's copolymer for PP-pipes production is only manufactured in Nizhnekamsk and Tomsk capacities. Theoretically such copolymers getting is possible in Buddyonovsk. At Stavrolen a hybrid polymerization reactor is installed.

Evolution of the pipe market



Source: PipeLife

- European countries gradually decrease consumption of PVC pipes. The average annual decrease of PVC pipe consumption in Europe constituted 1.2% during 2000-2005. While the growth of consumption of pipes made of PE and PP in 2000-2005 made up 1.3% and 6.8% correspondingly.
- In 2007 the demand for PP-pipe brands considerably increased and exceeded the level of 25 thous. tons. In 2008 the situation became a bit different. By the results of the year, PP consumption in the pipe sector formed a little bit more than 20 thous. tons.
- Consumption's decrease was provoked first of all by a decrease of the demand for polymer pipes and also by the situation in building industry. Today the projects that had been already started, are being built (at this builders are trying to cut the expenses, as far as it is possible). New projects are not planned.
- The least sensitive to the crisis will become companies that have already covered the expenses for their equipment and don't have any credit debts. Today companies have to analyze the market and take the steps towards the effective work, and in the crisis period to work out anticrisis strategies. Concerning the market, this also has to do with a search for new, urgent products, market niches and a new understanding of traditional products.
- In the crisis period without a primary housing habitation building, PP-pipes manufacturers can only count on the open markets. The main bulk of PP-pipes is meant for the interior interconnections, and has small diameters. PE-pipes consumption, which are mainly used for water and gas pipelines, will also be exposed to the crisis pressure, although the consequences will not be as bad.

Stroypolymer is the leading PP pipes producer in Russia

PP. General market indicators, MT

Indicator	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	2009 estimation	2010 forecast	2011 forecast	2012 forecast	2013 forecast	2026 forecast
production capacities	300 000	300 000	310 000	310 000											
Growth, %	-	-	3%	-											
Production	259 412	260 999	285 633	292 418											
Growth, %	-	1%	9%	2%											
Import	24 280	45 555	58 352	72 999											
Growth, %	-	88%	28%	25%											
Export	47 938	52 478	39 052	31 563											
Growth, %	-	9%	-26%	-19%											
Estimated consumption	235 754	254 076	304 933	333 854											
Growth, %	-	8%	20%	9%											
Utilization of production capacities, %	86	87	92	94											
Exports to Production, %	18	20	14	11											
Imports to consumption, %	10	18	19	22											

Source: Market Report

PP-Homo grades rating in the previous year, MT

No	Brand / Producer	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	Share
1	21030-16/ Tomskneftechem	5 843	6 624												
2	Balen 01030/ Ufaorgsyntez	6 194	5 990												
3	Caplen 01030/ Neftechemiya	5 674	5 000												
4	PP 1550J/Nizhnekamskneftehim	4 221	3 800												
5	PP 1525J/Nizhnekamskneftehim	3 570	3 200												
6	PP 1500J/ NKNCh	2 070	1 900												
7	Caplen 01250/ Neftechemiya	1 442	1 200												
8	TPP D30S/ Turkm. Refinery	-	-												
9	21270Д-16K/ Tomskneftechem	1 616	640												
10	Balen 01270/ Ufaorgsyntez	1 135	1 000												
11	Lipol A10 76Y/ Linos	360	-												
12	PPG 1028-04/Stavrolen	2 562	2 400												
13	PP 1035-08/ Stavrolen	2 806	2 000												
14	Kaplen 01130/MNPZ	555	490												
15	Balen 01130/Ufaorgsintez	473	450												
16	Lipol A4 71E/ Linos	45	50												
17	PP 1500N/Nizhnekamskneftehim	68	390												
18	HB306MO/Borealis	255	290												
19	RR 1315M/Nizhnekamskneftehim	327	290												
20	PP 1532B/Nizhnekamskneftehim	192	290												
21	others	4 087	5 100												
-	Total	43 495	41 000												100%

