

CHEMSYSTEMS POPS PROGRAM



Nexant's ChemSystems PolyOlefins Planning Service (POPS) is a subscription program that provides reports on the polyethylene and polypropylene industry.

POPS is recognized globally as the benchmark source for detailed information and analysis of commercial and technological trends and developments in the polyolefin industry. The program is unique in providing detailed market and technology information to support both licensors' and producers' business planning.

PolyOlefins Planning Service (POPS)

POPS and its Benefits

POPS provides specific analysis on:

Periodic reports that examine existing, developing, and embryonic technologies, with emphasis on:

- Updates of supply, demand, net trade and operating rates for polyolefins.
- Review and analysis of commercially significant developments in technology.
- Regional cost competitiveness of representative polymer plants.
- Recognition of opportunities for new products and innovative processes.
- Realistic, commercially-oriented economic evaluations.

POPS also provides access to special reports on:

- Regional developments.
- Feedstock availability analysis.
- Comonomer trends.
- Speciality applications.

Use POPS to:

- Identify new investment opportunities: POPS pinpoints important recent developments, places these developments in an economic context, and gives fast access to data for consistent analyses of new developments.
- Market planning: Use the detailed consumption breakdown by country to plan production and sales.
- Process research: POPS aids effective research planning by raising awareness of other companies' technology development efforts and the economics of new and existing processes.

POPS 2012 Program

- Executive report: the definitive analysis and forecast of polyolefin supply, demand and trade.
- Quarterly business updates.
- Global database.
- Online data access.
- Supplements:

1. Supplement I – India Polyethylene Market Review. The next fastest growing market after China with PE demand growth projected at between 8-10% in the near term. Its huge population and the availability of educated and skilled manpower at competitive wage-rates coupled with robust economy are the impetus for a long steady growth. On the contrary, inadequate infrastructure and regulatory uncertainty have kept FDI relatively low. Local producers have remained dominant although surging demand for specialty grades, metallocene for example, has seen increased import requirement. How competitive are Indian producers vis-à-vis their Middle Eastern counterparts? The supplement will address this topic and more while also providing traditional information e.g. demand breakdown of each major application.

2. Supplement II – Unconventional Feedstocks & Competitiveness. High naphtha prices that make coal seems a cheap alternative in China. Development of new approaches like dimerization of cheap Middle Eastern ethylene and also shale gas discovery have given producers more feedstock options. The supplement will provide a thorough analysis on production costs, margins and general competitiveness of these unconventional feedstocks vis-à-vis traditional feed slates like naphtha and LPG.

3. Supplement III – Meeting Global PP Demand on the Face of More Light Feed Crackers. Rapid development of gas crackers in the Middle East and switching to shale gas ethane in the U.S. have shorted the market of propylene and other heavier streams normally in abundance from naphtha-fed crackers. Consequently, more on-purpose propylene is required to bridge the shortfalls. China and the U.S. are building new world-scale PDH capacities whilst the former also exploring MTO/MTP from coal as well as extracting more propylene from the refineries. Are these options enough to meet future's demand growth or will PP remain tight in relation to PE?

- Our latest POPS Technology Report was published in December 2011. This report consists of an in-depth analysis of all key polyolefins technologies employed in the industry.

Nexant®, ChemSystems®, and ChemSystems Online® are proprietary trademarks of Nexant, Inc.

Contact: Mazlan Razak, Manager, POPS Program
The Gardens South Tower, Mid Valley City, Lingkaran Syed Putra,
59200 Kuala Lumpur, Malaysia
Tel: +603 2298 7212, **Fax:** +603 2298 7333, **email:** mrazak@nexant.com

www.chemsystems.com

 **Nexant**

CHEMSYSTEMS POPS PROGRAM



Nexant's ChemSystems PolyOlefins Planning Service (POPS) is a subscription program that provides reports on the polyethylene and polypropylene industry.

POPS is recognized globally as the benchmark source for detailed information and analysis of commercial and technological trends and developments in the polyolefin industry. The program is unique in providing detailed market and technology information to support both licensors' and producers' business planning.

PolyOlefins Planning Service (POPS)

POPS and its Benefits

POPS provides specific analysis on:

Periodic reports that examine existing, developing, and embryonic technologies, with emphasis on:

- Updates of supply, demand, net trade and operating rates for polyolefins.
- Review and analysis of commercially significant developments in technology.
- Regional cost competitiveness of representative polymer plants.
- Recognition of opportunities for new products and innovative processes.
- Realistic, commercially-oriented economic evaluations.

POPS also provides access to special reports on:

- Regional developments.
- Feedstock availability analysis.
- Comonomer trends.
- Speciality applications.

Use POPS to:

- Identify new investment opportunities: POPS pinpoints important recent developments, places these developments in an economic context, and gives fast access to data for consistent analyses of new developments.
- Market planning: Use the detailed consumption breakdown by country to plan production and sales.
- Process research: POPS aids effective research planning by raising awareness of other companies' technology development efforts and the economics of new and existing processes.

POPS 2012 Program

- Executive report: the definitive analysis and forecast of polyolefin supply, demand and trade.
- Quarterly business updates.
- Global database.
- Online data access.
- Supplements:

1. Supplement I – India Polyethylene Market Review. The next fastest growing market after China with PE demand growth projected at between 8-10% in the near term. Its huge population and the availability of educated and skilled manpower at competitive wage-rates coupled with robust economy are the impetus for a long steady growth. On the contrary, inadequate infrastructure and regulatory uncertainty have kept FDI relatively low. Local producers have remained dominant although surging demand for specialty grades, metallocene for example, has seen increased import requirement. How competitive are Indian producers vis-à-vis their Middle Eastern counterparts? The supplement will address this topic and more while also providing traditional information e.g. demand breakdown of each major application.

2. Supplement II – Unconventional Feedstocks & Competitiveness. High naphtha prices that make coal, seems a cheap alternative in China. Development of new approaches like dimerization of cheap Middle Eastern ethylene and also shale gas discovery have given producers more feedstock options. The supplement will provide a thorough analysis on production costs, margins and general competitiveness of these unconventional feedstocks vis-à-vis traditional feed slates like naphtha and LPG.

3. Supplement III – Meeting Global PP Demand on the Face of More Light Feed Crackers. Rapid development of gas crackers in the Middle East and switching to shale gas ethane in the U.S. have shorted the market of propylene and other heavier streams normally in abundance from naphtha-fed crackers. Consequently, more on-purpose propylene is required to bridge the shortfalls. China and the U.S. are building new world-scale PDH capacities whilst the former also exploring MTO/MTP from coal as well as extracting more propylene from the refineries. Are these options enough to meet future's demand growth or will PP remain tight in relation to PE?

- Our latest POPS Technology Report was published in December 2011. This report consists of an in-depth analysis of all key polyolefins technologies employed in the industry.

Nexant®, ChemSystems®, and ChemSystems Online® are proprietary trademarks of Nexant, Inc.

Contact: Mazlan Razak, Manager, POPS Program
The Gardens South Tower, Mid Valley City, Lingkaran Syed Putra,
59200 Kuala Lumpur, Malaysia
Tel: +603 2298 7212, **Fax:** +603 2298 7333, **email:** mrazak@nexant.com

www.chemsystems.com

Nexant