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Industry Report

Manufacture of rubber and
plastic products

2016

ROMANIA

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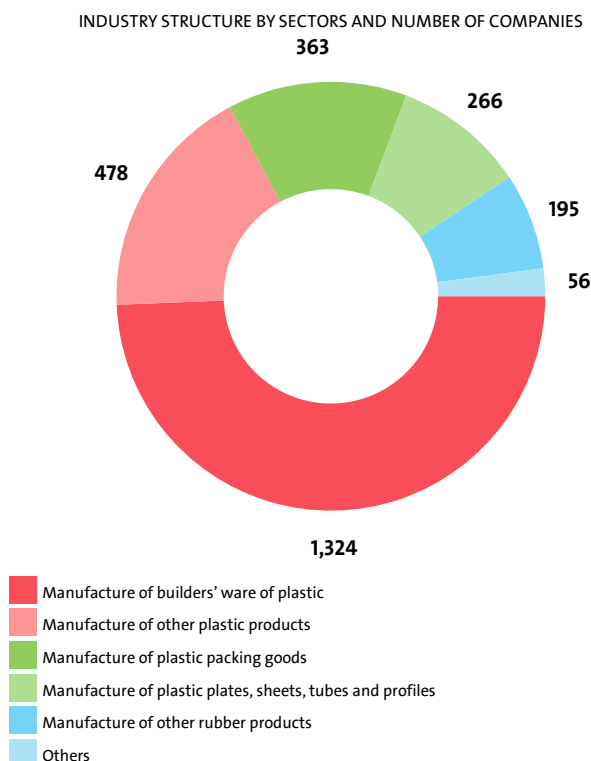
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I. KEY INDICATORS

- The Manufacture of rubber and plastic products industry in Romania was represented by 2,682 companies at the end of 2016, compared to 2,617 in the previous year and 2,554 in 2014.
- The industry's net profit amounted to RON 1,945,292,085 in 2016.
- The industry's total revenue was RON 22,806,178,415 in 2016, up by 5.95% compared to the previous year.
- The combined costs of the companies in the Manufacture of rubber and plastic products industry reached RON 20,495,003,921 in 2016, up by 4.85% year-on-year.
- The industry's total revenue makes up 2.45% to the country's Gross domestic product (GDP) in 2016, compared to 2.50% for 2015 and 2.38% in 2014.
- A total of 57,868 people were employed in the Manufacture of rubber and plastic products industry in 2016, compared to 54,996 in 2015 and 50,660 in 2014.
- Most of the companies in the industry are based in Bucharest, followed by Cluj and Brasov.

II. INTRODUCTION

In 2016 the companies in the Manufacture of rubber and plastic products industry numbered 2,682, distributed in 6 sectors.



In 2015 there were a total of 2,617 companies operating in the

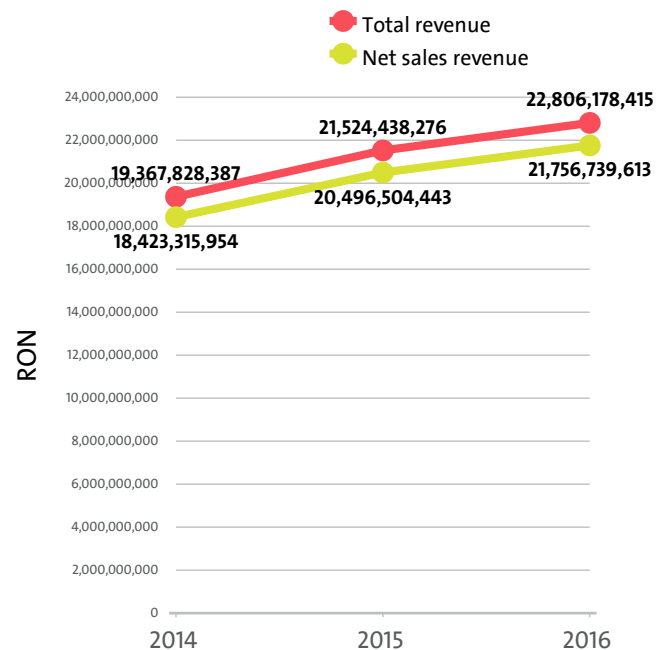
industry. In 2014 their number totalled 2,554.

NUMBER OF COMPANIES IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS INDUSTRY BY SECTORS

SECTOR	2016	2015	2014
MANUFACTURE OF BUILDERS' WARE OF PLASTIC	1,324	1,252	1,216
MANUFACTURE OF OTHER PLASTIC PRODUCTS	478	470	458
MANUFACTURE OF PLASTIC PACKING GOODS	363	360	349
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	266	263	259
MANUFACTURE OF OTHER RUBBER PRODUCTS	195	213	207
MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	56	59	65

