Cefic review 2007 - 2008

The European chemical industry
A global leader in innovation, supporting growth and well-being in Europe

cefic

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Cefic review 2007 - 2008

Message from the President and the Director General

Europe's innovation potential and well-being relies on a competitive chemical industry.

Alain Perroy
Director General

François Cornélis
President

Europe is at a crossroads.
It can either allow a world-leading industry to continue flourishing and to support growth, jobs, innovation and well-being. Or it can gradually undermine this industry's competitive edge with serious consequences for the European economy and society.

Much of Europe's prosperity is fuelled by products made and new applications invented by the chemical sector. It is a fair assumption that Europe won't grow without a strong chemical industry.

The chemical industry helps to invent the solutions we need to major world challenges: climate change, low-carbon and renewable energy, clean water and healthy, affordable housing. Europe couldn't play a significant role in meeting these challenges without a competitive chemical industry.

This is because most innovations in chemistry find their way into so many other products and applications. To take only one example, advances in fuel cell technology – which has the potential to improve environmental performance of cars – rely on the innovation currently taking place in the European chemical sector.

The European chemical industry shows the way forward to address sustainability challenges: it has drastically cut its CO_2 emissions; it is Europe's No. 1 contributor to the Kyoto objectives; and it is well prepared for and committed to make REACH a success to further improve chemical safety.

For all these reasons, European decision-makers have a duty to ensure that this industry remains competitive and that it reaches its full innovation potential.

Chemistry made in Europe
Innovative and responsible: a look at the facts.

Created in Europe 200 years ago, the science of modern chemistry gave birth to a vibrant, world-leading industry that has transformed everyday life in Europe and in much of the rest of the world.

The chemical industry has proven a formidable force for the economic prosperity and quality of life enjoyed by Europe's citizens.

The chemical industry and the innovation it fosters are a powerful catalyst for change and progress in virtually every domain of human activity, in areas as varied as medicine, furniture design, agriculture, manufacturing and travel – to name but a few.

Innovation in the chemical industry has a unique ability to shape advances in a myriad of everyday products and services. The solutions and technologies we aspire to in order to transition to a less carbon-dependent society, likewise, depend on advances in chemistry and on existing chemical products.

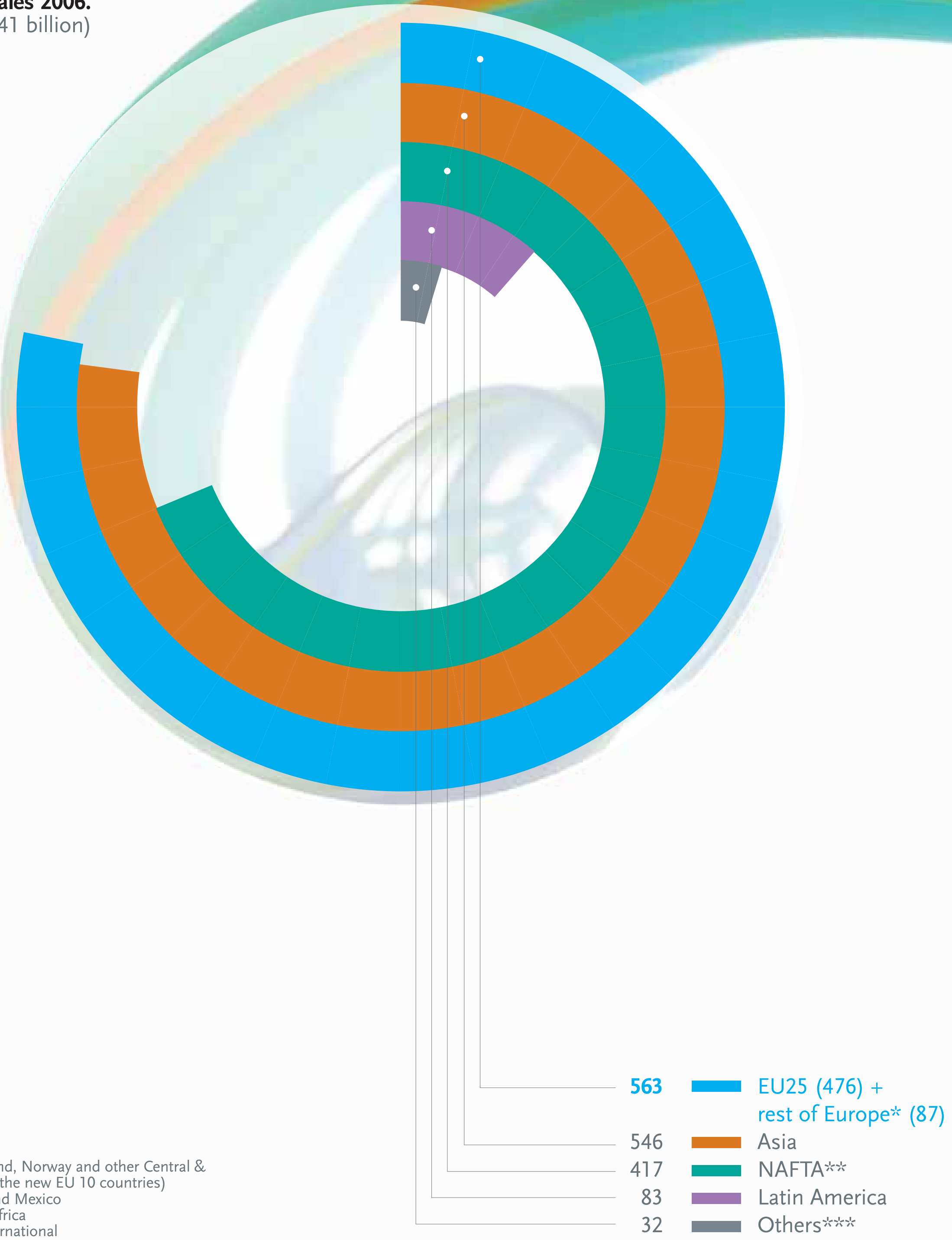
A remarkably large part of these products and innovations is currently made in Europe and is a major source of economic and social well-being for the people of Europe. The chemical sector is also one of Europe's most responsible industries.

As a responsible industry, focus has been put on the increase of the safety of products with concern for effect on health and environment. This will be further stimulated by the new legislation REACH.

Europe has the largest and most dynamic chemical industry in the world.

In terms of value, Europe produces one third of all chemical products sold worldwide. Fig.1

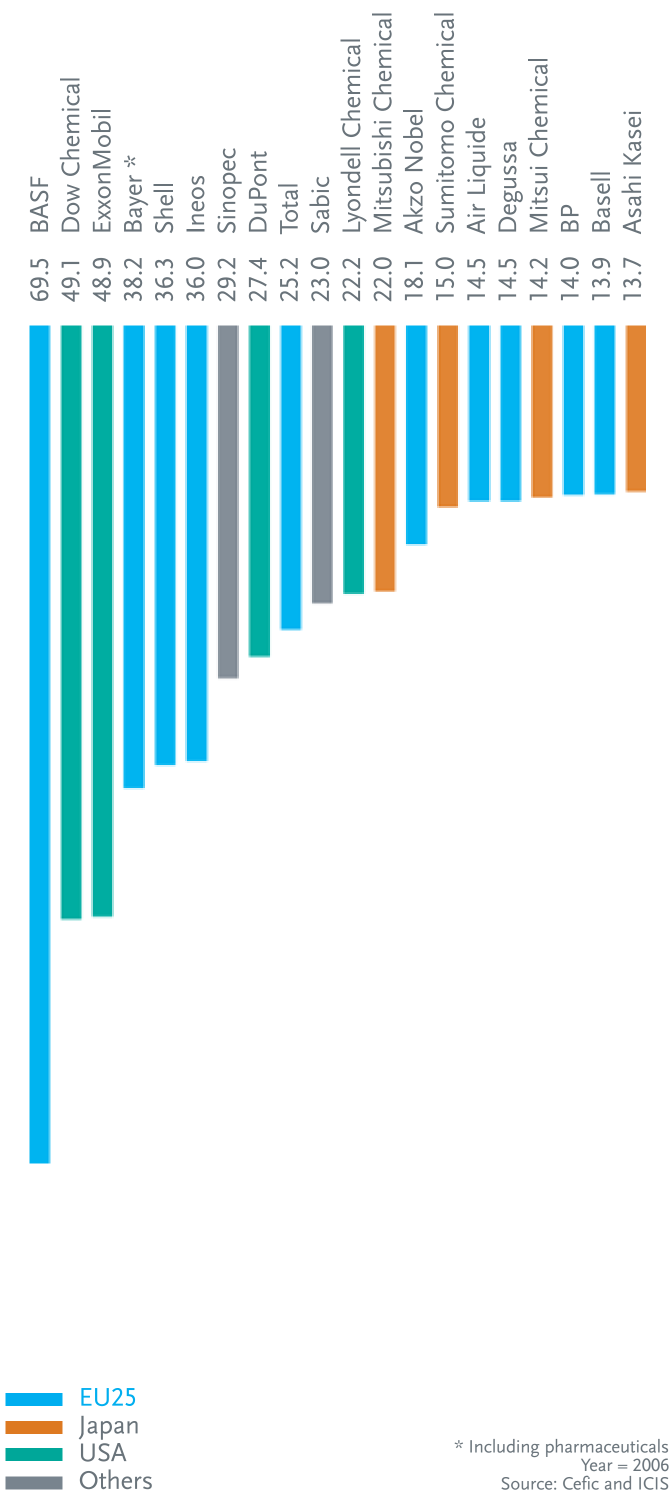
Fig.1 Geographical breakdown of world chemical sales 2006.
(estimated at € 1,641 billion)



In € billion
* Rest of Europe = Switzerland, Norway and other Central & Eastern Europe (excluding the new EU 10 countries)
** NAFTA = USA, Canada and Mexico
*** Others = Oceania and Africa
Source: Cefic Chemdata International

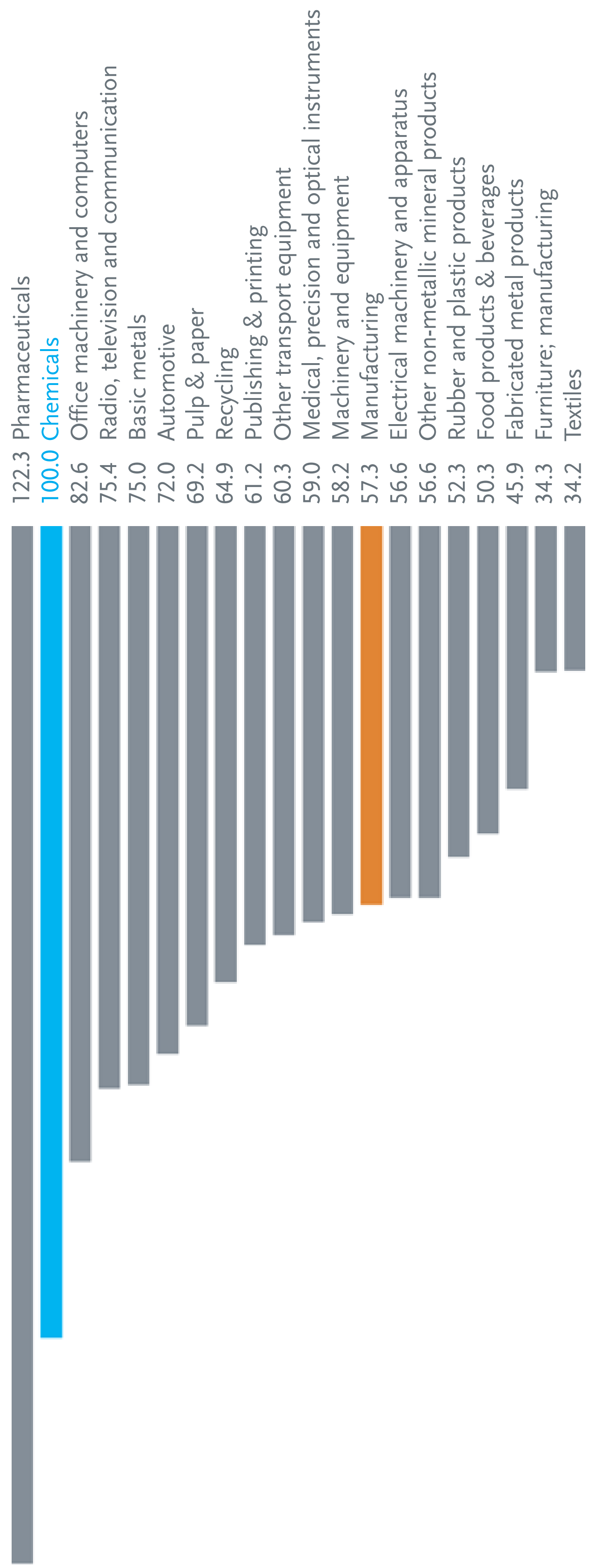
Among the 20 largest chemical companies in the world, 10 are European corporations. Fig. 2 Highly skilled, highly productive and well paid, a worker in the chemical sector produces almost twice as much added value as the average worker in the manufacturing sector overall. Fig. 3

