



ASSOCIATION OF PORTUGUESE COMPANIES FOR THE ENVIRONMENT SECTOR

AEPSA'S GOAL

- Representation and defense of the collective interests of Portuguese private companies operating in the environment sector, in the areas of:
 - **Water supply;**
 - **Wastewater;**
 - **Waste – Municipal Solid Waste (MSW), Industrial Waste and Hazardous Waste;**
 - **Equipment, Technologies and Projects;**
 - **Use and production of energy;**
 - **Materials and reusable/recyclable products, among others;**
 - **Recovery of products to be reused or recycled;**
 - **Processing and preparation of ferrous and non-ferrous metals, paper and cardboard, ELV (End of Life Vehicles), and all additional similar and related materials amenable to treatment.**

AEPSA 20 Years

AEPSA REPRESENTS TODAY

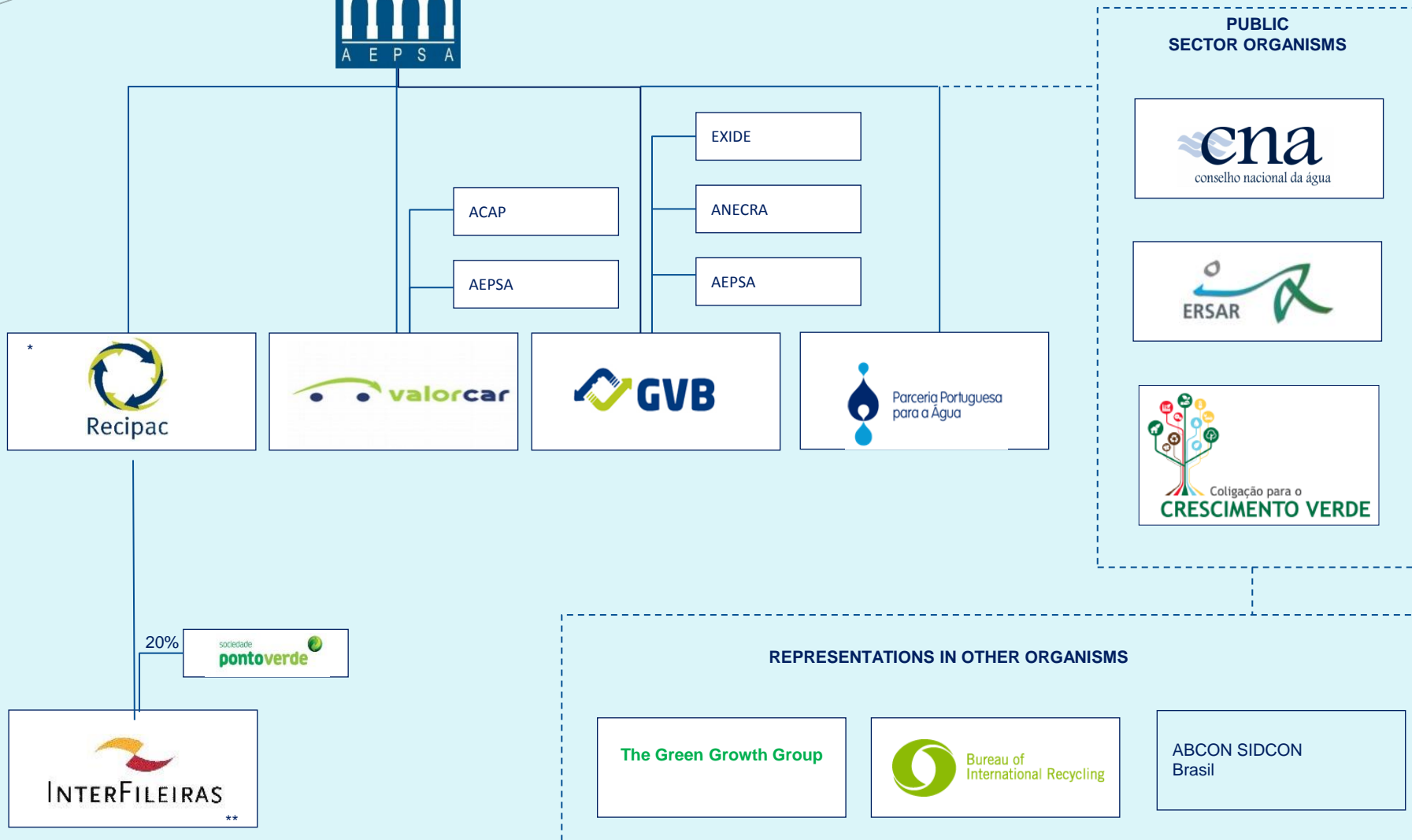
- **Entire Environment value chain in Portugal;**
- **Annual turnover of about EUR 1.5 billion;**
- **57 associates spread over 7 Sectorial Colleges;**
- **13,000 workers**

