

NOVEMBER 2017

CIA | Chemical
Industries
Association

Working for chemical and
pharmaceutical businesses

Your voice
Your expert source of advice
and support



Come and join us

The Chemical Industries Association is a membership organisation, funded by subscription from our members. We have 250 member companies operating 200 production sites with 100 sales and research centres. Our membership ranges from major chemical and pharmaceutical multinationals operating in the UK to an increasing number of SMEs. The governance and policy of the Association is set by our Board and Council, elected from our member companies. Our operational priorities are agreed and worked by members through strategy groups, issue teams and networks of expertise. All of the work undertaken by Association staff is totally focused on meeting the needs of our member companies.

What our members say about us

"Let me assure you that the Chemical Industries Association will not just focus on Brexit – as important as it is – but we will continue to fight on any business issue affecting our industry to secure the most competitive business framework possible as the UK prepares for the challenges that lie ahead. Together our voice will be heard."

Tom Crotty, President, Chemical Industries Association, Director, Ineos

"Small companies in the chemical sector are the engines of growth and innovation for British industry. The Chemical Industries Association advises Government on policies that allow the UK to continue investing to expand our manufacturing base and to facilitate free and fair access to our EU markets following Brexit."

Dr Tony Bastock OBE, Chairman, Contract Chemicals Ltd

"The work of the Chemical Industries Association is vital to securing the long term growth of the UK's chemical sector. Its work benefits all UK chemical and pharmaceutical companies and warrants the support of every business in achieving its goals."

Jim Ratcliffe, Chairman, Ineos

"From multinationals to SMEs, the CIA is the essential partner for every chemical business in the UK."

Calum MacLean, Chief Executive, Synthomer plc

"As a UK-based multinational employer, the Chemical Industries Association is a vital partner in our UK and European business."

Steve Foots, Chief Executive, Croda International plc and Co-Chair of the Chemistry Growth Partnership

"CIA membership brings access to a wide range of services which we find really valuable in supporting our active pharmaceuticals manufacturing business."

Dave Tudor, Vice President, Strategy and Global Logistics, GlaxoSmithKline plc

"As an SME the advice and support that is provided by the CIA is invaluable to the running of our business. We simply don't have the time or resources to gather much of the vital information that the CIA provides."

Harry Swan, Managing Director, Thomas Swan & Co Ltd

"The Chemical Industries Association allows our sector a significant opportunity to work with Government in securing the best Brexit deal for the UK"

Richard Carter, Managing Director UK & Ireland, BASF



A personal message from the Chief Executive of the Chemical Industries Association, Steve Elliott

The Chemical Industries Association (CIA) is the organisation that represents chemical and pharmaceutical businesses throughout the UK. We represent all sizes of chemical and pharmaceutical businesses.

Our activities are split between influencing the policy agenda and the provision of advice and services to our members. Our policy agenda stretches across the economy and competitiveness; energy and climate change; our products and the way we work; health, safety & environment and employment issues. Our staff, located in Westminster, are recognised as national and international experts on these issues.

We take the issues that matter to our members and campaign at the UK and EU level to ensure that industry is able to operate safely, profitably and with due care for the interests of future generations.

In this publication we show the areas we work on for our member companies.

Steve Elliott
Chief Executive, Chemical Industries Association

Features and benefits

- You are being represented at the highest level in Government through our highly active lobbying and policy experts
- CIA and CIA members are recognised as constructive, pragmatic, responsive and competent through their engagement with authorities on existing regulations
- You understand and influence what is coming down the road (UK, EU and Worldwide)
- Keeping you up-to-date with UK/EU regulations relevant to your organisation
- **Get heard** – our highly effective activities offer the best way for your views to get heard
- **Get involved** – join one of our highly active issue teams to influence the latest policy development
- **Stay legal** – with early warnings of compliance and on-going regulation changes
- **Access practical advice and support** – what new regulations mean for your organisation and what you need to do
- **Industry experts** – give complete support and advice
- **Government relations** – contacts and networks give you the inside track
- **Access to information** – always of the highest quality and you will hear about it from us first
- **Supply chain engagement** – successful dialogue with other sectors
- **Stay engaged on Brexit** – to influence the future of chemical policy in the UK and be prepared for the challenges ahead.

