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European Integration Project Part 1

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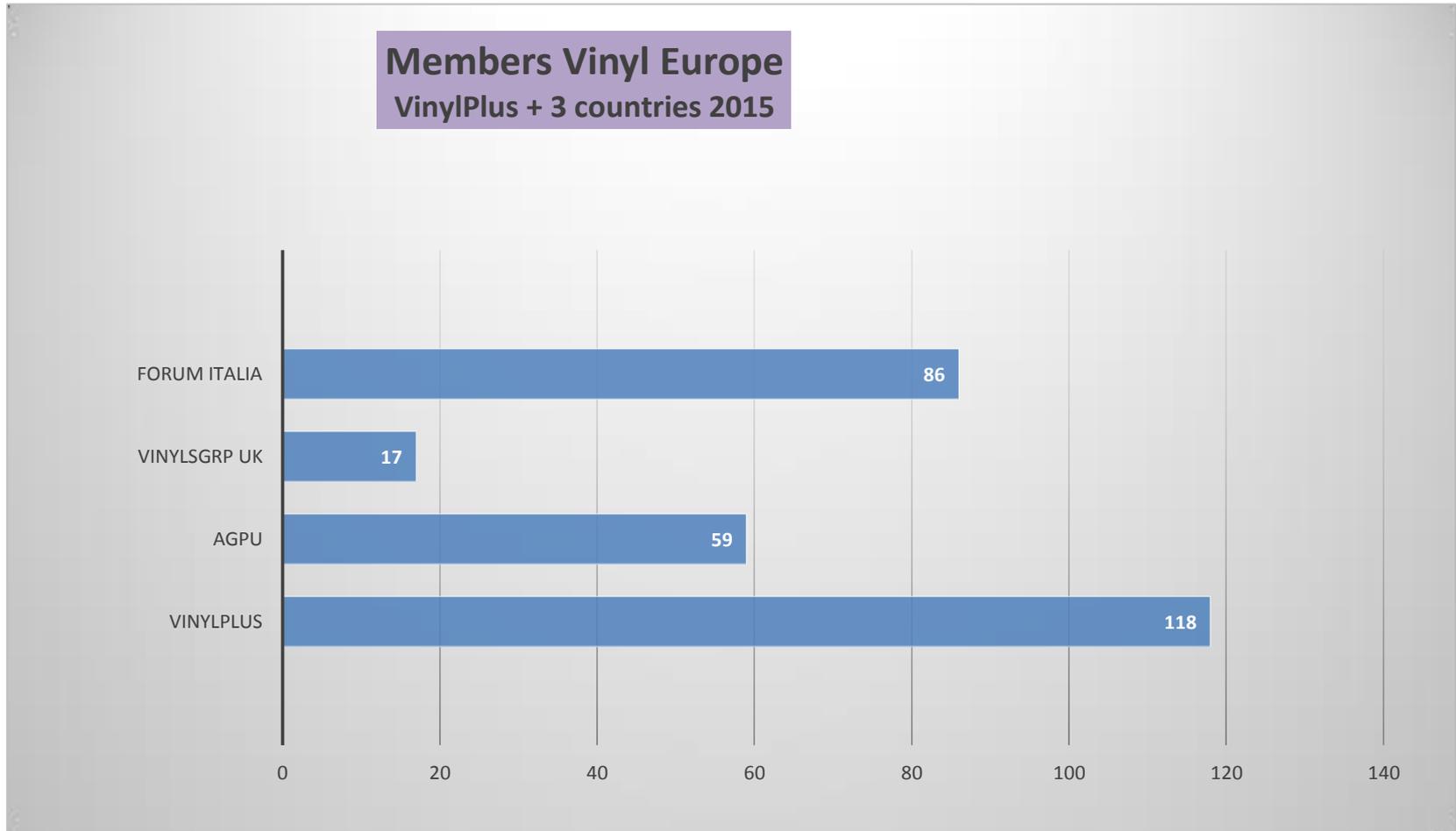
A Task Force “European Integration” with members from the national and European PVC organizations has developed a concept how to better integrate the current European vinyl initiatives step by step.

Why do we need to act ?

