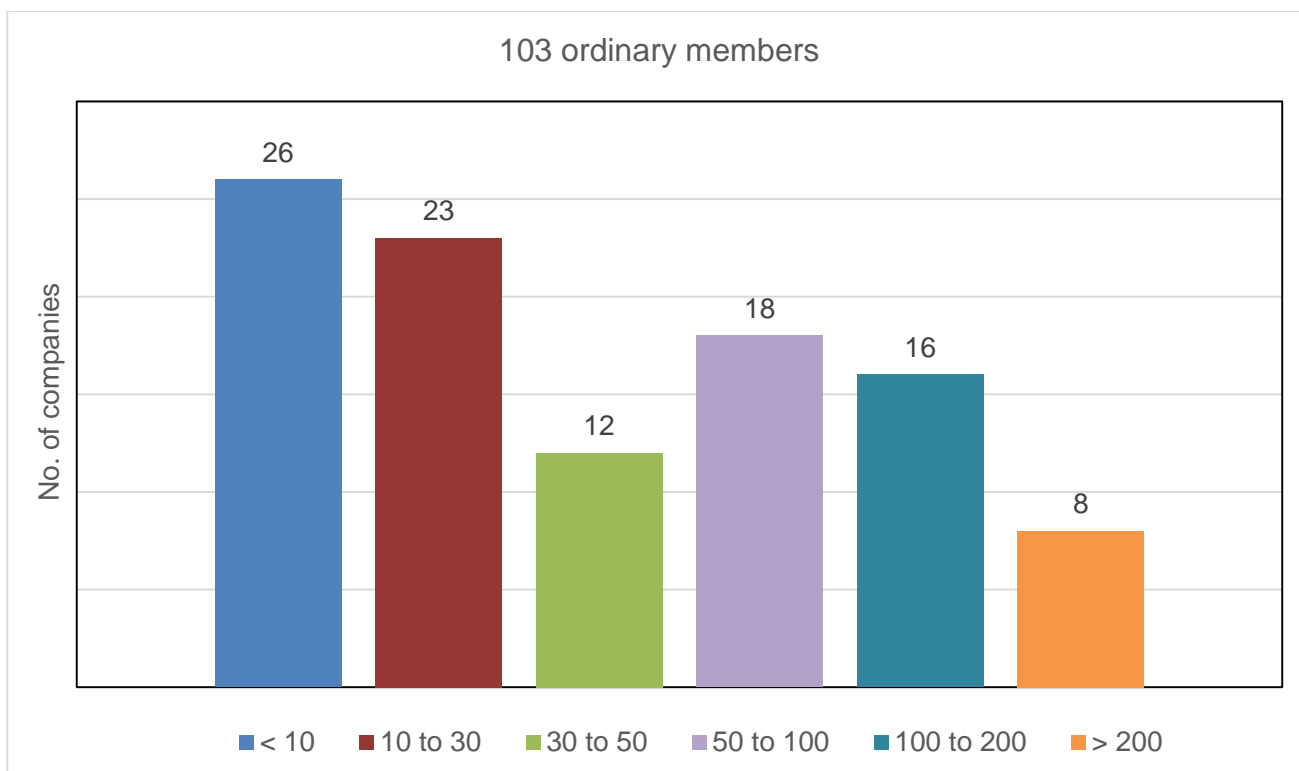


## THE CHEMICAL WHOLESALERS IN FIGURES - 2021

### Structure of member companies



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

### Structure

Members of Verband Chemiehandel (ordinary members 2021):	<b>103</b>
Number of locations:	<b>215</b>
Number of own warehouses:	<b>68</b>
Use of service providers for storage:	<b>48</b>

## Number of employees (in Germany)

	<b>Number</b>	<b>Changes vs. 2020</b> (in %)
<b>Employees total</b>	8.009	+ 1,1

*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.*

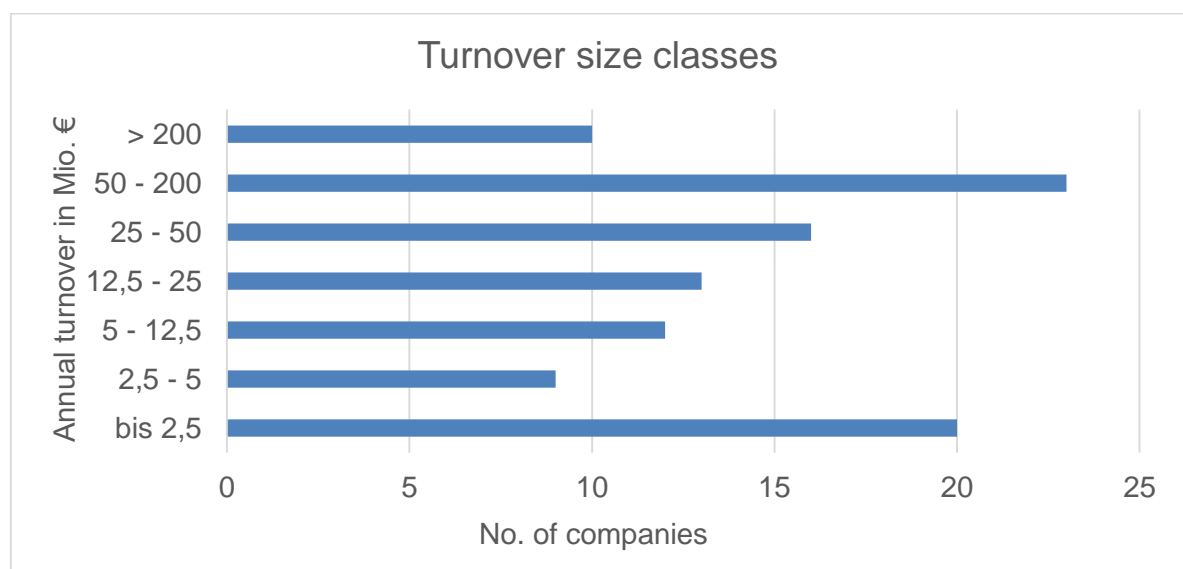
**Question:** Do you plan new recruitments for 2022?