Brexit and its impact

On 23 June 2016 the country voted to leave the European Union. Just before the referendum we surveyed our member company Chief Executives, all of whom wanted the UK to remain. 63% of companies in the sector export what they make to the world, the highest proportion of any goods manufacturing sector in the UK economy. 60% of our exports go to the European Union and 75% of our imports and raw materials come from the European Union. As a trading partner, Europe matters. One week after the vote, our Council authorised a press release saying the vote had happened and it was now important that the country worked on getting the best possible future arrangements with the European Union which included a tariff-free access to the single market, availability of skilled people, supply of competitive and secure energy and a science-friendly policy framework that encourages innovation and growth. This was picked up by the BBC.

In the Autumn of 2016 we held our annual business conference devoted to Brexit. Speakers included Brexit Minister Robin Walker, Ineos Chairman Jim Ratcliffe and Political Editor of the Financial Times George Parker.

The CIA conducted its first Brexit survey in November 2016, which collected detailed responses on the potential impact of Brexit on trade, skills, energy and innovation. The survey reaffirmed the importance of the rest of the EU as a market for UK manufactured chemicals and pharmaceuticals and even more important as a source of raw materials and intermediate inputs to production. Responses indicated that the impact of tariffs on UK-EU exports and imports will be significant and in some cases would lead to a reduction in UK manufacturing activity. The inclusion of non-tariff costs would increase the impact. The industry indicated that access to skills from non-UK EU citizens were important, particularly in specialist science-type roles. Maintaining access to the European energy market is important, as is finding an effective but lower cost alternative to the EU Emissions Trading Scheme. Brexit will impact on R&D spending in the UK but Government policies like increased fiscal incentives could help to mitigate the impact. In addition, better risk-based regulation and a successful Industrial Strategy after Brexit could improve the competitiveness of UK manufacturing.

JULY 2017

CIA Chemical Industries Association

Working for chemical and pharmaceutical businesses

The Chemical Industry – Brexit priorities for UK growth

Your chemical industry
Every successful economy has a strong manufacturing base, with a chemical sector at its heart. The chemical industry is an important part of the economic and environmental life of the UK. The products and technologies of chemical companies are used in a wide range of many other sectors which are vital to the UK economy such as aerospace, automotive, pharmaceuticals – we are the 'industry of industries'. 60% of chemical exports are destined for the European Union (EU), whilst 75% of chemical imports, many of which are essential raw materials, arrive from the EU. Our country's exit terms from the EU are, therefore, critically important for our sector.

Making Brexit work
It is time to reposition the UK's approach to Brexit, encouraging greater predictability for business and employment during the inevitable transition period before leaving the EU. More specifically, we believe that staying in the single market for that appropriate transition period would help support trade, investment, jobs and overall economic growth in the critical time taking us to exit from the EU and our future new trading relationship. In leaving the European Union we would stress three key priorities that must be secured to ensure that success:

1 Frictionless tariff-free trade

With 60% of UK chemical exports destined for the European Union and 75% of chemical imports coming from the European Union the imposition of tariffs and related non-tariff barriers will negatively impact trade in both directions, especially exports as most value added activities are subject to higher tariffs than raw materials.

- Maintain tariff-free access to the single market, including EU trade deals.
- Avoid border controls for the movement of products as these will cause additional delays, wastage and cost for businesses, governments and consumers.
- Minimise disruption to established supply chains for both UK and continental European chemical businesses and their customers.

2 Regulatory consistency

The chemical industry is highly regulated as we need to give confidence to communities around our plants and the consumers of our products. In leaving the EU we do not argue for lower regulatory standards but regulatory consistency and continuity in many areas, to ensure continued access to the market place.

- Develop a UK alternative to the European Union Emissions Trading Scheme that not only delivers CO₂ emission reductions but supports the ability of UK chemical businesses to compete on a global basis.
- Secure access to the EU market place by remaining as close as possible to the existing REACH regime, ensuring any post-Brexit future protects UK industry's existing compliance commitments, avoids duplication of cost and assists our ability to negotiate other free trade deals.
- Retain a risk-based approach to industrial emissions regulation, working with the UK Government and regulators to deliver an outcome that protects both the environment and competitiveness.

