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Overheden en economisch inrichtingenbeleid in België

Visie en verwachtingen van de industrie

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Gedelegeerd bestuurder essenscia

Brussel, 2 mei 2012



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À propos de essenscia

- Une fédération qui rassemble :
 - ✓ 3 sections régionales
 - ✓ 16 secteurs d'activités
 - ✓ 780 membres
- Un réseau et des partenaires : FEB, UWE, Voka, BECI, Cefic, Business Europe, AWEX, FIT, Brussels Invest & Export, BioWin, FlandersBio, CFDD, universités et hautes écoles, Cefochim, Certech, GreenWin, FISCH, ...
- Mission Statement : **"Improving everyone's quality of life"**

*"The world is facing important challenges in the use of **energy**, **natural resources**, and the provision of **food**, **water** and **health** for its population. Chemistry, Materials and Life Sciences are essential to making the world's development sustainable. Our innovative research is crucial to the development of new products, applications and services. Our industry is central to a successful future and to improving everyone's quality of life."*



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Kerncijfers chemie, kunststoffen en life sciences in 2011



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- Omzet 58,1 miljard € + 11%
- Directe jobs 90.300 jobs + 1.000 jobs
- Investerings 1,82 miljard € + 37%
- O&O-uitgaven 2,72 miljard € + 11%
- Uitvoer 109 miljard €
- Handelsoverschot 25,8 miljard €



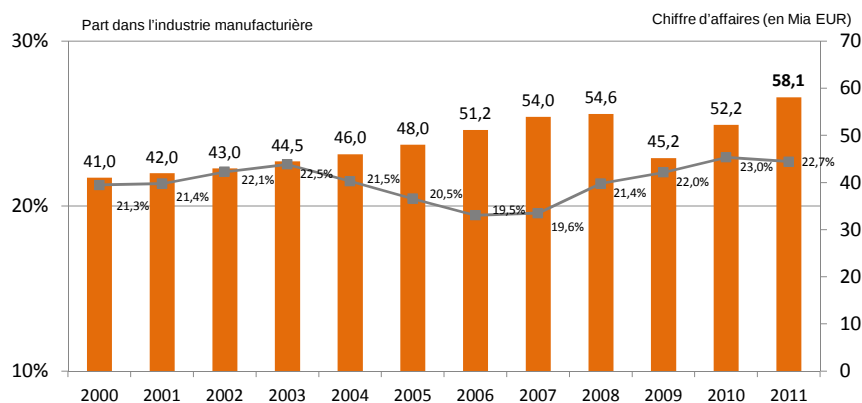
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Chiffre d'affaires



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- **Augmentation de 11%** du chiffre d'affaires à un nouveau record en 2011
- Pratiquement la moitié de la hausse est due à l'augmentation des volumes



Source: DGSIE selon les déclarations à la TVA et Procom
Nace-Bel 2003 : 24+25 (industrie chimique et des sciences de la vie, y compris la transformation des plastiques et du caoutchouc)
Chiffres provisoires pour 2011



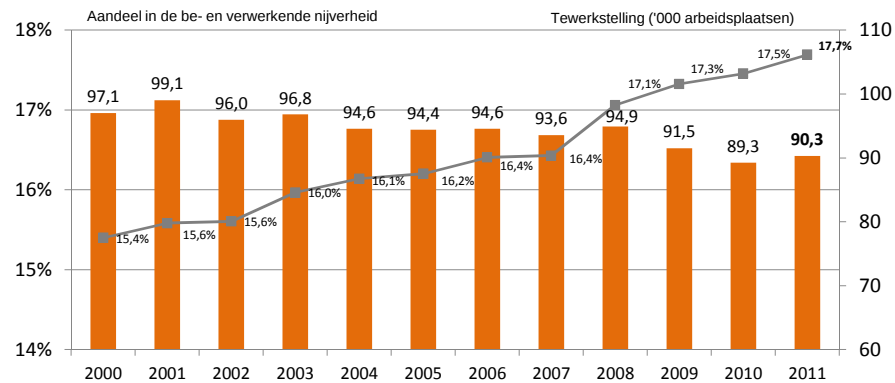
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Tewerkstelling



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- Tewerkstelling stijgt met **1.000 jobs**
- Belang van de sector in de industriële tewerkstelling neemt continu toe



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Tewerkstelling op 30 juni van elk jaar

