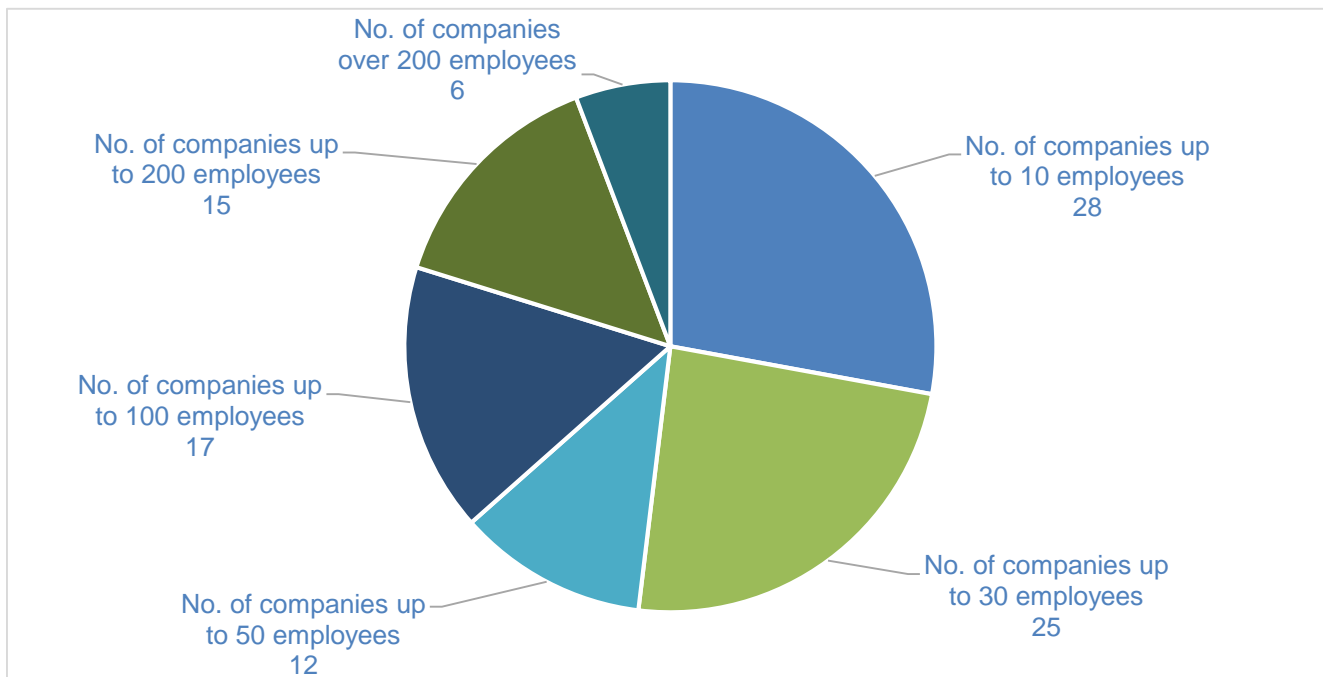


## THE CHEMICAL WHOLESALE IN FIGURES - 2020

### Structure of company members



The Association of Chemical Distributors (VCH) represents stockholding, import/export and speciality Distributors in Germany. The members structure is composed of mainly small and medium sized companies.

### Structure

Members of Verband Chemiehandel (ordinary members 2020):	<b>104</b>
Number of Premises (office and warehouse):	<b>224</b>
Number of own warehouses:	<b>66</b>
Use of service providers for storage:	<b>46</b>

## Number of employees (in Germany)

	<b>Number</b>	<b>Changes vs. 2020</b> (in %)
<b>Employees total</b>	7.921	+ 1,0

*Note: A distinction in the area of employees “stockholding distribution” and “speciality distribution” has been discontinued. A clear distinction is no longer possible due to the company structures.*

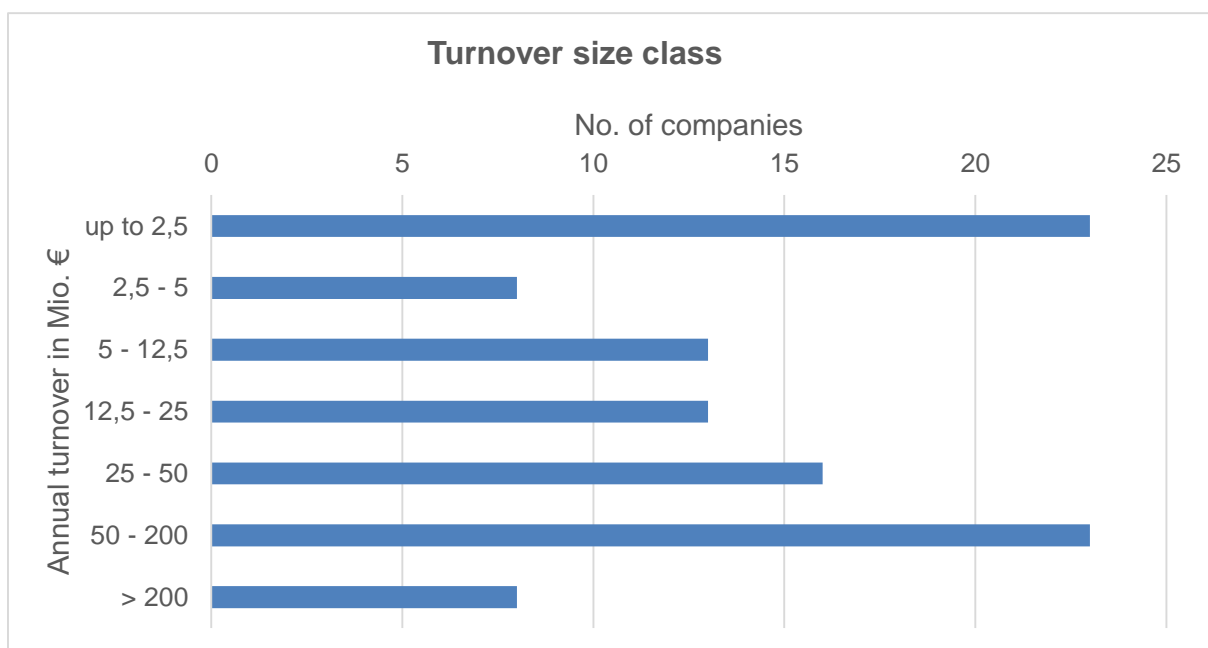
**Question:** Do you plan new recruitments for 2021?

