

Annexe

to the

Press Release

Bioplastics show signs of a boom in 2006

21 November 2006, Brussels

Survey on market development 2006 amongst EuBP members

Adare Packaging Solution (UK)
Agrana Stärke (A)
Alcan Packaging Beauty (F)
Alcan Packaging (CH)
Arkhe (JP)
Autobar (F/D)
BASF (D)
BioBag international as (N)
BIOP (D)
BIOTEC (D)
C.A.R.M.E.N. (D)
CEDAP (MC)
Cereplast (US)
Composto (CH)
Coopbox (I)
Danisco Emulsifiers (DK)
Danone (F/D)
Duales System DSD (D)
Dupont de Nemours Int. (CH)
Faerch Plast (DK)
FKuR (D)
Grenidea (SIN)

Holfeld Plastics (IE)
Huhtamaki (FIN/D)
Hycail (NL)
Innovia Films (UK)
Interseroh (D)
Kaneka (JP)
Kraft Foods (USA/D)
Maag (D)
Mann & Hummel (D)
Manuli Stretch (D)
Metabolix (USA)
Mitsubishi Chemicals (JP/D)
Mitsui Chemicals (JP)
narocon Consulting (D)
NATISS (B)
natura (NL/D)
NatureWorks (USA/NL)
Nestlé (CH)
NNZ (NL)
Novamont (I/F)
OWS (B)
Pacovis (CH)

Plantic Technologies (AUS)
PolyOne (B)
Purac (NL)
Reifenhäuser (D)
Rodenburg Biop. (NL)
Roquette (F)
SCHOELLER-ALDO (D)
Sealed Air (USA)
Sidaplast (B)
Sirap Gema (I)
SPhere (F)
Stanelco (UK)
Sukano (CH)
Tate and Lyle (B)
Tetra Pak (S)
Treofan (D/F)
Uhde Inventa-Fischer (D)
W. Bailey Ltd. (UK)
Wentus (D)
Universities:
- Hannover (D, FBAW)
- Rosenheim (D, Fh)
- Tulln (A, IFA)
- Utrecht (NL, STS)

Quotes from the members' survey

- "The development and adoption of bioplastics continues to accelerate" (Snehail Desai, Commercial Director of NatureWorks)
- "Strong growth in interest in biodegradable and renewable packaging in general" (Andy Sweetman, Natureflex Manager of Innovia Films)
- "The dynamic development will continue – especially for films" (Dietmar Heufel, Ecoflex Manager of BASF)
- "The market development brought us to double our capacity by end of 2007" (Stefano Facco, New Business Development Manager of Novamont)
- "We at Treofan do business in both areas – traditional fossil plastics and bioplastics. We can see already a dramatic shift towards sustainable packaging made of annually renewable resources" (Frank Ernst, Business Development Manager at Treofan)

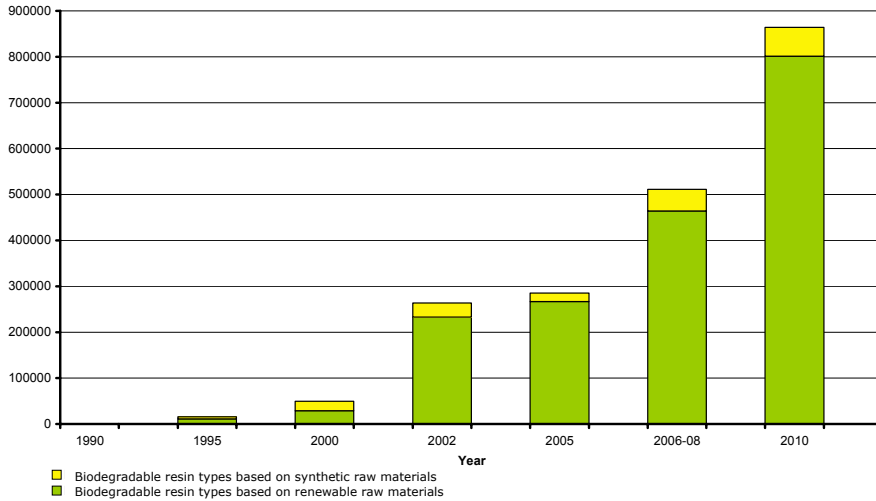
3

Progress in Material Development

- Expanding the range of bioplastic resins:
 - Ecovio (BASF)
 - Origo-Bi (Novamont)
 - BIOPAR and BIOPAREN (BIOP)
 - PHA grades announced (Metabolix/ADM)
 - Sorona, Hytrel (Dupont)
 - FKUR: PLA blends
- New manufacturing capacities (realisation 2006-2007):
 - BIOP (10,000 t; D)
 - Novamont (20,000 t; Biorefinery, I)
 - ADM/Metabolix (50,000 t; USA)
 - Plantic (10,000 t)

4

Development of Global Production Capacity



5

Novamont announces realisation of a biorefinery



6

Progress in product development

- New PLA films with HDPE properties (FKuR)
- White PLA films, self adhesive labels (Treofan)
- Metalised film from Cellulose (Innovia Films) or PLA (Treofan)
- Fully compostable labels from paper or PLA (natura)
- Peelable PLA lid films (Treofan)
- Foamed bioplastic trays (Coopbox, Sirap Gema)
- First completely biodegradable bottle (introduced by Ihr Platz)
- Full range of master batches for PLA and starch based materials (PolyOne, Sukano)

7

Packaging end users (selection)

- Belgium: Delhaize, Carrefour
- UK: Sainsbury's, Tesco, Marks & Spencer, ...
- Italy: Coop, Carrefour, Iper
- Germany: Rewe, Edeka, Tegut
- Netherlands: Albert Heijn
- Austria: Spar
- Brands: Nestlé (UK), Underberg (D)



8

Ihr Platz: Fully biodegradable PLA bottles launched in D



9

Nestlé: Launch of the first praliné tray in UK



10

Trend: Organic packaging for fresh organic produce

(here A. Heijn, man examples at EU retail)



11



12

Trend: Biobags, usable as organic waste bage



13

Label for certified compostable bioplastics products
EU wide introduction planned; in use in D, CH, NL, UK



14

Questions?

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