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A sector group of Cefic



2025
2●26

Chlor-Alkali industry review

This Industry Review (September 2025 – August 2026) reflects our Mid-Century Strategy's four pillars – Safety Leader, Competitive Supplier, Climate Neutral Player and Circularity Champion – and covers 94.9% of members' capacity for 2025. Seven KPIs, marked with this icon (), have been tracked since 2001 to enable comparison across editions. Minor variances from previous reports may appear due to late submissions or corrections, but these do not affect overall trends. The figures presented here represent the most accurate industry data to-date but are provided for information purposes only.

This report and the topics covered under the different sections are also available online via the QR codes or the clickable icons.

Photo courtesy of Nobian.



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A Message from **our Chair**

Staying the course...

The past year has tested the resilience of Europe's Chlor-Alkali industry, and the challenges are far from over. Persistently high electricity costs, low utilisation rates and an increasingly complex regulatory landscape continue to place significant pressure on our sector. Yet even under these conditions, Safety remains, and will always remain, our first and unwavering priority. It is the foundation of everything Euro Chlor does.

Competitiveness though has become a central focus of our work. Following a thorough review of our strategy by the Management Committee last October, Euro Chlor has sharpened its efforts to address the structural costs, particularly energy costs, that affect our industry's ability to compete. This goes hand-in-hand with ensuring that policymakers understand the realities facing our sector and the importance of maintaining a strong and competitive European chemical industry.

This report highlights these efforts, alongside our progress on Safety, Climate and Circularity.

As Chair of the Euro Chlor Management Committee, I would like to thank our members, committees and secretariat for their commitment during a demanding year. Our industry's contribution to Europe's economy and daily life remains essential, and we will continue working together to strengthen its competitiveness, sustainability and long-term future.

Markus Mingenbach

Chair of the Management Committee

The past year has tested the **resilience of Europe's Chlor-Alkali industry**, and the challenges are **far from over**.

Euro Chlor Director's Review

... with a little help from our friends

We will 'stay the course' with the strong and engaged community we have.

One word has defined the last twelve months for the team here in Brussels. Competitiveness. Attention on this topic has been a feature of the Association for many years but, given the current challenges facing our sector, the need for specific focus here has never been more acute.

The team has responded to this by 'turning the dial up to 11' (which I am personally very grateful for). Maud, Françoise and Catherine have developed new communication pieces, an upcoming campaign and new website to support the messaging. Chantal is keeping our partners in the loop. We have active outreach on our challenges under the ETS led by Eili. We have new AI tools and data sets from Thomas to ensure our messages are firmly based on data (with more on the horizon). All of this would be impossible without the exceptional support of the committees which Markus refers to in his message; something the entire team is thankful for!

We will 'stay the course' with the strong and engaged community we have. Harnessing this gives us a real shot at restoring the Competitiveness of our sector and the essential products it provides.

Richy Mariner
Euro Chlor Director

Our **Vision, Mission** and **Values**

Our Mid-Century Strategy at a glance

Launched in September 2020, Euro Chlor's [Mid-Century Strategy \(MCS\)](#) tracks the European Chlor-Alkali industry's path to becoming Safe, Competitive and Climate-Neutral by 2050, in line with the EU Green Deal and the [Cefic Mid-Century Vision](#). It rests on **four pillars**:

- **Safety Leader:** Reaching zero Lost Time Injuries (LTIs) and zero process incidents through robust protocols for the safe production, transport and handling of Chlor-Alkali products.
- **Competitive Supplier:** Securing reliable and affordable energy through a strong policy voice for a modern and competitive European Chlor-Alkali sector.
- **Climate Neutral Player:** Meeting European climate targets through energy efficiency, lower Carbon footprint and 100% Chlor-Alkali Hydrogen valorisation.
- **Circularity Champion:** Working with downstream partners to close production loops, increase recycling across the value chain and move towards zero-waste operations.

Progress is monitored annually via KPIs under our [Sustainability Programme](#) and published each year in our [Chlor-Alkali Industry Reviews](#). This edition covers members' 2025 performance.

A dedicated overview of progress since the MCS launch is in preparation to accompany this year's review.



**Safety
Leader**



**Competitive
Supplier**



**Climate Neutral
Player**



**Circularity
Champion**



04

08

A YEAR IN REVIEW ●

A year of **Engagement** and **Delivery**

From priorities to action

The past twelve months have been amongst the most demanding in our industry's recent history. Yet they have also been a year in which Euro Chlor, under the governance of its Management Committee, decisively translated priorities into action to restore the cost competitiveness of our sector, above all on energy.

This section describes our engagement with the European Commission and national authorities, our contribution to the wider industrial competitiveness agenda following the [Antwerp Declaration](#), and our work on the regulatory files that matter most to members.

Competitiveness, however, has not come at the expense of our other commitments. In line with our [Mid-Century Strategy](#), this review also reports on our progress as a **Safety Leader**, **Climate Neutral Player** and **Circularity Champion**, supported by the facts and figures our members have reported for 2025.

Taken together, the following pages offer a transparent account of a challenging year – and of an Industry, and an Association, determined to secure the long-term future of Chlor-Alkali production in Europe.

Focus on our Competitiveness

Strategic priorities for a competitive Chlor-Alkali future

The challenges facing Europe's Chlor-Alkali industry (high energy costs, low utilisation and regulatory pressure) continue to intensify, driving plant closures and job losses across the continent. Collective, coordinated action at both EU and national level has therefore become essential.

It was against this backdrop that Euro Chlor convened a **Special Strategic Planning Workshop** on 31 October 2025 with the Management Committee to define the industry's key priorities and map out the road ahead. The overarching mission agreed was to **safeguard our sector's ability to produce Chlor-Alkali products – strategically vital to Europe's future sustainability – enabling the industry to operate safely, keep investing in its assets, and secure its long-term viability.**

Two clear, interrelated priorities emerged: **generating demand through emergency policy measures that protect and promote local production, reducing Europe's import dependency; and making the industry cost competitive by addressing structural costs, primarily energy.**

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Building on these priorities, Euro Chlor (supported by its Management Committee, Communications Committee (CC) and Advocacy and Regulatory Affairs Committee (ARAC)) has developed an initial set of actions, each marked with this icon (), which are detailed in the following chapters.



Focus on our **Competitiveness**

The Antwerp Call to Alden Biesen; Well aligned with Euro Chlor's priorities

At the European Industry Summit organised by Cefic in Antwerp (11 February 2026), the [Antwerp Declaration](#) Community (representing over 1,300 companies, associations and trade unions) urged EU leaders to take emergency action. These focused on industrial electricity prices, jobs, trade fairness and demand for European products.

Though Euro Chlor was only indirectly involved, the messages shared here align closely with our sector's priorities.

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The [Call](#) informed the EU Leaders' Retreat the following day in Alden Biesen, Belgium. This in turn set the stage for concrete measures to be taken forward at the March European Council meeting.

The Council acknowledged the competitiveness crisis and advanced initiatives such as the Grids Package and the Industrial Accelerator Act (IAA), with binding legislation on these expected to be developed in the coming months.



Engaging with the European Commission

Euro Chlor maintains an ongoing dialogue with the European Commission's Directorate-General for Trade and Economic Security (DG TRADE) and the Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs (DG GROW). This aims to ensure that our sector's challenges are understood at EU level.

In December 2025, senior representatives from the Chlor-Vinyl industry and Euro Chlor met with DG TRADE to discuss the challenges facing these strategically important sectors. The meeting, initiated by Vinyl suppliers within the European Council of Vinyl Manufacturers (ECVM 2010), offered a useful opportunity for open exchange with the Commission on the specific features of our sector.

Then, in March 2026, Euro Chlor hosted a meeting with DG GROW at Vynova Tessenderlo, giving the Commission a first-hand look at the realities facing our sector. The visit sparked substantial discussion on competitive pressures and the impact of Carbon and energy costs, with DG GROW showing genuine interest in the sector's position. The Commission has since expressed a desire for continued engagement and data-sharing.

Finally, with support from Cefic's trade experts, Euro Chlor also monitors import trends (notably for Caustic Soda). Using the [European Commission's Trade Diversion Monitoring Tool](#), the aim is to keep members informed of import surges.



Assessing our sector's competitiveness

The tool remains a useful early-warning system, although it is less effective at capturing gradual, cumulative trends ('slow burns') that can cause structural harm over time (but these features are in development). Members have also pointed to the need for a broader instrument able to track interconnected sectors and the knock-on effects of trade diversion across the value chain. A more 'Chlor-Alkali specific' tool is therefore being developed by the secretariat for use by the members.

The Commission has expressed a desire for **continued engagement and data-sharing**.

At the initiative of Euro Chlor's Management Committee, AI tools have been used to assess the reliability of the forecasts set out in the 2023 Argus Media Competitiveness Study, testing each prediction against actual data.

The analysis evaluates forecast accuracy across five domains – **EU industrial electricity, Carbon and EU ETS, commodities, cost competitiveness, and production and capacity** – and distils the findings into an overall scorecard and consolidated verdict, with sources and methodology documented throughout.

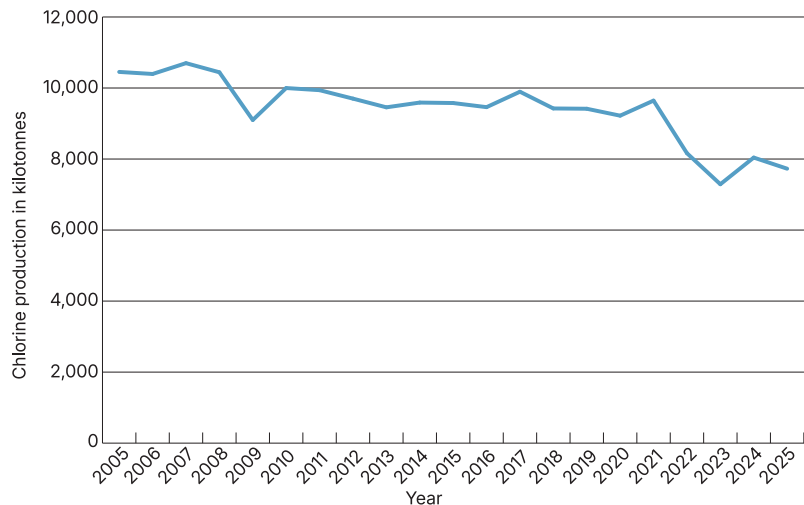
This will be used to ensure our messages remain supported by real data.

