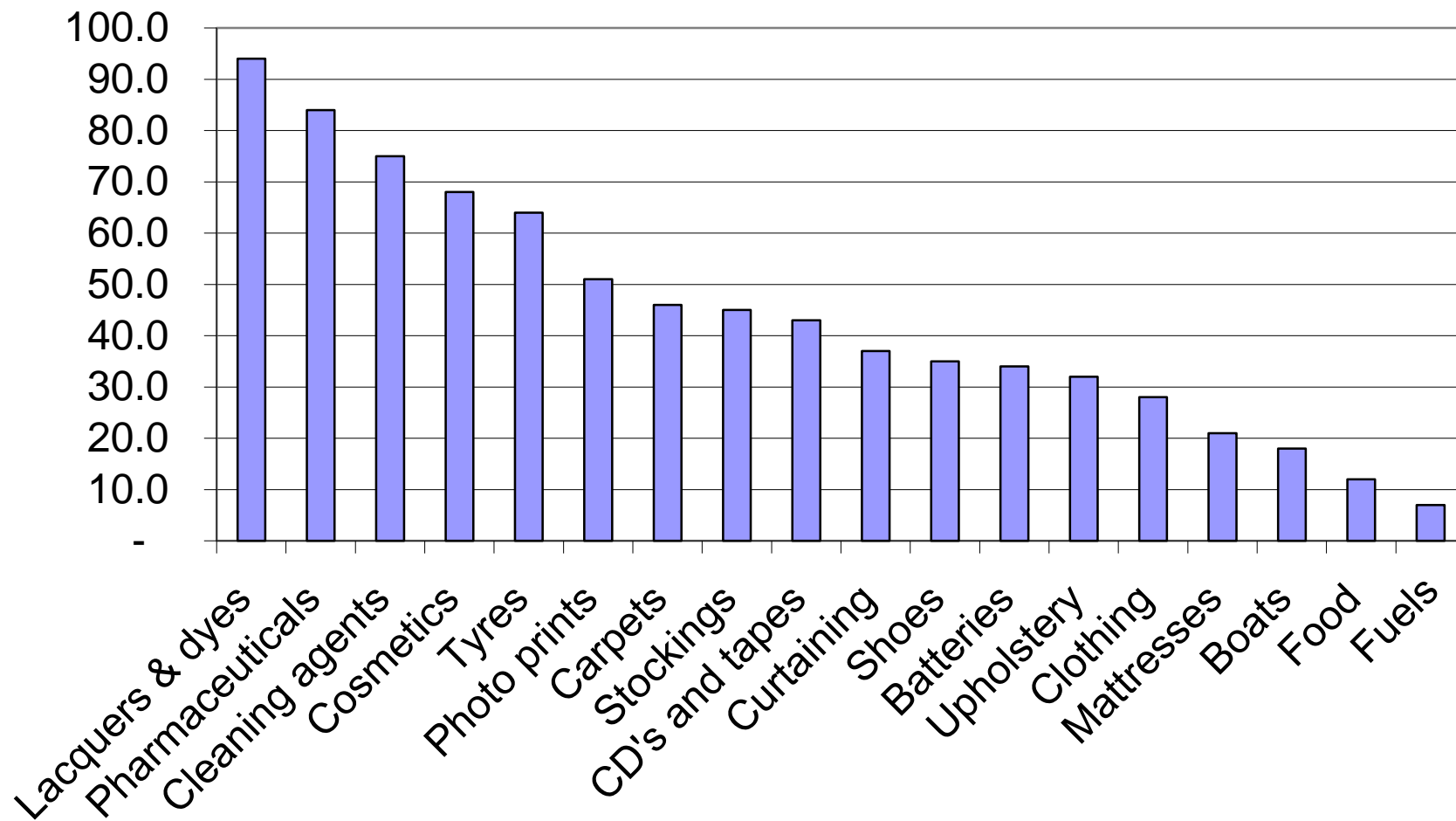


The Swiss Chemical and Pharmaceutical Industry

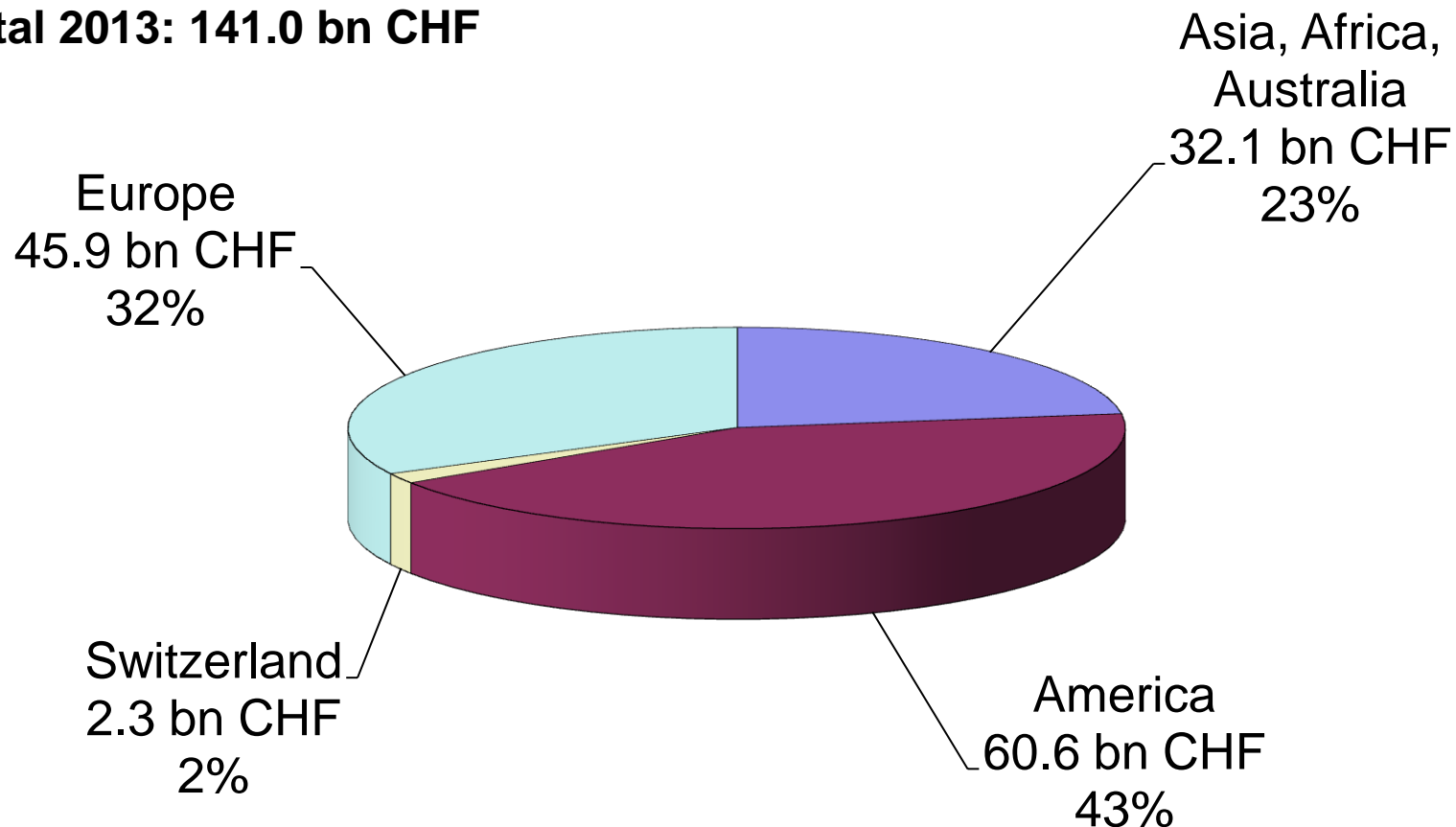
Chemicals in Consumer Products



World-wide sales

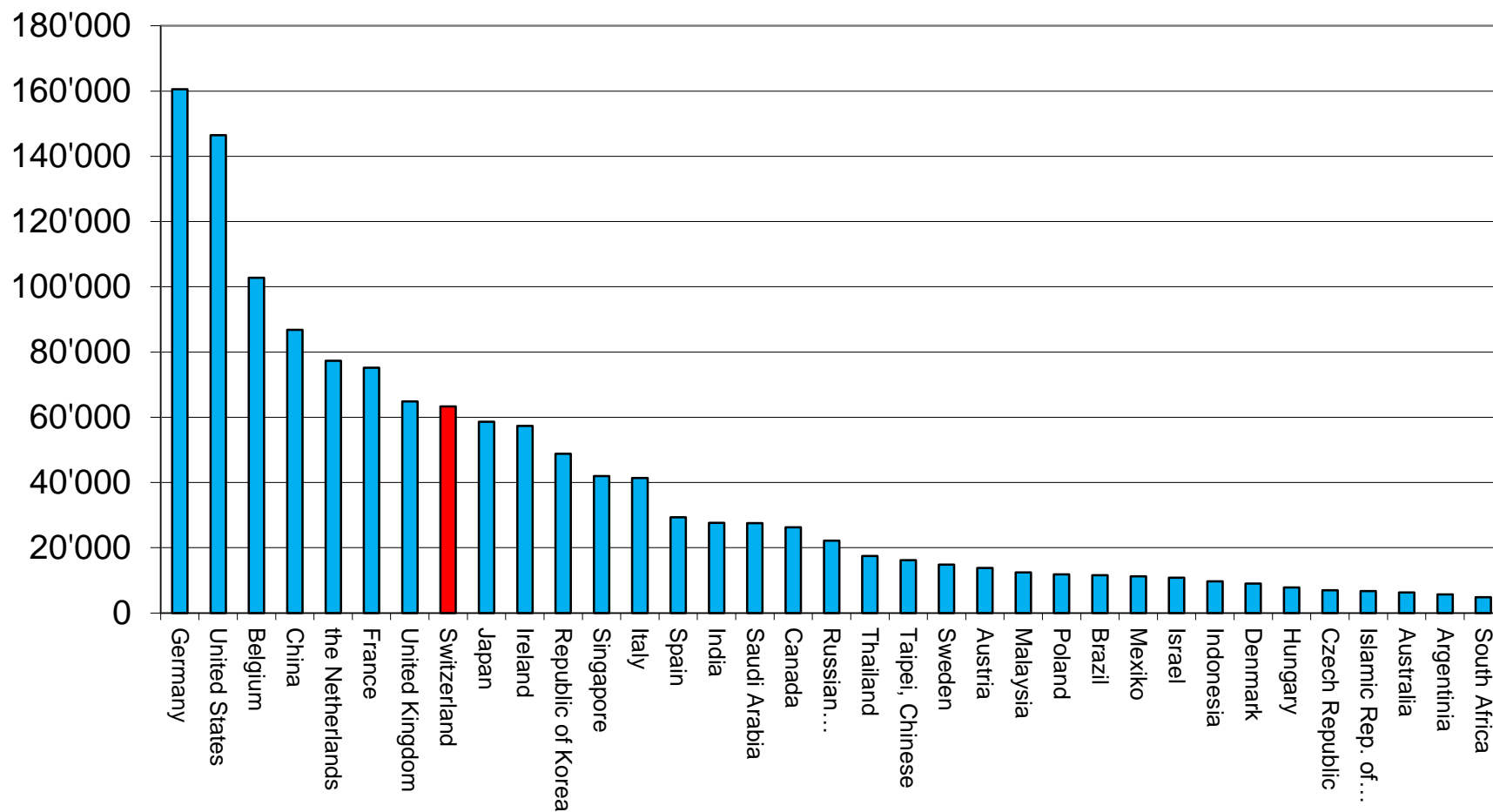
"top ten" Swiss chemical and pharmaceutical companies

