

A vertical photograph on the left side of the slide shows a lush tropical landscape. In the foreground, there are large green banana leaves and other dense vegetation. A tall palm tree with a cluster of red flowers stands prominently. The background shows a vast, green forest extending to the horizon under a blue sky with scattered white clouds.

Welcome
Welcome

**VDMA Management Meeting
Oil & Gas, Petchem, H2, LNG
Brazil & Latam (online - EN)**

17.02.2025 15:00 – 16:30 (CET) /
11:00 – 12:30 (Brazil time)
09:00 – 10:30 (Chile time)

Compliance



Compliance rules also apply in the Online Meetings!

Violations of antitrust law can lead to substantial sanctions against participating companies, employees and associations. In your personal interest and to protect your company and the work of the associations, compliance with antitrust law is therefore of utmost importance. The individual exchange of information between companies in competition is subject to particularly strict antitrust law requirements. According to the VDMA Compliance Program, individual exchange of information with regard to the data listed here is therefore not permitted for individual products or markets. In this respect, the information must relate to the entire company or a broad product range. An exchange of competition-relevant company-specific data beyond this is not possible.

Online meeting rules:

Please switch off your micro & camera unless you speak. This should guarantee a better line. Use Chat function for questions & communication between participants.

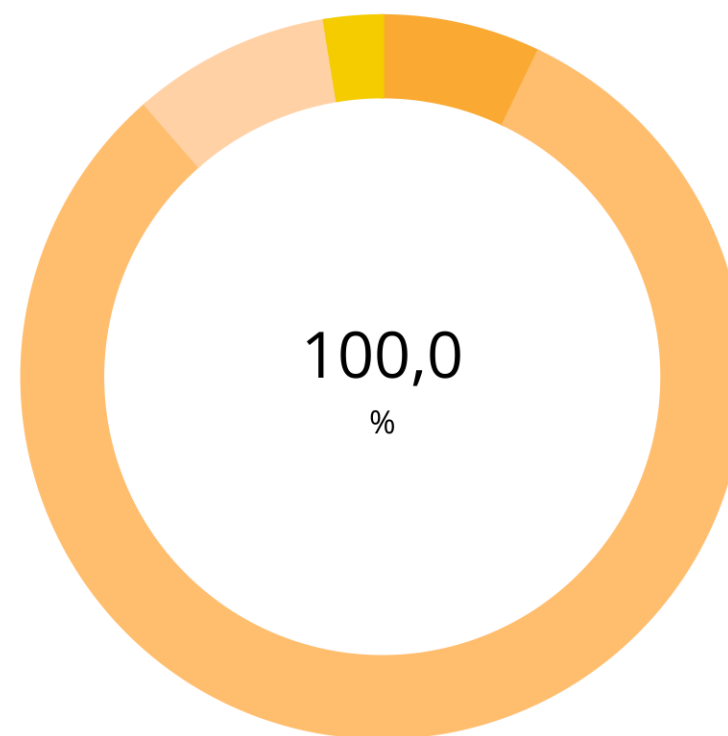
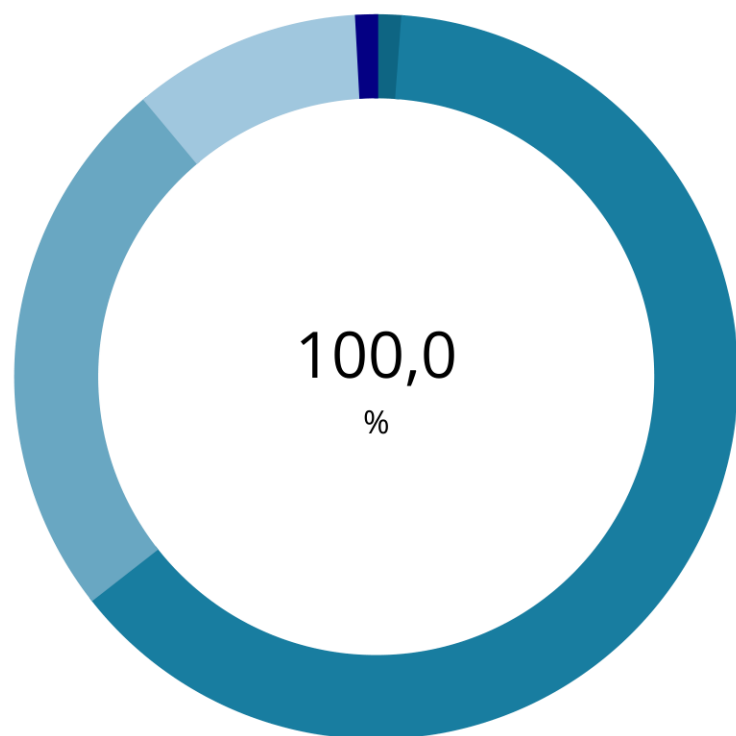
Export Market Development Process Technology - Focus Latam & Brazil

