IHS ENERGY & CHEMICAL

2016 Light and Heavy Naphtha: International Market Analysis

STRATEGIC QUESTIONS:

• How will the emergence of unconventional oil and gas impact global naphtha, NGL and gasoline markets? What are the long-term implications for North America and other regions?

• How will availability of cheap propane impact consumption of naphtha in Europe and Asia and trade between regions?

• Will the Middle East invest in regional or Asian naphtha consumption, and how will that strategy impact naphtha and NGL markets?

• Will Asia consumption of heavy and light naphtha slow-down during over-investments in aromatics, olefins and refining?

Comprehensive global market analysis for light and heavy naphtha, which include long-term supply, demand, trade, and price forecasts

2016 Light and Heavy Naphtha: International Market Analysis, a fully integrated in-depth analysis of global naphtha market enables you to:

• Understand how present and future regional trends and developments may impact your company

• Support your critical business decisions with unbiased insight into market dynamics

• Hone in your market views through discussions with IHS naphtha experts

The Light Naphtha balances include: light naphtha, natural gasoline, full range (“open-spec”) naphtha and also heavy paraffinic naphtha that is not suitable feed for catalytic reforming. The Heavy Naphtha balances include: heavy naphthas with high naphthenic and aromatic content that are suitable feed to reforming.

This service quantifies, analyzes, and explains market fundamentals, trends, future risks and opportunities through regional and global narratives. The study provides supply, demand, trade and regional pricing data for the past 5 years, the base year and an annual 15-year forecast (2010-2030).

Unparalleled Depth and Breadth of Coverage

This service integrates IHS expertise and market intelligence in crude oil refining, condensate splitting, natural gas processing, aromatics, and olefins. The analysis:

• Differentiates light and heavy naphtha supply, demand, and trade
• Aggregates supply of light and heavy naphtha from all different sources
• Reconciles international trade separately for light and heavy naphtha
• Introduces prices of heavy reforming naphtha in Europe and Asia
• Defines price-setting mechanisms through a full price tier analysis
Scope of Work

For Light and Heavy Naphtha, the service provides:

- **Market Analysis** by region, discussing key issues, market fundamentals, and trends
- **Supply/Demand Balance** by country and region (2010–2030)
  - Production from petroleum refining, natural gas processing, and condensate splitting
  - Demand from aromatics (benzene toluene, xylene) and olefins (ethylene, propylene, butadiene)
  - Fuel-driven demand for gasoline and crude oil blending
- Imports and exports by country
- **Price Forecasts** for the US Gulf Coast, Western Europe, and Asia
- **Production Capabilities** and operating rates for light and heavy naphtha, by country
- **Price Tier Economics** by end-use and region with price setting rationale

Deliverables

This service provides online access to full spreadsheet file data sets and a full set of narratives about underlying market fundamentals, developments, and trends. Clients will also receive access to IHS naphtha experts, who can provide additional explanation about market fundamentals and trends discussed in the report.

Nick Rados, Ph.D. – Global Business Director, Chemical Feedstocks

Nick is responsible for IHS business and expertise in the area of chemical feedstocks, including effects of current and anticipated changes in petroleum refining and gas plant operations onto aromatics and olefins chemicals. Nick joined IHS in 2013, with 20 years of experience in the chemical and petroleum refining industries. His experience includes a 10 year tenure with ExxonMobil, working on a variety of refining and petrochemical assignments involving: business strategy, capital investment, operations improvement, competitive intelligence, and technology licensing.

Nick has a Doctorate in Chemical Engineering from Washington University in St. Louis and executive business training from Northwestern University and the University of North Carolina.

Thomas J. Manning – Senior Research Director, Natural Gas Liquids

Tom is responsible for directing long range studies covering crude oil, refined products and natural gas liquids (NGLs), which investigate future trends in the industry. He has also directed a number of single and multi-client studies on supply, demand, pricing, and marketing of petrochemicals, refined products, natural gas liquids, crude oil and natural gas. Tom has been with Purvin & Gertz (now IHS) for 32 years. His prior experience includes 18 years with Pace Consulting and 5 years with Monsanto.

Tom holds a bachelors of science degree in chemical engineering from Louisiana Tech University, and a MBA from the University of Houston.

For more information

www.ihs.com/chemical

ABOUT IHS

IHS (NYSE: IHS) is the leading source of information, insight and analytics in critical areas that shape today’s business landscape. Businesses and governments in more than 150 countries around the globe rely on the comprehensive content, expert independent analysis and flexible delivery methods of IHS to make high-impact decisions and develop strategies with speed and confidence. IHS has been in business since 1959 and became a publicly traded company on the New York Stock Exchange in 2005. Headquartered in Englewood, Colorado, USA, IHS is committed to sustainable, profitable growth and employs about 8,800 people in 32 countries around the world.