

Ukraine Petrochemicals Report Q2 2016

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Abstracts

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Ukraine's petrochemicals industry will remain beset with the problems caused by the country's political turmoil and resulting economic collapse. The devaluation of the hryvnia has added to the economic headwinds, while the end-markets for petrochemicals - notably the automotive and construction sectors - remain in a slump. Even if consumption does recover, a return to pre-crisis levels of petrochemicals output is unlikely and polymer and fertiliser plants will produce at a fraction of capacity, if they are operating at all.

BMI estimates that in 2015, rubber and plastic production was down 11% y-o-y, with rubber output falling 20% y-o-y and plastic down 9%. The rate of rubber output decline eased in H215 with some growth from September. However, growth in the final months of 2015 was from a very low base and well below the rate necessary to return to pre-crisis levels. Further upstream, most of Ukraine's refineries remain closed as of 2015 leading to a severe underutilisation of its refining capacity with knock-on effects for the country's embattled petrochemicals industry, which lacks sufficient local feedstock access.

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