III. REVENUES

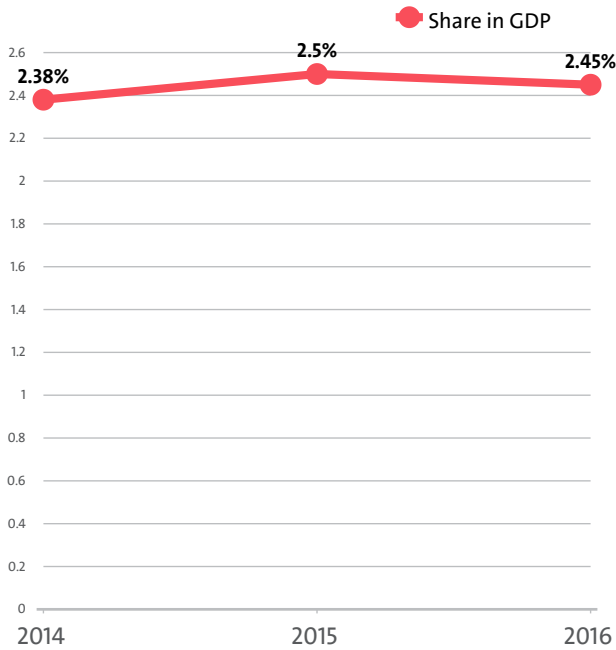
The total revenue in the industry was RON 22,806,178,415 in 2016, RON 21,524,438,276 in 2015 and 19,367,828,387 in 2014.



The companies in the Manufacture of rubber and plastic products market of Romania earned combined net sales revenues of RON 21,756,739,613 in 2016.

In annual terms, sales marked a growth of 6.15% compared to 2015. In comparison to 2014 they grew by 18.09%. In 2015 sales increased by 11.25% year-on-year.

The Manufacture of rubber and plastic products industry total revenue make up 2.45% to the country's GDP in 2016, compared to 2.50% for 2015 and 2.38% in 2014.

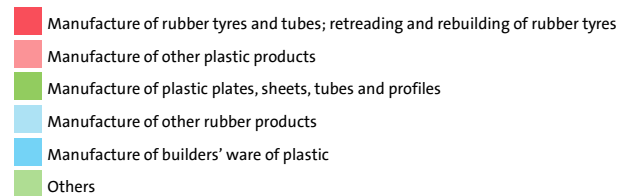
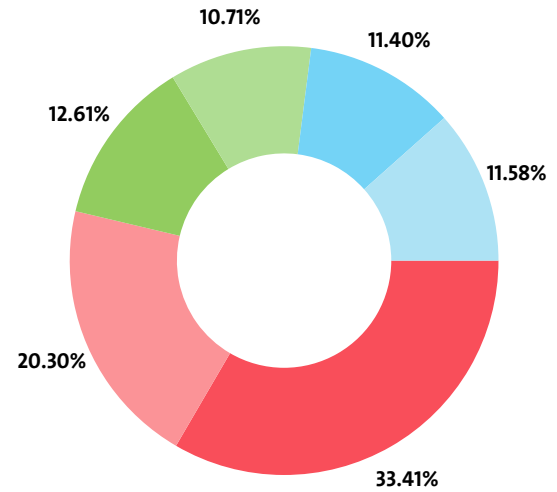


We expect, based on the trend in the last three years, the total revenue of the Manufacture of rubber and plastic products industry to change at a compound annual growth rate (CAGR) of 8.51% in 2017.

NET SALES REVENUE BY SECTORS

RANK	SECTOR	NET SALES REVENUE (RON)
1	MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	7,268,366,772
2	MANUFACTURE OF OTHER PLASTIC PRODUCTS	4,416,613,029
3	MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	2,742,857,098
4	MANUFACTURE OF OTHER RUBBER PRODUCTS	2,519,666,006
5	MANUFACTURE OF BUILDERS' WARE OF PLASTIC	2,479,449,812
6	MANUFACTURE OF PLASTIC PACKING GOODS	2,329,786,896

INDUSTRY'S NET SALES REVENUE STRUCTURE BY SECTORS



The highest growth, of 13.92%, was recorded by Manufacture of other plastic products, while Manufacture of plastic plates, sheets, tubes and profiles registered the sharpest decline, of 9.24%.

TOP COMPANIES' REVENUE BY SECTORS

SEGMENT	COMPANY	TOTAL REVENUE (RON)	NET SALES REVENUE (RON)
MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES			
	CONTINENTAL AUTOMOTIVE PRODUCTS SRL	2,988,694,846	2,970,479,739
	MICHELIN ROMANIA SA	2,280,583,444	2,163,704,892
	PIRELLI TYRES ROMANIA SRL	1,965,208,537	1,860,674,582
MANUFACTURE OF OTHER PLASTIC PRODUCTS			
	VALEO LIGHTING INJECTION SA	785,749,096	756,913,580
	VIMERCATI EAST EUROPE SRL	189,568,589	185,476,485
	METAPLAST SRL	168,851,535	166,177,397
MANUFACTURE OF OTHER RUBBER PRODUCTS			
	CONTITECH FLUID AUTOMOTIVE ROMANIA SRL	629,714,683	617,699,671
	HUTCHINSON SRL	437,894,109	429,204,004
	CONTITECH THERMOPOL ROMANIA SRL	223,666,881	222,733,299
MANUFACTURE OF PLASTIC PACKING GOODS			
	ROMCARBON SA	198,170,501	181,195,934
	GREIF FLEXIBLES ROMANIA SRL	145,012,031	143,273,623
	GUALA PACK NADAB SRL	120,567,513	118,759,815
MANUFACTURE OF BUILDERS' WARE OF PLASTIC			
	CASA NOASTRA S.A.	236,406,944	218,593,982
	MADRUGADA COM SRL	133,847,723	123,929,570
	ELECTRIC PLUS SRL	108,047,279	103,859,930
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES			
	TERAPLAST SA	276,427,574	257,296,114
	VALROM INDUSTRIE SRL	230,929,819	217,675,712
	HIPAC ROMANIA SRL	125,954,036	121,585,939

