



# Brazil-USA WEBINAR

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# AGENDA

- ABOUT VALGROUP
- VALGROUP IN USA
- BRAZIL & USA - SIMILARITIES AND DIFFERENCES



# ABOUT US

FOUNDED IN 1976,  
FAMILY-OWNED

GLOBAL CAPACITY:  
600,000 TONNES  
PER YEAR

6 SITES  
27 PLANTS

5,000+  
EMPLOYEES

SOLID FINANCIAL  
POSITION

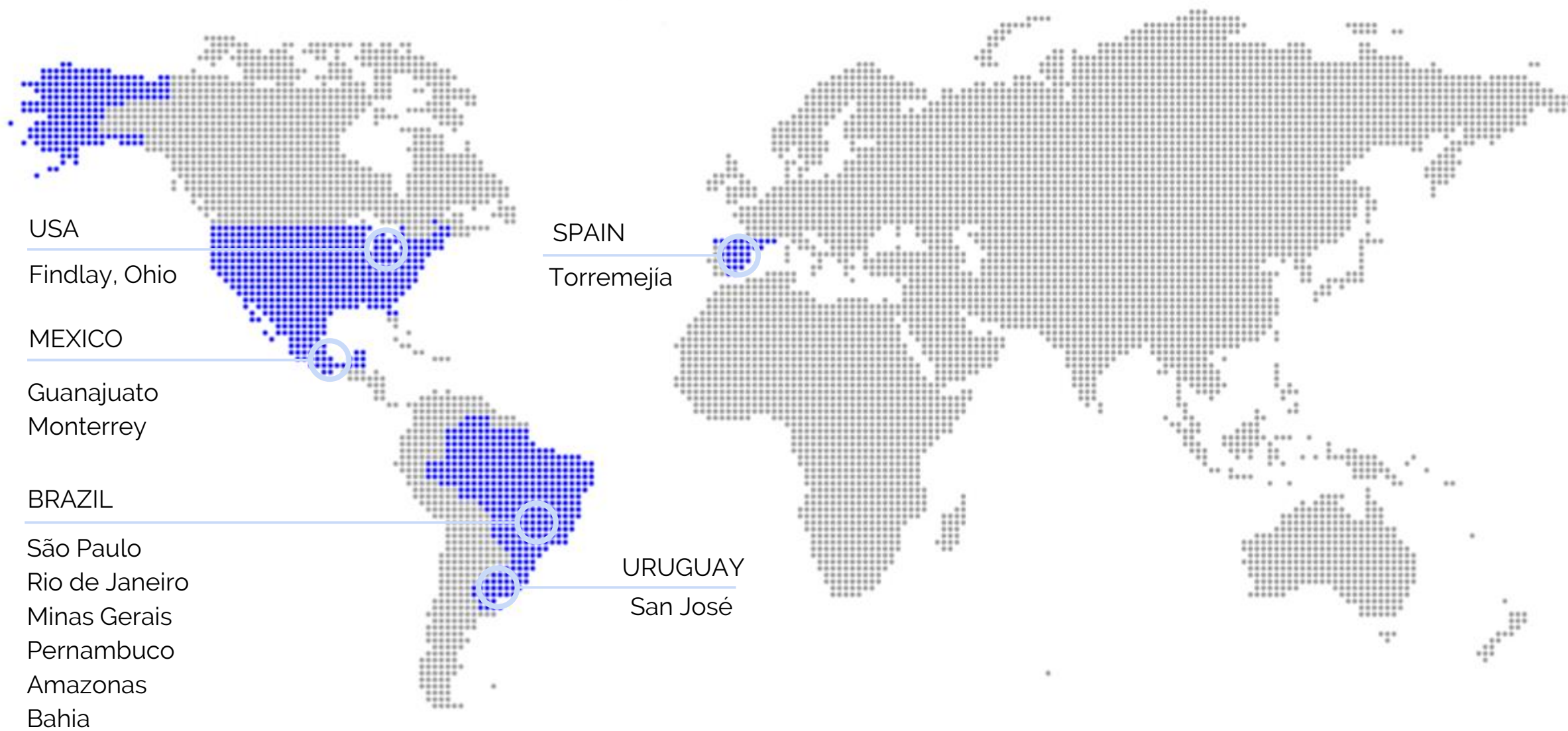
ROBUST  
CORPORATE  
GOVERNANCE

INNOVATIVE AND  
SUSTAINABLE  
SOLUTIONS





# WHERE WE ARE



# IN BRAZIL

## Presence in 06 states:

Amazonas - AM

Pernambuco - PE

Bahia - BA

Minas Gerais - MG

Rio de Janeiro - RJ

São Paulo - SP

MANAUS - AM

ITAMONTE - MG

ITANHANDU - MG

PASSA QUATRO - MG

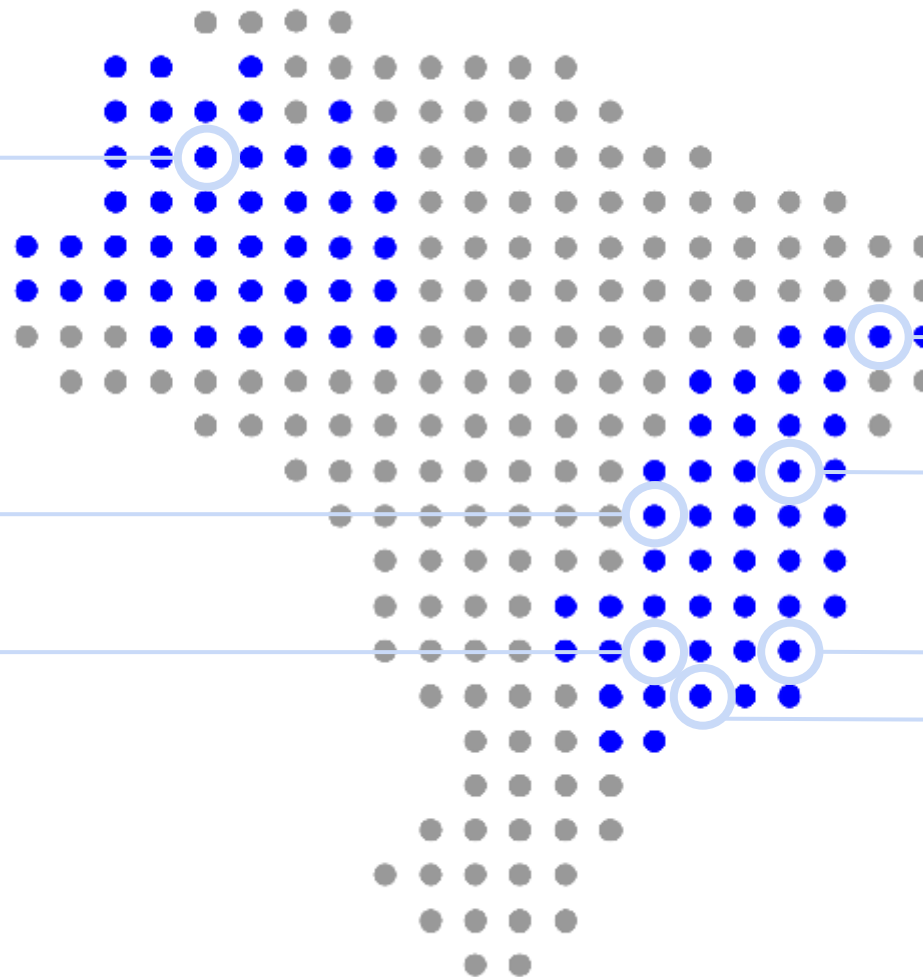
LORENA - SP

RECIFE - PE

CAMAÇARI - BA

