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Enabling support to advance sustainable finance to implement GFC Target D3

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CHANGE|chemistry

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Key messages

- Chemistry innovation and value chain integration have long time frames from R&D, to manufacture, to application – given “incumbency of existing chemistries and processes”
- Often safer and more sustainable chemistries cost more and must be incentivized
- The finance sector is critical to providing clear signals and “patient” capital to advance sustainable chemistry, knowing there is a long pathway to change.

Change Chemistry: A mission to drive growth in sustainable chemistry

- At **Change Chemistry**, we are guided by our **VISION** of a global economy where all chemicals, materials and products are safe and sustainable - from creation through to disposal and reuse.
- Our **MISSION** is to catalyze the identification, assessment, development and commercialization of sustainable chemistries to improve human health, protect our planet and drive economic value. We do this by:
 - Fostering value chain collaboration
 - Cultivating first-movers
 - Convening industry decision-makers to secure meaningful commitments
 - Advocating for a supportive policy environment



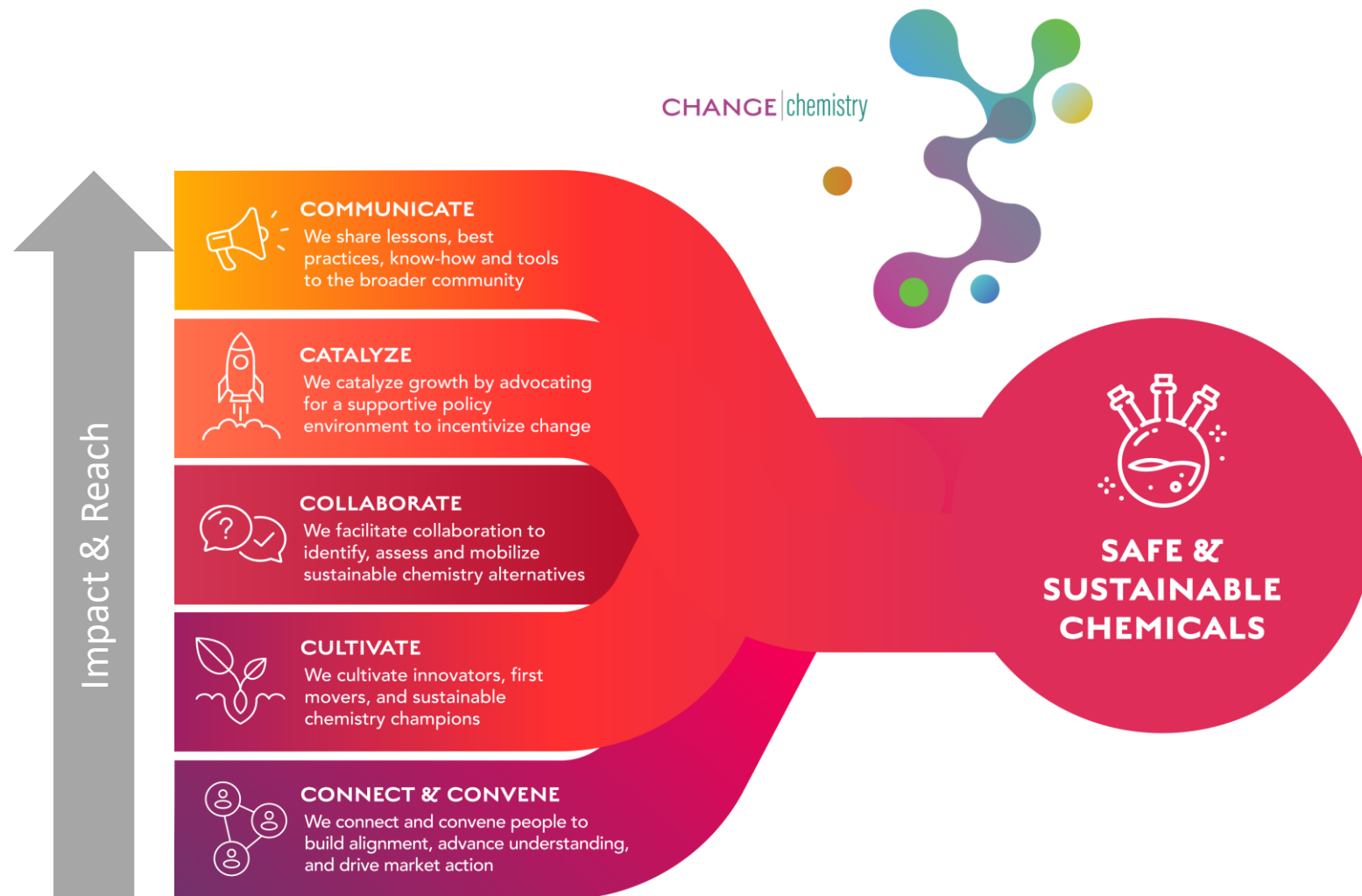
Strength in numbers



- Our retailer, consumer goods and chemical company members represent over **\$3.5T** in economic turnover
- Our 128 (and growing) members also include innovative start-up companies, strategically aligned service providers, and NGOs.
- Unified by a common goal of transforming value chains to maximize triple-bottom-line performance – people, planet & profit