2025 Chlorine production

In 2025, Chlorine production reached **7,728 kilotonnes**, with an average capacity utilisation of **66.3%**. This represents a further decline on 2024 (8,041 kilotonnes; 68.6%).

Euro Chlor continues to draw the European Commission's attention to the significant impact of the prolonged low utilisation levels on our industry.

Aggregated monthly European Chlorine production, capacity utilisation, and Caustic Soda stock figures reported by members to Cefic are available via [our website](#).

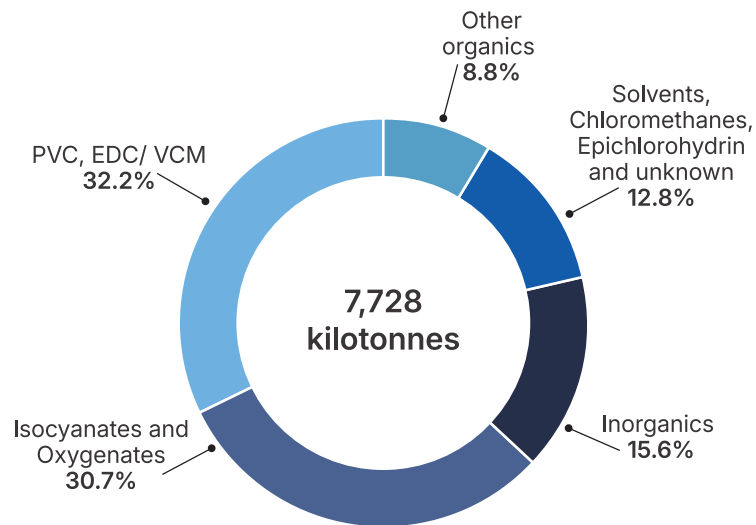


2025 Chlorine applications

PVC, EDC/ VCM and **Isocyanates/ Oxygenates** remain the main applications for Chlorine, accounting for **62.9%** of the total.

For a comprehensive overview of Chlorine products, see [our website](#).

European Chlorine applications 2025
(percentage of total of 7,728 kilotonnes)

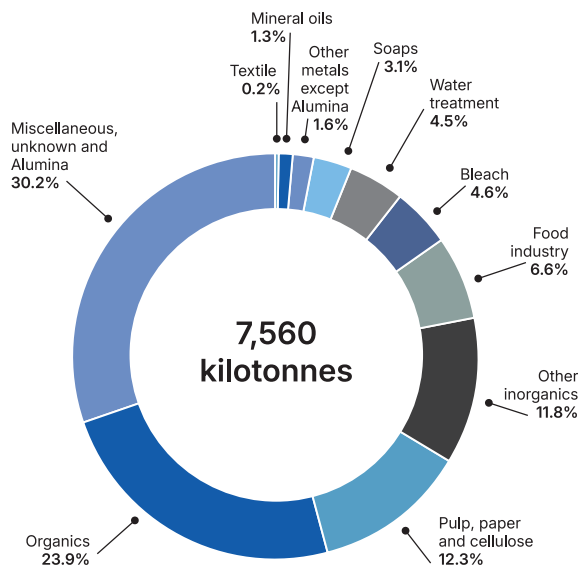




2025 Caustic Soda applications

To learn more about the diverse range of applications for Caustic Soda (Sodium Hydroxide), see [our website](#).

European Caustic Soda applications 2025
(percentage of total of 7,560 kilotonnes)

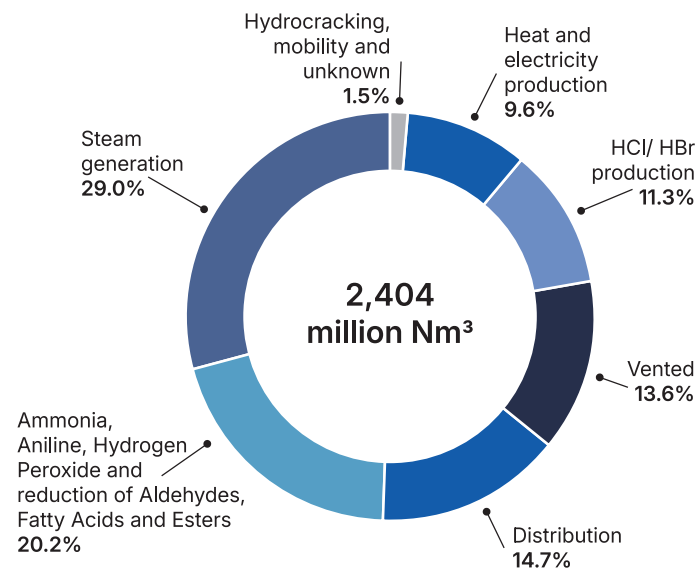


2025 Hydrogen applications

Most of the Hydrogen produced in Europe's Chlor-Alkali process is used for steam generation and chemical production. However, it also has various other applications as detailed in the chart below.

Learn more about the Hydrogen products on [our website](#).

European Hydrogen applications 2025
(percentage of total of 2,404 million Nm³)



Note: The figure for vented Hydrogen may vary from that reported elsewhere in this report as it results from a separate questionnaire with a different level of detail.



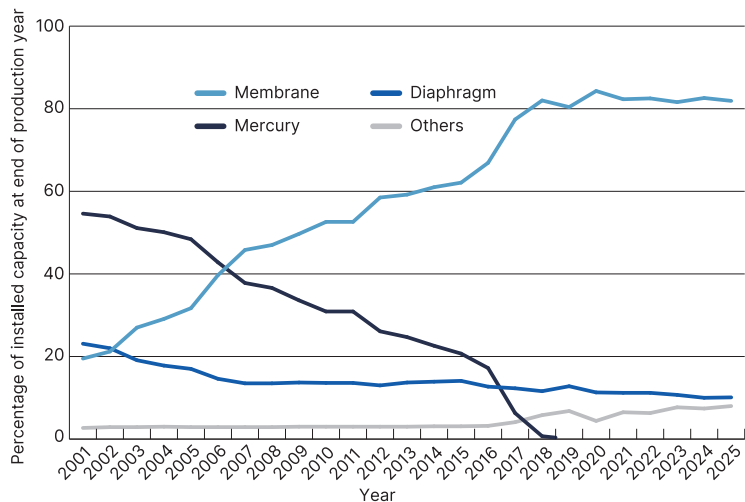
Chlorine manufacturing technologies

Membrane technology remains dominant in European Chlor-Alkali production, accounting for **81.9%** of installed EU capacity in 2025 (*versus* 82.6% in 2024).

Diaphragm technology remained stable at **10.1%** of installed EU capacity in 2025 (*versus* 10.0% in 2024).

Mercury technology was fully phased out in 2018, following the Best Available Technique (BAT) conclusions for Chlor-Alkali as part of the EU's Industrial Emissions Directive (IED).

The remaining **8.0% ('Others')** comprises Chlorine-Alcoholate production, Hydrochloric Acid conversion to Chlorine and metal production using Chlorine and Caustic production without Hydrogen as a by-product.



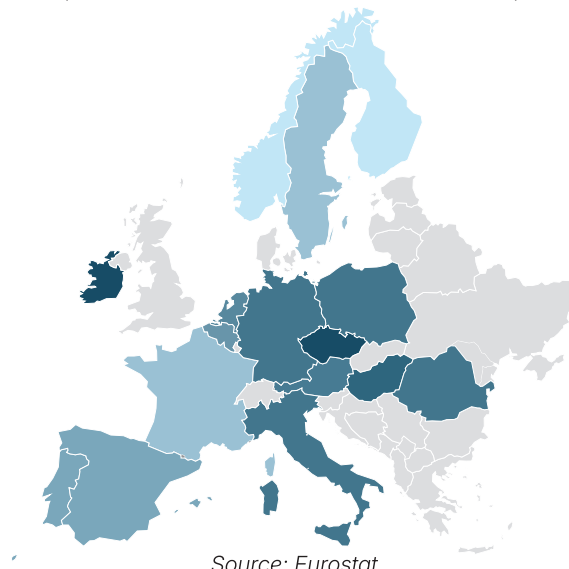
Electricity costs within the EU

Since 2020, Euro Chlor has compiled publicly available data comparing electricity costs in Europe. Data are also collected to compare these costs with those in the US, as well as the cost of CO₂ in Europe relative to other regions.

The heat map below illustrates the variation in electricity prices across EU countries where Euro Chlor members operate.

Electricity price for consumers between 70-150 GWh/year in 2025 excl. VAT and other renewable taxes and levies

€45.6/MWh €184/MWh



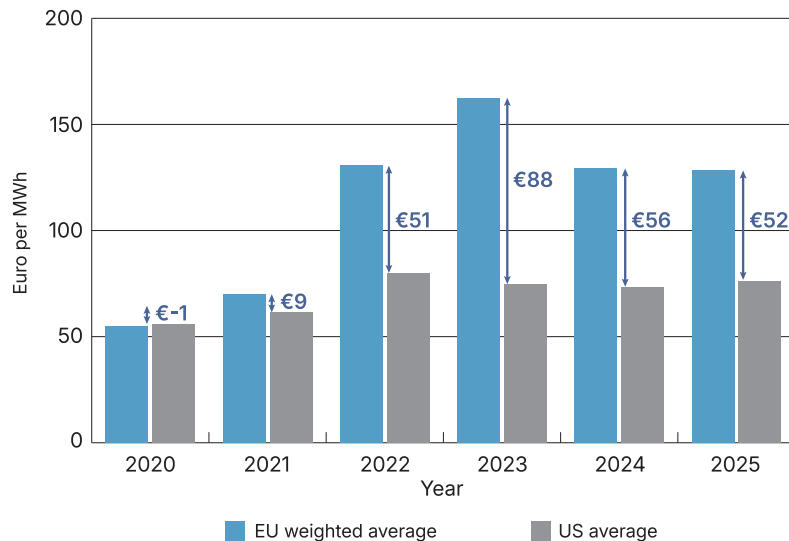
Source: Eurostat



Comparison of EU-US electricity price for industrial consumers

The graph below compares electricity prices for industrial consumers in the EU and the US, based on an EU weighted average.

