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where chemistry meets life sciences



Peer Review on “The organisation, outcomes and effectiveness of social dialogue”

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chemical & life sciences industries

23 /10/2018



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The Belgian chemical and life sciences industry is world-class

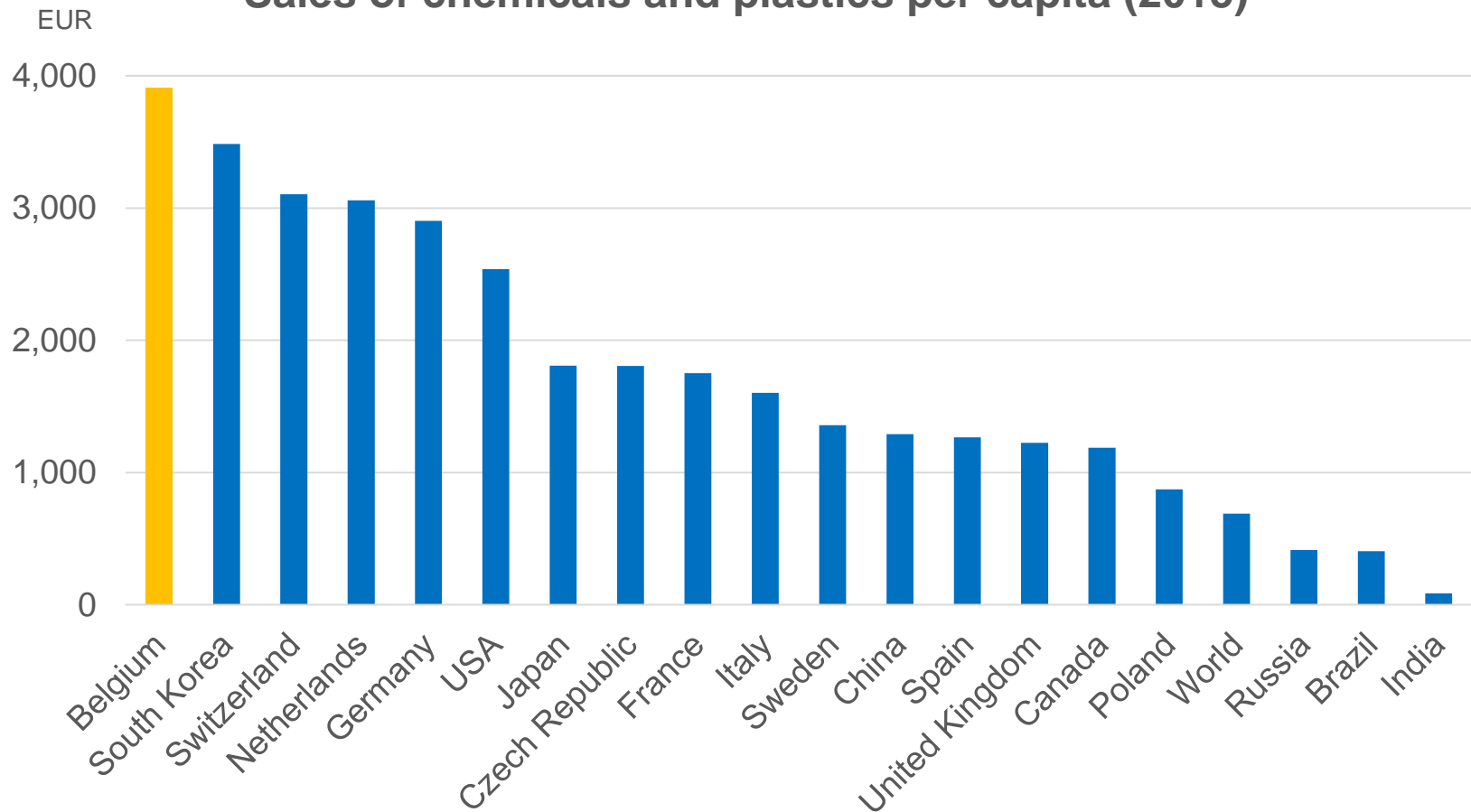
Belgium is the n°1 chemical country in the world on a per capita basis



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Sales of chemicals and plastics per capita (2015)



