

Facts and Figures

The European chemical industry
in a worldwide perspective

September 2011



The 2011 Cefic European Facts & Figures provides an analysis of the latest competitive trends in the European chemical industry

Released each year, the Cefic European Facts and Figures document provides the most up-to-date information based on currently available data about the sector, which produce 21 per cent of the world's chemicals.

What the document contains

Facts & Figures provides a clear analysis that gives readers a better economic picture of the European chemical industry.

The analysis excludes the pharmaceuticals sector unless specified.

Readership

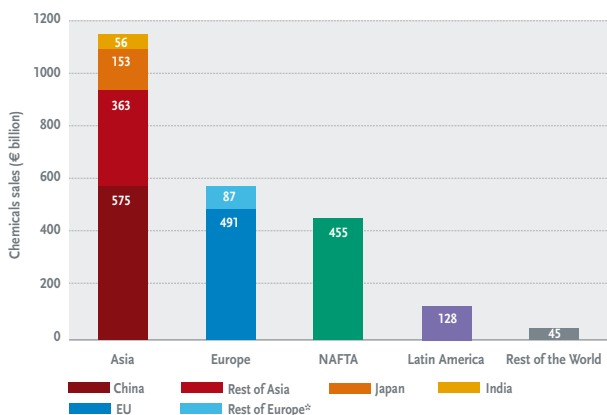
It is an important reference document used primarily by industry analysts, researchers, policymakers and chemical companies.

The importance of Europe's chemical sector

The chemical industry is one of the European Union's most international, competitive and successful industries, embracing a wide field of processing and manufacturing activities.

The output of the chemical industry, which includes all 27 EU member states, covers a wide range of chemical products and supplies virtually all sectors of the economy. The industry also provides a significant contribution to EU net exports.

Asian chemical production equals that of Europe plus America



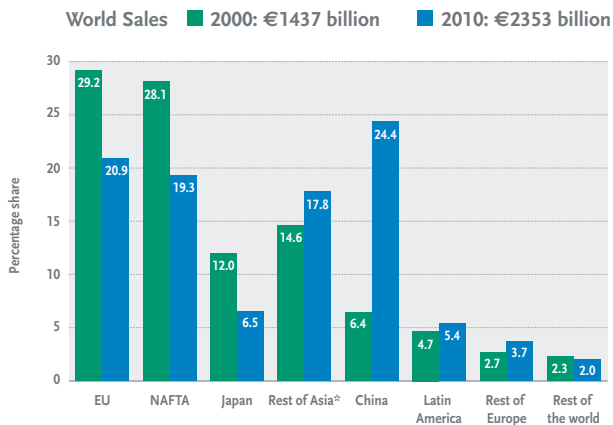
World chemical sales in 2010 are valued at € 2353 billion.

The EU accounts for 21% of the total.

Source: Cefic Chemdata International

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

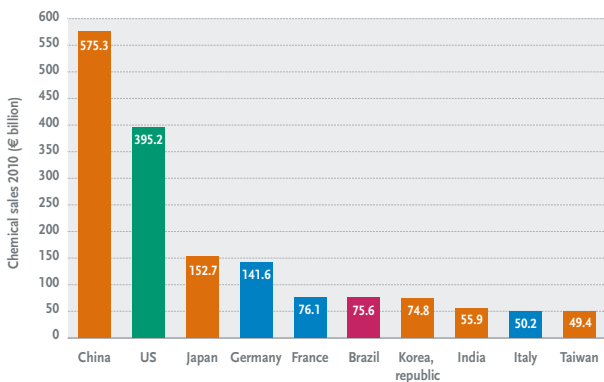
Emerging economies outpace industrial countries in chemical production



Source: Cefic Chemdata International

*Asia excluding China and Japan

China - the biggest chemical producer in 2010

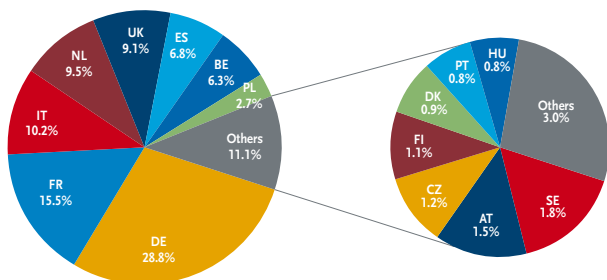


Source: Cefic Chemdata International

Eight countries account for 90% of European chemical production

Sales 2010: €491 billion

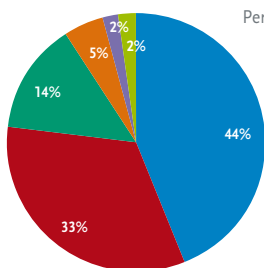
Percentage shares



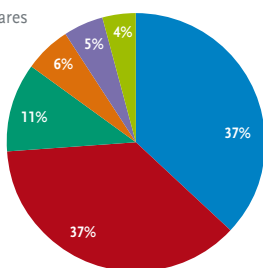
Sources: Eurostat and Cefic Chemdata International