Total 2013: 141.0 bn CHF



Leading Chemical Export Nations 2012

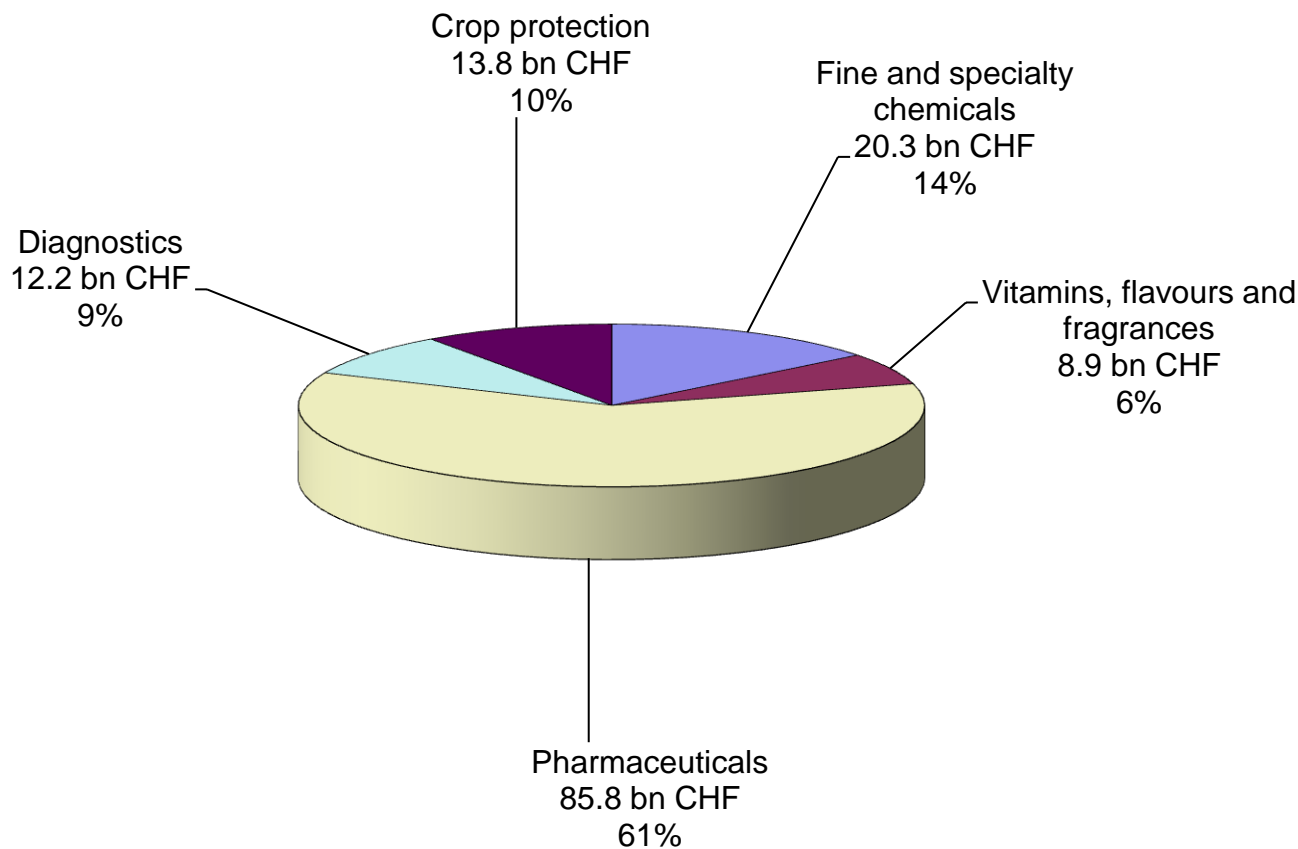
billion EUR



Focus on life science and chemical specialties

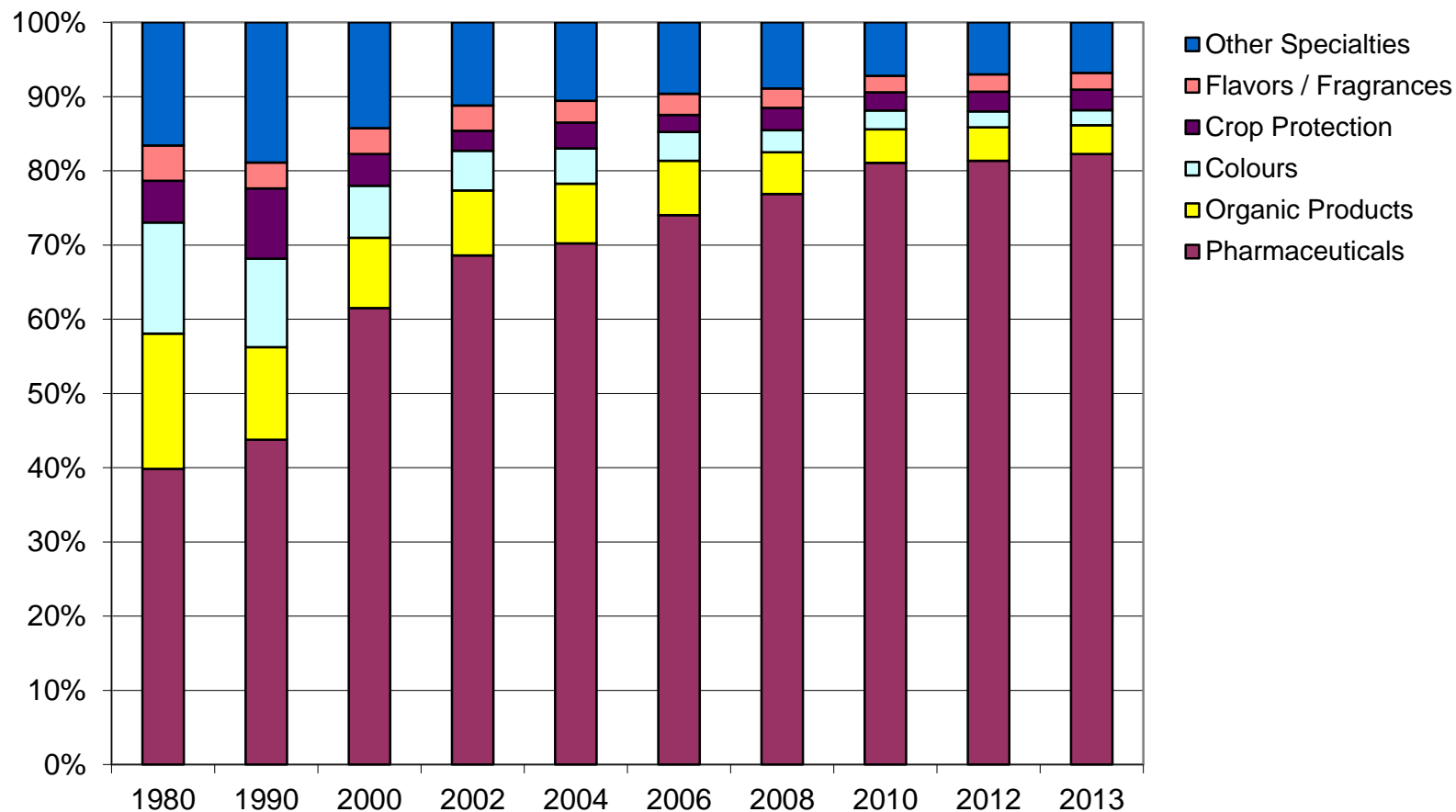
World-wide sales of the "top ten" Swiss companies

Total 2013: 141.0 bn CHF



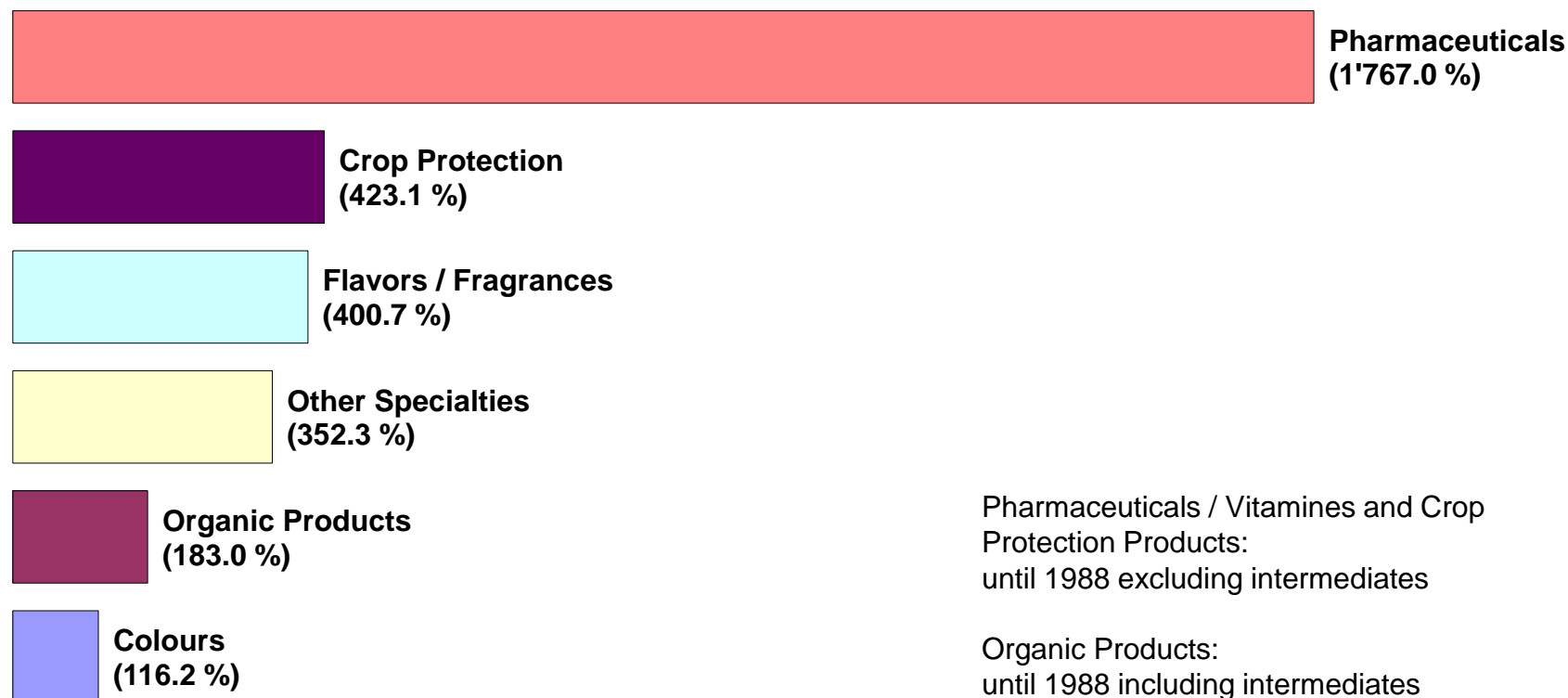
Increasing trend towards pharmaceuticals

Share of the specialties in the total exported volume



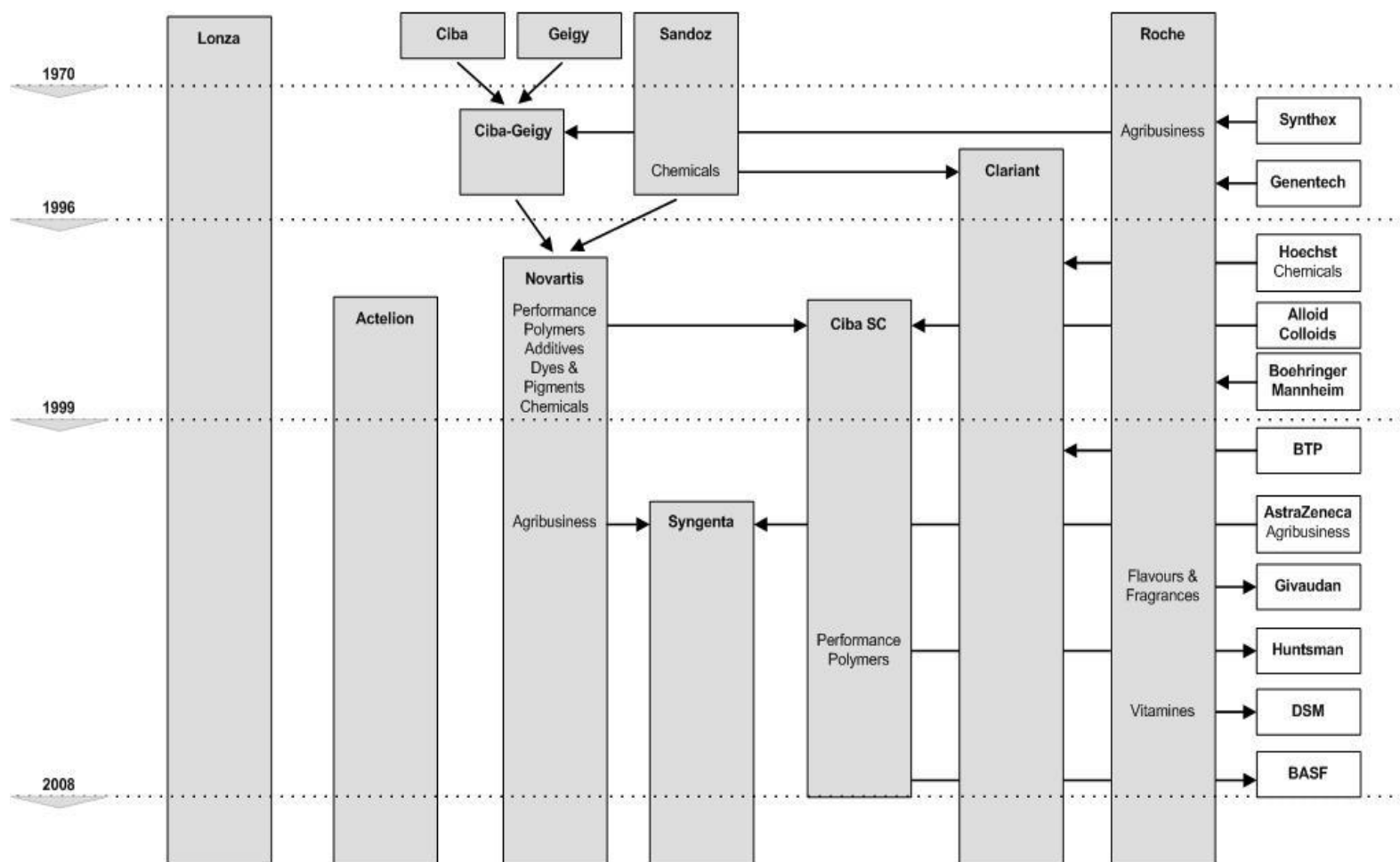
Export Growth of Sectors 1980 - 2013

1980 = 100 %



Increased focus of the companies

Industry restructuring illustrated by the Basle based chemical companies (1970 – 2010)