**Answer:** A third of the companies expressed to recruit new staff.

**Compared to 2020:** In 2020, just under half of the companies planned new recruitments.

## Turnover size classes\*

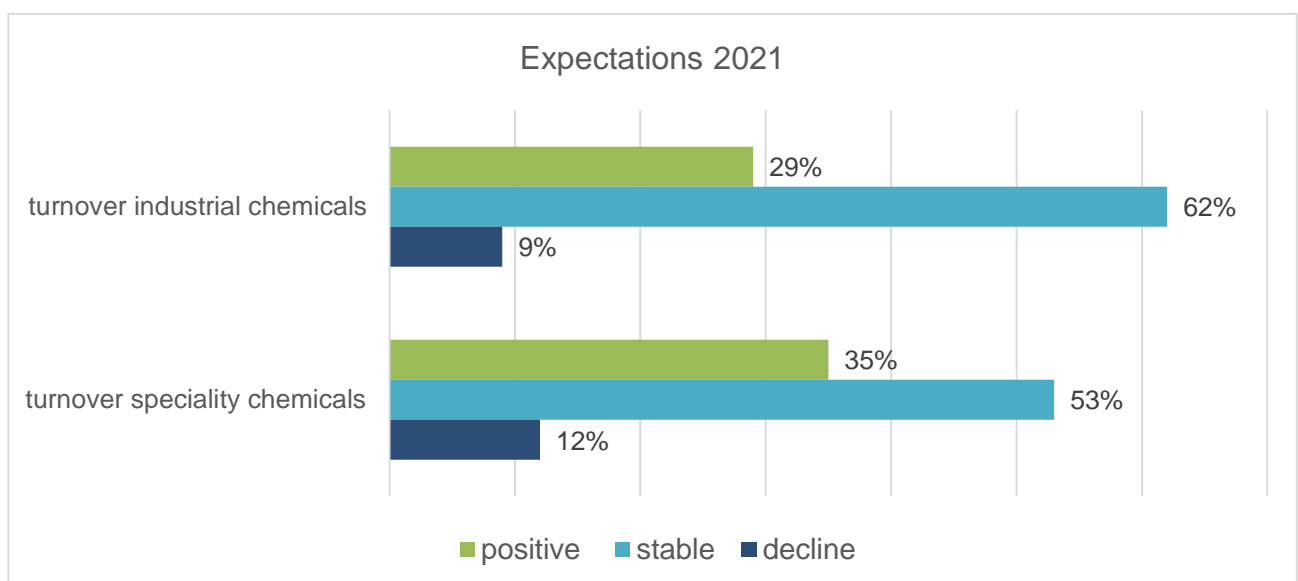
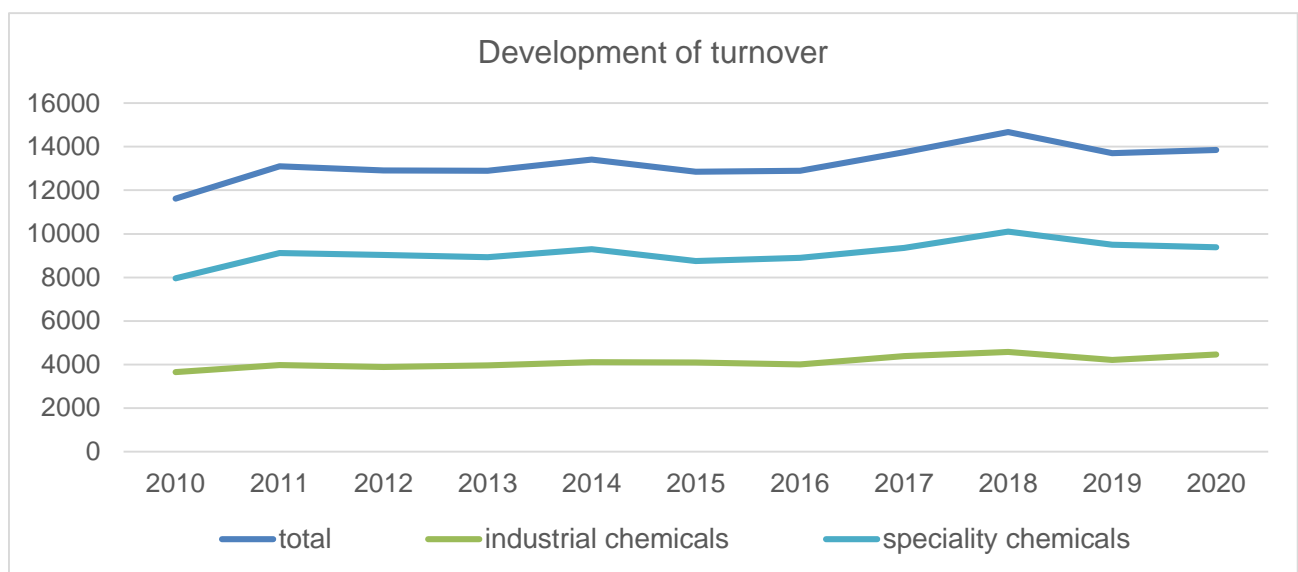
<b>turnover per annum in</b> <b>Mio. €</b>	<b>companies</b>
up to 2,5	23
2,5 - 5	8
5 – 12,5	13
12,5 - 25	13
25 - 50	16
50 - 200	23
> 200	8



\*) The information is based on the surveys on the contribution classification on the reference date. Missing feedback was estimated based on the previous year.

