ASIA POLYMERS – New global capacities to change the game

26 April 2018

Felita Widjaja, Leanne Tan, Markets Editor (PE, PP)
Muhamad Fadhil, Head of Middle East Markets
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Get an end-to-end perspective across the global polyolefins supply chain, enabling you to grasp the local or regional scenario in a global context. The data includes import and export volumes, consumption, plant capacities, production and product trade flows – from 1978 up to 2040.
Agenda

Overview on global capacity waves

Current market dynamics and evolving trade flows

The future of the polymers industry in Asia

Changing market environment in the Middle East
Overview on global capacity waves
Shale resources fueled unprecedented investments

- Concentrated crackers and PE plants startups in 2017
- Major producers at the forefront of North American expansion
- Delay in cracker startups affect PE production

Source: ICIS
North America’s PE capacity expansion

<table>
<thead>
<tr>
<th>Company</th>
<th>Capacity (kt/year)</th>
<th>Grade, breakdown</th>
<th>Location</th>
<th>Start-Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dow Chemical</td>
<td>400</td>
<td>ELITE PE</td>
<td>Freeport, Texas</td>
<td>Q3 2017</td>
</tr>
<tr>
<td>Dow Chemical</td>
<td>350</td>
<td>LDPE</td>
<td>Plaquemine, Louisana</td>
<td>Q4 2017</td>
</tr>
<tr>
<td>Chevron Phillips Chemical</td>
<td>1,000</td>
<td>Bimodal HDPE (500), mLLDPE (500)</td>
<td>Old Ocean, Texas</td>
<td>Q3 2017</td>
</tr>
<tr>
<td>ExxonMobil Chemical</td>
<td>1,300</td>
<td>mLLDPE plus LLDPE (2 x 650)</td>
<td>Mont Belvieu, Texas</td>
<td>End 2017</td>
</tr>
<tr>
<td>INEOS/Sasol</td>
<td>470</td>
<td>HDPE</td>
<td>La Porte, Texas</td>
<td>Q4 2017</td>
</tr>
<tr>
<td>Formosa Plastics</td>
<td>800</td>
<td>HDPE (400), LDPE (400)</td>
<td>Point Comfort, Texas</td>
<td>H2 2018</td>
</tr>
<tr>
<td>Dow Chemical</td>
<td>125</td>
<td>Bimodal HDPE/MDPE</td>
<td>Seadrift, Texas; St Charles, Louisiana</td>
<td>2018</td>
</tr>
<tr>
<td>Sasol</td>
<td>890</td>
<td>LLDPE (470), LDPE (420)</td>
<td>Lake Charles, Louisiana</td>
<td>H2 2018 (LLDPE), 2019 (LDPE)</td>
</tr>
<tr>
<td>LyondellBasell</td>
<td>500</td>
<td>HDPE</td>
<td>La Porte, Texas</td>
<td>Mid-2019</td>
</tr>
<tr>
<td>ExxonMobil Chemical*</td>
<td>650</td>
<td>PE (unspecified)</td>
<td>Beaumont, Texas</td>
<td>2019</td>
</tr>
<tr>
<td>Total/Borealis/NOVA*</td>
<td>625</td>
<td>Borstar PE</td>
<td>Bayport, Texas</td>
<td>End 2020</td>
</tr>
<tr>
<td>Shell</td>
<td>1,600</td>
<td>HDPE/LLDPE (2x 550), HDPE (500)</td>
<td>Monaca, Pennsylvania</td>
<td>Early 2020s</td>
</tr>
<tr>
<td>PTT Global Chemicals*</td>
<td>700</td>
<td>HDPE (2x 350)</td>
<td>Belmont County, Ohio</td>
<td>2021 (FID Q4 2017)</td>
</tr>
<tr>
<td>NOVA Chemicals*</td>
<td>430</td>
<td>LLDPE</td>
<td>Sarnia, Canada</td>
<td>Late 2021</td>
</tr>
<tr>
<td>SABIC/ExxonMobil*</td>
<td>NA</td>
<td>PE unspec (2 units)</td>
<td>Corpus Christi, Texas</td>
<td>NA</td>
</tr>
<tr>
<td>Dow Chemical*</td>
<td>600</td>
<td>PE (unspec)</td>
<td>US Gulf Coast</td>
<td>2020s</td>
</tr>
<tr>
<td>Dow Chemical*</td>
<td>350</td>
<td>PE (unspec)</td>
<td>Various debottlenecks</td>
<td>2020s</td>
</tr>
</tbody>
</table>

