



Joint Statement of industriAll Europe and European Chemical Employers Group:

A competitive, safe and sustainable European chemical industry: strengthening strategic chemical sites and quality industrial jobs in Europe

Europe's chemical industry is a strategic foundation of the European economy, supplying essential inputs to industrial ecosystems ranging from pharmaceuticals, clean technologies and construction to defence, mobility, food systems and digital technologies. The sector supports millions of direct and indirect jobs, drives innovation, and is indispensable for Europe's green and digital transitions.

Today, however, the European chemical industry faces unprecedented challenges. High energy and carbon costs, global overcapacity, growing international competition, declining demand, investment leakage, geopolitical instability and regulatory uncertainty are putting Europe's industrial base under significant pressure. Recent announcements of site closures, production curtailments and restructuring measures demonstrate the urgency of coordinated action¹. Europe risks losing not only production capacity but also strategic know-how, innovation capability and quality industrial employment.

Against this backdrop, the European social partners in the chemical industry – industriAll Europe and ECEG – reaffirm the commitments outlined in our previous joint statements². We remain convinced that Europe's industrial future must be built on competitiveness, sustainability, innovation, social dialogue and quality employment.

As the European Commission advances the work of the Critical Chemicals Alliance (CCA), we call for a strong integration of the social and skills dimensions into Europe's strategic approach to chemicals. The transformation of the sector can only succeed if it supports both industrial capacity and the highly skilled workforce that makes Europe a global leader.

¹ According to the Cefic- Roland Berger study "[European chemical closures and investments radar 2022-2025](https://389cb3b2-7ba4-4acf-a332-3a5b5f2eebff.filesusr.com/ugd/977a5c_68bb3a55b7884870aeb8c3e36d808f72.pdf)" (2026), announced closures rose from 2.9 million tonnes (Mt) of annual capacity in 2022 to 17.2 Mt in 2025YTD (year-to-date), amounting to a cumulative 37 Mt over the period – approximately 9% of Europe's chemical production capacity. By contrast, confirmed investments declined from 2.7 Mt in 2022 to just 0.4 Mt in 2025YTD, equivalent to roughly 2% of European chemical production capacity. These developments are having tangible implications for employment, with an estimated 20.000 direct jobs and 89.000 indirect jobs potentially at risk across Europe.

² Joint statement "An Industrial Deal focused on ensuring quality industrial jobs in Europe", accessible at: https://389cb3b2-7ba4-4acf-a332-3a5b5f2eebff.filesusr.com/ugd/977a5c_68bb3a55b7884870aeb8c3e36d808f72.pdf.

Our shared priorities

ECEG and industriAll Europe jointly commit to promoting:

- Safe, sustainable and competitive chemical production in Europe;
- High standards of occupational health and safety across all chemical sites;
- Quality industrial jobs, fair working conditions, sustainable employment, and appropriate support for workers and companies navigating industrial transformation, including through skills development, redeployment and transition pathways, where possible;
- Investment in innovation, decarbonisation and circularity;
- Anticipation and management of industrial transformation through effective social dialogue;
- Skills development, lifelong learning and workforce resilience;
- A Just Transition that enables workers, companies, regions or value chains to adapt, innovate and thrive.

We firmly believe that industrial competitiveness and quality employment are mutually reinforcing objectives. Europe's chemical future depends on both successful companies and a skilled, motivated and resilient workforce.

Joint priorities for action

1. Include the social dimension in the Critical Chemicals Alliance

The [Critical Chemicals Alliance](#) represents an important opportunity to strengthen Europe's industrial resilience and strategic autonomy. However, achieving this objective also requires social resilience.

We therefore call for:

- Involvement of European, national social partners and representatives at company level, on the implementation of the CCA's approach to critical molecules and sites to address the socio-economic impacts;
- Systematic consideration of employment impacts, skills needs and workforce availability in strategic assessments;
- Monitoring of industrial transformation impacts on workers, regions and value chains;
- Exchange and promotion of good practices on anticipation of change, workforce transitions and industrial restructuring;

- Development of sectoral workforce intelligence and forecasting capacities³.

The success of Europe's critical chemicals strategy will depend on securing both production assets and involving the people who operate, maintain, innovate and develop them.

Adequate access to financial resources would stimulate industrial investment in innovative green and digital technologies and production methods in Europe, with guarantees to ensure the retention and creation of quality jobs, while creating the conditions for greater competitiveness and sustainable growth. Strict criteria on access to EU funds should promote a fair transformation of our industries, focusing on social cohesion, quality employment, skills and promotion of social dialogue.

2. Preserve strategic chemical sites and industrial value chains in Europe

Europe must maintain a critical mass of chemical production capacity, integrated value chains and industrial sites, in order to reduce dependencies and strengthen European economic security. Resilience should be a principle of guiding policy.

We jointly support measures to:

- Develop a robust, holistic and dynamic methodology, subject to regular review, to identify critical industrial clusters and molecules, reflecting both current strategic needs and future value chains essential for the twin green and digital transition, and incorporating socioeconomic impact of sites and molecules; consider regional employment, training provisions, specialised knowledge, supplier relationships and the importance of smaller sites for downstream value chains;
- Strengthen Europe's attractiveness for industrial investment, by recognising European Strategic Chemical Projects, and by enabling predictable long-term investment conditions that encourage companies to modernise;
- Maintain and modernise strategic production assets and industrial clusters by leveraging a greater share of national ETS funds, ensuring that EU funding supports the innovation and deployment of low-carbon technologies;
- Secure access to affordable clean energy, raw materials and infrastructure;
- Promote procurement policies that effectively support products manufactured in Europe, strengthening strategic industrial value chains, quality jobs and investment within the EU;

³ The Blueprint for sectoral cooperation, such as the [ChemSkills](#) project, represents an important instrument for forecasting skills and competence needs in the chemical sector at EU level. At national level, the social partners for the chemical sector, BAVC and IGBCE, regularly publish the big-data and AI-driven trend analysis Future Skills Report Chemistry.

