

# Poland Petrochemicals Report Q4 2016

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## Abstracts

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**BMI View:** The Polish petrochemicals industry is facing plenty of downside risk as a result of the potential effects of a Brexit-induced slowdown in manufacturing exports. Already, petrochemicals margins are under pressure and some polymer segments, notably polyethylene, saw declines in production in H116. Nevertheless, the industry is investing in new capacity, with 100,000tpa of extra polymer-grade propylene capacity available from 2018.

Polish petrochemicals producer PKN Orlen has pledged to expand propylene capacity to 550,000 tonnes per annum (tpa), a decision that appears to be justified by the 7.2% y-o-y growth in polypropylene output to 135,000 tonnes in H116. Overall plastic output rose 4.7% over the period. However, the local market in other polymers has come under pressure, with polyethylene output down 3.0% y-o-y to 192,100 tonnes and polyvinyl chloride (PVC) down 13.5% to 140,500 tonnes.

In terms of feedstock for polymer production, ethylene output down 2.3% y-o-y to 272,000 tonnes, while propylene production was down 0.5% to 197,000 tonnes. As a result, while propylene capacity utilisation was a healthy 87.6%, ethylene utilisation was just 71.5%. A 47% rise in oil prices also raised the cost of Poland's naphtha and gasoil supply, which represent 75% and 25%, respectively, of cracker feedstock capacity. Consequently, petrochemicals margins fell 7.6% between January and June to EUR970/t.

## Contents

BMI Industry View

SWOT

Political

Economic

Operational Risk

Industry Forecast

Table: Polish Petrochemicals Sector Capacity, 2012-2020 ('000tpa, unless otherwise stated)

Macroeconomic Forecasts

Economic Outlook

Industry Risk/Reward Index

Europe Petrochemicals Risk/Reward Index

Table: European Petrochemicals Risk/Reward Index (scores out of 100)

Industry Risk/Reward Index

Market Overview

Industry Trends And Developments

Upstream

Company Profile

Polski Koncern Naftowy Orlen (PKN Orlen)

Anwil

Grupa Lotos

Table: Grupa Lotos' Financial Results, 2011-2015 (PLNm)

Regional Overview

Europe Overview

Global Industry Overview

Demographic Forecast

Demographic Outlook

Table: Population Headline Indicators (Poland 1990-2025)

Table: Key Population Ratios (Poland 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Poland 1990-2025)

Table: Population By Age Group (Poland 1990-2025)

Table: Population By Age Group % (Poland 1990-2025)

Glossary

Table: Glossary Of Petrochemicals Terms

Methodology

Industry Forecast Methodology

Risk/Reward Index Methodology

Table: Petrochemicals Risk/Reward Index Indicators

Table: Weighting Of Indicators

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