**Source:** ICIS

- Total 2017 expansions = 3.5m tonnes/year
- Through 2019 = 6.5m tonnes/year (+42% US capacity)

*No FID yet

**Assuming 1,300kt PE for SABIC/ExxonMobil, start-up by 2022
China’s new PE capacities

<table>
<thead>
<tr>
<th>Company, Location</th>
<th>PE Capacity (kt/year)</th>
<th>Start-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shenhua Ningxia, Ningxia</td>
<td>CTO HDPE/LLDPE: 450</td>
<td>November 2017</td>
</tr>
<tr>
<td>CNOOC phase II, Guangdong</td>
<td>HDPE/LLDPE: 700</td>
<td>March 2018</td>
</tr>
<tr>
<td>Zhong’an Lianhe Coal Chemical, Anhui</td>
<td>CTO HDPE/LLDPE: 350</td>
<td>2018</td>
</tr>
<tr>
<td>Yanchang Yan’an Energy and Petrochemical, Shaanxi</td>
<td>CTO HDPE/LLDPE: 450</td>
<td>July 2018</td>
</tr>
<tr>
<td>Ningxia Baofeng Energy, Ningxia</td>
<td>HDPE/LLDPE: 300</td>
<td>End 2018</td>
</tr>
<tr>
<td>Shaanxi Coking, Shanxi</td>
<td>CTO: HDPE/LLDPE: 300</td>
<td>2019</td>
</tr>
<tr>
<td>Zhejiang Petrochemical, Zhejiang</td>
<td>HDPE: 450, HDPE/LLDPE: 300</td>
<td>2019</td>
</tr>
</tbody>
</table>

Source: ICIS

- PE expansion includes CTO and traditional naphtha to ethylene derivative plants
- 1.8m tonnes additional capacity expected in 2018
- China’s PE deficit still outstrips the additional capacities planned
- Many projects delayed to after 2020
Southeast Asia’s new PE capacities

<table>
<thead>
<tr>
<th>Company</th>
<th>Location</th>
<th>Country</th>
<th>Capacity ('000 tonnes/year)</th>
<th>Start-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>PTTGC</td>
<td>Map Ta Phut</td>
<td>Thailand</td>
<td>400 LLDPE</td>
<td>End 2017</td>
</tr>
<tr>
<td>PETRONAS Chemicals Group</td>
<td>Johor</td>
<td>Malaysia</td>
<td>400 HDPE, 350 C6 MLLDPE</td>
<td>H1 2019</td>
</tr>
<tr>
<td>Chandra Asri</td>
<td>Cilegon</td>
<td>Indonesia</td>
<td>400 LLDPE/MLLDPE/HDPE</td>
<td>Early 2020</td>
</tr>
<tr>
<td>JG Summit</td>
<td>Batangas</td>
<td>The Philippines</td>
<td>250 HDPE</td>
<td>2020</td>
</tr>
<tr>
<td>Long Son Petrochemicals</td>
<td>Ba Ria-Vung Tau</td>
<td>Vietnam</td>
<td>525 LLDPE, 525 HDPE</td>
<td>H1 2022</td>
</tr>
<tr>
<td>Lotte Titan Nusantara</td>
<td>Near Cilegon</td>
<td>Indonesia</td>
<td>Up to 600 PE</td>
<td>2023</td>
</tr>
</tbody>
</table>

- No new plant slated to start up in 2018
- Around 1.4m tonnes additional capacities by 2020
- Vietnam to have local PE production in 2022

Source: ICIS
### China’s new PP capacities – 2018

**2017 Realised supply: 1.89m tonnes**

**2017 Planned supply: 2.9m tonnes**

<table>
<thead>
<tr>
<th>Producer</th>
<th>Province</th>
<th>Capacity ('000 tonnes/year)</th>
<th>Upstream</th>
<th>Start up</th>
</tr>
</thead>
<tbody>
<tr>
<td>CNOOC Huizhou</td>
<td>Guangdong</td>
<td>400</td>
<td>Naphtha ethylene cracker</td>
<td>Mar 2018</td>
</tr>
<tr>
<td>Huating Coal</td>
<td>Gansu</td>
<td>200</td>
<td>CTP</td>
<td>Jun 2018</td>
</tr>
<tr>
<td>Haiwei</td>
<td>Hebei</td>
<td>200</td>
<td>PDH</td>
<td>Mar 2018</td>
</tr>
<tr>
<td>Yanchang Yan’an Energy</td>
<td>Shaanxi</td>
<td>250</td>
<td>CTO</td>
<td>Jul 2018</td>
</tr>
<tr>
<td>Hengli Petrochemical</td>
<td>Liaoning</td>
<td>440</td>
<td>Naphtha ethylene cracker</td>
<td>Nov 2018</td>
</tr>
<tr>
<td>Zhong’an Lianhe Coal Industry</td>
<td>Anhui</td>
<td>350</td>
<td>CTO</td>
<td>Nov 2018</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
<td><strong>1,840</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: ICIS

