

March 20th, 2018

THE CHEMICAL WHOLESALE TRADE IN FIGURES – 2017

A. THE CHEMICAL WHOLESALE TRADE

I. Number of Chemical wholesalers, undertakings and jobs

	Companies	inventory-holding undertaking
<i>inventory holding distribution</i> ¹⁾	51	105
<i>companies in import/export and speciality traders</i> ²⁾	105	204
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<i>total:</i>	156 ³⁾	309

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: 136; 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: 7.655 (+ 3,8 % vs 2016)

of which:

inventory holding distribution: 5.395 (+ 4,2 %)

import/export and speciality traders: 2.260 (+ 2,7 %)

II. Turnover

total turnover: 13.748 (+ 6,6 %)
(in million € without value added tax)

of which:

- inventory holding distribution: 4.387 (+ 9,7 %)
- import/export and speciality trade: 9.361 (+ 5,2 %)

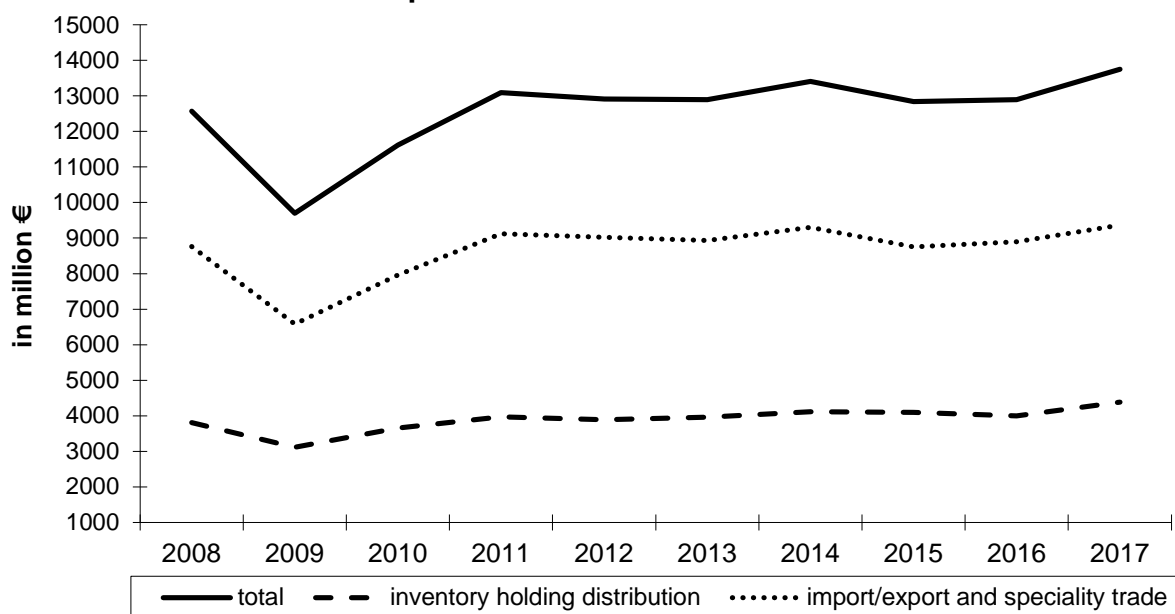
of which:

- inland: 5.028 (+ 4,7 %)
- subsidiaries abroad: 4.347 (+ 6,1 %)

inland turnover (9.415 Mio.€) is apportioned to

- direct shipment: 34,0 % (2016: 34,9 %)
- export to •• EU-Countries: 17,2 % (2016: 16,1 %)
- third countries: 12,8 % (2016: 11,7 %)

development of turnover 2008 to 2017



III. Procurement

Purchase value of goods

total import : 45,0 % (2016 : 44,2 %)
import by inventory keeping distributors : 27,1 % (2016 : 24,5 %)
import by import/export and speciality traders : 75,4 % (2016 : 75,3 %)

B. INVENTORY HOLDING DISTRIBUTORS BUSINESS

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

partnership and private companies	41	of which	
		• with branches	13
		• tied to a group	3
shareholding companies	13	of which	
		• with branches	9
		• tied to a group	5