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Source: Market Report

Commissioning of new PP-Random processing capacities by regions, MT

Economic region	2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %
Central Chernozem Region	3 396	5 216									
Growth, %	-	53%									
North-Western Region	3 083	2 821									
Growth, %	-	-8%									
Volga Region	431	2 216									
Growth, %	-	413%									
West Siberia	300	2 216									
Growth, %	-	638%									
Volga-Vyatka Region	930	2 216									
Growth, %	-	238%									
Urals	2 443	2 216									
Growth, %	-	-9%									
North Caucasus	160	2 216									
Growth, %	-	1263%									
Northern Region	-	2 216									
Growth, %	-	-									
Far East	-	2 216									
Growth, %	-	-									
East Siberia	1 662	2 216									
Growth, %	-	33%									
others	4 221	1 662									
Growth, %	-	-61%									
Total	16 626	52 162									
Growth, %	-	216%	-30%	31%	53%	62%	-10%	-27%	44%	-	-

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Source: Market Report

Injection Moulding : TOP-20 Converters*, MT

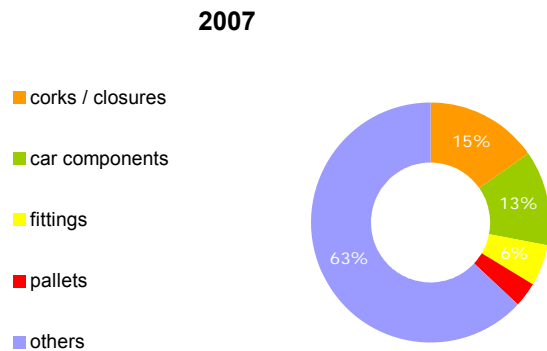
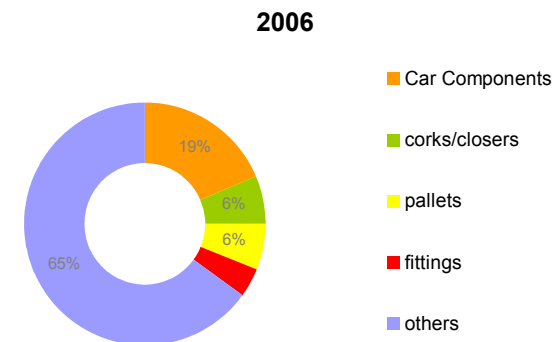
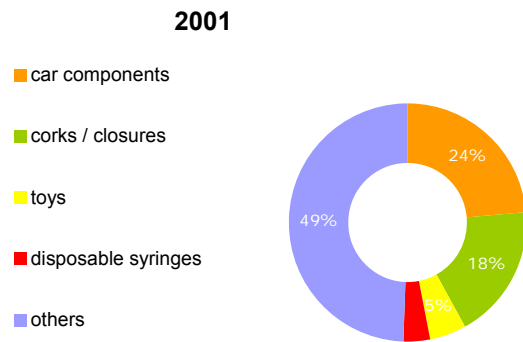
No	Producer	2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5	AAGR by 2 years,
1	AvtoVAZ	28 220	30 692	28 220								
2	GAZ, Group of Companies	15 788	14 308	15 788								
3	Vestel-SNG	-	-	-								
4	Branch Taganrog Automobile Plant	12	70	12								
5	Sergo Plant, Group of Companies	1 109	1 817	1 109								
6	Kamaz	2 345	2 208	2 345								
7	SEPO-ZEM	1 014	1 183	1 014								
8	Telebalt	-	190	-								
9	LG Rus, Group of Companies	-	-	-								
10	Avtotor, Group of Companies	111	197	111								
11	Avtoframos	-	-	-								
12	Technoprominvest	-	-	-								
13	Ulyanovsk Automobile Plant	3 878	3 139	3 878								
14	Izhavto	1 920	2 872	1 920								
15	Ford Motor Company	-	-	-								
16	Okean Plant	-	-	-								
17	GM Avtovaz	-	-	-								
18	Volkswagen Rus	-	-	-								
19	AZ Ural	-	457	-								
20	Midget Cars Plant	1 339	1 514	1 339								
21	others	53 141	17 689	53 141								
-	Total	108 879	76 336	117 000								

