



PPE: Polyolefins Market Dynamics

Polyolefins 2014 is one in a series of reports published annually as part of the Petroleum and Petrochemical Economics program.

This report provides an in-depth analysis including:

- Low density polyethylene (LDPE)
- Linear low density polyethylene (LLDPE)
- High density polyethylene (HDPE)
- Polypropylene (PP)

To be published: July 2014

Abstract:

Global polyolefins demand is estimated at 137 million tons in 2013, an increase of 3.8 percent compared to 2012. Global polyolefin demand has largely recovered after the dramatic reduction in 2008 and 2009 occurred.

The demand growth for LDPE is generally the weakest of the polyolefins and has been in decline for a number of years. In 2013 global LDPE demand growth reached 0.8 percent, an improvement from flat growth in the previous year. The degree of penetration of LLDPE into the combined LLDPE/LDPE market has continued to climb every year and in 2005 it reached 50 percent. This has continued to show further progress in 2013 with the degree of penetration reaching 57 percent.

Total polyolefin production increased from 94 to 138 million tons per year from 2003 to 2013. This material was supplied from new polyethylene and polypropylene capacity reaching a total net increase of nearly 56 million tons over this period. 2010 was a very impressive year for net capacity additions, when viewed in comparison with each of the last ten years, amounting to over 11.8 million tons. New projects totalling 3.6 million tons of polyethylene and 2.7 million tons of polypropylene came onstream in 2013, which represents a strong level of new capacity for the industry.

The outlook for 2014 is for a similar amount of polyolefin capacity to come onstream compared to 2013, estimated at 6.1 million tons of polyolefins.

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Each product chapter is segmented by key region and further segmented into three principle areas:

- Consumption: Assesses historic and forecast consumption; forecasts are based on projections of end-use and economic activity in each region.
- 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 2030 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilisation for each region.

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

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