



Belgium, a world leader in chemistry, plastics and life sciences

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Managing Director

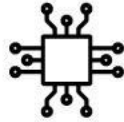
Federation of the Belgian chemical and life sciences industry



Crucial sector for many essential value chains



Engineering



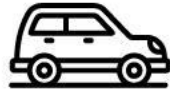
Electronics



Sport & leisure



Textile



Automotive



Medical



Aviation



Construction



Energy & water supply





01

**Belgium's chemical, plastics and life sciences
industry in a snapshot**

Belgian chemical, plastics and life sciences industry tops international rankings



World champion in chemicals and plastics (sales per capita)

Home to the largest integrated chemical cluster in Europe

European champion in the recycling of plastics and plastic packaging

Industrial pillar of Belgium's economy



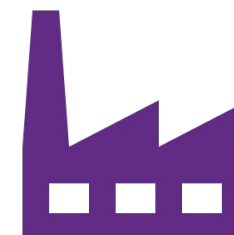
38% of added value
manufacturing industry

78% increase
in the last 10 years



1/5 of all
industry jobs

250,000
direct and indirect jobs



36% of all
industrial investments

28 billion €
investments
in past 10 years

Belgium's and Europe's R&D champion



**2/3 of all Belgian
industrial R&D**

6.8 billion EUR



World's number 1

44% share of chemistry & biopharma
in all Belgian patents



Number 1 in Europe
in terms of R&D-intensity

A global player for export of chemicals and pharmaceuticals



**1/3 of total
Belgian export**

170 billion EUR



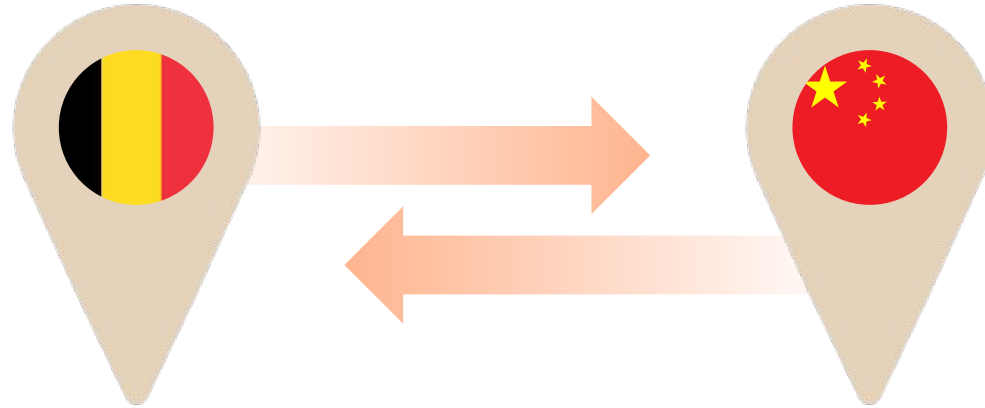
Number 3 in Europe
for export in chemistry and life sciences



Main trade partners

- Intra EU: Germany (16% of exports)
- Extra EU: USA (13% of exports)

Chemical & pharmaceutical industry represents the majority of Belgian export towards China



