

Germany Petrochemicals Report Q3 2016

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Abstracts

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BMI View: Germany's petrochemicals industry has witnessed a decline in the value of sales, but rising output volumes and continued low naphtha costs have helped producers defend margins. The outlook is modestly positive with sales likely to be increasingly oriented towards the domestic market, although there are ongoing concerns over the potential threat of competition from low-cost producers the US and the Middle East. Germany will need to maintain its level of value added with its advantage in technological innovation in order to maintain competitiveness.

In Q116, German chemical output, excluding pharma, rose 1.9% q-o-q but only 0.2% y-o-y, according to the Verband der Chemischen Industrie (VCI, Chemical Industry Association). However, with capacity utilisation at 83.6%, the sector was performing well. Chemical prices declined 1.4% y-o-y and 1.3% q-o-q due to falling feedstock costs. Demand also decreased with domestic sales down 1.2% q-o-q and 4.1% q-o-q and external sales down -0.7% q-o-q and 3.1% y-o-y. There is growing confidence of a strong year among plastic packaging manufacturers as consumer demand strengthens, while the construction sector is also set for rising growth rates. The weak point is the automotive industry, which looks set to be hit by the Volkswagen emissions scandal. This will put downward pressure on demand from the automotive parts producers and undermines the drive to diversify and add value to petrochemical production.

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