

**YORKSHIRE
CHEMICAL
FOCUS**

your chemical future

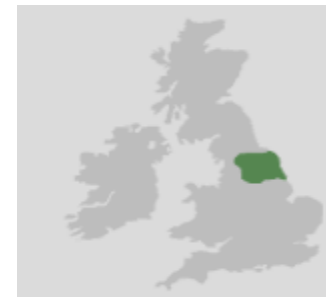
Developing International CMS Markets



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Yorkshire Chemical Focus



A not for profit industry-led company

Funded by:

Yorkshire Forward

(Regional Development Agency)

Member company contributions

Other sources

Yorkshire Chemical Focus



- Initiates or involved in projects/programmes relevant to the industry
- Initiate and hosts relevant seminars
- Industry contact via;
 - Face to face meetings
 - Website
 - Blog
 - Discussion Forum
 - Newsletters
 - Directory
 - Annual Conference
- Initiates and hosts network groups;
 - REACH
 - Chemskills
 - Responsible Care Cell
 - Personal Care Programme
 - CMS?



Chemical and Chemistry Using Industries in Yorkshire and Humber, and the UK



UK Chemical Industry

- 8th largest chemical producer globally
- 12% of Europe's \$650 billion chemical market
- 11% of UK's manufacturing GVA
- 3000 chemical companies
- Exports of \$50 billion annually
- 200+ international chemical companies
- Quality and diversity
- Large, growing and dynamic chemical sector

Chemical and Chemistry Using Industries in Yorkshire and Humber, and the UK



Yorkshire and Humber

- 10% of the regions economy
- Turnover of \$13 billion
- 300+ operating companies
- 25000 direct employees
- Majority of products exported
- Multi-nationals to start ups
- Bio-science, pharmaceuticals, agro chemicals, paints, lubricants, plastics, adhesives, detergents, personal care, perfumes
- 5 highly rated universities



CMS Case History



- Water Treatment Industry Pilot Completed in 2006, funded by Yorkshire Forward and supported by CSP and International eChem
- Achieved;
 - Sludge volume reduced by 15%
 - \$75K saving on the one pilot site
 - Significant energy savings drying the sludge
- Additional Benefits;
 - Reduced storage,
 - Reduced transportation
 - Lower disposal costs
 - Achieved regulatory requirements
- Now negotiating new contacts to include CMS process at up to 300 other sites



CMS Goals



- Introduction of the CMS process to a wider chemical market
- Provide assistance to current CMS providers and users in the UK and Europe.

CMS Target Sectors



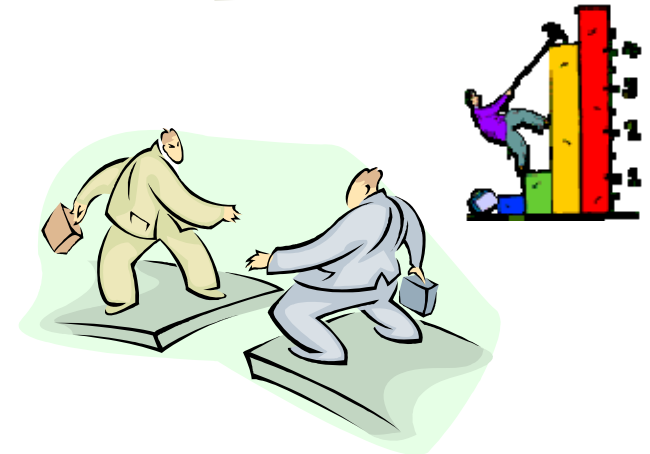
- Water utilities
- Food
- Electronics
- Aerospace/defence
- Personal Care
- Local Authorities
- Others



CMS Sector Challenges



- Lack of CMS understanding
- Fear of change/loss of control
- Competitor interactions
- Credit Crunch
- Currency fluctuations
- Raw Material Increases
- Regulatory changes



Building Stakeholder Interest and Support



- Department for Business Enterprise and Regulatory Reform (BERR)
- Knowledge Transfer Networks (KTNs)
- Regional Development Agencies (RDAs)
- European Chemical Regions Network (ECRN)

CMS Progress



- Funding from Yorkshire Forward to support dedicated CMS resource in YCF
- YCF CMS training in Detroit
- Introduction of CMS to other RDAs
- Introduction and interaction with 3 water utilities companies
- Liaison with 2 global water treatment companies
- UK contact with 6 CMS providers
- YCF conference CMS presentation by Jill Kauffman Johnson
- Development of CMS links with waste/environmental management company



Potential YCF CMS Offerings



- European CMS Forum
- CMS Training
- CMS Seminars
- Independent Baseline Studies
- Tender Assistance
- Contract Assistance
- Networking
- Regulatory Assistance
- Newsletters and website
- Etc

CMS Future



What Roundtable CMS Discussion

Where Syngenta Manufacturing Site,
Huddersfield, UK

When 11th December 2008