In 2025, the price differential narrowed slightly to **€52 per MWh**, down from €56 per MWh in 2024. Despite this, the gap with US prices remains when compared with 2021, when it stood at €9 per MWh.



Source: Eurostat and US Energy Information Administration

CO₂ prices around the world

Source: World Bank Group

CO₂ pricing continues to weigh on electricity costs in Europe. In 2025, the EU Carbon price stood at **€65.2 per tonne**, around 23% higher than the UK, roughly three times higher than North America, and nearly six times higher than China.

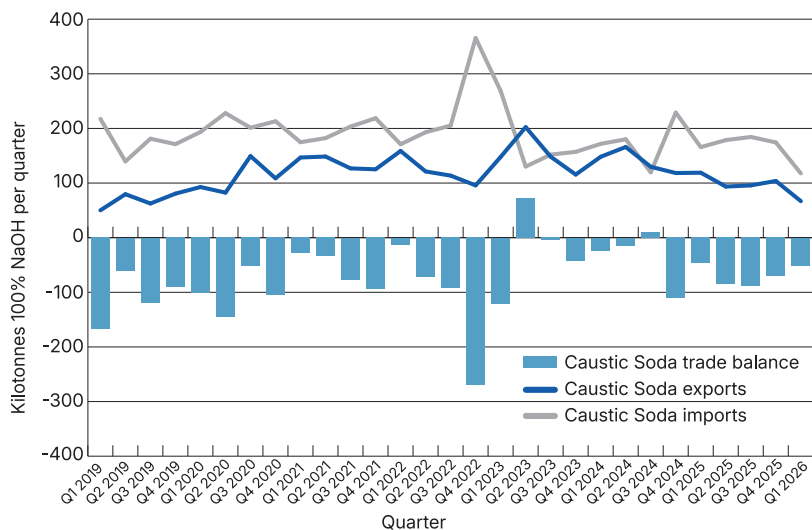
This disparity places the European Chlor-Alkali industry at a continued competitive disadvantage relative to regions with different Carbon pricing mechanisms.

Caustic Soda trade balance

Europe remained a structural net importer of Caustic Soda throughout 2019-2025, with the deficit peaking dramatically during the 2022-2023 energy crisis before partially easing. The imbalance has not closed though. Imports continue to exceed exports, which have drifted steadily lower, while production remains well off its 2019-2021 levels.

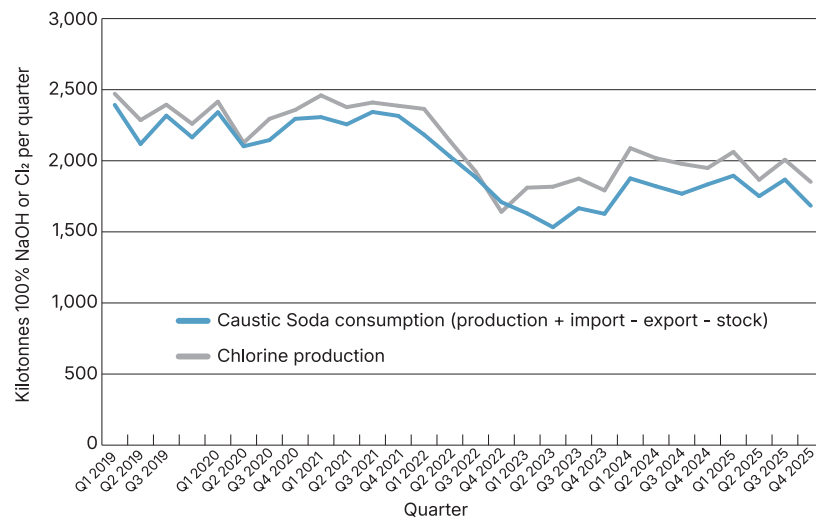
Euro Chlor continues to monitor this trend closely, given its implications for member competitiveness.

Caustic Soda trade balance (extra EU27)



Source: Eurostat

Caustic Soda consumption (EU27)



Source: Eurostat



Imports continue to **exceed exports**, which have drifted **steadily lower**, while **production** remains **well off its 2019-2021 levels**.

Chlorine production plants

	Country	Company	Site	Total (kt Cl ₂)	D	M	Others
1	Austria	Donau Chemie	Brückl	75		75	
Austria Total				75	0	75	0
3	Belgium	INEOS Inovyn	Lillo	500		500	
4	Belgium	INEOS Inovyn	Jemeppe	174		174	
5	Belgium	Vynova	Tessenderlo	400		400	
Belgium Total				1,074	0	1,074	0
7	Czech Republic	Spolek (Spolchemie)	Ústí nad Labem	78		78	
Czech Republic Total				78	0	78	0
9	Finland	Kemira	Joutseno	75		75	
Finland Total				75	0	75	0
10	France	PPC	Thann	42			42
12	France	KEM ONE	Fos	300		300	
14	France	KEM ONE	Lavera	347		347	
15	France	Arkema	Saint-Auban	19		19	
16	France	MSSA	Pomblière	42			42
18	France	INEOS Inovyn	Tavaux	370		370	
19	France	Kuhlmann France	Loos	39		39	
France Total				1,159	0	1,075	84
20	Germany	BASF	Ludwigshafen	495		315	180
21	Germany	Covestro	Dormagen	480		400	80
22	Germany	Covestro	Leverkusen	390		390	
23	Germany	Covestro	Krefeld-Ürdingen	290		290	
24	Germany	Covestro	Brunsbüttel	220			220
25	Germany	Dow	Schkopau	253		253	
26	Germany	Westlake Vinnolit	Hürth-Knapsack	250		250	
27	Germany	CABB GmbH	Gersthofen	57		55	2
28	Germany	Dow	Stade	1,560	1,023	537	
29	Germany	Neolyse Ibbenbüren GmbH	Ibbenbüren	82		82	



January 2026 capacities

	Country	Company	Site	Total (kt Cl ₂)	D	M	Others
30	Germany	Nobian	Bitterfeld	99		99	
31	Germany	Lülsdorf Functional Solutions	Lülsdorf	77			77
33	Germany	Nobian	Frankfurt	283		283	
34	Germany	INEOS Inovyn	Rheinberg	220	110	110	
35	Germany	Vestolit (Orbia)	Marl	260		260	
36	Germany	Westlake Vinnolit	Gendorf	205		205	
37	<i>Germany</i>	<i>Wacker Chemie</i>	<i>Burghausen</i>	60		60	
96	<i>Germany</i>	<i>LEUNA-Harze</i>	<i>Leuna</i>	15		15	
Germany Total				5,296	1,133	3,604	559
94	Greece	Kapachim	Inofita Viotias	10		10	
Greece Total				10	0	10	0
39	Hungary	BorsodChem	Kazincbarcika	576		384	192
Hungary Total				576	0	384	192
40	Ireland	Micro Bio	Fermoy	11		11	
Ireland Total				11	0	11	0
41	Italy	Altair Chemical	Saline di Volterra	75		75	
42	Italy	Società Chimica Bussi (Vectre)	Bussi	18		18	
44	Italy	Società Chimica Bussi (Vectre)	Assemini	29		29	
49	Italy	INEOS Inovyn	Rosignano	150		150	
50	Italy	Altair Chemical	Pieve Vergonte	42		42	
93	Italy	Fater	Campochiaro	20		20	
99	Italy	Halo Industry	Torviscosa	24		24	
Italy Total				358	0	358	0
51	The Netherlands	Nobian	Botlek	637		637	
52	The Netherlands	Nobian	Delfzijl	121		121	
54	<i>The Netherlands</i>	<i>Sabir</i>	<i>Bergen op Zoom</i>	89		89	
The Netherlands Total				847	0	847	0



Process:

D = diaphragm

M = membrane

'Others' includes HCl electrolysis, ODC, Molten Salt electrolysis, Alcoholates.

Non Euro Chlor members are indicated in *italics*.

