

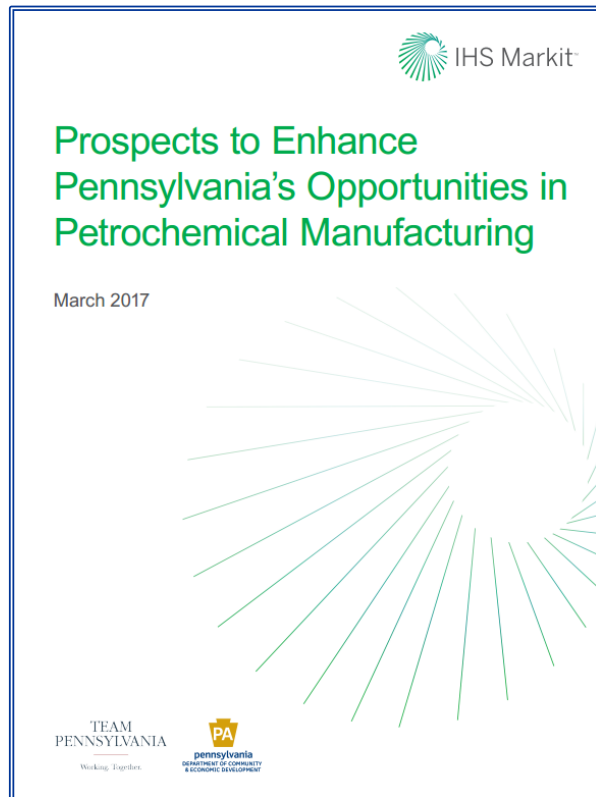
Pennsylvania
WORK SMART. LIVE HAPPY.

Case Study:
Shell's Investment in Pennsylvania
Giving Boost to Global Value Chain

