

# Verden ifølge BASF. Hvor er Tyskland, kemibranchen, EU henne?

Nyborg | May 8, 2025







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## Jesper Bjerregaard

Managing Director BASF A/S

Head of BTC Chemical Distribution Nordic-Baltic

23 år i BASF .... og meget stor PU fan

# Agenda

## 01

### BASF at a Glance

- General Facts
- Our Portfolio
- Performance Materials

## 02

### The European Chemical Industry

- cefic: Chemical Industry Report
- Political Environment

## 03

### BASF in the Nordic/Baltics & Polyurethanes

- BASF in the Nordic/Baltics
- Local contacts





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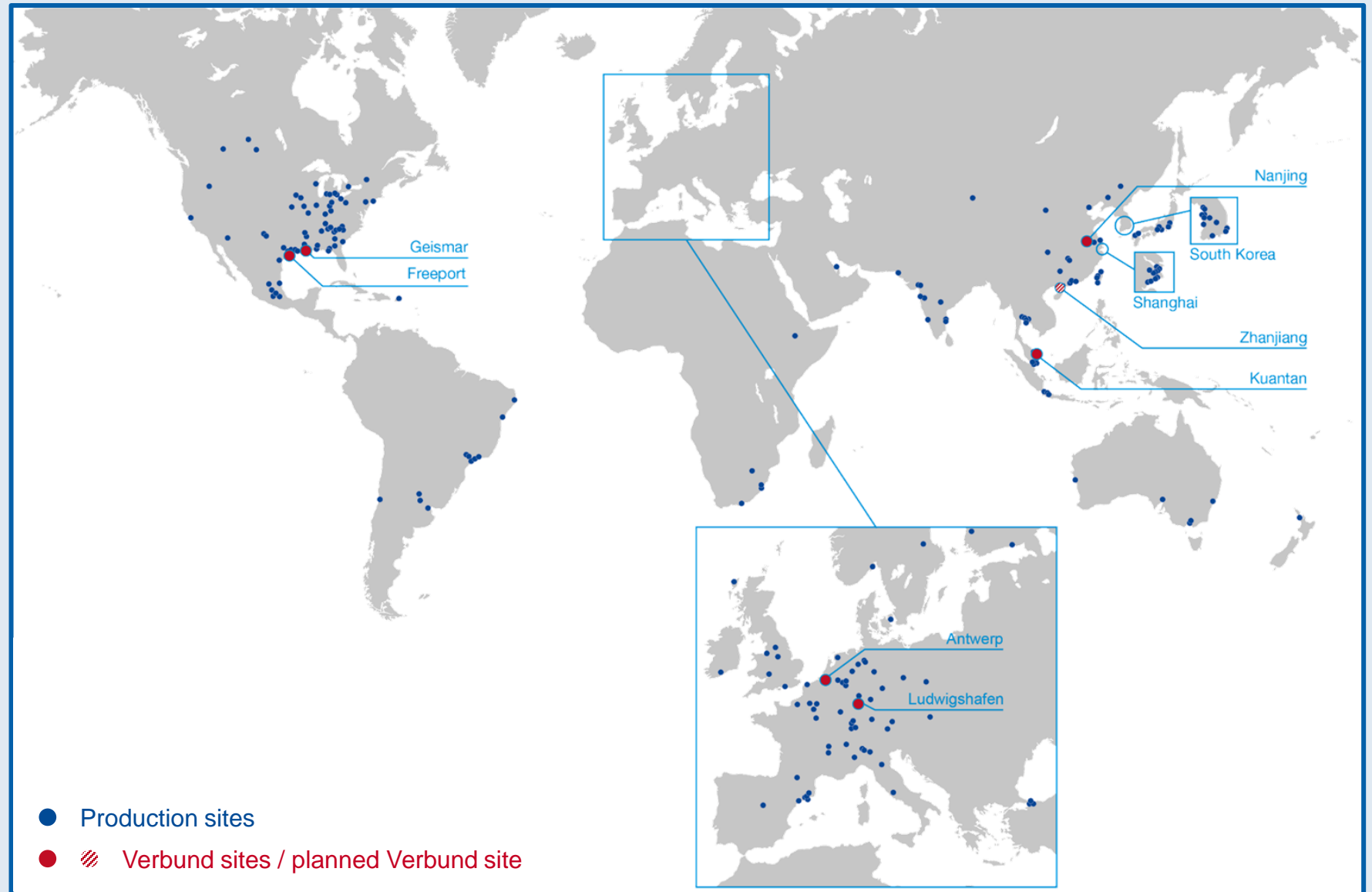


# BASF – We create chemistry

- Our chemistry is used in almost all industries
- We combine economic success with environmental protection and societal responsibility
- Sales 2024: €65.3 billion
- EBITDA before special items 2024: €7.9 billion
- Employees (as of December 31, 2024): 111,822
- 235 production sites including 6 Verbund sites
- Over 74,000 customers from various sectors in almost every country in the world



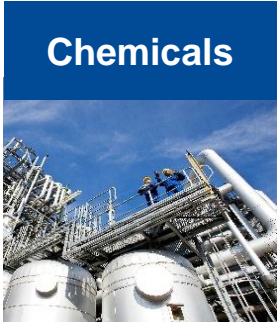
# BASF worldwide: Production and Verbund sites