RIO DE JANEIRO - RJ

SÃO PAULO - SP





**FLEXIBLE PACKAGING**



- STRETCH FILMS
- SHRINK BUNDLING FILMS
- BARRIER FILMS
- PLASTIC BAGS
- TECHNICAL FILMS
- FLEXOGRAPHIC PRINTING

- LAMINATED FILMS
- BOPP FILMS
- ROTOGRAVURE PRINTING
- FLEXOGRAPHIC PRINTING

**RIGID PACKAGING**



- PET AND HDPE BOTTLES
- PET PREFORMS

- PLASTIC CAPS

**RESINS AND ADDITIVES**



- PET – PCR RESIN

- WHITE MASTERBATCH
- CALCIUM CARBONATE COMPOUND
- PERFORMANCE ADDITIVES

# CUSTOMERS



# INNOVATION & SUSTAINABILITY



WE HAVE SIGNED THE  
NEW PLASTICS  
ECONOMY GLOBAL  
COMMITMENT





# VALGROUP IN USA



# VALGROUP IN USA

- FOUNDED IN 2015
- FINDLAY/OHIO
- CAPACITY: 48.000 TON/YEAR
- PRODUCT LINE: STRETCH FILMS, SHRINK BUNDLING FILMS AND SPECIALTY FILMS





