



# The Good, The Bad, and the Uncertain:

*Public Perception of the Chemical Enterprise*

Mark Jones

*Executive External Strategy and Communications Fellow*  
The Dow Chemical Company

**22 August 2017**













■ Remaining



 Gone



MORE THAN  
**96%**  
OF ALL  
MANUFACTURED  
GOODS ARE  
DIRECTLY TOUCHED BY  
THE BUSINESS  
OF CHEMISTRY



THE BUSINESS  
OF CHEMISTRY IS AN  
**\$800**  
BILLION ENTERPRISE

CHEMICAL COMPANIES INVESTED  
**\$93 BILLION**  
IN RESEARCH AND  
DEVELOPMENT IN 2015



American  
Chemistry  
Council  
JUNE 2016







THE BUSINESS  
OF CHEMISTRY  
SUPPORTS NEARLY

**26%**

OF THE U.S. GDP

## THE BUSINESS OF CHEMISTRY ACCOUNTS FOR 14% OF U.S. EXPORTS

\$184 BILLION IN 2015, AND IS THE  
LARGEST EXPORTER IN THE U.S



A LEADER IN  
PRODUCTION, THE  
U.S. CHEMICAL INDUSTRY  
PROVIDES OVER

**15%**

OF THE WORLD'S  
CHEMICALS



JUNE 2016





FOR EVERY JOB CREATED BY THE  
BUSINESS OF CHEMISTRY, 6.3 ARE  
GENERATED ELSEWHERE IN THE  
ECONOMY, TOTALING NEARLY  
**6 MILLION JOBS**

THE BUSINESS OF  
CHEMISTRY PROVIDES  
**810,000**  
SKILLED, GOOD-PAYING  
AMERICAN JOBS



THE AVERAGE ANNUAL  
PAY IN THE BUSINESS  
OF CHEMISTRY IS

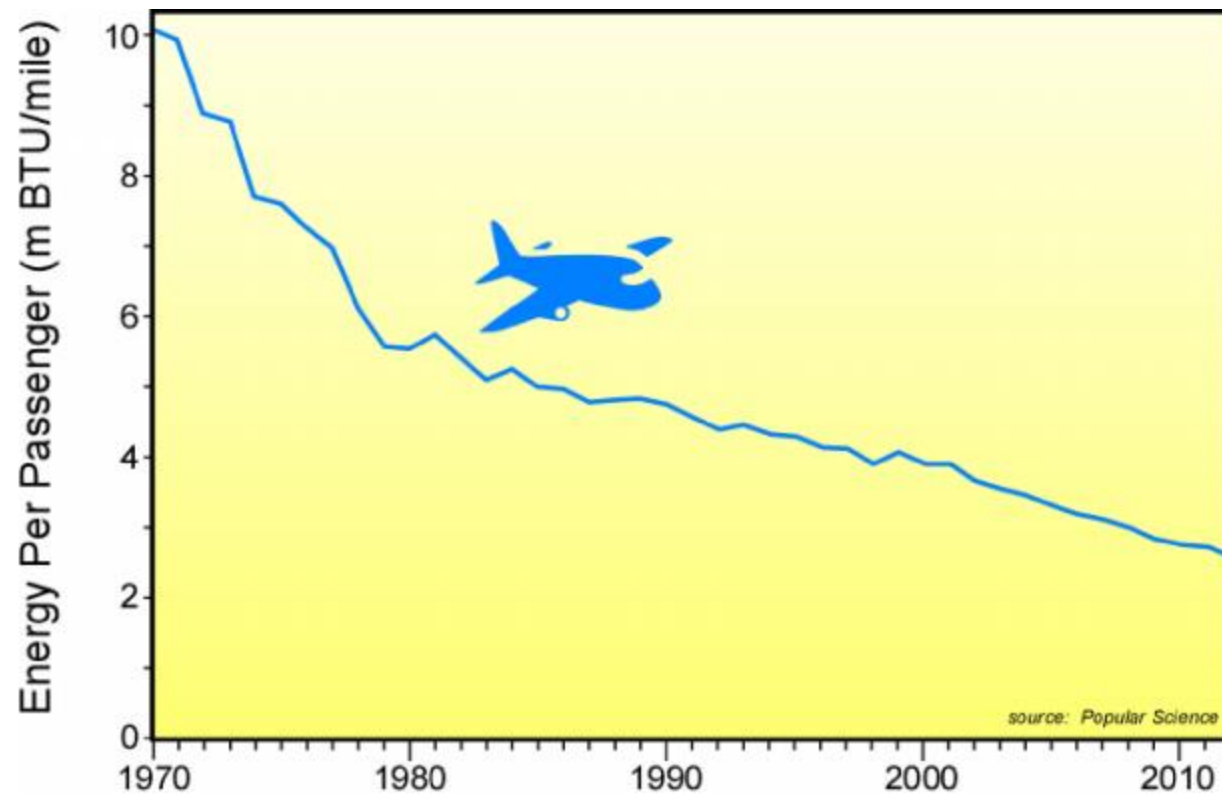
**\$94,000**

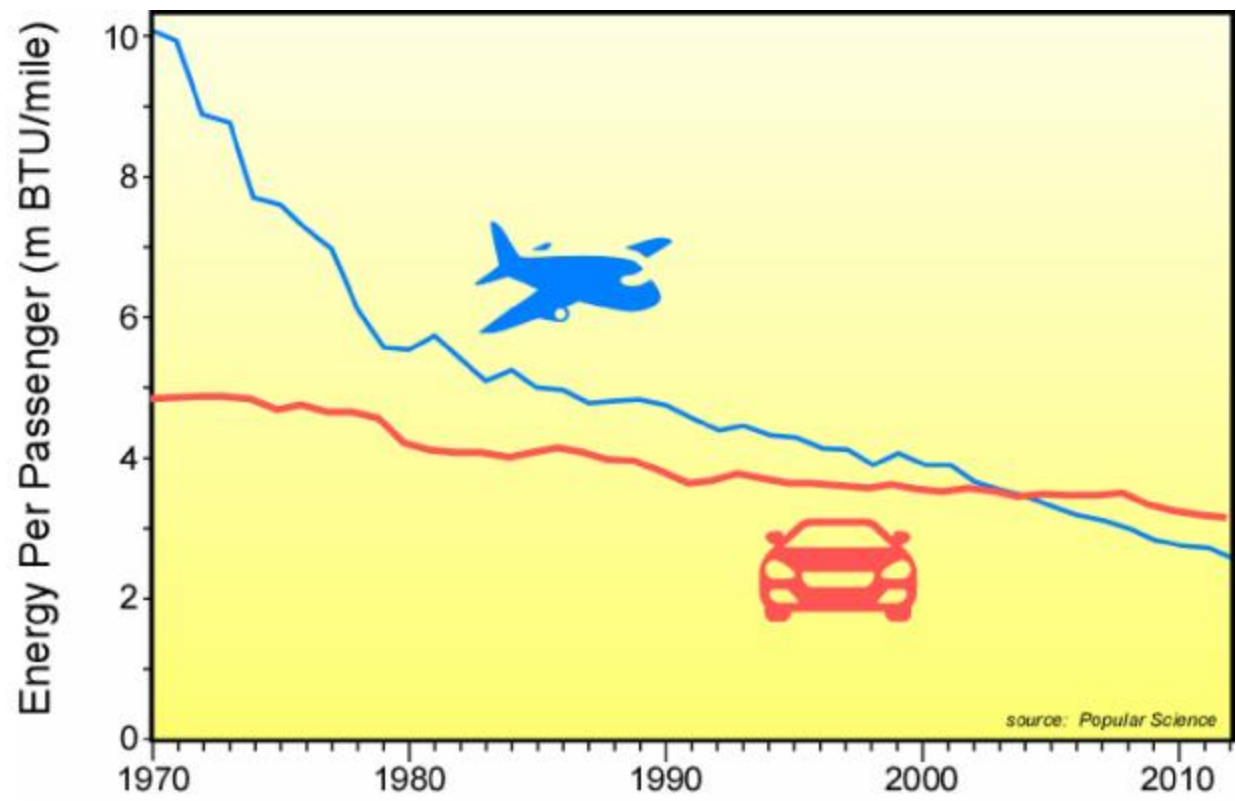
THAT'S 47% HIGHER  
THAN THE AVERAGE  
MANUFACTURING PAY

