

Global Petrochemicals Market: By Type (C1 Derivatives, C2 Derivatives, C3 Derivatives, C4 Derivatives, Aromatics, Others), By End Use (Packaging and Construction, Fuel and Fuel Additives, Automotive and Consumer Durables, Pharmaceutical and Agrochemicals and Others), By Region, By Company Competition, Forecast & Opportunities, 2015-2025

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Abstracts

The global petrochemicals market has witnessed healthy growth between 2015-2019 and is estimated to grow at a CAGR of 4.80% during the forecast period. Growing penetration of petrochemical products across plethora of end-use industries such as packaging, automotive, consumer durables, textile and construction sectors is expected to drive the petrochemicals market growth until 2025.

Petrochemicals are omnipresent, with their usage increasing across our countless, daily life applications. Increasing demand for Methanol (obtained from C1 stream) for industrial applications like manufacturing formaldehyde, API formulations, dyes & intermediates, agrochemicals etc., and its growing adoption as a clean-burning fuel in transports is likely to spur the global petrochemicals demand in the forecast period. Growing demand for petrochemical products used in plastic packaging for food and other commercial products such as Polyethylene (C2 stream) and Polystyrene (aromatics) due to their inexpensive, lightweight and high-performance characteristics is expected to propel the market growth in the coming years. Excellent barrier properties which allow food to remain fresh for longer durations are expanding the scope of polyethylene plastics over other packaging materials, thereby increasing the

petrochemicals consumption across the globe. Moreover, with major economies across the globe making hefty investments to support their passenger and commercial automotive manufacturing, the global demand for rubber tyres, mainly derived from the petrochemical Butadiene (an output from C4 stream) is anticipated to improve in the forecast period. An additional market driver is the growing consumption of petrochemicals-based laundry detergents and textile fibers with ever changing consumer preferences. Supported with growing manufacturing of Benzene-based derivatives, the demand outlook of the industry is likely to turn bullish in the upcoming years.

On the basis of type, C2 & C3 derivatives cumulatively held more than 48% of the global petrochemicals demand share in 2019. The sectoral demand is likely to trigger tremendous growth in the global petrochemicals industry due to their growing consumption across engineered plastics, medical plastics, packaging films and many other end-use industries, backed by intensive research & development initiatives by leading manufacturers across the globe.

Geographically, Asia Pacific dominates the global petrochemical market, followed by North America and Western Europe. Massive capacity addition plans in the coming years and increasing mergers and acquisitions to support the skyrocketing regional demand are the factors propelling the Asian petrochemicals demand. Moreover, several FDI flows from outside Asia looking at the favorable government policies and demographic trends, would further drive the Asian market growth in the forecast period.

The outbreak of the COVID-19 dented the global petrochemicals industry, rendering the global industrial production to remain at standstill during Q2 and Q3 2020. The biggest impact was on demand of downstream derivatives such as clothing and automotive which crashed to historic lows in short term. Unprecedented crash in upstream crude oil as an outcome of the historic oil-price war further hurt the overall refinery run rates. However, soaring demand for personal hygiene products which increased consumer focus over C3 derivative polymers for manufacturing masks, PPE kits and disposable items, kept the sentiments uplifted. In longer terms, it is anticipated that spurt in the global petrochemicals demand as several economies ramp up their refining capacities and invest on latest manufacturing technologies would further accelerate the market growth in the forecast period.

Years Considered for this Report:

Historical Years: 2015 – 2018

Base Year: 2019

Estimated Year: 2020

Forecast Period: 2021 – 2025

Objective of the Study:

The primary objective of the study was to evaluate and forecast Petrochemicals capacity, production, demand, inventory, and demand–supply gap globally.

To categorize Petrochemicals demand based on type, end use, region and company share.

To evaluate and forecast Petrochemicals pricing globally.

To identify and profile major companies operating globally Petrochemicals market.

To identify dominant region or segment in the global Petrochemicals market.

