KPMG

KPMG 2025 Global Energy, Natural Resources and Chemicals

CEO Outlook

KPMG. Make the Difference.

Foreword

Energy, natural resources and chemicals (ENRC) CEOs continue to face a turbulent world, characterized by fluctuating trading conditions, conflicts, supply chain interruptions, and regulatory uncertainty. The disorderly energy transition sees rising output for both fossil fuels and renewables to satisfy an insatiable demand — particularly for electricity to power cooling systems, electric vehicles and data centers. Mining companies are in a race to efficiently extract rare earth minerals that underpin renewable technologies — whilst minimizing the environmental impact of their operations. And, with the chemicals sector in a long down-cycle, high inflation and interest rates, together with low growth are a threat to profitability in such capital expenditure-intensive industries.

There are significant regional variations, with momentum for renewables stalling in Europe, yet surging ahead in China. Renewable deployment in non-OECD countries has grown at twice the rate of OECD countries over the past decade, as both energy demand and investment shifts toward fast-growing markets.

Energy efficiency is another major priority, driving innovations like EVs, heat pumps, LED lighting and smart grids, while battery electricity storage capacity is also increasing, but not at the required pace. As energy demand remains high, emissions are increasing, jeopardizing the success of the Paris agreement targets.

Against this backdrop, the 2025 CEO Outlook survey presents a barometer of how CEOs across the global ENRC sector are tackling the major economic, technological, geopolitical regulatory, and talent challenges. Artificial intelligence (AI) is playing an ever-greater role in every aspect of the sector, from raising innovation, operational and back-office efficiency, to reducing risks and supporting planning and reporting. This year's survey findings reflect the importance of AI, and its impact across the complete range of top-table issues.

In an unpredictable world, CEOs need to be highly informed to plan ahead, tackle forthcoming obstacles and take advantage of new opportunities.

Anish De
Global Head of Energy, Natural Resources and Chemicals
KPMG International

Executive summary

Despite concerns about an uncertain economic and geopolitical environment, the CEOs taking part in our annual survey are broadly optimistic about the prospects for the ENRC sector as a whole, and their companies in particular.

Amongst the key challenges are inflationary pressures, regulatory demands, geopolitical conflicts, technology infrastructure to drive digital transformation, and internal capabilities to manage AI. CEOs are responding by investing in supply chain resilience, integrating AI, and upskilling the workforce. AI has rapidly moved from pilot phase to become a central element of operations, reflected in raised expectations of a return on investment in this technology within 1–3 years. Nevertheless, CEOs are also highly aware of related issues such as ethics, inadequate data, and lack of AI skills, all of which could hamper progress.

Mergers and acquisitions (M&A) remain on the agenda — notably for renewables and digital assets — suggesting an increased appetite for inorganic growth.

Environmental, social and governance (ESG) may have been pushed back in some regions, but is likely to become ever more critical. Many ENRC CEOs have made ESG a central part of corporate strategy, with AI set to boost their efforts to reduce emissions, improve energy efficiency and enhance reporting.

The impact of AI on the workforce is significant, with CEOs concerned about upskilling, to make the most of new technologies. In response, companies across the sector are keen to retain and re-train high-potential talent.

CEOs have an exciting opportunity to shape the future of ENRC, to provide secure, sustainable energy sources for a technology-driven world.

> “In uncertain times, ENRC companies are looking to balance growth with cost efficiency, satisfying rising energy demand whilst managing the transition to cleaner energy resources.”
>
> **Anish De**
> Global Head of Energy, Natural Resources and Chemicals, KPMG International

Key findings

Economic outlook and business confidence

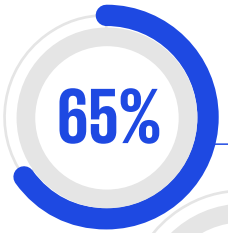
84% of CEOs in the ENRC sector are confident in industry growth, up from 72 percent last year.

Top challenges influencing short-term decisions:

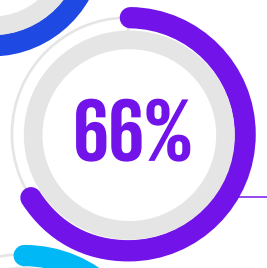
1. Supply chain resilience
2. AI integration
3. Growing impact of climate and environmental risks

55% of CEOs anticipate 'moderate' deal activity in the next three years, up from 38 percent in 2024

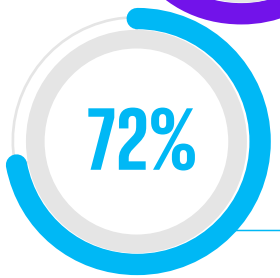
AI-powered technological innovation



65% of CEOs say AI is as a top investment area — a 12 percent increase from 2024



66% of CEOs expect returns from AI investment within 1–3 years, up from 15 percent last year



72% of CEOs plan to allocate 10–20 percent of their budgets to AI initiatives in the coming year.

Tuning your workforce into an AI world

40% of CEOs are actively reskilling and upskilling roles affected by AI

The gap between existing and desired skills is the biggest challenge in attracting and retaining AI talent

80% of CEOs agree their leadership understands AI's disruptive potential

Achieving strategic advantage through ESG

72% of CEOs say sustainability is embedded in their corporate strategy

62% of CEOs are confident in meeting 2030 net-zero targets — but over half admit their ESG strategies lag behind stakeholder expectations.

82% of ENRC CEOs believe AI can support emissions reduction and energy efficiency

Economic outlook and business confidence

Despite the complex economic challenges facing ENRC CEOs, optimism is rising, with 84 percent confident in mid-term industry growth — up from 72 percent last year.

