

# Fecc Annual Congress 2019

**SPECIAL FEATURE: ICIS TOP 100 CHEMICAL DISTRIBUTORS**



**CHEMICAL DISTRIBUTION**

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**Marco Riquelme**  
Plant Supervisor,  
Brenntag Chile

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# COMMENTARY

**JOHN BAKER** LONDON  
john.baker@icis.com

**“Increasing adoption of e-commerce and digitalisation is making it easier for producers to sell directly to customers”**

**C**hemical distributors continue to perform well, despite a number of factors adversely affecting business, notably an uneven economic slowdown in Europe, uncertainty resulting from the UK’s withdrawal from the EU (Brexit) and trade disputes such as that between the US and China.

In part, the distribution sector continues to enjoy volume growth because chemical producers are still turning to distributors to help them reduce the complexity of getting their products to market. Distributors have become increasingly sophisticated in terms of technical service and support, and are managing to convince principals that they can add value to their business, not just costs.

And in part, chemical distribution has been kept competitive by the drive over the past two years or so to consolidate through merger and acquisition, with the top half dozen players acquiring multiple small and medium-sized business. In earlier years, the driver for M&A has been more around expanding into new geographies and new product areas.

But how long can these two trends continue? Increasing adoption of e-commerce and digitalisation is making it easier for producers to sell directly to customers, especially in the bulk and commodity end of the chemical sector. It is a development that distributors need to keep a watchful eye on and respond to by developing their own e-commerce capabilities.

In M&A, though, it would appear that the major players see plenty of scope for further deals, as the industry is still fragmented and regional, if not local, in character in many countries. The dominance of the global distributors is still a fair way off.

The Fecc Annual Congress in Sitges, Spain, on 12-14 June, takes a new approach to discussing these and other issues, such as talent recruitment and management, that will be key to the future success of the chemical distribution sector. This publication from ICIS, prepared in association with Fecc, is designed to provide context behind the issues and stimulate lively debate at the congress. I hope you find it useful.



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# A talent to succeed

Attracting and retaining talented people, adopting digitalisation technology and enhancing customer experience will be key contributors to business success

JOHN BAKER LONDON

Europe's chemical distributors come together in Sitges, Spain, for their annual congress in a largely positive business mood, despite some slowing down of the EU's major economies in the latter part of last year.

"The chemical distribution sector continues to grow faster than the chemical industry [in Europe]," points out Neville Prior, president of Fecc and chairman of UK-based Cor-

nelius Group. "Producers are still looking to take complexity out of their businesses and are recognising that a good distributor can add value, and not be just an added cost."

It is a trend that has been evident for many years, but Prior believes it still has some way to run. The proportion of chemicals trade put through distributors is still much lower in Europe than in the US and Asia, "and there is a lot of catching up to do."

Distributors, he adds, have been getting the message across that a good relationship

between principal and distributor can lead to benefits all round.

On top of this, he points out, there has been some general growth in the sector, as customers across Europe continue to develop new business and services, thus enabling distributors to grow sales organically. "Core business is still doing well," adds Prior.

That said, there has been some economic slowdown in Europe and indeed globally, with the US and China causing some concerns. The recent trade dispute between the US and China has had a limited impact so far, but the recent ramping up of duties from 10% to 25% could lead to greater disruption if current trade talks fail, says Prior.

Of potentially greater impact in China, he says, is the government's crackdown on health and safety enforcement and environmental pollution, which is leading to plant shut downs and even permanent closures of capacity. The loss of capacity and an associated drive to higher quality and costlier production should have a positive impact on global business, he believes.

The sector's leading player Brenntag recently reported a weaker performance in its Europe, Middle East and Africa (EMEA) region

in the first quarter, due mainly to lower demand. Brenntag noted that “EMEA saw a continuation of the trend from the second half of 2018 and a further downturn in the market environment in the first quarter of 2019. Demand was correspondingly lower, while at the same time higher costs were recorded in key areas such as transport.”

One country in Europe that has fared better has been the UK, where distributors have seen business boosted in the first quarter by stockbuilding in the manufacturing supply chain in anticipation of disruptions due to the UK leaving the EU.

The effect is expected to be transient, however, and the UK's Chemical Business Association's (CBA) latest Supply Chain Trends Survey, taken in late March/early April, shows more respondents expecting sales volumes and margins to worsen in the coming three months than those expecting improvements.

Business conditions aside, Prior believes that chemical distributors have several key issues to keep abreast of to ensure they remain competitive and sustainable. The increasing opportunities and threats from digitalisation is a topic of major interest. Also significant is the need to attract and retain talented people into the distribution sector and to manage Millennials (now in their early 20s to late 30s) in the workplace.

Digitalisation offers potential for greater transparency and efficiencies along the supply chain, but it could also impact the long-running trend (referred to above) of greater outsourcing by producers. “Digitalisation, and especially the development of e-commerce platforms, could offer producers a way of cutting out distributors by selling directly to customers,” warns Prior.

“If you look at commodity versus specialty chemicals, there could be a potential threat to the commodity sector. But in specialties, it could be an enhancer. People always need help with formulation, etc, and digital technology will provide another interface with the customer.”

**NEVILLE PRIOR**  
President, Fecc

### “Digital technology will provide another interface with the customer”

In terms of managing talent in the distribution sector, Prior points out that today younger employees come into work with very different expectations, which can create challenges for companies wanting to attract, motivate and retain good staff.

“Younger workers want to feel that they are doing more than just working for money,” he argues. “It's not just about profits, they want to feel the company's corporate social responsi-



**NEVILLE PRIOR**  
President, Fecc

### “There will be more information along the supply chain and distributors will have... this as one of their main challenges”

bility (CSR) performance is positive and that the company is a good corporate citizen. They are much more aware of the world about them and want to try and make a difference.”

In the light of these two important trends, he adds, distributors need to think hard about what they can do to differentiate themselves from their competitors. The need to deliver great service is now more a less a given, and the achievement of standards such as ISO and Responsible Care is not as differentiating as it once was.

Prior believes that customer experience will be a key area to focus on over the next 5-10 years. “Buying and selling will be a completely different experience in the future,” he

says. “There will be more information along the supply chain and distributors will have to adapt to this as one of their main challenges.”

Younger people in the supply chain, who have grown up with social media and digital devices and who have a different way of communicating, are bringing about changes. They also expect to use the internet more for research before buying and for ordering, and expect more extensive and timely information on order fulfillment.

The increasing drive towards a circular economy in Europe is another opportunity for distributors to differentiate themselves, adds Prior. “I see this as a kind of opportunity. For companies that can take it on board, it can give them a unique selling point.”

Distributors, he adds, “should see themselves as good citizens and chemicals policy, ocean waste, circular economy, etc, are all very crucial. The distribution sector should be looking at these a lot more positively.”

He points out that the bigger players in the sector are embracing the CSR agenda and signing up to initiatives like the Global Compact, but adds that other companies need to be seeing what they can do in this area.

In the medium term, concludes Prior, there is a need for a sharper focus on bringing in new talent, increasing workforce diversity and developing women for leadership roles, and a continuing commitment to face up to environmental issues and being a good corporate citizen.

In addition, he says, how companies embrace digitalisation and continue to add value to manufacturers and customers will be critical to their future success. ■

**BREXIT JOHN BAKER LONDON**

## UK EXIT FROM EU STILL SOURCE OF UNCERTAINTY

CHEMICAL PRODUCERS and distributors in the UK continue to seek clarity over the details of the UK's exit from the EU – so-called Brexit – especially on how the issue of the EU's Reach chemicals policy will be addressed.

Parliamentary stalemate over the terms of the Brexit deal with the EU has not been resolved by interparty talks in recent weeks. The UK was forced to take part in the recent EU parliamentary elections on 23 May, with no resolution in sight.

Foremost concern, says Fecc president Neville Prior, is how Reach will be implemented in the UK. Currently, the

government anticipates a UK Reach will be established, but, says Prior, preparations are not in place and “the government does not appreciate the difficulties, notably the cost and length of time to re-register substances.”

UK companies are already making their own adjustments. The European Chemicals Agency (ECHA) reports that they have transferred nearly 4,800 Reach registrations to EU27 entities since the beginning of this year.

Transfers are necessary, says the UK's Chemical Business Association (CBA) so UK companies can continue to have access to the single market

following a “No deal” Brexit.

If the UK does eventually leave the EU without a deal, the UK government has advised that :

■ UK businesses manufacturing a chemical (currently registered to EU Reach) will need to validate the existing registration with the UK Health and Safety Executive (HSE) within 120 days of the UK leaving the EU.

■ UK businesses importing a chemical substance from the EU will need to notify HSE within 180 days of the UK leaving.

■ UK businesses exporting chemicals to the EU will need to have an EU Reach registration in place once the UK leaves the EU. ■



# Forging a new path

Fecc has been undergoing many changes as it seeks to better understand and represent its members, including the appointment of Dorothee Arns as its new director general. The board and Fecc's new team are ready to take the association to the next level



Dorothee Arns became Fecc's director general at the start of June, bringing to the association her many years of experience gained at Cefic

**ELAINE BURRIDGE** LONDON

**C**hange is occurring at Fecc as the association forges ahead on a restructured and re-energised path. Perhaps the biggest and most recent change is the appointment of Dorothee Arns as the new director general from 3 June.

Arns joins from Cefic, where she was latterly executive director of Petrochemicals Europe.

Commenting on her appointment, Fecc's vice president Frank Schneider says: "With the expertise, the drive and the creativity Dorothee is bringing to Fecc, we are convinced that we can take the association to the level of excellence that we target for the benefit of all our members."

Looking forwards, Schneider says the association is now in "expansion and stabilising mode" after a period of uncertainty. "We want more members, a bigger and better Annual

Congress and to be more representative of the industry," he comments.

One of Schneider's key aims is for Fecc to promote more effectively the value of distribution to the chemical industry at large. "Reinforcing the value proposition of chemical distribution is one of Fecc's major tasks and objectives and we have not played this role as strongly as we should have in past years. We have to show the industry what we can deliver."

He points to the National Association of Chemical Distributors (NACD) in the US as a

**FRANK SCHNEIDER**  
Vice president, Fecc

**"We have to be prepared to bring young people in and give them a substantial voice"**



potential model for Fecc, pointing out that the Arlington, Virginia-based organisation not only invites distributors to be members but also chemical handlers.

Schneider is very keen to attract other stakeholders as Fecc members, particularly the digital community and definitely chemical producers, as well as logistics providers.

"That is the idea of where we would like to be," Schneider says. "We want to be a substantial institution that better links our members with the industry."

Although many chemical companies have adopted a strategic approach to distribution and are very aware of the benefits of a distributor network, Schneider says many major chemical producers still do not understand what distributors actually do.

For example, he says, if you look at customers in the pharmaceuticals or coatings market segments, they tend to look at chemical distributors as someone taking money away from

them and suppliers without adding any value. "They do not rate us the way they could," he states.

His view is echoed by Fecc co-opted board member, Gordon Hay, who says that distributors have not done a good enough job in the past to promote their value up and down the chain.

"There needs to be more communication, more understanding and more appreciation of the complex services provided by distributors. We are now looking for increased engagement with members, suppliers and customers so that we can drive future policies that better relate to all parties," he says.

**GORDON HAY**  
Co-opted board member, Fecc

**"There needs to be... more appreciation of the complex services provided by distributors"**



The Fecc board modified its strategy and value proposition last year. Its strategy for the period 2019 to 2022 sets out various objectives, which include promoting and enhancing the recognition of the chemical distribution industry as an added-value partner in the supply chain; representing the membership at a European level to ensure it gets a workable regulatory framework that does not strangle business; and promoting sustainable development, Responsible Care, and health, safety, security and environmental (HSSE) compliance.

In addition, Hay says, Fecc wants to support growing demand from customers in the life sciences and specialty chemicals market segments, along with supporting and helping members to manage their digital transformation.

Fecc is undergoing a slow rebranding as part of its aim to clarify its value proposition to members. This value proposition has four key points. These are: (1) access to expertise through Fecc's technical experts and committees; (2) advocacy and lobbying; (3) networking, where distributors can work with each other through the association and share best practices; and, (4) promoting chemical distribution – namely raising its image, reputation and visibility within the larger industry.

Along with upping Fecc's profile, the board is reviewing the association's existing committee structure. "We need a fitness check to see if any new committees are needed and possibly refresh the existing ones," Hay says.

Currently, there are seven committees: Responsible Care, SQAS Distributor/European Single Assessment Document (ESAD), Logistics, Precursors, Life Sciences, Safety,

Health and Environment (SHE), and International Trade.

Meanwhile, Hay has been conducting a survey ahead of the Fecc's June Annual Congress to gather opinions from the association's membership and stakeholders on a variety of topics, including Fecc's performance, its value proposition and industry issues.

"We need to engage if we are to be serious about shaping the organisation to one the membership wants," he says. Results of the poll were discussed by the board ahead of the Annual Congress.

In need of new energy and new ideas, Hay and others were keen to revamp the Congress this year and change to a new format. Moving away from the traditional sole presenter slots, the event now comprises two panel sessions where speakers from all parts of the supply chain will share and debate their vision of the future.

The panels, which will be moderated by a professional and external person, will be followed by a Q&A session, where delegates will be actively encouraged to take part.

For the first time too this year, Fecc has run a competition for young talent, namely people under 35 years. The association has invited the top two candidates to the Congress and is covering their expenses. The initiative is in recognition of a deep need for the industry to listen and actively encourage a younger generation into chemical distribution.

At a time when many students are eschewing the chemical industry and instead choosing high-tech sectors to pursue their careers, distributors need to up their game if they are to attract young talent.

#### NEED TO ENCOURAGE WOMEN

Hand in hand with attracting the younger generation is the pressing need to encourage and support more women in the industry, particularly at executive level, an area where chemical distribution has not done well, to say the least. The lack of women in top roles at many major distributors is a major failing and Hay says the panel will discuss why the sector is so bad at recruiting and promoting female leaders.

As Schneider points out, the chemical distribution sector, and indeed the chemical industry overall, is "grey, male and pale." He states that the industry, and Fecc, must be prepared to rejuvenate and refresh themselves to encourage a younger generation onboard, along with improving efforts with regard to diversity.

