

# Vietnam Petrochemical Comprehensive Report

## Q2/2018

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### Abstracts

#### VIETNAM PETROCHEMICAL INDUSTRY

Petrochemicals and oil refining are two areas in the oil and gas processing industry. These two areas are two consecutive and intertwined phases of the entire oil and gas processing industry. Petrochemical is a heavy industry that plays an important role in the development of many countries around the world, providing a great source of raw materials for many other industries such as plastics, garments, chemicals, etc. Petrochemical inputs are products of the oil and gas industry, namely products of refineries and natural gas processing plants such as naphtha, ethane, propane and LPG. Petrochemical products include primary products such as ethylene, propyl naphthalene, butadiene, benzene, xylene, toluene, methanol ... and secondary products such as polyethylene, polypropylene, LDPE, etc.

In the period 2012-2022, global production of primary petrochemical products is estimated to grow at a CAGR of 4.29%. In 2017, primary production of petrochemical products will reach around xxx.x million tons. In 2016, the total output of polymer on the world market will be about 335 million tons, the annual growth rate will be 5.2% in the period 2010 - 2016. Demand for petrochemical products is on the upward trend.

In general, in 2017, according to the Platts Global Petrochemical Index (PGPI), petrochemical prices rose slightly between January and March, then fell from April to July and rebounded from August to the end of the year. In the first quarter of 2018, PGPI is cooling down due to the impact of crude oil prices. At present, almost all petrochemical refineries in Vietnam are supplied by Dung Quat oil refinery of PVN, with the rest coming from the Cat Lai refinery with a capacity of 2,000 barrels a day. Vietnam's oil refining capacity could triple in the next five years, from 140,000 barrels per day in 2016 to xxx barrels per day by 2020, with two new refineries Nghi Son

(200,000 barrels per day) and Vung Ro (160,720 barrels per day), scheduled to come into operation in 2017 and 2018.

The demand for petrochemical products is high, but the domestic production capacity is unable to meet. According to the Vietnam Packaging Association (VIPAS), in recent years, the plastic packaging industry has also grown at an average annual growth rate of more than 25% as food and foodstuffs grow. This will be the driving force for domestic petrochemicals as demand grows.

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