



# The European Chemical Industry in 2013

## *Facts, Figures, Challenges*

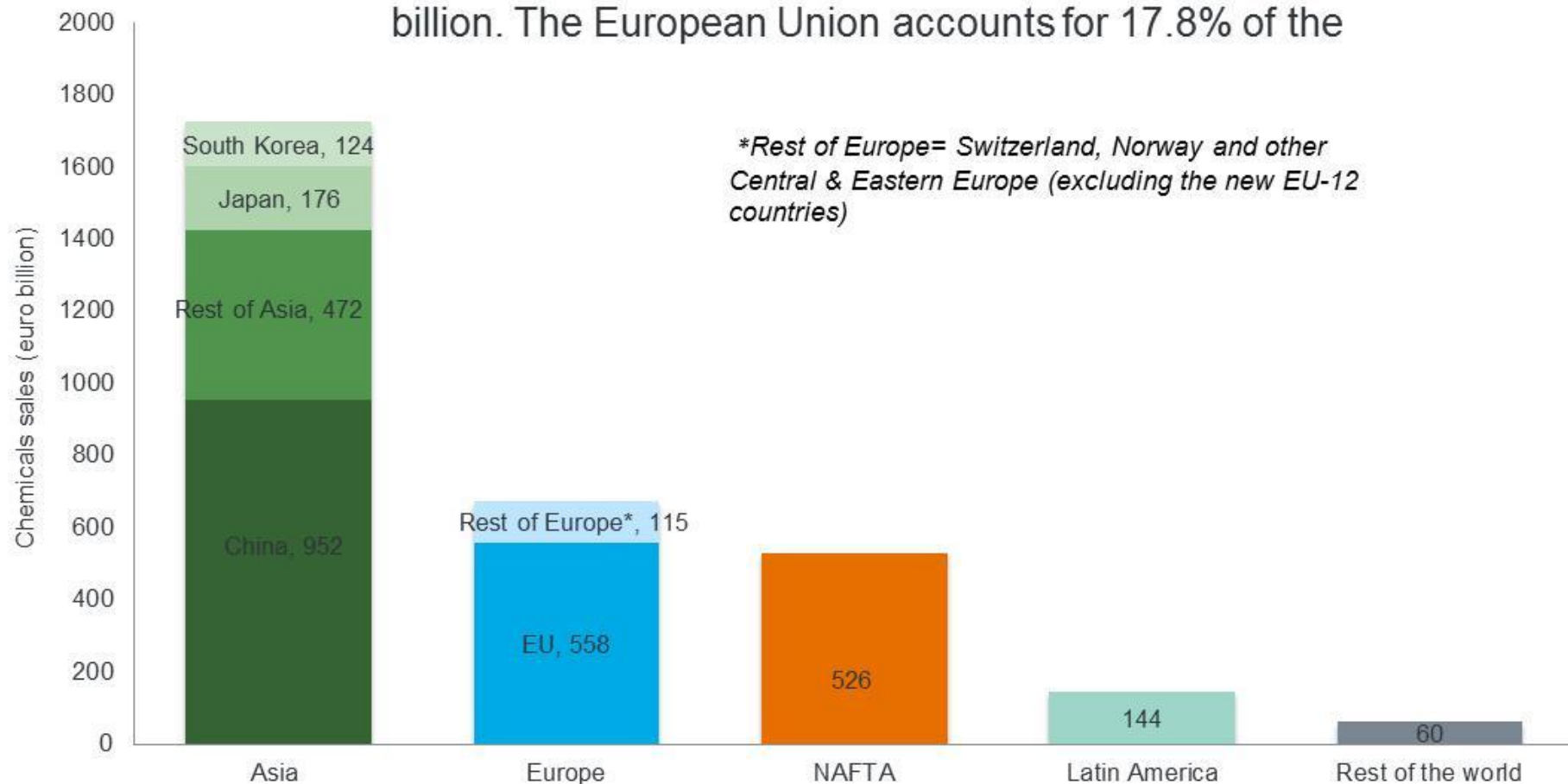


Vienna, October 10  
H. Mandery

# Asian chemical production surpassed that of the rest of the world



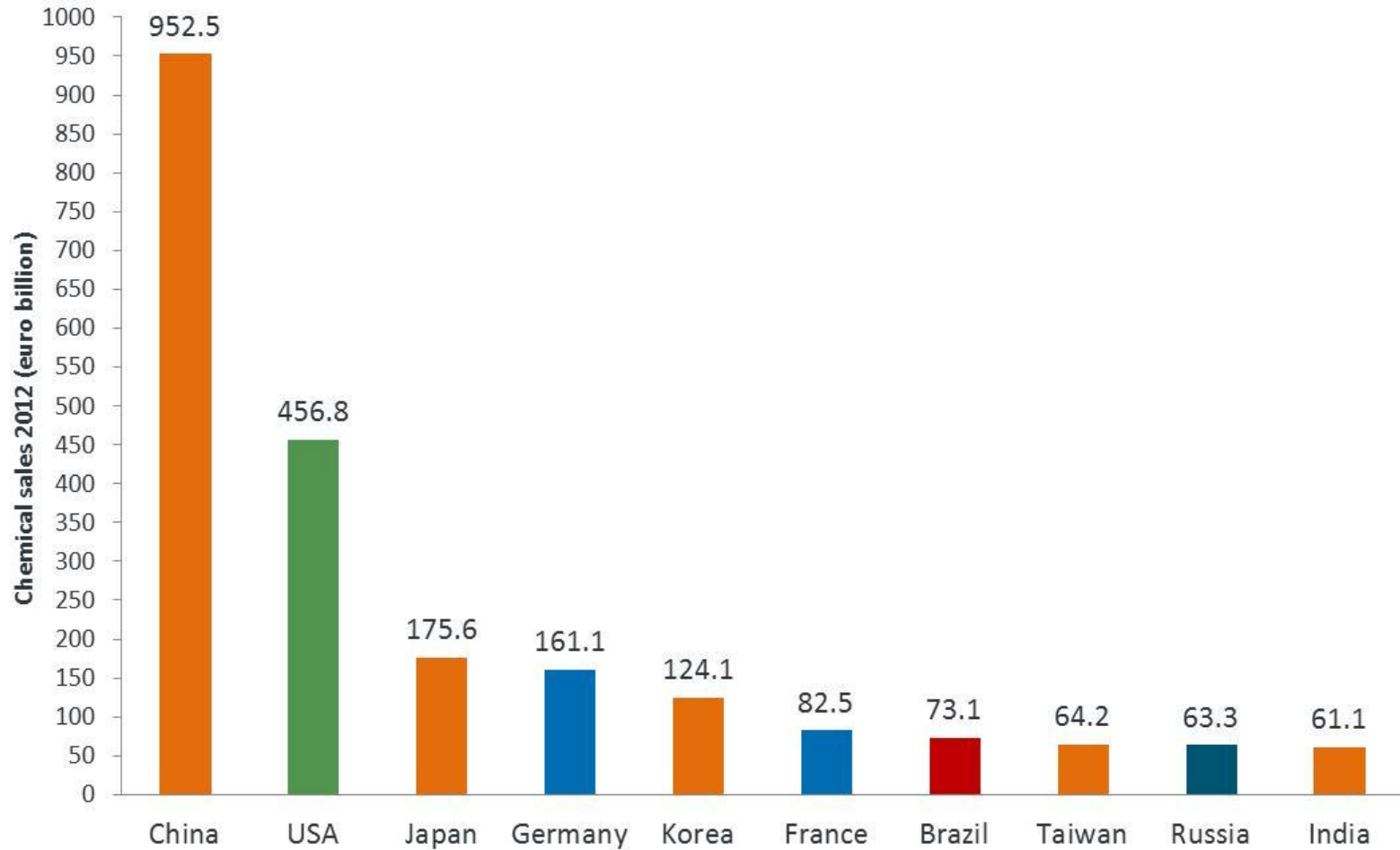
World chemicals sales in 2012 are valued at € 3127 billion. The European Union accounts for 17.8% of the



*\*Rest of Europe= Switzerland, Norway and other Central & Eastern Europe (excluding the new EU-12 countries)*

