



# SOCMA Show

Adapting Supply Chains for a Changing World



# Navigating Policy Changes: Impacts on the Specialty Chemical Sector

Wednesday, February 19 | 3:00pm -3:30pm

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# Meet Our Speakers

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**Robert McArver**

Speaker

Vice President, Government & Regulatory Affairs

**Nouryon**



**Jennifer Abril**

Moderator

President & CEO

**SOCMA**



# SOCMA Show

Adapting Supply Chains for a Changing World

# **Navigating Policy Changes**

## **Impacts on the Specialty Chemicals Sector**

**Rob McArver**  
**Vice President, Government & Regulatory Affairs**  
February 19, 2025

**Nouryon**

# Nouryon at a Glance

## Key facts and financials



~\$5.2 billion revenue in 2023



Top-quartile performer in **people safety**



Operating in more than **80 countries**



**CDP A-** Climate score and **EcoVadis Gold Rating**<sup>1</sup>



Approximately **8,200 employees** worldwide



**32%** of revenue from **Eco-Premium Solutions**<sup>2</sup>



**13 Innovation Centers** worldwide



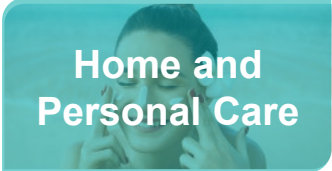



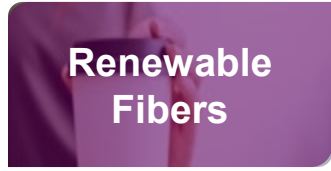

**74%** of R&D product pipeline focused on solutions with sustainability benefits



- <sup>1</sup> This A- CDP score places us in their leadership band (top quartile) and above both the European region and Chemical sector averages. This EcoVadis Gold rating places us in the top 5% of companies then rated by EcoVadis.
- <sup>2</sup> Our Eco-Premium Solutions are products that offer significant sustainability benefits over mainstream alternatives in the market while providing the same or better functionality. Based on 2023 data..

# Our Organization

Three Segments serving customers in markets with strong growth fundamentals

Nouryon	45%* Consumer & Life Sciences	35%* Performance Materials	20%* Resource Solutions
Value Proposition	<div data-bbox="366 432 695 601">  <p>Home and Personal Care</p> </div> <div data-bbox="710 432 1039 601">  <p>Life Sciences</p> </div> <ul data-bbox="392 625 1014 808" style="list-style-type: none"> <li>• Deep <b>formulation expertise</b></li> <li>• Strong <b>product innovation</b></li> <li>• <b>Essential ingredients</b> for our customers</li> </ul>	<div data-bbox="1054 432 1383 601">  <p>Polymer Specialties</p> </div> <div data-bbox="1398 432 1727 601">  <p>Paints &amp; Coatings</p> </div> <ul data-bbox="1080 625 1702 808" style="list-style-type: none"> <li>• <b>Critical products</b> for polymer and paints &amp; coatings producers</li> <li>• Improving <b>customer formulations</b></li> <li>• <b>Process innovation</b></li> </ul>	<div data-bbox="1742 432 2071 601">  <p>Renewable Fibers</p> </div> <div data-bbox="2086 432 2415 601">  <p>Industrials</p> </div> <ul data-bbox="1768 625 2390 853" style="list-style-type: none"> <li>• Customer <b>process</b> and <b>application expertise</b></li> <li>• <b>Innovative integrated model</b> that minimizes carbon footprint</li> <li>• <b>Long term</b> customer partnerships</li> </ul>
Macro Growth Drivers	<ul data-bbox="392 953 1014 1265" style="list-style-type: none"> <li>• Shift to biobased, renewable solutions</li> <li>• Crop protection innovation cycle to address regulations and land scarcity</li> <li>• Growing demand for GLP-1 &amp; insulin</li> </ul>	<ul data-bbox="1080 953 1702 1222" style="list-style-type: none"> <li>• Urbanization and infrastructure development</li> <li>• Economic growth and rising disposable income in emerging markets</li> <li>• Electrification and lightweighting</li> </ul>	<ul data-bbox="1768 953 2390 1222" style="list-style-type: none"> <li>• Increased use of renewable and biodegradable raw materials</li> <li>• Increased demand for minerals, hydrocarbons and lubes &amp; fuels</li> <li>• Solutions to meet developing regulatory and performance targets</li> </ul>

7 \* Percentages represent approximate revenue contribution per Segment in 2023.

# What Does Government Affairs Do?

- Monitor ongoing legislative and regulatory activity
    - Anticipate threats and look for opportunities
    - Work with internal partners to understand company objectives and priorities
    - Identify important issues, develop policy positions and strategies
  - Represent Nouryon before government decision-makers
    - Advocate for preferred outcomes on policy, interpretation and enforcement
    - Enhance government authorities understanding of Nouryon
    - Seek their support for our preferred outcomes
- Government Affairs is a key Nouryon support function**



# What to Expect on Policy

- Tariffs

- The future is unwritten - how to prepare?
- Supply chains are strained; logistics planning is disrupted

Companies need certainty to inform strategy, planning, forecasting

- Environment

- Major deregulatory efforts planned
- 18-month window to secure permanent changes to TSCA, IRIS
- Innovation and new chemistries depend on a working TSCA program

A functioning TSCA program is essential to get new chemicals into commerce

# Other Policy Considerations

- Climate

- The US has withdrawn from the Paris Climate Accord
- IRA and other Biden climate policies endangered, but many Rs support

Trump dismisses climate concerns, but industry remains responsive to customer demands

- Energy

- “Drill, baby, drill” – emphasis on fossil fuels; green energy out of favor
- Key objectives: lower energy prices, streamlined permitting
- Removal of restrictions on LNG exports is driving prices upwards

Low energy, feedstock prices are US chem sector's primary competitive advantage

# What's Next

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**Grand Opening Reception**  
4:30pm – 5:30pm

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