

Russia Petrochemicals Report Q3 2016

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Abstracts

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BMI View: Forthcoming investment projects focusing on import substitution should address the supply/ demand imbalance and move Russia to self-sufficiency; in some segments Russia will become a net exporter. With domestic market growth slower than capacity growth coupled with a weak rouble and low feedstock costs, Russia is likely to lead to far higher levels of exports than previously expected.

The Russian petrochemicals industry is outperforming the overall economy with capacity utilisation rising amid economic conditions that are favourable to the sector. In the January-April period, polypropylene (PP) production grew 7.0% y-o-y and polyethylene terephthalate (PET) output rose 4.6%. Production was boosted by an increase in capacity, stronger domestic demand and a weak rouble that protected the economy from imports. This follows a stronger performance in 2015 when basic chemicals output rose 6.3% and ethylene production grew 16.4%.

However, growth hides the sector's 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.

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