- 250 companies in Europe invest into PVC support
- Total investment estimate is 8 – 9 Mio Euro p.a.
- Reach out is 1000 companies with vital interest in PVC
- Our “market share” is 25 % (from turnover above 50 %)
- National, European and industry projects compete
- *“These investments are not fully transparent and ultimately not synchronized. Interaction and learning must be improved in order to develop synergies, avoid duplications, and speak with one voice”.*

Vinyl Europe - supporters

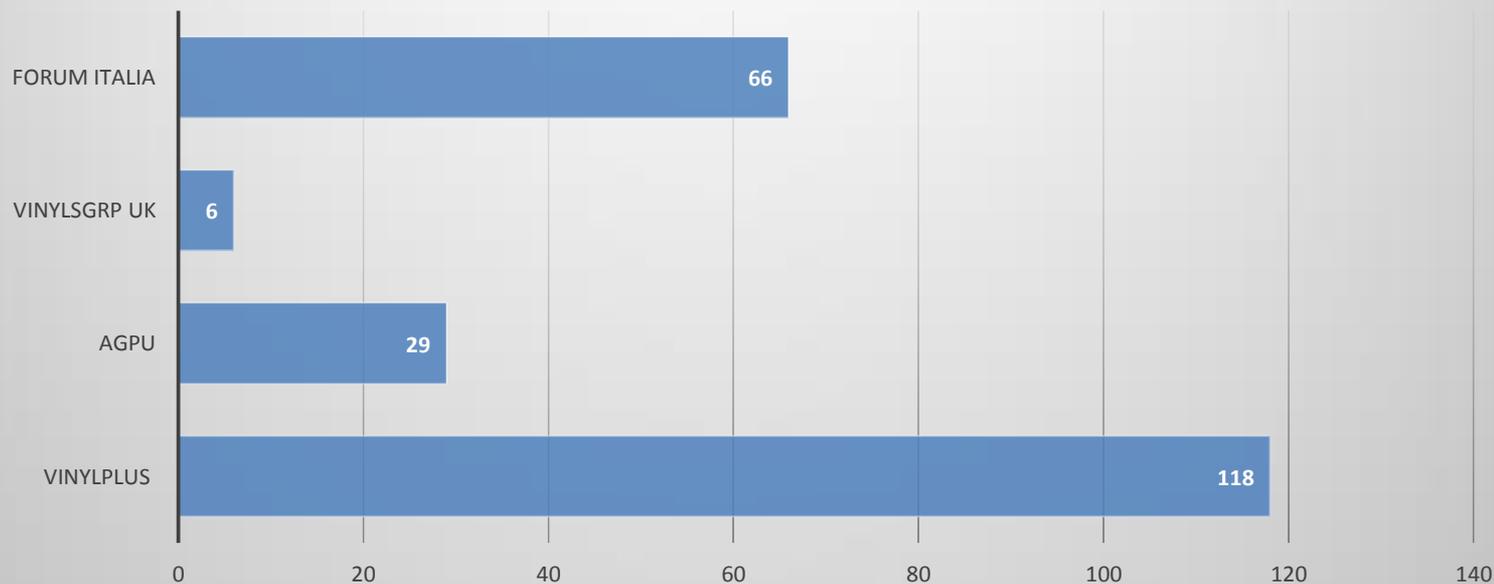
(VinylPlus net of plants)



Vinyl Europe

Net calculation / keeping VinylPlus fixed

Members Vinyl Europe
net: 219 companies



The Story in a nutshell

- The PVC resin and additive producers together with the key converters take the lead to synchronise the European activities.
- Many medium and small sized companies (especially in the countries) do not have the financial capabilities to support more than one PVC initiative. We believe they would not oppose to figure under one European Vinyl brand / roof if costs are moderate, value visible and the “national roots” maintained.
- *“VinylPlus is a sustainability program, credible but somehow defensive”, an important prerequisite for effective advocacy and communication activities. “The national teams promote PVC, offensive, through PR and communication. They try to reach key deciders and explain the benefits of the material”.*
- *“Both is important but must be better synchronized”.*

Commitment from the key investors



“This project is not about saving money but about reaching a higher effectiveness and efficiency for the industry investment”.

The leading investors are committed to keep the current funding level during 3 years as long as the integration project is progressing and achieving the milestone targets.

VinylPlus and 3 countries - Multipayers



Multipayers

Payment

	one	two	three	four
Converters + Others	125	22	8	1
Compounders	20	0	0	0
Resin	1	3	1	2
Additives	26	5	3	2
Total	172	30	12	5

219

Renolit

Inovyn

Vinnolit

Baerlocher

Exxon

The Project Targets

WHAT to achieve:

- 1. Coordinate and integrate all Vinyl activities**
- 2. Speak with 1 voice in Europe but keep a strong national focus.**
- 3. Convince more companies to support and join VinylPlus.**
- 4. Value proposition / attractive brand / tag that helps financing**
- 5. Increase work efficiency, run “VinylPlus Newco” like a company**
- 6. Increase visibility and recognition of VinylPlus**

HOW to start:

- (1) Establish a “European Management Team” with one joint budget**
- (2) Controlled by “Budgetary Committee” with key funding companies**
- (3) Start via a nucleus involving Europe + 3 countries, then expand**