Source: Feri

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

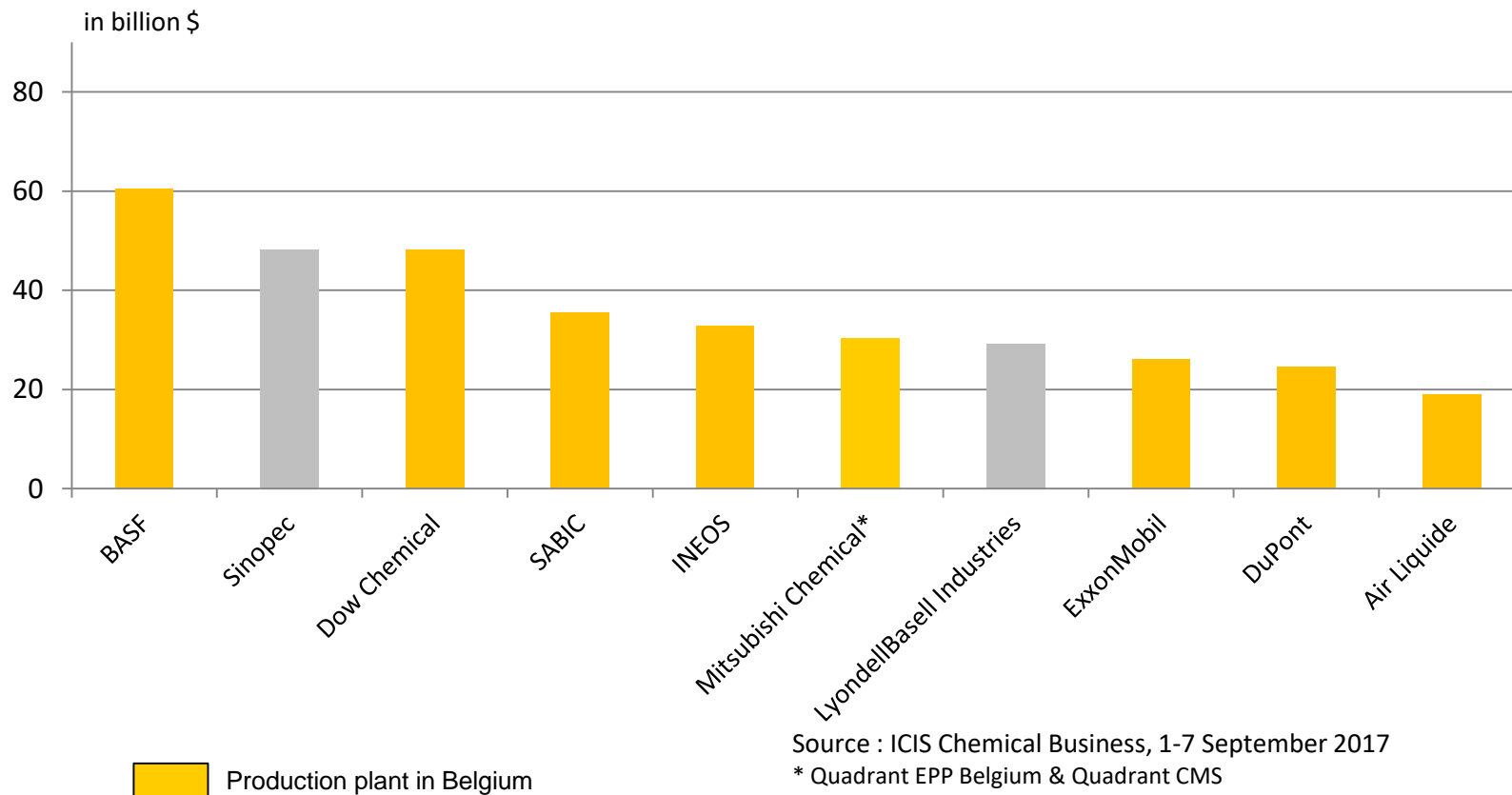


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8 out of the top 10 chemical companies have production sites in Belgium

Top chemical companies (2016 sales)