One area where this needs to happen is the transformation to digital platforms, says Schneider. Very often, corporate task forces on digitalisation are headed by the older generation because senior executives want to be in charge. "If we do not allow a different generation of younger people, not only as the execu-

tors but also as the brains behind the digital transformation, we will lose out as an industry. We have to be prepared to bring young people in and give them a substantial voice."

He warns that the rise of Amazon from its origins as just an online bookseller to eventually rival giant US retailer Walmart could be replicated in chemical distribution if the sector is not disruptive in its approach. "Digital platforms are the third dimension now and we must respect that and use them to become better."

Along with revamping the Congress, Fecc, under the leadership of interim director general Cathy Demeestere, has renewed and upgraded its IT systems to improve activity and communication between staff, as well as recruiting a new technical team, among other key roles.

"We have some exciting times ahead," says Fecc treasurer Peter Newport. "We are growing people in their new roles to become an effective resource for members and to strengthen Fecc's advocacy through their technical expertise. We want to have a proactive face at a European level for our members."

**PETER NEWPORT**  
Treasurer, Fecc

**"We [distributors] need an effective body and a cohesive voice at a European level going forwards"**



The association is currently working on the ability to give forward visibility to members on what is happening in Europe, for instance updates on regulations. Newport says Fecc would like to enable the flow of information and raw data to its members so they can plan ahead to meet changing business conditions.

With responsibility for Fecc's fiscal health, Newport says the association remains financially stable and has significant reserves that will enable it to deliver its various programmes and investments to benefit members. He comments: "Given that we have had a period of change, we are asking members to stick with us and see what the new team can deliver. We [distributors] need an effective body and a cohesive voice at a European level going forwards."

Schneider too urges members to give the Fecc team a "new credibility". "We want to grow together with our members and create a new Fecc. Fecc should be the spearhead of its membership and we want to be stronger and more resilient in the future, and better support and understand what our members want from us and to execute that. Cooperation is absolutely key for our future, he says." ■



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# Positive outlook despite headwinds

Fecc members remain staunchly upbeat about their growth prospects for 2019, despite a downturn in Europe and geopolitical turmoil. M&A continues to drive consolidation

ELAINE BURRIDGE LONDON

**T**his year has not had the most auspicious start. The downturn that started in the second half of 2018 has continued into 2019, as economic and manufacturing activity in the EU has slowed further as a consequence of heightened uncertainty from several factors that include trade tensions, political unrest and, of course, the seemingly never-ending saga of Brexit.

In its April monthly Chemical Trends summary, industry association Cefic says EU chemicals production was down 0.7% in 2018 compared to 2017, with output declining in the last two quarters of the year by 1.2% and 3.5% respectively. Base chemicals were the most affected.

KARSTEN BECKMANN  
CEO, Brenntag EMEA

**"There is huge possibility to grow anywhere in Asia, for example India, Japan and South Korea"**



Nevertheless, while conceding that current business conditions are less than optimum, chemical distributors remain confident in their expectations of growth for 2019 overall.

Certainly, companies enjoyed a profitable 2018 with diverse portfolios and a wide geographic spread helping in this regard.

Leading distributor Brenntag posted record operating earnings of €875.5m in 2018, a rise of 8.4% on 2017, with sales up 10.2% to nearly €12.6bn. For first-quarter 2019, while the company posted a "solid" performance overall, with operating earnings up 12% to €239m (taking into consideration the first time application of new IFRS accounting standard on leases) and sales 3.7% higher year on year at €3.2bn, the market in Europe, Middle East & Africa (EMEA) saw a further weakening of macroeconomic conditions downturn in demand while costs in key areas such as transport rose.

Notwithstanding, the company is forecasting a pickup in the second half of the year to achieve a growth in EBITDA of between 3-7% for the year as a whole.

German distributor Biesterfeld says in 2018 it grew its revenue to €1.2bn and EBIT to €53.9m through organic growth, namely deepening its relationships with existing partners and building new partnerships with both suppliers and customers.

Major specialty chemicals distributor Azelis also enjoyed double-digit organic growth last year, ending 2018 with revenues of €1.94bn and a "significant increase" in profitability, despite a "more mixed" performance in the last quarter. Despite the less favourable environment, Azelis CEO Hans-Joachim Mueller says he is confident the company will be able to continue its growth trajectory, both organically and through "carefully selected strategic" acquisitions.

## AZELIS LEADS M&A CHARGE

In fact, Azelis was the most active player on the M&A scene last year with five purchases to its name plus its change of private-equity owner to EQT from Apax Partners. The companies acquired were Distralim in Morocco; SammiChem in South Korea; P-K Chemicals in Ireland; Deafarma in Italy; and Ingredi in Sweden.

Brenntag was in second place with four deals: Pachem and Canada Colors and Chemicals, both in Canada; Africa's Desbro and Alphamin in Belgium and the US. Note that two other transactions closed during 2018 but were actually signed in December 2017. These were the purchase of Portugal's Quimitecnica and a majority 65% stake in India's Raj Petro Specialties.

However, when added together, the six acquisitions amounted to a total enterprise value of around €265m. Brenntag also sold its Biosector business last year to Croda for €72m.

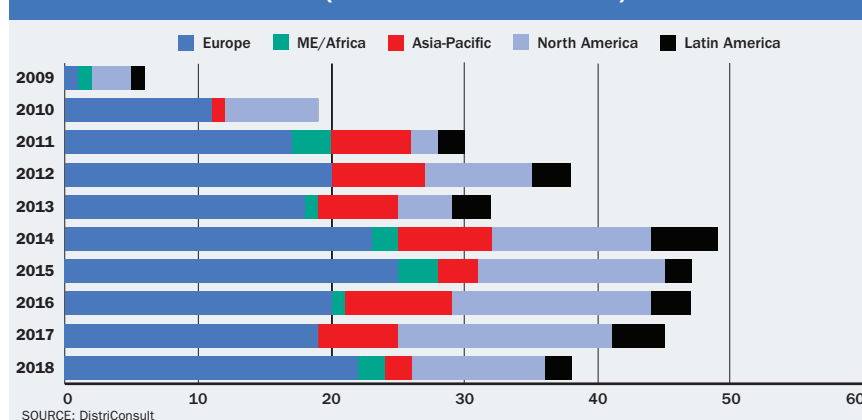
Third position in the M&A acquisition ranking was taken by IMCD, which closed on three purchases: Aroma Chemical Agencies in India, Velox in Germany and US-based E.T. Horn.

According to Guenther Eberhard, senior and managing partner of consultancy DistriConsult, M&A frequency in 2018 was about 15% lower than in previous years – Europe and North America were still the most active regions, doing 22 and 10 transactions respectively, out of a global total of 38. In 2017, Eberhard recorded 45 deals done worldwide.

Eberhard says consolidation was the major driver of 55% of all M&A deals with expansion into new geographies the next biggest factor, accounting for 26%.

In Eberhard's view, the biggest and most

## M&A ACTIVITY BY CONTINENT (NUMBER OF TRANSACTIONS)



» significant transaction of 2018 was Univar's \$2bn purchase of Nexeo Solutions. Nexeo, which became a wholly owned subsidiary of Univar on 28 February 2019, has subsequently agreed to sell its plastics distribution business to an affiliate of private equity group One Rock Capital Partners for approximately \$640m. The sale is expected to close in the first half of this year with net proceeds being used to immediately pay down debt.

For the four months January to April 2019, there have been 15 acquisitions, which Eberhard says puts M&A activity at about the same level as in 2018 in terms of volume. However, he cautions that there are a lot of storm clouds on the horizon, which is now having a dampening effect on the market.

Unsurprisingly, against an uncertain macro-economic background, buyers become more risk-averse and sellers realise they cannot achieve the prices they desire. "People are relatively upbeat at the moment but the overall picture is not that good. The situation will likely become clearer after the second quarter," says Eberhard, adding that the market may have seen a peak for a while.

## MOTTIE KESSLER

Chairman and CEO, 2M Holdings

**"[We] will need to make sure that e-commerce trade platforms do not compromise health and safety"**



Azelis' thirst for acquisitions has carried on unabated so far this year with the distributor adding three companies to its operations, namely Euroconsultant in Poland, MK Ingredients in India and Chemroy in Canada.

"While our overall strategy continues to be primarily focused on generating organic growth, carefully selected acquisitions, which follow a clear strategic and not opportunistic approach, will always play a significant role," says Mueller. He adds that Azelis has been diligently mapping the markets where it plays, always looking for options to further strengthen its presence either in a certain territory or a market segment.

He explains: "This mapping serves as a base to identify interesting local champions that can complement our portfolio and give us access to principals we preferably work with already in other countries."

Asia-Pacific remains the most important growth region for Azelis, as it does for many others, and Mueller adds that the business will also further expand into Africa.

Brenntag too has continued to beef up its global presence in 2019. January kicked off with the purchase of the lubricants business

of US-based Reeder Distributors, followed in March by the takeover of New England Resins & Pigments (NERP), a Massachusetts-headquartered regional distributor of specialty chemicals and packaging solutions.

Brenntag also formed a 51:49 joint venture in March with Singapore's Tee Hai Chem, a move that Karsten Beckmann, CEO of Brenntag EMEA, says is very attractive for Brenntag to boost its life sciences offering, particularly in key markets for pharma and semiconductors.

The latest deal (in early May) was the purchase of Marlin in Lenoir, North Carolina, USA. Marlin provides custom chemical blending and packaging services for liquid and powder products to customers in the Mid-South region.

## MORE DEALS FOR BRENTNAG?

As this article was going to press, Beckmann was anticipating that another acquisition could be announced in the coming weeks. The distribution group's eyes are focused on further expansion in Asia-Pacific as well as in the Middle East, where Beckmann says Brenntag plans to take significant further steps to add to its footprint, with a strong focus on life sciences.

"We have a long pipeline of projects. There is huge possibility to grow anywhere in Asia, for example India, Japan and South Korea," he comments. Even in Europe, there are still countries and activities in certain industry sectors where Brenntag can still grow, according to Beckmann, as the group only holds a 10% share of the overall market. On a global basis, he puts Brenntag's market share at 6%.

The company has also carved out its food and nutrition activities into a separate business unit to facilitate rapid growth in this particular market segment, which Beckmann says is very attractive with strong growth potential and huge innovation opportunity as customers search for new recipes for functional foods.

Biesterfeld too is targeting further expansion.

Group CEO Thomas Arnold says the company is not only focused on developed markets such as countries within the EU, but also on growth markets in Southeast Asia, for example Thailand, Malaysia and Vietnam, along with Latin and South America, such as Brazil and Argentina.

"We will continue to identify market segments and regional markets in which it is worthwhile for us to invest," comments Arnold. He adds that the group's separate business divisions benefit from its "One Biesterfeld" corporate strategy, so that internal synergies and cooperation with partners help it to concentrate on its core competencies and grow continuously.

## HANS-JOACHIM MUELLER

CEO, Azelis

**"Our overall strategy continues to be primarily focused on generating organic growth"**



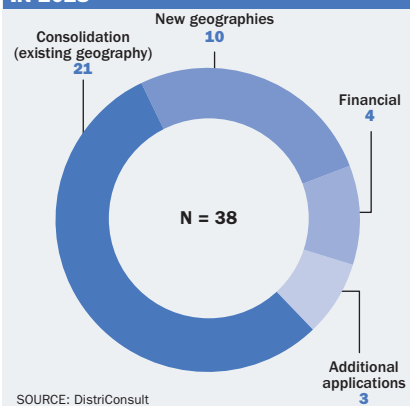
cies and grow continuously.

In order to realise both internal and market synergies, Biesterfeld merged its French subsidiaries last year, a move that Arnold says has enhanced the group's product and service portfolio to the benefit of both customers and suppliers.

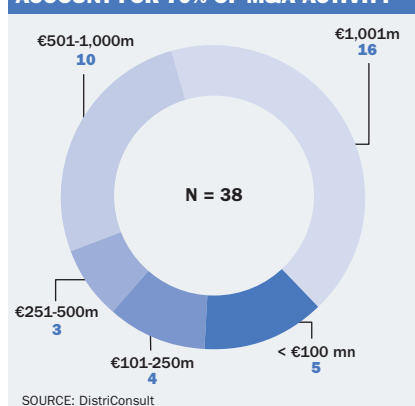
Turning to the UK, 2M Holdings has been expanding outside the country, which also provides it with more options in the event that Brexit eventually takes place. Having previously bought CE-O2 Trockeneis in Dusseldorf, Germany, 2M then added Nuremberg-based Franken Kosmetik in May 2018, which it subsequently renamed as Surfachem Deutschland. The company has won export accolades and most recently was awarded a UK's Queen's Award for Enterprise – International Trade.

2M's chairman and CEO, Mottie Kessler, says Franken has been a "fantastic addition",

## RATIONALE FOR M&A TRANSACTIONS IN 2018



## COMPANIES WITH SALES OVER €500M ACCOUNT FOR 70% OF M&A ACTIVITY



strengthening the Surfachem brand in Germany, Belgium, Slovenia, Macedonia and Serbia. The deal also added an application laboratory and clean room repacking capabilities, enhancing service levels for personal care customers and suppliers.

“Our focus is on leveraging the knowledge and expertise of our special distribution business brands Surfachem and Banner Chemicals in countries whereby there is a customer base that can benefit from our added-value business approach,” Kessler says.

He adds that the group is also growing its export position for brands such as *Perklone*, *Triklone* and *MEC-Prime* solvents, *Pigmentan* (corrosion-prevention, environmentally friendly) pigment and precision cleaning products such as *Samsol De Wax*, *Solvex HD*, *Coolphos*

**THOMAS ARNOLD**  
CEO, Biesterfeld Group

**“We will continue to identify market segments and regional markets in which... to invest”**



and more.

With regard to contingency plans for Brexit – whether hard or soft – 2M has spent the past two years analysing the threats and possible scenarios with customers and suppliers, and developing mitigation and contingency plans.