**Source:** Cefic Chemdata International

# China – by far the biggest chemicals producer

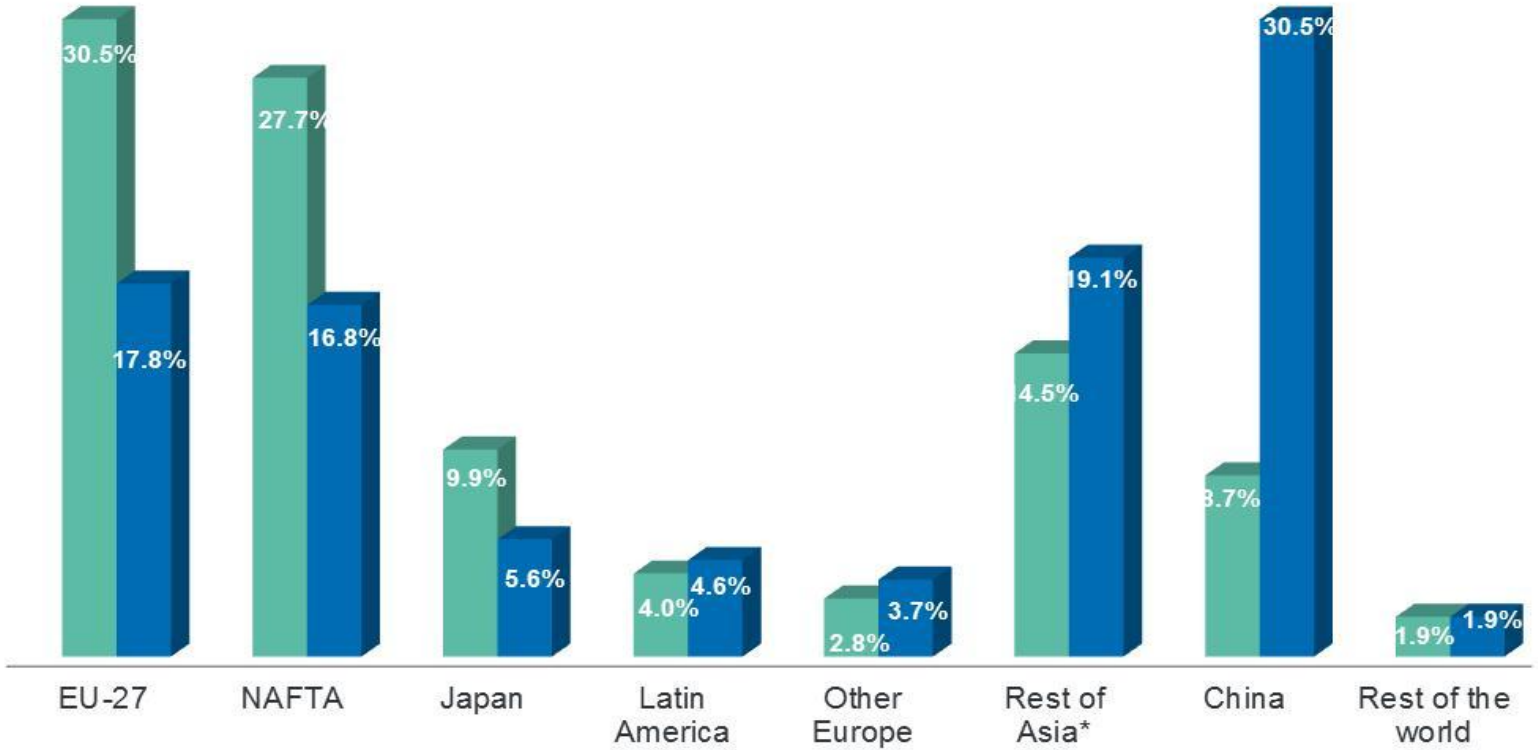


Source: Cefic Chemdata International

# Emerging economies outpace industrial countries in chemicals