

Ukraine Petrochemicals Report Q4 2016

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Date: September 2016

Pages: 73

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

ID: U5E1295BA94EN

Abstracts

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BMI Industry View The Ukrainian petrochemicals industry will remain in crisis, with Lukoil seeking to withdraw from the sector, announcing that it is putting its local polymers subsidiary, Karpatneftekhim, up for sale. With much of the country's petrochemicals industry effectively mothballed and the industrial sector in the doldrums, any growth will come from a very low base. Consumption will increasingly require imports, although this will be moderated by currency depreciation.

Ukraine's largest petrochemicals producers - the fertiliser producer Stirol, which operates in the troubled east, and Lukoil-owned Karpatneftekhim - have been shut, with no firm plans to re-open them at the time of writing. As a result, we have removed from our forecast Ukraine's ammonia, urea, polyethylene and polyvinyl chloride (PVC) capacities.

On the demand side, low consumer confidence and spending and a weak business investment will mean domestic demand will not be able to pick up the slack from falling export demand. The majority of manufacturers operating in Ukraine are heavily linked to the Russian market. Thus, the breakdown in Russia-Ukraine relations due to the ongoing political and economic malaise in the country presents the most severe downside pressure for our production forecasts, as trade relations between Ukraine and Russia are likely to deteriorate further without a clear solution to the crisis.

In H116, imports of polyethylene (PE) increased 33% y-o-y to 128,000 tonnes, according to MRC Datascope. Imports were led by high density polyethylene (HDPE) and linear low density polyethylene (LLDPE). Meanwhile, imports of polypropylene (PP) into Ukraine increased 36% y-o-y to about 57,600 tonnes.

In H116, monthly rubber output growth averaged 66.5% y-o-y, but plastic output grew just 3.3%. The main factor was base effects, with rubber having seen a sharper drop in previous quarters. However, plastic has yet to make this recovery, largely due to the operational problems at the country's polymer plants.

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