



**NACD FOCUS**  
**BYER HIGHLIGHTS**  
**COMMITMENT TO**  
**SAFETY, SECURITY**  
**ICIS TOP 100 P32**

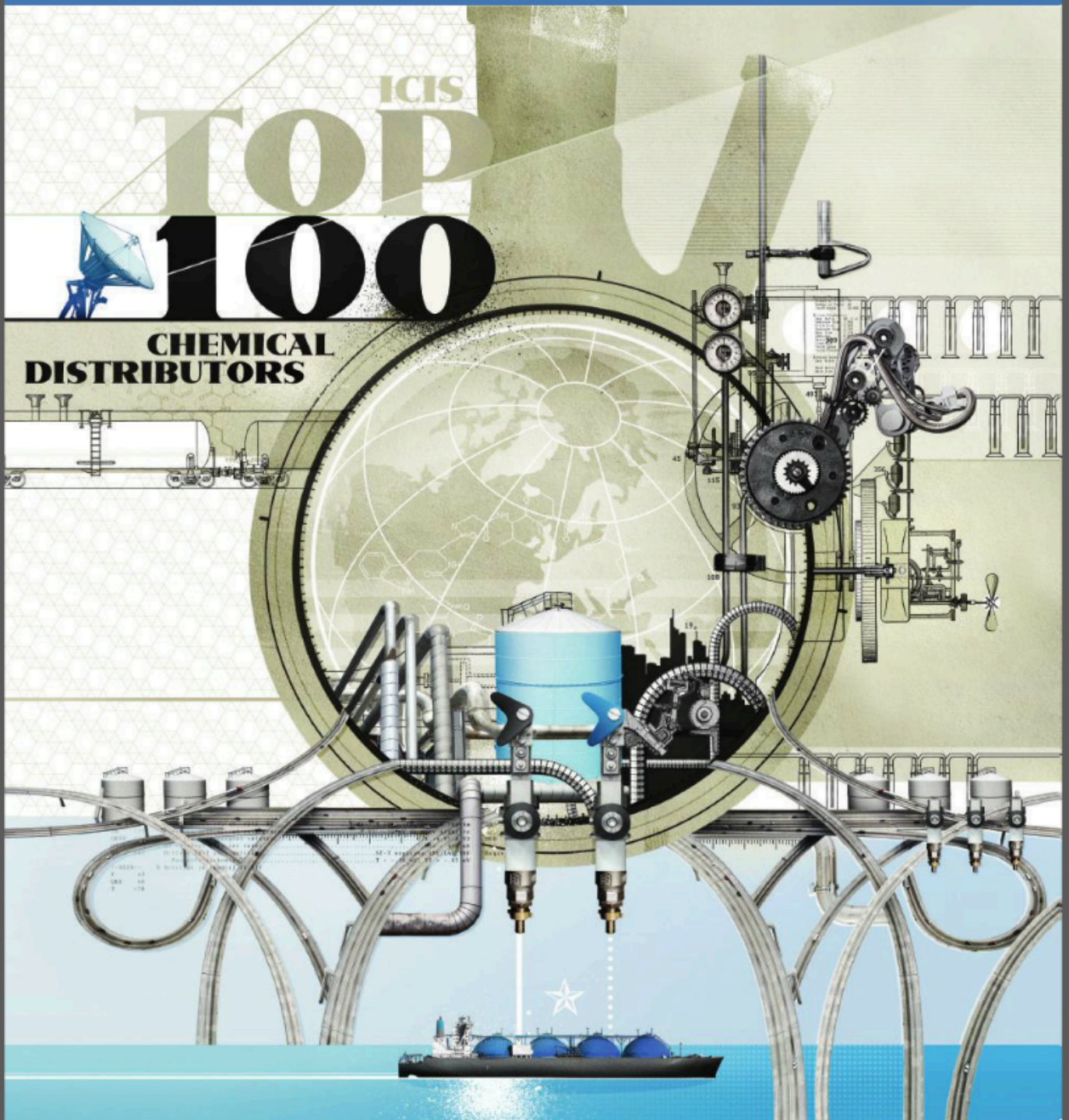
**M&A STRATEGY**  
Distributors aim to build  
leading market positions  
in an extraordinarily  
fragmented market **38**

**CHINA MARKET**  
Chemical distributors  
are finding it challenging  
to enter China. But the  
rewards could be big **42**

21-27 July 2014

# ICIS Chemical Business

**MAKING SENSE OF CHEMICAL PRICES**



# TOP 100 CHEMICAL DISTRIBUTORS

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## EUROPE CHEMICAL DISTRIBUTION LEADERS 2013

