

# Brazil Petrochemicals Report Q1 2016

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## Abstracts

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**BMI View:** The Brazilian petrochemicals industry is faced with heightened risk amid exchange rate volatility and a slumping domestic market, on top of the worsening business environment which is seeing chemicals industry incentives withdraw, taxes hiked and input costs soar. While export growth helped limit the effects of a deteriorating domestic market in 2015, there is uncertainty over whether the sector will have sufficient access to competitively priced feedstock going forward, even as the recession is set to continue into 2016.

The petrochemicals market was affected by recessionary forces in 2015 with a negative performance across the polymer slate. According to the Brazilian Chemical Industry Association (Abiquim), domestic demand for resins fell 4.7% y-o-y in 9M15. Domestic sales fell by 1.5% y-o-y in the period, while imports showed a reduction of 12.9%. On the upside, production grew 3.9% y-o-y as a result of a 39.6% growth in exports.

Exports were boosted by the weakness of the real, which is continuing to slide in value against the US dollar and is set to fall to BRL4.00/USD in the near term.

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