

March 11th, 2015

THE CHEMICAL WHOLESALE TRADE IN FIGURES – 2014

A. THE CHEMICAL WHOLESALE TRADE

I. Number of Chemical wholesalers, undertakings and jobs

	Companies	inventory-holding undertaking
inventory holding distribution ¹⁾	52	108
companies in import/export and speciality traders ²⁾	101	202
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total:	153 ³⁾	310

¹⁾ Stocks are held in the company's own or rented store as distinct from intermediate storage with shipping agents and storage companies.

²⁾ Includes commission agents and dealers who mainly deal in chemicals.

³⁾ According to the membership information given by the Verband Chemiehandel and the Hamburger Drogen- und Chemikalienverein - total: 133; the undertaking independent of the association were estimated at 20. The total number excludes the distribution companies owned by the chemical industry.

Total number of jobs: 7.160 (+ 1,7 % vs 2013)

of which:

inventory holding distribution: 4.965 (+ 2,1 %)

import/export and speciality traders: 2.195 (+ 1,0 %)

II. Turnover

total turnover: 13.412 (+ 4,0 %)
(in million € without value added tax)

of which:

- inventory holding distribution: 4.113 (+ 3,8 %)
- import/export and speciality trade: 9.299 (+ 4,1 %)

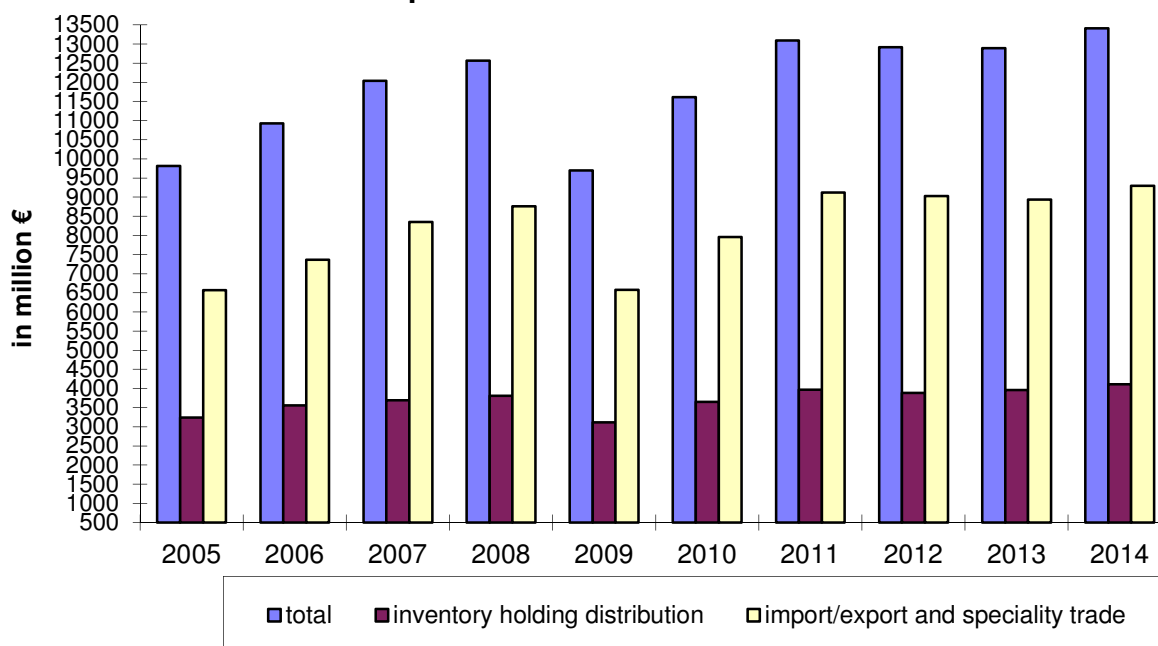
of which:

- inland: 5.014 (+ 2,2 %)
- subsidiaries abroad: 4.285 (+ 6,4 %)

inland turnover (9.127 Mio.€) is apportioned to

- direct shipment: 34,0 % (2013: 34,8 %)
- export to •• EU-Countries: 15,6 % (2013: 14,4 %)
- third countries: 10,4 % (2013: 9,8 %)

development of turnover 2005 to 2014



III. Procurement

Purchase value of goods

total import : 42,7 % (2013 : 42,0 %)
import by inventory keeping distributors : 25,8 % (2013 : 23,1 %)
import by import/export and speciality traders: 74,7 % (2013 : 73,9 %)

