

PLASTICS Transportation & Industrial Plastics Committee Meetings

October 10, 2019

Embassy Suites by Hilton Detroit Troy Auburn Hills

Troy, Michigan

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*The October TIP Meeting is scheduled at the conclusion of the SPE Automotive TPO Conference.*

**Thursday, October 10, 2019**

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| 8:00am-8:30am   | <b>REGISTRATION</b>                                                                                                                                                                                                                                                                                                                                                                                                             |
| 8:30am-8:40am   | Call to Order, Fire Exits, PLASTICS Antitrust Policy, Introductions<br><b>Michael Cirone, Chair</b>                                                                                                                                                                                                                                                                                                                             |
| 8:40m-8:45am    | Approval of Minutes, Review of the Agenda and Deliverables<br><b>Michael Cirone, Chair</b>                                                                                                                                                                                                                                                                                                                                      |
| 8:45am-9:45am   | <b>Automotive Industry: Insights, Megatrends, Vinyl Compounds &amp; Innovation</b><br><b>Jean-Francois Vautrin, General Manager-Automotive Interior for NAKAN, a Westlake Company</b><br><br>Jean-Francois will talk about vinyl compounds for automotive interiors, offering business insights and megatrends around electrification, autonomous, the shared economy, connected vehicles and the drive towards zero emissions. |
| 9:45am-10:15am  | <b>Automotive End of Life Vehicles (ELV) Recycling Demonstration Project – outreach to Collision and Repair industries</b><br><b>Kendra L. Martin, PLASTICS</b><br><br>– Auto Repair Shops / Collision Industry efforts, tracking of bumper availability ....<br>– On-going exploration of potential end-use markets and users                                                                                                  |
| 10:15am-10:30am | <b>COFFEE BREAK</b>                                                                                                                                                                                                                                                                                                                                                                                                             |

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| 10:30am-10:45am                           | <p><b>PLASTICS Sustainability Advisory Board (SAB) Report</b><br/> <i>Eric Connell, Toyota (TIP SAB Rep)</i><br/>           PLASTICS Sustainability Benchmarking Tool Update</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 10:45am-11:30am                           | <p><b>PLASTICS Sustainability &amp; Recycling Committee Report</b><br/> <i>Kim Holmes, Vice President of Sustainability, PLASTICS</i></p> <ul style="list-style-type: none"> <li>• Sustainability Benchmarking Survey</li> <li>• Pacific Northwest Secondary Sorting Demonstration Project</li> <li>• Infrastructure Funding Efforts</li> <li>• Refocus 2020</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 11:30am-12:15pm                           | <p><b>LUNCH</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 12:15pm-1:00pm                            | <p><b>Economic Issues Affecting Plastics in Transportation</b><br/> <i>Dr. Perc Pineda, Chief Economist, PLASTICS</i></p> <p>The global economy is projected to grow 3.5 percent in 2020, and has implications for the global automotive industry. Current economic issues such as trade and tariffs if unresolved will spill over to 2020 generating risks for companies in the plastics industry serving the automotive end market. In North America, auto production has decreased. While Mexico ratified USMCA, the U.S. and Canada are still to approve the North American free trade pact. The world's largest automotive market – China – has shown visible signs of weakening – not only in its macroeconomy but in automotive sales.</p> <p>By the looks of it, 2020 may prove to be a challenging year for the automotive industry as weak demand continues against the backdrop of technological enhancements spearheaded by automotive industry's key players to stay head of the competition. But the industry continues to evolve. Perc Pineda, PLASTICS Chief Economist, will share his insights why opportunities for plastics will continue next year and beyond.</p> |
| 1:00pm-1:45pm<br><i>(time permitting)</i> | <p><b>TIP Business Roundtable: Supply Chain Emerging Issues, Industry Trends, Benchmarking Ideas and Opportunities, Sustainability Challenges, Industry Needs and ideas for potential TIP Projects, etc.</b></p> <p>This Roundtable is structured to hear from attendees in each supply chain segment as a group: equipment manufacturers, material suppliers, Tier 1 companies and processors, brand owners, OEMs, and recyclers.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| 1:45pm-1:55pm                             | <p><b>TIP Next Steps</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