Belgium hosts one of the largest chemical clusters in the world



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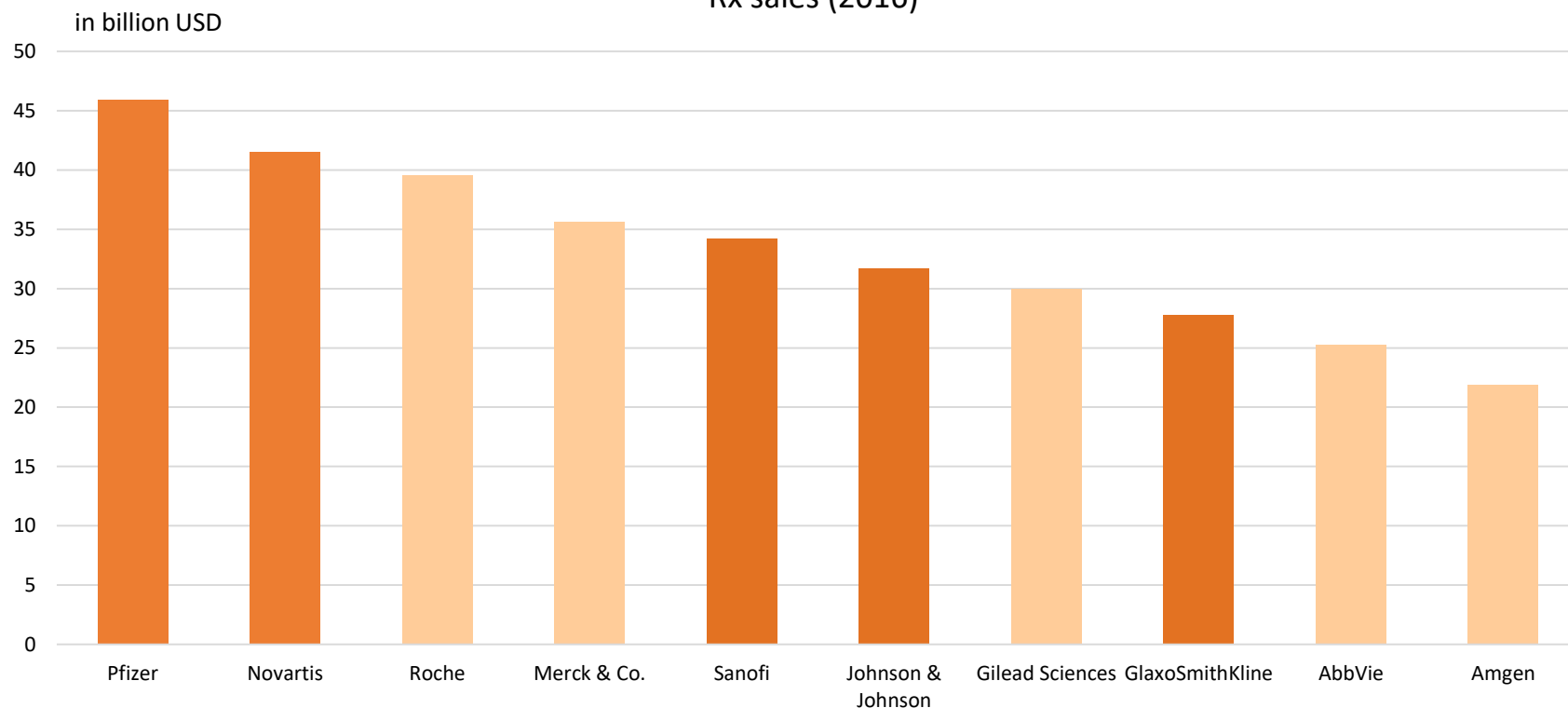
All top 10 global biopharmaceutical companies have key activities in Belgium




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Top 10 biopharmaceutical companies worldwide
Rx sales (2016)



 Major production facilities and R&D activity in Belgium

 Clinical trial activities and sales office in Belgium

Chemistry and life sciences in Belgium, a major economic player (KEY FIGURES 2017)



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Turnover	€ 65.8 billion
Direct employment	90,780
Indirect employment	150,000
Investments	€ 2.17 billion
R&D expenditures	€ 4.4 billion
Export	€ 120 billion
Trade surplus	€ 23.7 billion
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A growing sector



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	Share of manufacturing industry	Growth compared to 2010	
Employment	1/5	+1,7%	↗
Exports	1/3	+14%	↗
Value added	1/3	+17%	↗
Turnover	1/4	+18%	↗
Investment	1/3	+61%	↗
R&D Expenditure	>1/2	+76%	↗
Number of patents	1/3	+85%	↗

