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2011 Program (March 2011 - February 2012)

Prospectus

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PolyOlefins Planning Service 2011 Program (March 2011 – February 2012)

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SECTION 1.



Introduction to the Program

The Program

The ChemSystems PolyOlefins Planning Service (POPS) Program has provided the most detailed, accurate and insightful analysis, of the global polyethylene and polypropylene business since its first publication in the 1990s.

The service is regarded by many in the industry as the definitive analysis and forecast program for polyolefins. By means of an annual Executive Report, Quarterly Business Update reports, three special topic reports per year, plus a tri-annual Technology analysis, the program delivers a comprehensive commercial analysis of the industry.

The analysis in the program is developed by Nexant's polyolefins consultants based on detailed research and field work for all global regions. The forecasts are developed using Nexant's ChemSystems Simulator, the state-of-the-art simulation model of the global petrochemical industry, ensuring that the forecasts are compatible with and integrated to forecasts of olefins and of competing commodity plastics. Subscriptions to Nexant's ChemSystems Simulator are also available, allowing subscribers to develop private scenarios and forecasts.

Key Industry Issues

Despite a major recovery in 2010, there are still turbulent times ahead for the global polyolefins industry as it continues to grapple with the residual effects of the economic crisis of 2008 and 2009. Concerns remain over the fragile state of the economic recovery in the United States and Western Europe with the withdrawal of government-backed subsidies and the housing and automobile industries (a major end-use market for polyolefins) continuing to struggle in many countries. Western Europe has seen economies in Greece, Ireland, and Portugal requiring significant external support and other countries in the region, such as the U.K., are making major reductions in public expenditure in order to reduce government debt levels.

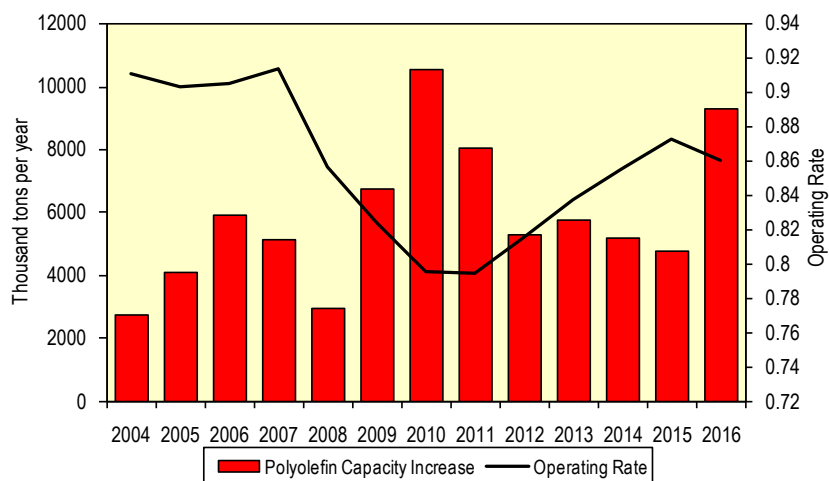
Meanwhile, the Chinese economy, although impacted by the falling demand in some key export markets, has continued to show good growth and helped provide some positive news for the global polyolefin demand picture.

However, the current political instability in North Africa and the Middle East is now placing further pressure on polyolefin markets as crude oil prices soar, driving up feedstock costs for many producers.

The economic outlook for 2011 is to consolidate on the recovery seen in the world's economies in 2010. In real GDP growth terms, global growth was 4.1 percent in 2010, driven largely by strong recovery in North America and Japan and continued strong growth in China. The latest outlook is for a global real GDP growth of 3.6 percent in 2011 although the extent of the economic recovery remains fragile, with fears remaining in some quarters of a return to recession.

In addition to the demand picture, 2011 is set to deliver further significant capacity addition. Much of this is located in China and the Middle East and represents a significant competitive threat to the existing industry. Thus, the investment cycle, as often witnessed for the petrochemical industry, is likely to continue to deliver very strong supply availability in 2011. The current outlook is for improved operating rates from 2012, with industry profitability expected to follow accordingly (see Figure 1).