3 Access to skilled people

Chemical businesses rely on skilled people. Some of the specialist skills required are not yet available in the UK. We need to achieve as near as practically possible freedom of movement for certain jobs within the overall workforce. Getting the best can help secure employment for the rest.

- Allow chemical businesses to bring in specialist contractor teams for a limited period to undertake essential maintenance and overhaul activity in shutdown and turnaround situations.
- Agree to scientists who are employees of companies moving freely between the EU and UK. Chemical businesses need scientists and engineers. Movement of scientific and engineering skills around companies delivers growth.
- Ensure multi-national companies can move their staff – particularly graduate and management trainees – between different countries to gain experience and develop skills. Brexit should not stand in the way of development experience.

The UK Chemical Industry – what we do
The products and services of our companies can be found in every area of life from vital medicines, water treatment, food and clothing, through housing, many everyday goods and transport to communications and leisure activities. Our industry is at the forefront of providing solutions to current challenges on issues such as climate change through fuel cells and insulation of buildings. The chemical industry:

- Contributes **£60 million** a day to the UK economy, equivalent to **£15 billion** per year
- Spends **£4.4 billion** each year on investment in buildings, vehicles and machinery
- Invests almost **£5 billion** each year on research and development
- Manufactures products and technologies that are delivering a green economy, including delivering **twice** the carbon saving for society compared to what we use
- Employs about **500,000** people – directly and indirectly – with pay around **30%** higher than manufacturing generally
- Is one of the UK's largest exporters.

FOOD



R&D



AUTOMOTIVE



PHARMACEUTICALS



AEROSPACE



Our Brexit team
STUART ARNOTT – President Global Operations, Croda International plc
MARTIN ASHCROFT – Managing Director, Tata Chemicals Europe
TONY BASTOCK OBE – Chairman, Contract Chemicals Limited
DEBBIE BAKER – HR and Public Affairs Director, CF Fertilisers
RICHARD CARTER – Managing Director, BASF UK and Ireland
TOM CROTTY – Director, INEOS Group

MELVIN DAWES – Country Manager, UK and Ireland, Solvay
ANDREW JONES – President UK, Ireland and Nordic, Dow
CALUM MACLEAN – Chief Executive, Synthomer plc
ROBERT MACLEOD – Chief Executive, Johnson Matthey plc
DAVE TOPLIFFE – Manufacturing Manager, Shell Chemicals UK
DAVE TUDOR – Vice President, Strategy and Global Logistics, GlaxoSmithKline

Our offer
Our team of chemical business executives and technical specialists led by our President, Tom Crotty, and Chief Executive, Steve Elliott, will continue to work our issues; our companies stand ready to help Government with any information or input it needs for the negotiations and post-Brexit life.



Steve Elliott – Chief Executive, Chemical Industries Association



Tom Crotty – President, Chemical Industries Association

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In January 2017 the Prime Minister, during a key speech at Lancaster House, set out the Government position on the UK's future relationship with Europe. The UK would not seek Single Market membership nor would the UK look to be part of the Customs Union. Citing that both options would restrict our freedom to pursue global trade deals. In her speech she noted the chemical and pharmaceutical industry as a significant European player. January also saw publication of the Government's intentions in respect of an industrial strategy. CIA published a new Brexit position of needing Tariff-free access to the single market/Prevention of non-tariff barriers to trade, Regulatory consistency/continuity and Access to appropriately skilled people. Science policy and energy were to be picked up in our industrial strategy work.

The CIA conducted a second Brexit survey in March 2017 which asked additional and detailed questions on trade and supply chains, customs barriers, skills, regulation and innovation. The survey was done at the request of UK Government officials as they prepared for the upcoming Brexit negotiations. The details of the survey provided a unique insight for discussions with Government.

In March 2017 the Prime Minister wrote to the President of the European Union officially confirming the UK would be leaving the EU (triggering Article 50) starting the two-year divorce process. Following further discussions and meetings with Government, CIA developed the Brexit approach further by setting out arguments for Frictionless tariff-free trade, Regulatory consistency and Access to skilled people. We also publicly called for the criticality of transition period beyond March 2019 with nothing changing during that transition.