These findings reflect rising demand for both fossil fuels and renewable energy sources, and advances in energy storage systems, smart grids, carbon capture, and AI-enabled energy management. The rapid growth in renewables and data centers calls for significant amounts of copper and other rare earth minerals.

Although 78 percent are positive about their own company's growth prospects, this represents a slight decline from the 2024 figure of 82 percent. Factors such as a fast-changing regulatory environment, trade uncertainties, and rising cost pressures may be weighing heavily on some chief executives, who are keen to take cost out of the business. The chemicals sector in particular has been impacted by high inflation and interest rates and remains in a down-cycle.

On the back of operational efficiencies, energy transition investments, and digital transformation, earnings expectations are stabilizing: 44 percent of CEOs project moderate annual earnings growth (2.5 percent–4.99 percent), up from 30 percent last year, while no CEOs expect negative growth.

84%

of CEOs are confident in industry growth vs 72 percent last year

"Geopolitics has a major influence on ENRC companies, who must navigate varying regulatory environments around the world, with differing appetites for the energy transition. CEOs need to balance investment in fossil fuels and renewables and keep projects economic throughout their life cycle."

Jonathon Peacock
Lead of Global Oil and Gas
KPMG International

M&A goes more strategic

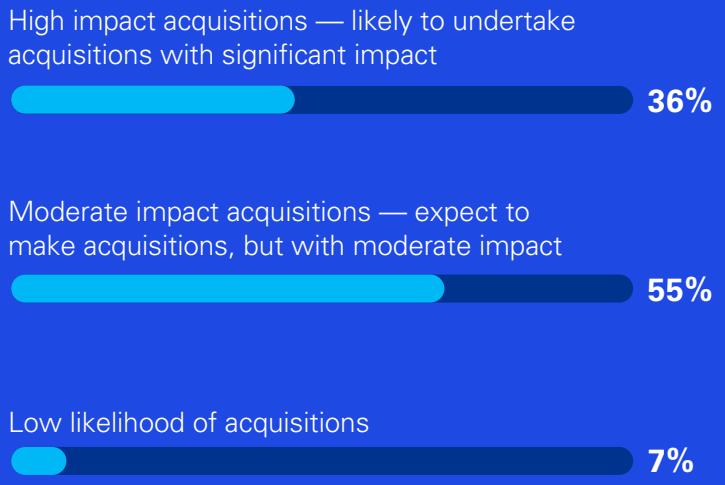
ENRC firms appear to be recalibrating their merger and acquisition (M&A) strategies, with a shift towards more targeted deals. Just 36 percent of CEOs expect to pursue 'high-impact' acquisitions in 2025 — down from 58 percent in 2024 — while 55 percent anticipate 'moderate' deal activity, a rise from 38 percent last year. The large national and international oil companies may have scale, but by investing in smaller, more agile players, they have an opportunity to reduce bureaucracy and speed up projects.

Given the rough ride faced by the chemicals sector, oil and gas conglomerates may be tempted to divest their chemicals assets to rebalance their portfolios. Interestingly, CEOs say inorganic growth is the top operational priority to achieve growth over the next three years, as they pursue greater energy security, build digital infrastructure, and scale renewables. In the US alone, data centers are projected to consume 8.6 percent of total electricity by 2035.

"With new discoveries in copper and major metals diminishing in the past decade, and 15-plus years to bring deposits to market, M&A is increasingly seen as an option to augment organic growth."

