

Canada Emerges as a Major LPG Player: A Game-Changer for Downstream Petrochemical Markets



Canadian LPG is Shifting the North American Export Landscape

While the US remains a dominant producer, Canada's rapid rise in LPG production and strategic exports are creating significant opportunities for downstream petrochemical markets.

North America LPG Supply



Source: Chemical Market Analytics by OPIS

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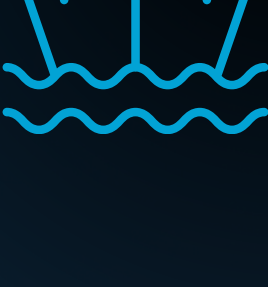
Reliable and Growing Feedstock Source

Canada's booming LPG production offers a stable and secure supply of raw materials for downstream petrochemical processes.



Enhanced Market Diversification

The diversification of Canada's LPG exports opens new doors for downstream players. Access to competitive feedstock from Canada can be a strategic advantage.

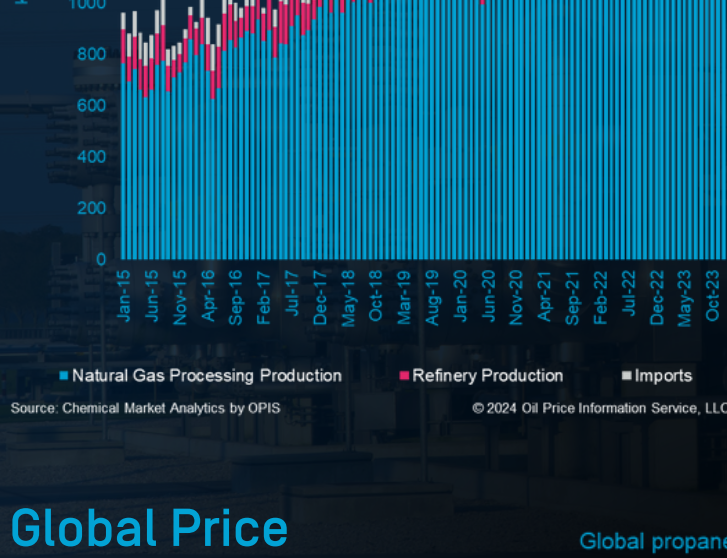


Shorter Delivery Routes

Canadian exports reaching Asia and Latin America present shorter transportation times compared to traditional supply sources, potentially reducing costs and emissions.

Canada's LPG Advantage

Canada LPG Supply



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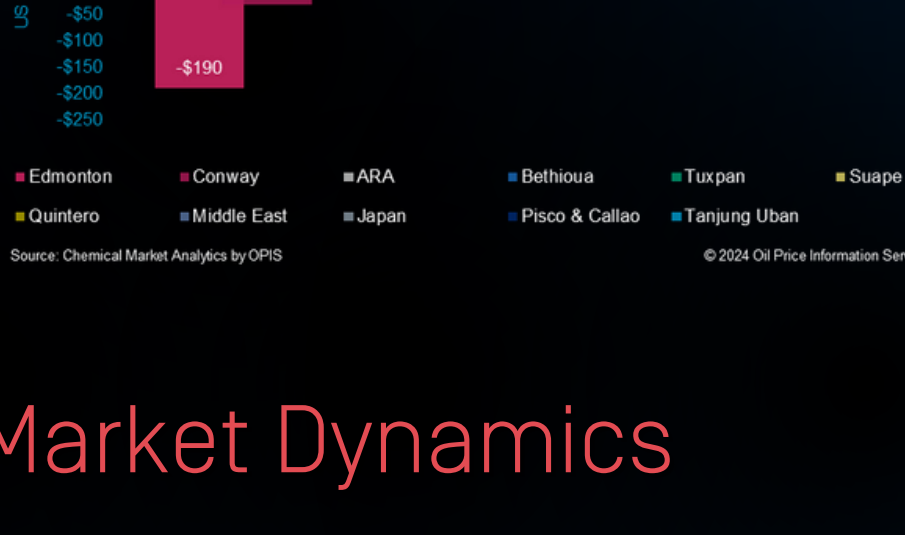
Unique Production Mix

Canada's LPG production primarily comes from natural gas processing, offering a cleaner and more consistent feedstock compared to US shale-based production.

Global Price Competitiveness

Canadian LPG often trades at a discount compared to benchmark prices (e.g., Mont Belvieu).

Global propane prices differentials to Mont Belvieu



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Shifting Market Dynamics

Canada LPG Supply

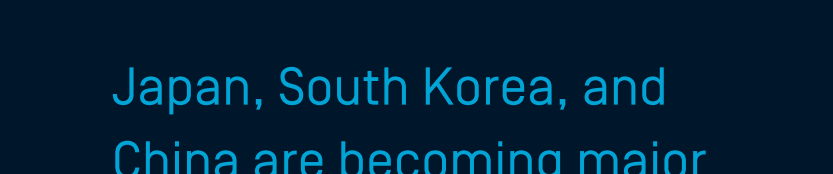


Source: Chemical Market Analytics by OPIS

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Canada's domestic LPG consumption remains steady, while exports are on the rise. This creates a reliable source of feedstock for downstream markets.

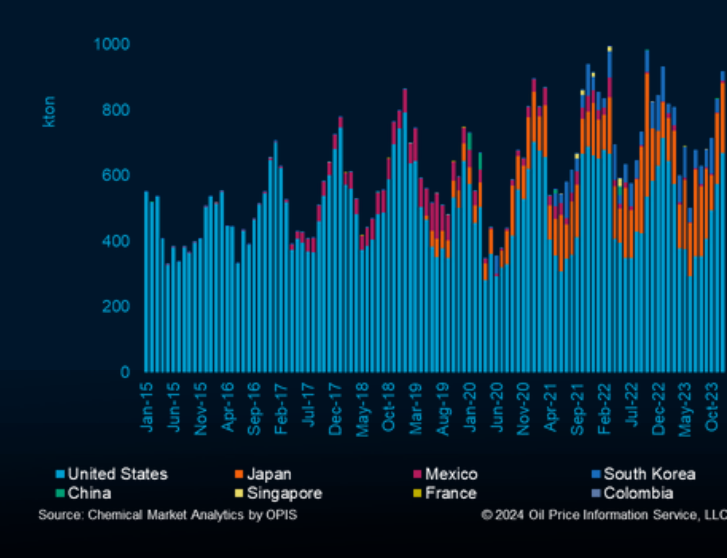
New export channels like marine terminals on the Pacific Coast are delivering Canadian LPG to key global markets in Asia and Latin America.



As of November, 2023

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Canada LPG exports by destination



Source: Chemical Market Analytics by OPIS

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Japan, South Korea, and China are becoming major recipients of Canadian LPG exports. Canadian cargoes have reached as far as Singapore, France, and Colombia.



The Rise of Canadian LPG Presents a Win-Win Opportunity for Petrochemicals

Reliable supply, competitive pricing, and shorter delivery routes all contribute to increased efficiency and profitability for downstream players.

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