

TARGET



CENTRAL AND
EASTERN EUROPEAN
MARKETS?

Our newest study can help you entering the CEE polyolefin markets

by

- clearing the polyolefin market situation in Central and Eastern Europe
- discussing polyolefins in detail
- showing accurate consumption numbers by countries
- reviewing import and export statistics
- describing market and country characteristics
- understanding the expectations of potential buyers
- revealing possible market gaps
- including forecasts for the future

with the help of numerous tables and figures

In Hungary, with the exception of LDPE all polyolefin grades are being produced largest in the CE region after Poland and the Czech Republic. The LDPE products cover local needs, but export and import alike are significant. Goods are traded countries. Most significant countries of origin: Germany, Holland, Slovakia. The markets: Poland, Germany and Slovakia.

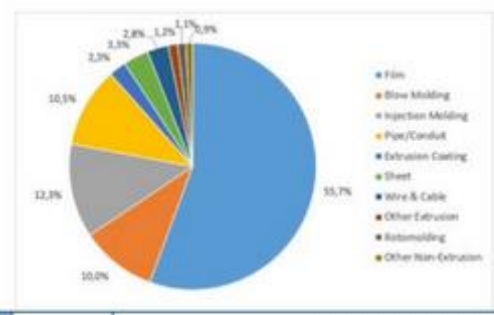
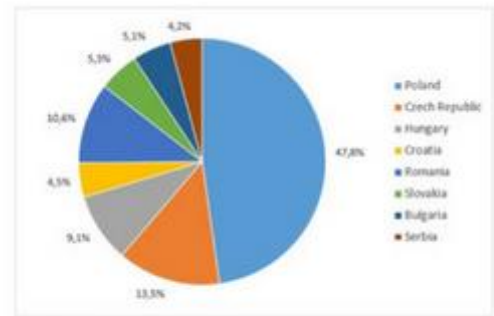
28 Hungary's ANEP parameters regarding LDPE 2017

LOPE 2015	Hungary	
	Import	Export
1.	GERMANY 16 145	POLAND
2.	NETHERLANDS 14 478	GERMANY
3.	SLOVAKIA 8 522	SLOVAKIA
4.	BELGIUM 4 678	ROMANIA
5.	AUSTRIA 2 305	ITALY
6.	FRANCE 2 229	CZECH REPUBLIC
7.	NETHERLANDS 1 980	AUSTRIA
8.	FRANCE 1 812	SERBIA
9.	NETHERLANDS 1 158	LITHUANIA
10.	NETHERLANDS 1 068	UKRAINE

used is imported. The largest suppliers are Belgium, South Korea minimum, even below 1,000 tons in 2015.

parameters regarding LDPE 2017

Importers	Hungary	
	Quantity (t)	Main export destinations
EUROPE	4 174	AUSTRIA 380
OF SOUTH KOREA	2 747	GERMANY 216
FRANCE	2 447	SLOVAKIA 127
ITALY	1 957	BULGARIA 97
NETHERLANDS	1 889	SLOVAKIA 87
NETHERLANDS	1 635	POLAND 72
NETHERLANDS	1 233	CROATIA 35
NETHERLANDS	1 202	CZECH REPUBLIC 9
CZECH REPUBLIC	1 139	SERBIA 5
NETHERLANDS	848	FINLAND 5



Country	Total demand 2016 (Kt)	Total capacity 2016 (Kt)	Market gap 2016 (Kt)	Total demand 2021 (Kt)	Total capacity 2021 (Kt)	Market gap 2021 (Kt)	Total demand 2026 (Kt)	Total capacity 2026 (Kt)	Market gap 2026 (Kt)
Poland	140.6	400.0	-140.6	171.0	400.0	-273.3	202.0	400.0	-400.0
Czech Rep.	161.4	275.0	-86.4	145.0	275.0	-170.2	127.0	275.0	-275.0
Hungary	220.9	280.0	-59.1	261.6	280.0	-16.4	213.5	280.0	-33.5
Croatia	34.9	0.0	34.9	35.0	0.0	35.3	46.4	0.0	46.4
Romania	137.5	80.0	-57.5	190.9	80.0	-110.9	229.3	80.0	-149.3
Slovakia	140.3	250.0	-114.7	213.8	250.0	-41.2	247.6	250.0	-7.4
Bulgaria	78.1	80.0	-1.9	110.0	80.0	-33.8	137.1	80.0	-77.3
Serbia	25.0	25.0	0.0	34.9	200.0	165.1	45.1	200.0	154.9
Russia*	339.4	1770.0	-1430.6	1222.7	3870.0	-2647.3	1484.5	5370.0	-3885.5
Ukraine*	86.4	0.0	86.4	109.9	0.0	109.9	154.7	0.0	154.7
Other CE	71.2	0.0	71.2	106.2	0.0	106.2	127.0	0.0	127.0
Other EE	204.1	170.0	-34.1	251.2	93.0	158.2	308.8	93.0	215.8
TOTAL PE	2940.3	3340.0	-399.7	3465.9	5470.0	-1704.1	4441.0	6070.0	-1629.0

At the present the CEE region is a minor polypropylene exporter. But this applies rather to homopolymer only, the market needs imported copolymer and random copolymer, in the technical application and pipe segments in particular.

The net exporter position will strengthen significantly with the entering new Russian capacities. PPC and PFB shortage will drop in case ethylene production will be started in Tobolsk and if SIBUR will be able to produce PFC and PFB as well.

Central Europe

Because the main focus of the study is how the Russian can enter to the CE polyolefin market we made a deeper analysis about the principles of the CE polyolefin market. The CE market is not that black and white, here no significant capacity enlargement projects can be anticipated in PE manufacturing during the next years to come and in the future either. Due to the naphtha-based monomer production (Stozicz) during the next 10 years we shall anticipate the continuous growth of demand.

E. Polyethylene in CE

The CE region is net polyethylene exporter. Stozicz by 2021 it will become and stay net importer. If we check the individual resin grades, this applies to LDPE and LLDPE, whereas in case of HDPE oversupply dropping every year will be typical.

that you could easily use at work

It is known that we are ahead interesting times regarding the Central and Eastern European polyolefin market.

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Want to know more?



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2017