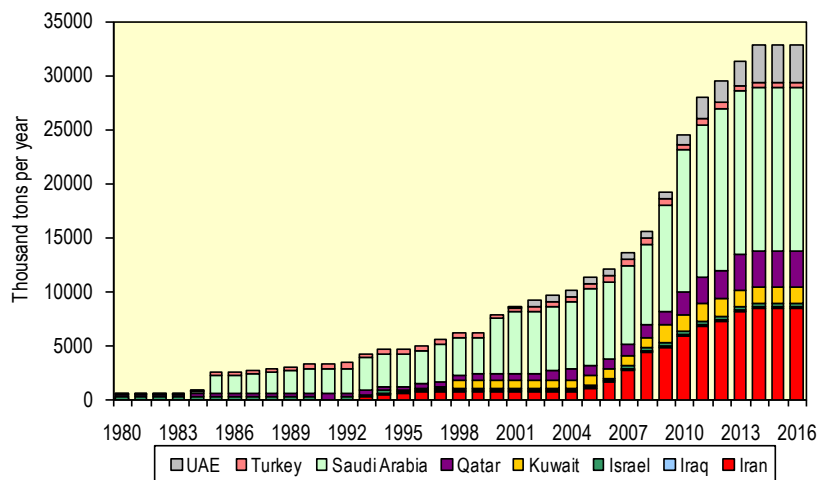
Figure 1 The Next Cycle



Below we outline several important issues for the polyolefins industry.

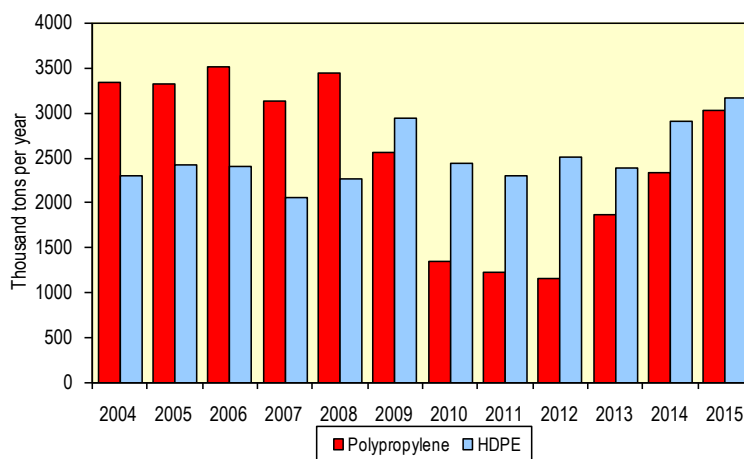
- The economic recession in many parts of the world has caused significant reduction in polyolefin demand in some countries. How quickly will demand recover and when will consumption be restored to at least historic consumption levels?
- In the medium term, operating rates are set to improve. In this context, and against a background of a relatively fragile world economy, what timing can be anticipated for the next cycle and for industry margins and profitability to reach “top-of-cycle” levels?
- Middle East capacity development: What does the future hold? The Middle East is the main investment focus for many companies. While some projects have been delayed for a variety of reasons, the level of Middle Eastern ethylene capacity addition has been immense. Moreover, the number of countries building new plants is also increasing (Figure 2).

Figure 2 Steam Cracker Capacity Growth in the Middle East



- China: Demand growth for polyolefins has been very strong in recent years. The question remains as to what demand growth will look like in the coming years. There is also a strong increase in polyolefins capacity. A key issue is whether this additional capacity will lead to a declining import requirement or whether strong Chinese domestic demand growth will maintain imports at high levels. Our POPS reports will have the latest supply, demand and trade analysis.