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Source: State Statistics Service of Russia

Injection Moulding : investments into processing by finished products types, % to USD thous



2008

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Source: Market Report

* sample equipment that is used to produce goods of PP

Fibers/Filaments: investments into processing by finished products types. USD thous.

Finished products	2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %
PP-bags	7 538										
Growth, %	-										
spanbond / meltblown	-										
Growth, %	-										
flooring	-										
Growth, %	-										
others	56										
Growth, %	-										
Total	7 594										
Growth, %	-										

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Source: Market Report

Fibers/Filaments: TOP-20 converters in terms of investments into equipment. Number of complete lines

		2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %
№	Company											
1	Himpek, Group of Companies	-	1									
2	Belgorod Packaging Materials Plant	-	-									
3	Belgorod Polymer Containers Plant	-	-									
4	Moscow Refinery	-	-									
5	Aleko, Group of Companies	1	1									
6	Spako, Group of Companies	-	-									
7	Kuskovskiy Chemical Plant	-	-									
8	Polimerkonteyner Ltd.	1	1									
9	Kama saks, Group of Companies	-	-									
10	Yantarniy Polimer	-	-									
11	Promishlennaya Upakovka	-	1									
12	Polimer-Produkt, Balakovo	-	-									
13	Uralplasttara	1	-									
14	Ufaneftehim, Group of Companies	-	-									
15	Slavich, Group of Companies	-	-									
16	Kuban-Polipak	-	-									
17	Kurmel-Gul Sentetik Ambalazh Sanay Maykop, Group of Companies	-	1									
18	Dorogobuzh	-	-									
19	Kamenskvolokno, Group of Companies	-	-									
20	Nomateks, Group of Companies	-	-									
21	others	19	16									
-	Total	22	21									

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Source: Market Report

Fibers/Filaments: TOP-20 Equipment suppliers. Commissioning of new processing capacities, MT

