

THE GERMAN CHEMICAL INDUSTRY

SEPTEMBER 14, 2026

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Agenda

The Chemical Industry Globally

The German Chemical Industry

Opportunities for Chemicals Producers in Germany

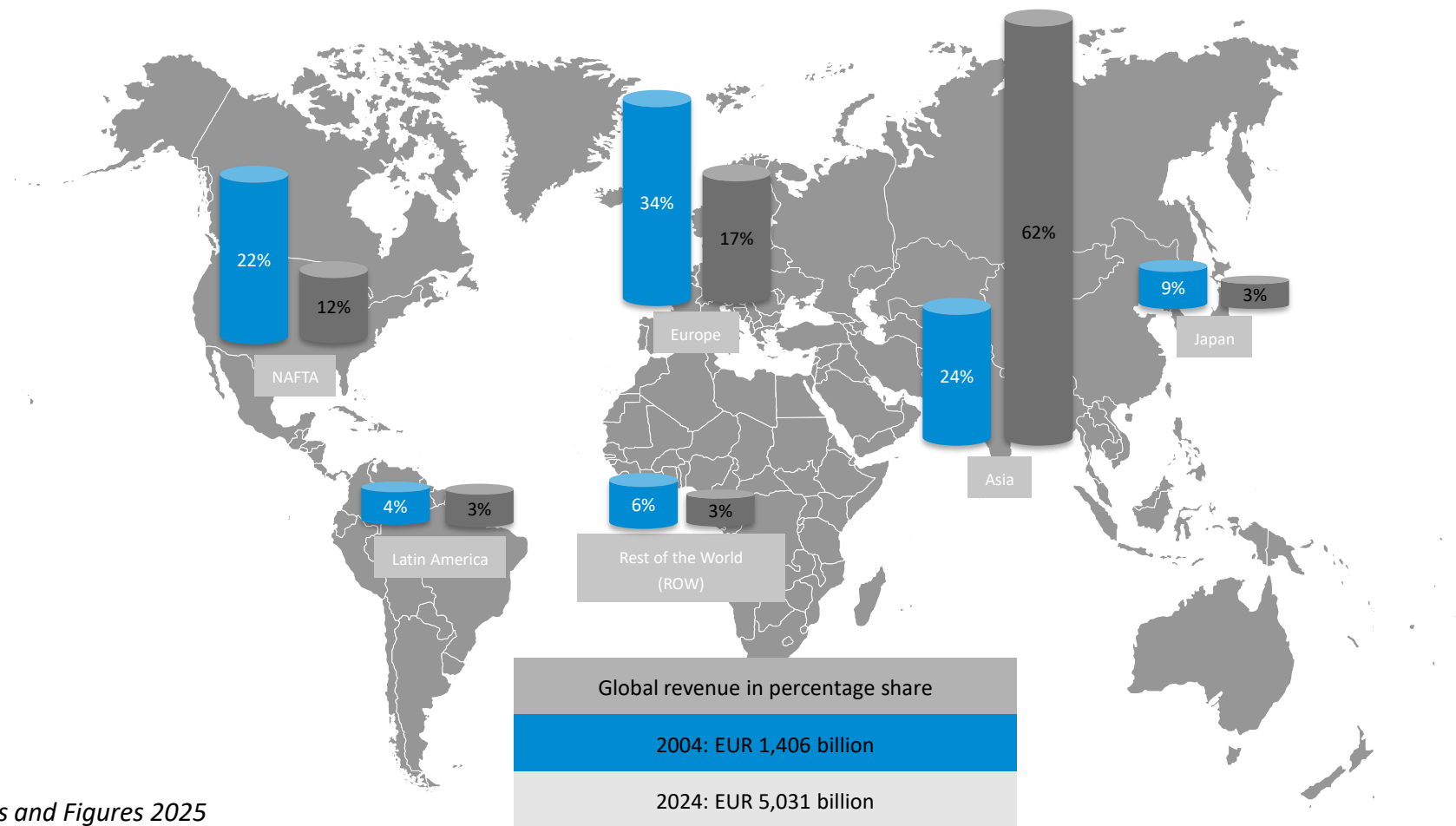
Main sources:

- *Cefic: The European Chemical Industry Council, www.cefic.org*
- *Destatis: Statistisches Bundesamt (engl.: Federal Statistical Office), www.destatis.de*
- *VCI: Verband der chemischen Industrie (engl.: German Chemical Industry Association), www.vci.de*



Global Chemical Revenue

Global chemical sales more than tripled between 2004 and 2024 (CAGR: 6.6%), while the industry's center of gravity increasingly shifted from the industrialized regions to Asia.

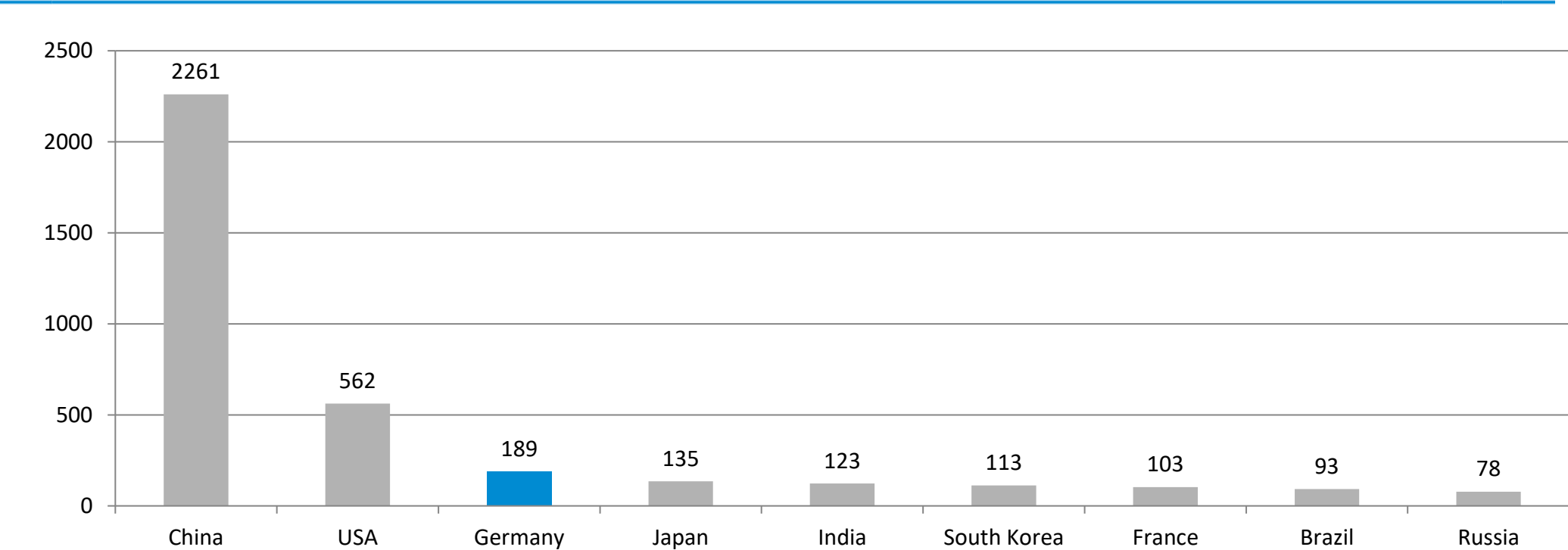


Quelle: Cefic, Facts and Figures 2025

Global Revenues

Germany is the world's third largest chemical market, being surpassed only by China and the US in terms of revenues.

