

Qatar Petrochemicals Q4 2012

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Abstracts

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BMI's latest Qatar Petrochemicals Report examines future plans for ethylene and derivatives expansion, but warns that declining ethane availability will pose a major obstacle to further development as well as raising the cost of feedstock. The report also assesses trends in export markets such as China and whether production growth can be sustained in the context of the global economic downturn. The progress of planned joint ventures, including engineering and design, are also discussed.

No further developments are likely until after a moratorium on gas allocations is lifted in 2014. QAPCO is due to bring a 300,000 tonnes per annum (tpa) low density polyethylene (LDPE) plant at Mesaieed online by end-2012, raising the company's total LDPE capacity to 700,000tpa and making it one of the world's leading LDPE producers. Separately, the recently completed RLOC cracker is expected to expand during its next maintenance turnaround scheduled for 2013-2014. The plant's ethylene capacity would rise by 300,000tpa to 1.6mn tpa. Downstream projects include Qatofin's plan to raise linear low density polyethylene (LLDPE) capacity at Mesaieed from 450,000tpa to 600,000tpa.

ExxonMobil's JV with QP is likely to be producing in 2016 with a 1.6mn tpa ethane cracker and downstream units – including two 650,000tpa polyethylene (PE) plants and a 700,000tpa ethylene glycol (EG) unit. QP's proposed joint venture with Shell at Ras Laffan is expected to come onstream in 2017.

The plant will become the world's largest MEG site with 1.5mn tpa capacity. Other derivatives, including 300,000tpa linear alpha olefins, which will bring total finished petrochemicals productions to over 2mn tpa, completion is due in 2017.

Qapco's US\$5.5bn joint venture with Total at Ras Laffan is set for completion in 2018, adding capacities of 1.4mn tpa ethylene, 850,000tpa high density polyethylene (HDPE), 430,000tpa LLDPE, 760,000tpa polypropylene (PP), 83,000tpa butadiene and 125,000tpa pyrolysis gasoline. QAPCO's LDPE capacity is also set to rise to 650,000-700,000tpa following the construction of its third LDPE plant. Output is destined for export to emerging markets in Asia, Africa and Latin America.

Over the last quarter, BMI has revised the following forecasts/views:

Qatar's score has declined 0.1 point this quarter due to the deterioration in its institutional and political risk, which is mostly offset by an improvement in its economic structure rating. It lies in fourth place, 0.7 points behind Kuwait and 3.5 points ahead of Israel.

By 2016, Qatar should have ethylene production capacity of 4.5mn tpa and 2.9mn tpa of PE capacity. Projected total ethylene capacity is lower than the 6.0mn tpa previously forecast, reflecting the delays to planned JVs.

Contents

- Executive Summary
- SWOT Analysis
- Qatar Petrochemicals Sector Industry SWOT
- Qatar Political SWOT
- Qatar Economic SWOT
- Qatar Business Environment SWOT
- Global Petrochemicals Overview
- Petrochemicals Market Overview
 - Table: World Ethylene Production By Country, 2011 And 2016 ('000 tonnes capacity)
- Financial Results
 - Table: Financial Results – Major Petrochemicals Companies, 2011
- Global Oil Products Price Outlook
 - Table: BMI Oil Price Forecasts, 2011-2016
- Middle East Regional Overview
 - Table: Planned Ethylene Crackers In The Gulf Region
- Market Overview
 - Table: Qatar's Petrochemical Plants
- Industry Trends And Developments
- Upstream Developments
- Refining
- Olefins
- Fertiliser
- Foreign Investment
- Qatar Petrochemicals Risk/Reward Ratings
- Petrochemicals Middle East And Africa Business Environment Ratings
 - Table: Middle East And Africa Petrochemicals Risk/Reward Ratings
- Qatar's Foreign Investment Policy
- Industry Forecast Scenario
 - Table: Qatar Petrochemicals Sector, 2008-2016
- Macroeconomic Outlook
 - Table: Qatar – Economic Activity
- Company Profiles
 - Qatar Chemical Company (Q-Chem)
 - Qatar Fertiliser Company (Qafco)
 - Qatar Fuel Additives Company (Qafac)
 - Qatar Petrochemicals Company (QAPCO)
 - Qatar Plastic Products Company (QPPC)

Qatar Vinyl Company (QVC)

Glossary Of Terms

Table: Glossary Of Petrochemicals Terms

BMI Methodology

How We Generate Our Industry Forecasts

Chemicals And Petrochemicals Industry

Cross Checks

Business Environment Ratings

Table: Petrochemicals Business Environment Indicators And Rationale

Weighting

Table: Weighting Of Indicators

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