

GLOBAL POLYOLEFIN MARKET FORECAST 2017-2025

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Abstracts

KEY FINDINGS

The Global polyolefin market generated a revenue of 152 million metric tons in 2016 and is anticipated to contribute 263 million metric tons by 2025, growing at a CAGR of 6.38%. Various reasons for growth of the polyolefin market are preference of finished plastics, increase in consumption across various industries, growing construction sector, higher need for flexible packaging and modifying raw material scenario.

Polyolefin is a class of polymers that are made from one monomer (olefin) consisting of only hydrogen and carbon atoms. These are high molecular weight hydrocarbons and it is determined by its weight and degree of crystallinity. These have very high chemical resistance, chemically stable and are unaffected by chemical solvents. These cannot be joined using solvent welding. These are preferred over metallic and nonmetallic substitutes due to their longer durability, lighter weight and resistance to physical and chemical attacks. Polyolefins used across a wide variety of industrial and commercial applications.

Polyolefin market is segmented on the basis of geography, type, end user and application. Polyolefins find applications in industries such as film and sheet, injection molding, blow molding and fibers and tapes. Polyolefins can be classified as polyethylene, polypropylene, polybutene and others. Polyethylene can be further classified as high-density polyethylene, low-density polyethylene and linear low-density polyethylene. End users for polyolefins are construction industry, transportation industry, electrical and electronics, consumer goods, healthcare and medical and others.

MARKET INSIGHTS

Market drivers for polyolefins are increase in demand from end use industries like construction and automotive, improving economies has led to higher construction activity, increasing disposable incomes, higher demand for flexible packaging, modifying raw material scenario and favorable government policies.

Polyethylene has the largest market share of all polyolefins. Market factors driving growth of polyethylene are its low cost, capability to be fabricated by using modern technologies such as extrusion, blow molding, calendaring and injecting molding and rubber like properties that make them suitable for high performance industrial application. Polyethylene has a current market share of around 36% of the whole world plastics market followed by polypropylene at 20%. Polyethylene will continue to dominate the market share for polyolefins in the forecast period as well. Low density and high density polyethylene are being used to develop sustainable and high quality packaging films.

Films and sheets were the biggest application segment and are expected to continue growing in the forecast period due to increase in demand for construction, packaging and trash bags. Injection molding will be the fastest growing segment in the forecast period due to increase in demand from manufacturing, automotive components and electrical and electronic appliances. It is expected that there will be high volumetric consumption of fiber & tapes in beverage and FMCG bottling. High demand for green building materials and polymers is likely to be a market booster for this industry in the forecast period.

Factors that will restrain market growth are high capacity to demand ratio, unstable crude oil and natural gas supplies and environmental concerns.

REGIONAL INSIGHTS

Market regions that are covered in the report are North America, Europe, Asia-Pacific and RoW. Asia-Pacific market has the highest market share in the polyolefin market and accounted for 46% global polyolefin consumption. It is expected to report fastest growth in the forecast period as well. Reason for such high growth in the Asia-Pacific region is growth of industrial and construction activity. China has the highest market share followed by India. Thailand, Malaysia and Indonesia have multiple manufacturing facilities. Middle East is expected to be the largest exporter of polyolefins in the forecast period.

North America will report growth in the coming years. Demand from growing automotive industry will drive the North American market growth. Europe market growth will be not be at a very high pace.

COMPETITIVE INSIGHTS

The major market players for polyolefin are LyondellBasell Industries NV, China Petroleum & Chemical Corporation, The Dow Chemical Company, Saudi Basic Industries Corporation, E.I. Du Pont, ENI S.P.A., Neos Group AG, Repsol S.A., Sasol Ltd. and Chevron Phillips Chemical Company. Companies are forming alliances and are going for mergers and acquisitions to strengthen their market position. Organizations are investing in research and development to come up with novel and innovative products that will capture new market share.

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