During the summer of 2017 Government published position papers (the purpose of which is to publicise their stance at negotiations) and 'future partnership' papers (the purpose of which is to set out the relationship they want with the European Union following the negotiations). CIA is providing feedback on all relevant issues and is in daily contact with Government. We also publically called that during any agreed transition period beyond March 2019 that the way UK companies currently trade with EU partners should be maintained. Our companies would be disadvantaged by having to change twice and it would create uncertainty for business.

In September 2017, speaking in Florence, the Prime Minister confirmed that the UK would seek a transitional period during which companies and governments across Europe could prepare for the future trading arrangement that would be agreed. During the transitional period, she thought two years would suffice, the UK hoped that existing terms of trade be maintained. The Prime Minister also said that the UK would honour financial commitments made during its period of EU membership and said no member would be out of pocket.



CIA Chemical Industries Association

Membership Policy Training and events Careers News About us

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Government making transition too complicated says top manufacturing exporter
Tuesday 15 August

Home » News » Details

All news

Media & PR enquiries:

For more enquiries please contact Simon Marsh on 07951 389197
simon@cia.org.uk

Press Release

One of the UK's top manufacturing exporters has criticised the Government for making the full transition to Brexit unnecessarily complex. The chemical and pharmaceutical industry, whose wider activities (manufacturing plus distribution) is the largest exporter of manufactured goods with annual exports of close to £50 billion, has questioned the value of an interim customs union.

Speaking on publication of the Government's plans for a customs union, the Chemical Industries Association (CIA), whose members include some of the nation's biggest chemical and pharmaceutical companies, said: "cross-Government acceptance of the need for a transition period is very much welcomed by our sector and many others – it's a priority that CIA has been highlighting for some time now. Surely, however, the best way to guarantee no adverse disruption to business and trade during a transition period, and to guarantee only one adjustment before reaching a final agreement with the EU, is to seek to retain our existing membership of the single market and customs union, rather than pursue a 'close association' with the customs union that still leaves key questions around regulatory continuity, tariff and non-tariff barrier impacts". Steve Elliott, the Association's Chief Executive also said "Whilst we can see the argument about the Government's latest position potentially giving us the flexibility to start negotiating other Free Trade Agreements (FTAs), the European Union market remains by far the most critical for chemical imports and exports; simultaneous negotiations on new FTAs and our future EU relationship will be inter-related and therefore incredibly complicated and it's also very possible that countries outside of Europe, with whom we seek a new trading relationship, will want to know the final new deal we secure with Europe before they agree anything with the UK".

Ends

Notes

* For an interview with/further comment from Steve Elliott please call Luke Symms on 020 7963 6791 or Simon Marsh on 07951 389197

Press Release

Speaking on publication of the Government Paper on suggestions for ensuring trade in goods and services can continue on the day the UK leaves the EU, Britain's chemical industry has supported the approach being taken. Steve Elliott, Chief Executive of the Chemical Industries Association said "I think the Government is taking exactly the right approach in this area, acknowledging the need for chemical businesses to be reassured that significant regulatory commitments and related costs, such as those already undertaken under REACH, will remain valid after exit from the EU. The approach outlined by Government confirms where businesses have undertaken compliance activities prior to exit, they should not be required to duplicate these activities in order to place goods on the UK and the EU market after exit. This includes recognising the validity of type approvals, certificates and registrations issued prior to exit".

Elliott continued "with 60% of our exports going to the European Union and 75% of our imports coming from the EU27, it is absolutely essential that UK chemical businesses can continue to trade both finished goods and raw materials without any disruption during an appropriate transition period with the EU. Furthermore we do need to take account of the relationship post-transition and these current discussion should prepare for that. Accepting the ongoing validity of all pre-departure registration activities marks a significant step in securing that outcome".

