

# United Arab Emirates Petrochemicals Report Q3 2016

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## Abstracts

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The UAE is set to face a challenging year as it doubles output at the massive Borouge petrochemicals complex. The combination of an end to sanctions on Iran, a Chinese slowdown and Saudi Arabia's opening of its massive Sadara complex will work to keep petrochemicals prices low. Meanwhile, the UAE's dominant ethane feedstock will struggle to compete with falling oil-derived naphtha feedstock used by rivals in Asia and Europe. The Gulf Cooperation Council (GCC) is seeing a slowdown in petrochemicals output growth, which fell to 7.5% in 2015 from 11% CAGR in 2004-2014, and is set to fall to 3.2% on average over the next five years. Constraints in gas supply have been blamed and this tightness in the gas market is leading to upward pressure on ethane costs.

Ethane availability and feedstock pricing will remain key to the growth of the UAE's petrochemical industry. Rising feedstock prices, limited ethane feedstock availability, increasing construction costs and the anticipation of slower demand growth in key markets are expected to lead to a decline in the number of new project announcements. A significant risk factor for the UAE's petrochemicals industry is its current reliance on naphtha feedstock.

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