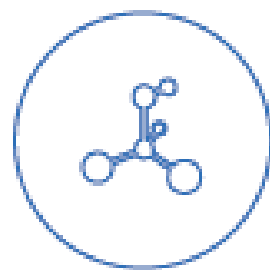


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PPE: Market Dynamics - Polyester & Intermediates 2016

Market Dynamics Polyester & Intermediates - 2016 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 – 2016** report.

Published: December 2016

Abstract:

The PTA and PET markets showed considerable improvement in 2016 as a result of demand growth, restructuring, and a decline in recycling activity in some areas. The MEG market, which was arguably the tightest part of the PET chain in 2015, shifted towards oversupply in 2016 as a result of a surge in production from coal-based plants in China.

The massive PTA capacity developments in China over the last five years plunged the global markets into severe oversupply, and forced most PTA businesses globally into a loss making position. The result has been bankruptcies which resulted in several of the new mega-PTA lines of over one million tons per year taken offline in China, and the permanent closure of many smaller PTA lines around the world. All of the previous major exporters have had volumes decline, or effectively disappear in the case of Taiwan. South Korea has best defended its position, and become by far the largest PTA exporter as Taiwan and Thailand have declined. Its position is under renewed pressure, however as an anti-dumping investigation is underway in the European Union, to which South Korea has come to rely on for around half of its PTA exports. If duties are imposed in 2017, more capacity is expected to close in South Korea.

Global PET Melt Phase Demand, 2016-2020

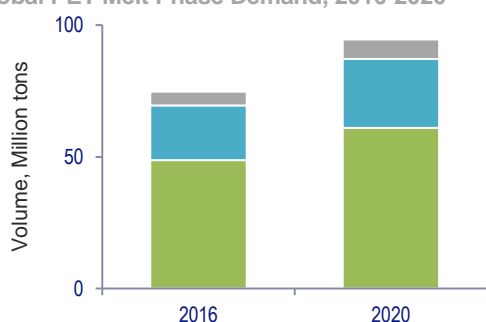


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Chapters 3 to 7 are segmented by key geographic region and further segmented by:

- 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 2035 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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