

From the Transition Pathway to the Action Plan: What's Next?



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The Transition Pathway



Why a Transition Pathway for chemicals?



- Strategic role of the chemical industry
- Backbone of EU value chains
- Multiple transformation pressures

Policy context

- European Green Deal
- EU Industrial Strategy
- Chemicals Strategy for Sustainability
- Fit for 55 and industrial resilience initiatives



What is the Transition Pathway?

- Co-created roadmap
- Long-term perspective
- Implementation-oriented
- Non-legislative instrument



Publication of the original document



- Stakeholder consultation process
- Shared vision and priorities
- Foundation for follow-up actions

Structure of the Transition Pathway

The Transition Pathway for the Chemical Industry is structured around 8 building blocks, ~190 actions



From pathway to implementation

- Living document
- Monitoring and follow-up
- Stakeholder engagement



Annual progress reports: purpose



- Track implementation
- Identify gaps and bottlenecks
- Highlight good practices
- Adjust priorities

Key developments so far

- Increased stakeholder mobilization
- Alignment with new EU initiatives
- Growing focus on resilience



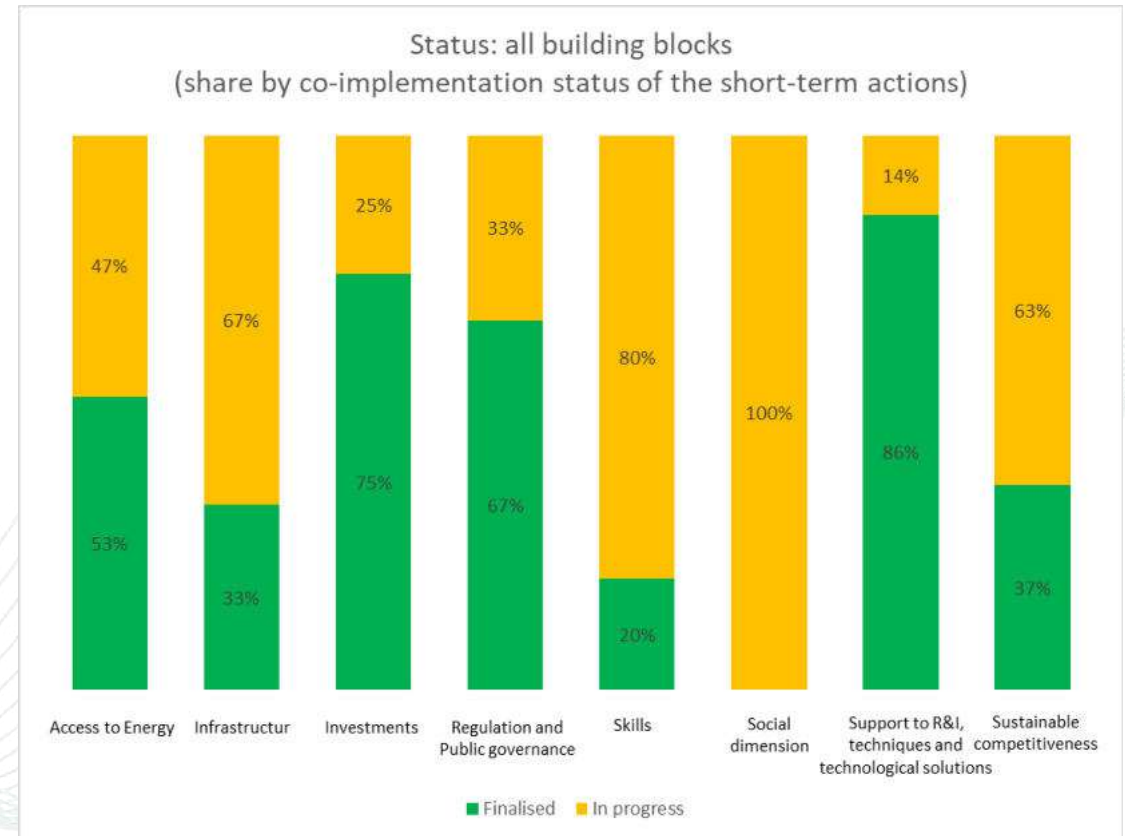
Key progress

- Electrification
- Alternative feedstocks
- CCUS
- Infrastructure challenges
- Chemical recycling
- Bio-based materials
- Safe and sustainable by design
- Energy costs
- Global competition
- Investment uncertainty
- New skills needs
- Reskilling and upskilling
- Social dialogue
- Multiple actors involved
- Need for structured cooperation
- Basis for Action Plan



Key progress

- Overview of the Transition Pathway progress in 2024



Key messages from the Transition Pathway

- Shared vision established
- Implementation is the challenge
- Need to move to delivery



The Action Plan



Why an Action Plan?