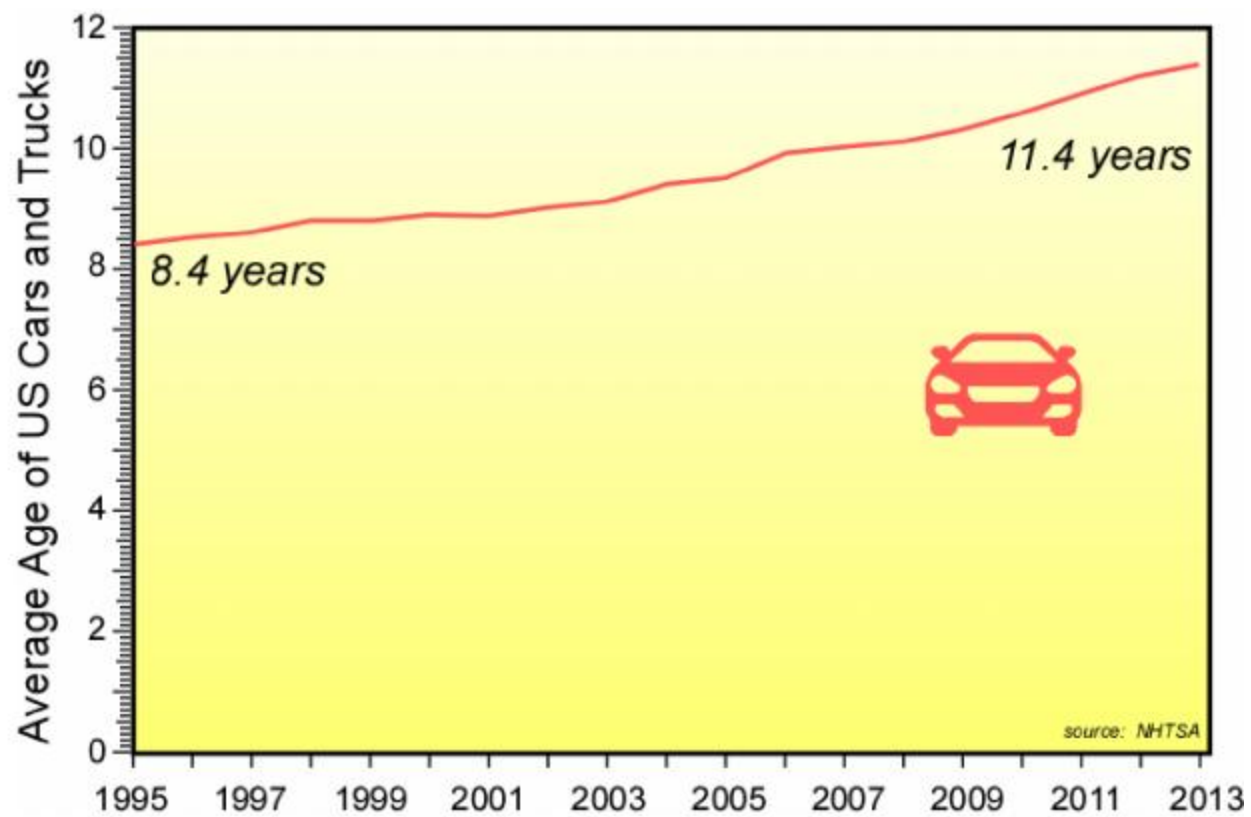


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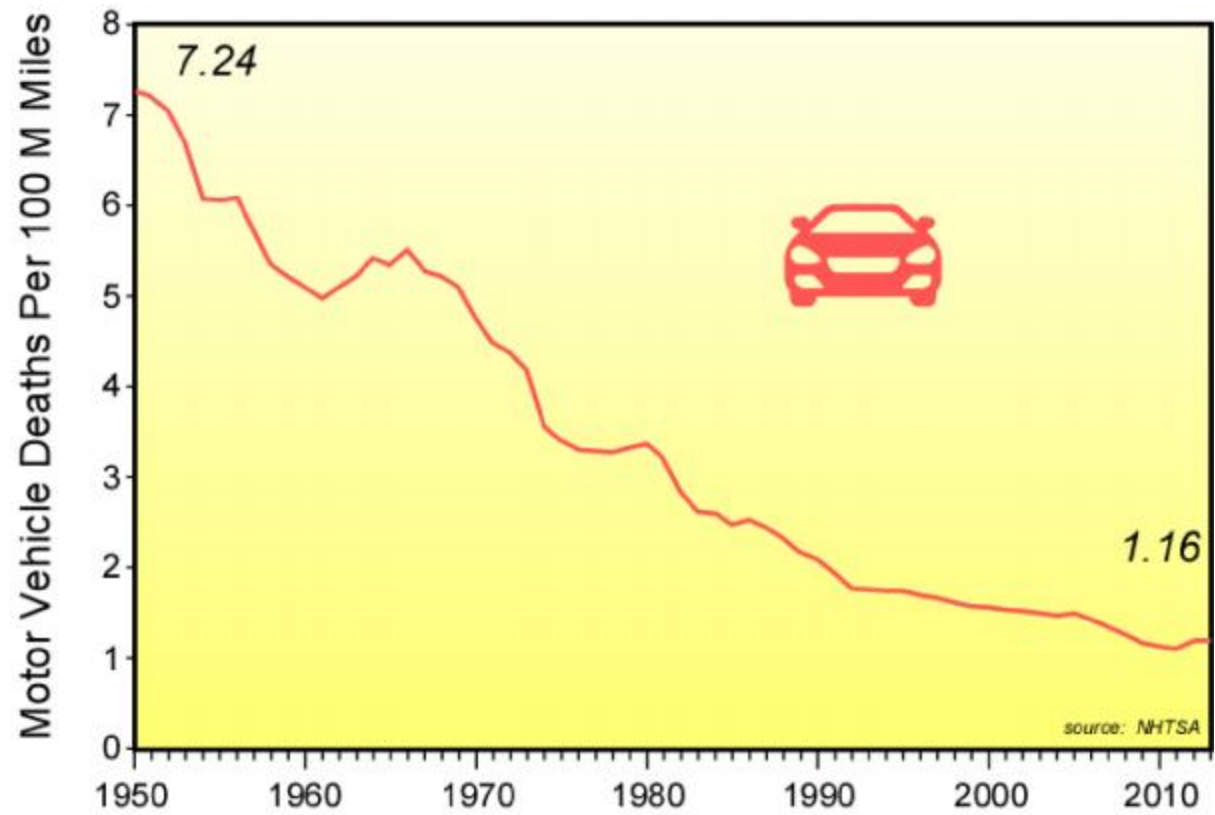