Quelle: SGCI Chemie Pharma 2010

Worldwide Presence

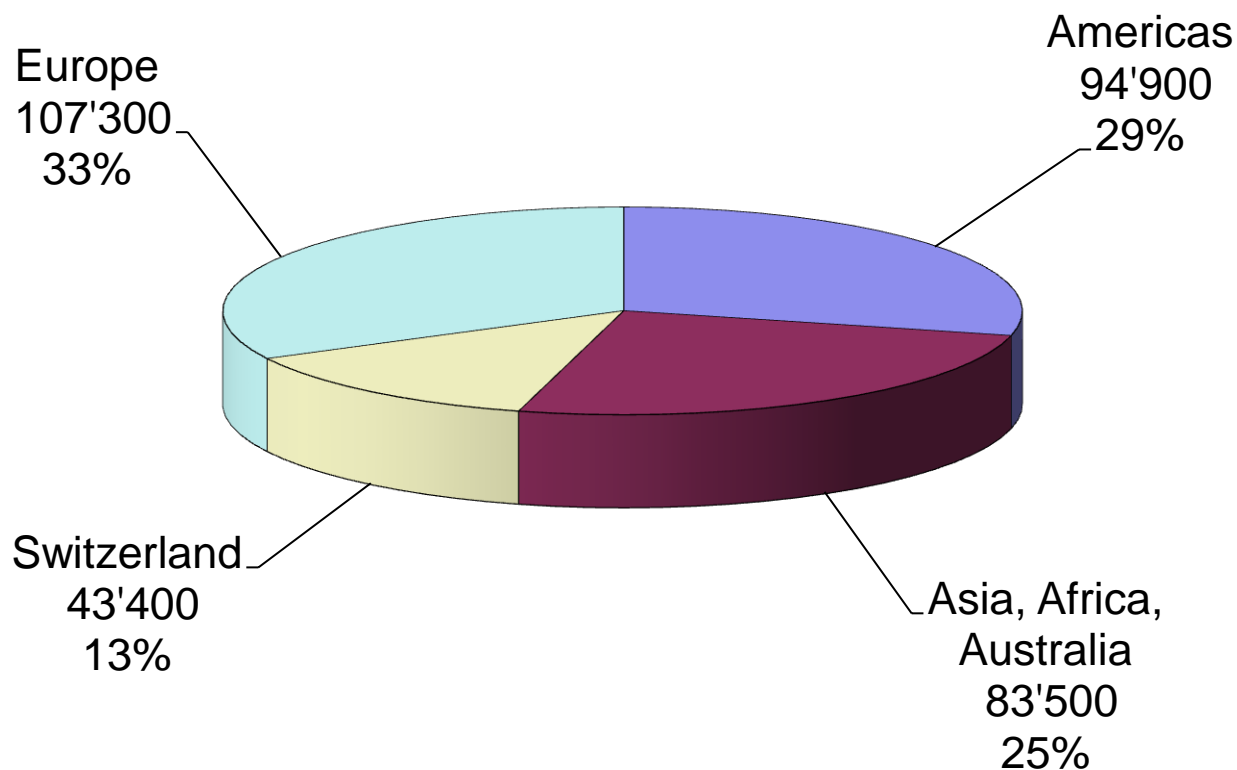
World map of direct investments



Employees abroad

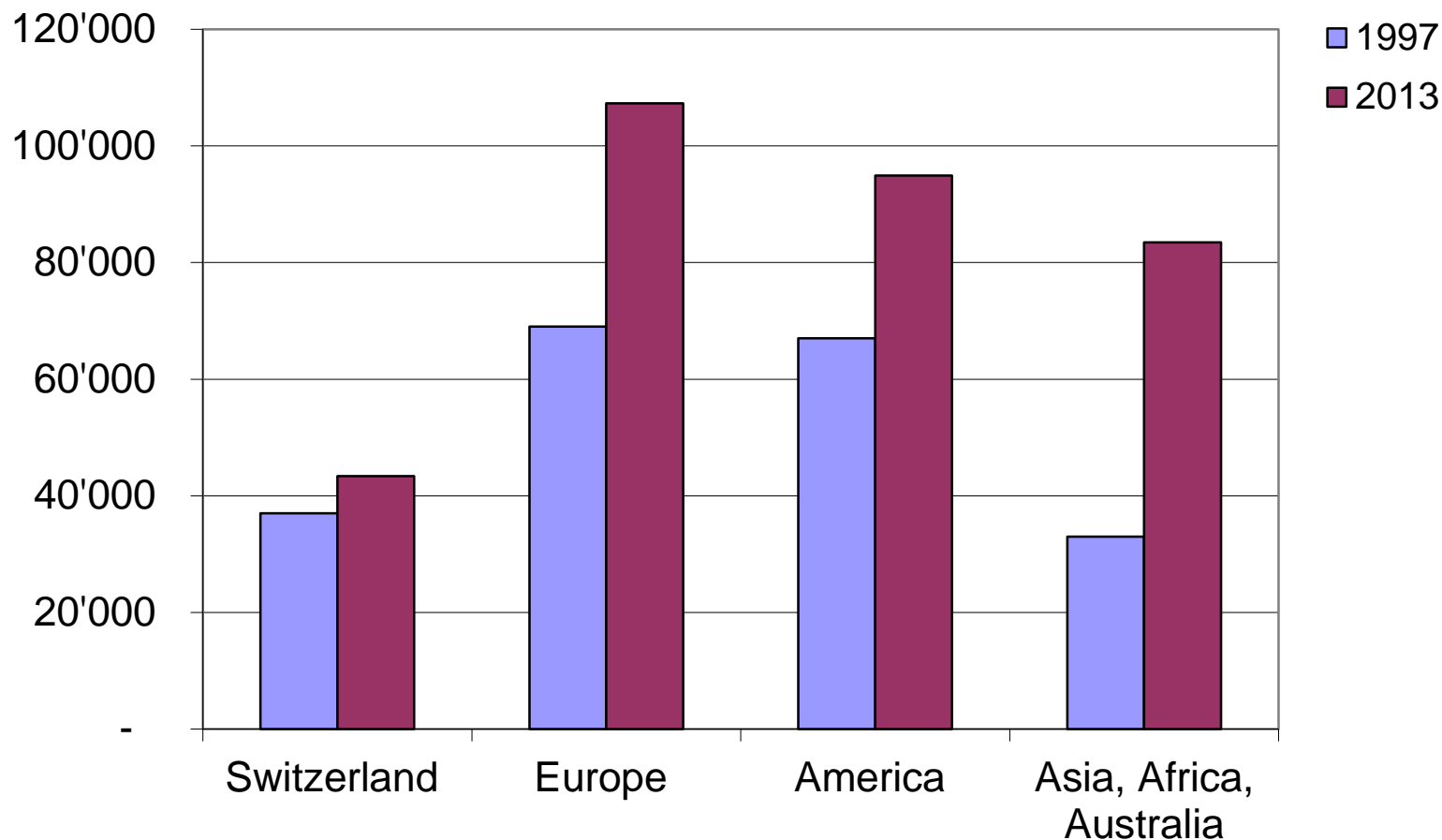
Employees of the "top ten" companies by region

Total 2013: 329'100 employees



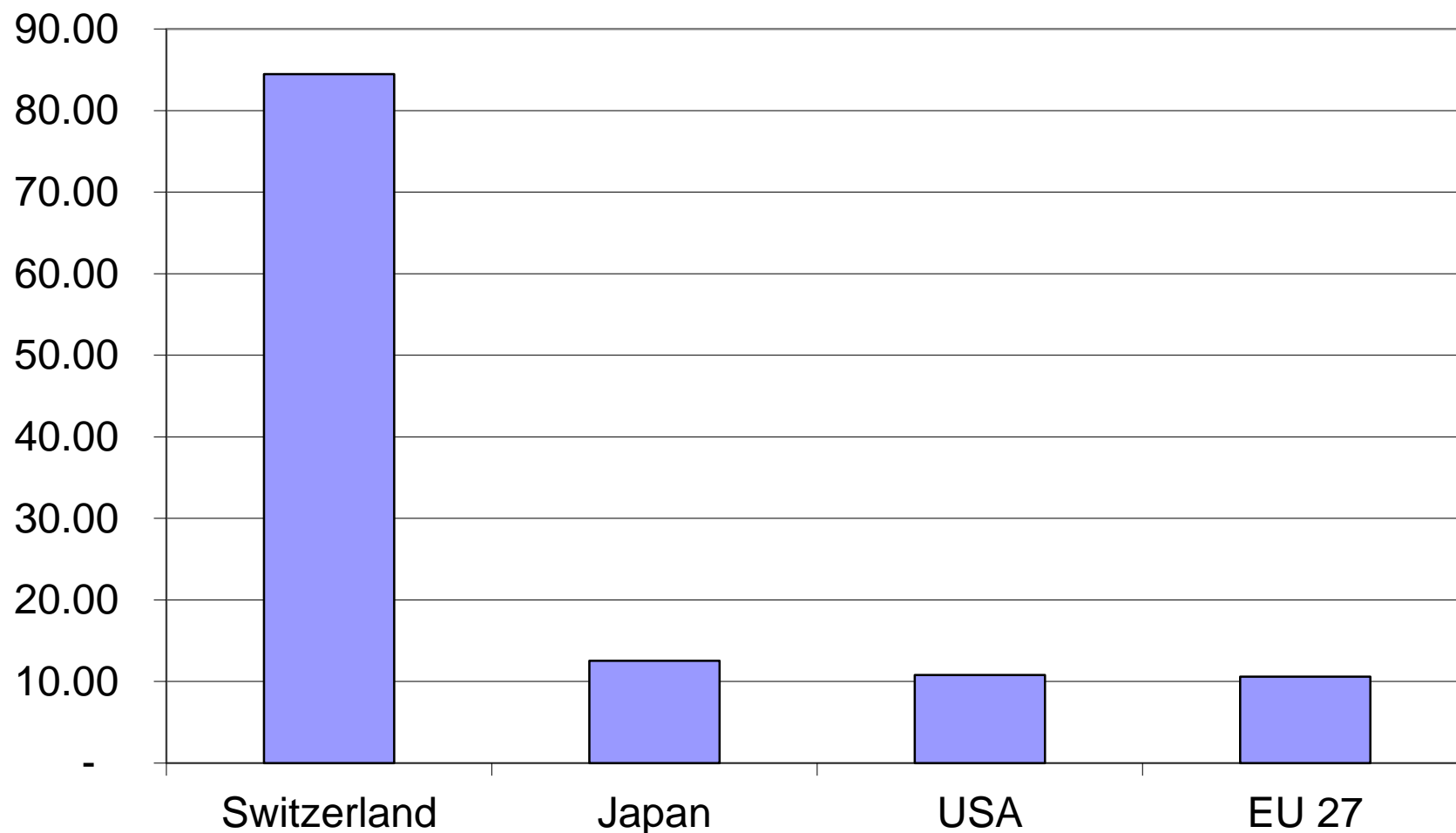
Growing importance of direct investments abroad