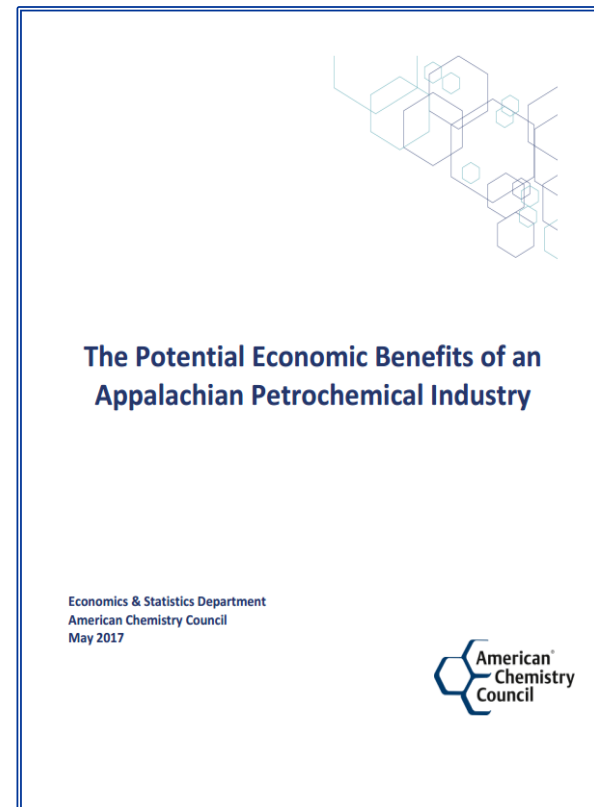
February 22, 2018



BACKGROUND

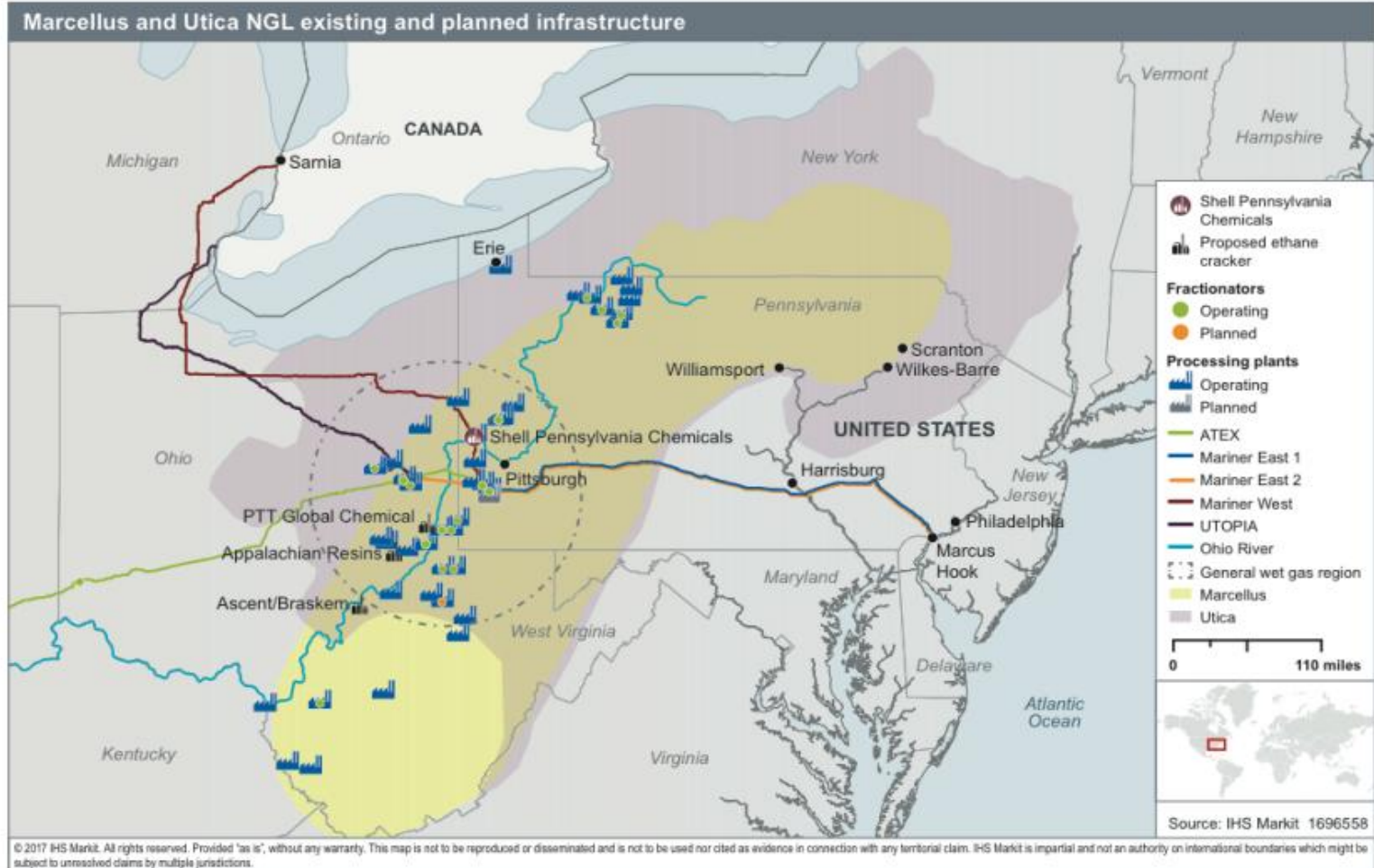


IHS Markit, March 2017



American Chemistry Council, May 2017