EXPORT

4.15 billion EUR



IMPORT

4.11 billion EUR



52%

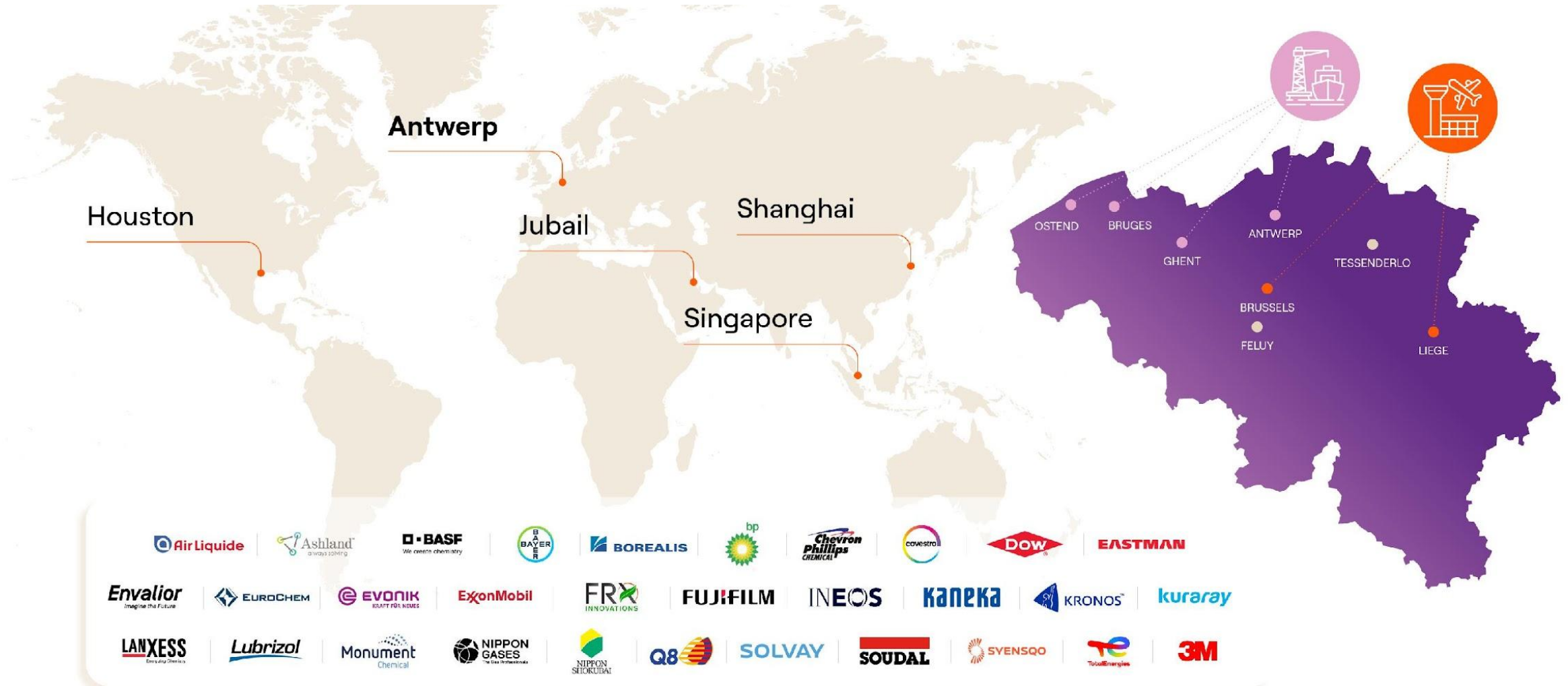
**of total Belgian exports
towards China**