Development of headcount of the "top ten" companies by region



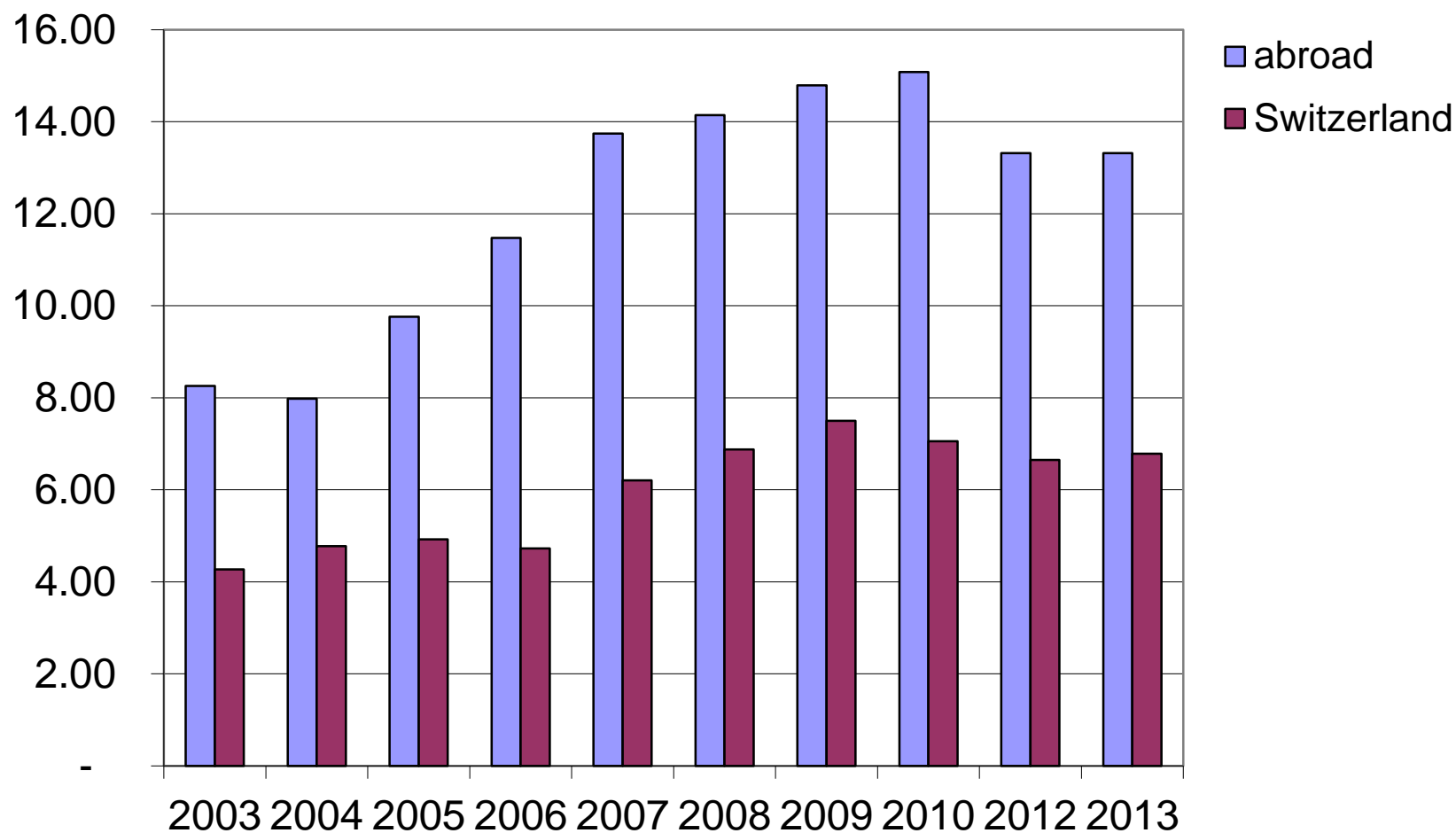
High research intensity

International comparison of research intensity (Pharma R&D / turnover) in 2011



Internationally integrated research R & D expenditures

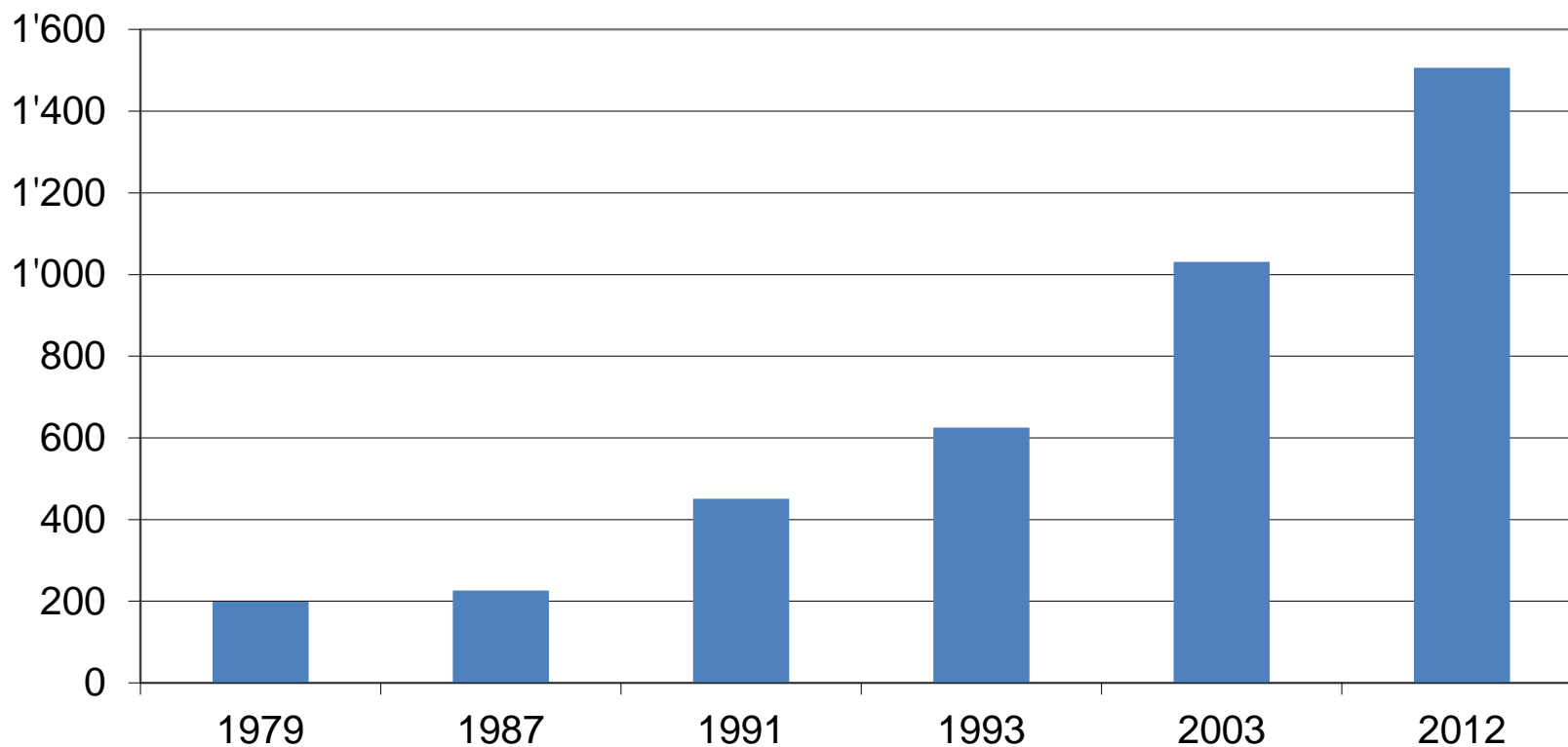
Total 2013: 20.1 bn CHF



Rapidly rising cost of R & D

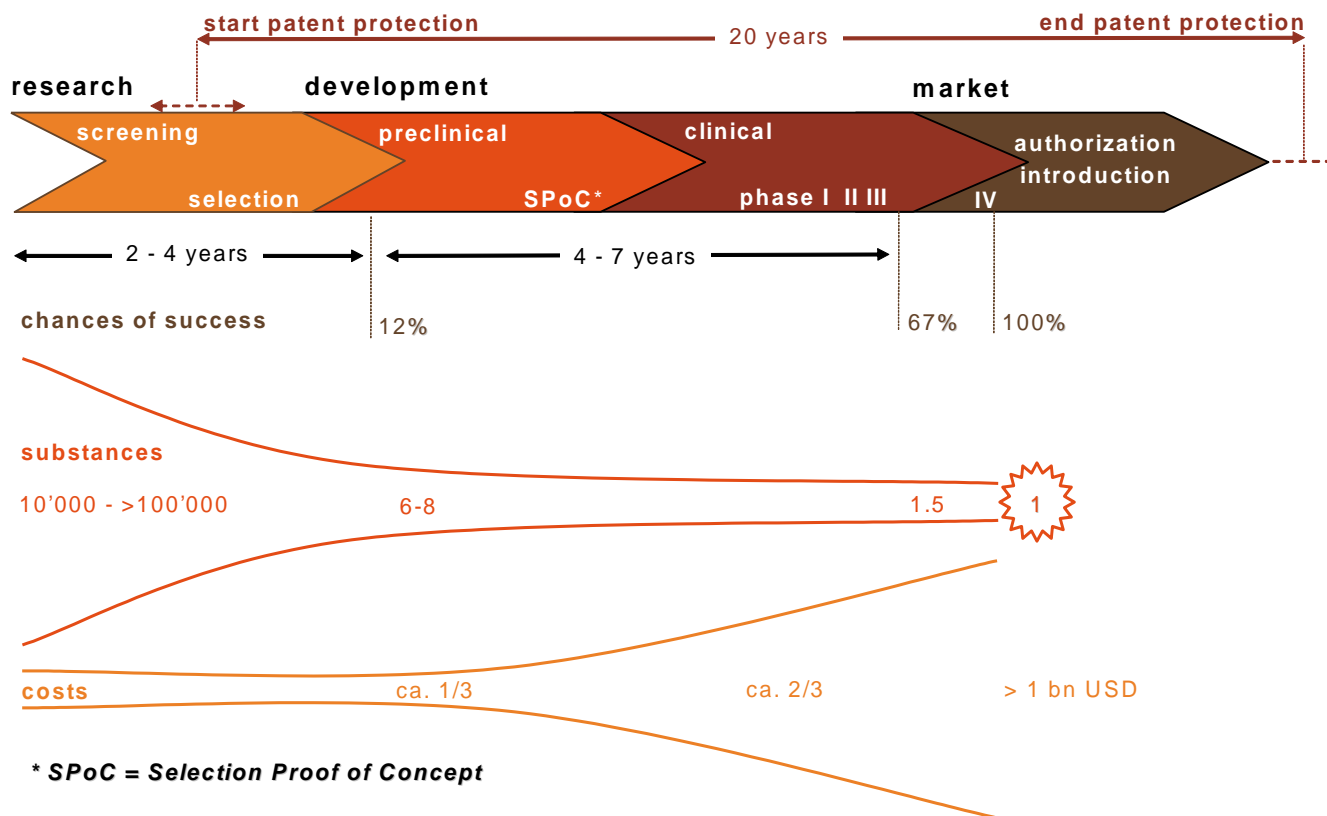
R & D cost for an new pharmaceutical molecule (NCBE)

in Mio. US \$



Patent protection

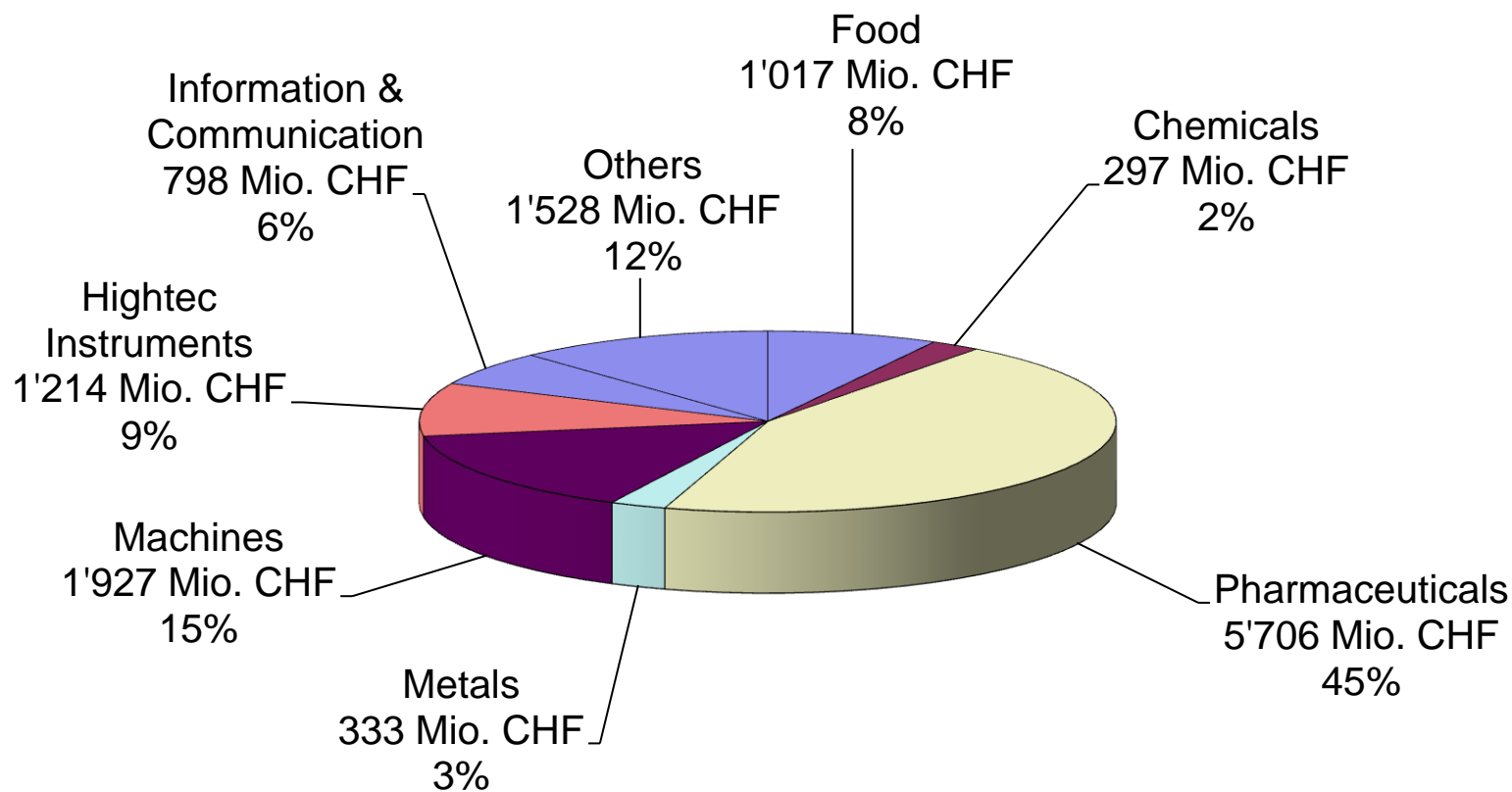
The market introduction of a pharmaceutical takes time and money



R&D expenditures in Switzerland

Private research expenditures

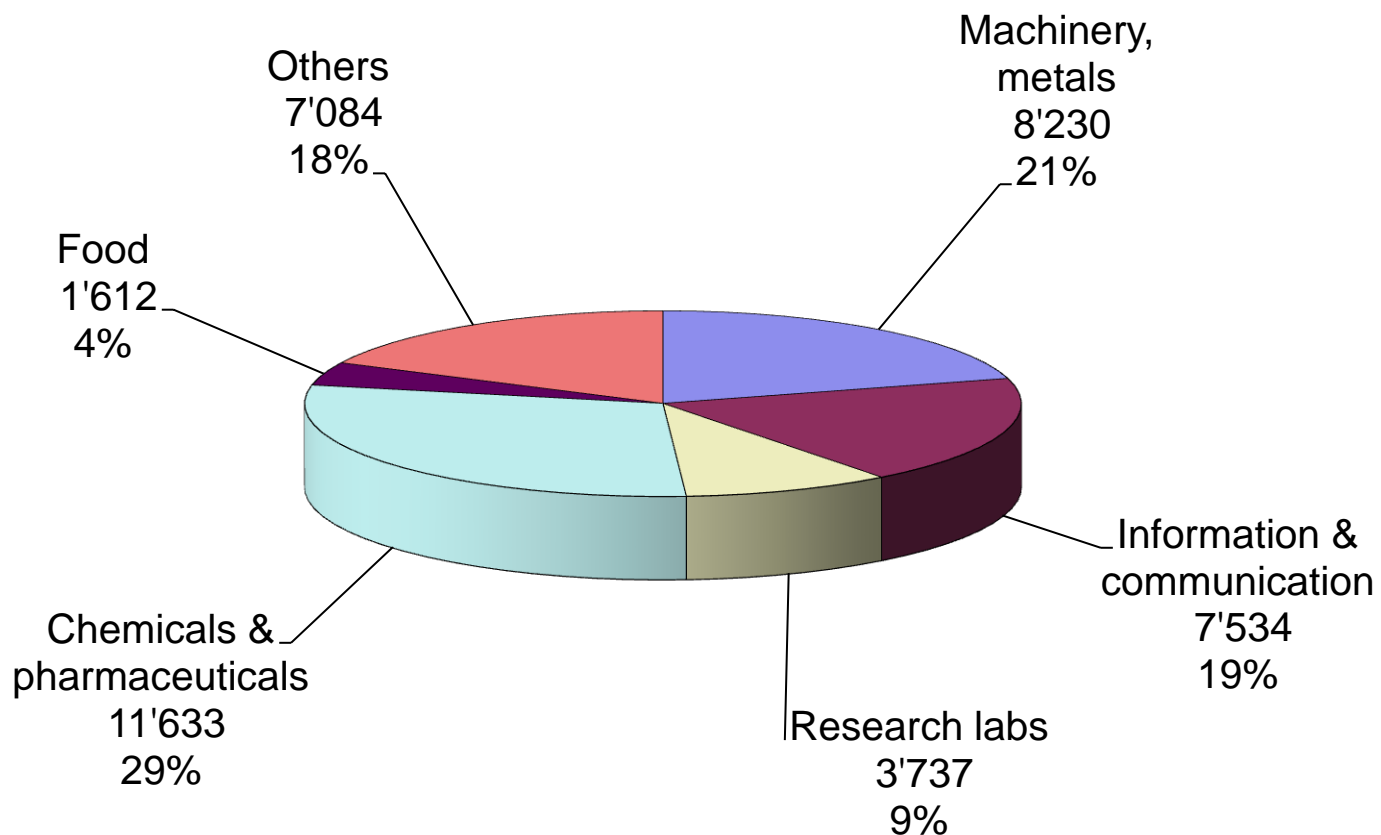
Total 2012: 12.8 bn CHF (intramuros)



