

Propane Dehydrogenation (PDH) to Propylene Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029 Segmented By Derivative (Polypropylene, Polypropylene Oxide, Acrylonitrile, Others), By End User (Automotive & Transportation, Construction, Packaging, Electrical & Electronics, Others), By Region and Competition

<https://marketpublishers.com/r/PE14673AAC19EN.html>

Date: February 2024

Pages: 172

Price: US\$ 4,900.00 (Single User License)

ID: PE14673AAC19EN

Abstracts

Propane Dehydrogenation (PDH) to Propylene Market was valued at USD 10.13 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.21% through 2029. Propane Dehydrogenation (PDH) is an industrial process used to convert propane into propylene, an essential building block for various chemical products such as polypropylene, acrylonitrile, and propylene oxide. The PDH to Propylene Market refers to the sector that encompasses the production, supply, and demand dynamics of propylene through PDH technology. This market is influenced by factors such as the availability of raw materials, technological advancements, global economic conditions, and the downstream demand for derivative products. The growth of this market is closely tied to the expansion of industries that use propylene as a primary feedstock.

Key Market Drivers

Growing Demand of Propylene and its Derivatives

The potential for profitable propylene production is becoming increasingly apparent. In 2018, polypropylene accounted for 68% of the total end-use demand of propylene. The production of polypropylene is becoming increasingly important as the expanding

middle class, particularly in developing countries, requires more plastic for a variety of consumer products, including kitchenware and food containers, clothing, carpets, and car batteries. Polypropylene is widely regarded as one of the most adaptable plastics, and propylene producers have been unable to meet the ever-growing demand for propylene due to the high demand generated by the polypropylene industry. The traditional by-product sources of propylene are Steam cracking and Fluid Catalytic Cracking (FCC). This gap has been increasing since 2011 and is expected to continue to grow. Propylene production technologies such as dehydrogenation are being developed to fill this gap.

Rising demand for Polypropylene in Food Packaging

Polypropylene is an optical clear glossy film that is highly resistant to punctures and has a moderate resistance to moisture, gases, and odors. It is also able to stretch, although at a lesser rate than polyethylene, and is employed in similar applications as LDPE. Additionally, Oriented Polypropylene has good optical properties, a high tensile strength, and a high puncture resistance. Furthermore, it has a moderate permeability to gas and odor levels, and a higher resistance to water vapor levels, which are not affected by fluctuations in humidity. This material is commonly used to package biscuits, snack foods, and dried foods.

Polypropylene is an ideal material for the packaging of food products, as it does not react with food and is highly resistant to pilferage and contamination. Furthermore, it is the most cost-effective packaging medium when compared to any other material, as it is lighter and less likely to cause damage during transportation. Furthermore, polypropylene can be processed in a variety of ways, allowing it to be used to package any type of material, including liquids, powders and flakes, as well as granules and solids. Furthermore, it offers a longer shelf life than other packaging materials.

Increasing Regulations to Promote the Use of Lightweight Materials

Governments around the world are increasingly regulating the use of lightweight materials in order to promote fuel efficiency and reduce emissions. These regulations are being driven by a number of factors, including concerns about climate change, the need to improve air quality, and the rising cost of fuel. One of the most significant examples of this trend is the European Union's (EU) CO₂ emissions regulations for cars. The EU has set a target of reducing CO₂ emissions from new cars by 37.5% by 2030. In order to meet this target, car manufacturers will need to use more lightweight materials in their vehicles. The regulations on lightweight materials are having a

significant impact on the automotive industry. Car manufacturers are investing heavily in research and development of new lightweight materials, and they are also working to improve the manufacturing processes for these materials. As a result, the cost of lightweight materials is coming down, and they are becoming more widely used in vehicles.

The trend towards increasing regulations on lightweight materials is likely to continue in the future. As governments become more concerned about climate change and air quality, they will continue to put pressure on the automotive industry to use more lightweight materials. This will lead to further innovation in the development of new lightweight materials, and it will also help to reduce the environmental impact of transportation.