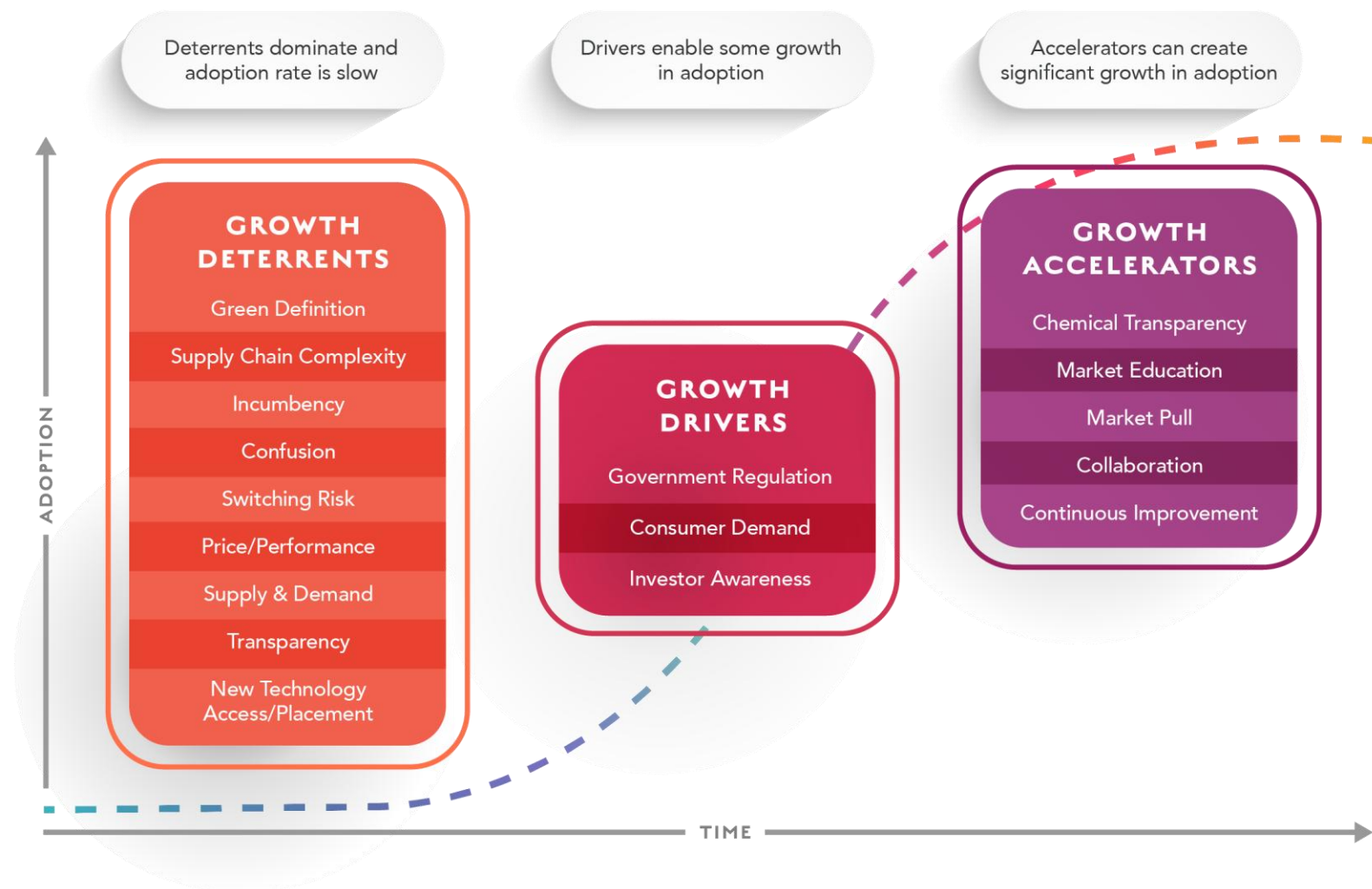
Achieving impact through collaboration

- It's not up to any one individual or organization to mobilize sustainable chemistry to address these challenges
