

Mixed Xylenes

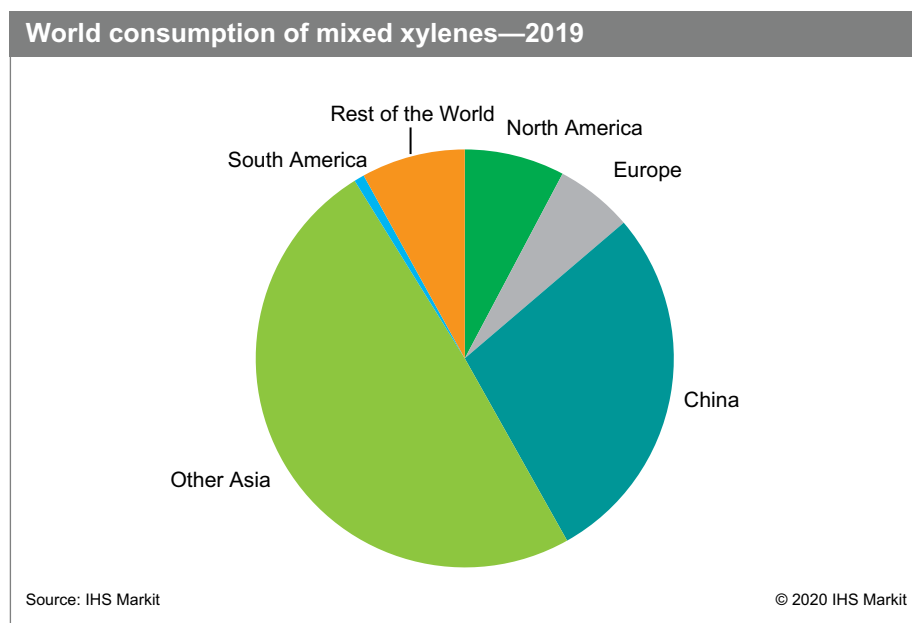
31 January 2020

Abstract

Mixed xylenes are produced by several methods but petroleum is by far the major source. para-Xylene is the most widely used of the three xylene isomers. The major application for para-xylene is, by far, the production of purified terephthalic acid (PTA), which itself is used almost exclusively for the production of polyethylene terephthalate (PET) polymer for the manufacture of polyester fibers, PET solid-state resins, and PET film. The past 15 years have seen substantial investment in mixed xylenes capacity, primarily for use in para-xylene. These investments have been located mainly in Northeast Asia, which has a well-developed, integrated polyester industry as well as access to raw materials. Asian polyester producers have moved to back-integrate their business into purified terephthalic acid, para-xylene, and mixed xylenes to improve their cost-competitiveness.

Asia, with its large population, growing demand for polyester fiber (fibers, fabrics, and floor coverings) and polyester resins (beverage containers), and corresponding growth in the polyester industry, is solidifying its position as the center of influence for the mixed xylenes market.

The following pie chart shows world consumption of mixed xylenes:



In the next five years, mixed xylenes capacity is expected to further increase at an average rate of 3–4% per year, driven primarily by new investments in mainland China, the United States, and Saudi Arabia, while consumption will grow at an average of 3–4% per year. However, changes in fuel consumption as well as new regulations such as IMO 2020 are projected to modify the mixed xylenes production pattern in the medium term. This report provides an excellent insight

Contacts

Koon-Ling Ring • Koon-Ling.ring@ihsmarkit.com
Maria deGuzman • Maria.deguzman@ihsmarkit.com

into the global market for mixed xylenes, including producers, capacity, process, demand by application, and trade. It has been compiled using primary industry research and brings together elements of other IHS Markit reports.

For more detailed information, see the table of contents, shown below.

IHS Markit's Chemical Economics Handbook – *Mixed Xylenes* is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Global summary;
regional coverage



Producers with
annual capacities
and plant sites



Production figures
and trends



Consumption and
forecasts by end use
application



Manufacturing
processes and
environmental issues



Trade – imports
and exports

Key benefits

IHS Markit's Chemical Economics Handbook – *Mixed Xylenes* has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade, and economics.