Bron: RSZ – gedecentraliseerde statistieken. Nieuwe NACE Rev. 2 sinds 2008
2011: raming op basis van de gecentraliseerde statistieken (Nace-Bel 2008)

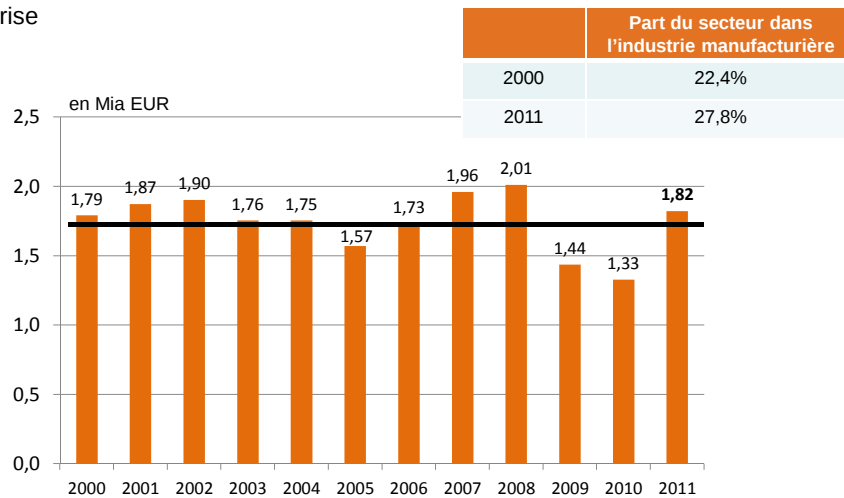
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Investissements en assets



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Retour des investissements à leur niveau tendanciel après un recul pendant la crise



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Source: INS suivant les déclarations à la TVA – Chiffres provisoires pour 2011

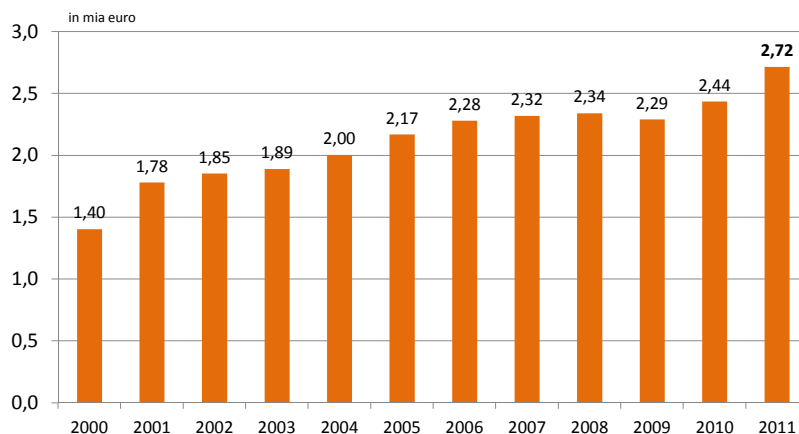
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O&O-uitgaven



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Toename O&O-uitgaven met 11% in 2011 leidt tot **nieuw record** in innovatie-investeringen. Dit is meer dan de helft van de industriële O&O-uitgaven.



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Bron: essenscia – enquête bij de leden
Voorlopige cijfers 2011

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Exportations



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La chimie, les plastiques et les sciences de la vie demeurent **le premier produit à l'exportation**, avec une part de 31,8% dans le total des exportations de biens

		Exportations 2011 (en Mia EUR)	Part dans le total des exportations de biens
109 Mia EUR	Chimie et sciences de la vie	80,3	23,4%
	Produits minéraux	39,3	11,4%
	Machines, appareils	38,1	11,1%
	Transport	32,6	9,5%
	Métaux	30,4	8,8%
	Plastiques et caoutchouc	28,7	8,4%
	Perles, pierres précieuses	18,6	5,4%
	Alimentation	14,9	4,3%
	Textile	11,6	3,4%
	Autres	48,8	14,3%

Source: BNB/ICN

Selon le concept communautaire: y inclus toutes les activités de transit et les centres de distribution internationaux
Chiffres provisoires pour 2011