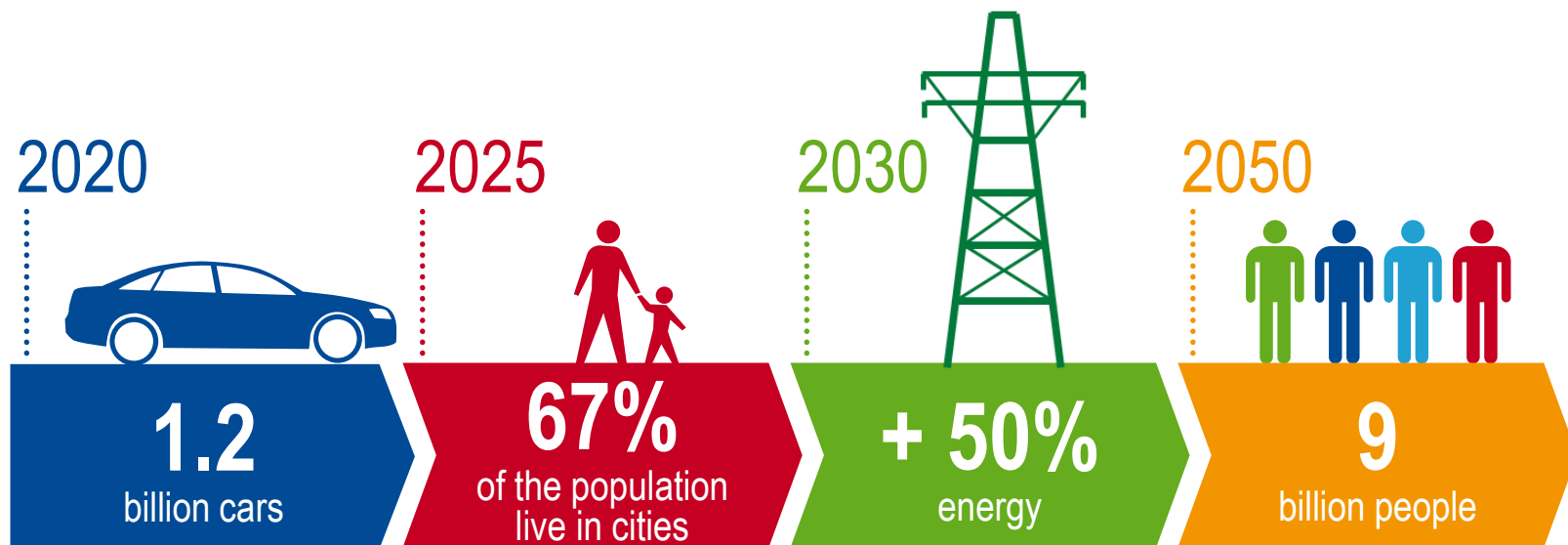
Source: ONSS, AD Statistics, NBB (value added based on ESA 2010), Belspo (according to product group) and essencia survey, EPO
 Figures 2017, excluding value added (2016)
 Essencia analysis



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Megatrends lead to new market opportunities



Solutions come from chemistry and life sciences



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Energy saving innovations: insulation in buildings, lighter plastics in cars for less fuel consumption, ...



Diversifying raw materials: materials for renewable energy, bioplastics, ...



Food: fertilisers for higher crop yields, GMO's, plastics packaging for better preservation, ...



Improving water quality: plastic piping for zero water loss, water treatment, ...

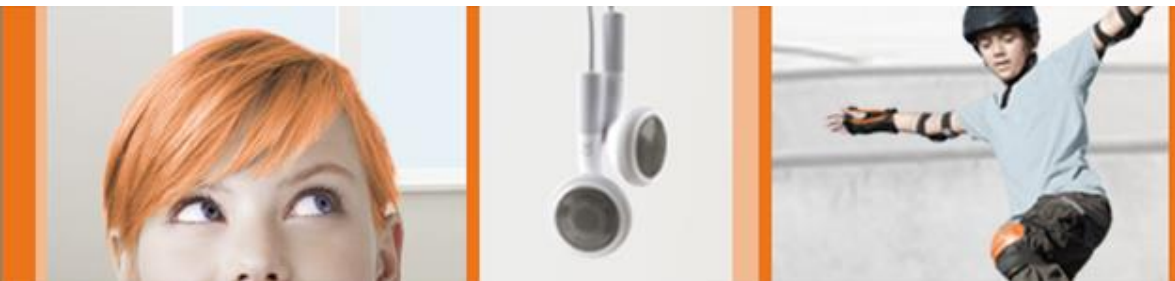


Health: vaccines, medicines, personal care products, ...