- All stakeholders – retailers, consumer goods manufacturers, chemical companies, policy makers, advocacy groups and academe – need to engage, create and collaborate



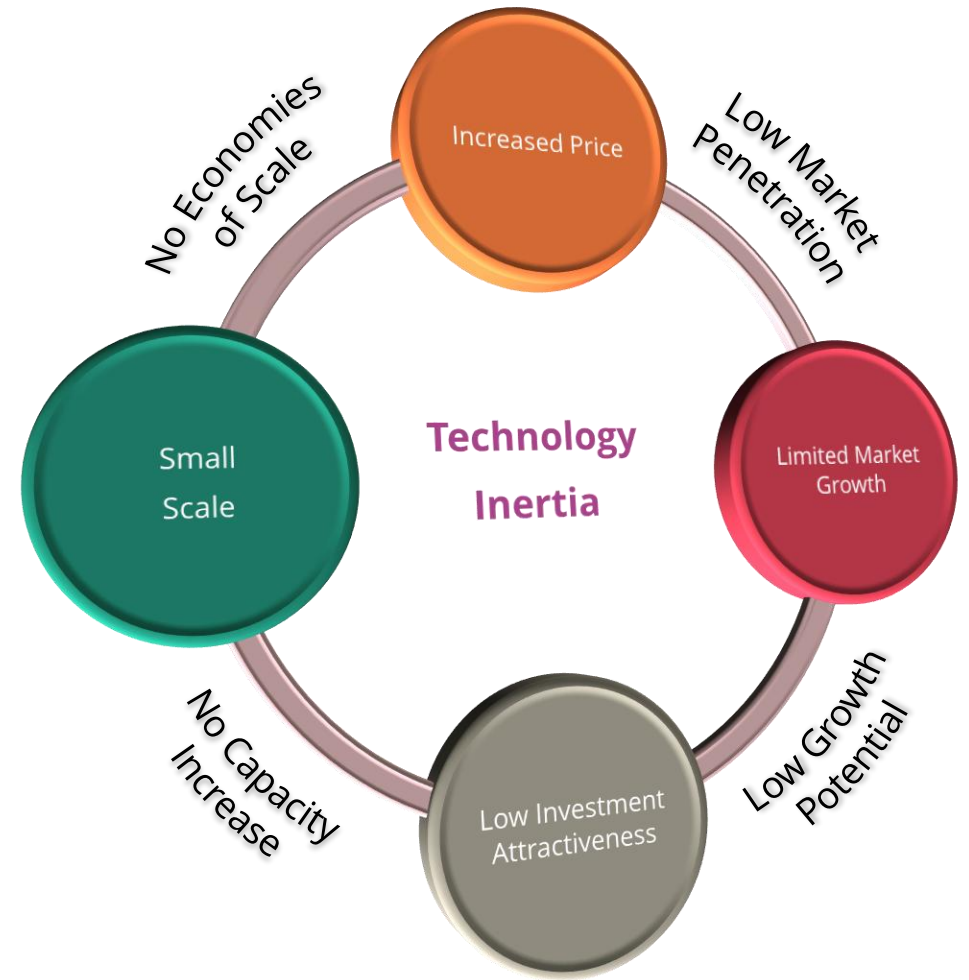
So, what's the holdup?

