

Inland navigation and chemical industry transition

Threat or strategic advantage?

24 June 2026

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Tomorrow's chemical industry requires **solid logistical solutions** driven by the **safe transport** of molecules, within a **strong and flexible supply chain** supported by justified **no-regret infrastructure investments**.

**A decarbonized chemical industry and
Inland Waterway Transport: a perfect match?**

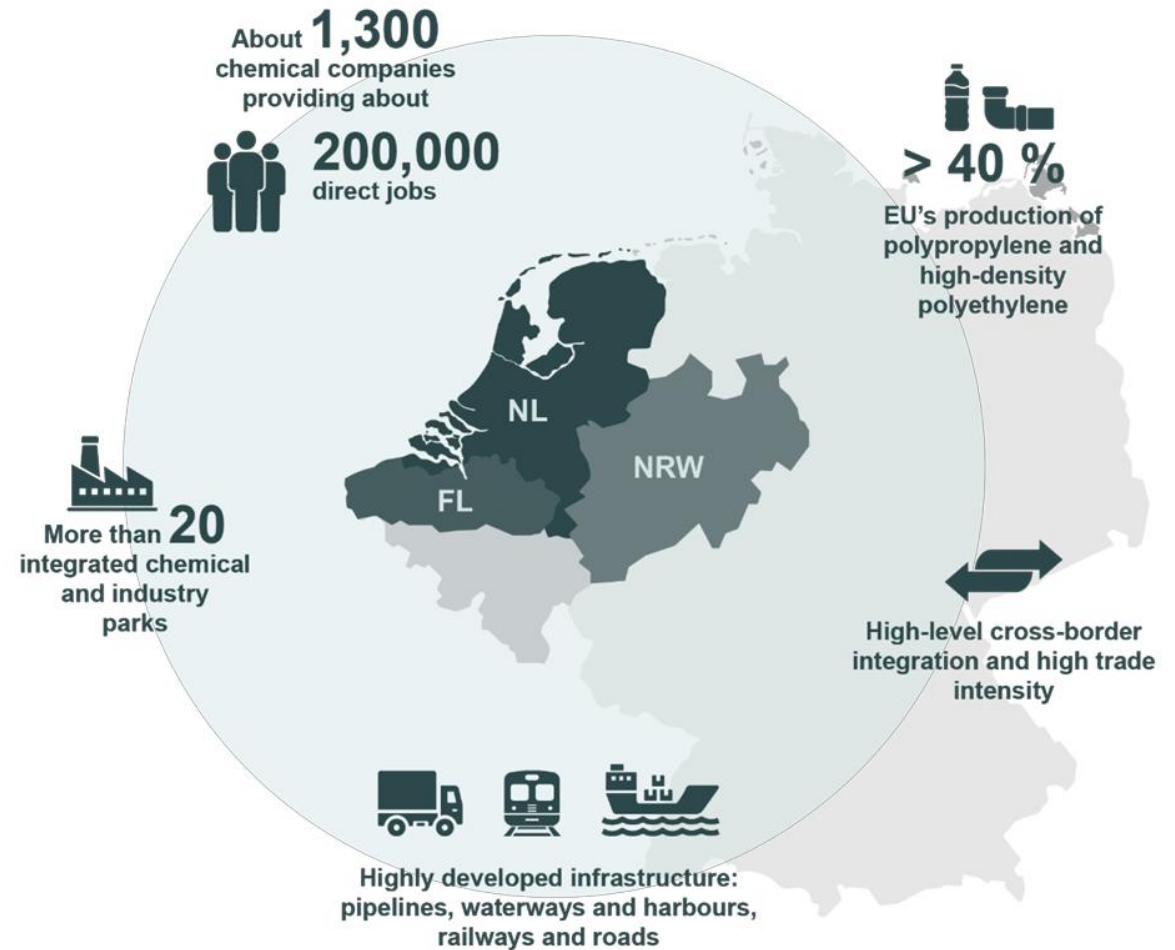


Trilateral Chemical Region



- Chemical cluster
- Similar challenges
- Become world's engine for the transition towards a sustainable and competitive chemical cluster