Trevor Hart
Lead of Global Mining
KPMG International

M&A appetite over the next three years



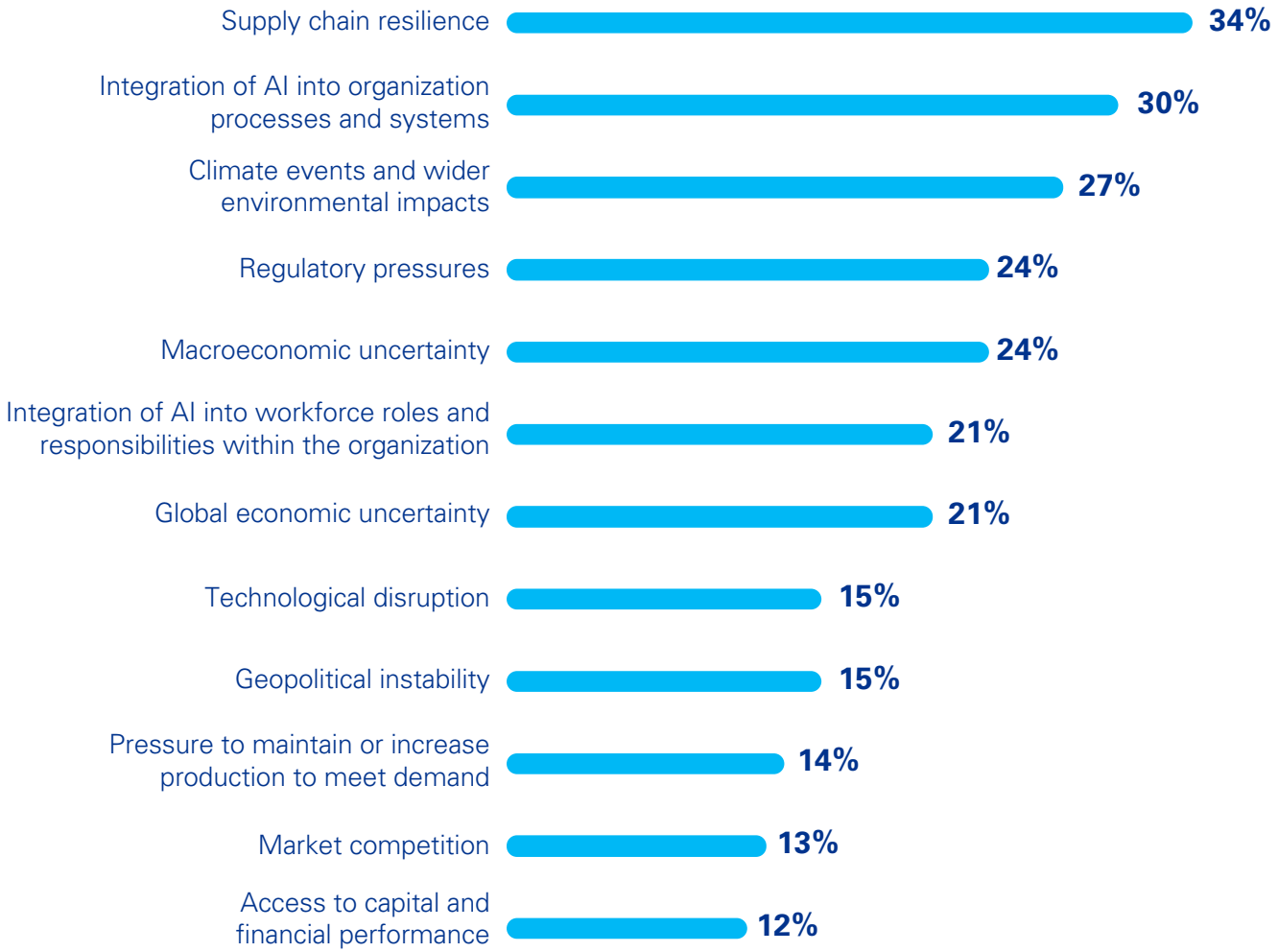
Building resilience

It's been a volatile few years for the ENRC supply chain, due to fiscal instability, cybersecurity threats, tariffs, geopolitical conflicts, and extreme weather. According to the KPMG International report Turning the tide in scaling renewables, 84 percent of respondents say geopolitical challenges are causing substantial delays in, or even the abandonment of renewable energy projects. Additionally, 61 percent of renewable energy industry stakeholders cite supply chain risks as a significant obstacle to scaling renewable energy projects.

Perhaps not surprisingly, the CEO Outlook finds supply chain resilience (34 percent) as the number one challenge driving short-term decisions, followed by AI integration (30 percent) and climate events and wider environmental damage (27 percent) — a sign that CEOs are clearly focusing on future-proofing their operations. Energy providers are grappling with the limitations of their grids, as they seek to support a hybrid system. The relative unpredictability of renewable energy sources makes it harder to match supply and demand — which may explain the investment in AI to create smarter grids.

CEOs in the sector also cite regulatory pressures and macroeconomic uncertainty (both 24 percent) as significant issues on their agendas — which helps to explain why four-fifths (80 percent) feel under increasing pressure to ensure the long-term prosperity of their business. When asked what kind of leadership is needed to manage these challenges, respondents cite key future leadership capabilities to be ESG accountability; agility and faster decision making; transparency; global/geopolitical perspective; and regulatory understanding.

Top challenges driving short-term decisions



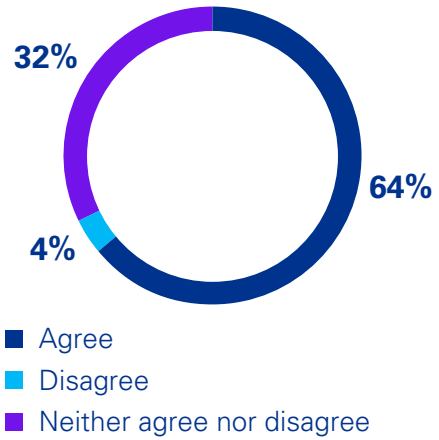
AI-powered technological innovation

More and more senior leaders in the ENRC sector view AI as a game-changer that offers more than just incremental benefits. Generative artificial intelligence (GenAI) is driving operational efficiency, cybersecurity and, increasingly, innovation in the form of smart grids, green digital twins (to model the impact of geopolitical and environmental change), and autonomous systems.

ENRC CEOs increasingly recognize this potential, with almost two-thirds (65 percent) identifying Gen AI as a top investment opportunity — a 12 percent increase on 2024.

The rapid deployment of Gen AI and Agentic AI is reflected in a rising investment in this technology, with 72 percent of CEOs planning to allocate between 10 percent to 20 percent of their budgets to AI initiatives over the next year. Senior sector executives are also becoming more optimistic about AI investments, with 66 percent expecting returns within 1–3 years — up significantly from just 15 percent in 2024. At the same time, there is a recognition of the need to balance short-term returns with longer-term energy transition goals.

GenAI as a top investment opportunity



AI is fundamentally reshaping the oil and gas sector by unlocking transformative gains in productivity, accuracy, and efficiency across both core operations and enterprise functions. From optimizing drilling and reservoir performance to maximizing profitability in refining and renewable assets, and streamlining supply chains and finance, AI empowers faster, data-driven decisions that reduce risk and drive sustainable value. It's not just automation — it's the foundation for smarter, more agile, and future-ready operations."

Shreyansh Upadhyay
Lead of Global AI for ENRC
KPMG International

By some distance, the two key benefits of AI are seen as efficiency gains (21 percent) and enhanced decision-making (20 percent). Such responses indicate that ENRC companies are enjoying tangible improvements from automating routine operations, optimizing asset performance through predictive maintenance, and real-time analytics across complex energy systems. For mining, the biggest value driver is what's in the ground, and AI can enhance the discovery process by analyzing vast amounts of old and new drilling data and pinpointing deposits. This adds greater predictability to reduce the volatility of outcomes. Other innovations already in play include robots and driverless vehicles, while Agentic AI is helping ENRC players in driving frequent and complex processes autonomously — for example in finance, procurement, audit, etc.