- Translate strategy into action
- Address implementation gaps
- Accelerate delivery



Action Plan: overall objective

- Support green and digital transition
- Strengthen competitiveness
- Improve resilience



Structure of the Action Plan

- Pillar-based structure
- Time-bound actions
- Identified actors



Which are the four pillars

1. Strengthening resilience
2. Securing energy supply & supporting decarbonisation
3. Creating lead markets & promoting innovation
4. Simplifying the regulatory framework



Role of stakeholders in the Action Plan

- Industry
- Public authorities
- Social partners
- Research and innovation actors



Monitoring and next steps

- Ongoing tracking
- Updates as needed
- Continued engagement



The Critical Chemicals Alliance



Why a Critical Chemicals Alliance?

- Supply chain vulnerabilities
- Strategic dependencies
- Geopolitical context



Background of the Alliance

- Emerged from policy discussions
- Linked to Transition Pathway and Action Plan



Objectives of the Alliance

- **Define Criticality:** Establish criteria to identify essential chemical productions and molecules for the EU's economy.
- **Enhance Monitoring:** Map critical chemicals and use EU systems for better trade oversight and early warnings for supply issues.
- **Coordinate Investment:** Align EU and national funding for strategic chemical projects to support modernization and new capacity.
- **Address Risks:** Tackle challenges like high energy costs, plant closures, and global trade disruptions.



Scope and focus areas (1/3)

- **Strategic Stakeholders:** Cooperation between the European Commission, EU Member States, regional authorities, industry leaders, investors, and civil society.
- **Targeted Value Chains:** Focus on chemicals that underpin 96% of manufactured goods, particularly those serving the energy, health, defense, and electronics sectors.
- **Vulnerability Mitigation:** Addressing the recent wave of over 20 major plant closures (e.g., steam crackers) to prevent further industrial decline.



Scope and focus areas (2/3)

- Identification of "Critical Molecules": Developing criteria to define which substances (such as ammonia, methanol, chlorine, ethylene, and propylene) are indispensable and at risk of supply disruption.
- Trade Resilience & Monitoring: Mapping critical molecules to facilitate early-warning systems for supply chain risks and import surges through the EU Customs Surveillance System.



Scope and focus areas (3/3)

- Investment & Funding Coordination: Aligning EU and national funding tools to support high-priority chemical projects and modernize production sites.
- Innovation & Sustainability: Fostering the development of safer alternatives and supporting the transition to a clean, circular economy through new technologies.
- Social & Worker Impact: Integrating social criteria into the definition of critical sites to protect jobs, health, and safety standards during industrial transitions.



How the Alliance works

- **Stakeholder platform:** Open to governments, companies, industry associations, investors, research bodies, and civil society.
- **Working groups:** Governed by a Steering Board with expert Working Groups and a General Assembly that meets regularly.
- **Evidence-based approach:** A direct follow-up to the EU's 2025 Chemicals Action Plan



Who can join?

- Industry
- Public authorities
- Research and innovation actors
- Other stakeholders



How to join the Alliance

- Expression of interest
- Participation in activities
- Contribution to workstreams



Added value for stakeholders

- Visibility
- Influence
- Collaboration opportunities



First steps

- The inaugural General Assembly is set for January 13, 2026, at Chemelot Chemical Park in the Netherlands.
- Organisations needed to apply by December 19, 2025, to attend this first meeting



Key takeaways

- Pathway sets the vision
- Action Plan drives implementation
- Alliance strengthens resilience



What's next?