The European Union is the world's top exporter and importer of chemicals

World exports of chemical*
2010



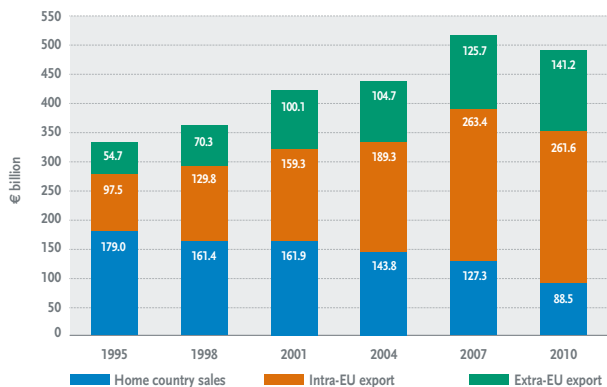
World imports of chemical*
2010



Sources: Eurostat and Cefic Chemdata International

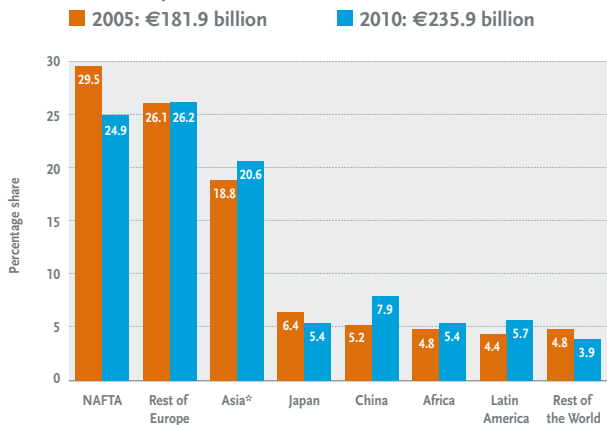
* Including intra EU trade

Intra-EU trade has increased significantly due to the success of the internal market



Sources: Eurostat and Cefic Chemdata International

Half of all extra-EU chemical trade** now occurs with NAFTA and Rest of Europe

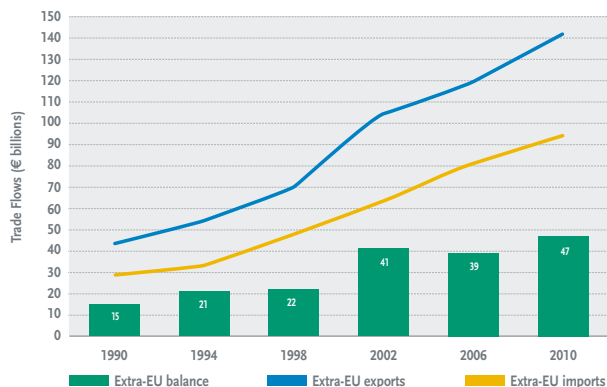


Sources: Eurostat and Cefic Chemdata International

* Asia excluding Japan and China

** Trade = extra-EU exports + extra-EU imports

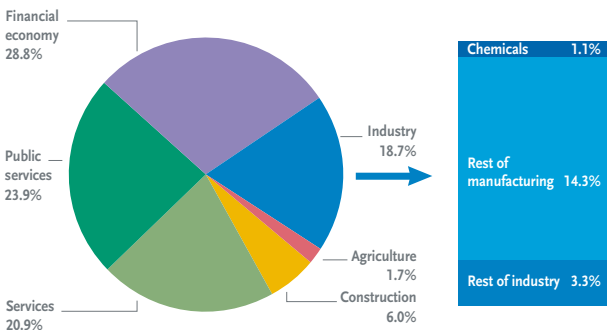
The EU chemical trade surplus at record level in 2010



Sources: Eurostat and Cefic Chemdata International

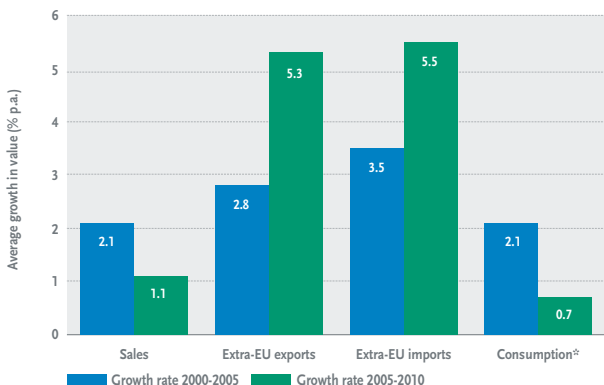
The chemical industry directly accounts for 1.1% of total EU gross domestic product, down from 1.5% in 1995