The top 10 companies in terms of total revenue in

Manufacture of rubber and plastic products accounted for 44.09% of the industry's total in 2016, 44.70% in 2015 and 47.20% in 2014.

TOP 10 COMPANIES BY TOTAL AND NET SALES REVENUE IN THE INDUSTRY

RANK	COMPANY	TOTAL REVENUE (RON)	NET SALE REVENUE (RON)
1	CONTINENTAL AUTOMOTIVE PRODUCTS SRL	2,988,694,846	2,970,479,739
2	MICHELIN ROMANIA SA	2,280,583,444	2,163,704,892
3	PIRELLI TYRES ROMANIA SRL	1,965,208,537	1,860,674,582
4	VALEO LIGHTING INJECTION SA	785,749,096	756,913,580
5	CONTITECH FLUID AUTOMOTIVE ROMANIA SRL	629,714,683	617,699,671
6	HUTCHINSON SRL	437,894,109	429,204,004
7	TERAPLAST SA	276,427,574	257,296,114
8	CASA NOASTRA S.A.	236,406,944	218,593,982
9	VALROM INDUSTRIE SRL	230,929,819	217,675,712
10	CONTITECH THERMOPOL ROMANIA SRL	223,666,881	222,733,299

The total revenues of the top 10 companies in the Manufacture of rubber and plastic products were 1.08% of GDP in 2016, compared to 1.12% for 2015 and 1.12% in 2014.

The top 10 by assets in the Manufacture of rubber and plastic products field made up RON 9,673,438,210, or 44.46% of the total net sales revenue.

TOP 10 BY TOTAL ASSETS IN THE INDUSTRY

RANK	COMPANY	RON
1	PIRELLI TYRES ROMANIA SRL	2,210,287,434
2	CONTINENTAL AUTOMOTIVE PRODUCTS SRL	1,583,541,358
3	MICHELIN ROMANIA SA	1,561,946,453
4	VALEO LIGHTING INJECTION SA	469,947,421
5	CONTITECH FLUID AUTOMOTIVE ROMANIA SRL	397,482,804
6	VALROM INDUSTRIE SRL	278,567,910
7	ROMCARBON SA	274,355,513
8	HUTCHINSON SRL	257,430,399
9	TERAPLAST SA	234,106,701
10	CASA NOASTRA S.A.	205,273,287

TOP 10 COMPANIES BY TOTAL REVENUE IN THE INDUSTRY MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES WERE:

COMPANY	RON
CONTINENTAL AUTOMOTIVE PRODUCTS SRL	2,988,694,846
MICHELIN ROMANIA SA	2,280,583,444
PIRELLI TYRES ROMANIA SRL	1,965,208,537
ELJ AUTOMOTIVE S.A.	168,287,606
JIFFY PACKAGING S.A.	62,584,489
INTERNATIONAL TYRES SRL	21,672,239
HANDLOPEX SRL	14,571,349
GALFIDO SRL	6,167,079
EXPRESS SERVICE ROTI SRL	2,407,738
ONIX SRL	2,288,138

The 10 largest companies in terms of total revenue in sector Manufacture of rubber and plastic products earned total revenue of RON 7,512,465,465 and accounted for 32.94% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE SECTOR MANUFACTURE OF OTHER PLASTIC PRODUCTS WERE:

COMPANY	RON
VALEO LIGHTING INJECTION SA	785,749,096
VIMERCATI EAST EUROPE SRL	189,568,589
METAPLAST SRL	168,851,535
DELTA INVEST SRL	150,607,947
VERNICOLOR SRL	141,859,041
STAR EAST PET SRL	135,979,337
AUSTRIA CARD SRL	130,818,309
ROECHLING AUTOMOTIVE PITESTI SRL	111,066,978
PERPLASTIC COMPOUNDING SRL	109,678,818
STERK PLAST SRL	109,666,475

The 10 largest companies in terms of total revenue in sector Manufacture of rubber and plastic products earned total revenue of RON 2,033,846,125 and accounted for 8.92% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE FIELD MANUFACTURE OF OTHER RUBBER PRODUCTS WERE:

COMPANY	RON
CONTITECH FLUID AUTOMOTIVE ROMANIA SRL	629,714,683
HUTCHINSON SRL	437,894,109
CONTITECH THERMOPOL ROMANIA SRL	223,666,881
SUMIRIKO AVS ROMANIA SRL	219,776,116
OECHSLER ROMANIA SRL	157,621,378
ARTEGO SA	153,763,215
OPTIBELT POWER TRANSMISSION SRL	134,759,771
CAUCHO METAL PRODUCTOS SRL	123,857,081
V.M. COMP SRL	42,331,921
RONERA RUBBER SA	41,555,031

The 10 largest companies in terms of total revenue in sector Manufacture of rubber and plastic products earned total revenue of RON 2,164,940,186 and accounted for 9.49% of the industry's total revenue.