- Continued implementation
- Stakeholder engagement
- Future updates

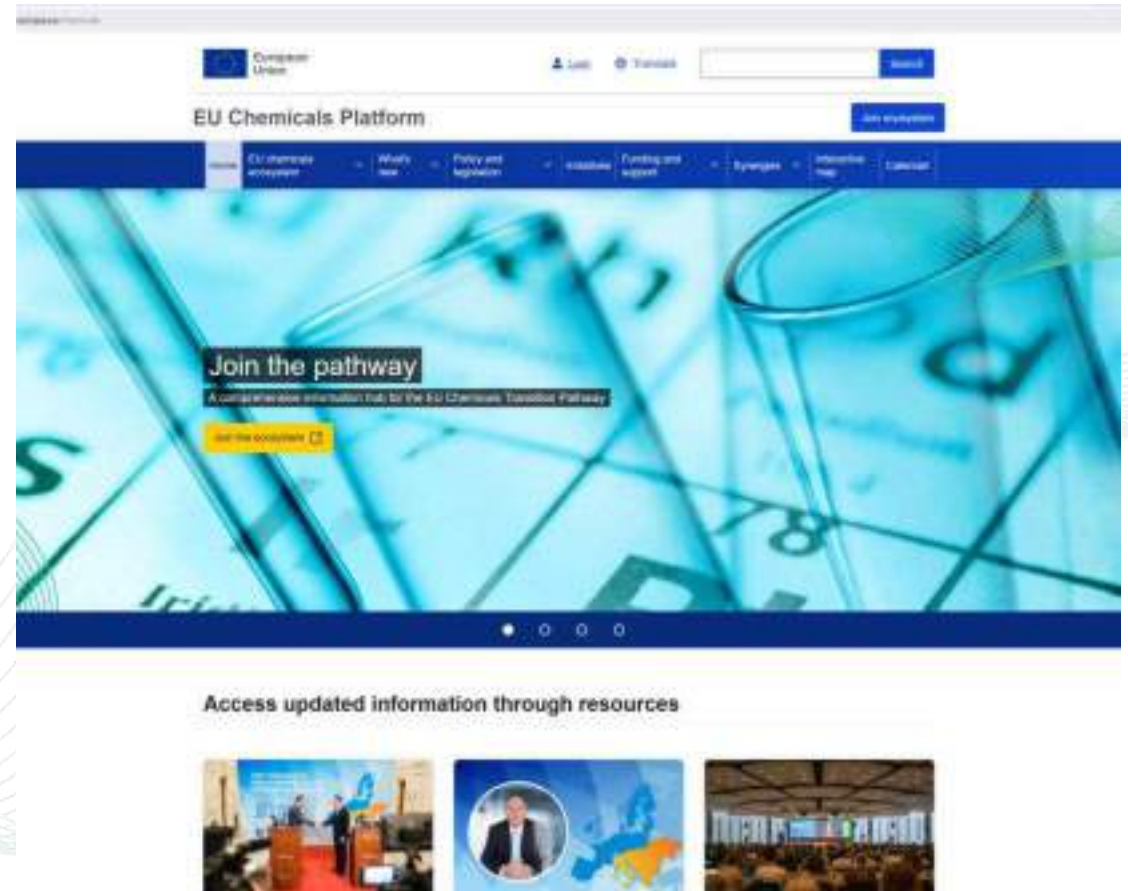


Stakeholders Support Platform



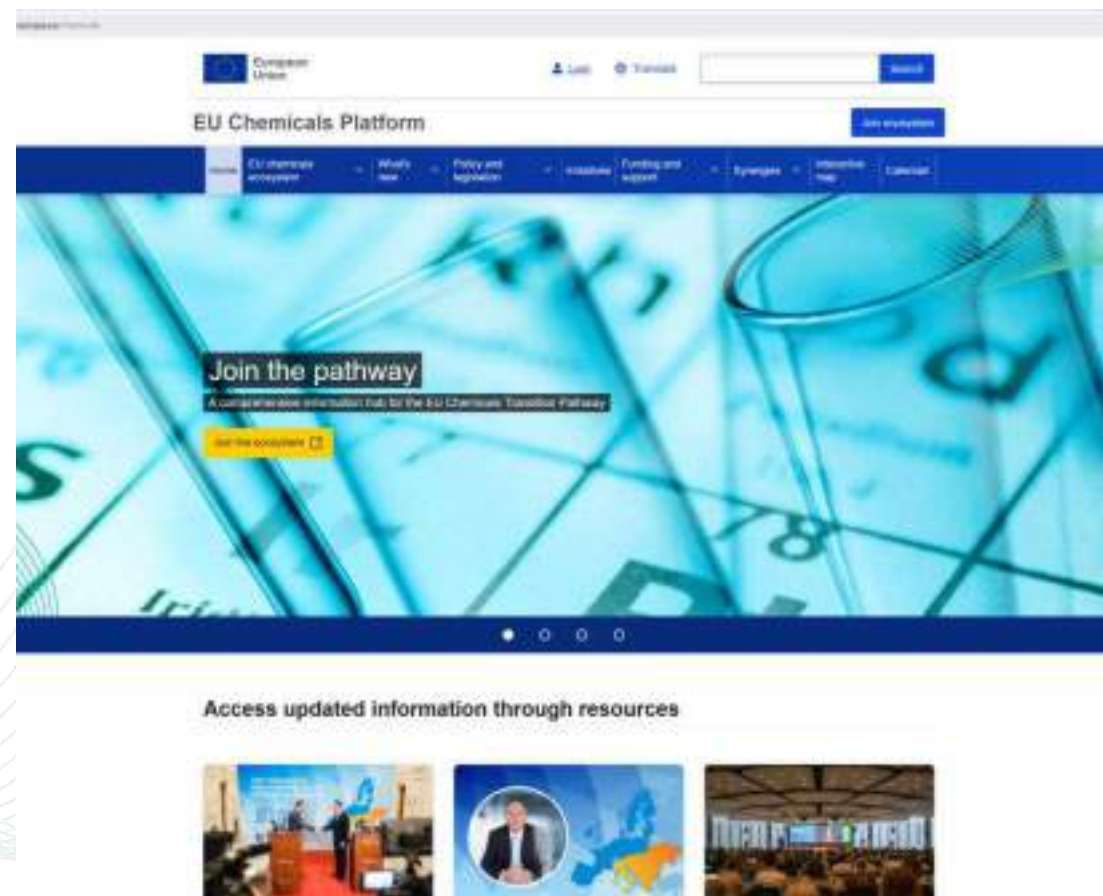
The platform

- The primary objective of the platform is to accelerate the twin transition (green + digital) within the EU chemicals ecosystem. It supports the Action Plan's ambition by:
 - Facilitating access to funding and support instruments;
