

Russia Petrochemicals Report Q2 2016

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Abstracts

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The Russian petrochemicals industry saw robust output growth as a result of the depreciation of the rouble and the decline in naphtha feedstock costs. However, growth will come under pressure in 2016 due to a sluggish recovery in domestic end-markets. Basic chemicals production rose 6.3% year-on-year (y-o-y) in 2015 with all segments witnessing increases. According to the Federal State Statistics Service of the Russian Federation, production of ethylene exceeded 2.79mn tonnes, up 16.4% y-o-y. However, Russia's petrochemicals sector also suffers from structural inefficiencies which have deterred investment, particularly in the country's oriented production. Challenges include the country's manufacturing sector, which is not competitive without the presence of government incentives. Importantly, we do not expect such hurdles to be cleared in the short-to-medium term, resulting in a subdued outlook for the country's export-led industries.

In 2016, the construction sector is due to contract by 1.2%, while the automotive industry will see output decline 3.1% following heavy slumps in 2015. With these sectors playing a critical role in the petrochemicals markets, they will impact heavily on domestic petrochemicals production across a wide variety of segments.

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