Turnover classes

turnover per annum	up to	2,5 Mio €	4
	2,5 -	5 Mio €	9
	5 -	12,5 Mio €	13
	12,5 -	25 Mio €	14
	25 -	50 Mio €	9
	over	50 Mio €	5

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

acids and alkalis (solid and liquid)	4.089.000	(- 1,2 % vs 2016)
solvents	904.000	(+ 6,9 %)
solid products	782.000	(- 0,4 %)
specialities	630.000	(+ 12,7 %)
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total quantity	6.405.000	(+ 1,2 %)

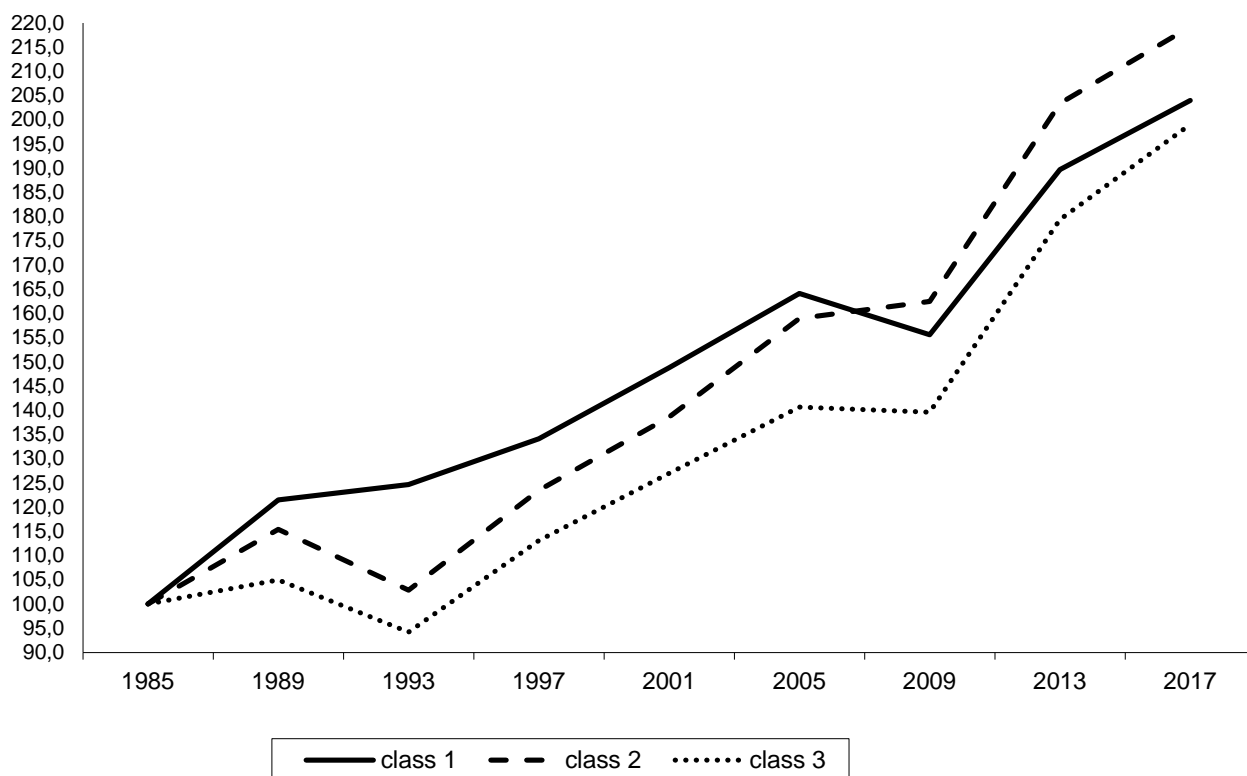
6) including direct shipments transacted by inventory keeping distributors.