 - Improving transparency about regulatory and policy developments;
 - Promoting collaboration among industry, research, regions and authorities;
 - Enabling initiatives to be shared and scaled across borders.
 - In other words, it bridges information, resources and actors to transform the industry.



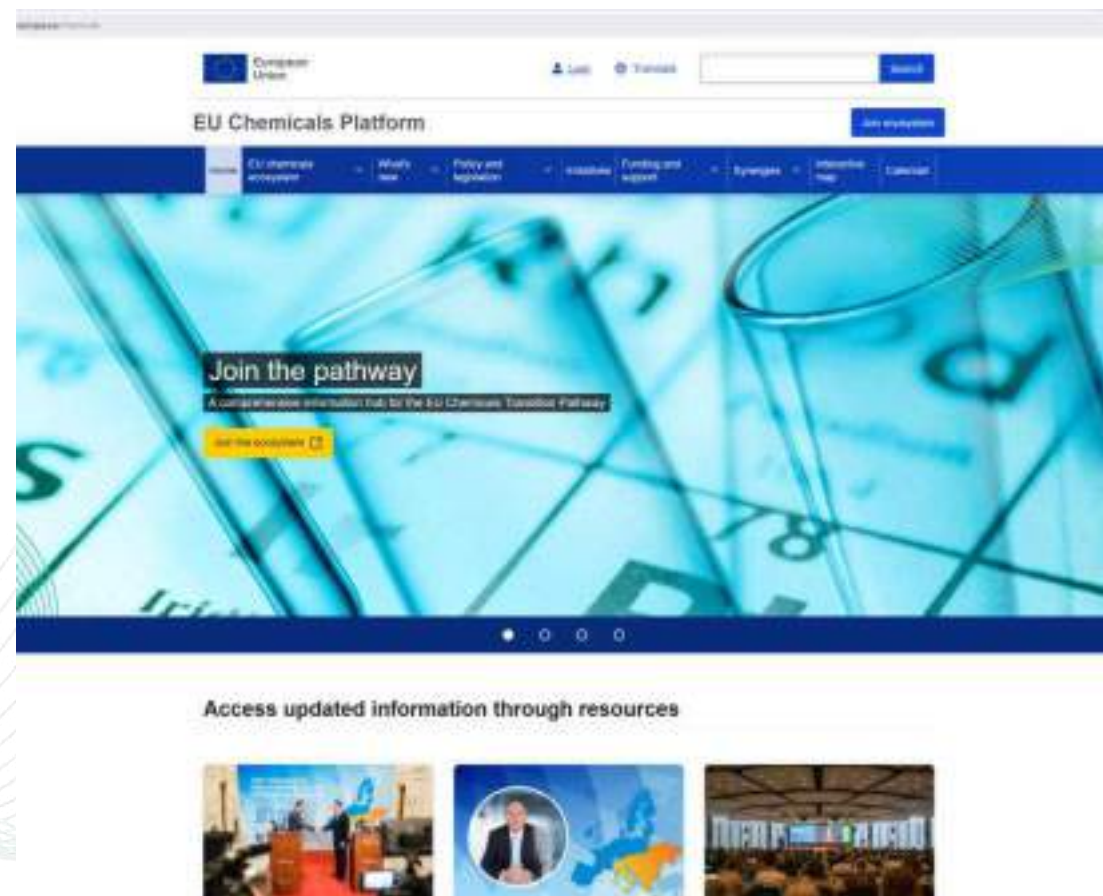
Join the platform

- Stakeholders can join the platform by clicking on the “Join the ecosystem” tab
- Use of ECAS account to join and log in



