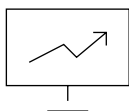


Company Strategies and Performance (CSP)

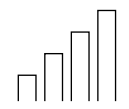
Access an in-depth comparative view of your position in the chemical and refining industries

Get the clearest possible view of your competitors' strategies and their effectiveness, for both the refining and chemical industries Company Strategies and Performance from S&P Global. Our global company profiles cover 70 of the key companies in the refining and chemical industries, providing financial benchmarking, and strategic positioning tools as well as expert insights.



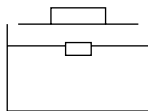
Performance Benchmarking

An assessment of each company by peer group on operational metrics such as asset portfolio, product integration, and proximity to market.



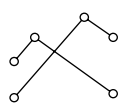
Product Level Financial Metrics

Quarterly financial performance benchmarking of EBITA, ROCE, Capex, capital employed, and revenue for each company and its peer group.



Global Company Profiles

Organizational, operational and portfolio structure; strategic and investment rationale; expansion and growth strategies of the top chemical producers and refiners.



Company Perspectives

Analytical reports of key events and trends in the refining and chemical competitive landscape.



How does S&P Global Company Strategies and Performance benefit you?

Strategic Planning

- Get insight on your competitor's operations, product integration, manufacturing position and strategic direction.
- Support short-term and long-term planning decisions with detailed analysis.
- Understand which strategies your competitors are employing to increase/decrease exposure.
- Rely on credible intelligence to screen for acquisition targets.
- Support analysis required by your leadership/management with an independent review.

Product Management

- Get insight on successful strategies in the current market environment.
- Benchmark your portfolio and compare revenue data.
- Monitor asset performance relative to your peers.

Investment Analysis

- Evaluate profitability of your product supply chain.
- Confirm investment decisions: what aspects of the portfolio are under/over performing.
- Validate investment plans using S&P Global proprietary data.

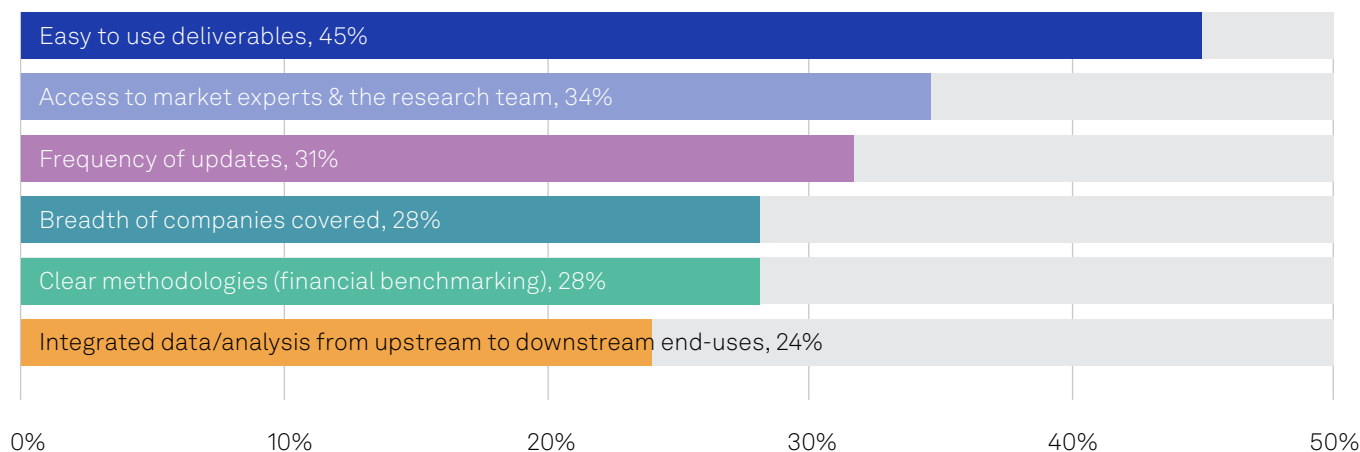
Competitive Intelligence

- Benchmark and assess competitor threats and opportunities.
- Understand capacity performance of competitors and peers.
- Get visibility on new technologies being employed and investment strategies.

Sales / Marketing

- Identify the product and regional opportunities for you to position your portfolio.
- Understand more about the successful strategies of your competitors.

What our clients value most



Crucial Context

The refining and petrochemical industries are characterized by uncertainty. In a pressured environment shaped by a complex set of market, regulatory, technological and economic forces, leading refiners, and chemical companies have become more focused on tactical and strategic portfolio management.

S&P Global Company Strategies and Performance provides on-going evaluation of company performance to help you better identify threats and opportunities. Our regional analysis adds vital perspectives on these movements.

Key Trend: Global Refinery — Petrochemical Integration

There are two main factors that influence the integration level in a region — feedstock availability and the demand growth of refinery and petrochemical products.

Key drivers for integration:

- Higher margins
- Increasing petrochemical demand
- Reliable feedstock supplies
- Strict environmental regulations
- Higher operational efficiencies

Companies Analyzed

AMERICAS

Chemicals

- Braskem
- ChevronPhillips
- Dow
- ExxonMobil Chemical
- LyondellBasell
- Occidental-Oxychem
- Olin
- Orbia
- Westlake Chemical

Refining

- Chevron
- Citgo
- Delek
- ExxonMobil
- HollyFrontier
- Cenovus
- Marathon
- PBF Energy
- Pemex
- Petrobras
- Phillips 66
- Suncor Energy
- Valero

EMEA

Chemicals

- BASF SE
- Borealis AG
- Sibur
- ENI
- Indorama Ventures
- Ineos
- QatarEnergy
- Shell
- SABIC
- Sasol
- Saudi Aramco
- TotalEnergies

Refining

- BP
- ENI
- KPC
- Lukoil
- MOL
- OMV
- PKN Orlen
- Repsol
- Shell
- Saudi Aramco
- TotalEnergies

APAC

Chemicals

- Asahi Glass Company (AGC Group)
- China National Salt Industries
- CNPC (PetroChina)
- Formosa
- Hengli Group
- LG Chem
- Lotte Group
- Mitsubishi
- Mitsui Chemicals
- PETRONAS
- PTT
- Reliance Industries
- Rongsheng Petrochemical
- Shin-Etsu
- Siam Cement Group (SCG)
- SINOPEC
- Sumitomo Chemical
- Wanhua Chemical
- Xinjiang Zhongtai Chemical

Refining

- Indian Oil
- JXTG
- Pertamina
- PetroChina
- PETRONAS
- Reliance
- SINOPEC
- SK Energy

About S&P Global Commodity Insights

At S&P Global Commodity Insights, our complete view of global energy and commodity markets enables our customers to make decisions with conviction and create long-term, sustainable value.

We're a trusted connector that brings together thought leaders, market participants, governments, and regulators, and we create solutions that lead to progress. Vital to navigating commodity markets, our coverage includes oil and gas, power, chemicals, metals, agriculture, shipping, and energy transition. Platt's® products and services, including the most significant benchmark price assessments in the physical commodity markets, are offered through S&P Global Commodity Insights.

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