**Answer:** Around 45% of companies are planning new hires for 2022

**Compared to 2021:** In 2021 the companies were more cautious, only a third of the companies expressed to recruit new staff.

## Turnover size classes\*

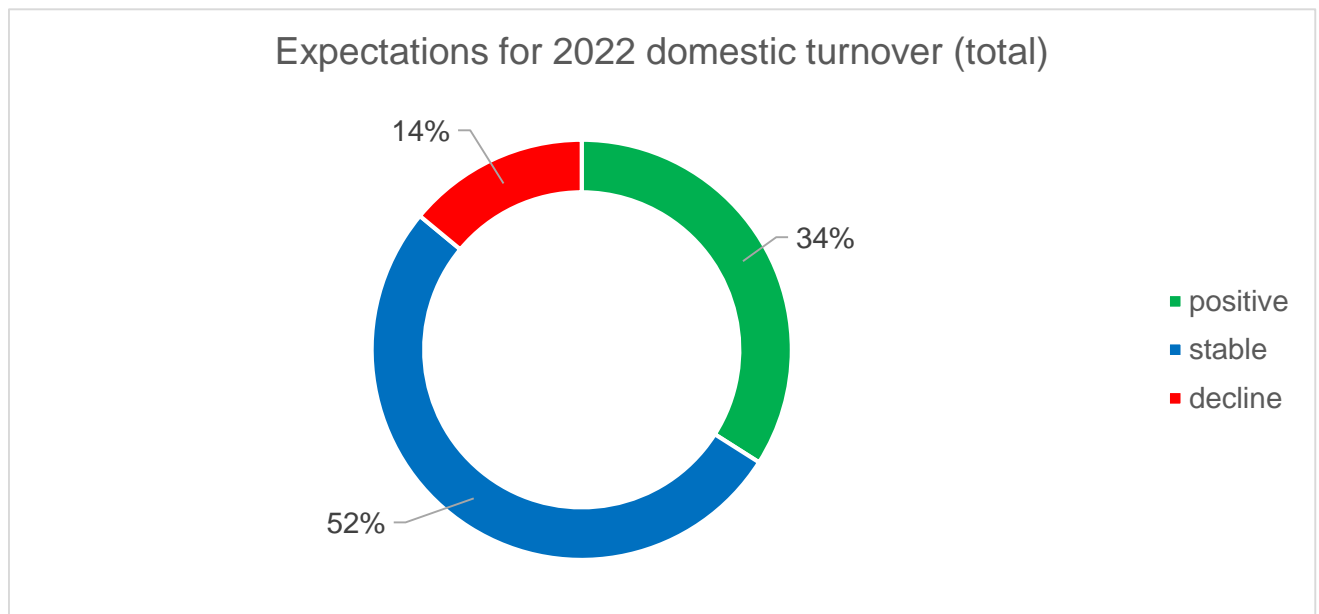
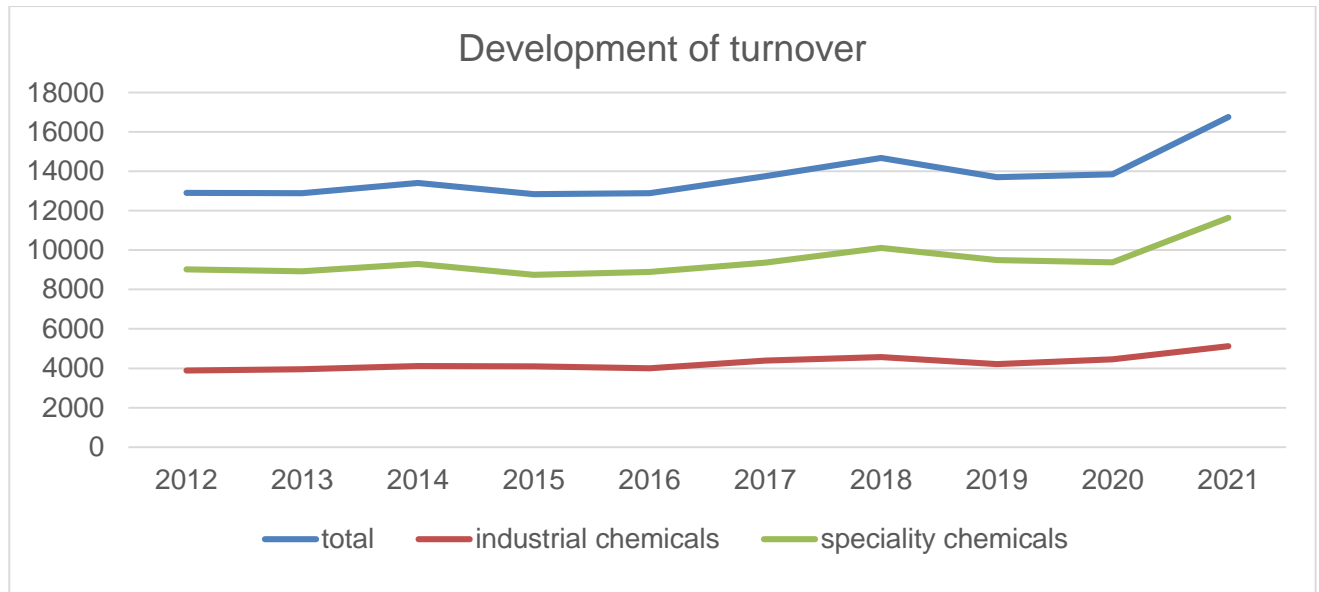
<b>Turnover per annum in</b> <b>Mio. €</b>	<b>companies</b>
Up to 2,5	20
2,5 - 5	9
5 – 12,5	12
12,5 - 25	13
25 - 50	16
50 - 200	23
> 200	10