Percentage of GDP, 2010



Sources: Eurostat and Cefic Chemdata International

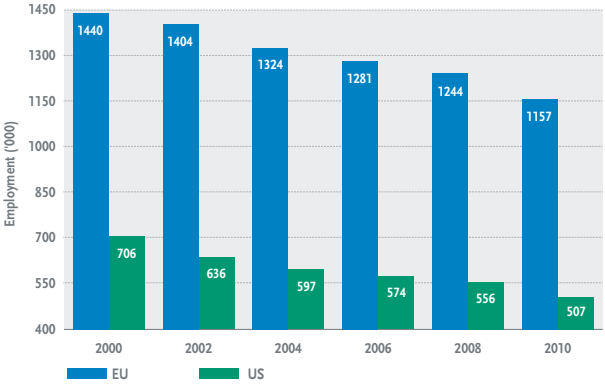
EU trade is a key driver of the EU chemical industry



Sources: Eurostat and Cefic Chemdata International

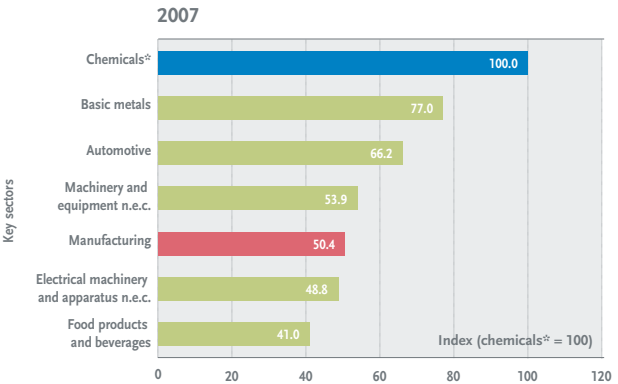
* Consumption = total sales - exports + imports

Employment in the EU chemical industry has decreased on average by 2.2% per year during the past 10 years



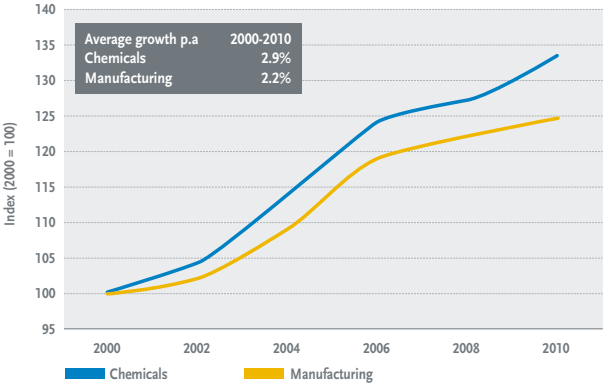
Sources: Eurostat, ACC and Cefic Chemdata International

Chemical industry - the leading EU manufacturing sector in terms of value-added per employee



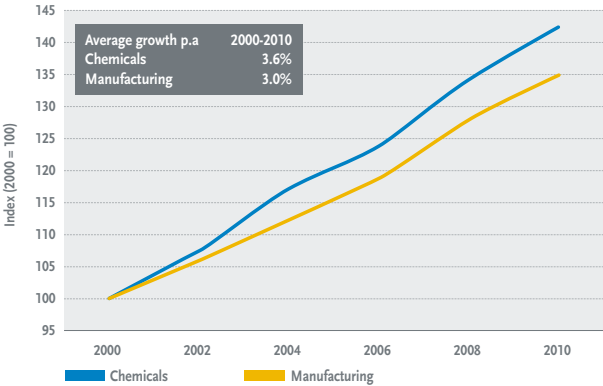
Sources: Eurostat and Cefic Analysis
* Including pharmaceuticals

Labour productivity in the EU chemical industry far higher than manufacturing average



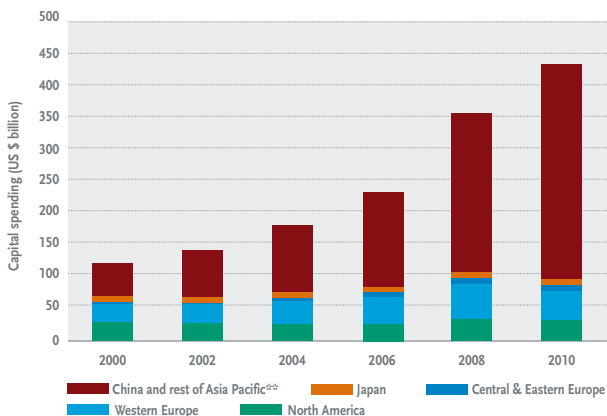
Sources: Eurostat and Cefic Analysis

Labour cost per employee in the EU chemical industry increased by 42% during the period 2000 to 2010



