

Kuwait Petrochemicals Report Q4 2016

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Abstracts

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External markets are under pressure and margins are being squeezed by falling prices and rising feedstock costs. However, this will not stop the development of downstream plants, with the Al-Zour project at the greenfield 615,000 barrels per day (b/d) Al-Zour refinery now going ahead following delays, and with debottlenecking projects helping to expand capacity. However, the alleviation of sanctions on Iran will pose a major threat to all regional producers and could still drive Kuwaiti petrochemicals margins down further. There are also downside effects of a medium-term reduction in oil refinery capacity.

The slowdown in the Chinese petrochemicals market has exacerbated the problem of oversupply in the Asia Pacific region. Moreover, the Chinese market is moving towards a situation of self-sufficiency. This is likely to crowd out Kuwaiti exports from the market, requiring producers to seek other markets. The most obvious alternative market is India, which ideally suits the configuration of the Olefins III project with its higher proportion of propylene derivatives that the Indian industry needs to import.

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