CIAmatters

ESSENTIAL INFORMATION FOR YOUR INDUSTRY

NO. 135
SUMMER 2023
WWW.CIA.ORG.UK

ChemTalent
CHEMICAL INDUSTRIES ASSOCIATION

Inspiring the next generation

Meet our new Young Ambassador - heading the ChemTalent Network, changing the face of the chemical industry and bridging the skills gap — SEE PAGE 12

Industry's night of celebration — SEE PAGE 22

CIA Health and Wellbeing Conference — SEE PAGE 35

CIA CHEMICAL INDUSTRIES ASSOCIATION

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CIA*MATTERS*, SUMMER 2023

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From the CEO's Desk

FOR FURTHER INFORMATION CONTACT:

Steve Elliott
ElliottS@cia.org.uk

The chemical industry continues to do what it does best against a relentlessly challenging economic backdrop

Welcome to the latest edition of our member magazine, *CIAMatters*. As we head to the Summer holidays, the UK is becoming an even more challenging place to do business for chemical companies. Our latest business survey, which we have yet to conclude, will confirm new and tougher circumstances as members continue to report falling sales, raw material challenges and spiraling labour costs.

Since our last edition, I have spelt out to politicians across all parties, advisors, civil servants and others that businesses need at least a temporary pause from inflated costs, which are under the control of Government. Failure to deliver will lead to more job losses and even closures. Every Chief Executive I speak to understands that Government does not control the entire framework within which companies operate but ever-growing net zero costs, failure to tackle inflation (our rate as I write this is over three percentage points higher than the Eurozone, nearly double the rate in India and France and almost three times that of America) puts us in the worst position opposite our competitors for chemical business investment. On top of that, after more than seven years since the Brexit vote, we have no certainty when it comes to our own country's chemical regulation.

These are just some of the challenges that Government could and should be doing its utmost to tackle. While it may argue it has policies in place they are not solving the problems we are facing, and we do not have a long time to get it right. See more on delivering future energy and UK REACH on page 4. Despite this, some fantastic scientific developments are happening in our member companies, and I am grateful to everyone for that.

Nevertheless, the chemical industry continues to do what it does best against a relentlessly challenging economic backdrop. Last month, we gather in Manchester to celebrate the very best of the chemical industry at our CIA Chemical Industry Awards 2023. This year we had a similar number of entries to last year's record breaking number. With our highest ever for the manufacturing and innovation awards. In the face of all these obstacles, the level of resilience shown by chemical companies is, frankly, astonishing and I thank you for your continued support in demonstrating that individual and collective achievement through these Awards. Take a look at the winners on page 23.

Looking to our long-term future, the Young Ambassador Award, sponsored by Scientific Update, once again proved very popular. A common theme many of the candidates wanted to highlight was the importance of Diversity and Inclusivity, particularly when attracting younger people into the industry. This year, Amy Summerton from SABIC UK Petrochemicals won the award and will be leading CIA's ChemTalent for the next year. Find out more about Amy on page 12.

Finally, our in person events are more popular than ever. In June, the CIA held its Health Leadership and Wellbeing Conference 2023 in Leeds. It was an opportunity to bring the chemical industry together and discuss how we can successfully achieve a sustainable healthy workplace, see page 35. It does not end there coming up, we have the CIA Sustainability Conference in October. More information will be available closer to the time. Also, in November, our CIA Annual Dinner will take place on 16 November 2023 in London at the Grosvenor House Hotel – a fantastic occasion for celebration, networking and great entertainment.

As we go through the holiday season and head to the Autumn let us hope that we can begin that season on a surer footing to attract and retain the investment we need.

Steve Elliott
Chief Executive

Policy Director's overview

FOR FURTHER INFORMATION CONTACT:

Nishma Patel
07885 831742
PatelN@cia.org.uk

Delivering future energy

As we look to a 'summer break,' many of us, for now, will be relieved to have avoided the worst in terms of an energy crisis. Thankfully, as it stands in June, energy spot prices have halved from where they were in April/May ranging between 50p-£1, and as we trade ahead, forthcoming winters remain at and above, at £1 therm down from the highs of £7+. However, underlying prices do remain 2-3 times above where they were before GB energy costs were ramped up. Equally on security of supply risks, we largely anticipate similar risks as this time last year – that should cold, calm weather materialise here or in continental Europe, there remains a very material risk of high prices, potential for curtailing large industrial GB demands, exports to Europe, and in the extreme cases, emergency disconnection of both gas and power users.

It is for these reason we will be focusing our work in three key areas:

1. Keeping members informed on risk development as we enter into the coming winter, including a dedicated session on industrial demand side response (DSR), for both electricity and gas. National Gas Transmission and National Grid ESO joining us will be taking place in July.
2. The delivery of the long campaigned call for action on energy policy related costs being delivered via the 'British Industry Supercharger.' A package of measures to benefit some energy intensive businesses include: an increase from 85% to 100% relief from the costs of the renewable levies, through the EII Exemption Scheme; a new 100% indirect exemption from Capacity Market charges, and; relief from eligible network charging costs through a new EII Network Charging Cost Compensation Scheme.
3. Informing Government decision on potential temporary support for gas intensive industry, particularly where decarbonisation options are limited and policy costs shift to gas bills.

The other immediate issue we are urgently pressing with Defra but now also via the Business and Trade Department and via Treasury's work on 'pro-innovation for advanced manufacturing' is none other than UK REACH. Whilst we have secured legislation extending the registration deadlines for transitional registrations and these have been passed by both Houses in Parliament, eighteen months on we are yet to see any signs of a cost effective solution. In acknowledging our concerns about the pace of the work and the deliverability of the model, Defra has confirmed that:

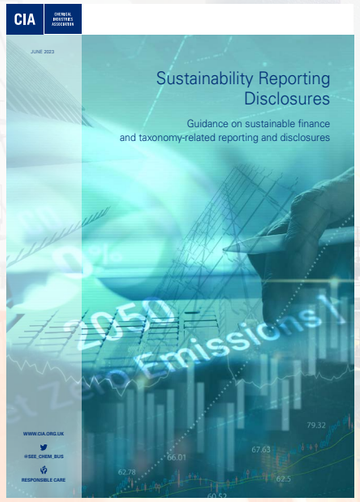
(i) clarity on the information essential for delivery of UK regulation,
(ii) cost and deliverability to industry, and
(iii) intellectual property and copyright risks remain the 3 main factors to consider in developing the model.

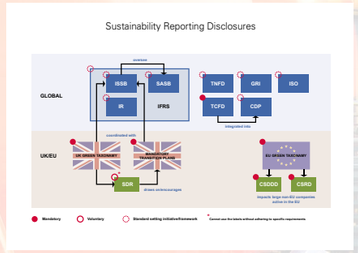
It has also been confirmed that the earliest Defra could publicly consult on the proposal will be the end of 2023 and that remains their plan. In parallel to our engagement with Defra, we are continuing to reflect on possible outcomes and alternative scenarios (including the Swiss approach) that could bring benefits to both industry and the regulator.

Other 'pro-innovation recommendations we have put in front of Government officials include:

1. Innovative use of waste products: chemicals recycling and a clear mass balance approach and a price signal in UK ETS which incentivises the use of captured carbon in the production of new products.
2. Simplification of reporting schemes and data. Review industrial decarbonisation data collection and annual reporting with a view to develop a single reporting channel to enable effective monitoring and evaluation, and policy implementation.
3. Modernising environmental permitting process. Develop an environmental 'regulatory sandbox' as used by Ofgem in the energy markets and the FCA in the financial markets, to allow the flexibility needed for the development and deployment of new technologies, processes and products in a timely manner.

Looking to practical support, our Sustainability Steering Group recently published guidance on sustainable finance and taxonomy-related reporting and disclosures. With implications on investment opportunities, the guide has been designed to help businesses navigate the complex policy landscape and provide a better understanding of how the different standards and disclosures influence and interact with one another. See further details on the CIA website.



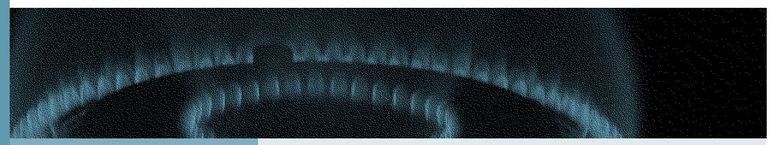


Energy

FOR FURTHER INFORMATION CONTACT:

David Mitchell
07538 037014
MitchellD@cia.org.uk

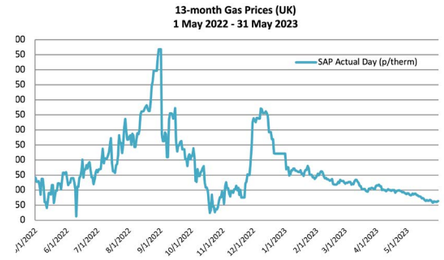
Richard Woolley
07947 687882
WoolleyR@cia.org.uk

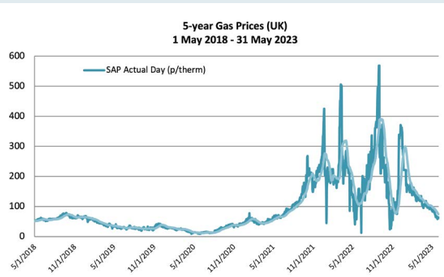


13-month Gas Prices (UK):

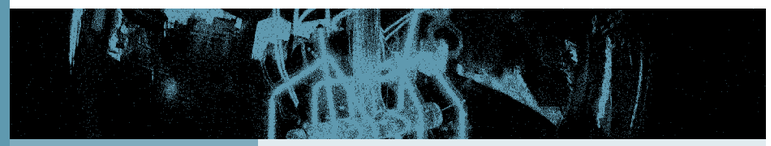
1 May 2022–31 May 2023
SAP Actual Day: 13p/therm-568p/therm

Average SAP Actual Day: 172p/therm





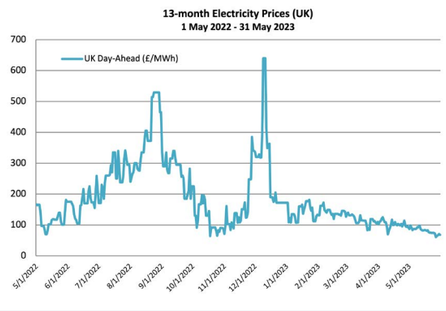
Source – Inspired Energy

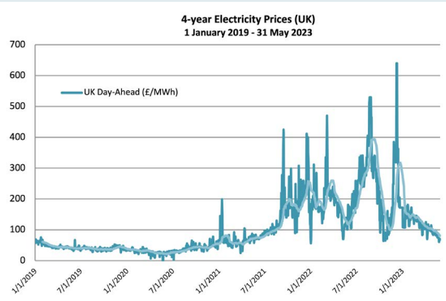


13-month Electricity Prices (UK):

1 May 2022–31 May 2023
Day Ahead: £60-£640 MWh

Average Day Ahead: £182 MWh





Source – Inspired Energy

Natural gas outlook

We avoided an energy crunch last winter courtesy of a remarkable European scramble to save energy and boost storage, surprisingly warm winter weather, and large inflows of liquefied natural gas (LNG), in particular from the US and Qatar. As seasonal heat demand has fallen away, natural gas prices have been falling but volatility, as well as uncertainty about the winter ahead, remains. Weather, European storage and LNG supply will once more have a critical role to play as we look ahead to colder months.

By mid-May, European natural gas prices had returned to their normal trading range for the first time since the start of the energy crisis, falling below €30/MWh to reach the lowest level since June 2021. The low prices are in stark contrast to last summer, when the European TTF benchmark soared to more than ten times its normal level, peaking above €340/MWh when Russia slashed gas exports to Europe. In addition to seasonal demand, the drop is also a sign of the ample quantities of gas already in storage, as traders refill ahead of next winter. Writing in June, the EU's gas storage tanks are 70% full, an unusually high level for this time of year.

Despite this comparatively strong position, in mid-June the prices were jolted by forecasts of hotter weather and supply outages extended at key fields in Norway, prompting traders to fret over Europe's gas supplies. While the EU is on track to meet its target that its gas stores are 90% full in November, traders worry that short-term factors could hamper efforts. Chief amongst their concerns are a hot summer drawing on more gas for cooling, a pick-up in Asian demand, and more supply disruptions to the remaining Russian pipeline flows.

To counter this volatility, and protect against threats next winter, the European Commission is committed to lowering gas demand and is even in talks with banks – including the European Bank of Reconstruction and Development – to provide guarantees for companies willing to store their gas in Ukraine. The war-torn country could offer 10-15bcm to European companies, to add to the EU's current gas storage capacity of about 115 bcm. On this side of the channel the storage situation is not much improved, with Rough still operating at 20% capacity and awaiting a strategic decision on long-term funding from Government. We will look to European storage to relieve volatility next winter.

Electricity outlook

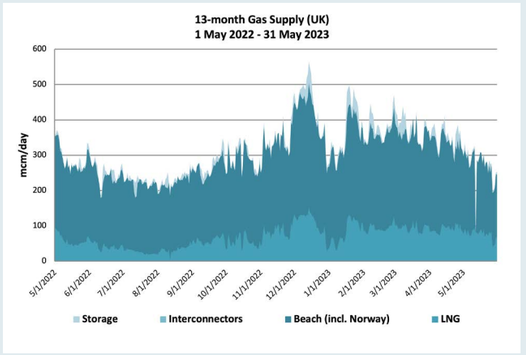
Wind powered the UK more than gas for the first time in history, this year, according to analysis by Drax. In the first quarter of 2023, wind turbines overtook gas-fired power stations in the contribution to the country's energy mix, providing 32.4% of the nation's power, with gas delivering 31.7%. Combining all renewable sources, green energy made up 42% of all electricity, with fossil fuels accounting for 33% and the remainder coming from nuclear and imports.

Even so, the UK is set to miss its targets for offshore wind this decade, Energy UK has warned. The government has committed to ramp up offshore wind generation from 14GW to 50GW by 2030 and according to the industry body, 27GW of supplies are either in operation or in receipt of a contracts for difference (CfDs) arrangement. However, long lead-in times for offshore wind projects – which require development, planning permission, and connection to the grid – means the remaining 23GW has to be secured within the next three auction rounds. This would require 8GW per round, whereas Energy UK expects the current fifth allocation round will bring forward just 3.2GW of new capacity.

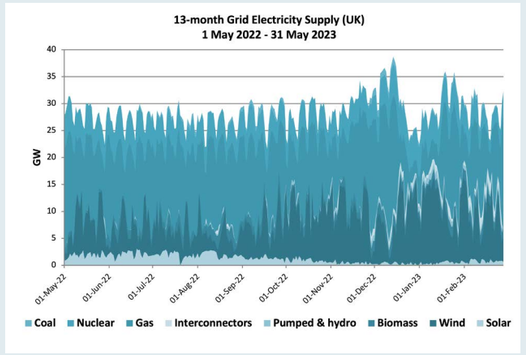
And when projects are awarded funding, they will struggle against bottlenecks for grid connection. As of February 2023, the UK had 83GW of connected generation and a further 257GW of generation in a queue awaiting connection. The backlog comprises more new generation capacity than the country actually needs. National Grid modelling suggests that the UK needs only 123-147GW of new generation to be connected to the grid by 2030 to be on the pathway for net zero power by 2035.

While wind that is already installed is facing a challenge getting electrons to market. Carbon Tracker have reported that bottlenecks in the transmission system meant that the grid had to pay to stop wind power generation, while paying gas stations to increase outputs, on more than 200 occasions in 2022. Their research found that from January 2021 to April 2023, £1.5bn was spent to curtail more than 6.5 TWh of wind power, leading to 2.5m tonnes of emissions that otherwise could have been avoided. In response, gas-fired plants were paid nearly £600m to compensate for the curtailed wind power.

The UK's electricity generation mix is changing at pace and new policy, and significant infrastructure investment, are needed to fully realise the gains being made whilst keeping costs low for consumers.



Source – National Grid



Source – GridWatch

Chemicals Management

FOR FURTHER INFORMATION CONTACT:

Silvia Segna
07951 389872
SegnaS@cia.org.uk

Roger Pullin
07951 387317
PullinR@cia.org.uk

Kirsty Eley
07508 401743
EleyK@cia.org.uk

PRODUCTS AND CONSUMER HEALTH

CHEMICALS MANAGEMENT — UK

UK-REACH PFAS RMOA Report Published

In April the Environment Agency and the Health and Safety Executive published their Risk Management Option Analysis (RMOA) report for PFAS under UK-REACH. The recommendations to Defra's policy makers are for the UK to implement a targeted UK-REACH restriction approach based on persistence and that potential restrictions need not apply to low-hazard groups / uses which could be highlighted as derogations in restriction proposals (this would include uses in sealed or contained systems). This is different to the wide scope approach being considered by the EU. Proposals are made in the RMOA report for the following:

(i) Prepare dossiers to support one or more UK REACH restrictions (initially the use and disposal fire-fighting foam, wide dispersive uses e.g. coatings and cleaning agents, and where PFAS released from articles);
(ii) introduce a UK-REACH authorisation for uses of PFAS in processing aids in fluoropolymer manufacturing and processing,
(iii) further evaluate and investigate PFAS highlighted to be of concern,
(iv) continue work across government and with external stakeholders,
(v) review F-gas regulations, and
(vi) develop drinking water statutory standards. Defra has already indicated a UK-REACH restriction will be taken forward for PFAS use in fire-fighting foams under the 2023-2024 UK-REACH Work Programme (not published at the time of writing). In terms of other actions, policy makers will continue to consider the recommendations in the report and our engaging with stakeholders through a Defra led PFAS working group under its Chemicals Stakeholders Forum. The report is available on HSE's website.