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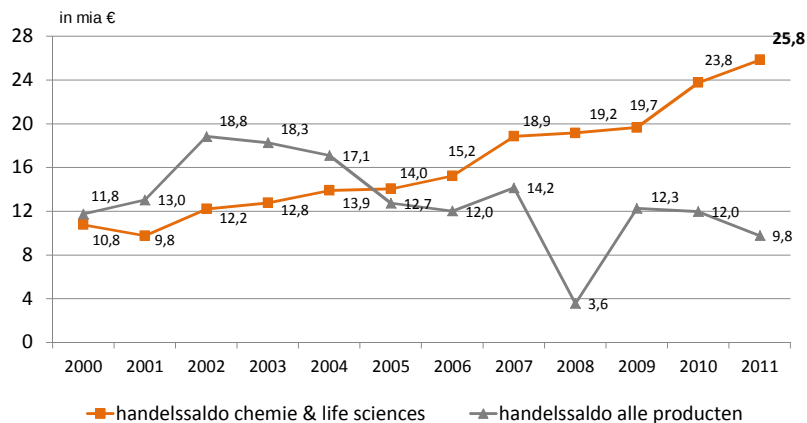
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Handelsbalans



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- Handelsoverschot blijft toenemen en bereikt **hoogste niveau**
- Sector levert cruciale bijdrage aan de welvaart in België



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Bron : NBB/INR

Chemie en life sciences : GN hoofdstuk 28-40

Volgens het communautaire concept : inclusief alle doorvoeractiviteiten en internationale distributiecentra

Voorlopige cijfers 2011

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Belgium,
a world champion
for chemicals and plastics



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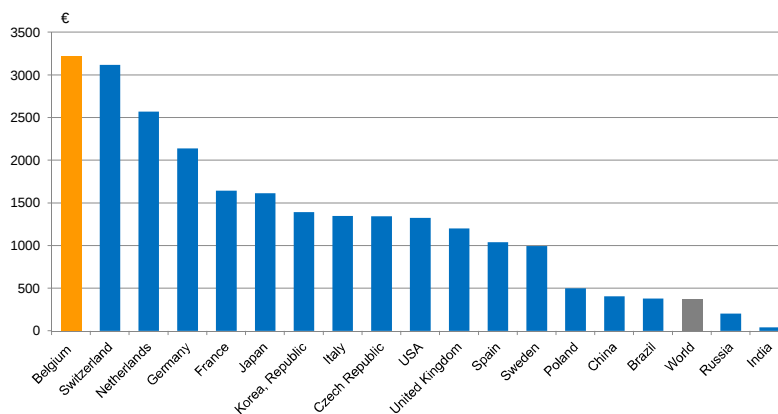


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Belgium is the n°1 chemical country in the world on a per capita basis



Sales of chemicals and plastics per capita (2009)



Source: Feri, NIS
2009 Figures



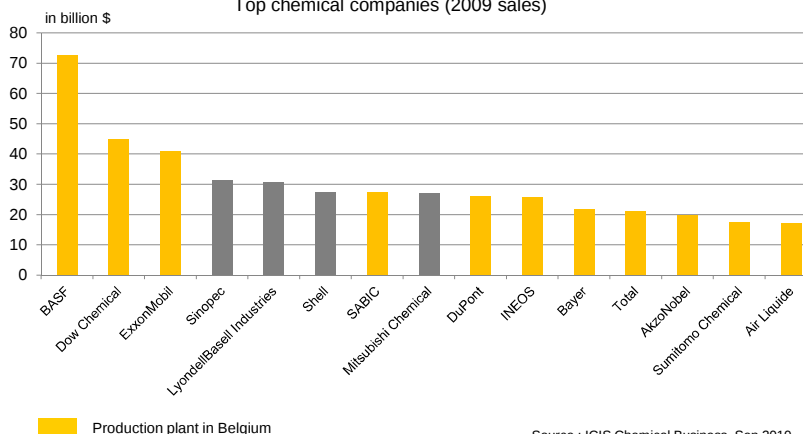
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75% of the world's top chemical companies have chosen to invest in Belgium



11 of the top 15 chemical companies have production sites in Belgium

Top chemical companies (2009 sales)



Production plant in Belgium

Source : ICIS Chemical Business, Sep 2010



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Why is Belgium so attractive for this industry?