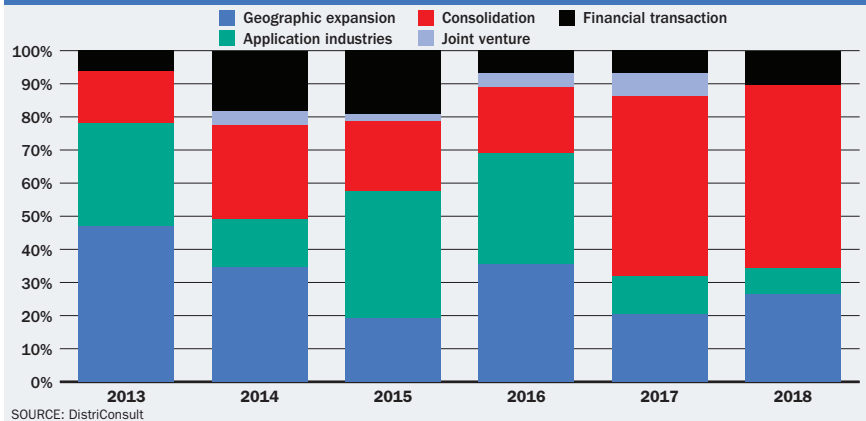
As well as building up its export business, 2M has also increased stock where possible and plans to use its overseas subsidiaries where it makes sense to do so.

Distributors say key industry trends are centred on innovation, sustainability, driving efficiency and digitalisation. Many companies have been investing huge amounts to ramp up their laboratory and R&D facilities around the world as they strive to offer a variety of services to customers in many different market segments.

Azelis, for example, has grown the number of application laboratories it operates to close to 60, from just 12 in 2013. The company has just opened a lab in Italy for agriculture/horticulture and is just about to open another in China. Mueller says that customers are increasingly seeking individual and local offerings, not just for food but also for personal care products.

While digitalisation is seen as an opportunity for the distribution industry, it also poses a threat. Kessler comments: “The traditional business model of managing only a supply chain between producers and customers will be challenged by digitalisation. Producers and distributors will need to make sure that e-commerce trade platforms do not compro-

## RATIONALE FOR M&A TRANSACTIONS, 2013 ONWARDS



SOURCE: DistriConsult

mise health and safety, which is so critical to public safety and our business.”

On the flip side, Mueller says digitalisation will further drive not only industry consolidation but also innovation. He believes the early movers and those who have the critical mass to support digital initiatives will be the winners.

Brenntag has already made a move in this space, launching its Brenntag Connect platform in Germany for the life sciences segment. Beckmann says North America will be next, followed by a global roll-out.

Another key issue for the industry is recruiting and retaining young talent, as well as hiring and promoting female leaders, the latter an area that chemical distributors have not done well, to say the least.

2M is one example of a company actively investing in the future. The company founded its 2M-STEM (science, technology, engineering and maths) programme in 2016 and has recently created a dedicated home for the 2M STEM Centre at its headquarters in Runcorn. The centre was officially opened on 1 April 2019.

Kessler says the aim of the programme is to give young people and women access to a career in STEM; create apprenticeships, employment opportunities and industry placements; enable learning for employees; and to provide a training hub for customers.

Brenntag too has been active in this regard, spending a lot of time in universities to promote the industry to students that are generally keener to work for high-tech companies. In early April, the group invited around 40 students from Ruhr-University to visit its Essen headquarters and discuss career opportunities among other topics.

“Our industry does not have the best image, particularly for young people. It also needs to step up in relation to inclusion and diversity,” notes Beckmann, adding that although Brenntag has an international team, its female leadership is “underdeveloped”. “We need to change this rapidly,” he states.

Looking ahead, and despite ever-lower economic growth forecasts as the year progresses, distributors are undeterred from their expansion plans. Certainly, consolidation in both the distribution sector and the chemical industry at large, looks set to continue, even if the number of transactions slows.

Mueller comments: “The trend of our principal partners to increasingly consolidate their distribution landscape, the ever increasing regulatory requirements and the opportunities that come from digitalisation will, together with some other factors, further drive market consolidation.”

**GUENTHER EBERHARD**  
Senior and managing partner,  
DistriConsult

**“People are relatively upbeat at the moment but the overall picture is not that good”**



However, downside risks to the economic outlook remain prominent and it remains to be seen what impact this will have on M&A activity in 2019. In its May outlook, the Organisation for Economic Co-operation and Development has revised downwards its growth estimates for 2019 and 2020. It projects global growth to ease further to 3.3% in 2019 and 3.4% in 2020 and has made particularly large revisions to its forecasts for the eurozone in both 2019 and 2020, now estimating growth at just 1% and 1.2%, respectively.

Whether distributors’ confidence about their business growth in 2019 turns out to be misplaced will only become clear in due course. What is in no doubt, however, is their desire to continue expanding their value-added services and geographic spread in the years ahead to meet ever-increasing customer demands. ■





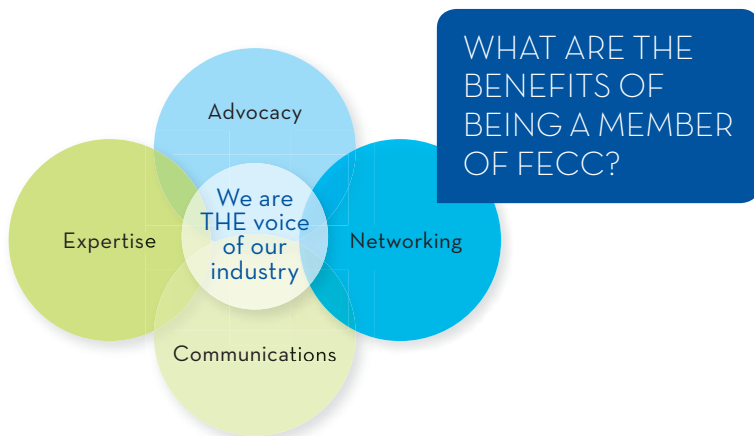
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# GROWING STRONGER TOGETHER

## MEMBERSHIP BENEFITS



**Expertise** – Working Committees and Task Forces work on diverse topics that are important for the chemical distribution industry. The committees provide members with technical advice, services and regulatory support, including early awareness of legislative developments and assist members in taking voluntary initiatives.

**Advocacy** – Fecc actively participates in the European policy development. Representing the industry's interests and views before the European Institutions, through commenting and contributing to future legislative and regulatory processes.

**Networking** – Fecc helps create and optimise opportunities within membership, with industry sectors/stakeholders and institutions as well as serves as a platform for distributors to share best practises and to interact with relevant stakeholders.

**Communications** – Fecc enables its members to build a strong brand through Fecc's expertise, services and marketing. Members will be able to attend the annual congress and other events, as well as receive key information via newsletters or subject specific publications and guidance, as well as benefit from increased visibility through Fecc's media relations.

## WORKING COMMITTEES & TASK FORCES

Leading industry experts contribute to Fecc's activities and the promotion of best practices in the chemical distribution sector.

- Safety Health, & Environment
- Good Trade & Distribution Practice
- International Trade
- Precursors
- Responsible Care & Product Stewardship
- Logistics
- Communication Network

# Making sure chemicals stay on track

Adopting digitalisation will disrupt chemical distribution in Europe, but physical infrastructure such as the rail network still lags behind, says Cefic's Marco Mensink



**MARCO MENSINK**  
Director General, Cefic

**"We anticipate shifting chemicals trade towards marketplaces in a long-term perspective"**

**JONATHAN LOPEZ** LONDON

**T**he European chemical distribution sector is due for a radical change in coming decades as digitalisation makes inroads into the industry, according to Marco Mensink, director general at chemicals trade group Cefic.

As well as transforming business practices, digitalisation can also make chemicals distribution safer and less polluting, helping reduce carbon dioxide (CO<sub>2</sub>) emissions that contribute to global warming.

Mensink adds, however, that the distribution network across Europe, especially railways, needs to undergo a "drastic improvement of reliability and efficiency" if the EU authorities are to achieve their aim to shift from road transport of chemicals to safer, more reliable rail transport.

A third challenge coming up for chemicals in Europe will be to establish common, EU-wide policies for distribution, which would align a disparity of national regulations.

## DIGITAL DISRUPTORS

Chemical supply chains have remained practically unchanged over the last decades. However, digitalisation and artificial intelligence (AI) could prompt a shift that could, according to Mensink, completely change the face of chemicals distribution.

"Supply chains need to become smarter and digitalisation will further help with that. The role of digitalisation is also to make the transport system safer and greener," he says.

Cefic's director general adds that the trade group works together with Fecc within the Digital Transport & Logistics Forum (DTLF), a group bringing together different stakeholders

from the transport and logistics sector. The group has been set up by the European Commission, the EU's executive body.

He adds that the emergence of distributed ledger technologies (DLT) could also disrupt the way chemicals are both manufactured and marketed. A DLT is a consensus of replicated, shared and synchronised digital data that is geographically spread across multiple sites, countries or institutions.

"Digitalisation and the emergence of DLTs is a likely option for the next few decades [in the chemicals industry]. How long it could take, and how far this would go remain question marks. We anticipate shifting chemicals trade towards marketplaces in a long-term perspective," says Mensink.

However, while some within the chemicals industry are excited about the possibilities offered by blockchain to improve trading, those platforms are used by only a minority of players.

Manufacturing and trading chemicals may radically change in coming decades thanks to digitalisation, but the hardware of chemicals distribution will continue to be railways, roads or rivers. In a bloc of 28 countries, the EU's railway systems are still nationally operated and the bloc still lacks a coherent, common strategy for rail transport.

Mensink says there is a need for "leadership" within the EU that is able to set up a strategy able to "overcome national resistance" to improvements which, in his opinion, could greatly improve the reliability of cross-border rail freight.

"[We need a] drastic improvement of reliability and efficiency of rail freight, [which] is critical to achieve greater modal shift from road to rail transport; uniform punctuality KPIs [key performance indicators] should be

put in place, including clear identification of causes of delays, improving the effectiveness of performance management.

"If freight trains are delayed, it is crucial for shippers to receive proactive information with a reliable revised estimated time of arrival (ETA). Improvement of cross-border interoperability is crucial: [We support the policy of] 'No national barriers: one language, less regulation, one highway'."

## MORE POWER TO RAIL USERS

Furthermore, Mensink argues, more power should be granted to the Rail Freight Corridors (RFCs), established in 2010 to promote freight corridors in the continent, in order for them to be able to "steer and direct" changes needed to improve rail freight.

"[Finally,] sufficient funding should be provided to close missing links and put in place sufficient diversionary routes, with appropriate TEN-T [Trans-European Transport Network] infrastructure parameters," he concludes.

Mensink concedes that issues around mobility or CO<sub>2</sub> emissions from transport, as well as noise or traffic jams, are becoming a "growing concern" among Europeans, adding that the chemicals industry and the distributors who serve it will need to become more transparent and better in communicating its purpose.

More public support will be needed from authorities to improve the infrastructure to transport chemicals within the EU, and that can only come from an increase in the budget for the Connecting Europe Facility (CEF), set up by the EU to improve transport links.

"Our need is clear: we need more Europe in Europe. This means infrastructure and regulation should be as in the aviation industry: one language, no barriers, common rules," says Mensink. ■

# Attracting talent is now a priority

Distributors need to reach out to the younger generation to find talented people for the industry, and then ensure they are developed and managed effectively

HEIDI FINCH LONDON

**T**he chemical industry has historically and quite correctly been regarded as a middle-aged and male-dominated environment.

So how is this perception being challenged today? And what are the chemical industry and the chemical distribution/trading sector doing to do create a more balanced and diverse workforce?

Raising awareness of the industry amongst the younger population is one of the main challenges and key necessities to recruiting today's Millennials – now in their early 20s to late 30s.

"This part of the business [chemical trading and distribution] is close to invisible to those not already in the industry and so much needs to be done to let young people know about the sector and the fun and benefits that come from being a part of it," says Gina Fyffe, CEO of trading company Integra Petrochemicals.

While chemical distributors and traders do not have the extensive HR resource and recruitment budgets that the oil and chemical majors do, some, including Integra, have programmes in place to reach out and engage

with young people in education, says Fyffe.

At Brenntag, says chief HR officer Marion Mestrom, "to provide career pathways for Millennials we focus on 'on campus' activities, build alliances with universities and sponsor various projects. We also invite secondary school students to our offices for detailed conversations with Brenntag executives."

## STUDENT DISCUSSIONS

Working with the local school community, offering work experience and holiday work placements to students and undergraduates, sponsoring undergraduates through their university career, mentoring and offering intern and graduate recruitment programmes are all ways that chemical distributors/traders can connect with the younger generations.

Sitting down with students to discuss the opportunities this sector can offer them is also a way to put chemical distribution on the radar of young people. "Using the career stories of our own staff with varied backgrounds makes it more real and relevant," remarks Integra's Fyffe, who also sits on the European Petrochemical Association's (EPCA) Talent, Diversity and Inclusion Council.

Dani Loughran, managing director of Aston Chemicals, notes that "we have found that none of the new graduates that we interview and recruit has thought about a career in distribution or our industry – personal care." She adds that even chemistry graduates are not aware of the various opportunities that chemical distribution can offer.

**GINA FYFFE**  
CEO, Integra Petrochemicals

**"It is two-way... with people across the age and experience spectrum working together"**



Loughran points out that chemistry graduates can use their scientific and technical knowledge in an R&D function or in a sales and compliance capacity. Work travel in a global industry and seeing the tangible benefits of the products you deal with in everyday life are just some of the attractions that can draw graduates to the chemical sector.

Recruitment and awareness programmes have allowed some chemical and trading companies to make inroads into attracting Millennials into the sector. Over the past five years, says Loughran, all except one of the new hires in Aston have just graduated or are moving after their first job, and the expectation is that this trend is likely to continue.

Integra's Fyffe estimates that for every employee over the age of 55 in her organisation, there is at least an equal number of employees in the age range 25-35. There has been an increase in this younger age cohort over the past five years, even when not counting the interns that have been taken on over the last few years, some of whom have stayed and make up part of Integra's younger teams.

Key elements in managing and retaining Millennials in the sector are engaging with the young recruits from the start of their career in the industry, making them feel involved and encouraging them to travel and attend industry events. You need to "keep



Millennials are keen to progress, are often tech savvy and strong advocates of digitalisation in the industry

Money Business/Shutterstock



them in the loop”; show that their opinion matters; and that they can make a difference, remarks Loughran.

