NEW GROWTH POTENTIALS AND RATIONALISATION

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SABIC AT-A-GLANCE

1976 Company established
34,000 Employees around the world
50 Countries of operations
4th Largest global chemical company*
117th Largest public company in the world
4 Core businesses

86 US$ B** Total assets
4.9 US$ B** Net income
39.9 US$ B** Annual revenue
≈ 150 New products each year
11,534 Global patent filings
61 World-class plants worldwide

*Forbes 2017 **Billion
SABIC IN INDIA, FOR INDIA

MANUFACTURING/VADODARA

Total Area : 29 Acre

Compounding Plant

Plant Start up : Q4 1993

Product Capability: Advanced engineering compounded thermoplastics

Sheet Plant

Plant Start up : Q4 2009

Product Capability: Roofing, Skylight, Cladding, Sound Barrier

VADODARA MANUFACTURING SITE

SABIC WORLDWIDE BROUGHT TO INDIA

SABIC INDIA PVT LTD, GURGAON

Chemicals Business:

- Olefins, Aromatics & Chlor Alkali, Glycols and Oxygenates, OXO alcohols, Linear Alpha Olefins (LAO)

Polymers Business:

- PP, LDPE, HDPE, LLDPE, PVC, PS, PET and range of Engineering Thermoplastics

Agri-Nutrients Business:

- AMMONIA, UREA & DAP

JUBAIL

GELEEN

SABIC IN INDIA, FOR THE WORLD

SABIC TECHNOLOGY CENTER BENGALURU

Land Area: 46 Acre

Investment: > US$ 100 Million

Inaugurated in October 2013

More than 320 research scientists & engineers

4 STAR GRIHA rating by ADaRSH LEED India–Gold certified/100% Export Oriented Unit for captive SABIC Research

BENGALURU RESEARCH CENTER
PETROCHEMICALS TOUCHING OUR LIVES

BIOTECHNOLOGY
PHARMACEUTICAL CHEMICALS
AGRO CHEMICALS
FINE CHEMICALS
SPECIALTY CHEMICALS
PERFORMANCE CHEMICALS
BULK INTERMEDIATES
BASIC CHEMICALS

TEXTILES
CONSUMER
APPLIANCES/ELECTRONICS
AUTOMOBILE INDUSTRY
ELECTRONICS
AGROCHEMICALS
PHARMACEUTICALS
MASS TRANSPORTATION
CONSTRUCTION
FRAGRANCES & FLAVOURS
AGRI-NUTRIENTS
Global Chemicals Market is expected to grow at CAGR ~ 4% from US$ 4T Now to US$ 7 T in 2030

Indian Chemical Industry is expected to grow from ~ US$ 130 B to US$ 300 B by 2025 at CAGR ~ 9%

Source: IHS Markit, CEFIC, GOI website
INDIA C2 ETHYLENE GROWTH: VERY ATTRACTIVE

INDIA ETHYLENE GROWTH BY MAJOR END USE

Ethylene demand growth rate varies between 7.5 – 14% between sub-segments which is very attractive

Source: IHS Markit
SUCCESSFUL PETROCHEMICAL GROWTH IN INDIA: IMPERATIVES

- Refinery & Petrochemical Integration
- Operating Rate & Reliability
- Utilities/Infrastructure
- Petrochemical Zones, PCPIRs
- Indian Petrochemical Growth Strategic Drivers & Enablers
- Manpower
- Free Trade Agreements

Partnerships need to be forged between upstream and petrochemical players
SUCCESSFUL PARTNERSHIPS: STRATEGIC DRIVERS & ENABLERS

Successful Partnerships in India

- Secured feedstock at competitive prices
- Modern infrastructure & efficient logistic network required across India
- Reliable utility supply & good infrastructure available in PCPIRs

Drivers & Enablers:

- Feedstock
- Infrastructure
- Utilities
- Market
- Partnership
- Policies

- Good market access for locally produced & imported chemical products
- ‘Win-win’ & reliable partnerships with leading Indian Partners
- Clear & simplified policies and approval systems for major petrochemical investments