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info@marketpublishers.com

United States Petrochemicals Report Q3 2016

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Abstracts

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BMI View: Recent resurgence in the industrial sector and balanced chemical inventories bodes well for future chemical production. Although polymers continue to see healthy growth due to demand from manufacturers of consumer products and light vehicles, other sectors are less healthy and US exports have suffered as a result of a strong US dollar.

In 2016, the US petrochemicals industry is likely to witness more downside risk. The American Chemistry Council (ACC)'s Chemical Activity Barometer (CAB) three-month moving average (3mma) index expanded 1.0% in May following a 0.8% increase in April and 0.1% increase in March. The CAB was up 2.3% y-o-y, compared to 2.7% growth in the previous May. Lower rates of growth are indicative of the US's move towards full capacity utilisation, as well as the country's near-total self-sufficiency in basic polymers, even at a time of rising demand.

US ethylene production in Q116 grew 10% y-o-y to 6.8mn tonnes, according to the American Fuel and Petrochemical Manufacturers (AFPM). Ethylene inventories totalled about 816,000 tonnes, up 125% y-o-y and 14% q-o-q. Feedstock ethane consumption was also up 10% y-o-y to 6.1mn tonnes. Propane and butane usage also increased compared to the same period last year, while naphtha feeds were down.

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