CHEMICALS MANAGEMENT — EUROPE

Regulating Microplastics in the EU

Microplastics is a term used for plastics meeting the size criteria of 5 mm and less regardless of where they originate, they may be from the breakdown of larger items including synthetic textiles and tyres, as well as those that are intentionally manufactured at this size for either adding into products or use as feedstock for the production of other larger plastic items. Due to the persistence of both plastics and microplastics, policy makers are continuing to explore a range of policy measures for tackling pollution arising from these.

So where are microplastics intentionally added and how much are used? According to the European Chemicals Agency (ECHA), they are:

"intentionally added to a range of products including fertilisers, plant protection products, cosmetics, household and industrial detergents, cleaning products, paints and products used in the oil and gas industry. Microplastics are also used as the soft infill material on artificial turf sports pitches.

In consumer products, microplastic particles are best known for being abrasives (e.g. as exfoliating and polishing agents in cosmetics known as microbeads), but they can also have other functions, such as controlling the thickness, appearance and stability of a product. They are even used as glitters or in make-up.

Overall, around 145 000 tonnes of microplastics are estimated to be used in the EU/EEA each year." [Source: https://echa.europa.eu/hot-topics/microplastics]

In the European Union at the end of April, we saw the proposed restriction under EU-REACH for intentionally added microplastics take a significant step forward to becoming EU law. The EU's Member State REACH Committee has approved the European Commission's legislative proposed text. This consequently triggered a three month scrutiny period by the EU Council and European Parliament, after which if not refuted will pass into law once it is published in the EU Official Journal of Law. The legislative procedure referred to as a Delegated Act means these institutions are unable to propose amendments to the text and must either approve as is written or disapprove whereby the text would go back to the European Commission for reconsideration.

Looking to the UK, authorities have decided rather than launch straight into drafting a legislative proposal for a restriction under UK-REACH, an evidence gathering exercise would be first carried out to help policy makers identify whether further control measures to protect the environment and human health are needed. This work is currently underway, being carried out as part of the Health and Safety Executive's 2022-2023 UK-REACH Work Programme; it is unknown whether this will be completed by the summer when the new 2023-2024 UK-REACH Work Programme commences. In contrast to the EU, the UK already has existing legislation in place covering microbeads that will likely have a bearing on policy makers in terms of their decision making. Statutory Instruments in the devolved nations prohibiting the manufacture and use of microbeads were all adopted into law prior to the UK leaving the EU.

What's in the EU legislation approved by the EU-REACH Committee?

The proposed restriction of intentionally added microplastics under EU-REACH is wide in scope and those synthetic polymer microparticles that meet the conditions of the restriction *"shall not be placed on the market as substances on their own or, where the synthetic polymer microparticles are present to confer a sought-after characteristic, in mixtures in a concentration equal to or greater than 0,01 % by weight"* [Paragraph 1 of the legislative text]. The conditions are as follows in that the synthetic polymer microparticles are solid, meeting both of the following:

(a) are contained in particles and constitute at least 1 % by weight of those particles; or build a continuous surface coating on particles;
(b) at least 1 % by weight of the particles referred to in point (a) fulfil either of the following conditions:
(i) all dimensions of the particles are equal to or less than 5 mm;
(ii) the length of the particles is equal to or less than 15 mm and their length to diameter ratio is greater than 3.

According to the legislative proposal, this does not apply to polymers that are: "the result of a polymerisation process that has taken place in nature, independently of the process through which they have been extracted, which are not chemically modified substances"; degradable (in accordance with the conditions stated); soluble where their solubility is more than 2 g/L (in accordance with the conditions stated); and those that do not have carbon atoms in their chemical structure.

Those synthetic polymer microparticles that meet the conditions of the restriction, as substances on their own or in mixtures, may still be exempt if they are for use at industrial sites or fall under the scope of EU sectoral legislation i.e. medicinal products (Directive 2001/83/EC), veterinary medicinal products (Regulation (EU) 2019/6), fertilising products (Regulation (EU) 2019/1009), food additives (Regulation (EC) No 1333/2008), in-vitro diagnostic devices, including devices (Regulation (EU) 2017/746); food and feed (Regulation (EC) No 178/2002).

Where synthetic polymer microparticles, as substances on their own or in mixtures, are either contained by technical means to prevent environmental releases when used for its correct purpose and in accordance with instructions, or permanently modified during intended use, or are permanently incorporated into a solid matrix during their use, then they can continue to be placed on the market subject to conforming to the provision of information requirements detailed within the legislation.

For certain uses of synthetic polymer microparticles, the restriction does not apply until a specific number of years after the legislation has entered into force:

- 4 years for 'rinse-off products' (unless contain microbeads);
- 5 years for detergents (unless contain microbeads), fertilising products outside scope of Regulation (EU) 2019/1009 and other products for agriculture and horticulture;
- 6 years for encapsulation of fragrances, leave-on products, devices (unless contain microbeads);
- 8 years for plant protection products & seeds treated with those products and biocidal products, granular infill for use on synthetic sports surfaces; and
- 12 years for lip products (unless contain microbeads).

INTERNATIONAL

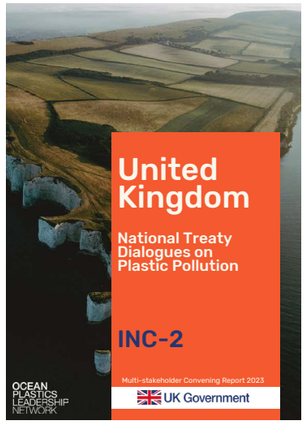
2023 BRS Triple COP

The 2023 meetings of the Conferences of the Parties to the Basel, Rotterdam and Stockholm Conventions took place 1 to 12 May 2023 in Geneva. According to the press release issued following the meeting by the BRS Secretariat, over 2000 delegates representing 180 countries attended the meetings. Three new chemicals deemed as presenting significant risks to human

health and the environment were listed for elimination under the Stockholm Convention on Persistent Organic Pollutants (POPs). The substances placed on Annex A for elimination were methoxychlor, Dechlorane Plus and UV-328. Further to this, procedures and mechanisms on compliance were also adopted under the Stockholm Convention. An additional pesticide (terbufos) became subject to the Prior Informed Consent procedure for imports and exports under the Rotterdam Convention. The effectiveness of the Rotterdam Convention was also debated and a proposal rejected for creating an additional Annex for substances recommended by the Chemical Review Committee but not agreed by the Conference of the Parties. Under the Basel Convention, technical guidelines were adopted on the environmentally sound management of plastic waste, POPs waste and e-waste under the Basel Convention. Further information can be found in the press release.

Negotiators discuss Global Plastics Treaty content

On 29 May to 2 June negotiators from UN signatory countries and stakeholders came together for the second UN International Negotiating Committee meeting (INC-2) for developing a Global Plastics Treaty. Four further INC meetings are planned in the run up to the end of 2024, after which the



proposed Treaty text will be ratified INC-3 is scheduled for November 2023. In advance of INC-2, the UK sought stakeholder views through a UK Stakeholder Dialogue meeting to help inform UK negotiators; Defra is the lead government department). Stakeholder Dialogue meetings have been held prior to both INC-1 and INC-2, being organised and run by the Ocean Plastics Leadership Network on behalf of Defra – click here for report. The UK is a member of the High Ambition Coalition to End Plastic Pollution group of countries, being a signatory to a Joint Ministerial Statement published before the start of the second round of negotiations. Further information on the Treaty's development can be found on the United Nations Environment Programme website.

UN Signatories to debate international chemicals management

In September delegations form UN signatory countries and stakeholder groups will head to Bonn to attend the Fifth International Conference on Chemicals Management (ICCM5); this takes place 25-29 September. At the Conference Ministers from UN signatory countries, including the UK will be asked to agree to commitments and targets under the UN's Strategic Approach to International Chemicals Management (SAICM) programme. SAICM is a voluntary international mechanism for improving international chemicals management. At the time of writing, the programme was not yet available on the UN SAICM website.

OTHER

EFSA Concludes re-evaluation of bisphenol A safety

In April, the European Food Safety Authority reported on its re-evaluation of bisphenol A in food contact materials. Potential harmful effects on the immune system were identified and as a result EFSA scientists lowered the previous temporary level of 4 micrograms (4 millionths of a gram) per kilogram of body weight per day to 0.2 nanograms (0.2 billionths of a gram). EFSA's recommendation for setting a new regulatory limit for how much bisphenol-A can migrate from food packaging into food is currently being discussed by the European Commission and Member States. NGO groups have also suggested that the same recommendation be applied to other bisphenols as a precautionary measure. For more information, see EFSA's press release.

REACH

UK REACH deadlines extension

We are pleased to report that the Statutory Instrument that extends the UK REACH registration deadlines for transitional registrations was debated and supported on Tuesday by the House of Lords. Now that both Houses have agreed, the legislation will be enacted during the summer thereby extending the deadlines across all tonnage bands by 3 years (i.e., from 27 October 2023, 2025, 2027 respectively to 27 October 2026, 2028, 2030) to give time to Defra to develop an alternative registration model for transitional registrations. We will keep members informed as soon as the legislation is published.

HSE publishes final opinion on proposed restriction regarding tattoo and PMU inks

HSE has published the consolidated final opinion on the proposed UK REACH restriction covering hazardous substances in tattoo and permanent makeup (PMU) inks in Great Britain. These opinions cover the recommendations of HSE as the Agency for UK REACH and will now be subject to the decisions of the Secretary of State and the Devolved Administrations on whether to bring in the legislation.

For further information, please see the HSE press release.

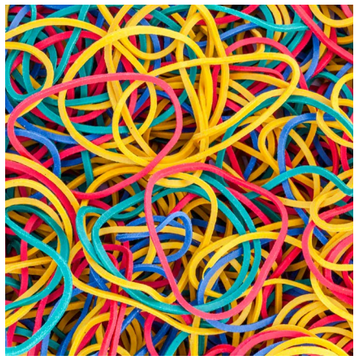
HSE publishes RAP for 2023-2025

HSE has published the Rolling Action Plan (RAP) for 2023-2025 of substances to be evaluated under UK REACH, in line with the obligations listed under Article 44 of UK REACH.

Further information on the RAP can be found on the HSE website here, and in the related HSE UK REACH eBulletin.

Two substances added to SVHC Candidate List in EU

ECHA has added two new substances to the Candidate List of substances of very high concern (SVHC) under EU REACH, taking the total number of entries to the EU Candidate List to 235.



Examples of given uses of the newly designated SVHC included uses in inks and toners, coating products, photochemicals, polymers, and manufacture of chemicals, plastic products and rubber products.

More information on the substances and their uses can be found in the related article on the ECHA website.

CLASSIFICATION, LABELLING, PACKAGING

GB Classification, Labelling and Packaging (GB CLP)

On Annex VIII (PCNs), DHSC issued a statement confirming their intent to revoke Annex VIII within GB CLP by the end of 2023, using powers granted by the REUL (Retained EU Law) Bill. This will be done without public consultation. Following the repeated message that HSE will *"continue to maintain a pragmatic and proportionate response to enforcement"*, CIA continues to advise members to continue with voluntary submission of SDS as previous, until revocation is formally complete.

Developments in GB MCL (Mandatory Classification and Labelling) are listed below:

- GB MCL Technical Reports: 19 reports issued to date in 2023. No divergence from EU RAC opinions.
- GB MCL Agency Opinions: 19 opinions issued to date in 2023. No disagreement with conclusions of respective Technical Reports, and only one of these initial TRs disagreed with the respective RAC opinion.

Finally, as anticipated in the previous edition of *CIAMatters*, the HSE intention to make the first updates to the GB MCL list was confirmed in April, when a notification was issued to the WTO's TBT (Technical Barriers to Trade) Committee, signalling the intention to update the list based on the Agency Opinions issued between May and September 2022.

EU's Chemical Strategy for Sustainability (CSS) – CLP Revision

Regarding the CLP Revision, CIA contributed to the Cefic submission regarding the draft legislative proposal for the core text of CLP, including feedback received from the CLP/GHS Issue Team. Key points raised in the response included the need to avoid grouping of substances in scientifically inaccurate ways (e.g., based on structural similarity alone), ensuring proposed definitions and classification rules for 'multi-constituent substances' do not conflict with current definitions under REACH, ensuring adequate timelines for label update requirements, and avoiding strict and over-prescriptive label formatting rules. Since submission, there have been proposed amendments tabled on the CLP by ENVI MEPs; CIA continue to monitor and support Cefic advocacy on the CLP Revision.

Q&A with CIA's Young Ambassador Award winner – Amy Summerton –

Research Chemist, answers questions about her role at SABIC Petrochemicals UK Ltd

Q –How did you feel when your name was announced?

A – I had two feelings and the first was pure shock! As the evening progressed and I chatted to the other shortlisted nominees I quickly got the feeling of how amazing everyone was and some of the fantastic things they have achieved. Also, I felt extremely grateful and rewarded; it feels like a reflection of all the things I have done so far, that I am passionate about, within our industry.

Q – Tell us a bit about you and your background.

A– No one knows what they want to do when they leave school and when I was making these crucial choices, I was steered towards the A level and university route without complete understanding of the apprenticeship route although I knew I wanted a career in science. Aged 16, I joined SABIC as a Laboratory Technician Apprentice and now 8 years later I am working as a Research Chemist for SABIC's Technology & Innovation group based in Teesside but supporting and working with assets across the globe. At the moment, I am working on projects supporting process chemistry but also working on SABIC's Plastic Recycling Initiative TRUCIRCLE. Alongside this I decided to change my career path slightly in 2017 and completed a HNC in Chemical Engineering whilst working as Laboratory Technical Supervisor for SABIC Teesside's Olefins 6 Cracking plant. I am now about the enter my third year of my BEng Chemical Engineering studying part time via day release.

> "Aged 16, I joined SABIC as a Laboratory Technician Apprentice and now 8 years later I am working as a Research Chemist for SABIC's Technology & Innovation group – Amy Summerton

Q – What do you love about your job?

A – My favorite thing about my job is the opportunities and experience I have had and those I am yet to gain. My current job role allows me to work both independently and within the team whilst working on a variety of different projects. I have been lucky enough to travel to different locations on business and work in teams every day from different cultures. Earlier this year I had a slight reality check moment as I travelled to Houston, TX to align with an external company for a Joint Development.

Thanks to SABIC I am here as the Young Ambassador for 2023. In the past 8 years I have undertaken my apprenticeship (with experience on 3 different assets), a manufacturing-based role and now my role as Research Chemist. I have been granted the opportunity to study alongside my career with full support and sponsor of the company. I have visited various locations, undertaken many courses and worked on so many different projects and find myself so lucky to have done this all by the age of 24. The platform I have had in SABIC I have used to try engage & inspire others via my position as chair of the Teesside Education Liasion, SABIC Womens' Network & SABIC Young Professionals.

ChemTalent
CHEMICAL INDUSTRIES ASSOCIATION

> "I would like to change the approach of reaching out to current hidden talent that will exist in pockets of our industry – Amy Summerton

For a higher level of engagement, you can join our ChemTalent committee as a representative. A representative is more of an active role in the network, attending meetings, completing actions, having a say in what our group works, attending CIA events etc.

Q – What first interested you about the Chemical Industry?

A – I am from Teesside. For those who are not so familiar you cannot quite travel anywhere without seeing the view of the various manufacturing sites, steel industry and various plants lining the skyline from Billingham to along the River Tees to Redcar. As I got older, I began to wonder… what actually do these things do… and what are they? Back in the summer of 2015, I completed work experience on SABIC's North Tees Logistics site within the lab. These two weeks were crucial as they helped make my decision to look for an apprenticeship. I knew I wanted to work in STEM – what if I could do it whilst gaining experience and an education. As I learn more and more everyday about this industry, especially local to me; you never quite know what is going on and being made right by your doorstep.

Q – What do you think can be done to attract others to join the industry?

A – ChemTalent is a source and platform for young people in our industry to have a voice… and this is a crucial place we must use it! Us within our industry are aware of all the great things about it and I myself speak strongly of all the opportunities its offered me but perhaps others are not. The growing stance on D&I and the changes made so far, I think, also help this; it is no secret that many parts of our industry are male dominated and still are today but with a voice and reaching out together we can join the action to make the change. For 6 years I was the only female on the shift rotation on the asset I worked on and, in the beginning, it posed the question of why? Since then, I have used being a STEM Ambassador to promote the career choice to the future diverse STEM employees.

Q – What do you hope to achieve as Young Ambassador with the ChemTalent Network?

A – When I did the interview stage for the role, I was asked this question and I thought about how can I really make a change but the answer was quite clear. I would like to change the approach of reaching out to current hidden talent that will exist in pockets of our industry. During the time I have spent being an apprentice/early in my career I was not aware of the opportunity to be a member of ChemTalent. I have spoken to various different colleagues/student/friends of similar age at different companies, and they were also not aware, but would love to be involved. I would like to work with apprenticeship providers & societies to create an 'Invitation' style reach out to all new starters. If we increase our volume, our combined voice and output can only be louder.

Q – What do you consider the biggest challenges facing our industry at the moment?

A – To begin with the obvious one is the energy crisis…as much as I would love to change that! Yet it is important we support each other as businesses can face uncertainty and harder times in the current climate. But another huge challenge for our industry is in fact the skills shortage which is something our platform can make a difference too. The STEM initiative connecting with children from a young age is so important to explain how fantastic our industry is but also let them know all the great options and opportunities out there for them. We must support the next generation of engineers, scientists & technicians and encourage them to join us.

Q – Where would you like to see yourself in 10 year's time?

