

Catalonia Connects to Chemical Industry

The chemical industry is one of the leading sectors within the Catalan and the Spanish economy

- Companies**
 There are 748 chemical companies in Catalonia, representing 2.0% of the Catalan industry and 27.4% of the chemical companies in Spain. (2015)
- Turnover**
 The chemical industry shows a turnover of €16,268M, representing 12.8% of Catalan industrial turnover and 42.6% of the entire Spanish sector (2014).
- Employment**
 The sector provides direct employment to 32,679 people, representing 8.0% of the Catalan industry and 37.1% of the chemical sector in Spain (2016).
- Exports**
 Throughout the last decade, Catalan chemical exports have represented 16.7% of Catalan industry exports and 50% of chemical exports in Spain. (2006-2016).
- R&D**
 The Catalan chemical industry showed a domestic R&D expenditure of €108 M, 11.5% of that made by Catalan Industry and 45.0% of that made by the chemical industry in Spain. (2013)
- Foreign direct investment**
 According to FDI Markets data, from 2011 to 2016, Catalonia has been the 2nd region in Western Europe in terms of job creation, and the 3rd in number of projects and capital investment in the chemical industry. Between 2011 and 2016, a total of 35 Chemical FDI projects were registered in Catalonia. This represents a capital investment of €744.04 M and the creation of 1,657 jobs. These figures account for 65.5% of capital investment into the sector in Spain, 62.1% of jobs created and 53.8% of projects. Paints and Coatings is the main subsector in terms of number of projects, and Pesticides and Fertilizers lead capital investment and jobs created.

An ecosystem of chemical companies, facilitating beneficial synergies

More than **200 international chemical companies** have their headquarters in Catalonia. This concentration of large multinationals, especially in places such as **Tarragona**, with **one of Europe's largest chemical hubs**.

Apart from the Tarragona area in Catalonia, there are other two areas to be highlighted, Barcelona and Vallès Oriental and Occidental. The high concentration of chemical companies facilitates **synergies between players**, either in terms of the provision of raw materials as manufacturers or in terms of the use of by-products or waste used as raw materials for others (circular economy).

Strategic location and transport infrastructures

The **Port of Tarragona** is specialized in the reception of chemical liquids and raw materials, and there are connections between the Port and the main companies of the chemical hub. The **Port of Barcelona** is specialized in exports of finished products. Furthermore, there are excellent connections by road and rail with the rest of Spain as well as with Europe.

Specialised logistics operators skilled in the transport of chemical products are available, working with liquid products, solids, hazardous materials, to name a few. Other service companies specialized in the chemical sector are working in areas such as engineering, maintenance, specialized waste managers, among others.



- ▶ A **qualified workforce** is available, with 6 universities offering specialised chemistry studies and 5 offering master's degrees in chemistry.
- ▶ **Technological centres and research groups** specialised in chemistry, thus facilitating R&D in Catalonia.
- ▶ Barcelona sees the celebration of **Expoquimia, Equiplast and Eurosurfas** and also the **World Chemical Summit**, a global benchmark in terms of trade fairs.



Logistics centres for chemical companies:

Catalonia offers a strategic location with two ports specialized in chemical products: **Tarragona** in terms of goods reception and liquid products and **Barcelona** in terms of global connections and specialized in containers. It also offers specialized logistics operators.

R&D centres for chemical companies:

With technological and research centres specialised in the chemical field, some companies associate in Catalonia their **productive centres with R&D centres** in order to develop new products, to find new applications, to reduce their contamination, to manufacture new materials adapted to client needs in terms of packaging or changes in legislation.



The chemical sector is tremendously active in Catalonia with **international companies** such as Kao, Merck, Sandoz, Repsol, Bayer, Dow, Solvay, Bluestar Silicones, Hempel, BASF, Henkel, Messer, Samvardhana, Akzo Nobel or Clariant, just to mention a few.

Business opportunities in the chemical sector

Catalonia is ideally prepared to welcome production plants as well as logistics and R&D centres for the following specialities:

Agrochemicals and fertilizers

Catalonia is able to attract companies that produce these specialties giving them a favorable environment with an agricultural market, the capacity to attract qualified workers, the right environment for raw material supply thanks to the business ecosystem, an ecosystem of companies, a strategic location, and great premises locations and availability of land in the Tarragona area.

Paints and Coatings

These are the companies showing greatest investment in recent years because of an availability of raw materials and a strategic location. The main sector companies are already here, and they find in Catalonia the entire market at which their products are directed.

Food Packaging

The Food & Drink sector is one of Catalonia/Spain's most important sectors. It is an exporting and dynamic sector, with companies manufacturing raw materials installed here.

Plastic manufacturers for the automobile industry

The automobile sector is one of Catalonia's most important industries, thus meaning there is a local market; they find availability of raw material manufacturers in a strategic location.

Cosmetics

In this area, there is an availability of raw material manufacturers, a favourable environment for packaging, for example. The main sector companies are already here, there is also a consumer market, and specialised technological centres.

New materials for 3D

In Catalonia there is availability of raw materials and a favorable 3D printing environment.