\*) 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

	turnover (in Mio. € without value Added tax.)	changes vs. 2020 (in %)
<b>Total turnover</b>	16.765	+ 21
Industrial chemicals	5.126	+ 15
Speciality chemicals	11.639	+ 24

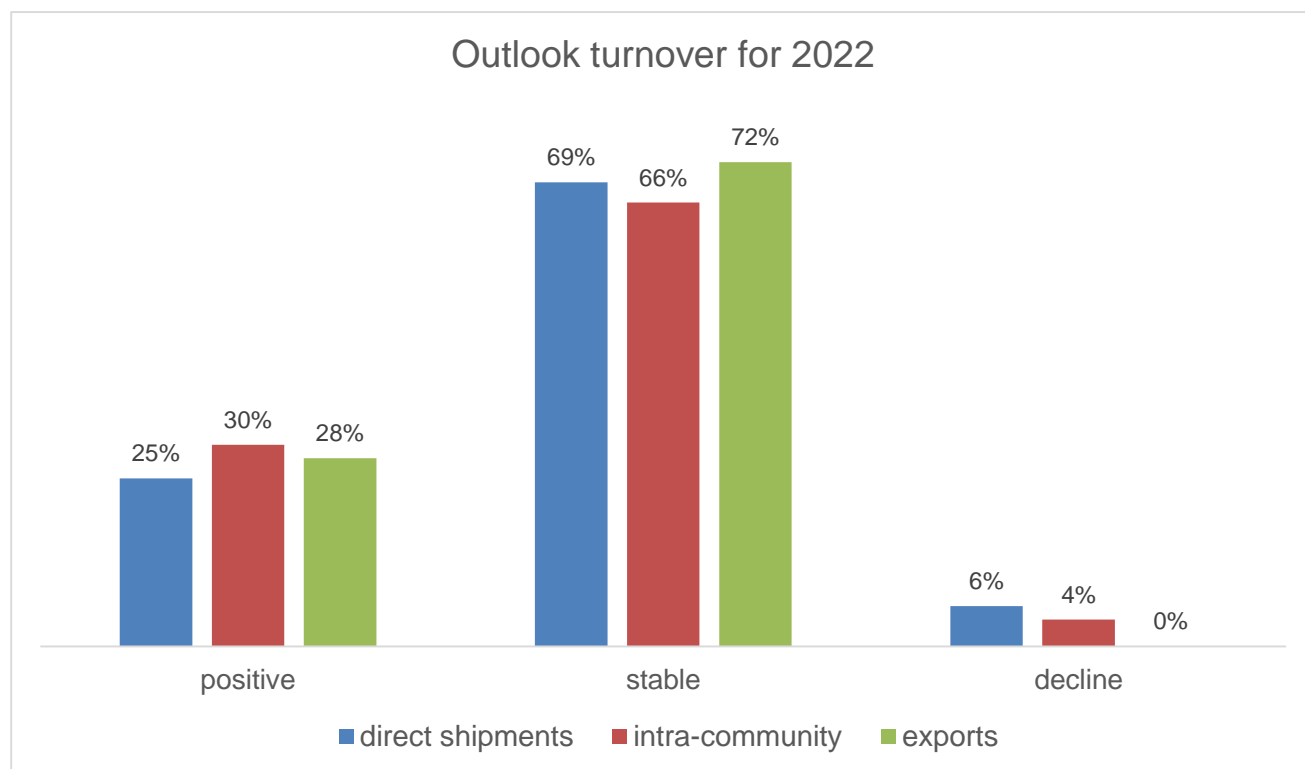


80% of the participating companies answered with a view to the expectations for 2022. The areas of industrial chemicals and specialty chemicals are predominantly rated as **stable to positive** in terms of expectations. Very few companies expect a decline.