production

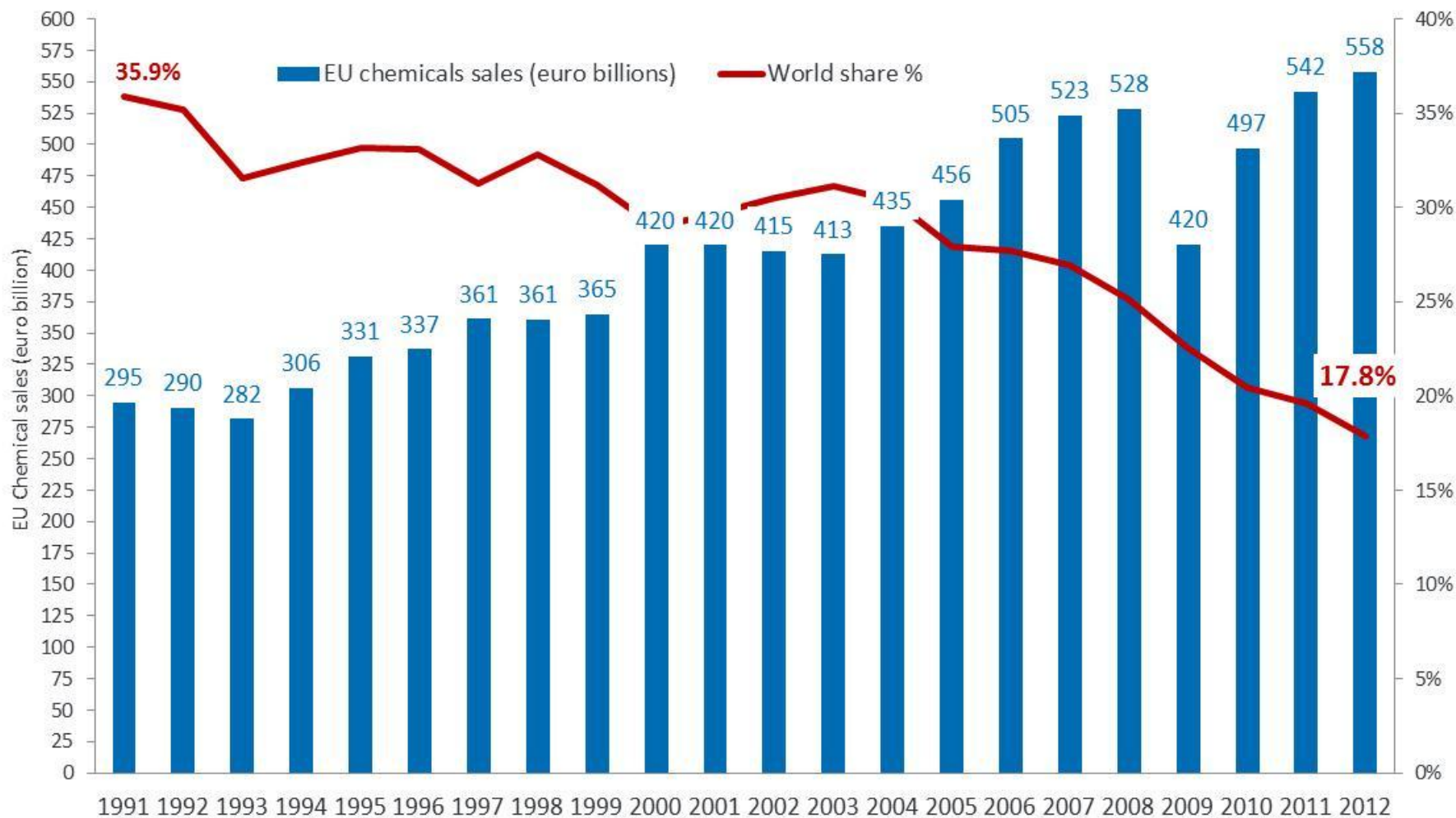


■ World Sales 2002 : €1363 billion    ■ 2012: €3127 billion



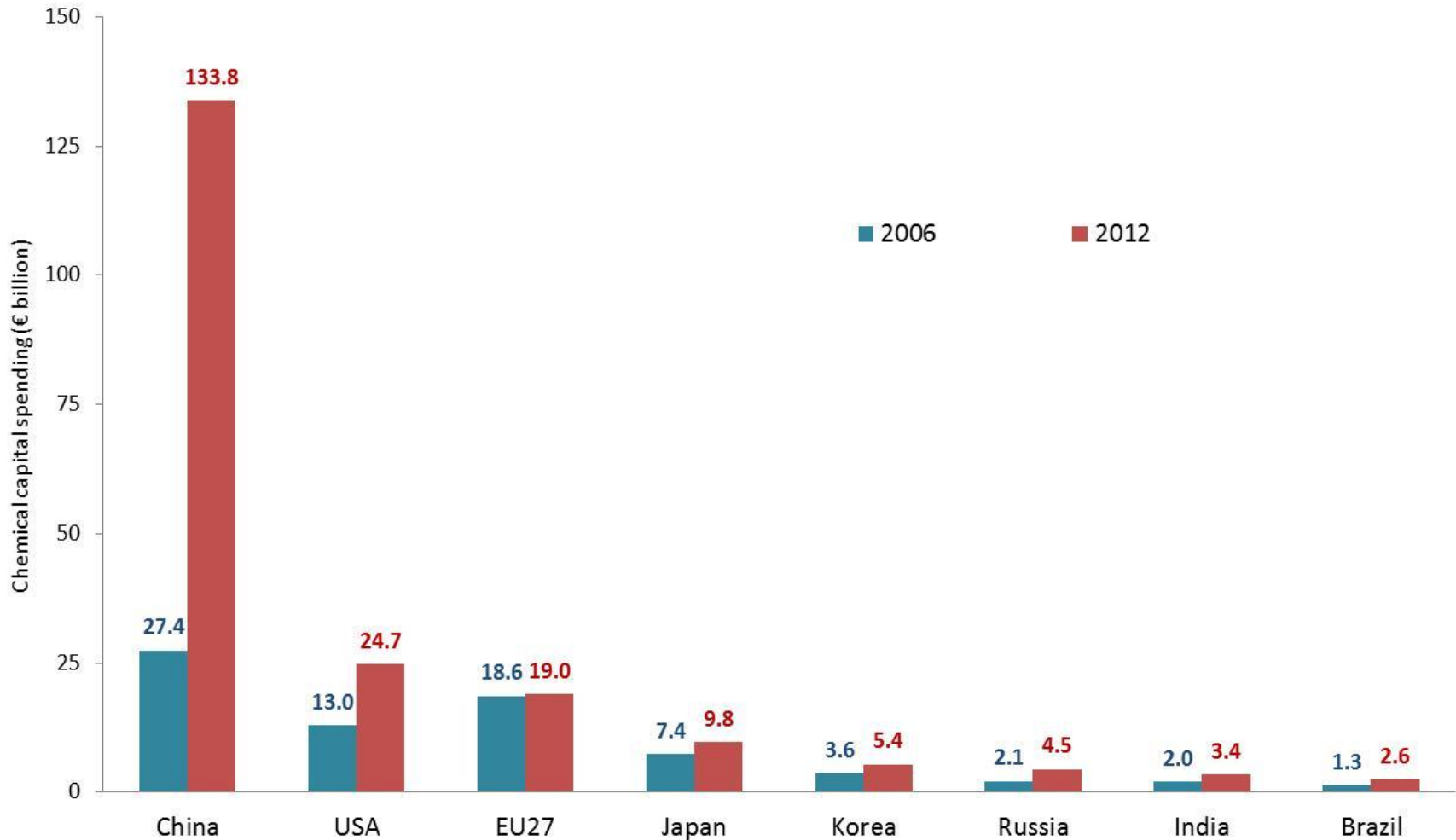
Source: Cefic Chemdata International, \*Asia excluding China and Japan

