

# CHEMICAL MARKET ANALYTICS

BY OPIS, A DOW JONES COMPANY

## Plastics & Polymers

---

# Our solutions provide the cutting-edge research and forecasts necessary to gain a competitive edge

## Near term outlook – Market analysis

Asia/Middle East/India plastics & polymers

Asia polyethylene

Asia polypropylene

China polyolefins

Europe plastics & polymers

Europe polyethylene

Global engineering resins

Global plastics & polymers

Global vinyls

Latin America plastics

North America polyethylene

North America polypropylene

PET stream

North America light olefins daily

- Market prices, costs, and/ or margins (historical, current, forecast)
- Extensive expert commentary on prices, margins, trade, market conditions, operational issues and future trends impacting markets
- Quarterly supply/demand balances and trade flows

## Long term outlook – World analysis

ABS

Ethylene dichloride

Expandable polystyrene

Nylon engineering resins

Paraxylene

Polyester

Polyethylene

Polypropylene

Polystyrene

Polycarbonate

PTA/DMT

PVC resins

Vinyl chloride monomer

- Supply demand database updated bi-annually
- Real time global capacity database
- Detailed country-level trade grids updated bi-annually
- Forecasts for price, cost and margin updated quarterly
- Upside and downside sensitivities



# Market Advisory Services

Provides Data-Based Analytics and Price Assessments

Chemical Market Advisory Services provide the industry's most comprehensive price and economics discovery, near-term analysis and forecasts of global chemical markets. Through continual, personal contact with key industry sources, our research experts gather and analyze the salient data, which they then translate into valuable insights and forecasting advice.

Clients receive the near-term outlook for major upstream and downstream market conditions and behavior fundamentals, including prices, costs, and/ or margins, supply/demand, and trade flows. In addition to a detailed analysis of the market data, the experts review the cause-effect of the behaviors, explaining not only what is occurring but why it is occurring as well as the forecast and logical basis of the future behavior of the market.

Over 30 product-specific services and industry experienced consultants in the major regions of the world provide objective, quantitatively rigorous, independent perspectives on the market. Benefits include client access to our weekly updated pricing and economics database, including forecasts, and to our research experts for market advice directly related to the respective service.

## Who uses this service?

Producers, Consumers, Traders, Logistics companies, End-users, and Financial entities depend on our Market Advisory Services to obtain accurate and unbiased near-term intelligence on the world's major chemical markets. Personas using the services include, Procurement, Sales & Marketing, strategic planners, product managers, business leaders, financial analysts.

## Program Scope

The Market Advisory Services provide accurate current near-term market data and analysis for five basic chemical families. Depending on content and client needs, the services distribute daily, weekly, bi-weekly or monthly reports and/ or data supplements.

### Report Contents

- Market prices, costs, and/ or margins [historical, current, forecast]
- Extensive expert commentary on prices, margins, trade, market conditions, operational issues and future trends impacting markets
- Quarterly supply/demand balances and trade flows

### Inquiry & Consulting Privileges

Subscribers receive reasonable access to Chemical experienced industry professionals for market advice related to the service's respective product coverage.

### Market Advisory Services

Chemical Market Advisory Services offer monthly and weekly services. For products that are more actively traded, we have daily services. Together, they cover five basic chemical families.



# World Analysis

World Analysis provides long-term chemical market trends, supports strategic planning, business reviews by adding robust operations support, with current actionable data and expert analysis