Ends

Notes

- For an interview with/further comment from Steve Elliott please call Luke Symms on 020 7963 6791 or Simon Marsh on 07951 389197
- The Association has member companies located across the UK. Our members are chemical and pharmaceutical businesses.
- Our industry is one of the UK's top manufacturing exporters.
- The chemical and pharmaceutical industry adds £14.4 billion of value to the UK economy every year from total annual turnover of over £40 billion. This represents around 10% of the value added by the whole of UK manufacturing.
- In addition to gross value added, the sector also contributes to the UK economy in its position at the head of many supply chains within manufacturing and its employment of a well remunerated, high-skilled workforce. Chemical manufacturing adds £9 billion in gross value added annually and pharmaceutical manufacturing £5 billion.
- UK chemical and pharmaceutical companies invest around £4 billion in capital and R&D.
- The wider chemical and pharmaceutical sector (manufacturing plus distribution) is the largest exporter of manufactured goods with annual exports of close to £50 billion. The export of motor vehicle, trailers and semi-trailers is the sector with next highest exports of £35 billion.
- 63% of companies in the sector export what they make to the world, the highest proportion of any goods manufacturing sector in the UK economy. 60% of our exports go to the European Union and 75% of our imports and raw materials come from the European Union.

21 Aug 2017

Make our
team part of
your team!

“Our work is totally focused on making sure your company is better able to invest and grow UK operations and effectiveness. We are fighting for chemical and pharmaceutical businesses. Join us and make our team part of your team.”

Steve Elliott, Chief Executive, CIA



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Working for chemical and pharmaceutical businesses

The voice of chemical and pharmaceutical businesses located in the UK

MAKING THE UK THE LOCATION OF CHOICE FOR CHEMICAL AND PHARMACEUTICAL BUSINESS GROWTH

The leading source of advice and support to our member companies

CHEMICALS MANAGEMENT

CLIMATE CHANGE

ENERGY

ENVIRONMENT

HEALTH & SAFETY

ECONOMICS

SAFETY AND SECURITY

TRADE

EMPLOYMENT

OCCUPATIONAL HEALTH



Eight Priority Areas

Energy

Pressing for secure and competitive supplies – on power costs we successfully lobbied directly and collaboratively, including through the press, for a scheme to compensate energy intensive businesses for policy impacts and for a freeze in Carbon Price Floor costs (worth £100m p.a.). On gas, CIA advocacy has averted levies to pay subsidy-hungry energy companies for unnecessary gas storage, and to pay consumers for renewable heat projects with unclear carbon benefits. CIA is actively supporting the market driven development of indigenous shale gas to enhance UK investability.

Climate Change

Ensuring climate policies don't leave businesses internationally exposed – CIA/CIABATA's management of the Chemical Sector Climate Change Agreement (CCA) has helped member companies to reduce electricity and gas costs by 15% (worth £70m p.a. at sector level). This is in exchange for realistic efficiency gains by 2020 – negotiated by us. When Government reviewed the climate policy mix we lobbied to avert energy tax increases which would have nullified CCA participants' savings. Other work includes lobbying for post-Brexit simplifications such as low cost alternatives to the EU Emissions Trading Scheme.



Trade

CIA coordinates UK SME participation at major international chemical fairs, e.g. CPhI Worldwide and Chemspec Europe. Both are viewed as key events but we don't overlook the US market where 20% of all UK production is sold. As an agreed partner of the Department for International Trade we can access Government financial support towards the costs your company incurs in exploring new overseas market opportunities. We are actively working with DIT to ensure that a robust framework of trade remedies (defence) is in place to coincide with the UK leaving the EU.



Health and safety

Accidents and incidents cost chemical businesses money. They can also harm our people, damage reputation, and attract attention from the regulators. Membership of CIA can help you avoid this – we have a proven track record of reducing the likelihood of incidents and other compliance failures at member sites, improving safety performance, meeting legal compliance, and managing continuous improvement. Our team of experts provide advice on process safety, health and security among other things. Through the network meetings that CIA leads our members help each other improve performance and avoid costs through Best Practice sharing, experience of engagement with regulators, and the benchmarking of performance against peers.