Chemical Revenue in EUR billion, 2025

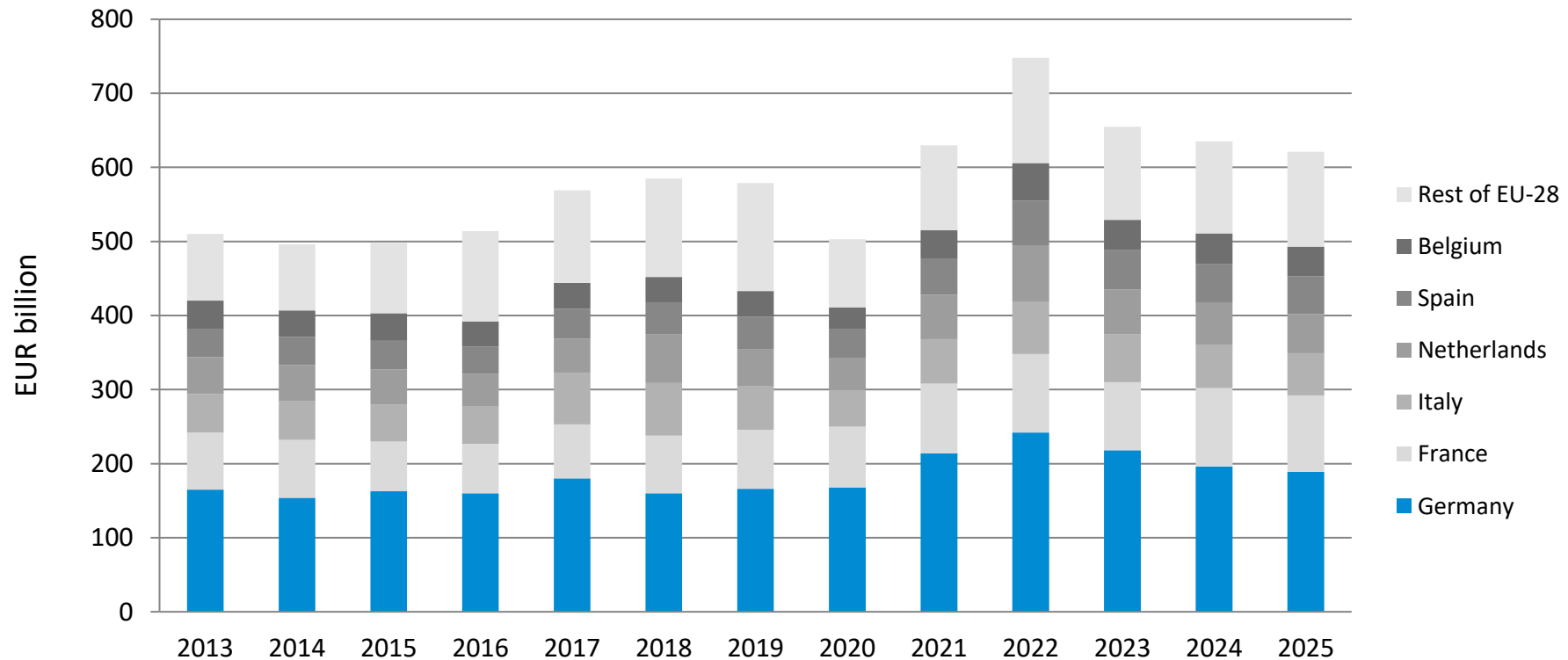


Quelle: VCI, Chemiewirtschaft in Zahlen 2026 (Table 59b)

European Revenues

With a share of 30% in 2025, the German chemical industry has consolidated its leading role within the EU during the recent years.

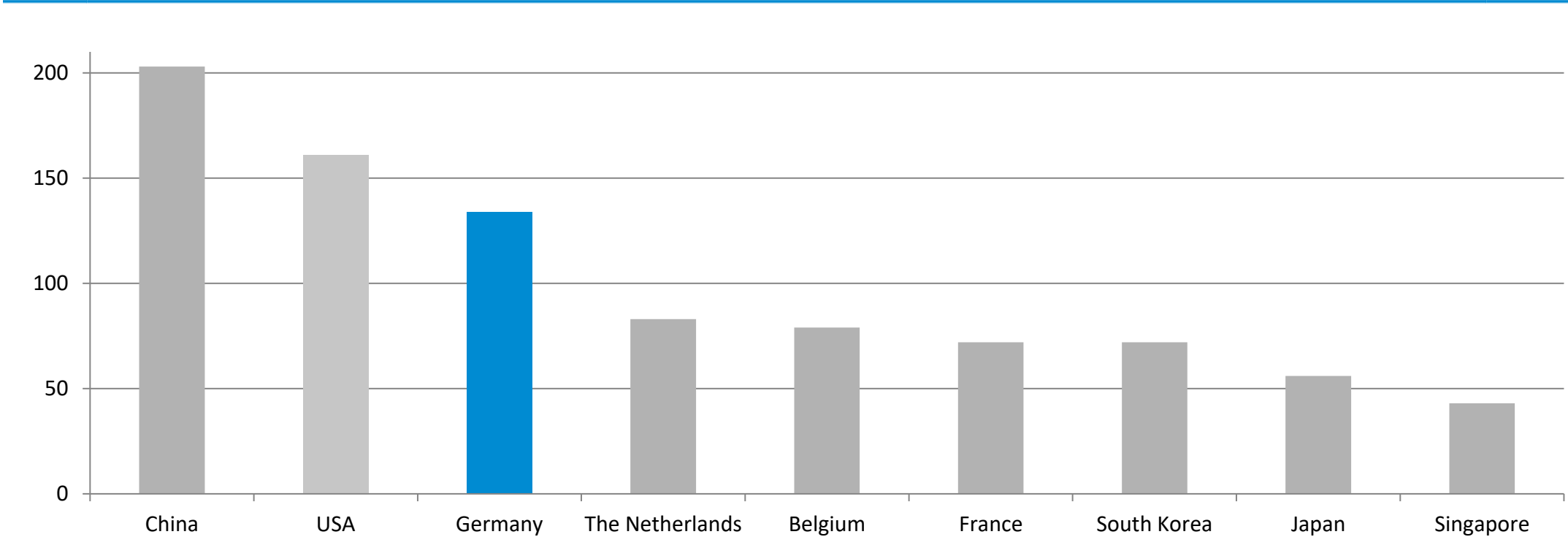
European (EU-28) Chemical Industry Revenues in EUR billion, 2013–2025



Chemical Exports

In 2020, China's exports has surpassed the US for the first time and has widened the gap since then. Germany still maintains the No. 3 spot.