# Core and Standalone businesses have different value creation levers

## Core businesses



**Chemicals**

Petrochemicals  
Intermediates



**Materials**

Performance  
Materials  
Monomers



**Industrial  
Solutions**

Dispersions  
& Resins  
Performance  
Chemicals

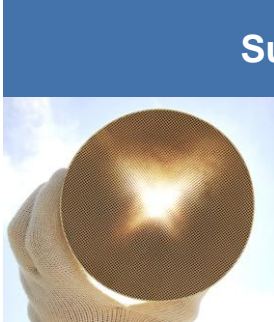


**Nutrition &  
Care**

Care Chemicals  
Nutrition & Health



## Standalone businesses



**Surface Technologies**

Environmental  
Catalyst and  
Metal Solutions



Battery  
Materials



Coatings



**Agricultural  
Solutions**

Agricultural  
Solutions

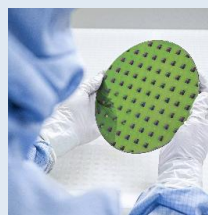
# Segment Data

## Core businesses



### Chemicals

	2024	2023
	Million €	Million €
Sales	10,838	10,369
EBITDA before special items	1,342	1,167
Segment cash flow	-2,051	-936



### Industrial Solutions

	2024	2023
	Million €	Million €
Sales	8,175	8,010
EBITDA before special items	1,161	965
Segment cash flow	868	1,292

## Materials consist of two operating divisions::

- Monomers
- Performance Materials



### Materials

	2024	2023
	Million €	Million €
Sales	13,510	14,149
EBITDA before special items	1,805	1,650
Segment cash flow	766	1,369



### Nutrition & Care

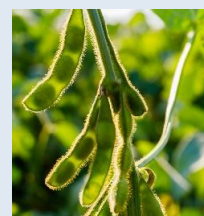
	2024	2023
	Million €	Million €
Sales	6,729	6,858
EBITDA before special items	814	565
Segment cash flow	-31	503

## Standalone businesses



### Surface Technologies

	2024	2023
	Million €	Million €
Sales	12,898	16,204
EBITDA before special items	1,375	1,520
Segment cash flow	925	1,488



### Agricultural Solutions

	2024	2023
	Million €	Million €
Sales	9,798	10,092
EBITDA before special items	1,938	2,270
Segment cash flow	1,861	1,746



# Challenges of the Chemical Industry, but *Chemistry has a Future.*





# With our “Winning Ways” strategy, we target profitable growth and value creation

## Focus



Strengthening our footprint in Asia

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## Accelerate



Getting faster and better with AI

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## Transform



Verbund enables transformation

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## Win



Foster a mindset of continuous improvement

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**We are fully committed to our climate protection targets and the transformation of the chemical industry**

**2030**

**>50%**

Share of  
**Sustainable-Future Solutions**  
of the relevant BASF sales

**2050**

**Net zero**

**Scope 1,**  
**Scope 2** and **Scope 3.1**  
CO<sub>2</sub> emissions

**Increasing demand for chemical products with sustainability attributes**



# VERBUND

# INNOVATION



# CIRCULARITY



#ourplasticsjourney #polyurethane | BASF Performance Materials  
[linkedin.com](https://www.linkedin.com)