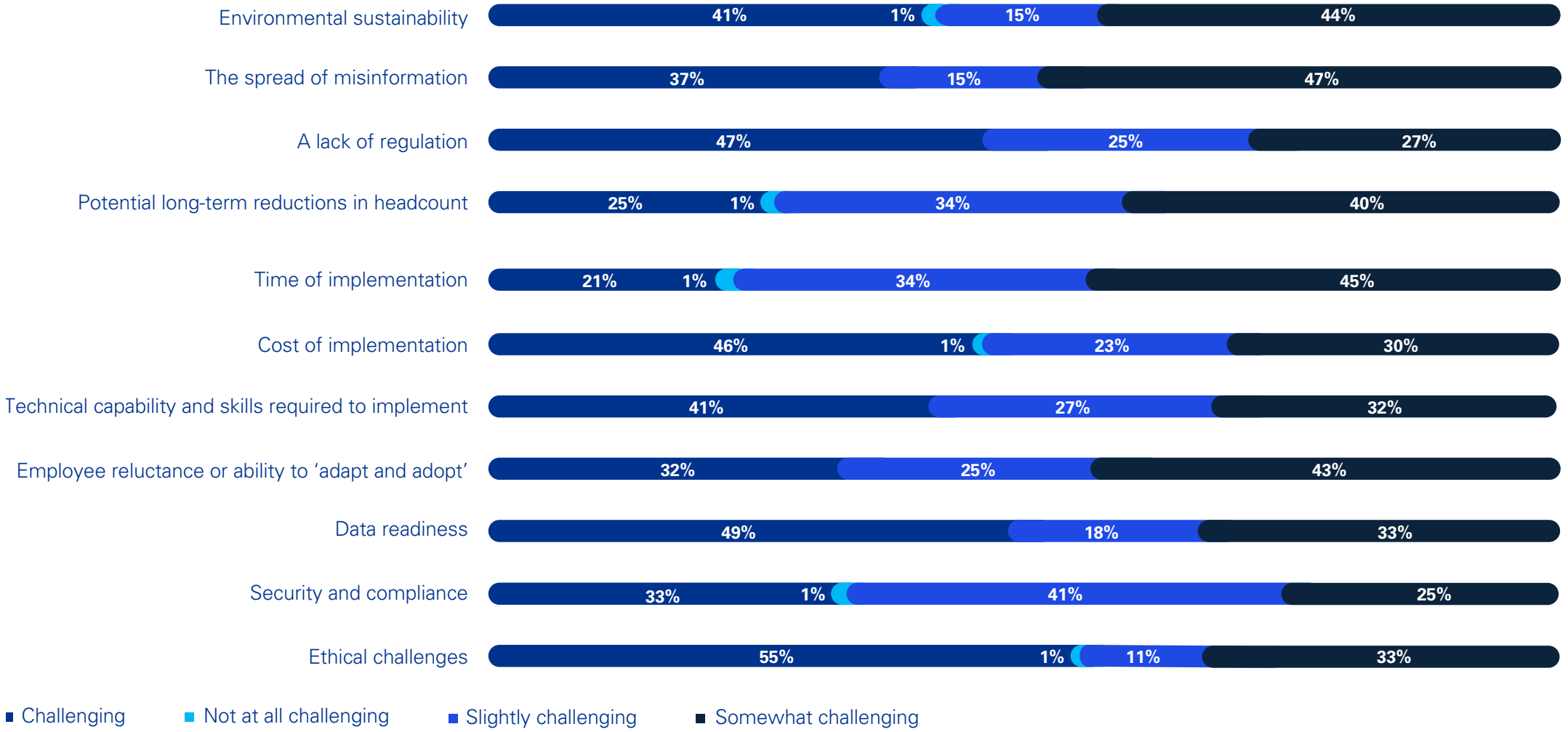
Meanwhile, the shift from GenAI to Agentic AI is accelerating digital transformation, with over half (51 percent) of ENRC CEOs expecting Agentic AI to have a significant or transformational impact, notably in operational and workforce efficiency.

Can the ENRC sector lay a robust foundation for adopting AI?

Successful AI implementation calls for AI systems that are ethically designed, supported by skilled teams, and built on reliable, secure data infrastructure. CEOs acknowledge the need to keep pace with AI: 80 percent of leaders agree their teams understand AI's disruptive potential — and 74 percent express confidence in their data readiness. Nevertheless, they also recognize barriers to AI adoption, with 55 percent of CEOs citing ethical concerns, 49 percent noting fragmented data systems, and 47 percent pointing to regulatory complexity. AI is heavily dependent upon data, but for many ENRC companies, upstream operational technology involves a large number of very small systems, which is a barrier to harmonizing data. How the sector overcomes such obstacles could determine how quickly and successfully ENRC companies reap the benefits of AI.

Top benefits of implementing AI

Challenges to AI implementation



The continuing cyber threat

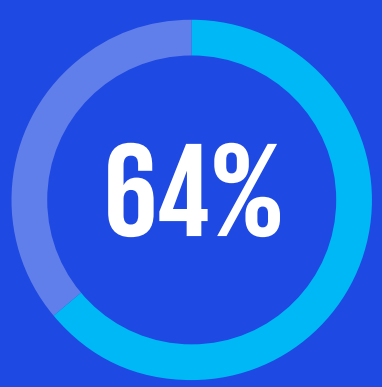
Cybersecurity and data protection remain key concerns for ENRC CEOs, with fraud (64 percent), identity theft and data privacy (59 percent), and cyber-attacks (51 percent) topping the list. Emerging threats like quantum computing, on the other hand, are recognized but not yet treated as urgent priorities.