A – In 10 year's time I see myself as hopefully a chartered engineer and with another 10 years of experience under my belt to add to the 8 I have no idea what I will be doing! In my current job role, I am on a career ladder that progresses through different scientist grades to Research Fellow. I love my technical role, but I also have keen interest in supporting our next STEM generation. At the moment, we are in what we could call another industrial revolution powered by sustainability and with things such as the Green Deal and Net Zero who knows what new technology will be created and implemented. I'm excited for what the future holds whatever it may be.

Q – Finally, there are some exciting plans in place for ChemTalent over the coming year. How can people get involved?

A – This year we are implementing a new structure to ChemTalent. As I lead this year I encourage and welcome all young and passionate members of our industry to get involved. There is so many different ways you can get involved and on so many different levels of commitment. Firstly, we will be active on LinkedIn and Twitter so follow us there for various updates, announcements, advice & opportunities. To join us at the ChemTalent network, all you need to do is email 'join' to chemtalent@cia.org.uk! With access to newsletters, webinars and opportunities for networking with other passionate members of our industry.

Environment and climate change

FOR FURTHER INFORMATION CONTACT:

CLIMATE CHANGE
Richard Woolley
07947 687882
WoolleyR@cia.org.uk

ENVIRONMENT
Mike Squire
07920 809091
SquireM@cia.org.uk

ENVIRONMENT

Government consults on addressing carbon leakage

In February, a cross-party commission was launched, to explore how the UK can reach net zero without undermining the competitiveness of British industry. The so-called Commission for Carbon Competitiveness, received evidence from stakeholders over the following month, with the intention of using it to encourage the government to pursue more effective carbon leakage mitigation measures. CIA responded in writing and also went before the Commission to provide oral evidence.

Then on 30 March, the government published an exploratory consultation considering a range of potential policy measures designed to mitigate carbon leakage risk and 'ensure UK industry has the optimal policy environment to decarbonise'. Potential policies include a carbon border adjustment mechanism (CBAM), mandatory product standards (MPS), and other policy measures, that would help grow the market for low carbon products. The government also propose a new embodied emissions reporting framework which could support the implementation of any new mitigation measure.

The officials behind the proposals, from both the Treasury and the new Department for Energy Security and Net Zero, presented to CIA's Energy & Climate Change Policy Network on 6 June, and heard feedback direct from members. CIA is in the process of putting together a response, informed by member input, which we'll submit to government on 22 June. The general principles of that response will be that any new policy must level the playing field for UK manufacturers, whilst also minimising administrative burden and trade interruption. We understand the Commission for Carbon Competitiveness will also submit a response to the government's consultation, based on the evidence they've received.

Energy Bill Discount Scheme is launched

From 1 April, the Energy Bills Discount Scheme replaced the Energy Bill Relief Scheme, which had supported businesses with winter energy costs, helping to mitigate the worst of the energy crisis. The new scheme will run for 12 months, from 1 April 2023 to 31 March 2024, and is made up of two elements of support.

1. The first is a baseline level of potential discount which provides support for all non-domestic customers in Great Britain– this support is calculated and applied automatically by the Ofgem licenced supplier.
2. The second is targeted at Energy and Trade Intensive Industries (ETII), providing a higher level of support to those in eligible sectors who meet the necessary criteria.

Organisations wanting to apply for the higher level of ETII support will have 90 days (starting from the 26 April 2023) to do so through an online portal. New organisations, or newly eligible organisations, will have 90 days from the date at which their operation become eligible. The discounts will apply to bills from 1 April 2023 and sites should continue to pay their bills as normal until the discount is reconciled.

CIA welcomed the new support scheme, acknowledging that it will help us to avoid a cliff edge in energy costs, but cautioned that more may be needed if prices start to head upwards again this winter. If you have any questions with regards to the scheme or your application, please contact our energy team for support – David Mitchell (MitchellD@cia.org.uk) and Rich Woolley (WoolleyR@cia.org.uk).

British Industry Supercharger announced

In late February, the Government announced what it termed the 'British Industry Supercharger', a package of measures designed to improve the competitiveness of the UK's energy intensive industries (EII). 300 businesses across the UK stand to benefit from the package, which will include:

- an increase from 85% to 100% relief from the costs of the renewable levies, through the EII Exemption Scheme;
- a new 100% indirect exemption from Capacity Market charges, and;
- relief from eligible network charging costs through a new EII Network Charging Cost Compensation Scheme.

The support will be made available to sectors particularly exposed to the cost of electricity, such as chemicals, steel and paper.

A consultation on the proposed changes was launched in May, and CIA is working with partners in the Energy Intensive User Group (EIUG) to develop and submit a response. We have welcomed the announcement as a crucial package for helping UK businesses to remain internationally competitive, and for its potential to enhance the UK's attractiveness as a destination for international investment.

Climate Change Agreements scheme extended and maybe redesigned…

The Climate Change Agreements (CCAs) are voluntary agreements made between UK industry and the Environment Agency to reduce energy use and carbon dioxide emissions. In return, operators receive a discount on the Climate Change Levy (CCL), a tax added to electricity and fuel bills.

The scheme had been scheduled to conclude with its final reporting exercise taking place earlier this year, requesting data for 2021 and 2022. Compliance with this exercise certified sites for a further two years of relief from the CCL, up to 31 March 2025. However, a consultation launched in mid-March proposed an extension to the scheme. Assuming this goes through, participants will be required to report a single year's worth of data for the 2024 calendar year, in Q1 2025, for continuous relief from the CCL up until 31 March 2027 (i.e. there is a break in reporting for 2023 but no gap in relief).

CIA welcomed the extension as a necessary carbon leakage mitigation measure but suggested that an announcement of a longer scheme would provide greater certainty to businesses looking to invest. There are proposals for a future scheme in the works, post-extension, but the detailed design is yet to be consulted on. We will engage with that consultation as it emerges, in the meantime we will begin the process of target negotiation with the government to establish a sector target for 2024. The negotiation process will take place over the summer with final targets in expected to be in place by November.

Energy Security Day ('Green Day')

On 30 March, the government published 44 documents related to the energy transition. The release of documents was tied to what the government originally called 'Green Day' but later re-titled 'Energy Security Day'. Key for us amongst the announcements were commitments to:

- *Announce the first hydrogen projects under the Net Zero Hydrogen Fund (2023)*
- Publish a long-term plan for the UK ETS (2023)
- Launch a call for evidence on industrial electrification (2023)
- *Launch Local Industrial Decarbonisation Plans competition (2023)*
- Respond to carbon leakage consultation (2023)
- Publish Biomass Strategy (2023)
- Begin negotiations with three Industrial CCS projects as part of Track-1 (2023)
- Begin process to identify two Track 2 clusters for decarbonisation support (2023)
- Develop an approach to power/ gas price rebalancing (2023/24) with impact by 2024
- Launch new funding under Industrial Energy Transformation Fund (2024)
- Review 'support' for energy efficiency in commercial buildings (no date)
- Consider options to formalise cross-Govt policy making (no date)

Those in italics have already taken place. Winners of the Net Zero Hydrogen Fund included a green hydrogen project by Tata Chemicals and a blue hydrogen production project at Essar's Stanlow site. The Local Industrial Decarbonisation Plans competition was launched on 5 June and the application window runs until 2 August, with the aim of supporting dispersed industrial clusters to develop decarbonisation plans. The extension of the Industrial Energy Transformation Fund has also been announced – a further £185mn – but funds will not be available before 2024 and the final design of the competition is to be consulted on this year.

UK GOVERNMENT

March 30, 2023, was dubbed 'Green Day' in the UK, as the government published numerous policy statements, consultation responses, new consultations, and guidance, which all form part of its wider strategy called 'Powering Up Britain.' Green Day (44 documents) included the release of the 2023 Green Finance Strategy. Although there were some welcome measures, many of the released pages seem to merely recap existing policies and commitments.

- Two of the 44 papers were Sir Vallance's report on innovative regulation in green industries, and Governments response, click here. There were some helpful recommendations on waste and recycling:
  - **Recommendation 8** – Electric vehicle battery recycling. The government should work with industry and regulators to create an appropriate regulatory framework for EV battery recycling to support innovation in this area. This framework should be technology agnostic and factor in recycling by design and should encourage scaling of the technology. The Government plans to consult on this by year's end.
  - **Recommendation 9** – Innovative use of waste products. The government should support the Environment Agency, other regulators and standards bodies, research institutions and a chosen local authority to establish a regulatory sandbox for the innovative use of waste products, with a focus on providing derogations to support innovation on priority waste streams which currently cannot be recycled or re-used due to regulatory barriers. The sandbox could be located in a specific Investment Zone. The Government agrees with the sandbox principle and says they will explore with the Environment Agency.

UK BAT (Best Available Techniques)

There are approximately 460 permitted installations in the UK that may be directly impacted by UK BAT. The range of installation locations across the UK are shown in the table below.

Of these installations it is anticipated that approximately 300 will be impacted by the **Waste gas treatment in the chemical sector (WGC) BAT conclusions**.

Country	Permitted installations	Likely number of impacted installations
England	418	up to 300
Wales	19	~10
Scotland	19	~10
Northern Ireland	4	4

Permitted installations and numbers likely to be affected by the UK BATC for WGC.

The UK BAT WGC Technical Working Group (TWG) held a 3-day face-to-face meeting 25-27 April in Manchester to review D1 BAT conclusions resulting from over 50 comments submitted by CIA and our CIA members. Attendees included the UK BAT team (with all tranche 1 authors present), Defra, SEPA, NRW, NIEA, EA (with additional Industrial permitting experts included), technology providers, CIA and 7 CIA Industrial member companies (Tata Chemicals, ExxonMobil, Lianhetech, Ineos, Syngenta, Inovyn and Johnson Matthey).

Prior to the April TWG the CIA (with support from UKPIA, UK Steel and UK Fashion and Textile) had written to the UK BAT Standards Council in March urging them to withdraw 4 new management system BAT conclusions introduced by the UK BAT team and to review the process generally. Three of the 4 new BATS were subsequently removed (Circular Economy, Climate Change Adaption and Climate Change Mitigation) for all tranche 1 sectors. The Standards Council also gave assurance that the TWG could have extra time if needed to fully debate the new WGC BAT conclusion document.

The UK BAT team prepared a 134-slide presentation for the April TWG which enabled the group to debate all comments made in detail. We were able to get through all the comments with a good healthy debate throughout. There were no 'alternative positions' (known as split views in Europe) and we managed to reach consensus with each item discussed. There was not enough time to run through all the finalised comments or to plan for the RIA (Regulatory Impact Assessment) so an additional 2-day TWG meeting has been arranged for late June. An updated D2 BAT conclusion document was issued on 15 June 15 for review in the late June TWG meeting.

The main changes and outcomes resulting from the April TWG are as follows:

- Aside from removal of the previously agreed 3 BATs mentioned above it was also agreed that the fourth BAT (Chemical Management System) is to be removed and a general management requirement to minimise the use of relevant hazardous chemicals (e.g., by following REACH) to be added instead.
- D1 introduced two further new BATs related to odour management. It was agreed that these will also be removed as requirements are already covered in CWW (Common Waste Water) BAT conclusions.
- CIA (with member support) presented on batch processes to explore ways that non-continuous processes can demonstrate an 'equivalent level of environmental protection'. Examples will be added to the background paper and developed further during implementation.
- CIA (with member support) presented WGC versus Net Zero, calling for more applicability statements to be added to consider cross-media effects. This was not agreed but assurance was provided by regulators that flexibility will be available during implementation to consider cross-media effects and the derogation process is also there as a back stop. It was also agreed that the background paper would reflect the importance of considering cross-media effects to avoid perverse and suboptimal environmental outcomes.
- Any definitions were further clarified (e.g., plant, Installation, OTNOC).
- Quite a lot of actions were captured as 'Implementation Issues'. The regulators are keen to involve Industry to make sure 'cross-cutting guidance' is clear for regulators and Industry to determine how each BAT needs to be applied and complied with (using examples where necessary). This was very much welcomed, and regulators said they would work together to avoid differences in devolved administrations. CIA intends to interact closely with regulators to review and input into their planned updates for UK regulator cross cutting guidance with member support.
- There were clarifications on the WGC scope (e.g., LVIC exclusions added and carbon capture, H2 production excluded from WGC).

In addition to the above Sabic kindly invited the UK BAT team and CIA to their Teesside site for a practical demonstration and review of their LDAR (Leak Detection and Repair) practices to help supplement UK BAT requirements and guidance on diffuse and fugitive emissions, which will be new for many chemicals sites to adopt.

WGC BAT conclusions will be issued for public consultation once finalised (~summer 2023). This will also include an RIA (Regulatory Impact Assessment) which will predict the approximate cost for compliance for UK Industry. The UK BAT team will include planning of the RIA in the June TWG, and we expect them to look for support from CIA and its members to collect cost estimates to comply with WGC BAT conclusions. The potential timeline for the WGC BAT conclusions to be published is now predicted to be early in 2024 at the earliest. The additional TWG meeting has added 2 months to the timeline. Compliance to the finalised UK BAT conclusion will be within 4 years after its publication date (i.e., by early 2028).

EU IED and BREF developments

The EU Chemical Sector Waste Gas BREF (WGC) was published in the European Journal on 12 December, 2022, which started the 4-year clock to comply with new air emission limits for EU members.

The EU LVIC BREF Kick-Off Meeting was held in October 2022. All updates have been communicated to the CIA Environment network. The next step is the development and issue of the LVIC questionnaire to gather emission and performance data from EU LVIC sites. EU Member States had until the end of May to confirm sites that will participate. Over 900 comments were received regarding the draft questionnaire, which will progress through several further drafts prior to planned issue in December 2023 with completed questionnaires due into EU BATIS by mid-March 2024.

The UK LVIC BAT is planned to be in Tranche 2 of UK BAT (no timeline set for review yet, potentially H2 2023). The UK is likely to collect its own data for UK LVIC sites so divergence from the EU BAT conclusions and emission limits is a possibility.

The EU continues to review the IED (Industrial Emissions Directive). Many of the Cefic priorities (as per their 10 point action plan on IED) and proposals look to have landed well. The following key outcomes followed a European Parliament's Committee on Environment, Public Health and Food Safety (ENVI) vote in May.

Permitting:

- Member States may choose not to impose requirements relating to energy efficiency in respect of combustion units or other units emitting carbon dioxide on the site where the installations are covered by the EED.
- Authorities to set the achievable limit values which should take into account cross-media effects and the whole BAT-AEL range.
- Derogations to be documented in permits and reviewed every 5 years.
- A fast-tracking permitting procedure is proposed when applying an emerging technique. This process should not exceed 18 months and the application must be validated by the competent authorities no later than 90 days of receipt.

Management Systems

- Operators will need to implement the EMS by 12 months after the date of transposition. The EMS should be audited and made freely available to the public on the internet.

Innovation

- Derogation for testing of emerging techniques has been increased from 24 months to 36 months.
- The competent authority may set emission limit values that ensure that, within 6 years of publication of a decision on BAT emissions shall not exceed emission levels associated with emerging techniques.

Compensation

- The idea that the burden of proof for private damage claims should not automatically be shifted in the IED is strongly opposed by Cefic and others.

CIA has been asked to present a vision of how Industry would like UK BAT to evolve in the coming years to the next UK BAT Advisory Group planned on 5 July. CIA prepared and issued a draft 'Future of UK BAT' document to the CIA IEP Issue Team for comment. The draft contains key principles and desired outcomes from improved regulatory approaches that would benefit the UK chemical Industry. CIA will be seeking examples from Industry to support proposals and will be connecting with other Trade Associations for comment and input.

Resources and Waste Strategy

In late April HMRC announced tax changes and stated that they will consult on allowing a mass balance approach for calculating the proportion of recycled content in chemically recycled plastics, for the purposes of the Plastic Packaging Tax. The consultation will be launched later this year. The UK Government believes changes to the scheme could help raise funding to promote chemical recycling innovations.

UK Regulator Updates:

Environment Agency (EA)

The number of permits remains static in England (415 in total with 6 new, 8 surrenders and 10 transfers at the end of 2022). At a recent EA national meeting performance of permitted sites was reviewed. Additional regulatory attention is planned for poorer performers (lower band C and below). Other areas of planned focus include Non-Methane Volatile Organic Compounds (NMVOC's) emissions to air (EA said they may look to use OGI cameras to look for fugitive NMVOC emissions at some sites) and hazardous metals in water discharge streams. The EA has been employing Chemical Engineering university placement students and are getting good cooperation from sites to work with them to gain experience. The EA also plans to check on the progress of permit Improvement Conditions for LVOC processes following their EU BREF permit variations.

On 3 April the Environment Agency provided further support for operators on embedding climate change adaptation under the environmental permitting regulations into management systems. The EA expects all relevant sites with an EPR permit to have completed a risk assessment by April 2024 with all sites fully incorporating climate change adaptation planning by 2026. Summary briefing for embedding CC adaptation.

Natural Resources Wales (NRW)

Wellbeing objectives by 2030 in Wales were updated on 27 April: Natural Resources Wales / Our corporate plan to 2030 – Nature and People Thriving Together. Key desired outcomes are to see nature recovering, communities being resilient to climate change and that pollution is minimised.

NRW updated their SROC (Strategic Review of Charges) webpage on March 31swhich includes the latest news – Natural Resources Wales / Strategic review of charging. This follows their consultation on regulatory fees and charges for 2023/2024 where results were published at the end of March (Consultation on our regulatory fees and charges for 2023/2024 – Natural Resources Wales Citizen Space – Citizen Space (cyfoethnaturiol.cymru).