- Promote lead markets, long-term industrial partnerships and Contracts for Difference to accelerate green investment, create demand for low-carbon chemicals and fairly share transition costs across the value chain;
- Ensure that European support takes cohesion into account addressing strategic chemical regions across Europe, avoiding fragmentation of the internal market and unequal access to investment;
- Promote fair international competition and effective enforcement of trade defence instruments.

Public support measures should contribute to long-term industrial activity, sustainable investment and quality employment in Europe.

3. Ensure safe chemical sites and healthy workplaces

Safety remains the sector's licence to operate and a core shared responsibility of employers and workers.

ECEG and industriAll Europe reaffirm their commitment to:

- The highest standards of process safety and occupational health and safety;
- Continuous promotion of safety culture across all chemical sites;
- Meaningful worker participation in the general organization of occupational health and safety measures in safety management systems;
- Prevention of major industrial accidents and occupational diseases;
- Protection of workers during technological, organisational and environmental transformations;
- Responsible deployment of digitalisation, automation and artificial intelligence, including early involvement of company and workers' representatives.

Continuous improvement, effective implementation and predictable regulatory framework of the REACH Regulation should contribute to ensuring that strategic industrial and geopolitical objectives do not result in a lowering of standards for workers' health, safety or environmental protection. The green and digital transitions must strengthen, not weaken, safety standards.

4. Strengthen Social Dialogue and anticipation of change

The challenges facing the chemical industry require cooperation between employers and trade unions.

We support:

- Early, meaningful and transparent information and consultation processes, according to national industrial relations systems and traditions;
- Promotion of strong industrial relations systems at all levels, respecting the autonomy of the social partners, and collective bargaining agreements as a cornerstone of the European social model;
- Full recognition of the role of social partners in managing industrial transformation;
- Improved anticipation of restructuring and skills needs;
- Support for negotiated solutions that preserve industrial capacity and employment where possible.

Effective social dialogue is a competitive advantage for Europe and a prerequisite for successful industrial transformation. The social partners believe that green and digital transitions will be most successful where competitiveness, innovation and social dialogue reinforce one another rather than being treated as competing objectives.

5. Deliver a European Skills Agenda for the chemical industry

The twin green and digital transitions are rapidly changing skills requirements across the sector. Europe must ensure that chemical companies can access the talent they need while workers can develop the competences required for future jobs.

Building on our joint STEM Strategy⁴, we call for:

- Measures to support company investments in upskilling and reskilling programmes;
- Strengthening quality apprenticeships and vocational education pathways that respond to evolving sectoral needs;
- Strong involvement of social partners in STEM, VET and skills policies;
- Effective and interoperable systems for skills recognition and portability;
- Long-term support to ensure the impact and relevance of successful sectoral initiatives such as the [ChemSkills project](#);
- Extension of the European Skills Guarantee to the chemical sector, monitoring and ensuring tangible impacts of the awarded projects;

⁴ ECEG-Ceemet-industriAll joint statement “Europe needs to make its STEM strategy a reality now”, accessible at: https://389cb3b2-7ba4-4acf-a332-3a5b5f2eebff.filesusr.com/ugd/977a5c_e13ec59a7be948478079e8931f8af5da.pdf (March 2024).

- Measures to attract women, young people and underrepresented groups into STEM careers and chemical professions.

Managers and worker representatives should be equipped with the change management skills needed to deliver successful workplace transformation through social dialogue and participation. Skills policies must deliver both competitiveness for companies and employability of workers.

6. Create a stable and coherent regulatory framework

Industrial transformation requires substantial long-term investment.

We therefore support:

- Predictable and coherent regulatory frameworks;
- Improvement of the Single Market rules by removing barriers for cross-border trade and promoting labour mobility that ensures fair treatment for all workers;
- Extensive impact assessments and competitiveness checks by the Commission when proposing new regulations including closely monitoring investment, skills and innovation capacity;
- Better alignment between industrial, climate, energy and skills policies;
- Regulatory implementation that supports innovation and competitiveness while maintaining high environmental, social and safety standards; achieved through adequately resourced authorities and clear coordinated procedures;
- Faster deployment of strategic industrial projects and infrastructure.

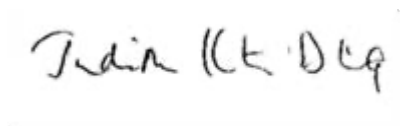
Conclusion

The European chemical industry stands at a crossroads. Europe can retain its leadership in chemicals, sustainability and innovation, but only if urgent and coordinated action is taken.

ECEG and industriAll Europe are committed to working together through the sectoral social dialogue to support a competitive, innovative and sustainable chemical industry that provides quality jobs and long-term industrial opportunities in Europe.

Ahead of the Critical Chemicals Alliance General Assembly, we call on European institutions, Member States and all stakeholders to work with the social partners in developing a comprehensive strategy that safeguards strategic chemical production, strengthens industrial competitiveness, protects workers from social and environmental dumping, advances the green transition and secures the future of Europe's workers and industrial sites.

A strong chemical industry needs strong companies, strong workers, strong social dialogue and strong industrial policies. Europe must deliver all four.

A handwritten signature in black ink, appearing to read "Judith Kirton Darling".

Judith Kirton Darling

Secretary General

industriAll Europe

A handwritten signature in black ink, appearing to read "Eleonora Isopo".

Eleonora Isopo

Director General

European Chemical Employers
Group (ECEG)