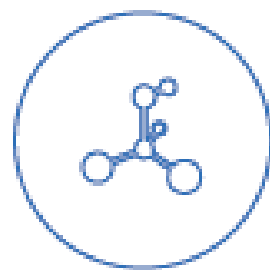


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PPE: Market Dynamics – Polyester & Intermediates 2015

Market Dynamics Polyester & Intermediates - 2015 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 of the polyester chain including:

- Purified Terephthalic Acid (PTA)
- Dimethyl Terephthalate (DMT)
- Ethylene Oxide (EO)
- Mono Ethylene Glycol (MEG)
- PET Melt Phase
- PET Bottle Grade

Note: *para*-Xylene, is covered separately in the **Market Dynamics Aromatics – 2015** report.

Published: December 2015

Abstract:

The global market for PTA, PET resin and fibre remains under pressure from the excess capacity in Asia. The collapse of some of the new entrants into the PTA and PET industries has however allowed some of the new assets to be acquired and thus consolidated by established producers. The EO and MEG markets are increasingly tight due to a lack of new ethylene and EO/MEG capacity development in recent years. The coal-based MEG developments in China have faced severe operational and commercial issues, which have intensified in the lower oil price environment, and continue to limit MEG supply from this source.

The economic slowdown in China created uncertainty over the short term market outlook, as China constitutes around half of the global market for polyester and intermediates. The increase in domestic demand for apparel in China is linked to income growth, and has been a major contributor to the strong performance of the global PET industry in recent years. China's economic slowdown therefore posed a serious risk to the PET market, and the ability of the PET market to grow over 2015 despite the slower economic growth rates in China is a very positive sign for producers.

Global PET Melt Phase Demand, 2015-2020

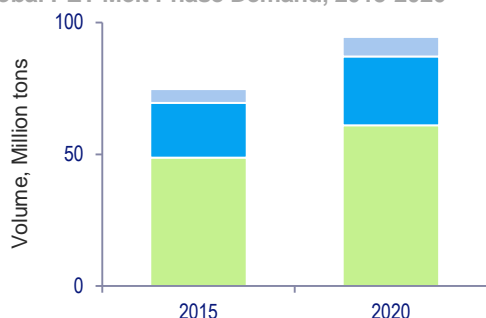


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Chapters 3 to 7 are segmented by key geographic region and further segmented by:

- 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 2030 of consumption, production, imports/exports, inventory build-up/decline, capacity and capacity utilisation.

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

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