The reasons



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First class availability of raw materials thanks to 3 major seaports



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Cargo handling – Top 10 Ports Northern Europe

Ranking	Port	Country	2008 (mio metric tons)
1	Rotterdam	NL	420
2	Antwerp	B	189
3	Hamburg	D	143
4	Amsterdam	NL	96
5	Le Havre	F	81
6	Bremen	D	76
7	Duinkerken	F	58
8	London	UK	43
9	Zeebrugge	B	43
10	Ghent	B	28

Source: Flanders Port Area

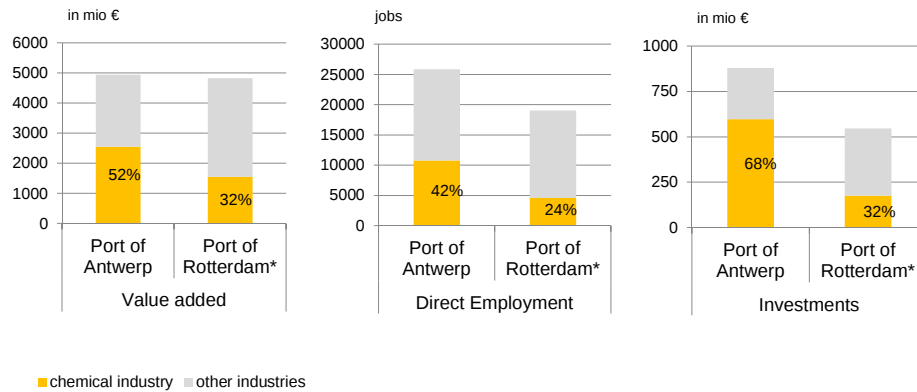


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The port of Antwerp hosts the largest chemical industry in Europe



The industry within the ports of Antwerp and Rotterdam



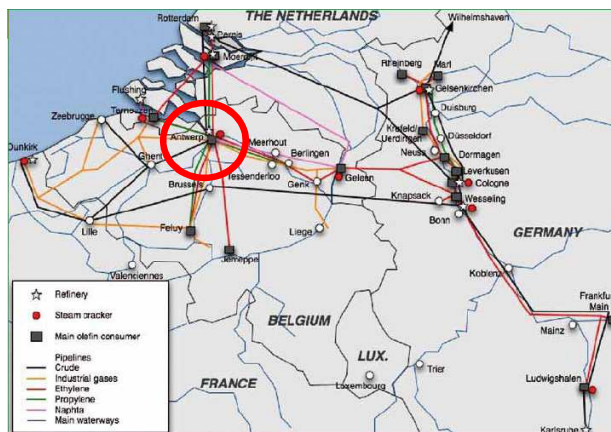
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Source: National Bank of Belgium, Buck Consultants International; 2007 figures, 2006 for investments; * Rotterdam-Rijnmond

First class availability of raw materials thanks to the central location in the Western European pipeline network



Pipelines offer a fast, efficient, cheap and ecological supply chain



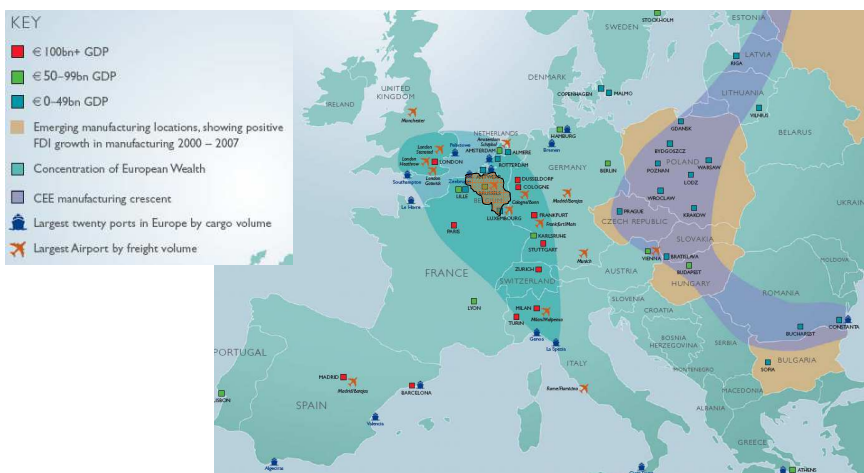
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Source: EPCA, Results of the Think Tank Sessions, August 2007

Belgium offers access to 80% of the European purchasing power within a 500 miles radius



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Source: European Distribution Report, Cushman & Wakefield, 2008

The Belgian logistics platform offers a competitive differentiator for the chemical industry



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Considering costs, transport system, accessibility, supply, labour and know-how

Ranking*	2002	2004	2006	2008
Belgium	1	1	1	1
The Netherlands	2	4	3	2
Hungary	9	9	7	3
Czech Republic	5	5	4	4
Poland	7	6	5	5
France	4	2	2	6
Austria	8	7	9	7
Germany	3	3	6	8



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Source: European Distribution Report, Cushman & Wakefield, 2008

Storage terminals and distribution platforms at the service of the chemical industry in Belgium



- Tailor-made global logistics solutions for chemicals
- Logistical operators have built up considerable know-how in serving the chemicals industry.

