

CHEMICAL MARKET ANALYTICS

BY OPIS, A DOW JONES COMPANY

Olefins & Derivatives

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

Near term outlook – Market analysis

Asia C4 olefins & elastomers	Global C4 olefins & elastomers
Asia light olefins	Global Oxo Chemicals
Europe/Middle East light olefins	Global tire raw material indices
Global acrylates & SAP	North America light olefins
Global acrylonitrile & derivatives	

- 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

Acrylic acid & acrylates	MTBE
Acrylonitrile Butadiene	Oxo alcohols
Butylenes	Propylene
Ethylene	Rubber

- 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



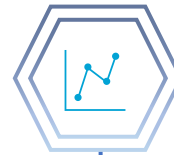
Features	Time Horizon	Format	Emphasis	Buyer Benefits	Producer & Seller Benefits	Financial Client Benefits
Capacity Additions & Closures by Producer & Location	1990-2031	Excel spreadsheet	Secondary	Supply Opportunity	Threat Assessment	Threat Assessment
Capacity by Producer & Locations	2017-2050	Excel 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)



Price & Cost Forecasts

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



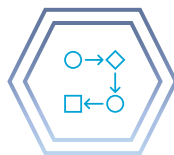
Trade Grids

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



Supply/Demand Balances

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



Additional Features

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



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.

Olefins and Derivatives Strategic Insights



Plastics Circularity

Chemical recycling challenged by high carbon footprint of producing pyrolytic oils and naphtha from plastics, low carbon power will be needed to make this process environmentally credible.



EU Green Deal and Fit for 55

EU redoubling efforts to use carbon pricing as a key tool to lower emissions and drive decarbonization. Many players in the petrochemical industry are launching investments and developing technologies to address this change.



Mainland China's action plan for peaking carbon emissions by 2030

Short-term impact of dual control policy targets for energy consumption by province resulting in plant outages, longer term plans include rationalization of inefficient CDUs and steam crackers.



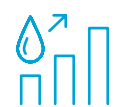
Crude Oil-to-Chemicals (COTC)

Increasing the degree of conversion of a refined oil barrel to chemicals to produce higher yields of propylene, aromatics and other feedstocks, ultimately elevating petrochemical production to refinery scale.



Cracker Feedslates

The ongoing shift to lighter feedslates in steam crackers reduces the output of coproducts (CC4, propylene, aromatics) and supports investments in on-purpose production capacities.



Gasoline Demand and Mobility

Refinery operations and chemical feedstock production linked to gasoline demand with future growth driven by changing fuel-efficiency standards, increases in autonomous transportation, the electrification of vehicles, and competition from other transportation fuels.



Cost Competitiveness

Regional cost competitiveness and global trade flows affected by the location of demand centers as well as low-cost producers with access to advantaged feedstock pricing.



Changing trade flows

The drive to more self-sufficiency combined with the impact of supply chain disruptions and trade wars is resulting in more production capacities to be built near demand centers, which is diverting trade flows and ultimately lowering the total traded volumes.

How can this service help you



Chemical Market Analytics Events

Global Chlor-Alkali & Vinyls Conference 2024
Lisbon, Portugal | 7-8 May 2024

32nd Annual Polyethylene and Polypropylene (PEPP) Conference
Amsterdam, Netherlands | 17 - 18 June 2024

World Chemical Forum
Houston, Texas | 9 - 11 September 2024

World Soda Ash Conference
Malta | 9 - 11 October 2024

World Methanol Conference Copenhagen,
Denmark | 22 - 24 October 2024

Global Acrylonitrile & C4s Forum
Singapore | 14 - 15 November 2024

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

Event Enquiries

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Partnership Opportunities

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About Chemical Market Analytics by OPIS, a Dow Jones Company

The esteemed team of trusted subject-matter experts at Chemical Market Analytics by OPIS, a Dow Jones company, delivers next-generation analytics, in-depth insights, future outlooks, and price discovery to stakeholders in the global chemical industry, enhancing operational efficiency. We provide both short- and long-term market coverage through our Bespoke Consulting services.

Energy and Feedstocks analysis, and coverage of over 200 core building-block chemicals via our Market Advisory Service, Chemical Advisory Service, World Analysis Service, Circular Plastics Service. Additionally, we host a series of educational and networking conferences worldwide, including the World Chemical Forum.

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