Fig. 2 Half of the world's largest chemical companies are headquartered in the EU.
(sales in USD million)



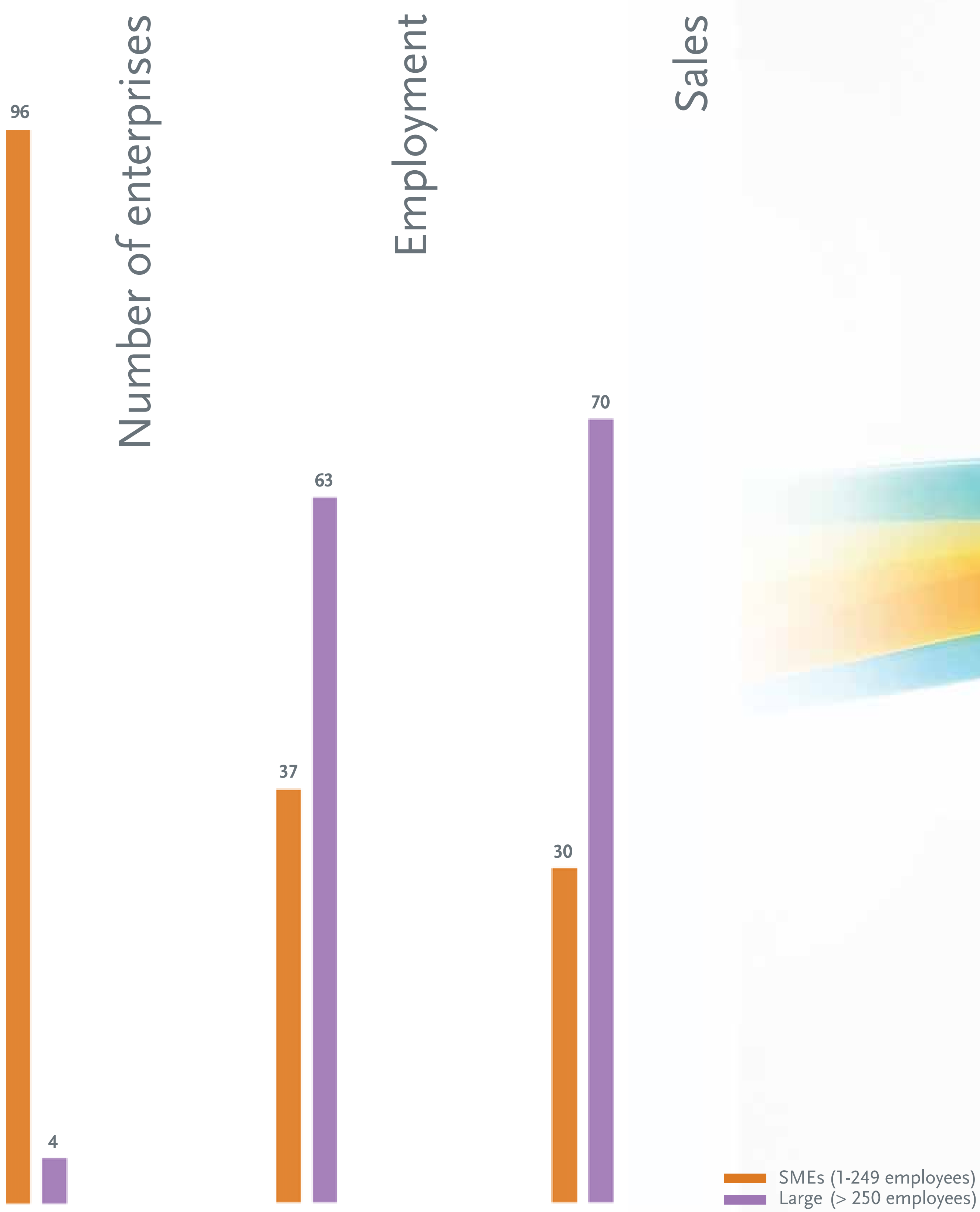
* Including pharmaceuticals
Year = 2006
Source: Cefic and ICIS

Fig. 3 Added value per employee in EU manufacturing.
(chemicals = 100)



Source: Cefic and Eurostat

Fig. 4 Number of chemical enterprises, employment and sales.
(in %)

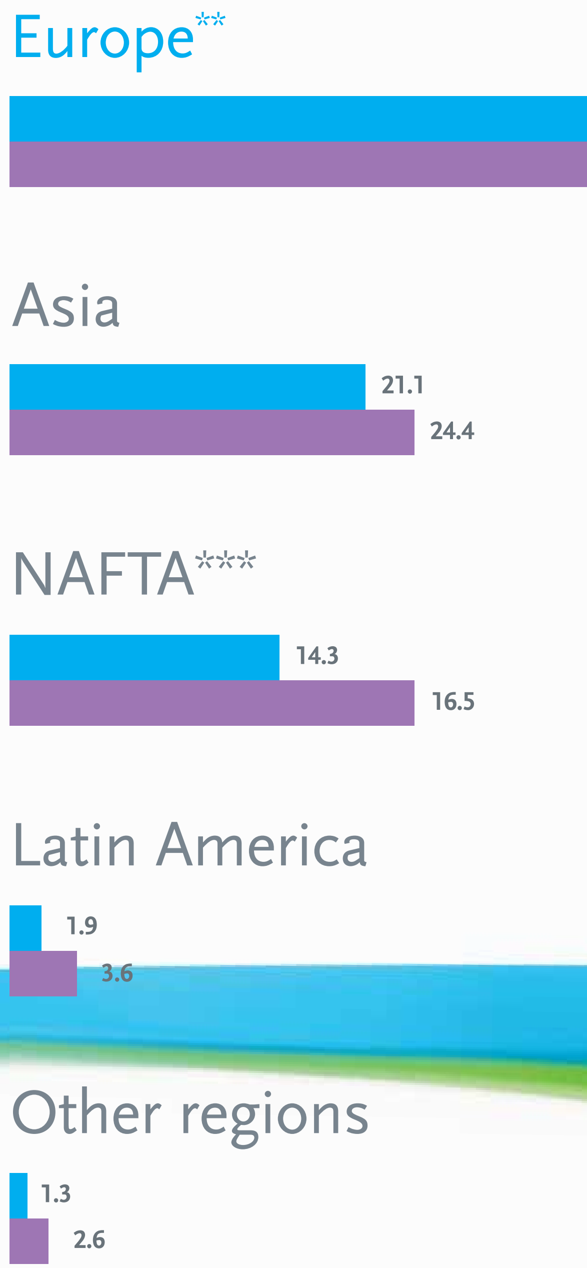


Source: Cefic and Eurostat

The chemical sector employs 1.2 million people in Europe. Among these, more than one-third are employed by 26,000 SMEs. These highly competitive SMEs are the backbone of innovations that benefit countless industrial customers and ordinary consumers. Fig. 4

The dynamism of the European chemical sector supports the region's overall economic performance and allows Europe to take an active role in emerging economies and to participate in the creation of global wealth. A major global trading partner, the sector registered a trade surplus of € 38 billion in 2005, or a quarter of the overall EU manufacturing trade surplus. Fig. 5

Fig. 5 Regional shares in world exports and imports of chemicals*.
(in %)

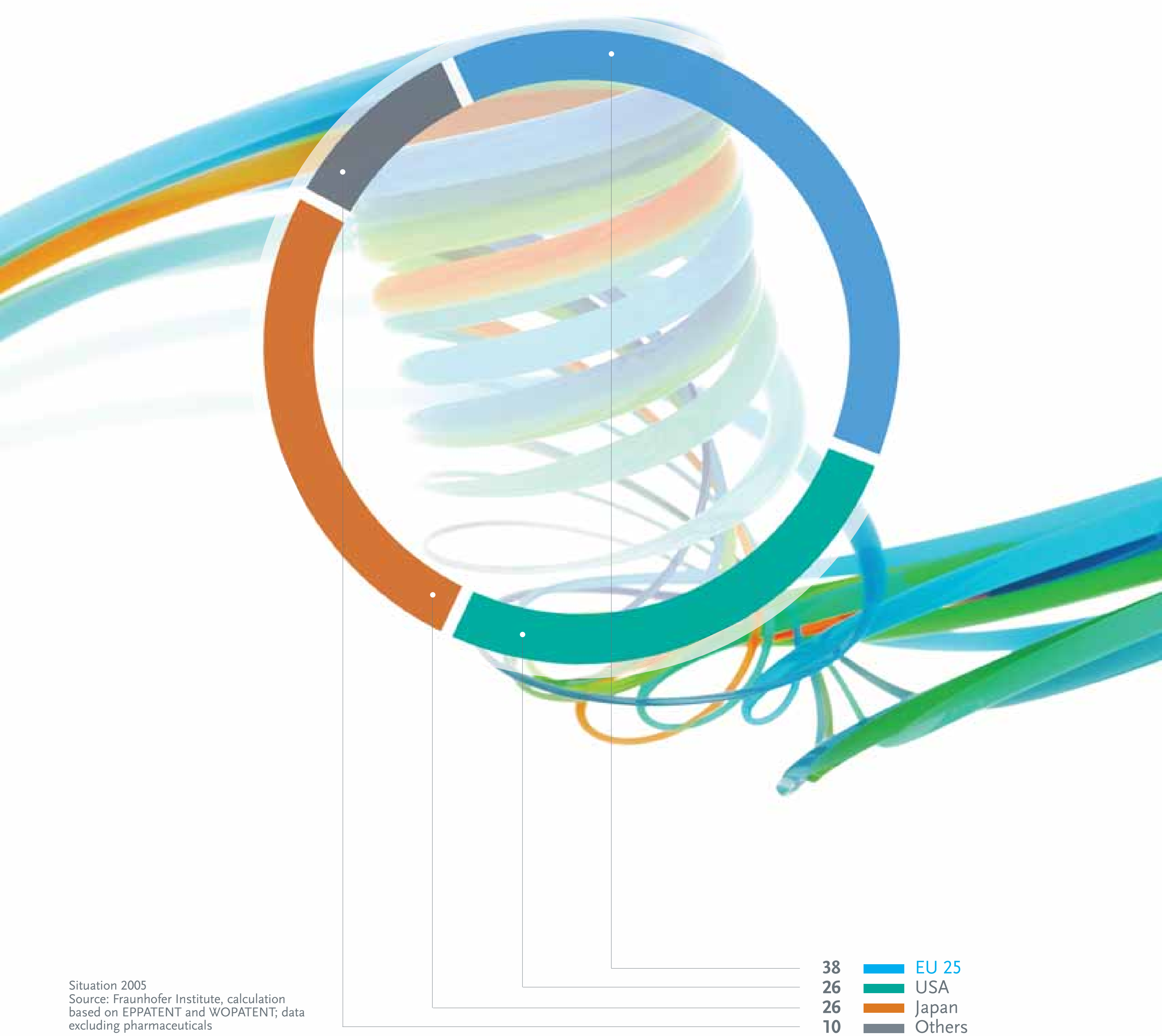


Situation 2006
* Including pharmaceuticals
** Includes = Switzerland, Norway and other Central & Eastern Europe
*** NAFTA = USA, Canada and Mexico
Source: Cefic Chemdata International and Eurostat (intra EU trade included)

The European chemical sector remains the world's most innovative.

