

venture partner, Pipelife International of Vienna; and the sale of a majority stake in its flexible tube operation Tu-Plast to the Swiss group Neopac. Pannonplast's processing activities are now mainly focussed on packaging products through Almand (blow moulded bottles); Pannon-Effekt (blow moulded drums) and Pannunion (rigid films and sheet).

Hungary's largest processing market is film extrusion which accounted for 24% of the total demand for thermoplastics in 2008. Major extruders of PE film are Partium 70 (which produces agricultural film and industrial sacks), Nordenia Hungaria (retail packaging), Kabaplast and Rotapack (stretch film). BOPP production is now carried out by Taghleef Industries, which acquired the Radici film operations in 2008, Radici having earlier bought the BOPP film operations of TVK. PVC film extrusion is carried out primarily by Pannunion, a Pannonplast subsidiary, and the Borsodchem subsidiary, Ongropack.

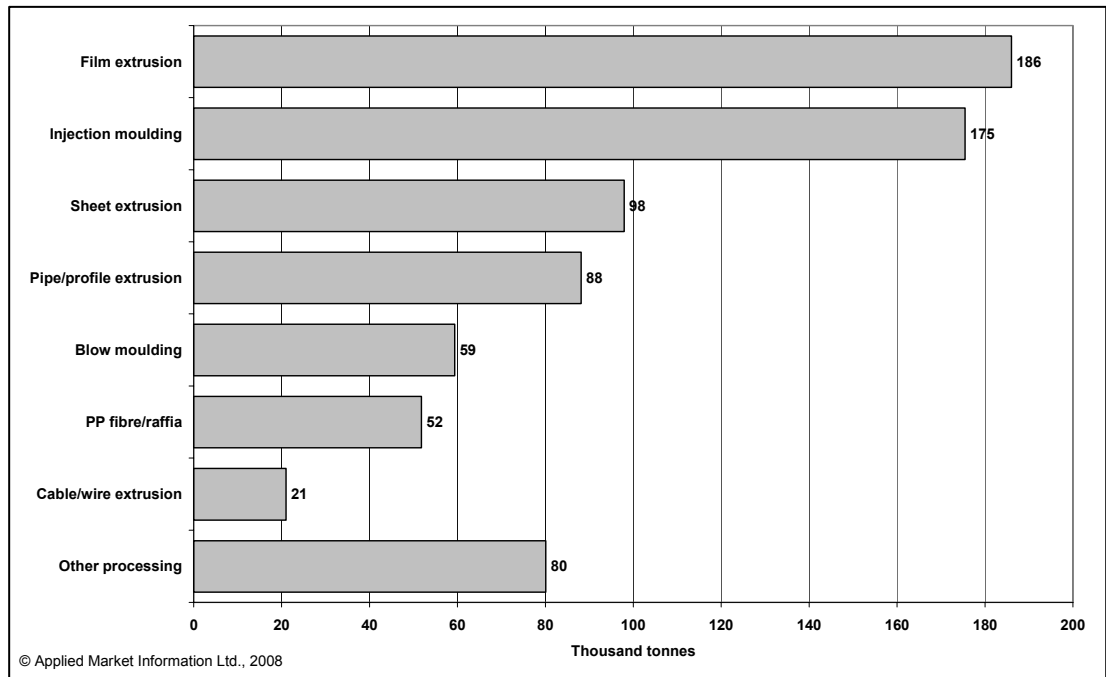


Figure 2: THERMOPLASTICS DEMAND IN HUNGARY BY END USE PROCESS 2008

Injection moulding is the second largest processing market for thermoplastics. Injection moulders supply predominantly the teleelectronics, electrical, packaging and automotive industries. The leading teleelectronic housing moulders are Flextronics, Phoenix Mecano Kecskemet and Dekorsy. Electrical components are moulded primarily by Videoton MBKE Elektronika, PVS Hungary, and Legrand. Other important injection moulders are Jasz-Plasztik, which in 2006 opened a new plant to supply Electrolux. Perlos, the Finnish moulder of mobiles phones and pharmaceutical packaging which invested EUR 15 million in expanding its site in Komaron in western Hungary, transferring production there from Finland.