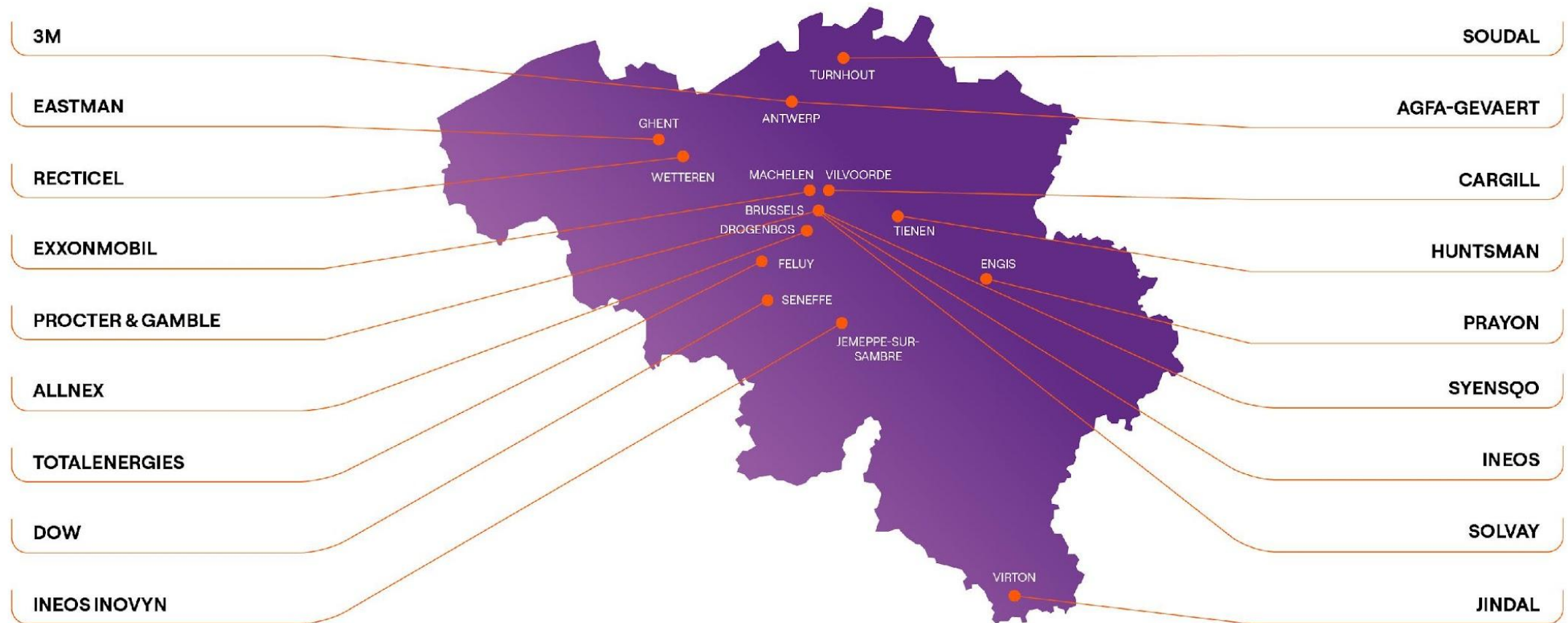
02

**Small country,
big in chemistry and life sciences**

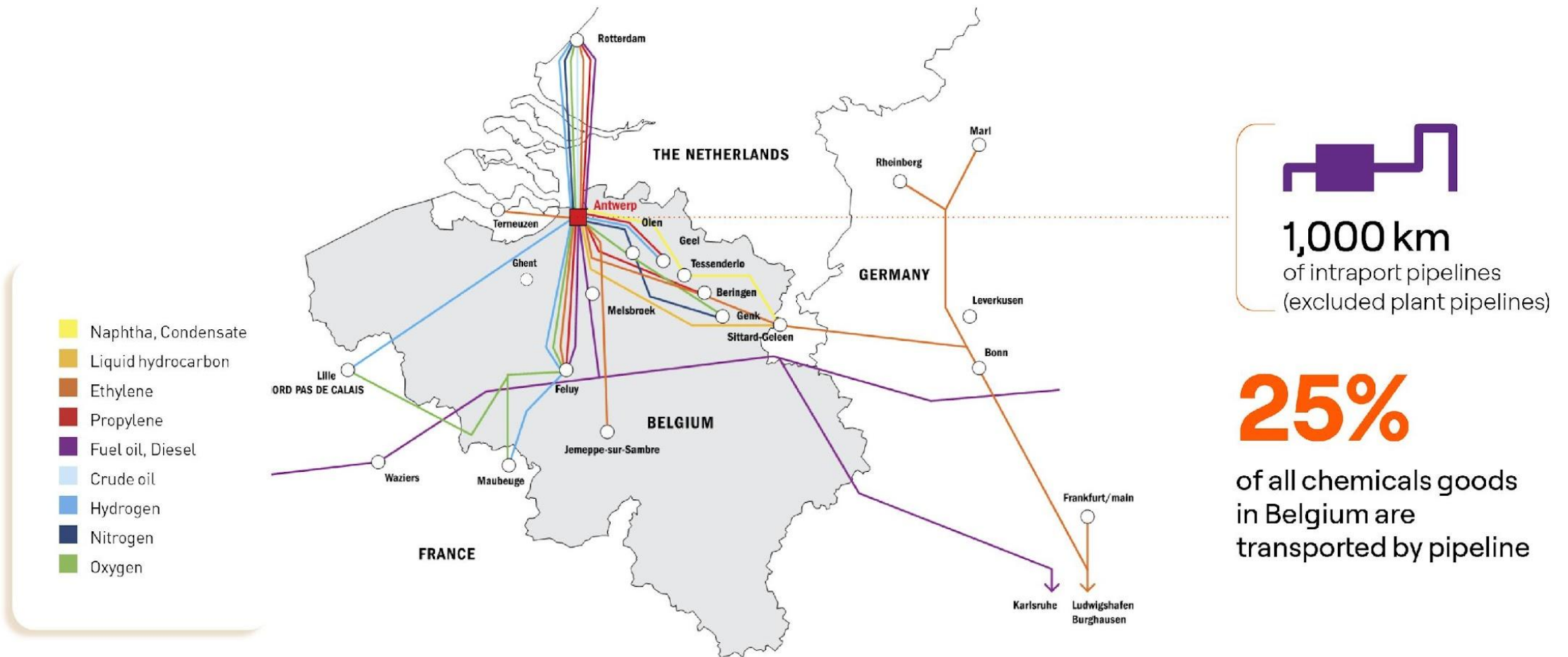
Home to the largest chemical cluster in Europe and one of the largest in the world



Leading R&D centers with a focus on sustainable chemistry, plastics and materials



Central location in the western European pipeline network



A unique life sciences ecosystem “invented and made in Belgium”



Europe's health & biotech valley



GSK – Wavre & Rixensart

Further expansion of the largest vaccines development and production center in the world



UCB – Braine l'Alleud

New cutting-edge and high-tech bioproduction plant and gene therapy facility



Legend Biotech – J&J Zwijnaarde

First production site for CAR-T cell therapy on European territory



Takeda – Lessines

A new production facility and a carbon net-zero emissions warehouse



Pfizer – Puurs

Expansion of the production and filling lines for Covid-19 vaccines



Univercells – Exothera – Braine l'Alleud

Customized manufacturing services for gene therapy and viral vector-based vaccines