The cluster is the most integrated industrial ecosystem in Europe



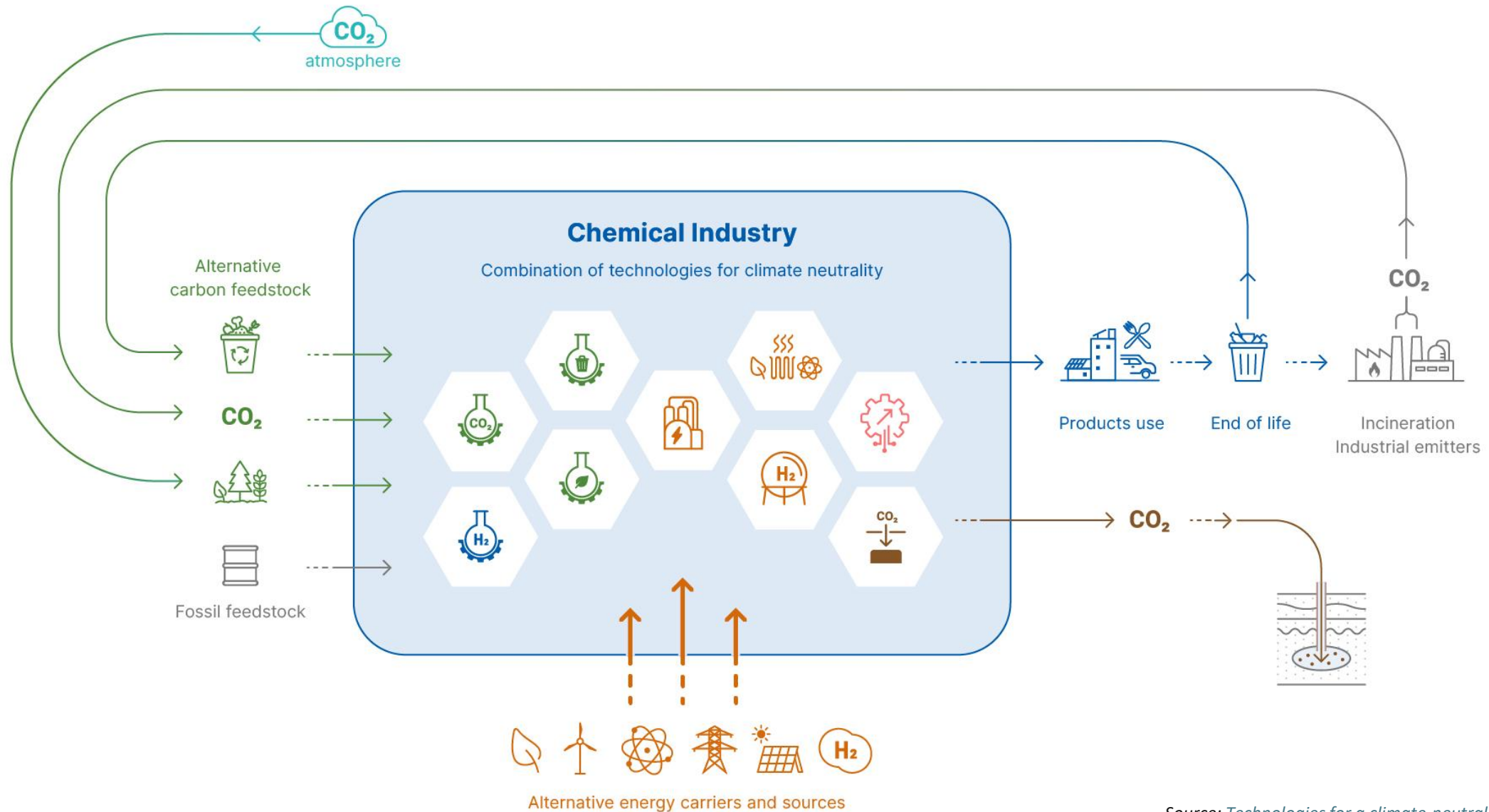
Trilateral Chemical Cluster under pressure



- Rising production costs (e.g. energy, emissions, regulatory)
- Increasing imports, particularly from subsidized overcapacity in China
- Decreasing exports
- Growing dependency
- Highly interdependent → domino effects across entire value chain

Europe recognizes these challenges and initiatives are launched, but concrete actions are necessary

Chemical industry decarbonisation path



Source: *Technologies for a climate-neutral chemical industry and barriers facing their implementation - cefic*

Challenges & preconditions



- Most technologies commercially available BUT not yet economically viable in Europe
 - High investment cost
 - More costly low-carbon feedstock and energy prices
- Competitiveness in a global environment
- Need stable permitting & regulatory certainty
- Strong logistical infrastructure and backbone investments