Alexandra Prawitz,
VDMA Process Plant and Equipment

Current business situation and business outlook next 6 months

Two thirds of suppliers of Oil, Gas and Petrochemical Technology describe the business situation as “good”

Evaluable answers in percent



Current situation

- 1,2 Very good
- 63,3 Good
- 24,5 Satisfactory
- 10,2 Bad
- 0,9 Very bad

Development

- 0,0 Much better
- 7,1 Better
- 81,5 Equal
- 8,8 Worse
- 2,6 Much worse

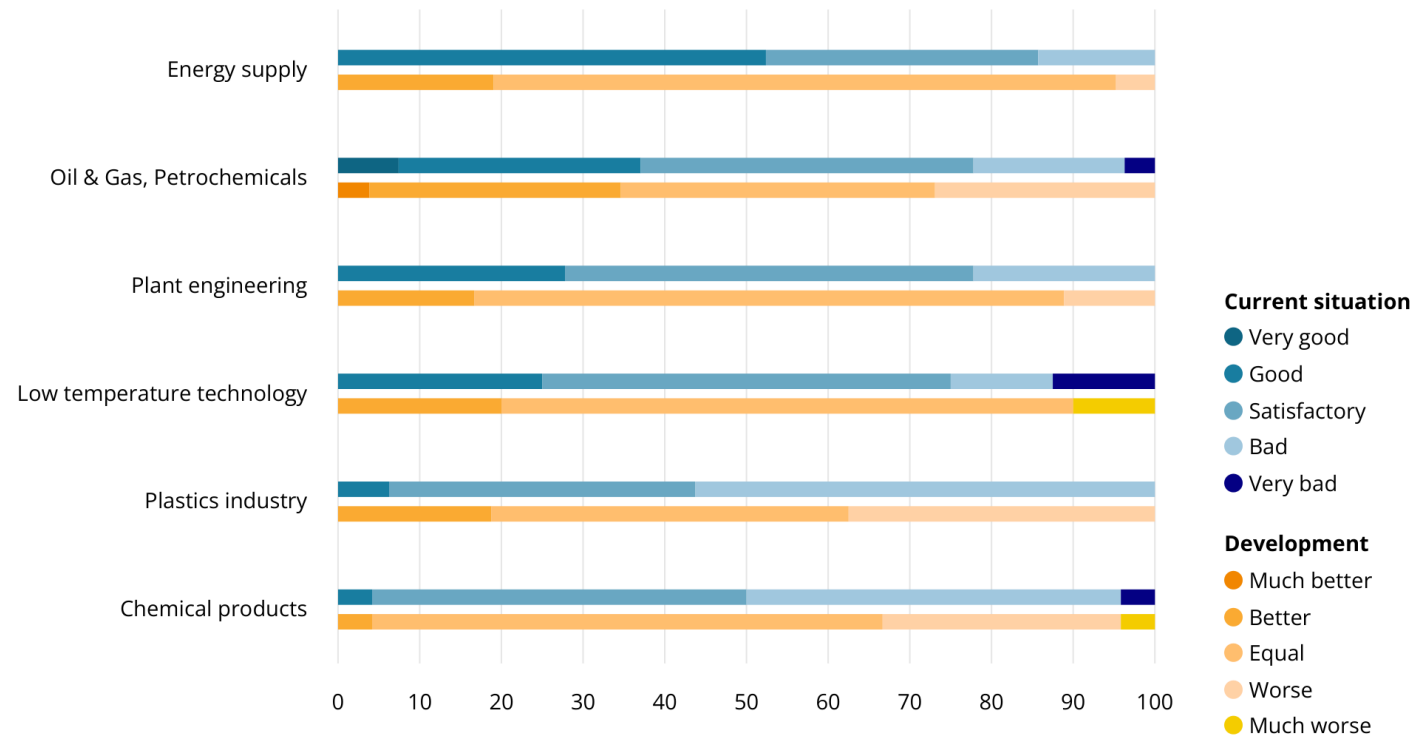
Source: VDMA-wide economic survey Q4 2024