TOP 10 COMPANIES BY TOTAL REVENUE IN THE MARKET MANUFACTURE OF PLASTIC PACKING GOODS WERE:

COMPANY	RON
ROMCARBON SA	198,170,501
GREIF FLEXIBLES ROMANIA SRL	145,012,031
GUALA PACK NADAB SRL	120,567,513
PLASTIPAK ROMANIA SRL	110,479,119
GREINER PACKAGING SRL	82,121,548
THRACE GREINER PACKAGING SRL	82,082,841
ARTEMA PLAST SRL	68,709,807
LIVINGJUMBO INDUSTRY SA	68,664,231
MULTIVAC ROMANIA SRL	68,389,666
BALCANIC PROD SRL	62,464,469

The 10 largest companies in terms of total revenue in sector Manufacture of rubber and plastic products earned total revenue of RON 1,006,661,726 and accounted for 4.41% of the industry's total revenue.

**TOP 10 COMPANIES BY TOTAL REVENUE IN THE MARKET
MANUFACTURE OF BUILDERS' WARE OF PLASTIC WERE:**

COMPANY	RON
CASA NOASTRA S.A.	236,406,944
MADRUGADA COM SRL	133,847,723
ELECTRIC PLUS SRL	108,047,279
GEALAN ROMANIA SRL	102,686,549
ROMCO SYSTEM SRL	100,478,699
OPTIMEDIA SRL	85,725,296
MAR & PET GRUP SRL	70,526,109
MARTPLAST SRL	64,128,530
FAR EST WINDOWS SRL	53,475,338
G.M. DEVELOPEMENT SRL	48,156,391

The 10 largest companies in terms of total revenue in sector Manufacture of rubber and plastic products earned total revenue of RON 1,003,478,858 and accounted for 4.40% of the industry's total revenue.

**TOP 10 COMPANIES BY TOTAL REVENUE IN THE MARKET
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND
PROFILES WERE:**

COMPANY	RON
TERAPLAST SA	276,427,574
VALROM INDUSTRIE SRL	230,929,819
HIPAC ROMANIA SRL	125,954,036
SCHLEMMER ROMANIA SRL	118,128,643
PET STAR HOLDING SRL	114,466,680
PHOENIX MECANO PLASTIC SRL	114,147,440
AUSTROTHERM COM SRL	100,391,349
SOGEFI AIR&COOLING SRL	96,412,835
VALPLAST INDUSTRIE SRL	92,794,745
TEHNO WORLD SRL	87,243,212

The 10 largest companies in terms of total revenue in sector Manufacture of rubber and plastic products earned total revenue of RON 1,356,896,333 and accounted for 5.95% of the industry's total revenue.

IV. EXPENSES

The combined costs of the companies in the Manufacture of rubber and plastic products industry reached RON 20,495,003,921 in 2016.

In annual terms, total expenses went up by 4.85% compared to 2015 and increased by 15.47% in comparison to 2014.

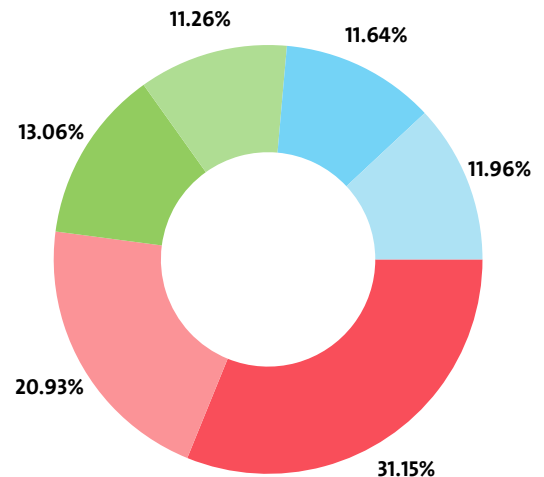
We expect, based on the trend in the last three years, the total costs of the Manufacture of rubber and plastic products industry to change at a compound annual growth rate (CAGR) of 7.46% in 2017.

TOTAL COSTS BY SECTORS

RANK	SECTOR	TOTAL COSTS (RON)
1	MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	6,384,925,923
2	MANUFACTURE OF OTHER PLASTIC PRODUCTS	4,289,187,876
3	MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	2,676,461,835
4	MANUFACTURE OF BUILDERS' WARE OF PLASTIC	2,451,191,681

5	MANUFACTURE OF OTHER RUBBER PRODUCTS	2,386,081,864
6	MANUFACTURE OF PLASTIC PACKING GOODS	2,307,154,742

INDUSTRY'S TOTAL COSTS STRUCTURE BY SECTORS



- Manufacture of rubber tyres and tubes; retreading and rebuilding of rubber tyres
- Manufacture of other plastic products
- Manufacture of plastic plates, sheets, tubes and profiles
- Manufacture of builders' ware of plastic
- Manufacture of other rubber products
- Others

Manufacture of other plastic products marked the highest annual growth in total expenses, of 16.19%, while total expenses went down the most, by 8.33%, for Manufacture of plastic plates, sheets, tubes and profiles.