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cefic

# The European Chemical industry Facts and Figures 2024

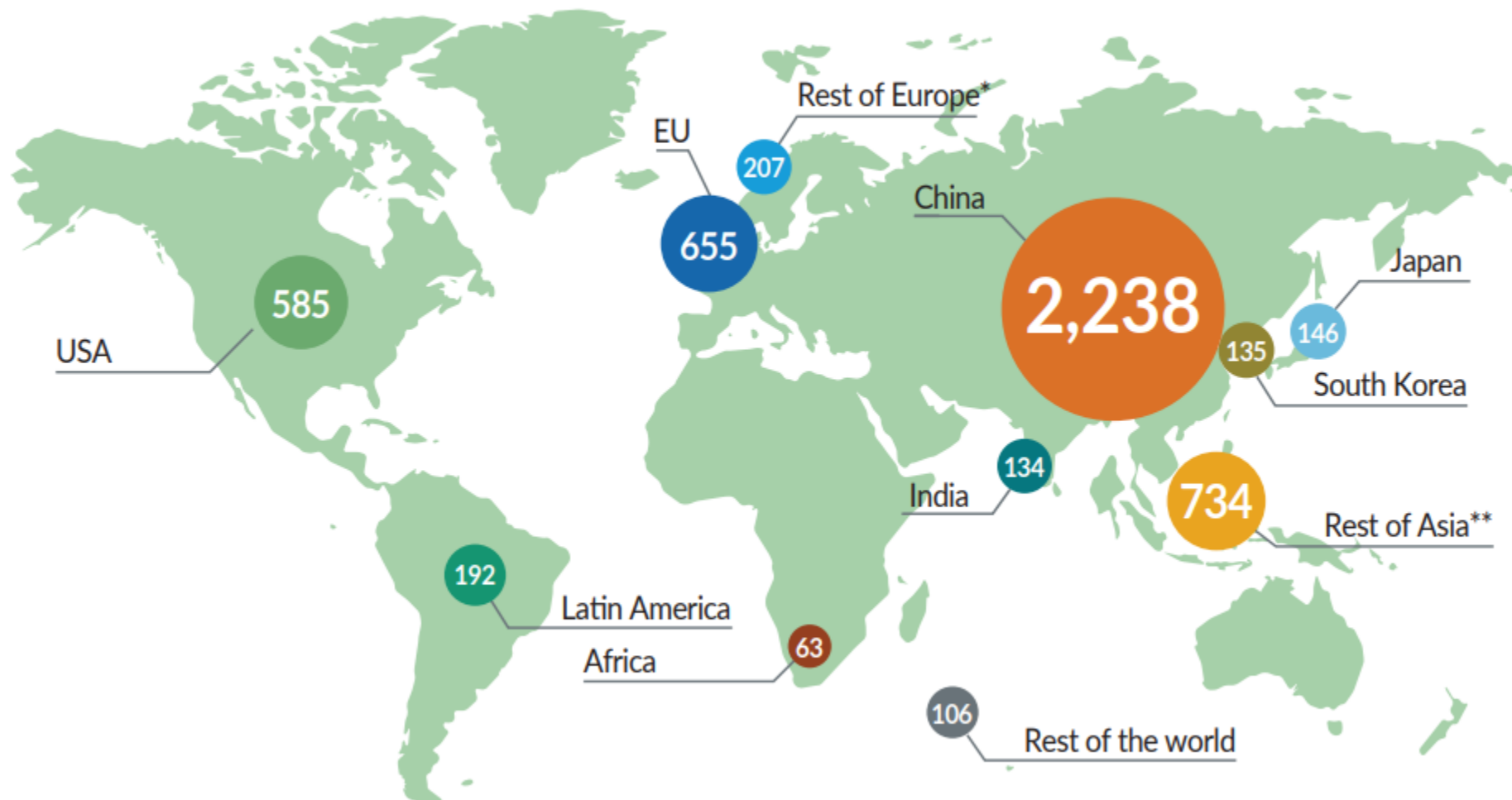
A vital part of Europe's Future

January 2025



# Europe is the second-largest chemical producer in the world

## World chemical sales (2023, €5,195 billion)



Source: Cefic Chemdata International

\*Rest of Europe covers UK, Switzerland, Norway, Turkey, Russia and Ukraine

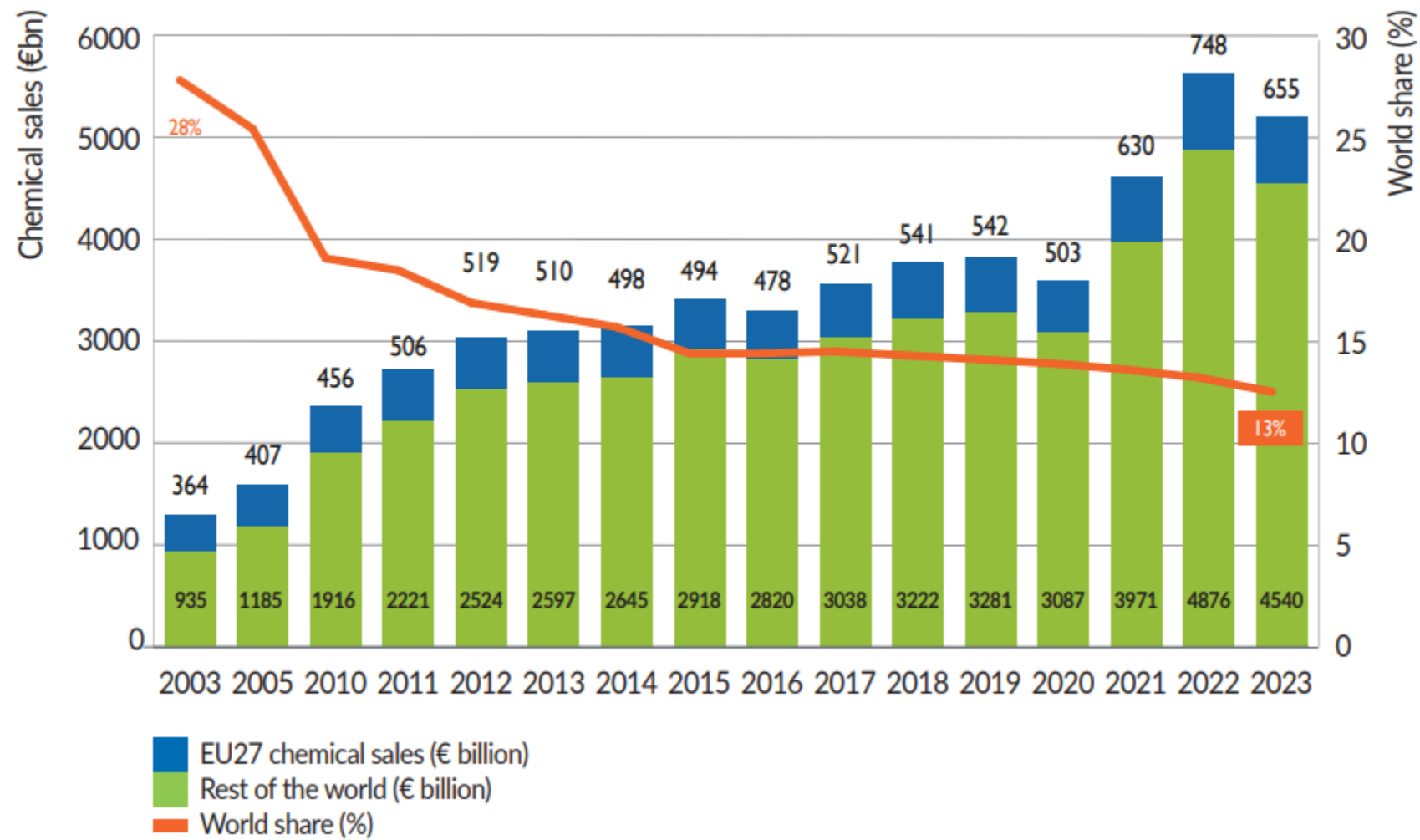
\*\*Asia excluding China, India, Japan and South Korea