- The number of growth deterrents exceeds the number of drivers and accelerators
- While government regulations and consumer awareness establish urgency, growth will be accelerated through chemical transparency, enhanced education, market pull, collaboration and continuous improvement



Challenges to sustainable chemistry technologies at scale

- The interplay between scale, price, growth potential and investment attractiveness causes a technology inertia that favors incumbent technologies
- A collaborative approach is needed to:
 - Overcome Technology Inertia
 - Mobilize public and private investment
 - Address risk of new technologies
 - Create policy incentives
 - Demand pull
 - Bridge gap in costs to ensure innovator competitiveness



But business benefits of sustainable chemistry are becoming clearer

FIGURE ES.3
Market growth of green chemistry products.

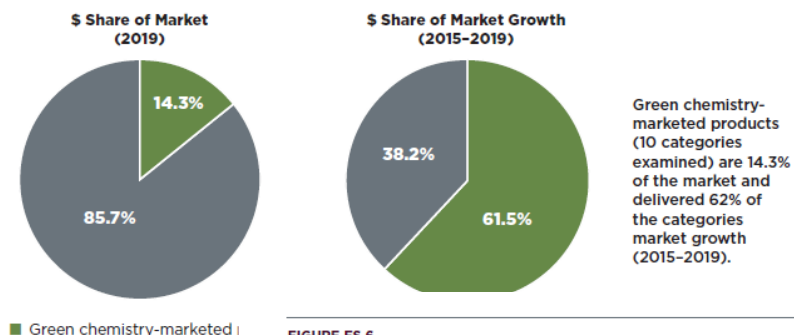
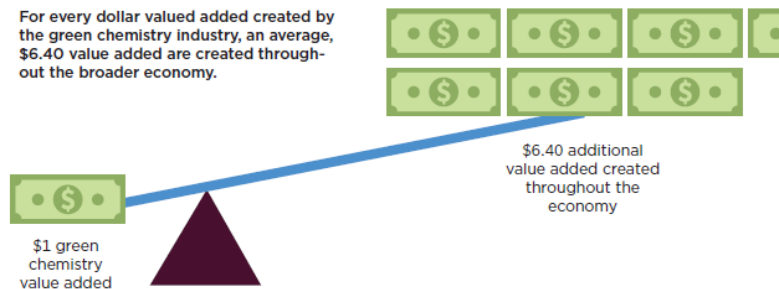


FIGURE ES.6
Green chemistry value added multiplier.



Green Chemistry
A Strong Driver of Innovation, Growth, and Business Opportunity
OCTOBER 2021