The biggest spenders in the industry, with costs of over 10% of industry's costs, numbered 9, including VALROM INDUSTRIE SRL, CASA NOASTRA S.A., CONTITECH FLUID AUTOMOTIVE ROMANIA SRL, VALEO LIGHTING INJECTION SA, MICHELIN ROMANIA SA. The medium spenders, or those in the 5% and 10% range count 21 and include OPTIBELT POWER TRANSMISSION SRL, PLASTIPAK ROMANIA SRL, SUMIRIKO AVS ROMANIA SRL, ROMCARBON SA, CAUCHO METAL PRODUCTOS SRL. Below 5% threshold are 2,652 companies, including GREINER ASSISTEC SOCIETATE CU RASPUNDERE LIMITATA, FLEXOPRINT SRL, BALEANU YANISEBY TERMOIZOLANT SRL, CLAUDIA IMPEX SRL, KIRON INVEST SRL.

Employment expenses in the Manufacture of rubber and plastic products industry grew by 18.23% on the year to RON 2,332,527,002 in 2016.

The highest growth in labour costs, of 31.00%, was registered by Manufacture of plastic packing goods.

The monthly costs per employee in the Manufacture of rubber and plastic products industry averaged RON 3,359 in 2016, RON 2,989 in 2015 and RON 2,804 in 2014.

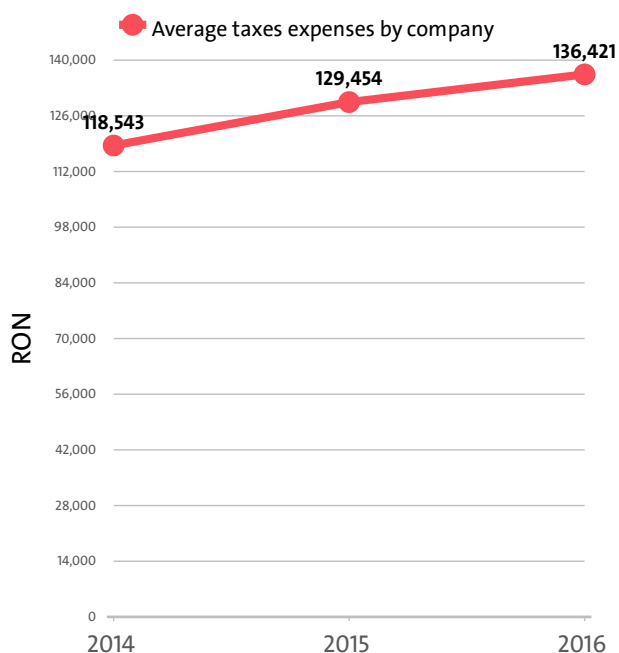
EMPLOYMENT EXPENSES IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS BY SECTORS IN 2016

RANK	SECTOR	EMPLOYMENT EXPENSES (RON)	AVERAGE EXPENSES PER EMPLOYEE (RON)
1	MANUFACTURE OF OTHER PLASTIC PRODUCTS	603,721,549	38,735
2	MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	542,105,245	59,318
3	MANUFACTURE OF OTHER RUBBER PRODUCTS	334,326,844	41,640
4	MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	290,337,771	45,210
5	MANUFACTURE OF BUILDERS' WARE OF PLASTIC	288,324,060	26,478
6	MANUFACTURE OF PLASTIC PACKING GOODS	273,711,533	35,078

THE TOP 10 COMPANIES BY AVERAGE MONTHLY COSTS PER EMPLOYEE IN THE INDUSTRY

RANK	COMPANY	RON
1	PRODUCTIE PRESTARI SERVICII COMERT AGER SRL	78,884
2	SEAL MAKER & SYSTEMS RO SRL	17,611
3	ARCON CORINA GEALAN SRL	9,783
4	OBRIST EASTERN EUROPE SRL	9,385
5	RESILUX SOUTH EAST EUROPE SRL	9,094
6	BERICAP ROMANIA SRL	9,005
7	HIPAC ROMANIA SRL	8,669
8	SUD - EST GROUP SRL	8,195
9	MDS SEALS SRL	7,812
10	MULTIVAC ROMANIA SRL	7,679

The industry's tax expenses stood at RON 365,882,409 in 2016. In 2015 it paid taxes of RON 338,783,570. In 2014 the industry paid RON 302,760,937 in taxes.



EXPENSES ON TAXES BY SECTORS

RANK	SECTOR	RON	Y/Y CHANGE
1	MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	190,422,266	10.52%
2	MANUFACTURE OF OTHER PLASTIC PRODUCTS	60,174,118	8.80%
3	MANUFACTURE OF OTHER RUBBER PRODUCTS	37,869,342	1.35%
4	MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	30,311,339	-15.76%
5	MANUFACTURE OF BUILDERS' WARE OF PLASTIC	24,115,231	19.99%
6	MANUFACTURE OF PLASTIC PACKING GOODS	22,990,113	29.57%

V. PROFITABILITY

The industry's net profit amounted to RON 1,945,292,085 in 2016, compared to a net profit of RON 1,637,986,306 in 2015 and a net profit of RON 1,315,720,776 in 2014.