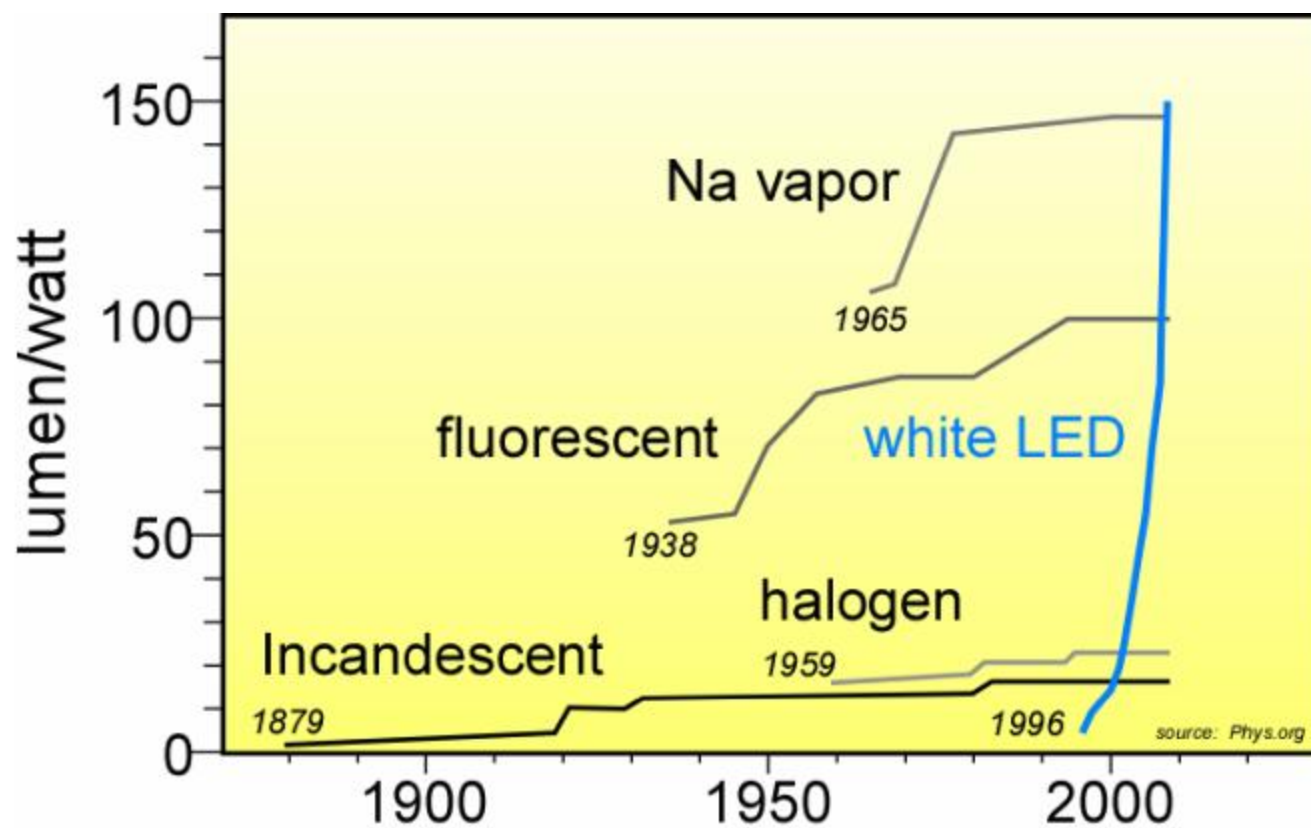


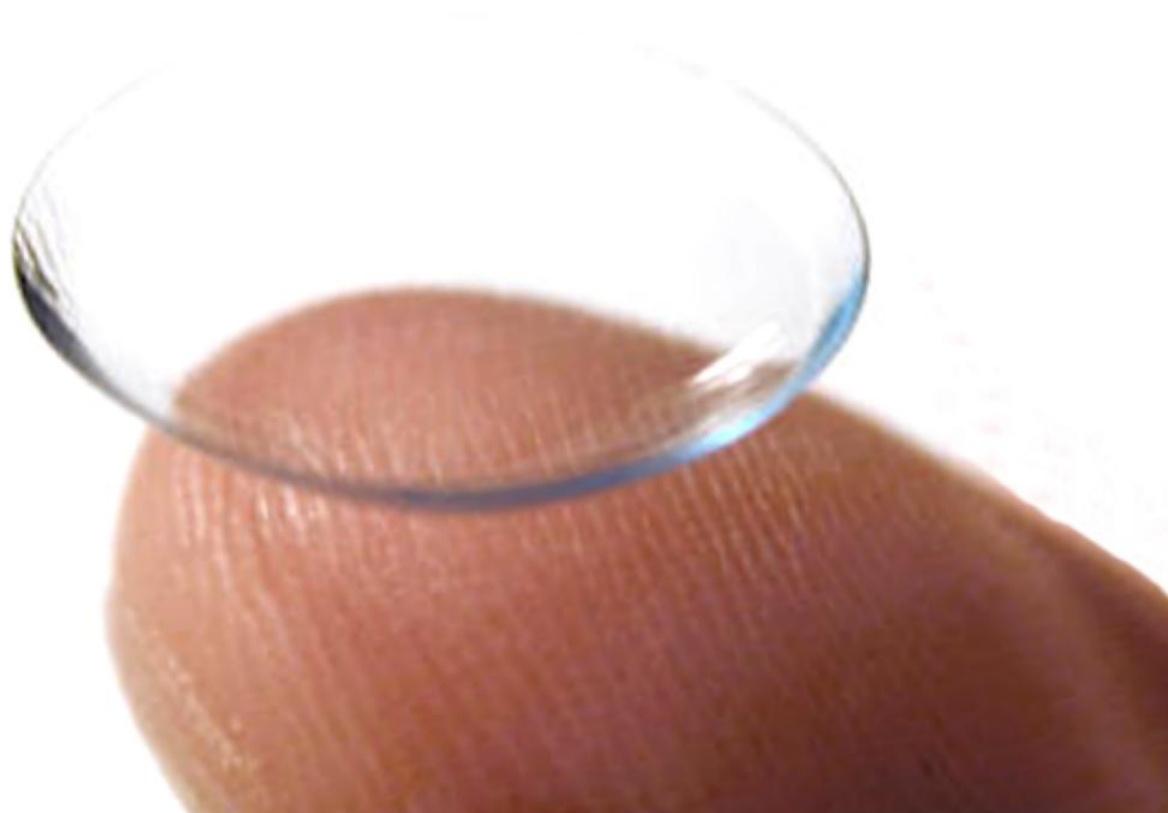






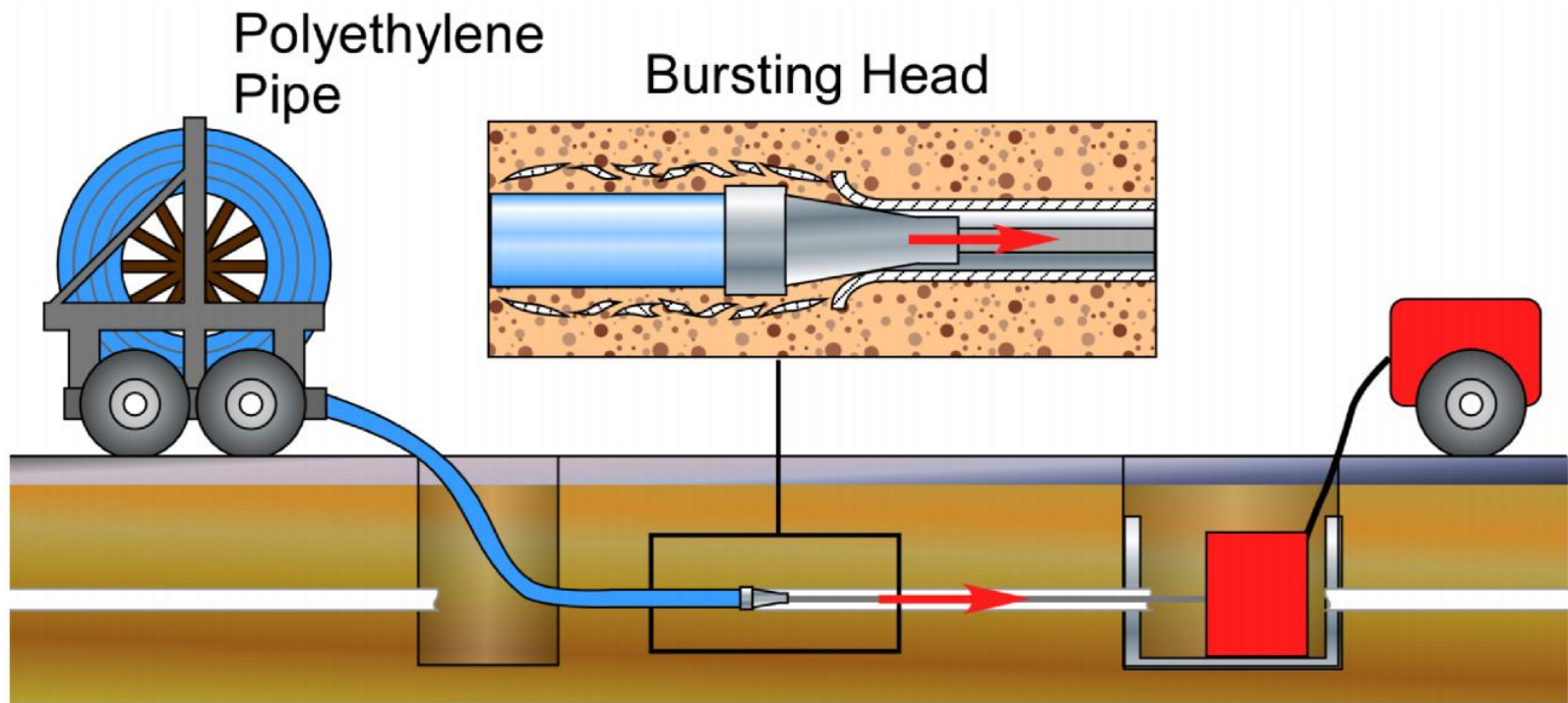




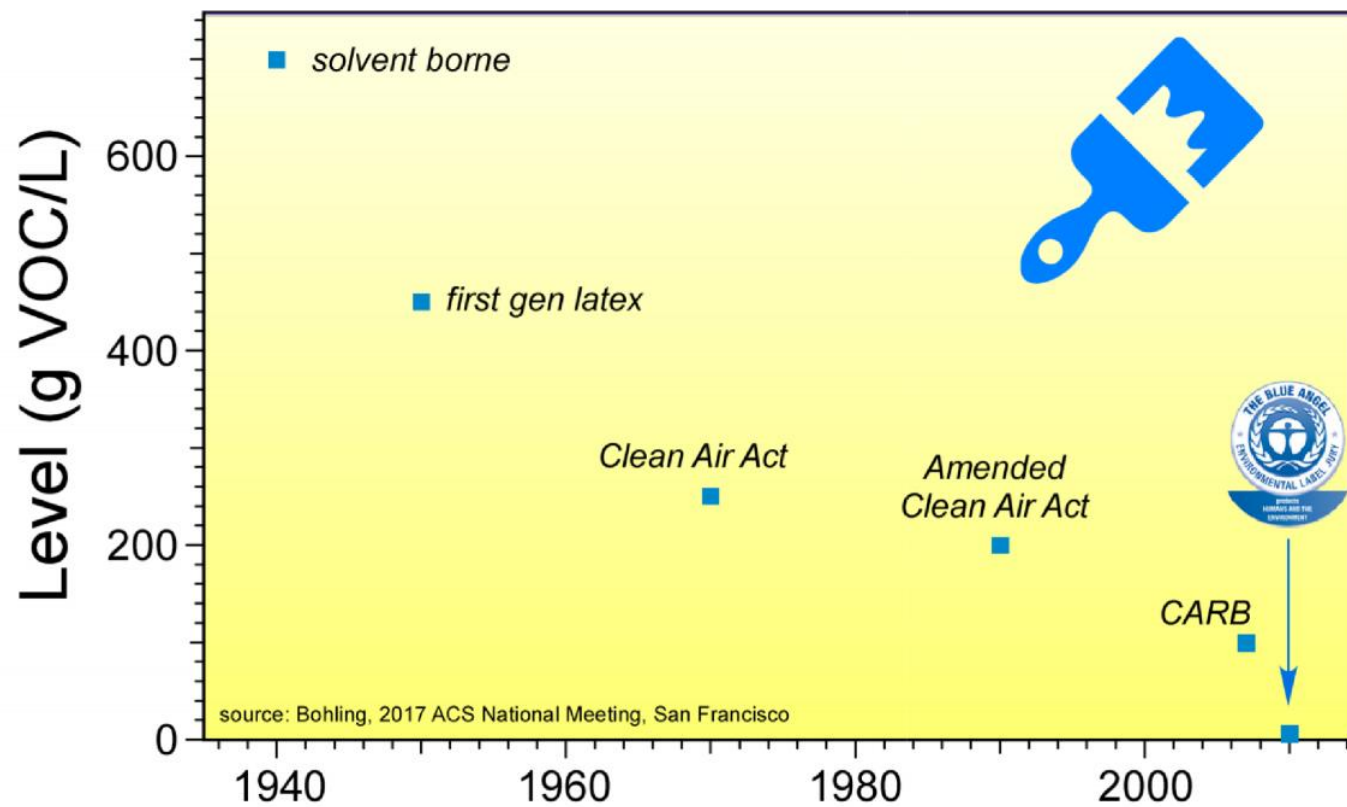


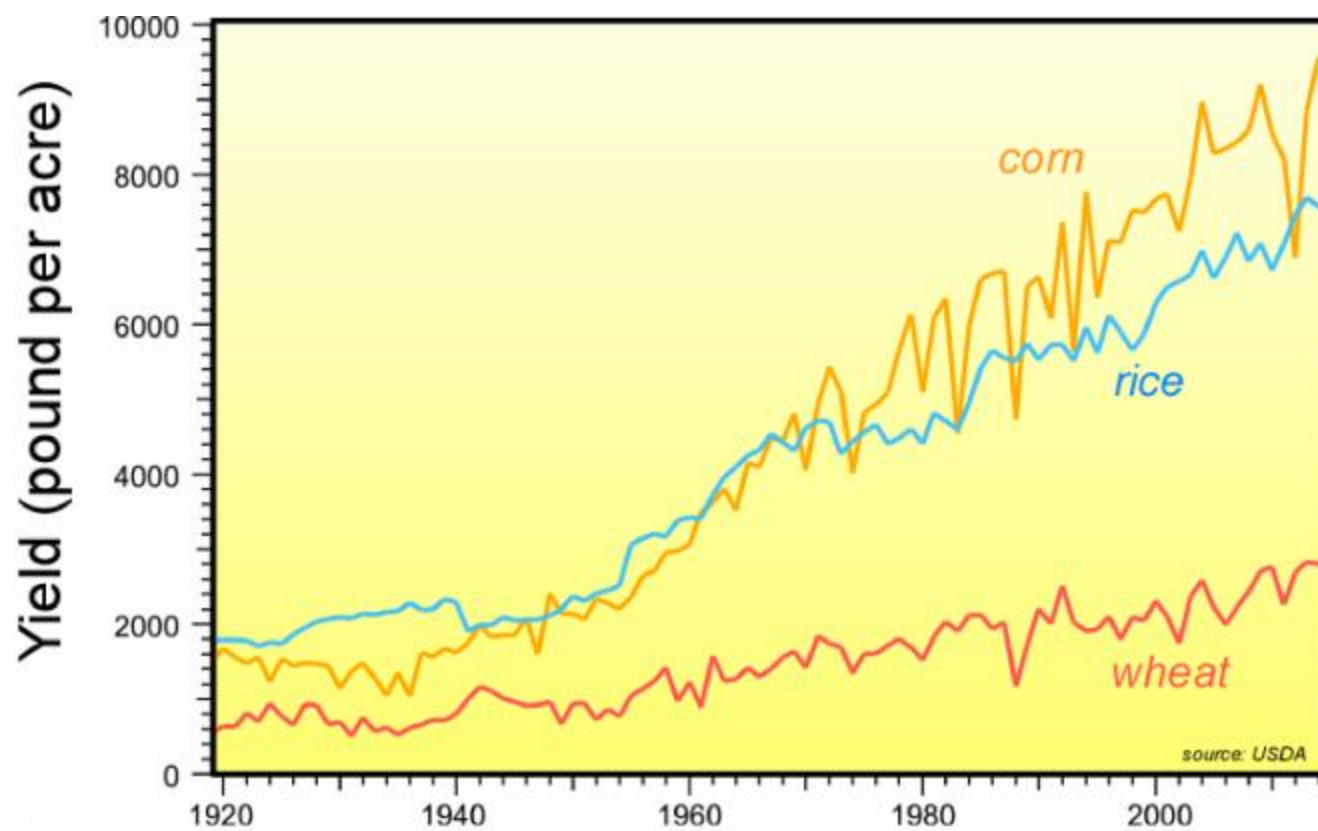


## ■ Pipe Bursting







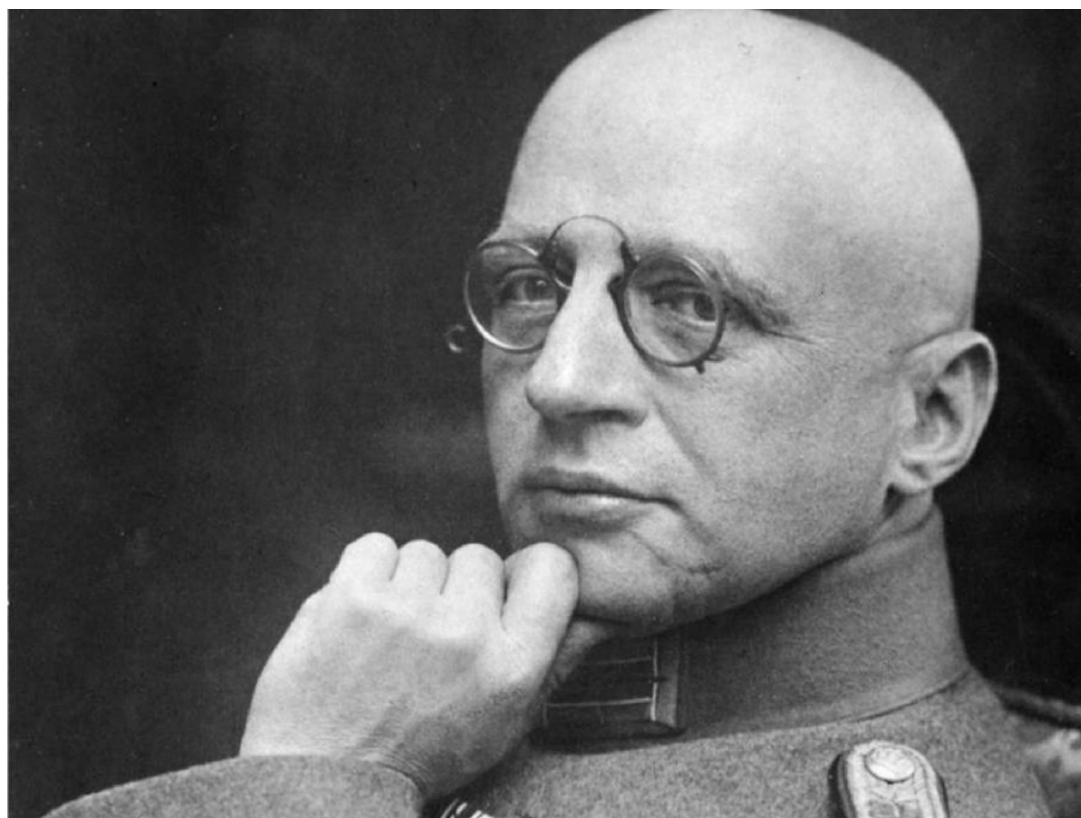


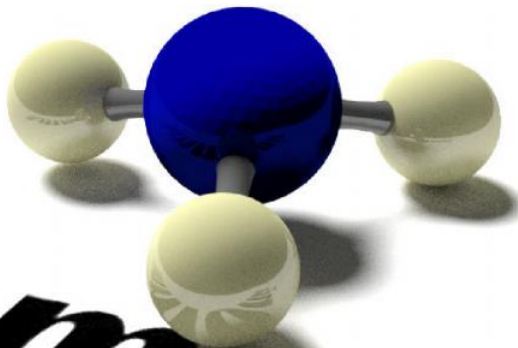


If you ate today...  