## Domestic turnover

Turnover	2021 on average	Comparison previous year
Direct Shipments	33%	→ -1%
Intra-Community supplies	25%	→ +4%
Export Non-EU Countries	10%	→ +2%

The changes compared to the previous year are only minimal for the participating companies. Slight increase in intra-Community deliveries. Exports to non-EU countries are between 3 and 8% for the majority of companies. However, there are also companies that achieve between 20 and 45% of their sales with exports.



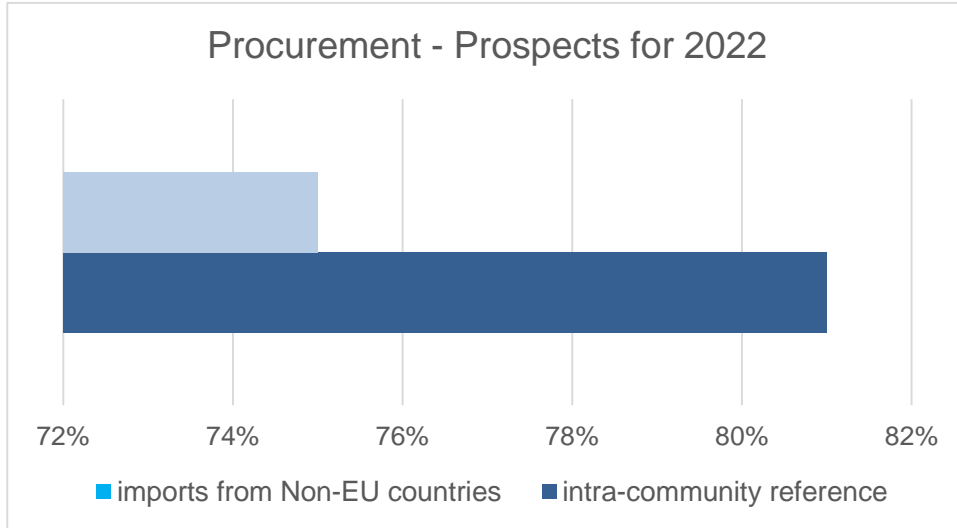
Stable to slightly positive outlook for direct shipments and intra-community sales in 2022. For exports outside the EU, companies are more optimistic than last year.

## Procurement

### Purchased value of goods

	<b>2021</b>
<b>Purchasing – total (in 1.000 €)</b>	<b>13.262.083</b>
Intra-community reference	68 %
Imports from Non-EU countries	35 %

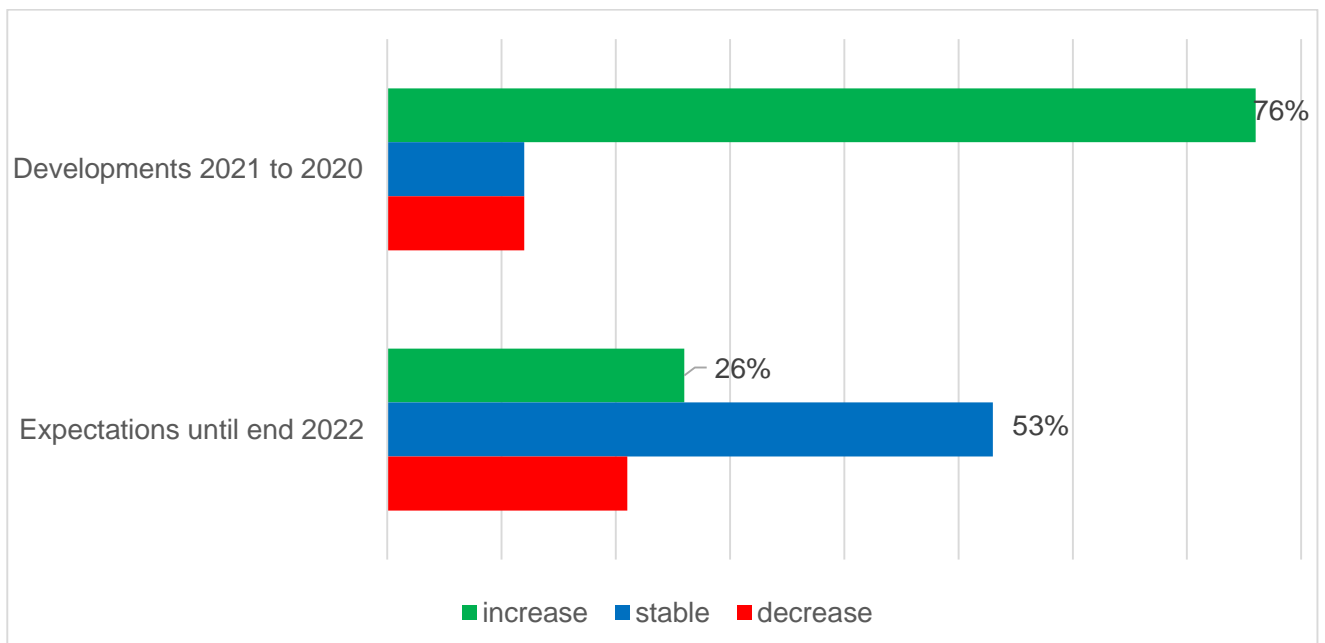
Average value based on the information from the companies. Feedback from 42 companies.



