

United Kingdom Petrochemicals Report Q4 2016

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Abstracts

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BMI View: Brexit has cast considerable uncertainty over the British petrochemicals industry's future with the possibility of an end to European single market access and Scottish independence leading to likely capacity cuts. The sector is benefitting in the short term from a boost in external competitiveness as a result of the fall in the value of the pound. In the long term, if it can maintain tariff-free access to mainland markets and the US continues exporting ethane from its shale resources, the UK could remain stronger than EU states. However, this is based on many requisites that will have to be met if the industry is to survive and thrive.

Before the Brexit vote, the UK petrochemicals industry was witnessing a contraction in output. Production indices showed that petrochemicals output fell by an average of 3.4% in January-April 2016, while chemicals output declined 3.8%. Rubber and plastic production saw a more marginal decline of 0.1%. The UK's Chemical Industries Association (CIA) had noted that businesses expected sales volumes to remain or exceed 2015 levels when there was 5% growth with growth led by exports, but its surveys were conducted at a time when the referendum result was expected to confirm the status quo. Producers in the chemicals sector overwhelmingly supported remaining in the EU and some warned that leaving the union would cause significant disruption that could damage the sector.

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