To identify drivers and challenges for global Petrochemicals market.

The global petrochemicals market is highly fragmented. Some of the major players operating in the global petrochemicals market are LyondellBasell Industries N.V., Sinopec, SABIC, The Dow Chemical Co., Ineos Group, BASF S.E and others. LyondellBasell Industries N.V. held the largest market share of around 4% as of 2019. Continued exploration for oil and gas reserves with numerous players carving out their subsidiaries to capitalize on the market opportunities emanating across the globe would further act as a driving force. Some of the major projects scheduled for 2021 are-a Shell Chemical's upcoming chemicals project in Pennsylvania, a joint venture of ExxonMobil and SABIC in Texas which is already under construction. Moreover, merger of Chevron Phillips and Qatar Petroleum on the Gulf Coast, and a huge Formosa Petrochemical project in Louisiana are awaiting final investment decisions.

The pricing of petrochemicals is largely dependent on fluctuations in crude oil, Natural Gas and other upstream sources. Petrochemicals prices remained under pressure in the first half of the year weighed over by demand slowdown and unprecedented fall in crude futures during Q1 and Q2 2020.

To extract data for global petrochemicals market, primary research surveys were conducted with Petrochemicals manufacturers, suppliers, distributors, wholesalers and end users. While interviewing, the respondents were also inquired about their competitors. Through this technique, ChemAnalyst was able to include manufacturers that could not be identified due to the limitations of secondary research. Moreover, ChemAnalyst analyzed various end user segments and projected a positive outlook for Global Petrochemicals market over the coming years.

ChemAnalyst calculated Petrochemicals demand globally by analyzing the historical data and demand forecast which was carried out considering imported styrene prices, a monomer used for production of Petrochemicals. ChemAnalyst sourced these values from industry experts and company representatives and externally validated through analyzing historical sales data of respective manufacturers to arrive at the overall market size. Various secondary sources such as company websites, association reports, annual reports, etc., were also studied by ChemAnalyst.

Key Target Audience

Petrochemicals manufacturers and other stakeholders

Organizations, forums and alliances related to Petrochemicals distribution

Government bodies such as regulating authorities and policy makers

Market research organizations and consulting companies

The study is useful in providing answers to several critical questions that are important for industry stakeholders, such as Petrochemicals manufacturers, distributors and policymakers. The report also provides useful insights about which market segments should be targeted over the coming years to strategize investments and capitalize on growth opportunities.

Report Scope:

In this report, the Global Petrochemicals market has been segmented into following categories, in addition to the industry trends which have also been detailed below:

Market, by Type : C1 Derivatives, C2 Derivatives, C3 Derivatives, C4

Derivatives, Aromatics, Others

Market, by End Use : Packaging and Construction, Fuel and Fuel Additives, Automotive and Consumer Durables, Pharmaceutical and Agrochemicals and Others

Market, by Region : North America, APAC, Europe, MEA, South America

Market, by Region

North America : United States, Mexico, Canada

APAC : China, India, Japan, South Korea, Taiwan, Australia, Thailand

Europe : Germany, France, United Kingdom, Spain, Italy

MEA : Saudi Arabia, UAE, Iran, South Africa

South America : Brazil, Argentina, Colombia

Competitive Landscape

ChemAnalyst offers detailed analysis of major players including basic company details, Segmental/product information, financial matrices, growth strategies, expansion plans, collaborations, SWOT analysis etc.to give a comprehensive and meaningful insights on the respective product market.

Available Customizations:

With the given market data, ChemAnalyst offers customizations according to a company's specific needs.

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- 3.Lotte Chemical
- 4.Formosa Plastics Corporation
- 5.China Petroleum & Chemical Corporation (Sinopec)
- 6.INEOS

- 7.The DOW Chemical Company
- 8.LyondellBasell Industries N.V
- 9.SABIC
- 10.Reliance Industries Ltd.

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