- Around 2.9m tonnes were initially planned for 2017
- Some projects have been delayed to beyond 2020
## Southeast Asia’s new PP capacities

<table>
<thead>
<tr>
<th>Company</th>
<th>Location</th>
<th>Country</th>
<th>Capacity (’000 tonnes/year)</th>
<th>Start up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nghi Son Refinery and Petrochemical</td>
<td>Thanh Hoa</td>
<td>Vietnam</td>
<td>400</td>
<td>H1 2018</td>
</tr>
<tr>
<td>Lotte Chemical Titan</td>
<td>Pasir Gudang</td>
<td>Malaysia</td>
<td>200</td>
<td>H1 2018</td>
</tr>
<tr>
<td>Chandra Asri</td>
<td>Banten</td>
<td>Indonesia</td>
<td>80 (debottlenecking)</td>
<td>Q3 2018</td>
</tr>
<tr>
<td>PETRONAS Chemicals Group</td>
<td>Johor</td>
<td>Malaysia</td>
<td>900</td>
<td>End 2018-2019</td>
</tr>
<tr>
<td>JG Summit Petrochemical Corp</td>
<td>Batangas</td>
<td>The Philippines</td>
<td>110 (expansion)</td>
<td>2020</td>
</tr>
<tr>
<td>Long Son Petrochemical</td>
<td>Vung Tao</td>
<td>Vietnam</td>
<td>430</td>
<td>2022</td>
</tr>
</tbody>
</table>

- Faster expansion as compared to PE with a few plants to start up this year
- Petronas’ RAPID project to expand PP production in Malaysia substantially
- Around 1.7m tonnes additional capacities by 2020

Source: ICIS
Current market dynamics and evolving trade flows
Asia’s PP Market Review – Flat Yarn

China, SE Asia, Vietnam PP Flat Yarn Prices ($/tonne)

- Wide gap between CFR China and CFR SE Asia prices; slight outflow of Chinese exports
- Weak market sentiment in Q2 on bearish futures prices, high inventory levels
- CFR China price bottoms out in Jul
- Prices rebound on improved demand during harvest season
- Persistent tight import supply in Q1 2018 continues to support prices
- Prices peak in early Mar
China’s PP imports decline amid new capacities

Source: China Customs
Current and future approximate PP capacities (tonnes/year)

- **Vietnam**
  - Existing: 150,000
  - Future: 980,000

- **Thailand**
  - Existing: 2.3m
  - Future: 1.5m

- **The Philippines**
  - Existing: 350,000
  - Future: 460,000

- **Indonesia**
  - Existing: 905,000
  - Future: 1.0m

- **Malaysia**
  - Existing: 400,000

- **Singapore**
  - Existing: 1.6m

Source: ICIS Supply & Demand Database
POLYPROPYLENE – 2020 Worldwide Product Flow

Source: ICIS Supply and Demand Database
Asia's PE Market Review – LLDPE & HDPE

China, SE Asia LLDPE & HDPE film prices ($/tonne)

- Prices not supported by feedstock; buy interest curbed by competitive domestic prices and healthy supply
- China prices shot up and maintained uptrend amid tight supply; producers focused on HDPE pipe production
- Wide gap between LLDPE and HDPE prices
- SE Asia HDPE film prices caught up to China
- China prices soften; subdued demand, high local inventory
- SEA prices fell sharply amid sales pressure, weak China demand
China’s PE imports fluctuated on sentiment

China PE import Volumes

![Graph showing the fluctuation of China's PE imports from January to November 2017, with percentage increases for each month.]