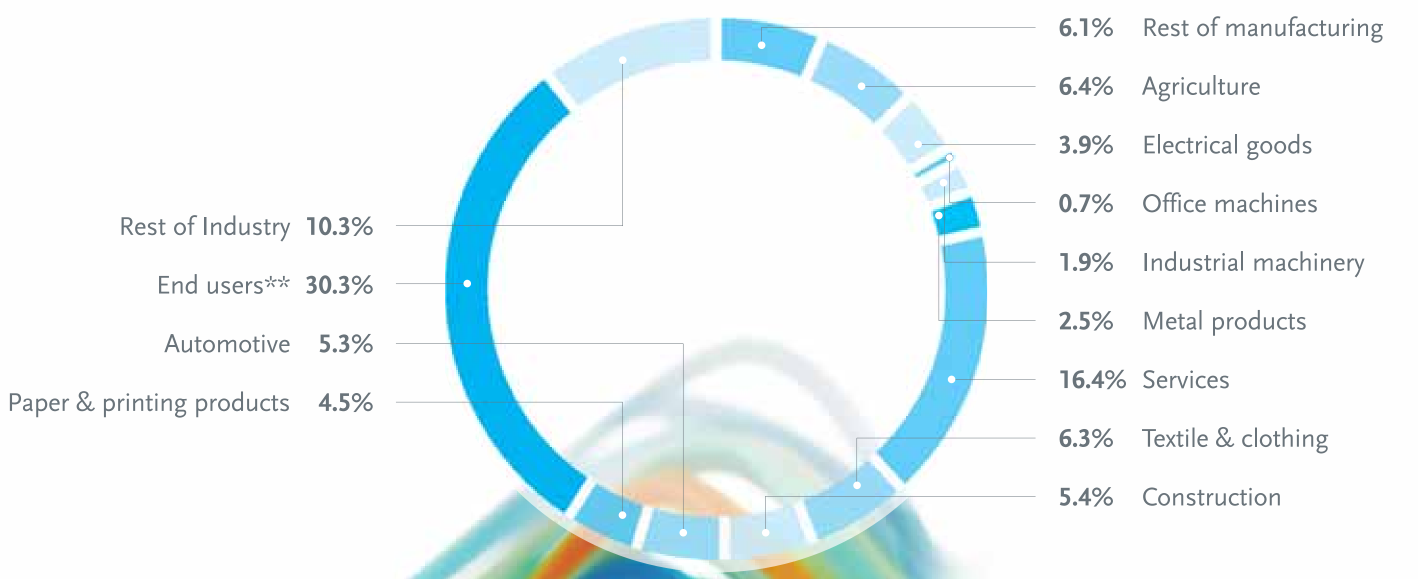
Although Europe is losing ground in some important emerging technologies, its chemical industry continues to punch above its weight in terms of innovation: of all patent applications in chemistry worldwide, an impressive 2 out of 5 were filed by Europeans. Fig. 6

Fig. 6 **Patent applications in chemistry worldwide.**
(in %)



Situation 2005
Source: Fraunhofer Institute, calculation based on EPPATENT and WOPATENT; data excluding pharmaceuticals

Fig. 7 Chemicals sales breakdown by user*.
(% of chemical domestic consumption)



* EU15
** End users: Final consumption = final consumption in households + government consumption + non profit organisations
Source: Cefic and Eurostat (input-output) analysis

Fig. 8 R&D spending per EU manufacturing sector.
(total = € 98.5 billion; year = 2003)

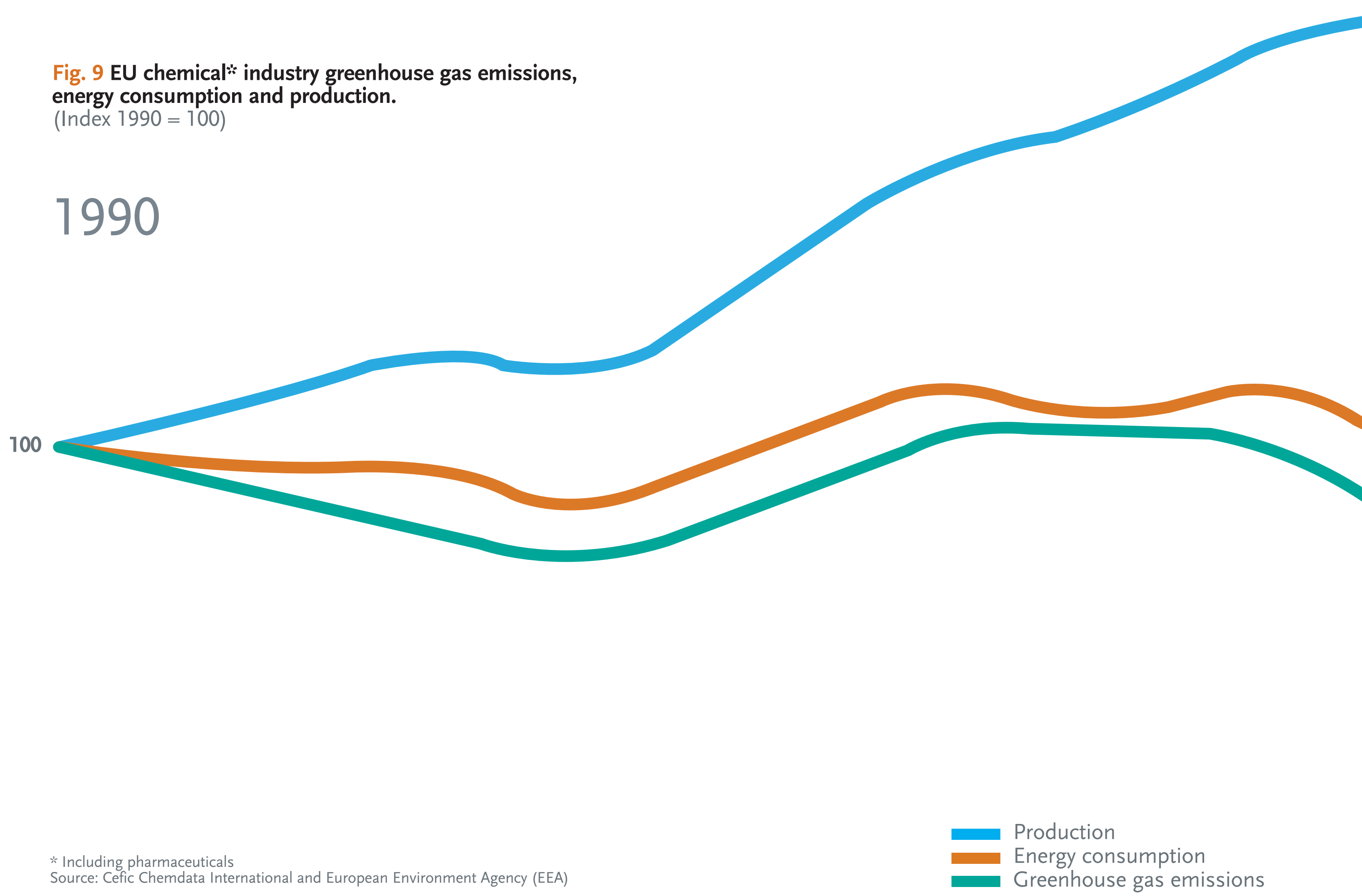
Source: Eurostat

Specialised and high value added chemical products fuel progress and innovation in many other industries. Typical examples are the aerospace industry, the car industry, telecommunications, electrical engineering and electronics. But the chemical industry is a vital supplier to virtually all sectors of the economy. Fig. 7

The chemicals sector is a key investor in research and development. With € 7.9 billion in annual R&D spending, it accounts for 8% of total EU R&D in manufacturing. If R&D spending by the closely related pharmaceutical sector is added, the two sectors together are the top investor in European R&D. Fig. 8

Europe's chemical industry is a responsible industry. Between 1990 and 2005, production in the EU chemical industry (including pharmaceuticals) rose by 60%, while total energy consumption was stable. This means the chemical industry has cut its energy intensity by 3.6% annually. Greenhouse gas emissions, meanwhile, fell by almost 30%. Fig. 9

Fig. 9 EU chemical* industry greenhouse gas emissions, energy consumption and production.
(Index 1990 = 100)



* Including pharmaceuticals
Source: Cefic Chemdata International and European Environment Agency (EEA)

The European chemical industry has made huge strides in energy efficiency and is Europe's No. 1 contributor to meeting the Kyoto emission targets.

In addition to increasing the energy efficiency of its own processes, the chemical industry plays a major role in increasing the energy efficiency of other industries and their products. Progress toward more energy efficient housing and transport relies on chemical products for insulation and lightweight materials.

The European chemical industry is committed to protecting human health and the environment. The sector is sparing no effort in making the new European regulation on the Registration, Evaluation and Authorization of Chemical substances (REACH) work on a daily basis. It is actively involved with a number of international authorities to advance the level of good chemicals management on a global scale.

By initiating and participating in the EU's High Level Group on Chemicals – along with representatives from NGOs, Member State governments and the European Commission, the industry is helping develop a vision to ensure that the business of chemistry will continue supporting European prosperity and quality of life well into the 21st century.

Europe's responsibility

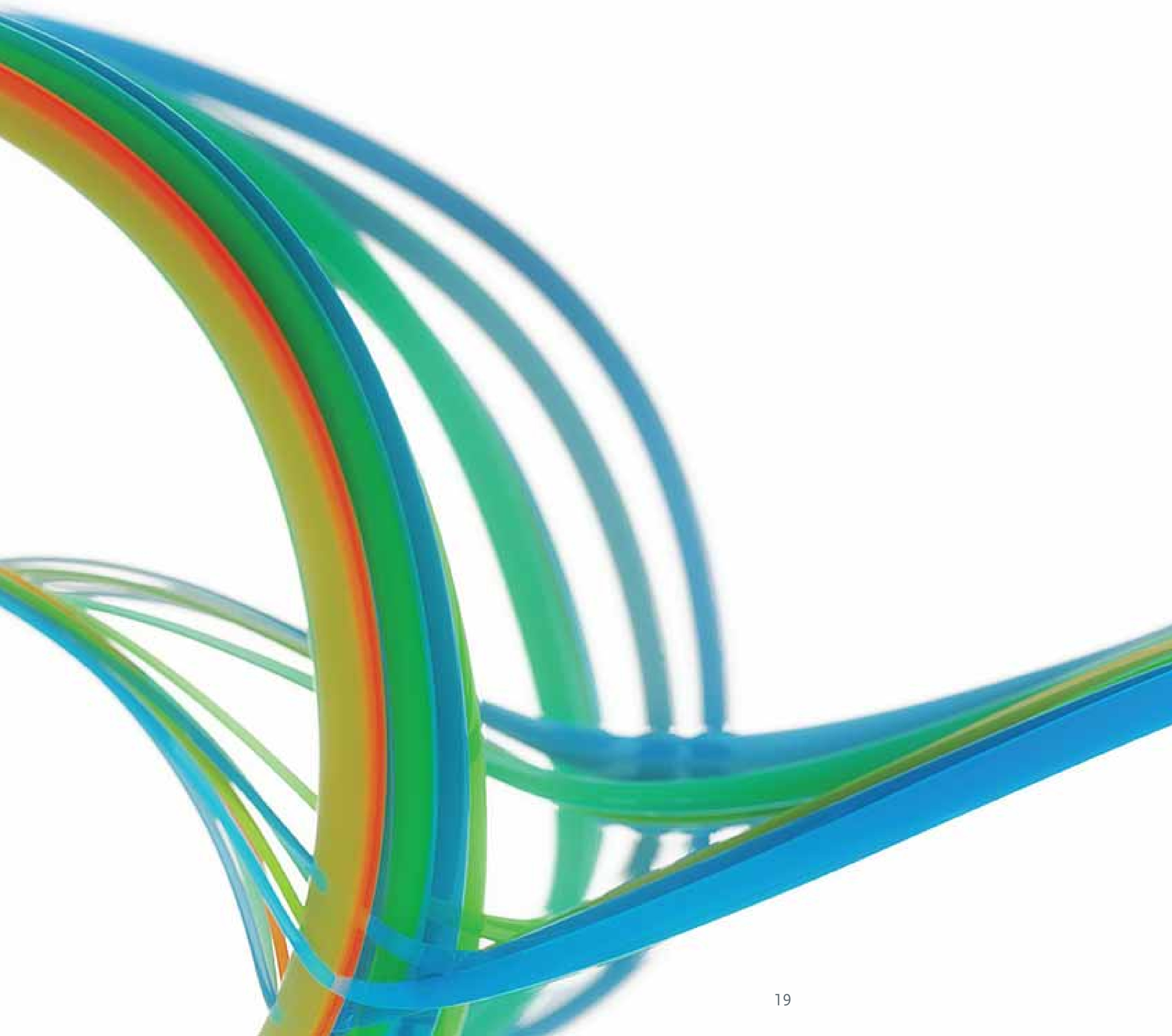
The chemical industry can help bring solutions to some of the global challenges and societal needs of our time. Europe has a major responsibility to ensure this industry remains competitive and capable of innovation.

