



PPE: Oxo Alcohols Market Dynamics

Oxo Alcohols 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:

- 2-Ethylhexanol (2-EH)
- n-Butanol
- i-Butanol

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Abstract:

Propylene consumption growth accelerated to five percent in 2013. Polypropylene is the largest sector for propylene demand, and accounts for most of the forecast consumption growth. While acrylonitrile and isopropanol have a relatively low growth outlook, acrylic acid and propylene oxide are providing stronger growth. Growth is geographically focused in Asia and the Middle East, with demand in areas such as North America and Western Europe continuing to decline. Propylene demand growth has historically been greater than global GDP but will align closer to GDP levels as the major derivative markets mature.

Polypropylene dominates propylene accounting for two thirds of global propylene demand; whilst oxo alcohols account for approximately 6% of propylene demand globally.

The oxo-alcohols of major commercial importance are n-butanol, iso-butanol and 2-ethylhexanol (2-EH). n-Butanol and 2-ethyl hexanol (2-EH) account for about 80% of global oxo-alcohol demand.

n-Butanol, the largest of the oxo alcohols, grew by 2.0% in 2013 globally. Asia Pacific is the largest market and is also the major importing region. Demand growth will be driven by Asia and the Middle East where most new capacity for n-butanol derivatives is expected. Demand in the Middle East is expected to increase significantly as butyl acrylate, butyl acetate and glycol ether plants are due online over the next five years.

2-Ethylhexanol, another significant oxo alcohol, is largely used to make plasticisers for PVC, mainly diisooctyl phthalate (DOP), which faces regulatory pressure in several developed markets. For example, in Europe, DOP has been banned in specific applications (e.g. children's toys) and is expected to be phased out by 2015.

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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.

Subscription Details:

Customised subscriptions are available by product and/or geography. Geographic segmentation includes:

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

Supply, Demand and Trade data is available for 38 geographic segments in total, including China, United States, Saudi Arabia etc and provided in an accompanying spreadsheet.

Subscription to Oxo Alcohols 2014 includes:

- One hard copy of the report
- Report PDFs
- Excel spreadsheet
- Consultation time with the project team

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