Eurogentec Kaneka – Liège

GMP accreditation for new mRNA manufacturing facility



Sanofi – Geel

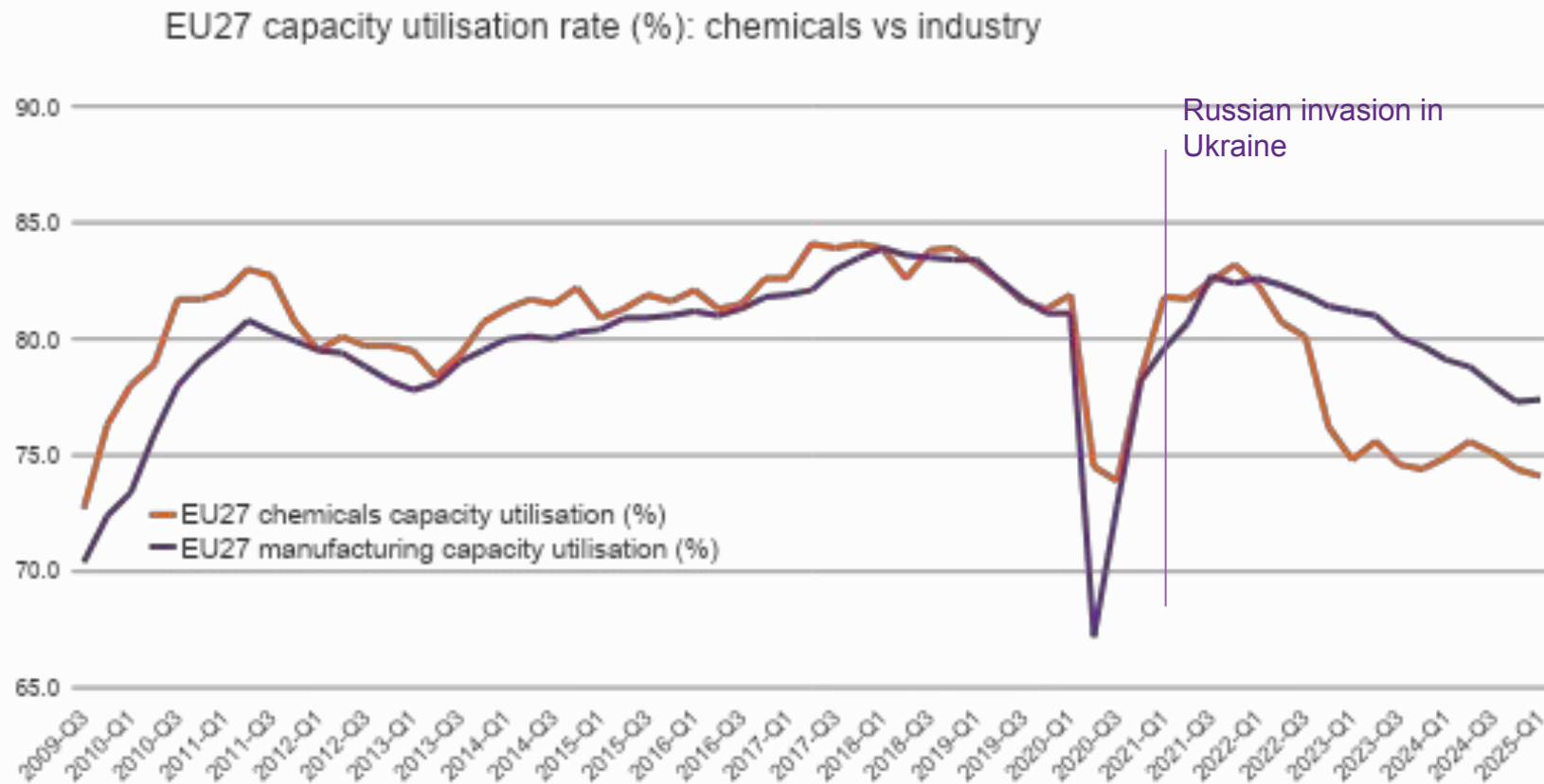
Bioplant expansion with a monoclonal antibody production line



