

Polycarbonate in Poland: A major contributor to the country's economy and quality of life

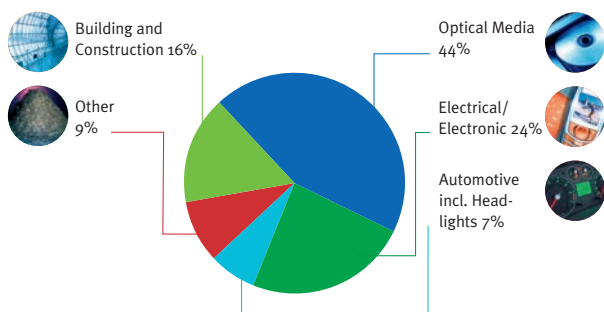
Polycarbonate is a lightweight, highly versatile, durable, heat and shatter resistant, formable and transparent thermoplastic. It is the material of choice for a wide range of end-user applications as diverse as DVDs, spectacles and optical lenses, car headlamps and parts, transparent roofs in construction, or medical devices.

Poland has no own polycarbonate production and therefore depends on imports from other countries to supply its Polish industries' needs of this high performance plastics material. However, due to its function as enabling technology, **nearly 22,000 jobs were related to the use of polycarbonate in Poland in 2010**. In that year, Poland consumed about 6% of the EU production of polycarbonate, thereby generating ca. 2.1 billion of value added.

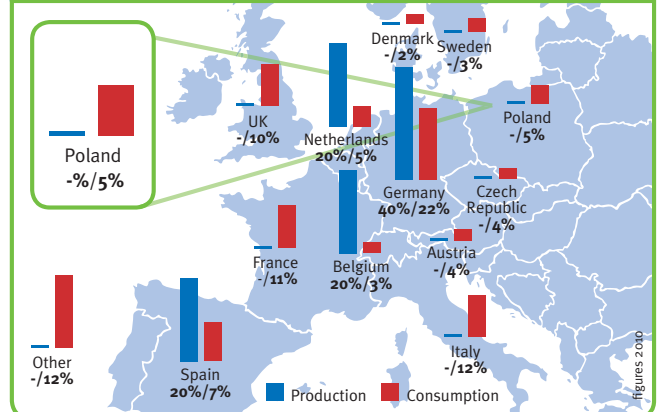
Over 90% of the Polish consumption of polycarbonate is concentrated in four key economic sectors: Optical Media, the Electrical & Electronics incl. Domestic appliances, Building & Construction and the Automotive industries.

Poland is a major location for the European Optical Media industry: Within the EU, Poland represents the second largest production centre for optical storage media like CD, DVD, Blu-Ray discs. Poland also manages one of the largest production centres for modern large flat screen LCD TVs.

Polish consumption of polycarbonate by sectors



European production and consumption of polycarbonate by countries



In these applications, the functional performance of the end products depends on the use of polycarbonate: In flat screens, for example, films based on polycarbonate technology are used in the diffuser sheet of the monitor, maximizing the picture quality. Blends of polycarbonate are used to provide light weight, robust housings, allowing a high design flexibility as well as the required high impact resistance, stability and safety features.

In the Electrical and Electronics sector, polycarbonate is used as a critical component in many technically complex and safety related applications, such as fire retardant computer housings, electrical installations, or domestic appliances. **Poland**, alongside with Italy and Germany, **is one of the leading producers of domestic appliances in Europe** and exports about 90% of output. More than

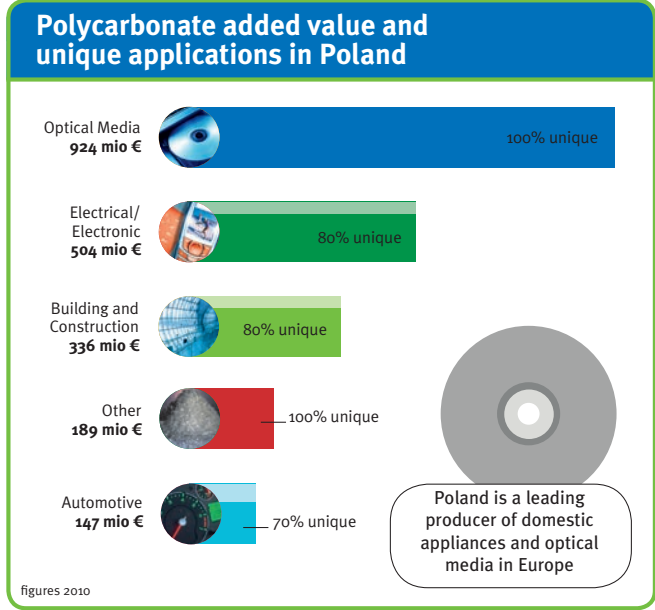
* All figures in this document are based on the year 2010. The figures have been determined in a conservative approach ensuring that only the jobs and value added that could be uniquely attributed to polycarbonate should be counted in this value chain.



20,000 direct jobs are related to this sector alone in Poland. In 2010, the Polish Electrical & Electronics sector overall supported 140,000 jobs.

In many of these applications polycarbonate is critical to transforming the functional characteristics of components or end uses. This means: Polycarbonate cannot be replaced by any other material if the same material performance characteristics are required.

Polycarbonate is a dynamic enabling platform technology for innovation, thus helping to sustain the Polish manufacturing base. The competitive position of a significant number of leading Polish companies depends upon the continued exploitation of the many and unique properties of polycarbonate. It offers solutions to modern societies to meet the emerging needs for lower weight, greater safety and security, lower risks and improved well-being, while at the same time reducing costs and improving the product performance.



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