Chemical Exports by Country in EUR billion, 2025



Source: VCI, Chemiewirtschaft in Zahlen 2024, Table 60b.

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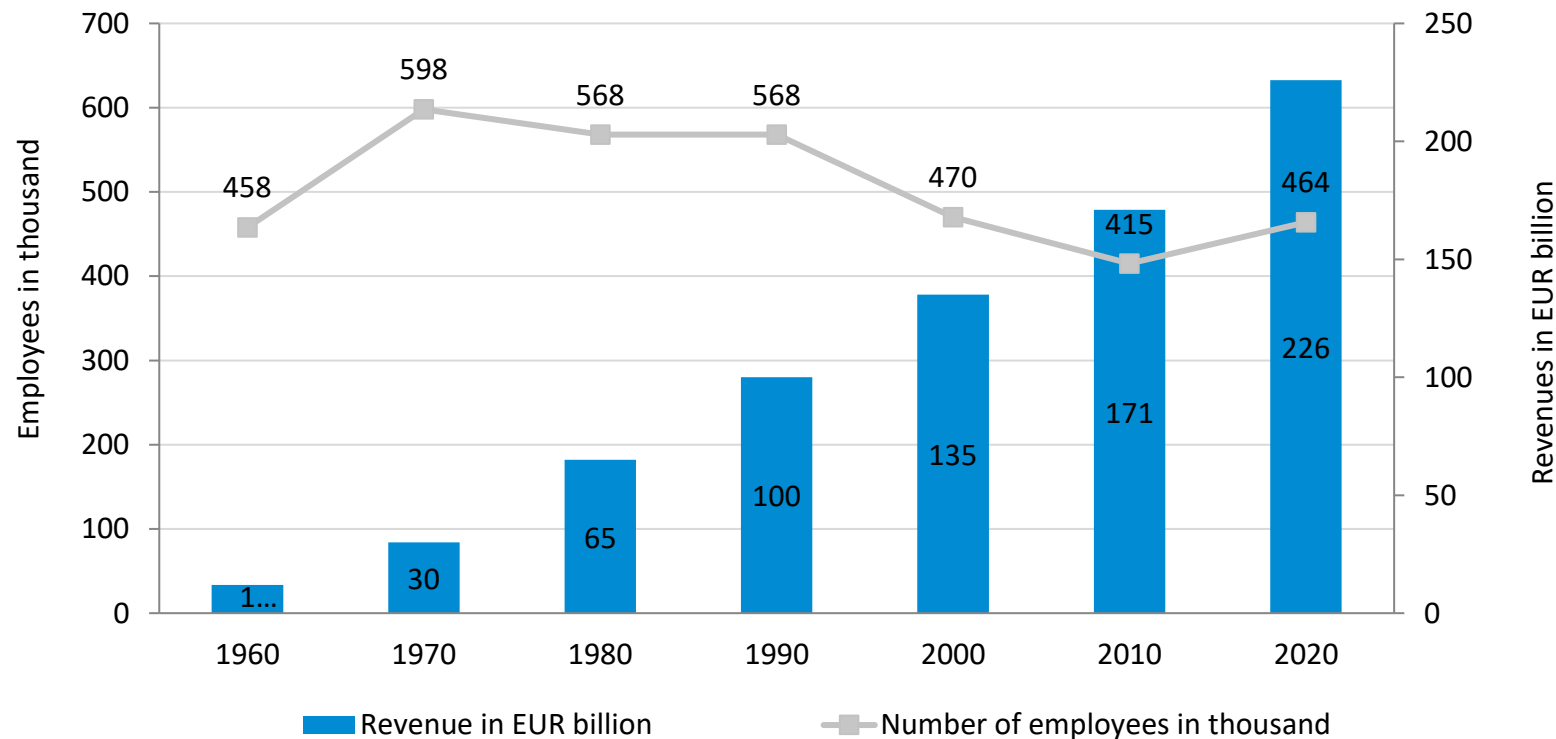
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The History of the German Chemical Industry

60 years of growth: Revenues grew by 5.0% p.a. (2.7% real) with a nearly unchanged workforce.

Revenues and Number of Employees of the German Chemical and Pharmaceutical Industry, 1960-2020



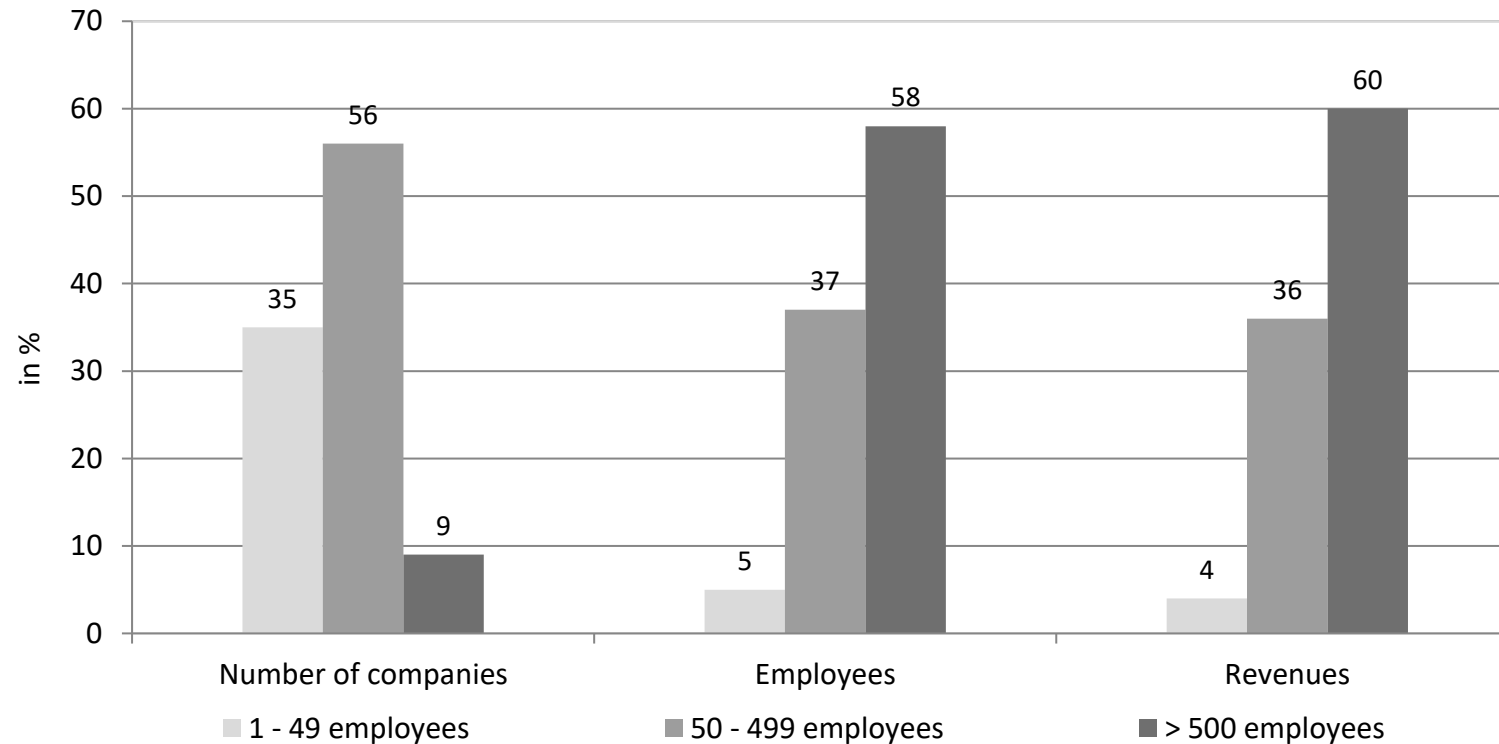
Quelle: VCI, Chemiewirtschaft in Zahlen 2021