“It is all about communication and engagement,” says Jo Stephenson, managing director of PDH Marketing and Strategy and a non-executive director of Cornelius Group.

Stephenson adds that employee engagement programmes; a focus on health and wellbeing; and having a strong corporate social responsibility (CSR) programme all appeal to the younger generation.

“Today’s Millennial and i-generation employees are seeking clear career progression, but balanced with supportive training and development and a sense of work/life balance”, says Stephenson.

Offering flexible working solutions, digital communication programmes and integrating all employees in a team environment are other ways to retain and nurture Millennials in the industry.

What can Millennials bring to the chemical industry and the distribution/trade sector? Generally, they are well educated, have a fresh perspective and a new skill set, are keen to progress, are often tech savvy and strong advocates of digitalisation in the industry.

Digital knowledge and interest are not only exclusive to Millennials, but Millennials are digital natives, having grown up with social media and the internet as a part of their lives. They are thus much more familiar with and have an easier understanding of digital communication, unlike older digital adopters, says Fyffe.

This opens up the opportunity for an informal or formal reverse mentoring, whereby Millennials can transfer their digital knowledge and understanding through the organisation, says Fyffe. “So, for us it is a two-way process, with people across the age and experience spectrum working together to build and transfer skills.”

**MARION MESTROM**  
Chief HR officer, Brenntag

**“As part of our global HR strategy, we are focusing on diversity and inclusion”**



Stephenson adds, “The benefit is that they [Millennials] keep you thinking! Industry 4.0 is creating tremendous change around the world – digitalisation will change the face of industry in the next 10 years and Millennials even find email old-fashioned now.”

She goes on to say that, “they [Millennials] challenge us to think about new digital communications channels, new ways of working, new solutions for our customers and are more open to doing things differently. They add

pace, vibrancy and a passion for success which is always welcome.”

Other considerations when recruiting and managing Millennials are the added costs of training. For young hires, while the formal education, background and knowledge is there, practical skills and experience are often missing, says Stephenson.

**DANI LOUGHRAN**  
Managing director, Aston Chemicals

**“Studies have shown that mixed-gender teams are more productive than single-sex teams”**



Millennials are often a greater flight risk than older more settled employees, because there is the tendency that young individuals gain training and experience in their first company and are keen to move on using it as a stepping stone to other opportunities.

However, treating Millennials as individuals rather than a generic subgroup – “with unique needs and hopes for the future” – and providing them with an enriching work environment is a key aspect of retention not just of this group but of all employees, but seems to be particularly appreciated by younger staff, believes Fyffe.

Diversity, however, goes beyond age and the benefits of finding the best candidate for the role, regardless of gender, race or religion is increasingly being recognised in the chemical distribution/trade sector.

Hiring individuals “specifically for their skills and talents and seeking diversity by removing unconscious bias in hiring programmes” is key to achieving a more diverse workplace, says Stephenson.

Stephenson is also a director of Women in Packaging UK, which aims to encourage diversity in a traditionally male-dominated environment and to connect, support and attract female employees to the packaging sector through networking at industry events and mentoring programmes.

“As part of our [Brenntag’s] global HR strategy, we are focusing on diversity and inclusion,” says Mestrom. Having set up a Global Diversity and Inclusion Committee, the company is a founding member and supporter of the “Women in Leadership Initiative” to increase the exposure of women in management roles.

At Brenntag, Mestrom holds regular succession reviews with the management board. Search companies are asked to ensure that there are qualified women on their candidate lists.

“Some 24% of Brenntag’s middle management is today represented by women. Of course, we are not where we target to be, so

there is room for improvement, but I think we are on a very good way,” says Mestrom. In addition, half of the participants on Brenntag’s global development programme for young professionals are women, notes Mestrom.

Mestrom, Fyffe, Loughran and Stephenson, all of whom have senior leadership positions in the chemical distribution/trade sector, are all proponents of and role models for a diverse workforce in the sector.

Just over 50% of the workforce in Aston Chemicals are women and around 20% of those are currently working part time or on maternity leave and 46% of the directors and managers are women, says Loughran.

However, Loughran makes it clear that employees are promoted according to work performance only, because otherwise that would be discriminatory to qualified men and undermine women’s skills, if they were only hired or promoted on the basis of gender equality.

Loughran recognises the benefits of a gender-diverse workforce, adding that studies have shown that mixed-gender teams are more productive than single-sex teams.

At Integra also has just over 50% of the workforce are women, with employees range

**JO STEPHENSON**  
Managing director, PDH Marketing and Strategy, and non-executive director, Cornelius Group

**“[Millennials] challenge us to think about new digital communications channels... and are more open”**



from 25-76, albeit with the largest age range (35-55) reflecting growth and expansion periods in the company. There are around 22 nationalities working in the company with various mother tongues, following all the major faiths and religions. English is used as the business language.

A diverse workforce allows for different perspectives and different skill sets to be utilised for the benefit of the business and to enhance creativity and innovation and pave the way for future growth, according to some chemical distributors and traders.

It is not about singling out or favouring one group of individuals above others based on gender, race or age, rather it is about “ensuring that everyone is treated equally,” stresses Stephenson. She concludes, “Great teams are always made up of diverse skills and styles that bring a range of talents to the table to boost business creativity and make decisions,” remarking that a diverse workforce is “the lifeblood of our business”. ■



The gap between global growth of container shipping and that of GDP has been gradually shrinking since the turn of the century

# Prepare for supply chain evolution

Global supply chains are experiencing rapid change, brought about by a reverse in globalisation, trade tensions and environmental pressures, with huge impacts expected

**SEAN MILMO** LONDON

International distributors of chemicals and other products face new pressures because of changes in global supply chains. Economists calculate that the trend to globalisation has peaked and believe that current economic trends could accelerate its decline.

"The post-World War II process of globalisation driven by multilateral agreements that allowed ever-increasing trade openness is being challenged," says Laurence Boone, chief economist at the Paris-based Organisation for Economic Co-operation and Development (OECD), in its latest Economic Outlook issued in May 2019.

World trade, which has grown relatively smoothly over the last three decades, except in the immediate aftermath of the 2008 financial crisis, is now being undermined by trade con-

flicts, particularly between the US and China. Another source of trade friction is Brexit, which could fracture the EU's single market, the world's most highly organised free-trade area.

A third factor behind new trends in supply chains is climate change, with increasing incidents of extreme weather disrupting shipping and other forms of transportation.

The resulting transformation of many supply chains will require a great deal of flexibility and reorganisation among distributors and logistics companies – as well as chemical and raw material producers.

Among the economic influences altering supply chains, trade tensions are already having an impact by slowing economic growth and world trade. The US decision in May 2019 to raise tariffs on \$200bn of Chinese imports from 10% to 25%, together with China's retaliatory tariffs on \$60bn of US imports

and related effects, could reduce world growth in trade by 1.6 percentage points by 2021-22, according to OECD estimates.

If all China's nearly \$560bn of annual exports to the US were subject to 25% tariffs and China took similar action against all US \$180bn of exports to China, the effects on world trade would be far worse.

## CONTAINER GROWTH SLOWING

The gap between global growth of container shipping and that of GDP – the container trade-to-GDP multiplier – has been gradually shrinking since the turn of the century, according to figures from A.P. Moller-Maersk, the global leader in the container shipping market. In 2001-2007 the multiplier averaged 3.0%, in 2008-2011, 2.7%, in 2012-2014, 1.5% and in 2015-2018, 1.2%.

Underlying this slowdown in trade activity

have been alterations in the structure of global value chains (GVCs) which have been the main impetus behind globalisation. They have enabled offshoring of various stages of the manufacture of products to different locations around the world to take advantage of lower costs and easily accessible raw material sources.

But as GVCs have become longer and more complex they have lost momentum in recent years, an OECD study has concluded.

Wage costs in emerging countries have been rising in emerging countries while greater use of automation has been cutting manufacturing costs in developed economies. At the same time, transport costs have been increasing.

The scope for further elimination of trade barriers has narrowed with greater use of protectionist tariffs in some developing countries and the introduction of quality and other standards for imported chemicals and materials. Breaches of intellectual property rights remain a problem.

As GVCs have lengthened, there have been rising incidences of logistical disruptions and rising raw material costs due to scarcities. Although the quality of products from off-shore sites has improved, it is still a matter of concern for Western end users.

As a result, distributors are likely to have to adapt to GVCs that are shorter and more simply structured. There will be moves to set up GVC hubs closer to end-user markets, according to the OECD report.

Although there may be a rise in reshoring of manufacturing, production could still increase in emerging nations. But instead of being used for exports, it will serve expanding domestic markets of increasing numbers of middle-class consumers.

## BIG IMPACT FROM DIGITALISATION

Digitalisation may become the “biggest game changer” for the future of GVCs by making offshoring less attractive as labour costs become less important in total production costs. “International sourcing will decrease significantly and intermediaries will increasingly be sourced domestically in developed economies,” OECD says.

Digitalisation is also becoming a significant factor in the competitiveness of logistics companies and distributors. Bigger players are expected to benefit the most from digitalisation because they have the resources to invest heavily in large scale schemes to gain an even bigger lead in productivity than they have at the moment.

Among some shipping and logistics companies, digitalisation is seen as a means of lowering costs and raising efficiencies at a time when they are expecting that the slow-down in international trade, coinciding in increases in new capacity, will drive down freight rates.

Major players like A.P. Moller-Maersk have been among the first in the shipping and logistics sector to start the digitalisation of its operations after reorganising the business, with total sales last year of \$39bn and 88,000 employees, from a conglomerate into a single container shipping and logistics company.

“We have made progress on the digital transformation of our business, digitalising customer transactions, improving how we operate the business and our assets and enabling new business opportunities,” said Soren Skou, chief executive of A.P.Moller-Maersk.

## ONLINE OCEAN TRANSPORT BOOKING

It has digitised ocean transport transactions, enabling customers to do everything online, from obtaining a price quote, to booking and documentation. “For many years, we have had the ambition to make it as simple to book a container as it is to book an airline ticket,” commented Skou.

Maersk.com is now one of the largest business-to-business transaction sites in the world with more than 35,000 daily users and 20,000 daily bookings. Through it, Maersk is setting an example of effective digitalisation of trans-

### SOREN SKOU

Chief executive, A.P. Moller-Maersk

**“We have had the ambition to make it as simple to book a container as it is to book an airline ticket”**



actions to the rest of the international shipping industry.

It is also testing digital schemes to increase the traceability of dry cargoes. In April 2019, it launched an online customs clearance management platform handling export and import declarations. “It saves our customers time, money and headaches and reduces the number of intermediaries they deal with from three or four to just one, as well as paperwork,” explains Vincent Clerc, chief commercial officer at A.P. Moller-Maersk.

Already digitalisation is making supply chains leaner and simpler to work with. Competition from an increasing number of digitalised low-cost operators is forcing freight forwarding agencies to diversify into additional services, such as packing and packaging, warehousing and cargo insurance.

Digitalisation is also helping the dissemination of information along supply chains about the compliance of products and materials with chemicals safety legislation like the EU’s Reach and Restriction on Hazardous Substances (RoHS) for the electronics and electrical sector.

Making compliance declarations can be a

difficult task for distributors handling chemicals, for example, from emerging countries. The job becomes even harder when companies want details of specific substances of concern in the chemicals and products that they are buying.

“Most suppliers are meeting the minimum requirement of providing with their products declarations of compliance with legislation like Reach,” explains Aidan Turner, director of BOMcheck, a UK-based centralised web database of suppliers’ product and substance information and from which declarations to industry standards can be downloaded.

“Companies in the supply chain need to know more than just that products are Reach or RoHS compliant,” he continues. “They want to know about specific substances in the products to ensure that declarations comply with the latest versions of regulations.”

The European Chemicals Agency (ECHA) administering Reach regularly adds chemicals to its list of Substances of Very High Concern (SVHC) that should be included in product declarations. Even keeping up to date with regulatory items like SVHC lists is no longer sufficient because of the spread of circular economy schemes.

Companies need to know whether chemicals and materials are still compliant with the latest regulations when they are recycled or used for remanufacturing. That will require putting all the substances in a product in materials declarations.

“With PVC-coated copper wiring, for example, that means not just listing the regulated substances in a declaration but all the substances – the copper, the PVC, colourants, plasticisers, flame retardants and any other additives,” says Turner. “Suppliers will have to reorganise their operations so they are proactive rather than reactive.”

## ENVIRONMENTAL CONCERNS

Growing concerns for the environment are raising demands for greater data exchange along supply chains. Companies purchasing chemicals and other materials from producers and distributors want information about the environmental performance of both the product and the supplier, and about the raw materials and other suppliers further upstream.

Dissemination of increasing amounts of information along supply chains is taking place not only over the entire life cycle of products and materials, but also during their circular economy lifetime, when they are being recycled or remanufactured.

This can be a complex task for distributors. With the necessity for recycling and reuse being driven by the need to protect the environment and conserve resource, customers will want a breakdown of the entire chemicals content of their products. ■



# Regulation is a key ingredient

Growing numbers of chemical distributors are moving into the food and cosmetic ingredient sectors, but they need to be fully cognisant of a huge range of regulations



Growing use of nutrition labelling on packaged foods means distributors need to be able to guarantee the origin and purity of the ingredients they supply

JANE GIBSON LONDON

The life sciences sector offers attractive returns for chemical distributors, with the result that more companies are moving into the food ingredients and cosmetics markets. But complying with regulations in the sector is not always simple and new trends in society towards healthy, natural and organic foods and products mean that regulation will continue to evolve.

María Almenar, head of SHEQ and CSR programme champion at Azelis, explains that the food and food ingredients area is regulated by multiple European Commission directives, which predominantly cover:

- Safety of ingredients and finished products
- Traceability of all ingredients used through the whole supply chain down to the farms
- Labelling of ingredients used, so that consumers can understand what they are consuming.

In non-EU countries in Europe, there are local regulatory bodies developing similar standards and mostly following the EU directives.