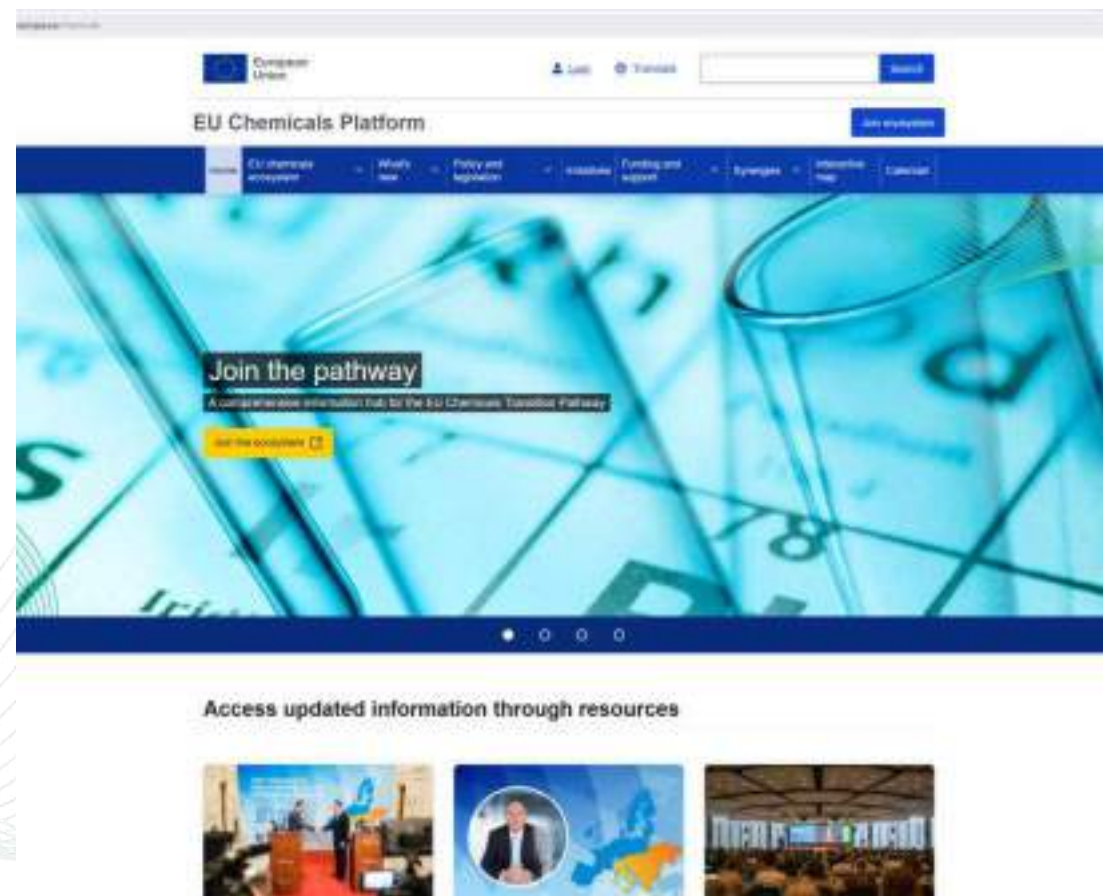
Platform categories

- **Home:** all information collected in one place
- **EU Chemicals ecosystem:** sectorial reports and statistics, all relevant to the Chemicals ecosystem
- **What's new:** news and multimedia relevant to the sector
- **Policy and legislation:** regulatory and policy updates relevant to the green and digital transition
- **Initiatives:** sum of stakeholder initiatives submitted so far
- **Funding and support:** EU and national funding instruments relevant to the sector
- **Synergies:** sectoral and cross-sectoral synergistic actions
- **Calendar:** all time sensitive actions



Join the platform here:

<https://transition-pathways.europa.eu/chemicals>



Q & A

For any questions, please contact: CHEM-TP@ec.europa.eu





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