Details: 1960 without Saarland. From 1964 on including West-Berlin; 1970, 1995, and 2008 new Classification. From 1991 Germany reunified.

German Chemical Companies Structure

The industry is “dominated” by small and medium-sized companies, whereas the lion’s share of revenues (60%) is raised by large caps.

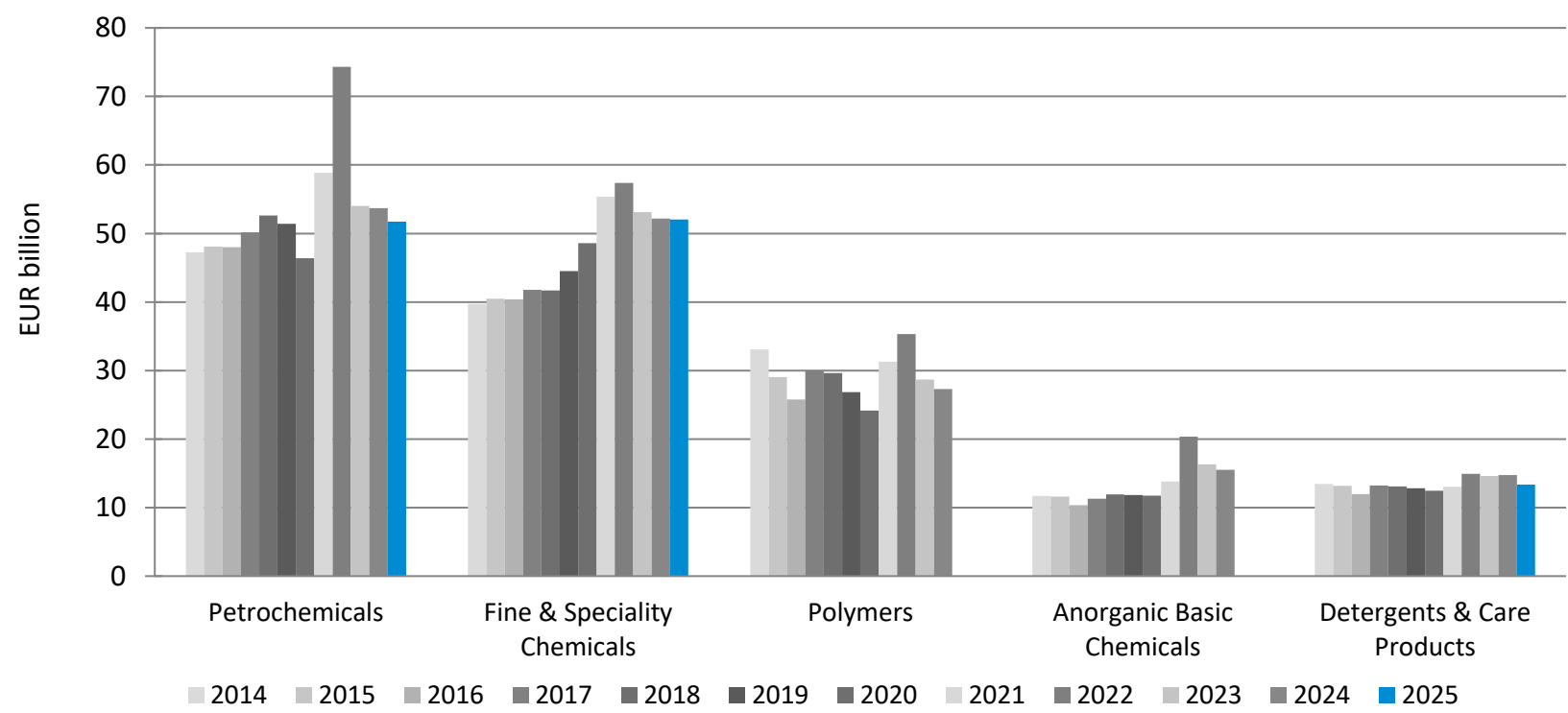
Number of Chemical Companies, Employees and Revenues by Company Size, 2025



Chemical Market Segmentation

Petrochemicals as well as Fine and Specialty Chemicals continue to constitute the backbone of the German chemical production market.