03

Challenging economic times

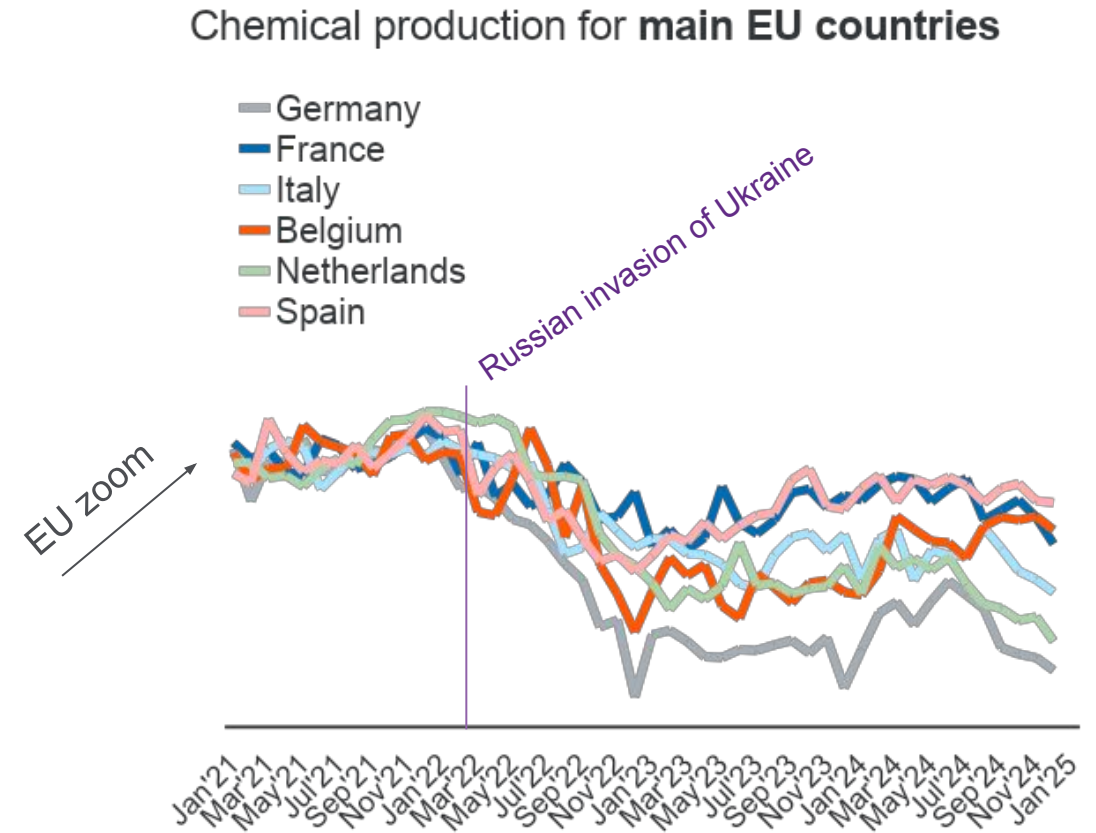
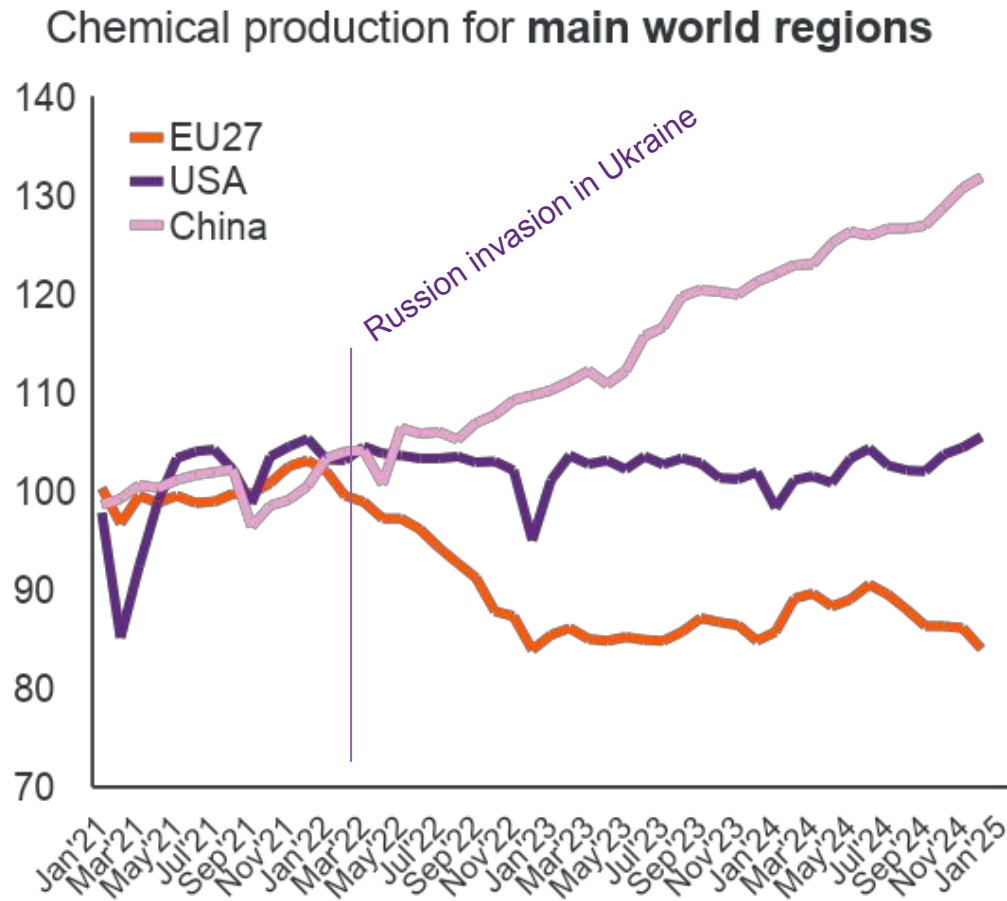
Production capacity of European manufacturing industry is running at lower levels



