



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 in spite of 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 deep IHS expertise in crude refining, condensate splitting, natural gas processing, aromatics, and olefins. The analysis:

- Differentiates light and heavy naphtha in supply, demand, and trade data
- 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 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 provide 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.

Debnil Chowdhury – Director, Natural Gas Liquids Research



Debnil is the primary author of the North American NGLs research service and is responsible for global feedstocks pricing. He has also directed a number of refined product and NGLs, pricing, and market entry strategy studies for clients. He is the primary creator of the IHS proprietary long-term ethane analytics price forecast model, which can be used to provide insight on and quantitatively link ethane supply/demand to long-term pricing. Prior to IHS, he worked at Valero as a Senior Market Analyst, responsible for strategic planning and market analysis support for downstream, renewable, and retail assets globally and at Halliburton-KBR as a Process Engineer in Refining Technology Development.

Debnil holds a BS in Chemical Engineering and Certificate in International Affairs from the Georgia Institute of Technology, MS in Predictive Analytics from Northwestern University, and an Executive Certificate in Management and Leadership from the Massachusetts Institute of Technology's Sloan School of Management.

For more information

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