

The **ICIS China Polypropylene (PP) Annual Study** provides an exhaustive review of the current state of China's PP markets, as well as expert forecasts for up to 2017. This study will give you a greater understanding of the threats faced in the domestic PP market, the potential impact, and the opportunities available as a result of the emerging capacity in China.

The study includes an in-depth analysis of China's domestic PP market, as well as supply and demand, production, imports and exports, cost and arbitrage data, until 2017. Historical price trends from 2007 and key issues in the domestic PP markets are also included to give you an overall view of what is happening in China.



Overview

A new round of PP capacity expansion is taking place in China. This, together with the inflow of imported cargoes, has cast a shadow over the PP market since the start of 2013.

The lingering European debt crisis, an uncertain global economic recovery and slowing economic growth in China have dampened the market sentiment and buying interest, and the imbalance between PP supply and demand is becoming more acute.

Producers have to consider whether to cut their operating rates or to look for new energy sources as feedstock costs are rising and profits are decreasing. Market players were waiting for the launch of PP futures as the spot market sentiment is affected by the financial markets. Which factors are influencing the market and what are the new profitable growth opportunities? This report delivers a professional forecast for China's PP market and helps you to avoid risks and seize opportunities in a market full of uncertainties.

China is a major importer of PP, with its import volume totalling around 5.14m tonnes in 2012. An increasing number of suppliers are shifting their attention to the Chinese PP market as overseas capacities are expanding. Which products are fit for the Chinese market; which products are more competitive in China and how can you develop sales channels in China?



Highlights of the report

- Major grades and output of Chinese PP producers in 2013
- Top 10 traders of domestic and imported cargoes
- Cost comparison between oil-/and coal-to-polyolefins in China
- Current status and forecast of import supply
- China's PP demand forecast

Key market topics covered

- Progress of new PP projects and expansion PP projects in China, 2013-2017
- Opportunities and challenges for China's coal-based polyolefin projects
- The impact of the new energy revolution on China's import pattern

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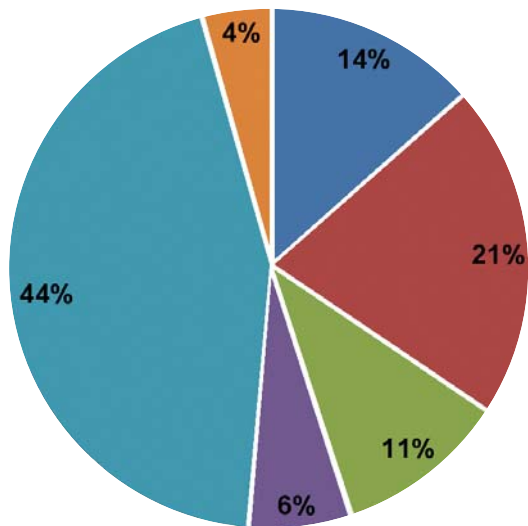
With over 30 years in the industry, ICIS is recognised domestically and internationally as a leading source of market information. Our insights of the Chinese market provided by our local-based experts in the region, combined with the expertise of our global analytical team, ensure that global market players receive unrivalled and independent insights into the opaque PP market.