THE NEW LANDSCAPE

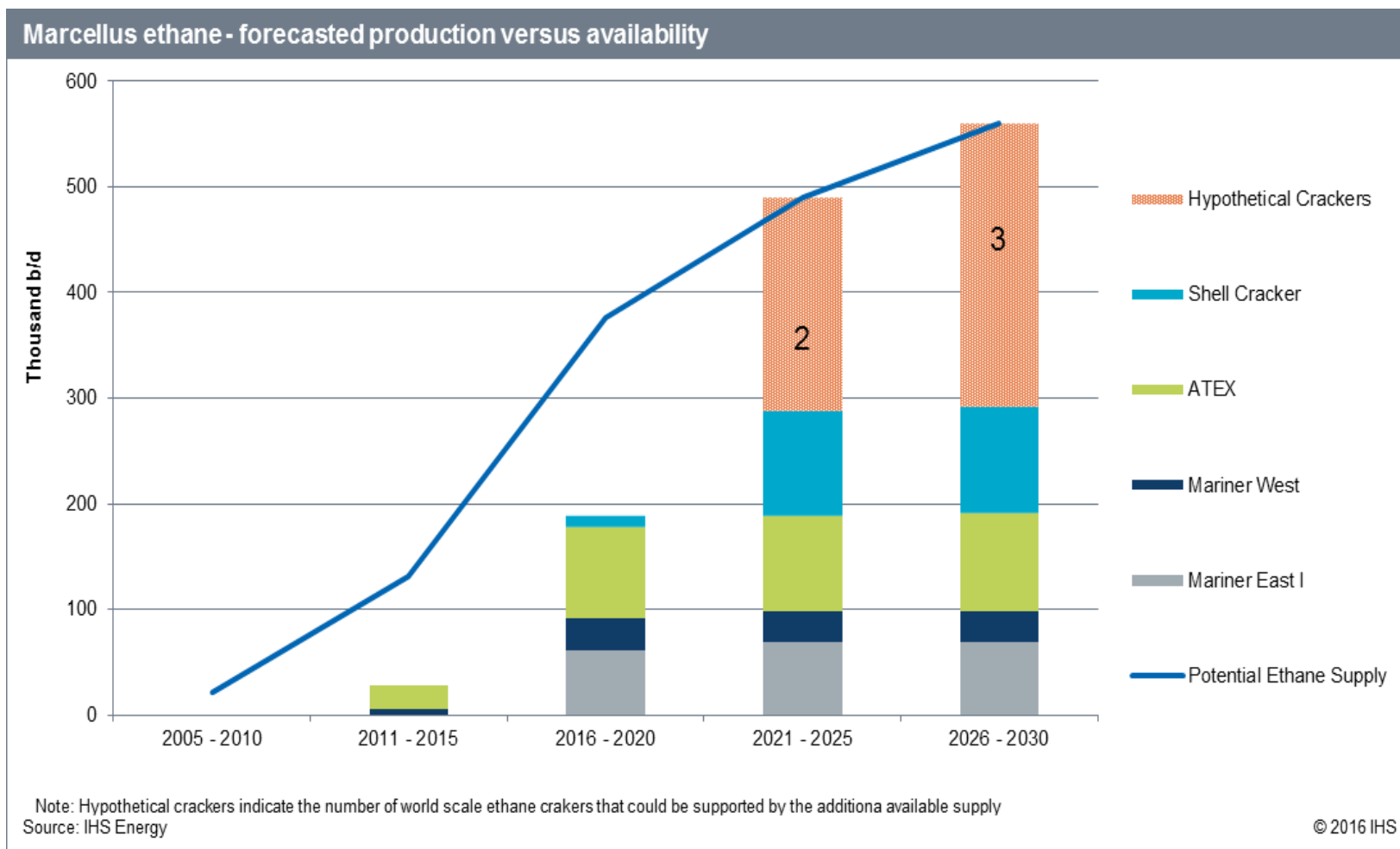


SHELL PENNSYLVANIA CHEMICALS



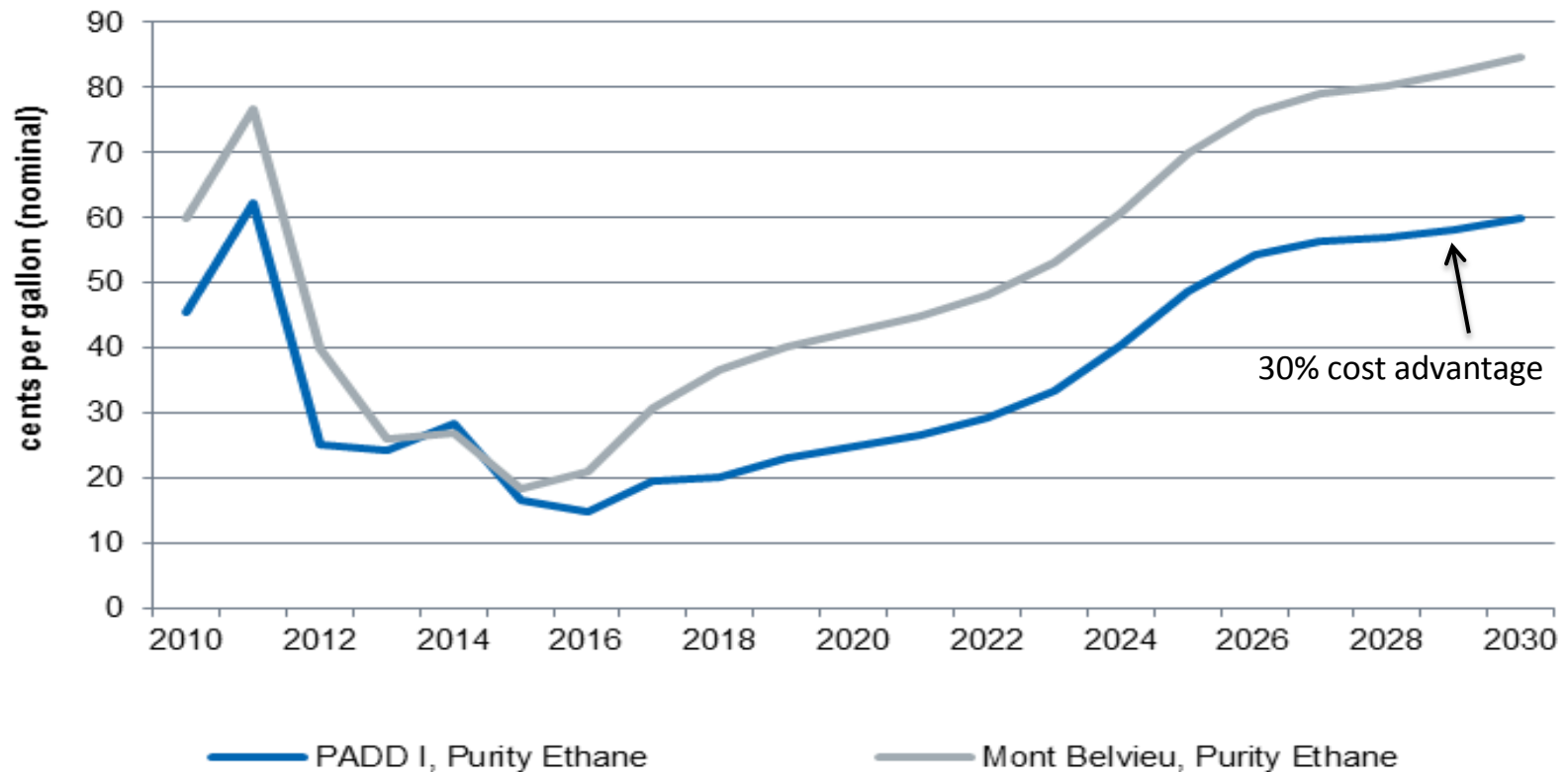
- One ethane cracker with an approximate annual average capacity of **3.3 billion pounds of ethylene**
- Three polyethylene units with a combined annual production capacity of approximately **3.5 billion pounds of HDPE and LLDPE**