Integration with Shale Gas Production

The integration of propane dehydrogenation (PDH) with shale gas production is significantly driving the demand for PDH to propylene globally. Shale gas, abundant and accessible through advanced extraction techniques, has emerged as a key feedstock for PDH units, providing a cost-effective and reliable source of propane. As shale gas production continues to expand, so does the availability of propane, which serves as the primary raw material for propylene production via PDH. Propylene, a vital building block in the petrochemical industry, is in high demand for the manufacturing of plastics, resins, and synthetic fibers. Consequently, the increased integration of PDH with shale gas production enables efficient and scalable propylene production, meeting the growing global demand for this essential chemical. Furthermore, the synergy between shale gas extraction and PDH processes contributes to enhanced supply chain integration and resilience, bolstering the competitiveness of propylene production on the global stage. Thus, the integration of PDH with shale gas production is playing a pivotal role in meeting the surging demand for propylene worldwide.

Key Market Challenges

Fluctuating Raw Material Prices

Fluctuating raw material prices pose a significant challenge to the demand for propane dehydrogenation (PDH) to propylene globally. As propane is the primary feedstock for PDH units, any fluctuations in its price can directly impact the economics of propylene production. Volatility in crude oil and natural gas markets, which influence propane prices, can lead to uncertainty and risk for producers considering investments in PDH

projects. Moreover, unpredictable shifts in supply and demand dynamics for propane can further exacerbate price fluctuations, creating challenges for propylene manufacturers in planning and budgeting. Additionally, the downstream industries reliant on propylene derivatives may face increased production costs or pricing pressures due to variability in propylene prices, potentially dampening demand for these products. Consequently, the uncertainty surrounding raw material prices can deter investments in PDH technology and hinder the growth of the global propylene market, as producers seek more stable and cost-effective alternatives for propylene production.

Complexity Of PDH Technology Demands High Capital Expenditure

The complexity of propane dehydrogenation (PDH) technology entails high capital expenditure, presenting a challenge to the demand for PDH to propylene globally. PDH units require substantial upfront investment due to the intricate nature of the technology involved. The process involves sophisticated reactors, catalysts, and purification systems, which require precise engineering and construction to ensure efficient and reliable operation. Moreover, the complexity of PDH technology necessitates extensive expertise in process design, operation, and maintenance, adding to the overall cost burden for propylene producers. High capital expenditure requirements may deter potential investors from pursuing PDH projects, particularly in regions with limited access to financing or where regulatory uncertainties prevail. Additionally, the long lead times associated with project development and construction further exacerbate the financial risks associated with PDH investments. Consequently, the complexity and high capital expenditure demands of PDH technology act as barriers to its widespread adoption globally, hindering the growth of the propylene market and driving the exploration of alternative propylene production methods with lower investment requirements.

Key Market Trends

Surge in Consumption of Propylene Derivatives

The surge in consumption of propylene derivatives is driving a notable increase in the demand for propane dehydrogenation (PDH) to propylene globally. Propylene, a versatile chemical, serves as a crucial building block in the production of a wide array of derivatives, including polypropylene, propylene oxide, acrylic acid, and acrylonitrile, among others. With rapid industrialization, urbanization, and changing consumer preferences worldwide, the demand for propylene derivatives is experiencing a substantial upswing. Polypropylene, in particular, is witnessing robust growth due to its

widespread applications in packaging, automotive components, textiles, and consumer goods. As a result, manufacturers are increasingly turning to PDH technology to meet the escalating demand for propylene derivatives. PDH offers advantages such as high efficiency, flexibility, and lower capital costs compared to alternative propylene production methods, making it an attractive choice for propylene manufacturers seeking to expand their production capacity. Therefore, the surge in consumption of propylene derivatives is fueling the global demand for PDH to propylene, driving investments in PDH projects to ensure an adequate supply of propylene for downstream industries.

Increased Use in End-use Industries

The increased use of propylene in end-use industries is significantly boosting the demand for propane dehydrogenation (PDH) to propylene globally. Propylene serves as a fundamental building block for a diverse range of industries, including automotive, packaging, construction, textiles, and healthcare. With the expansion of these sectors, there is a corresponding surge in demand for propylene-based products such as polypropylene, acrylonitrile, propylene oxide, and acrylic acid. These derivatives find application in various everyday items, ranging from plastic packaging and automotive components to textiles and medical devices. As a result, manufacturers are seeking reliable and efficient methods to produce propylene, leading to increased adoption of PDH technology. PDH offers several advantages, including high yield, operational flexibility, and lower environmental impact compared to alternative methods of propylene production. Consequently, the growing utilization of propylene in end-use industries is driving investments in PDH projects globally to ensure a stable and sufficient supply of propylene to meet the escalating demand from downstream sectors.

