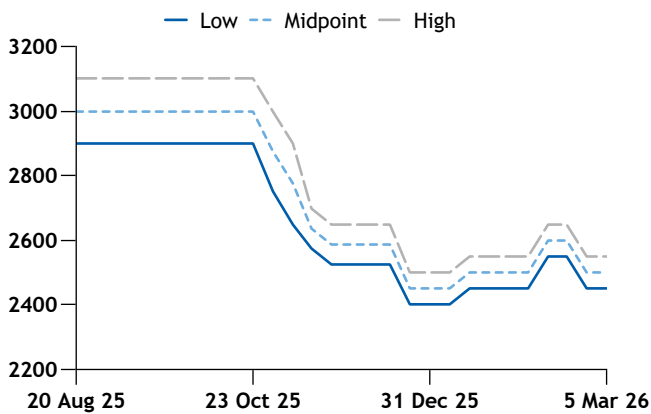


OUTLOOK

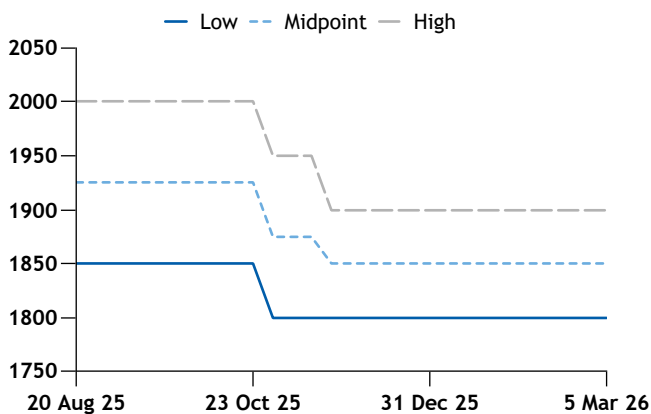
- Fresh conflict further dampens sentiment
- Export values expected to firm on rising freight
- China mid-cut values rise following LNY

HISTORICAL PRICING

C12-14 southeast Asia historical spot pricing \$/t



C16-18 southeast Asia historical spot pricing \$/t



CONTENTS

North America	2	Tropical oils	7
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Europe	6	Shipping & Logistics	9

PRICES

Southeast Asia spot averages						\$/t
	22 Jan	5 Feb	19 Feb	5 Mar	Average	
C8 fob	2,725	2,725	2,725	2,725	2,725	
C10 fob	2,625	2,625	2,625	2,625	2,625	
C12-14 fob	2,500	2,500	2,600	2,500.0	2,525	
C16-18 fob	1,850	1,850	1,850	1,850	1,850	
C16 fob	1,900	1,900	1,900	1,900	1,900	
C18 fob	1,825	1,825	1,825	1,825	1,825	

Southeast Asia spot price range					
	Δ	\$/t		Δ	€/lb
C8 fob	◀▶	2,600	2,850	◀▶	117.93 129.27
C10 fob	◀▶	2,500	2,750	◀▶	113.40 124.74
C12-14 fob	◀▶	2,450	2,550	◀▶	111.13 115.67
C16-18 fob	◀▶	1,800	1,900	◀▶	81.65 86.18
C16 fob	◀▶	1,850	1,950	◀▶	83.91 88.45
C18 fob	◀▶	1,750	1,900	◀▶	79.38 86.18

Prices are assessed on a weekly basis

US 1Q26 contract price range					
	Δ	€/lb		Δ	\$/t
C12-14; C12-16; C12-15 Mid-cut					
Del bulk	▼-25.00	135.00	155.00	▼-20.00	2,976 3,417
C16-18 30:70 blend					
Del bulk	▼-13.00	115.00	125.00	▼-15.00	2,535 2,756
C16-18 50:50 blend					
Del bulk	▼-13.00	118.00	128.00	▼-15.00	2,601 2,822
C18 straight cut					
Del bulk	▼-15.00	110.00	120.00	▼-12.00	2,425 2,646
C16 straight cut					
Del bulk	▼-10.00	128.00	138.00	▼-10.00	2,822 3,042

Mexico spot price range					
	Δ	\$/t		Δ	€/lb
C12-14 Mid cut					
cif Veracruz	◀▶	3,200	3,400	◀▶	145.15 154.22

China spot prices						\$/t
	30 Jan	6 Feb	13 Feb	20 Feb	27 Feb	
C12-14 ex-works	3,123	3,185	3,198	na	3,325	
C16-18 ex-works	1,857	1,873	1,881	na	1,910	

Northwest Europe spot prices						€/t
	Δ	Prices		Δ		
C12-14	◀▶	2,550	2,650	◀▶		
C16-18	◀▶	1,850	2,000	◀▶		

NORTH AMERICA

Mass balance premium

Mass balance premium for volume sold with certification is heard at 6.0-8.0 €/lb.

Truck freight from USGC to Midwest generally ranges 8.0-10.0 €/lb.

Truck freight from USGC to east coast generally ranges 8.0-12.0 €/lb.