Employment and Occupational Health

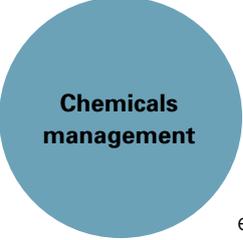
CIA represents member company views on a range of employment issues. The continued access to skilled EU workers is a key concern of companies ahead of Brexit. CIA has ensured that our member priorities are understood by the UK Government and the European Union ahead of and during Brexit negotiations. CIA has been active in advising members in relation to the Apprenticeship Levy, Gender Pay Gap and General Data Protection Regulations and we continue to advise policy developers about the impact of any additional demands on our industry. Our employment lobbying has seen changes in initial legislator proposals covering a series of different topics, saving significant sums. CIA manages a national level relationship between our member companies and the trade unions of our sector. This has produced a number of joint positions and together we have lobbied for the sector in the UK and in Europe.



Environment and Sustainability

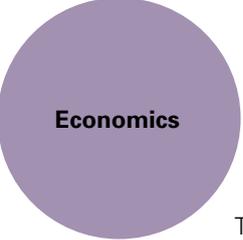
CIA works closely with the Government to influence the development and implementation of environmental policy to limit cost to business and ensure that the business remains competitive.

Our work on the Industrial Emissions Directive and the opportunity given to CIA members to actively participate to the drawing up of the BREF (Best available technique REFerence) documents which set emission limits has already helped them save £millions. We are also fully engaged in the fundamental review of the Environment Agency charging scheme for environmental permits and members are able to participate in pilot studies to help develop a fair charging scheme potentially saving them considerable amounts of money. We also cover areas such as waste, water and resource management to help improve resource efficiency e.g. we recently worked with other trade bodies to develop and published a guidance document to improve the management of packaging.



Chemicals management

Creating a regulatory framework that allows member companies to run their business in a commercially competitive environment is fundamental in establishing how we engage with Government. During the negotiations on REACH the CIA team delivered major achievements on authorisation saving companies around €50,000 per use application. And then on registration there were further savings of at least €3,800 per lower tonne substance. The team acts on the issues that matter most to member companies always looking to identify where regulatory proposals may set up a precedent of consequence that could affect a broader range of chemicals and the wider membership.'



Economics

Our sector is often misunderstood but our products and processes drive innovation and deliver real advantages to high value downstream industries and society. Therefore, we work alongside member companies to build a broad understanding of our industry's economic contribution. We contribute to ensuring a sustainable industry through the work of the Chemistry Growth Partnership (our joint industry/Government growth council) and by influencing UK Government policy through engagement on the Budget, Department for Business, Energy and Industrial Strategy's industrial strategy and Brexit. We aim to ensure continued growth in the chemical sectors' contribution of £14 billion in annual value add to the UK economy, equivalent to an impressive 10% of all manufacturing. The chemical sector is a major exporter of goods, delivering a net surplus and 140,000 people are employed in high quality well paid jobs all across the UK.



CIA Matters – our monthly magazine to member companies

Communicating to our members

www.cia.org.uk



chemical-industries-association



See_Chem_Bus



Chemical Industries Association

The Chemical Industries Association is the organisation that represents chemical and pharmaceutical businesses throughout the UK. We represent all sizes of chemical and pharmaceutical businesses and approximately 70% of our members are overseas headquartered.



Responsible Care:
continuously improving health, safety
and environmental performance

The leading source of advice and support to our member companies

CIA | Chemical Industries Association

CIABATA provides technical expertise and support as it manages the Climate Change Agreements (CCAs) on behalf of the whole of the chemical sector to deliver annual savings of around £70 million.

Working for chemical and pharmaceutical businesses

The Future Forum is a network of people working in chemical businesses located in the UK who are either at the start of their career or keen to broaden their skills and ultimately voice their opinions on behalf of the UK chemical industry.

REACHReady offers a confidential, comprehensive and cost-effective 'one-stop shop' service for REACH, CLP and BPR services.

Responsible Care is a global, voluntary initiative developed autonomously by the chemical industry for the chemical industry. It represents the chemical industry's desire to continuously improve health, safety, and environmental performance.

The Chemical Industry Awards take place each year and are awarded for technology, innovation and scientific break-throughs in this industry, in our factories, our laboratories and our offices.



Chemicals Northwest is the industry-led, chemical cluster support organisation for the £10 billion North West chemical sector, the largest in the UK.

The CIA Annual Dinner is an occasion for celebration, networking and great entertainment.

The place to go for advice on the chemical and pharmaceutical industry.

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