Special Reports

Addressing the most topical issues in the chemicals industry
Special Reports – Available Now

North America Propylene Supply Study
Shifting market dynamics are expected to change propylene pipeline distribution, propylene derivative capacity, on-purpose propylene production, and alkylation of refinery grade propylene. This report:
• Designates eleven propylene trade areas (PTAs) in North America; for each PTA provides capacities, supply, demand, and detailed inter-PTA trade flow separately for polymer, chemical, and refinery-grade material
• Discusses strategic issues, such as pipeline scenarios and the impact of new propane dehydrogenation units
• Provides producer profiles, a price overview, and 16 economic snapshots for production technologies

Propane Dehydrogenation in China – Disruption on the Horizon?
Planned propane dehydrogenation units in China may disrupt the global supply and demand balance for propane, propylene and propylene derivatives. This report:
• Assesses the feasibility for each PDH project with site visits and interviews by local IHS experts and plant production economics
• Describes global and China LPG and propane (virtually 100% imported) supply and price outlook, discussing challenges for propane dehydrogenation (PDH) and the implications for PDH derivative markets
• Includes a series of three optional workshops (July-Oct.), PowerPoint materials, and supporting data in Excel format

Chemical Building Blocks from Renewables
Corporate demand for sustainable products and more robust supply chains is fueling the growth of bio-based chemicals. Several renewable chemicals are now in commercial production; more are in the pipeline. This report:
• Evaluates ~30 emerging and established bio-based chemicals, analyzing markets by region and end use
• Describes key developers and their process technologies
• Assesses market drivers, trends, and significant developments such as plant-based PET for plastic bottles

Ammonia Value Chain
As a key feedstock for ammonia production, abundant and low cost natural gas in North America impacts the derivative chemical and fertilizer value chains, dramatically altering the competitive global landscape of production costs, regional supply and demand, and trade flows. This report:
• Explains the impact of low-cost North American methane on ammonia and related markets
• Specifically details regional supply and demand and global trade for ammonia and urea
• Describes how shale gas will influence ammonia cost drivers, changing regional competitiveness

Lubricants in Brazil
Brazil’s lubricant market is growing rapidly and faces regulatory challenges. Industry participants must understand market needs to make strategic decisions on expanding production or relying on imports. This report:
• Describes trends and driving forces of the sixth largest global lubricant market
• Analyzes regulatory challenges and technological changes facing industry players
• Provides company profiles and strategies, as well as current and forecast market size

China Coal Chemical Industry Analysis
The rapidly growing coal-to-chemicals industry will impact major value chains in China. This report:
• Describes the China coal market, including reserves, distribution, transportation, and pricing mechanisms
• Focuses on value chains for methanol, ethylene and propylene, MEG, ethanol, and PVC in China
• Includes the market outlook through 2030, a technology analysis, the economic cost factors, and a producer and project review
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Effect of Shale Based Feedstocks on the Global Petrochemical Industry

Industry players will be able to understand and plan for the global competitive impact of the rapidly growing shale gas based chemical industry. This report:

- Details the regional supply, demand, trade, and pricing dynamics of the following value chains through 2030: methanol, caustic, chlorine, vinyls, ethylene, propylene, and butadiene
- Analyzes (qualitatively and quantitatively) possible scenarios, with key success factors, focusing on the shifting market environment in the Americas, Europe/Middle East, and Asia
- Includes a PowerPoint presentation, Excel data files, and a half-day meeting with content experts

Impact of Tight Oil and Shale Gas on Refining and Petrochemicals

Advances in the development of unconventional oil and gas resources will impact refining operations, fuel blending, and the type and availability of feedstocks for petrochemicals. This report:

- Overviews the global economy and energy outlook, and its implications for North American refining industry and chemical feedstocks
- Focuses on the regional supply, demand, trade and pricing dynamics of naphtha, reformate, pygas, and aromatics (BTX), with a particular emphasis on North America
- Delivers content-rich presentation slides, supplemented by spreadsheet data files