As the energy sector becomes more globally interconnected, the attack surface for cyber threats expands, with cyberattacks originating in one country potentially impacting critical infrastructure in another.

“As a critical infrastructure sector, energy is a prime target for rogue and state-sponsored cyberattacks. ENRC companies must also navigate a complex web of national and international regulations, including legal restrictions in information sharing.”

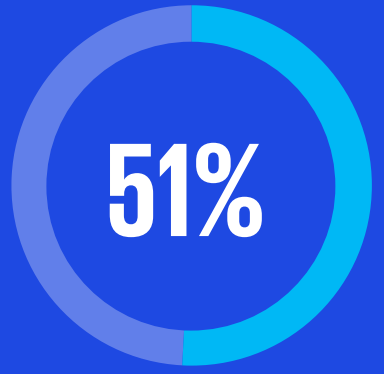
Ronald Heil
Lead of Global Cyber and Risk for ENRC
KPMG International

Top technological risks affecting cybersecurity



Fraud detection and prevention

Identity theft and data privacy



Cyber-attacks

Tuning the workforce into an AI world

Does the ENRC industry have what it takes to drive the energy transition? Companies urgently need to increase their capacity, with fast-growing demand for skills like electricians, engineers, and heat pump installers, as well as cybersecurity, data analytics, AI, and digital innovation capabilities for transmission engineering, carbon capture and hydrogen technology.

Many companies are embedding GenAI into grid operations, asset management, and customer service, as well as extraction, transport and maintenance on sites.

Consequently, ENRC CEOs are investing in their workforce to address AI disruption, with 40 percent reskilling and upskilling affected roles, 31 percent tailoring AI training to bridge generational gaps, and 30 percent redeploying employees into new roles. However, a mere 26 percent are openly communicating with employees about AI's impact on roles, and just 18 percent offer AI education across the workforce. A further 25 percent are yet to formalize workforce plans.

Despite this, there's considerable optimism about the workforce's capability to embrace AI. A large majority (80 percent) of CEOs say their organizations are ready for the impact of AI on their workforce, 77 percent feel confident in their data readiness, and 74 percent say employees have the skills to leverage AI.

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Organizational strategies to address AI-driven disruption in the ENRC sector

Re-branding the sector to enthuse a new generation

CEOs participating in this year's survey acknowledge the difficulties in building a workforce equipped to make the most of AI. The single biggest challenge (43 percent) is overcoming the skills gap, followed by competition from tech giants and other organizations offering high salaries (22 percent).

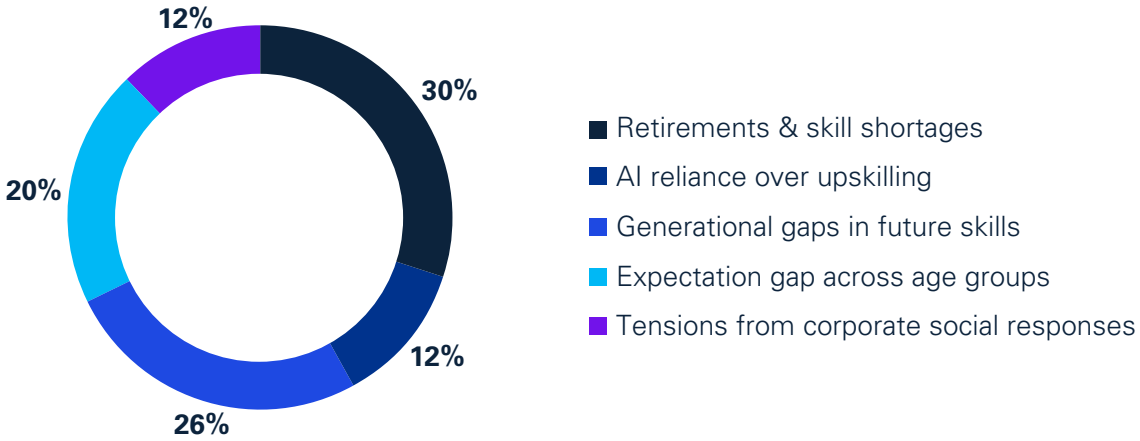
Amongst the strategies to address these challenges are retaining and re-training high-potential talent (72 percent), redesigning roles and career paths (65 percent), hiring new talent with AI and tech capabilities (64 percent), and redeploying staff into AI-enabled functions (57 percent).

Companies in the ENRC sectors are inevitably affected by broader demographic and cultural labor market trends. At the top of the list is employees retiring without suitable replacements (30 percent). Another important phenomenon is the widening expectation gaps between older and younger employees (20 percent), which has a significant influence on recruitment, career development and organizational culture.

One prominent example of this is remote working, where CEOs are equally divided between expecting a full, in-office environment and accepting a hybrid arrangement with around 3–4 days in the office.

Effective workforce planning can help companies map out and forecast future talent needs, then develop solutions to address them. For many, creating a clear roadmap of the skills required is the first step toward attracting, upskilling, and retaining the talent needed to adopt AI and drive the energy transition. Additionally, ENRC businesses may be well-placed to attract a new generation of talent by positioning the sector as offering exciting opportunities to use cutting-edge technology and combat climate change, powering the energy transition. However, with a general shortage of engineers across oil and gas, mining and metals, companies need to be innovative in their approach.

Labor-market pressures shaping workforce strategy



ENRC companies could benefit from people with a deep understanding of their business, who can look beyond silos and think across a more integrated enterprise — seeing situations from end-to-end."