## Turnover

	<b>turnover</b> (in Mio. € without value added tax.)	<b>changes vs. 2019</b> (in %)
<b>Total turnover</b>	13.845	+ 1,0
Industrial chemicals	4.458	+ 5,9
Speciality chemicals	9.387	- 1,2

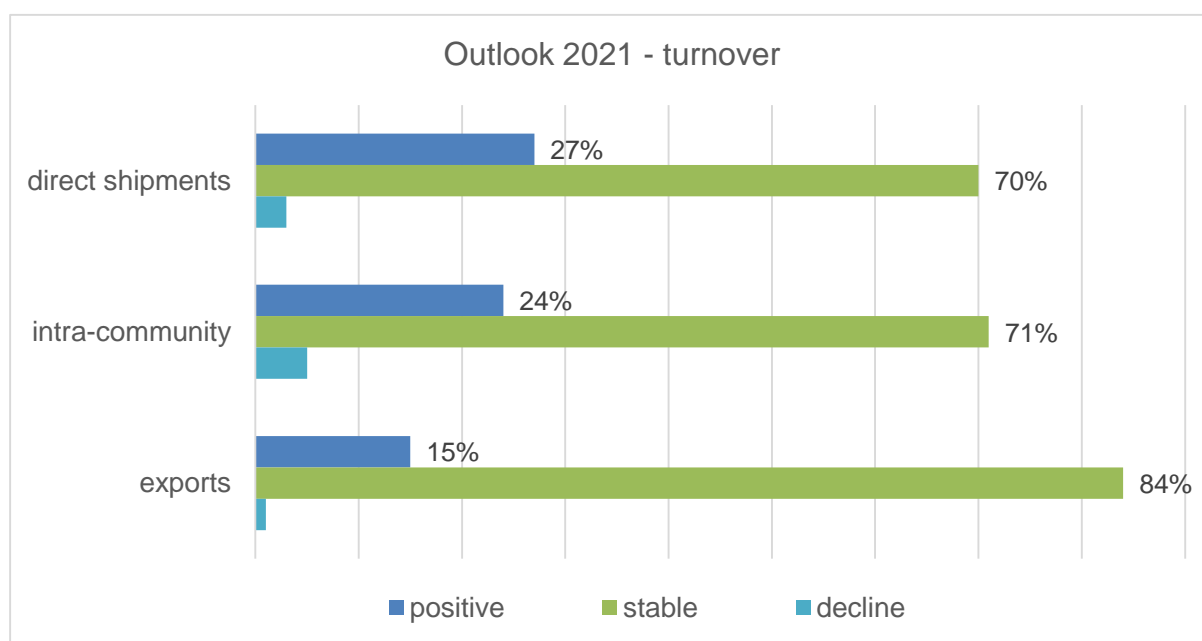


With regard to the expectations, the statements remain cautious and stable. A slight decrease compared to 2020 is expected for speciality chemicals.

## Domestic turnover

Turnover	2020 (in %) on average	Comparison previous year
Direct shipments	34	→
intra-Community supplies	21	→
Export Non-EU Countries	8	→

Compared to the previous year, the values have remained almost unchanged. Exports do not play a special role for most companies.



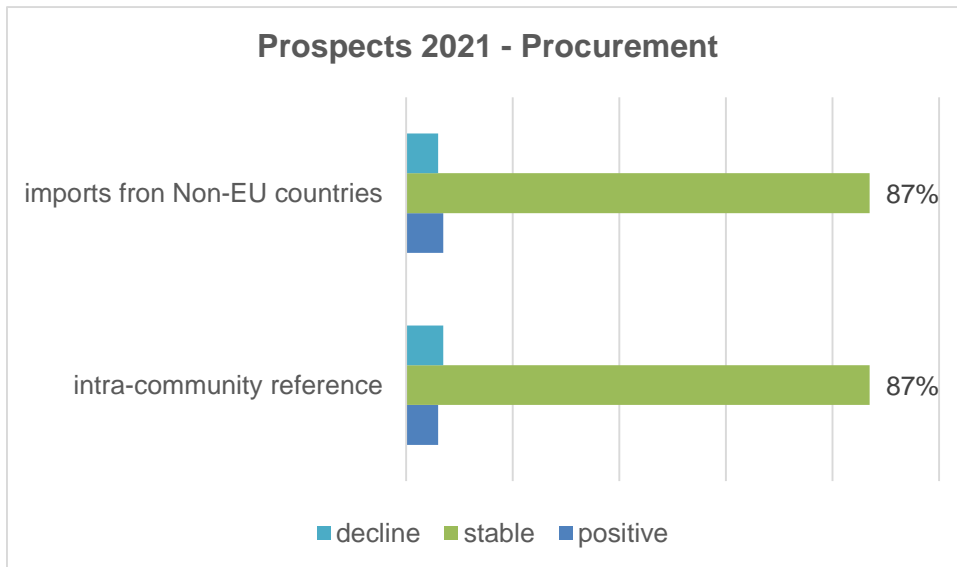
Stable to slightly positive outlook for direct shipments and intra-community sales in 2021.

