### Netherlands

**Koninklijke Vereniging van de Nederlandse Chemische Industrie (VNCI)**

<table>
<thead>
<tr>
<th>Number of companies</th>
<th>Turnover</th>
<th>National contact</th>
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<tr>
<td>470</td>
<td>€55 billion</td>
<td>Manon Bloemer</td>
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<td>Director General</td>
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<td><a href="mailto:bloemer@vnci.nl">bloemer@vnci.nl</a></td>
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**Direct employees**

57,000

**R&D investment**

€750 million

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### 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/