Colm O'Neill
Lead of Global Power and Utilities
KPMG International

Achieving strategic advantage through ESG

To satisfy rising global energy demand, there is accelerating growth in renewables and electrification in tandem with increases in oil, gas and coal output, which, according to the Statistical Review of World Energy, is creating a multi-speed energy transition.

As emissions continue to increase, ESG remains a high priority for an asset- and energy-intensive. This helps explain why 27 percent of ENRC CEOs say climate events and broader environmental impacts are a key challenge shaping strategy — more than in any other sector in the survey. Further, 72 percent say they embed sustainability into corporate strategy. But only 38 percent fully integrate ESG into capital decisions, and more than half admit their ESG strategies are lagging behind stakeholder expectations — suggesting that leaders need an even greater focus on this pressing issue.

Additionally, 61 percent state that public debates around sustainability are distracting them from core priorities. National regimes around the world are regularly rethinking their approach to the energy transition. In response, many companies appear to be tailoring their approach to different markets, with 22 percent reassessing their targets and 25 percent localizing their ESG strategies.

As ENRC companies pursue their net zero goals, CEOs cite the single biggest obstacle as decarbonizing complex, fragmented supply chains, where it's hard to acquire reliable evidence of emissions. Another major hurdle is lack of skills and expertise in low-carbon technologies and ESG regulatory reporting. In response, CEOs say their companies are investing in supply chain resilience (40 percent), and climate and sustainability initiatives (33 percent) to manage geopolitical and climate risks.

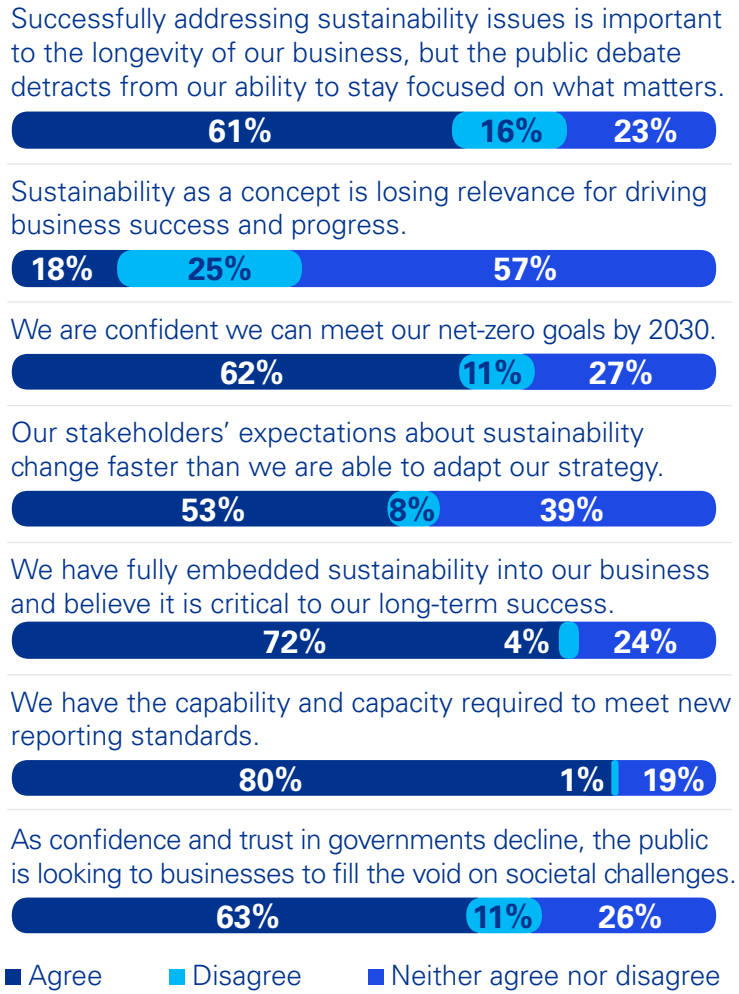
72%

say they embed sustainability into corporate strategy. But, only 38 percent fully integrate ESG into capital decisions, and more than half admit their ESG strategies are lagging behind stakeholder expectations — suggesting that leaders need an even greater focus on this pressing issue.

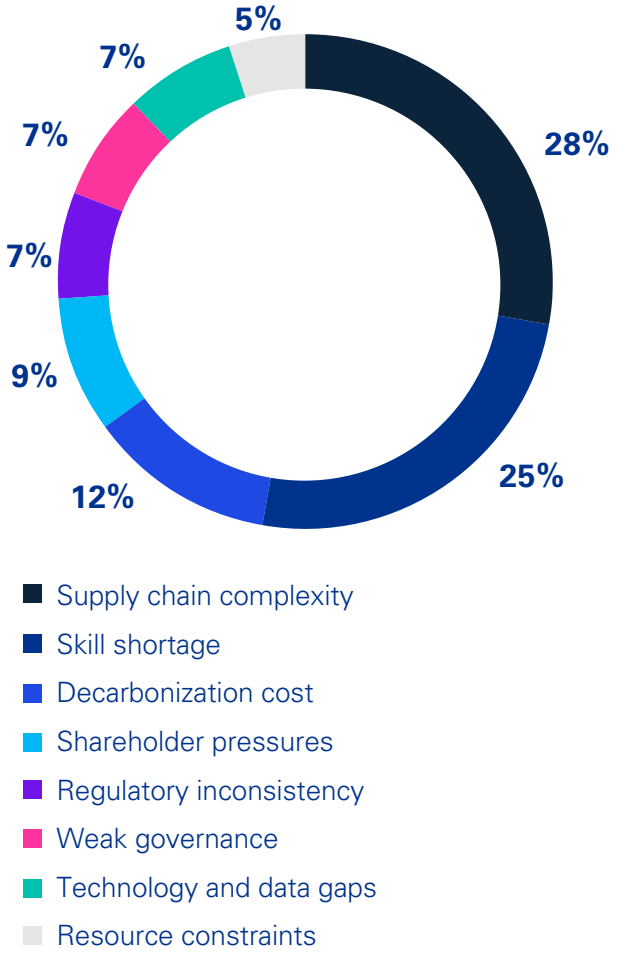
Energy and the energy transition remain absolutely critical to the sustainability and climate agenda. Access to renewable electricity, in particular to help meet fast-rising data center demand, requires significant upgrades of grids and an easing of permitting in regions like Europe to get projects off the ground. This calls for collaboration between corporates and government."

