



IHS CHEMICAL

Addressing Key Topical Issues in the Global Chemical Industry



IHS Chemical Strategic Reports – 2016

C₅ Value Chain Study:

From Cracker to Key C5 Derivatives Applications for Isoprene, DCPD and Piperylene

Under volatile energy conditions, producers need to add maximum value to every stream the cracker produces. The C5 stream provides a link between the cracker and a number of downstream industries. This report:

- Completes IHS Chemical's coverage of the steam cracker envelope with a comprehensive view of the C5 business including supply, demand, production economics, and price
- Provides market dynamics for the major C5 petrochemicals – isoprene, DCPD (according to purity), piperylene concentrate, isoamylenes, pentanes, and, where pertinent for completeness, C9 resin
- Reviews relevant developments in downstream industries that reflect up the C5 petrochemicals value chain

Latin America Polyethylene Market: Supply Shortfalls, the Growing Opportunity

The Latin America polyethylene market is growing rapidly – demand will exceed 8.6 million metric tons by 2020. With only one major capacity addition in sight, imports will significantly increase for the region. This report:

- Provides break-downs of demand by product family (including into co-monomer type where applicable), main country/sub-region, process group, and end-use market
- Describes the competitive landscape of the Latin America Market and its main players
- Lists the top polyethylene consumers by country, including demand data and contact information

China Coal Chemical Industry Analysis (2015 Update)

The rapidly growing coal-to-chemical industry will continue to have a major impact on the conventional chemical industry. There has been significant progress since the original 2012 China Coal Analysis was completed. This report:

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

Chemical Industry Capital Costs: A Global Spending Outlook

The global chemical industry will spend more than \$1 trillion over the next 10 years. New sources of feedstock and a sharp decline in oil prices will affect how much capacity will be added and where it will be built. This report:

- Provides a 15-year history of capital and a 10-year forecast for downstream capital spending by region
- Details spending for EPC services, construction labor, equipment, steel, civils, instrumentation, and electrical
- Analyzes how shifts in feedstocks are affecting key product chains: aromatics, fibers, inorganics, methanol, ammonia, olefins, and plastics

IHS Chemical Strategic Reports – 2016

Global Ethylene Logistics Review: Ready to be Waterborne?

A comprehensive view of global ethylene logistics and the associated economics, this report will help companies understand the options available for moving the monomer. This report:

- Details all ships, pipelines, terminals, and ports currently available worldwide for ethylene movement
- Identifies potential markets for ethylene exports
- Calculates the economics for moving ethylene from the US and the Middle East to export markets

US Bulk Chemical Industry Trade & Logistics in the Shale Gas Era

With 100 million metric tons of petrochemical capacity additions by 2025, there will be significant uptick in chemical trade activity and logistics considerations to move the increased production to consumers. This report:

- Explains the drivers for development and trade patterns within the bulk chemical value chain including plastics, chlor-vinyls, methanol, ammonia, benzene, and alpha-olefins in the US
- Identifies potential opportunities relative to the shale gas for producers, end users, investors, and transportation & logistics companies
- Lists the preferred US domestic shipping modalities and likely international import and export ports

Light Linear Alpha Olefin Market Study

A comprehensive examination of the light linear alpha olefins (LAO) market for Butene-1, Hexene-1 and Octene-1 globally and by major regions. This report:

- Covers LAO demand segmentation by application and carbon group
- Discusses the upstream and downstream integration of various competitors, potential impacts of polymer inter-competition in butene-1, hexene-1 and octene-1 grades, and potential impacts of emerging technology
- Evaluates on-purpose capacity requirement for the lower LAO to supplement the volumes provided by full range plants
- Covers typical pricing bases and types of pricing formulas used for Butene-1, Hexene-1 and Octene-1

High Pressure EVA Copolymers: Adding Value to LDPE Assets

A decade ago, no one had predicted that new high pressure LDPE plants would continue to be built globally or that the scale and design of world scale LDPE tubes would make them cost competitive with many existing gas phase LLDPE plants. A number of these new world scale LDPE tubes are also capable of making EVA resins. And even more surprisingly, a number of autoclave expansions and even a few new autoclave LDPE reactors are also being planned. This report:

- Examines the global outlook of high pressure EVA copolymers market
- Covers applications for low, medium, and high EVA resins, their demand, growth forecast, value-in-use and price forecast, and other underlying trends in global and regional markets
- Discusses new capacity additions and the industry response to the capacity imbalance
- Evaluates cost of upgrading LDPE homopolymer capacity to higher value resins and profiles major global producers

IHS Chemical Strategic Reports – 2016

Opportunities for Plastics: Asian Automotive Industry

Plastics for automotive segment are the high growth sector in Asia and offers clear opportunities to producers of a range of polymers. This study examines the consumption of key resins and analyses key driving parameters affecting plastic usage in the automotive market. This report:

- Provides light vehicles production by countries in Asia and by OEMs from 2010 to 2030
- Covers consumption outlook of key resins used in light vehicles
- Examines the impact of crude oil on the price of key resins
- Evaluates the strategy including approval process for new entrants (resin producers) in the OEM market
- Identifies opportunities and challenges for the resin producers in the OEM market

Transformation of Middle East Petrochemical Industry

A comprehensive view of the Middle East petrochemical industry including debottlenecking issues and diversification of Middle East petrochemical industry. This report:

- Examines issues impacting the Middle East petrochemical industry
- Discusses diversification of intermediate industry
- Evaluates future opportunities for asset stretch, integration and supply chain optimization

India Olefins & Polyolefin: Converter Mapping Study

The supply shortfall of polyethylene and polypropylene in India is affecting trade patterns for specific resin types. This report:

- Examines the issues impacting market participants both inside and outside of the country
- Provides break-down of demand by product family (including into co-monomer type where applicable) and end-use market
- Describes the landscape of the Indian Subcontinent market and its main players
- Lists the top converters and their size

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

Please contact chemicalstrategicreports@ihs.com

For more information

www.ihs.com/chemicalstrategicreports

Americas
ChemicalSalesAmericas@ihs.com

APAC
ChemicalSalesAPAC@ihs.com

EMEA
ChemicalSalesEMEA@ihs.com