



Belgium

essenscia

Number of companies

> 720

Capital spending

€2.1 billion

R&D investment

€4 billion

Turnover

€65 billion

Direct employees

90,000

National contact



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CHEMICAL INDUSTRY SNAPSHOT

At the heart of the Belgian industry

The chemical, plastics and life sciences industry is the industrial pillar of the Belgian economy accounting for nearly one third of total manufacturing value added. In 2016, the industry achieved sales of over €65 billion, and employed 90,000 workers, while supporting 150,000 related jobs.

Though Belgium, with 11 million inhabitants, has only 2% of Europe's people, its chemical, plastics and life sciences industry generates 5% of value added by the sector across the continent. On a per capita basis Belgium is the world's number one in the sales of chemicals and plastics.

Forming a global hub

Enabling all other industrial sectors, chemicals and life sciences in Belgium are a central chemical hub in a globalised world. More than 75% of employment in the Belgian industry is by foreign-based parent companies.

Export champion

Chemicals and life sciences are Belgium's top exports. 80% of the production is exported, creating a positive trade

balance. Neighbouring countries, and particularly Germany, are the main trading partners, accounting for 40% of exports. But exports to emerging countries have significantly risen.

Clustering for efficiency

Belgium hosts a world-class petrochemical cluster at the port of Antwerp, where three-quarters of the world's top chemical companies are present. Lying at the centre of the Western European pipeline network, Antwerp is directly connected with all the major sub-clusters in Belgium – the Feluy-Seneffe-Manage triangle, Jemeppe-sur-Sambre, companies along the Albert Canal, Tessenderlo, Ghent and into the Ruhr district of Germany and Delta region in the Netherlands.

Combining expertise

Life sciences are mainly clustered in Walloon-Brabant province east of Brussels near to universities, and around Antwerp. Ghent is home to a biotech valley which brings together world-class expertise in the field of medical, industrial and agricultural biotechnology. Plastic and rubber processing companies are spread across the country.

Investing in research

The sector spent €4 billion on R&D in 2016. About 60% of R&D expenditure is in-house. The balance, in the form of outsourced research, reflects close collaboration between companies and technology centres for boosting innovation. Chemicals and life sciences are the largest private investor in R&D, accounting for more than 60% of R&D spending by all manufacturing companies. During the past decade, R&D spent by the chemical and life sciences industry increased by 75% and life sciences account for more than 80% of the sector's total. However, industry spending on sustainable bio-based and green chemistry is increasing.

HOW ARE WE DOING?

Strengths

- Attractive location at the heart of industrial Europe and the Western European pipeline network
- Easy access to raw materials and export markets via three seaports: Antwerp, Ghent and Zeebrugge
- A unique integrated cluster of chemical companies covering the whole value chain
- Competitive logistical platform with tailor-made storage terminals and distribution platforms
- Highly-skilled workforce ensures world-class technical expertise for some key products
- Operational excellence and high safety standards
- World-class energy efficiency
- Strong collaboration with universities
- Unique network between companies, authorities, and customers to implement REACH and CLP
- Excellence in industrial and academic research and a unique academic and industrial collaborative network
- A wide choice of science parks with incubation and innovation centres

Weaknesses

- High energy costs due to cost pass through of public green energy strategies
- Relatively high labour costs
- Ageing workforce and quest for new talent

OUR CONTRIBUTION TO A COMPETITIVE EUROPE

Seeking a sustainable future

The government of Flanders, the Northern part of Belgium, has prioritised cluster policy and commercialisation of research, defining innovation hubs in a bid to become a leading EU region by 2020.

Catalisti, the Spearhead Cluster Chemicals & Plastics has been launched by essenscia, more than 100 companies, all Flemish universities and the Flemish government. Its mission is to accelerate the transition towards sustainability by promoting open innovation, identifying, stimulating and catalysing innovations. It focuses on renewable chemicals, putting waste and sidestream to use, intensifying processes and advancing sustainable products. To that end, the Spearhead Cluster supports small, medium and large enterprises and knowledge institutions in defining, setting up and implementing innovation projects.

In Wallonia, the southern part of Belgium, socio-economic priorities were set out in the 2005 Marshall Plan, updated as Marshall.4.0. The Walloon government's Horizon 2022 focuses on industrial policy, including sustainable chemistry. GreenWin, its sustainable chemistry cluster brings together small and large enterprises, universities, research centres, training organizations and communities. GreenWin is organised around the life cycle of materials: development of sustainable products and materials; sustainable integration and implementation of materials and treatment and making best use of waste and waste-water. Wallonia was designated the EU executive among six "model demonstrator regions" to reinforce its strategy to lead in sustainable chemical production.

A second cluster, BioWin, brings together more than 100 health biotechnology and medical technology companies.

Landscape of the European Chemical Industry Website:

<http://www.chemlandscape.cefic.org/country/belgium/>