Chlorine production plants

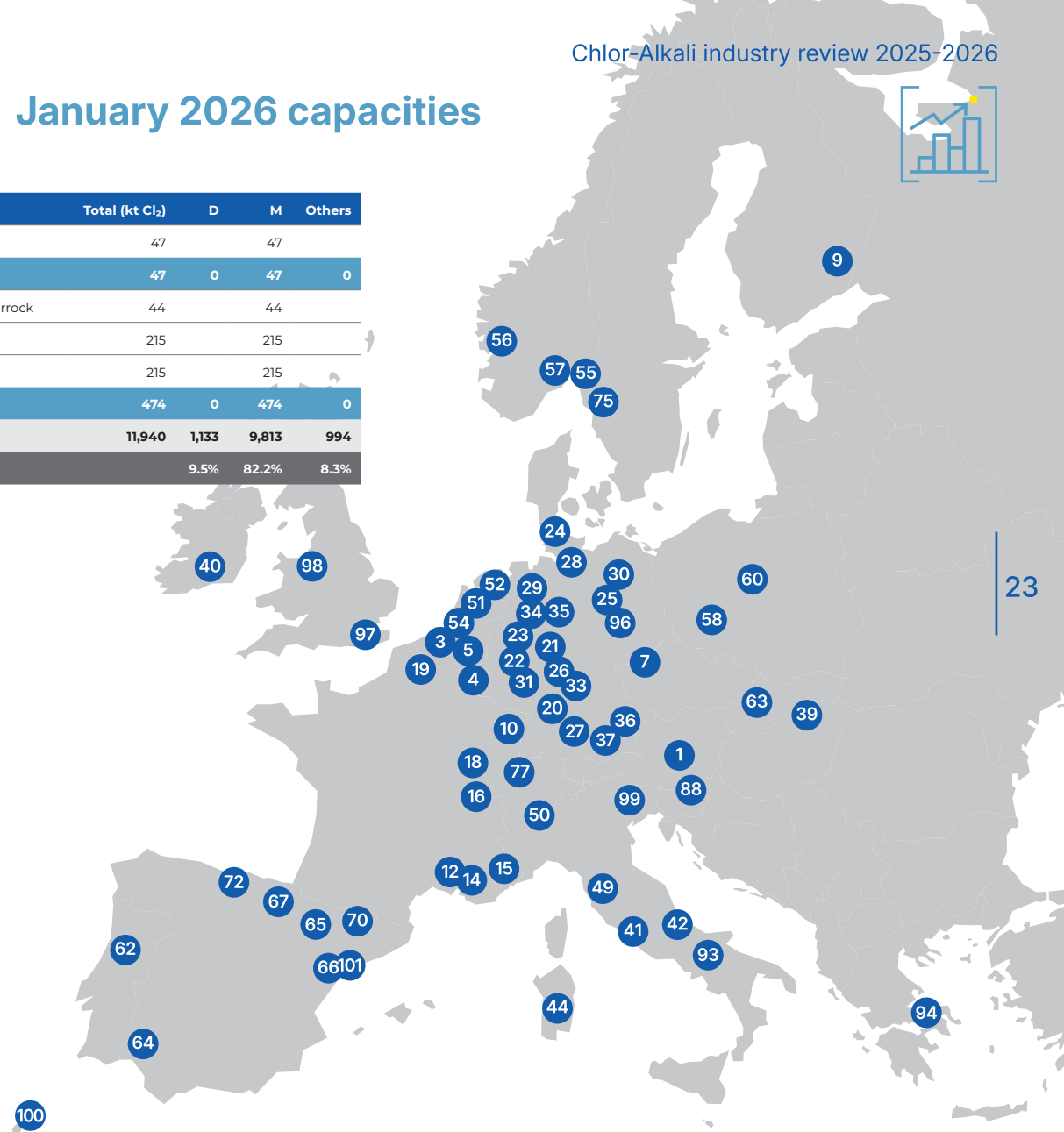
	Country	Company	Site	Total (kt Cl ₂)	D	M	Others
55	Norway	Borregaard	Sarpsborg	45		45	
56	Norway	Elkem	Bremanger	11		11	
57	Norway	INOVYN Norge	Rafnes	315		315	
Norway Total				371	0	371	0
58	Poland	PCC Rokita	Brzeg Dolny	210		210	
60	Poland	Anwil	Włocławek	195		195	
Poland Total				405	0	405	0
62	Portugal	Bondalti Chemicals	Estarreja	166		107	59
Portugal Total				166	0	107	59
91	Romania	Chimcomplex	Râmnicu Vâlcea	106		106	
92	Romania	Chimcomplex	Borzești	79		79	
Romania Total				185	0	185	0
63	Slovak Republic	Fortischem	Nováky	70		70	
Slovak Republic Total				70	0	70	0
88	Slovenia	TKI Hrastnik	Hrastnik	16		16	
Slovenia Total				16	0	16	0
64	Spain	Electroquímica Onubense	Huelva/ Palos	44		44	
65	Spain	Bondalti/ Ercros	Sabiñanigo	45		45	
66	Spain	Bondalti/ Ercros	Vila-seca	172		172	
67	Spain	Electroquímica de Hernani	Hernani	30		30	
70	Spain	Química del Cinca	Monzón	60		60	
72	Spain	Bondalti Chemicals	Torrelavega	68		68	
100	Spain	Biomca Química	Santa Cruz de Tenerife	5		5	
101	Spain	Covestro	Tarragona	100			100
Spain Total				524	0	424	100
75	Sweden	Inovyn Sverige	Stenungsund	123		123	
Sweden Total				123	0	123	0



January 2026 capacities

Country	Company	Site	Total (kt Cl ₂)	D	M	Others
77	Switzerland	CABB AG	Pratteln	47	47	
Switzerland Total			47	0	47	0
97	UK	Industrial Chemicals Ltd	West Thurrock	44	44	
98*	UK	Vynova Runcorn	Runcorn	215	215	
98*	UK	INOVYN ChlorVinyls Limited	Runcorn	215	215	
UK Total			474	0	474	0
Grand Total (kt Cl₂)			11,940	1,133	9,813	994
Per process (percentage)				9.5%	82.2%	8.3%

*Both operating on the Runcorn Site



Focus on **EU Regulations** and **Initiatives** relevant to our sector



EU Emissions Trading System (ETS) Chlorine Benchmark; What is at stake?

Carbon costs under the EU ETS remain a priority concern for Euro Chlor members. As the Commission prepared for the broader ETS revision, it was tasked with proposing benchmark values for the 2026-2030 allocation period. This includes those related to indirect Carbon costs. However, a Commission communication in December 2025 suggested that there were no plans to revise existing benchmarks, including the Chlorine one, focusing instead on newly eligible sectors.

The current Chlorine benchmark is based on **Oxygen Depolarised Cathode (ODC) technology**, which accounts for less than 1.5% of EU production and does not reflect the energy performance of **mainstream membrane technology**; the sector's most representative and efficient process when all three co-products are considered.

Over the past twelve months, Euro Chlor has continued to actively engage with the Commission, providing additional supporting material and tools to show the significant, sector-wide impact of the current benchmark, and requested an urgent correction to align with the recognised Best Available Technique (BAT) for Chlor-Alkali.

In parallel, Euro Chlor also worked with Fraunhofer ISI (who led the previous benchmark revision process for the Commission) to obtain a third-party technical assessment of what a representative Chlorine benchmark should be, based on current European production data and benchmark-setting methodologies. The potential impacts of these activities are expected in late-2026.

Regulations



Focus on **EU Regulations** and **Initiatives** relevant to our sector



State Aid instruments; Potential energy cost relief for our sector

To help offset the impact of high energy costs, several EU State Aid instruments have become available to energy-intensive sectors, including Chlor-Alkali. These instruments are not automatic as their implementation depends on individual Member States. As such, Euro Chlor encourages its members to liaise directly with their national authorities to explore eligibility and access. There are several interconnected files related to these instruments:

The **Affordable Energy Action Plan (AEAP)** (February 2025) and **Accelerate EU** (April 2026) are the Commission's overarching strategic and crisis-response frameworks, providing the political impetus for the complementary State Aid instruments below, which Member States can deploy.

Clean Industrial Deal State Aid Framework (CISAF): adopted in June 2025 and valid until end of 2030, CISAF aims to restore the investment case for European industry. It includes temporary electricity price relief for energy-intensive industries exposed to international competition (which Chlor-Alkali Hydrogen might be eligible for), capping aid at 50% of the average wholesale price and covering at most 50% of total consumption, with a minimum effective price floor of €50 per MWh. Separately, Chlor-Alkali Hydrogen may qualify under CISAF support for low-carbon fuels if it meets the applicable low-Carbon Hydrogen criteria, including the 70% greenhouse gas reduction threshold and the relevant electricity-sourcing conditions. At least half of any aid received must also be reinvested in the decarbonisation or modernisation of assets.

Middle East Crisis Temporary Framework (METSAF): adopted in April 2026 and valid only for the remainder of the year (until 31 December 2026), METSAF raises the aid intensity ceiling from 50% to 70% of eligible electricity costs, with no additional decarbonisation requirement. For energy-intensive industry electricity price relief, METSAF operates as a temporary add-on to CISAF.

These instruments can be cumulative as long as they respect the eligibility and conditionality requirements. While the Commission encourages full use of available frameworks, it cannot compel Member States to act. This means that the pace and ambition of deployment are up to national governments.

With the support of Cefic, Euro Chlor continues to engage with authorities at both European and national level for action on energy prices.



EU Electrification Action Plan; What it could mean for our sector

The **EU Electrification Action Plan** aims to accelerate the shift from fossil fuels to clean electricity, targeting 32% of final energy consumption from electricity by 2030, and reducing Europe's exposure to volatile oil and gas prices.

For energy-intensive industries like ours, the plan could offer a valuable opportunity to secure more affordable, stable electricity through fairer taxation and funding rules, as well as major investment in energy storage and grid infrastructure.

This plan could become an important tool to help our sector restore its long-term competitive position in Europe. One to watch!

Several **EU State Aid instruments** are available to energy-intensive sectors, but the **pace** and **ambition of deployment** of these tools are up to **national governments**.

Focus on **EU Regulations** and **Initiatives** relevant to our sector



The Critical Chemicals Alliance (CCA)

Launched in October 2025 as part of the European Chemicals Industry Action Plan, the CCA is a Commission-led platform bringing together industry, Member States and stakeholders to safeguard chemicals critical to Europe's economy and industrial sovereignty. It operates through four working groups, covering **critical molecules and sites, trade, modernisation and investments**, and **lead markets**. Cefic (and through it, Euro Chlor) is an active member.

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Of particular interest to our industry is that, under the CCA's current methodology, a molecule qualifies as '**critical**' by combining **high economic importance** with **supply vulnerability**, typically measured through import dependence. Euro Chlor has worked, via Cefic, to test the methodology and has provided feedback on this to ensure that the method is as robust as possible and reflects the unique production and trade conditions of Chlor-Alkali.

The Alliance is expected to conclude much of its work by October 2026 with policy developments as of early next year.

A molecule qualifies as '**critical**' by combining **high economic importance** with **supply vulnerability**, typically measured through **import dependence**.



EU Renewable Energy Directive (RED) review; Renewable Hydrogen back into sharp focus

The delegated acts on **Renewable Fuels of Non-Biological Origin (RFNBOs)**, which set out the conditions under which Hydrogen can be classified as renewable, are expected to be part of the EU RED review. In response to implementation issues, the Commission has fast-tracked this review, with a revised Delegated Act expected before year-end, potentially easing some of the most burdensome requirements.

Euro Chlor is engaging with the Commission to ensure a well-calibrated revision of the Hydrogen rules that acknowledges the specific characteristics of electrochemical industrial processes and avoids imposing compliance burdens disproportionate to the decarbonisation gains achieved. This will help the sector contribute meaningfully to Europe's clean energy objectives whilst preserving its industrial viability.



The Universal PFAS Restriction; Preparing our members for compliance

In March 2026, the European Chemicals Agency (ECHA) launched a consultation on the Socio-Economic Analysis Committee (SEAC) opinion of the **Universal Per- and Polyfluoroalkyl Substances (PFAS) restriction**. Alongside the opinion of ECHA's Risk Assessment Committee (RAC), these serve as the basis for the European Commission's draft legislative proposal likely to be released in 2027.

Euro Chlor is therefore developing a dedicated **PFAS Compliance Task Force** to help its members and ensure they are well prepared for the restriction requirements. The remit of the Task Force is under discussion but is expected to include support with meeting the formal deadlines, engaging in substitution research, anticipating the building of compliant infrastructures and keeping pace with parallel legislative developments.