**THANK A  
FARMER**

If you're a farmer ...  
**THANK A  
CHEMIST**





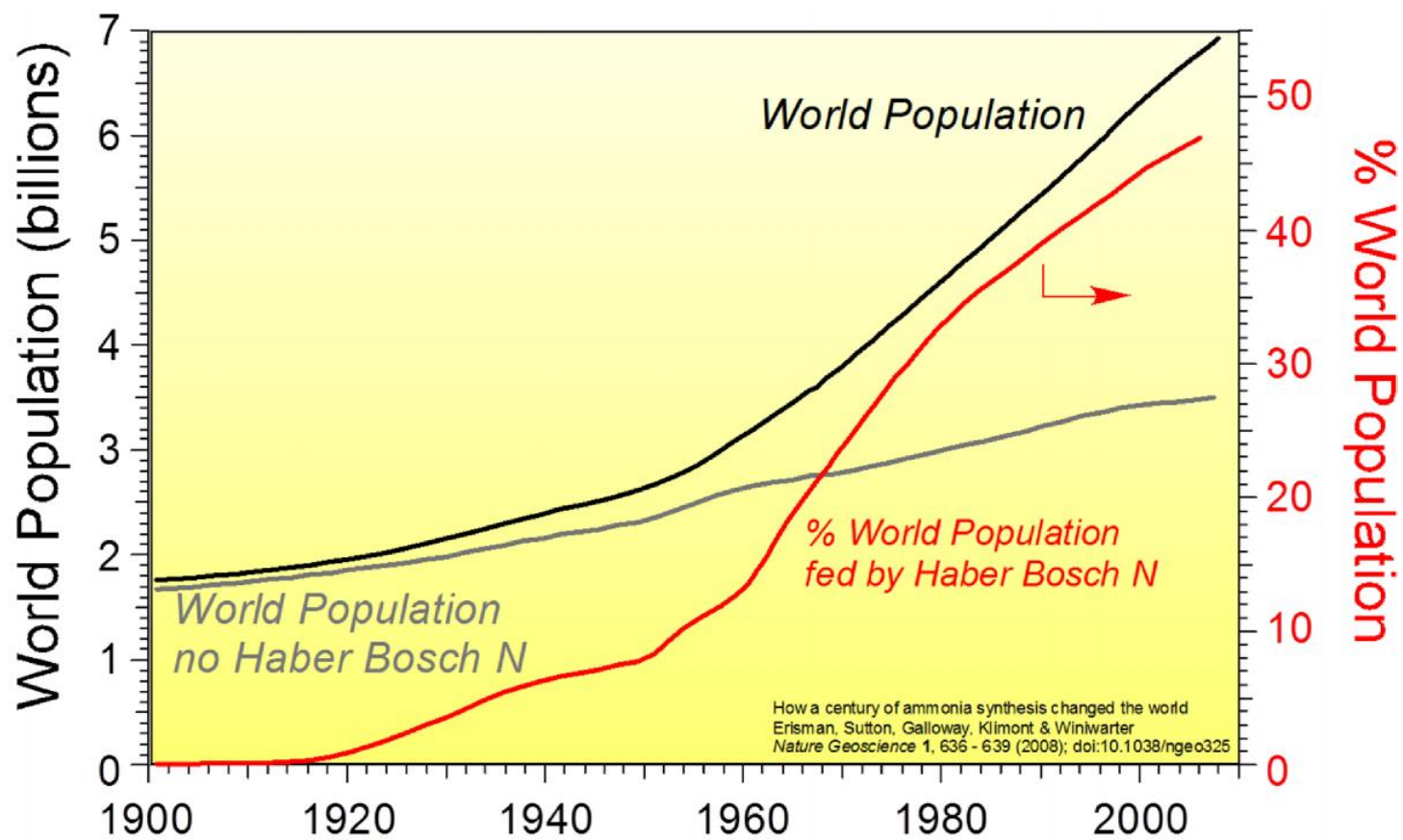


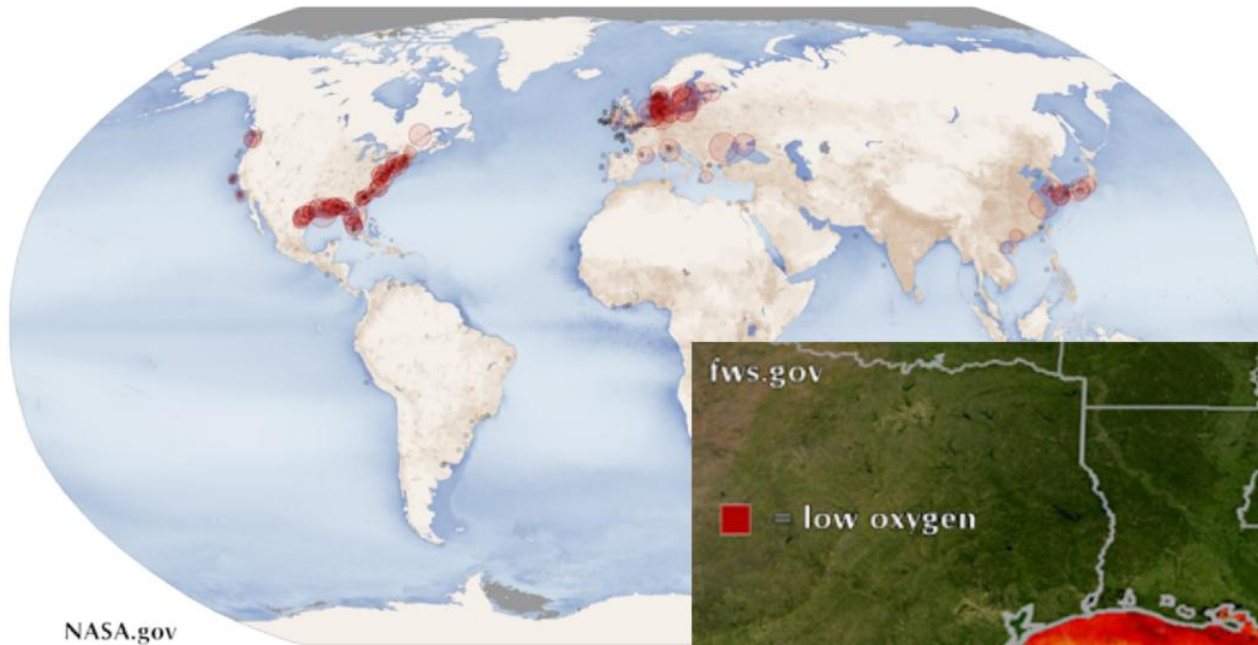
***Ammonia***



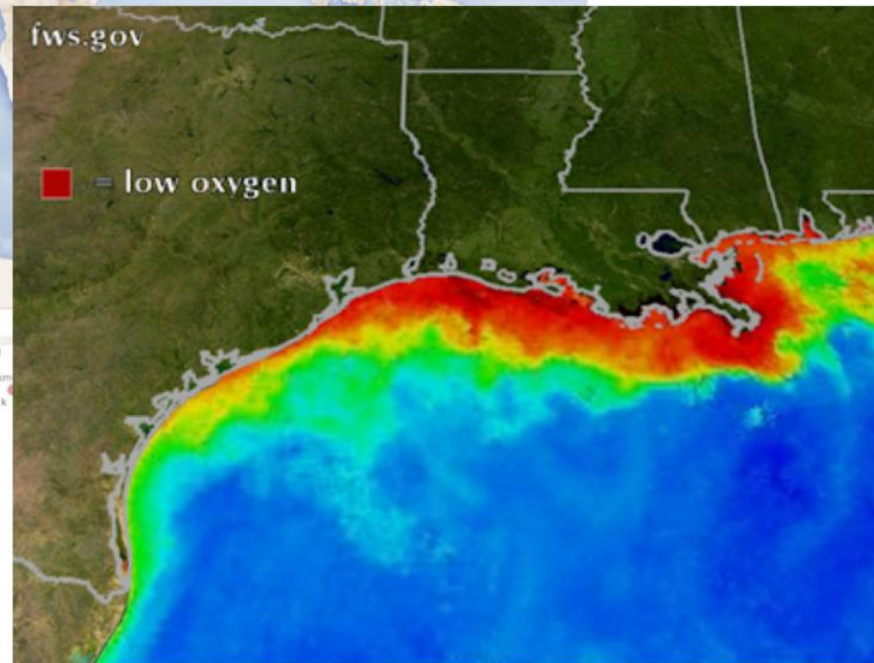


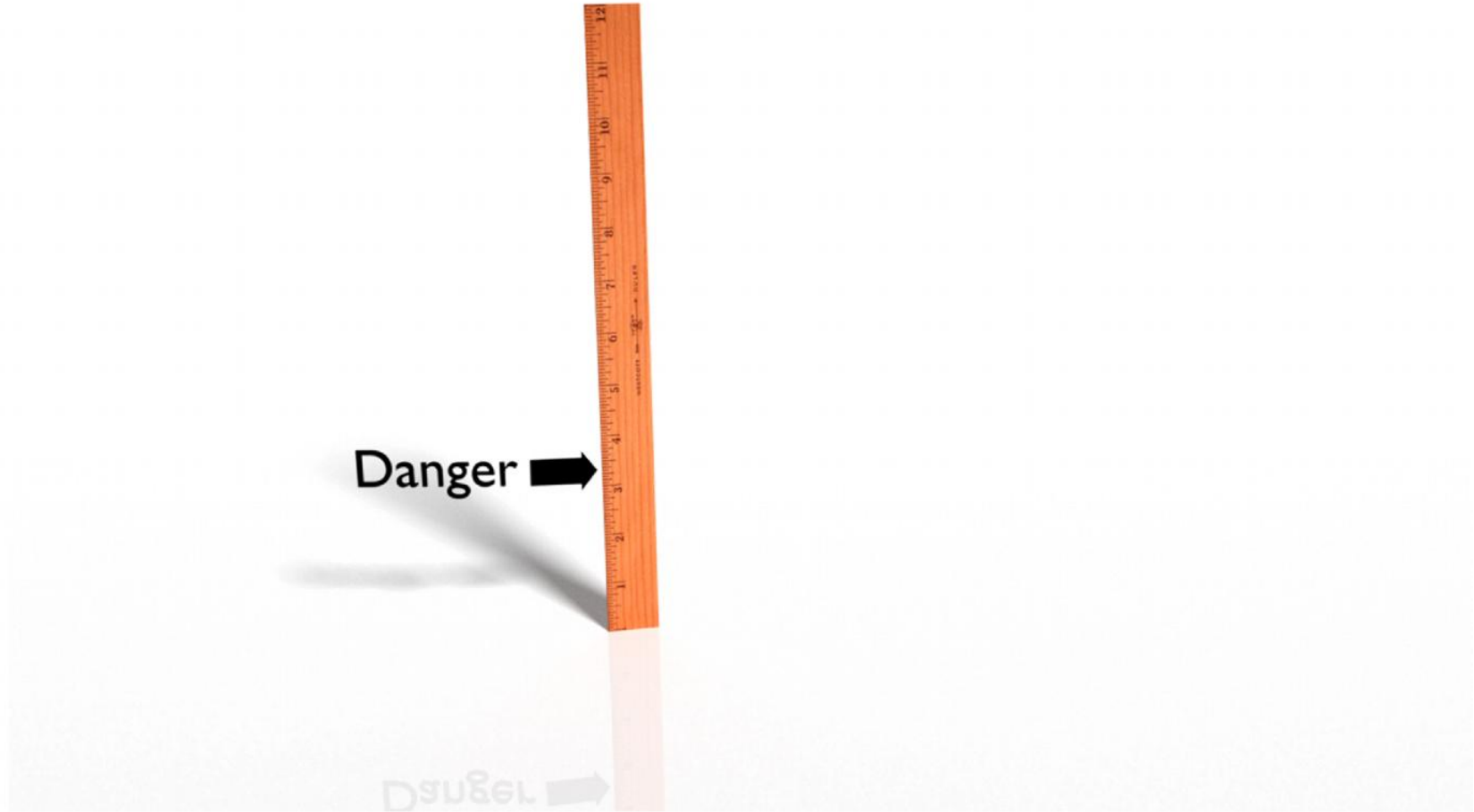






NASA.gov





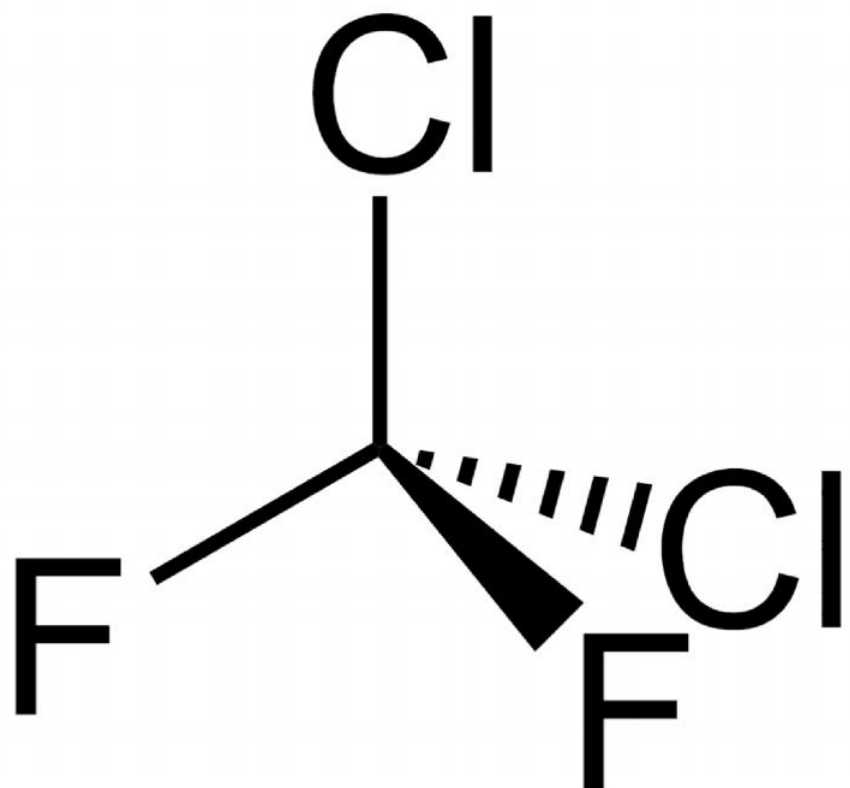
Danger

