



Market Analytics: Polyolefins - 2022

Market Analytics: Polyolefins – December 2022 is one in a series of reports published as part of NexantECA's Markets & Profitability program.

Market Analytics: Polyolefins – December 2022 report provides an update to the forecast and underlying assumptions for the following products :

- Polypropylene
- LLDPE
- LDPE
- HDPE

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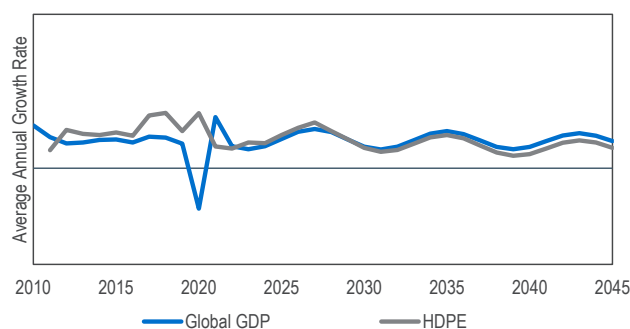
Along with the written report, NexantECA's Online Database includes supply, demand and trade analysis for 40 countries and global capacity listings updated on a monthly basis.

Report Abstract:

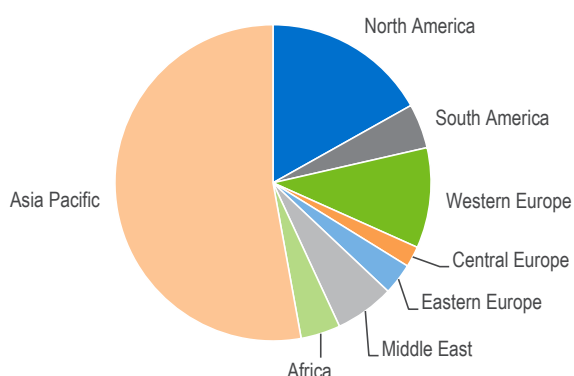
The polyolefins industry is strongly affected by the economy, although the effect on different sectors is varied. For example, in periods of economic crisis, non-discretionary areas of spending that include sectors such as food and beverage, home and personal care, and healthcare, are less affected. Other sectors, such as housing and automotive, are affected more severely.

The main business development that affects the polyolefins industry, including LLDPE, is the increased production of low-cost shale gas in the United States, which has made the United States more competitive and spurred a series of new cracker complexes to be built, with even more proposed. Many of the announced derivative plants associated with these crackers will be LLDPE plants. When these plants are brought on-stream, they represent the most significant addition of capacity outside of the Middle East and Asia Pacific regions in more than 10 years.

Global HDPE Consumption Growth
million tons



Global HDPE Demand, 2022



Over the next decade, feedstock issues will continue to influence the shape and direction of the polypropylene business. With polypropylene growing slightly faster than polyethylene, demand for propylene is rising ahead of that for ethylene, yet since much of the propylene supply is linked to ethylene production in steam crackers, propylene supply is not expected to keep pace with polypropylene growth, especially as more lighter feedstocks that produce less propylene are used in some regions of the world. The location of future polypropylene plants is likely to be influenced as much by feedstock availability as market demand for the product.



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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 2045 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilization.

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

For related analysis, please refer to:

[Market Analytics: Polyolefins 2022](#)
[Profitability and Price Forecasts: Polyolefins](#)
[Quarterly Business Analysis](#)

Subscription Details:

Subscription to **Market Analytics: Polyolefins – December 2022** includes:

- 12 month access via the NexantECA 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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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**.

NexantECA serves its clients from over 10 offices located throughout the Americas, Europe, the Middle East, Africa and Asia.

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