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Snapshots from the report

China's PP granules output by grades, 2013



- BOPP
- Copolymer
- Fibre
- Injection
- Yam
- Others

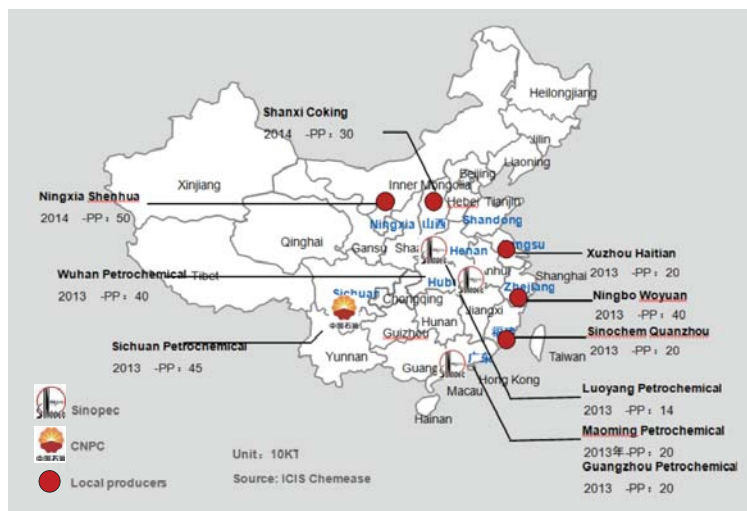
Source: ICIS Chemease

Output of major Chinese PP granules producers, 2013

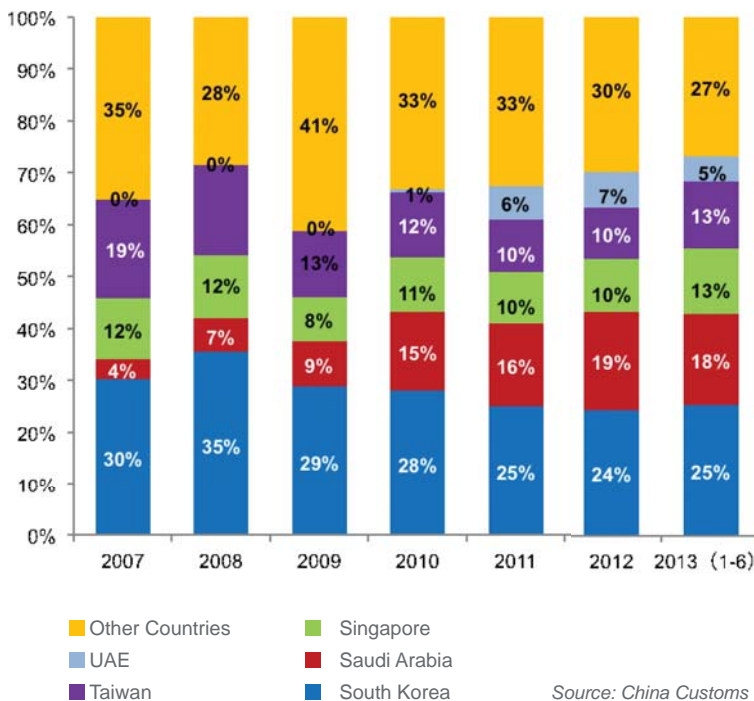
PP Producers	Output (Unit: 10,000 tonnes)
CNPC Dushanzi	6.34
Maoming Petrochemical	4.38

Source: ICIS Chemease

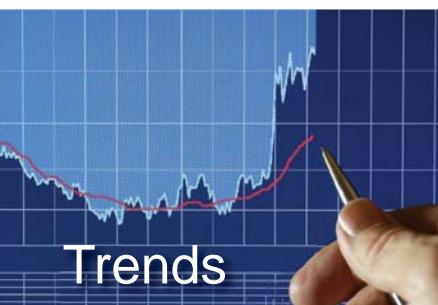
Progression of new and expansion PP projects in China, 2013-2014



Comparison of import origins for PP homopolymer between 2011 and 2012



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The **ICIS China Polyethylene (PE) Annual Study** is a comprehensive source of detailed data to support your production and investment decisions, and identify opportunities and risks in China's domestic PE market.

The study includes an in-depth analysis of China's domestic PE market, as well as supply and demand, production, import/export, cost and arbitrage data until 2017. Historical price trends from 2007 onwards, plus key issues in the domestic PE markets are also included to give you an overall view of what's happening in China.



Overview

A new round of capacity expansion, together with increasing imports, has cast a cloud over the China PE market. Amid the crisis-ridden Europe, uncertainty about the global economic recovery and a slowing Chinese economy, the market sentiment and buying interest of PE participants have weakened significantly, causing an imbalance between supply and demand.

Faced with rising feedstock costs and squeezed margins, producers have had to consider production cuts or find alternative energy sources. What factors are influencing the market? And what will be the next profit growth point? These questions are raised when spot traders' sentiments are steered by the futures market.



Despite slowing economic growth, China still has an enormous demand for PE. This report will forecast future development of China's PE market from a professional perspective. It will help you avert risks and turn challenges into opportunities by drawing conclusions from past experiences. In addition, this report also compares costs of coal-based olefin and naphtha-based olefin products, and analyses the advantages and challenges of coal-to-olefin projects in China.