Unless specified, chemical industry excludes pharmaceuticals  
Unless specified, EU refers to EU 27



Over 20 years, the EU27 share of global chemical market dropped sharply

EU27 share of global chemical market

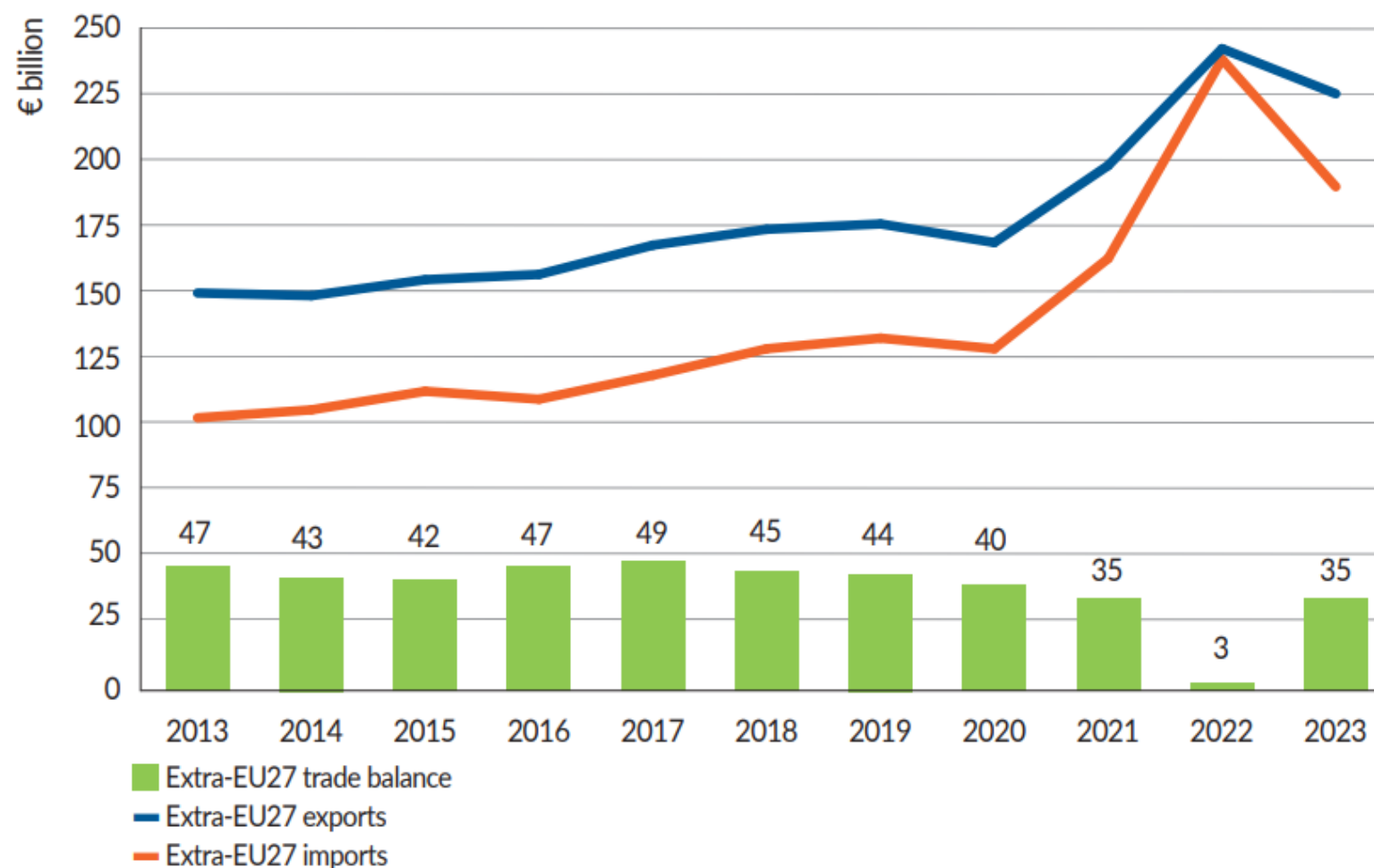


Source: Cefic Chemdata International