# EU market share halved in 20 years



Source: Cefic Chemdata International

# China attracts the bulk of chemicals investment

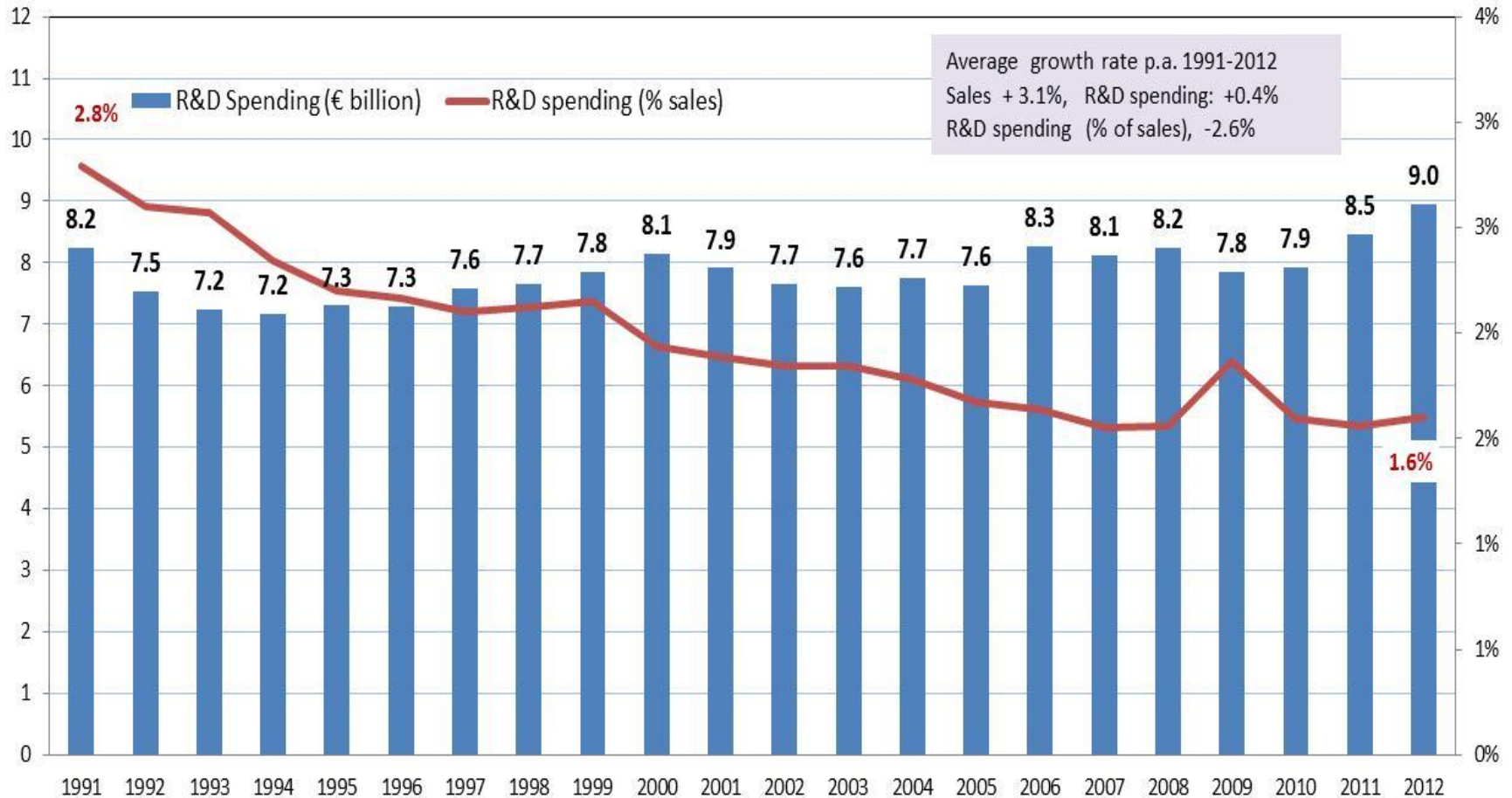


Source: Cefic Chemdata International 2013 and cefic analysis

# R&D spending intensity has fallen from 2.8% in 1991 to 1.6% in 2012



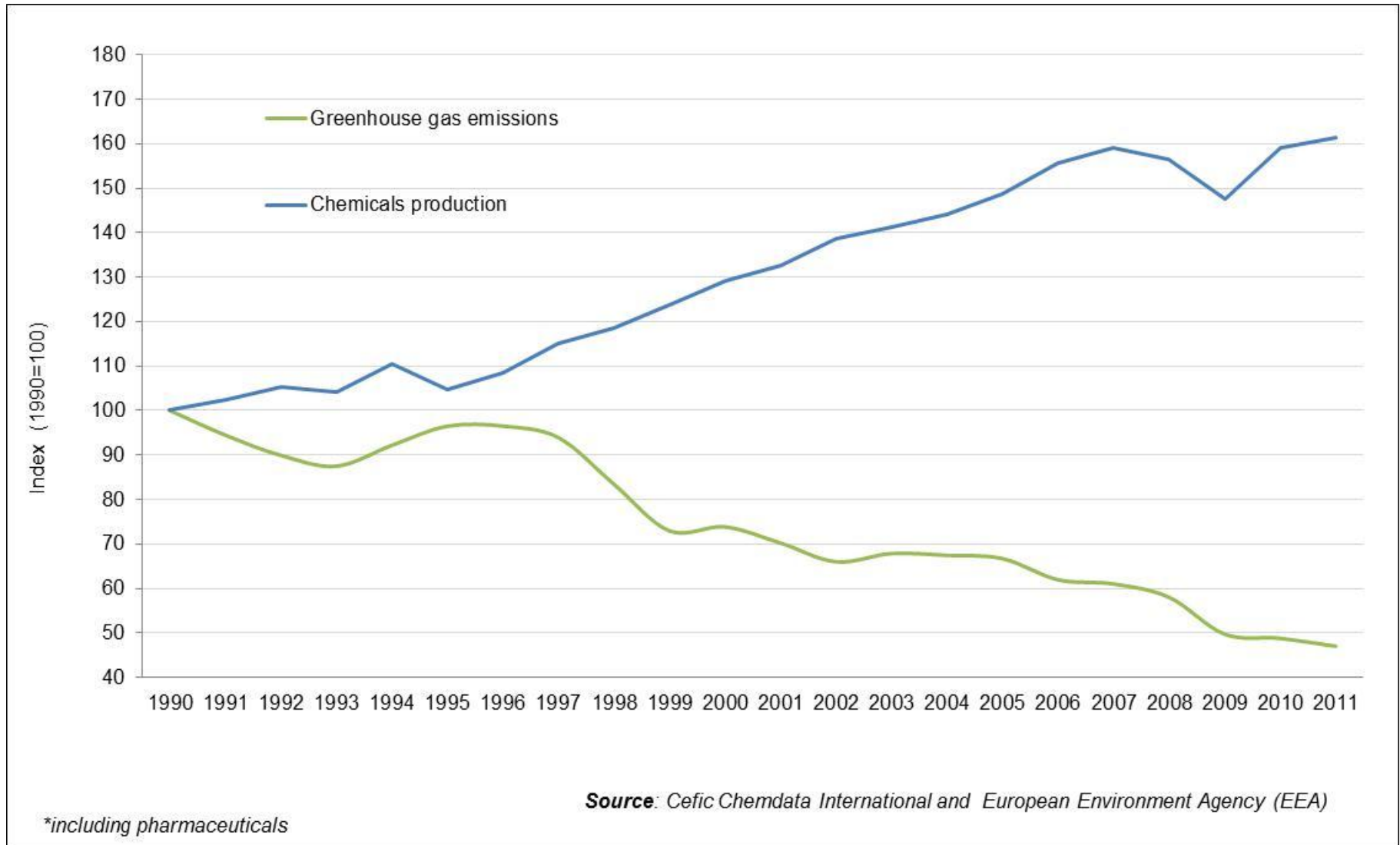
R&D spending intensity in the EU chemicals industry