- 2016 imports in tonnes
- 2017 imports in tonnes
- Year-on-year monthly percentage increases

Source: China Customs
Current and future SE Asia PE capacities (tonnes/year)

- Vietnam: Existing: 0, Future: 1.05m
- Thailand: Existing: 3.75m, Future: 1.05m
- Malaysia: Existing: 1.1m, Future: 1.85m
- Singapore: Existing: 2.84m, Future: 1.83m
- Indonesia: Existing: 830,000, Future: 1.83m
- The Philippines: Existing: 320,000, Future: 570,000

Source: ICIS Supply & Demand Database
POLYETHYLENE – 2020 Worldwide Product Flow

Source: ICIS Supply and Demand Database
The future of the polymers industry in Asia
US’ LLDPE and HDPE exports have to find a home

- US LLDPE production expected to surpass local consumption growth substantially
- Domestic demand growth for HDPE to consume only half the additional supply
- Exports for both grades to increase significantly by 2025

Source: ICIS
China expected to import more specialty grade LLDPE

In 2017, China imported 3m tonnes of LLDPE, around 50% were specialty LLDPE grades.

More incentive for substitution expected when more volumes of MLLDPE becomes available.

In 2018, estimated import volume of MLLDPE to reach 1.5m tonnes amid increased domestic demand.

China’s plan to implement 25% tariff on US LLDPE/MLLDPE might affect import volume.
China’s commitment to better environmental practices likely here to stay

- Drastic cut in approved volumes (batch 8 out of 11) of waste PE and other plastic imports
- Estimates around 2m tonnes additional demand for virgin PE
- China might import more processed volumes as virgin material from 2018 onwards

**China’s import ban to boost virgin demand**

**LLDPE deficit countries and regions in 2018**

<table>
<thead>
<tr>
<th>Region</th>
<th>2017 (accumulative)</th>
<th>2018 (accumulative)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wastes and scraps of polyethylene</td>
<td>2,368,870</td>
<td>18,233</td>
</tr>
<tr>
<td>Wastes and scraps of other plastics, excluding crumbles of discarded compact disks</td>
<td>1,564,490</td>
<td>8,483</td>
</tr>
</tbody>
</table>

Source: ICIS
China’s road to PP self-sufficiency

- On track to be self-sufficient in PP by 2020, depending on run rates
- There are still requirements for specialty grades which is where international suppliers can help plug the gaps
- Incentive for international suppliers to explore other developing markets outside of China

![China's PP Domestic VS Import Consumption – 2016](chart)

China PE and PP Capacity and Consumption in 2016 VS 2020 (E)

- 2016
  - PE: 16,000,000 Capacity
  - PP: 23,000,000 Consumption
  - Imports: 4.57m, 19%  
  - Domestic production: 19.87m, 81%

- 2020
  - PE: 20,000,000 Capacity
  - PP: 25,000,000 Consumption
  - Imports: 70%  
  - Domestic production: 80%

- PE: 30,000,000 Capacity
  - PP: 31,000,000 Consumption
  - Imports: 67%  
  - Domestic production: 97%

Source: ICIS Supply & Demand Database
Who are the net PP importers and exporters in SE Asia?

Legend:
- **Net PP importers**
- **Net PP exporters**

Source: ICIS Supply & Demand Database
Vietnam – A growing PP market

- Stable and healthy PP consumption growth expected in the coming years
- Less reliant on imports as domestic production expand
- Vietnamese producers will be looking to export to other SE Asian countries
- Despite expansions, set to remain a net importer of PP in the near term
- Vietnam will remain a major outlet for Chinese exports as China’s PP production capacity expands

Source: ICIS Supply & Demand Database
# SE Asia’s PE and PP prospects in 2018

## Demand Growth Projections (annual % change)

<table>
<thead>
<tr>
<th>Country</th>
<th>2017-2018 (estimate)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PE</td>
</tr>
<tr>
<td>Indonesia</td>
<td>7.0</td>
</tr>
<tr>
<td>Vietnam</td>
<td>7.1</td>
</tr>
<tr>
<td>Thailand</td>
<td>3.2</td>
</tr>
<tr>
<td>Malaysia</td>
<td>3.3</td>
</tr>
<tr>
<td>The Philippines</td>
<td>6.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>2017-2018 (estimate)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PE</td>
</tr>
<tr>
<td>Myanmar</td>
<td>10.6</td>
</tr>
<tr>
<td>Cambodia</td>
<td>4.2</td>
</tr>
</tbody>
</table>

Source: ICIS Supply & Demand Database

## SE Asia PE & PP Consumption breakdown

- **2017 consumption**: 11.9m tonnes

- **Indonesia**: 28%
- **Vietnam**: 21%
- **Thailand**: 27%
- **Malaysia**: 15%
- **Philippines**: 7%
- **Singapore**: 2%

Source: ICIS Supply & Demand Database
Changing market environment in the Middle East
## India and Middle East new capacities