TOP 10 COMPANIES BY HIGHEST NET PROFIT IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS

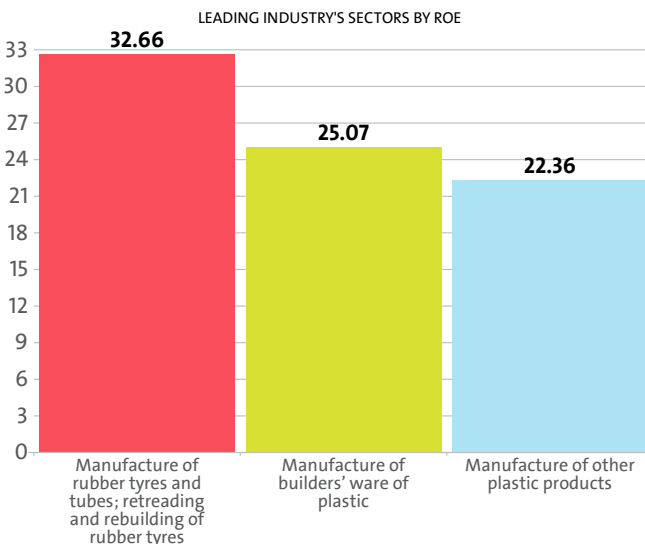
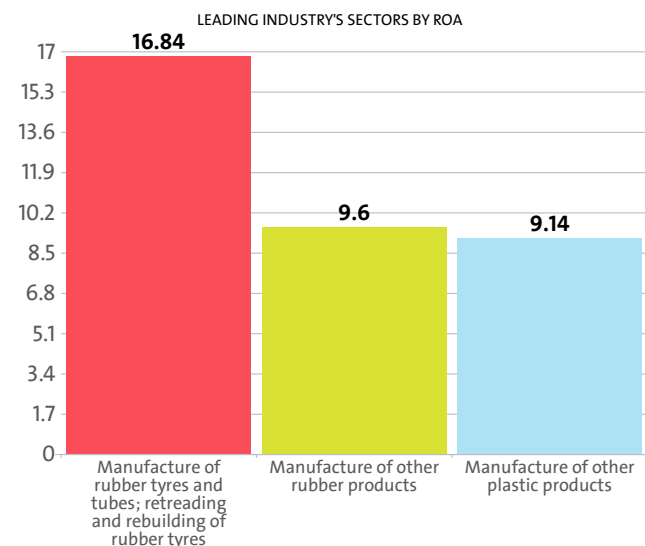
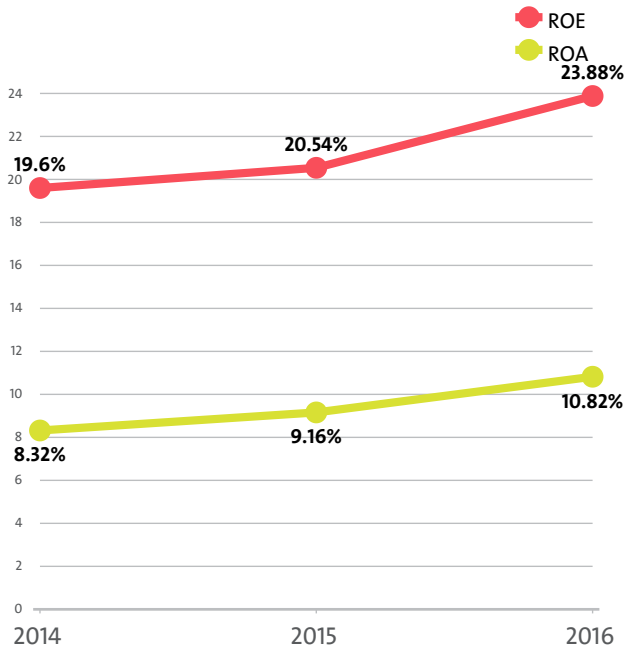
RANK	COMPANY	RON
1	CONTINENTAL AUTOMOTIVE PRODUCTS SRL	755,557,217
2	MICHELIN ROMANIA SA	103,705,009
3	PIRELLI TYRES ROMANIA SRL	78,076,168
4	CONTITECH FLUID AUTOMOTIVE ROMANIA SRL	54,710,266
5	HUTCHINSON SRL	48,515,108
6	TERAPLAST SA	41,511,533
7	ROECHLING AUTOMOTIVE PITESTI SRL	28,641,902
8	STERK PLAST SRL	25,594,972
9	MAGNA EXTERIORS (CRAIOVA) SRL	23,882,361
10	VIMERCATI EAST EUROPE SRL	23,208,141

TOP COMPANIES BY HIGHEST NET LOSS IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS

RANK	COMPANY	RON
1	SUPERLIT ROMANIA SA	6,256,807
2	ROSTI ROMANIA SRL	5,274,235
3	NAPOCHIM SA	4,325,280
4	ARCON CORINA GEALAN SRL	4,231,916
5	CIKAUTXO RO RUBBER & PLASTIC SRL	3,438,994

The Manufacture of rubber and plastic products industry's return on equity (ROE) is 23.88% compared to 20.54% in 2015 and 19.60% in 2014.