Latest developments in the global market has increased uncertainty amongst oleochemicals market participants and further dampened sentiment in the US.

With global oil prices surging and stock markets plummeting following the US strikes in Iran, concerns that the war could now drag on has led many participants to sit on the sidelines while they assess the impact on the fatty alcohols market.

Concerns regarding future shipments from southeast Asia have again been brought to the fore, with vessel attacks and revoked ship insurance bringing ship traffic in the strait of Hormuz to a standstill with as many as 700 ships unable to leave the region, according to latest reports.

With demand persisting at low levels for some time in the US, there remains plenty of inventories in tanks since last year and suppliers continue to work through their stocks. Furthermore, with natural alcohol values remaining at higher levels compared to the synthetic alternative, sources note that many buyers are now also turning to the cheaper option wherever possible.

Vantage Specialty Chemicals' anti-dumping petition targeting fatty acid imports from Indonesia and Malaysia continues to divide the market.

Vantage's decision to proceed with the petition confused some in the market, as the company primarily produces tallow-based fatty acids. US production of palm-based fatty acids is minimal, which complicates supply dynamics, participants said. But US producers might support the decision because it could raise domestic fatty acids prices, other sources said.

Participants note they are awaiting the outcome of the US Department of Commerce meeting regarding the petition, which has now been delayed until April.

The uncertainty surrounding US import tariffs also continues to disrupt trade from southeast Asia, with conflicting expectations over whether tariff rates will fall from 19pc to 10pc after the cancelled emergency tariffs in the US. The US-Indonesia agreement and US-Malaysia deal has not been formally ratified, leaving buyers and sellers unclear on how palm oil and its derivatives will ultimately be treated.

In other news, the majority-conservative US Supreme Court has delivered a blow to the key plank of President Donald Trump's economic and foreign policy, invalidating

the broad tariffs he has imposed on nearly every US trading partner and prohibiting him from future exercise of emergency tariffs.

The Supreme Court's 6-3 ruling, released on 20 February, will block Trump's ability to use tariffs under the International Emergency Economic Powers Act (IEEPA) to extract concessions from trading partners and punish countries that reject his demands. The US Constitution "did not vest any part of the taxing power in the executive branch", chief justice John Roberts wrote in the majority opinion, which was backed by two other conservative justices and all three of the court's liberal justices.

Trump cited the IEEPA to impose targeted import taxes on China, Canada and Mexico, and separately in his "Liberation Day" action in April that resulted in tariffs of 10pc and higher on nearly every US trading partner. The Supreme Court's action also invalidates Trump's tariffs on Brazil, which he imposed in a pique over the jail sentence of former president Jair Bolsonaro. The decision will not affect tariffs on US imports of steel, aluminium, cars and auto parts, which Trump imposed by citing well-tested legal trade authorities.

The legal fight over an estimated \$175bn paid by US importers under President Donald Trump's now-cancelled emergency tariffs likely will head back to the US Court of International Trade.

The US Court of International Trade ruled in May 2025 that Trump's emergency tariffs were illegal, and the Supreme Court affirmed that decision on 20 February. The trade court at that time did not directly address the issue of processing refunds.

Trump and his key economic advisers have said they expect a years-long court fight over the refunds. Lawyers representing US importers and states cited those statements and said they would like the Court of International Trade to quickly order the Trump administration to establish and implement a process for granting tariff refunds.

The US had collected \$165bn in emergency tariffs as of January, but the total estimated refund bill would amount to \$175bn, according to economists at the University of Pennsylvania Wharton School. The Customs and Border Patrol (CBP) agency stopped collecting emergency tariffs on 3 February. More than 900 importers have already petitioned US courts to order refunds, including refiners Valero and Marathon Petroleum.

US retailers, automakers and other merchants have previously said they were absorbing the cost of some of the tariffs in anticipation of a potential ruling striking them

NORTH AMERICA (CONTINUED)

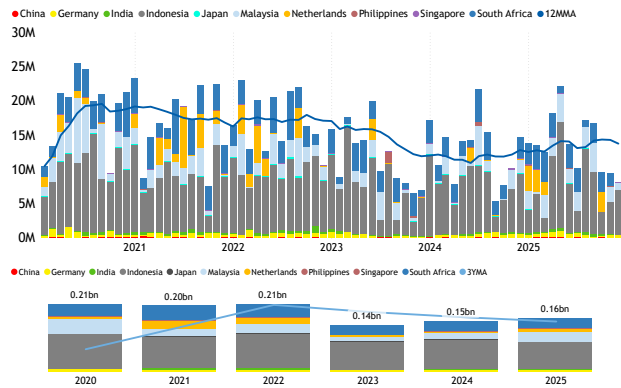
down, while also raising prices to cover their additional costs. But it is unlikely that merchants receiving refunds will directly pass those savings along to customers that already paid inflated prices.

US rail costs are currently discussed at about 6-8¢/lb, depending on destination, with truck costs at about a 2-4¢/lb premium over rail.