Highlights of the report

- Major Chinese polyolefin producers' output (by grade and code) in 2013
- Top 10 traders of domestic and imported cargoes
- Cost comparison between naphtha-based and coal-based polyolefin products in China
- Status quo and forecast on import supply
- Case study of LLDPE futures-spot arbitrage

Key market topics covered

- A follow-up report on new PE capacities in China, 2013-2017
- Opportunities and challenges facing coal-to-olefin projects in China
- The growing mutual influence of LLDPE futures and spot markets
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Demand

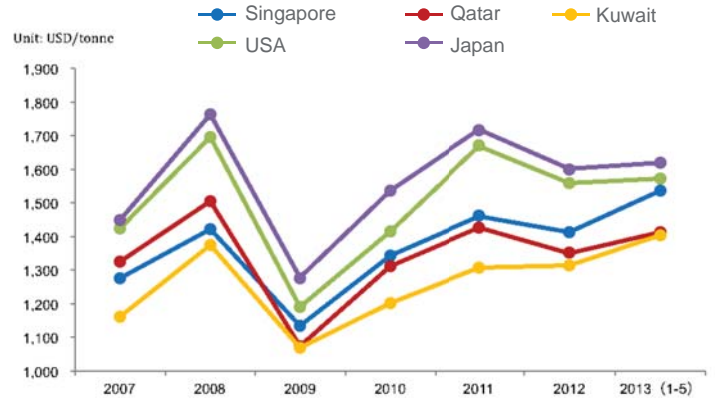
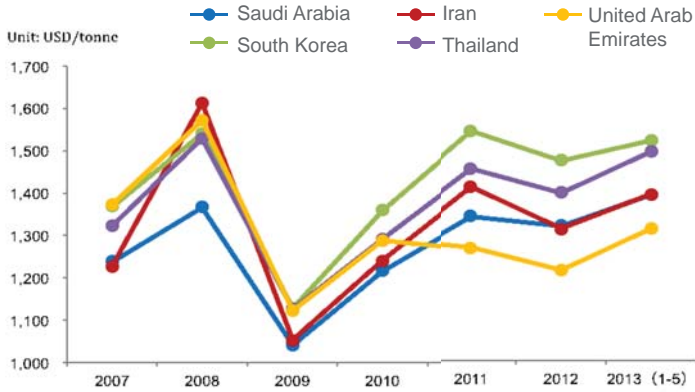
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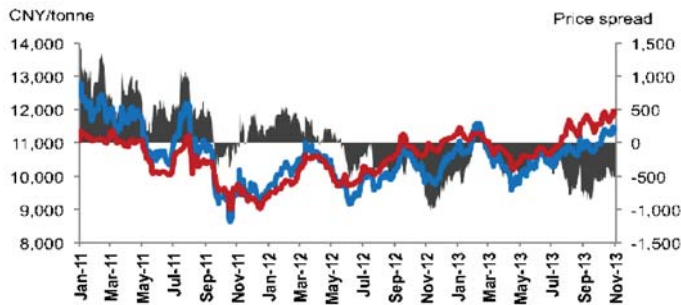
Snapshots from the report

China's LLDPE import origins

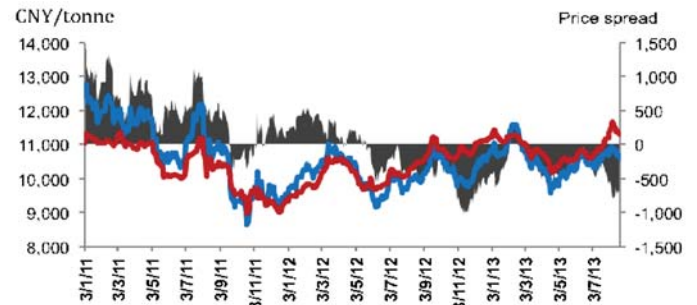


Source: China Customs

LLDPE futures and spot prices in China



■ Price Spread = Futures Contract Price Average-LLDPE Film Domestic Price
 ■ Futures Contract Price Average
 ■ Domestic Price (EXWH north, south & east China)



■ Spread = LLDPE futures settlement price-LLDPE film domestic spot price
 ■ Spread = LLDPE futures settlement price
 ■ LLDPE film domestic spot price

Source: ICIS Chemease / Dalian Commodity Exchange

China's PE output by grade, 2013



Source: ICIS China

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