

# Argentina Petrochemicals Report Q1 2014

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## Abstracts

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The Argentine petrochemicals industry will struggle to compete against imports from Brazil and the US as competitiveness declines amid feedstock shortages. While the situation could turn around if domestic gas resources are tapped, this scenario is not expected over the next five years, according to BMI's Argentina Petrochemicals Report.

Renationalisation of YPF has failed to stop the annual winter crisis of gas supply, which has caused feedstock shortages for the petrochemicals industry. Argentina has been a net gas importer since 2008 and has prioritised supplies to the residential power sector over the needs of the petrochemicals industry.

Cutbacks in gas supplies have undermined performance and deterred investment and renationalisation has provided no new feedstock. Moreover, the fall in the value of the peso, which has raised the cost of imports, coupled with a price cap on consumer prices for electricity and natural gas has made natural gas unprofitable. There is the possibility of policy reversal if shale proves to be commercially viable for extraction, as in the US. If so, the Argentine petrochemicals industry could undergo the transformation seen in North America. Nevertheless, it is unlikely to make any impact on capacity over the medium-term with BMI anticipating 2020 as the earliest date for any new cracker construction in Argentina.

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