Company	Sales (\$m)*	Company	Sales (\$m)*
1 Brenntag	6,300	50 Giusto Faravelli	11.7
2 Helm	4,000**	51 Will & Co	115.6
3 Univar	2,327***	52 Zeus Quimica	114.6
4 IMCD Group	1,430	53 Arpadis	103.4
5 Stockmeier Chemie	1,300	54 Staub & Co – Silbermann	100.6
6 Barentz International	1,212	55 Petrochem Middle East	98.3
7 Azelis	1,200	56 PENPET Petrochemical Trading	95.1
8 Biesterfeld	1,200	57 Moeller Chemie	91
9 Solvadis	924.6	58 Proquibasa	90.3
10 Omya	921	59 Connect Chemicals	89.9
11 Caldic	780	60 MOGoil	89.2
12 Quimidroga	769	61 Alpha Wax	86.1
13 Overlack	631	62 Rahn Group	85***
14 TER GROUP	620	63 Aug, Hedinger	84.5
15 Jebsen & Jessen Group	551	64 BARCELONESA DE DROGAS Y P.Q.	80
16 CG Chemikalien	496	65 NovaSol Chemicals	79.5
17 Nordmann, Rassmann	455	66 Ilario Ormezzano	78
18 Indukern	420	67 Ricardo Molina	75.7
19 LEHVOSS GROUP	381	68 NEO Chemical	73.8
20 Arkem Kimya Sanayi Ve Ticaret	359	69 Nortex	71.9
21 ICC Chemical	336	70 AFCO	64.8
22 Eigenmann & Veronelli	317	71 Airedale Chemicals	64.7
23 Pluschem EEIG (European Economic Interest Group)	296	72 Behn Meyer	62.4
24 Campi y Jove	258	73 Manuchar	62.2
25 Tennants Distribution (and associated group distribution companies)	222	74 CellMark Chemicals (formerly Alcan International Network)	58.1
26 DKSH	216****	75 Andreas Jennow	54.5
27 Krahn Chemie	208	76 Bodo Moller Chemie	54
28 Bang & Bonsomer	196	77 MY-CHEM	47.9
29 Norkem Holdings	194.3	78 PHT International	47.2
30 HSH Chemie	194.2	79 Quimitecnica.com – Comercio e Industria Quimica	47
31 Comercial Química Masso	186	80 Melrob	45.7
32 ECEM European Chemical Marketing	181.5	81 National Chemical	45.1
33 VELOX	181.2	82 K&H Chemicals	44
34 Gamma Chimica	179	83 SAMECA Produtos Quimicos	38.3
35 Algol Chemicals	175	84 Wego Chemical & Mineral	38
36 Grolman Group	172	85 GB-Chemie	36.8
37 Prinova	161	86 KALE KIMYA GROUP	36.7
38 2M Holdings (Banner Chemicals, Surfachem)	158.4	87 Vendico Chemical	34.7
39 Haeffner	152.5	88 Shamrock Shipping & Trading	31.9
40 Unipex	150	89 Newport Industries	30
41 CSC Jaecklechemie	149.4	90 SINPRO	29
42 Atlantic Chemicals Trading	149	91 Tan International	28
43 Thommen-Furler	143.7	92 CHEMSERVICE	27
44 ELTON	137.9	93 Lumar	22.7
45 Harke Group	135	94 Comindex	20.5
46 Whyte Chemicals	132.6	95 Blachem	18.2
47 Bufa Chemikalien	131	96 Brockley Group	17.2
48 R2 Group	126.9	97 Charkt Chemical	6.8
49 Tillmanns	125.8	98 Chestech	6.5
		99 ChemSpec	5

NOTES: \*Sales are by region and may differ from the total sales figure in the overall Top 100 listing. This table also excludes companies that do not break out sales by geography. \*\*Includes chemical production. \*\*\*Europe, Middle East & Africa. \*\*\*\*ICIS estimate

### WWW.JEBSENSPECIALTYCHEMICALS.COM WWW.JEBSEN-JESSEN.DE

**General managers:** Michael Jebsen, Heinrich Jessen

**Products:** Coatings; resins; plastics; rubber; food additives; oil and gas chemicals; oil derivatives; bioethanol; pharmaceutical ingredients; personal care components; home care specialties; adhesives; water treatment specialties; mining components; agrochemicals

**Services:** R&D application laboratory services; import/export; regulatory affairs; warehousing; sourcing; factory audit; credit reports; local currency/financial services

**Assets:** 21 offices worldwide; 16 warehouses; nine laboratories

### 9 AZELIS 2013 SALES: €944.3M (\$1.301BN)

#### Luxembourg

WWW.AZELIS.COM

**CEO:** Hans-Joachim Muller

**Products:** Specialty chemicals; animal feed; agrochemicals; active pharmaceutical ingredients (APIs); cosmetic ingredients; fragrances; elastomers; fillers; excipients; fibres; fine chemicals; performance chemicals; base chemicals; flame retardants; food and nutritional ingredients; lubricants; phosphates; pigments; homecare ingredients; resins