Source: Cefic analysis based on Eurostat

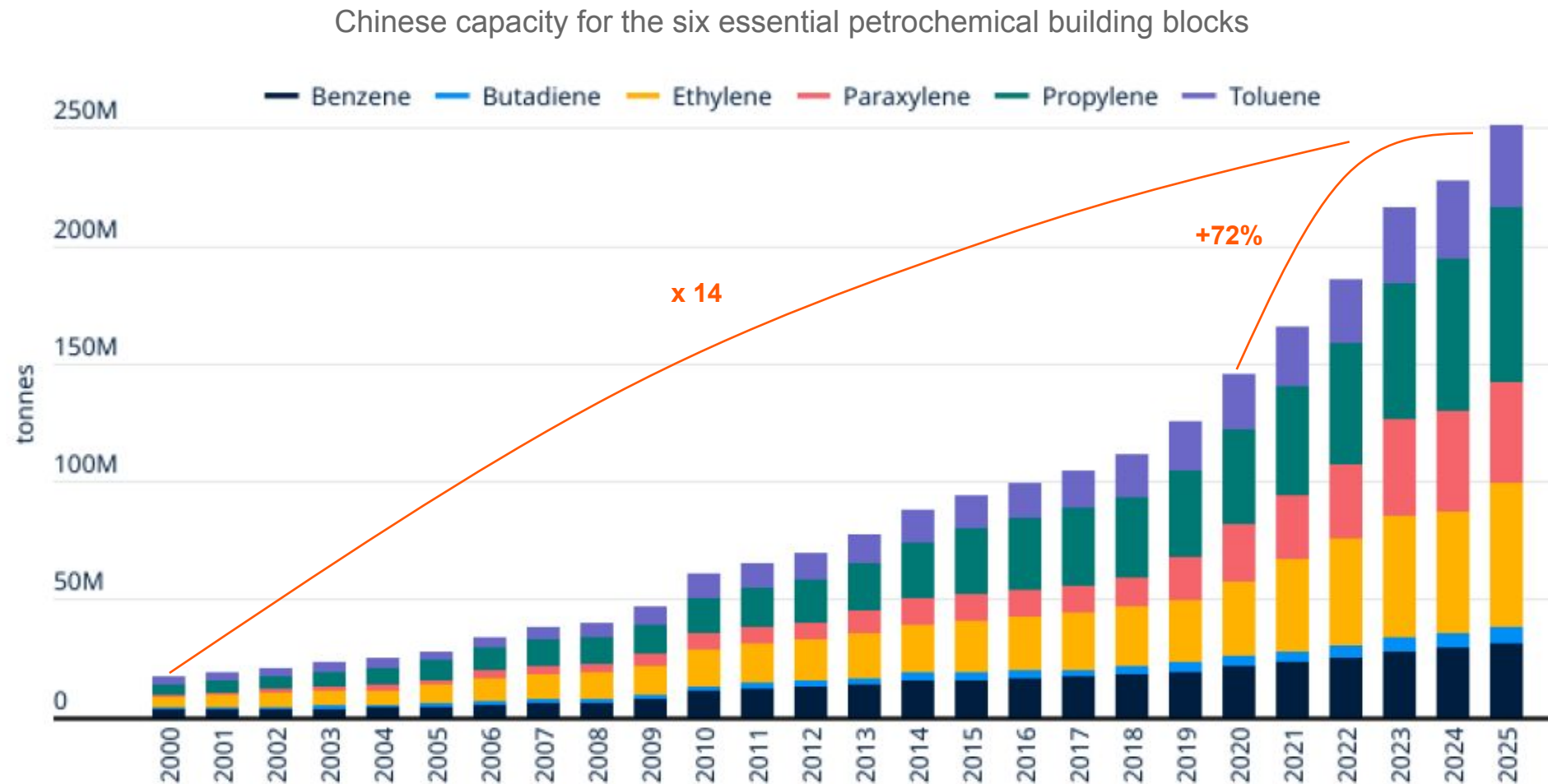
*EC, working document on sustainable products in a Circular Economy, March 2019

China remains growth engine of global chemicals production, while Europe sits at historically low level