# Valgroup in Findlay, Ohio





# BRASIL & USA SIMILARITIES AND DIFFERENCES





# SIMILARITIES AND DIFFERENCES



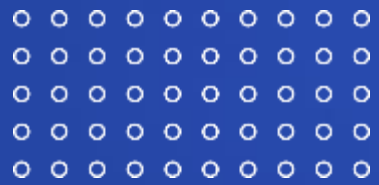
	BRAZIL	USA
People	<ul style="list-style-type: none"> <li>• Low turnover</li> <li>• More flexible</li> <li>• Cost less expensive (USD)</li> <li>• Salary + Cost/Benefits - add 1 salary</li> <li>• Work Legislation – protective</li> <li>• Plant operators: Monthly payment</li> <li>• Management: Monthly payment</li> </ul>	<ul style="list-style-type: none"> <li>• High turnover</li> <li>• Less flexible (job opportunities )</li> <li>• Cost is 4/5 x higher / Brazil</li> <li>• Salary + Benefits - add 0,5 salary</li> <li>• Work Legislation - liberal</li> <li>• Plant operators: Hourly payment</li> <li>• Management: Monthly payment</li> </ul>
Customer experience	<ul style="list-style-type: none"> <li>• First price and after service pack</li> <li>• Low fidelity</li> </ul>	<ul style="list-style-type: none"> <li>• First service pack</li> <li>• More fidelity</li> </ul>
Product development	<ul style="list-style-type: none"> <li>• Market push converter</li> </ul>	<ul style="list-style-type: none"> <li>• Market push converter</li> </ul>
Commercialization process	<ul style="list-style-type: none"> <li>• Direct to customer</li> <li>• Stretch Film – Direct / Dist. small customers</li> <li>• Shrink Film - Direct</li> <li>• Specialties Film - Direct</li> </ul>	<ul style="list-style-type: none"> <li>• Direct to customer &amp; Distributor</li> <li>• Stretch Film – Distributor</li> <li>• Shrink Film – Direct &amp; Distributor</li> <li>• Specialties Film – Direct</li> </ul>
Credit (financial risk)	<ul style="list-style-type: none"> <li>• Granted by the converter</li> </ul>	<ul style="list-style-type: none"> <li>• Credit Insurance (Euler &amp; Coface)</li> </ul>
Payment	<ul style="list-style-type: none"> <li>• 30 to 90 days</li> </ul>	<ul style="list-style-type: none"> <li>• 30 to 60 days</li> </ul>



# SIMILARITIES AND DIFFERENCES



	BRAZIL	USA
Taxes	<ul style="list-style-type: none"> <li>• Complex</li> <li>• Competitiveness =&gt; Fiscal incentives &amp; Market</li> </ul>	<ul style="list-style-type: none"> <li>• Simple</li> <li>• Competitiveness =&gt; Market</li> </ul>
Banking	<ul style="list-style-type: none"> <li>• More agile and highly digitalized</li> </ul>	<ul style="list-style-type: none"> <li>• Less agile and less digitalized</li> </ul>
Logistics	<ul style="list-style-type: none"> <li>• Documentation: Complex &amp; bureaucratic</li> <li>• Less expensive</li> <li>• Finished Goods – Trucks</li> <li>• Resins &amp; Additives – Trucks - 24,75 ton - 18 Pallets (1,375 ton) – 55 bags/pallet</li> </ul>	<ul style="list-style-type: none"> <li>• Documentation: Simple</li> <li>• More expensive</li> <li>• Finished Goods – Trucks</li> <li>• Resins – Bulk – Railcar &amp; Box (Additives)</li> </ul>
Storage of raw material	<ul style="list-style-type: none"> <li>• Heavy duty bags - 25 kg/bag =&gt; Horizontal</li> </ul>	<ul style="list-style-type: none"> <li>• Silos =&gt; Vertical</li> </ul>
Storage of finished goods	<ul style="list-style-type: none"> <li>• 30 days</li> </ul>	<ul style="list-style-type: none"> <li>• 30 days</li> </ul>
Importation goods	<ul style="list-style-type: none"> <li>• Complex process and high taxation</li> </ul>	<ul style="list-style-type: none"> <li>• Easy process</li> </ul>



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Marketing Valfilm