Chemical Market Segmentation by Revenues in EUR billion, 2014–2025

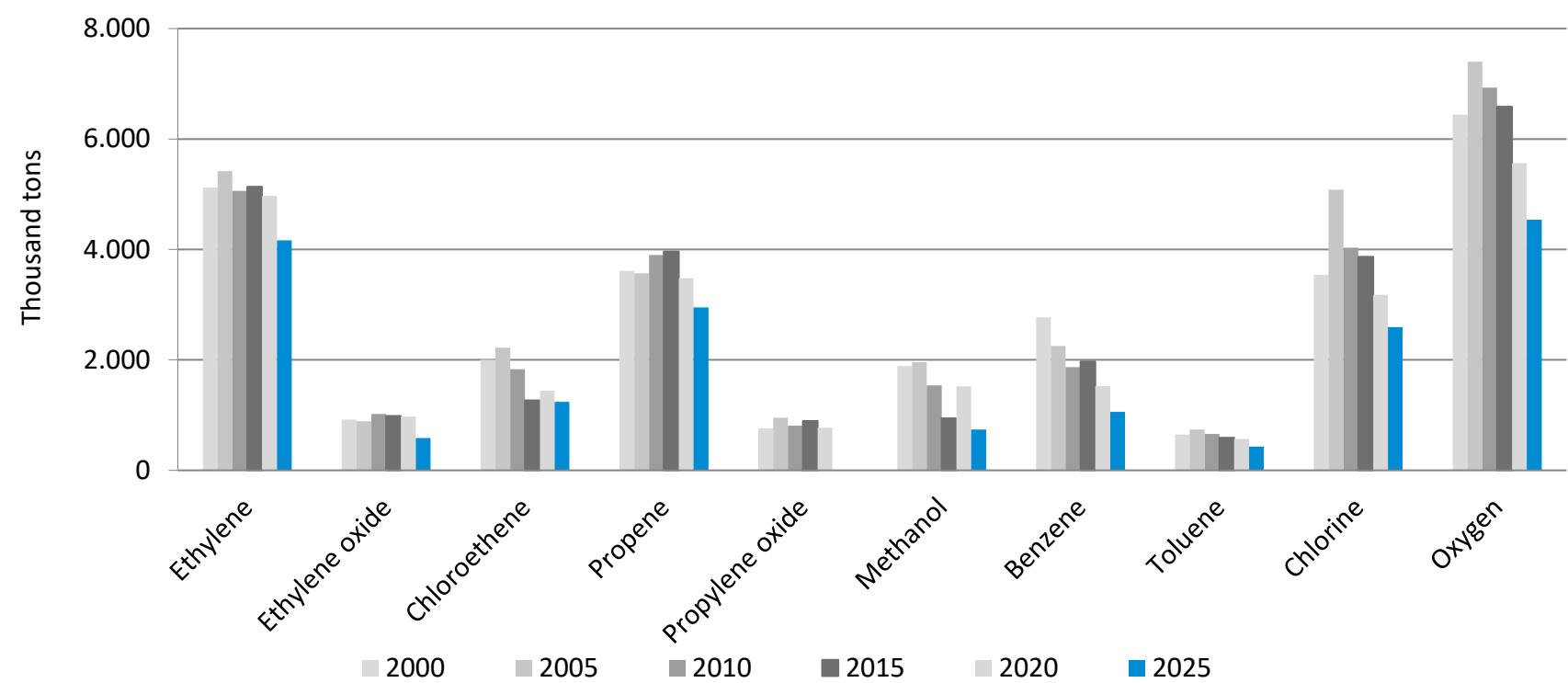


Source: VCI, Chemiewirtschaft in Zahlen 2026, Table 14a

German Chemicals Production

Despite lower basic chemicals production volumes since 2015, Germany's chemical industry has sustained annual revenues of around €200 billion in recent years.

Production Volumes of Basic Chemicals in Germany, 2000–2025

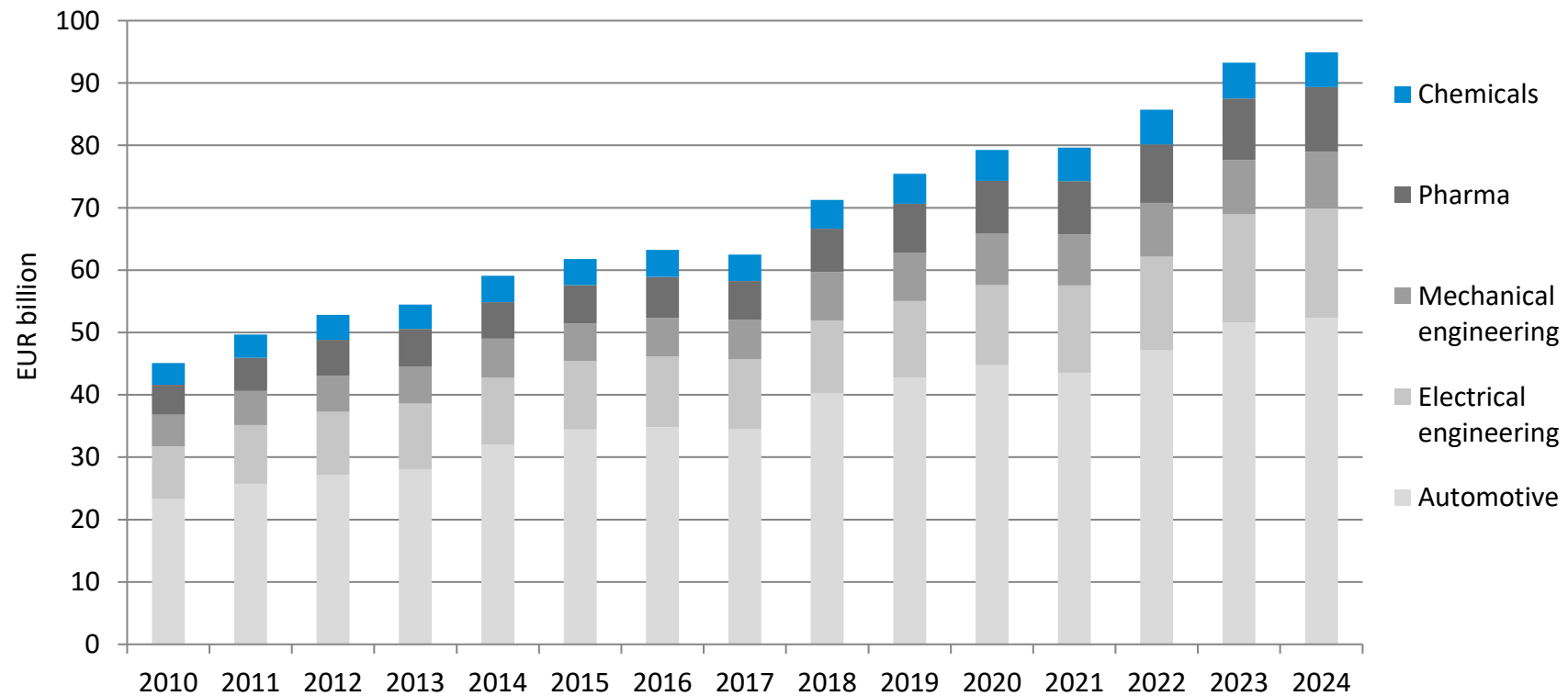


Source: VCI, *Chemiewirtschaft in Zahlen 2026*, Table 4a and 4b; Oxygen in million m³ under normal conditions.

Germany's private R&D spending

German chemical industry R&D expenditure was roughly EUR 6 billion in 2024, making the sector the fifth strongest in Germany.