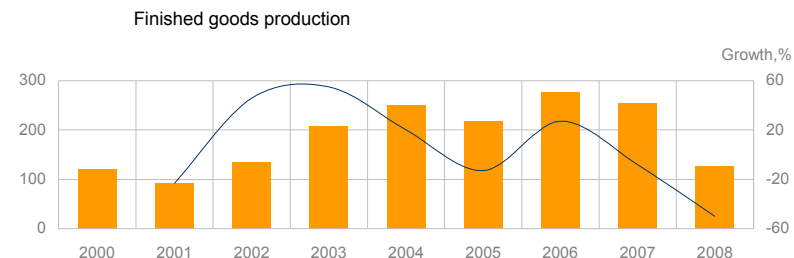
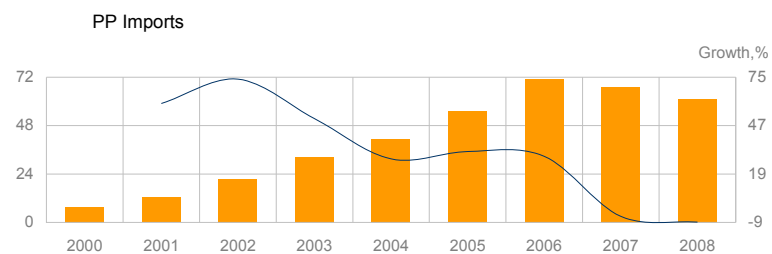
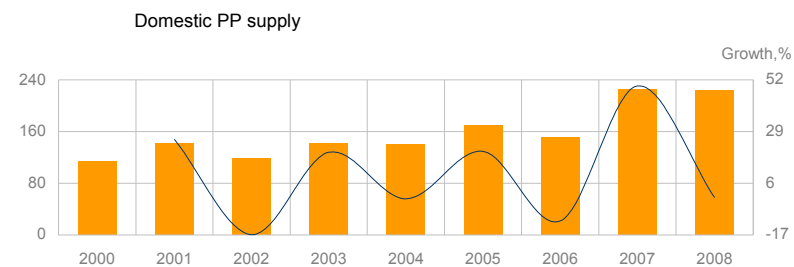
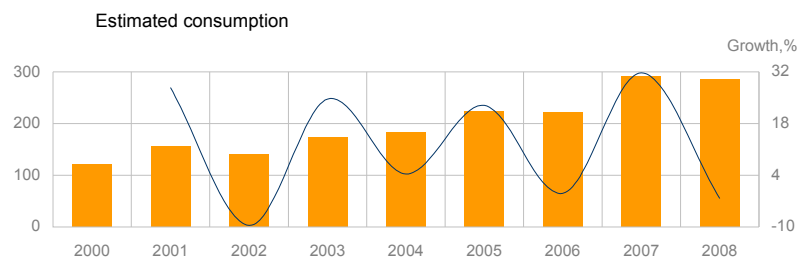
Manufacturer	2000	2001	2002	2003	2004	2005	2006	2007	2008	Total	Share
Starlinger	9 832										%
Botheven Machinery	-										%
YongMing Machinery Manufacturing	-										%
Barmag	1 400										%
Pacific Machinery	-										%
Lohia Starlinger	1 950										%
Changzhou Hengcheng Plastic Machinery	-										%
Neumag Zweigniederlassung	-										%
Meccaniche Moderne	-										%
SML Maschinengesellschaft	-										%
Qingdao Plastic Machinery	-										%
Ningbo Liguang Machinery	1 826										%
Emar	-										%
Kun Fong Machinery	-										%
Tria	1 500										%
Technoplast	-										%
Theyson Extrusionstechnik	-										%
Comerio Ercole	-										%
Zhejiang Jinhai Plastic Machinery	-										%
Yantai Kueni Plastic Machinery	-										%
others	14 605										%
Total	31 113										%

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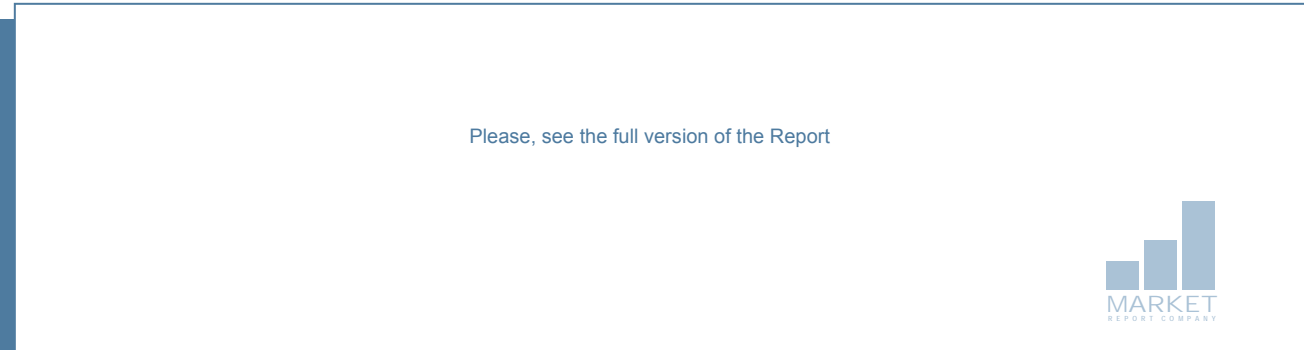
Source: Market Report