AEPSA 20 Years

A. S. SIMÕES, LDA
AGS - ADM. E GESTÃO, S.A.
AMBICARE INDUSTRIAL, S.A.
AMBIGROUP, SGPS, S.A.
AQUAPOR, S.A.
AQUAELVAS, S.A.
AUTOCAVÉM, LDA.
AVE, S.A.
BATISTAS, S.A.
BRANCO & BRANCO, S.A.
BE WATER, S.A.
CAVCAVÉM, LDA.
CENTRO DE RECICLAGEM DE PALMELA, S.A.
CESPA PORTUGAL, S.A.
CITRI, S.A.
CLSER, LDA.
CME ÁGUAS, S.A.
COBA, S.A.
DEGRÉMONT, S.A.

ECOAMBIENTE, S.A.
ECOCICLO, S.A.
ECODEAL, S.A.
ECOMETAIS, S.A.
ECOSERVIÇOS, LDA.
EFACEC AMBIENTE, S.A.
EGEO, S.A.
ENGIDRO, LDA
EUROPA&C RECICLA, PORTUGAL, S.A.
FOCSA, S.A.
FRANCISCO MARQUES RODRIGUES, S.A.
GONÇALO & SIMÃO, LDA.
HERDEIROS DE ARMANDO JESUS ANTUNES
HIDURBE, S.A.
INATRUCKS, LDA.
INDÁQUA, S.A.
JOÃO DELGADO MARQUES, LDA.
LEILOESTE
LENA AMBIENTE, S.A.

LYRSA RECICLAGENS INDUSTRIAIS, UNIP. LDA.
MEGAPEÇAS
NOITES, LDA
RECIDIAS, LDA
RECIPRÉMIO UNIPESSOAL, LDA.
RECOLTE, S.A.
RSA, S.A.
SAVAUTO, LDA
SISÁQUA, S.A.
SISAV, S.A.
SITEL, LDA.
SPHERAA, LDA
SUMA, S.A.
SVP AUTO, LDA
TEIXEIRA DUARTE, S.A.
TRANSUCATAS, S.A.
TRIUI, SA
XYLEM, UNIP., LDA



* RECIPAC is an Association of 5 Associations: AFCAL (Association of Manufacturers of Packaging Card for Liquid Food); ANIPC; (National Association of Manufacturers of Paper and Board) APIGRAF (Portuguese Association of the Graphic Arts of Visual Communication and paper and cardboard Transformers); CELPA (Paper Industry Association); AEPSA

** INTERFILEIRAS is an Association of 5 Associations: RECIPAC (paper/cardboard); PI ASTVAI (plastics); FMBAR (wood); FIMFT (metal); CFRV (glass)

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AEPSA 20 Years

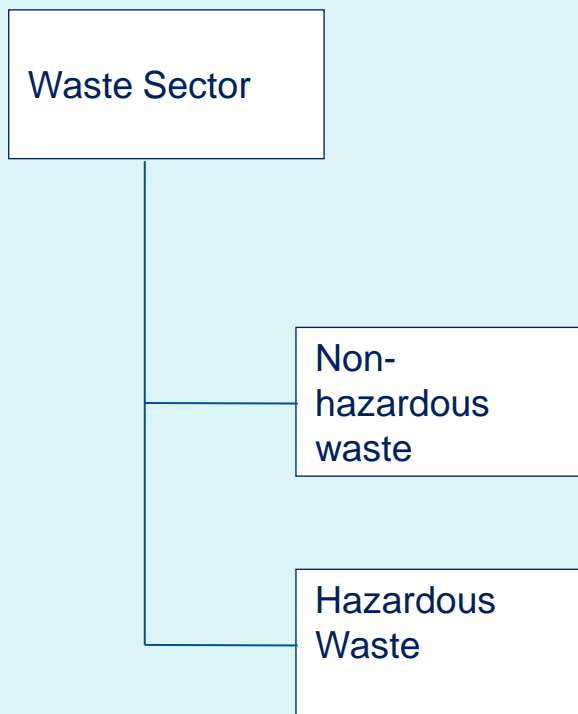
SECTORIAL COLLEGES

- CONCESSIONS
- ENVIRONMENTAL SERVICES
- TECHNOLOGICAL SERVICES
- WASTE
- METALS
- SPECIFIC WASTE FLOWS
- END OF LIFE VEHICLES (ELV)