Global Solvents: Opportunities for Greener Solvents

Due to environmental pressure and concerns over toxicity, industry players must understand the growing use of “green” solvents in the context of a comprehensive market analysis of all industrial solvents. This report:

- Details the effect of environmental regulations on the global solvent business
- Covers the producers, end uses, and forecasts through 2017 for key solvents, including oxygenates, hydrocarbons, halogenated solvents, and others
- Profiles nine major producers and describes the dynamics of the major end use markets

Special Reports - Upcoming 2014 Release

Natural Gas Monetization Options: An Economics Comparison August

A comparison of options for profitable use of natural gas by converting it into four value-added chemical products: liquefied natural gas (LNG), gas-to-liquids (GTL) fuels, methanol, and ammonia. This report:

- Analyzes production economics of the four monetization options, using a representative process for each option
- Calculates annual returns on the basis of the difference between the current average product market prices and the production cost of the four products
- Provides two interactive data modules allowing comparison of the four monetization options in nine countries: a model for snapshot economics comparison (Q1 2014) and a model for historical economics comparison (Q1 2000 – Q1 2014)

Methanol into Fuels Applications: New Sources of Growth? October

With traditional methanol end-uses growing at a moderate pace, fuels applications represent a significant upside for methanol demand growth. Methanol is used in a variety of fuel end-uses, such as gasoline blending, MTBE/TAME, biodiesel, DME, and ship bunker fuel. For each of these end uses, this report:

- Assesses the existing demand and growth prospects globally, with a special emphasis on China
- Evaluates the technological advantages and hurdles, compared to methanol alternatives
- Discusses the geopolitical approval and regulatory environment
Special Reports - Upcoming 2014 Release

**Light Naphtha: International Market Review**

October

**Heavy Naphtha: International Market Review**

With the emergence of unconventional oil and gas in North America, growing demand in Asia, and less certain abilities of Europe and the Middle East to supply the balance of naphtha, these two studies are comprehensive guides to international naphtha markets.

These reports:

- Analyze light (paraffinic) naphtha and heavy (reforming) naphtha separately
- Quantify light and heavy naphtha production (from petroleum refining, condensate splitting, and gas processing plants), consumption (to olefins, aromatics, gasoline, crude blending, and other), and trade by country
- Provide a 6-year history and a 15-year forecast of supply, demand, trade, and regional pricing (2009-2029)
- Explain market fundamentals, trends, future risks and opportunities through regional and global narratives

**China Coal Chemical Industry Analysis (Update)**

November

The rapidly growing coal-to-chemicals industry will have a major impact on the conventional chemical industry. There has been significant progress since the original China Coal Chemical Industry Analysis was completed. This report:

- Updates previous study’s project status for the coal to chemicals value chains in methanol, ethylene and propylene, MEG, PVC, and ethanol; adds new projects announced since the previous study was completed
- Includes updated economic analysis for coal to methanol, ethylene and propylene, MEG, and ethanol
- Contains an updated market outlook through 2030

Special Reports – Proposed

**Oilfield Chemicals Supply Chain Analysis**

Understanding supply chains is key in a complex and growing oilfield chemicals industry. This analysis is crucial for companies to find opportunities to leverage their positions and plan supply of critical chemicals. This report:

- Studies six key supply chains for oilfield chemicals in upstream crude oil and natural gas
- Models production and logistics costs to provide an independent view of prices and margins
- May include supply chains such as: synthetic drilling mud, a stimulation surfactant, a stimulation acid, a demulsifier, a viscosifier, an EOR surfactant, and a paraffin inhibitor

Feedback on study scope? Ideas for topics you would like to see covered in a Special Report?

Please contact chemicalspecialreports@ihs.com

For more information

www.ihs.com/chemical

Americas
ChemicalSalesAmericas@ihs.com

APAC
ChemicalSalesAPAC@ihs.com

EMEA
ChemicalSalesEMEA@ihs.com