Focus on our **Safety**

Safety First; Our sector's unwavering commitment

The critical role of Chlor-Alkali in Europe's industrial resilience carries an equally critical responsibility: operating every facility to the highest safety standards for colleagues, neighbouring communities, and the environment.

Whilst real progress has been made in process safety and operational practice over recent decades, our members remain united around the conviction that every incident is one too many. Euro Chlor continues to monitor sector safety performance and invest in, refine and share best practices. This is because safety leadership is a constant commitment.



Updating the Safe Loading and Unloading video

Incident data over the past few years has shown a rise in loading and unloading incidents, with root causes overwhelmingly human in nature. High staff turnover, inexperienced recruits, economic pressures, and language barriers between lorry drivers and site operators are all playing a role here.

In response, Euro Chlor released a short animated video in January 2025, available with multilingual subtitles on its [YouTube channel](#), providing a safety checklist for drivers and operators.

Following its positive reception as a training tool, the video is now being updated with the help of member companies' technical experts to include greater use of pictograms to bridge communication gaps, clearer guidance on sampling procedures and improved visuals to better reflect real on-site conditions.

Keeping our sector's safety knowledge base current

Euro Chlor's technical and safety documents follow a structured five-year review cycle. This is complemented by annual updates, ensuring guidance stays accurate, relevant and aligned with the latest operational and regulatory developments.

Alongside this routine work, growing interest from both our members and external stakeholders has prompted a dedicated, in-depth **Guidance on Hydrogen Process Safety in Chlor-Alkali Production**. Covering the entire Hydrogen journey (from production through to delivery to the customer), it is being prepared to map out relevant processes and safety considerations. Publication is expected by the end of 2026.

Euro Chlor has also reviewed the applicability of its valve certification process (**GEST 17/492, Specifications and Approval Procedure for Valves to be Used in Liquid Chlorine or Dry Chlorine Gas**) with a view to extending the size range of valves to better reflect operational realities in certain installations.



Exploring how AI and automation can enhance our sector's safety performance

Euro Chlor member companies are exploring how AI and automation could strengthen safety performance. For anomaly detection and incident trend analysis, some members are already at the piloting stage. On the engineering side, automatic locks on loading points and improved site layouts to separate incompatible products are among the practical measures also under consideration.

Euro Chlor's General Technical Committee (GTC) is monitoring these developments closely to consolidate learnings and share best practices, with sector-wide recommendations to follow if clear safety benefits are demonstrated.

A new in-depth **Chlor-Alkali Hydrogen Guidance** is in preparation, covering the **entire product journey** from **production** through to **delivery** to the customer.

Facts and Figures about our sector's Safety



Process incidents and losses

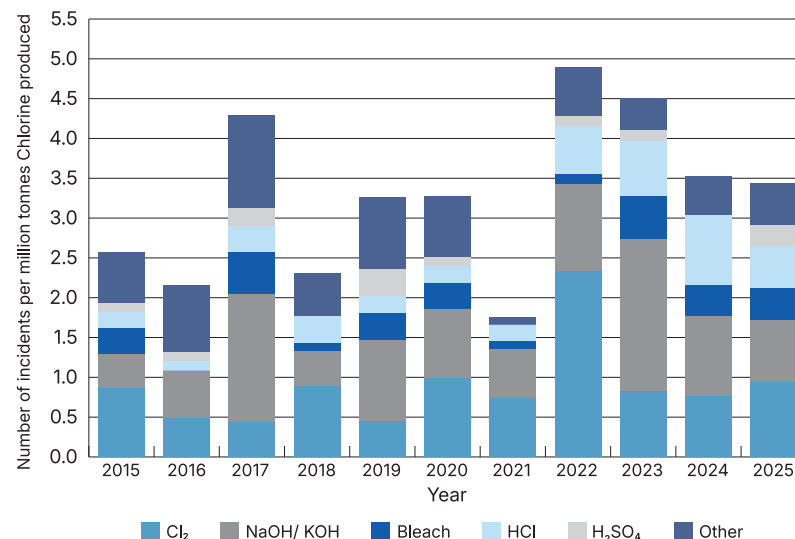
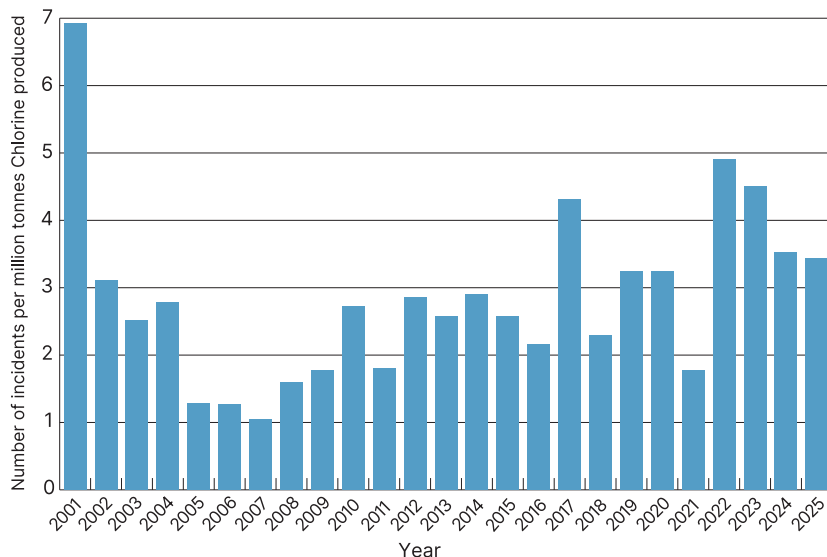
In 2025, we saw a **2.5% decrease** in our process incidents and losses compared to 2024, with **3.44 incidents** per million tonnes of Chlorine produced (*versus* 3.53 in 2024). In absolute numbers, this means a total of **26 process incidents** reported in our annual sustainability survey. This confirms the return to pre-pandemic levels. Euro Chlor members remain committed to further reducing incidents.

Loss of Primary Containment (LOPC) incidents and other process incidents

Since the start of our third Sustainability Programme in 2021, we have reported a breakdown of LOPC incidents by chemical.

In 2025, this breakdown reflects a similar pattern to previous years, with Chlorine and Caustic Soda accounting for the majority of reported incidents, whilst Hydrochloric Acid-related incidents decreased *versus* 2024.

34

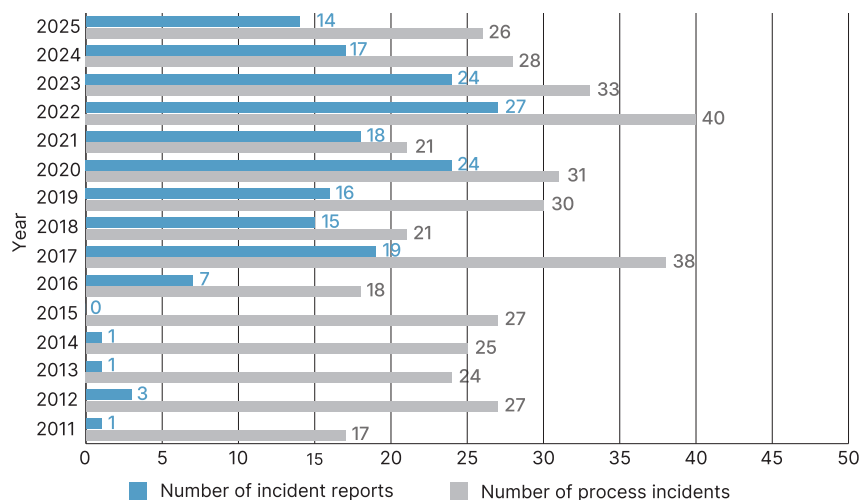




Incident reporting

The decline in incident reporting rates observed in previous years continued in 2025, with the reporting rate falling further to **53.8%**, down from 61% in 2024 and 73% in 2023.

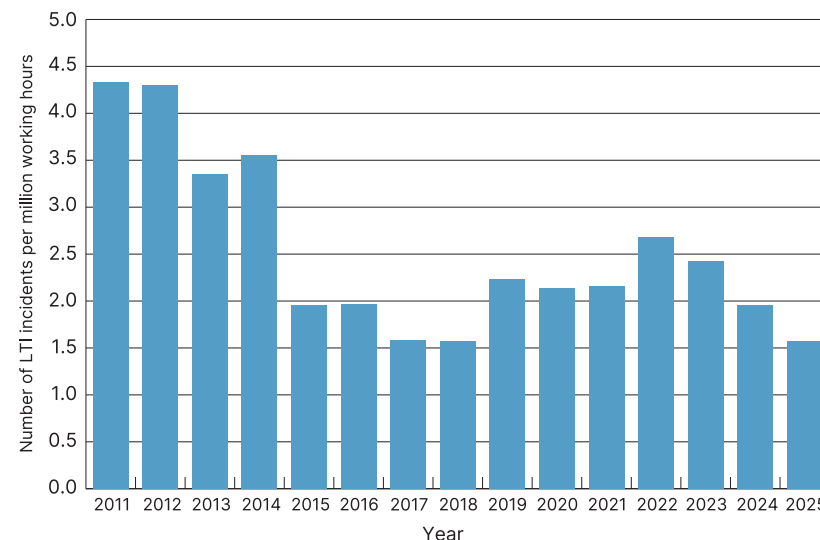
Euro Chlor continues to actively pursue missing reports, with the ongoing support of its Management Committee, to help reverse this trend and restore robust reporting levels across the sector.



Lost Time Injuries (LTIs)

We continue to see a **downward trend** in LTIs among member company staff and contractors, with the frequency rate falling from 2.42 per million working hours in 2023 to 1.95 in 2024, and further to **1.57** in 2025. This marks a return to pre-pandemic levels and represents the lowest rate recorded since 2018. It is also worth highlighting that **contractor-related incidents fell significantly compared with their 2024 peak**, reflecting the positive impact of ongoing, focused safety initiatives across our industry.