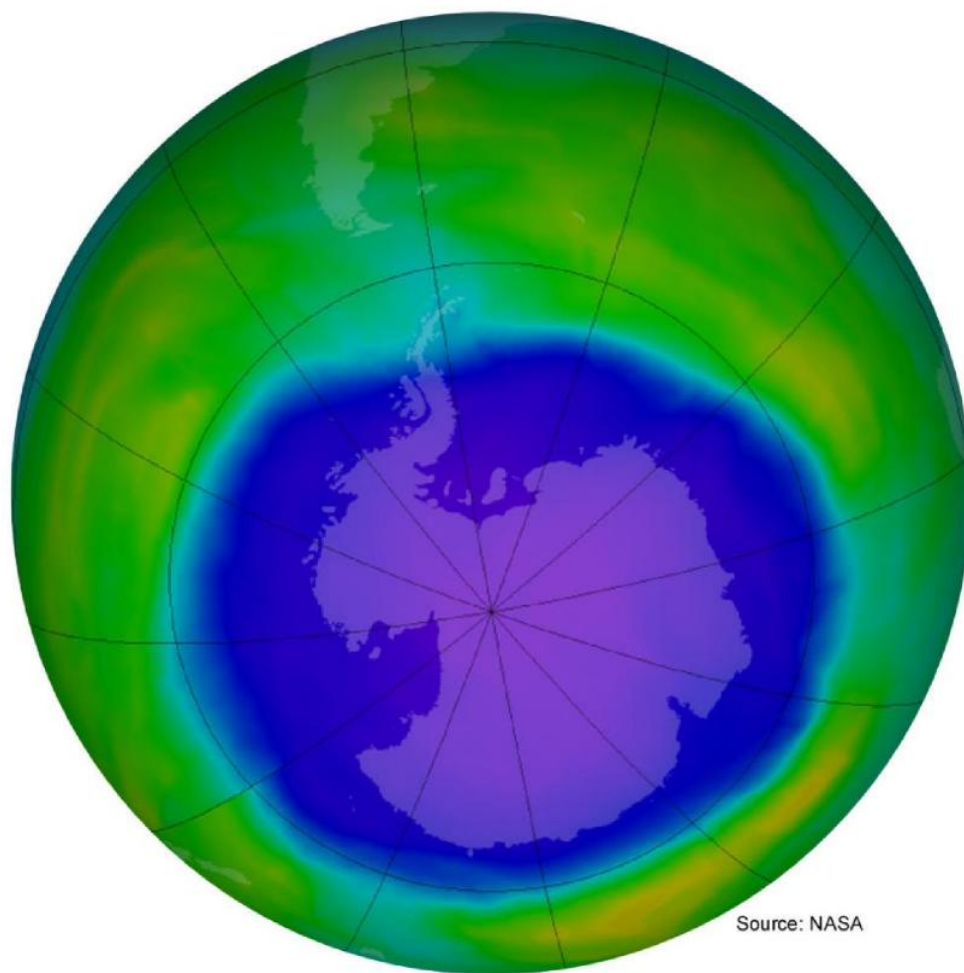
Risk  
Tolerance





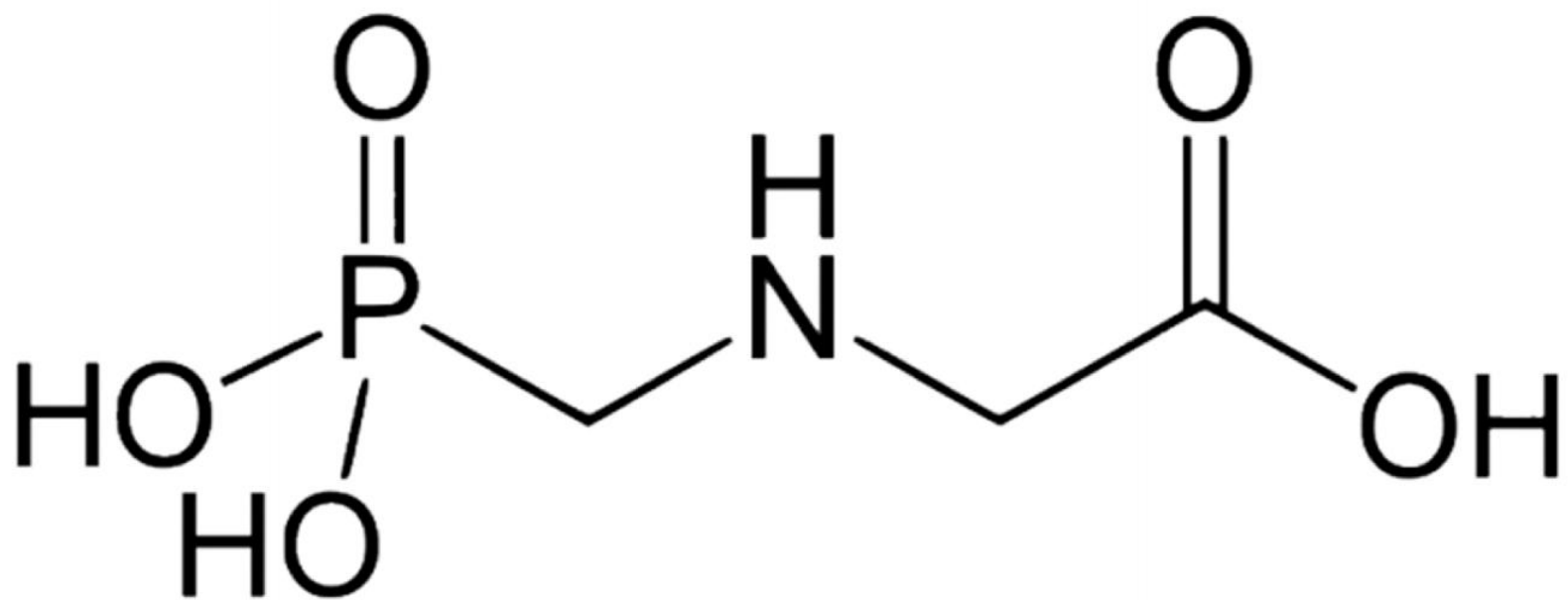






Source: NASA









**Carcinogenic  
to humans**



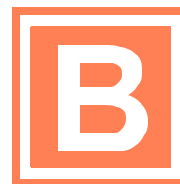
**Not classifiable  
as to  
carcinogenicity  
in humans**



**Probably not  
carcinogenic to  
humans**



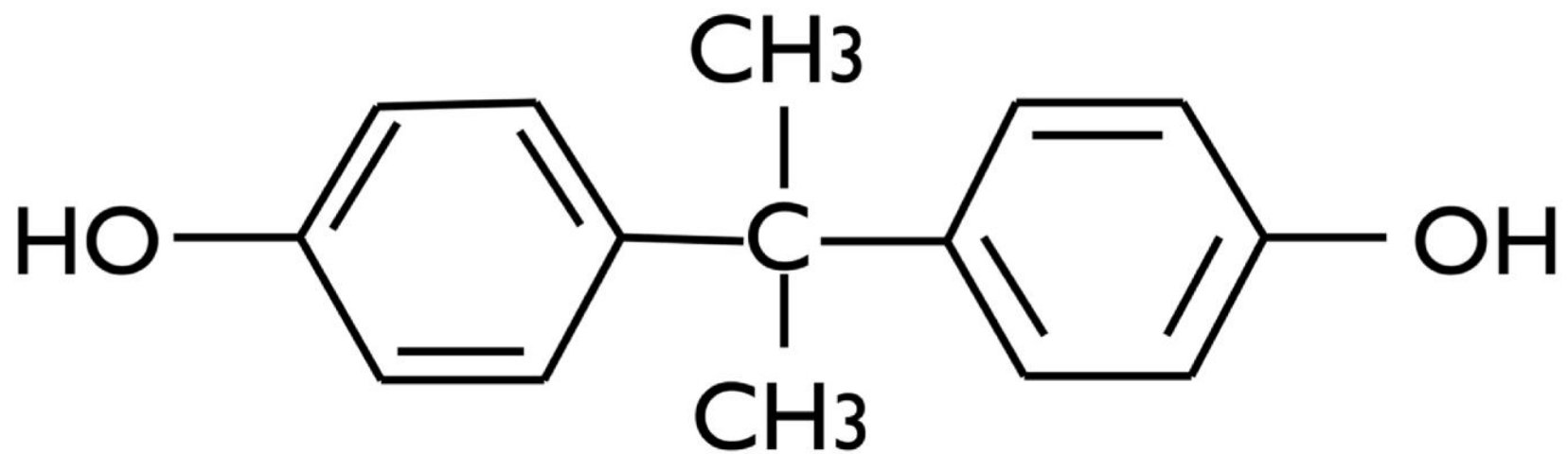