The mass balance (MB) premium range is approximately 6-8¢/lb as the common spread. The range is flexible depending upon market input and subject to change going forward at such time as change is evident.

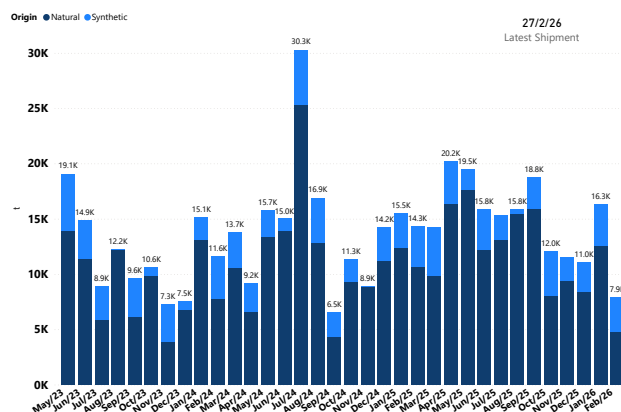
The import graph shows December imports are at the lowest levels seen during 2025, with the bulk shipped from Indonesia, according to Global Trade Tracker.

US fatty alcohol import volume by country of origin t



According to Argus Trade Monitor, which tracks bill of lading data, around 8,000t of mostly natural fatty alcohols were imported to the US by 27 February.

US natural and synthetic fatty alcohol imports t

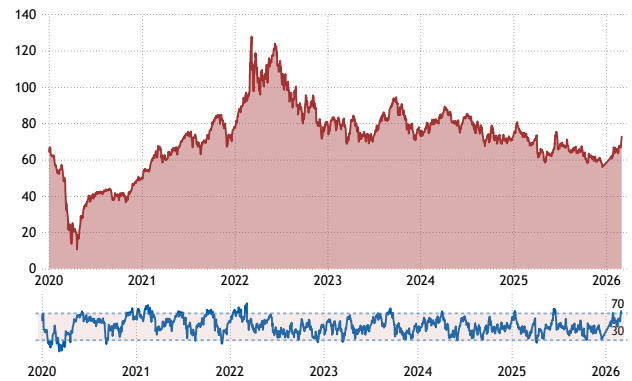


Mont Belvieu Ethane & Ethylene

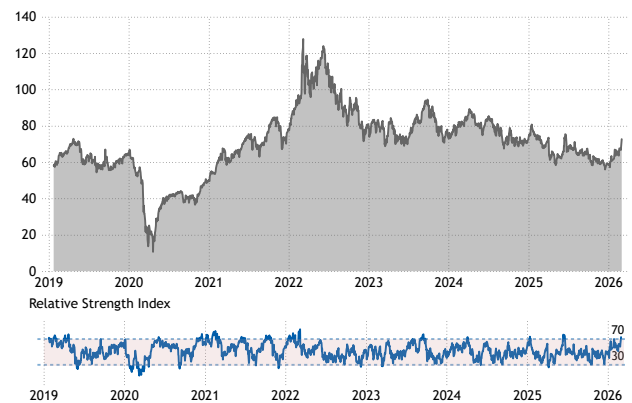
The February US ethylene contract settled flat at 30.25¢/lb, despite moderately lower ethane feedstock costs and ethylene spot prices.

Ethane, which comprises roughly 80pc of US Gulf coast's ethylene's feedslate, had its average monthly price decline from 23.57¢/USG in January to 22.74¢/USG in February, according to Argus data. The US ethylene contract is a 50:50 industry formula comprised of the 45-day volume weighted average (VWA) of US Gulf coast ethylene deals and weighted average of feedstock costs by usage.

ICE Mont Belvieu ethane pricing ¢/USG



Ethylene pipeline choctaw pricing ¢/lb

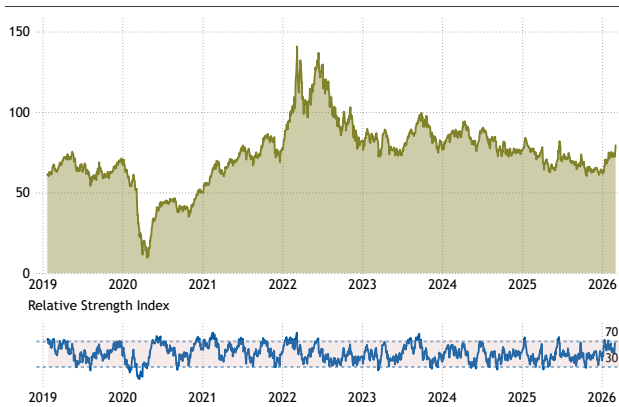


NORTH AMERICA (CONTINUED)

Upstream oil and gas

Brent crude oil futures

\$/bl



Mexico

Mexican mid-cut fatty alcohol values are holding steady, in line with levels seen in the US.

Mexico's economy recorded modest growth in 2025, but it was below the level required for the country's development. Official data from the Instituto Nacional de Estadística y Geografía show that GDP expanded by around 0.8pc, reflecting limited momentum in key productive sectors.