Features	Time Horizon	Format	Emphasis	Buyer Benefits	Producer & Seller Benefits	Financial Client Benefits
Capacity Additions & Closures by Producer & Location	1990-2031	Excel spreadsheet	Secondary	Supply Opportunity	Threat Assessment	Threat Assessment
Capacity by Producer & Locations	2017-2050	Excel spreadsheet	Primary	Alternate Source Opportunity, Supplier Selection	SWOT Analysis	Supply / Demand Analysis
Demand by Country & Region	2017-2050	Excel spreadsheet	Primary		Sales Strategy, Market Share Assessment	Revenue Projections
Demand by Market Segment for Each Country	2005-2050	Excel spreadsheet	Primary		Marketing Strategy, Resource Planning	Revenue Projections, SWOT Analysis
Imports & Exports by Country & Region	2005-2050	Excel spreadsheet	Secondary	Strategic Supply Planning	Competitive Planning	Threat Assessment
Online dashboard providing visualization of capacity, supply/ demand and trade forecasts		Online	Primary	Personalized Analysis	Personalized Analysis	Personalized Analysis
Operating Rates by Country	2005-2050	Excel spreadsheet	Primary	Price Negotiation Leverage Assessment, Price Leverage Inflections	Price Negotiation Leverage Assessment, Price Leverage Inflections	Margin Assessment
Supply by Country & Region	2005-2050	Excel spreadsheet	Secondary	Anticipate Shortages & Abundance		
Supply-Demand Balance	2005-2050	Excel spreadsheet	Primary	Pricing Leverage Assessment	CAPEX Decisions	Margin & Cash Flow Projections
Tools for Online Data Drilldown	Data Drilldown	Online	Primary	Data Visualization by Personalized Criteria	Data Visualization by Personalized Criteria	Data Visualization by Personalized Criteria
Explanatory Notes detailing data sources, methodologies, unit and conversion factors, and World Analysis deliverables						

## Product Features



### Capacity Database

- **Frequency:** updated daily
- **Time Frame:** 10-year forecasts [available from periods 1990-2033]
- **Nameplate capacity** on individual plant locations by producer and by shareholder for main study products
- **Top producer** and consumer ranking tables [includes net surplus/deficit]



### Trade Grids

- **Frequency:** Bi-annual
- **Timeframe:** 1 year of history, up to 10 years of forecast
- Between partner countries and by region



### Additional Features

- Access to our global team of subject matter experts
- Interactive data visualization module [dashboard]
- Standard supply/demand graphs



### Price & Cost Forecasts

- **Frequency:** quarterly
- **Timeframe:** up to 2050
- **Forecasts** for the US, Europe and Asia with qualitative sensitivities



### Supply/Demand Balances

- **Frequency:** Bi-annual
- **Timeframe:** 2005 - 2050
- **By country/region:** include "hypothetical" capacity changes in the forecast period



### Report With Strategic Insights and Executive Overview

- **Frequency:** Annual
- **Timeframe:** 5-year history, forecast to 2050
- **Regional market summaries:** Production economics/ snapshots for selected regions/ processes. Production process/ technology overview

## Benefits

- Maximize negotiating leverage with forward-looking country-specific supply-demand data.
- Develop a winning strategy based on growth projections of market segments worldwide.
- Gain clarity evaluating investment opportunities and analyzing market leadership out to 2050.
- Mitigate risk with data about emerging international trade flows.

# Plastics and Polymers Strategic Insights



Environmental considerations create uncertainty for the supply/demand balances.

China: recycled plastic import ban versus Southeast Asia recycle development; West Europe: Circular Economics & single use packaging.



Polyolefins demand growth outpacing GDP growth.

End use demand drivers increase with economic growth, e-commerce & greater affluence.



Price setting mechanisms operate within changing floor and ceiling boundaries.

Inter-material substitution costs, import/export affordability, product performance, and new applications change price boundaries.



Upcycle integrated margins remained healthy through 2020.

Supply/Demand balances controlled by ethylene and propylene availability.



Regional feedstock competitiveness, CAPEX differentials & demand influence location of supply.

Regional cost competitiveness and trade flows affected by demand centers as well as low cost supply locations.



Disruptive technologies for ethylene and propylene have potential to change competitive landscape.

Polypropylene price dynamics change as by- and co-product production loses influence and technologies emerge for more direct gas to polyolefins production



Large populations consume significantly less plastic per capita compared to fully developed regions.

At what pace and degree will developing economies grow to levels of North America and West Europe?

# How can this service help you

Strategic Planning	Purchasing	Selling & Marketing	Business Management	Financial Analysis	Engineering and R&D
Deliver a credible business strategy	Source chemical raw materials	Identify the right selling opportunities	Determine realistic targets and budgets	Complete accurate and timely competitor analysis	Benchmark chemical process competitiveness
Validate investment plans	Negotiate effective supply contracts	Negotiate more profitable contracts	Identify growth opportunities	Evaluate success of projects & business units	Select process technology for new plants
Identify market opportunities and risks	Optimize supplier portfolio	Optimize your customer and product portfolio	Optimize pricing strategies	Provide confident evaluations of future investments	Diminish the risk of your capital investment plans
Access the competitive landscape	Make informed buying decisions	Cultivate better customer relationships	Build value-based commercial strategies	Understand the best method to deploy capital	Estimate capital costs