There will be no progress on the challenges the world faces today without a competitive and innovative chemical industry. Home to the world's leading chemical industry, Europe has a major responsibility to ensure this industry remains competitive and capable of innovation.

Innovation, of course, is an important factor for competitiveness. But the relationship works the other way as well: Competitiveness must be maintained for innovation to take place.

Because it has a long innovation and investment cycle, the chemical industry is vulnerable and needs to function in a stable policy landscape.

Policy stability and predictability are prerequisites to maintaining the presence over the long term of a European chemical industry that is innovative and competitive. The two are intimately linked.

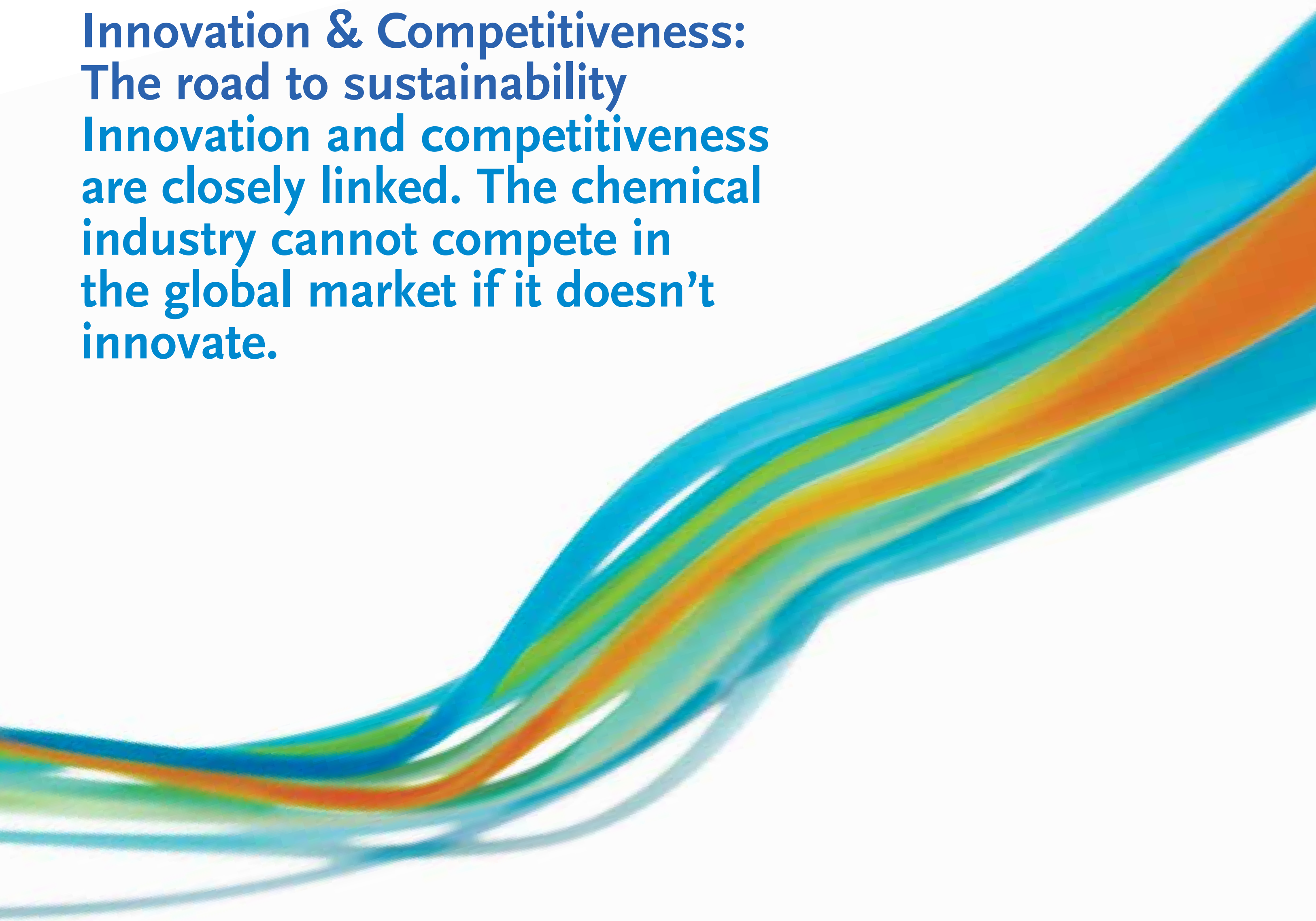


Cefic in action

An update on the innovation and competitiveness landscape; work in the EU's High Level Group on Chemicals; policymaking on energy and climate change and the implementation of REACH and online collaboration via ReachLink.

Innovation & Competitiveness: The road to sustainability

Innovation and competitiveness are closely linked. The chemical industry cannot compete in the global market if it doesn't innovate.



Likewise, the industry cannot reach its full innovation potential if it's not globally competitive. Innovation in the chemical industry is driven by the need for new applications and ever-greater performance. Many applications made possible by chemistry save more energy than it takes to produce them.

Innovation begins when chemical manufacturers listen to the strategic needs of their customers. It can be encouraged by government policy and regulators, but it is primarily driven by new demands from the market.

Competitiveness, on the other hand, is drastically shaped by regulation and economic policymaking. It is of growing concern to the chemical industry that the competitiveness element is all too often all but absent from current European policy debates on climate change, energy, the environment and health.

The development of new technologies is stymied by the belief that new technology necessarily entails new risks and that these new risks cannot be effectively mitigated or managed. European policy discussions on safety have evolved into something of Byzantine complexity, discouraging the launch of new products and the development of new applications.

Holistic approach Policy discussions and decisions about new risks and safety are, all too often in Europe, taking place separately in two distinct spheres - one focused on science and the other on regulation. Cefic is trying to advance a more holistic approach with initiatives such as the Long Range Research Initiative (LRI) and the SusChem project. The LRI is a science-based programme aimed at improving consumer and investor confidence in new technologies and products by identifying and filling the gaps in the understanding of the hazards posed by chemicals.

SusChem, the European Technology Platform for Sustainable Chemistry, seeks to boost chemistry, biotechnology and chemical engineering research, development and innovation.

These are long-term efforts. In the meantime, however, Europe is lagging behind the U.S. and other competing regions in the development and market introduction of new chemical-related technologies. The time to market for innovative chemical products and applications is much longer in Europe than it is in most other parts of the world.

Bio- and nanotechnology In the biosciences field, U.S. biotechnology companies have access to financial resources that are 10 times larger than that in the EU, and their revenues are double those of their European counterparts. In the fast-emerging field of nanomaterials and nanotechnology, 50% of the patents awarded worldwide between 1995 and 2003 were in North America; Europe's share was a mere 20%. These are worrying trends. Unleashing the chemical industry's potential for innovation is something that requires much greater and urgent attention from European policymakers.

Major challenges Innovation by the chemical industry is an important conduit to the solutions required to meeting some of the major challenges of our time: climate change, lessening our dependence on fossil fuels, the development of renewable energy sources, food production, fighting new diseases, water treatment, pollution control, decent and affordable housing and many more...

Some chemical-based solutions to help slow down climate change: Energy generation, energy storage, energy usage, energy savings.

Energy generation
- Materials for carbon-neutral photovoltaic and thermoelectric energy generation
- Bio catalysis to produce feedstock from biomass or coal with neutral or negative carbon emissions

Energy storage
- Materials for high-performing battery systems
- Hydrogen technologies

Energy usage
- Fuel cells in transport applications
- LEDs/OLEDs in lighting applications

Energy savings
- Thermal insulation materials in building applications
- Light materials for automobiles, trucks and airplanes
- Non-toxic antifouling coatings for ships

Long-term vision There will be no substantial progress to a more sustainable society without the input from a competitive and innovative chemical industry. This is why the industry is contributing to the development of a long-term industrial policy vision in the EU's High Level Group on the Competitiveness of the European Chemicals Industry.

The purpose of the High Level Group is to set the basis for developing a policy environment that encourages technology leadership and competitiveness.

Energy and climate policy: Critical factors for competitiveness

A competitive and innovative chemical sector is not a given It is the result of an integrated value chain starting with schools and universities, R&D, the manufacturing of base chemicals, intermediates, precursors, materials and consumer products, as well as the development of new applications. Europe must maintain a strong presence in each of the elements of this chain. If one part leaves Europe, the other parts will ultimately move elsewhere as well and innovation will die out. The domino effect along the supply chain will affect the development of new products and applications. In a context of rising energy prices and mounting concerns about the global climate, policymaking on energy and emissions is of particular importance to competitiveness.

Climate change is a worldwide challenge and must be addressed on a global scale. The chemical industry is a major consumer of energy and, as a consequence, an emitter of greenhouse gases. But Europe's chemical industry has a remarkable track record on energy efficiency, and innovative, climate-friendly, chemistry-led applications provide many of the required solutions. This is why any effective policy on energy and climate change must take the chemical industry's unique role into account.

Help for SMEs Discussions in the EU High Level Group have ensured that the European industry has gathered much useful information and intelligence about climate- and energy-related issues affecting the industry. There have been positive discussions on investment in better transport and logistics infrastructure. But, despite intense and fruitful discussions with the European Commission and other stakeholders, the chemicals industry remains worried about the effect of current EU policy proposals to combat climate change on competitiveness and innovation.

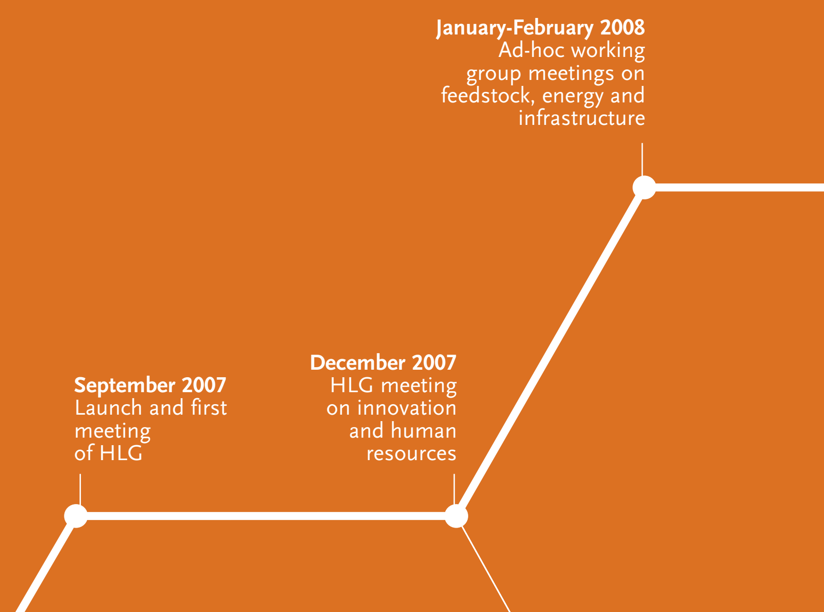
During the High Level Group discussions, the European Commission has signalled its willingness to shield many small and medium-sized enterprises from the effects of the Emissions Trading Scheme. SMEs are fragile but very often highly innovative and essential for new applications. Nevertheless, the current ETS policy will continue to have a major negative competitive impact on much of the chemical industry, since the level playing field is changed unilaterally.

