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POPS: Supply and Demand Trends in Western Europe

The PolyOlefins Planning Service (POPS) is a subscription program providing detailed and insightful analysis of the global polyethylene and polypropylene business since the 1990s.

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Supplement Report: Supply and Demand Trends in Western Europe

The Western European polyolefin markets show seasonal consumption trends. The analysis in this report covers the packaging, construction, automotive, agriculture, household, sport and leisure sectors, with each sector a center for polyolefin demand. Generally, during the annual cycle these sectors show peaks in March followed by a relatively strong period up to the annual high peak in July and a strong autumn period in September and October.

The peak in March can be attributed to strengthening demand with improving weather conditions as the winter spell eases, the start of the manufacturing season, the peak month for vehicle manufacture, the start of the agricultural growing season in several countries, strengthening consumer demand and greater feedstock availability. The manufacturing season continues to July, when strengthening demand leads to increase production before a downturn during the cracker maintenance season, Ramadan and the summer low demand period. The autumn provides a boost to downstream production in advance of the Christmas sales period, as the late cracker maintenance season ends, as the end of the manufacturing season approaches and ahead of anticipated poor winter weather conditions.

Western European polyolefin demand is centred in in seven countries - Belgium, Germany, France, Spain, Italy and the UK. The strongest demand centres are located in Belgium and Germany due to the strong availability of polyolefin supply. Packaging, both flexible and rigid, is the largest end use sector accounting for 49 percent of polyolefin demand. The construction sector in Western Europe accounts for over 12 percent of polyolefin demand while household goods accounts for 11 percent and automotive accounts for 7 percent. Demand into other sectors is distributed more evenly among Western European countries.

Polyolefin manufacture is distributed across Western Europe; with two thirds of regional capacity based in four countries, Germany, France, Belgium and Netherlands. Germany has the largest capacity share in Western Europe, accounting for the largest proportion of HDPE and polypropylene production. LDPE production is more widespread in the region, whereas there is a shortage of LLDPE production. The top five polyolefins producers in Western Europe are LyondellBasell, Borealis, INEOS, SABIC and Total Petrochemicals. The region is a net exporter of LDPE and polypropylene, and a net importer of HDPE and LLDPE.

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