Mike Hayes
Lead of Global Climate Change, Decarbonization and Renewables
KPMG International

CEOs perspectives on ESG strategy and sustainability readiness



Top barriers to achieving net-zero goals in organizations

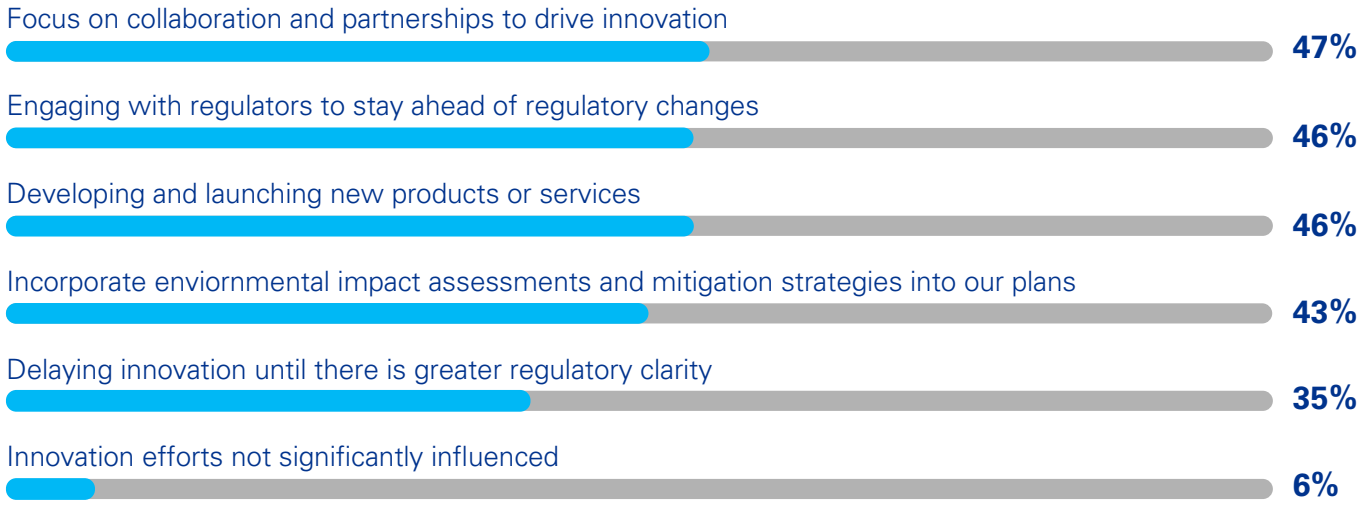


Innovation as a strategic lever for ESG

Technology is gaining traction to help ENRC companies meet their ESG goals. AI can monitor energy grids in real time, adjusting power flow to prevent overloads and blackouts. It can also automatically reroute energy or isolate affected areas quickly in case of a fault, minimizing outages. AI can also manage energy demand by incentivizing users to shift their energy usage during peak periods. More than four out of five CEOs (82 percent) believe AI can support efforts to reduce emissions and optimize energy use, and 74 percent think AI can boost their climate risk analytics, to better model future scenarios.

There is a growing recognition of the need to integrate sustainability into future operations. Forty-six percent say they're launching new products and services that directly support the energy transition, and 43 percent are embedding environmental impact assessments into innovation planning. Almost half (47 percent) of CEOs say their companies are leveraging partnerships to drive innovation.

Innovation efforts in response to the energy transition and demand for sustainable products



Getting on top of ESG reporting

Today's companies are expected to be fully transparent and accountable, with climate-related risks integrated into oversight frameworks, and regions like Europe moving toward a more flexible and principle-based ESG reporting. Consequently, 47 percent of ENRC CEOs identify ESG compliance and reporting as top priorities, with a strong focus on meeting investor expectations and aligning disclosures with emerging global frameworks. A significant majority (80 percent) believe their organizations are prepared to meet new requirements, and 44 percent point to increasing investment in regulatory compliance and reporting.

Compared to other sectors in the survey, ENRC CEOs say their companies are ahead in leveraging data to communicate sustainability outcomes (39 percent). This reflects the high environmental impact of extracting, processing and transporting energy and minerals, and the pressures on the sector to reduce emissions and protect biodiversity. Heightened scrutiny over areas such as safety, carbon footprint, indigenous heritage and water management are driving higher standards in ESG.

However, most ENRC companies aren't set up to meet such pressure with only 26 percent of CEOs 'very confident' in their ESG governance systems. Again, AI can support compliance, with 79 percent of CEOs in favor of AI enhancing sustainability-related data and disclosures.

The journey ahead

With increasing demand for energy and natural resources, how can CEOs steer their companies towards sustainable growth that meets the needs of customers, investors, and wider stakeholders?

AI-powered technological innovation

Transform grid capabilities

Smart grids have enormous potential to power the electrification that is becoming ever more vital to society, whether it's energy extraction, factories and warehouses, transportation, data centers, or cooling systems. Through better demand management and forecasting, providers can handle the growth of renewables, balance inputs and outputs, and work with business and domestic consumers to consume energy more efficiently.