Production Support Platforms



Gateway platforms



Distribution platforms



On-site terminals



Source: Katoen Natie



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Further investments in logistics infrastructure will secure our pole position



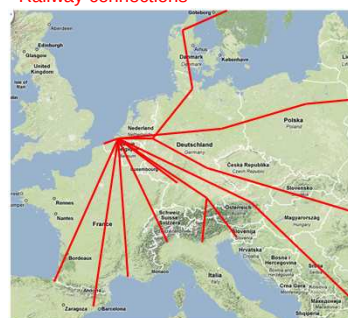
The “Combinant” project

- JV BASF Antwerp – Hupac – IFB
- New multimodal terminal (road-rail)
- Open for third parties
- Investment of 29 million euro
- With support from the Flemish Government and the European Fund for Regional Development

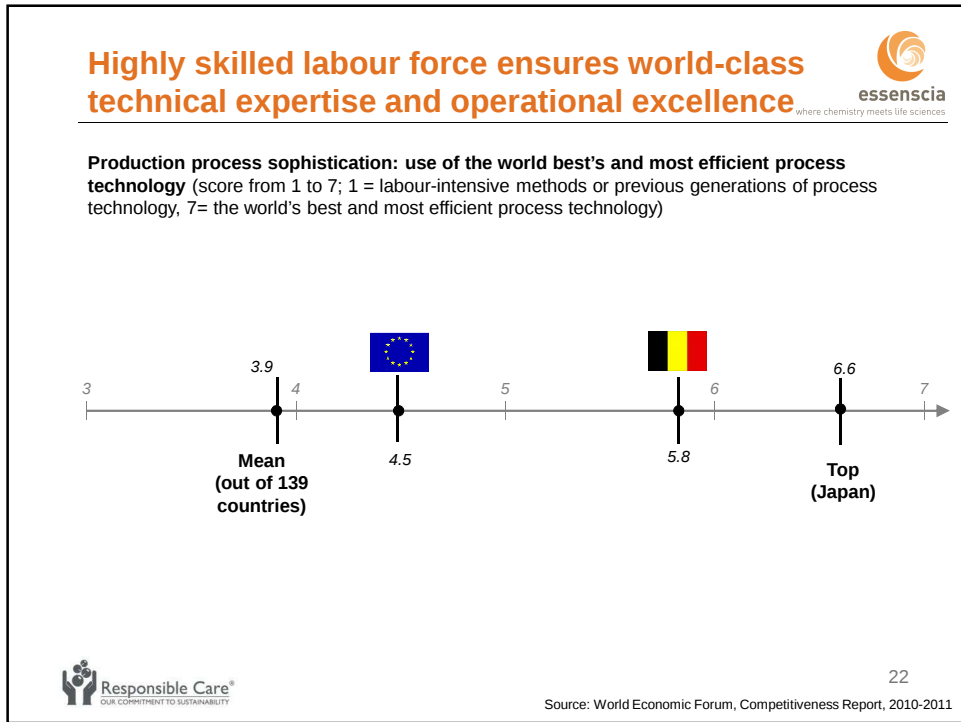
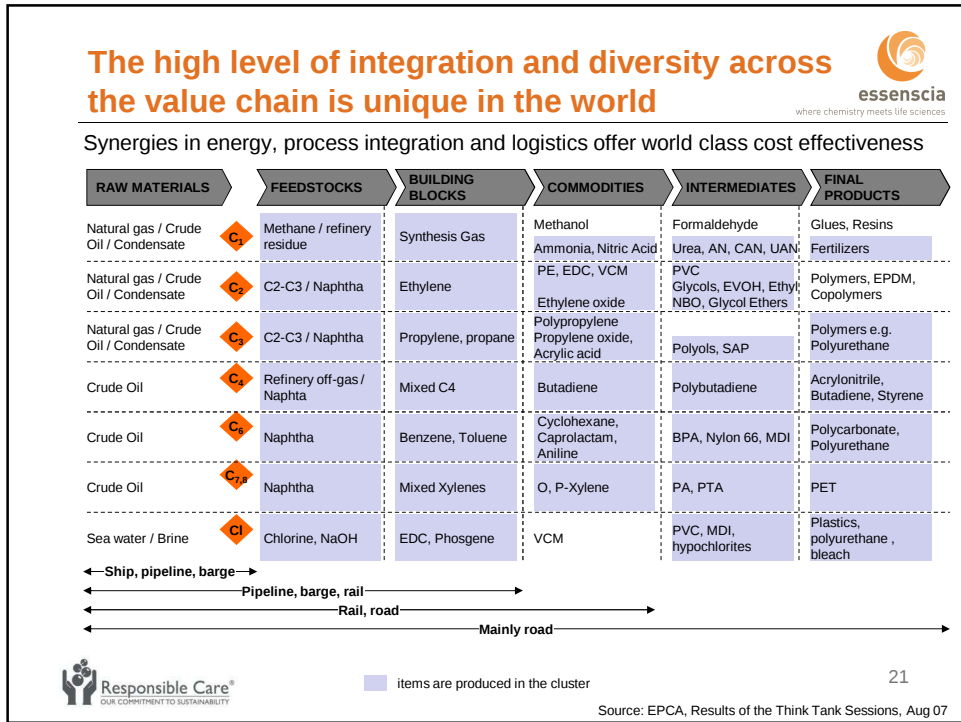
Objectives

