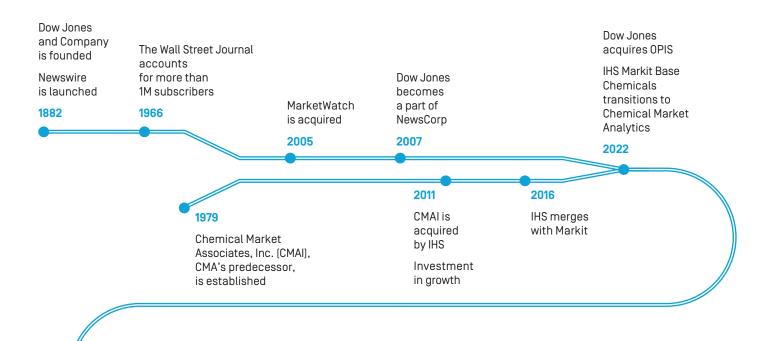
OPIS A DOW JONES COMPANY

CHEMICAL MARKET ANALYTICS

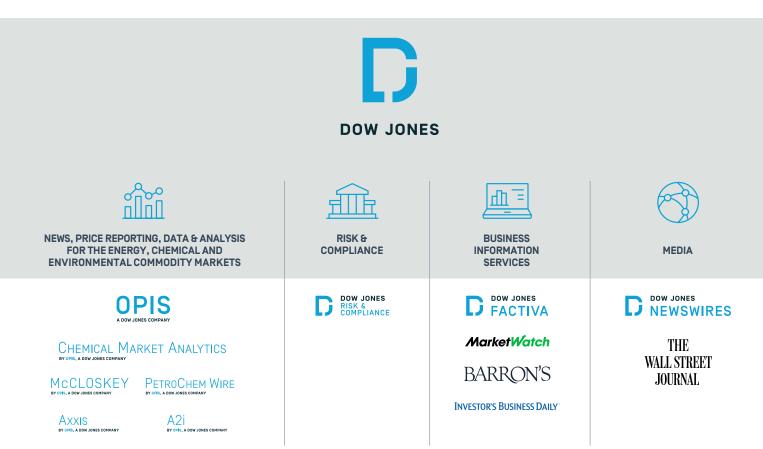
Short-term and long-term market coverage for over 200 core building block chemicals

UNMATCHED INDUSTRY LEGACY Foresight That Empowers Our Customers

For over 40 years, our experts have enabled thousands of clients to make transformative decisions through our integrated approach to data analytics and market foresight Chemical Market Analytics (CMA) brings almost 50 years of unparalleled industry legacy and expertise in our coverage and analysis of the chemical markets.



CMA is now part of Dow Jones's group of businesses and is able to leverage the wealth of data and expertise across the energy, commodity and financial markets.



Cost Curves: Revolutionize Your Chemical Market Strategy

Leverage your competitive edge with cost calculations for every facility in the world.

Cost Curves by Chemical Market Analytics enable you to visualize the production costs of individual plants and compare them to regional prices and demand, arming your business with a competitive view to strategically buy, sell, or negotiate in your product markets.

Based on trusted Chemical Market Analytics price assessments, market expertise, supply/demand and economic models, our Cost Curve platform gives you an independent and reliable source of production cost data.

Key use cases:

Asset valuation:

Validate your calculated cost curves with our independent data.

Benchmark production costs:

Compare your cost position to competitors. Pinpoint import/ export opportunities:

Discover the most competitive regions. Predict capacity impact:

Explore the influence of new capacity or technology.

Evaluate Integration:

Assess integrated feedstock or coproduct economics.

Actionable insights at your fingertips:



A visualization tool where you can view and download cost data for key chemicals including Ethylene, Polyethylene, Propylene, Polypropylene, Chlorine, Caustic Soda, Soda Ash, Methanol, Monoethylene Glycol, and Ethylene Oxide.



Forecast through 2050 and five years of historical data are included.



Includes global and regional cost curves for North America, South America, West Europe, Central Europe, CIS & Baltic States, Africa, Middle East, Indian Subcontinent, China (mainland), Other Northeast Asia, and Southeast Asia.



Quarterly data updates for price forecasts and biannual for supply/demand.



Delivered costs can be selected for delivery to USGC, ARA, and China.



Includes integrated costs for facilities with feedstock and coproduct integration.



Backed by deep industry expertise, our Cost Curves are built on decades of global experience only available from the Chemical

Market Analytics team.

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Request a FREE demo to experience the insights of Cost Curves by Chemical Market Analytics today!



