

Azerbaijan Petrochemicals Report Q3 2016

<https://marketpublishers.com/r/A41FC13108DEN.html>

Date: June 2016

Pages: 63

Price: US\$ 1,295.00 (Single User License)

ID: A41FC13108DEN

Abstracts

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BMI View: Azerbaijan's hopes of establishing a world-class petrochemicals facility by 2020 have been dealt a major blow as the country's economic woes have prompted a freeze on the plans for a new integrated complex, the Oil and Gas Processing and Petrochemical Complex, which was intended to rival major Middle Eastern producers.

Azerbaijan's aim of becoming a significant petrochemicals exporter is unlikely to be realised in the foreseeable future. SOCAR is focusing on petrochemicals investment in Turkey, which remains a major export destination for the country's oil and is a large industrial economy with access to the EU market. Azerbaijan imports 60,000tpa of finished chemicals products that could be substituted with Azerbaijanimade products. In order to meet this target and become a net exporter, it is our view that additional ethylene and propylene plants will need to be constructed.

Azerbaijan will need to address major infrastructural constraints if it is to become a significant petrochemicals producer. Capacity utilisation of existing plants is restricted by lack of investment and maintenance, as well as the predominance of old and environmentally damaging technology. Projects outlined by the economy ministry are formulated based on prospective export markets. However, the industry is highly underdeveloped and there is a gap between petrochemicals ambitions and available feedstock. In the past, output has been undermined by the rising cost of electricity, which state-run chemicals company Azerkimya has been unable to afford, leaving it in need of a government-backed financial lifeline. This demonstrates the lack of efficiency in the petrochemicals industry in Azerbaijan and its dependence on state subsidies.

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