Almenar says, “It is very challenging to comply as we have thousands of products distributed globally, but we have experts throughout Azelis following the latest regulatory developments and the impact they might have on our product portfolio. We are members of the different national associations and European (Fecc) and international (ICTA) associations, which helps us to be at the forefront when it comes to new legislation.”

Michael Pätzold, executive director of Germany’s Verband Chemiehandel (VCH), says, “One of the basic regulations that distributors have to adhere to is the 2002 General Food Law which covers all stages of food and feed production and distribution.

“In addition there are laws related to food enzymes, food flavourings, food colourings, food supplements, novel food products and pesticide regulation. Food hygiene standards and guidance need to be applied as well – for example the Hazard Analysis Critical Control Points (hACCP) risk analysis, based on the principles laid down in the *Codex Alimentarius*. There are

also regulations covering plastics packaging that come into contact with food as well as rules related to transportation.”

Regarding food regulation, the hot topics are food defence and food fraud. As Pätzold explains, “Food defence is similar to food safety – as an organisation you have to be able to guarantee that food ingredients haven’t been intentionally manipulated or exposed to other products – how can you protect a product from toxins?

“Food fraud meanwhile is when a product is sold as one thing but is actually another – a product might be sold as sugar, for example, but could be a powder containing toxins. You need to be able to show how you tested and audited your suppliers.”

Societal trends meanwhile are influencing regulation more and more. The environmental concerns of the consumer and the move to achieve a circular economy are impacting food packaging and food contact materials regulations. Meanwhile, the move to food as a supplement, especially given an ageing society where food ingredients are used as enhanced nutritional support, means that labelling and traceability become a focus.

Almenar at Azelis explains, “As a bridge between the manufacturers of food and cosmetic ingredients and customers, it is extremely important to be well aware of the market trends. This enables us to offer solutions to the markets which will be fully compliant with all

**MICHAEL PÄTZOLD**  
Executive director, Verband  
Chemiehandel

**“Food is a very sensitive area. Big customers know how to comply and expect that you know too”**



actual regulatory and legal requirements and at the same time are in line with product requirements of customers and consumers.”

The EU is trying to tackle pollution from single-use plastics and marine litter and there

will soon be a raft of new rules that limit the use of 10 single-use plastic products, including food packaging products. This is likely to result in a shift towards non-plastic food contact materials (FCMs). Many materials, such as paper, card, inks and linings are not controlled by harmonised EU-level law, but current legislation is being reviewed.

Health and wellness are driving growth in the global food and beverage industry, and this is increasing demand for well-being products. Tom Corcoran, group vice president at Brenntag Food & Nutrition, says, "Companies are entering the food arena because the industry is very innovative. Our customer base includes a

#### TOM CORCORAN

Group vice president, Brenntag Food & Nutrition

**"Our customer base includes... small and medium sized-customers who value innovation"**



mix of small and medium sized-customers who value the innovation that we can provide to meet consumer trends: many companies are moving towards healthier products. More people are looking at the label and they are looking for clean labels and healthier products."

"Clean label" essentially means making a product using as few ingredients as possible. The ingredients should be items that are considered wholesome and easy-to-recognise and should contain no artificial ingredients or synthetic chemicals.

Corcoran adds that the low sugar regulations in Europe have also prompted a trend of high-fibre and high protein, which is a more healthy option. "There's a real transition in the way food is viewed. It's not just food anymore; consumers want it for the health benefits as well."

Changing consumer trends such as this means that regulations are constantly under review. Almenar says, "We can expect further changes in revision of the different statuses of the food ingredients in the coming years. It is very likely that there will be more regulations on requirements for claims such as 'organic', 'natural' and 'clean label' for flavours and colours."

Pätzold adds, "Food ingredients is a very sensitive area. Big customers know how to comply and they expect that you know too. For vegan and gluten-free products, companies have to ask if it might contain allergens, and this includes in the packaging. Nutrition values are all checked too.

"There is an increasing trend that the responsibility is shifting to the distributor – the distributor is now an expert and is taking over the risk. This means you need to have experts

in the sales and purchasing and health and safety departments. They have to take the orders from customers, which usually includes filling in a detailed questionnaire. They also have to inform the local authorities, for example, they might want to see your audit."

Almenar explains that Azelis' networks have the necessary technical/regulatory knowledge to cover EU regulations. But, she adds, "In some geographies, eg Asia-Pacific, the regulatory landscape can be extremely complicated and there is a language barrier too, so we do sometimes need the help of external consultants to help us with specific questions when it comes to local compliance."

Guaranteeing the traceability of food ingredients becomes essential. Brenntag's Corcoran says, "We have a rigorous supplier approval process. It is important to make sure that where we are sourcing ingredients, they have the controls in place so that we are able to offer assurances to our customers.

"For food ingredients we have a dedicated area in our storage facilities. As the market moves towards more natural products, refrigerated storage and refrigerated transportation become real requirements that are essential to meet the needs of the suppliers and customers. This all goes back to traceability."

#### COSMETIC REQUIREMENTS

For cosmetic raw materials, Almenar says that the main regulations continue to be those that apply to chemicals in general (such as Reach). Additionally, all cosmetic products that are placed on the market in the EU need to comply with the European Cosmetic Directive.

She points out that therefore, the raw materials for the personal care markets need to enable customers to comply with the requirements.

According to Almenar, topics that are high on the radar for regulations in the personal care industry are:

- Human protection: safety of the product in the formulation (limit of concentration, restriction of application (aerosols, etc)
- Environmental protection: safety of the product itself, ban of products because of the environment, feedstock, cruelty free
- Transparency in sourcing: fair trade, child labour, Roundtable on Sustainable Palm Oil (RSPO), etc.

Almenar points out that as in the food ingredients industry, there is a trend towards customers asking for more natural materials and organic sources. This translates into new standards like RSPO and the Nagoya Protocol on Access to Genetic Resources and the Fair and Equitable Sharing of Benefits Arising from their Utilisation, a part of the UN Convention on Biological Diversity.

The main discussions currently are around the classification of TiO<sub>2</sub>, as well as nanomaterials and the ban of microplastics, says Almenar.

"We are following these developments very closely in order to keep our customers up to date and to be able to offer alternative products in time. We are starting to see bans of nanomaterials in some countries for certain industries.

"The same can be said for microplastics, where we can expect more bans to come. Denmark for example has temporarily banned the use of microplastics in the cosmetics industry so we expect stricter regulation to appear elsewhere at EU level. We actively offer our customers sustainable solutions as alternatives to products that can potentially be regarded as microplastics, now or in the near future."

France will ban the use of titanium dioxide as a food additive from 2020 and there is an increasing trend of individual countries imposing regulations for either health or environmental reasons.

Pätzold says, "If an individual country bans a certain ingredient or the use of the ingredient for a certain application, the impact for the industry is huge, since it can't simply change recipes. Restrictions are having a major impact on the industries in this sector."

The scale of regulation within the food ingredient and cosmetics industry means that there are some barriers to entry. Almenar says, "Legislation like Reach in the EU can certainly have an impact on distributors. There are some costs associated to stay in the market and to register products. Furthermore, it can be very challenging for smaller organisations to have a network of regulatory experts. This is where a distributor adds significant value to their customers since we can help them with our expertise and internal network of experts."

In terms of advocacy, Fecc is currently building up its life sciences committee. Pätzold says,

#### MARINA ALMENAR

Head of SHEQ and CSR programme champion, Azelis

**"We are starting to see bans of nanomaterials in some countries for certain industries"**



"We are not involved in much advocacy at present. The next thing to look at is the European Chemical Agency (ECHA) regulation that comes into force in 2020."

Almenar says that what could be improved, is the harmonisation between regulations globally and locally, but also between different regulations that might be contradictory.

Corcoran agrees. "We all strive for simplification and shy away from over-regulation. At times, some regulatory authorities can be slow to react and this can dampen innovation. But it is simply all about consumer safety and good information for the consumer." ■



# Blockchain trials prove its potential

Blockchain is increasingly being recognised as the way forward to guarantee secure information transmission and storage along the chemical supply chain

SEAN MILMO LONDON

**B**lockchains are taking off more quickly than expected, not just as a means for running cryptocurrencies but also in a wide range of business processes – some of which play key roles in chemical and other supply chains.

But considerable doubts still remain about the viability of introducing blockchain systems for long-term purposes, particularly from the point of view of investment costs.

“In 2019, something unmistakable appears to be happening,” says management consultancy Deloitte in the results of its latest annual survey, conducted earlier in the year.

“What has emerged is a shared recognition that blockchain is real – and that it can serve as a pragmatic solution to business problems across industries and use cases. Even leaders wary of tech-based solutions have come to see the larger, transformational importance of the technology.”

Over half of the executives – 53% – ques-

tioned by Deloitte said that blockchain was now one of their company's top five strategic priorities, compared with 43% last year. The survey covered 1,386 senior executives in large to medium-sized companies based in the Americas, Middle East, Asia and Europe.

Eighty-two per cent reckoned that their suppliers, customers and/or competitors are discussing or working on blockchain solutions to value-chain challenges, and 77% believed that their companies would lose competitive advantages if they did not adopt blockchain technology.

## GREATER CONFIDENCE IN USE

Over the last year, there has been a marked decrease in worries among executives about the barriers to the introduction of blockchain systems in their organisations – such as difficulties in replacing existing systems, regulatory issues and potential security threats.

Blockchain seems to be proving itself, at least potentially, as a highly effective technology. There seems to be decreasing numbers of

companies worrying about its complexities.

Its basic concept of “blocks” of data being linked together in “chains” is appealing to a growing number of companies. Each block contains information about transactions, such as data, time, value in dollars, euros or other currencies, and participants.

Data directly and indirectly related to the transactions is placed in a coded block after being verified, usually through a smart contract agreed by participants. The block is then added to the blockchain. In this way, each computer in the blockchain network is kept constantly up to date with new transactions.

The great attraction of the blockchain system for companies, especially those whose businesses are heavily dependent on supply chains, is that it is a decentralised method of bringing together multiple different versions of transactions, rather than the traditional option of relying on a centralised intermediary to do the job.

An important advantage of blockchains is that they are effectively governed by smart



contracts or facilities for automatically triggering terms of contracts without the need for intervention of a central authority, legal entity or external enforcement mechanism.

Within chemical supply chains, the main advantages of blockchain are greater security, with hacking being virtually impossible; improved reliability; lower operating costs; and much faster access to transaction data for tracking and tracing of products.

Application of blockchain technology in the chemicals and other supply chains has been brought to the proof-of-concept stage with the help of trial projects by supply chain network specialists, logistics organisations and chemicals producers themselves.

Elemica, a US-based leader in the setting up and operation of digital supply networks in the chemical and other processing industries, has been among the most active in the development of blockchain for the sector.

Early this year it completed a successful blockchain pilot project in partnership with crossinx, a Frankfurt, Germany-based specialist in the digitalisation of document-based finance and business processes. The project included a number of unnamed leading chemical producers.

"Similar to any new technology, there is a period of learning and evolution before adoption," explains Arun Samuga, Elemica's chief technology officer. "We like what we see so far and are identifying areas of clear applicability of the technology."

The pilot project showed that the capability to automate document exchange along the supply chain could lead to a wide range of benefits. These could include auto-ordering based on internet-of-things (IoT) information, automated purchase order confirmations, auto-invoice creation, auto-matching of invoices and auto-payments.

"Our goal is to use the blockchain to automate document exchange along the supply chain and make it more transparent," adds Marcus Laube, crossinx's chief executive and founder.

Soon after the completion of the crossinx-partnered project, Elemica joined with San Francisco, US-based Centrifuge, a specialist in blockchain connections to financial services, to enable third parties to create their own blockchain applications and smart contracts. These would be operated to benefit all Elemica network users.

A number of individual multinational chemical companies have been testing their own blockchain schemes. Heinz Lux, senior digital strategist at Evonik Digital, told a recent supply chain innovations conference that Evonik hoped shortly to announce some successes with its schemes which would have a "significant impact" on its business.

#### TEXTILE TRACEABILITY AT LENZING

Lenzing, the Austrian-based leader in the production of cellulose speciality fibres, is using blockchain technology for the tracing of its fibres from manufacture to the retail sale of finished garments. The company says it is responding to what it sees as the increasing desire of consumers to find out about the ingredients and suppliers of the products they buy.

Lenzing is joining TextileGenesis, a Hong Kong-based platform for the apparel sector created to ensure the traceability of sustainable textiles such as wood-derived cellulose fibres, premium cotton, silk, wool and cashmere.

Lenzing is conducting pilot tests before aiming to make the scheme fully operational next year. "With Lenzing *Ecovero*-branded fibres, Lenzing was the frontrunner in physical traceability and is now entering the age of digital traceability. This milestone in trans-

parency is a further strong commitment to sustainability", says Stefan Doboczky, Lenzing CEO. "Together with TextileGenesis, we aim to create an unmatched level of transparency for brands and consumers. With this step Lenzing will further help to green up the textile industry."

Blockchain is now being expanded into large-scale schemes covering chemical and other supply chains with multiple participants. Maersk, part of A.P.Moller-Maersk, global leader in container tankers and shipping services, has combined with IBM, a leader in open-sourced blockchain systems, to set up *TradeLens*, a platform for applying blockchain technology to worldwide supply chains.

Its participants include 20 port and terminal operators, such as PSA Singapore, Modern Terminals in Hong Kong and Port of Rotterdam, the container carriers Maersk Line, Hamburg Sued and Pacific International Lines

**STEFAN DOBOCZKY**  
CEO, Lenzing

**"With this step Lenzing will further help to green up the textile industry"**



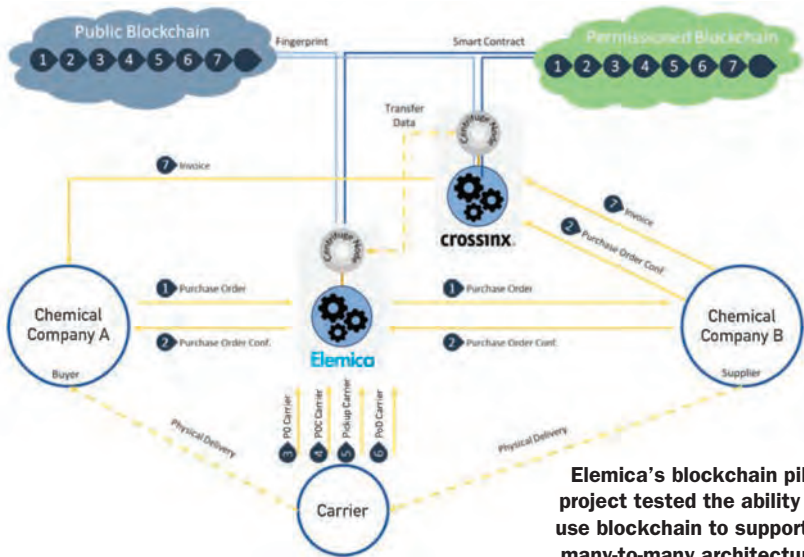
(PIL), custom authorities in Europe, Middle East and Asia and leading freight forwarders.