Finance officials acknowledged that, while the economy avoided contraction, the pace of expansion was insufficient to generate stronger employment, investment, and income growth.

Despite the weak performance, growth remained within the federal government's projected range for 2025. Authorities have expressed confidence that economic activity could improve in 2026, supported by higher investment, near-shoring opportunities, and greater integration into regional supply chains.

ASIA

Uncertainties across the global market continues to stall activity in Asia, with participants noting that since the onset of the US-Iran conflict there remains confusion over fatty alcohols pricing. Owing to the lack of business in the market, prices have been assessed stable. Sources anticipate that values will increase over the coming weeks owing to the firmer freight rates that are now being quoted.

In feedstock markets, crude palm oil (CPO) futures prices have climbed higher, driven by escalation in the US-Iran conflict. May CPO futures on the Bursa Malaysia Exchange rose by 3pc from the previous 16:30 Singapore close to 4,147 ringgit/t (\$1,054/t) on 2 March, while May soybean oil futures on the Dalian Commodity Exchange also rose by 34 yuan/t on the session to close at Yn8,260/t (\$1,200/t), maintaining a premium over CPO. CPO prices have been further supported by higher palm oil export levies that Indonesia announced on 1 March.

Shipbrokers said biofuels and palm oil fixtures have not been materially affected by the conflict in the Middle East so far.

Although there are disruptions to shipping through the strait of Hormuz and major protection and indemnity (P&I) clubs have canceled war risk coverage in the region, most Asia-Europe shipments had already rerouted around the Cape of Good Hope because of Houthi attacks in the Red Sea since late 2023.

But brokers expect freight rates to increase for oil prod-

ucts and chemical tankers across the market, which could pressure buying interest on a fob-basis in Asia-Pacific, and narrow arbitrage opportunities.

In other news, Indonesian conglomerate Golden Agri-Resources' (GAR) production yield of palm fruit rose in 2025 from a year earlier, in part because of production capacity growth in existing plantations, it said on 26 February.

The company's palm fruit yield rose by 2pc in 2025, totalling 9.2mn t, or 19t/hectare (ha) of the area planted, it said in a statement. The company's planted area stood at 531,000ha in 2025, with an additional 16,800ha of old plantations that were revamped for higher-yielding planting materials.

The company's overall supply is expected to remain constrained because of the aging plantations, but it has implemented yield-intensification projects as part of plans to sustain long-term production growth from existing planted areas, it said.

The increased output partly supported the company's revenue and net profit during the year because the prices of CPO and palm kernel products also rose.

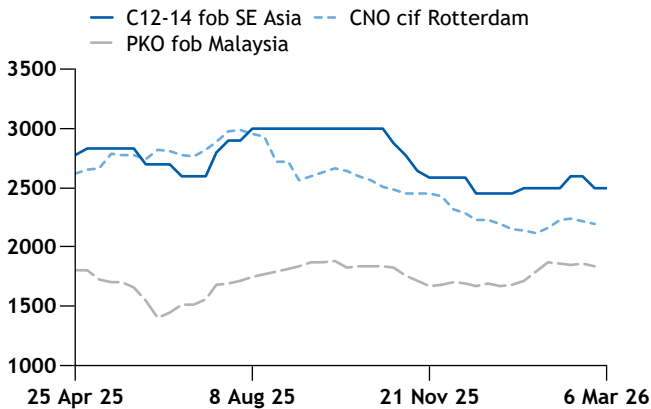
Long-term demand fundamentals for palm products appears to be firm, supported by global population and per capita GDP growth as well as the rising renewable energy demand, GAR said. This also comes as a wave of renewable energy policies not just in Indonesia, but globally, driving a switch from traditional power generation fuels such as coal

ASIA (CONTINUED)

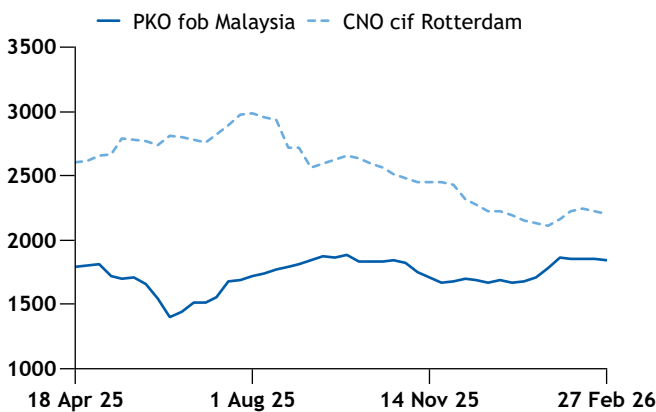
to renewable sources like biomass.

But industry volatility could persist on looming geopolitical uncertainties and shifts in global trade policies, it added.

