

PPE: Market Dynamics – Olefins Feedstocks 2017

Market Dynamics Olefins Feedstocks - 2017 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 feedstocks required for:

- Ethylene
 - Butane, Ethane, Ethanol, Gas Oil, Methanol, Naphtha Pentane, and Propane
- Propylene
 - FCC Offgases, Methanol and Propane
- Butadiene

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Abstract:

A variety of feedstocks are used for petrochemicals production. Petrochemical feedstocks are generally produced from the refining of crude oil or the processing of natural gas. Recently, alternative process routes utilising coal, biological hydrocarbons and unconventional natural gas, particularly shale gas, have gained more attention.

Naphtha is expected to remain the dominant feedstock, but crackers are expected to increasingly utilize lighter feedstocks over the forecast period. The fall in oil prices has restored the relative competitiveness of naphtha-based ethylene producers versus mainly gas-based derivative exporters, but it has not motivated a switch back to naphtha, as the prices of NGLs have also fallen, and their availability is increasing as a result of new export capacity in the United States.

Ethylene capacity growth is currently focused in the United States, where several new large and small steam crackers are nearing completion. The majority of the projects are ethane-based and are located in the U.S. Gulf. However, the high cost of transporting ethane to the U.S. Gulf has generated interest in developing new crackers in the gas producing areas themselves. This however brings considerable additional costs, and so far only Shell has confirmed a cracker in the north east of the United States where much of the forecast gas supply growth will occur.

Global Ethylene Capacity, 2016

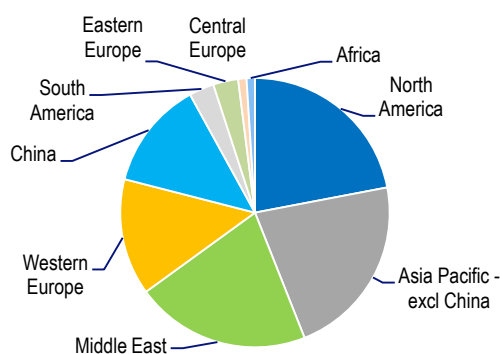


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This analysis will identify the issues shaping the industry, as well as provide an independent appraisal of the market.

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