**Probably  
carcinogenic  
to humans**



**Possibly  
carcinogenic  
to humans**







# CANvera™



Dow Coating Materials

**CANVERA™**

## A Fresh Approach: CANVERA™ Polyolefin Dispersion

### Technology

# CANvera™

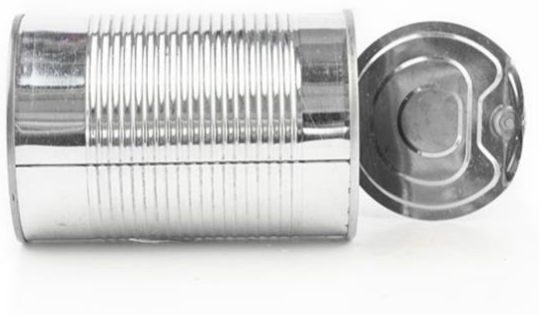
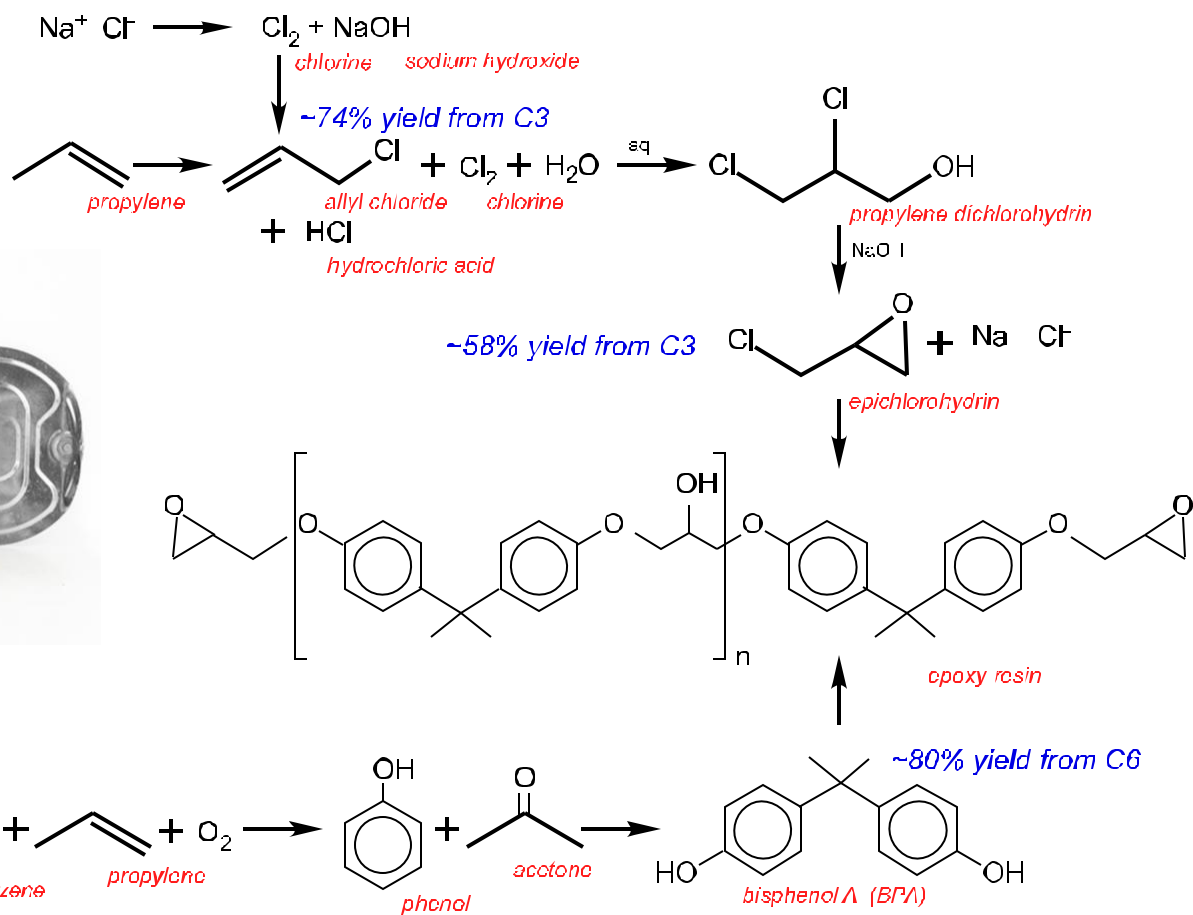
a fresh approach to can  
coatings by



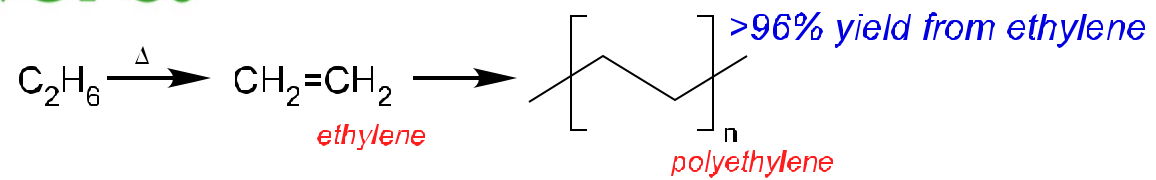
CANVERA™ Polyolefin Dispersions offers an excellent food and flavor protection profile, excellent adhesion, corrosion protection and flexibility without impact on flavor. This innovation eliminates material traditionally found in epoxy or alternative coating systems that are of concern for many consumers.

