

Algeria Petrochemicals Report Q4 2016

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Abstracts

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Algeria's petrochemicals sector will remain dominated by the fertiliser sector, which utilises the country's considerable natural gas resources. Upstream developments will be crucial to providing the necessary feedstock for new capacity, but the outlook on Algerian oil production is heavily bearish, due to rapid decline rates at mature producing fields and the small pipeline of projects under development. The outlook on gas is slightly more positive, although strong domestic consumption growth will continue to weigh on exports.

Algeria has focused on low added-value production, relying on commodity chemicals that are highly pricerresponsive to market fluctuations and easily undermined by capacity elsewhere in the world. The industry is some distance from competing on equal terms with European petrochemicals producers with regard to product diversification. As a result, it will be vulnerable to market fluctuations in the narrow range of products it produces, although the effects on margins should be cushioned by the local availability of competitively priced feedstock.

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