The majority of the companies that have responded assume a stable reference structure for 2022. Only in very few cases our members expect negative effects.

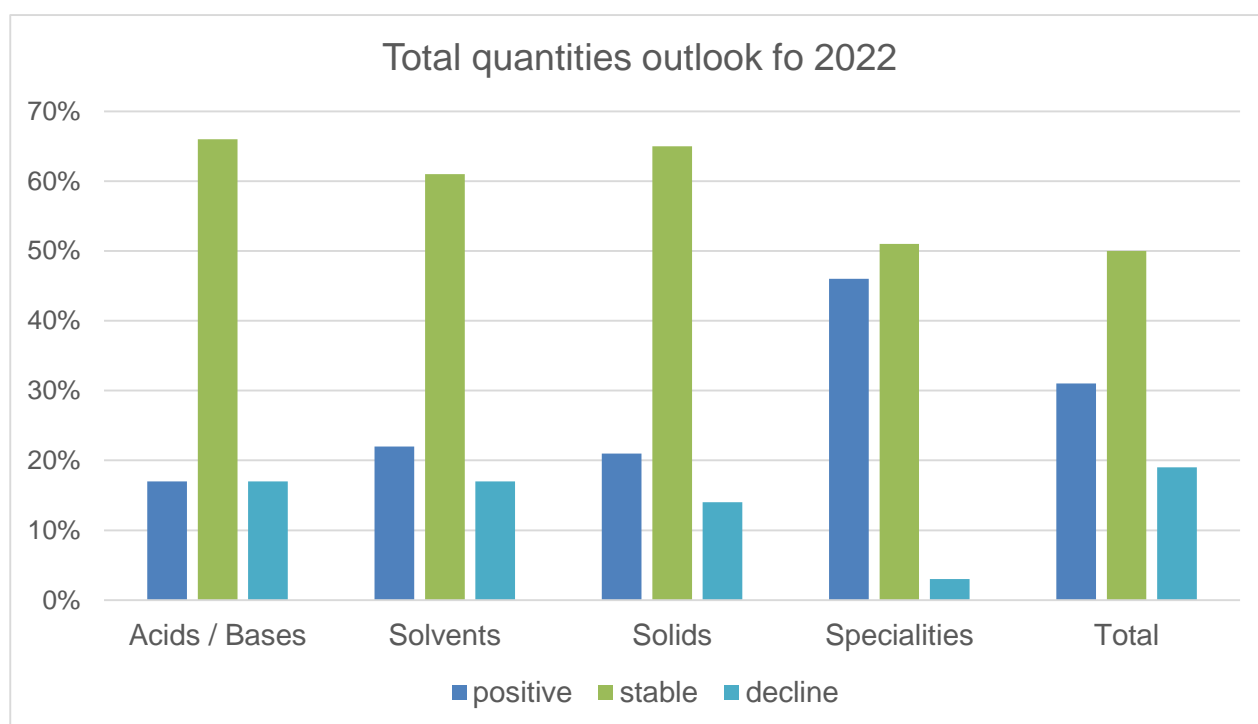
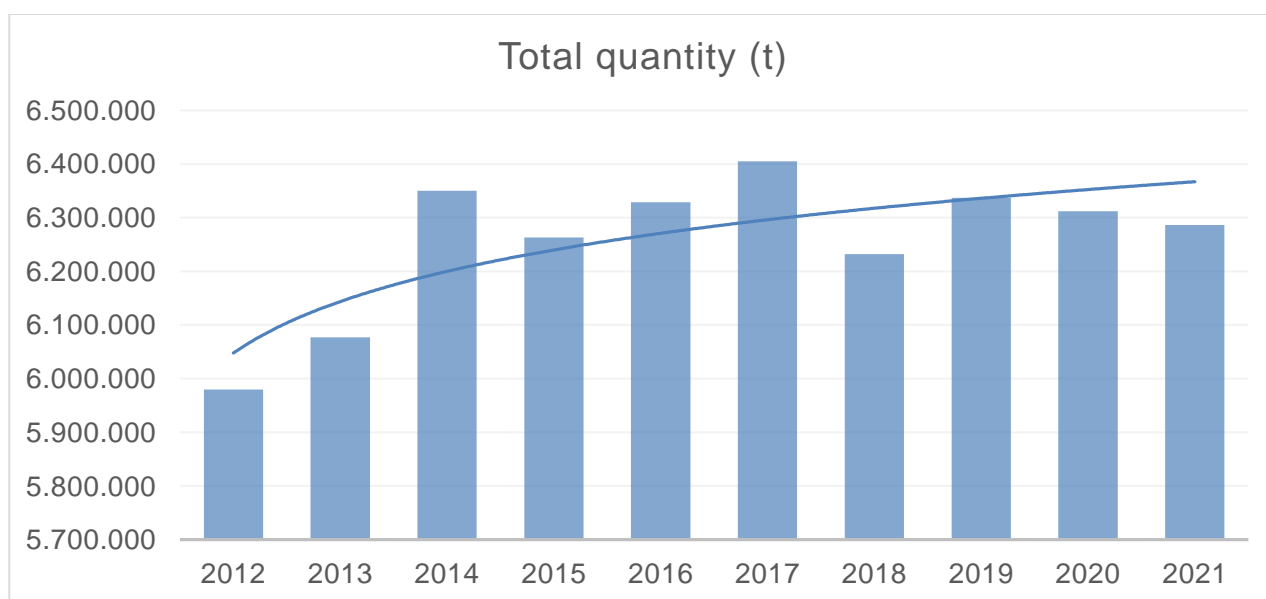
## Profit: Development in 2021 and Expectation for 2022