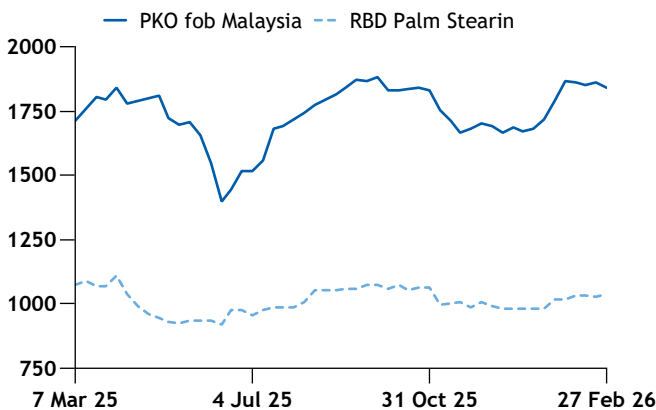
CNO & PKO vs C12:14 \$/t



CNO vs PKO, weekly average \$/t



RBD palm stearin vs PKO, weekly average \$/t



Weather in key production regions

In Indonesia, parts of Kalimantan and Sulawesi, two of the country's largest palm oil producing provinces, have been affected by severe flooding, according to the country's national disaster mitigation agency.

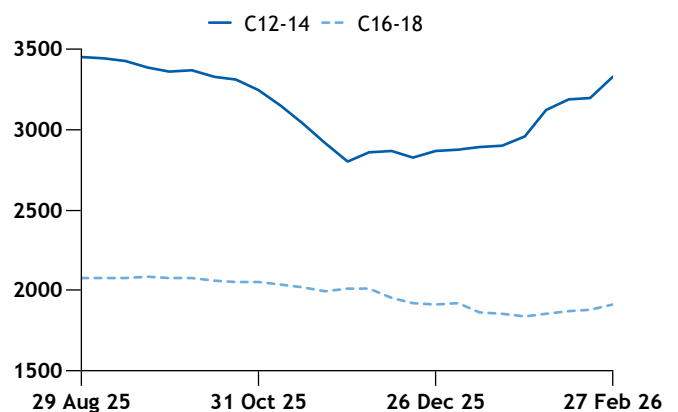
Latest assessments of the El Niño-Southern Oscillation (ENSO) indicate a return to neutral ENSO conditions later this month or at the beginning of the second quarter, according to the Australian Bureau of Meteorology (BoM). The Bureau's model currently predicts that tropical Pacific Ocean temperatures are likely to continue warming, with some models suggesting the possibility of El Niño development from June. But the BoM said it should be noted that this is a very long lead time for such a prediction, and forecasts beyond the second quarter are highly uncertain.

China

Mid-cut fatty alcohols values picked up in China with participants returning from the Lunar New Year break. Sources note that demand from the downstream industries has recovered faster than expected, with some buyers looking to add to their inventories. C12-C14 values were offered higher on firming palm kernel oil (PKO) values and increased to 22,800 yuan per metric ton (Yn/t) exw northeast China.

C16-18 fatty alcohols edged higher to Yn13,100/t exw northeast China on firming palm oil values, but with demand for this grade not as strong, the long chain grade did not see the same level of increases.

China select fatty alcohols, weekly average prices \$/t



ASIA (CONTINUED)

India

India's palm oil imports rose sharply on the month in January, on strong demand for crude supplies because refiners continued to prioritise CPO over refined products, according to the Solvent Extractors' Association of India.

India imported 766,400t of crude and refined palm oil in January, up from 507,200t in December and well above the 349,800t in January 2025. Palm oil products accounted for 58pc of the country's edible oil imports in January, compared with 37pc in December. Palm oil's higher share in India's import mix came from higher CPO arrivals, because refiners preferred to book crude oils given their lower im-

port duties compared with refined oils.

Malaysia and Indonesia remained India's main palm oil suppliers. India imported 831,800t of CPO from Malaysia in November-January, and 724,900t from Indonesia, alongside small volumes of refined, bleached, and deodorised (RBD) palm olein. Higher CPO arrivals pushed India's quarterly palm oil imports up to 1.91mn t in November-January, an 18pc increase from 1.62mn t a year earlier.

India's total vegetable oil imports in November-January were up by 1pc on the year to 3.96mn t, despite January's strong palm oil inflows.

EUROPE

Fatty alcohols spot prices are holding steady in the region, with uncertainties across the global market deterring buyers from making purchases for the time being.

Meanwhile, European ethylene oxide (EO) and derivatives market participants are assessing the potential fallout from the escalating conflict in the Middle East, as heightened security risks in the strait of Hormuz threaten to disrupt trade flows.