## Procurement

### Purchased value of goods

	<b>2020</b>
<b>Purchasing – total (in 1.000 €)</b>	<b>14.447.000</b>
Intra-community reference	50 %
Imports from Non-EU countries	34 %

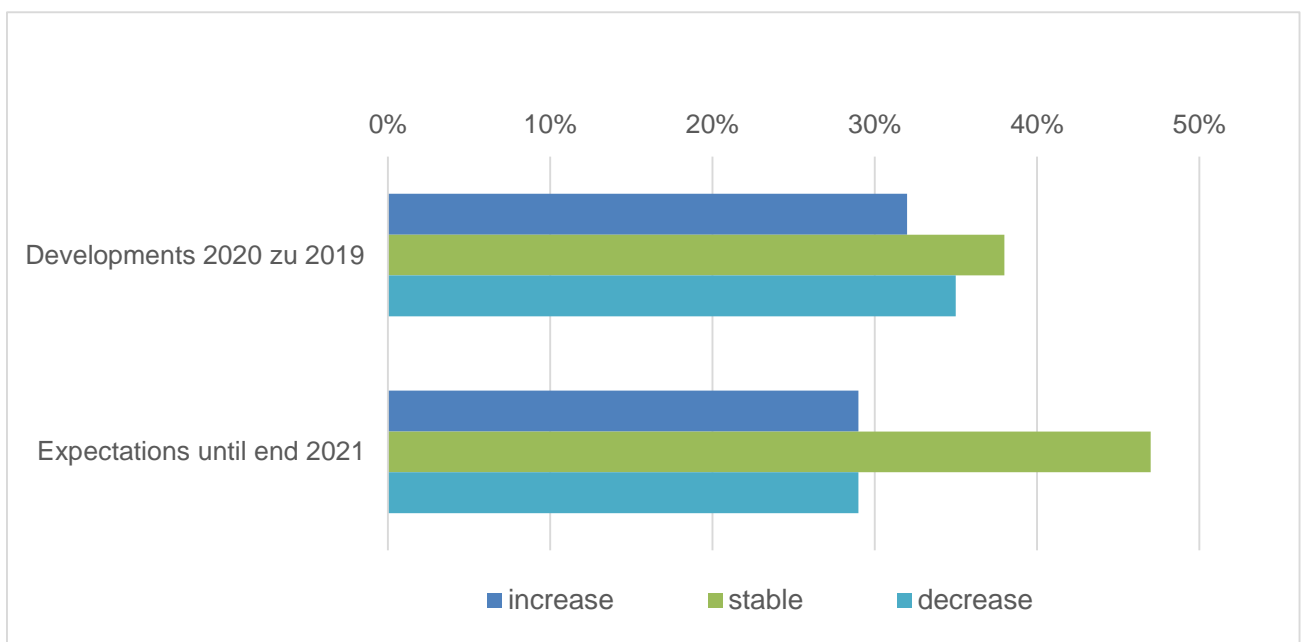
Average value based on the information from the companies



The majority of the companies that have responded assume a stable reference structure for 2021 as well. Only in very few cases do our members expect negative effects.

## Profit: Development in 2020 and Expectation for 2021

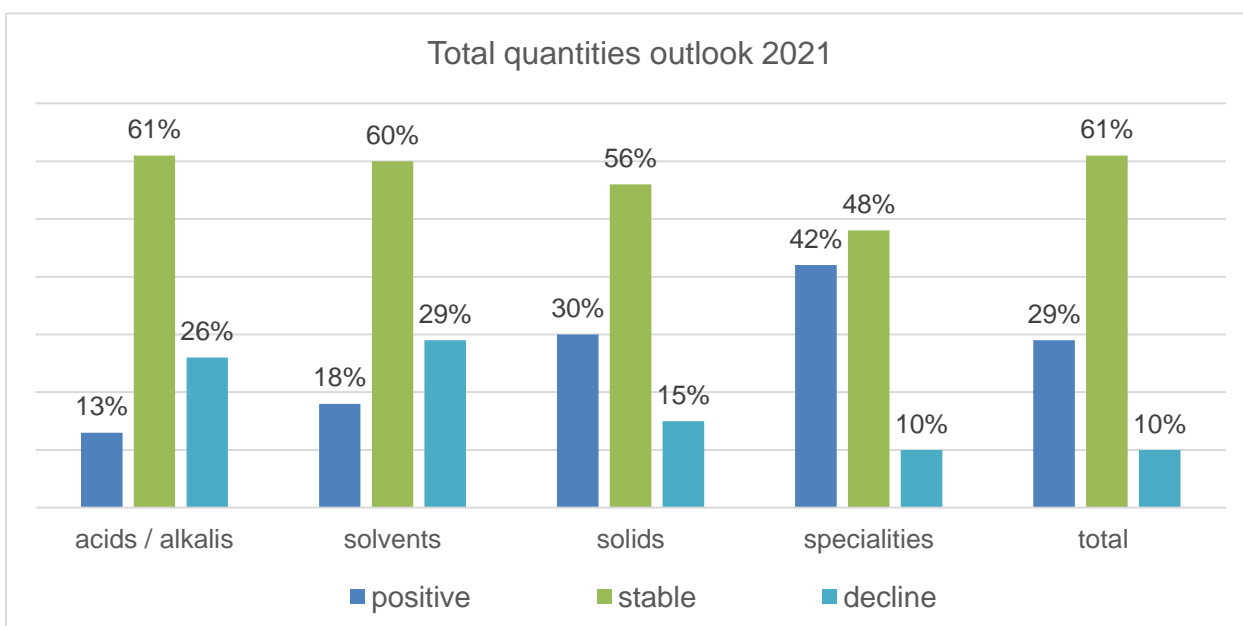
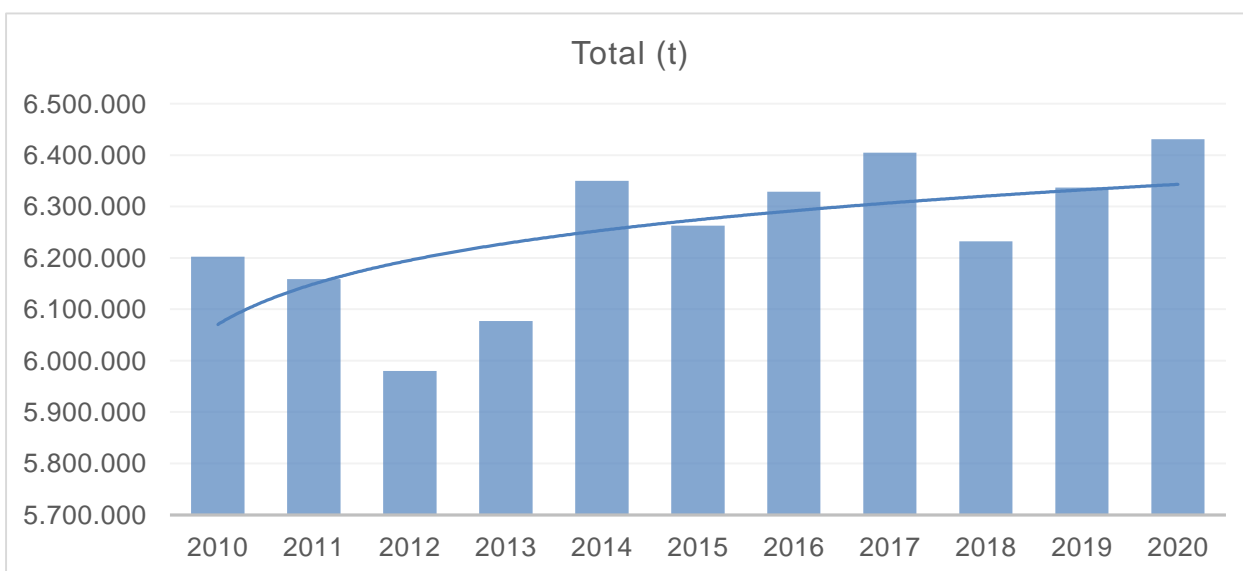
Stable expectations for 2021 – Industry shows cautious optimism.