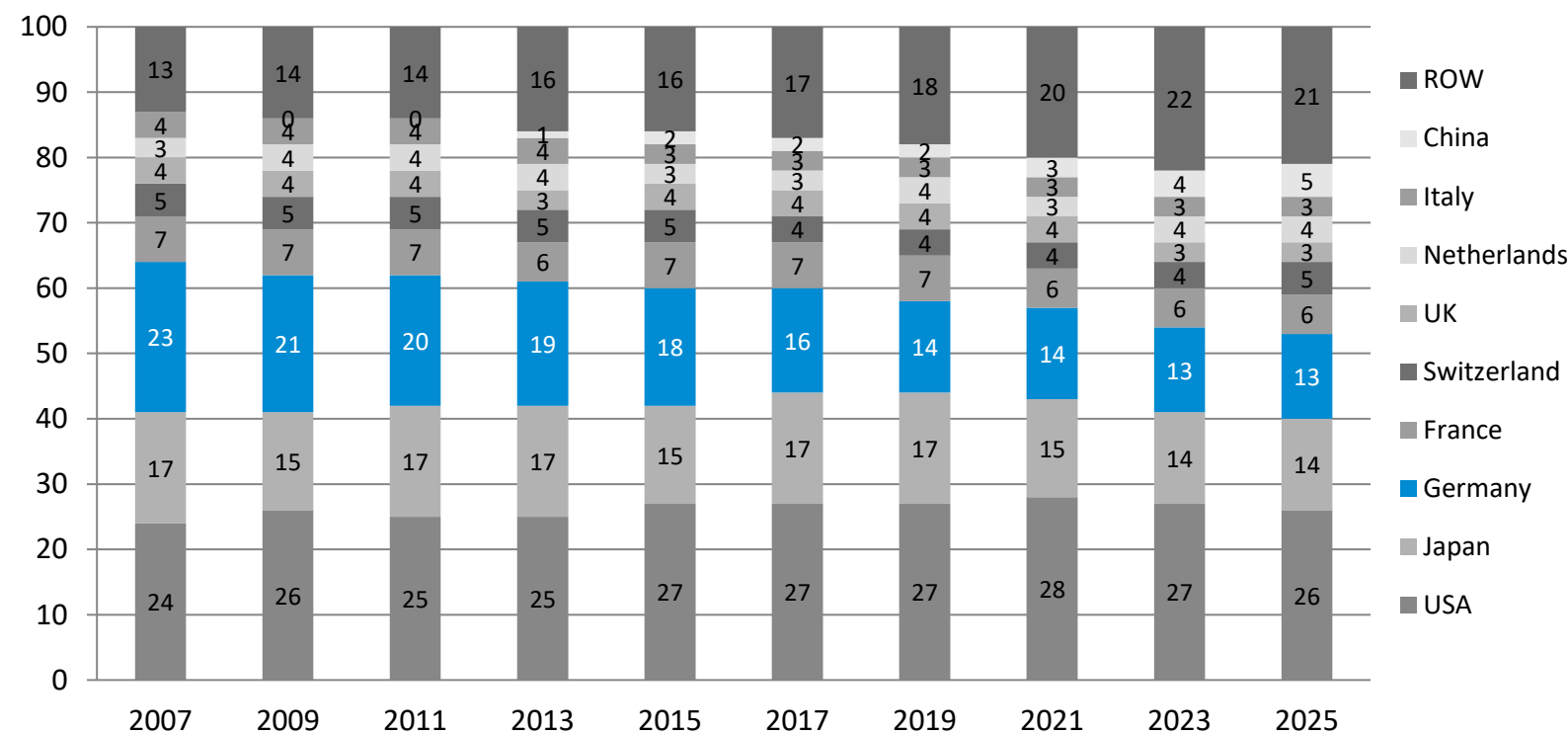
R&D Expenditure by Industry in EUR billion, 2010–2024



Chemical Patents

Germany is number three spot for European chemical patent registrations, only surpassed by the US and Japan.

European Chemical Patents granted by the EPO by Source Country in %, 2007–2025

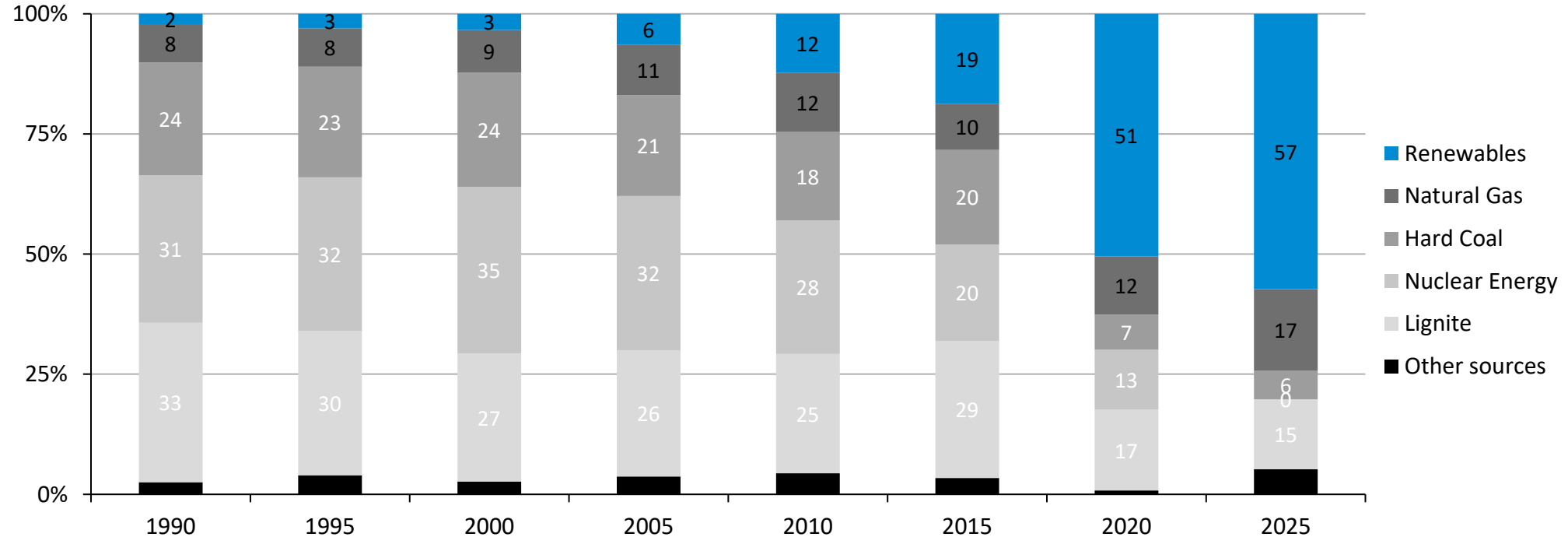


Source: European Patent Office (EPO), 2024

Electricity generation

In the last 30 years Germany got “greener”, as Renewables has grown from 2% over more than half of the entire electricity production.