Source: Cefic Chemdata International (2013) and Cefic Analysis

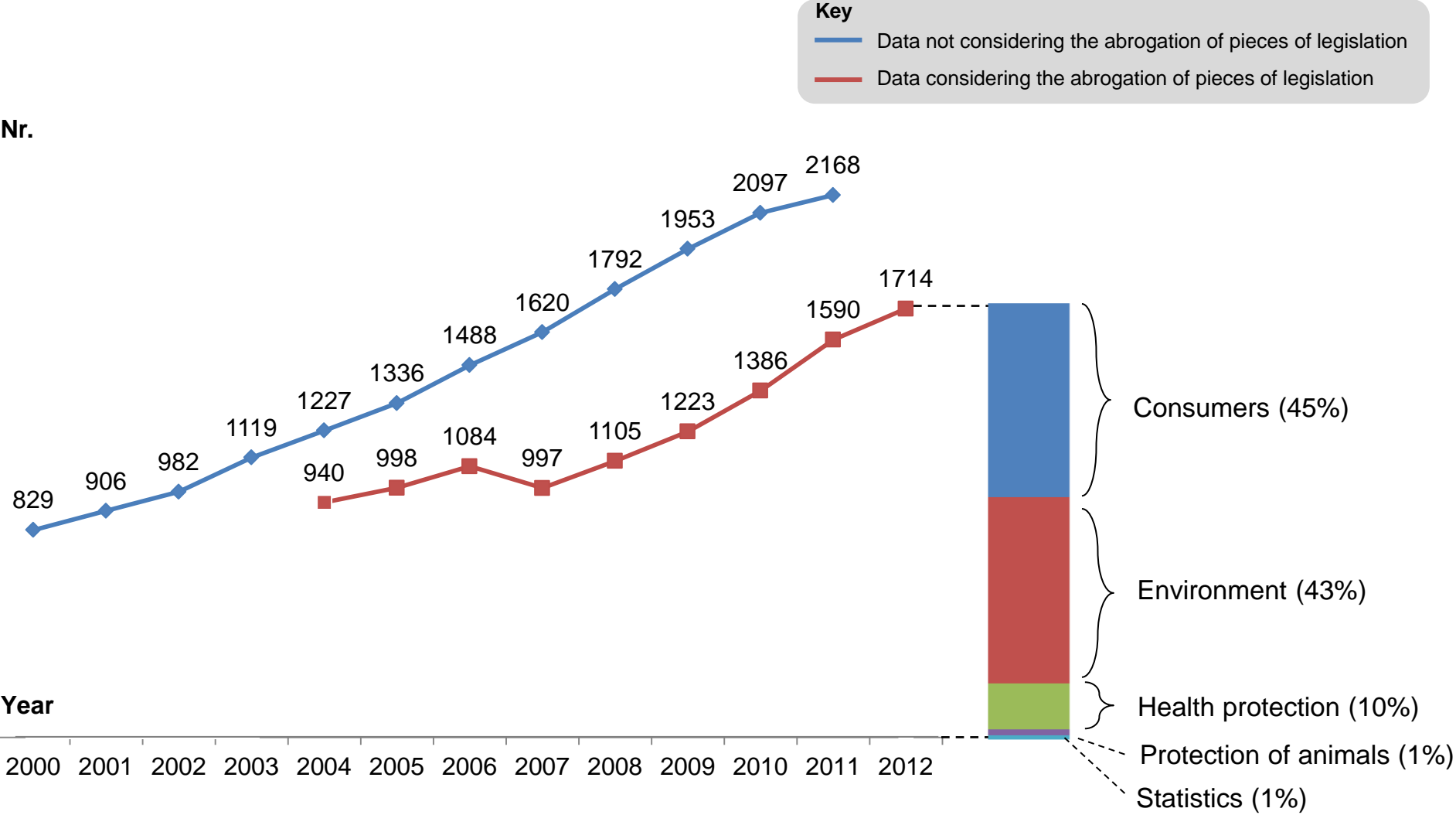


# Greenhouse gas emissions halved in 20 years, while