## Total quantity in tons

	quantity (in tons)	changes (in %)
<b>Total quantity</b>	6.430.602	+ 1,5
• acids and alkalis	4.112.495	none
• solvents	826.035	- 6,2
• solids	730.110*	*)
• specialities	761.962*	*)

\*) New VCH-member with high quantities in the field of solids and specialities (according to own classification)



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## Investments

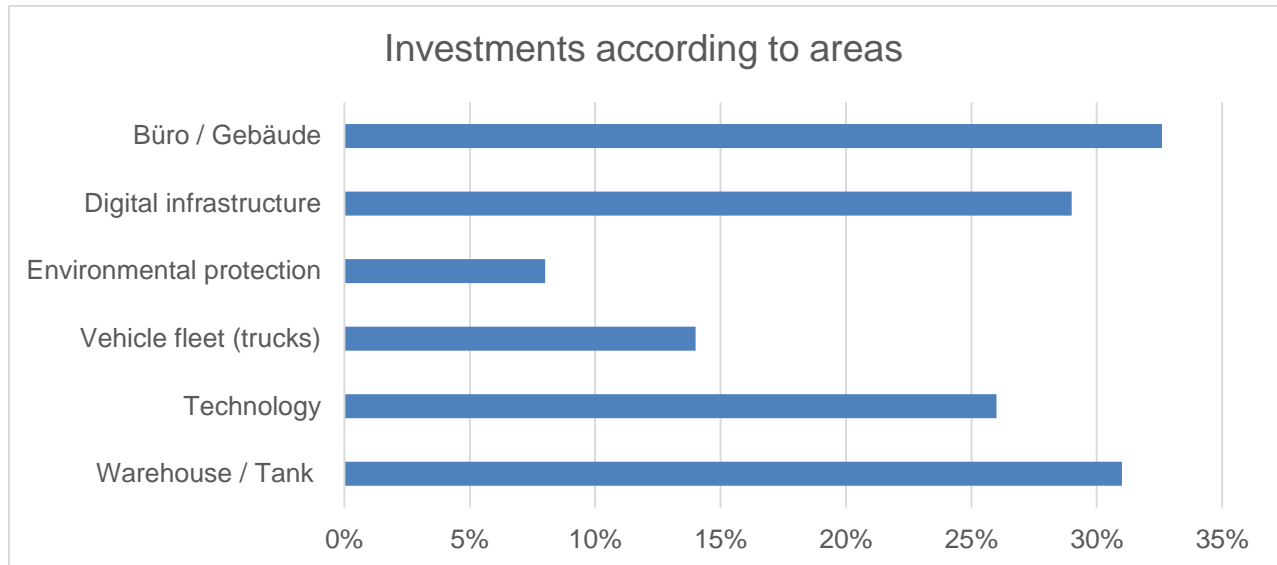
What percentage of turnover did your company invest in **2020**?

**Share of all investments in turnover: approx. 2.8%**

What percentage of turnover will your company invest in **2021**?

**Share of all investments in turnover: approx. 2.8%**

Conclusion: According to the available data, companies have invested about 1% less in comparison to last year's survey.



Companies invested significantly more than in the previous year in office equipment and digital infrastructure. This fact is probably due to the pandemic and its side effects (occupational health and safety and home office).