Car production is not as significant in Hungary as elsewhere in Central Europe. However, Japan's Suzuki has been expanding production in Hungary where it makes the Swift and Wagon R Plus. Assembly is also carried out by Volkswagen of the Audi TT. But the automotive industry continues to attract new investment in the country. In 2007 Cadence Innovation set up a joint venture with Sumitomo Corporation to produce door panels for Suzuki, while Delphi moved its plastic parts production from Brazil to Hungary. As would be expected several of Europe's leading moulding groups are active in Hungary supplying the automotive sector, including Nief Plastic, Nypro and Nolato.

3B SCIENTIFIC EUROPE Kft.

Kozma u. 9-11
1108 Budapest
Tel: 01 431 0914
Fax: 01 262 3393
E-mail: biocalderoni@biocalderoni.hu
Website: www.3bscientific.hu
Contact: Mr. P. Szekeres, Managing Director

Parent company: 3B Scientific, Germany
Year founded: 1993
ISO registration: ISO 9001v2000

Processes operated: Injection moulding,
Rotational moulding

A + I'S Ltd. CANADA Kft

Lőrinci út 55
2220 Vecsés
Tel: 029 550 510
Fax: 029 550 520
E-mail: info@aandicanada.hu
Website: www.aandicanada.hu
Contact: Ms. A. Kiss, Managing Director

Parent company: Ltd Canada
Year founded: 1991

Processes operated: PE film extrusion

A. SCHULMAN kft

Vertanyk Tere 8A
PF 203
2800 Tatabánya
Tel: 34 316 464
Fax: 34 316 464
E-mail: aschulman@hu.aschulman.com
Website: www.aschulman.com
Contact: Mr. F. Horneckzy, Plant Manager

Parent company: A. Schulman Inc., Germany
Year founded: 2000
ISO registration: ISO 9001; 14001

Processes operated: Compounding

ABSZOLÚT MŰVEK Kft. (ABT MŰVEK)

Hengermalom út 20
1117 Budapest
Tel: 01 206 6727
Fax: 01 206 6719
E-mail: abtmuvek@hu.inter.net
Website: www.abtmuvek.hu
Contact: Mr B. Fischer, Managing Director

Parent company: Privately Owned
Year founded: 1995
ISO registration: ISO 9001v2000

Processes operated: Injection moulding

ACTUAL ABLAKGYARTO KFT

II Rákóczi F. út 289-295
1214 Budapest
Tel: 01 420 4476
Fax: 0278 2025
E-mail: info@actual.hu
Website: www.actual.hu
Contact: Mr. J. Schillinger, Managing Director

Parent company: Actual GmbH; Austria
ISO registration: ISO 9001; 14001

Processes operated: Profile extrusion

ADRIENN BT

Tiszai Major 1
4090 Polgár
Tel: 052 391399
Fax: 052 391399
Contact: Mr. Z. Pákozdi, President

Parent company: Privately Owned
Year founded: 1992
ISO registration: ISO 9002

Processes operated: PE film extrusion

**AGRON MŰANYAG-ÉS GUMIIPARI
GYÁRTÓ Kft.**

Andrássy út 97.
1062 Budapest
Tel: 01 351 3646
Fax: 01 351 3646
E-mail: agron@t-online.hu
Website: www.agron.hu
Contact: Mr. Gy. Molnár, Managing Director

Parent company: Privately Owned
Year founded: 1989
ISO registration: ISO 9001v2000

Processes operated: Injection moulding

AGROTEX Kft

Péterfia u. 4
4026 Debrecen
Tel: 052 414 375
Fax: 052 533 460
E-mail: agrotex@agrotex.axelero.net
Contact: Mr. G. Kuritar, Managing Director