Before the announcement of the launch of *TradeLens* last year, Maersk and IBM carried out 12 months of trials with participants like DuPont, Dow Chemical and packaging processor TetraPak. While under current data handling systems, companies must share documents via email attachment, fax and courier, *TradeLens* can track and record critical data on around 1m "shipping events" per day.

There is still much debate among logistics and other experts about how long blockchain is likely to take to be widely applied across the world, particularly in international supply chains. Elemica claims that a major obstacle – the development of an acceptable legal framework for smart contracts and other key components of blockchains – could be accomplished in 1-2 years, leading the way to the technology being commonplace within five years.

However, some technology analysts believe that blockchain is more far reaching than merely being a disruptive system that is a strong competitor to existing technologies. Instead, it is a foundational technology that will ultimately replace existing systems.

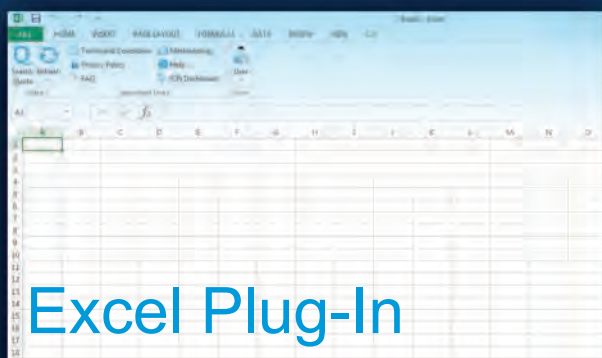
Blockchain will have to surmount formidable barriers because it requires changes in the organisation, attitudes and skills within companies. It may take at least 25-30 years after it was first used in 2009, as a core component of cryptocurrencies, for it to become even a routine business application across the world. ■



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# ICIS Top 100 Chemical Distributors

We rank the global players by sales and also break out regional leaders in North America, Europe, Asia, Middle East & Africa and Latin America



**SARAH CRESWELL** LONDON  
**JOSEPH CHANG** NEW YORK  
**WILL BEACHAM** BARCELONA

## 1 **BRENTTAG** 2018 SALES: \$14.4BN (€12.6BN)

**Essen, Germany**

[WWW.BRENTTAG.COM](http://WWW.BRENTTAG.COM)

**CEO:** Steven Holland

**Products:** Full-line range of more than 10,000 products; industrial chemicals; adhesives; paints; oil and gas chemicals; food and nutrition ingredients; water treatment chemicals; personal care ingredients; pharmaceutical ingredients; cleaning chemicals; coatings and construction chemicals; animal nutrition products; pulp and paper chemicals

**Services:** Tailor-made distribution solutions for industrial and specialty chemicals; one-stop-shop solutions; specific application technology; extensive technical support and value-added services such as just-in-time delivery, product mixing, formulation, repackaging, inventory management and drum return handling

**Assets:** More than 580 locations in 73 countries; more than 16,600 employees

## 2 **UNIVAR SOLUTIONS** 2018 SALES: \$8.63BN

**Downers Grove, Illinois, US**

[WWW.UNIVARSOLUTIONS.COM](http://WWW.UNIVARSOLUTIONS.COM)

**President and CEO:** David C Jukes

**Products:** Additives; aviation fuel additives; chelates; hydrocarbons; inorganics; monomers; oils; oleochemicals; pigments; plasticizers; polymers/resins; silica; silicones; solvent blends; solvents; surfactants

**Services:** Technical support; ChemPoint e-distribution; custom blending; custom packaging and private label services; laboratory and formulation services; minibulk; sustainable services; telemetry services; transportation; warehousing; delivery to more than 130 countries

**Assets:** More than 3,500 tractors, trailers and tankers; global network of 24 formulation labs, development kitchens and research centres; nearly 10,600 employees in 31 countries; over 1,300 suppliers

## 3 **TRICON ENERGY** 2018 SALES: \$7.81BN

**Houston, Texas, US**

[WWW.TRICONENERGY.COM](http://WWW.TRICONENERGY.COM)

**President and CEO:** Ignacio Torras

**Products:** Chlor-alkalis; aromatics; glycols; fibre intermediates; solvents; olefins; polymers; fertilizers

**Services:** Marketing; pre-export financing; shipping; logistics; packaging; blending; storage; just-in-time delivery; repackaging; inventory management; risk management for commodity price and foreign exchange; global presence with sales into over 100 countries

**Assets:** 28+ offices; more than 450 employees

## 4 **HELM** 2018 SALES: \$5.85BN (€5.11BN)

**Hamburg, Germany**

[WWW.HELMAG.COM](http://WWW.HELMAG.COM)

**CEO:** Hans-Christian Sievers

**Products:** Feedstocks; methanol; organic and inorganic chemicals; acids and lyes; active pharmaceutical ingredients; pharmaceuticals; fertilizers; crop protection ingredients

**Services:** International marketing; logistics; production; project development; scientific and technical services

**Assets:** More than 100 subsidiaries; sales offices and participation in over 30 countries

## 5 **IMCD** 2018 SALES: \$3.16BN (€2.68BN)

**Rotterdam, Netherlands**

[WWW.IMCDGROUP.COM](http://WWW.IMCDGROUP.COM)

**CEO:** Piet van der Slikke

**Products:** Specialty chemicals and ingredients; pharmaceutical ingredients; coatings, adhesives, sealants and elastomers (CASE); personal care ingredients; advanced materials; food and nutrition ingredients; animal nutrition ingredients; nutraceuticals; lubricants; synthesis chemicals; HI&I chemicals; oil and gas chemicals

**Services:** Technical sales; marketing of specialty chemicals and food ingredients; application laboratory services; local and central stock holding; drumming; repackaging



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

blending; sampling

**Assets:** 45 market-focused application laboratories; 2,799 employees; 74 offices and 94 warehouses throughout all operating companies in Europe, Turkey, Africa (EMEA), Australia, New Zealand, India, China, Malaysia, Indonesia, Philippines, Thailand, Singapore, Vietnam, Japan (Asia-Pacific); US, Canada, Brazil, Puerto Rico, Chile, Argentina, Uruguay (Americas)

6

**SINOCHEM PLASTICS**  
2018 SALES: \$3.08BN

Beijing, China

[WWW.SINOCHEMPLASTICS.COM](http://WWW.SINOCHEMPLASTICS.COM)

**General Manager:** Zhang Xiaolei

**Products:** Engineering plastics; plastics (ABS, AS, PS, PMMA, MS, PC, PA, POM, PC/ABS, ASA, POE, PVC, EVA, Q-resin and ABSHR); high performance plastics (modified nylon, modified PBT, modified polyformaldehyde, polysulfone and PES); plastics additives; epoxy resin; BPA; crude glycerine; UPR; coatings (organic silicon, emulsion, coating agent, surfactants); fluff pulp and SAP; synthetic rubber (IIR, SBR, EPDM, SBCs, TPE); automotive plastics (PE, modified PP); fine chemicals; polyurethanes; vulcan chemicals; specialty chemicals; agricultural products; food ingredients; textile and leather chemicals; dyestuffs and pigments; coatings materials; intermediates; solvents; oleochemicals; pine chemicals

**Services:** Raw material marketing services; diversified product solutions; one-stop procurement; supply chain management; technical support; commissioned processing; brand maintenance; information consultation

**Assets:** Four warehouses with gross area of 82,833 square metres and total construction area of 57,984 square metres; two office buildings with gross area of 9,939 square metres.

**Trading sales:** 46%

7

**AZELIS**  
2018 SALES: \$2.22BN (€1.94BN)

Luxembourg

[WWW.AZELIS.COM](http://WWW.AZELIS.COM)

**CEO:** Dr Hans Joachim Mueller

**Products:** Animal nutrition ingredients; food and health ingredients; personal care ingredients; homecare and industrial cleaning chemicals; pharmaceutical ingredients; specialty agriculture/horticulture chemicals; CASE; electronic chemicals; essential chemicals; fine chemicals; lubricants and metal-working fluids; rubber and plastic additives; textile, leather and paper chemicals

**Services:** Laboratory analysis; formulation development and blending, expert technical and regulatory support; repackaging; flexible pack sizes; local stockholding; market research and trend analysis; GMP and clean-

room pharmaceutical facilities; integrated supply chain; sampling

**Assets:** 60 application laboratories; offices and access to warehouses across EMEA, Americas and Asia Pacific; technically trained sales force

8

**PLUSCHEM EEIG**  
2018 SALES: \$1.5BN

Dublin, Ireland

[WWW.PLUSCHEM.COM](http://WWW.PLUSCHEM.COM)

**President:** Alan Looney; **CEO:** David Salter

**Products:** Specialty chemicals; fine chemicals; commodity chemicals; pharmaceutical/synthesis chemicals; food/feed/agro chemicals; cosmetics ingredients; general industrial chemicals

**Services:** Bulk storage; logistics/trucking; repackaging; blending; warehousing including food products and hazardous/dangerous goods

**Assets:** Multiple wholly owned warehouses in various countries (Spain, Portugal, France, Italy, Canada, South Africa); logistics/transport assets; bulk liquid storage tank farms

**Trading sales:** 20%

9

**BIESTERFELD**  
2018 SALES: \$1.43BN

Hamburg, Germany

[WWW.BIESTERFELD.COM](http://WWW.BIESTERFELD.COM)

**CEO:** Thomas Arnold

**Products:** High performance polymers; engineering polymers; thermoplastic elastomers; styrenic polymers; acrylic polymers; standard polymers and additives; raw materials for cosmetics, pharmaceuticals, organic synthesis, household cleaning, food and beverage; coatings, adhesives, sealants, elastomers (CASE); synthetic rubbers; silicone and fluorosilicone rubber compounds; carbon black; industrial and agricultural chemicals; plant protection products and fertilizers; pharmaceutical raw materials; animal nutrition and health care chemicals

**Services:** Individual solutions; technical expertise and consulting; active application development and product specification; direct and warehouse distribution; blending; storing; formulation and technical assistance; laboratory support of specialty chemicals; less-than-truckload (LTL) quantities; customised logistical solutions; marketing; consultancy and advisory services for Europe's REACH regulation; legal compliance; silicone rubber compounding

**Assets:** Subsidiaries in more than 30 countries; application laboratories; blending and storage facilities for solid and liquid chemicals

**Trading sales:** 10%

10

**STOCKMEIER HOLDING**  
2018 SALES: \$1.38BN (€1.20BN)

Bielefeld, Germany

[WWW.STOCKMEIER.DE](http://WWW.STOCKMEIER.DE)

**CEO:** Peter Stockmeier

**Products:** Industrial chemicals (acids, caustic, solvents, solids); specialty chemicals for industrial and home care, coating, construction; cleaning products; peracetic acid; polyurethane chemicals; flavours and spices; printing inks; textile auxiliaries; AdBlue; water treatment chemicals

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

**Assets:** More than 40 locations in Europe, 200 trucks

11

**SNETOR**  
2018 SALES: \$1.36BN

Courbevoie, France

[WWW.SNETOR.COM](http://WWW.SNETOR.COM)

**President:** Emmanuel Aubourg

**Products:** PE; PP; PVC; PET; PS; ABS; engineering polymers; polyol-TDI; industrial chemicals

**Services:** Trading; distribution; packaging

**Assets:** 15 warehouses; technical support

**Trading sales:** 75%

12

**MANUCHAR**  
2018 SALES: \$1.35BN

Antwerp, Belgium

[WWW.MANUCHAR.COM](http://WWW.MANUCHAR.COM)

**CEO:** Philippe Huybrechs

**Products:** Sodium sulphate; soda ash; STPP; zeolite; caustic soda; sodium bicarbonate; calcium chloride; sodium lauryl ether sulphate (SLES); linear alkyl benzene sulphonic acid (LABSA); glycerine; surfactants and oleochemicals; silicones; emulsifiers; resins and monomers; homecare and detergent chemicals; textile chemicals; personal care and cosmetics ingredients; paints and coatings chemicals; construction chemicals; mining chemicals; oilfield chemicals; food and feed additives

**Services:** Diversified product portfolio in chemicals; local know-how and technical support in emerging markets; tailor-made warehousing; logistics/supply chain services; financial solutions

**Assets:** 50+ affiliates worldwide across 35+ countries; 140+ locations; 450,000+ square metres of warehouse space

**Trading sales:** 36%

13

**OMYA**  
2018 SALES: \$1.30BN  
(SWFR1.28BN)

Oftringen, Switzerland

[WWW.OMYA.COM](http://WWW.OMYA.COM)

