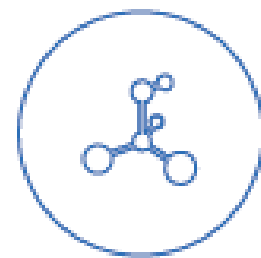


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## PPE: Market Dynamics - Olefins 2016

Market Dynamics Olefins - 2016 is one in a series of reports published annually as part of the Petroleum and Petrochemical Economics (PPE) program.

This report provides an in-depth analysis of the olefins chain including:

- Ethylene
- Propylene
- Butadiene

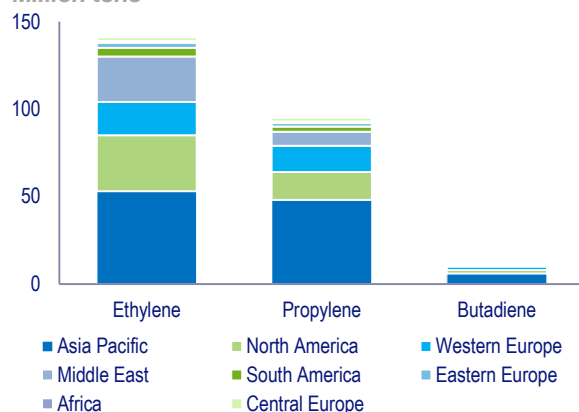
Published: April 2016

### Abstract:

The fall in feedstock prices has distracted attention from the relatively low demand growth in 2015, leaving profitability relatively high, and easing the transition into the period of slower derivative demand growth in China. Aside from the economic and debt related problems affecting derivative demand in China, other recent key performers such as Russia and India also face serious internal economic issues, leaving none of the so-called BRIC (Brazil, Russia, India, China) countries performing strongly. As the decline in crude oil prices is progressively passed through onto derivatives, the major effect on profitability is the sharp fall in margins encountered by gas-based producers in North America and the Middle East.

In comparison to the last ten years, the global capacity expansion profile is becoming broader. China is still the largest single element of capacity growth, although much of the new capacity is now based on methanol rather than conventional steam cracking. After many years in preparation, new crackers are coming to market in India, and other countries such as Indonesia, the Philippines and Vietnam. The United States is effectively replacing the Middle East as the major growth area for low cost, export-oriented ethylene capacity, although there are still a few new crackers coming onstream in the Middle East. Within the Middle East, the focus is shifting to Iran, where several new plants are under construction.

Global Olefins Demand, 2015-e  
Million tons



### Table of Contents:

1. Executive Summary
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- Appendix
- A. Methodology
  - B. The Olefins Industry – Technology

Chapters 3 to 5 are segmented by key geographic region:

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

Each region/country is further segmented by:

- Consumption: Assesses historic and forecast consumption; forecasts are based on projections of end use and economic activity.
- 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 2035 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilization.

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

NexantThinking™ Online Database includes supply, demand and trade analysis for over 40 countries.

New in this report is inclusion of Vietnam in the supply, demand and trade analysis and extension of the forecast period to 2035 (from 2030).

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