The development in 2021 can be rated as extremely positive. Stable expectations for 2022 – Industry shows cautious optimism.



## Total quantity in tons

	quantity (in tons)	Changes (in %)
<b>Total quantity</b>	6.286.510	- 0,4
• Acids and bases	4.005.328	- 2,6
• Solvents	867.336	+ 5,0
• Solids	772.319	+ 5,9
• Specialities	641.527	- 0,3



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## Investments

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

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**Share of all investments in turnover: approx. 4.1%**

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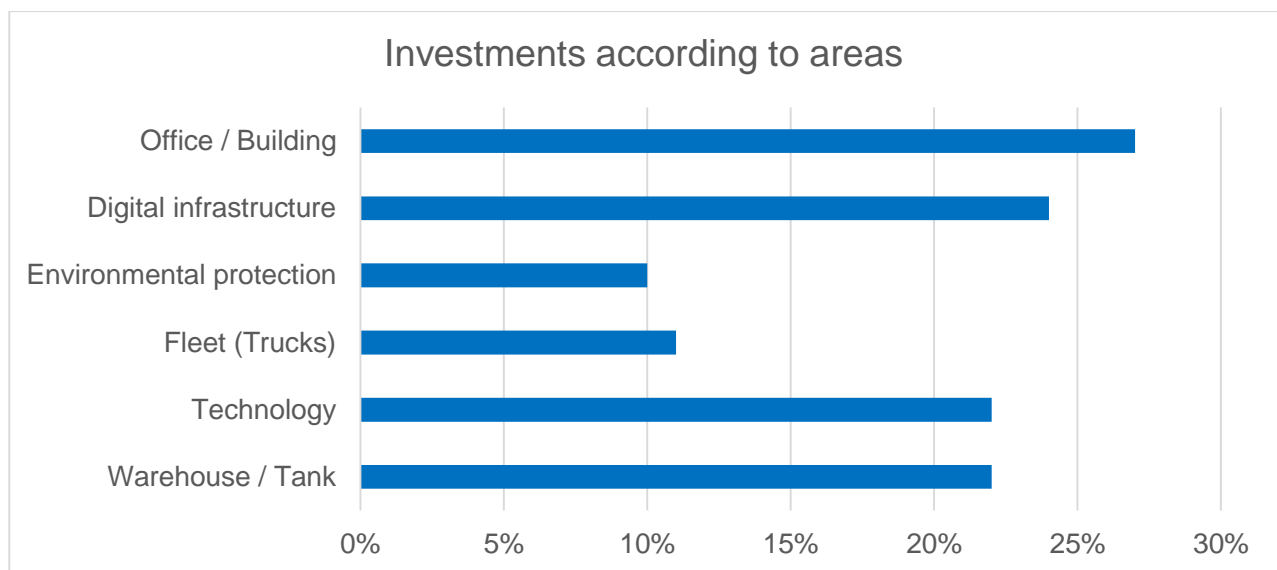
What percentage of turnover will your company invest in **2022**?

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

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According to the available data, companies have invested around **1.3% more** than in last year's survey. Basically, stockholding companies invest more of the turnover (3-8%) compared to non-stockkeeping companies (0.5-2%).



Investments in the office / building and digital infrastructure sectors remain slightly below the level of the previous year. A slight decline can also be noted for investments in the storage / tank area. The other three areas have risen the same to slightly. From the individual statements it can be deduced that companies sometimes focus heavily on individual areas. Companies have once again invested heavily in digital infrastructure and offices / buildings.