## Types of financing:

- Two-thirds of the companies' state that they finance investments **100% from profits or Depreciation.**
- In addition, some companies also use loans.
- in very few cases, asset restructuring is used for financing.
- No company has financed by increasing deposits.

## Storage and transport capacities

Storage and vehicles	volume	changes (%) vs. 2019
Storage for solids	398.000 m <sup>2</sup>	± 0
Storage for solvents (tanks & packaging)	193.000 m <sup>3</sup>	± 0
Storage for acids, alkalis, others (tanks & packaging,)	147.000 m <sup>3</sup>	+ 1,4

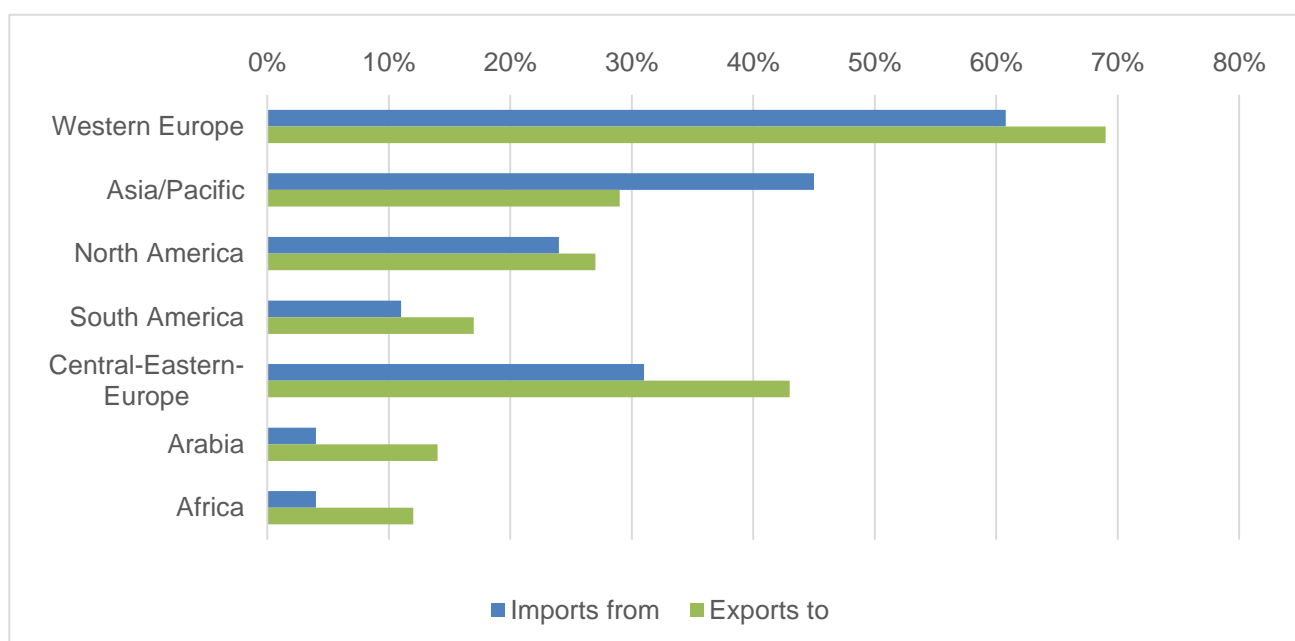
Outlook for 2021: Just under 5% say they want to expand storage capacity.