Injection Moulding : PP supply analysis, KT



Source: Market Report

Films extrusion: PP supply analysis, MT

Indicator	2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %	
Converters production capacities	3 450	7 326										7%
Growth, %	-	112%										-
Import	412	321										3%
Growth, %	-	-22%										-
domestic supply	887	1 167										2%
Growth, %	-	32%										-
Estimated consumption	1 299	1 488										3%
Growth, %	-	15%										-
Imports to consumption,%	32	22										-

Source: Market Report

Films extrusion: PP grades rating, MT

		2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %
№	Brand / Producer											
1	PP 1525J/Nizhnekamskneftehim	-	-	-	-	-	-	2 220	27 054	22 157		244%
2	PPG 1028-04/Stavrolen	-	-	-	-	-	-	-	-	-		
3	RR 1315M/Nizhnekamskneftehim	-	-	-	-	-	-	-	-	-		
4	Seetec PP H4540/Hyundai Petrochemical	-	-	-	-	-	-	-	-	-		
5	03H77-MAB/Propilco	-	-	-	-	-	-	-	-	-		
6	Moplen HP515M/LyondellBasell	-	-	-	-	-	-	-	-	-		
7	Eltex PKS409/ Ineos Polyolefins	-	-	-	-	-	-	-	-	-		
8	Eltex PKS359/Ineos Polyolefins	-	-	-	-	-	-	-	-	-		
9	PP1445S/Nizhnekamskneftehim	-	-	-	-	-	-	-	-	-		
10	Capilene G 65 F/Carmel olefins	-	-	-	-	-	-	-	-	-		
11	Turkmenplene TPP F 79FB/Turkmenbashinskiy NPZ	-	-	-	-	-	-	-	-	-		
12	Adsyl 5C30F/LyondellBasell	-	-	-	-	-	-	-	-	-		
13	Aculon/DSM	-	-	-	-	-	-	-	-	-		
14	RD461CF/Borealis	-	-	-	-	-	-	-	-	-		
15	Moplen RP226M/ LyondellBasell	-	-	-	-	-	-	-	-	-		
16	Eltex PKS350/Ineos Polyolefins	-	-	-	-	-	-	-	-	-		
17	ATG4509PP/Constab	-	-	-	-	-	-	-	-	-		
18	Balen 01031/Ufaorgsintez	887	-	-	-	-	-	-	-	-		
19	Eltex PKS407/Ineos Polyolefins	-	-	-	-	-	-	-	-	-		
20	Moplen HP525J/LyondellBasell	-	-	-	-	-	-	-	-	-		
21	others	412	-	-	-	-	-	-	-	-		
-	Total	1 299										