**Services:** Application laboratories; drumming; blending; repacking; flexible pack sizes; technical support; GMP and clean room pharmaceutical facilities; intelligent, integrated supply chain; local stockholding; short lead times; market research; trends analysis; Reach Only Representative; sampling

**Assets:** 19 application laboratories; offices and access to warehouses (4 owned) in most European countries as well as in Australia, Canada, China, India, Indonesia, Malaysia, Japan and Singapore; smoke flavour production; food blending facilities

### 10 STOCKMEIER CHEMIE 2013 SALES: €940M (\$1.295BN)

#### Bielefeld, Germany

WWW.STOCKMEIER.DE

**CEO:** Peter Stockmeier

**Products:** Industrial chemicals (acids, caustic soda, solvents, solids); specialty chemicals for industrial and home care; coatings chemicals; construction chemicals; cleaning products; peracetic acid; polyurethane (PU) chemicals; flavours and spices; printing inks; textile auxiliaries; AdBlue diesel exhaust fluid; solvent recycling; water treatment chemicals

**Services:** Warehousing; blending; toll manufacture; specialised laboratories; logistics

**Assets:** More than 40 locations worldwide; 200 trucks; one deep-sea terminal

**our future are  
CHEMICALS**

**HIGHLIGHTS**

- Competence in Marketing
- Distribution of Commodities, Chemicals, Specialty Chemicals, Food & Pharma
- Own and rented Tank Terminals in Europe
- Production
- Logistics
- Industrial Partnerships

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**Assets:** 1,000 employees; office and warehouses in 13 countries; 38 warehouse locations; global production facilities in Malaysia, Thailand, Indonesia, Italy, US; laboratory facilities in Malaysia, Indonesia, Thailand and Vietnam

**16 MANUCHAR**  
**2013 SALES: €707.4M (\$974.8M)**

**Antwerp, Belgium**

**WWW.MANUCHAR.COM**

**CEO:** Philippe Huybrechts

**Products:** Detergents and home care chemicals; food and feed ingredients; paints and coatings; construction chemicals; mining and oil and gas chemicals; filtration and water treatment chemicals; textile and leather chemicals; glass and ceramics materials; agrochemicals; pulp and paper chemicals; personal care and cosmetics ingredients

**Services:** Sourcing; transport; stockholding; blending; diluting; repacking; quality control; deliveries; technical and operational customer service

**Assets:** Warehouses in emerging economies with a total of 250,000 sq metres and specialised equipment (pneumatic delivery, loading, discharging)

**17 SOLVADIS**  
**2013 SALES: \$951.6M**

**Frankfurt, Germany**

**WWW.SOLVADIS.COM**

**CEO:** Andreas Weimann

**Products:** Sulphur; sulphuric acid; methanol; petrochemicals; solvents; industrial chemicals; industrial minerals; pharmaceutical raw materials; synthetic lubricants; laboratory chemicals; styrenics; coatings; packaging materials; personal protective equipment

**Services:** Marketing; sourcing; storage; transport; logistics; packaging; supply chain management; processing; production; remanufacturing; regeneration

**Assets:** 11 tank farms; three storage facilities/warehouses; two production facilities

**Trading sales:** Less than 5%

**18 QUIMIDROGA**  
**2013 SALES: €629M (\$867M)**

**Barcelona, Spain**

**WWW.QUIMIDROGA.COM**

**General manager:** Vicente Munoz

**Products:** Solvents; monomers; glycols and intermediates; fine chemicals and specialties for food; feed additives; pharmaceutical ingredients; cosmetics ingredients; detergents; coatings; adhesives; paper chemicals; resins; plastics and elastomers

**Services:** Storage of liquid and packed products; blending; standard and tailor-made packaging; dissolutions

**Assets:** One logistics complex at the Port of Barcelona with capacity of 30,000 tonnes of packed products and 12,000 cubic metres of liquids in 155 tanks; two regional sites for liquids and packed solids; seven distribution centres and a fully equipped quality control laboratory

**Trading sales:** 20%

**19 DKSH**  
**2013 SALES: SWFR770.1 (\$864.8M)**

**Zurich, Switzerland**

**WWW.DKSH.COM**

**Co-Heads, Business Unit Performance**

**Materials:** Natale Capri and Thomas Sul

**Products:** Specialty chemicals for the graphics and electronics, coatings, polymers, adhesives, agrochemical, petrochemical, textile, fibre and plastic industries; active ingredients and excipients for pharmaceuticals, personal care and cosmetics raw materials; food and beverage ingredients, including food and nutritional supplements

**Services:** Formulation and application development; sourcing; R&D; market research; key client management; marketing; quality assurance; Reach and regulatory consulting; supplier audits; registrations;