ETHANE AVAILABILITY



COST ADVANTAGE

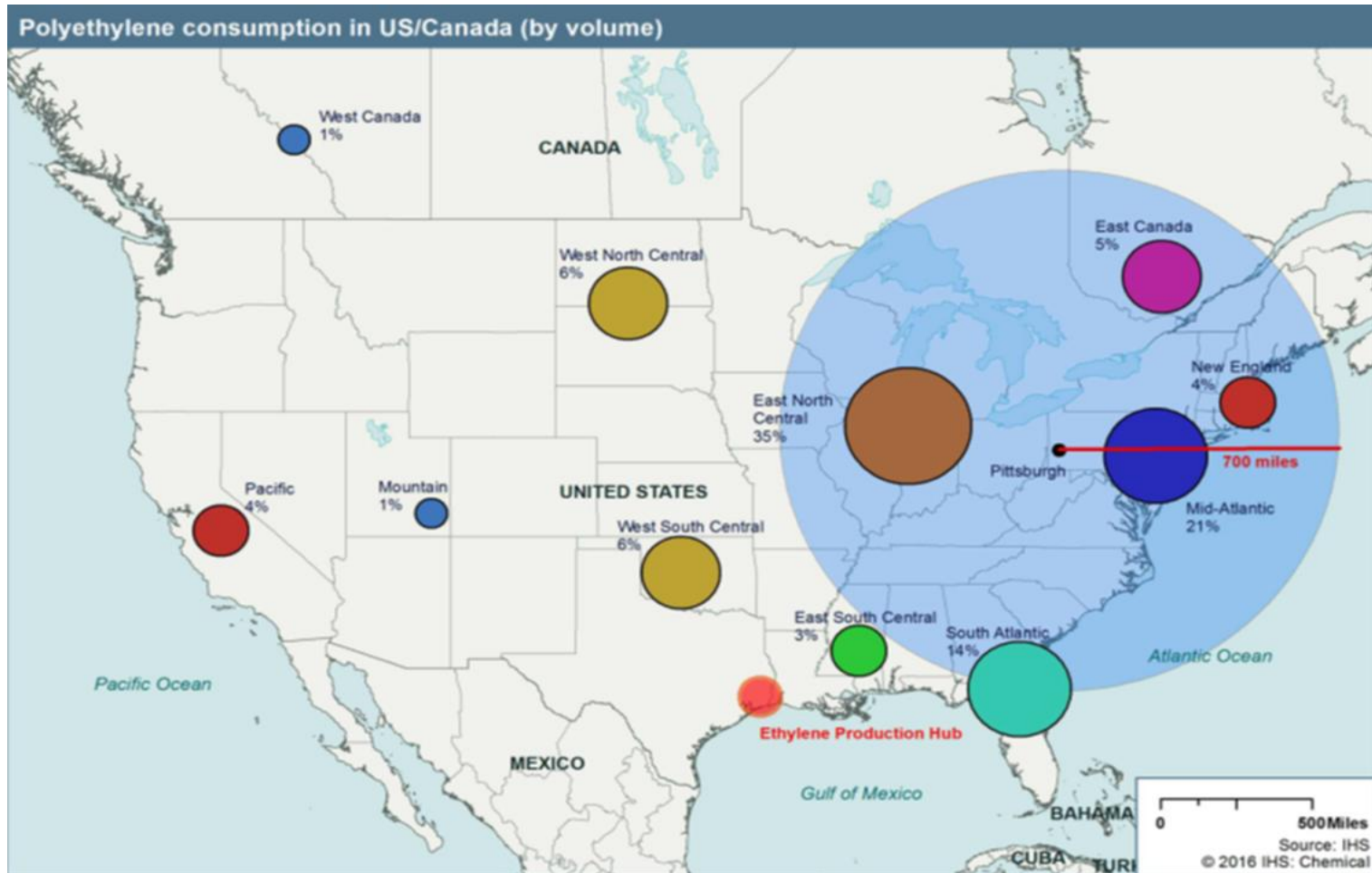
PADD I and Mont Belvieu ethane price comparison