Investment on hold Combined with the lack of clarity on the future treatment of energy intensive industries, the policy has prompted many companies to put major investment projects on hold and is encouraging the delocalisation of some activities. The risk for so-called "carbon leakage" is high and will increase global CO_2 emissions due to unfavourable energy mixes in competing regions such as the Middle East and Asia.

If current policy plans aren't amended and major regulatory uncertainties lifted, delocalisation will accelerate. This will not help Europe, nor will it help the planet.

Indeed, the European chemical industry is far more energy efficient than industry in most other parts of the world. It has far lower greenhouse gas emissions and continues to curb emissions. The industry needs to be assured that society will support its efforts to remain competitive. Otherwise, investment and innovation in Europe will dry out.

For the first time in the EU's history, business and political leaders are combining their efforts to map out the future of the European chemical industry.



The EU's High Level Group (HLG) on the Competitiveness of the European Chemical Industry, which was established at the behest of Cefic, held its first meeting in September 2007. The HLG is scheduled to hold the final of five meetings in February 2009 and formulate a series of actionable, sector-specific policy recommendations.

The HLG brings together people from different horizons.
The chemical industry has 6 of the 25 seats: François Cornélis (Total), Tony Bastock (Contract Chemicals), Jürgen Hambrecht (BASF), Thierry Le Hénaff (Arkema), Giorgio Squinzi (MAPEI) and Ben Van Beurden (Shell Chemicals).

The other HLG members represent the European Commission, EU Member States, regional authorities, downstream user industries, importers and distributors, trade unions, environmental and consumer NGOs, as well as the academic world.

Among the topics covered by the group's work plan are innovation, trade, energy and feedstock, human resources and skills, as well as infrastructure and logistics. The meetings of the group take place in the Commission's Brussels headquarters.

Each full-day meeting is the subject of intense preparatory work and pre-meetings by so-called sherpas.

The HLG has so far managed to endorse a work plan for stimulating research and innovation in the European chemical sector, and has made good progress on issues related to climate change and energy, including agreement in principle on measures to help SMEs cope with EU climate change policies.

"It's been a great opportunity to make our case on the Emissions Trading Scheme and what it means for our industry," says a sherpa.

One practical outcome of the HLG, participants say, has been to bring together facts and analysis about the chemical industry that had been dispersed. The intelligence is proving of great value to help the industry make its case in various policymaking forums.

March 2008
Adoption of recommendations on innovation

April 2008
HLG meeting on feedstock, energy and infrastructure

October 2008
HLG meeting on global competitiveness and trade

February 2009
Concluding HLG meeting - outlook for the European chemical industry

Günther Verheugen
Commission Vice President

"The EU chemicals industry is a world leader today and makes an enormous contribution to growth and jobs in Europe. However, there are clear signs that it is facing unprecedented challenges both from the effects of global change and the expectations of our citizens. With this initiative we aim to ensure the right framework conditions for the chemicals industry to continue operating and investing in the EU on a sustainable basis".

François Cornélis
President of Cefic,
Vice Chairman of Total

"It is no understatement to say that our expectations run high; the High Level Group can play an important role in ensuring the European chemical industry remains a global leader. This industry needs the support of society and policymakers if it is to remain an engine of innovation and a source of prosperity for Europe".

Implementing REACH: A commitment to safe chemicals management

REACH entered into force on June 1, 2007. One of the fundamental changes brought by REACH is the change of responsibility from public authorities to industry in demonstrating the safe manufacture and use of chemicals. Cefic and the chemical industry are taking up this responsibility as part of their continuing commitment to increasing the level of safe chemicals management and protecting human health and the environment.

During the past 12 months, Cefic has continued its support to businesses in their preparation for REACH, supporting effective compliance to the benefit of European business and society at large. Together with Cefic members, practical step-by-step guidance has been developed and communicated in numerous newsletters and workshops.

Some of these tools and guidelines are open to all businesses – and not restricted to Cefic members. This open approach helps ensure effective REACH implementation, contributing to the sustainability of the European chemicals industry.

Implementation guidance **The REACH regulation leaves a certain margin for interpretation on how to meet several specific requirements.** The REACH Implementation Projects (RIPs) are intended to develop guidance for chemical producers and their many customers, as well as for public authorities on many practical steps in order to ensure a workable REACH.

As part of their new responsibilities under REACH, Cefic and its members have actively participated in the European Commission's RIPs. Cefic took the lead for the project developing the central guidance for industry on how to fulfil the Information Requirements in REACH and how to do Safety Assessments. This major undertaking was finalised in May 2008 and published on the European Chemicals Agency website (www.echa.eu).

Pre-registration help **REACH implementation started on June 1, 2008, with pre-registration.** This is the first step to be taken by companies under REACH. Although the information required is limited, pre-registration is an important, necessary step in order to benefit from the tiered registration timetable. Companies that fail to pre-register will have to register their substances from 1st December 2008 to be able to continue importing or manufacturing them. Several documents have been produced and workshops organised by Cefic to raise awareness and to supplement the guidance from the European Chemicals Agency in Helsinki.

Tools open to all **The next step in REACH is to share data and to prepare for joint submission of parts of the Registration dossier in Substance Information Exchange Fora (SIEFs).** This requires extensive communication between companies, something that would be difficult to achieve without the appropriate IT resources and tools.

Cefic decided, together with the German, French, British, Spanish and Italian associations, to create a company called ReachLink and develop a unique IT tool that allows companies to share data by participating in an online SIEF. It provides for data sharing in a manner that is adequately structured, fully secure and confidential.

The ReachLink tool, named SIEFreach, is open to all entities that need to register their substances under REACH.

Consortia management **Separately, the Cefic-backed ReachCentrum is offering consortia management and consultancy services to Cefic members and other interested parties.** Since EC Competition Law may apply to REACH activities when companies are co-operating in SIEFs, exchanging data and working together in consortia, Cefic produced detailed guidance under the format of DO's & DONT's applicable to the management of REACH activities.

Consortia are an efficient means for achieving the kind of inter-company cooperation required by REACH. They need to be carefully managed to ensure that the business interests of manufacturers and importers of chemical substances remain adequately protected. In that respect, a Cefic consortium model contract has been elaborated for Cefic Company and Federation Members, Sector Groups and Affiliated Organisations.

ReachCentrum also offers expert consultancy to REACH implementation teams inside companies and other organisations, as well as tailored training sessions and workshops.

Fine-tuning the regulation **While the process of REACH compliance has begun at many companies, some of the more difficult points of the regulation were still being finalised during the past year.** Cefic has been actively participating and providing input with regulators and other stakeholders in this fine-tuning process.

Areas where Cefic has helped achieve progress include crucial issues such as exemptions from registration and criteria for PBT substances (persistent, bio accumulative and toxic). The PBT issue has an influence on the authorisation of a particular substance.

Global progress **Cefic, meanwhile, remained actively involved in a number of international and global fora with the aim of advancing the level of good chemicals management on a global scale.** These include advancing the product stewardship initiative of the International Council of Chemical Associations, European implementation of the Globally Harmonized System of Classification and Labelling of Chemicals, various capacity building initiatives as well as furthering Responsible Care®.

Cefic and the European chemical industry are stepping up their efforts to engage with stakeholders far and wide, building trust in chemicals and the companies that make them.

Chatting about science, online with students Attracting young talent is a major challenge; the number of young people opting for science education is shrinking at the alarming rate of 10% per year. Coordinated by the European Schoolnet, a consortium set up by education ministries in 28 European countries and regions, Xperimania encourages students and their teachers to think differently about scientific education.

The Cefic Petrochemistry Programme has been organising a series of "Xperimania" Internet chat sessions with secondary-school students to discuss topics such as career opportunities in the chemical sector, petrochemistry, the environment and other topics.
www.xperimania.net

Cooperating in the hunt for animal testing alternatives Animal welfare and testing is an issue of concern to many European citizens and legislators. Extensive testing required by the entry into force of REACH ensures the issue remains firmly in the spotlight.

In a bid to help the industry come up with solutions for the refinement, reduction and replacement of animal testing, Cefic backed up the creation of the European Partnership for Alternative Approaches to Animal Testing (EPAA), a joint initiative by the European Commission, a number of corporations and trade federations. Started in 2006, the EPAA partnership is stimulating cooperation in fundamental research, the formulation of new policy, the sharing of best practice and the acceptance and promotion of alternative approaches.
www.epaa.eu.com

Raising the comfort level with nanomaterials

Emerging nano-scale technology plays a significant role in contributing to sustainable development. While nanomaterials can be used safely and responsibly, recent history has taught us that the public acceptance of risk is rooted in the adequate information and consultation of stakeholders. Cefic is helping industry bridge that gap.

Cefic held a first industry-only workshop on nanomaterials in October 2007 involving the chemicals, automotive, food and cosmetics sectors. This led to a stakeholder engagement on nanotechnologies held on 24 June 2008, creating a unique interactive forum for the chemical industry and its supply chain as well as representatives from the European Commission, NGOs, trade unions, consumer associations and academia.

This first event focused on nanomaterials in environmental technologies and coatings. But more engagement initiatives are to follow, with the objective of setting the basis for a common understanding of priorities regarding the usage and regulation of nanomaterials.

Other outreach initiatives

- Cefic focused its Responsible Care® programme on small and medium-sized enterprises by developing specific activities to build capacity in the SMEs and by launching a specific award for SMEs under its yearly Responsible Care® award programme, in a bid to encourage more SMEs to submit entries.
- In April 2008, Cefic invited representatives of sector groups and downstream industries to a workshop to start developing a common approach on indoor air quality.
- More than 180 delegates and stakeholders from all over Europe gathered in Berlin in January 2008 to discuss the achievements and future of the Cefic-backed European Technology Platform for Sustainable Chemistry (SusChem).

Responsible Care®


click-in cefic
The European Chemical Industry Portal
Logout
Welcome
ORGANISATION
Use the interactive
chart of Cefic to learn about
objectives, people and
details.

Click in and tap into the Cefic portal: data, analysis, contacts are at members' fingertips.

One of the more outstanding recent developments within Cefic is the launch of an extranet portal for Cefic members: click-in cefic.

The portal aims to provide members with a single entry point for all Cefic-related data and services. Integrating the e-spotlight newsletter and archive, the portal provides specialised, up-to-date news and information in a format that is easy to use.

At the heart of the portal is a fully searchable, up-to-date information database of all the policy issues and activities managed by Cefic.

The database currently lists about 100 "horizontal" activities and issues that concern the entire industry. It provides detailed, yet condensed information on the full spectrum of issues – from classification and labelling to climate change, socio-economic analysis, energy, health, new technologies, intellectual property, legal matters, product stewardship, safety, sustainable development, taxation, animal testing, trade, transport, Responsible Care and many, many more.

In the next few months, the portal will also address "vertical" issues and activities.

Managing issues requires action. This is why the issues and activities database is designed to be pragmatic, by focusing on usable, practical data such as current state of play, impact on the industry, industry position and past and future actions.

Action, in turn, requires people. The new portal includes an organization chart of the people that make up Cefic and its network, providing names and contact details.

The entire portal is designed to be interactive, so that issues, activities and peoples' names and details are all interlinked. It provides the user with a clear view of how and who in the Cefic network is working on a particular issue.