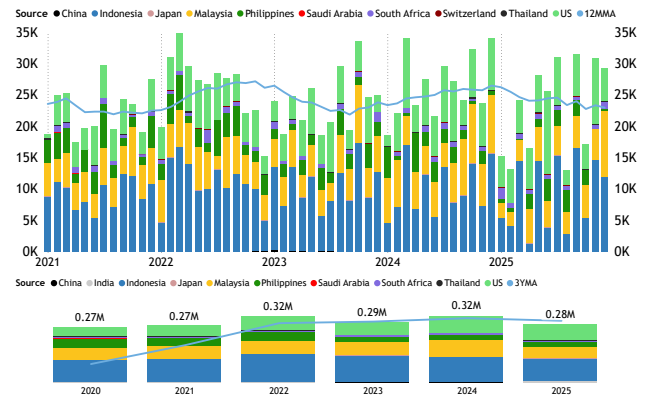
Most vessel owners are unwilling to transit the strait — a key chokepoint for petrochemicals exports from the Mideast Gulf. A prolonged conflict could interrupt supply from Saudi Arabia's east coast facilities, which host all of the country's purified EO derivatives and most of its ethylene glycols capacity. Saudi west coast producers could face higher freight costs.

European EO derivatives markets are generally well-supplied, but importers have been trying to manage inventories carefully to avoid oversupply in a weak-demand environment. Any delays to contractual shipments could tighten short-term availability.

European EO derivatives producers have been operating at reduced rates and could increase output, but firmer upstream crude and naphtha prices mean sales prices would have to rise significantly to justify a ramp-up.

The following graph shows import statistics for the EU at Rotterdam. December saw around 29,000t of fatty alcohols imported, with equal volumes shipped from Indonesia and Malaysia.

EU Fatty alcohols imports from outside Europe t



Argus EO and Derivatives

Key regional prices, detailed analysis and global industry news for ethylene oxide and its derivatives, delivered on a weekly basis.

Find out more >

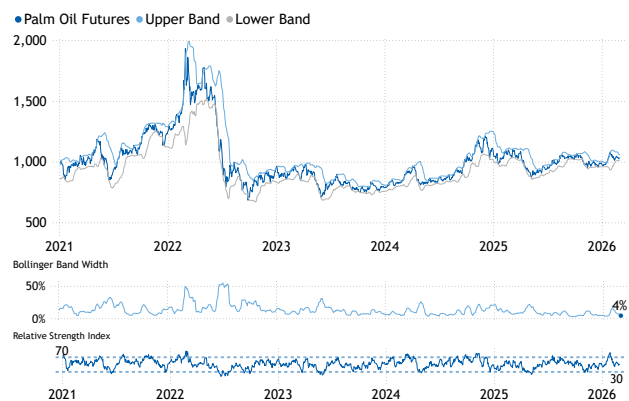
TROPICAL OILS

Tropical and key edible oils weekly pricing				\$/t
	3 Jan 25	20 Feb 26	27 Feb 26	Weekly trend
Fats and greases				
Crude palm oil fob Malaysia	1,073	1,038.60	1,031.86	▼
Crude palm kernel oil fob Malaysia	1,763	1,859	1,842	▼
Coconut oil cif Rotterdam	1,980	2,222	2,199	▼
RBD palm olein fob Malaysia	1,125	1,078	1,078	◀▶
Palm fatty acid distillate fob Malaysia	970	1,025	1,025	◀▶
RBD palm stearin fob Malaysia	1,115	1,030	1,039	▲
Rapeseed oil fob Dutch mill	1,114	1,277	1,286	▲
Soybean oil futures CBOT	872	1,287	1,329	▲
Bleached fancy tallow del Chicago	956	1,262	1,277	▲
Fats and greases				
Used cooking oil cif ARA	1,060	1,095	1,083	▼
Used cooking oil fob China bulk	978	1,104*	1,105	▲

* the previous week is displayed when no trades occur

Tropical and key edible oils daily pricing				
Ticker	Description	Exchange	Date	Price
FCPO1!	Palm oil futures ringgit/t	MYX	3 Mar	4,063.00
FCPO1!	Palm oil futures \$/t	MYX	3 Mar	1,030.54
ZL1!	Soybean oil futures \$/t	CBOT	3 Mar	1,372.60

Palm oil futures \$/t



Usual interpretation and usage of the RSI are that values of 70 or above indicate that a security is becoming overbought or overvalued and may be primed for a trend reversal or corrective pullback in price. An RSI reading of 30 or below indicates an oversold or undervalued condition.

Bollinger Band Width percentage illustrates volatility in percentage terms. The higher the value, the greater the recent percentage price swings in a commodity or stock.

Palm taxation

During March 2026, Malaysia's CPO exports will be subject to a 9pc duty, as the country's CPO reference price moved only slightly higher for the month. The change is not enough to trigger a change in the levies rate. The CPO reference price used to set the duty rose to 3,896.09 ringgit/t (\$987/t) in March 2026, up from 3,846.84 ringgit/t in February, according to the country's palm oil board.

