



Market Analytics: Polyolefins - 2018

Market Analytics: Polyolefins - 2018 is one in a series of reports published as part of Nexant's **Markets & Profitability** program.

Market Analytics: Polyolefins - 2018 report provides an in-depth analysis of the polyolefins industry including:

- High Density Polyethylene (HDPE)
- Low Density Polyethylene (LDPE)
- Linear Low Density Polyethylene (LLDPE)
- Polypropylene

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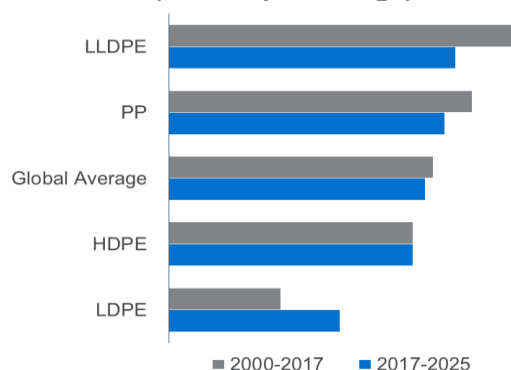
Along with the written report, Nexant's Online Database includes supply, demand and trade analysis for 40 countries and global capacity listings updated on a monthly basis.

Report Abstract:

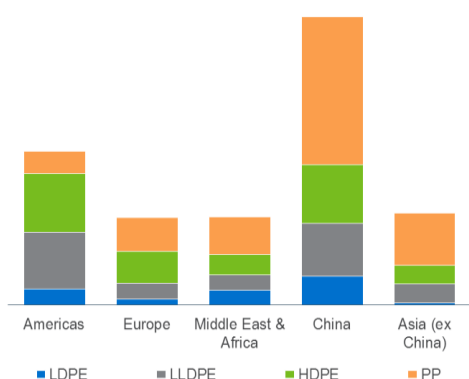
Polyolefins consumption growth remained robust in 2017. Consumption growth and prevailing high integrated olefin/polyolefin margins over the past few years have driven a broad range of capacity development strategies. While polyolefins themselves are the key to monetizing the downstream demand growth, margins remain highest upstream, and polyolefins investment remains primarily feedstock-led. Margins have remained very high across the capacity base in recent years, allowing investment in new capacity globally, and using almost all available upstream options, not just developments around stranded or otherwise advantaged NGLs.

Almost all regions have showed consistently strong consumption growth in recent years. Increased demand for food and other retail packaging remains the key consumption driver worldwide. Growth continues in developed regions despite polyolefins consumption levels passing 60 kg per capita in countries such as the United States. Urbanisation, increasing population and income in developing regions are however the major long term consumption drivers for polyolefins, all driving increased purchasing of the very wide range of products that contain polyolefins. The populous areas of Asia currently drive much of global polyolefin consumption growth, and Africa holds great potential in the longer term.

Global Polyolefins Demand Growth (volume percentage)



Global Polyolefin Capacity Addition 2017-2022



The heavy media coverage and increasing public concern regarding plastic pollution will require an adequate response from producers if the growth relationship to GDP is to be maintained. Packaging in particular has been identified as the largest contributor to marine pollution. The problem has developed as a result of the growth in packaging use in outpacing the capacity of municipal waste collection, leading to large volumes of plastic waste being discharged into rivers, and thus to the sea. A lack of cultural awareness regarding littering in many regions is another significant factor. Recycling and controls on single-use packaging are viewed as attractive solutions by some governments, although "circular-economy" type initiatives to re-use waste polymers for packaging are often highly problematic, uneconomical and indeed questionable from an environmental perspective. The requirements of polymer

performance for food packaging are extremely rigorous, and this kind of recycling therefore involves substantial volume losses and consumption of energy and chemicals in the cleaning process.

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- A. Methodology
- B. The Polyolefins Industry– Technology

This analysis will identify the issues shaping the industry, as well as provide an independent appraisal of the market.

Chapters 3 to 5 are segmented by key region:

- North America
- South America
- Western Europe
- Central Europe
- Eastern Europe
- Middle East
- Africa
- Asia Pacific

Each region/country is further segmented by:

- **Consumption:** Assesses historic and forecast consumption; forecasts are based on projections of end use and economic activity.
- **Supply:** Includes a list of all producers, their production capacity, location, etc., and discussion of the status of new projects.
- **Supply, Demand and Trade:** Provides historical analysis and forecasts to 2035 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilization.

Subscription Details:

Subscription to **Market Analytics: Polyolefins - 2018** includes:

- 12 month access via the Nexant website, to:
 - Unlimited downloads of PDF reports
 - Downloadable data in Excel from the Online Database
- Webinar
- Consultation time with the project team

Customized subscriptions are also available.

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Nexant Subscriptions and reports provide clients with comprehensive analytics, forecasts and insights for the chemicals, polymers, energy and cleantech industries. Using a combination of business and technical expertise, with deep and broad understanding of markets, technologies and economics, Nexant provides solutions that our clients have relied upon for over 50 years.

The **Markets and Profitability** program comprises of the well-known Petroleum and Petrochemical Economics (PPE), PolyOlefins Planning Service (POPS), Strategic Business Analysis (SBA) and World Gas Analytics (WGAS).

Markets and Profitability tracks over 60 feedstocks, petrochemicals, polymers, chemical intermediates and fertilizers on an ongoing basis and provides regularly updated reports covering all commercial aspects of these global industries. The accompanying database, provides global analysis and forecasts in two major inter- related areas: **Markets and Profitability**.

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