plastic consult
business insight

via Savona 97 | I - 20144 Milano | t + 39 02 477 111 69 | f + 39 02 477 111 88 | www.plasticconsult.it | plasticconsult@plasticconsult.it

PRESS RELEASE

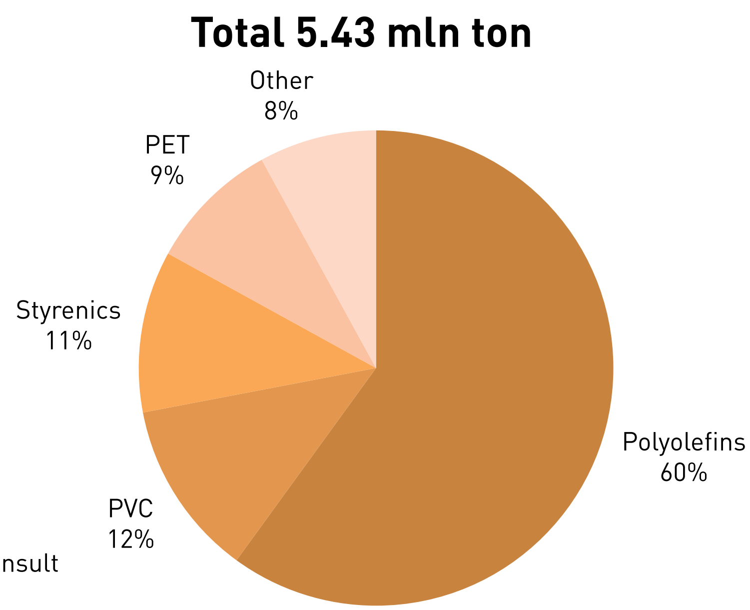
2012 – THERMOPLASTICS IN ITALY: FREE FALL

The most relevant facts and figures of the Italian plastics market are reported in the latest edition of the multiclient study "Plastic trend Synthesis 2012", completed in January 2013. The study analyses the supply/demand trend of all main polymers.

Declining sales volumes were recorded for every polymer over all 2012, largely due to weakened conditions of the Italian economy. Total sales closed with a -9% mark with respect to the 2011 level. Overall virgin polymers demand went back 15 years, shrinking to slightly over 5.4 million tons, the same amount recorded in 1997.

This figure compares with the over 7.1 million tons consumed in 2007, year in which the Italian thermoplastics market reached its peak value.

Italian converters experienced a very tough year, with a steeply declining domestic demand, coupled with a competitiveness loss on main export markets in the second half of the year. Structural problems, namely high energy and labour costs, small scale production with respect to the other main European converters, undermine the economics of this sector.



Source: Plastic Consult

All major applications showed a sharp decrease by year's end. Polyethylenes, as a whole, recorded a -13% and over, with all main outlets in distress.

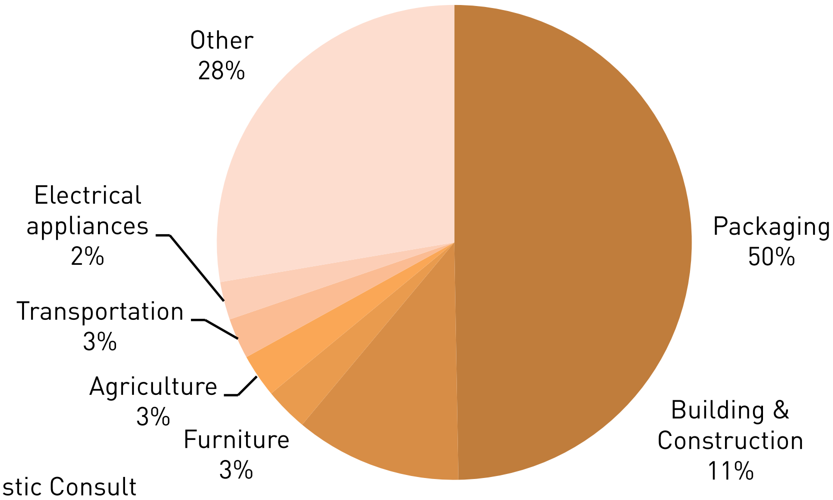
Most other polymers also experienced a severe drop in demand in respect to 2011: polystyrenes, as a whole, -14%, PVC -10%, ABS and PET approximately -4%.

Only PP saves the day, limiting the loss to only -2% compared with 2011.

The breakdown by major end markets did not vary markedly in ranking: packaging still represents about 50% of total demand followed by building and construction, with slightly over 10%, that is giving up substantial ground with respect to the previous year.

Other end uses of some relevance are furniture, transportation, electrical household appliances and agriculture, with a share of total consumption of 2-3% each.

Total 5.43 mln ton



Source: Plastic Consult

Who is Plastic Consult

Plastic Consult, based in Milano - Italy, is an independent and privately owned consulting company founded in 1979.

We have acquired over the years an extensive knowledge of the petrochemical and plastic processing industries. We have investigated technologies, economics, markets and marketing, production structure, environmental issues, innovation, strategic positioning of main actors.

Our job is to advise organisations active in the plastics and polymers market.

For further information: www.plasticconsult.it - plastictrend@plasticconsult.it