Employees in R&D in Switzerland

Research staff in the industry

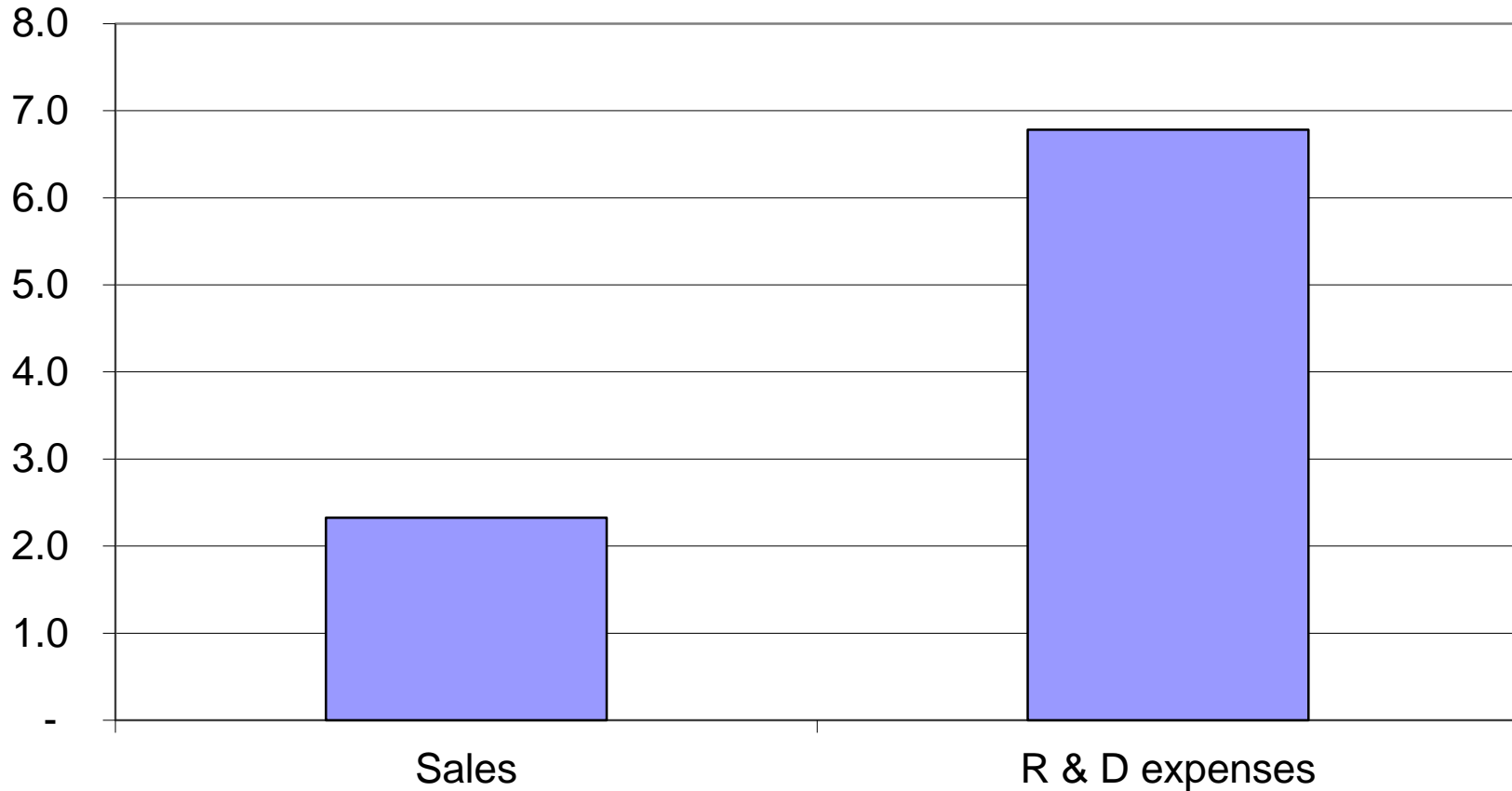
Total 2008: 39'830 employees



Exports are financing R&D in Switzerland

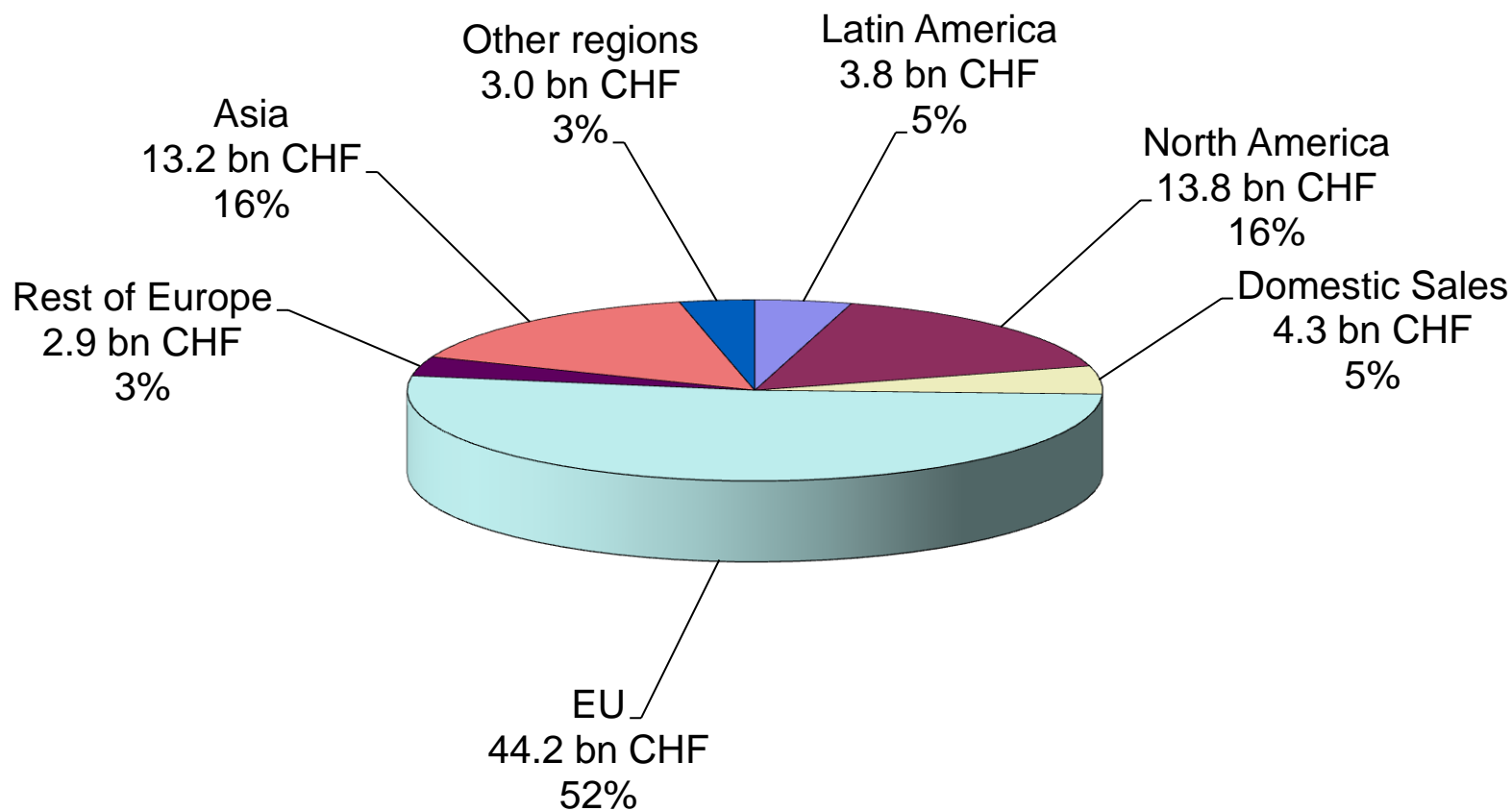
Financing deficit of the "top ten" Swiss companies (2012)