Chemical Consulting Services

Chemical Market Analytics provide consulting services under 5 broad industry themes, elevating the decision-making process for our clients:

1

Transactions

Mergers & Acquisitions

- Pre- and post-deal support
- Buyside and sell-side due diligence

Commercial and Technical

- Operations and technology
- Markets and profitability

Project Finance

Lenders Consultant

Opportunity prospecting

• Defining acquisition targets



Investment Advisory

Business environment

- Market studies
- Pricing studies

Deep Dives

- Bespoke value chain assessment
- End use category development

Greenfield & Brownfield advisory

- New process units
- Refinery integration

Masterplans

5

• Corporate and national masterplan development



Circular Economy

Strategic input for corporates

-IDEAS

OLUTIONS

- Circular economy masterplans
- Achieving specified targets

Technology

- Review of existing
- Evaluation of new

Feasibility

- Feedstock strategy
- Commercial strategy

Value chains

- Specific polymer studies
- Substitution and acceptance

4

Carbon Emissions

Corporate strategy

- Business assessment and evaluation
- Supply chain analysis

Benchmarking

- Emissions benchmarking
- Achieving specified targets

Carbon Markets

 Feedstock and raw material supply

Low Carbon Fuels

- Blue/Green Ammonia
- Blue/Green Methanol
- SAF
- Biofuels

Scenario Development

Corporate Scenario development

- Increased crude to chemicals
- Energy transition impacts

Financial scenarios

- Commodity prices
- Financial policy

Economic uncertainty

- Economic growth scenarios
- Trade uncertainty
- Geopolitical events





Our delivered consulting projects have added crucial value for our clients globally, with recent examples including:

Butadiene/C4s Business Due Diligence for North American producer

The client required support in evaluating the long-term viability of the crude C4/ butadiene value chain and assessing the competitive landscape and potential acquisition opportunities in the market.

Petrochemicals Strategy Development for US producer

CMA supported the client in exploring expansion options for its petrochemical portfolio by assessing opportunities within its current portfolio, screening new petrochemical derivatives for investment and deriving potential routes for the selected derivatives.

Aromatics Investment Assessment for US refinery

CMA supported the client in evaluating an investment into aromatics production integrated with its refining facilities, considering aromatics market outlook and potential refinery rationalization due to the impact of energy transition.

Capacity Rationalization Analysis for global chemicals producer

CMA provided detailed analyses of potential capacity rationalization in the olefins and polyolefins market in view of global oversupply to restore higher operating rates, supporting discussions during the client's board meetings.

European Transaction Support for global chemicals producer

CMA acted as the independent market advisor for the client exploring potential divestment of its olefin and polymer assets in West Europe.

PVC Strategic Assessment for chemicals producer

CMA supported the client in evaluating opportunities to improve profitability and feedstock flexibility in the PVC value chain, covering short-term feedstock purchasing dynamics and longer term infrastructure investments.



CMA provided an independent view of the long-term market dynamics and pricing of pyrolysis oil including scenario analysis to support the financing of the client's chemical recycling project.

Chemical Derivatives Screening Assessment for Middle East producer

CMA delivered a comprehensive screening study on a long-list of petrochemical derivatives to support the client in developing its portfolio and progressing its petrochemical strategy.

Lenders Market Consultant for Soda Ash Facility for Asian producer

CMA acted as Lenders Market Consultant to support the financing of a greenfield soda ash facility in South Asia, covering market dynamics, pricing and profitability and competitiveness of the soda ash market.

Energy & Feedstocks

Gain unrivaled market intelligence with the new Energy & Feedstocks Service. This groundbreaking report consolidates all the essential feedstock analysis you need, crafted by **Chemical Market Analytics by OPIS** in partnership with **Rystad Energy**.

Our tailored service seamlessly integrates with our new Energy Macro Service, offering an unrivaled view from upstream oil and refining to LPG trading and downstream chemicals.

<figure>

A Holistic View of Market Forces

Gone are the days of fragmented data and siloed insights. Our service delivers a unified, integrated perspective, streamlining all the factors shaping NGL and naphtha markets.

You'll benefit from:

WEEKLY MARKET UPDATES

Stay informed with curated headlines, outage reports, key economic indicators, and forecasts for propane, butanes, and ethane, empowering timely action.

MONTHLY DEEP DIVES

Gain a deeper understanding with full fundamental assessments, regional inventory analyses, and strategic market evaluations for all components, equipping you for long-term success.

