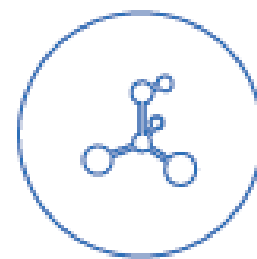


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## PPE: Market Dynamics - Polyolefins 2017

Market Dynamics Polyolefins - 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 polyolefins chain including:

- Polypropylene
- Low density polyethylene
- Linear low density polyethylene
- High density polyethylene

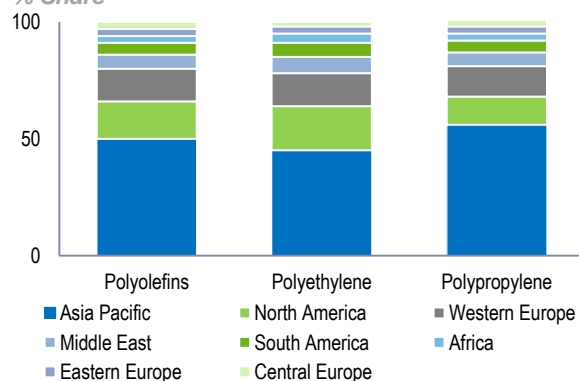
Published: August 2017

### Abstract:

The polyolefins industry is in the process of re-establishing stability on a global scale, although the development of individual regions continues to evolve. China remains the driver for global capacity additions and demand growth, with substantial investment in coal-to-olefins and cracker projects and associated polyolefin derivative plants. China is in the middle of a decade-long wave of investment in new polyolefins capacity, with little sign of easing until 2023. Despite this there are concerns about the sustainability of these plans given the weaker economic projections; however GDP growth is still more than twice that of the United States and Western Europe. Aside from China, demand in most Asian countries is growing rapidly, supporting Asia Pacific as the engine for global growth.

Domestic polyolefin markets in the United States are large and mature with modest levels of growth; however export markets are set for a step change. The availability of inexpensive ethane in the United States has led to the construction of numerous ethane crackers, PDH units, and polyolefins plants, the first major construction in these markets in more than a decade. The first of these integrated complexes is scheduled to come onstream in 2017 and will move the United States to a much stronger net export position. Plans for new capacity developments in South America have thus slowed due to the large capacity build in the United States, as well as continuing economic and political issues in South America.

Regional Polyolefins Demand, 2016-e  
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- A. Methodology
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Chapters 3 to 7 are segmented by key geographic region:

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

This 440 page report discusses each region in detail and 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.

Accompanying the report is an Excel file which provides full global capacity listing and supply, demand and trade balances for the 41 countries currently analysed.

NexantThinking Online Database also includes the capacity and supply, demand and trade analysis for over 41 countries, with capacity updated on a monthly basis.

### Subscription Details:

Subscription to **Polyolefins - 2017** includes:

- One hard copy report
- 12 month access via the NexantThinking website, to:
  - Unlimited downloads of soft copy reports
  - Downloadable data in Excel from the Online Database
- Webinar (*planned in September 2017*)
- Consultation time with the project team

Customized subscriptions are available.

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