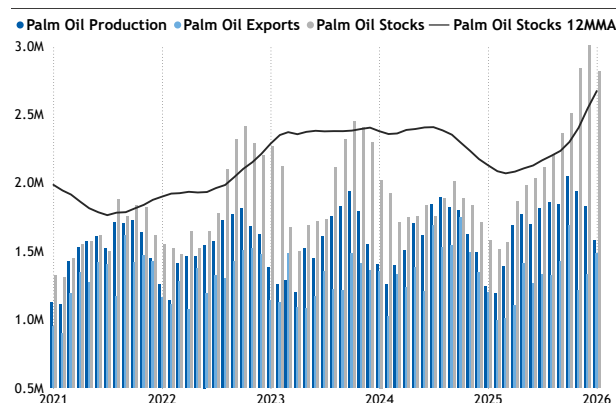
Indonesia's CPO exports will be subject to a \$112.66/t levy and a \$124/t duty until the end of March as per the current export levy structure. Indonesia raised export levies by 2.5pc across all export groups on 1 March. The Indonesian CPO reference price moved slightly up to \$938.87/t in February, from \$918.47/t the previous month.

MPOB

Malaysia's palm oil stocks fell in January 2026 after hitting a seven-year high, according to preliminary data from the Malaysian palm oil board (MPOB).

Total palm oil stocks in January fell by 8pc on the month to 2.82mn t, although this remained 78pc higher than a year earlier. CPO stocks fell by 8pc on the month to 1.67mn t, while processed palm oil stocks fell by 7pc on the month to 1.14mn t, resulting in lower overall stocks going into February.

Malaysia palm oil production, exports, stocks t



Market participants closely track Malaysia's palm oil stocks to gauge demand and supply dynamics because its monthly palm oil data releases are considered more reliable than Indonesia's. Malaysia is the world's second-largest palm oil producer after Indonesia.

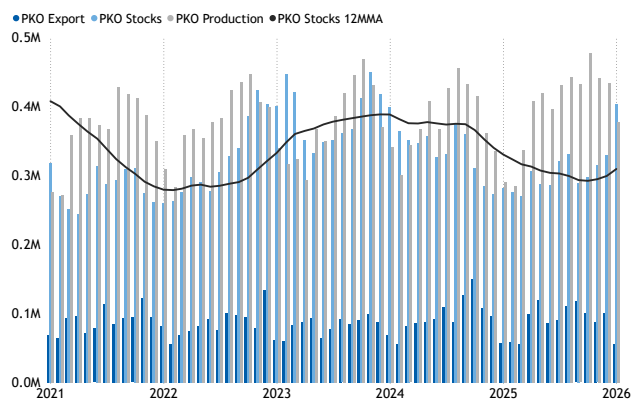
Malaysian palm oil product exports rose by 11pc from December 2025 to 1.48mn t in January. Biodiesel exports were flat from a month earlier at 18,776t in January, though

TROPICAL OILS (CONTINUED)

volumes were 44pc lower than in the same month last year. Meanwhile, oleochemical exports declined by 22pc from December to 223,114t.

CPO production was 1.58mn t in January, up by 27pc from a year earlier, but 14pc lower than in December. Palm kernel oil (PKO) production volumes fell by 57,136t from December 2025 to 377,480t in January 2026, while crude PKO production fell by 12,158t to 197,680t.

Malaysia palm kernel oil production, exports, stocks t



GAPKI

Indonesian palm oil stocks fell in October as higher domestic consumption and exports outweighed an increase in production, according to data from the Indonesian palm oil association (Gapki).

Palm oil stocks dropped by 10pc on the month to 2.3mn t in October, the data show.

ECONOMIC VIEW

The US launched an attack on Iran on 28 February, creating uncertainty globally. The conflict has spread to the wider Middle East and has instantly impacted on the global economy, causing the closure of the world's busiest international airport, Dubai International Airport, as well as a spike in oil prices.

It has been four years since Russia first attacked Ukraine, and the conflict continues to significantly impact Europe's economy with high energy costs. The new conflict in the Middle East and resulting instability also pose broader global risks, potentially affecting many economies and contributing to rising inflation worldwide.

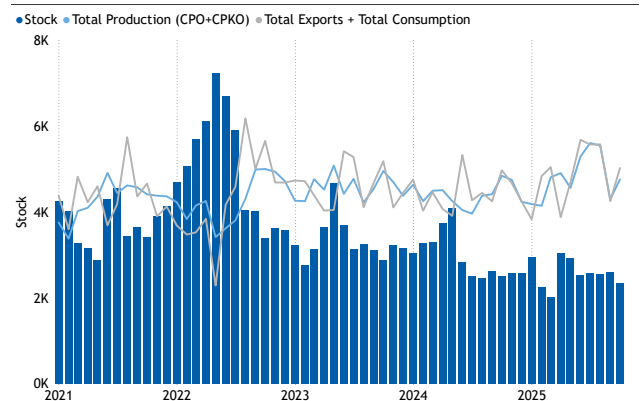
Separately, the US Supreme Court ruled that President Donald Trump's tariffs imposed on almost all the country's trading partners were illegal. Trump employed tariffs to extract concessions from US trading partners after taking

Palm oil production in the country rose by 11pc on the month to 4.6mn t in October but was 2pc lower on the year. CPO output fell by 2pc to 4.4mn t compared with a year earlier, while crude PKO output declined by 4pc to 405,000t over the same period.