SROC is a major review of permitting fees for Wales to facilitate cost recovery for NRW (currently £3million/year deficit). NRW's subsistence charges will increase by 6% in the following areas:

- Water Resources
- Water Quality
- Non-Nuclear Radioactive Substances Regulation
- Reservoir Compliance
- Flood Risk Activity Permitting
- UK Emissions Trading Scheme
- Control of Major Accident Hazards (COMAH)
- Materials Recycling Facilities.

NRW plans to implement their new charging schemes from 1 July 2023, with improvements and updates to our website, guidance and application forms applied from Monday 3 July 2023.

NRW is planning a survey on climate change progress. Initially it will be sent to COMAH sites in Wales asking about climate change adaption and implementation progress. It is likely to include asking about standards and guidance used, self-assessed progress on implementation, assessing the risk posed by a changing climate and about prioritising those risks. NRW will look at using the results of this type of survey to plan its COMAH interventions in 24/25.

Scottish Environment Protection Agency (SEPA)

COMAH fees will be reviewed for Scotland (and consulted on if they change significantly) – changes to fees are expected in April 2024 at the earliest.

SEPA plans to do more monitoring of 'banned substances' in and around sites.

The SEPA Chief Executive, Nicole Paterson (who joined SEPA in October 2023), is working on a new 5-year Corporate Plan for Scotland (as well as reviewing their annual operating plan).

Environmental Assessment Levels (EAL's)

Phase 2 of the Environment Agency led EAL review sees a further 13 substances with proposed new/changing EAL's. Review of Environmental Assessment Levels (EALs) for emissions to air: second phase – GOV.UK (www.gov.uk). This involves acrylamide, butadiene, cadmium, chromium III, copper, ethylene oxide, hydrogen chloride,

hydrogen cyanide, mercury, methyl chloride (chloromethane), methylene chloride (dichloromethane), nickel and selenium. Changes to EAL's is important for sites that rely on air dispersion modelling to demonstrate air emission acceptability. The Consultation closed on 20 June 2023. CIA responded to the consultation following input from CIA members. EAL2 CIA consultation response.

The Environment Agency are also planning a third phase of EAL updates in the future. After this, they propose to withdraw any remaining existing EALs that were derived using their old, outdated method. To help them determine which substances to consider in the third phase of our EAL update work, they are asking operators to list any remaining substance EALs from the air emissions risk assessment guidance that are relevant to their permit applications.

PFOA in firefighting foams

PFOA (Perfluorooctanoic acid (PFOA), its salts and PFOA-related compounds) in firefighting foams require full cessation and disposal by 4 July 2025.

Guidance and requirements for all Devolved Administrations has been shared with CIA members. Regulators are interested to hear about issues and associated costs.

Medium Combustion Plants (MCP) Directive:

The **Environment Agency** is collecting data and information ready to regulate facilities who will need medium combustion plant permits. During the second half of this year the EA (**and NRW**) plans to request Annex 1 (of MCPD) information via a schedule 61 notice for any remaining relevant installations. They will review and, if necessary, vary the permit at some point during 2024. SEPA has provided a website link for MCP (details of Phase 2 yet to be added). For standalone plant SEPA requires applications by 30 June.

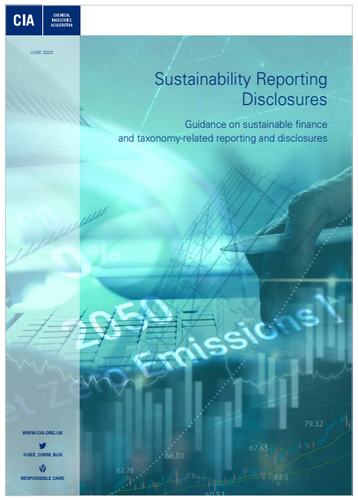
Sustainability

FOR FURTHER INFORMATION CONTACT:

Charis McInnes
07947 687882
McInnesc@cia.org.uk

Sustainability update

At its March meeting, the Sustainability Steering Group (SSG) discussed biodiversity as a priority subject where CIA updated members on the biodiversity policy landscape. The UK government's Environment Improvement Plan (2023) was of particular significance, the first revision to the 25-Year Environment Plan (2018). The document sets out interim targets to halt and reverse nature decline, boost green growth and create new jobs and includes specific targets for reducing different types of waste. Members were advised to browse the then-recently released beta version of the Taskforce for Nature Related Financial Disclosures (TNFD), which aims to develop and deliver a risk management and disclosure framework for organisations to report and act on evolving nature-relate d risks. Due to the interest expressed during the meeting, CIA worked with the Green Finance Institute, a government-funded organisation that is spearheading the development of the TNFD, to deliver a session that explored the new framework and the significance of chemical organisations taking nature into account in their operational procedures and business strategies. While the TNFD is currently a voluntary scheme, its engineers predict it will follow a similar trajectory to that of the Taskforce for Climate Related Financial Disclosures, which the UK government mandated in 2022. It was also conveyed in the previous SSG meeting that members were struggling to comprehend the minefield that is sustainability reporting. As such, CIA have produced a guidance document to summarise a myriad of sustainability



reporting disclosures, outlining their scope and highlighting the benefits and challenges to each reporting method. This has been shared with SSG and is now published on CIA's website.

On what has been dubbed 'Green Day', Government published over 2800 pages of documents outlining plans to improve energy security, green the finance system and make its net-zero strategy lawful. This package contained the eagerly anticipated update to the Green Finance Strategy featuring a slew of ambitious headlines. The first key objective aims to align financial flows with UK climate targets, supporting the UK's commitment at COP26 to make the UK the world's first net zero aligned financial centre. Government pledge to prioritise transparency through the sustainability disclosure requirements; aligning UK policy with international standards such as the International Sustainability Standards Board, which is due to publish its first two finalised frameworks later this month; and by consulting to mandate the UK's largest listed firms to publish net zero transition plans. In regard to providing the tools required for the transformation, the Treasury plan to consult on the UK Green Taxonomy—a classification system that highlights which investment options are sustainable and, by extension, those that aren't—in Autumn 2023 with an additional announcement that nuclear energy will be deemed sustainable. A move to regulate ESG rating providers has begun with a public consultation responded to by the CIA, who argued that for the UK to remain competitive in the green transition and attract investment toward the low-carbon economy, a regulatory regime that focuses on consistency should be put in place. Moreover, the Government have committed to publishing key performance indicators by 2024 to assess how the Green Finance Strategy is being delivered. The second key objective is centred on driving investment in technologies and businesses the UK need to achieve our climate goals. The Government want to give investors clarity and confidence by publishing an array of investor roadmaps. They have already produced roadmaps for heat pumps, carbon capture and storage, and offshore wind and plan to follow with nature, nuclear, heat networks, and the automobile sector in the near future. In addition, the strategy supports blended finance approaches combining public and private funding streams, citing examples such as the UK Infrastructure Bank and the Big Nature Impact Fund.

By contrast, the sustainable finance agenda in Europe is rapidly accelerating, with a number of key updates published in June 2023. At the beginning of the month, the European Parliament agreed on its negotiating position on the Commission's Corporate Sustainability Due Diligence Directive (CSDDD) proposal. The CSDDD sets out to improve corporate governance, risk management, processes of human rights and environmental impacts throughout the value chain and importantly has an impact on non-EU companies that export goods to the EU or who have connections with EU entities. As such, official negotiations between Parliament and Council (known as 'trilogues') can begin to take place, with the final agreement expected by the end of the year or early-2024. The key changes Parliament have asked for cover the inclusion of financial services under the CSDDD—Council want to give member states the right to choose whether to apply the CSDDD to financial services or not, companies to publish a climate transition plan, with larger companies having to adjust directors' remunerations in line with targets being achieved or not; sanctions to include significant fines for EU companies and non-EU companies risking a ban from public procurement in the EU; and for delays in compliance to the obligations depending on company size. In addition, the European Commission has published the first set of the European Sustainability Reporting Standards (ESRS) following the initial draft constructed by the European Financial Reporting Advisory Group (EFRAG). The ESRS indicated the information necessary to understand a company's impact on sustainability matters and how sustainability matters affect the company's development, performance and position—this is known as 'double materiality' and is a key part of the EU's Corporate Sustainability Reporting Directive (CSRD) which non-EU companies who fall under scope will have to report against. The main variations between the version issued by EFRAG and that of the EU Commission are as follows: the majority of disclosures will now be subject to a materiality assessment; a number of disclosure requirements considered more challenging will be phased-in; some disclosures will become voluntary; greater coherence with the EU legal framework and global standards (i.e. ISSB and GRI); and various other editorial modifications. There is a feedback period open until 7 July. CIA intend to discuss this issue with members at the next meeting of the SSG on 21 June, where we can subsequently share our views with Cefic (CIA's European counterpart) who will formulate an industry response. Finally, from the EU perspective, a sustainable finance package has been published to demonstrate how the EU sustainable finance agenda can support companies and the financial sector by encouraging private funding of transition projects and technologies and facilitating financial flows to sustainable investments. The package includes the following:

- The publication of the Tax04 package, which is the delegated act that will outline the Technical Screening Criteria for the final four environmental objectives covered undwer the EU taxonomy.
- ESG ratings regulation.
- Communication on transition finance.
- A staff working document on enhancing the usability of the taxonomy.

The EU is moving fast in the sphere of sustainable finance; it is imperative that the UK keep up with these developments and advance its own agenda to retain a lead in green finance and attract investment to remain competitive.

Furthermore, CIA has been working on a circularity piece to inform the Government's direction in this space with industry insights. We see the importance of being proactive in the circular economy agenda as our industry is not only a user of circular materials for feedstock, but among our membership we also have members who offer recycling capabilities beyond traditional mechanical recycling. Current government proposals demonstrate the prioritisation of taxation as a tool in the UK circularity strategy; nonetheless, due to the high volume of waste exported to other countries from the UK, we would advocate for the use of chemical recycling as a complementary, not competitive, recycling technology to mechanical recycling. CIA see the primary barriers to scaling-up chemical recycling being the lack of any clear mass balance method and the lack of recycling infrastructure. As such, we would call for the adoption of mass balance to give a high level of confidence that what is put into the process truly comes out at the end. It is also necessary to acquire greater public support from Government to boost investment in recycling infrastructure. According to the Government's Spring 2023 tax administration and maintenance, the Government will be consulting later this year on allowing a mass balance approach for calculating the proportion of recycled content in chemically recycled plastics for the purpose of the Plastic Packaging Tax. CIA intends to discuss this in our upcoming SSG meeting so that we can respond to the consultation once it is published with members' views being considered.

A new 20-year plan to secure the world-leading strengths of the UK's semiconductor industry has been unveiled by the government. The National Semiconductor Strategy sets out how up to £1 billion of government investment will boost the UK's strengths and skills in design, R&D and compound semiconductors, while helping to grow domestic chip firms across the UK.

Working in tandem with industry, investment made by the government will drive research, innovation and commercialisation through the sector – helping to deliver products from lab to market.

Over a trillion semiconductors are manufactured each year, with the global semiconductor market forecast to reach a total market size of $1 trillion by 2030. Semiconductors also underpin future technologies, such as artificial intelligence, quantum and 6G.

The strategy focuses on the UK's particular areas of strategic advantage in the semiconductors sector – semiconductor design, cutting-edge compound semiconductors, and our world-leading R&D ecosystem – supported by UK universities from Cambridge to Cardiff and Manchester to Edinburgh demonstrating global leadership in this space.

The Chancellor, Jeremy Hunt has announced £650 million 'war-chest' to fire up the UK's life sciences sector and drive forward the government's priority to grow the economy.

The multi-faceted 'Life Sci for Growth' package brings together 10 different policies including £121 million to improve commercial clinical trials to bring new medicines to patients faster, up to £48 million of new money for scientific innovation to prepare for any future health emergencies, £154 million to increase the capacity of the UK's biological data bank further aiding scientific discoveries that help human health, and up to £250 million to incentivise pension schemes to invest in our most promising science and tech firms.

The Chancellor's £650 million package also includes plans to relaunch the Academic Health Science Network as Health Innovation Networks to boost innovation by bringing together the NHS, local communities, charities, academia and industry to share best practice. It also lays out changes to planning rules to free-up lab space and updates a route for East West Rail (EWR), the new railway line, to improve connections between UK science powerhouses Oxford and Cambridge, bringing more investment to the region.

The package follows the Treasury's Life Sciences Connect conference which the Chancellor hosted on 29 March where he heard first-hand from senior industry representatives about the opportunities and challenges they are facing.

Chemical Industry Awards 2023: A fabulous evening celebrating the UK chemical and pharmaceutical industry

Over 300 business leaders attended the Chemical Industry Awards dinner and presentation ceremony at the Kimpton Clocktower Hotel in Manchester on 15 June.

CIA Chief Executive, Steve Elliott opened the evening by praising the achievements of the industry, the significant contribution it continues to serve the UK economy and notably, the level of political visibility and recognition the sector now has. Steve said: *'We gather again in increasingly uncertain economic times. The optimist in me could point to a number of factors that might suggest the global economy is in OK shape – the majority of the major economies are avoiding recession; the cost and speed of moving materials around the world is improving; China is increasingly emerging from Covid and energy costs have softened. However, many chemical company Chief Executives are concerned about the persistence of inflation – particularly here in the UK – and depressed demand for product alongside the availability and cost of labour. In short, the outlook remains very unpredictable with optimism about the second half of this year based as much on hope as it is judgement. To be fair, Government has played a constructive role – especially in terms of supporting chemical businesses through Covid and the energy security crisis following Russia's invasion of Ukraine. We also welcome the new focus on resilience with the recent creation of a Critical Minerals Taskforce chaired by Business Minister Nusrat Ghani. Our sector sits at the heart of this work and earlier today we held a chemicals specific workshop to identify dependencies, risks and resilience actions.'*

The evening was hosted by comedian and actor Justin Moorhouse, probably best known for his role in Phoenix Nights alongside Peter Kaye.

CIA would like to thank all sponsors. The trophies this year were again made by year 10 students at Bridgewater High School in Warrington, who did a fantastic job with financial support from Solvay.

Congratulations to all the worthy winners of the 2023 Chemical Industry Awards:

Manufacturing & Resource Efficiency Award
Sponsored by: SLR Consulting
Winner: Carbogen Amcis Ltd UK

Young Ambassador Award
Sponsored by: Scientific Update
Winner: Amy Summerton, Sabic UKPetrochemicals

Chemical Industry Service Provider Award
Sponsored by: Chemical Search International
Winner: Altrad Environmental Services Onshore Ltd

INEOS Responsible Care Award
Sponsored by: INEOS
Winner: SABIC UK Petrochemicals

GSK Innovation Award
Sponsored by: GSK
Winner: Croda International Plc

Skills Award
Sponsored by: Cogent Skills
Winner: Vynova Runcorn Ltd

Diversity & Inclusivity Award
Sponsored by: Dow
Winner: Solenis UK Industries Limited

CIA Company of the Year
Sponsored by: CIA
Winner: GSK

Health Leadership Award
Sponsored by: Macnaughton McGregor
Winner: SABIC UK Petrochemicals

Special Responsible Care Award for Process Safety Leadership
Sponsored by: Axiom Engineering Associates Ltd
Winner: GSK, Ulverston

Nick Sturgeon Unsung Hero Award
Sponsored by: CIA
Winner: Mark Hodgson

The Chemical Industries Association celebrates International Women in Engineering Day 2023

On the 23 June it was International Women in Engineering Day and to mark this day the Chemical Industries Association celebrated the achievements and the amazing work that women engineers are doing to support lives and livelihoods every day. It was an opportunity to raise profile of women in engineering and focus attention on the fantastic career opportunities available to girls in this exciting industry.

In honour of this significant occasion, we asked some of our female engineers working for CIA member companies, why chemical engineering?

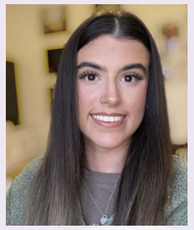
Amy Summerton

Role: Research Chemist
Company: SABIC Petrochemicals UK Ltd.

Back in 2015 upon leaving school I joined SABIC as a Laboratory Technician Apprentice; during my time on 2 different manufacturing assets I quickly learnt that I was more interested in the chemical process side of things. In 2017 I decided to switch career paths a little and completed a HNC in Chemical Engineering whilst working still in the laboratory. Back in 2021 I joined SABIC's Technology & Innovation group and am now based within a team across Europe whilst completing my BEng Chemical Engineering. The thing I enjoy most about my job is not only the opportunity to discover ideas and create new technology but also the chance to work for and with different sites globally. I am currently working on projects to support process improvement to various SABIC assets. This year I have been lucky enough to join SABIC's TRUCIRCLE programme on a project for mixed plastic waste recycling. I am huge advocate for apprenticeships and doing something that does not quite fit the usual path…it's how I ended up in my career today.

Izzy Sloan

Role: Chemical Engineering Degree Apprentice
Company: GSK



Three years ago, I had no idea what a Chemical Engineer was. I chose Maths, Chemistry and Geography A-Levels as I enjoyed the subjects and felt this combination would keep my options open. At age 17, my aspiration was to contribute to making peoples lives better, and at 21 it is still the same. Engineering is the main facilitator of this aspiration. I applied for my apprenticeship not really knowing much about Chemical Engineering- I learned much more about it during the interview process. To my surprise I was not going to be working in a lab! I have worked at a Primary and Secondary antibiotic manufacturing sites within my apprenticeship so far. Fundamentally, my role surrounds problem solving. I am in the Process Safety team but I also have involvement in projects. Alongside this, I am currently working towards a BEng Hons in Chemical Engineering through day release, involving both exams and coursework. I think this variety in my role is what interests me so much about my job- Chemical Engineering is a brilliant transferable degree. Currently, I am using my skills to contribute to the creation of antibiotics for patients, but I could use them in any other sector in the future.