## Number of own trucks

Change from previous year: none

**Question:** Plan to increase the vehicle fleet: **95% do not plan to increase the fleet**

## Foreign trade – Overview according to regions

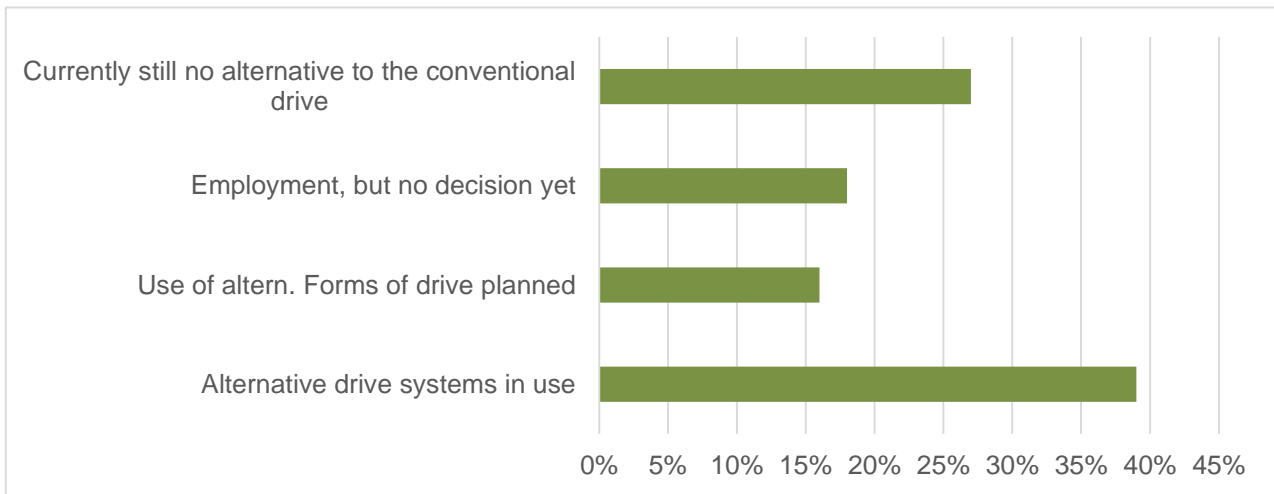




## ADDITIONAL QUESTIONS

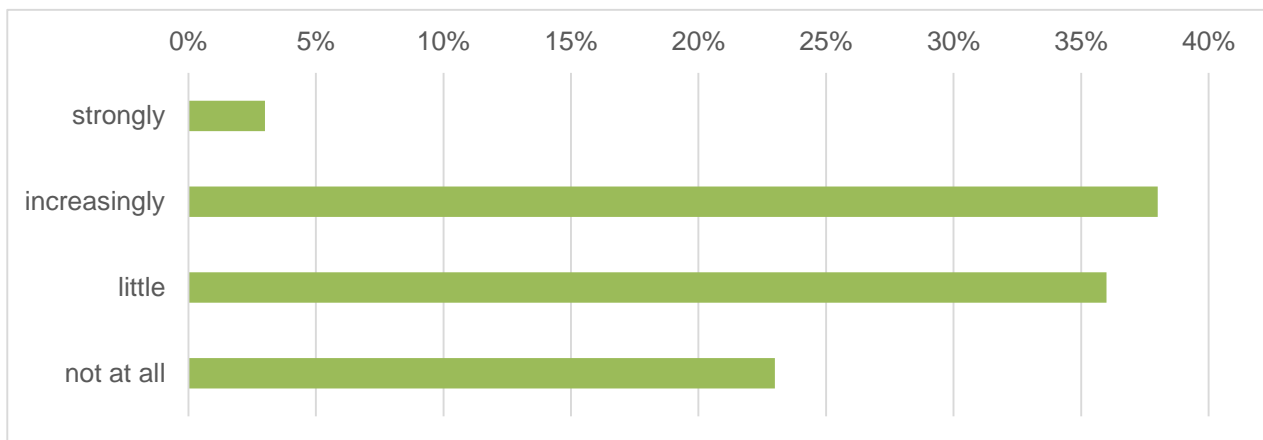
### Transport: E-Mobility

1. Have you already dealt with e-mobility or alternative forms?

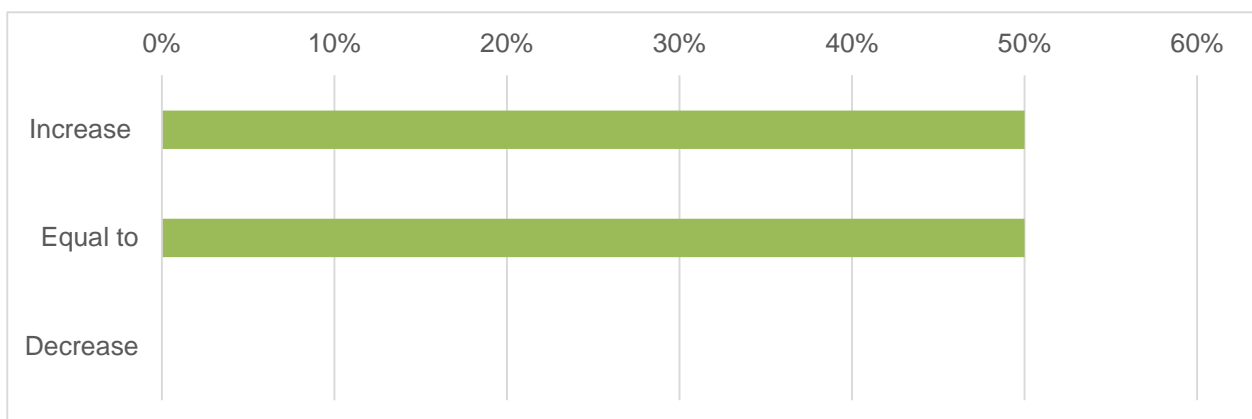


Compared to 2019, the companies have almost doubled the number of alternative forms, from approx. 20% to almost 40%. This is probably also related to the subventions for hybrid and electric vehicles.

2. To what extent is the increasing production of electrified vehicles already influencing product sales in the automotive industry and its suppliers?