in billion CHF



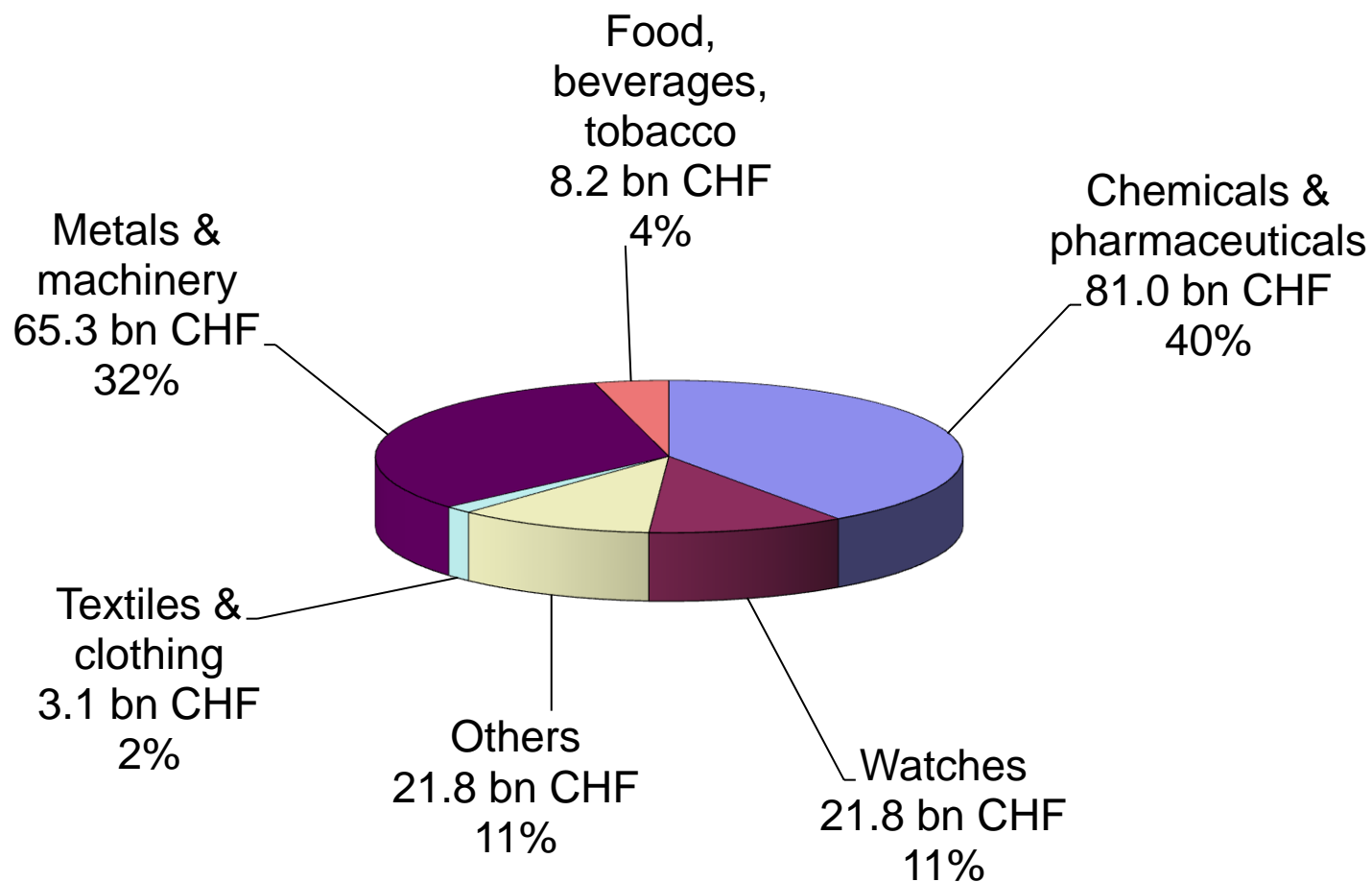
Strong dependency on exports

Total exports and domestic sales 2013: 85.2 bn CHF



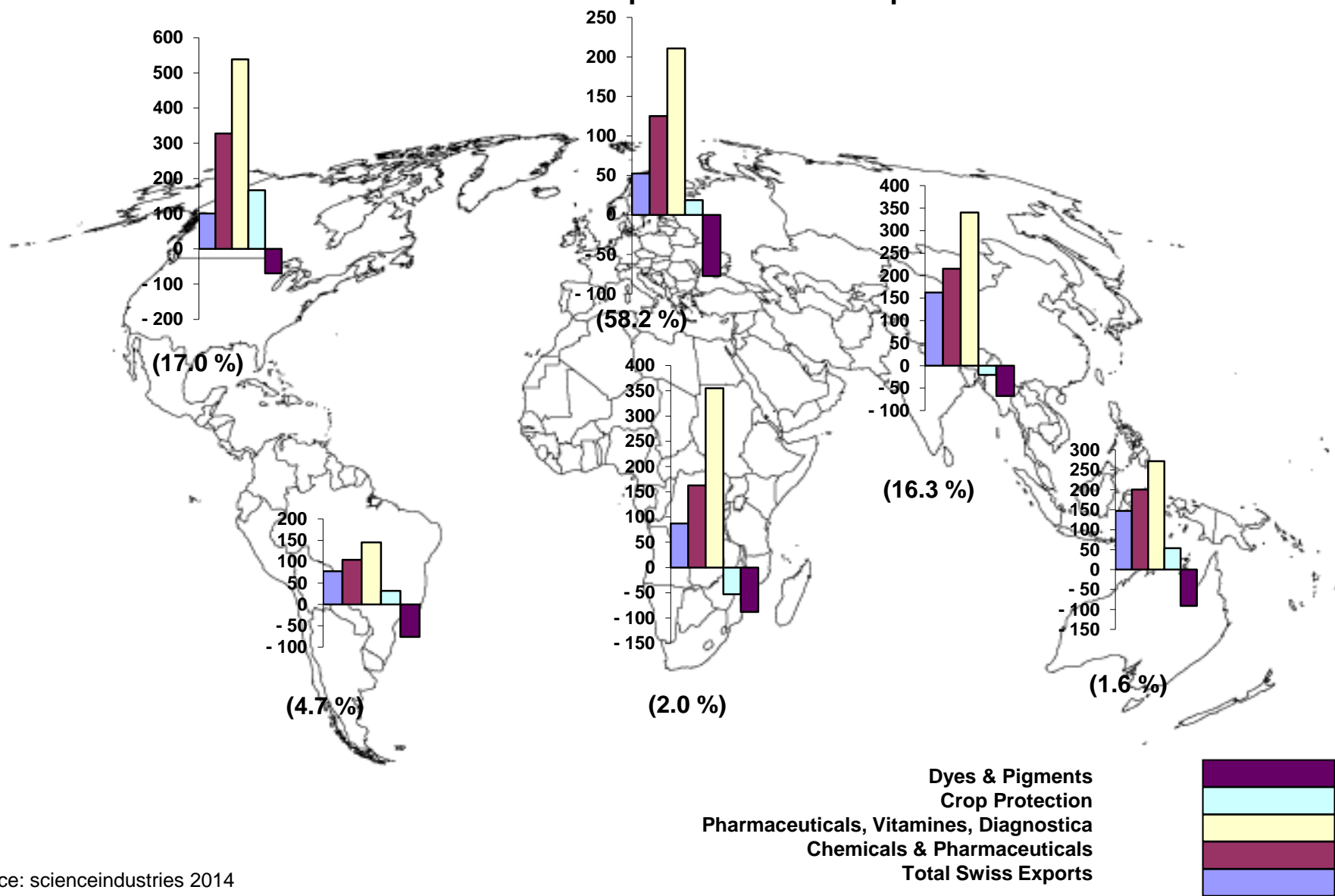
Important export industry

Total Swiss exports



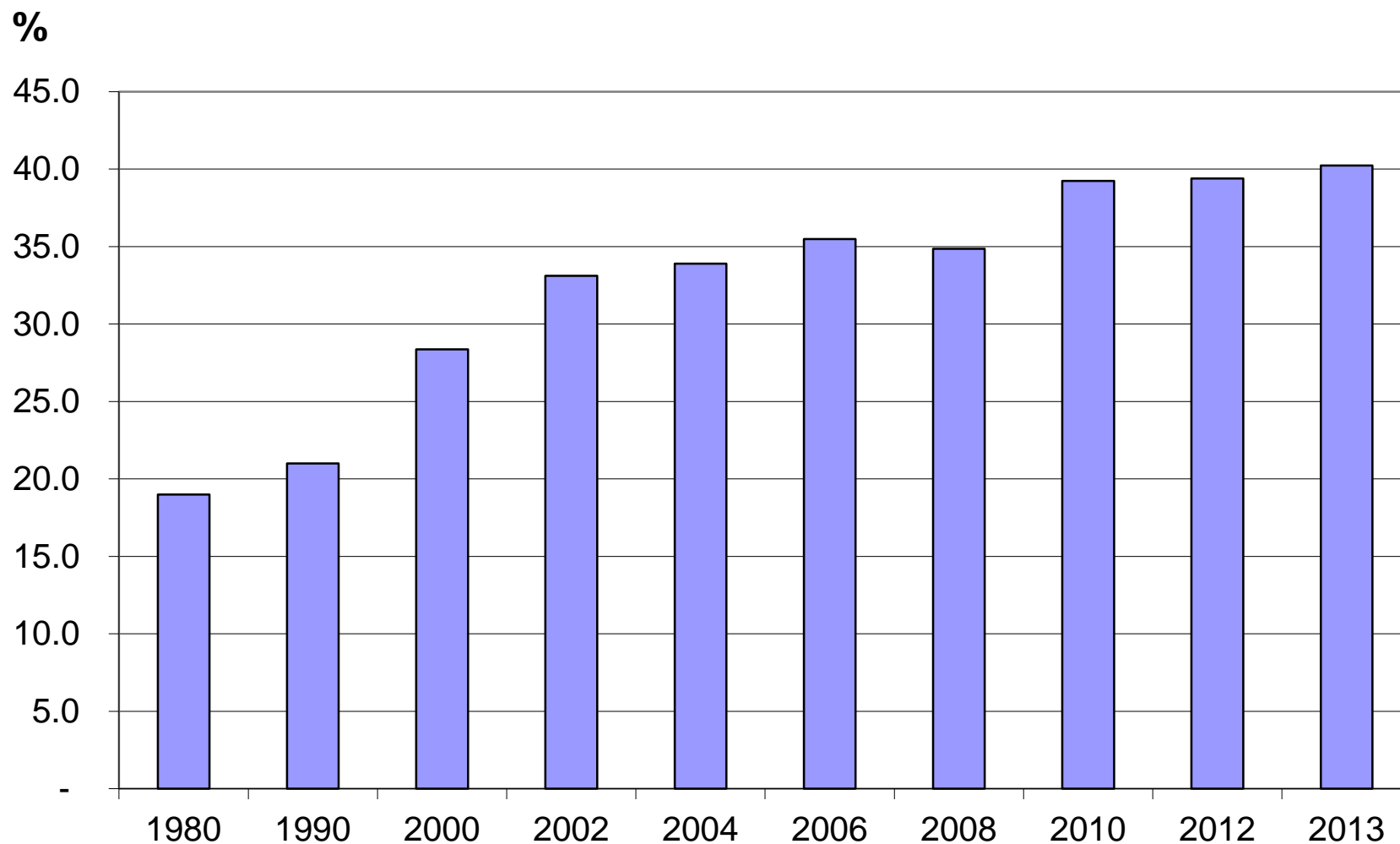
Export Growth in % 1998 - 2013

% numbers in brackets: share of chemicals & pharmaceuticals exports 2013



Growing importance of exports

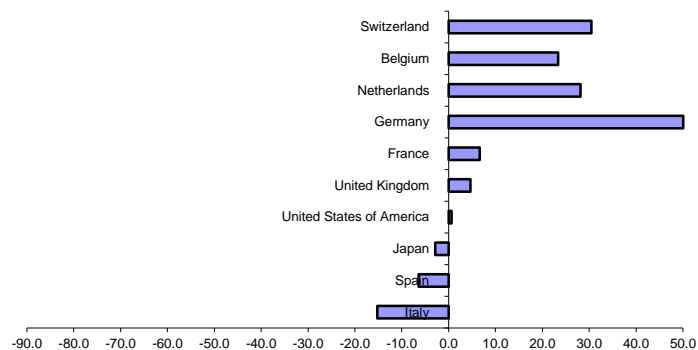
Share of chemicals and pharmaceuticals in total Swiss exports



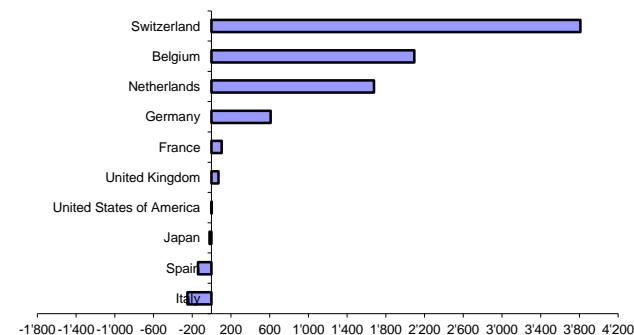
Significant trade surplus

International comparison of the export surplus 2012

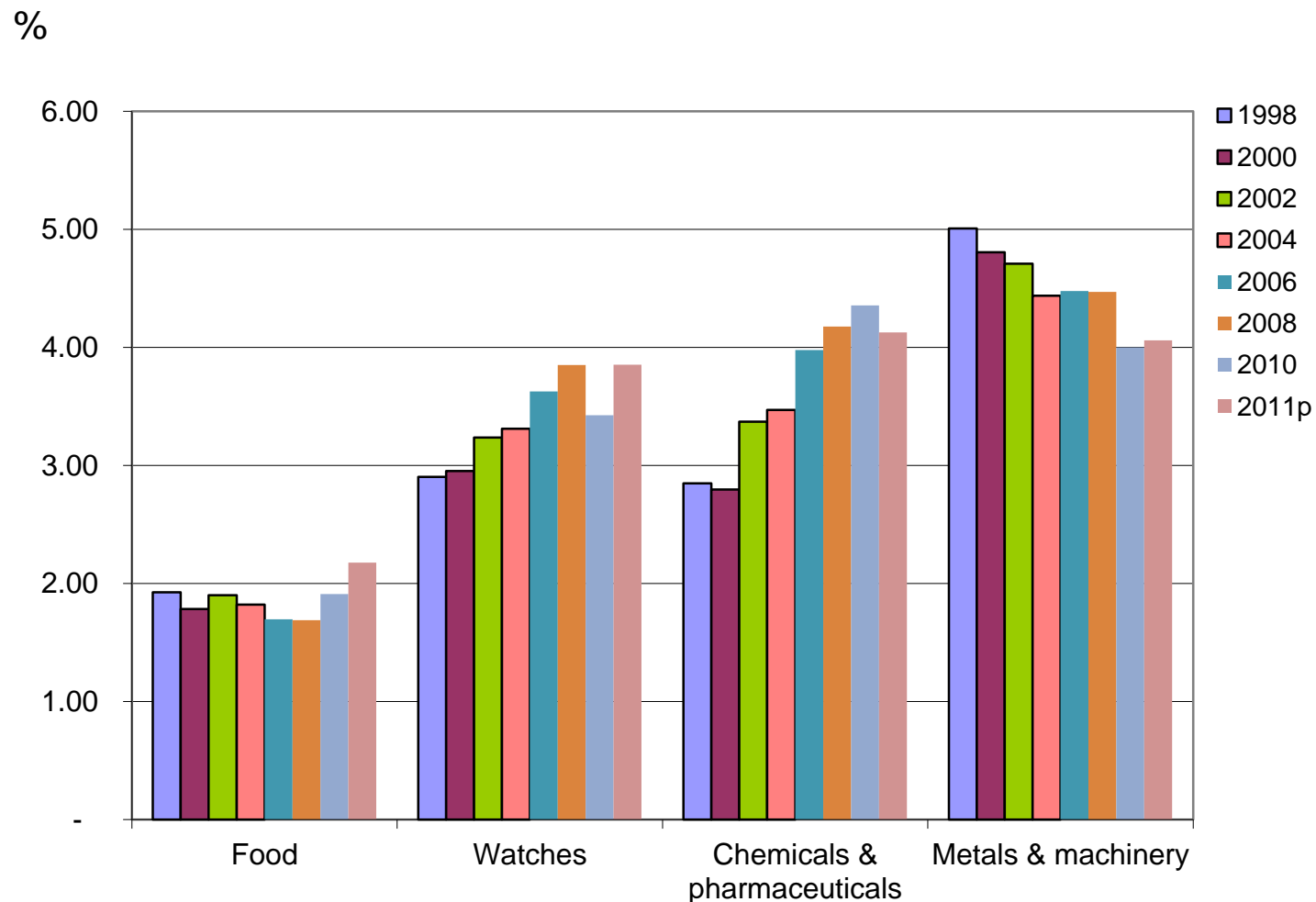
in billion EUR



per capita in EUR



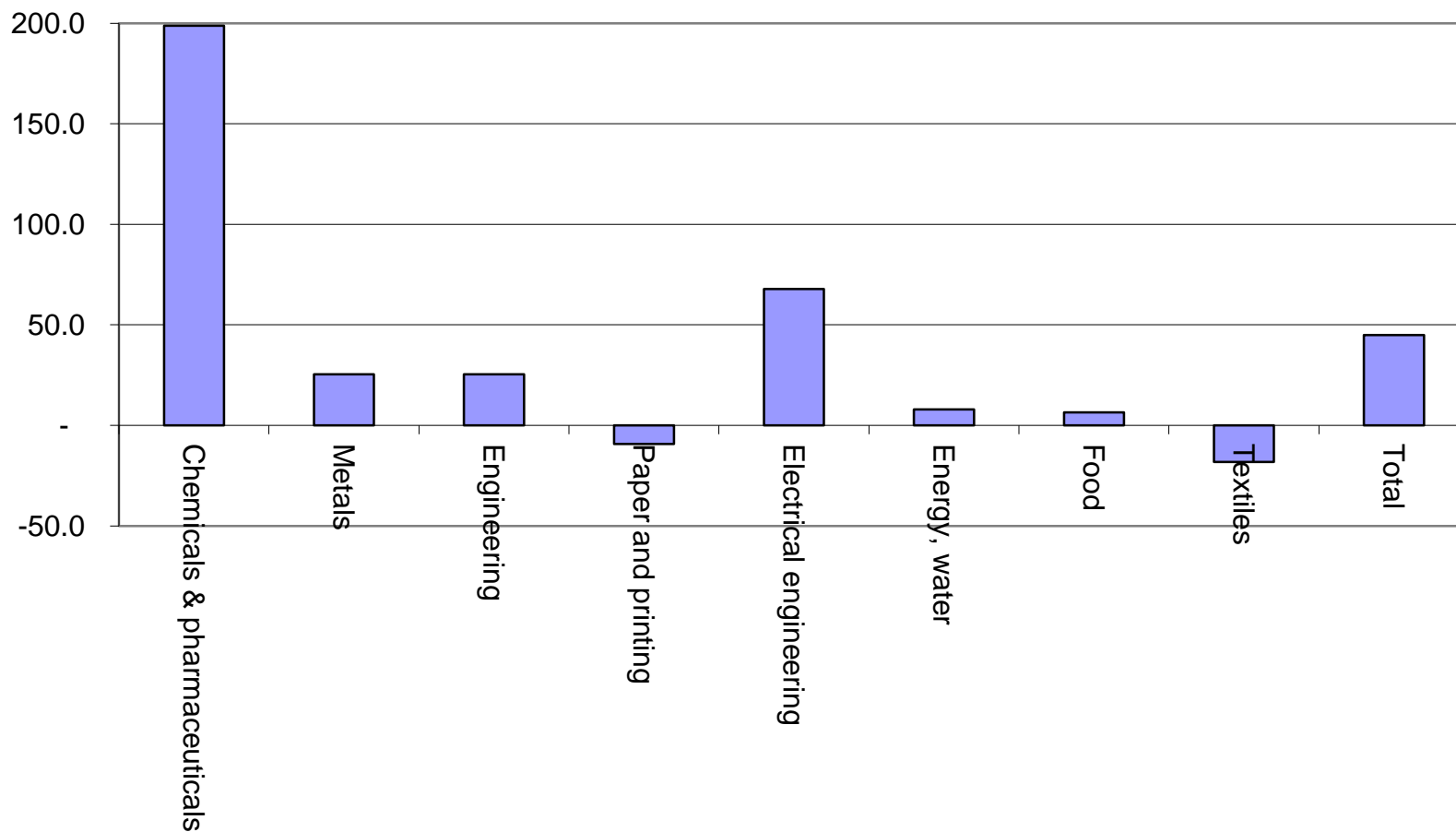
Contribution to Gross Domestic Product selected industries 1998 – 2011



Dynamic industry

Development of production index (1995 - 2011)

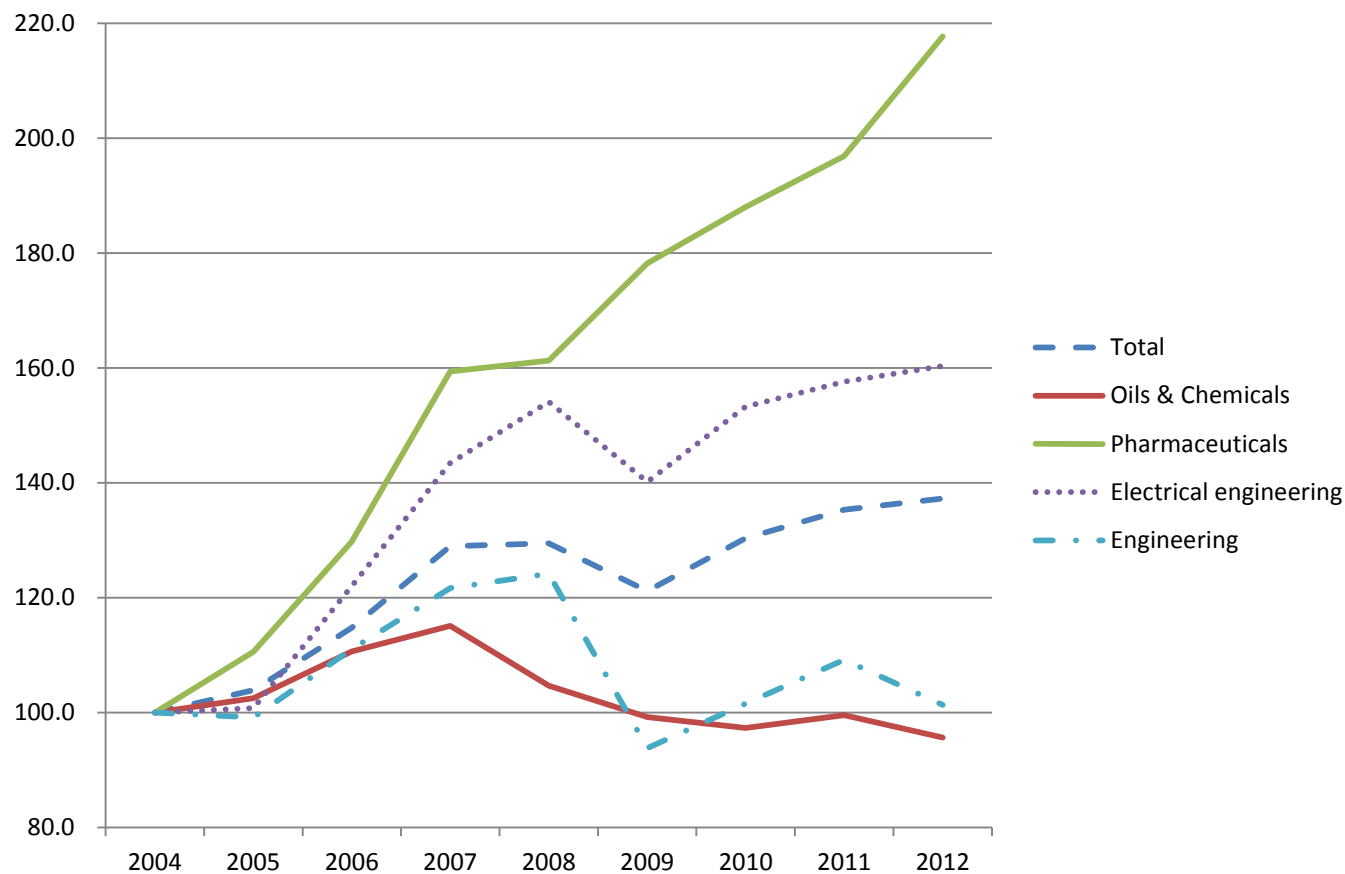
% (1995 = 100)