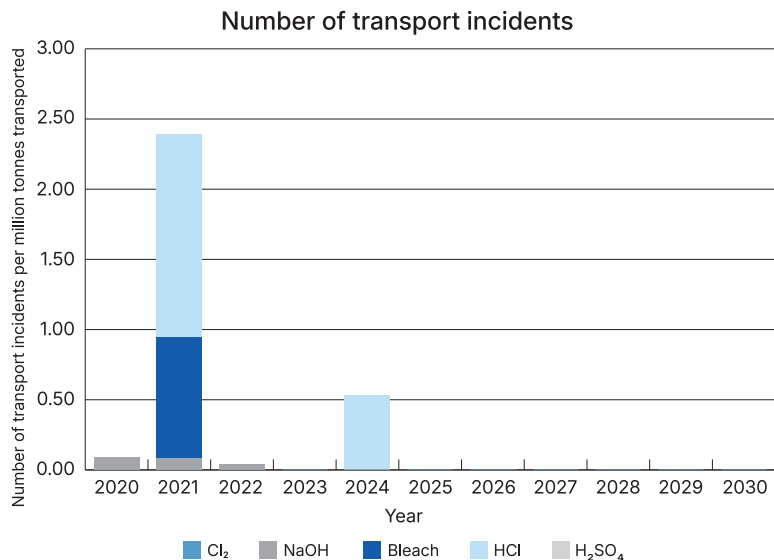
Chlor-Alkali LTI frequency rate



Facts and Figures about our sector's Safety

Transport incidents for Chlor-Alkali related products

2025 recorded **zero transport incidents**, representing a clear improvement on 2024. We remain committed to sustaining this.

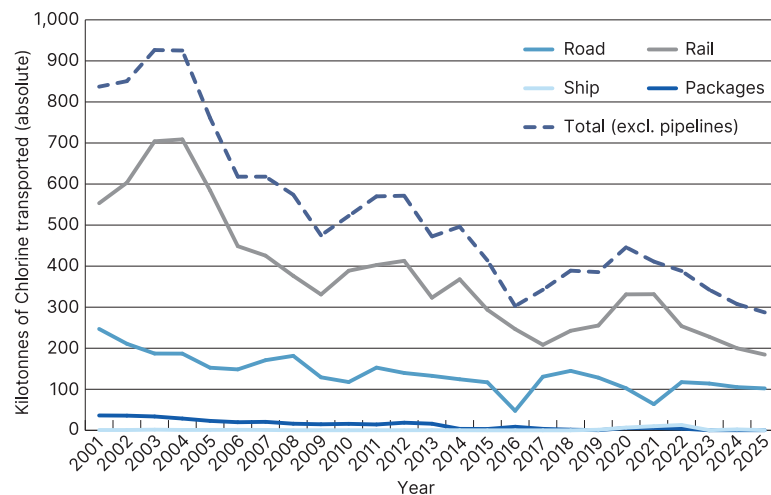


Transportation of Chlorine

For safety reasons, Chlorine is mostly converted and used on-site, or transported to neighbouring customer sites via pipeline.

In recent years, we have observed a **continuous downward trend** in off-site Chlorine transportation (excluding pipelines), with transported volumes dropping from 4.7% of total Chlorine production in 2023 to 3.8% in 2024, and further to 3.7% in 2025. This reflects a **growing shift towards short-distance pipeline transport**.

Modes of Chlorine transport outside industrial sites (excl. pipelines)





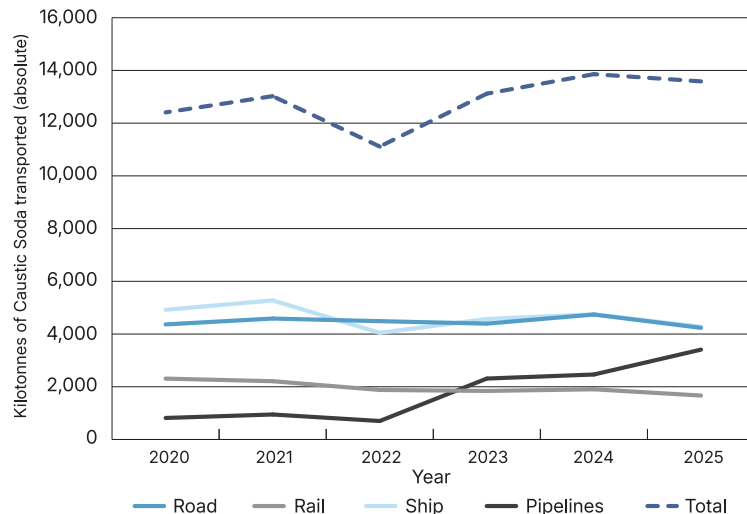
Transportation of Caustic Soda

Unlike Chlorine, the majority of Caustic Soda produced is transported off-site.

In 2025, the total volume of Caustic Soda transported through public areas remained broadly stable, reaching **13.6 million tonnes**, compared with 13.9 million tonnes in 2024.

Road and ship remained the primary modes of transport in 2025, each accounting for **31%** of the total volume transported. However, we have seen a **notable shift towards pipelines**, which accounted for **25.1%** of the total transported volume in 2025, up from 17.8% in 2024.

Modes of Caustic Soda transport in the public area



For both **Chlorine** and **Caustic Soda**, we see a **notable shift** towards **pipeline transport**.

Focus on our **Climate Neutrality**

Chlor-Alkali low-Carbon Hydrogen; An opportunity for our sector to contribute to Europe's decarbonisation

Alongside Chlorine and Caustic Soda/ Potash, we also have the production of low-Carbon Hydrogen. Putting this by-product to full use remains one of our sector's key climate commitments for 2050. This also provides a genuine opportunity for our industry to position itself as an active, credible contributor to Europe's decarbonisation ambitions and its emerging Hydrogen economy.

Although the utilisation rate has progressed over the past three years, finding suitable offtakes for our Hydrogen remains a challenge. Many Euro Chlor members are unable to connect to the grid, whether due to their remote location or the absence of an adequate local pipeline network.

Euro Chlor continues to flag these infrastructure constraints with the relevant authorities, especially given EU ambition here.

Putting Hydrogen to work; Euro Chlor's webinar series on Hydrogen utilisation

Turning our commitment into action on Hydrogen utilisation requires both inspiration and practical solutions.

To equip members with the knowledge and contacts needed here, since the spring of 2025, Euro Chlor has held a dedicated series of webinars bringing together innovative companies and technology providers in the Hydrogen space.

The series has cast a wide net, covering a diverse range of technologies and applications with topics ranging from Hydrogen certification schemes to the conversion of Hydrogen into electricity through fuel cell systems, the transformation of Hydrogen into value-added chemicals or fuels through biotechnology, on-site Hydrogen storage solutions, and the production of synthetic natural gas from Hydrogen and CO₂. Taken together, the sessions have showcased the breadth of pathways available for putting Hydrogen to productive uses, from grid electricity to advanced chemicals and beyond.

More webinars to come...



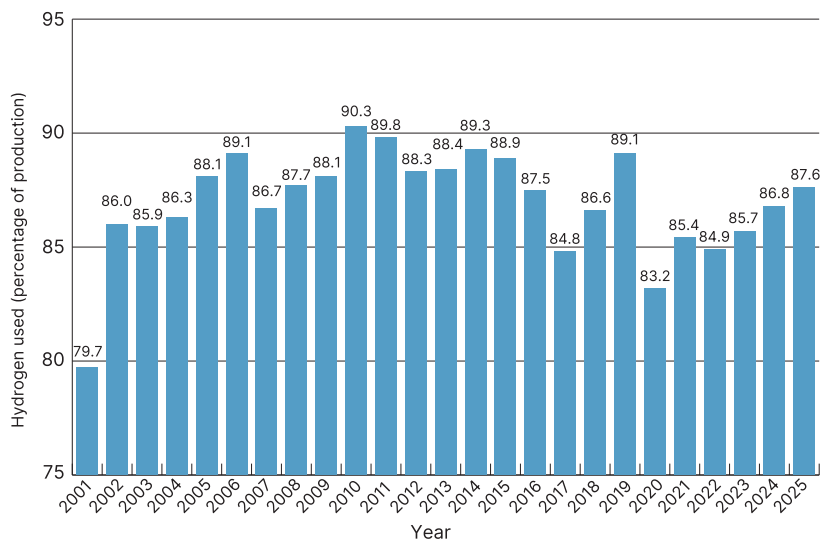
H₂
HYDROGEN



Chlor-Alkali Hydrogen utilisation

For the third consecutive year, we recorded an **increase in Hydrogen utilisation**, with the utilisation rate rising from 86.8% in 2024 to **87.6%** in 2025. This continued progress reflects our sustained efforts to maximise the value of our Hydrogen.

Note: The figure for vented Hydrogen varies from that reported previously as it results from a separate questionnaire with a slightly different level of detail.



2025 marked a **third** consecutive year of **rising Hydrogen utilisation**.

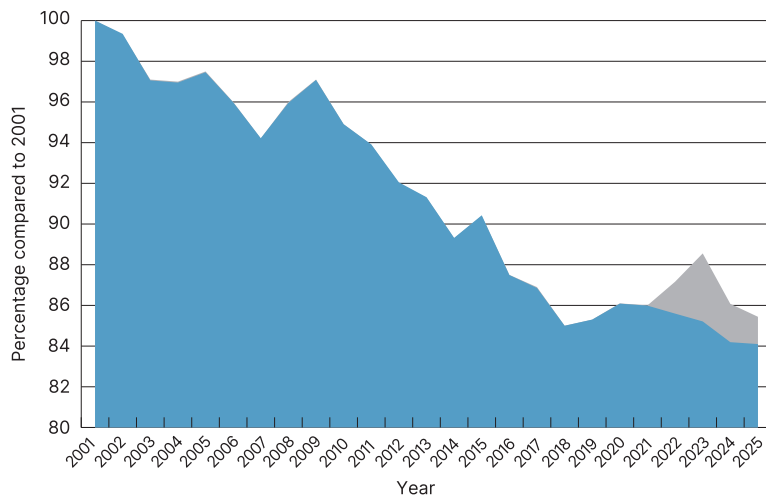


Primary fuel energy consumption

To measure the overall energy footprint of the Chlor-Alkali sector, we use a metric that combines both electricity and steam consumption, expressed on a relative scale to ease comparison over time.

In 2025, our **primary energy consumption reached 84.1%** compared to 84.2% in 2024 (relative to the 2001 reference year).

As for previous years, lower production rates may be influencing this figure, as electrolyzers are potentially run at lower current densities. When adjusted for the higher current densities associated with peak production (as in 2021), the 2025 figure rises to around 85.4% (shown by the grey area in the graph below).

