

# China Petrochemicals Report Q3 2016

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## Abstracts

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China continues to be the motor of the global petrochemicals market. However, economic and regulatory pressures will have a bearing on growth in the near to medium term, particularly in relation to stresses in the construction sector, which is one of the main consumers of petrochemicals. While the country will remain the biggest contributor to ethylene demand and supply globally, low oil prices cast doubt on the massive coal-based growth, which no longer makes economic sense.

Chinese petrochemicals output rose in the first four months of 2016 with ethylene output up 12.3% y-o-y to 6.23mn tonnes and primary plastic production rising 9.7% y-o-y to 26mn tonnes. Plastic product volumes grew 7.3% y-o-y to 23mn tonnes. Although petrochemicals output is rising, capacity utilisation for coalbased polyethylene (PE) producers is likely to remain low at 65-70% in 2016, down from over 80% in 2015. Meanwhile, China's polypropylene (PP) operating rate was around 75% by Q216.

The rebalancing of China's economy away from fixed asset investment and towards private consumption will significantly drag on demand growth for construction-related materials. PVC will be particularly affected given its heavy exposure to the construction sector, while slowing automotive output growth will hit engineering plastics, particularly PP, as well as synthetic rubber and polyurethanes.

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