This report can help you

- Identify trends and driving forces influencing chemical markets
- Forecast and plan for future demand
- Understand the impact of competing materials
- Identify and evaluate potential customers and competitors
- Evaluate producers
- Track changing prices and trade movements
- Analyze the impact of feedstocks, regulations, and other factors on chemical profitability

Contents

Executive summary	6
Summary	8
Introduction	12
Sources	14
Catalytic reformat	14
Pyrolysis gasoline	14
Gas liquids	15
Toluene disproportionation and transalkylation	15
Coal-derived mixed xylenes	16
Environmental issues	17
Supply and demand by region	18
World	18
– Capacity	18
– Producing companies	19
– Salient statistics	21
– Consumption	22
– Isomers	24
– Gasoline blending	25
– Solvents	25
– Other	25
– Price	25
– Trade	26
North America	27
– Capacity	27
– Salient statistics	28
– Consumption	29
– Trade	30
United States	31
– Producing companies	31
– Salient statistics	33
– Consumption	34
– Trade	36
Canada	37
– Producing companies	37
– Salient statistics	37
– Consumption	38
– Trade	39
Mexico	40
– Producing companies	40
– Salient statistics	41

– Consumption	42
– Trade	43
South America	43
– Producing companies	43
– Salient statistics	45
– Consumption	46
– Trade	47
Western Europe	48
– Producing companies	48
– Salient statistics	50
– Consumption	51
– Trade	53
Central Europe	54
– Producing companies	54
– Salient statistics	55
– Consumption	55
– Trade	57
CIS and Baltic States	57
– Producing companies	57
– Salient statistics	59
– Consumption	59
– Trade	61
Middle East	62
– Producing companies	62
– Salient statistics	64
– Consumption	64
– Trade	66
Africa	67
– Producing companies	67
– Salient statistics	67
– Consumption	68
– Trade	69
Indian Subcontinent	70
– Producing companies	70
– Salient statistics	71
– Consumption	72
– Trade	74
Northeast Asia	74
– Capacity	74
– Salient statistics	75
– Consumption	76
– Trade	78
China (mainland)	79

– Producing companies	79
– Salient statistics	83
– Consumption	84
– Trade	86
Japan	86
– Producing companies	86
– Salient statistics	89
– Consumption	90
– Trade	92
South Korea	93
– Producing companies	93
– Salient statistics	95
– Consumption	95
– Trade	97
Taiwan	98
– Producing companies	98
– Salient statistics	99
– Consumption	100
– Trade	101
Southeast Asia	102
– Producing companies	102
– Salient statistics	105
– Consumption	105
– Trade	107
Additional resources	108
Revisions	109

IHS Markit Customer Care

CustomerCare@ihsmarkit.com

Americas: +1 800 IHS CARE (+1 800 447 2273)

Europe, Middle East, and Africa: +44 (0) 1344 328 300

Asia and the Pacific Rim: +604 291 3600

Disclaimer

The information contained in this report is confidential. Any unauthorized use, disclosure, reproduction, or dissemination, in full or in part, in any media or by any means, without the prior written permission of IHS Markit or any of its affiliates ("IHS Markit") is strictly prohibited. IHS Markit owns all IHS Markit logos and trade names contained in this report that are subject to license. Opinions, statements, estimates, and projections in this report (including other media) are solely those of the individual author(s) at the time of writing and do not necessarily reflect the opinions of IHS Markit. Neither IHS Markit nor the author(s) has any obligation to update this report in the event that any content, opinion, statement, estimate, or projection (collectively, "information") changes or subsequently becomes inaccurate. IHS Markit makes no warranty, expressed or implied, as to the accuracy, completeness, or timeliness of any information in this report, and shall not in any way be liable to any recipient for any inaccuracies or omissions. Without limiting the foregoing, IHS Markit shall have no liability whatsoever to any recipient, whether in contract, in tort (including negligence), under warranty, under statute or otherwise, in respect of any loss or damage suffered by any recipient as a result of or in connection with any information provided, or any course of action determined, by it or any third party, whether or not based on any information provided. The inclusion of a link to an external website by IHS Markit should not be understood to be an endorsement of that website or the site's owners (or their products/services). IHS Markit is not responsible for either the content or output of external websites. Copyright © 2020, IHS Markit®. All rights reserved and all intellectual property rights are retained by IHS Markit.

