

India Petrochemicals Report Q3 2016

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Abstracts

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BMI View: The performance of the Indian petrochemicals industry is set to strengthen in 2016 as new capacity comes onstream, albeit subject to the lengthy delays that have come to characterise the sector's development. The year began positively with the rescue of Haldia Petrochemicals and the completion of the Brahmaputra Gas Cracker and Polymer Ltd, both in the east of India where the government is now focusing its attention to take advantage of growth in neighbouring markets.

In Q116, growth was lacklustre compared to the same period in 2015 and saw a significant downturn compared to the previous quarter. Based on the average industrial production index for the first three months of 2016, chemicals output was up 0.6% y-o-y and 1.8% q-o-q, but rubber and plastic production fell 0.5% y-o-y and 6.8% q-o-q respectively. However, output was approximately in line with overall industrial trends with the industrial index growing 0.2% y-o-y, but falling 6.4% q-o-q.

The agriculture sector accounts for the bulk of polyvinyl chloride (PVC) demand in the country, with 70% of the resin purchased for use in irrigation pipes. The remaining 30% finds use in the construction sector, where PVC is used to make profiles, films, sheets and fittings, and in calendaring applications. The automotive sector will be a major force in driving engineering and high-performance plastics and synthetic rubber in India, and is fuelling the diversification of downstream industries. Producers are seeking to increase the value of production and to raise margins by tapping into growth in the autos industry, particularly in styrene-butadiene rubber, which India does not produce but which is needed for tyre production. The automotive component and tyre sectors are witnessing double-digit growth, fuelling demand for high value materials.

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