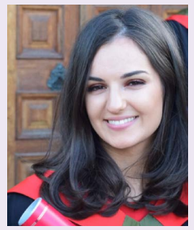
Thet Su Aye Chan

Role: Project Engineer
Company: Solutia UK Ltd, a subsidiary of Eastman Chemical Company

Back in 2015 upon leaving school I joined SABIC as a Laboratory Technician Apprentice; during my time on 2 different manufacturing assets I quickly learnt that I was more interested in the chemical process side of things. In 2017 I decided to switch career paths a little and completed a HNC in Chemical Engineering whilst working still in the laboratory. Back in 2021 I joined SABIC's Technology & Innovation group and am now based within a team across Europe whilst completing my BEng Chemical Engineering. The thing I enjoy most about my job is not only the opportunity to discover ideas and create new technology but also the chance to work for and with different sites globally. I am currently working on projects to support process improvement to various SABIC assets. This year I have been lucky enough to join SABIC's TRUCIRCLE programme on a project for mixed plastic waste recycling. I am huge advocate for apprenticeships and doing something that does not quite fit the usual path…it's how I ended up in my career today.

Monika MacNeil

Role: Medical (& Infrastructure) Technical Plant Manager
Company: Orbia, Koura Global (Fluorinated Solutions)



At school, I had a special affinity for the sciences – specifically chemistry and mathematics. I enjoyed working out the 'how' and the 'why' things worked. I chose engineering as it is such a dynamic field, vast enough that anyone can find their unique speciality.

I wanted my career path to start off and grow in a direction which challenged the global understanding within science, engineering, and technology. This was harmonised with my desire for changing lives and helping the world transition to a better, greener version of itself. The innovation behind each engineering occupation has an impact in shaping the future. Even non-technological industries rely heavily on professionals with STEM skills as technology is becoming even more prevalent. Women have been at the forefront of some of the most extraordinary engineering innovations. Although we have come a long way, there is still a gender gap in STEM careers – particularly in engineering. At a time when engineering continues to transform the way we live, work, and learn, women are needed now more than ever to close this gap.

Hannah Mohsen

Role: Production Engineer
Company: Solutia UK Ltd, a subsidiary of Eastman Chemicals

I always knew I wanted to work in something related to science, and my brother suggested I looked into Engineering as a career path. While researching engineering in general my friend's mum introduced me to Chemical Engineering and I was hooked. I went to the University of Sheffield, and while studying for my Masters I was offered a job at Eastman where I had done a year placement. Since joining two years ago, I have worked as the Production Engineer on two production plants, and I am now working on a multi-million pound project as the process expert. From day one, the team of operators and day staff have always made me feel welcome and pushed me to be the best that I can be, which has allowed me to grow well beyond what I could expect straight out of University. I am now involved in an employee group as the point of contact for 14 locations across the EMEA region to help with organising activities to encourage the professional development of employees. Through this I have been able to continue to push myself and challenge myself to come up with solutions that can be implemented in multiple different countries.

#MakeSafetySeen

INTERNATIONAL WOMEN In ENGINEERING DAY
23 June 2023

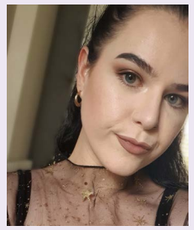
Madison Livens

Role: Electrical and Instrumentation Technician
Company: Koura Global Runcorn

I started my interested in engineering through spending a week at my dad's workplace during high school work experience. I found it thoroughly interesting to see fully trained EI technicians come across varying issues and resolve them in a timely manner, so that production could continue, with as little down time as possible. Although a long way from being qualified at the time, I knew I wanted to learn the skills to be able to contribute in the same way. Through training and landing a job I love, I am now in the same position as those technicians from years back, helping Koura keep production running, and it satisfies me to see how far I have come and the help I contribute to our team to keep the site running daily.

Josephine Campbell

Role: Automation Engineer
Company: LANXESS



I initially chose Chemical Engineering as a career path due to an enthusiasm for maths and chemistry in school. A chemistry teacher suggested it to me as an option and the idea of being involved in industry was appealing. It seemed to have the potential to offer more daily variation than some other professions, a fact I have since learned is true as personally, I find it's rare to have 2 days that look identical. However, what I didn't plan for at that age was to completely pivot in career direction after a few years of working as a project engineer!

During my time as a project engineer I was responsible for all aspects of design and installation and as a result, I was exposed to control systems, something I had somehow never really considered in detail. As time went on I realised I was incredibly interested and enthusiastic about plant automation and control and began working towards a career in automation.

I find automation engineering to be diverse in subject matter, interesting, challenging but most importantly rewarding. The process of working through a problem to come to the right automated solution or finally solving a hardware issue is so enjoyable to me and I feel vastly lucky this is the career path I've found myself on.

Laura Grindey

Role: Chemical Engineer
Company: Eternis Fine Chemicals UK

When I was younger, the manufacturing industry just existed, and I never really thought about who built these sites. This changed when I started thinking about university. I thoroughly enjoyed maths and chemistry at school which pushed me towards a dual honour's degree. However, my maths teacher recommended chemical engineering as a option having completed a chemical engineering degree himself. Getting into the University of Sheffield was a huge achievement for me and really motivated me to succeed as a chemical engineer. I felt so driven to gain knowledge and experience that I sent my CV to a company's sales department in first year hoping someone in the company would organise a placement for me! Despite all odds, it worked! At university, committees and societies were also a huge part of my life. This is something I've kept up after university by engaging with both IChemE's National Early Careers Committee and European Young Engineers. I am so grateful to have core roles in these committees so I can promote engineering and engage with a worldwide network of engineers. In my current role, I enjoy the variability I get; I've been able to install site modifications, build and lead the continuous improvement system, and trial process changes on our existing plant. There is so much a chemical engineer can be… a commissioning manager, a process safety advisor, a design engineer and at Eternis Fine Chemicals, I feel I get to experience this all.

Alex Wright

Role: Engineering Graduate
Company: Croda

I have always been surrounded by engineering one way or another growing up, whether this was building bird boxes next to my dad in the garage with my own little toolkit or exploring science parks on a weekend. This naturally made me curious about how things work and how they can help people and solve problems. To continue to develop myself and my knowledge, I knew I needed to gain a wide range of experiences and I sought out opportunities within research, manufacturing and innovation. Each of these roles, though vastly different were all a form of engineering and motivated me to pursue a career as an Engineer, this continually provided me new challenges.
In my current role within a Global Safety, Health, Environment and Quality Team I drive world-wide projects covering a range of topics from safe control of work to the specialised engineering branch of functional safety. I enjoy the variety of work and collaborating with people from different backgrounds and cultures, many of whom have become my mentors and role models, as they continually inspire and motivate me on my personal and professional journey.

Bryony Merrall

Role: Process Improvement and Control Lead
Company: Tronox, Stallingborough

When I was at school, my interests and skills were based more towards the sciences; I liked the logic and the clarity of those subjects. I really had no idea what I wanted to do as a career and so when I picked my A levels I chose my strongest subjects, but tried to keep my options open. I picked double maths, physics and chemistry. When it came to applying for university I had decided that a degree that was purely maths or chemistry would not keep me engaged and my brother, a mechanical engineer, suggested that I look at engineering degrees. The application of the subjects I enjoyed and a chance to do practical troubleshooting and design physical equipment really appealed to me. I did work experience on a manufacturing facility and loved the hands on side of the work. I am now a chartered chemical engineer and through working in STEM I get to work with a diverse group of people and see my work put into practice.

Gugulethu Masuku

Role: Process Engineer
Company: LANXESS, Widnes site

I always had science-based toys, chemistry sets and games about building things. This is where I believe my curiosity of 'how useful things can be made from useless materials' came from. I chose chemical engineering because I am interested in the processes behind how the things we use every day are made. One simple product could have 10 different processes behind it and look completely different from its original source, all before it reaches the end consumer. The variety and the complexity of the profession is why I love being a process engineer.

Clamp-on flowmeters deliver reliable – 215°C steam measurement

With the ability to handle incredibly high-temperature and high-pressure fluids such as superheated steam, non-invasive clamp-on ultrasonic technology is taking away the worry of downtime for plant operators looking for an accurate measurement solution, without the risk of contamination. Because flowmeters are safely attached to the outside of the pipe, there's no need for any process interruption whatsoever.

Measuring the flow rate of high temperature steam with ultrasonic flowmeters demands the use of the cross-correlation method rather than the more commonly used transit-time difference principle. Two pairs of ultrasonic transducers are mounted on the pipe at a defined distance from one another, forming two acoustic measurement barriers. The ultrasonic signals radiated into the pipe are modulated by the vortices of the turbulently flowing fluid, and because the vortices are carried along by the flow, they pass through the two measurement barriers with a time delay. By cross-correlating the modulation signals over time, the flowmeter is able to determine the flow velocity of the steam and calculate the mass flow based on the geometry of the measuring point and the physical parameters.

Avoiding a plant shutdown

At a German waste-to-energy plant, it is a fundamental belief that waste should be seen as a precious resource. Recycling the waste of well over a million people, operators were struggling to deal with increasing measurement errors from their existing inline ultrasonic measurement system, installed in the inlet to a turbine. The measurement is required for balancing, as well as to protect the sensitive turbine from excess steam.

System technicians needed an effective replacement measurement technology that would take little effort to install, and not disrupt processes – because if the pipeline needed to be opened, the entire waste incineration plant would have to be shut down.

Invaluable on-site testing prior to installation

A key advantage of non-invasive clamp-on flowmeters is that suitability can be tested onsite before installation takes place, and modifications can also be made at any time if necessary. This meant that service technicians were able to adapt the installation and the transducer technology, while the developmental engineers at the company's headquarters analysed measurement and diagnostic data.

With clamp-on ultrasonic technology now permanently installed, the waste-to-energy plant has the benefit of precise and reliable steam quantity measurement, which completely replaces the old inline measurement that was prone to failure.

For more detailed information on the benefits of non-invasive ultrasonic flow measurement in the measurement of steam, contact Simon Millington – www.flexim.co.uk | sales@flexim.co.uk +44 (0)1606 781 420

FLEXIM
when measuring matters

The Synergy Project

Founded in 1987, Catalyst Science Discovery Centre and Museum explores the science and technology of the chemical industry and its impact on society past and present. We inspire young people, offer educational opportunities to a range of audiences, support wellbeing and we are a unique community hub. We are a charitable trust and an accredited museum and hold a vast archive from the chemical industry and its people, as well as the local social history of the area surrounding Catalyst, where the chemical industry flourished for over 170 years.

Development funding of £99,500 has been awarded by The National Lottery Heritage Fund to help us progress plans to apply for a full National Lottery grant in early 2024. This project, named Synergy, will help us to redevelop gallery spaces and produce programmes to enable our heritage offer to become accessible to new and under-represented audiences in an exciting and meaningful way.

Sir John Brunner

Our current Birth of an Industry gallery was installed in 1996. It tells the story of the origins of the chemical industry, which fundamentally shaped the local area. However, it currently provides a general and global history rather than foregrounding local stories and whilst the history it relates to is highly important to the area, the gallery is old-fashioned, text heavy and is the least visited part of our offer.

The 4th floor Observatory gallery was last refurbished in 2000 and houses exhibits that link to the surrounding area or general environmental issues. It is used for bridge building and local history workshops for local schools, sleepovers for uniformed groups, heritage afternoon teas and for corporate events.

The Synergy project recognises the need to deliver a coherent scheme for the whole building that addresses orientation around the building's four floors, makes the best use of transition spaces and creates links between the science and heritage elements of our organisation – the then and now.

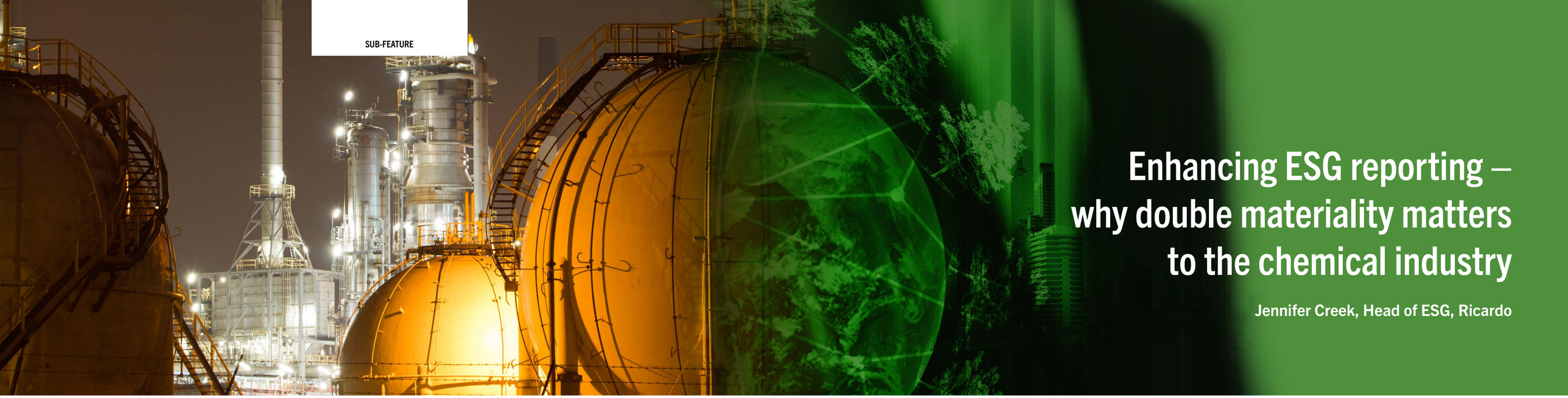
An essential element of this project is the opportunity to build on previous successful outreach and co-creation work and fully engage with our target audiences and the local community in the development and design of our heritage programmes and new exhibitions. It will allow us to engage people in a much more interactive and relevant way and build on the interest that we know exists.

Historically, the NorthWest and Widnes in particular, has always been perceived as an unpleasant, smelly industrial area, leading to feelings of mixed emotions about the heritage of the area. This project will allow Catalyst to provide a context and tell all the stories – the good and the bad. Synergy will give people the opportunity to see this as part of their identity in a new light and raise pride in the area knowing its global significance and importance and how it has impacted the modern world.

Do you or your company have any artefacts or memories to share that would help us tell the story of the chemical industry – your industry?

Please contact Meryl Jameson, Marketing Manager on 0151 420 1121 or email meryl@catalyst.org.uk

catalyst
SCIENCE DISCOVERY CENTRE AND MUSEUM



Enhancing ESG reporting – why double materiality matters to the chemical industry

Jennifer Creek, Head of ESG, Ricardo

Materiality is a key principle used to determine what ESG (environmental, social and governance) considerations really mean to your organisation and how they align with your business strategy.

Materiality assessments are an essential part of sustainability reporting requiring engagement with internal and external stakeholders and the results clarify which opportunities and risks should be prioritised for action.

There are two types of materiality used for sustainability reporting – impact materiality and financial materiality. What's 'material' depends on the issue, the context, the time frame and the stakeholder.

Impact materiality looks at a business's impact on the economy, environment, and society. Impact materiality is usually associated with sustainability for the benefit of multiple stakeholders such as investors, employees, customers, suppliers, and local communities, showing how organisations can have a more positive impact on the world. The Global Reporting Index standard applies an impact materiality perspective.

Financial materiality looks inward at the impact on the organisation's enterprise value as a result of the economy, environment, and society. Standards looking at financial materiality include the International Sustainability Standards Board, the Sustainability Accounting Standards Board, the International Financial Reporting Standards and the Task Force for Climate-Related Financial Disclosures.

The integration of the two types of materiality, with equal importance, is referred to as **double materiality** and provides a more holistic view of risks and opportunities by considering issues from more than one angle. Whilst financial materiality has been the focus for annual reporting, the environmental impacts of an organisation are, or can become, financially material over time so an assessment can be a strategic tool for horizon scanning.

A double materiality assessment is an important first step to help your business set a robust ESG strategy and provides a window into a company's most relevant risks and opportunities along the global value chain. Results should be widely communicated with stakeholders and should form the basis of reporting.

Mandatory reporting

The EU Corporate Sustainability Reporting Directive (CSRD) requires that in-scope companies report on a double materiality basis against a set of sector agnostic European Sustainability Reporting Standards (ESRS), developed by the European Financial Reporting Authority Group (EFRAG). The European Commission has published the delegated act adopting the first set of ESRS that companies must use to produce their sustainability reporting in accordance with the CSRD, and therefore legally binding. This first set of ESRS are sector-agnostic, applying to all companies under CSRD scope. The European Commission is expected to adopt delegated acts for additional sets of standards, including sector-specific standards, proportionate standards for listed SMEs, and standards for non-EU companies expected by June 2024. The second set of draft ESRS, including sector specific standards for chemicals, are expected to be published for consultation late in 2023 before being adopted in June 2024. EFRAG have identified chemicals as a CSRD priority sector, with a significant focus on the materiality topic of water/marine and pollution, in addition to supply chain due diligence for the upcoming Corporate Sustainability Due Diligence Directive. This will be a world first creating a regulatory chemical sustainability-related disclosure standard that applies the double materiality concept.

Typical material issues for the chemical sector

A materiality assessment is unique for every organisation but there are common issues across the chemical industry. Figure 1 is an example double materiality matrix for a fictitious (but typical) chemical company.

In the top right are the most material issues (from an impact and financial perspective). The top left presents issues that are more material from an impact rather than a financial perspective. The bottom left 'minimal' and 'informative' shows issues that are less material from both perspectives. All issues can change over time and sudden changes can occur – materiality assessments should not be a one-time only process.

