

Qatar Petrochemicals Report Q3 2016

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Abstracts

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The effects of the US shale gas revolution, low oil prices, high construction costs, China's self-sufficiency and the lifting of sanctions on Iran are all downside risks that are likely to prevent Qatar from capitalising on its indigenous resources.

In 2015, expansions in Qatar's plastic industry increased the country's regional market share to 8% of the total in the Gulf Cooperation Council, according to the Gulf Petrochemicals and Chemicals Association (GPCA). However, with prominent planned projects now postponed or cancelled due to adverse market conditions, its position in the region is set to fall back, with Oman seeing strong growth, the UAE adding to its already massive petrochemicals facilities and Saudi Arabia consolidating its lead. China and India represent the largest markets for Qatar's polyethylene output, but exports to these Asian economic powerhouses are under pressure and the country's petrochemicals industry needs to diversify if it is to defend its profit margins. The prospects for the industry will therefore be determined primarily by the trends in the volatile and uncertain European markets. BMI believes the upshot will be pressure on Qatari margins and potentially lower production volumes, possibly leading to turnaround schedules being moved forwards.

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