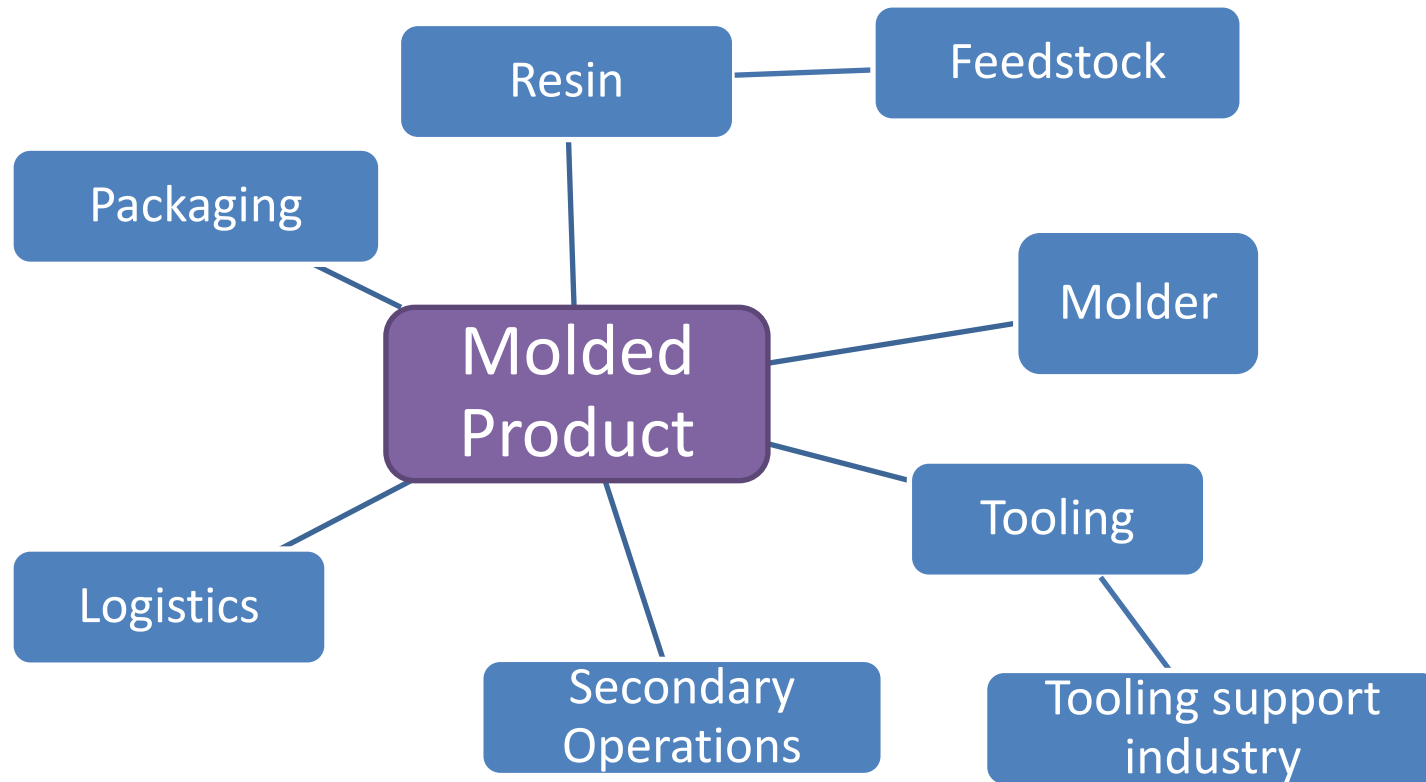
Source: IHS Energy

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POLYETHYLENE (PE) CONSUMPTION



WHAT GOES INTO PE CONSUMPTION



OBJECTIVES TO GROW SUPPLY CHAIN

Build a world class petrochemical hub with:

- 3-5 ethane crackers
- 3-5 PDH plants
- 2-3 ammonia plants
- Inorganic chemical plants
- Specialty plastics manufacturing



Drives growth of
small to medium
enterprises

Pennsylvania

WORK SMART. LIVE HAPPY.

Thank you!

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