



Netherlands

Vereniging van de Nederlandse Chemische Industrie (VNCI)

Number of companies

470

Turnover

€55 billion

Direct employees

57,000

R&D investment

€750 million

National contact



Colette Alma - Zeestraten
Director General
alma@vnci.nl

CHEMICAL INDUSTRY SNAPSHOT

A strong industry at a gateway to Europe

The Netherlands has Europe's fourth-largest chemicals industry. The combination of Rotterdam harbour, good infrastructure, top universities and qualified personnel has attracted many of the world's largest chemical companies.

A leading employer

Chemicals turnover in 2017 was €55 billion, including €5 billion from pharmaceuticals. Our industry employs 57,000 people, including 13,000 in the pharmaceutical industry, in more than 470 companies. It's the second-largest industry in the Netherlands.

In the global vanguard

In basic chemistry, biotechnology, food ingredients, coatings and high performance materials, the Netherlands is

among the world's top players. The chemical industry provides more than 15% of the Netherlands exports, outpacing export volumes from Japan.

Driven by innovation

Our chemical industry is a leading innovator, investing €750 million a year in research and development, a fifth of national industrial R&D.

Networked with neighbours

The combination of Rotterdam harbour and pipelines to nearby chemical production centres in Belgium, Germany and northern France ensures the Netherlands industry forms part of a strong cluster in Northwest Europe.

Clustering in the regions

The Netherlands is relatively small and manageable country with outstanding roads, rail links, waterways, telecommunications, and energy supply pipeline networks linking production regions.

The main clusters are:

Rotterdam/Botlek/Pernis/Moerdijk

Rotterdam focuses on basic chemicals and petrochemicals. Looking ahead, the port of Rotterdam aims to integrate its petrochemical complex with those of Antwerp, Moerdijk, Terneuzen and Vlissingen to create a single large global leader connected closely with those in Germany.

South Limburg/Chemelot

South Limburg is a centre for life sciences and materials, supported by the University of Maastricht.

Delfzijl/Eemshaven and the eastern Netherlands/Twente

There are 160 companies here spanning energy, recycling, chemicals, metals and logistics.

HOW ARE WE DOING

Strengths

- A key part of Europe's biggest cross-border chemical cluster
- Well-educated labour force
- Stable political and social climate
- Served by the port of Rotterdam
- Rising productivity has reduced unit labour costs

Weaknesses

- Relatively high energy costs - being tackled by a collaboration between all involved to achieve an affordable and clean energy supply
- An ageing workforce- tackled by public-private skills planning

OUR CONTRIBUTION TO A COMPETITIVE EUROPE

Building research capacity

Education, science, knowledge institutes and industry are collaborating on research to accelerate innovation.

Opportunities for growth

A 2012 study sponsored by VNCI predicted substantial sector growth.

The chemical industry is expected to transform through more efficient use of raw materials, a shift from fossil inputs biomass, bio waste and other resources. Free trade, improved energy efficiency, raw material diversification, focused R&D, sustainable innovation and facilitating legislation are needed to help achieve this goal.

Supported by government policies

The chemical industry is among those in which the Netherlands achieves world class excellence, and benefits from supportive government policies.

Landscape of the European Chemical Industry Website:

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