AMERICAN SUSTAINABLE BUSINESS COUNCIL

GC3
GREEN CHEMISTRY & COMMERCE COUNCIL
Business Mainstreaming Green Chemistry

UMASS Lowell

UNIVERSITY

Making the Business & Economic Case for Safer Chemistry

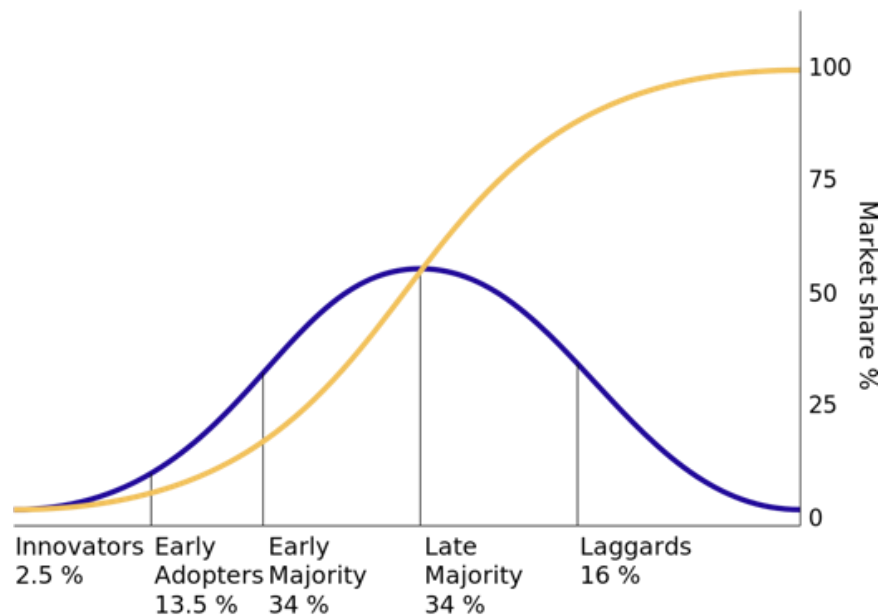
Report for the American Sustainable Business Council and Green Chemistry & Commerce Council

<https://greenchemistryandcommerce.org/documents/uml-rpt-GreenChem-1.22-12.pdf>

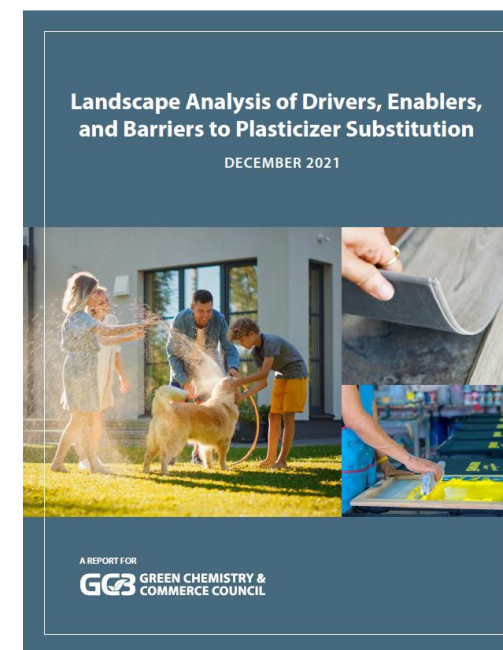
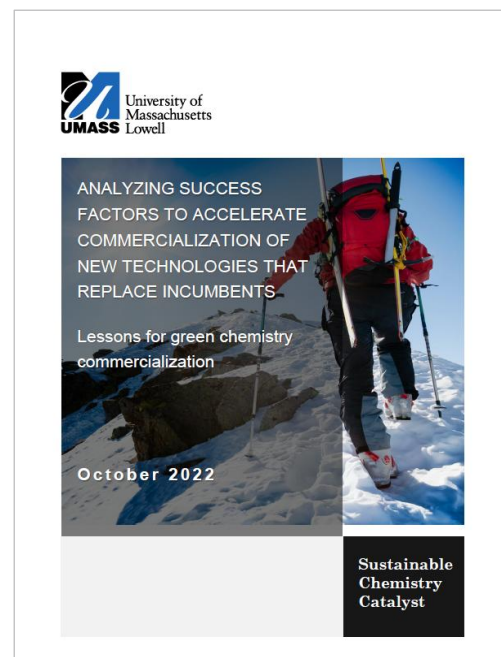
So...how do we make progress faster...