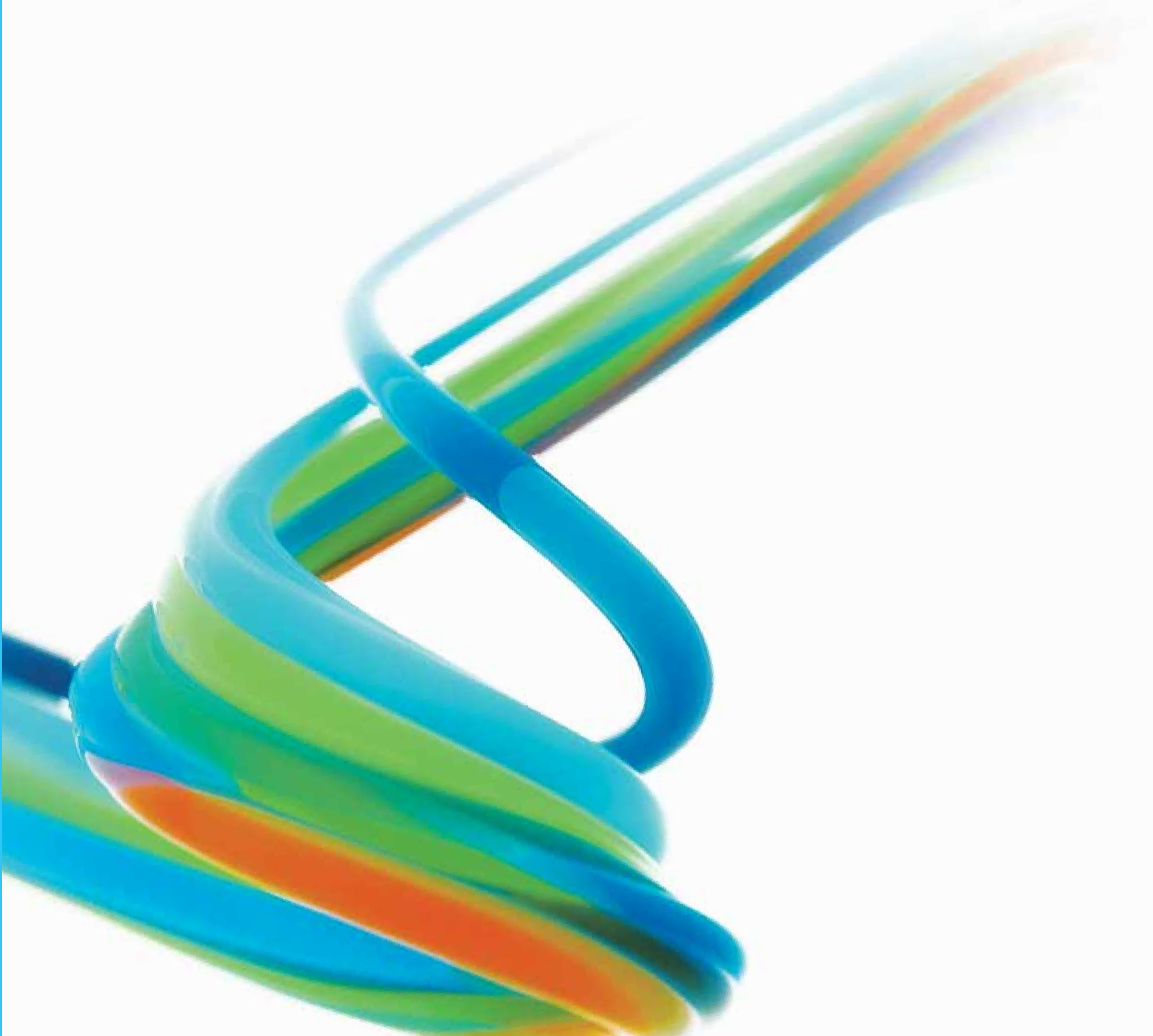
The portal also includes a library of important Cefic publications, position papers and reference documents that support and document the advocacy actions. And to facilitate day-to-day work, it provides a simple and secure point of access to Cefic's existing collaborative issues management e-platform (ecefic).

The new portal is for Cefic members only and protected by password. It is accessible at work, at home or on the road at http://click-in.cefic.org.

Click-in cefic is an indispensable tool for Cefic members to help them in their advocacy work and for keeping abreast of the issues affecting the overall industry, specific industry sectors and businesses. Any of our members who do not yet have a password are urged to contact Cefic immediately (click-in@cefic.org).

Cefic is built on a strong and cohesive network of industry associations at the European, national and sectoral levels.

The network structure provides Cefic with the legitimacy, representativeness and credibility as the voice of the chemical industry in Europe. By leveraging European, national and sectoral expertise, the Cefic network proves a strong and effective advocate for the industry. Spanning the entire industry value chain, the Cefic network can effectively interact with European society in all its diversity.



National associations

National chemical associations are the basis of Cefic's representativeness as an industrial stakeholder.

They relay the industry's "One Voice" advocacy at the national, regional and local levels, particularly on horizontal issues affecting the entire industry. Turn the page to see some recent initiatives.

Industry sectors

The four industry sectors exist alongside the Cefic Policy Centre in order to pursue those initiatives which are specific to individual industries.

They ensure effective sharing of knowledge and collaboration throughout the entire network.

Turn the page to see highlights of recent work.

National associations

Austria FCIO - Fachverband der Chemischen Industrie Österreichs

Belgium essenscia - Belgian federation for chemistry and life sciences

Czech Republic SCHP - Svaz chemického prumyslu Ceské republiky

Denmark PIBF - Procesindustriens Brancheforening

Finland KT RY - Kemianteollisuus ry

France UIC - Union des Industries Chimiques

Germany VCI - Verband der Chemischen Industrie

Greece HACI - Hellenic Association of Chemical Industries

Hungary MAVESZ - Magyar Vegyipari Szövetség

Ireland PharmaChemical Ireland

Italy FEDERCHIMICA - Federazione Nazionale dell'Industria Chimica

Netherlands VNCI - Vereniging van de Nederlandse Chemische Industrie

Norway NI - Norsk Industri

Poland PIPC - Polish Chamber of Chemical Industry

Portugal APEQ - Associação Portuguesa das Empresas Químicas

Slovak Republic ZCHFP - Zväz chemického a farmaceutického priemyslu Slovenskej republiky`

Slovenia CRA - Zdruzenje kemijske in gumarske industrije

Spain FEIQUE - Federación Empresarial de la Industria Química Española

Sweden Plast- & Kemiföretagen

Switzerland SGCI Chemie Pharma Schweiz - Schweizerische Gesellschaft für Chemische Industrie

Turkey TKSD - Turkiye Kimya Sanayicileri Dernegi

United Kingdom CIA - Chemical Industries Association

Associate national associations

Bulgaria Branshova Kamara na Turgovskite Drujestva ot Chimicheskata Promishlenost

Croatia UKI - Udruzenje Kemijske Industrije

Estonia Eesti Keemiatoostuse Liit

Latvia LAKIFA - Latvijas Kimijas Un Farmacijas Uznemeju Asociacija

Lithuania Lietuvos Chemijos Pramones Imoniu Asociacija

Romania FEPACHIM - Federatia Patronatelor din Ramura Industriei Chimice si Petrochimice din Romania

National associations highlights

Belgium

A new name and R&D tax break essenscia is the new name for the Belgian federation for chemistry and life sciences. The brand positions the industry as modern, efficient and socially conscious. Meanwhile, essenscia won a boost for R&D, as the Belgian government agreed to increase tax breaks for companies who employ engineers and holders of PhDs and master degrees in their research departments.

Finland

Investing time in Russia Finland's Chemical Industry Federation and Chemical Workers' Union are cooperating with their Russian counterparts to foster good occupational and environmental safety practice and implement Responsible Care® in Russia. As a result, Russia officially joined the ICCA's Responsible Care® programme in October 2007.

France

New identity for stakeholders The phrase "Les industriels de la chimie, l'avenir comme exigence" marks the start of a UIC communication initiative aimed at its stakeholders: communities, the young, elected officials, journalists and the general public. Under the phrase "les industriels de la chimie," UIC members are speaking with one voice and with the common aim of furthering solutions for sustainable development. The existing UIC identity remains for more technical advocacy matters.

Germany

REACH support and climate change VCI and the VCI sector associations launched a joint service platform for REACH implementation. Called REACHumsetzen, the platform provides specialised legal advice and information. Meanwhile, VCI obtained the continuation – and even some improvement – in German rules easing the burden for energy-intensive industries under the country's energy and climate programme. And VCI launched a communications campaign highlighting the importance of biotechnology, genetic engineering, nanomaterials and catalysis.

Italy

Life without chemistry? The video Living Without Chemistry has helped focus the attention of students and many others on the fact that chemistry is indispensable to modern life. The five-minute spot shows someone falling asleep while reading an article claiming people can do without chemistry. When the person wakes up, most of the objects around him have disappeared. The video received the Confindustria award for the best communication campaign by an industrial association.

The Netherlands

Government funds innovation The Dutch government has earmarked €52.3 million for innovation programmes in the chemical sector for the years 2008 to 2011. Research will focus on materials and biotechnology for specialties; catalysis and sustainable processes; and process technology. The Dutch chemical industry aims to slash CO_2 emissions by 50% in 25 years and double its contribution to the nation's GDP during the next decade.

Poland

A tree for a bottle Amid rising public awareness of environmental matters, the Polish chemical sector has wasted little time in implementing Responsible Care® with positive effects on regulatory compliance and the reputation of the industry as caring about people and the environment. Under the industry campaign "A tree for a bottle", more than 94,000 children have collected 3.5 million plastic bottles and planted 5,568 trees during the past 5 years.

Spain

Molecular cuisine for MPs Feique presented its first Sustainable Development Report during a lunch in Madrid concocted by Ferrán Adriá, the famed head chef of the El Bulli restaurant in Roses on the Costa Brava. Adriá, who is often associated with "molecular gastronomy," used sophisticated chemical processes to prepare a surprising menu composed of nitro caipirinhas, spherical cheeses, liquid croquettes and other delights. The lunch was attended by more than 40 members of the Spanish Parliament's industry and environment commissions.

The UK

Awards and case studies The CIA staged its biggest ever awards ceremony at the National Railway Museum in York. Eleven awards were presented to individuals and organisations for outstanding achievement. The winners included Dr. Brian Murphy of Robinson Brothers Ltd. for his contribution to the chemical industry in the UK and in Europe; Jennifer Clark of Eastman won the Young Ambassador competition and became chairwoman of the CIA's Future Forum; and Johnson Matthey won the Company of the Year award. The winners and all of the entries are used as case studies to promote the chemicals industry in the UK.

Industry sectors

Fine, specialty and consumer chemicals: Groundwork for REACH

With REACH pre-registration beginning in June 2008, activity of the FSCC sector groups was dominated by preparatory work for the formation of consortia. A major challenge has been to develop a single consortium agreement that reconciles the need for data sharing within the constraints of competition law. The resulting framework provides for some latitude to meet the specific needs of certain sector or product groups. Meanwhile, the FSCC programme has launched a project to counteract threats of substance “deselection” by retailers and other downstream industry groups ahead of the regulatory process.

Petrochemistry: An alternative to ETS

Amid the review of the EU’s Emissions Trading Scheme, the Association of Petrochemicals Producers in Europe undertook an extensive study to demonstrate that the petrochemical sector is fully exposed to international competition. Without an international agreement putting similar constraints as the ETS system on producers outside the EU, auctioning costs for emission rights will threaten the future of the European petrochemicals industry and constrain its capacity to invest in emissions reductions and new, climate-friendly technology and products. APPE is developing alternative proposals based on benchmarking as a way to measure environmental performance and calculate the corresponding emission rights.

Euro Chlor: Energy intensive

Energy – a major raw material and cost element of the chlorine industry – came into sharp focus in 2007 with the Commission’s review of the Emissions Trading Scheme. Euro Chlor and its partners and allies presented the case for the industry to be considered an “Energy Intensive Industry” requiring special treatment to preserve its competitiveness. Although the energy-intensive-industry concept remains a subject of political debate, there are encouraging signs that the importance of preserving a robust EU manufacturing base is being acknowledged.