Continue to harness the power of analytics

AI-driven analytics can make better decisions across the value chain, by locating deposits of oil, gas, and minerals more effectively, and accelerating predictive maintenance to optimize asset performance. In a tight margin business, analytics can help anticipate market demand and shape products accordingly, increasing production to meet customer needs both in terms of volume and specific types of energy and other resources.

Achieving strategic advantage through innovation

Collaborate to innovate

With 47 percent of CEOs acknowledging that their companies are forging strategic partnerships to drive innovation, it's evident that collaboration can reap rewards. There are many smaller players in the AI and data space that could help established ENRC organizations make breakthroughs in decarbonization.

Place a renewed focus on supply chains

Gaining greater supply chain visibility can give ENRC companies better insights on emissions, energy efficiency, and working conditions. Although this can aid regulatory reporting, more importantly, it helps to anticipate challenges and barriers, to avoid delays or shortages, and cut costs.

Tuning the workforce into an AI world

Build a compelling employee brand proposition

Given the intense competition for talent, especially in engineering and AI/technology, ENRC companies need to position themselves — and their sector — as offering exciting careers at the cutting edge of the energy transition, addressing some of the world's biggest challenges.

Get serious about upskilling

While AI may replace certain human tasks, it's essential to have a workforce that is comfortable with technology and can adapt to constant innovations. Learning and development should encompass not just technical skills, but also the ability to use insights to improve the business, and develop an enterprise-wide view.

"When it comes to AI, companies should design a suitable governance framework over how they use AI agents and data, to ensure they stay aligned with ethics and international law."

Gillian Morris
Lead of Global Chemicals
KPMG International

Methodology

The 11th edition of the KPMG CEO Outlook, conducted with 1,350 CEOs between 5 August and 10 September 2025, provides unique insight into the mindset, strategies and planning tactics of CEOs.

All respondents oversee companies with annual revenues over US$500M and a third of the companies surveyed have more than US$10B in annual revenue. The survey included CEOs from 11 key markets (Australia, Canada, China, France, Germany, India, Italy, Japan, Spain, UK and US) and 12 key industry sectors (asset management, automotive, banking, consumer and retail, energy, infrastructure, healthcare, insurance, life sciences, manufacturing, technology, and telecommunications).

NOTE: Some figures may not add up to 100 percent due to rounding.

How KPMG can help

Powering progress in Energy, Natural Resources and Chemicals

The energy and resources sectors are undergoing unprecedented change, driven by decarbonization, digital disruption, and market volatility. At KPMG, we combine deep industry knowledge with experience in tax, audit, legal, and advisory services to help organizations protect value, unlock opportunities, and navigate the energy transition.

Our global network works across oil and gas, renewables, utilities, mining, and chemicals to support clients in:

- Tax & Compliance: Navigate global regulations and tax strategies to preserve and create value.
- Audit & Assurance: Build trust with stakeholders through transparency and accountability.
- Advisory services: Transform operations, improve efficiencies, and unlock new growth opportunities.
- Legal experience: Manage risks and ensure compliance in a changing regulatory landscape.

Let us help you create, protect, and sustain value for a profitable and sustainable future.

Accolades

KPMG firms are uniquely positioned to guide businesses through this intricate landscape, leveraging the experience of over 1,500 professionals across more than 50 global hubs. Our energy professionals work closely with institutions and companies to help them understand the dynamics of energy transition, identify growth opportunities, and develop and execute strategic plans.

KPMG professionals' credibility in this space is underscored by our thorough approach, which synthesizes insights from a diverse range of stakeholders, including investors, managers, regulators, and service providers.

This multifaceted perspective enables us to assist clients in making informed decisions that help propel their businesses forward, even amidst uncertainty. With a tailored suite of services and tools, KPMG empowers clients to formulate and implement leading strategies for navigating the energy transition effectively.

KPMG is honored to be positioned as a Leader in the 2025 IDC MarketScape for Worldwide AI Services AND receive the IDC 2024 Customer Satisfaction Award for Enterprise Intelligence Services.

This study assesses the strategies and capabilities of 20 vendors who have established themselves as trusted providers across the full life cycle of AI services, with the ability to assist clients both to establish AI-fueled business plans and to transition to AI-ready technology operating models.

Contact us

Anish De
Global Head of Energy, Natural Resources, and Chemicals
KPMG International
E: anishde@kpmg.com

Colm O'Neill
Lead of Global Power and Utilities
KPMG International
E: colm.oneill@kpmg.ie

Gillian Morris
Lead of Global Chemicals
KPMG International
E: gillianmorris@kpmg.com

Jonathon Peacock
Lead of Global Oil and Gas
KPMG International
E: jonathon.peacock@kpmg.co.uk

Mike Hayes
Lead of Global Climate Change, Decarbonization and Renewables
KPMG International
E: mike.hayes@kpmg.ie

Ronald Heil
Lead of Global Cyber and Risk for ENRC
KPMG International
E: heil.ronald@kpmg.nl

Shreyansh Upadhyay
Lead of Global AI for ENRC
KPMG International
E: shreyanshu@kpmg.com

Trevor Hart
Lead of Global Mining
KPMG International
E: thart@kpmg.com.au

Your contacts in Switzerland

Grégoire Jarry

Partner, Sector Head Commodity, Audit
KPMG Switzerland
E: gregoirejarry@kpmg.com

Silvan Jurt

Partner, Sector Head Corporate Sustainability Services
KPMG Switzerland
E: sjurt@kpmg.com

kpmg.com

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