The matrix reflects that the most critical issues – key to all its stakeholders – are sustainable products and services and supply chain, closely followed by significant environmental issues: biodiversity, climate change and emissions and environmental impact, circular economy and energy efficiency and consumption. In this case, the social issues of supply chain and occupational health and safety were also critical – important from a financial materiality perspective.

Double materiality assessments:

- Provide deeper insights into the company's operating environment,
- Inform and contribute to forward-looking horizon scanning
- Confirm the most critical issues to both your business and stakeholders
- Enable more strategic and effective focus and resource allocation.
- Can be used as an effective internal communication tool to drive focus from board to employee level

Conducting a double materiality assessment can be complex and time consuming especially in the chemical sector with its exposure to the risks and opportunities in the value chain including a wide range of downstream markets. However, organisations that use this approach correctly, prepare early, and embrace the insights that a double materiality perspective provides can be confident that they are focusing on the right issues to drive strategic benefits whilst anticipating future emerging issues.

Ricardo's team of ESG experts can support you with your ESG journey including double materiality assessments and the development and implementation of a robust ESG and sustainability strategy. Our tried and tested approach to double materiality assessments ensures an efficient process that aligns with frameworks such as TCFD. Our strategic advice is backed up with 50 years' experience in the chemical sector and deep technical expertise in key issues including climate change and decarbonisation, the circular economy, social value, chemical regulation, sustainable products, energy, biodiversity, water, supply chain management and chemical safety.

Contact us at enquiry-ee@ricardo.com or find out more at http://www.ricardo.com/CIA

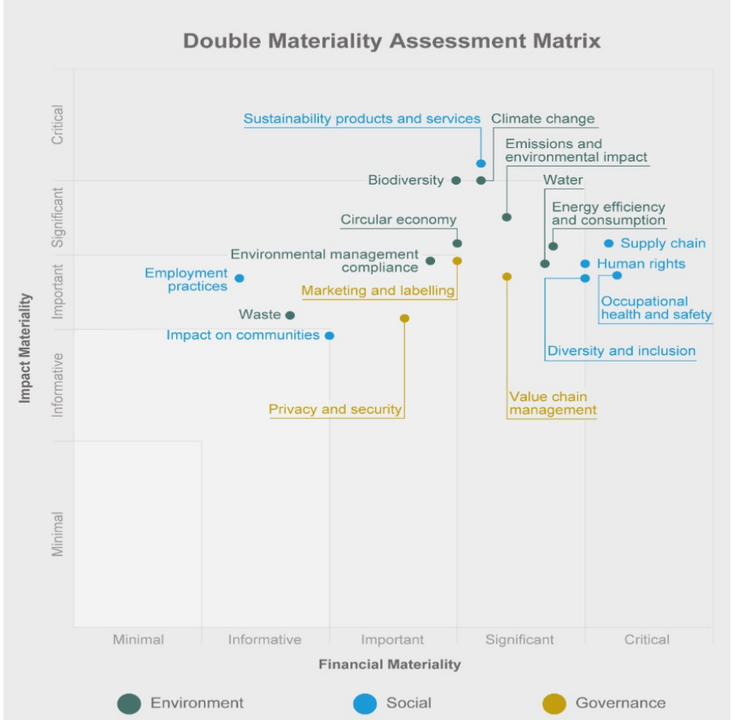


Figure 1: Example of a double materiality matrix for a fictitious chemical company

CIA hosts Current Landscape and Emerging Issues event jointly with REACHReady

Once more, April saw the hosting of the joint CIA and REACHReady conference on "UK REACH: Current Landscape and Emerging Issues". A popular annual event, the CLEI 2023 conference explored a variety of issues related to current chemical legislation and the future of UK chemicals policy, with a collection of speakers from regulators and industry to share their thoughts, knowledge and expertise on these important topics.

Our opening presentation was from the Health and Safety Executive's Rebecca Inight, who provided feedback on the HSE's activities acting as the Agency for UK REACH. The presentation included valuable information regarding registration under UK REACH, including the Article 26 Inquiry process, a brief walkthrough of the NRES (New Registration of Existing Substances) process, and advice for UK companies wishing to claim the lead registrant role under UK REACH.

Remaining with the regulators, the next presentation came from the Department for Environment, Food & Rural Affairs (Defra). Whilst HSE acts as the Agency for UK REACH, Defra oversees the UK REACH policy and service. James Dancy gave CLEI attendees an update on the progress of the ATR, or Alternative Transitional Registration model, and the extension of the UK REACH transitional deadlines. The Defra presentation also covered the process of introducing new Authorisations and Restrictions under UK REACH, reviewed the priorities identified in the 2022/2023 UK REACH Work Programme and gave a brief overview of the UK REACH Improvement Project being overseen at Defra.

The next section of CLEI covered three different viewpoints on the implementation challenges that UK REACH posed to industry, starting with Darren Abrahams of Steptoe LLP to provide a legal perspective. The Steptoe presentation examined the transitional arrangements surrounding registration under UK REACH, their relation to data protection under EU REACH and how both topics continue to influence UK companies' approaches to registration.

Our next presenter came from Steve Hollins at Tronox Pigments, who provided a view of both the challenges UK REACH implementation poses to chemical manufacturers and the opportunities for the UK chemical industry to have a regulation that was "proportionate, pragmatic, simple & workable". Tronox's presentation highlighted the need to retain a high level of protection for human health and the environment, whilst avoiding unnecessary duplication and costs.

The final presentation in our section on implementation challenges came from REACHReady Approved Service Provider WSP, where Mick Goodwin identified the challenges WSP had faced as a consultant working under UK REACH. As well as a brief overview of the transitional periods, the WSP perspective covered the use of the "Comply with UK REACH" service, divergence from EU REACH and outlook on the future of UK REACH in relation to data ownership and the ATR model.

After the Q&A session with our first session presenters and a short comfort break, CLEI delegates returned to our second session, opening with a SME perspective on what a workable UK chemicals regime could look like. Adrian Hanrahan from Robinson Brothers shared with our audience a review of challenges specific to the SME community, the expectations this set of chemical industry businesses have for the future of UK REACH and what they are keen to avoid in the development of the UK Chemicals Strategy.

Following the SME viewpoint delegates received another presentation from Defra, this time from Mary Tomlinson, who provided us with an update from the regulators on UK Chemicals Strategy development. The Defra Chemicals Strategy presentation covered the past work in the 25 Year Environment Plan, external stakeholder workshops in summer 2022 and the Environmental Improvement Plan, before giving a brief overview of the further stakeholder engagement leading up to the planned publication of the Chemicals Strategy in late 2023.

Rounding off the section on Chemicals Strategy, the CLEI audience next heard from Johnson Matthey's Nissanka Rajapakse, who highlighted the efforts required by multinational companies in adhering to multiple different chemical legislations throughout the world, each with their own processes and requirements. The Johnson Matthey presentation promoted an approach that addressed the current uncertainty within UK REACH, with the opportunity to "secure a more workable and targeted regulatory system", considered that any divergence must be purposeful, and that the UK must engage internationally to increase harmonisation.

The final section of CLEI addressed important and notable developments within EU chemicals regulation. The influence that the EU continues to have on the UK chemicals regime is undeniable, and the final two topics were from our colleagues at Cefic, the European Chemical Industry Council. Patricia Muñoz gave an overview of the U-PFAS restriction (universal restriction of per- and polyfluoroalkyl substances) proposal under EU REACH, as well as the work and advocacy of the Cefic sector group FPP4EU (FluoroProducts and PFAS for Europe) and advice for engaging with the ongoing EU consultations.

Our final presentation was from Cefic's Liisi de Backer, covering the new hazard class additions to EU CLP, as well as how this development links with the ongoing revisions of the EU CLP core text and EU REACH under the EU CSS (Chemical Strategy for Sustainability). The presentation covered an overview of the new hazard classes, the transitional periods allowed for implementation and next steps for these hazard classes, including guidance development at EU level, and ongoing discussions at international level for inclusion into UN GHS.

Following a second Q&A session with our panellists, closing comments for CLEI were provided by Roger Pullin, Head of Chemicals and Health Policy at CIA and REACHReady Consultant, with thanks to all of our attendees and speakers for an engaging event filled with information and discussion.

Health and Wellbeing

FOR FURTHER INFORMATION CONTACT:

Roger Pullin
07951 387317
PullinR@cia.org.uk

Aila Bursnall
07951 386926
BursnallA@cia.org.uk

WORKPLACE HEALTH

Health and Safety Executive (HSE) updates

- **HSE 'Asbestos and You' Campaign:** The campaign launched in March continues and remains targeted towards people working in construction trades to help them manage the risks associated with asbestos. More information can be found on the campaign website.

- **New Online Guide on Managing Health & Safety:** A new step-by-step guide has been developed by HSE to help businesses quickly understand what they must do to comply with health and safety law. This promotes the use of the Plan, Do, Check, Act approach to manage health and safety risks. The guide is available on HSE's website.

REMINDER – Di-isocyanates training requirement

By 24 August 2023 mandatory training is required for workers handling di-isocyanates. This is a mandatory requirement under UK-REACH (and also EU-REACH – date is the same for both legislations since the EU restriction was adopted prior to the UK leaving the EU). The training requirements are set out in paragraphs 4 and 5 of Annex XVII of the restriction. Under this REACH Restriction, the supplier must ensure training relevant to particular products they supply is available to their customer company. for the purpose of compliance, the company (customer) needs to maintain a record that the user has successfully completed training before using the substance. Training should also be reviewed at least every five years, as well as being reviewed when there is any change in the work process. The EU-wide training platform provided by the European sector groups ISOPA and ALIPA is available to businesses.

Mental Health charities renew partnership working

In May, the charities Mind, Scottish Association for Mental Health and Inspire recommitted to working together, collaborating across fundraising, communications and influencing policy on mental health. According to the press release, they will *"work together on various projects across anti-stigma work, campaigning and influencing, welfare reform and policy development"*. This will include:

- The prevention of mental health inequalities, including promoting the needs of people living in poverty;
- Supporting and promoting the needs of young people, particularly young women, those who have experienced trauma, and other priority groups for suicide prevention;
- Workplace wellbeing;
- Early support for people experiencing mental health problems and building community resilience;
- Promoting sport and physical activity; and
- Provision of quality assured mental health information.

New Guidance from EU-OSHA: working in heat

Now that we are in the summer months, the European Agency for Safety and Health at Work (EU-OSHA) has released a new 'Napo' clip – Napo in…Too hot to work! and also published guidance Heat at work – Guidance for workplaces. According to the Agency, these provide practical guidance on how to manage the risks associated with working in heat.

EU Asbestos Directive revision

The European Commission is looking to revise the EU Asbestos Directive. Under the ongoing EU Trialogue process, the European Parliament' Employment Committee has now adopted in its report a value of 0.001 f/cm3 for asbestos with a transition period of 4 years from a value of 0.01 f/cm^3. The limit in the European Commission's legislative proposal is 0.01 f/ cm3, which has been accepted by the EU Council. If the European Parliament's Employment Committee proposed reduced limit value is adopted in the final legislation, there may be impacts on EU chemical sites that have asbestos on their premises. It is also thought such a limit value may be difficult to achieve.

CIAmatters SUMMER 2023

CIA HEALTH LEADERSHIP CONFERENCE 2023

CIA's annual Health Leadership & Wellbeing Conference in the Chemical Industry took place 20 June 2023 in Leeds. The day was well attended, but we could still welcome more members, so we certainly hope to see more of you at next year's conference!

This year's programme built upon CIA's previous conferences and our successful series of Signpost Guides that have been developed by members for members (topics: drug and alcohol policy, mental health policy and menopause policy).

There was an incredible line up of speakers coming from our sector's regulator the Health and Safety Executive (HSE) as well as member companies SABIC, INEOS Inovyn, Innospec Inc., Syngenta and Stepan. We would like to thank our speakers for taking part. By sharing relevant good practice, and being proactive in workplace health we can benefit the health of our best resource – our people!

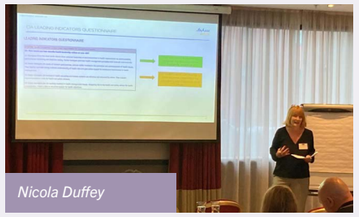
At the start of the day **CIA's Dr Roger Pullin, Head of Chemicals and Health Policy**, welcomed delegates and presented slides on the work CIA does under its Health Leadership Strategy before handing over to the first speaker of the day **Mike Calcutt Head of Health & Work at the HSE**. Mike gave a detailed presentation on their approach to measuring health risks, especially stress, which is now more common in the workplace increasingly caused by external factors.

Mike Calcutt

The Conference aimed to raise awareness of the Tool's usefulness to businesses, provide a guide on how to use it, and to take the opportunity from engagement sessions to identify new ways of working and find further good practice examples. Our member companies presented on their work and approach enabling the more extensive spreading of good practice. **Nicola Duffey from SABIC** focused on Health Leadership Culture to help deliver a healthy workforce. This was followed by **Leanne Mountford from INEOS Inovyn** who set out the framework for occupational health teams to communicate with their workforces. Similarly, **Viv Dennis from Stepan** highlighted the benefits of free

Left to right: Roger Pullin, Mike Calcutt, Nicola Duffey, Viv Dennis, Peter Shields, Leanne Mountford, MacNaughton & McGregor, and Stephan Smith

independent surveys into wellbeing initiatives and employee engagement in directing wellbeing initiatives through Health advocates



Nicola Duffey

Leanne Mountford

or Workplace Forums.

In the afternoon, **Peter Shields from Innospec** shared how he uses our **Sustainable Health Metrics Indicator Tool** to measure Hazards and exposures. Finally, **Stephan Smith from Syngenta** discussed and shared detailed examples of how to measure

Peter Shields

Stephan Smith

health indicators.

As the responsibility of employers grows in this area we will continue to ensure that latest issues and developments are shared across our whole membership.

The conference also featured a role play demonstration by **MacNaughton & McGregor** (also known as the 2Macs) of a performance-based interview with its roots in health issues affecting an employee's ability to do their job. They presented 'A Living Case Study' exploring mental health & wellbeing to help us all better engage with the challenge of initiating what are often difficult conversations to have with colleagues. The 2Macs are known for their fun drama-based learning techniques engaging with delegates, so it was fantastic they could join us to reflect on this serious health challenge that affects all businesses.

MacNaughton & McGregor

The feedback we received from delegates was excellent and we are grateful to all who attended and participated.

ChemTalent

FOR FURTHER INFORMATION CONTACT:

ChemTalent
CHEMICAL INDUSTRIES ASSOCIATION

www.cia.org.uk/chemtalent
chemtalent@cia.org.uk

Izzy Sloan's term as Young Ambassador has come to an end with Amy Summerton from SABIC UK Petrochemicals announced as her successor at the 15 June Chemical Industry Awards. On behalf of the whole CIA team, we would like to thank Izzy for doing a fantastic job during her "Ambassador year". We hope that through her continued engagement and Amy's new leadership, ChemTalent can further increase engagement and participation from member companies to help the network continue influencing the next generation through promoting our industry in a positive and engaging way.


Amy Summerton

Looking ahead

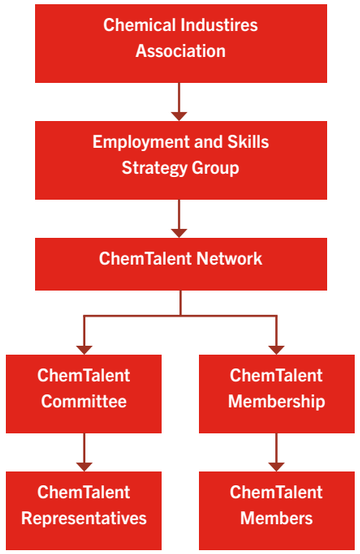
In seeking to attract future talent we have been looking at balancing our communications between being clear about the very real threats we face versus our need to attract future talent. A vital part of this is our ChemTalent network. Under the recent leadership of Izzy Sloan from GSK, ChemTalent has been focusing on influencing the next generation and spreading knowledge of the chemical industry by:

- Promoting the sector
- Changing perceptions
- Helping to bridge the skills gap

However, ChemTalent can only do this with industry support. The network would like to improve engagement with the wider network, which includes early careerists in member companies, students and graduates. The wider network can engage through ChemTalent newsletters, where influencers provide an update on their work, surveys, events, key dates, social media and STEM news.

ChemTalent Structure

For the last couple of months a lot of work has gone into reviewing and defining ChemTalent priorities, purpose and goals. That said, there are a few changes to the ChemTalent structure, mainly around the two groups within the network which are necessary to clarify. You will notice that ChemTalent influencers are now referred to as representatives who sit at the ChemTalent Committee and the wider network now known as the ChemTalent membership. We hope that this change can increase engagement and participation from member companies.



CIAmatters SUMMER 2023

STEM Guide

In June, ChemTalent published its STEM Guide, which contains useful information for organisations and schools who may need help starting their own STEM programme and activities. The guide highlights key information such as how to become a STEM ambassador, links to useful websites with further training/activities and case studies from multiple companies on what they do for STEM. This guide also aims to showcase the various activities chemical companies do to promote STEM and help bridge the skills gap. If you would like to include a case study from your company, it's not too late! For further information or if you would like to take part please contact chemtalent@cia.org.uk.

Meet our new ChemTalent Representatives

Amy is not the only new joiner to ChemTalent. This month we welcome seven more ChemTalent Representatives who will help mapping the direction of the group. To get to know them better, we will soon publish a Q&A with all new representatives on the CIA website, so look out for ChemTalent socials this month.

