

Saudi Arabia Petrochemicals Report Q2 2016

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Abstracts

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BMI View: Sustained low oil prices are having a profound effect on the Saudi petrochemicals industry. The decline in ethane-naphtha spreads along with a rise in domestic gas prices, which have raised the cost of the country's dominant ethane feedstock, is squeezing Saudi petrochemicals margins. Sanctions relief for Iran will put further downward pressure on naphtha prices, undermining competitiveness at a time when Asian markets are seeing demand soften.

Saudi Arabia is pressing ahead with its drive towards greater feedstock flexibility, with the new mixed-feed Sadara complex ramping up production in 2016. While this should buffer it against the challenge posed by competition with shale-derived ethane-based production in the US, coal-to-olefins production in China and Asian producers are benefitting from the drop in naphtha prices. Saudi Arabia is also seeking to diversify into a broader and higher value-added product chain in order to see off challenges from Iran and other producers that are rapidly increasing their global market share.

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