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Source: Market Report

Films extrusion: TOP-20 Finished goods exporters in the previous year, 2007, MT

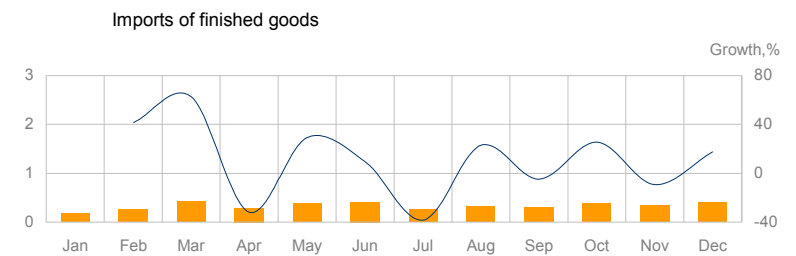
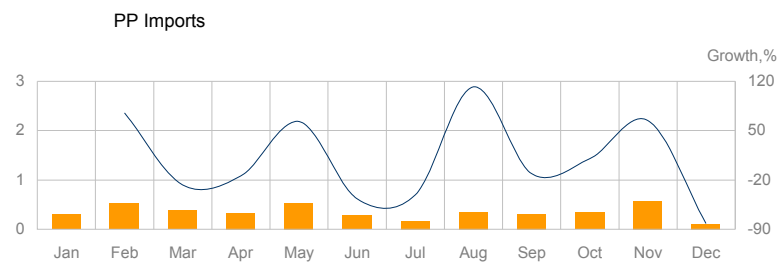
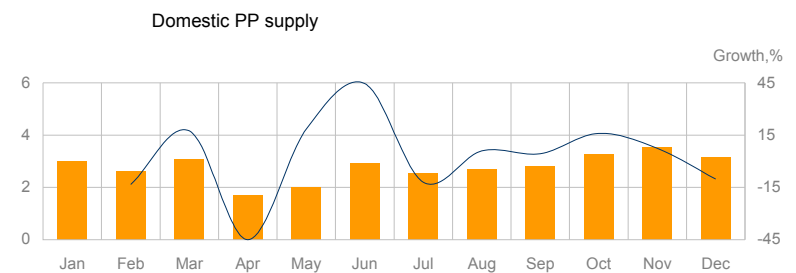
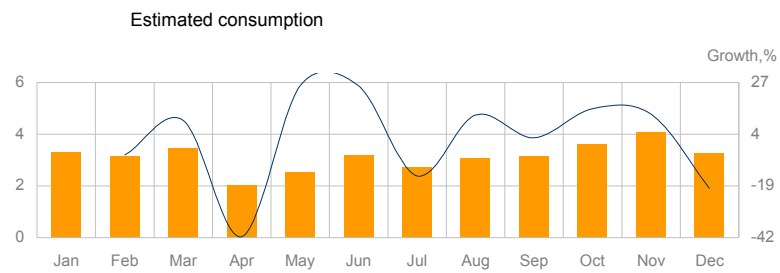
№	Producer	Янв	Фев	Мар	Апр	Май	Июн	Июл	Авг	Сен	Окт	Ноя	Дек	Всего	Доля
1	Corporation Grinn	342	501												
2	Bipak	131	192												
3	Isratek C	109	161												
4	Novatek-Polymer	65	95												
5	Atlantis-Pak	33	49												
6	Biaxplen	12	18												
7	Packaging Factory	8	12												
8	Interpak	-	-												
9	Real Plast	-	-												
10	Uralplastik	1	2												
11	Polimerkonteyner	-	-												
12	Ukrplastik	4	6												
13	Ekofleks	-	-												
14	Likofleks, Spb	0	0												
15	Exxon Mobil	-	-												
16	Multiflex	1	1												
17	Planeta-Center	1	1												
18	Samara-Sintez	0	0												
19	Korolyovskaya Upakovka	-	-												
20	Kraft	0	0												
21	others	7	10												
-	Total	714	1 047												

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Source: Market Report

Sheet extrusion: PP supply analysis in the previous year, 2008, KT



Source: Market Report

Sheet extrusion: PP-Homo grades rating, MT

		2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5	AAGR by 2 years
№	Brand / Producer											
1	Balen 01030/ Ufaorgsyntez	2 969										
2	Caplen 01030/ Neftechemiya	3 393										
3	21030-16/ Tomskneftechem	2 121										
4	NS205TF/Borealis	-										
5	Seetec PP H5300/Hyundai Petrochemical	-										
6	HB300/Borealis	-										
7	PPG 1060-08/Stavrolen	-										
8	Tipplen H890/TVK	-										
9	Moplen HP540J/LyondellBasell	-										
10	Moplen HP 456J/LyondellBasell	-										
11	Mosten EH001/Unipetrol	-										
12	PP5112E1/Exxon Mobil	-										
13	HB120FB/Borealis	44										
14	Malen P F-401/LyondellBasell	22										
15	Moplen HP400H/LyondellBasell	-										
16	others	-										
-	Total	8 549										

