

Chemicals Industry



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International

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From metal purification to synthesis of specialty chemicals, the industry provides the basic commodities that are consumed by other world industries.

Historical development



John Roebuck begins producing Sulfuric Acid on an industrial scale using the Lead Chamber Process.



Average annual spend on R&D within the industry is €8.3 billion in the EU, €6.6 billion in the USA and €6.0 billion in Japan.



Greenhouse gas emissions by the industry have been reduced by 53% over the past 20 years.

The industry today

The chemicals industry is in a process of recovery after the world economic recession; the current outlook is optimistic with employment opportunities set to increase.

Major applications of chemical use:



Plastics and synthetics



Agrochemicals e.g. fertilizers and pesticides



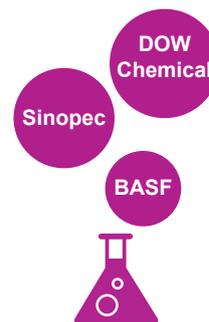
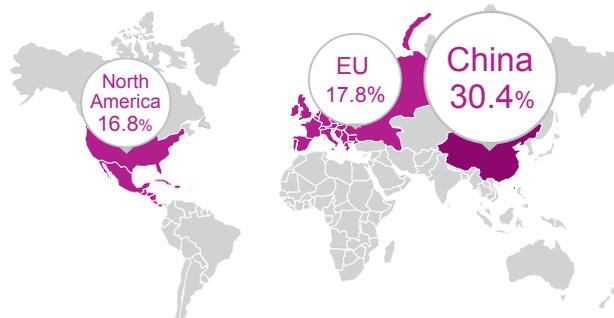
Pharmaceuticals

Major players in the industry



The global chemicals industry turnover is valued at €3,127 billion (2012), an increase of 12.8% from 2011 (largely attributed to growth in China).

Market share of global chemicals sales:



The top three companies:

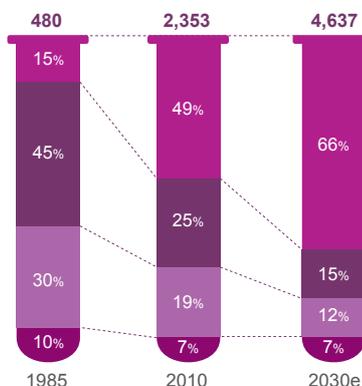
The future for the industry

> The future growth of the chemicals industry is set to be dominated by Asian markets.



Recent advances and commercialization of shale gas is expected to give an economic boost to the North American petrochemicals industry.

Asia's large population and increasing urbanization has caused a burgeoning demand for chemicals within the region.



Sales

The chart shows how the chemicals industry will continue to shift from Europe and North America to Asia, which is anticipated to account for 2/3 of world sales by 2030.

■ Asia ■ NAFTA
■ Europe ■ Rest of world

(€ billion; 2030 is calculated at 2010 prices and exchange rates)

Insight

The chemicals industry has started to recover after the global recession – leading to new opportunities, particularly in Asia.

- > Develop new supply chains in emerging markets to fully capitalize on opportunities from shale gas.
- > Latest innovations and environmental awareness in manufacturing, electronics, plastics and consumer goods has created a larger demand for specialty chemicals.
- > Future leaders will be those that innovate to address global challenges such as population, water and climate change.