CHEMICAL CONVENTION
21-23 OCTOBER 2026

The Green Premium Dilemma and Opportunities



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Speakers



Mathieu Flamini
Co-Founder & CEO
GFBiochemicals

Kathrin Hein
VP Consumer Goods EIMEA
Henkel Adhesive Technologies





Eddie Sukkari
President Global Home Care and P&G PRO
Procter & Gamble

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Speakers



Janine van Kampen
Senior Policy Advisor Sustainable Chemistry
Dutch Ministry of Economic Affairs and Climate

Ronald van Klaveren
Vice President Global Chemical Sales & Sustainability
LyondellbasellI





Moderated by

Stephen Sackur
Presenter, Times Radio

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Sylvie Lemoine

Deputy Director General

Cefic

A comprehensive policy response to Europe's combined chemicals challenge



Cost Pressures

Energy - CO_2 - regulation



Import Pressure

Rising exposure to global competition



Massive investment needs

ETS 2 adding pressure



Weak demand

Limited willingness to pay a green premium

Combined pressure on Europe's chemical sector

A comprehensive, integrated industrial policy package

Competitive Production

Address energy and carbon costs; improve regulatory coherence

Markets for sustainable products

Build demand and a credible business case for lower carbon solutions.

Innovation & investment

De-risk projects and accelerate industrial scale-up in Europe

Maintain a competitive European production base

While enabling the transition to sustainable products

Demand creation: what are we talking about ?
Existing studies on the costs of green premiums

Deloitte (2025)

Using sustainable chemicals in final products raises retail prices by 2-3%

Example: 300ml Shampoo bottle would cost **7 cents** more

Stede et al (2021)

Effects of carbon price pass- through on consumer prices

Households would face an increase in expenditure by **0.4 – 0.45%.** Estimations cover all main energy-intensive industries

McKinsey

Net-zero abatement costs for a cross-section of consumer goods are between +2% and +15%

Example: The price of shampoo will increase **by 5%**

ETC (2019)

The use of sustainable materials slightly increases the prices of homes and everyday items

The price of a plastic bottle would increase by **2 cents**

World Economic Forum

The cost of cutting emissions ranges from 1% to 4% in end products

Example: Cars would **cost 2% more**

Haskoning

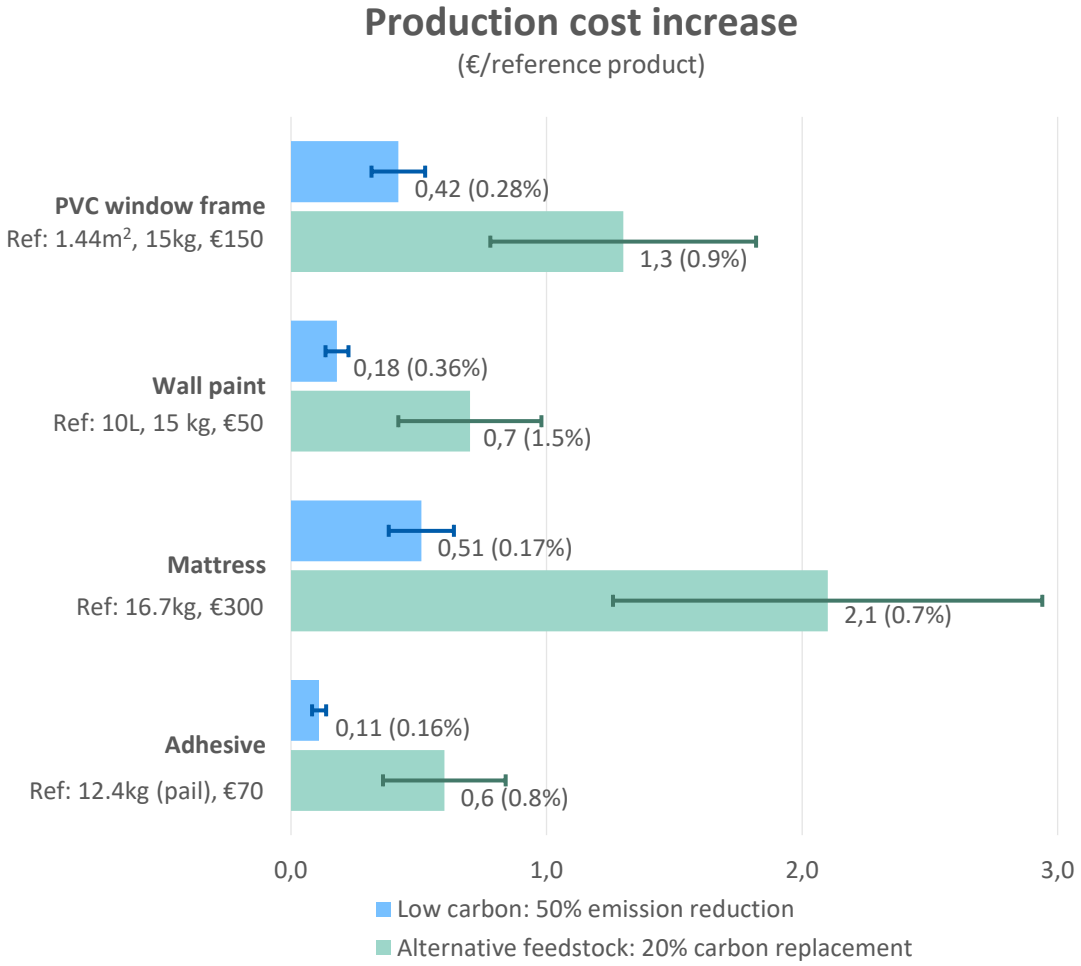
Projected 2030 pricing adjusted for baseline polymer price: Selected end products increase by 1% to 9%

Example: The price of a bottle of coke would increase by **4%**

*Cefic is current running a **new Green Premium Study** on the cost increase for circular and/or low carbon chemical use in six selected end products.*

New Cefic study: Preliminary results: cost impact of green premiums on selected downstream products

Production Cost Increase for a transition to low-carbon production technologies and alternative feedstocks in the chemical production process



Results are based on a capital recovery factor of 0.11 (~9 year pay-back time)

Starting point: Production cost increase for chemical producers switching from fossil-based production processes and feedstocks without abatement to low-emission technologies and biobased or circular feedstocks, while maintaining output of the same hydrocarbon platform chemicals. The scope of this analysis is limited to the chemical sector.

- **Bottom-up estimate** of the production cost increase from feedstock entering the chemical sector to final product, assuming full pass-through without mark-ups
- **Public, representative data** is used instead of plant-specific data, with transparent data quality indicators and use of proxies where needed.
- **The assessment excludes** energy-efficiency improvements, new production routes, and other potentially more cost-effective innovations; and is not intended as a technology comparison
- **Low-carbon transition pathway** considers a change in utilities, including switching energy carriers, process electrification, and CCS; cost increase is on top of ETS costs
- **Alternative feedstock transition pathway** considers replacing virgin fossil feedstocks with circular or biobased feedstocks to produce the platform chemicals

Results are preliminary and subject to substantial change as Guidehouse, Cefic Expert Group, and downstream stakeholder validation is ongoing. They should not be quoted, cited, published, or relied upon for commercial, policy, investment or other decision-making purposes.

DRAFT

Guidehouse

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Thank you for your attention



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