B. INVENTORY HOLDING DISTRIBUTORS BUSINESS

I. Company structure and turnover size of the inventory holding distributors (members of Verband Chemiehandel)

partnership and private companies	39	of which	
		• with branches	12
		• tied to a group	3
shareholding companies	13	of which	
		• with branches	8
		• tied to a group	5

Turnover classes

turnover per annum	up to	2,5 Mio €	4
	2,5 -	5 Mio €	10
	5 -	12,5 Mio €	13
	12,5 -	25 Mio €	12
	25 -	50 Mio €	8
	over	50 Mio €	5

II. Turnover in terms of quantity (in tons) ⁴⁾

acids and alkalis (solid and liquid)	4.124.000	(+ 5,5 % vs 2013)
solvents	890.000	(+ 5,4 %)
solid products	812.000	(+ 0,9 %)
specialities	524.000	(+ 1,1 %)
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total quantity	6.350.000	(+ 4,5 %)

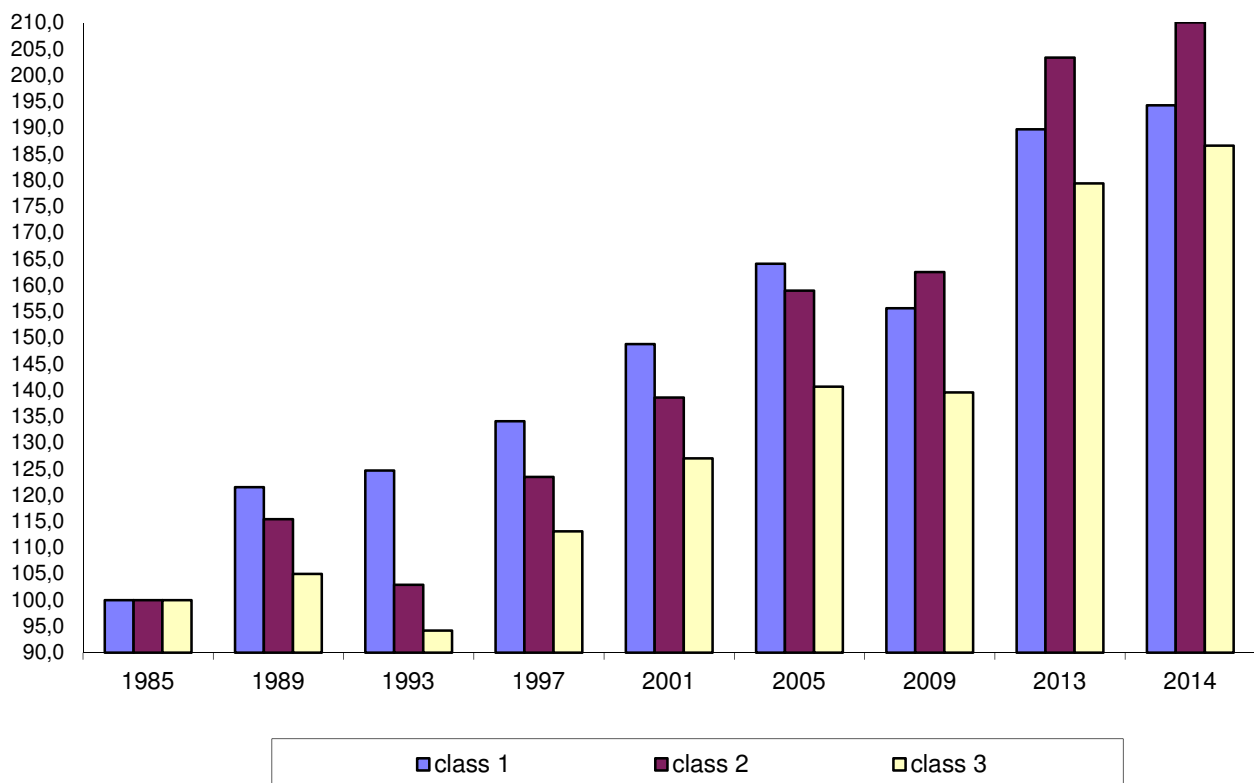
6) including direct shipments transacted by inventory keeping distributors.