- Avoid impending congestion on the road
- Daily saving 10 km traffic jam
- 150,000 containers transfers from road to rail yearly
- Yearly reduction of as much as 30000 t/CO₂ emissions
- Operational since March 2010

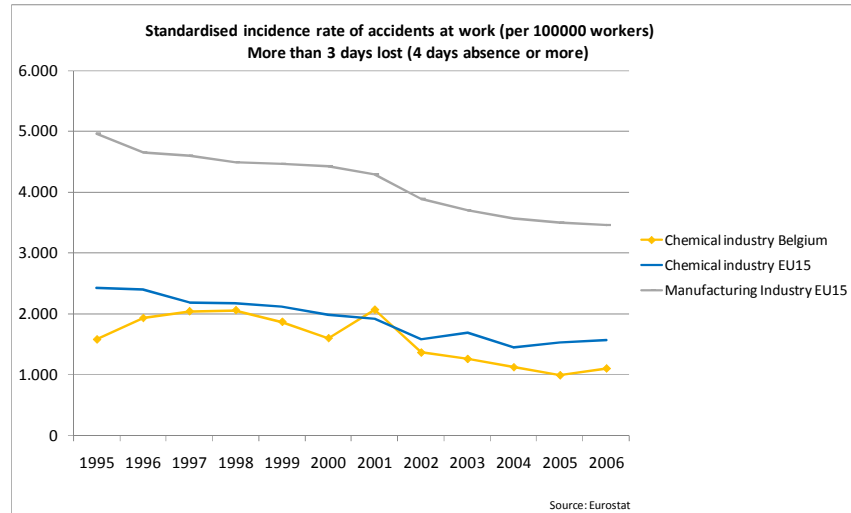
Railway connections



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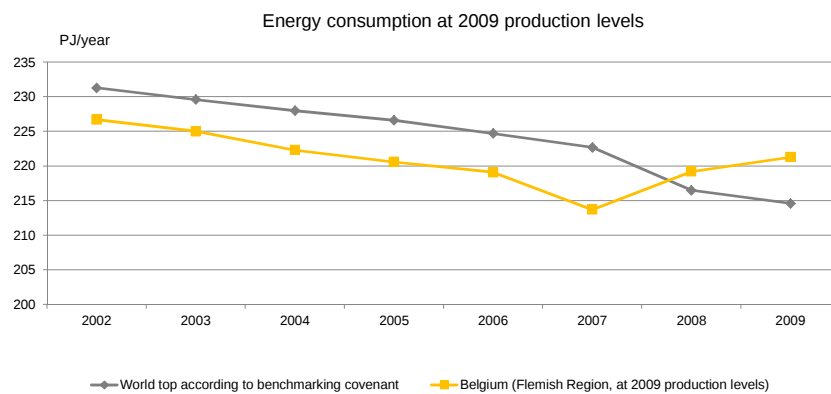