# EU27 chemical trade surplus bounced back to 2021 levels

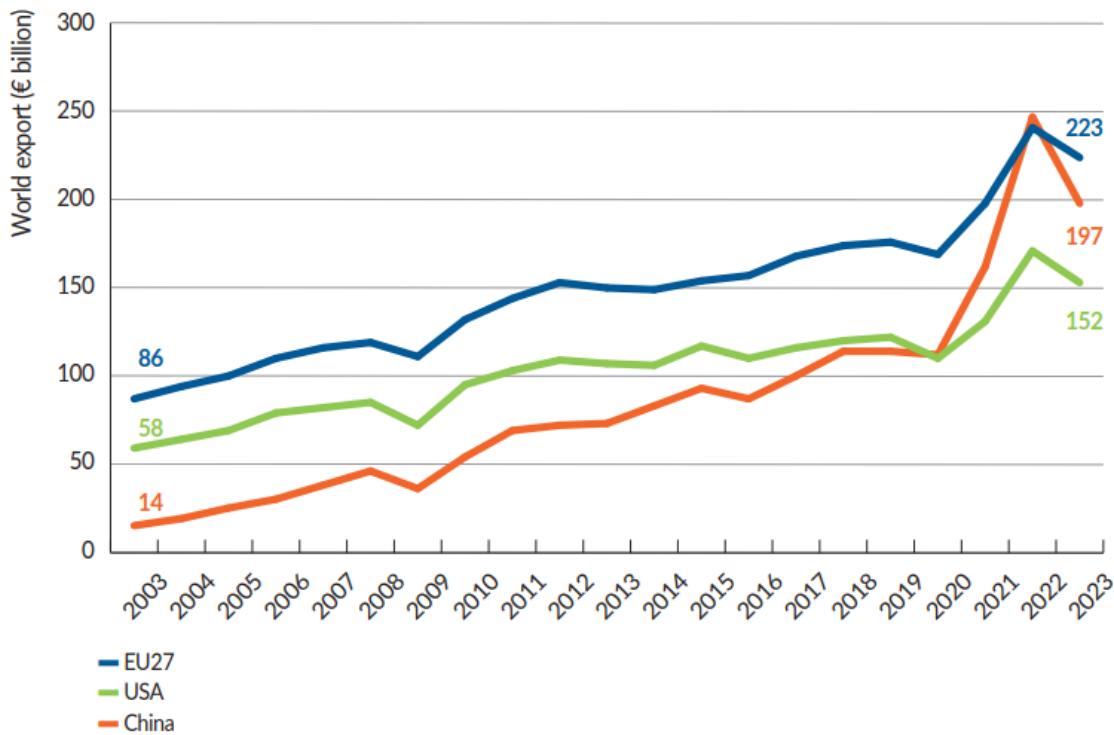
## Extra-EU27 chemicals trade balance



Source: Cefic Chemdata International

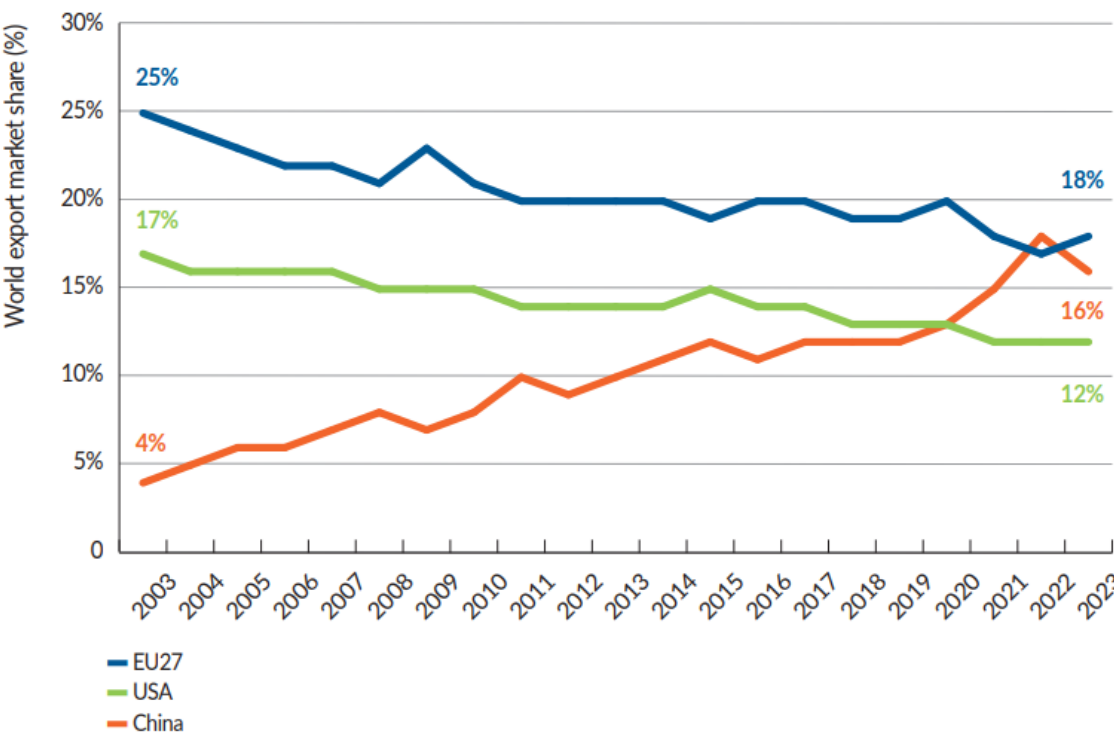
# China continues to gain share in the global chemical export