They are:

Alex Gilbanks-Miller
Day Chemist at Stepan

Hannah Mohsen
Production Engineer at Solutia

James Wright
Inbound Logistics Officer at Solenis

Jonathan Vincent
Process Engineer at INEOS Technologies

Scott Gorman
Development Scientist at Croda Europe

Thet Su Aye Chan
Project Engineer at Solutia

Thomas Nesfield
Environment & Safety Engineer at Campact

Communications

FOR FURTHER INFORMATION CONTACT:

Diana Tamayo
07885 831615
TamayoD@cia.org.uk

Simon Marsh
07951 389197
MarshS@cia.org.uk

GOVERNMENT AND POLITICS

There are only a few days until the Summer recess and plenty of business to get through. The upcoming by-elections will put off any holiday plans for the country's politicians and likely ensure a few sleepless nights. For Sunak, 25 MPs from the 'Red Wall' seats have established the 'New Conservative Group', aimed at pressuring the PM on issues surrounding immigration. Meanwhile, Labour will continue with its efforts to prove itself as an election-winning force. With both by-elections taking place on the 20 July, the pressure to win, both internally and for the country, is mounting.

Back in May, ahead of the King's Coronation, much of the media attention focused on the council elections. The challenge for both main parties is that local elections can bear very little resemblance to what happens in the next general election. That month, we saw the Conservatives realise their worst expectations with a total loss of 1,063 councillors along with relinquishing control of 48 councils. All of this does not automatically mean we are on course for a Labour Government despite them adding 19 new councils and over 500 new councillors. Despite this progress, Labour would be just under 30 seats short of a majority in a general election, if the same voting patterns and areas were followed. The Liberal Democrats had a successful election-winning 12 additional councils.

Opinion polls show Labour's double-digit leads growing – not narrowing, as many Conservative MPs had hoped would happen by now – while the bleak economic backdrop of stubborn inflation and soaring interest rates has prompted fears that Sunak's likelihood of delivering a victory at the next general election is now even slimmer than it was just a few months ago.

As a result, CIA work across Government and the wider political field has centred on reacting to the Budget and preparing for the Chancellor's Autumn Statement. We have begun work on what we would like to see in the Chancellor's Autumn Statement and have met with his team to begin discussions. Popular gossip is growing that this will mark the financial action by the Government that signals a forthcoming general election. In strict technical terms, the Conservatives have until January 2025 to hold that election, with our current view being that it will be held any time between next April and autumn 2024. If we are right, then that would mean the Chancellor would have to use his Statement (expected late October/early November) to present 'give-aways' to the electorate. Like any business organisation, we will be making clear that endangering private sector competitiveness and growth with additional costs to fund 'voter reach-out' is both irresponsible and unsustainable.

Alongside our engagement with Government, we have also stepped up our contacts with the Opposition, having conversations with the shadow Business Secretary Jonathan Reynolds and the shadow Chancellor Rachel Reeves. We are keen to help the Opposition better understand the industry and our needs that we hope will attract investment. In this respect, we are very much behind their commitment to an industrial strategy with better departmental and regional connectivity underpinning that approach. Our Scottish member site interests are also increasingly relevant for Labour as they seek to take many seats from the SNP. We are also meeting with Party officials. At the moment, opinion polling suggests Labour will win the general election, but things can change, hence the need to maintain our cross-party relations.

As part of our pre-election advocacy, we are working with other members of M5 – the associations covering aerospace, automotive, food & drink and pharmaceuticals – to prepare a cross sectoral manifesto and continue our collective representations to Parliament in Government. In this regard, we work with MPs – Greg Clark (Chair of the House of Commons Science, Innovation and Technology Select Committee) and Darren Jones (Chair of the House of Commons Business and Trade Select Committee).

Another issue that regained much media and public attention was Brexit—last month marked seven years since the UK voted to leave the European Union. One opinion poll reported that 18% of Leave voters in 2016 feel Brexit has gone well, while 72% want to stop talking about it!

Looking ahead, Conservative MPs have already begun discussing who will replace Rishi Sunak if the party loses the next election. We will continue to monitor any political developments, but in the next few months we expect to see the Prime Minister trying to convince Conservative MPs that 'not all is lost'.

MEDIA COVERAGE

CIA continues to be referenced in the media. Work addressing the GB version of EU REACH continues to move at glacial speed. In an article titled 'UK failure to create post-Brexit chemical regulations risks 'irreparable damage'', the Financial Times referenced CIA's concerns that whilst the deadline extensions over registration were helpful, they reflected the 'very limited progress' in negotiations over GB REACH. The current UK approach is at odds with recent pledges by Chancellor Jeremy Hunt, to boost advanced manufacturing through 'smart' regulation, designed to foster innovation. Steve said: *"Unfortunately, such an outcome appears currently beyond us with regard to REACH and, whilst the clock ticks, companies are having to make choices over future investment amounts and locations,"*.

The FT reported that CIA remains committed to working with the government and NGOs to secure a workable deal, but added: *"We need tangible progress…and we need it fast."* In speaking with the Chancellor and the Secretary of State for Business and Trade in Coventry the week before, Steve highlighted the painfully slow progress over this issue. CIA had made its overall industry position clear immediately after the Brexit referendum in 2016 and, seven years on, there was a need to deliver a workable solution by autumn '23, to enable Parliamentary approval of a new approach and sufficient time for industry – manufacturers and importers – to prepare themselves for new registrations.

The CIA keeps pushing for a stronger decarbonisation policy and funding to keep up with systems being rolled out elsewhere in the world. CIA featured in an article by ICIS which focused on Steve Elliott's speech during the chemical industry awards urging on the need for a *"more pragmatic UK REACH and a net zero policy and funding landscape that enables the UK to compete with the America's Inflation Reduction Act and the European Union's Net Zero Industry Act"*. At present, the funding and policy frameworks rolled out by the UK government to drive the development of decarbonisation infrastructure in the country is falling behind systems such as the EU's Net Zero Industry Act and the US' Inflation Reduction Act. This is despite longer-term targets to return manufacturing to 15% of UK GDP, after falling to 10% since the start of the 2000s.

Finally, CIA attended ChemUK this year, which saw over 400 specialist exhibitors and over 150 expert speakers across two days. We had a few CIA speakers on both Wednesday 10 and Thursday 11 May. Nishma Patel, Policy Director, took part in a panel discussion hosted by BASF to discuss UK REACH issues affecting the chemical and downstream-user sectors. Ian Cranshaw, Head of International Trade and Regional Affairs, presented on Challenges (post-Brexit, post-Covid) facing UK chemical companies. Mike Lancaster, Head of Innovation and Events, introduced by Laboratory News Editor Brian Attwood, discussed the impact that digitalisation and automation will have on the industrial laboratory. This presentation explored an article written by Mike Lancaster 'The industrial lab: at line or end of line?', please see page 14.

big ask

The industrial lab: at line or end of line?

Some lab functions, mainly in-process testing, will be embedded into the process and in many cases, the chemicals will not need to come into contact with humans until the end of the process

Sustainability, market pressures and tech innovation are impacting the chemicals industry sectors. Sweating the assets' and maintaining compliance has consequences for the laboratory Laboratory News Chemical Industries Association Head of Innovation and Events Mike Lancaster

big ask

COMMUNICATIONS

In the next few months CIA will be redesigning its current website. Although there are no major issues with the website, it has not been upgraded for a few years. A new, well-designed and functioning website is essential for our credibility, trust and purpose. We hope that by implementing this upgrade we can effectively raise awareness on various issues, promote our industry, represent our members and provide up-to-date and concise information about our sector.

- Chemical investment in the UK stallings

- Sustainability Reporting Disclosures
- CIA's Sustainability Journey

Education and employment

FOR FURTHER INFORMATION CONTACT:

Simon Marsh
07951 389197
MarshS@cia.org.uk

EDUCATION AND EMPLOYMENT

At a recent meeting of Council, Mark Robinson President of Global Operations at Croda International Plc was appointed to chair our Education and Employment Strategy Group. Apart from implementing new competition law guidance, the strategy group will be focusing on small number of detailed issues including supporting ChemTalent; equality, diversity and inclusion; employee relations and working trends.

Will those leaving school still want to go to university?

MPs in Westminster have been looking at the amount of student debt in England. House of Commons research suggests that currently £20 billion a year is loaned to around 1.5 million students in England each year. The value of outstanding loans at the end of March 2023 reached £206 billion. The Government forecasts the value of outstanding loans to be around £460 billion (2021 22 prices) by the mid-2040s. The forecast average debt among the cohort of borrowers who started their course in 2022/23 is £45,600 when they complete their course. Forecast debt is expected to be lower for those starting in the reformed system from 2023/24 at £42,900. The Government expects that around 27% of full-time undergraduates starting in 2022/23 will repay them in full. They forecast that after the 2022 reforms this would increase to 61% among new students from 2023/24.

Information from the Education Data Initiative shows that 66% of developed countries' colleges offer free tuition or annual tuition less than equivalent to $2,000. Ten nations generally do not charge international students more than domestic students – these nations include; Chile, Belgium, France, Israel, Italy, Japan, Korea, Greece, Norway, and Spain.

On top of the costs are the job prospects. With a challenging UK economy it might be that numbers start to fall although at the moment trends remain strong. There were 767,000 applications for full-time undergraduate places through UCAS in 2022, a new record level. Around 560,000 of these applicants were accepted. Applications from home students were up by 2.1% in 2020 and 5.1% in 2021, driven by an increased number of 18-year olds in the population and higher application rates in this age group. Brexit meant new EU students would face higher fees from 2021 and would not be eligible for fee loans. Applications from EU students fell by 40% in 2021. The number of EU students starting full-time undergraduate courses fell by 65% between 2020 and 2022 to its lowest level since 1994. The total the number of accepted applicants through UCAS in 2020 was up by 5.4% to a new record high. Numbers fell back in 2021 by 8,400 or 1.5%. This was driven by a fall of 16,300 or 50% in accepted applicants from the EU. Acceptances from home applicants were up by 1.4% and those from other overseas applicants increased by 2.4%. Acceptances increased by 0.2% in 2022. There was a continued drop in EU students and older home students, but increases in 18 year olds from the UK and entrants from outside the EU. The higher education entry rate among UK 18 year olds increased from 24.7% in 2006 to 30.7% in 2015 and peaked at 38.2% in 2021. It fell back to 37.5%, its second highest ever level, in 2022. We'll see what 2023 brings.

Children challenging industry

Bookings are now open for the Centre for Industry Education Collaboration Children Challenging Industry (CCI) programme in the following regions for 2023-24.

- East of England (Cambs/Herts and surrounding area)
- Humber
- North East (Tees Valley and surrounding area) All places are now full but you can join our waiting list by completing the Google Form and a member of the CCI team will contact you should a place become available.

Please take a look and share with your local primary schools. The classroom sessions will involve the CCI advisory teacher working either in-person or remotely in specific circumstances, with a class of Year 5 or Year 6 children for a total of two half days. The CCI advisory teacher will provide each school with the equipment required for children to work practically, and associated risk assessments. The class teacher is expected to engage fully with the programme throughout each session and develop their own practice with support provided by the CCI advisory teacher. These sessions are particularly valuable to those teachers looking to build on their skills in teaching primary science and to newly and recently qualified teachers. If your school has previously participated in the CCI programme please consider a different class teacher to ensure the benefits of the classroom CPD.

All CCI sessions address many of the National Curriculum statutory requirements for primary science, including working scientifically. Teachers have been delighted with the way in which classroom sessions help to reinforce and revise concepts for end of key stage 2 teacher assessments in science.

There is a '60-minute twilight session', suitable for all staff from EYFS to Year 6, is intended to encourage a whole-school approach to developing children's science capital. There is an option to sign-up for ongoing e-support for all staff carrying out their subsequent action plan over 2-3 terms, and a completion certificate. Schools that completed this CPD last year, will progress to the advanced sessions to explore further opportunities which unlock children's engagement in science.

As stated in Ofsted's education inspection framework, inspectors will make a judgement on the quality of education by evaluating the extent to which:

'leaders take on or construct a curriculum that is ambitious and designed to give all learners, particularly the most disadvantaged and those with special educational needs and/or disabilities (SEND) or high needs, the knowledge and cultural capital they need to succeed in life.' Alternative CPD options are available for schools who have already completed this.

Of great value to chemical businesses who work with CCI is that part of the role of the CCI advisory teacher is to work closely with local industrialists, promoting school/industry links. During the academic year 2023-24, we will offer onsite visits wherever possible, however, online content in the form of 'live interactions' and video demonstrations will be provided from local scientists and engineers where circumstances dictate. This will continue to reinforce the work that has been covered in the classroom sessions. CIEC will confirm with booked schools at least one month before their participation in the programme.

Where on-site visits are possible this will be arranged for you by the CCI advisory teacher. Schools will need to book and pay for travel to and from their allocated site and all appropriate information will be forwarded to each participating school by the CCI advisory teacher where relevant.

Each school will be able to access a full publication containing lesson plans and teacher resources linked to the class-based training sessions.

CENTRE *for* INDUSTRY EDUCATION COLLABORATION

ACAS consultation on flexible working

acas is updating its statutory Code of Practice on handling requests for flexible working in a reasonable manner. They are doing this to reflect the anticipated reforms to legislation, significant shift in flexible working in the workplace and changing views since their existing Code was published in 2014.

Acas are consulting to ensure the new Code is as relevant, clear and explanatory as possible and would welcome contributions from all interested individuals and organisations. This will help employers, representatives and employees understand the law and what good practice on handling requests for flexible working in a reasonable manner looks like. As CIA we will develop a response but you may as a business also want to respond. The consultation will close on 6 September 2023. You can respond to the online form here: www.acas.org.uk/flexible-working-code-consultation.

Strikes in the UK

A recent piece by YouGov captured the views towards industrial action across the country. For over a year now we have seen numerous strikes across the public and private sectors including in our own industry.

'YouGov has been tracking attitudes towards the strikes for months, and looking at public opinion over that time shows a remarkable consistency. If it had been the government's hope that holding out against agreeing to the unions' demands would see the public eventually turn against strikers, they have been sorely mistaken. However, union leaders will likewise be unhappy that putting their members' case to the public hasn't seen the public swing behind them either. With inflation remaining stubbornly high, workers aren't getting any less underpaid – and it is hard to see how the public would come to see workers like doctors, teachers and nurses as not providing a serious social good. The same study also showed, causing disruption is not necessarily a big reputational risk for many professions, with perceived disruption of strikes not correlating with support for striking workers.

Nurses hold the strongest backing from the public when it comes to strikes, with 61% supporting nurses' strikes, compared to 31% opposed. Ambulance workers are similarly well-backed by the public: 58% support strike action by ambulance staff compared to 33% opposed. Both of these professions have seen the largest fluctuations in support since late January – when we began using a consistent question wording to track support for strikes* – with support down 7pts from their respective peaks of 68% and 65%. While these shifts aren't insignificant, nor are they particularly big.'

In CIA member companies we have seen less industrial action than in 2022 but it is still happening. We hope the long awaited fall in inflation will reduce the appetite for industrial action and see a universal return to chemical businesses and trade unions working together to secure growth.

CIA HR Meetings

In addition to our strategy Group, we continue to host one-hour fortnightly HR calls for colleagues from member companies and we arrange local regional meetings on HR. Our Local Employment Networks currently operate in the North West, Scotland and Yorkshire. We are expanding this to the North East in September. These networks are an opportunity to discuss HR issues in detail and exchange experiences, sometimes with a guest speaker. The fortnightly HR calls will focus on current issues and anything anyone wants to share. All member gathering take place in the framework of our current competition law guidelines.

International trade

FOR FURTHER INFORMATION CONTACT:

Ian Cranshaw
07951 387048
Cranshawl@cia.org.uk

The UK and Texas

CIA was pleased to be part of reception to welcome a team from the office of Texas Governor Greg Abbott during a visit to London. The delegation headed by First Lady of Texas

Ian Cranshaw our Head of International Trade spoke to members of the team about the importance of the links between the state of Texas and the chemical industry across the UK, a point echoed by the British Consul General in Houston Richard Hyde. Business and Trade Minister Nigel Huddleston announced that the UK and the State of Texas had agreed to accelerate discussion on a statement of mutual cooperation addressing market access barriers for business, promoting job creation and boosting innovation.

Ian is pictured welcoming the Head of the Delegation First Lady Cecilia Abbott.

UK signs up to major trading bloc

The business secretary, Kemi Badenoch has now signed off UK membership to a large Indo-Pacific trade bloc that the government argues will bring British businesses a step closer to selling to a market of 500 million people with fewer barriers. Badenoch signed the accession protocol for the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) in New Zealand during the past few days. Although felt to have limited impact, with the government's technical estimates suggesting it will add just £1.8bn annually to the economy after 10 years, the equivalent of 0.08% of Britain's gross domestic product, it could be that it paves the way for future opportunities globally.

Economic summary

FOR FURTHER INFORMATION CONTACT:

Michela Borra
07908 897013
BorraM@cia.org.uk

An Economic Update

Since April's issue of *CIAMatters*, there have been some significant developments on the economic front as the Bank of England (BoE) published its May forecast for the economy and raised interest rates for the 12th and 13th time in a row. The Office for National Statistics (ONS) issued quarterly data overlooking the state of the economy in Q1 and monthly reports on production, inflation, and labour market. Further insights on the impact of the first quarter of 2023 on chemical industries is provided by the results of the CIA's Quarterly Business Survey.

With soaring inflation from the second quarter of 2022, the role of the Bank of England has become crucial. By altering interest rates, Central Banks can impact inflation by slowing down or incentivising economic activity. Higher interest rates increase the cost of borrowing money, pushing consumers to save more and lower their demand for goods and services. Lower demand drives companies to cut production and reduce prices, thus reducing inflation rates.