<table>
<thead>
<tr>
<th>Company, Location</th>
<th>PE Capacity (kt/year)</th>
<th>Start Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPaL, Dahej, India</td>
<td>LLDPE/HDPE: 720, HDPE: 340</td>
<td>H1 2017</td>
</tr>
<tr>
<td>Reliance, India</td>
<td>LLDPE/MLLDPE/HDPE: 550, LDPE: 400</td>
<td>Q3 2017</td>
</tr>
<tr>
<td>HPCL-Mittal Energy, India</td>
<td>1.2m tonnes/year mixed-feed cracker</td>
<td>2021</td>
</tr>
<tr>
<td></td>
<td>LLDPE/HDPE: 400, HDPE: 450</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Company, Location</th>
<th>PE Capacity (kt/year)</th>
<th>Start Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kordestan, Iran</td>
<td>LDPE: 300</td>
<td>2017</td>
</tr>
<tr>
<td>PetroRabigh, Saudi</td>
<td>LDPE/EVA: 160</td>
<td>Q3 2017</td>
</tr>
<tr>
<td>Sadara, Saudi</td>
<td>HDPE/LLDPE: 750, LDPE: 350</td>
<td>2017</td>
</tr>
<tr>
<td>Orpic, Oman</td>
<td>PE: 838</td>
<td>2021</td>
</tr>
</tbody>
</table>

Source: ICIS

- Regular exports of PE from India in 2018 as capacity expansion has outpaced domestic demand growth
- Volumes from Sadara not widely seen in Asia yet
As the Middle East is a price follower, HDPE film prices saw support in Q1 2018, tracking China prices.

From mid last year, LLDPE supply from Qatar to the rest of the GCC was tight due to blockade.
GCC PP prices closely track China, particularly during an uptrend

Premium of GCC prices over China not as straightforward as before
Middle East PE and PP production estimates

Mideast PE Production (’000 tonnes)

Mideast PP Production (’000 tonnes)
Middle East PE and PP consumption estimates
## Iran sanctions

<table>
<thead>
<tr>
<th>Current Payment Methods</th>
<th>Post sanctions financing?</th>
<th>What investors want</th>
</tr>
</thead>
<tbody>
<tr>
<td>No direct payment</td>
<td>Direct payment</td>
<td>Transparent financial frameworks</td>
</tr>
<tr>
<td>Through international bank accounts in Dubai, Hong Kong and Shanghai</td>
<td>Limited restrictions, including banks in Europe</td>
<td>Assurance funds are moving through proper channels</td>
</tr>
<tr>
<td>Process takes days to a week (delays common)</td>
<td>Real time</td>
<td>Speed of process</td>
</tr>
<tr>
<td>Currencies: UAE dirham, euro or yuan</td>
<td>Most currencies (use of US dollar uncertain)</td>
<td>Reduce FX volatility risk</td>
</tr>
<tr>
<td>High transaction costs</td>
<td>Limited transaction costs</td>
<td>Lower cost</td>
</tr>
</tbody>
</table>

12 May congressional deadline in which the US can re-impose sanctions
**Qatar blockade**

**MEASURES IN PLACE**

- Airspace closed
- Borders closed
- Ships with Qatari flag banned from docking at ports, causing shipment delays

**IMPLICATIONS**

- Unmet list of demands may lead to further sanctions
- Suspension or expulsion of Qatar from GCC mooted
- BAU for now but concerns weigh on economic impact
Asia’s Polymers Market Q3 2018 Outlook

Supply

• Growing US PE and China PP capacities to weigh on market
• India to export PE more regularly
• Healthier regional PE and PP supply expected after completion of turnarounds in Q2
• Persistently high feedstock ethylene prices might reduce supply of PE
• Sadara supply expected to be fully ramped up

Demand

• Ban on plastic waste imports in China may increase demand for virgin resins
• Relatively stagnant regional demand in SE Asia for finished goods expected after Eid ul-Fitr
• China’s additional tariffs on US PE imports might boost demand for other origins
• Market uncertainty to curb import demand, particularly for long shipment cargoes
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The tools you need to stay ahead of the changing Asian polyolefins industry

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Asia Polyolefins Price Forecast Reports
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- Market review and analysis, including trade flows and an economic outlook for polyolefins in the coming 12 months
- Scenario overview of China’s polyolefins imports and production against local consumption – base case and alternative situation

Supply and demand database
Get an end-to-end perspective across the global polyolefins supply chain, enabling you to grasp the local or regional scenario in a global context. The data includes import and export volumes, consumption, plant capacities, production and product trade flows – from 1978 up to 2040.