### Types of financing:

- Around 80 % of the companies state that they finance investments **100% from profits of Depreciation.**
  - Some companies use loans.
  - In very few cases, asset restructuring is used for financing.
  - No company has financed by increasing deposits.
-

## Storage and transport capacities

Storage capacities	volume	changes (%) vs. 2020
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, bases, others (tanks & packaging)	147.000 m <sup>3</sup>	± 0

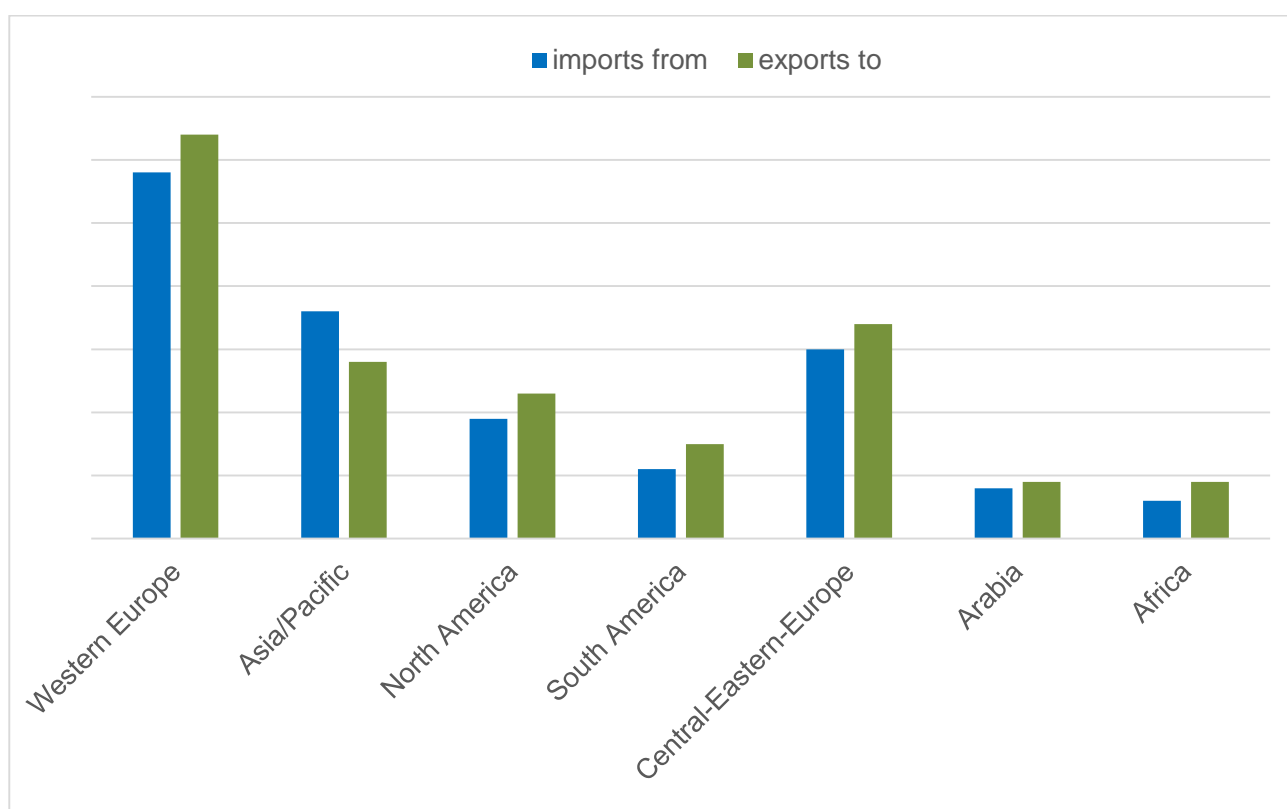
Outlook for 2022: A company is planning a new building in the area of refilling and production. Overall, no significant expansions in the warehouse area are planned.

