

Thailand Petrochemicals Report Q3 2016

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Abstracts

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BMI View: Thailand's petrochemicals industry is poised for higher sales volumes in 2016 on the back of higher capacity utilisation and expansion and improved margins. Thai petrochemicals producer PTT Global Chemical Public Company has secured an increase in ethane supply for the year, which will support cracker output growth and margin expansion. However, in the long run, Thailand is likely to see more orientation towards naphtha feed and increased efforts to add value to output as it diversifies feedstock in order to become more profitable.

Naphtha-polyolefins spreads are likely to remain strong in 2016, even as new capacity comes onstream. However, this will have a mixed impact on Thai producers. Thailand's naphtha-based petrochemicals production will benefit from lower oil prices, but gas producers will see margins squeezed. The price movements affected Thai producers in different ways in 2015 with Siam Cement Group (SCG), the largest naphtha-based producer, reporting an improvement in chemical margins while gas-based producer PTTGC saw earnings drop. Margins will influence the competitiveness of Thai producers, who are increasingly reliant on external markets. We expect cooling regional demand stemming from a broad economic slowdown in the region - particularly in China and Japan, which are Thailand's largest and fourth largest export destinations - to persist. In the first four months of 2016, the chemicals trade deficit totalled THB6.4trn. This represented a decline of 14.9% year-on-year (y-o-y) with exports declining 1.1% y-o-y to THB53.5trn while imports fell 2.1% to THB59.9trn.

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