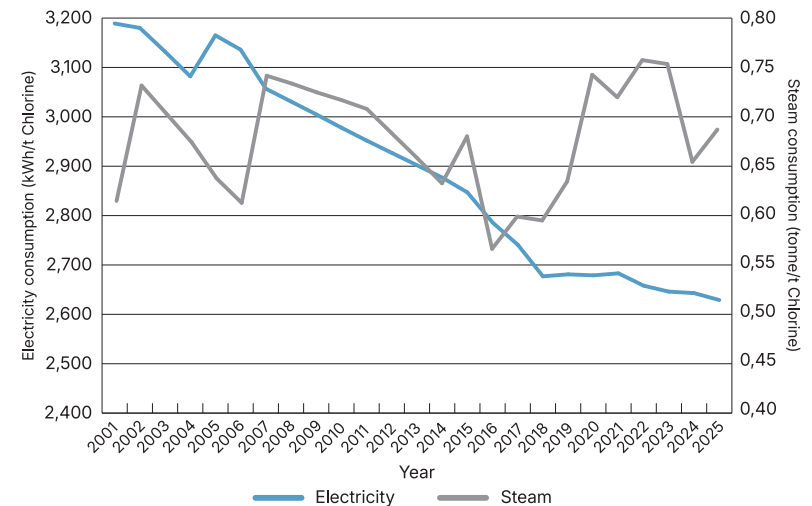


Energy and steam consumption

In 2025, **electricity consumption remained broadly flat** compared to 2024. In part, this could be because gains become harder to achieve as we near the practical limits of how much energy can be saved with the current technology. However, Euro Chlor companies and their suppliers continue to explore further opportunities to improve energy efficiency.

Steam consumption continues to fluctuate, particularly when production levels are low. This may be something that is further compounded by shifts in customer concentration requirements for Caustic Soda.

Electricity and steam consumption per tonne of Chlorine

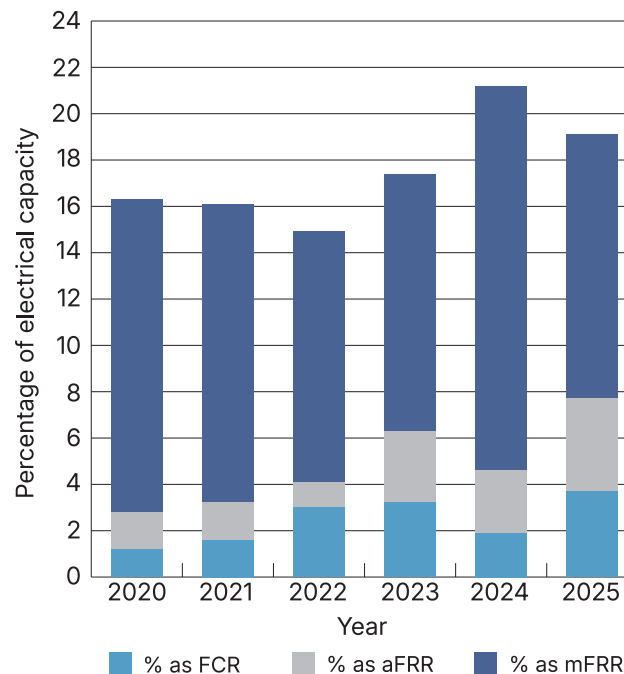


Grid balancing

This graph shows the flexibility support offered by Euro Chlor members, expressed as a percentage of total installed electricity demand capacity, since data collection started in 2020.

In 2025, **19.0%** of our capacity was available for grid balancing (down from 21.2% in 2024). This decline could be linked to the ongoing competitiveness challenges facing the European Chlor-Alkali sector, as flexibility requires substantial upfront investment.

Electrical capacity reserved for grid balancing



FCR = Frequency Containment Reserve

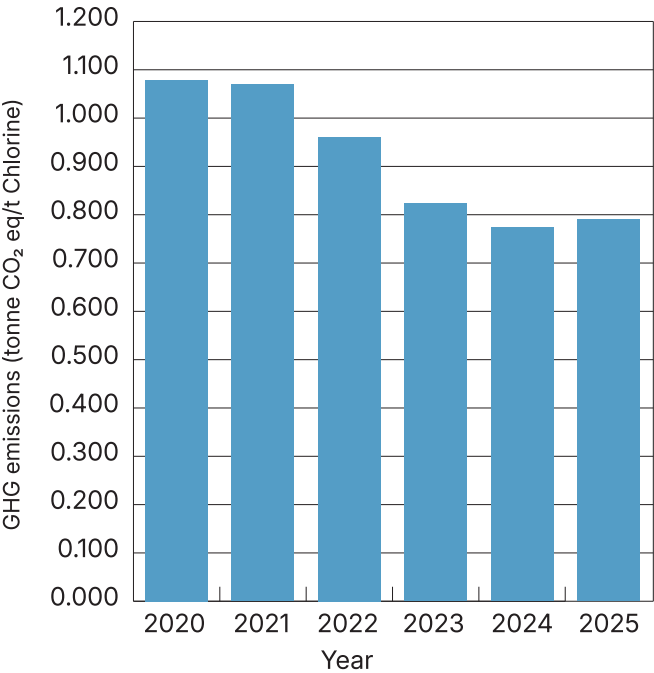
aFRR = automatic Frequency Restoration Reserve

mFRR = manual Frequency Restoration Reserve



Carbon footprint

Carbon footprint of Euro Chlor members' production



Since we began monitoring the Carbon footprint of our members' production in 2020, we have observed a 28.3% decrease.

In 2025, however, our **Carbon footprint rose for the first time, increasing by 2.1% to 0.79 tonnes of CO₂ per tonne of Chlorine produced** (up from 0.77 tonnes in 2024). This increase may be attributed to access to low-Carbon electricity and economic constraints on investment in energy efficiency or decarbonisation projects linked to our sector's competitiveness challenges.

Focus on our **Circularity**

A second life for our materials...

Chlor-Alkali is a fundamental chemical building block for a wide range of industrial processes and everyday products.

Yet, this central role also entails a responsibility to produce not only efficiently, but sustainably. This means rethinking how resources are used, recovered, and given a new purpose beyond our walls.

Across Europe, the transition towards a circular economy is reshaping how industries operate. Our sector remains committed to being a part of this transformation and doing more with less at every stage of production.

Moving towards zero-waste operations and maximising the recovery and recycling of materials across the value chain is part of our 2050 roadmap.

Recycling our membranes and electrodes; From waste to resource?

Euro Chlor member companies are stepping up efforts to recover and refurbish used membranes and associated metals from their electrolyzers, demonstrating both responsible end-of-life management and the economic value of these materials.

Work is therefore underway to build the infrastructure, partnerships and legal frameworks needed to scale these solutions.

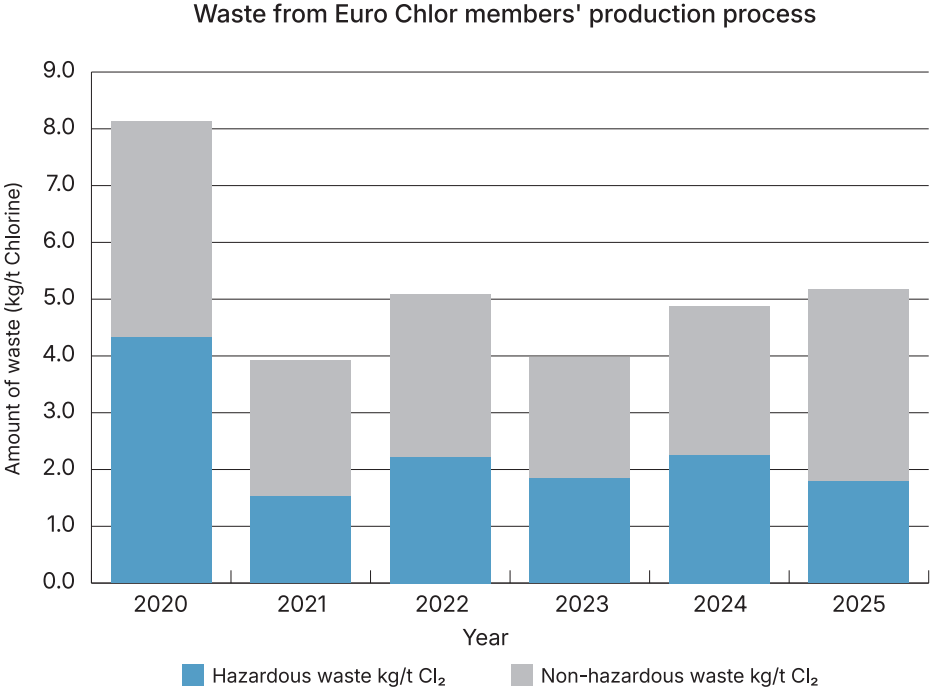


Waste from the production process

Since 2020, Euro Chlor has monitored the amount of hazardous and non-hazardous waste generated by its members.

In 2025, **total waste rose slightly to 5.2 kg per tonne of Chlorine** (*versus* 4.9 kg in 2024). Notably, though, **this overall increase masks a significant improvement in hazardous waste, which fell by 21.7%**, from 2.3 kg per tonne of Chlorine in 2024 to **1.8 kg** in 2025.

Despite a **slight rise in total waste**, we see a **significant improvement in hazardous waste** which fell by **21.7%**.



Focus on our **Communication**

Spring cleaning the Euro Chlor website

The Euro Chlor website has been telling our industry's story since 2010. Whilst it was last revamped in 2019, in early 2025, the secretariat began writing its next chapter.

With the goal of making the site simpler to navigate and better able to showcase our sector's contribution to Safety, Sustainability and Society, the redesigned homepage now spotlights the latest news and helps visitors reach what they need in fewer clicks. With a sharper search engine and improved accessibility, Euro Chlor hopes that the experience will be smoother for our key audiences.

The [new website](#) was launched on 01 April 2026 thanks to the support of Euro Chlor's Communications Committee.



A new toolkit to align our messaging around competitiveness

In April 2026, Euro Chlor launched a new [Communications Toolkit](#) to reinforce the critical importance of our sector for Europe.

Available in eleven languages, it equips Euro Chlor members with a consistent, ready-to-use set of materials: an overview of why Europe needs local Chlorine production, technical detail on the challenges of Chlorine storage and transport, and information sheets covering three vital applications – Public Health, Energy Transition and Feeding Europe.