**Vice president:** Peter Bigler

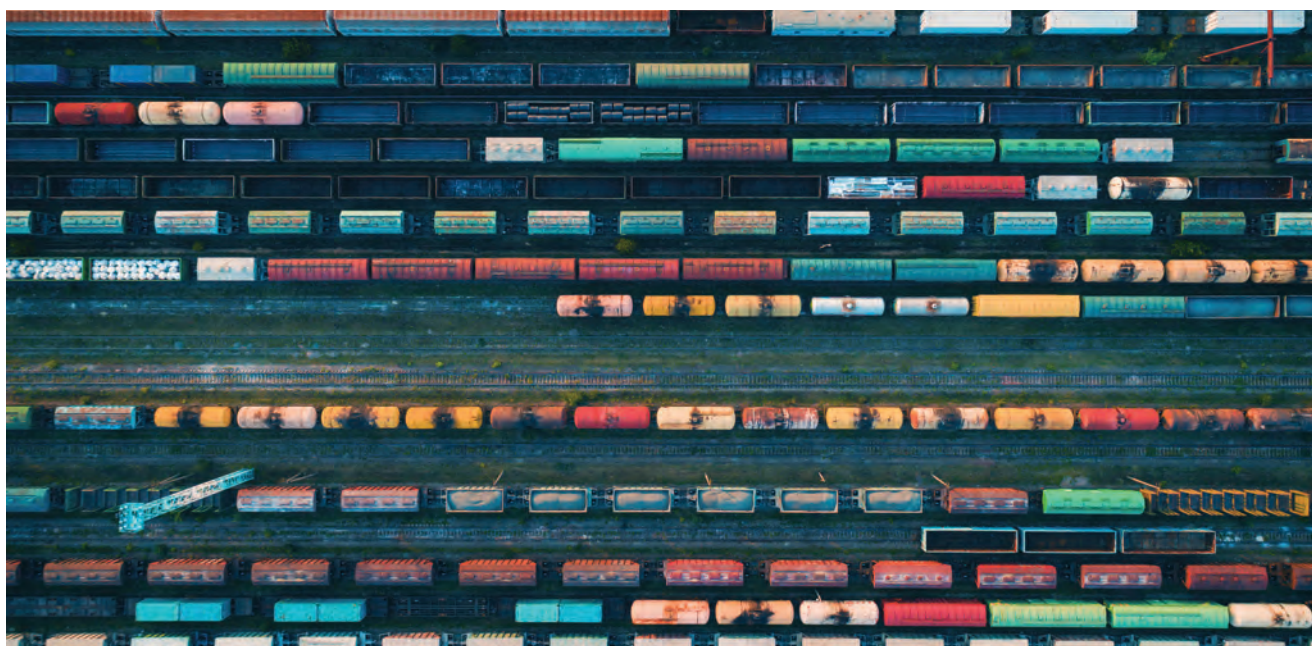
**Products:** Minerals and specialty chemicals

### ASIA PACIFIC CHEMICAL DISTRIBUTION LEADERS (2018 SALES)

| Company                               | Sales (\$m) | Company                             | Sales (\$m) | Company  | Sales (\$m) |
|---------------------------------------|-------------|-------------------------------------|-------------|--|-------------|
| 1 Sinochem Plastics                   | 3,040.0     | 29 Ravago Chemicals                 | 68.7        | 56 WISTEMA   | 7.0         |
| 2 Tricon Energy                       | 2,931.0     | 30 Connect Chemicals Group          | 51.9        | 57 2M Holdings   | 6.4         |
| 3 Brenntag                            | 1,584.9     | 31 Ramcharan                        | 49.0        | 58 Prakash Chemicals International                           | 6.1         |
| 4 Helm                                | 945.1       | 32 Nordmann, Rassmann               | 40.1        | 59 Indukern  | 5.9         |
| 5 Behn Meyer Group                    | 803.0       | 33 LEHVOSS Group                    | 35.5        | 60 Shamrock Shipping & Trading                               | 5.7         |
| 6 DKSH Holding*                       | 618.6       | 34 Aceto                            | 35.0        | 61 Cornelius Group   | 4.6         |
| 7 Redox                               | 517.0       | 35 McKinn International             | 34.2        | 62 Noahs Ark Chemicals                                       | 4.6         |
| 8 IMCD                                | 415.8       | 36 Eigenmann & Veronelli            | 32.1        | 63 Wego Chemical Group                                       | 4.0         |
| 9 Univar Solutions                    | 393.0       | 37 Norkem Holdings                  | 30.5        | 64 Taj Al Mulook   | 3.3         |
| 10 ICC Chemical                       | 372.4       | 38 Caldic                           | 28.6        | 65 LBB Specialties (includes Charkit Chemical Company & AIC) | 3.0         |
| 11 Pluschem EEIG                      | 350.0       | 39 Biesterfeld                      | 27.0        | 66 Group Barcelonesa   | 3.0         |
| 12 Jebson & Jessen Group              | 332.2       | 40 MONACHEM Group                   | 24.5        | 67 Solventis   | 3.0         |
| 13 Manuchar                           | 329.0       | 41 ECEM European Chemical Marketing | 22.6        | 68 Arkem Kimya   | 2.6         |
| 14 Pon Pure Chemicals Group           | 328.4       | 42 Neo Chemical                     | 21.4        | 69 Atlantic Chemicals Trading                                | 2.3         |
| 15 TOP Solvent                        | 305.0       | 43 SAFIC-ALCAN                      | 17.2        | 70 EMSA Tecnologia Quimica                                   | 2.3         |
| 16 Petrochem Middle East              | 254.9       | 44 CellMark Chemicals               | 16.7        | 71 Quimdis   | 2.3         |
| 17 Azelis                             | 254.3       | 45 EQUILEX                          | 16.3        | 72 Metafrax Trading International                            | 2.1         |
| 18 KPL International                  | 249.8       | 46 Saiper Chemicals                 | 15.4        | 73 M. Cassab   | 2.1         |
| 19 WWRC Holding                       | 208.0       | 47 Penpet Petrochemical Trading     | 13.7        | 74 Audiche Trading   | 2.0         |
| 20 Omya                               | 183.1       | 48 Novasol Chemicals Group          | 13.0        | 75 Hawkins   | 2.0         |
| 21 Union Petrochemical                | 99.0        | 49 PHT International                | 12.3        | 76 The Chemical Company                                      | 1.2         |
| 22 Transmare Chemie                   | 92.9        | 50 Bodo Moller Chemie               | 10.2        | 77 A. + E. Fischer-Chemie                                    | 1.1         |
| 23 Barentz International              | 86.4        | 51 Algol Chemicals                  | 10.0        | 78 Astro Chemicals   | 1.0         |
| 24 TER GROUP                          | 85.9        | 52 Marubeni Specialty Chemicals     | 10.0        | 79 Haefner   | 1.0         |
| 25 RAI Rakha Al Khaleej International | 80.0        | 53 Arpadis Benelux                  | 9.8         | 80 Harwick Standard Distribution                             | 1.0         |
| 26 Megachem                           | 75.2        | 54 Joss Elastomers                  | 8.0         | 81 Hubbard-Hall  | 1.0         |
| 27 Vikudha Overseas                   | 75.0        | 55 Rahn Group                       | 8.0         | 82 Solvadis Group  | 1.0         |
| 28 Maha Chemicals                     | 73.0        |                                     |             |  |             |

\*DKSH figures are based on industry estimates

NOTE: Sales are by region and may differ from the total sales figure in the main Top 100 listing. Table excludes companies that do not break out sales by geography



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

for polymers; decorative paints; industrial coatings; printing inks; adhesives and sealants; plasters and renders; construction chemicals; water and energy chemicals; agriculture and forestry chemicals; alu-finishing chemicals; printing and writing chemicals; packaging and ingredients for consumer goods

**Services:** Global marketing and sourcing; global supply chain management (logistics infrastructure, customer service); regulatory affairs management and services; R&D; technical service

**Assets:** R&D centre for surface science, mineral pigment, chemical engineering, microbiology and consumer goods; technical application service hubs in Europe, Americas and Asia Pacific; sales affiliates in more than 50 countries; global network of 70+ warehouses

### 14 BARENTZ INTERNATIONAL

2018 SALES: \$1.29BN

Amsterdam, Netherlands

[WWW.BARENTZ.COM](http://WWW.BARENTZ.COM)

**CEO:** Hidde van der Wal

**Products:** Starches; proteins; enzymes; hydrocolloids; vitamins; antioxidants; preservatives; emulsifiers; excipients; active ingredients; lanolin

**Services:** Blending; spray drying; mixing; encapsulating; testing; formulating

**Assets:** Spray dryers; liquid and powder mixers

**Trading sales:** 10%

### 15 PETROCHEM MIDDLE EAST

2018 SALES: \$1.25BN

Dubai, UAE

[WWW.PETROCHEM.COM](http://WWW.PETROCHEM.COM)

**CEO:** Yogesh Mehta

**Products:** Aromatics; alcohols; aldehydes; ketones; phenol; glycols; monomers; esters; methanol; caustic soda; plasticizers; polymers; pentaerythritol; phthalic anhydride

**Services:** Storage of bulk and drum chemicals; blending; trading commodities; packaging; providing tanks for leasing; logistics

**Assets:** Large state of the art terminal in Jebel Ali, Dubai, UAE, with 41 bulk chemical storage tanks, including drum storage for 25,000 drums and four drumming lines; modern tank terminal in Adabiya, Egypt storing bulk chemicals; 26 trailer trucks; 14 road tankers; storage and logistics terminal in Dammam, Saudi Arabia in partnership with Hoyer; offices in Singapore, Taiwan, China, India, Egypt, UK and Holland; head office in Dubai.

**Trading sales:** 43%

### 16 ICC CHEMICAL

2018 SALES: \$1.06BN

New York City, New York, US

[WWW.ICCCHEM.COM](http://WWW.ICCCHEM.COM)

**President:** Naveen Chandra

**Products:** PVC resin; acrylonitrile; alpha olefins; styrene; mixed xylene; acetone; isopropyl alcohol; MMA, n-paraffin; acetic acid; pygas; chloroform; 2-ethylhexanol; solvent C-9

**Services:** Packaging

**Assets:** 25 offices and representatives worldwide

**Trading sales:** 84%

### 17 QUIMIDROGA

2018 SALES: \$1.06BN (€929M)

Barcelona, Spain

[WWW.QUIMIDROGA.COM](http://WWW.QUIMIDROGA.COM)

**CEO:** Vicente Munoz

**Products:** Solvents; monomers; glycols and intermediates; fine chemicals and specialties; food and feed ingredients; agrochemicals and fertilizers; pharmaceutical ingredients; cosmetics ingredients; detergents chemicals; coatings materials; adhesives; paper chemicals; water treatment chemicals; resins; plastics; 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 packaged products and 12,000 cubic metres of liquids in 155 tanks; two regional sites for liquids and packaged solids; seven distribution centres; fully equipped quality control laboratory

**Trading sales:** 5%

### 18 CALDIC

2018 SALES: \$973.7M (€850M)

Rotterdam, Netherlands

[WWW.CALDIC.COM](http://WWW.CALDIC.COM)

**CEO:** Olav C. van Caldenborgh

**Products:** Food - bakery, savoury, sweet, nutrition, beverages; dairy ingredients such as hydrocolloids; creative sensory products; vitamins, minerals and nutraceuticals; preservatives, antioxidants and acids; processing aids; health and personal care ingredients such as specialty solvents, excipients, APIs; acids and alkalis; pigments; surfactants; industrial - specialty chemicals for coatings, constructions, plastics, water treatment; rubber markets such as specialty solvents; specialty polymers; pigments and dyes; hydrocarbon and water-based resins; emulsifiers; silicone water repellents and anti-foams; adsorbents and ion exchange resins; preservatives; plant-based solutions; elastomers and plasticizers

**Services:** Sourcing and procurement; production; supply chain; technical and formulation; regulatory

**Assets:** 23 entities with 45 sites comprising

offices, warehouses, production facilities, laboratories and innovation centres; blending; mixing, repackaging

### 19 JEBSEN & JESSEN GROUP

2018 SALES \$968M (€845M)

Bangkok, Thailand, and Hamburg, Germany

[WWW.INGREDIENTS.JJSEA.COM](http://WWW.INGREDIENTS.JJSEA.COM)

[WWW.JEBSEN-JESSEN.DE](http://WWW.JEBSEN-JESSEN.DE)

**Regional managing director/CEO, Jebesen & Jessen Ingredients:** Marc Deschamps

**Managing partner, Jebesen & Jessen Hamburg:** Fritz von der Schulenburg

**Products:** Plastics and rubber; food & nutrition health; feed additives; oil and gas; oil derivatives; bioethanol; pharmaceutical and personal care ingredients; home care specialties; adhesives; water treatment specialties; mining components; agrochemicals; modified starches; collagen and sweetener

**Services:** Sales & marketing; R&D application lab; import/export; regulatory affairs; warehousing; distribution; sourcing; factory audit; credit report; local currency financing

**Assets:** 24 offices worldwide; 15 warehouses; six laboratories; three regional innovation centres

### 20 TER GROUP

2018 SALES: \$960.0M (€838M)

Hamburg, Germany

[WWW.TERGROUPE.COM](http://WWW.TERGROUPE.COM)

**Managing shareholder:** Christian A Westphal

**Products:** Waxes; gum rosin; thermoplastic and thermoset polymers; adhesives; hotmelts; additives; polybutenes; SIS/SBS block copolymers; IIR rubber; caseine; amorphous polyalphaolefins; hydrocarbon resins; pigments; dyes; polyvinyl alcohol; food ingredients; fiberglass; vaseline

**Services:** Blending; packaging; storage; production

**Assets:** Numerous office buildings; warehouses; trucks

**Trading sales:** 25%

### 21 DKSH HOLDING

2018 SALES: \$951.7M (€830.8M FOR PERFORMANCE MATERIALS)

Zurich, Switzerland

[WWW.DKSH.COM/PM](http://WWW.DKSH.COM/PM)

**CEO:** Stefan P Butz

**Products:** Food and beverage ingredients; personal care and cosmetics ingredients; pharmaceutical ingredients; specialty chemicals

**Services:** Marketing and sales; logistics; blending and repackaging; after-sales services; sourcing services; innovation and formulation services; regulatory services

**Assets:** 40 innovation centres; 100 business locations; 35 distribution centres



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# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

**22** **OQEMA**  
2018 SALES: \$939.3M (€820M)

**Korschenbroich, Germany**

[WWW.OQEMA.COM](http://WWW.OQEMA.COM)

**CEO:** Peter Overlack; **Co-CEO:** Heinrich Eickmann; **CFO:** Sabine Moritz

**Products:** Adhesives and sealants; automotive and machinery chemicals; synthesis chemicals; construction chemicals; energy and electronics chemicals; personal care and industrial cleaning chemicals; lubricants; metal and surface treatment chemicals; paints and coatings materials; plastics and rubber chemicals; surface technology chemicals; print, packaging and paper chemicals; textile and leather chemicals; cosmetics and personal care ingredients; feed and food ingredients; flavours and fragrances; AdBlue; agricultural chemicals; water treatment chemicals