During COVID-19's lockdowns, middle- to high-income earners increased their savings. With the reopening of the economy, demand for services increased as numerous months spent inside increased consumer's desire for experiences such as theatres, events and restaurants. Higher demand for services translated into higher demand for goods too leading to an initial wave of inflation in 2021. With the Russian-Ukrainian conflict and consequential energy price crisis, the cost of production and business operating costs increased, pushing prices up for both goods and services. The increased cost of living pushed pay up, which in turn increased the cost of goods and services leading to inflation's vicious cycle.

Tight monetary policy diminishes demand -and therefore price- of non-essential goods and services, for example recreation and tourism. Nevertheless, the increased amount of savings consequential to the lockdowns, higher wages, and high demand for services resulted in people dipping into their savings to continue spending. For this reason, core inflation is not decreasing as quickly as initial forecasts suggested.

On the 11th of May 2023 the BoE published its forecast within the Monetary Policy Report. The updated forecasts are more positive in terms of GDP, but account for stickier inflation.

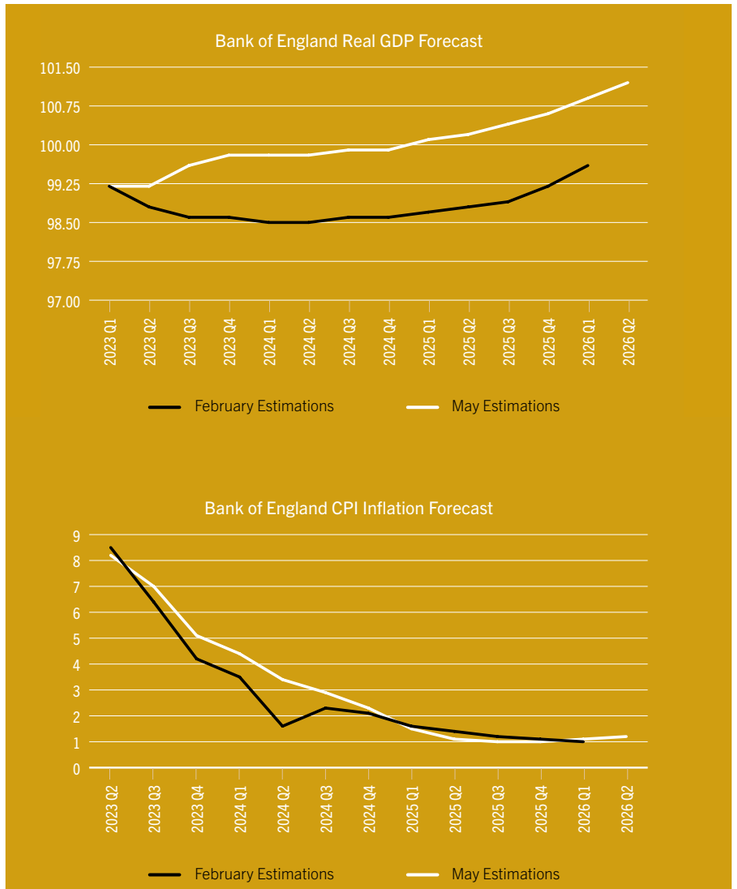
Graph 1 (see overleaf) – Bank of England Real GDP Forecast (on the top) and Bank of England CPI Inflation Forecast (on the bottom)

The graph on the top shows February's and May's forecasts for Real GDP. In February, blue line, the BoE expected the UK to enter a recession in the first quarter of 2023 as output would have contracted for two quarters. They also did not expect GDP to reach 2019's levels within their forecasting timeframe. May's estimates, orange line, are more optimistic. As of today, the UK has not entered a recession and forecasts suggest that this will remain the case. The BoE expects the UK to reach and surpass 2019's output levels by the beginning of 2025.

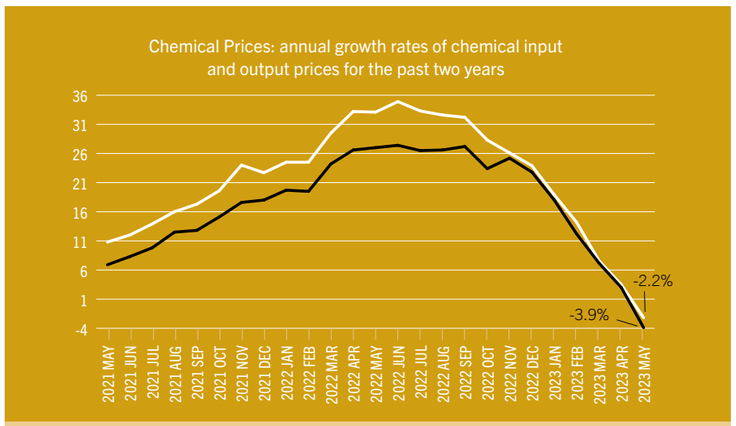
Forecasts over inflation are represented in the graph on the bottom. Contrary to Real GDP estimates, consumer side inflation projections were more optimistic in February than in May 2023. In February 2023, blue line, the BoE forecasted inflation to be 4.2% by the end of the year, 2.1% at the end of 2024, and to fall below the 2.0% target level in the first quarter of 2025. According to May 2023's estimations, orange line, inflation will be 5.1% by the end of the year and 2.3% at the end of 2024. The 2.0% target level is still expected to be met within the first quarter of 2025.

To aid inflation following the forecasted downward trend, on the 11th of May the BoE raised interest rates to 4.5%. Whilst numerous economists, in concordance with April's inflation figures, were hopeful that it was going to be the final rise, on the 22 June the BoE increased them to 5.0%. This further increase coupled with consumers' savings running out due to inflation, and uncertainty over winter's energy supply, signal a tough winter for businesses and households as economic activity will slow down and costs will remain high.

The ONS inflation data puts the current monetary policy and lingering inflation into context. In the first quarter of 2023, Consumer Price Index (CPI) inflation averaged 10.2%, significantly above the BoE projection of 9.7% and 2.0% target. This rate was the result of prices rising by 10.1% in January, 10.4% in February, and 10.1% in



Graph 1 – Bank of England Real GDP Forecast (on the top) and Bank of England CPI Inflation Forecast (on the bottom)



Graph 2 – Chemical Prices: annual growth rates of chemical input and output prices for the past two years

March. The second quarter was off to a better start as inflation rose by 8.7% in both April and May. Retail Price Index (RPI) inflation, which accounts for the change in price of retail goods and services, was 13.6% over the first quarter. In April RPI rose by 11.4% and in May by 11.3%.

Moving on to the levels of inflation experienced by producers, Input Producer Price Index (PPI) inflation in the first quarter of 2023 was 11.4% and Output PPI was 11.2%. In April they rose by 4.2% and 5.2% respectively and by 0.5% and 2.9% in May. March 2023 was the first month since September 2020, where output prices grew quicker than input prices.

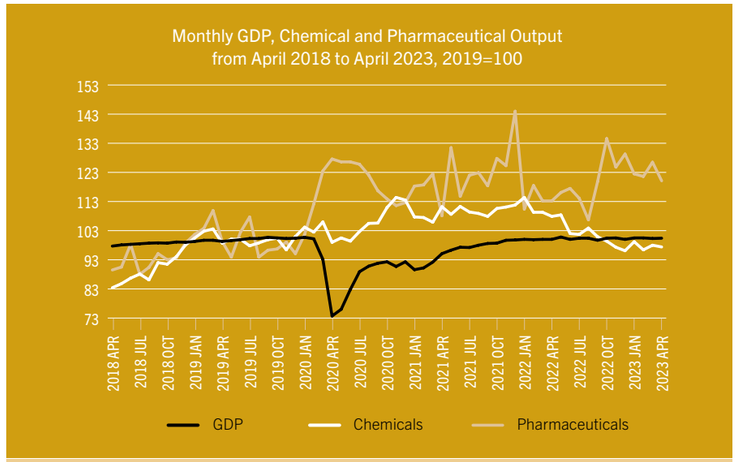
Graph 2 – Chemical Prices: annual growth rates of chemical input and output prices for the past two years.

For what concerns the chemical industry, in the first quarter of 2023, chemical input prices rose by 13.5% and chemical output prices by 12.5%. In the above graph, the orange line shows the annual growth rate of chemical input prices, while the blue shows chemical output prices. The orange line being above the blue one indicates that chemical input prices have been growing quicker than output prices for over two years. This repeated trend led to input prices being 7.8% higher than output prices as of May 2023. In April, input prices grew by 3.5%, whilst output prices by 3.0%. Both chemical input and output prices deflated in May 2023 as they were lower than in May 2022. Nevertheless, output prices fell quicker than input prices resulting in the 27th consecutive month where input prices' growth rate is above output prices' rate.

During the second week of each month, the ONS publishes data on GDP and output levels. The relevant data for the past five years is represented in the graph below. The blue line is GDP which contracted in 2020 and bounced back to pre-pandemic levels in January 2022. In the first quarter of 2023, total output increased by 0.1% and by 0.2% in April 2023. The quarterly as mentioned above and monthly increases are mainly linked to services and construction sectors.

Graph 3 – Monthly GDP, Chemical and Pharmaceutical Output from April 2018 to April 2023, 2019=100.

Focusing on Chemical output, the orange line, in the first quarter of 2023, chemical production increased by 0.3%, but it was 11.8% below the levels reached in the first quarter of 2022 and 1.4% below pre-pandemic levels. In April, chemical production contracted by a further 0.6% from March's figure bringing chemical output



Graph 3 – Monthly GDP, Chemical and Pharmaceutical Output from April 2018 to April 2023, 2019=100

levels 1.9% below pre-pandemic. Regarding chemical output, the decline is mainly linked to a decrease in demand, leading to destocking.

The grey line shows pharmaceutical output and is more volatile. In the first quarter of 2023, it decreased by 4.7% from the previous quarter, but due to the increased demand from the pandemic, it remains 27.3% above pre-pandemic levels. In March, monthly output expanded by 4.0% but contracted by 5.1% in April. Nonetheless, as of April 2023, pharmaceutical output is 23.8% above pre-pandemic.

To conclude with the quantitative data, since the last *CIAMatters*, the ONS published three labour market reports. The reports suggest that despite signs of easing, the labour market remains tight; this tightness can be attributed to Brexit, soaring inflation, and economic uncertainty. Since the last quarter of 2022, vacancies decreased by 100,000; the manufacturing sector accounted for 4,000 of them. Employment across the economy reached 30.0 million in May, an increase of 1 million from pre-pandemic levels. On the other hand, since the last quarter of 2022, redundancy rates in the manufacturing sector increased from 3.6 to 4.5, but they are expected to decrease as more data covering the second quarter of 2023 will be released.

Redundancy programmes within the manufacturing sector resulted from higher demand pay and lower production. In April, total pay rose 6.5% on average in the UK and 4.5% in the chemical industry. Due to the inflation levels, this resulted in real terms pay cuts of 2.0% and 4.0%, respectively. Nevertheless, as of 2023, the chemical and pharmaceutical sector offers the highest pay among all manufacturing sub-sectors.

The results from the latest CIA Quarterly Business Survey support the trends highlighted by the ONS. In the first quarter of 2023, a third of respondents experienced a fall in sales, exports, and production levels from the previous quarter. This data was particularly worrying when considering the severity of Q4 2022 for chemical businesses. Employee numbers, R&D spending and Business Investment remained relatively stable throughout the quarter.

Unlike in previous quarters, cost pressures and supply chains started to ease. Energy costs are stabilising but remain the largest challenge for chemical manufacturers as they are three times higher than pre-pandemic, and 21.0% of respondents expect them to worsen in the second half of the year. Labour costs are the second biggest challenge but are expected to worsen by 80% of respondents. Raw material costs, labour shortages and raw material shortages ranked third, fourth, and fifth biggest challenges facing the industry.

CIA Quarterly Economic Reports

At the CIA, we undertake a quarterly business survey of our membership. The data collected, and official data provided by the Office for National Statistics, are then presented back to members for further analysis. A comprehensive economic report is then published, looking in detail at the topics discussed by members, in addition to the economic performance of the prior quarter and forecasts for the future. Read past reports here.

Events calendar

CIA events
events@cia.org.uk
020 7834 3399

See www.cia.org.uk/Training-and-events/Training-courses for full list of events

REACHReady events
events@reachready.co.uk
020 7901 1443

CIA Events

Bioeconomy Cluster Builder: Net Zero Chemical Manufacturing – Unlocking the power of biotechnology to transform the UK chemicals industry – Free Webinar BOOK
14 September
Join us on Thursday 14 September to learn how biotechnology is transforming global chemical manufacturing and to discover how the Bioeconomy Cluster Builder can help you connect with the right people and resources to support your ambitions in this area.

UK – Emissions Trading Scheme (UK ETS) – Free Webinar BOOK
Reschedule from 11 July to new date of 21 September, 11:30 am
This webinar will provide an overview of the UK Emission Trading Scheme (UK ETS): how a site qualifies, what the obligations are if you do qualify, how to meet compliance, the potential financial impacts of participation, and what the UK Government has said in relation to the future of the scheme.

CIA Annual Dinner BOOK
16 November, London
The legendary CIA Annual Dinner at the Grosvenor House on Park Lane come and join 800 industry leaders at this showcase event on 16 November.

REACHReady Events

REACH – The Basics BOOK
13 & 14 September (mornings only)
Ideal for anyone who needs to understand more about their obligations under the UK and EU REACH Regulations, and also of interest to suppliers of substances and mixtures who are looking to support their EU and UK customers on REACH.

REACH Inquiry – half day clinic BOOK
27 September (morning only)
Under EU REACH, businesses need to first submit an inquiry to ECHA in order to begin data-sharing negotiations for registration purposes. Similarly, under UK REACH new market entrants and existing importers will have to do likewise. The who, why and what's involved in submitting an Article 26 Inquiry.

Managing Safety Data Sheets BOOK
18 & 19 October (mornings only)
Everyone supplying mixtures in the UK and EU 27 – from importers to formulators – needs to understand the Safety Data Sheet and how REACH affects it (EU/UK). This workshop is for those who are responsible for preparing SDS for substances or mixtures they formulate and supply in to European & UK downstream users.

IUCLID 6 – 1-day practical training for REACH registrants BOOK
9 November (in-person; London)
IUCLID – the International Uniform Chemical Information Database – is the official tool for REACH data collection. REACHReady's comprehensive and interactive user training course will teach you how to use it.

Managing REACH for suppliers of articles: How compliant are you? BOOK
12 & 13 December (mornings only)
Aimed at business managers and regulatory specialists in companies that supply articles within the UK and EU. Of particular relevance to companies working through the requirements in the REACH Regulation for finished goods, sub-assemblies and components. Also of interest to importers and producers of articles alike, who are dealing with supply chain communication obligations and verifying product compliance.

Make our team part of your team!

CIA TEAM MEMBERS


Michela Borra
Economy
BorraM@cia.org.uk


Aila Bursnall
Responsible Care
BursnallA@cia.org.uk


Ian Cranshaw
Head of International Trade and Regional Affairs
Cranshawl@cia.org.uk


Kirsty Eley
Chemicals Policy
EleyK@cia.org.uk


Steve Elliott
Chief Executive
ElliottS@cia.org.uk


Helen Ip
Events and Regions
IpH@cia.org.uk


Mike Lancaster
Events and Innovation
LancasterM@cia.org.uk


Simon Marsh
Employment and Communications
MarshS@cia.org.uk


Dawn McCaughey
Chief Executive's Office and REACHReady
McCaugheyD@cia.org.uk


Charis McInnes
Environment and Sustainability
McInnesc@cia.org.u


David Mitchell
Energy and Climate Change
MitchellD@cia.org.uk


Phil Mutero
Finance
MuteroP@cia.org.uk


Rachel Nabudde
REACHReady
NabuddeR@cia.org.uk


Nishma Patel
CIA Policy
PatelN@cia.org.uk


Dallas Paternott
Responsible Care
PaternottD@cia.org.uk


Davy Pollard
Responsible Care
PollardD@cia.org.uk


Roger Pullin
Chemicals and Health Policy
PullinR@cia.org.uk


Phil Scott
Safety and Security
ScottP@cia.org.uk


Anila Sadiku
Finance
SadikuA@cia.org.uk


Silvia Segna
REACH and Biocides Policy
SegnaS@cia.org.uk


Mike Squire
Environment
SquireM@cia.org.uk


Diana Tamayo
Communications and ChemTalent
TamayoD@cia.org.uk


Terry Woolmer
Responsible Care
WollmerT@cia.org.uk


Rich Woolley
Energy and Climate Change and CIABATA
WoolleyR@cia.org.uk

Annual Dinner

16 November 2023

Grosvenor House Hotel, Park Lane, London W1

The CIA's legendary flagship dinner is one of the most prestigious in the business calendar and is an occasion for celebration, networking and great entertainment. The evening provides an excellent opportunity to entertain – in person – your valued clients, network with potential customers and generate new business contacts.

Senior representatives of chemical companies and influential figures from industry, government, stakeholders, the city and the news media will all be in attendance.

The Dinner will take place on 16 November 2023 at the Grosvenor House Hotel in London's Park Lane. Tickets are reserved on a first-come-first served basis and you are encouraged to book early to avoid disappointment.

Don't miss out on the industry event of the year.
Tickets on sale mid-July.

For more information and booking, please visit:
www.ciaannualdinner.co.uk

CIA
CHEMICAL INDUSTRIES ASSOCIATION

For further details please contact: John Bastock, CIA Events, c/o Mint Events Ltd, Riverside, Mountbatten Way, Congleton, Cheshire, CW12 1DY **Tel:** +44 (0)1260 765865 **Email:** dinner@cia.org.uk