## Number of own trucks: 360\*

Changes from previous year: none

**Question:** Plan to increase the vehicle fleet: **No, no increase.**

## Foreign trade – Overview according to regions



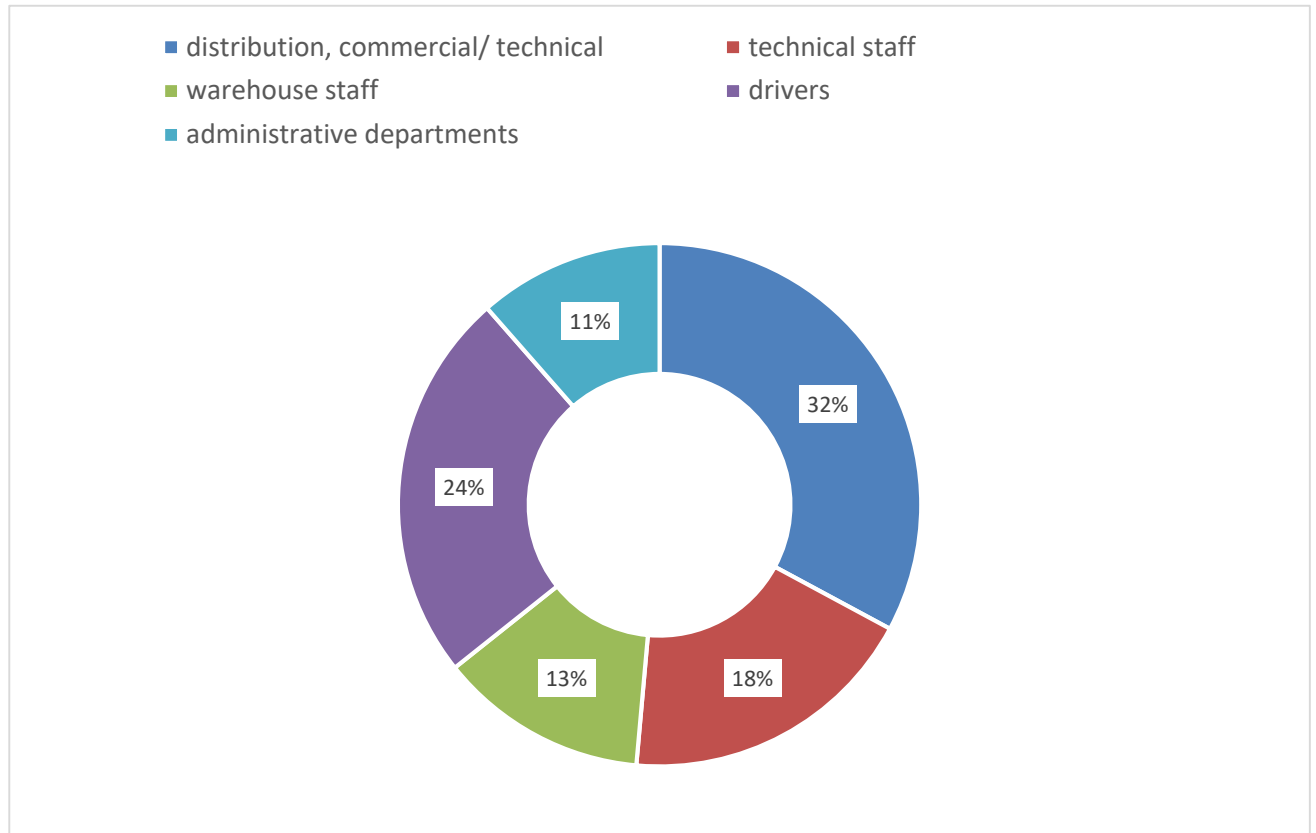
\* Data from VCH Responsible Care Survey 2020/2021



## ADDITIONAL QUESTIONS

### Skilled Workers

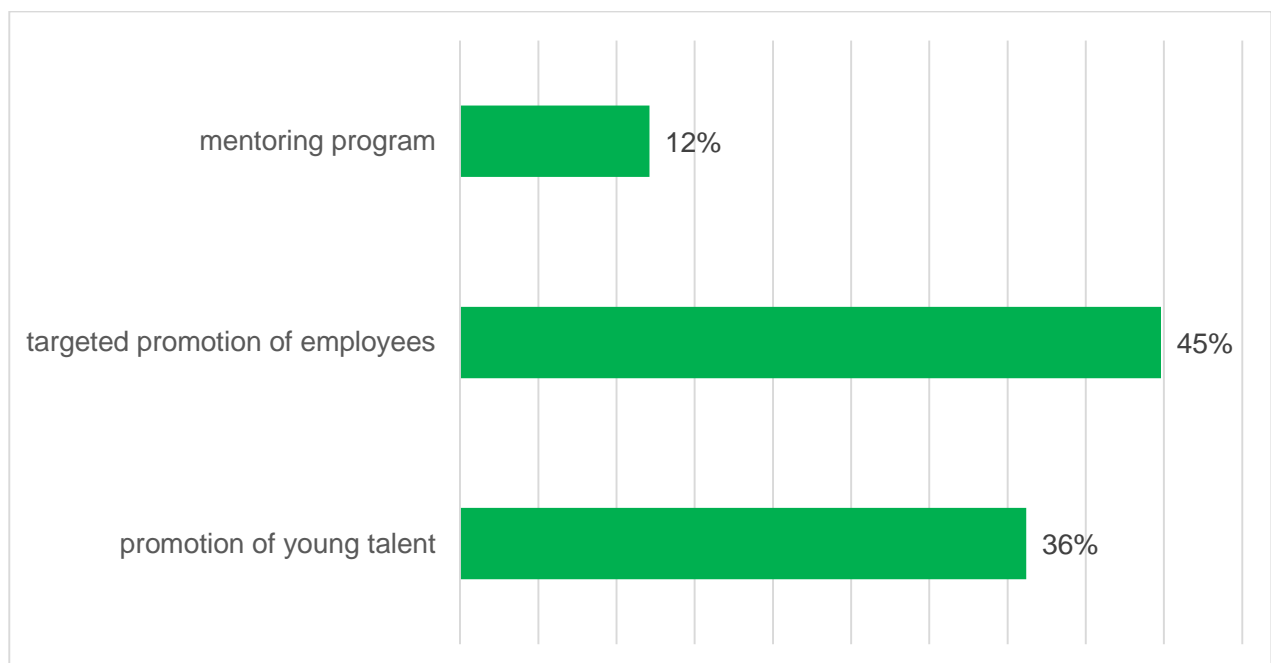
In which areas is the lack of skilled workers particularly noticeable? (Multiple answers possible)



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### Generation change / Promotion of young talent

How do you deal with that in your company? (Multiple answers possible)



## UN Sustainable Development Goals

How do you rate the importance for your company? We asked six goals related to the industry.