# Meet the Plastics & Polymers Global Team



**Nick Vafiadis**  
Global Plastics &  
Polymers Team Lead



**Joel Morales**  
Global Plastics &  
Polymers  
North America  
Polyethylene  
North America  
Polypropylene



**Anthony Palmer**  
Global Circular Plastics  
Sustainability



**Brendon Dooley**  
Global Engineering  
Plastics



**Martin Wieswag**  
EMEA Plastics



**Robin Waters**  
Global Circular Plastics  
Sustainability



**Stefano Caporusso**  
EMEA Engineering  
Plastics



**Kaushik Mitra**  
Europe Plastics &  
Polymers



**Jonny Goyal**  
Circular Plastics  
Sustainability



**Daniel Siow**  
Southeast Asia  
Styrenics & ABS



**Fabrizio Galie**  
EMEA Polyolefins



**Utpal Sheth**  
Asia Plastics &  
Polymer



**Preeti Sriram**  
North America Nylon,  
PBT, POM



**Yi Ling Tan**  
Southeast Asia  
Polyolefins



**Hongyan Xu**  
Asia Engineering  
Plastics



**Terine Ooi**  
North America  
Polyolefins



**Leonardo Mancilla**  
Latin America  
Polyolefins



**Alan Wei**  
China Polyolefins  
(Mandarin)



**JP Nah**  
Southeast Asia  
Polyolefins



**Svetlana Panteleeva**  
European Polymer

## About Chemical Market Analytics by OPIS, a Dow Jones Company

Chemical Market Analytics by OPIS, a Dow Jones company, provides stakeholders in the global chemical industry with next-generation analytics, deep insights, future outlooks and price discovery to improve operational efficiency.

The company offers short- and long-term market coverage for more than 200 core building-block chemicals via Market Advisory Services (MAS), World Analysis (WA), Circular Plastics Service, Chemical Advisory Service and educational and networking conferences such as World Chemical Forum.

### CUSTOMER SERVICE

Phone: +1 301.966.7270 or  
+1 888.301.2645 [toll-free within the U.S.]

### EMAIL

[support@chemicalmarketanalytics.com](mailto:support@chemicalmarketanalytics.com)



# Chemical Market Analytics Events



## World Chemical Forum

PRESENTED BY  
CHEMICAL MARKET ANALYTICS  
BY OPIS, A DOW JONES COMPANY

THE WALL STREET JOURNAL.

BARRON'S

September 12-14, 2023  
Marriott Marquis  
Houston, TX, USA

[worldchemicalforum.com](https://worldchemicalforum.com)



WORLD CHEMICAL FORUM  
Houston, TX, USA | 12 - 14 September 2023

WORLD METHANOL CONFERENCE  
Vienna, Austria | 25 - 26 September 2023

WORLD SODA ASH CONFERENCE  
Athens, Greece | 10 - 12 October 2023

Global Acrylonitrile Forum  
Singapore | 1 - 2 November 2023

### Event Enquiries

[E rebecca.lopez@chemicalmarketanalytics.com](mailto:rebecca.lopez@chemicalmarketanalytics.com)  
[E nicole.morris@chemicalmarketanalytics.com](mailto:nicole.morris@chemicalmarketanalytics.com)

### Partnership Opportunities

[E dcoates@opisnet.com](mailto:dcoates@opisnet.com)

Visit our event page



## About Chemical Market Analytics by OPIS, a Dow Jones Company

Chemical Market Analytics by OPIS, a Dow Jones company, provides stakeholders in the global chemical industry with next-generation analytics, deep insights, future outlooks and price discovery to improve operational efficiency.

The company offers short- and long-term market coverage for more than 200 core building-block chemicals via Market Advisory Services (MAS), World Analysis (WA), Circular Plastics Service, Chemical Advisory Service and educational and networking conferences such as World Chemical Forum.

### CUSTOMER SERVICE

Phone: +1 301.966.7270 or  
+1 888.301.2645 [toll-free within the U.S.]

### EMAIL

[support@chemicalmarketanalytics.com](mailto:support@chemicalmarketanalytics.com)