GLOBAL MARKET INTELLIGENCE

ROPANE / BUTANE

Track global trade dynamics, visualize trade flow maps, and assess arbitrage opportunities for confident trading decisions across regions.

Energy Macro Service

Weekly Market Pulse

 "Headlines & Highlights" of global oil and gas markets, accompanied by graphical analyses of weekly data releases

Monthly Deep Dives

- Gain insights into the essential market developments with a comprehensive overview
- Explore forecast highlights and the driving factors behind Brent, Henry Hub, and significant gasoline grades, with a focus on what has changed compared to the previous month and the underlying reasons.
- Receive a concise review of the supply and demand outlook for oil (global), gas, and gasoline in key regions such as NAM, WEP, and NEA, provided by Rystad Energy.
- Data access historical and forecast data for WTI,Brent, Dubai, Henry Hub, TTF, NBP, ZEEBRUGGE, NEA spot gas, JCC, as well as all gasoline grades.

NGL & Naphtha Intelligence

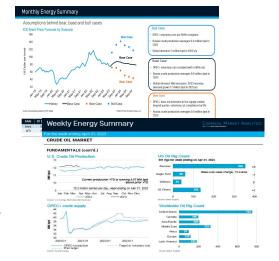
Weekly Market Pulse

- ✓ **STAY INFORMED**: Curated OPIS headlines keep you ahead of the curve, while timely PDH and cracker outage reports minimize operational disruptions.
- ✓ UNCOVER PRICE DRIVERS: Interactive economic indicators, price driver charts, and forecast changes reveal the forces shaping propane, butanes, and ethane movements.
- ✓ OPTIMIZE PROCUREMENT & TRADING: Futures and forecast analysis empower confident buying and selling decisions, capitalizing on market fluctuations.

Monthly Deep Dives

- ✓ FULL FUNDAMENTAL ASSESSMENTS: Gain a comprehensive understanding of propane, butanes, ethane, and naphtha, driving strategic procurement and trading decisions.
- REGIONAL INVENTORY ANALYSIS & FORECASTS: Foresee the future with in-depth analyses of supply dynamics and Asian demand trends for each component.
- ✓ US & MDE SUPPLY LANDSCAPE: Gain granular insights into US and MDE supply chain dynamics, informing strategic sourcing and transportation decisions.
- ✓ ROBUST PRICE FORECASTING: Confidently navigate future market movements and price negotiations with advanced analysis, including butane integration.

 Access regional weather forecast maps and keep track of global daily road traffic volumes from Rystad Energy



- ✓ MONITOR SUPPLY & TRADE: Track inventory and export data for propane, butanes, and ethane through insightful charts, optimizing logistics and regional opportunities.
- ✓ MASTER ETHANE TRADE: Dedicated export economics charts, cracker outage reports, and price driver analysis enable informed ethane trading strategies and maximum margins.
- ✓ UNLOCK NGL & NAPHTHA POTENTIAL: Analyze trade flows, arbitrage potential, and crack spreads for profitable trading across the value chain.
- CHART YOUR COURSE: Identify key month-over-month changes (demand drivers, outages) and their underlying drivers, enabling proactive risk mitigation and profit maximization.
- HARNESS GLOBAL TRADE: Analyze aggregated global trade data and detailed trade flow maps by component, uncovering global arbitrage opportunities and optimizing logistics.
- ✓ GLOBAL SUPPLY & DEMAND PANORAMA: Gain a comprehensive understanding with regional breakdowns focusing on North America, the Middle East, and Asia, ensuring strategic market positioning.
- PRICE TRANSPARENCY: Stay informed with comprehensive global prices and differentials for each feedstock, securing optimal margins in every transaction.

The Ethane Edge: Intelligence that Powers What's New

Why Global Ethane Outlook?

Exclusive Ethane Focus

The only subscription service dedicated entirely to global ethane markets. Get in-depth data and analysis that help you stay ahead—rather than scramble to catch up.

Proprietary Pricing Indices

Access exclusive monthly indices and forecasts for waterborne ethane trade—giving you unmatched visibility into evolving price trends before the rest of the market reacts.

Long-Term Foresight

Make confident strategic decisions with supply, demand, and pricing forecasts through 2050—crafted to support planning, investment, and long-range scenarios.

Flexible Delivery Option

Receive insights the way you need them: weekly and monthly reports, dynamic web tools, and downloadable Excel data for integration and modeling.