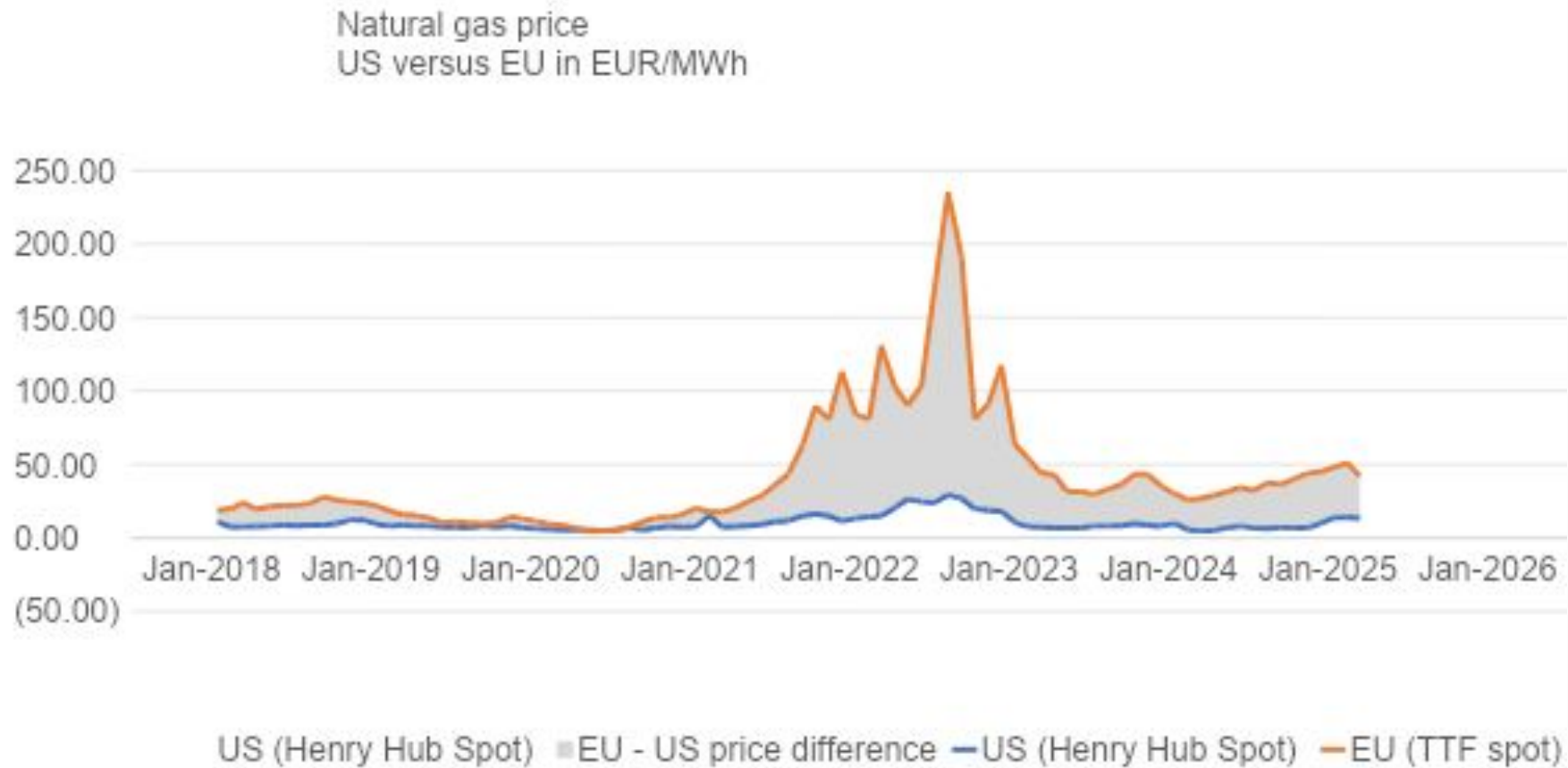
Source: Eurostat, Production index, seasonally and calendar adjusted data, NACE 20, Cefic analysis

Strong growth in Chinese chemical production capacity, negatively affects utilisation rates in other regions



Source: ICIS, 2025 Chemical Markets outlook and Supply and demand database.

Energy handicap compared to US weakens competitiveness of European chemical industry



Europe loses competitiveness due to high cost of complex regulation and administrative burden



Regulatory costs evolution in Europe

% of added value, 04-23, EU27



Sources: Cefic, UNPRI, Advancy analysis



04

An industry in transition

Sustained efforts in environmental care



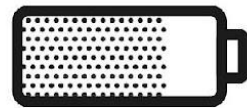
Cutting greenhouse gas emissions by half



-50% ↓

SINCE 1995

World-leading
in energy
efficiency



+75%

SINCE 1995

Sharp reduction
in drinking
water use



-22%

SINCE 2011

Pioneering CCS-project Antwerp@C



Antwerp@C

8 players in chemical & energy sector investigate feasibility of carbon capture utilisation and storage in Port of Antwerp