Segmental Insights

Derivative Insights

Based on the Derivative, in the Global Propane Dehydrogenation (PDH) to Propylene market, Polypropylene has emerged as a dominant segment. Its widespread use in various industries, including packaging, automotive, construction, and consumer products, is driven by its versatile properties such as excellent chemical resistance, exceptional durability, remarkable flexibility, and outstanding thermal stability. These unique characteristics make polypropylene an ideal choice for a wide range of applications, from packaging materials that require resistance to harsh chemicals and extreme temperatures to automotive parts that demand high durability, flexibility, and heat resistance. Furthermore, polypropylene's low density and excellent electrical

insulation properties contribute to its popularity in industries such as electronics and telecommunications. As a result, the increased production of polypropylene is not only a reflection of the market's enthusiastic response to its ever-expanding range of applications but also a testament to its unmatched performance and reliability in meeting diverse industry needs.

End User Insights

Based on the end-user segment, The Global Propane Dehydrogenation (PDH) to Propylene Market is currently being dominated by the packaging sector. This is largely due to the high demand for polypropylene, which is an essential raw material for various packaging products. Polypropylene's attributes of being lightweight, versatile, and resistant to many chemical solvents, acids, and bases contribute to its extensive use in food and consumer goods packaging, which in turn propels the growth of PDH to propylene within this market segment. Moreover, the increasing consumer preference for eco-friendly and sustainable packaging solutions has further fueled the demand for polypropylene-based packaging materials. As awareness about environmental impact grows, businesses are seeking alternatives to traditional packaging materials, and polypropylene emerges as a suitable choice due to its recyclability and low carbon footprint.

Additionally, the versatility of polypropylene enables it to cater to a wide range of packaging needs. Its ability to be molded into different shapes and sizes makes it suitable for various industries, including food and beverage, pharmaceuticals, and personal care. With the rising e-commerce sector, the demand for efficient and protective packaging solutions has soared, and polypropylene plays a crucial role in meeting these requirements. The dominance of the packaging sector in the Global Propane Dehydrogenation (PDH) to Propylene Market is driven by the high demand for polypropylene, which offers lightweight, versatile, and eco-friendly packaging solutions. As the need for sustainable packaging continues to grow, the market for PDH to propylene is expected to witness significant expansion within this market segment.

Regional Insights

The Asia-Pacific region emerges as the dominant force, showcasing its supremacy through a combination of factors. The region's unrivaled position is primarily attributed to the unprecedented pace of industrial growth observed in countries like China and India. This remarkable growth is further fueled by the surging demand for propylene-derived polymers across multiple industries, including packaging, automotive, textiles,

and construction. The dynamic Asia-Pacific region serves as a hub for innovation and technological advancements, attracting investments and fostering collaborations. As industrial activities continue to flourish and demand for propylene-based products keeps soaring, the Asia-Pacific region solidifies its position as the powerhouse of the Global Propane Dehydrogenation to Propylene Market, driving economic growth and shaping the future of the industry.

Key Market Players

LyondellBasell Industries Holdings B.V.

Borealis AG

BASF SE

INEOS Group Limited

Dow Chemical Company

Formosa Plastics Corporation

Oriental Energy Co. Ltd.

Ascend Performance Materials

Koch Industries, Inc.

KBR Inc.

Report Scope:

In this report, the Global Propane Dehydrogenation (PDH) to Propylene Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Propane Dehydrogenation (PDH) to Propylene Market, By Derivative:

Polypropylene

Polypropylene Oxide

Acrylonitrile

Others

Propane Dehydrogenation (PDH) to Propylene Market, By End User:

Automotive & Transportation

Construction

Packaging

Electrical & Electronics

Others

Propane Dehydrogenation (PDH) to Propylene Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Propane Dehydrogenation (PDH) to Propylene Market.

Available Customizations:

Global Propane Dehydrogenation (PDH) to Propylene market report with the given

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market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

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