

China Petrochemicals Report Q4 2015

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Abstracts

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BMI View: The Chinese petrochemicals industry will be rocked by the events of August 2015, when the yuan was devalued and the stock market crashed. The sector had already been seeing slower rates of growth as a result of a rapidly cooling national property market and government efforts to secure a soft landing for the economy. However, recent events have exposed underlying weaknesses that touch on issues of industrial over-capacity, high levels of corporate debt and market volatility, but we believe petrochemicals is better placed than other sectors to weather the storm.

Producers are hoping that the yuan's devaluation will boost external competitiveness and support exports. However, external markets are weak while the cost of feedstock - chiefly oil-derived naphtha - will rise in local currency terms. Moreover, they will have to contend with a rise in the cost of their debt if the yuan continues to decline as many have responded to higher domestic interest rates by taking advantage of low interest rates in global markets. A rise in the Fed rate, which had been touted for late 2015, would further undermine long-term finances.

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