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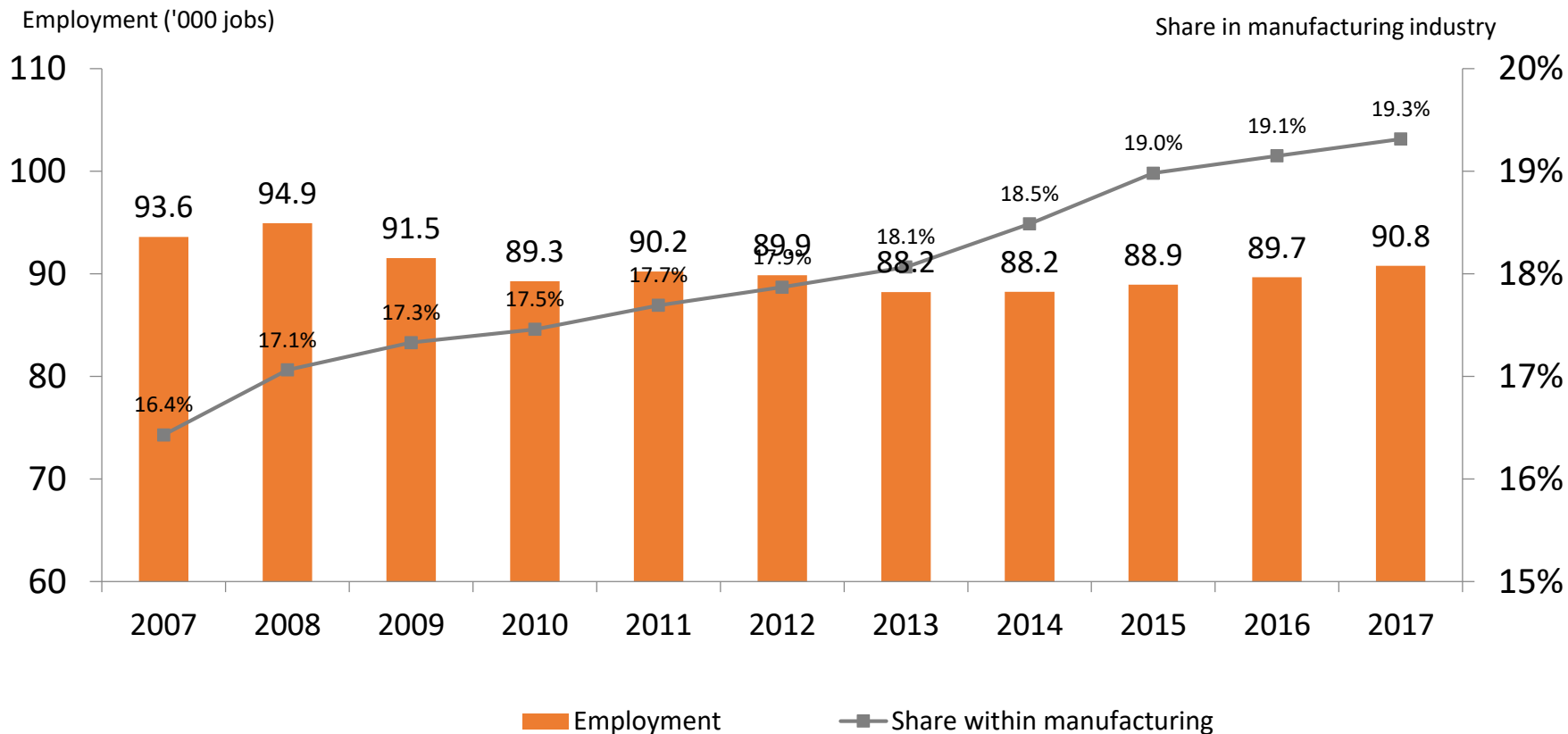
Our workforce



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A top employer with steady job growth





Social Dialogue: 3 key factors



TRUST



COMPETENCE



LEADERSHIP



TRUST

Government

Social Partners

- Respect role of social partners
 - Foster interdependence
 - Clarify future rights & obligations
- Respect the government
 - Agreements first
 - Pacta sunt servanda



COMPETENCE

Government

- Macro economics
- Macro guidelines

Social Partners

- Micro economics
- Tailor made measures



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LEADERSHIP

Government

Social Partners

- LT objectives

- Pacta sunt servanda



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Belgian Federation for Chemistry and Life Sciences Industries

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