The Manufacture of rubber and plastic products's return on assets (ROA) was 10.82%, while in 2015 it amounted to 9.16% and 8.32% in 2014.



TOP 10 COMPANIES BY HIGHEST AVERAGE NET PROFIT PER EMPLOYEE IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS

RANK	COMPANY	RON	COMPANY HEADQUARTERS (CITY)
1	PRODUCTIE PRESTARI SERVICII COMERT AGER SRL	1,694,665	COVASNA
2	BONTODO CONSULTANT SRL	971,800	MURES
3	SECOR PPBAGS SRL	821,462	PRAHOVA
4	ROECHLING AUTOMOTIVE PITESTI SRL	572,838	ARGES
5	SCHLEICH EAST EUROPE MANUFACTURING SRL	553,811	BUCHAREST
6	KARPLASTIK SRL	487,358	CLUJ
7	IDEAL PLAST & MOULD SRL	418,359	BUCHAREST
8	CERAMICA MTZ S.A.	392,971	SALAJ
9	SORIN CARTONGESSO SRL	363,945	NEAMT
10	TERMOSISTEM EHP SRL	312,350	TELEORMA

About 20.00% of the 10 leading companies in terms of net profit per employee are located in Bucharest, while 10.00% are Cluj-based and 10.00% are headquartered in Teleorman.

The average net sales revenue per employee in the Manufacture of rubber and plastic products industry amounted to RON 375,972 in 2016, up by 0.88% compared to 2015 and up by 3.38% compared to 2014.

The Manufacture of rubber and plastic products field generated an average RON 394,107 in total revenue per employee. In 2015 and 2014 the figure was RON 391,382 and RON 382,310, respectively.

The average total revenue per company in the Manufacture of rubber and plastic products industry increased to RON 8,503,422 in 2016 from RON 8,224,852 in 2015. The 2014 value was RON 7,583,331.

A company in the Manufacture of rubber and plastic products sector made on average a net sales revenue of RON 8,112,133 in 2016, compared to RON 7,832,061 in 2015 and RON 7,213,514 in 2014.

The Manufacture of rubber and plastic products industry made 1.83% of the overall sales country-wide, rising its market share by 0.04 pp.

AVERAGE REVENUES PER EMPLOYEE IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF EMPLOYEES
MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	795,313	822,917	9,139
MANUFACTURE OF OTHER PLASTIC PRODUCTS	283,371	300,314	15,586
MANUFACTURE OF OTHER RUBBER PRODUCTS	313,821	326,229	8,029
MANUFACTURE OF PLASTIC PACKING GOODS	298,576	317,165	7,803
MANUFACTURE OF BUILDERS' WARE OF PLASTIC	227,702	240,400	10,889
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	427,103	450,484	6,422

AVERAGE REVENUE PER COMPANY IN MANUFACTURE OF RUBBER AND PLASTIC PRODUCTS IN 2016

SECTOR	AVERAGE NET SALES REVENUE (RON)	AVERAGE TOTAL REVENUE (RON)	NUMBER OF COMPANIES
MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	129,792,264	134,297,036	56
MANUFACTURE OF OTHER RUBBER PRODUCTS	12,921,364	13,432,267	195
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	10,311,493	10,875,961	266
MANUFACTURE OF OTHER PLASTIC PRODUCTS	9,239,776	9,792,242	478
MANUFACTURE OF PLASTIC PACKING GOODS	6,418,146	6,817,732	363
MANUFACTURE OF BUILDERS' WARE OF PLASTIC	1,872,696	1,977,129	1,324

The total indebtedness of the companies in the Manufacture of rubber and plastic products industry was RON 9,131,148,708 versus RON 8,492,426,505 a year ago. In 2014 the industry's indebtedness totalled RON 8,603,935,790.

INDUSTRY'S INDEBTEDNESS BY SECTORS (RON)

SECTOR	2016	2015	2014
MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	2,492,682,580	2,519,716,514	2,895,177,834
MANUFACTURE OF OTHER PLASTIC PRODUCTS	1,944,579,842	1,778,686,571	1,417,343,058
MANUFACTURE OF PLASTIC PACKING GOODS	1,326,228,296	1,193,046,407	1,151,968,703
MANUFACTURE OF BUILDERS' WARE OF PLASTIC	1,250,873,670	965,433,803	1,171,944,648
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	1,152,732,416	1,195,106,511	1,201,134,885
MANUFACTURE OF OTHER RUBBER PRODUCTS	964,051,904	840,436,699	766,366,662

Debt-to-assets ratio of the companies in the industry is 0.51 in 2016. It was 0.47 in 2015 and 0.54 in 2014.