AMBITION

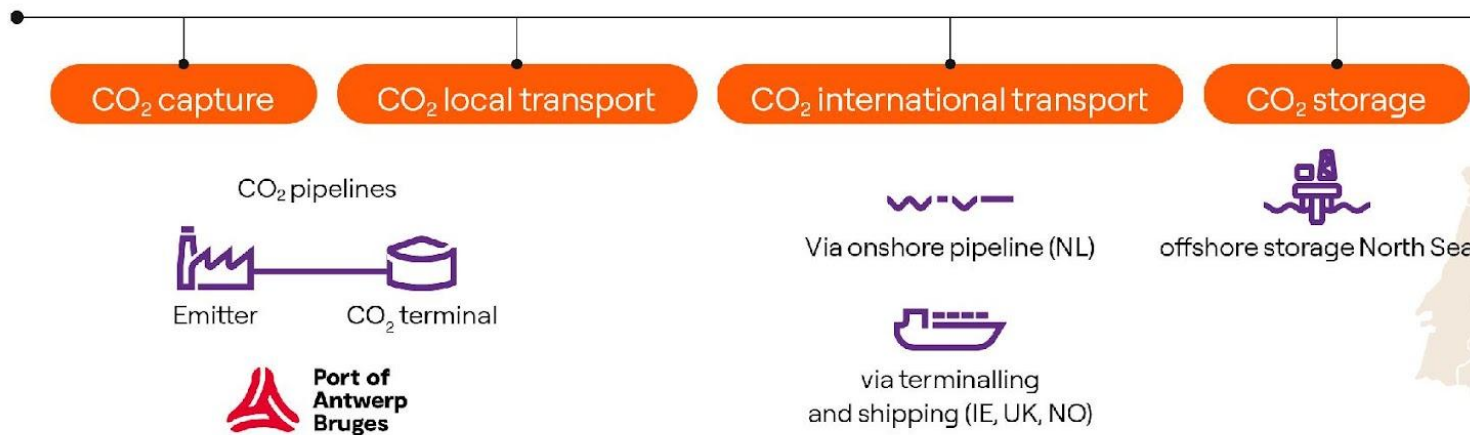
CO₂ capture

2017

18 million tons

2030

-50%



Pioneering CCS-projects at North Sea Port

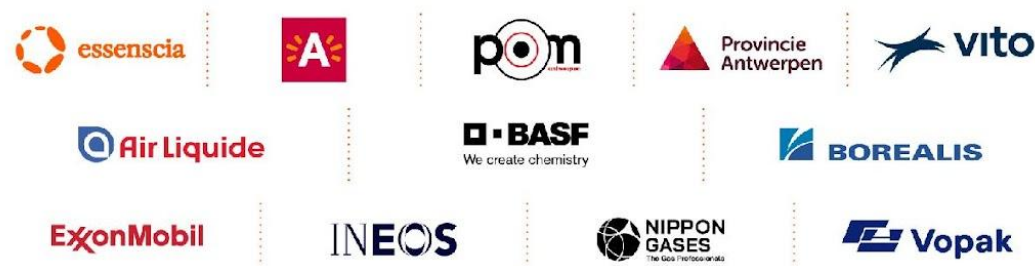


BlueChem: international hotspot for innovation in sustainable chemistry



The first incubator for sustainable chemistry in Belgium, and one of the few in Europe

- Specialized labs for start-ups and scale-ups in sustainable chemistry and circular economy
- Meeting point for open innovation and industrial upscaling together with large companies
- European hotspot for the chemistry of the future, in the heart of the Antwerp chemical cluster
- Home to spearhead cluster Catalisti and the Flemish Moonshot program
- BlueChem XL-project ongoing to double lab capacity



Innovating and investing in new technologies



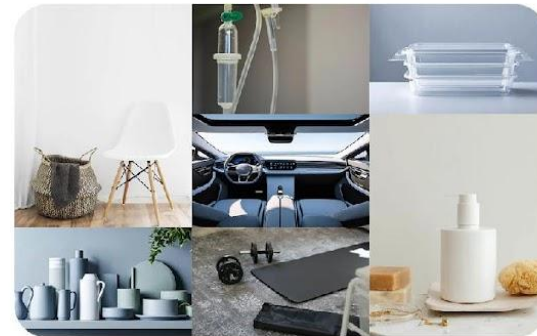
D-CRBN converts CO₂ into valuable products using plasma technology



SurePURE: pilot plant for chemical recycling of end-of-life polyurethane foams



Plastics2Chemicals: world's first chemical recycling of plastic food packaging



Vioneo plans first fossil-free plastics production complex in port of Antwerp

Industry in full transition towards climate neutrality



ECLUSE industrial steam network expansion: switch from gas to **green heat**



INEOS Project ONE: **ethane cracker** with by far the lowest carbon footprint in Europe



OMV plans refinery for the production of **sustainable aviation fuels (SAF)**



Oleon opens Europe's most innovative **bio-based chemistry** plant



Johnson&Johnson uses **geothermal heat** for its own energy needs



INEOS Inovyn installs one of the largest **solar farms** in Belgium

Energy and chemicals are key for the success of the transition towards climate neutrality



ENERGY



Carbon Capture,
Utilization & Storage
(CCUS)



Low-carbon hydrogen
as feedstock
or energy carrier



Electrification of
production processes &
low-carbon energy supply



Chemical recycling
of plastics in
a circular economy

From the Antwerp Declaration to the Clean Industrial Deal



Antwerp Declaration
20/02/2024 - BASF - Antwerp

- **Letta** report 'Single Market' (april 2024)
- **EU strategic agenda 2024-2029** (juni 2024)
- **Draghi** report 'Competitiveness' (september 2024)



Clean Industrial Deal
26/02/2025 - Handelsbeurs - Antwerp





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www.essenscia.be