Development of total quantity	
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
2015	6.263.000
2016	6.329.000
2017	6.405.000

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

	1985	1995	2005	2015	2016	2017
class 1: up to 5 Mio €	100	132,4	164,1	193,0	189,3	204,0
class 2: 5-25 Mio €	100	121,0	159,0	207,8	202,2	219,2
class 3: over 25 Mio. €	100	108,4	140,7	185,6	181,1	199,0

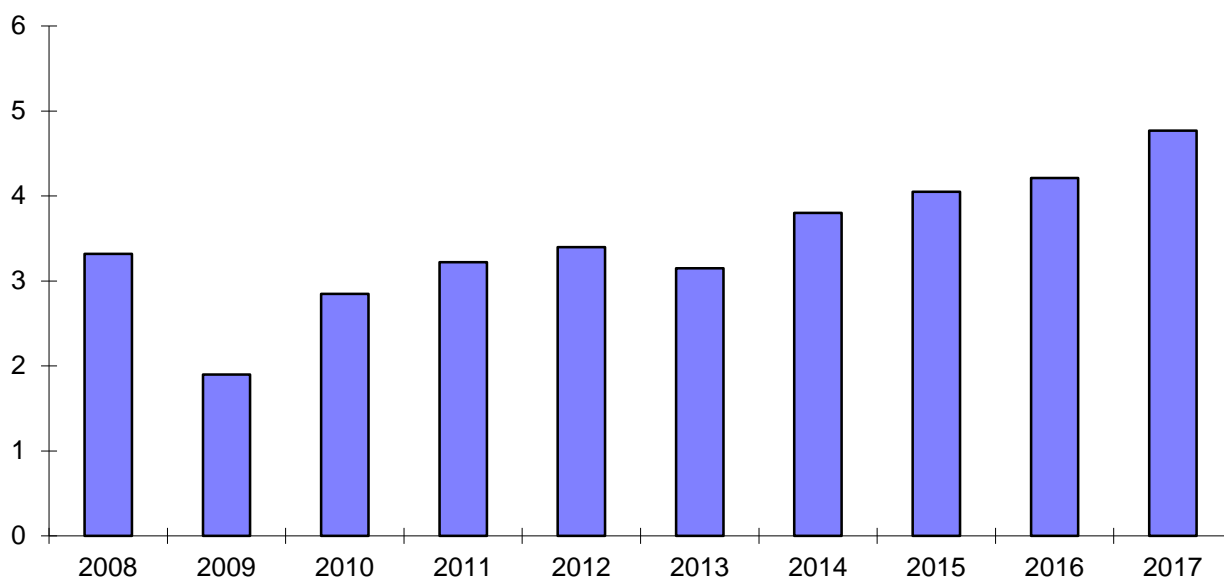
changes 2017 versus 2016 class 1: + 7,8 %
 class 2: + 8,4 %
 class 3: + 9,9 %



IV. Investments structure

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

2017: 4,77 (2016: 4,21) - this results in an investment volume of 209 Mio € in 2017.



Investments (incl. leasing) by assets

warehouse buildings	10,4 %
other buildings	3,1 %
technical storage facilities (automation, computerised facilities etc)	28,3 %
truck facilities	25,9 %
investment due to environmental reasons	15,5 %
others	16,8 %

Purpose of investment⁵⁾

replacement/updating	66,5 %
expansion	30,2 %
rationalisation	15,4 %
environmental reasons	27,7 %

⁵⁾ double counting possible

Form of financing of investments

<i>profit and write-offs</i>	74,1 %
<i>increase of capital</i>	5,0 %
<i>restructuring of financial assets</i>	3,6 %
<i>loans</i>	17,3 %

Planned investments for 2018 are 110 % of the 2017 actual.

V. Storage and transport capacities

<i>stores for solids</i>	413.300 m ² (+ 0,1 % vs. 2016)
<i>stores for solvents (tanks and packagings)</i>	193.400 m ³ (+ 0,3 %)
<i>stores for acids, alkalis and other liquids, (tanks and packagings)</i>	150.700 m ³ (± 0 %)
<i>transport vehicles</i>	821 (+ 0,5 %)