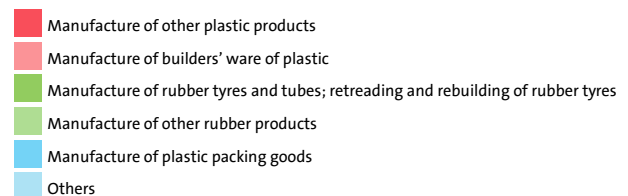
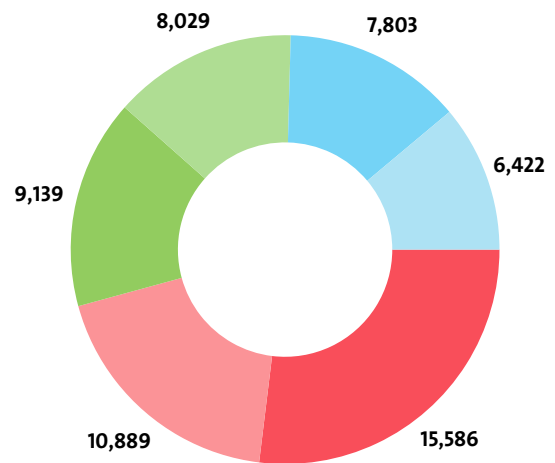
VI. EMPLOYMENT

A total of 57,868 people were employed in the Manufacture of rubber and plastic products industry at the end of 2016, compared to 54,996 in 2015 and 50,660 in 2014.

NUMBER OF EMPLOYEES BY INDUSTRY SECTORS

SECTOR	NUMBER	SHARE OF INDUSTRY TOTAL
MANUFACTURE OF OTHER PLASTIC PRODUCTS	15,586	26.93%
MANUFACTURE OF BUILDERS' WARE OF PLASTIC	10,889	18.82%
MANUFACTURE OF RUBBER TYRES AND TUBES; RETREADING AND REBUILDING OF RUBBER TYRES	9,139	15.79%
MANUFACTURE OF OTHER RUBBER PRODUCTS	8,029	13.87%
MANUFACTURE OF PLASTIC PACKING GOODS	7,803	13.48%
MANUFACTURE OF PLASTIC PLATES, SHEETS, TUBES AND PROFILES	6,422	11.10%

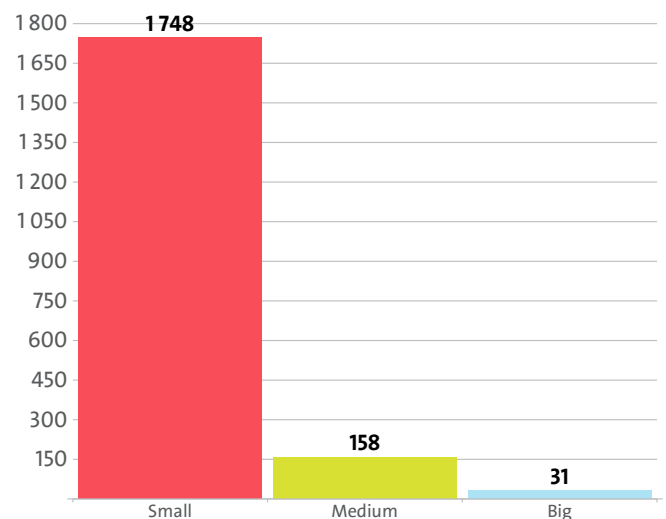
ALLOCATION OF EMPLOYEES BY INDUSTRY'S SECTORS



The analysis on companies' sizes by the number of employees, shows that 1748 firms have less than 50 employees*, 158 have between 50 and 250 employees* and 31 companies employ more than 250*.

* Companies without data in the number of employees at end of the year are not taken into consideration.

COMPANIES IN THE INDUSTRY BY SIZE IN TERMS OF NUMBER OF EMPLOYEES



The employees of the leading 10 companies in terms of numbers make up 27.47% of the workforce in the industry in 2016.

TOP 10 COMPANIES BY SHARE IN INDUSTRY'S TOTAL NUMBER OF EMPLOYEES

RANK	COMPANY	NUMBER OF EMPLOYEES	SHARE
1	MICHELIN ROMANIA SA	3,022	5.22%
2	PIRELLI TYRES ROMANIA SRL	2,751	4.75%
3	CONTINENTAL AUTOMOTIVE PRODUCTS SRL	2,445	4.23%
4	CONTITECH FLUID AUTOMOTIVE ROMANIA SRL	1,631	2.82%
5	VALEO LIGHTING INJECTION SA	1,311	2.27%
6	CASA NOASTRA S.A.	1,071	1.85%
7	HUTCHINSON SRL	1,068	1.85%
8	ARTEGO SA	964	1.67%
9	ROMCARBON SA	885	1.53%
10	GREIF FLEXIBLES ROMANIA SRL	749	1.29%

The Manufacture of rubber and plastic products industry is the 20th largest employer in the country with 57,868 employees with the largest employer being Retail trade, except of motor vehicles and motorcycles with 437,697 and Activities of extraterritorial organisations and bodies at the bottom with 1 employees.

We expect, based on the trend in the last three years, the number of employees of the Manufacture of rubber and plastic products industry to change at a compound annual growth rate (CAGR) of 6.88% in 2017.

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