2018

中国对二甲苯产业链技术与市场论坛

China PX Industry Chain Technology & Market Forum

四川 成都　　Chengdu Sichuan　　2018.4.28

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会议背景

2017年中国聚酯（PET）行业景气度继续回升，盈利能力增强，有效产能达到5000万吨，产量约4100万吨。2018年中国聚酯终端消费保持增长，而2018年中国对废塑料进口限制政策的落实，将大幅降低再生PET的进口量，从而为原生PET带来更多市场空间。预计2018年中国聚酯下游需求增速将达10%左右。

聚酯产量的增长带动了精对苯二甲酸（PTA）和对二甲苯（PX）的需求量。2017年中国PTA总产能4700万吨，有效产能3640万吨。预计2018年中国PTA总产能将达4923万吨，有效产能4628万吨，有效产能开工负荷将达90%。相应地，中国PTA生产对PX的消费量将达2750万吨。

从2017下半年开始国际油价强势回升，预计2018年布伦特油价将在65-70美元/桶，从成本层面有力支撑PX和PTA价格的同时，也对中国PX和PTA行业的盈利能力形成巨大挑战。受中国涤纶、聚酯和PTA行业的持续拉动，全球PX-PTA产业链增长集中于东北亚地区。中国PX需求旺盛而供应不足，净进口量持续增长，2017年中国PX净进口量超过1400万吨。

在此背景下，以先进技术建设大规模PX生产装置，以及开拓PX原料多元化来源成为行业的必然选择。随着中国新一轮炼化一体化和PX项目建设热潮，中国大量进口PX的局面2020年之后将会扭转。与此同时，煤（甲醇）制芳烃、甲苯甲醇烷基化制PX、煤焦油制芳烃、甲烷或合成气直接转化制芳烃等新技术研发及应用也已取得成果。

2018中国对二甲苯产业链技术与市场论坛将于4月28日在四川成都召开。会议将探讨中国聚酯/PTA供需与价格前景分析，PX-PTA行业技术优化、利润前景与期货市场运行情况，亚洲与中国芳烃产能扩张展望，大型芳烃项目建设经验与技术选型，不同原料来源生产PX的技术与成本竞争力比较，芳烃增产技术创新与应用等。

会议主题

1.中国聚酯/PTA供需与价格前景分析
2.亚洲与中国芳烃产能扩张展望
3.新建炼化一体化及配套芳烃项目规划
4.山东地炼重整装置分析与PX产能潜力
5.大型芳烃项目建设经验与技术选型
6.国产芳烃系列技术开发与运行实践
7.煤（甲醇）制芳烃技术进展与经济性分析
8.甲苯甲醇烷基化生产PX技术与工业化应用
9.提升PX收率的技术—甲苯歧化、二甲苯异构化与重芳烃轻质化
10.芳烃原料多元化—煤焦油制芳烃、甲烷或合成气直接制芳烃
11.PTA先进技术与生产装置优化
12.PX-PTA行业利润前景与期货市场运行情况

日程安排

2018年4月27日　周五

13:30-17:30　商务参观

2018年4月28日　周六

09:00-12:00　演讲报告
12:00-14:00　自助午餐与交流
14:00-18:00　演讲报告
18:00-20:00　招待晚宴

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Background

In 2017, the business climate of China's PET industry has rebounded and its profitability has been enhanced. The effective capacity reached 50Mt and the output of about 41Mt. In 2018, the consumption of China's PET will keep growing, and China's implementation of the policy on restricting the import of waste plastics will substantially reduce the import of recycled PET, which will bring more market space to primary PET. It is estimated that the demand growth of China's PET downstream will reach about 10% by 2018.

The increase of PET production drives the demand for PTA and PX. In 2017, the total PTA capacity of China is 47Mt, effective capacity is 36.4Mt. It is estimated that by 2018, the total capacity of PTA in China will reach 49.23Mt, the effective capacity will reach 46.28Mt and the operating rate will reach 90%. Correspondingly, the consumption of PX in China's PTA production will reach 27.5Mt.

Since 2017H2, the oil price rebounded, the price of Brent oil is expected to 65-70 $/bbl in 2018, will strongly support PX and PTA prices, it is also a huge challenge to the profitability of China's PX and PTA industries. Due to the driving force of sustainable development of China's Dacron, PET and PTA industries, the growth of global aromatics industry chain mainly concentrates in Northeast Asia. As China's strong demand but insufficient supply for PX, the net import of PX continues to increase, above 14Mt in 2017.

Under this background, it is an inevitable choice to build large-scale PX production plant with advanced technology and develop diversified sources of PX raw materials. With the construction boom of China's refining-chemical integration and the PX projects, the situation of China's massive import of PX will be reversed after 2020. At the same time, the R&D and application of new technologies, such as coal (methanol) to aromatics, toluene alkylation with methanol to PX, coal tar to aromatics, methane or syngas direct conversion to aromatics have made achievement.

China PX Industry Chain Technology & Market Forum 2018 will be held on April 28, 2018 in Chengdu, Sichuan, China. The conference will focus on China PET/PTA supply-demand and price outlook, PX-PTA industry technical optimization, profit outlook and futures market operation, prospects for aromatic capacity expansion in Asia and China, construction experience & technology selection of large aromatic project, PX technologies and cost competitiveness comparison for different raw materials, innovation and application of aromatics production enhancing technologies, etc.

Topics

1. China PET/PTA supply-demand and price outlook
2. Prospects for aromatic capacity expansion in Asia and China
3. New refining-chemical integration and aromatic projects planning
4. Analysis of reforming devices and PX capacity potential of Shandong local refineries
5. Construction experience & technology selection of large aromatic project
6. Development & operation practice of domestic aromatics processes
7. Technology updates & economic analysis of coal (methanol) to aromatics
8. Toluene alkylation with methanol to PX and industrial application
9. Enhancing PX yield technologies - toluene disproportionation, xylene isomerization and heavy aromatics to light aromatics
10. Diversified aromatic raw materials - coal tar to aromatics, methane or syngas direct conversion to aromatics
11. PTA advanced technology and process optimization
12. PX-PTA industry profit outlook and futures market operation

Preliminary Agenda

Apr.27, 2018	**Friday**
13:30~17:30	Industrial visiting
Apr.28, 2018	**Saturday**
09:00~12:00	Speech
12:00~14:00	Networking Lunch
14:00~18:00	Speech
18:00~20:00	Banquet