Business situation and business outlook by customer sector

Technology for Oil, Gas and Petrochemicals



Evaluable answers in percent

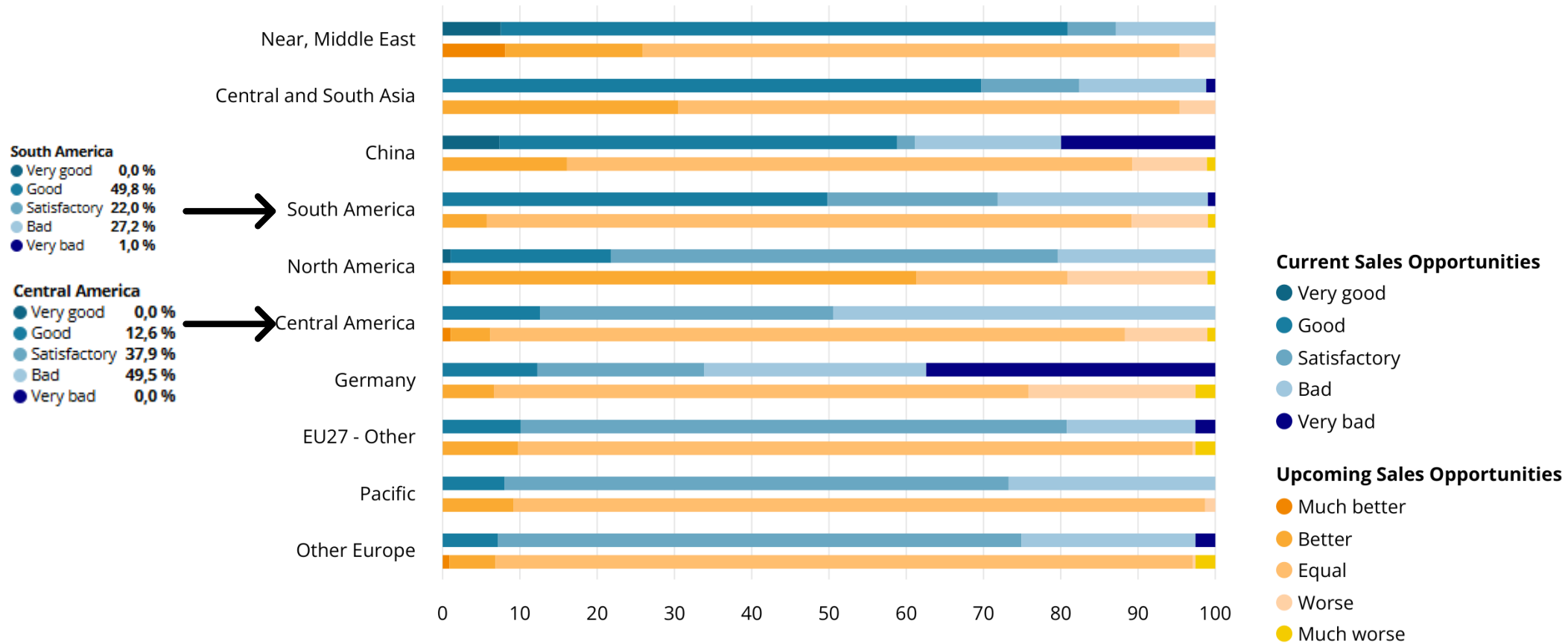


Source: VDMA-wide economic survey Q4 2024

Current regional sales opportunities and prospects Technology for Oil, Gas and Petrochemicals