PlasticsEurope: Open discussion

In 2007, PlasticsEurope used a variety of tools to reach out to young people and opinion formers, communicating the benefits of plastics in terms of energy efficiency and climate protection, resource efficiency and consumer protection. In addition to the educational website FuturEnergia, PlasticsEurope launched Youth Parliament Debates to discuss plastics, energy and climate change and engaged constructively with MEPs. To help understand what may lie ahead in the next few decades, Plastics Europe commissioned the report “The World in 2030” from futurologist Ray Hammond. Industry Action Teams have been established to address the issues raised by the report. We have also strengthened our dialogue with the entire plastics value chain through the Retailer Road Show initiative piloted in the UK, a very successful IdentiPlast 2007 conference and an outstanding K 2007 stand.

Industry Sectors

Fine, Specialty and Consumer Chemicals (FSCC)

Resins, Dyes, Pigments, Fillers and Catalysts

Pigments, Dyes, Fillers & Catalysts

ASASP Association of Synthetic Amorphous Silica Producers
Cyanides
ECMA European Catalysts Manufacturers Association
EPEM European Producers of Electrofused Minerals
ESAPA European Soda Ash Producers Association
Eurocolour Pigments, dyes and fillers producers
Organoclays
PACTE Producers Association of nanoCarbon tube in Europe
PSMA Physical Sunscreen Manufacturers Association
SSPA Sodium Sulphate Producers Association
TDMA Titanium Dioxide Manufacturers Association
ZOPA Zinc Oxide Producers Association

Resins

ALIPA Aliphatic Isocyanates Producers Association
CES Centre Européen des Silicones
EMPA European Melamine Producers Association
EPDLA European Polymer Dispersion and Latex Association
FormaCare
HARRPA Hydrocarbon And Rosin Resins Producers Association
PPRM Polyester Powder Resins
SRM Solvent Resins
UV/EB Acrylate Resins

Plastics Additives

EBFRIP European Brominated Flame Retardant Industry Panel
ECPI European Council for Plasticisers and Intermediates
EEVA Epoxydised Vegetable Oils
EFRA European Flame Retardants Association
ELISANA European Light Stabilisers and Anti-oxidants association
ELOA European Lead Oxide Association
ERCA European Rubber Chemicals Association
ESPA European Stabilisers Producers Association
ETICA European Tin Catalysts Association
FCA Food Contact Additives Sector Group
PUR Pur Amines Catalysts

Performance chemicals

Oleochemicals and surfactants

APAG European Oleochemicals & Allied Products Group
CESIO Comité Européen des Agents de Surface
ECOSOL European Centre of Studies on LAB/LAS

Water, paper and oil treatment chemicals

ACPA Activated Carbon Producers Association
CEEP Centre Européen d'Etudes des Polyphosphates
CEES Centre Européen d'Etude des Silicates
Cellulose Ethers
CEPAD/EBPP Conseil Européen des Phénols Alkylés et Dérivés
EAC European Aminocarboxylates Committee
EUZEPA European Zeolite Producers Association
INCOPA Inorganic Coagulants Producers Association
Peroxygens
Persulphates
QUAS Quaternisation of Starch Producers Association
Sodium Chlorate

Food and Protective applications

Food and Feed

Carbohydrates
ECAMA European Citric Acid Manufacturers Association
FRP Food Regulations Panel
GME Gelatin Manufacturers of Europe
IFP Inorganic Feed Phosphates
PAPA (EFPA /EPPAA) Phosphoric acid and food phosphates

Fine Chemicals

APIC Active Pharmaceutical Ingredients Committee
EFCG European Fine Chemicals Group

Biocides

EBPF European Biocides Products Forum
PAR Peracetic Acid Registration
Sodium Chlorite BPD Registration Group

Petrochemistry / APPE

APPE Association of Petrochemicals Producers in Europe
Acrylonitrile
AGU Automotive Grade Urea
Alkylamines
Amines Amines Sector Group
APA Aromatics Producers Association
ASG Acetyls Sector Group
ATC Technical Committee of Petroleum Additive Manufacturers in Europe (Affiliated Member)
BDO & Derivatives
CCSG Coal Chemicals
EBAM European Basic Acrylic Monomer Group
EFOA European Fuel Oxygenates Association
EPRA European Phenolic Resins Association (Affiliated Member)
ESIG European Solvent Industry Group
Ethylene Oxide & Derivatives Producers Association
HSPA Hydrocarbon Solvent Producers Association
LOSG Lower Olefins Sector Group
MSG Methacrylates Sector Group
Methanol
OSPA Oxygenated Solvent Producers Association
PO & Glycols Propylene Oxide & Glycols Sector Group
PPA Phenol Producers Association
SPA Styrene Producers Association

Plastics / PlasticsEurope

PlasticsEurope
Styrenics
Expoxy Resins, Fluoropolymers, PC BPA, PET, Polyolefins, Styrenics, Vinyls

Halogens / Euro Chlor

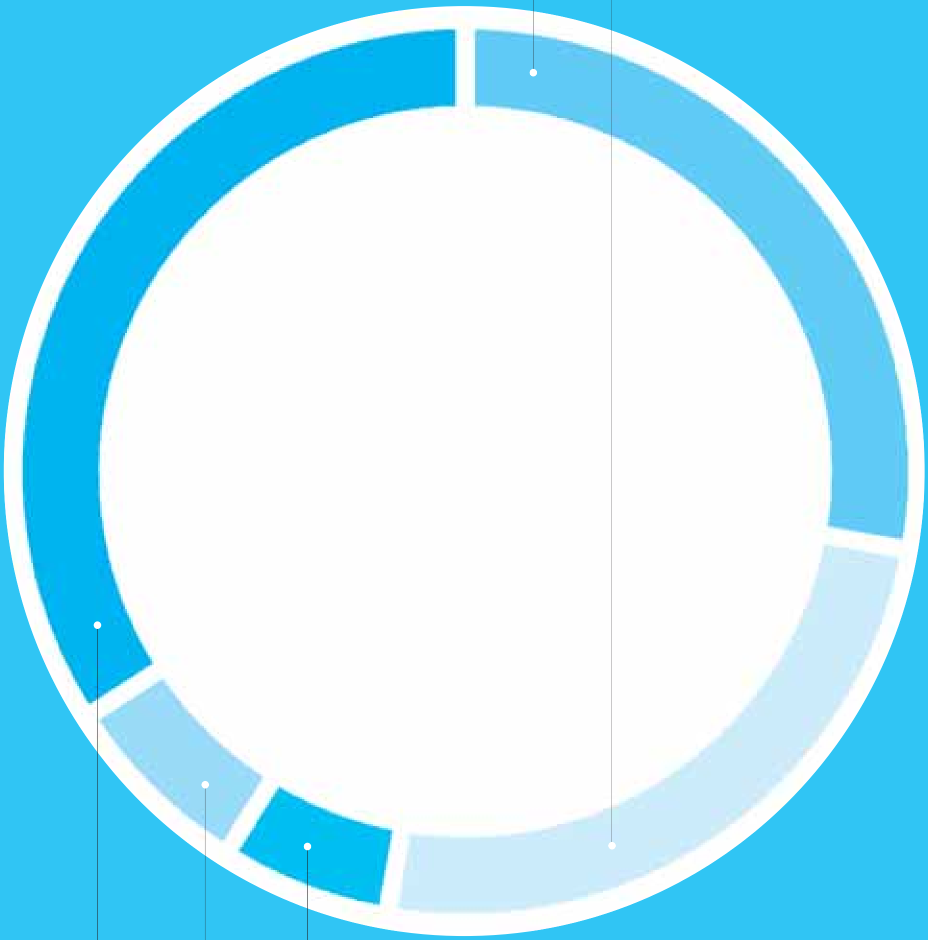
Euro Chlor
Chlorinated Paraffins Sector Group
ECSA European Chlorinated Solvent Association
Potassium Working Group
CTEF Comité Technique Européen du Fluor
EFCTC European Fluorocarbon Technical Committee
EMBA European Methyl Bromide Association Fluorspar
GFPF Global Fluorcarbon Producers' Forum
ESA European Sulphuric Acid Association
Fluorspar

Financial report 2007

Split of expenses by activity and income flow.
Based on actuals 2007 (in millions €)

ABM & ACOM Financing

28% Sector Groups Research - 13.2
25% Sector Groups Management - 11.4



Policy Centre & LRI financing

34% Policy Centre - 15.9
7% LRI Projects - 3.4
6% Services - 2.6

AFEM 15%
ACOM 58%
ABM 6%
Sales 21%

Cefic's actual expenses totalled € 46.7 million in 2007.

The expenses are split into the following categories:

- € 15.9 million for Policy Centre activities. Expenditures covered the following Cefic Programmes: International Trade, Energy, HSE & Logistics, Product Stewardship (including REACH-related activities), Research & Innovation, Build Trust, Legislation & Advocacy. They also included central management costs (DG and office of DG, business development).
- € 2.6 million for Services activities, covering Finance & Accounting, Human Resources, Events, Information Technology, Office Management & Archiving.
- € 3.4 million for LRI Research Projects.
- € 11.4 million for running expenses of sectoral activities. This covered the Industry Sectors: Petrochemicals, Euro Chlor and Fine Specialty & Consumer Chemicals.
- € 13.2 million in research costs related to sectoral activities.

On the income side, the horizontal Programmes Councils and science budgets were mainly covered by fees paid by national federations (AFEM) and major companies (ACOM.)

Non-ACOM companies participating in sectoral activities (ABM) also contributed to in the financing of the horizontal part by paying a fee to Cefic on top of the sectoral budgets. These fees totalled € 1.1 million in 2007.

Actual expenses and income 2007
(in thousand €)

Expenses	Actuals 2007 Policy Centre/Services/ LRI Research Projects	Actuals 2007 Sectoral activities	Totals 2007
Labour	9,649	6,391	16,040
Office	1,577	1,056	2,632
Travel	344	446	789
Meetings	1,042	1,023	2,065
Publications	211	22	233
Internal Purchasing	377	856	1,233
Management Contribution	1,679	1,313	2,993
External Contractors	6,013	13,219	19,232
External Support to Cefic	354	158	512
Others	559	246	805
Investments	86	0	86
Trainings	24	2	26
IT	22	3	26
Restructuring Expense	0	0	0
Total Expenses	**21,936**	**24,736**	**46,672**

Income			
Internal Sales	3,731	490	4,221
External Sales	1,777	919	2,696
Sectoral Contributions	0	0	0
Sectoral Variable Contribution	51	16,118	16,169
Research Funding	0	9,077	9,077
Affiliated Sectors	300	0	300
AFEM	2,486	0	2,486
ACOM	11,614	0	11,614
ABM	1,119	0	1,119
Interest	932	87	1,019
Total Income	**22,010**	**26,691**	**48,701**

Governance

Cefic is the Brussels-based organisation representing the European chemical industry.

Cefic's members are:

- Corporations with a production base in Europe and a worldwide turnover in chemicals of more than € 1 billion;
- European national federations;
- Sectoral businesses with a production base in Europe and a worldwide turnover in chemicals of less than € 1 billion.

Cefic also provides Associate and Partner status for other parties to engage in Cefic's activities in a more limited but nonetheless relevant capacity: chemical corporations with no production base in Europe may join as Cefic Associates, while other entities with a role or an interest in the European chemical sector may join as Cefic Partners. A full list of Cefic members, partners and associates is provided on page 40.

Cefic members are represented through three member assemblies – the Assembly of Corporate Members (ACOM), the Assembly of Federation Members (AFEM) and the Assembly of Business Members (ABM) – which meet once a year in a General Assembly.

The General Assembly elects the governing Cefic Board and Executive Committee for a two-year period.

The operational management of Cefic is ensured by the National Associations Board, the Industry Sectors Board and the Leadership Team, which has overall responsibility for coordinating and steering activities throughout the organisation.