Figure 3 Chinese Imports of Selected Polyolefins



- Other regional issues include:
 - Future of the United States: With Shale Gas projects projected to make a major impact on the availability of relatively low cost ethane in the U.S, and many firms announcing studies on constructing new ethylene capacity, what is the outlook then for United States supply, demand and trade position for polyolefins?
 - Role and position of India: With its strong GDP growth, domestic demand has been increasing sharply. In response, domestic companies have announced the development of new capacity, both existing and new producers. With tariffs coming down, will India become a good export opportunity or will the new capacity be sufficient to meet domestic demand growth or even allow for some exports?
 - Future of Western Europe: With imports of finished goods and commodity polyolefin grades on the increase, the challenges facing West European producers remain difficult ones. What is the outlook then for West European producers and how will the combination of demand and supply issues impact on industry operating rates?
 - The outlook for Eastern Europe: This region has the benefit of extensive petrochemical feedstocks. With growing demand, the report will look at a view of capacity development in the region and the result on trade flows.
- Technology development: Most of the focus has been in the single site/metallocene area but there are other developments that will impact the business. The Executive report will provide a detailed outlook for single site/metallocene products, developed for all regions to determine the global demand outlook for these products.

SECTION 2.



Value of the Program

The POPS program is used by, amongst others, Business Managers, Corporate and Business Planners, Industry Analysts, and Investors to understand the dynamics of this global business so that they may improve business performance and shareholder returns.

Our 2011 POPS Program:

We update our commercial database annually. This is based on fieldwork, published statistics and other publicly available information. The fieldwork is conducted in each region and consists of discussions with a variety of industry participants, including polyolefin resin producers, fabricators, end users, trading companies, compounders, and trade associations. These contacts will be in commercial, technical, R&D and various other roles in order to get a detailed and concise set of data and understanding of the key issues.

Polyolefins Producers

Most of the global and regional polyolefins producers subscribe to the POPS program, relying on it to provide detailed market analysts and forecasting. In the complex world of polymer substitution, a reliable source of market forecasts is valuable and provides competitive advantage.

Polyolefin Consumers

Processors and component manufacturers need a sound understanding of their suppliers and the polyolefin industry. POPS provides the global benchmark for supply and market development.

Financial

The financial community has a need to understand polymer markets both through its role in project financing of polyolefin projects and in trading of polyolefin company bonds.

SECTION 3.



Scope of the Program

The POPS program provides analysis of the technical and commercial polyethylene and polypropylene industries. The three polyethylenes: low density polyethylene (LDPE), linear low density polyethylene (LLDPE), and high density polyethylene (HDPE), and polypropylene (PP) are analysed with consumption for both conventional and metallocene grades. Production of LLDPE with co-monomers of butene, hexene and octene are presented. Consumption of polypropylene for homopolymer, random copolymer, impact copolymer and metallocene grades are presented.

Consumption of the four commodity polyolefins is analyzed by segmentation of the markets in each country into first level applications:

- Film - food packaging, non-food packaging, retail bags, trash bags, shrink and film wrap, and others as appropriate to each polyolefin
- Fibre
- Blow moulding - liquid food bottles, non food bottles, industrial drums, gas tanks, and others as appropriate to each polyolefin
- Injection moulding - lids, caps and closures, housewares, tubs & containers, crates/totes, pails, and others as appropriate to each polyolefin
- Extrusion coating - flex packaging and laminates, paper board, and others as appropriate to each polyolefin
- Rotomoulding
- Other extrusion uses - wire & cable, sheet, and others as appropriate to each polyolefin
- Other applications - including adhesives, coatings, and others as appropriate to each polyolefin

Consumption drivers for each country and trading region are discussed. The industry is global and trade from low cost producing regions to regions of high consumption is highly influential on regional balances and prices. Consequently the program analyses the industry in:

- North America
- South America, Central America and the Caribbean
- Western Europe
- Central Europe
- Eastern Europe
- The Middle East
- Africa
- Asia

Developments in the industry are discussed quarterly including consumption, production, pricing and trade, new capacity developments, and company news.

SECTION 4.