The toolkit was developed to clearly demonstrate the need to protect the competitiveness of the European Chlor-Alkali sector.





One chemistry that cannot be split...

Chlorine never stands alone as it is produced together with Caustic Soda (or Potash) and (most frequently) Hydrogen. This means that any change in the availability of one of these chemicals has a direct impact on the others.

This interdependence is the subject of a [new animated video](#), which explains why Europe's Chlor-Alkali ecosystem must be understood, and protected, as a whole. However, balancing this delicate chemistry is not only a technical challenge; it is essential to European industrial resilience and everyday life.

New faces behind our '17 Careers' campaign...

Since May 2021, our '[17 Careers](#)' campaign has been telling the stories of Europeans whose professional lives are shaped by Chlor-Alkali chemicals.

Four new videos have been released over the past year, introducing **Ting Ting Tsai (BASF)**, **Andrea Montepara** and **Francesca Buccella (Società Chimica Bussi)** and **Marcel Wiesweg (Vestolit)**. Each offers a glimpse of the people behind our industry; the experts who keep it running safely and sustainably.

One final video remains to complete the series, bringing the total to seventeen voices; a tribute to Chlorine's atomic number!



Introducing '17 Connections'; The value chain reaction

Few people know that, for example, the same Chlorine that disinfects our drinking water is also used to make the PVC in hospital blood bags. That the same Caustic Soda that purifies aluminium for vehicles also helps to produce textiles. That the same Hydrogen that powers our buses also plays a part in growing the food on our plates. Our new '[17 Connections](#)' campaign sets out to change that!

These connections define our industry, and explain why a disruption to one chemical inevitably ripples through the others. Through infographics, short videos and storytelling, '17 Connections', a new member of our '17' campaign family, brings this strategic web to life. It shows just how much Europe relies on Chlor-Alkali chemistry working together for a wide range of everyday products.

Social media analytics reveal an increased exposure to our content:



6,951 views of our YouTube videos.



34,626 impressions on our 'Let's keep Chlor-Alkali in Europe!' LinkedIn post.



Our Instagram channel supported our '17 Careers' campaign well with one of the reels reaching **>800** views.

A pulse check on [Global Chlor-Alkali](#)

The World Chlorine Council (WCC); Regional updates and the road ahead

The World Chlorine Council's gathering in October 2025 in Vancouver brought together updates from across the globe. Very familiar global issues were seen at this meeting, including closures, the need for common safety guidelines, legislation on energy and emissions trading, and more. The meeting also benefitted from an in-person [Safety Seminar](#) where safety around loading and unloading was discussed in detail.

The group also discussed the future of WCC, with the consensus amongst delegates being that the organisation should continue in some form, but that activities would need to be refocused. A trial run of the new approach will be tied to the next in-person meeting scheduled for 2027. This will be led by the Chlorine Institute as the WCC secretariat was transferred to the United States for a two-year period in January 2026.



A busy year ahead; Navigating energy costs and a shifting regulatory landscape

Energy costs remain the most pressing concern for the European Chlor-Alkali industry. With power prices continuing to weigh heavily on operational competitiveness, the sector will be watching closely for any meaningful progress on EU energy market reforms, industrial electricity pricing mechanisms, and the broader debate around energy-intensive industries' long-term viability in Europe.

On the regulatory front, the European Commission's **Omnibus Simplification Packages** will continue to demand close attention. Whilst the promise of reduced administrative burden is welcome, the 'devil will be in the detail' to ensure that simplification does not inadvertently weaken hard-won regulatory clarity.

Equally significant is the ongoing development of a new approach to the **Chemicals Best Available Techniques Reference Document (BREFs)** under the **Industrial Emissions Directive (IED)**. Whilst not expected 'soon', Euro Chlor will engage all throughout this process to ensure that any requirements are both technically robust and operationally achievable.

Beyond these headline files, our sector will continue to follow the developments around the evolving rules on Chlor-Alkali substances as well as any increasing clarity to the PFAS regulatory landscape. These will impact the materials and processes used across the value chain.

Taken together, the coming twelve months promise a demanding but pivotal regulatory agenda.

Save the Date; 13th International Chlor-Alkali Technology Conference & Exhibition, 2028, Milan

Euro Chlor is delighted to announce that its **13th International Chlor-Alkali Technology Conference & Exhibition** will take place **from 30 May to 01 June 2028** in **Milan, Italy**.

This landmark event will bring together professionals from across the Chlor-Alkali sector for two and a half days of knowledge-sharing, technical exchange, and networking. The programme will again feature plenary sessions, a dedicated exhibition hall and networking events.

Whether you are a producer, supplier, researcher, or industry partner, this remains an unmissable opportunity to connect with the global Chlor-Alkali community and engage with the latest developments shaping our sector.

Registration will open in late 2027. Further details on the programme, pricing, and exhibition opportunities will be shared in due course via [our website](#).

We look forward to seeing you in Milan.



Our Members

Altair Chemical S.r.l.
Anwil SA
Arkema
BASF SE
Biomca Química SL
Bondalti Chemicals SA
Borregaard AS
BorsodChem Zrt.
Brenntag UK & Ireland Ltd
CABB AG
CABB GmbH
Covestro AG
Donau Chemie AG
Dow Deutschland Anlagengesellschaft mbH
Electroquímica de Hernani
Electroquímica Onubense, S.L.
Ercros SA
Fater S.p.A.
Halo Industry S.p.A.
Industrial Chemicals Limited (ICL)
INEOS Inovyn
Kapachim SA
Kemira Oyj

KEM ONE
Kuhlmann Europe
Lülsdorf Functional Solutions GmbH (ICIG)
Micro Bio (Irl.) Ltd.
MSSA SAS
Nobian
PCC Rokita SA
Potasse et Produits Chimiques (PPC) SAS
Química del Cinca SLU
Società Chimica Bussi S.p.A.
Spolek pro chemickou a hutní výrobu, a.s. (Spolchemie)
VESTOLIT GmbH (Orbia)
Vynova
Westlake Vinnolit GmbH & Co. KG



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 AGC Chemicals Europe Ltd.
 Ak-Kim Kimya Sanayi ve Tic. A.S.
 Al Kout Industrial Project Co
 AMB-Tech GmbH
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 Applitek NV/SA
 AQUAGROUP AG
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 Axiall, LLC - Westlake Chemical
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 Charam Techno Chemical & Equipments (P) Ltd.
 Chemoform AG
 CIA - Chemicals Industries Association Ltd
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 De Nora Deutschland GmbH
 Descote
 DSD Chemtech Projects & Services GmbH
 DUPONT ASTURIAS, S.L.
 Essencia ASBL
 Eu Salt aisbl (European Salt Producers' Association)
 Fariman Petrochemical Industries
 FEDERCHIMICA - Federazione Nazionale dell' Industria Chimica
 Forxar Industries Pvt Ltd.
 Garlock GmbH, an EnPro Industries company
 GEMÜ GEBR. MÜLLER APPARATEBAU GMBH & CO. KG
 GHC Gerling, Holz & Co Handels GmbH
 Groupe Gazechim
 HELM AG

Hunt & Mitton Valve Company
 Huntsman (Europe) BVBA
 Hydrus Hygiene Ltd
 IKEM - Innovation and Chemical Industries in Sweden
 IMPAG AG
 ISGEC Heavy Engineering LTD.
 IXOM
 Jiangsu Ancan Technology Co., Ltd.
 Jordan Bromine Company Limited - JBC
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 Mersen Pgy SAS
 Nankai Chemical Co., Ltd.
 NCP Chlorchem (Pty) Ltd
 Neeltran, Inc.
 Nirou Chlor Co.
 NORSK HYDRO ASA - HYDRO ALUMINIUM AS
 Nuberg Engineering Limited
 Olin Germany Upstream GmbH & Co. KG
 Permascand AB
 PHOENIX Armaturenwerke GmbH
 Powell Fabrication & Manufacturing LLC.
 Prince Rubber & Plastics Co., Inc.
 Qatar Vinyl Company (QVC) Q.P.J.S.C.
 Recherche 2000 Inc. - R2
 RELIANCE INDUSTRIES LIMITED
 Richter Chemie-Technik GmbH
 SALINEN AUSTRIA AG
 Sasol Chemicals, a division of Sasol South Africa (Pty) Ltd
 SAVINO BARBERA Srl
 SCHP - Association of Chemical Industry of the Czech Republic
 Scienceindustries
 Senior Aerospace Ermeto/ Ermeto Valves



SGL Carbon GmbH
Sibanye-Stillwater Sandouville Refinery
SIEM Supranite
Sojitz Europe plc
SPOLANA s.r.o.
STEULER-KCH GmbH
Syngenta Crop Protection Monthey SA
Technip Energies France SAS
Teijin Aramid BV
thyssenkrupp nucera AG & Co KGaA
Tosoh Corporation
UNIFLOW CONTROLS PRIVATE LIMITED
Valvosider S.r.l.
Vantage Leuna GmbH
VCI - Verband der Chemischen Industrie e.V.
Veltek Associates, Inc. - VAI®
VNCI - Vereniging van de Nederlandse Chemische Industrie
Xomox International GmbH & Co. OHG - Crane ChemPharma & Energy

Scan the QR code below to access the
Euro Chlor Data Book which compiles all
the graphs featured in this Review.

Available to Euro Chlor members only.



Euro Chlor supports a safe, sustainable and successful Chlor-Alkali industry for Europe.

Chlor-Alkali chemistry is a key building block for countless everyday products, and millions of European jobs depend on competitively priced supplies. It is equally vital to the innovative materials of tomorrow.

Euro Chlor's 37 producing members operate 60 manufacturing sites in 18 European countries; 97% of Europe's production capacity.

Euro Chlor represents the interests of European Chlor-Alkali producers, encourages best practices in safety, health and environmental protection, and promotes the economic and social benefits of Chlor-Alkali and the many industries that rely on it.

Based in Brussels, Euro Chlor is a Cefic (European Chemical Industry Council) Sector Group within the Halogens Industry Sector, and a member of the World Chlorine Council (WCC), a global network of regional organisations representing over 85% of worldwide Chlor-Alkali production capacity.

Photo courtesy of Nobian.

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A sector group of Cefic 

European Chemical Industry Council - Cefic aisbl

EU Transparency Register n° 64879142323-90

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