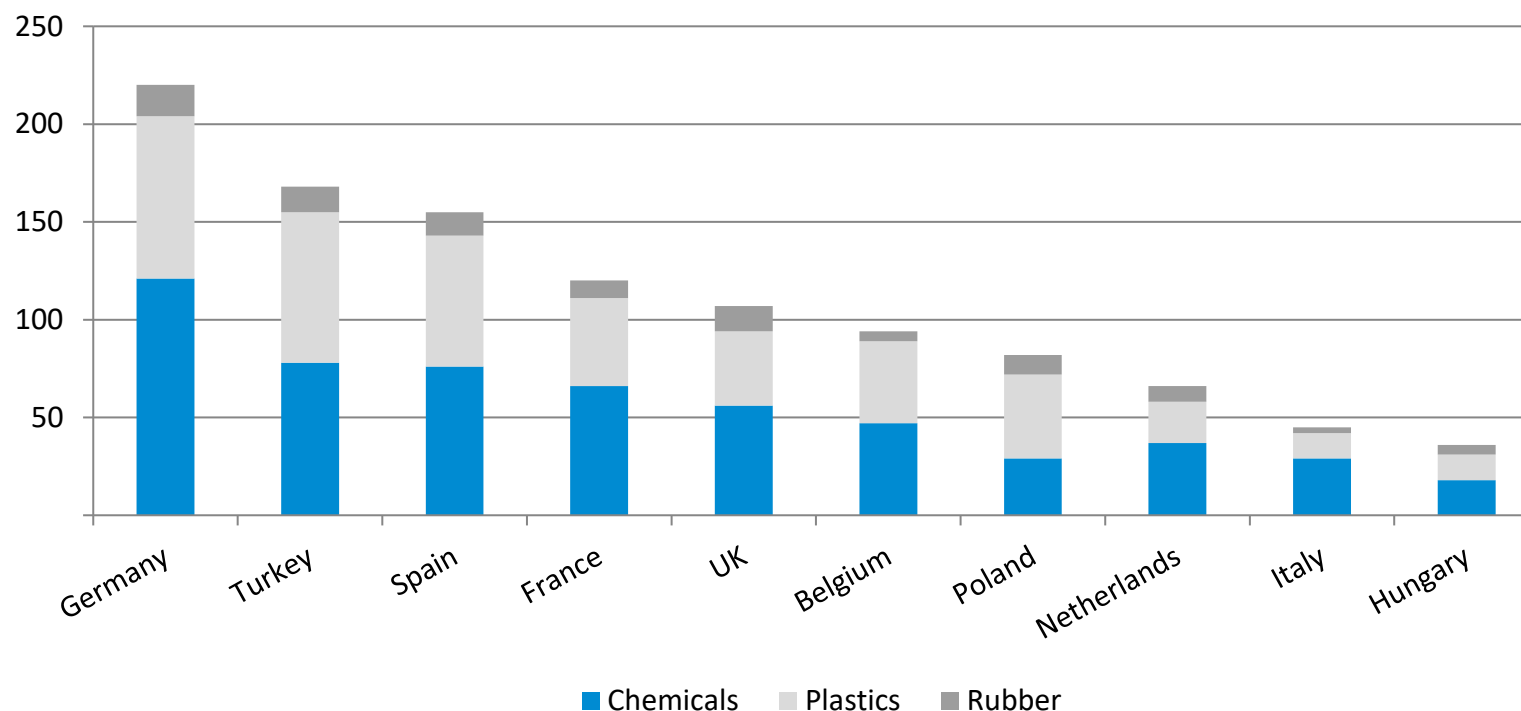
Electricity Generation in Germany by Energy Carrier in %, 1990–2025



Investments in Europe

Thanks to market attractiveness, most chemical, plastics and rubber investments in Europe for the period 2020 to 2025 occurred in Germany.

Number of Investments in Europe, 2020–2025 (6 years accumulated)



Source: fDi markets (as of September 11, 2026). Total number of investments (1,388): Chemistry (696), Plastics (564), Rubber (128).
Graph represents 79% of all investments.

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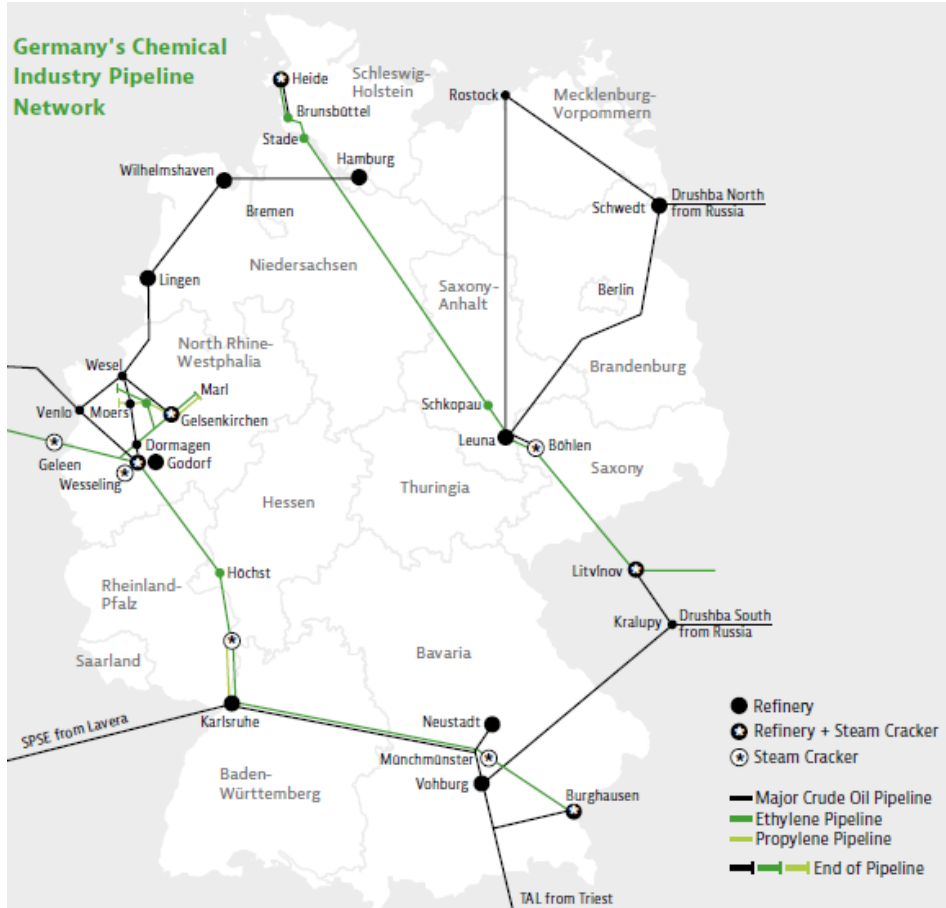
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Raw Materials Supply