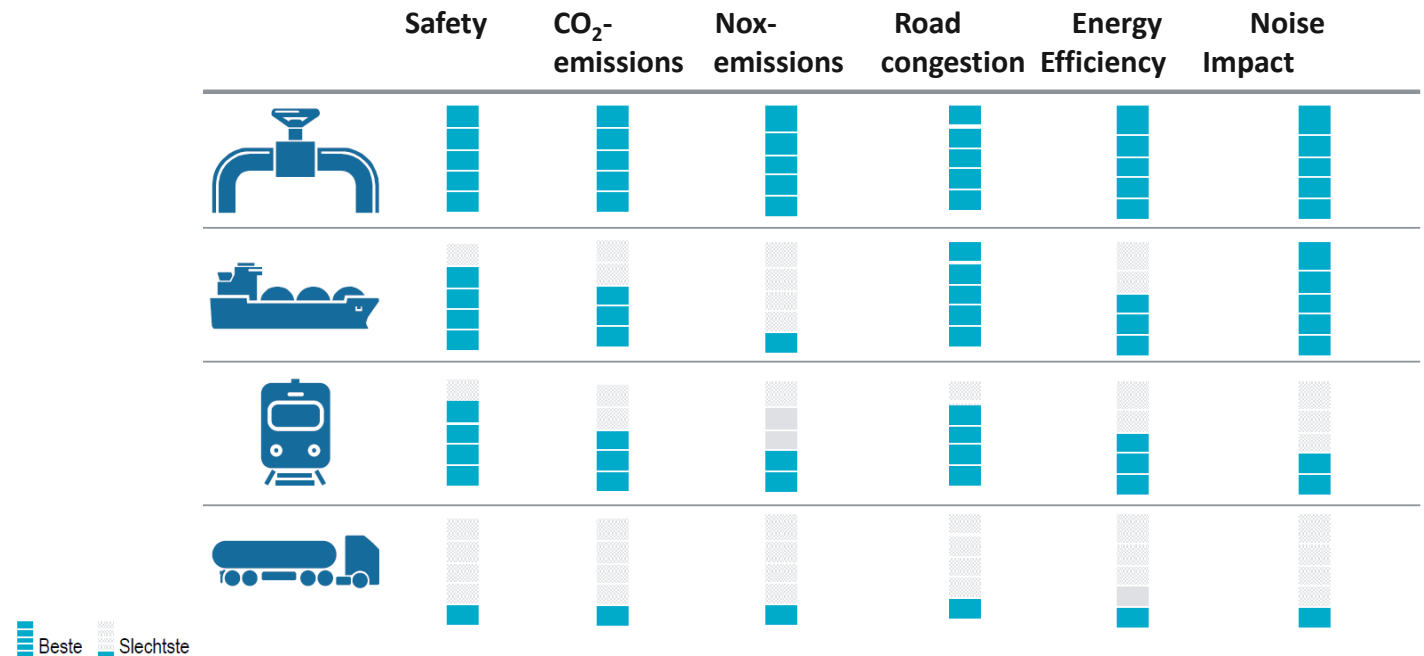
A transition is only successful if competitive conditions are guaranteed.

There is no “one size fits all solution”.

Chemical industry and transport modes



- Leverage strengths and strong expertise
- Agility (unseen mix of disruptions, geopolitical circumstances, energy crisis)
- Standstill is not an option
- Resilient & reliable
- Available capacity
- Lower external cost
- Strong safety records
- Trustworthy



Source: Roland Berger, 2018 based on data by Antea, VIL, PRC, APPE, CEFIC, Roland Berger

New markets



One can expect some transport **decrease** of fossil-based molecules and potential **increase** of:

- CO₂
- (e-)Methanol
- (bio)LNG
- Biofuels
- Sustainable Aviation Fuels
- Ammonia(-carriers)
- Circular economy products
- Hydrogen (all colors)

Versatile role of chemical industry

- Producer
- Raw material feedstock
- Energy feedstock
- For vessel propulsion transporting our molecules (if not electrified)

Chemical industry is familiar with treating these products.
Transport role of IWT and rail important,
pipeline when available.

Inland Waterway Transport challenges



- New vessel designs
- Loss of smaller capacity vessels
- Risk of reverse modal shift → secure competitive position
- Skilled workforce
 - Attractiveness
 - Remote & automated sailing
 - Innovation and digitalisation:

Involve shippers perspective

Inland Waterway Transport challenges



Engage new industries & support modal shift to reduce road congestion.

Chemical industry is and remains committed to IWT

Expanding to other industries will strengthen the user base

➔ Increase support for infrastructure investments!

➔ Launch a dedicated “Year of Inland Waterway Transport”



The future of IWT is bright if the conditions are met
and in a timely manner.

Investing in resilient waterways will continue to pay off in the
future.

IWT should not doubt its importance.





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