Global Ethylene Market Research Report: Information by Feedstock (Naphtha, Ethane, Propane, Butane, and Others), Application (Polyethylene, Ethylene Oxide, Ethylene Benzene, Ethylene Dichloride, Ethylene Glycol, Vinyl Acetate, Alpha Olefins, and Others), End-Use Industry (Packaging, Automotive, Construction, Agrochemical, Textile, Chemicals, Rubber & Plastics, Soaps & Detergents, and Others), and Region (Asia-Pacific, North America, Europe, Latin America, and Middle East & Africa)—Forecast till 2025

Ethylene is a colorless gas, which has a faint, pleasantly sweet smell and is very reactive and flammable. It does not dissolve in water but mixes well with most organic (carbon-containing) solvents. Ethene is a part of a group of substances known as volatile organic compounds (VOCs). The global ethylene production stood at 165 million metric tons in 2017. The global market is projected to register a CAGR of over 6% during the forecast period. The principal factor driving the global ethylene market is its extensive use in the production of polyethylene. The widespread use of polyethylene in packaging application is expected to propel the demand for polyethylene in the coming years. Low-density polyethylene (LDPE) and linear low-density polyethylene (LLDPE) are used for manufacturing pharmaceutical and squeeze bottles, caps and closures, trash bags, films for frozen food and dry goods packaging, and laminations. High-density polyethylene (HDPE) is used in applications such as crates, trays, bottles for milk and fruit juices, caps for food packaging, jerry cans, drums, industrial bulk containers, among others. HDPE can also be extruded into pipes for water, gas and irrigation, and film for refuse sacks, carrier bags, and industrial lining. The increasing working population across the globe has resulted in a demand for packaged food beverages, propelling the demand for polyethylene. Another factor driving the global ethylene market is the growing automotive industry with a total production of 95,634,593 units in 2018. Polyethylene is widely used in manufacturing car bodies (glass reinforced), electrical insulation, fuel tanks, wiring & cables, and others. The use of HDPE pipes helps conserve energy and water by creating virtually leak-free pipes, which are not prone to corrosion and resist environmental stress. Increasing investment in construction and infrastructural development has resulted in an increased number of construction activities, therefore, raising the demand for polyethylene in the construction industry. Players in this market are continuously working towards strategic growth initiatives such as collaboration, expansion, and merger to strengthen their position in the global market and to remain in the forefront to meet the rising demand for the product. For instance, in June 2019, Exxon Mobil Corporation and SABIC formed a joint venture called Gulf Coast Growth Ventures and announced the construction of a chemical facility and an ethane steam cracker in Texas, the US. The facility will produce materials that will be used in the manufacture of various products, such as automotive coolants, packaging, and construction materials. Additionally, the facility will also include two polyethylene units and a mono-ethylene glycol unit. However, stringent government regulations on the use of petroleum-based products are projected to restrain the market growth during the forecast period. Nevertheless, the increasing inclination towards the use of bio-based ethylene is a megatrend followed in this market.

Regional Analysis

The global ethylene market has been studied for five regions, namely, Asia-Pacific, Latin America,
Europe, North America, and the Middle East & Africa. Asia-Pacific accounted for the largest market share in 2018 and is expected to continue its dominance over the review period. This is attributed to the expanding end-use industries such as packaging, automotive, construction, agrochemical, textile, and others in the region. Fast-paced industrialization and urbanization in emerging economies coupled with the presence of major agricultural countries in this region have resulted in high demand for polyethylene-based products. For instance, according to India Brand Equity Foundation, the country’s overall textile exports during 2017–2018 stood at USD 39.2 billion. North America and Europe are expected to witness moderate growth on the backdrop of stringent government regulations on the use of VOC emitting substances. The US Environmental Protection Agency and the European Chemicals Agency regulate the use of ethylene through Clean Air Act, Clean Water Act, European Directive (793/93), EC Ambient Air Daughter Directive (1999/30/EC), and the European Solvents Directive (99/13/EC).

Segmentation

The global ethylene market has been segmented by feedstock, application, end-use industry, and region. Based on feedstock, the global market has been segmented into naphtha, ethane, propane, butane, and others. By application, the global market is categorized into polyethylene, ethylene oxide, ethylene benzene, ethylene dichloride, ethylene glycol, vinyl acetate, alpha-olefins, and others. Based on end-use industry, the global ethylene market has been segmented into packaging, automotive, construction, agrochemical, textile, chemicals, rubber & plastics, soaps & detergents, and others.

Key Players

Some of the prominent players operating in the global ethylene market are SABIC (Saudi Arabia), Dow (US), Exxon Mobil Corporation (US), Royal Dutch Shell (Netherlands), China Petroleum & Chemical Corporation (China), Chevron Phillips Chemical Company (US), Total (France), LyondellBasell Industries Holdings B.V. (the Netherlands), China National Petroleum Corporation (China), Repsol (Spain), BASF SE (Germany), Westlake Chemical Corporation (US), Sasol (South Africa), Mitsubishi Chemical Corporation (Japan), and NOVA Chemicals Corporation (Canada).

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- Potential investors
- Raw material suppliers
- Nationalized laboratories
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