Evaluable answers in percent



Source: VDMA-wide economic survey Q4 2024

German Exports- Development

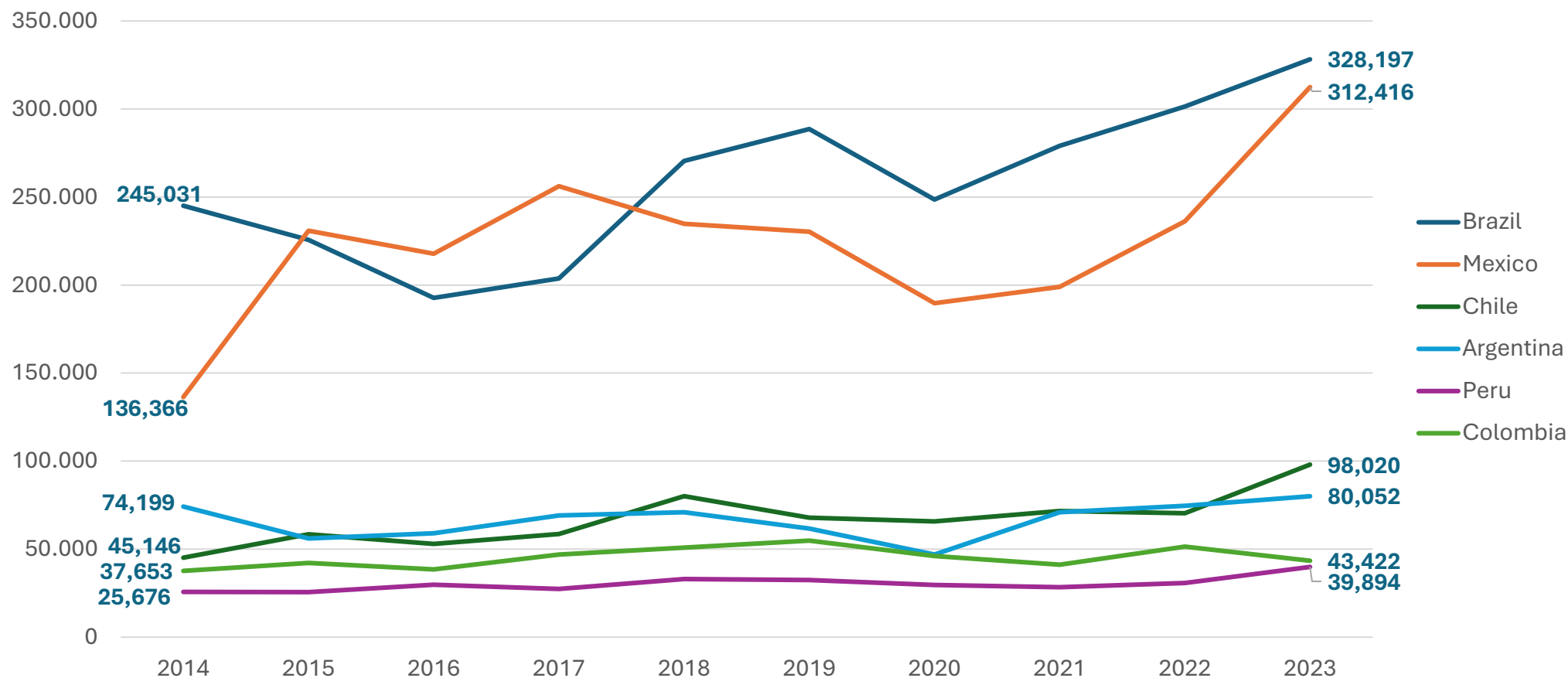
Year	Mechanical Equipment	Process technology*	% of the Mechanical Equipment exports	Process Plant and Equipment
In million Euro				
2014	6,399	704	11 %	227
2015	6,915	766	11,1 %	265
2016	6,329	726	11,5 %	259
2017	7,203	798	11,1 %	264
2018	7,213	861	11,9 %	300
2019	6,804	838	12,3 %	273
2020	5,573	716	12,8 %	239
2021	6,420	806	12,6 %	234
2022	7,417	873	11,8 %	267
2023	8,885	1,018	11,5 %	317
01-11 2024	8,211	950	11,6 %	286