Cefic Governance

The Cefic Board

The **Cefic Board** is composed of:

6 Members representing the Federations Members (AFEM)

Fernando Iturrietta (Cepsa), FEIQUE, Spain
Christian Moretti (PCAS), UIC, France
Arpad Olvaso (TVK), MAVESZ, Hungary
Wolfgang Plischke (Bayer), VCI, Germany
Feike Sijbesma (DSM), VNCI, The Netherlands
Giorgio Squinzi (MAPEI), Federchimica, Italy

6 ACOM Members, chairpersons of the Programme Councils

Ian Hudson (DuPont), PC EU Legislation and Integration
Thierry Le Hénaff (Arkema), PC Industrial Policy
Stefan Marcinowski (BASF), PC Research and Innovation
Godefroy Motte (Eastman), PC Build Trust
Sven Royall (Shell), PC Product Stewardship
Theo Walthie (Dow), PC Energy, HSE and Logistics

4 other ACOM Members

François Cornélis (Total), President
Jim Harris (Exxon)
Christian Jourquin (Solvay), Chairman of the Nomination Committee, Chair ACOM
Armin Meyer (CIBA), Chairman of the Audit and Finance Committee

4 members representing the Industry Sectors

Huub Cuijpers (Albemarle), Specialty Chemicals
Charles Laroche (Unilever), Brand Chemicals
Chris Tane (INEOS), Chlorine
John Taylor (Borealis), Plastics

3 members representing the Business Members (ABM)

Tony Bastock (Contract Chemicals), Chair ABM
Inge Pettersson (Perstorp)
Heinz Sieger (Uetikon)

The Cefic Executive Committee

The **Cefic Executive Committee** is composed of all chairpersons of programme councils, the chairs of ACOM and ABM, one board member from AFEM and from the Industry Sectors colleges and the President.

Tony Bastock (Contract Chemicals), Chair ABM
François Cornélis (Total), President
Ian Hudson (DuPont), PC EU Legislation and Integration
Christian Jourquin (Solvay), Chairman of the Nomination Committee, Chair ACOM
Thierry Le Hénaff (Arkema), PC Industrial Policy
Stefan Marcinowski (BASF), PC Research and Innovation
Armin Meyer (CIBA), Chairman of the Audit and Finance Committee
Godefroy Motte (Eastman), PC Build Trust
Sven Royall (Shell), PC Product Stewardship
Giorgio Squinzi (MAPEI), Federchimica, Italy
John Taylor (Borealis), Plastics
Theo Walthie (Dow), PC Energy, HSE and Logistics

Cefic operational bodies

The Leadership Team

The Cefic Leadership Team is composed of:

Alain Perroy, Director General
Pierre de Kettenis, Executive Director Petrochemistry
Gernot Klotz, Executive Director Research & Innovation
Joachim Krueger, Executive Director Energy, HSE and Logistics
Wilfried Haensel, Director General PlasticsEurope
Lena Perenius, Executive Director Product Stewardship
Jean-Claude Lahaut, Executive Director EU Legislation & Integration
Alistair Steel, Executive Director Euro Chlor
René van Sloten, Executive Director Industrial Policy
Daniel Verbist, Executive Director Build Trust and Communications
Roland Vos, Executive Director Services

National Associations Board (NAB)

Colette Alma - Zeestraten VNCI, Vereniging van de Nederlandse Chemische Industrie
Claudio Benedetti, FEDERCHIMICA, Federazione Nazionale dell' Industria Chimica
Stephen Elliott, CIA - Chemicals Industries Association
Timur Erk, TKSD - Turkey
Fernando Galbis, FEIQUE - Federacion Empresarial de la Industria Quimica Espanola
Jean-Claude Lahaut, Cefic
Trygve Østmo, Norsk Industri
Jean Pelin, UIC - Union des Industries Chimiques
Alain Perroy, Cefic
Stefan Petkamic, ZCHFP - Slovak Rep.
Utz Tillmann, VCI, Verband der Chemischen Industrie
Yves Verschueren, essenscia - Belgian federation for chemistry and life sciences

Industry Sectors Board (ISB)

Chantal De Cooman, Cefic
Pierre de Kettenis, Cefic
Brigitte Dero, Cefic
Wilfried Haensel, PlasticsEurope
Jean-Claude Lahaut, Cefic
Alain Perroy, Cefic
Friedhelm Schmider, ECPA (European Crop Protection Association)
Alistair Steel, Euro Chlor
Jan van der Meulen, CEPE
Susanne Zänker, A.I.S.E.

Corporate members (ACOM)

Air Products, Akzo Nobel, Albemarle, Arch Chemicals, Arkema, BASF, Bayer, Borax, Borealis, BP, Celanese, Chemtura, Chevron Phillips Chemicals, Ciba, Clariant, Cognis, Dow Corning, Dow Europe, DSM, DuPont de Nemours International, Eastman Chemical, Evonik Industries, ExxonMobil Chemical Europe, FMC Foret, Hercules International, Honeywell Belgium, Huntsman, INEOS, Kemira, Lanxess, Lubrizol, Lucite International, LyondellBasell, MAPEI, Novartis International, OMV, Polimeri Europa, Procter & Gamble, Repsol – YPF Quimica, Rhodia, Rohm and Haas, Sabic Europe, Shell Chemicals Europe, Solutia Europe, Solvay, Sumitomo Chemical, Total, TVK, Unilever, Wacker – Chemie

Federations members (AFEM)

National federations Austria – FCIO - Fachverband der Chemischen Industrie Österreichs, Belgium – essenscia - Belgian federation for chemistry and life sciences, Czech Republic – SCHP - Svaz chemického prumyslu Ceské republiky, Denmark – PIBF - Procesindustriens Brancheforening, Finland – KT RY - Kemianteollisuus ry, France – UIC - Union des Industries Chimiques, Germany – VCI - Verband der Chemischen Industrie, Greece – HACI - Hellenic Association of Chemical Industries, Hungary – MAVESZ - Magyar Vegyipari Szövetség, Ireland – PharmaChemical Ireland, Italy – FEDERCHIMICA - Federazione Nazionale dell'Industria Chimica, Netherlands – VNCI - Vereniging van de Nederlandse Chemische Industrie, Norway – NI - Norsk Industri, Poland – PIPC - Polish Chamber of Chemical Industry, Portugal – APEQ - Associação Portuguesa das Empresas Químicas, Slovak Republic – ZCHFP - Zväz chemického a farmaceutického priemyslu Slovenskej republikỳ, Slovenia – CRA - Zdruzenje kemijske in gumarske industrije, Spain – FEIQUE - Federación Empresarial de la Industria Química Española, Sweden – Plast- & Kemiföretagen, Switzerland – SGCI Chemie Pharma Schweiz - Schweizerische Gesellschaft für Chemische Industrie, Turkey – TKSD - Turkiye Kimya Sanayicileri Dernegi, United Kingdom – CIA - Chemical Industries Association

Associate national federations Bulgaria – Branshova Kamara na Turgovskite Drujestva ot Chimicheskata Promishlenost, Croatia – UKI - Association of Chemical Industry/Udruzenje Kemijske Industrije, Estonia – Eesti Keemiatoostuse Liit, Latvia – LAKIFA - Association of Latvian Chemical and Pharmaceutical industry, Lithuania – Lietuvos Chemijos Pramones Imoniu Asociacija, Romania – FEPACHIM - Romanian Federation of Chemical and Petrochemical industry

Business members (ABM)

AarhusKarlshamn, Abbott Laboratories, Abitec, Abwassertechnisches Beratungs-und Servicebüro Steding*, Activa, Adisseo, ADP-Adubos de Portugal, A-Esse, Agriphar, Agrolinz Melamin Italia (AMI), Ajinomoto Eurolysine, Ajinomoto Foods, Ajinomoto OmniChem, Aktivsauerstoff, Alberdingk Boley, Albion Inorganic Chemicals, Alcan Speciality Aluminas Europe, Alkim Alkali Kimaya, AllessaChemie, Alpharma, Alufluor, Ambrogio Pagani, Amcol Specialty Minerals, Amcor Flexibles Europe, Amino, Aragonesas Industrias y Energia, Areva, Arizona Chemical Company, Arran Chemical Co., Arsol Aromatics, Asturiana de Zinc, Asua Products, Atlantic Copper, Austrotherm, Axens, Azomures, Babolna Bio, Bactria, Baerlocher, Balchem Corporation, Baxter SQA Europe, Befesa Desulfuración, Befesa Zinc Sondika, Belinka Perkemija, Bell Laboratories, Bentec, Berzelius Stolberg, Bilbaina de Alquitranes, BIM Kemi, Bioxal, BK Giulini, Bluestar Silicones, Bochemie, Bode Chemie, Boehringer Ingelheim Pharma, Boliden, Borregaard, Bracco, Brüggemann Chemical, Brunner Mond, Buckman Laboratories, Byk Chemie, Cabot, Caldic Chemie, Cambrex Karlskoga, Campine, Carbogen AMCIS, CarboTech, Cargill, Casco Adhesives, Catalyst Recovery Europe (Porocel), Celgene Chemicals, CEPRO*, CEPSA Química, Chemagis, Chemial, Chemifloc, Chemische Fabrik Budenheim, Chemische Fabrik WIBARCO, Chemko, Chemson, ChemTrade Roth, Chemviron Carbon, Chevron Oronite, Chimica Dr. Fr. D'Agostino*, Christeyns, Ciech, Cilag, Cindu Chemicals, Cinkarna, CIPAN, Climax Molybdenum, Co.ge.fin, Cognis Oleochemicals, Colorobbia Italia, ConocoPhillips, Contract Chemicals, Coplosa, Cordenka, CP KELCO, Crimidesa, Croda International, CU Chemie Uetikon, CWK Bad Köstritz, Cytec Industries, Dabeer, Danisco, De Craene, Delamine, Derivados Del Fluor, Desotec, Deza, Diamantino Malho & Cª*, DOMO Caproleuna, Donau Carbon, Donau Chemie, Draslovka, DRT, Dynea, DyStar, E.R.C.A.*, Ecofuel System, Ecogreen Oleochemicals, Ecolab, EGIS Pharmaceuticals, Eigenmann & Veronelli*, Electroquímica de Hernani, Elementis, Eli Lilly & Company, Eliokem, Endura, ENI, EOC, Ercros, ERG Raffinerie Mediterranée, Ertisa, Esco (European Salt Company), Española Del Zinc, Esterchem, Esteve Química, Eurecat, Euro Yser Productos Químicos, Eurobrom, European Colour, Ewald Gelatine, Faci, Farcoll-Fabbrica Resine Collanti, Feralco, Ferro, Fertiberia, FINSA-FORESA - Industrias Quimicas del Noroeste, Floridienne Chimie, Fluorchemie Dohna, Forchem, Gaba International, Gadot Biochemical Industries, Galactic, Galp Energia SGPS, Gaschema, Gattefosse*, GE Healthcare, GE Betz, Gelatines Weishardt, Gelita, Givaudan, Glebe Mines, Grace, Grillo-Werke, Grillo Zinkoxid, Grindeks JSC*, H. Lundbeck, Haldor Topsoe, Hamm Chemie, Hebron, Hellenic Petroleum, Hentschke & Sawatzki Chemische Fabrik, Hexion Specialists Chemicals, Hovione FarmaCiencia, Hypred, Igcar Productos Químicos, INDAL, Industrial Química del Nalón, Industrial Química Lasem, Industrias Químicas Associadas, Industrias Químicas del Ebro, IQESIL, ISOCHEM, ISP Marl, Italgelatine, Italmatch Chemicals, IZOCAM, J.M. Huber, Jackon Insulation, Janssen Pharmaceutica, Johnson Controls Hybrid and Recycling, Johnson Matthey Macfarlan Smith, Joseph Storey & Co., Juncá Gelatines S.L.V., Jungbunzlauer, KAO Corporation, Katwijk Chemie, Kemfine Group, Kiilto, Knauf, Kodak Polychrome

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* Awaiting Board approval

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