Chemical exports by region: EU27, China and USA



Source: Cefic Chemdata International based on Eurostat/UNCTAD

Share of world chemical exports: EU27, China and USA



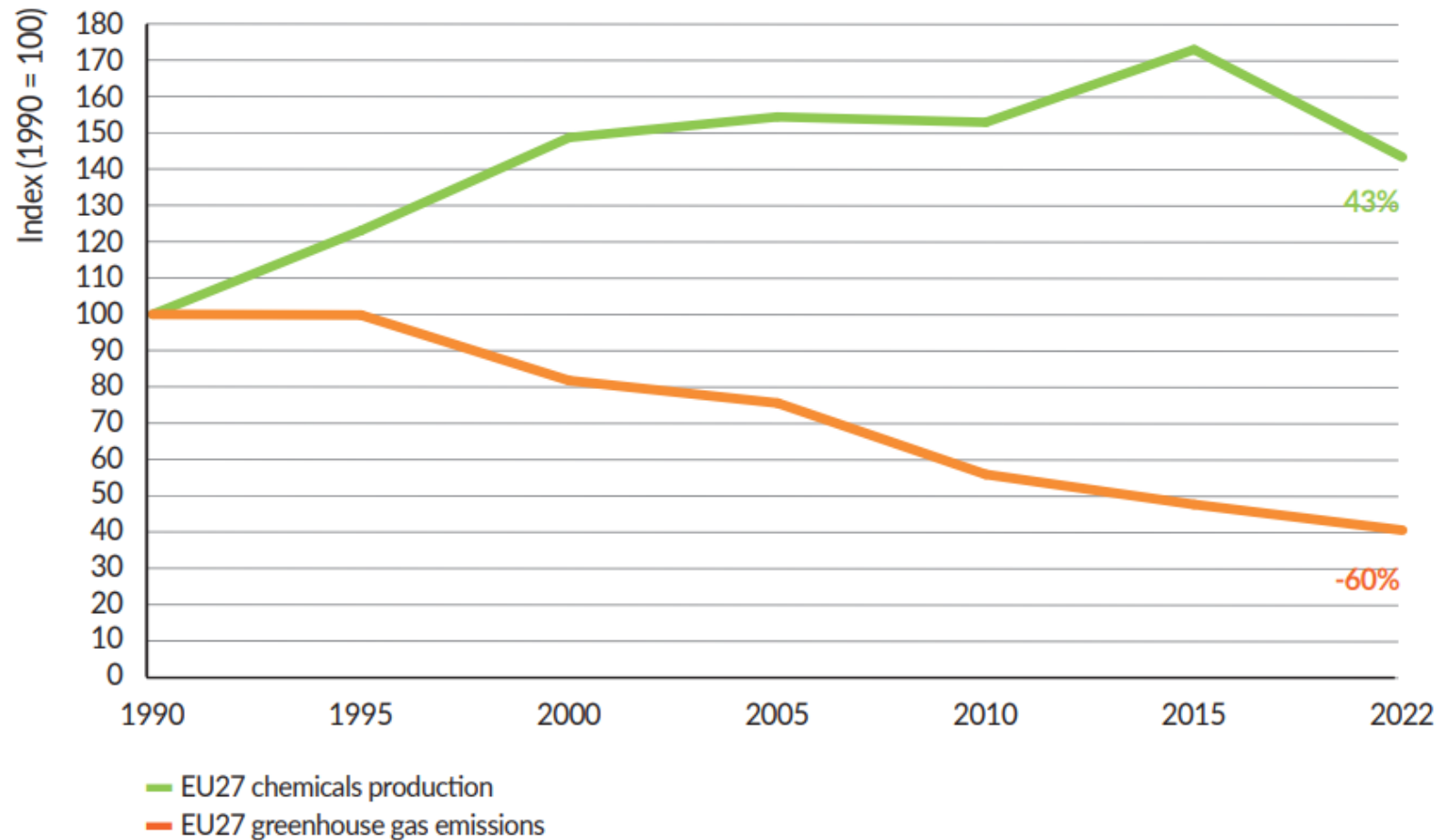
Source: Cefic Chemdata International based on Eurostat/UNCTAD





# EU27 chemical production and greenhouse gas emissions decouple

## Total GHG emissions and production in the EU27 chemical industry



Source: European Environment Agency (EEA)

# Political environment

## European competitiveness

- Draghi report
- Energy prices
- Clean Industrial Deal
- Chemicals Industry Package

## Legislation

- REACH revision
- CLP
- PFAS

## Sustainability

- GSRD
- Circular economy
- Mass balance standardization
- Chemical recycling

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# BASF in Nordic/Baltic

 ~ 2,200 customers (2023)