Source: VDMA Statistic database

* Combination of process engineering, liquid pumps, industrial valves and compressors, vacuum and compressed air technology

Development of German Process Technology* Exports- Top 6 Markets Central and South America

In 1,000 Euro



Source: VDMA Statistic database

* Combination of process engineering, liquid pumps, industrial valves and compressors, vacuum and compressed air technology



Alexandra Prawitz

VDMA Process Plant and Equipment

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Agenda

mentioned times are CET; i.e. Brazil time is 4, Chile 6 hours ahead!

- 15:00** **Welcome, compliance and Introduction**
Fabiane Wahlbrink, VDMA Brazil; Ragnar Strauch, VDMA Forum Process Technology
- 15:10** **Current Export Market Development Process Technology - Focus Latam & Brazil**
Alexandra Prawitz, VDMA Process Plant and Equipment
- 15:25** **Oil & Gas, Petrochem, Biomass, H2, LNG Markets & Projects Latam & Brazil**
3' statements by all participants
- 16:10** **Do we need a LNG, Oil & Gas, H2 Delegation to Buenos Aires & Neoquen in 2026 ?**
Emanuel Frank & Team, AHK Argentina
- 16:20** **Oil & Gas, H2, Biomass, Petrochem related activities by AHK Rio in Brazil**
Andreas Olpp & Luiza Freire, AHK Rio de Janeiro
- 16:30** **sector related VDMA events & activities + Final Words**
Ragnar Strauch, VDMA Forum Process Technology, Fabiane Wahlbrink, VDMA Brazil



Members' Meeting Process Plant and Equipment



27. March 2025, 13:30 o'clock



VDMA Frankfurt



Registration and agenda at
[VDMA Member's Meeting](#)



Is the German chemical industry at a
turning point?

Where is the US market heading to?

VDMA Brazil Events 2025



Plastics and Rubber Sector

- » Plástico Brasil Trade Fair | March 24–28 | São Paulo
 - Management Meeting | March 24, 7:00 PM | São Paulo
- » **Mining and Construction Sector**
 - Management Meeting | June 4 | Haver & Boecker, Monte Mor, SP
 - EXPOSIBRAM 2025 Trade Fair | October 28–30 | Salvador
 - Potential Mining Sector Delegation
- » **Food, Packaging, and Processing Sector**
 - Fispal Tecnologia - Trade Fair
 - Management Meeting | Held alongside the trade fair
- » **Other Events**
 - IFAT Brazil 2025 - Trade Fair | June 25 - German Pavilion | June 24–27



Upcoming events



- 12.03.2025, 9:30 - 16:00 Uhr, VDMA Frankfurt
VDMA Specification 69243-X – Requirements for Industrial H2 plants in Germany & Europe (EN/DE)*
- 17. – 18.03.2025, Amsterdam
VDMA European Summit 2025 - Engineering the Future (EN)
- 27. March 2025, 13:30 o'clock
Members' Meeting Process Plant and Equipment (EN/DE)*
- 28.03.2025, 8:30 - 16:00 Uhr, VDMA Frankfurt
Global Oil, Gas, Petrochem, Low-Carbon Markets - Experts Meeting - Focus Digitalization & MENA/Africa - (EN).
- 7. – 8.05.2025 – Frankfurt **Energy Networking Day (DE)***
(C-level event, for VDMA members + energy intensive sectors, policy, banks, investors, project developers)



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Thank you
Thank you
for your attention!

