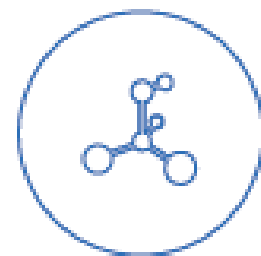


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PPE: Market Dynamics – Refined Products 2016

Market Dynamics Refined Products - 2016 is one in a series of reports published annually as part of the Petroleum and Petrochemical Economics (PPE) program.

This report provides an in-depth analysis of refined products including:

- LPG
- Naphtha
- Gasoline
- Kero/Jet Fuel
- Diesel/Gas Oil
- Residual Fuel

Minor products such as lubricants, waxes, etc, are excluded from this report.

Published: December 2016

Abstract:

The demand for refined products continues to grow with the increase in global energy requirement. The trend of a lighter refined barrel is expected to continue as demand growth for diesel/gas oil and other lighter products continues and the need for heavy residual fuel oil declines. This increased demand for refinery conversion or “upgrading” capacity along with the shift towards cleaner, low sulfur products will require more complex refining operations in order to meet market requirements.

Total global demand for major petroleum products grew at an average annual rate of 1.1 percent from 2000 to 2016; growth is expected to continue at similar levels from 2016 to 2035. With the exception of residual fuel and gasoline, all products are expected to see moderate growth over the forecast period. Diesel/gas oil will be the key demand driver and is expected to increase its market share by 2035.

The highest growth for refined products will be achieved in the developing regions of the world. Asia is the largest consumer of refined products, currently accounting for over one third of the total global market.

Incremental Global Oil Product Demand, 2016-2035
Million tons per year

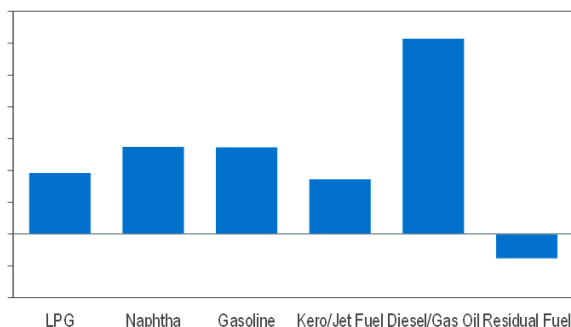


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Chapters 4 to 10 are segmented as below for each region and highlighted country:

- Demand
- Current and Planned Refining Capacity
- Supply
- Net Trade

This analysis will identify the issues shaping the industry, as well as provide an independent appraisal of the market.

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