Total exports of palm oil products dipped by 3pc from a year earlier to 2.8mn t in October. Oleochemical exports firmed by 43pc to 506,000t, while all other exported palm oil products fell compared with the same month in 2024.

Indonesia's domestic consumption of palm oil rose by 7pc year on year to 2.2mnt. The amount of palm oil used for biodiesel increased by 14pc on the year to 1.2mn t in October as Indonesia transitioned to a higher 40pc biodiesel-fossil diesel blend mandate in 2025, up from 35pc in 2024.

Indonesia palm oil production, exports, stocks '000t



office for his second term.

The Supreme Court, in a 6-3 decision, curtailed Trump's ability to use the International Emergency Economic Powers Act (IEEPA) to pressure trade partners or penalise countries that refuse his terms. The US Constitution does not grant any portion of the taxing authority to the executive branch, Chief Justice John Roberts, writing for the majority, said.

Trump used the IEEPA to levy targeted tariffs on countries such as China, Canada and Mexico, and also during his April "Liberation Day" initiative, which placed tariffs of 10pc or more on almost every US trading partner.

These developments highlight an increasingly fragile global economic landscape, where geopolitical conflicts and policy shifts are intensifying uncertainty. Markets are entering a period where volatility may become the norm, with wars in the Middle East and Europe disrupting energy flows,

ECONOMIC VIEW (CONTINUED)

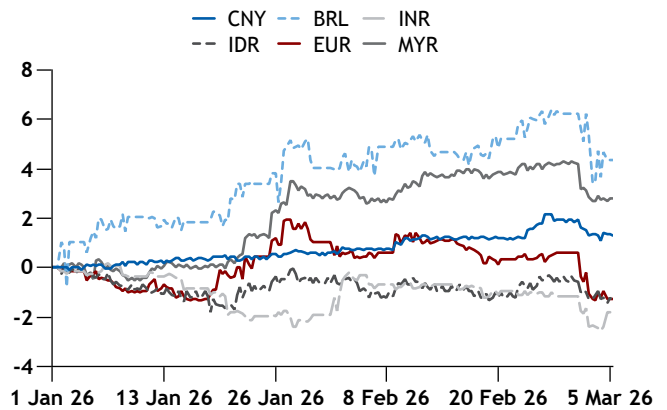
trade routes and investor confidence, and with the US recalibrating its trade authority after the Supreme Court’s ruling.

Currency

The US dollar continued to rally, as the widening conflict in the Middle East resulted in the greenback solidifying its status as a global safe-haven.

The Dollar Index, which tracks the greenback against a basket of six other currencies, traded 1pc higher to 99.34 on 3 March, its highest level since January.

Key oleochemical currencies’ performance vs \$ ±%YTD



SHIPPING AND LOGISTICS

Major protection and indemnity (P&I) clubs’ re-insurers will cancel war risk coverage in certain areas of the Mideast Gulf and the Gulf of Oman, according to notices issued to their members.

These clubs include the London P&I, UK-based Steamship Mutual Underwriting Association, American P&I, Norway-based Gard and the Swedish Club. This comes after Oslo-based marine insurance provider Skuld and UK-based NorthStandard P&I cancelled war risk coverage for areas in the Mideast Gulf and the Gulf of Oman.

Iran claims it has “closed” the strait of Hormuz connecting the Mideast Gulf and Gulf of Oman and intends to burn any ship that tries to pass through. Most P&I clubs have refused to issue insurance for vessel transits through the strait.

The Joint Maritime Information Center (JMIC) has raised the threat level in the strait of Hormuz to “critical” as a result of several attacks on commercial vessels following an escalation in the US-Iran conflict.

The JMIC raised the threat level to critical on 1 March after three ships were damaged by missile and drone attacks in the Gulf of Oman, Musandam and UAE coastal waters.

The Norwegian Maritime Authority also increased the maritime security level to MARSEC/ISPS-level 3 – its highest – in the Mideast Gulf, the strait of Hormuz and Gulf of Oman.

Meanwhile, clean long range (LR) and medium range (MR) freight rates in the Mideast Gulf rose sharply on 4 March compared with pre-conflict levels on 27 February, driven by mounting fears and sustained geopolitical friction between the US and Iran.

With rising tensions keeping vessels at anchor and dis-

couraging fresh arrivals, ship operators have little appetite for navigating the narrow chokepoint. Hundreds of tankers remain effectively trapped, waiting for a safe window to exit on escalating security concerns.

Cross-Mideast Gulf MR rates excluding and including the Hormuz transit reached their highest recorded levels, jumping to \$1mn and \$1.025mn respectively on 4 March, compared with pre-conflict levels of \$375,000 and \$400,000 on 27 February, shipbrokers said.

Fatty Alcohols Trade Explorer

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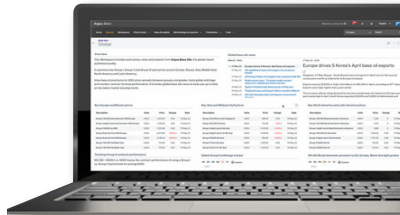


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