

Israel Petrochemicals Report Q3 2016

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Abstracts

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Israeli petrochemicals margins grew strongly in 2015 due to lower naphtha costs, which offset sluggish output and falling product prices. Israel's refinery sector has capitalised on imports of oil from Kurdistan as well as lower global oil prices, which has been fed through the production chain. Producers will be banking on improved demand to boost growth in earnings in 2016.

Naphtha costs will be crucial to defending and growing petrochemicals margins over the medium term. The theoretical surplus between supply and demand in the global oil market will grow over the coming years, precipitating a decline in the price of oil and a corresponding decline in naphtha feedstock costs. For Israel's relatively small, naphtha-fed petrochemicals industry, this will be crucial to ongoing profitability. At issue are the sector's ageing plants, which are under investigation for environmental crimes, with calls for closure due to the effects of operations on residents. The efficiency of the plants brings into question their long-term competitiveness. Plans to expand the Haifa complex's storage facilities by 20%, submitted in January 2016, were dealt a major blow in April 2016 when it emerged that the regional planning and building committee rejected the application on environmental grounds.

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