We're learning about needs to create tipping points or "domino effects"



From Rogers: Diffusion of Innovations (1962)

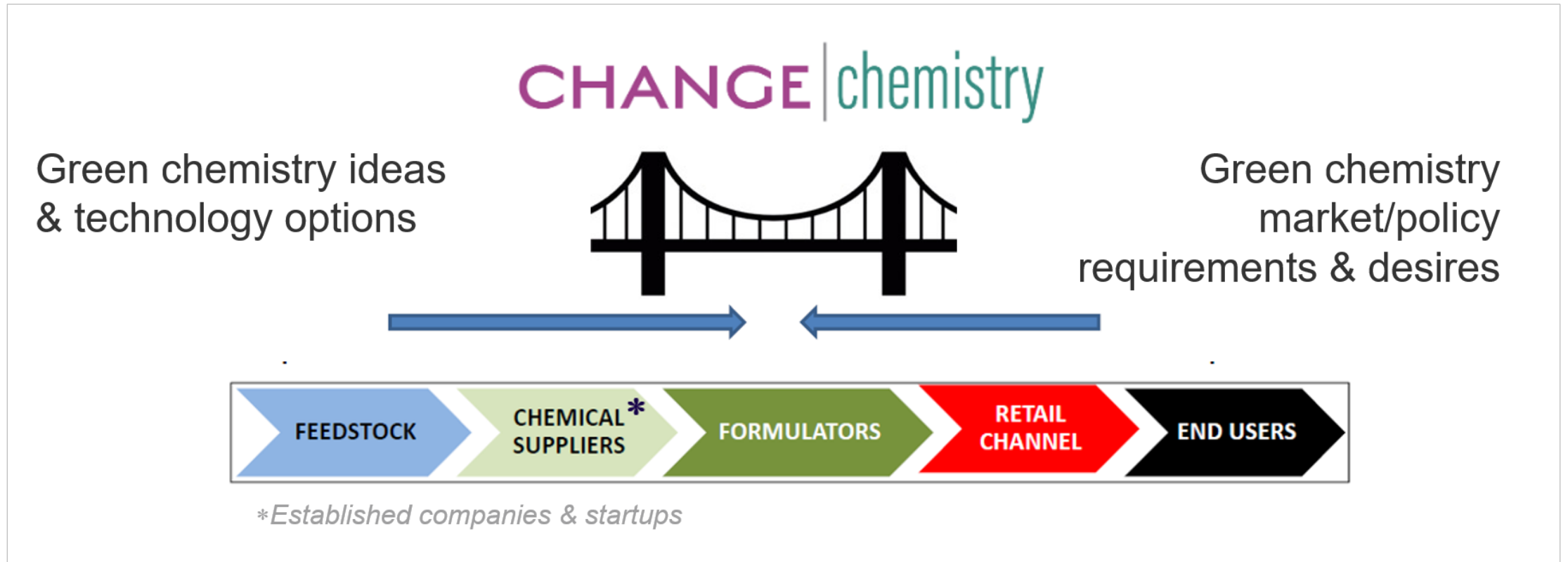


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Tipping points

- Supportive government policy – linked to strategic needs
 - Incentives – production and adoption
 - R&D support from early stage to capitalization
 - Alignment and public-private investment
- Unified demand signals – procurement; large purchasers
- Investor pressure/support
 - Move from quarterly profits to long term benefits
 - Patient capital – early stage to capital build outs
 - Offtakes– absorb market risk to adoption
- Market leader commitments
- Pre-competitive value chain collaboration – demonstrating proof of concept in easier to address higher margin applications
- Ultimately – what addresses barriers and scales enablers...

Changing chemistry requires engaging the entire value chain



How to grow sustainable chemistry....

with plenty of so-called patient money
while maintaining a prayerful
attitude....ingenuity and foresight.

-Willard Dow, 1942

INNOVATORS ROUNDTABLE



Hosted by:

BATTELLE

Columbus, OH
September 9-11, 2025

Thank you!

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For more information, please visit:

Change Chemistry | member.changechemistry.org

Sustainable Chemistry Catalyst | sustainablechemistrycatalyst.org