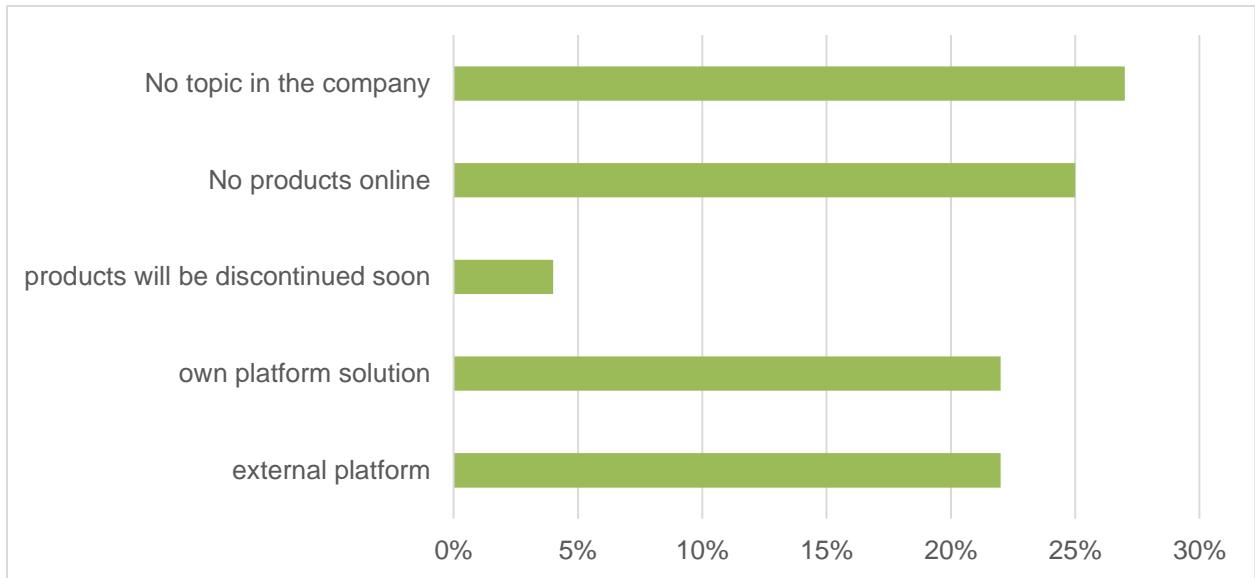


3. What impact do you expect by 2022?



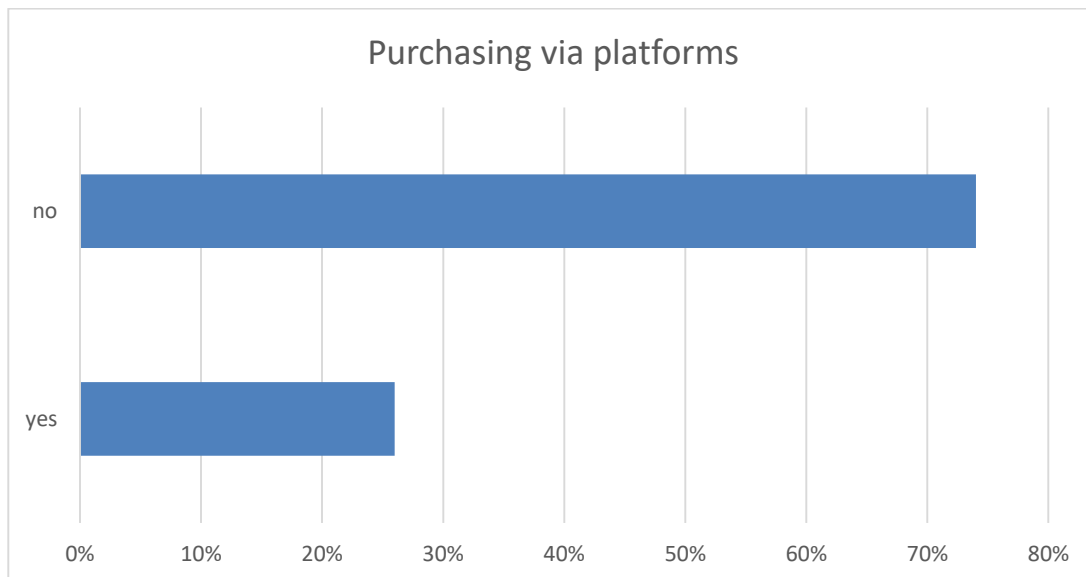
## Digitalisation

### 1. Are you involved in the distribution of chemicals via platforms?



In 2020, around 20% of the companies report to use their own platforms for the distribution of chemicals. Compared to 2019, this is about 15% more.

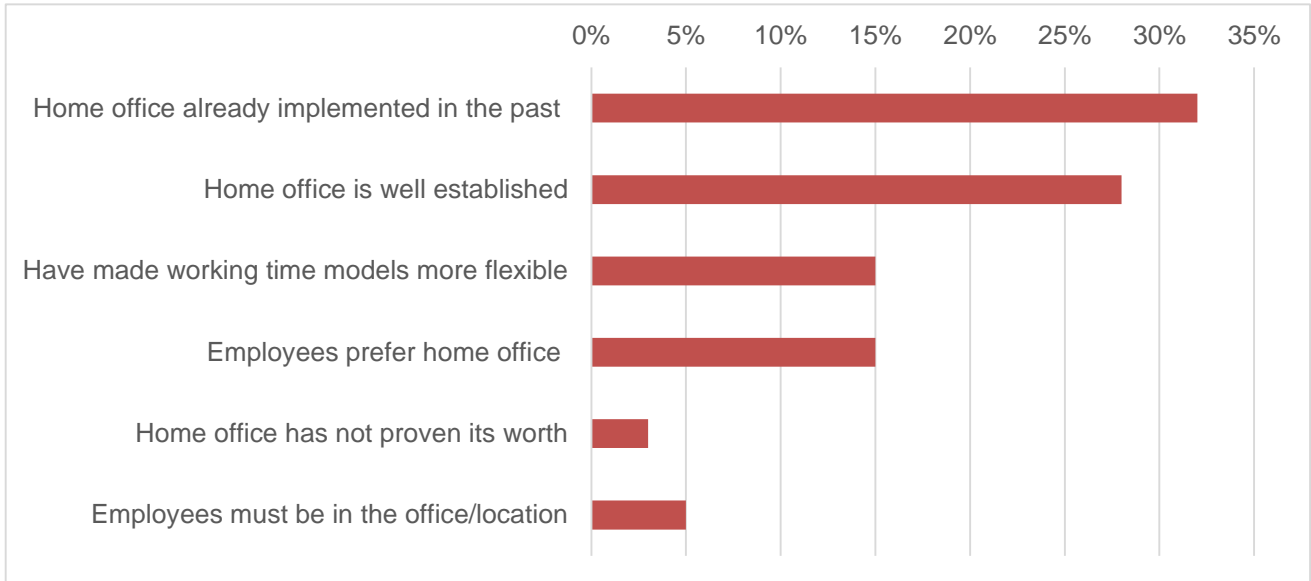
### 2. Do you also use platforms for purchasing products?



The statement that purchasing is not carried out via platforms has not changed significantly compared to the previous year.

## Home office / Mobile Working

Which statement applies to your company with regard to flexibility at the workplace or mobile working / home office? (Multiple answers possible)



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## Brexit

In which areas do you expect difficulties for your company? (Multiple answers possible)