production grew by 70%

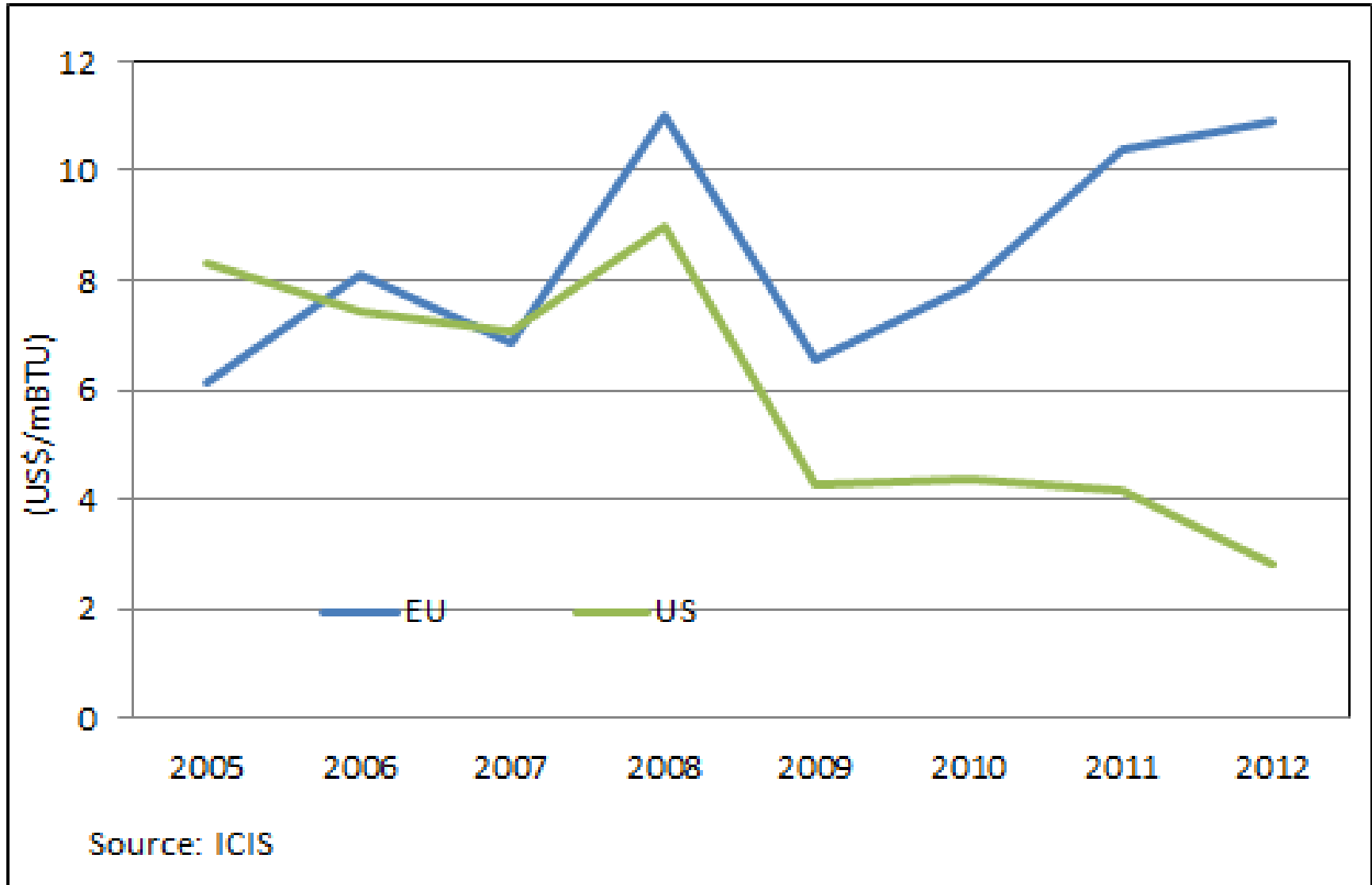




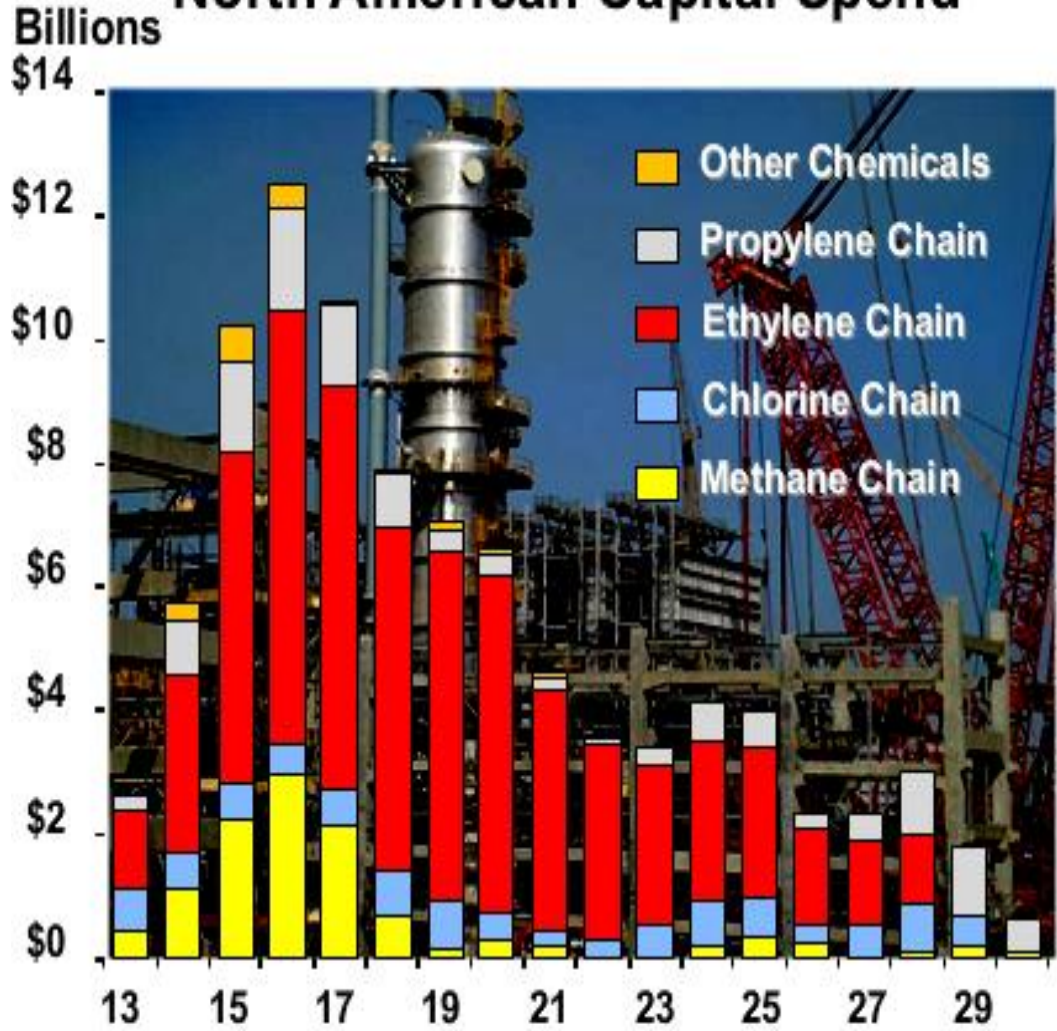
# Pieces of EU legislation on HSE issues