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Source: Market Report

Pipe Extrusion: TOP-20 Finished goods importers in the previous year, 2007 , MT

№	Producer	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1	PiISA-Plastik	343												
2	Firat Plastik	98												
3	Ekoplastik	94												
4	KALDE KLIMA	25												
5	Pipelife	86												
6	Kaczmarek	287												
7	Ostendorf Kunststoffe	67												
8	Pro Aqua	-												
9	Novaplast	61												
10	FV-Plast	-												
11	Jimten	270												
12	Dizayn Teknik Plastik	-												
13	FRANTISEK VONDRACEK FV-PLAST	38												
14	Wavin	20												
15	Torplast	16												
16	Europlast	9												
17	Hakan	-												
18	GSP Group	15												
19	ARILI PLASTIK	-												
20	Megaplast	-												
21	others	566												
-	Total	1 996												

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Source: Market Report

PP-Homo production by grades, MT

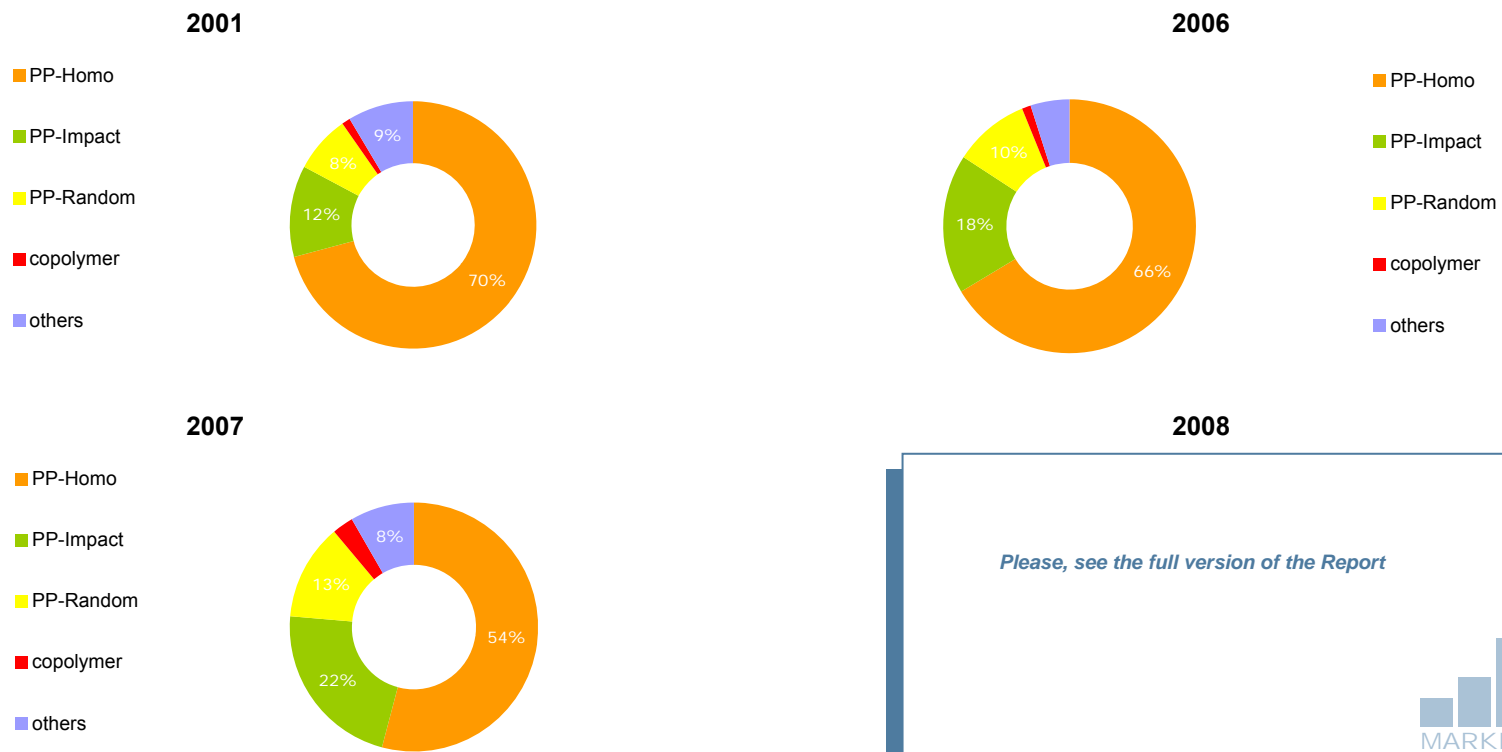
Brand / Producer	2000	2001	2002	2003	2004	2005	2006	2007	2008	AAGR by 5 years, %	AAGR by 2 years, %
21030-16/ Tomskneftechem	41 408	77 382									
Growth, %	-	87%									
Balen 01030/ Ufaorgsyntez	62 076	73 269									
Growth, %	-	18%									
Caplen 01030/ Neftechemiya	74 820	70 091									
Growth, %	-	-6%									
Caplen 01250/ Neftechemiya	6 788	7 875									
Growth, %	-	16%									
PP 1550J/Nizhnekamskneftehim	-	-									
Growth, %	-	-									
Balen 01270/ Ufaorgsyntez	7 699	8 416									
Growth, %	-	9%									
PP 1525J/Nizhnekamskneftehim	-	-									
Growth, %	-	-									
21270years-16K/ Tomskneftechem	-	1 891									
Growth, %	-	-									
Kaplen 01130/MNPZ	2 899	3 024									
Growth, %	-	4%									
PP 1500J/ NKNCh	-	-									
Growth, %	-	-									
others	26 351	11 666									
Growth, %	-	-56%									
Total	222 041	253 614									
Growth, %	-	14%									