Development of total quantity	
2005	5.817.000
2006	6.100.000
2007	6.193.000
2008	6.212.000
2009	5.411.000
2010	6.202.000
2011	6.159.000
2012	5.980.000
2013	6.077.000
2014	6.350.000

III. Development of turnover in the inventory keeping chemical distribution, classified in accordance with size of undertaking

	1985	1989	1993	1997	2001	2005	2009	2013	2014
<i>class 1:</i> <i>up to 5 Mio €</i>	100	121,5	124,7	134,1	148,8	164,1	155,6	189,7	194,3
<i>class 2:</i> <i>5-25 Mio €</i>	100	115,4	102,9	123,5	138,6	159,0	162,5	203,4	210,1
<i>class 3:</i> <i>over 25 Mio. €</i>	100	105,0	94,2	113,1	127,0	140,7	139,6	179,4	186,6

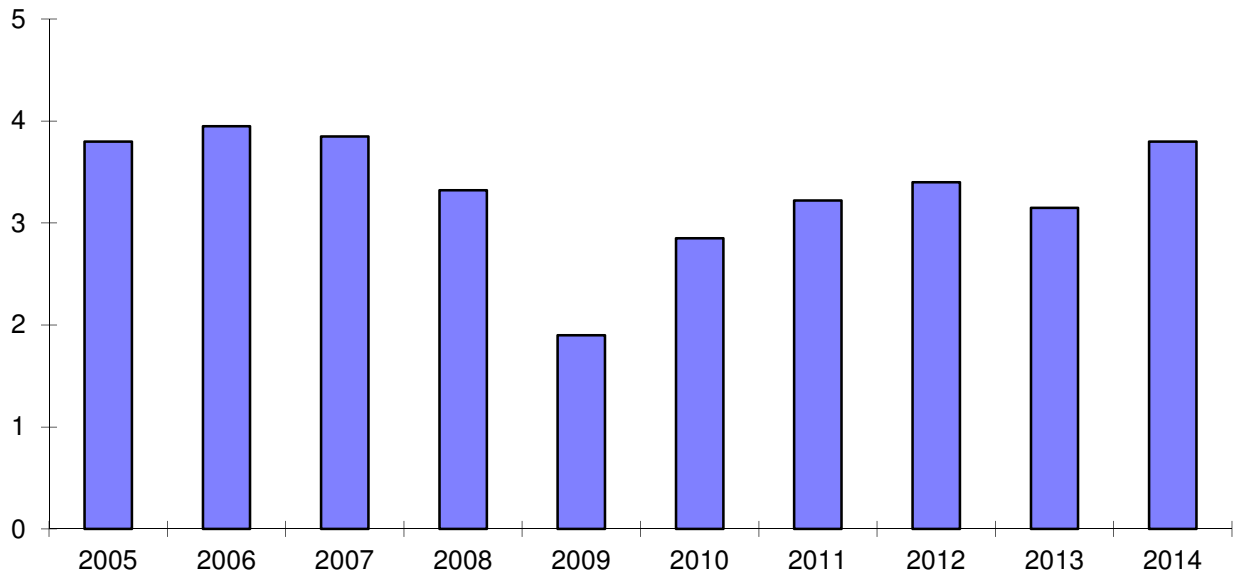
changes 2014 versus 2013 *class 1: + 2,4 %*
 class 2: + 3,3 %
 class 3: + 4,0 %



IV. Investments structure

average investment quota of the stock-holding trade (gross capital investment in % of turnover)

2014: 3,80 (2013: 3,15) - this results in an investment volume of 156 Mio € in 2014.



Investments (incl. leasing) by assets

warehouse buildings	6,5 %
other buildings	5,1 %
technical storage facilities (automation, computerised facilities etc)	27,9 %
truck facilities	23,7 %
investment due to environmental reasons	11,0 %
others	25,8 %

Purpose of investment⁵⁾

replacement/updating	65,9 %
expansion	18,4 %
rationalisation	20,1 %
environmental reasons	22,5 %

⁵⁾ double counting possible

Form of financing of investments

<i>profit and write-offs</i>	66,5 %
<i>increase of capital</i>	6,4 %
<i>restructuring of financial assets</i>	3,4 %
<i>loans</i>	23,7 %

Planned investments for 2015 are 105 % of the 2014 actual.

V. Storage and transport capacities

<i>stores for solids</i>	410.900 m ² (+ 0,4 % vs. 2013)
<i>stores for solvents (tanks and packagings)</i>	193.500 m ³ (± 0 %)
<i>stores for acids, alkalis and other liquids, (tanks and packagings)</i>	149.900 m ³ (- 0,5 %)
<i>transport vehicles</i>	802 (- 1,4 %)