Parent company: Privately Owned
ISO registration: ISO 9001

Processes operated: PE film extrusion

DUOPACK Kft

Polymers processed: LDPE, LLDPE, HDPE
 Film produced: Film On Reel, Agricultural Greenhouse, Building Film, Shrink Film/Pallet, Stretch Film, Freezer Film, Bubble Wrap; Cling Film.
 Film product manufactured : Other Bags, Industrial Sacks, Refuse Sacks, Other Sacks
 Services offered: Printing
 Minimum width: 100
 Maximum width: 2000
 Polymer throughput: Between 1001 - 3000 tonnes

DUOPACK Kft

Polymers processed: LLDPE, HDPE, Reclaimed PE.
 Film produced: Film On Reel, Agricultural Mulch, Building Film, Freezer Film, Food Packaging; Bubble Wrap.
 Film product manufactured : Carrier Bags, Other Bags, Other Sacks
 Services offered: Flexo Printing, Printing
 Minimum width: 250
 Maximum width: 4600
 Number of layers: 2
 Polymer throughput: Between 1001 - 3000 tonnes

ELSŐ MAGYAR KENDERFONÓ RT

Polymers processed: HDPE, PP
 Film produced: Agricultural Film, Film On Reel
 Film product manufactured : Other Bags, Industrial Sacks, Agricultural Bags (made of PE Stretch Plain Film).
 Minimum width: 200
 Maximum width: 1900
 Polymer throughput: Between 1001 - 3000 tonnes

EXTRA-PLAST MŰANYAGFELDOLGOZÓ SZÖVETKEZET Ltd.

Polymers processed: LDPE, LLDPE, HDPE
 Film produced: Agricultural Film, Film On Reel, Agricultural Mulch, Building Film, Shrink Film/Collation, Shrink Film/Pallet, Freezer Film, Hygiene Film (Tissues, Toilet Paper, Kitchen Roll etc.).
 Film product manufactured : Other Bags, Industrial Sacks, Refuse Sacks, Food Bags.
 Services offered: Flexo Printing, Printing
 Minimum width: 150
 Maximum width: 2400
 Polymer throughput: Between 1001 - 3000 tonnes

FÓLIA SZABÓ Kft

Polymers processed: LDPE, HDPE
 Film produced: Film On Reel, Film for Food/Drink Packaging.
 Film product manufactured : Carrier Bags, Other Bags, Refuse Sacks
 Services offered: Flexo Printing, Printing
 Minimum width: 100
 Maximum width: 1000
 Polymer throughput: Less than 1000 tonnes

FOLIA-CARGO Kft

Polymers processed: LDPE, LLDPE, HDPE, MDPE.
 Film produced: Film On Reel, Food Packaging Film; Film for Milk Packaging.
 Film product manufactured : Other Bags, T-Shirt Bags.
 Services offered: Flexo Printing, Printing
 Number of layers: 3
 Polymer throughput: Between 1001 - 3000 tonnes

FÓLIAFELDOLGOZÓ BT

Polymers processed: LDPE, HDPE
 Film produced: Film On Reel
 Film product manufactured : Carrier Bags, Other Bags, Industrial Sacks, Refuse Sacks, Other Sacks
 Services offered: Flexo Printing, Printing
 Minimum width: 200
 Maximum width: 1200
 Polymer throughput: Between 1001 - 3000 tonnes

FÓLIAPLAST Kft

Polymers processed: LDPE, LLDPE, HDPE, PP
 Film produced: Agricultural Film, Film On Reel, Agricultural/Silage, Agricultural Mulch, Agricultural Greenhouse, Stretch Film, Shrink Film.
 Film product manufactured : Carrier Bags, Other Bags, Other Sacks
 Services offered: Printing, Product Lamination
 Polymer throughput: No Polymer consumption available

FOLPLAST IPARI ÉS KERESKEDELMI Kft

Polymers processed: LDPE, PP
 Film produced: Film On Reel, Agricultural/Silage, Agricultural Mulch
 Film product manufactured : Industrial Sacks, Food Packaging.
 Services offered: Flexo Printing, Printing
 Minimum width: 300
 Maximum width: 1200
 Polymer throughput: Between 1001 - 3000 tonnes