# Natural gas prices: US vs. EU

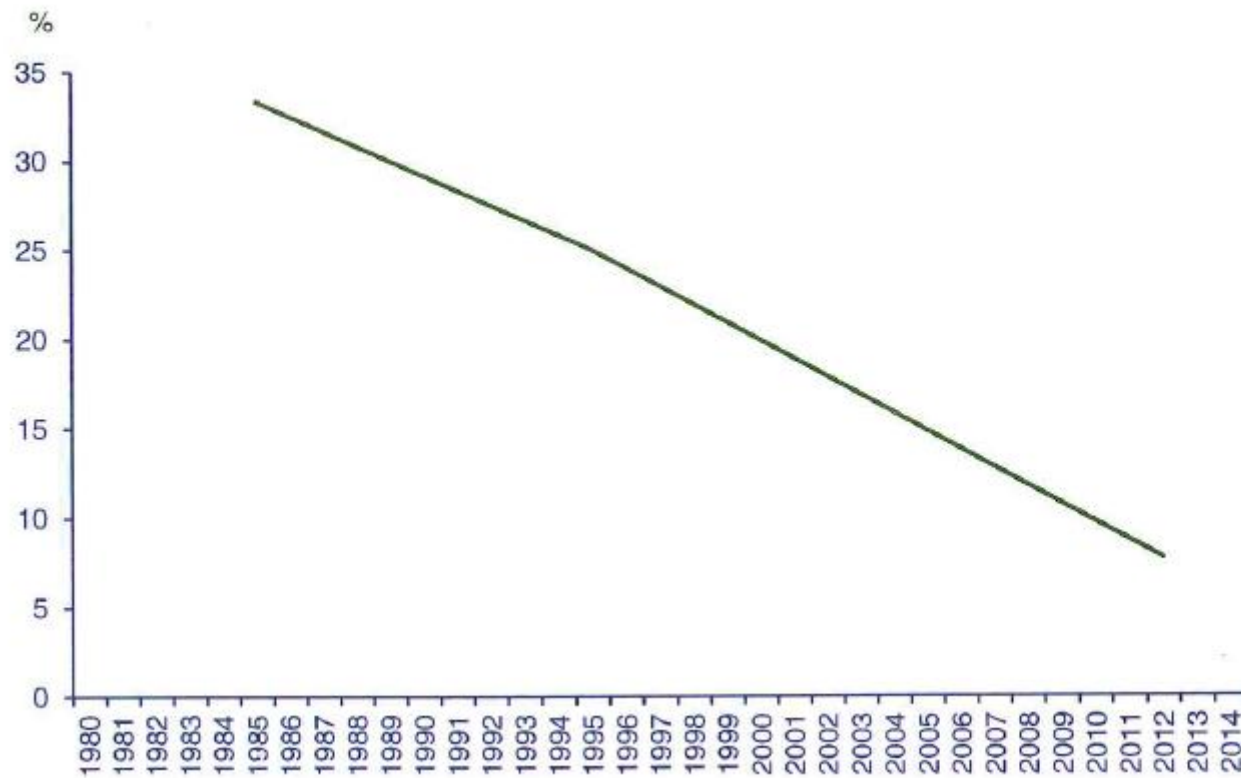


# North American Capital Spend



Source: IHS - 2013

## Share of Crop Protection R&D Focussed on Europe





- **Eu Biocides Market: € 1bn**
- **Number of biocides reduced from 1000 to 220 since BPD (2000-2011)**
- **€ 3-5 mio compliance cost for active substance**
- **Only 4 « new active substances » developed**

# Implications for Companies and Governments



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- **Follow shifting centers of economic activity and demand**
  - **Optimise EU asset base**
  - **Develop Sustainable Development strategy**
  - **Innovate**
- *Assure « level playing field »*
  - *Facilitate change*
  - *Provide favourable regulation*
  - *Catalyse « big innovation »*