Detailed Description of the Program

Our 2011 POPS program has been structured to meet the information and analysis needs of our subscribers and to reflect the changing nature of the industry. All of our reports and databases will be available electronically and in printed form. Subscription to the program is corporate, allowing as many employees access to the data and reports as required. POPS 2011 will provide timely topical data and valuable insights with commercial and technical information to support your company's competitive positioning in the industry. This will consist of the following:

- **An Annual Executive Report** covering commercial aspects of the global polyolefins business (LLDPE, LDPE, HDPE, polypropylene and second generation technology products (metallocene, bimodal, etc.). This will include global, regional and country-by-country supply, demand, net trade, production, and operating rates.
- **Quarterly Business Updates (QBUs)** provide an executive level analysis of key developments in the polyolefins industry. The reports include data reflecting quarterly demand, trade and pricing for selected regions, an updated table of new capacity additions, and a listing and assessment of important industry events (mergers, acquisitions, outages, etc.). Special topics of interest and strategic importance to the polyolefins industry will also be analysed in each QBU (consolidation, restructuring, technology shifts, feedstock issues, etc.). These will be published in the month following the close of each quarter.

Our POPS 2011 program is aimed at providing in-depth coverage plus topical analysis and commentary information. Three **supplements** will be provided covering in-depth analysis of key issues and developments that will likely impact the polyolefins businesses. The three supplements included in our POPS 2011 program are:

- **Supplement I – Linear Alpha Olefins.** Linear Alpha Olefins, especially butene-1, hexene-1, and octene-1, are key raw materials for the production of polyethylene. This Supplement will provide a market review for these products in both mature and developing markets.
- **Supplement II – Olefins and Polyolefins Regional Cost Competitiveness.** This Supplement will provide a detailed analysis of cost of production for olefins and polyolefins in many locations around the world. In addition to previous releases of this study, the effect of ethane from U.S. shale gas, bio-ethylene from sugar cane, and Russian ethane will be studied.
- **Supplement III – China Polypropylene Market.** Consumption of polypropylene in China has risen from 4.9 million tons in 2000 to an estimated 13.6 million tons in 2010, making China arguably the most important polypropylene market in the world. The review will analyse the China polypropylene market in detail, identifying growth drivers and market outlook.

SECTION 4.

Detailed Description of the Program

In addition to the print reports, subscribers are provided with a CD containing the **Global Database**. Our database will include demand, supply (capacity by location and technology), production, net trade, and operating rate for each major country, while regional and global summaries will also be prepared. More specifically, our database will have a detailed demand analysis by processing category (film, injection molding, blow molding, pipe, fiber, etc.). It will also include estimates for both new (speculative) capacity additions by country/region that will be needed and the demand for second generation technology (single site/metallocene and non metallocene) for all of the polyolefins.

Support for the program is provided through our **Presentation/Consulting** service: Companies will be entitled to a half-day presentation of the program results along with a half-day of discussion in smaller groups or workshops. Each presentation will be tailored to the individual company. Travel expenses are not included and will be invoiced at cost.

SECTION 5.



Costs and Subscription

The cost of the 2011 POPS Program is US\$31,000. Amounts are net of all local taxes, duties, and other applicable charges. Companies will be invoiced upon authorization payable within 30 days of receipt of the invoice. POPS 2011 can be ordered using the form provided with this prospectus or online at our web site: www.chemsystems.com.

Technology Report:

Our latest POPS Technology Report will be published in September 2011. This report consists of an in-depth analysis of all key polyolefins technologies employed in the industry. The cost of the POPS Technology Review report is US\$18,000 and is priced separately from the main POPS program.

This Subscription Agreement (this "Agreement") is by and between the undersigned (the "Subscriber") and Nexant, Inc. ("Nexant"). Pursuant to this Agreement, Subscriber will purchase the ChemSystems PolyOlefins Planning Program (POPS) (the "Subscribed Report") for the 2011 subscription year (the "Subscription Year"), produced by Nexant in accordance with the following terms and conditions.

1. Subscribers to the Subscribed Report will receive three (3) copies in published form and access to the Subscribed Report via a password-protected area from www.chemsystems.com. All rights and limitations described above apply equally to hard copy and electronic versions of the reports. Nexant will provide up to eight hours in a single day of consulting services, at cost to be invoiced separately, provided by a senior study manager consisting of a half-day summary presentation of the Subscribed Report and a half-day of individual/small-group focused meetings organized by the Subscriber. Travel expenses are not included and will be invoiced at cost. All amounts invoiced are net of all local taxes, duties, and other applicable charges. Additional published copies of the Subscribed Report are available at US\$1,000.00 (one thousand U.S. dollars) each.
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