Product Features

Infrastructure Coverage:

Pipelines, fractionators, terminals

Short Term Forecasts [24-36 Months]:

- Supply and demand (regional & country-level)
- Monthly price history and forecasts for:
 Mont Belvieu, Edmonton, Conway, Mexico,
 Brazil, Northwest Europe, China, India

CHEMICAL

NALYTICS

Long-Term Forecasts (through 2050):

- Annualized supply and demand (regional & country-level)
- Monthly price history and forecasts for the same key locations

Reporting Cadence:



earn More

Market Advisory Service – Global Recycled Plastics

The plastics recycling market is rapidly evolving and market participants need a tool to discover prices and understand price projections, with accompanying insight to manage the tactical aspects of transitioning to a circular economy for plastics. The Global Recycled Plastics service is an essential resource for addressing the transactional needs of business management, procurement functions, and the financial community that supports the recycling and plastics sectors.

Chemical Coverage:

- Recycled Polyethylene Terephthalate (R-PET)
- Recycled Polyethylene (R-PE): High Density (R-HDPE); Linear Low Density (R-LLDPE); and Low Density (R-LDPE)
- Recycled Polypropylene (R-PP)
- ✓ Available in Bales, Flakes, and Pellets

Market Coverage:

- United States (US)
- ✔ Western Europe
- 🖌 Mainland China

(Available later in 2025)

Key Features and Insights

The Global Recycled Plastics service is a monthly market report including current and projected prices, detailed market commentary, and expert analysis. Subscribers also have access to a price database and global directories of mechanical and chemical recyclers, supported by direct access to a dedicated team of industry experts.

Market prices

- Monthly forecast for the current calendar and subsequenttwo calendar years
- Timely reporting of discovered market prices

Supply

- Capacity additions and implications
- Collection trends
- Reliance on imports

Demand

- Consumption
- Seasonality impact

Circular plastics activities for key suppliers of recycled plastics

Online recycler directories

- Chemical
- Mechanical

Insights

- Alliances, joint ventures, acquisitions
- Commitments and investments
- Evolving industry infrastructure
- Plastics waste trend
- Policies and regulations

Ongoing support

- Access to discussions with Chemical Market Analytics' experts
- Periodic webinars

Circular Plastics Service Content Categories

The service content is organized into eight categories containing a mix of databases, models, analytics, and insights.

Essential Building Blocks for a Circular Strategy

Understanding Reverse Supply & Demand

> Economic Tools for Actionable Strategies



REGULATIONS & POLICIES

- Key global and regional regulations, mandates & policies that drive scenario assumptions
- Insight for key regulatory trends including extended producer responsibility, deposit return schemes, product and material bans, taxes and minimum recycle content
- Implications and unintended consequences of regulatory actions

TECHNOLOGIES & LICENSORS

- Technology scanning for mechanical, dissolution, depolymerization, pyrolysis & gasification processes
- Technology company screening, profiles
 and benchmarking
- Technoeconomic evaluations of recycling processes

RECYCLING ASSETS & CAPACITIES

- Global databases for mechanical and chemical recycling assets
- Detailed analyses of key variables including TRL, partnerships, scalability and input/output flexibility
- Projection of advanced recycling capacity installations

SEGMENTED POLYMER DEMAND

- Scenario-based segment demand modeling, insight, and visualization
- Fossil-, renewable-, chemical- & mechanical-based demand breakouts
- Granular segmentation that explores the competition between PCR, biobased and virgin plastics

CIRCULAR SUPPLY CHAIN MODELING

- Scenario modeling, analytics & insight for recycle supply via waste generation and disposition
- Characterization of plastics waste by recyclate form & alignment with segmented polymer demand
- Infrastructure for disposition of plastics waste via mechanical, dissolution & chemical recycling, landfill and incineration

SUPPLY / DEMAND IMPLICATIONS

- Demand Impact on fossil-based PE and PP production.
- Material balance modeling and implications of allocation methods.
- Demand impact on polymers' feedstocks.