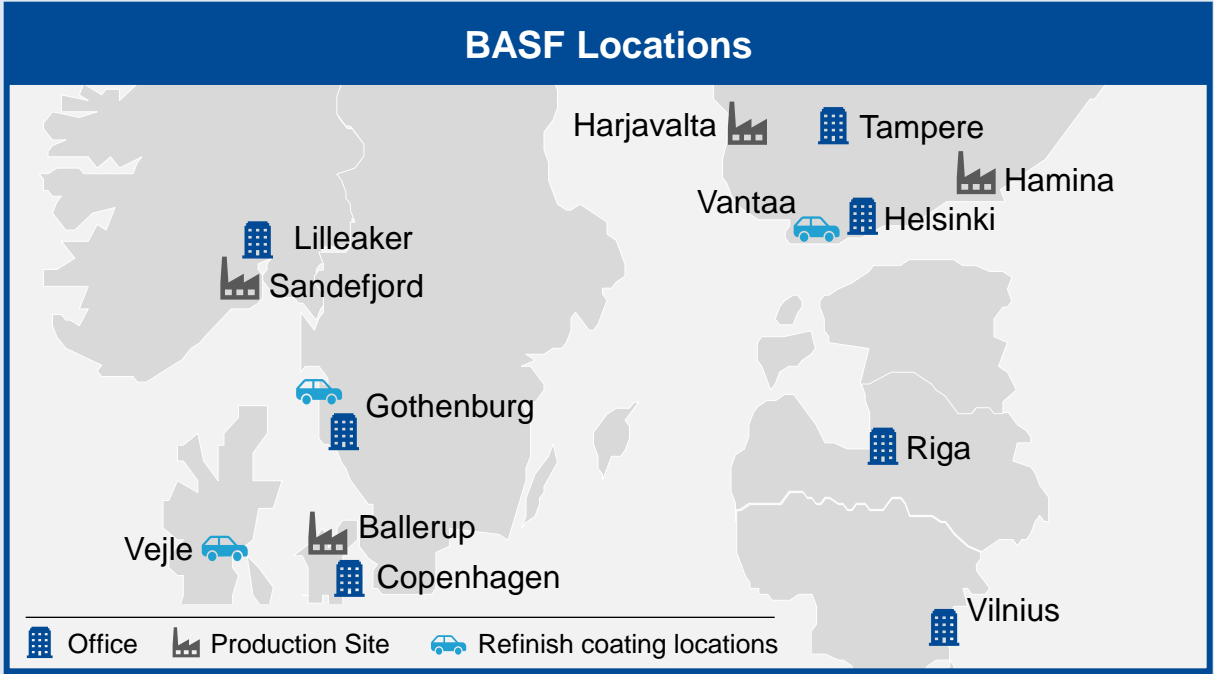
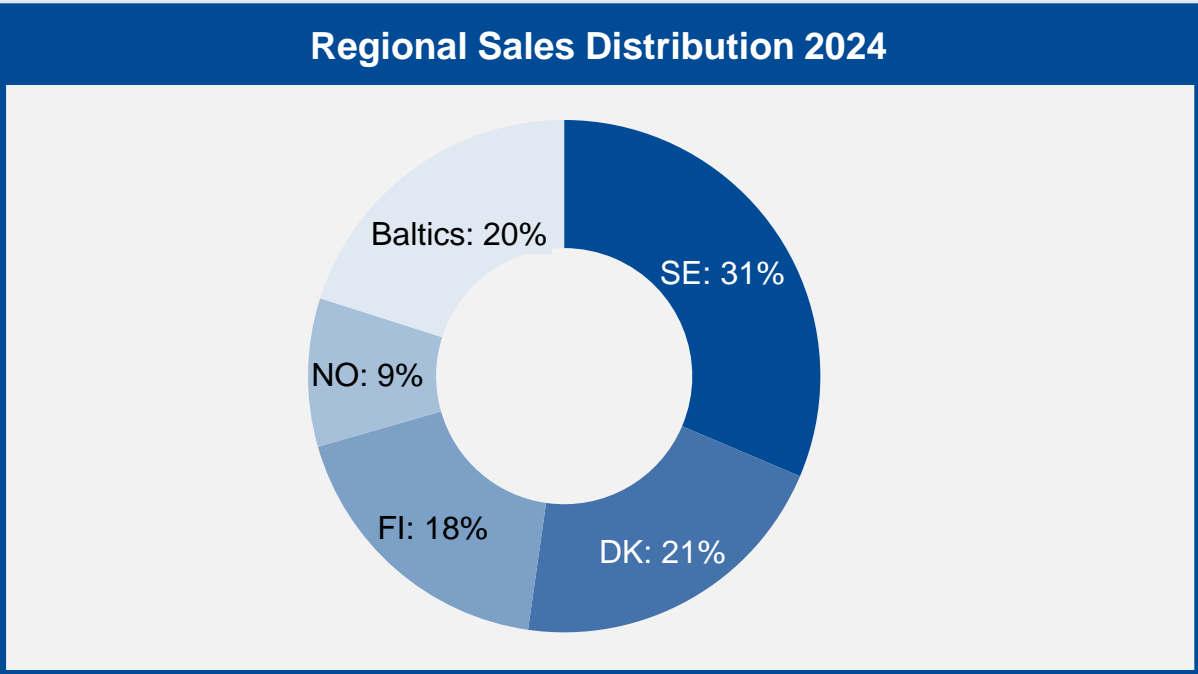
 Nearly all 75 BASF Businesses present

 Active Research Collaborations

 Investments in all productions sites

Business Areas

Agriculture, Pulp & Paper, Coatings, Consumer Goods, Chemicals, Automotive, Construction, Nutrition & Pharma



# How to reach us in the Nordics



Raw Materials

**Andy Taylor**

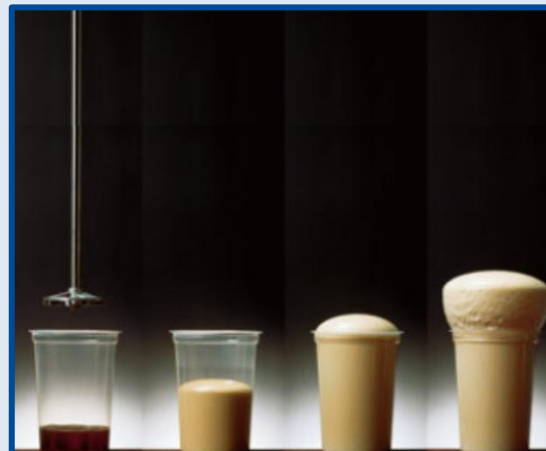
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# Very broad product portfolio for PU raw materials