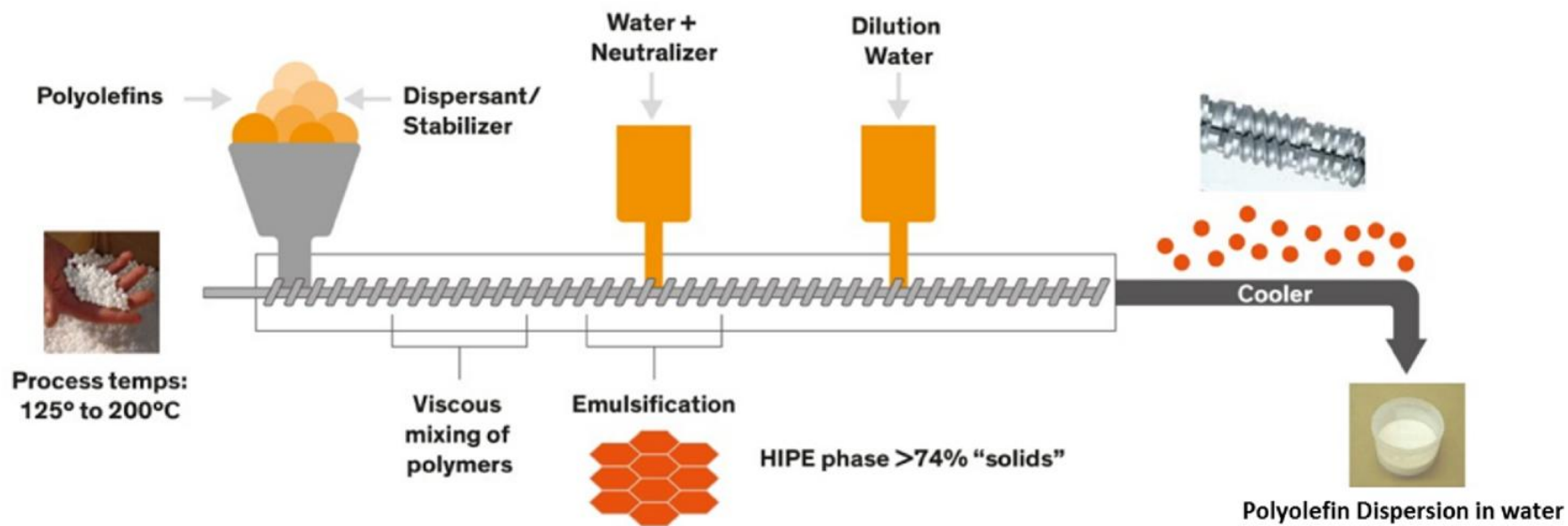


## Incumbent Epoxy Resin



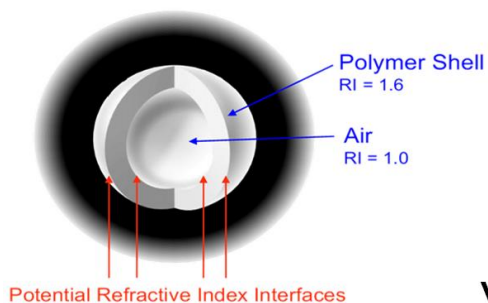
CANvera™



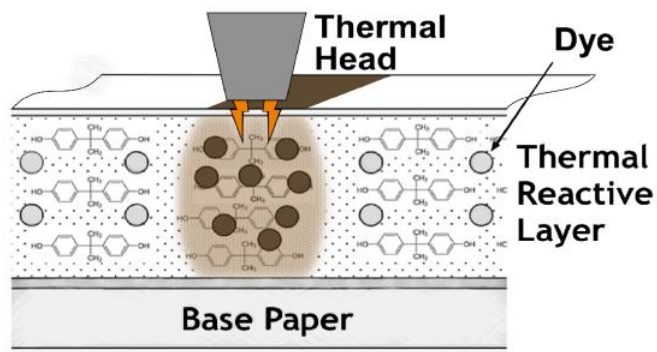


## Thermal Paper Free of Chemical Developers

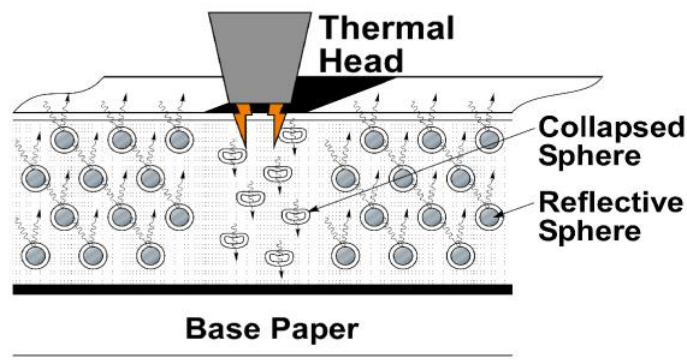
ROPAQUE™ NT-2900 Opaque Polymer for BLUE 4EST™ Thermal Paper



### Conventional



### Voided Layer Technology



2017 Presidential Green Chemistry Challenge Award  
joint with partner Koehler Paper Group

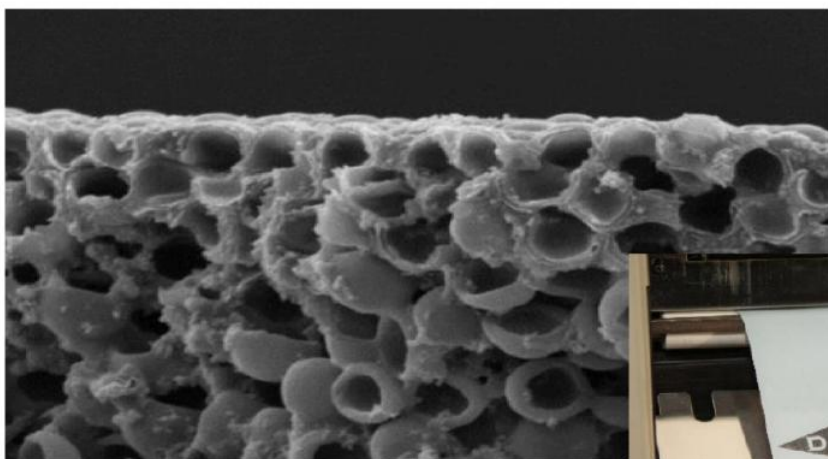




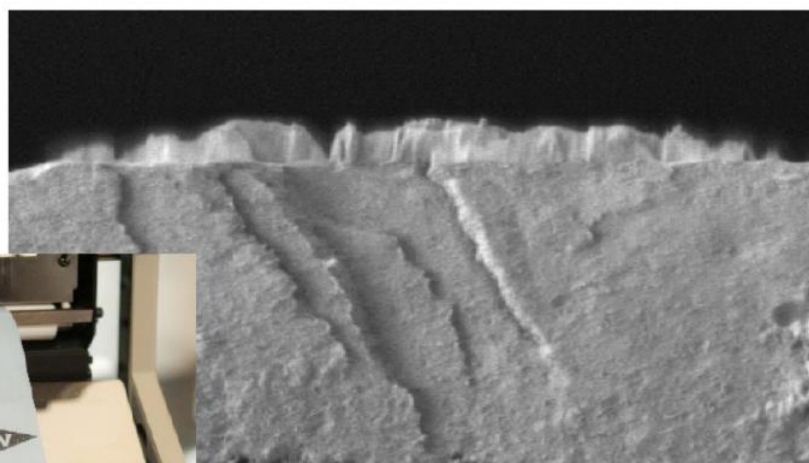
## ■ Thermal Paper Free of Chemical Developers

ROPAQUE™ NT-2900 Opaque Polymer for BLUE 4EST™ Thermal Paper

***Before Printing***



***After Printing***



2017 Presidential Green Chemistry Challenge Award  
joint with partner Koehler Paper Group



# 2025 Sustainability Goals



## Leading the Blueprint

Dow leads in developing a societal blueprint that integrates public policy solutions, science and technology, and value chain innovation to facilitate the transition to a sustainable planet and society.



## Delivering Breakthrough Innovations

Dow delivers breakthrough sustainable chemistry innovations that advance the well being of humanity.



## Advancing a Circular Economy

Dow advances a Circular Economy by delivering solutions to close the resource loops in key markets.



## Valuing Nature

Dow applies a business decision process that values nature, which will deliver business value and natural capital value through projects that are good for the company and good for ecosystems.



## Increasing Confidence in Chemical Technology

Dow increases confidence in the safe use of chemical technology through transparency, dialogue, unprecedented collaboration, research, and our own actions.



## Engaging Employees for Impact

Dow people worldwide directly apply their passion and expertise to advance the well being of people and the planet.



## World-Leading Operations Performance

Dow maintains world-leading operations performance in natural resource efficiency, environment, health, and safety.



<http://www.dow.com/en-us/science-and-sustainability/2025-sustainability-goals>



