

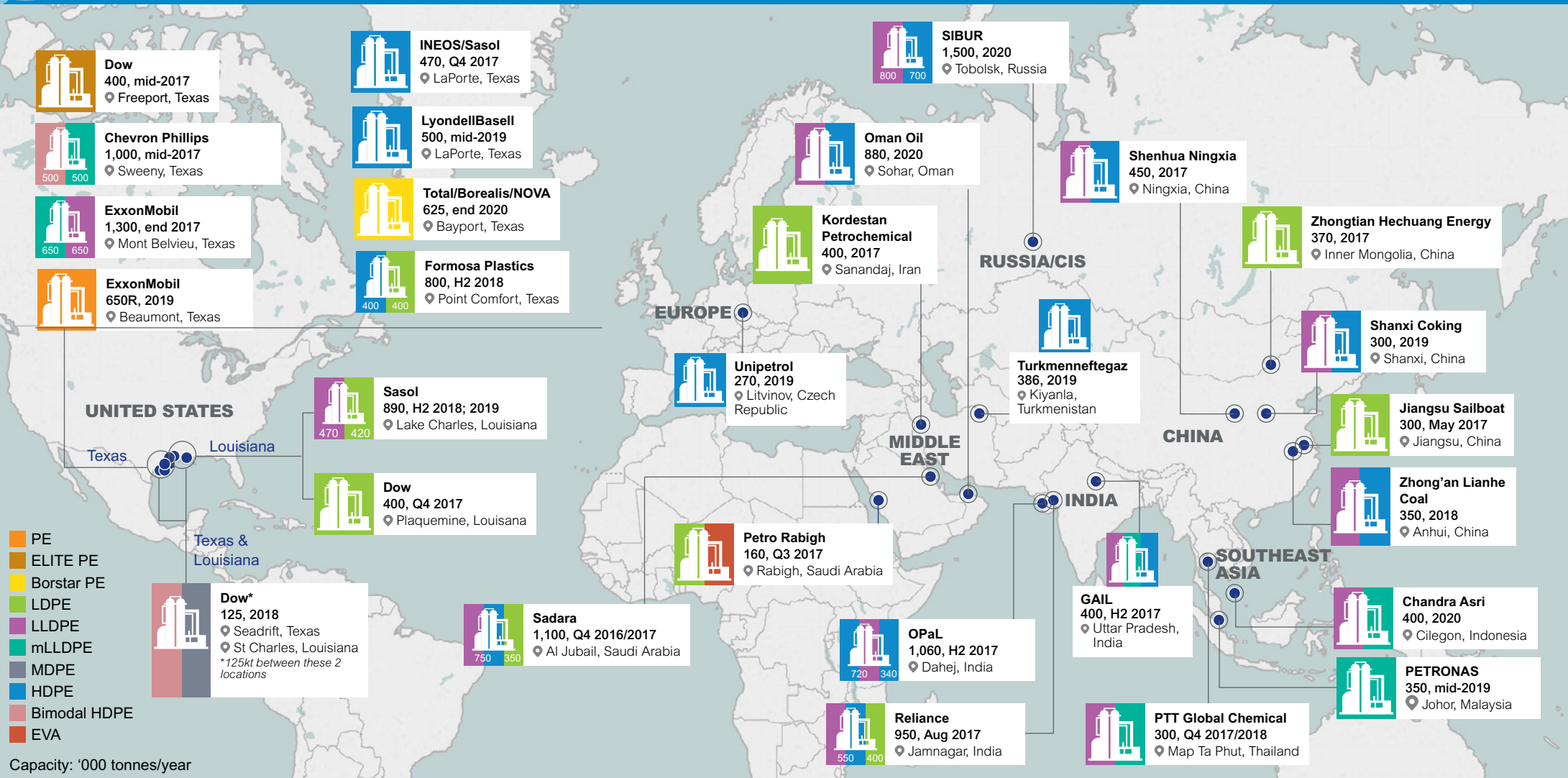


NEW POLYETHYLENE (PE) CAPACITIES TO HAVE WIDESPREAD IMPACT

By Linda Naylor & Katherine Sale

As new PE capacity comes on stream globally – which started in 2017 and will continue into 2018 and beyond – the impact on the global supply and demand balances will be far reaching. There is concern that tariffs on US material to China will exacerbate their impact, and fresh trade routes will have to be found, irrespective of the potential impact on the pricing. Europe is particularly open to such impact.

GLOBAL PE EXPANSIONS



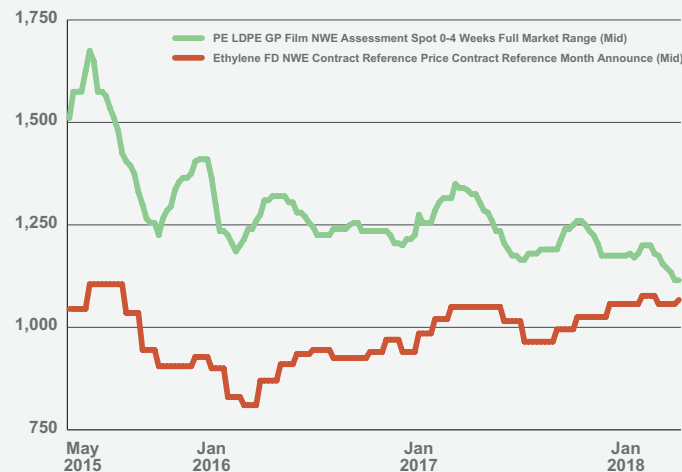
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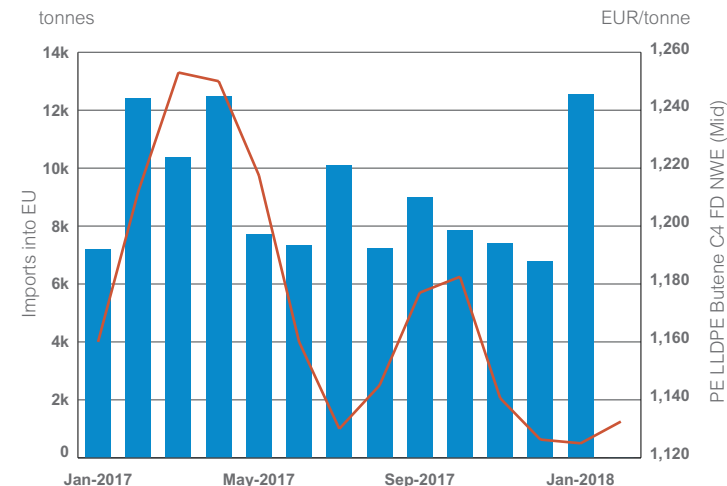
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SPOT LDPE V ETHYLENE CONTRACT



The spread hit high levels in 2015 on supply shortages, and has been decreasing ever since.

LLDPE IMPORTS AND SPOT PRICES



There is a clear correlation between higher import levels and lower linear low-density PE (LLDPE) C4 spot pricing.

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