ASSET ECONOMICS & EMISSIONS

- Scenario-based modeling and insight to evaluate the economics and emissions for circular plastics production compared to the incumbent, fossil-based linear model for producing plastics
- Capital spending and capacity addition for mechanical & chemical recycling
- Scope 1 & 2 emissions for mechanical & chemical recycling processes compared to fossil-based polymer

PRICE, MARGIN & ROI

- Annual projections for US, West Europe and China for:
 - o Polyolefins
 - -Bales: HDPE (clear, mixed color), PP & mixed waste plastics -PCR: HDPE (clear, mixed color), PP -HDPE & PP from pyrolysis naphtha
 - -Bio-based polyolefins
 - o PET
 - -Bales
 - -PCR from mechanical recycling: clear flakes, colored flakes & food grade pellets
 - -From 100% chemical recycling

Market Advisory Services

Provides Data-Based Analytics and Price Assessments

MAS provides accurate **current and near-term market data and analysis f**or five basic chemical families. The service is distributed daily, weekly, bi-weekly, or monthly through reports and/or data supplements

Chemical Market Advisory Services include:

Olefins & Derivatives

- Asia C4 Olefins & Elastomers
- Asia Light Olefins
- Europe/Middle East Light Olefins
- Global Acrylates & SAP
- Global Acrylonitrile & Derivatives
- Global C4 Olefins & Elastomers
- Global Oxo Alcohols &
 Plasticizers
- Global Tire Raw Material Indices
- North America Light Olefins

Methanol & Others

- Global Acetyls
- Global Methanol

Aromatics & Fibers

- Asia Aromatics
- Europe Aromatics
- Global Acetone
- Global Ethylene Oxide, Glycol & Derivatives
- Global Nylon Fibers & Feedstocks
- Global PET Stream
- Global Polyurethane Feedstocks
- Global Polyester Fibers & Feedstocks
- North America Aromatics

Chlor-Alkali & Vinyls

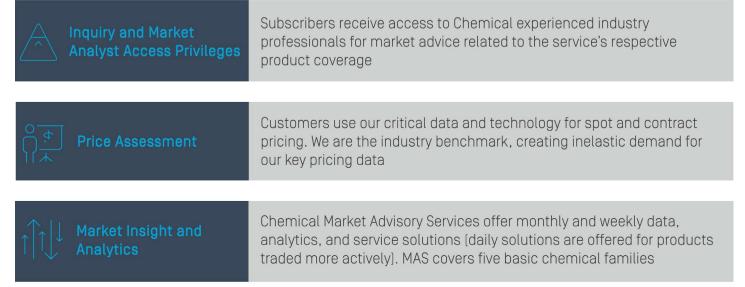
- Global Bleaching Chemicals
- Global Chlor-Alkali
- Global Soda Ash
- Global Vinyls

Plastics & Polymers

- Asia Polyethylene
- Asia Polypropylene
- Asia, Middle East & India Plastics & Polymers
- China Polyolefin (Mandarin)
- Europe Plastics & Polymers
- Global Engineering Resins
- Global Plastics & Polymers
- North America Polyethylene
- North America Polypropylene
- Circular Plastics Service



Learn More



World Analysis

Designed to Empower Users with Actionable Data.

Service Coverage



World Analysis spans five major value chains and is expanded and updated regularly

Olefins & Derivatives

- Acrylates & SAP
- Acrylonitrile
- Butadiene
- Butylenes •
- Ethylene Oxide& Ethylene Glycol
- Ethylene
- Nitrile Latex NEW
- **Oxo Alcohols**
- Propylene
- Propylene Oxide •
- Rubber
- Methyl Methacrylate (MMA) NEW

Aromatics & Fibres

- Benzene
- Cumene, Phenol & Acetone
- Nylon Feedstocks
- Nylon Fibers .
- Paraxylene
- Polyester •
- Polyether Polyols NEW
- PTA/DMT&Isophthalic Acid •
- Pygas NEW
- Styrene •
- Toluene & Mixed Xylenes
- MDI
- TDI

Plastics & Polymers

- ABS Resins
- Expandable Polystyrene (EPS)
- Nylon Engineering Resins
- Polyacetal (POM Polymers) NEW
- Polybutylene Terephthalate (PBT) NEW
- Polycarbonate
- Polyethylene
- Polypropylene
- Polystyrene

Syngas Chemicals

- Acetyls
- Formaldehyde & Resins
- Methanol
- MTBE
- Ammonia & Urea NEW

Inorganics

- Chlor-Alkali
- Soda Ash
- Vinyls
- Sodium Sulfate NEW



Learn More

Chemical Market Analytics Events

Global Plastics Summit Houston, Texas | 25 – 27 February 2025

Global Chlor-Alkali & Vinyls Conference Hilton Barcelona, Spain | 15 - 16 May 2025

World Soda Ash Conference Palma de Mallorca, Spain | 7 – 9 October 2025

Event Enquiries

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Partnership Opportunities

E dcoates@opisnet.com



CHEMICAL Market Analytics



Visit our event page



SAVE THE DATE World Chemical Forum March 25-26, 2026 · The Woodlands, TX

