

Turkey Petrochemicals Report Q4 2016

<https://marketpublishers.com/r/T0BA5DCD95FEN.html>

Date: September 2016

Pages: 78

Price: US\$ 1,295.00 (Single User License)

ID: T0BA5DCD95FEN

Abstracts

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BMI View: Turkey's coup attempt has shaken the petrochemicals industry with arrests of senior managers of the local producer Petkim, but its Azerbaijani majority owner SOCAR is likely to continue investments. The pre-coup outlook had been brightening and Turkey remains a significant importer, although depreciation will support local production.

Petkim's expanded ethylene plant, which has seen capacity increase from 520,000 tonnes per annum (tpa) to 600,000tpa, supported petrochemicals output growth in H116. The concurrent increase in purified terephthalic acid (PTA) capacity from 70,000tpa to 105,000tpa also helped lift chemicals output and provided cheaper feedstock for polymers production. Petkim reported 6.4% year-on-year (y-o-y) production volume growth in H116, taking total petrochemicals output to 1.64mn tonnes. This came on the back of its external product sales growth of 14.4% to 935,700 tonnes. Capacity usage at its 3.6mn tpa complex was up percentage points compared to H115 to 94%.

The main risks are further challenges to President Erdogan's authority, both from the military and terrorism, as well as souring relations with the EU. At present, Erdogan is using the attempted coup to consolidate his authority, which may well improve political certainty so long as he continues to command popular support. Trade with the EU is crucial and while it appears the political situation has put the issue of EU membership off the cards, both sides continue to see a net positive in maintaining trade and investment relations. However, political considerations - particularly in the event of a break with NATO - would significantly undermine relations, potentially leading to European firm- slowing investment in plants with a corresponding crimping of petrochemicals demand.

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