Sources: Eurostat and Cefic Analysis

China and the rest of Asia-Pacific attract the bulk of chemical investment*

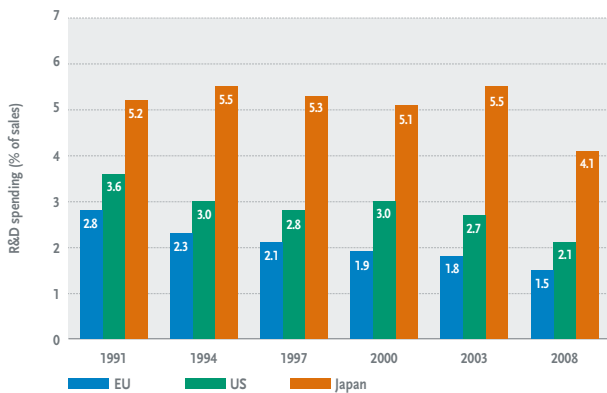


Source: American Chemistry Council (ACC)

* Including pharmaceuticals

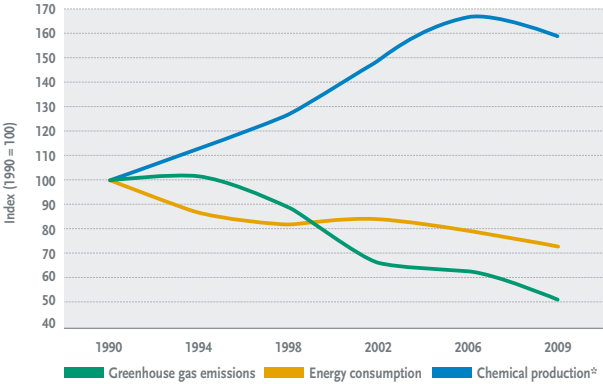
** Excluding Japan

European R&D intensity below US and Japanese levels



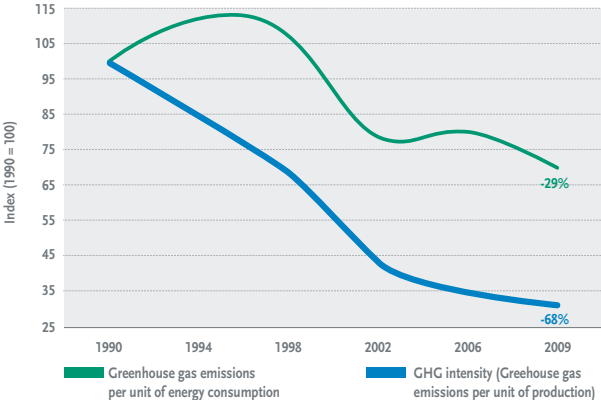
Source: Cefic Chemdata International

Chemical production decoupled from energy use



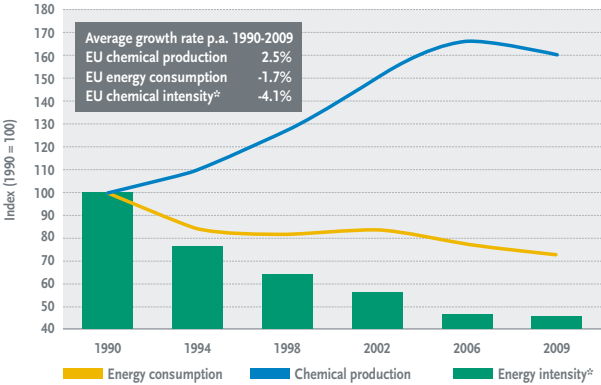
Sources: Cefic Chemdata International and European Environment Agency (EEA)
 * Including pharmaceuticals

Greenhouse gas intensity has fallen by 68% since 1990



Sources: Cefic Chemdata International and European Environment Agency (EEA)
 * Including pharmaceuticals

The EU chemical industry has reduced energy intensity by 54% since 1990



Sources: Eurostat and Cefic Chemdata International

* Energy intensity is measured by energy input per unit of chemical production (including pharmaceuticals)

Publisher

The European Chemical Industry Council, or Cefic, publishes the document each September from its office in Brussels. An important voice for the European chemical industry, Cefic represents 29,000 companies that employ about 1.2 million people.

Media enquiries

Members of the media may schedule an interview with Cefic Chief Economist Dr. Moncef Hadhri by contacting James Pieper, media relations manager, Cefic, on +32 (0)2 676 73 98 or via email at jpi@cefic.be

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Cefic - The European Chemical Industry Council

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