Dynamic Pharmaceutical Industry

Development of production index (1995 - 2012)

(% 2004 = 100)

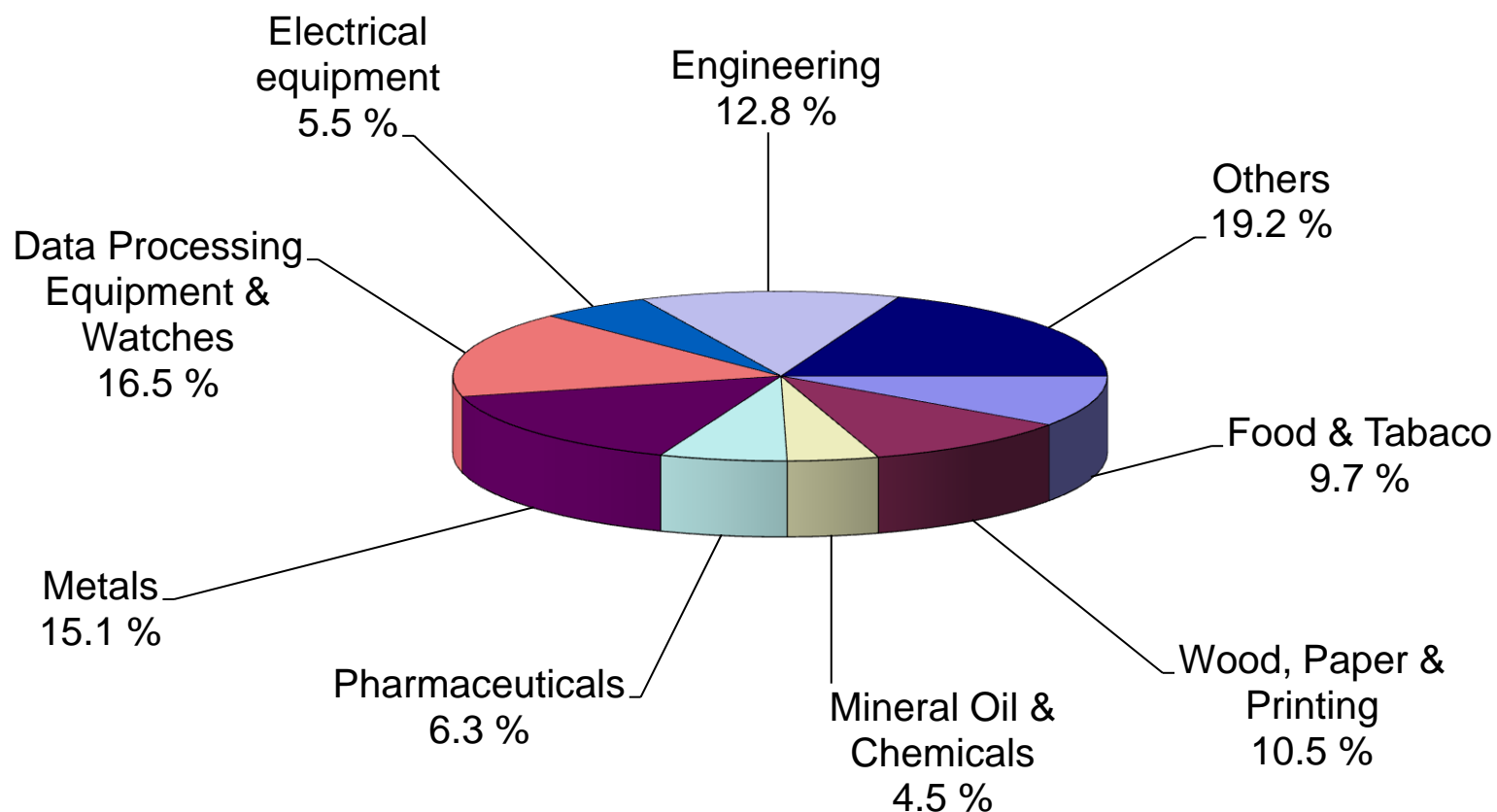


Source: SFSO 2014

Major employer in industry

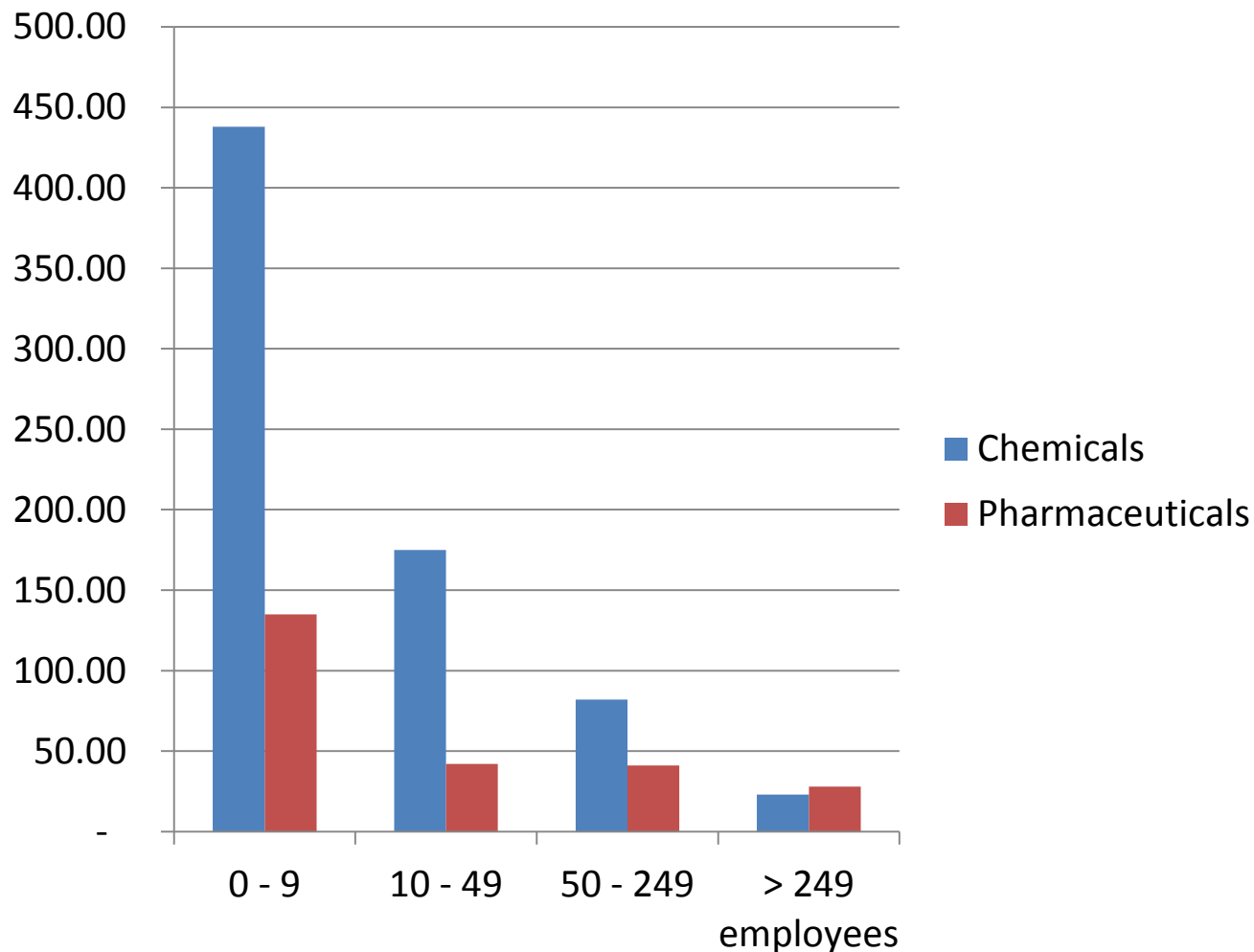
Employees by industry sector in %

Total of industry: 621'300 (2013)



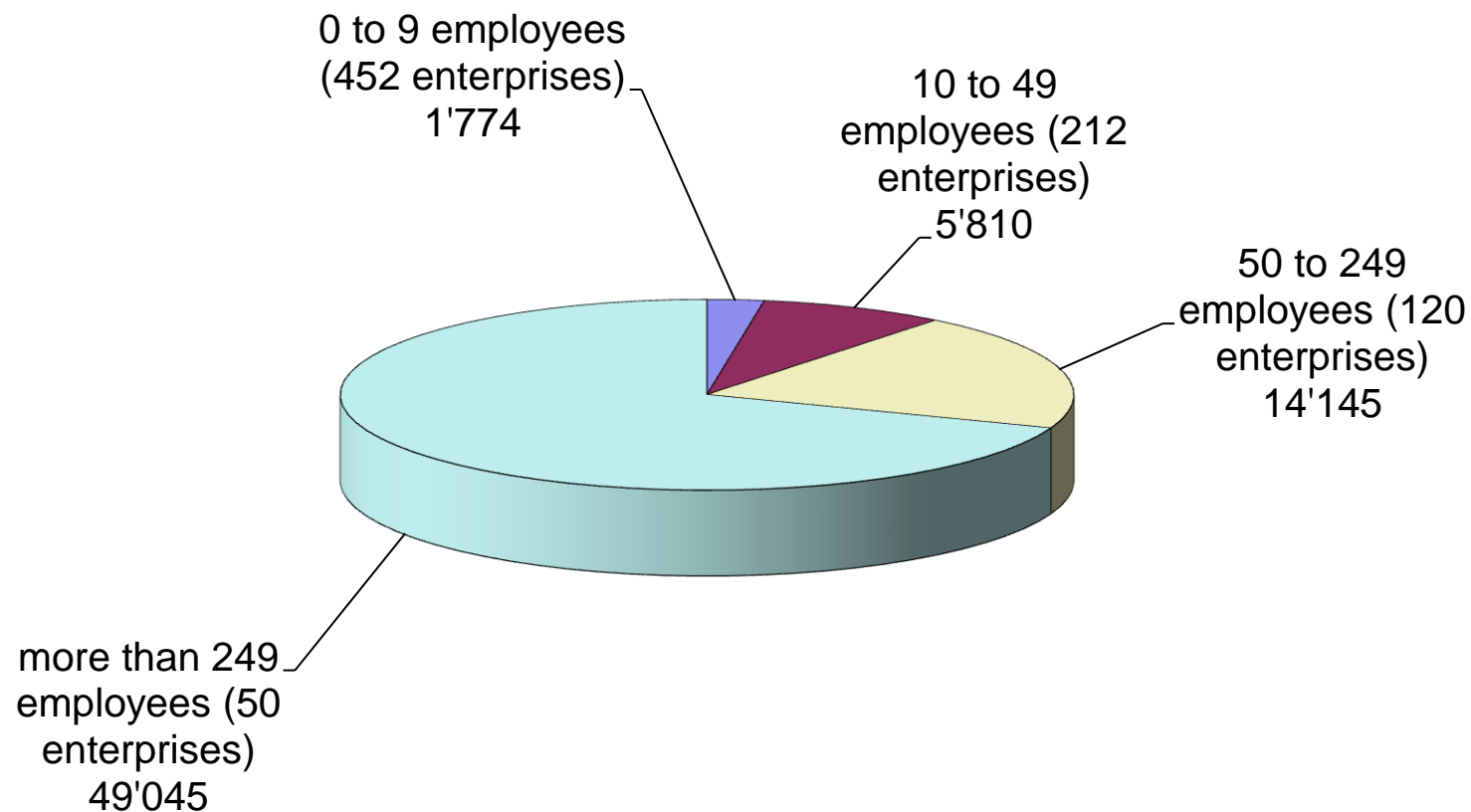
Size of the Swiss chemical and pharmaceutical companies

Distribution of employment by company size (2011)