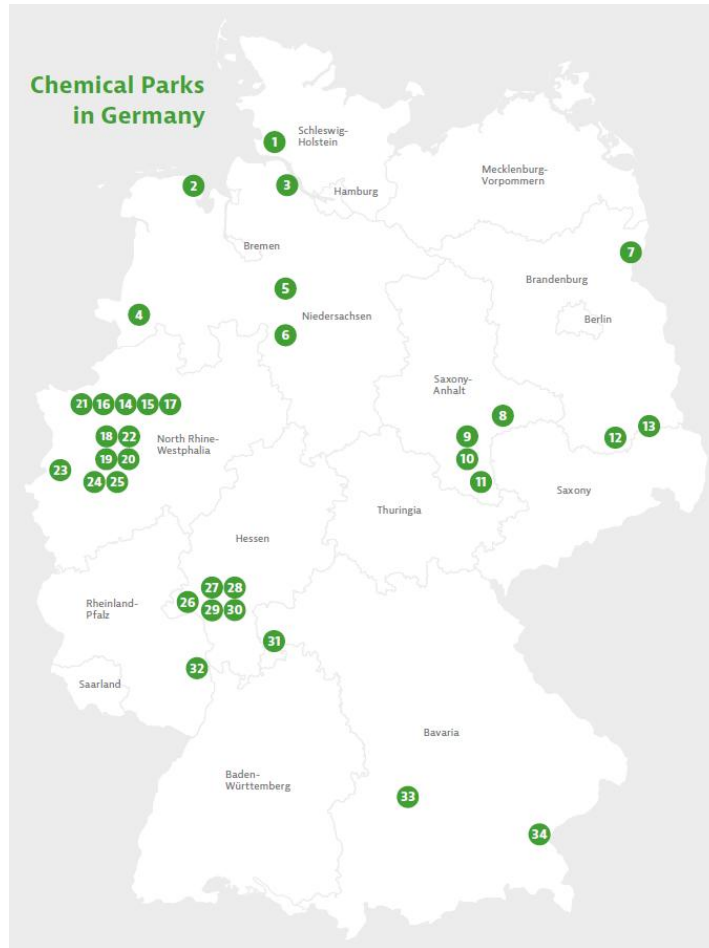
Germany's chemical industry regions are well connected to the European pipeline grid.



Infrastructure of raw materials supply

- Crude oil via pipelines from:
 - Russia
 - the Mediterranean Sea
 - France
 - the North Sea
- Crude oil processing via:
 - 14 refineries
 - 8 steam crackers
- Pipelines for:
 - ethylene and propylene
 - natural gas
 - hydrogen
 - carbon monoxide

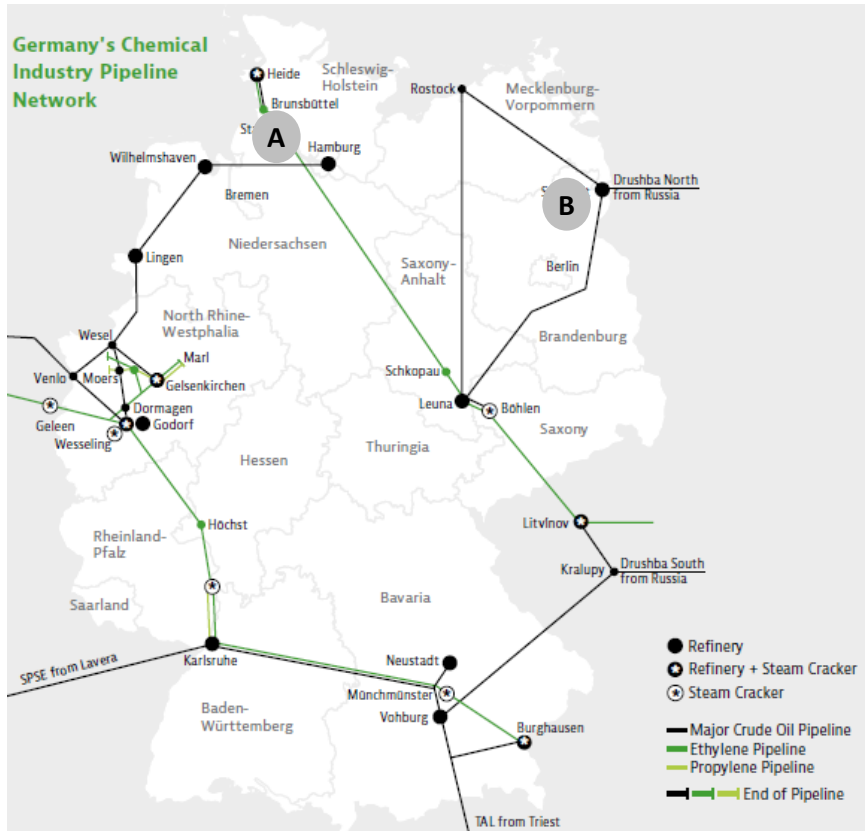
Chemical Parks „Plug & Play“ concept



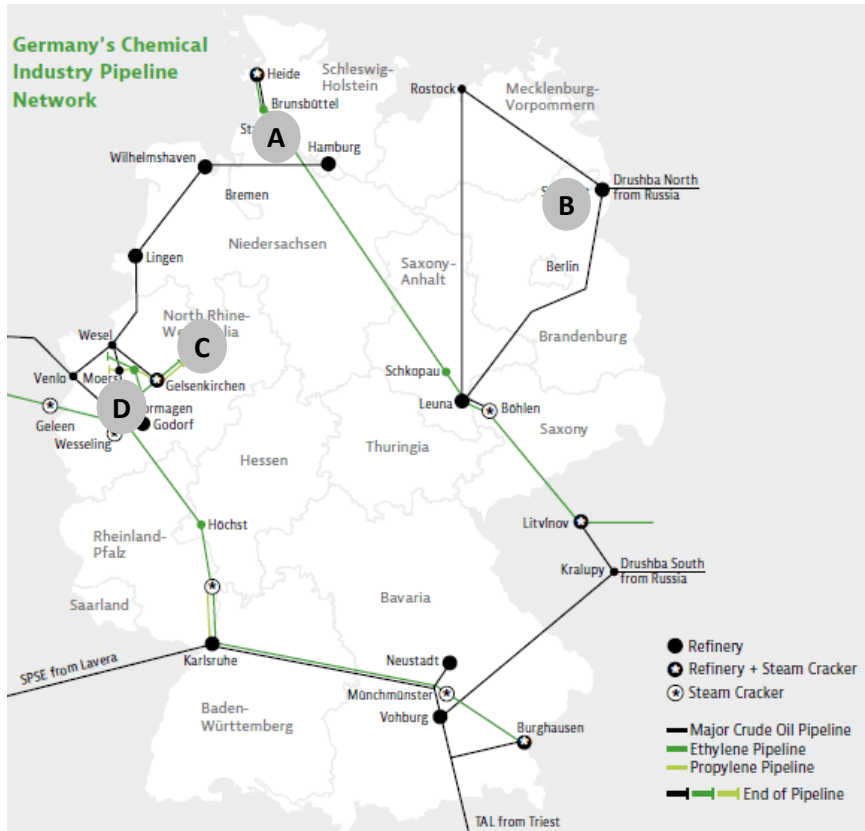
Chemical Parks – Advantages:

- About 30 chemical parks offer cost-efficient and unique benefits through:
 - excellent infrastructure
 - chemical raw materials via pipelines
 - gases and steam via pipelines
 - secure energy supply
- Site operators offer expertise and services from one source
- Investors choose the services from site operator that suits their business model best

Chemical Parks – Selected Locations



Chemical Parks – Selected Locations



Chemical Parks – Selected Locations