## Isocyanates:

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- Monomeric MDI
- Polymeric MDI
- MDI Prepolymers & Mixtures
- TDI
- Aliphatic and hydrophilically-modified HDI cross-linkers (Basonat®)

## Polyols:

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- Propylene Glycol Polyols
- Reactive Polyether Polyols
- Reactive and Non-Reactive Polyether Polyols
- Reactive and Non-Reactive Polymer Polyols
- Amine-based Polyether Polyols
- Rigid Polyether Polyols & Mixtures
- Polyester Polyols

## Natural oil-based polyols

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- Polyether/ester Polyols (Sovermol®)

## Catalysts:

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- Amine catalysts (Lupragen®)
- Imidazoles

## Additives:

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- Formulation additives, light stabilisers, processing aids and stabilisers, cross-linkers and chain extenders, anti-statics, plasticisers, flame retardants, PolyTHF®, etc.



# Strong position in PU Systems

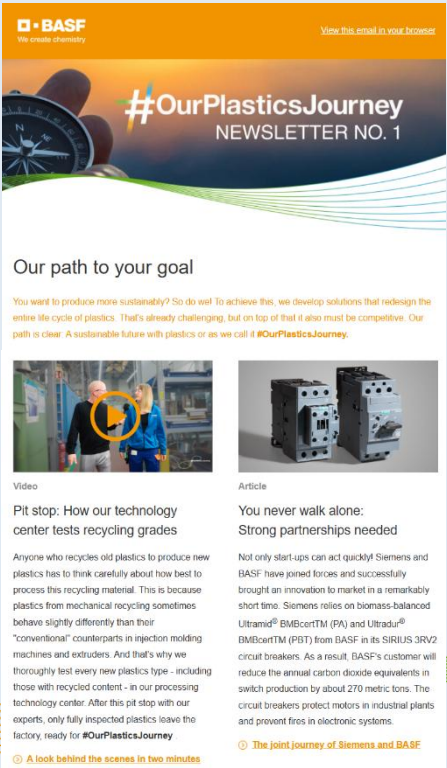
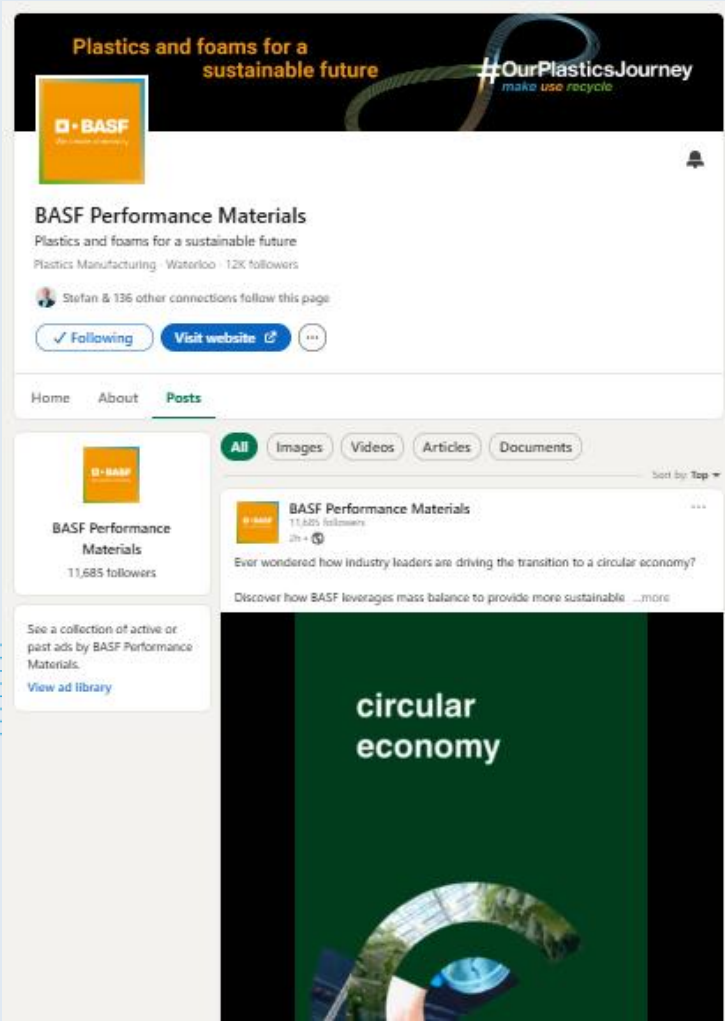


- ① Polyurethane Systems offer **versatile chemistry**. With basic components, a polyol blend and isocyanate, **different properties** can be achieved for use in a wide range of industries.
- ② Our **know-how** builds on 60 years of experience to create tailor-made recipes to meet **customer needs**. We take on the challenge to improve how plastics are made and push the latest **sustainability** standards.
- ③ We **co-create** solutions with our customers, **from the earliest stage** of product development, through materials and designs by using the latest visualization tools **to the final production**.

# #OurPlasticsJourney is also yours!

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We create chemistry