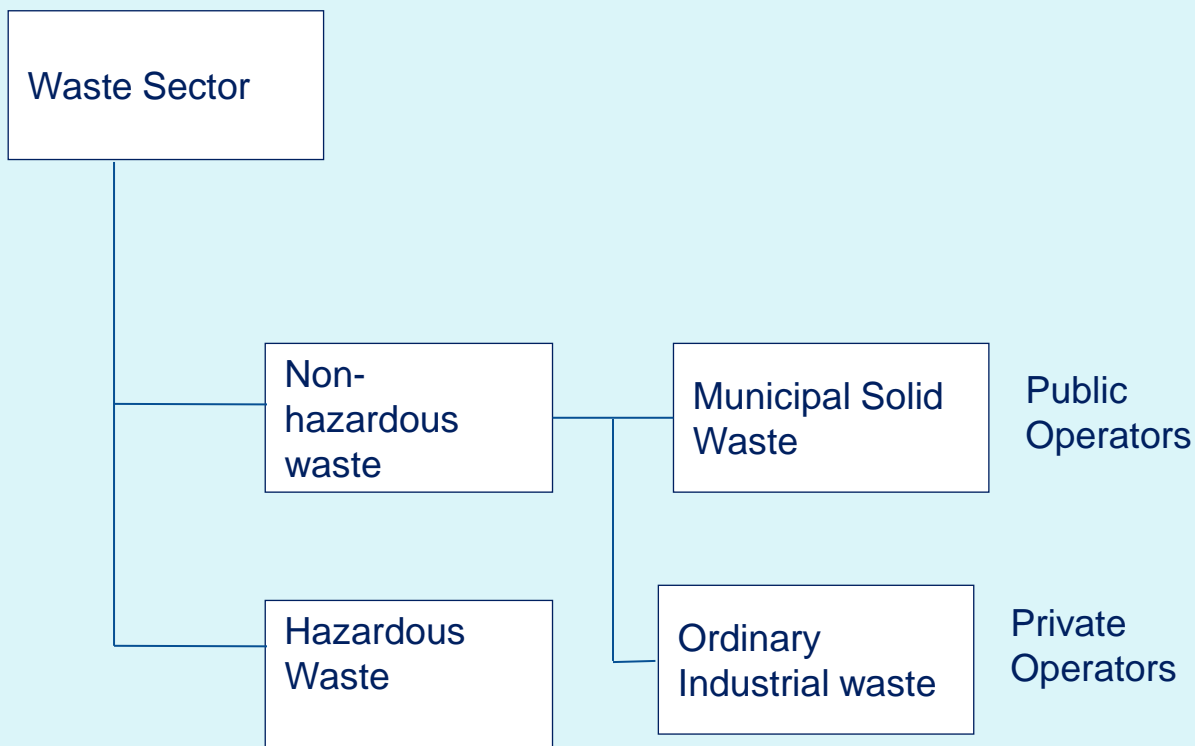
Water and Waste Water – AEPSA Vision

- In Portugal, today the environmental market is characterized as a mature, consolidated and organized market, where 95% of the population is served with a good water quality
- Regarding to water supply and wastewater treatment market, the Portuguese private companies are operating for over more than 15 years.
- It's in its final phase, the Strategic National Plan for Water Services 2014-2020. Thus the main goal of the Portuguese companies is to fulfill the objectives and guidelines set out therein
- Therefore in these sectors, the main concerns will be focused on enhancing efficiencies, reducing losses along the networks and increase the range and quality of services to populations served
- Is also eagerly awaited, the clarification of the private companies role in the water sector

Structure of the Waste Sector - EU



Structure of the waste Sector - Portugal



Waste – Portuguese Situation

- The European Union divides the waste into two main categories: **Hazardous Waste** and **Non-Hazardous Waste**.
- Portugal in order to attract private investors to the sector added a subcategory of waste dividing the Non-Hazardous Waste in **Municipal Solid Waste** and **Ordinary Industrial Waste**
- The definition of municipal solid waste has undergone several changes ,the most important of which was the inclusion of waste from industrial sources with the designation of **Comparable to Municipal Solid Waste**
- This possibility - reception of Industrial Waste by Urban Systems - takes out a significant amount of 570 Ktons to the Private sector
- 2014 is a high expectations year: the review of the Strategic Plan for the Urban Waste - PERSU 2020, that will incorporate the ambitious EU targets and Programme of Action for the Environment of the EU 2014 – 2020, is in the final phase of public discussion
- It is also in progress the privatization process of EGF - General Development Company, a public company which owns the majority shareholding (51 % or higher) of the social capital of 12 of the 23 existing Intermunicipal Systems in Portugal, which are responsible for processing and disposal of municipal solid waste produced by 63 % of the population