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|               | <ul style="list-style-type: none"> <li>• Review TIP Issues &amp; Activities</li> <li>• Planning – topics, speakers – for Next Meeting</li> <li>• 2020 Meeting Dates &amp; Locations <ul style="list-style-type: none"> <li>○ Ideas for co-location, hosts, field trips</li> <li>○ NOTE: November 2019 SPE Annual Automotive Awards Gala – individual TIP member participation</li> <li>○ Joint meeting w/FLiP (Future Leaders in Plastics)</li> <li>○ Refocus 2020 – May 18-20 in Cincinnati, OH</li> <li>○ NPE:2021 – May 16-22 in Orlando, Florida</li> </ul> </li> </ul> |
| 1:55pm-2:00pm | <b>Any Other Business</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 2:00pm        | <b>ADJOURN</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

#### **TIP Parking Lot**

*(on-going issues of interest identified at previous TIP meetings)*

- Ability to address automotive's big move to improved transparency and new systems
- Autonomous Vehicles and Mobility / plastic design considerations
- Bio-Plastics
- CA Prop 65 – impact on industry
- Design for Recycling / Design for Dismantling
- Electric Vehicles / plastic design considerations
- End of Life recycling/recyclability of materials
- Life Cycle Analysis (LCA)
- Lightweighting
- Material deselection
- Materials Infrastructure
- OEMs use of IMDS (International Materials Data System)
- Pyrolysis / Plastics-to-Fuel
- Regulatory updates, including European perspective
- RIC (ASTM Resin Identification Code)
- Workforce development
- Zero Waste efforts

*Goal – achieve integration within PLASTICS' framework and work with external organizations.*

## **PLASTICS INDUSTRY ASSOCIATION (PLASTICS) ANTITRUST REMINDERS AND MEETING GUIDELINES**

Group activities of competitors are inherently suspect under the antitrust laws. Many agreements and activities between and among competitors, however, are both legal and beneficial to society and the industry. It is expected that all member representatives involved in PLASTICS activities, as well as PLASTICS consultants and meeting participants, will be sensitive to the legal issues involving trade associations and take all measures necessary to comply with U.S. antitrust laws and similar foreign competition laws.

Whether seriously or in jest, **do not discuss** or exchange information regarding:

### **Prices, including:**

- Individual company prices, price changes, price differentials, pricing patterns or policies, discounts, allowances, credit terms, warranties, rebates or special financing, indemnification agreements, or other terms and conditions of sale affecting price.
- Industry pricing policies, price levels, price changes, pricing procedures, profit margins or other data that bear on price.
- Individual company data on costs, production, capacity, inventory, sales, profit margins or other data that bear on price.

### **Production, including:**

- Individual company plans concerning the design, production, distribution or marketing of particular products or product features, including possible or proposed customers or territories.
- Agreements with competitors to control or limit production, restrict or allocate exports or imports, control or limit product quality or research or allocate sales according to customers, territories or products.

### **Marketing procedures, including:**

- Matters relating to dealing or not dealing with actual or potential individual suppliers, customers, or competitors that might exclude them from the market;
- Territorial restrictions, allocations of customers, restrictions on types of products or any other kind of market division.

### **Meeting Guidelines**

- Agenda will be prepared and distributed before the start of the meeting.
- Meeting discussions will be limited to agenda items unless the Chair approves additional topics.
- Minutes of a meeting represent the legal record of what transpired. Carefully review draft minutes and call for corrections if the meeting minutes are not accurate.
- Staff (or counsel) will be present at each meeting.
- Object to any discussions or activities that appear to violate PLASTICS' antitrust policy.
- Avoid colloquial language that might be mis-characterized later (e.g., "dominance," "only game in town," "control of market").

This list is not exhaustive and understanding and acting in compliance with U.S. and foreign antitrust and competition laws sometimes can be difficult. If you have a question about the propriety of PLASTICS activities or discussions in a PLASTICS meeting, you are encouraged immediately to contact PLASTICS counsel or your company's legal counsel.

### **Confidentiality Reminder**

It is expected that all members of PLASTICS will act in the best interests of the association. Discussions at meetings and any documents or other materials that are produced or distributed are confidential. Details of the meeting should not be published, disclosed to any third parties, or used except in support of official PLASTICS business. Naturally, member company representatives can share this with appropriate personnel within their own companies; when distributing within your companies, please remind the recipients of the confidential nature of the information.