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Source: Market Report

PP imports structure by types, %



Source: Market Report

About Us

Market Report Company was founded in 2003. Our goal is to provide the most professional information on the petrochemical markets of Russia, the CIS and East-European countries.

Today, MRC publishes regular reports on the markets of polyethylene, polypropylene, PVC and polystyrene. Furthermore, our analysts have information on the markets of additives, masterbatches, films, pipes, window profiles and automobile components.

Our clients

We are trusted by TOP-50 world petrochemical companies, which overall sales volumes exceed the Russian GDP more than two times.

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, Nizhnekamskneftekhim, Nubiola, Polimeri Europa, R&H, Samsung, Solvay, Shin-Etsu, Total Petrochemical, TVK, Huhtamaki, Lukoil-Neftekhim, Sibur, Sayanskkhimpplast, Plastcard, Bashkhiim, Kazanorgsintez, Tatneft and others.

Reports

MRC publishes about 1500 reports annually. Our portfolio includes:

- Annual reports
- Weekly Price Reports
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Contacts

Moscow: +7 495 543 91 94
London: 44 20 814 422 25
Kyivl: +38 044 599 29 50

Hinfo@mrcplast.com
Hwww.mrcplast.com
Hwww.mrcplast.ru

Post

180, Tottenham Court Road, Suite 12 W1T 7PD,
London, UK
4A, Sokolnicheskaya Sq., Moscow, 107113,
Russia
5, Petrovskogo St. Kharkiv, 61002, Ukraine.

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Methodology

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.

Our latest Annual reports

- PE in Russia 2009
- PP in Russia 2009
- PET in Russia 2009

Analytics



Vladimir Shugaliev
Hvladimir.shugaliev@mrcplast.com
3 177 293 76
S Vladimirshugaliev



Natalia Basmanova
Hnatalia.basmanova@mrcplast.com
1 744 275 32
S Nataliabasmanova

Subscription:



Svetlana Kivrenko
Hsvetlana.kivrenko@mrcplast.com
5 994 572 88
S Svetlanakivrenko



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