Operational excellence also leads to high safety at work



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Operational excellence delivers world-class energy efficiency



Source: Commissie Benchmarking Vlaanderen (jaarverslag 2009)

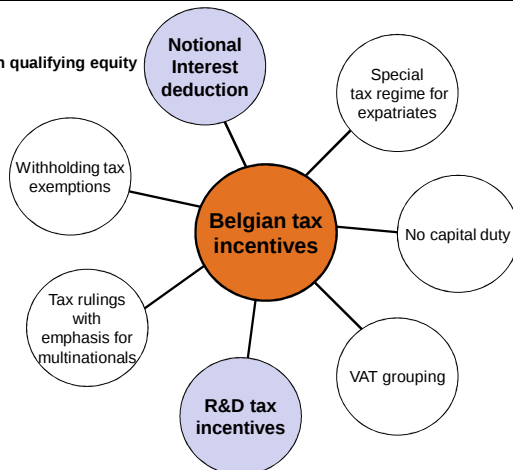


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Attractive tax incentives increase financial returns on capital intensive and R&D investments



✓ Tax-free return on qualifying equity



- ✓ 80% patent income reduction (maximum tax is 6.8%, lowest in the EU)
- ✓ 75% exemption payroll withholding tax for scientific researchers
- ✓ Refundable R&D tax credit system
- ✓ Increased investment deduction and flexible depreciation rules for R&D



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The authorities in Europe and in Belgium actively support the chemical industry



At regional level (Flanders)

- Round table on chemical industry by the Flemish Minister of Economy (started in 2005)
 - Recognition of the chemical industry as a strategic sector in Belgium
 - focus: innovation, competitiveness, infrastructure & logistics and social acceptance of the industry
 - 12 action points



At European level

- High Level Group on Chemicals initiated by the European Commission (2007-2009)
 - 22 recommendations



At Belgian level

- High Level Group for a sustainable chemical and plastics industry in Belgium initiated by the Federal Minister of Economy (2009-2010)



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Belgium is building a future of sustainable chemistry



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Belgian Technology Platform For
SUSTAINABLE CHEMISTRY



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SusChem Belgium, katalysator voor duurzame chemie



Competentiepool voor duurzame chemie in Vlaanderen operationeel sinds januari 2012

7 innovatieprogramma's:

- Microalgen
- Valorisatie van afval- en nevenstromen
- Scheidingstechnologie
- Microprocesstechnologie
- Hernieuwbare chemicaliën
- Recyclage van polymeren
- Meetinstrumenten duurzaamheid (Eco2Chem)

Startbudget 2012: 5 miljoen € gefinancierd door de Vlaamse overheid, ondernemingen en essenscia



6^{ème} pôle de compétence du plan Marshall de la Wallonie, lancé en février 2011

3 axes d'innovation:

- Développement de produits, matériaux et procédés durables
- Intégration et implémentation de matériaux durables, p.ex. dans la construction
- Gestion de matériaux en fin de vie, recyclage et valorisation de déchets

Déjà 15 projets de recherche et d'éducation approuvés via 2 appels à projet
Budget actuel: 40 millions € cofinancés par les autorités wallonnes et des entreprises

Industry consolidation will reinforce the role of the Belgian chemical clusters



- Europe is facing challenges: centre of gravity **shifting toward** Asia & ME
- Industry will **readjust through further consolidation**, process integration and **innovation**
- The Belgian clusters generate smarter operations throughout the value chain
 - maximization of synergies (energy, services, utilities)
 - skilled workforce
 - focus on sustainable chemistry



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Onze verwachtingen van het economisch inlichtingenbeleid



Clusterbeleid is van strategisch belang voor succes van chemie in België

Hoe kan het inlichtingenbeleid dit belangrijk economisch potentieel in ons land vrijwaren?

- Nood aan accurate informatie in een vroeg stadium over strategische ontwikkelingen van andere chemieclusters in de wereld, bv. VS, Singapore, China, India, Midden-Oosten, ...)
- Samenwerking tussen inlichtingendiensten en Belgisch diplomatiek netwerk in het buitenland



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Belgian Federation for Chemistry and Life Sciences Industries

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