Size of the Swiss companies

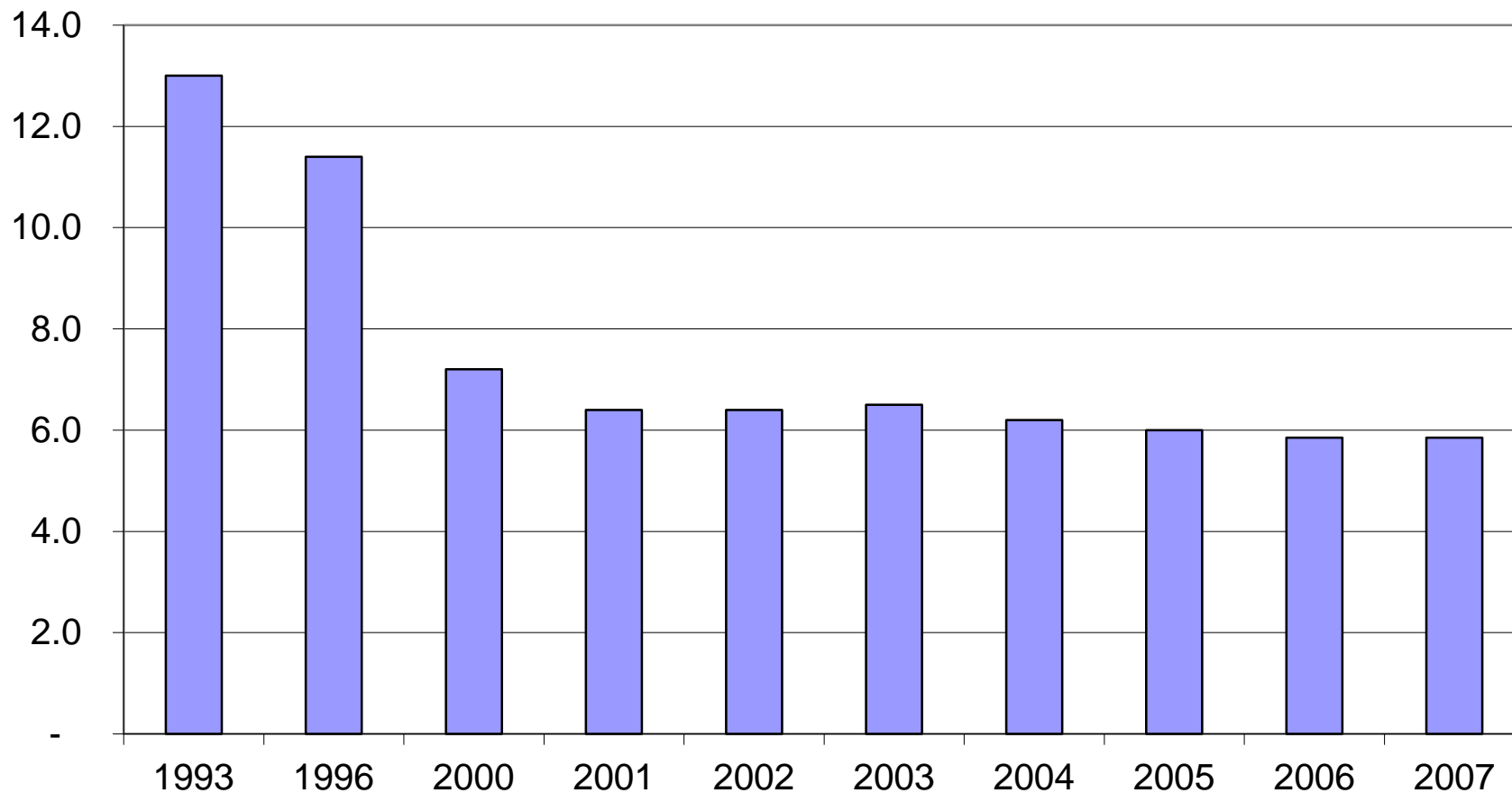
Distribution of employment by company size (2008)





Responsible Care

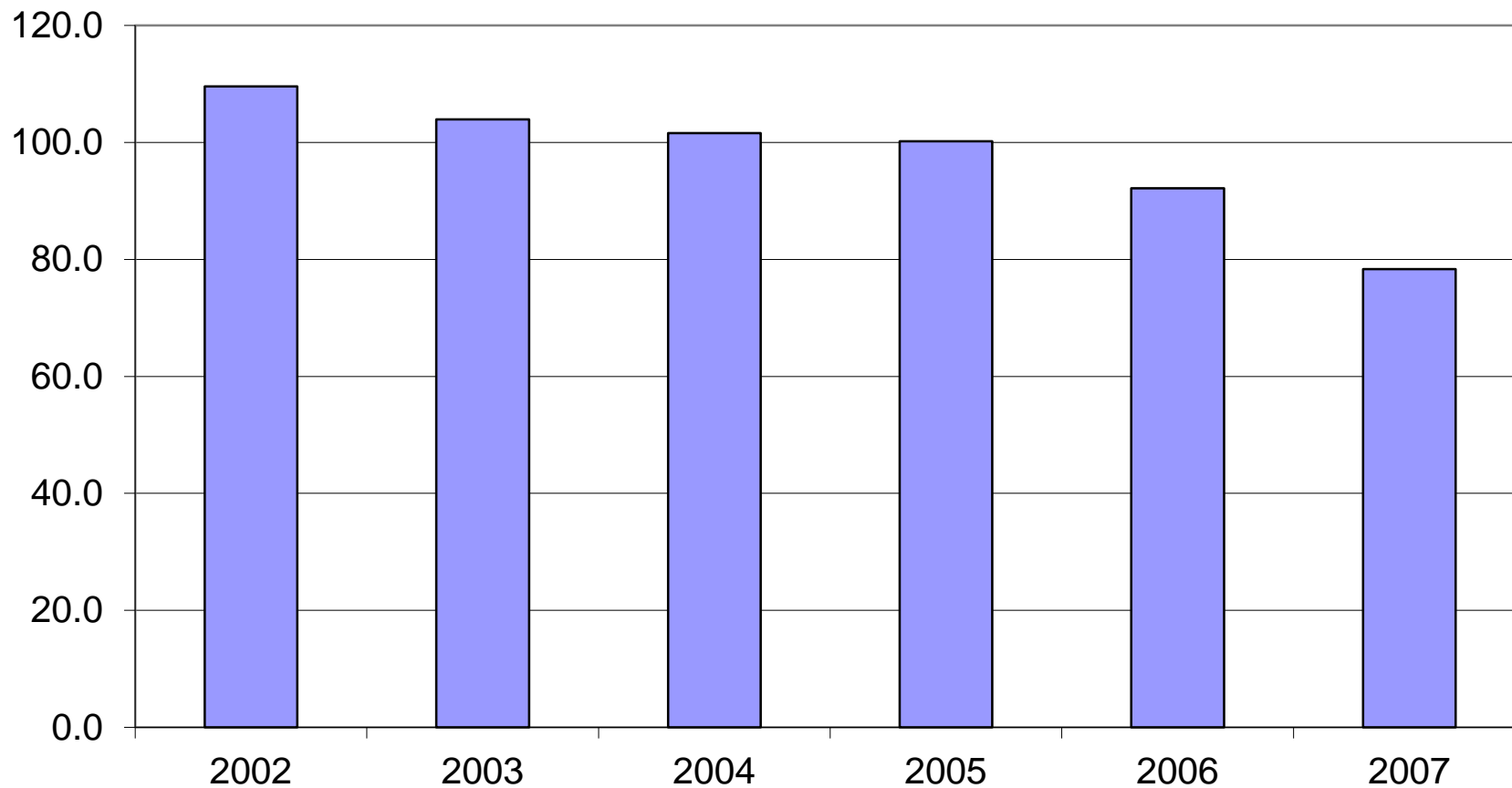
Number of workplace accidents per mio. working hours (LTIR)





Responsible Care

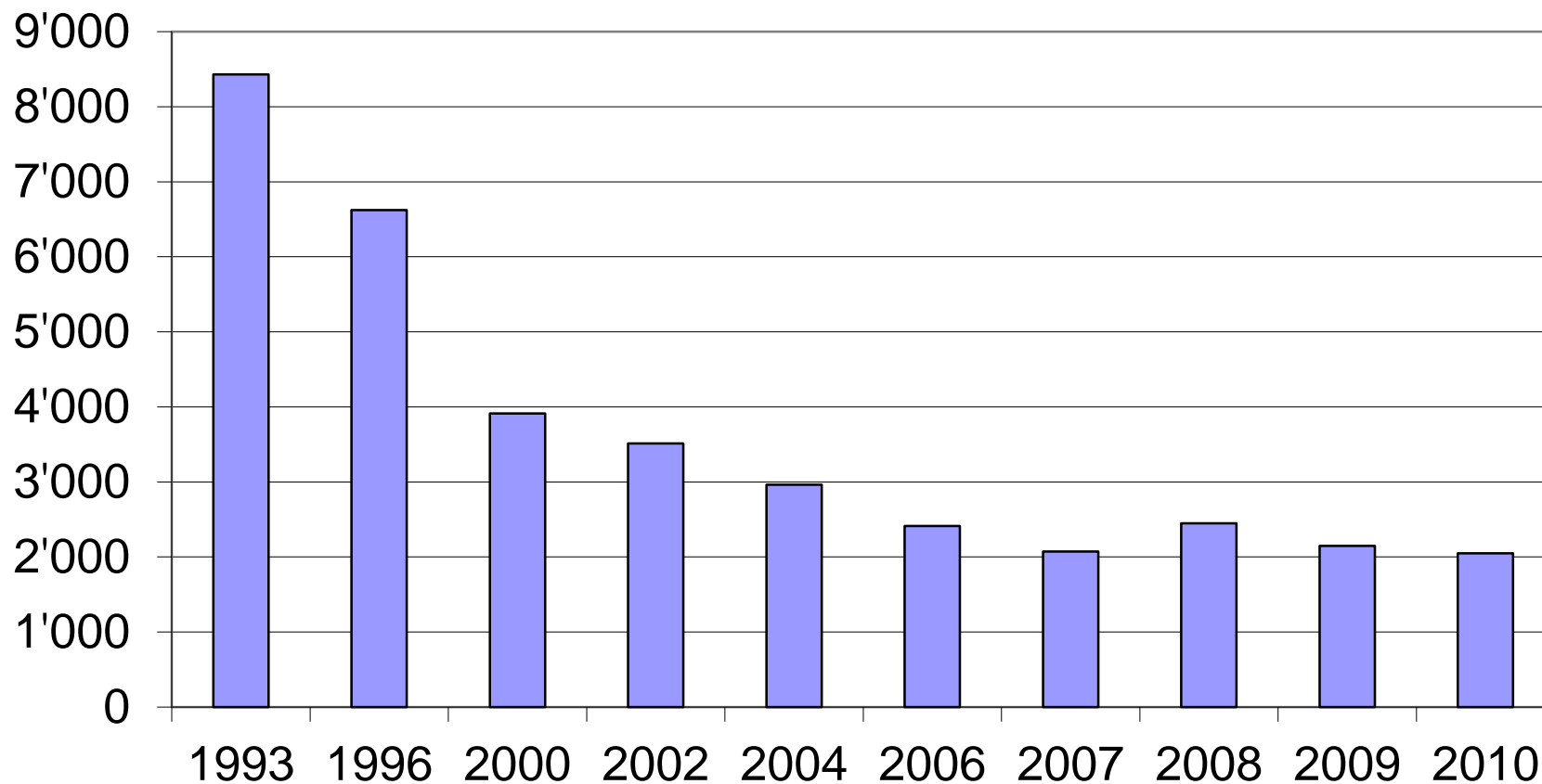
Energy consumption in terajoules per production unit





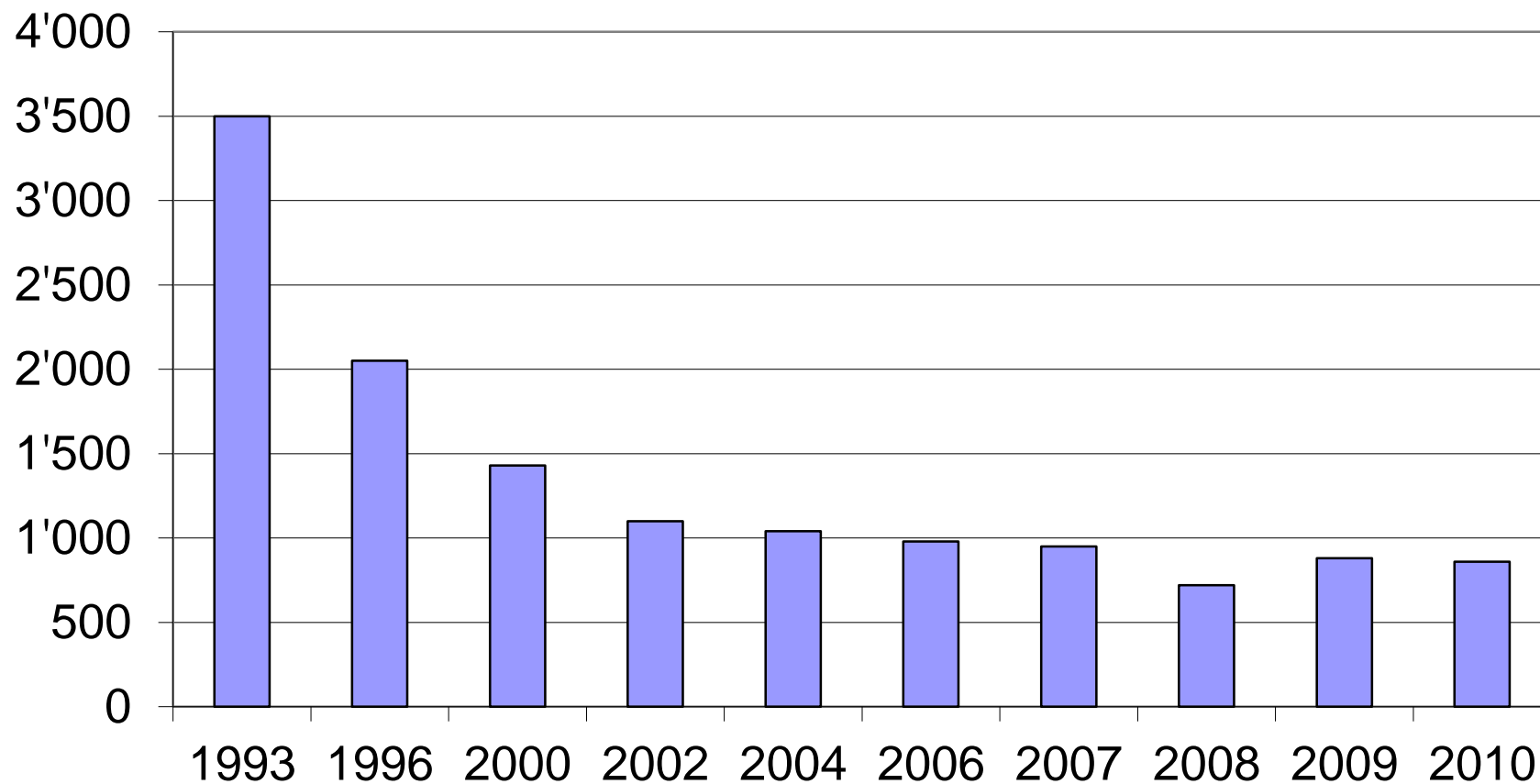
Responsible Care

CO₂ emissions in tons per production unit





Responsible Care VOC emissions





Responsible Care

Water consumption

