Before 2009, the global ethylene capacity had mostly been concentrated in developed countries such as the United States and European countries, while recent years have seen soaring capacity in Asia and the Middle East. In 2009 and 2010, the newly-increased capacity in Asia was 1.8 million tons and 7.29 million tons respectively, while they were 5.22 million tons and 1.6 million tons in the Middle East. The rapid capacity expansion in the Middle East will exert considerable influence on China’s ethylene market. In 2009, the global ethylene capacity reached 137 million tons, and it is expected to realize 145 million tons in 2010.
In 2009, the global ethylene consumption touched 111 million tons. It is expected that ethylene demand will increase by over 3% to more than 114 million tons in 2010. By region, the demand growth is limited in the mature markets of developed counties; Asia has become the major contributor to the robust demand growth, and will account for 60% of the global demand surge in the upcoming 5 years, and half of the Asian demand growth will come from China.

In 2009, China’s ethylene equivalent consumption reached 24 million tons, while its ethylene output was no more than 10.7 million tons in the same year, bringing the self-sufficiency rate below 50%. To turn things for the better, China has built a number of new ethylene facilities in recent years. In 2009 and 2010, the newly-increased ethylene capacity reached 1.8 million tons and 3.25 million tons respectively.

The report not only delves into the supply and demand, new production capacity and regional distribution of global and China ethylene industry as well as China’s import and export of ethylene, but also highlights the development of leading ethylene manufacturers in China and beyond.
The report not only delves into the supply and demand, new production capacity and regional distribution of global and China ethylene industry as well as China’s import and export of ethylene, but also highlights the development of leading ethylene manufacturers in China and beyond.

The ethylene industry in China features high regional concentration, with major manufacturing bases concentrated in provinces and municipalities such as Guangdong and Shanghai. In 2008, Guangdong accounted for 20% of the total output of ethylene, and major manufacturers include Maoming Petrochemical and CNOOC & Shell Petrochemicals Company Limited; Shanghai accounted for 17.7%, and leading manufacturers include Sinopec Shanghai Petrochemical Company Limited and Shanghai SECCO Petrochemical Company Limited. New ethylene facilities are generally closed to oil fields or in the regions where the petrochemical industry is relatively mature. Typical enterprises include PetroChina Dushanzi, Sinopec Zhenhai Refining & Chemical Company, Sinopec Tianjin and Fujian Refining & Petrochemical Company Limited (FREP).
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Publication date: Sep. 2010

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