**Services:** Tailored logistics solutions; technical support; filling and repackaging; blending; dilution and mixing; distillation and recycling; tail end spend solutions

**Assets:** 40 locations; 50 warehouses; trucks; laboratories; workforce of 1,200 Europe-wide

**Trading sales:** 5%

**23** **BEHN MEYER GROUP**  
2018 SALES: \$882.1M (€770M)

**Hamburg, Germany**

[WWW.BEHNMEYER.COM](http://WWW.BEHNMEYER.COM)

**Products:** Fertilizers; crop protection chem-

icals; ingredients for food, personal care, home care and pharmaceuticals; feed additives; specialties for rubber and plastics; solutions for water treatment; petrochemicals; coatings ingredients; leather and textile chemicals; chemicals for process industries

**Services:** Technical sales and marketing; customer service; regulatory and risk management; innovation and formulation; laboratory testing; blending, tailoring and packaging; warehousing and logistics; supply chain management; omni-channel support; business development

**Assets:** Over 1,230 employees; offices and warehouses in 13 countries; 38 warehouse locations; production facilities in Malaysia, Thailand, Indonesia, Italy, Netherlands and US; laboratories in Malaysia, Indonesia, Thailand, Vietnam, Italy and Netherlands

**24** **RAVAGO CHEMICALS**  
2018 SALES: \$859.2M (€750M)

**Arendonk, Belgium**

[WWW.RAVAGOCHEMICALS.COM](http://WWW.RAVAGOCHEMICALS.COM)

**General manager, EMEA:** Filip Van Camfort;

**General manager, US:** Kevin Wettstein

**Products:** Industrial chemicals; coatings materials; PU and polymers; construction chemicals; asphalt chemicals; specialty chemicals; care chemicals; life science chemicals; performance chemicals; water treatment chemicals; base chemicals; solvents; inorganics; intermediates; plasticizers

**Services:** Technical expertise; warehousing; logistics; blending; repackaging; laboratory services

**Assets:** Network of warehouses (own and third party); blending facilities; laboratory facilities; feed premix plant

**Trading sales:** 10%

**25** **SAFIC-ALCAN**  
2018 SALES: \$687M

**Paris, France**

[WWW.SAFIC-ALCAN.COM](http://WWW.SAFIC-ALCAN.COM)

**CEO:** Philippe Combette; **CEO of Myrtill (holding co):** Martial Lecat

**Products:** Cosmetics ingredients; pharmaceutical ingredients; nutraceuticals; rubber; plastics; coatings; industrial specialties

**Services:** Blending; packaging

**Assets:** Nine state-of-the-art laboratories for cosmetics, coatings, rubber, pharmaceuticals and water treatment in France, UK, Netherlands, Italy, Turkey and China

**26** **HYDRITE CHEMICAL**  
2018 SALES: \$686M

**Brookfield, Wisconsin, US**

[WWW.HYDRITE.COM](http://WWW.HYDRITE.COM)

**CEO:** Paul Honkamp

**Products:** Chlor-alkali; foam control chemicals; food processing chemicals; liquid sulfites; pulp and paper chemicals; organics; inorganics; metal finishing chemicals; peracetic acid (PAA); solvents and wastewater





treatment chemicals

**Services:** Blending; manufacturing; solvent reclamation; hazardous waste removal; technical training and customer product research  
**Assets:** 12 locations; bulk storage of 15m gal; private fleet of trucks and professional drivers

### 27 SOLVADIS GROUP 2018 SALES: \$674.9M

Frankfurt, Germany

[WWW.SOLVADIS.COM](http://WWW.SOLVADIS.COM)

**CEO:** Andreas Weimann

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

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

**Assets:** 10 tank farms; two storage facilities/warehouses; one production facility

**Trading sales:** < 5 %

### 28 GTM HOLDINGS 2018 SALES: \$642M

Sao Paulo, Brazil

[WWW.GTMCHEMICALS.COM](http://WWW.GTMCHEMICALS.COM)

**CEO:** Jose Manuel Berges

**Products:** Specialty, performance and industrial chemicals; oilfield chemicals; coatings, inks, adhesives and sealants; elastomers; cosmetics ingredients; personal care ingredients; fragrances and flavours; pharmaceutical ingredients; agricultural chemicals; water treatment chemicals; food ingredients; animal feed ingredients; pulp and paper chemicals; mining chemicals; lubricants; household and industrial cleaning chemicals

**Services:** Product mixing and blending; formulation services; packaging; storage (bulk and packed warehousing); preparation of samples; chemical analysis; production of lubricants (automotive and industrial); labelling; stock control; logistics; just-in-time delivery; drum return handling; inventory management; technical support; waste management

**Assets:** 50 facilities throughout Latin America, including four owned maritime terminals; tank farms and blending units in all countries; 19 laboratories (product development, application technology, quality control)

### 29 HAWKINS 2018 SALES: \$550M

Roseville, Minnesota, US

[WWW.HAWKINSINC.COM](http://WWW.HAWKINSINC.COM)

**President and CEO:** Patrick Hawkins

**Products:** Caustic soda; bleach; minerals; lactates, sulphuric acid; hydrochloric acid; sodium citrate; vitamins; ferric/ferrous chloride; urea; chlorine

**Services:** Manufacturing; custom blending; packaging; private label; delivery

**Assets:** Seven industrial manufacturing facilities; 29 water treatment distribution warehouses; 125+ trucks; one nutraceutical manufacturing plant

**Trading sales:** 10%

### 30 NORDMANN, RASSMANN 2018 SALES: \$527M (€460M)

Hamburg, Germany

[WWW.NORDMANN.GLOBAL](http://WWW.NORDMANN.GLOBAL)

**Chairman and managing director:** Gerd Bergmann; **Managing directors:** Carsten Guntner, Felix Kruse

**Products:** Adhesives and sealants; composites materials; construction and coatings chemicals; contact lens, dental and medical materials; flame retardants; food additives; industrial chemicals and intermediates; lubricant additives; monomers; oleochemicals; personal care additives; pharmaceutical and nutraceutical ingredients; polyurethane chemicals; synthetic rubber and rubber chemicals; thermoplastics and polymer additives

**Services:** Laboratory services; studies and R&D; chemical synthesis and compounding; marketing and market intelligence; legislative and regulatory support; quality management and safety; global supply chain management; repackaging and refilling; sample service

**Assets:** Warehouses located all over Europe, Asia and North America

### 31 REDOX 2018 SALES: \$527M

Sydney, Australia

[WWW.REDOX.COM](http://WWW.REDOX.COM)

**Managing director and chairman:** Robert Coneliano

**Products:** More than 1,000 products serving over 140 industries; commodity and specialty chemicals; food ingredients; agricultural chemicals; household and personal care chemicals; mining chemicals; surface coatings; plastics additives; grease and lubricants; water treatment chemicals; building and construction chemicals; pharmaceutical ingredients

**Services:** Custom blending; dilutions; repackaging; bulk storage of powders, solvents, acids, alkalis; palletised storage; delivery

**Assets:** 12 regional sales offices; two manufacturing sites; seven owned and operated warehouses; more than 50 stock locations

### 32 INDUKERN 2018 SALES: \$508.3M (€443.7M)

Barcelona, Spain

[WWW.INDUKERN.COM](http://WWW.INDUKERN.COM)

[WWW.GRUPOINDUKERN.COM](http://WWW.GRUPOINDUKERN.COM)

**CEO:** Daniel Diaz-Varela

**Products:** Food ingredients; pharmaceutical ingredients; pharmaceutical APIs; flavour and fragrance ingredients; industrial chemicals; veterinary and animal nutrition ingredients

**Services:** Blending; packaging; storage; sales; handling of chemical products

**Assets:** 11 warehouses in Spain; subsidiaries

**Trading sales:** 8%

### 33 CG CHEMIKALIEN 2018 SALES: \$482.2M

Laatzen, Germany

[WWW.CG-CHEMIKALIEN.DE](http://WWW.CG-CHEMIKALIEN.DE)

**CEO:** Uwe Klass

**Products:** Organic and inorganic chemicals; solid matters; acid/alkaline solutions; solvents; specialties; food and feed ingredients; intermediates; pharmaceutical ingredients; cosmetics ingredients; paints and varnishes; water chemistry

**Services:** Storage; packaging; filling; blending; single sourcing; toll manufacturing; tank monitoring; application engineering consulting, manufacturing of paints/varnishes; GMP certification

**Assets:** Six warehouses; 100 trucks

**Trading sales:** 40%

### 34 QUADRA CHEMICALS 2018 SALES: \$473.2M

Vaudreuil-Dorion, Quebec, Canada

[WWW.QUADRACHEMICALS.COM](http://WWW.QUADRACHEMICALS.COM)

[WWW.QUADRAINGREDIENTS.COM](http://WWW.QUADRAINGREDIENTS.COM)

**CEO:** Tony Infilise

**Products:** Performance adhesives; flexible packaging; household, industrial and institutional cleaning chemicals; water treatment chemicals; mining and smelting chemicals; soluble fertilizer; pulp and paper chemicals; metal treatment and galvanizing chemicals; construction chemicals; coatings, adhesives, sealants and elastomers; pool and spa chemicals; oilfield chemicals; food and beverage ingredients; nutrition and nutraceutical ingredients; animal nutrition ingredients; health and wellness ingredients; pharmaceutical ingredients; cosmetics and fragrances ingredients; personal care ingredients

**Services:** Storage; packaging; blending

**Assets:** 16 locations including warehouses and tank farms

### 35 LEHVOSS GROUP 2018 SALES: \$438.7M (€383M)



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

### NORTH AMERICA CHEMICAL DISTRIBUTION LEADERS (2018 SALES)

| Company  | Sales (\$m) | Company   | Sales (\$m) | Company                             | Sales (\$m) |
|--|-------------|---|-------------|-------------------------------------|-------------|
| 1 Univar Solutions   | 6,260.0     | 47 TER Group  | 76.8        | 93 Seeler Industries                | 26.1        |
| 2 Brenntag   | 5,311.8     | 48 Callahan Chemical  | 75.0        | 94 JNS-Smithchem                    | 25.0        |
| 3 Tricon Energy  | 1,202.5     | 49 Chemical Solvents  | 75.0        | 95 Barentz International            | 24.9        |
| 4 IMCD   | 1,092.9     | 50 George S. Coyne Chemical   | 75.0        | 96 Atlantic Chemicals Trading       | 24.1        |
| 5 Helm   | 1,063.3     | 51 Connection Chemical  | 73.0        | 97 Seacole                          | 22.0        |
| 6 Azelis   | 882.1       | 52 Tennants Distribution  | 70.2        | 98 ECEM European Chemical Marketing | 21.4        |
| 7 Hydrite Chemical   | 686.0       | 53 Chemisphere  | 70.0        | 99 Connect Chemicals Group          | 21.2        |
| 8 Hawkins  | 543.0       | 54 Buckley Oil  | 67.0        | 100 DAXX                            | 21.0        |
| 9 Quadra Chemicals   | 473.2       | 55 Skyhawk Chemicals  | 66.9        | 101 Eagle Alcohol                   | 18.7        |
| 10 Maroon Group  | 425.0       | 56 SolvChem   | 66.2        | 102 Biesterfeld                     | 18.0        |
| 11 EMCO Chemical Distributors                                | 376.0       | 57 Brainerd Chemical  | 66.0        | 103 Schibley Solvents and Chemicals | 17.5        |
| 12 PVS Distribution Group                                    | 305.0       | 58 Astro Chemicals  | 62.0        | 104 EMCO-Inortech                   | 14.7        |
| 13 Wego Chemical Group                                       | 292.0       | 59 Walsh & Associates   | 60.6        | 105 LEHVOSS Group                   | 13.7        |
| 14 ICC Chemical  | 264.2       | 60 Petrochem Middle East  | 60.2        | 106 American Chemie                 | 13.2        |
| 15 Interstate Chemical                                       | 249.0       | 61 Dien   | 59.5        | 107 Classic Distributing Company    | 11.0        |
| 16 Superior Oil  | 234.0       | 62 Safic-Alcan  | 58.4        | 108 Custom Chemical Services        | 11.0        |
| 17 Ksolv Group   | 230.0       | 63 Hubbard-Hall   | 55.2        | 109 Brisco do Brasil                | 10.5        |
| 18 Aceto   | 225.0       | 64 TRInternational  | 53.5        | 110 Novasol Chemicals Group         | 10.0        |
| 19 Marubeni Specialty Chemicals                              | 215.0       | 65 Cambrian Solutions   | 53.5        | 111 Redox                           | 10.0        |
| 20 Caldic  | 206.2       | 66 Valudor Products   | 53.0        | 112 ChemCeed                        | 9.8         |
| 21 LBB Specialties (includes Charkit Chemical Company & AIC) | 206.0       | 67 Chem One   | 50.1        | 113 Audiche Trading                 | 9.6         |
| 22 ChemGroup   | 200.0       | 68 PHT International  | 48.8        | 114 Nordmann, Rassmann              | 9.2         |
| 23 Special Materials Company                                 | 192.0       | 69 McCullough & Associates  | 48.5        | 115 SMA Collaboratives              | 8.4         |
| 24 Barton Solvents   | 176.8       | 70 Ideal Chemical & Supply  | 45.8        | 116 Norkem Holdings                 | 8.1         |
| 25 The Plaza Group   | 176.0       | 71 FBC Chemical   | 45.5        | 117 Manuchar                        | 8.0         |
| 26 Pride Chemical Solutions                                  | 130.0       | 72 Coast Southwest  | 43.3        | 118 Snetor                          | 8.0         |
| 27 Haviland Enterprises                                      | 122.3       | 73 Van Horn, Metz & Co  | 43.0        | 119 KH Chemicals                    | 7.0         |
| 28 Omya  | 122.0       | 74 Chemical Distributors Inc (Buffalo, NY)                            | 42.2        | 120 Faravelli                       | 6.7         |
| 29 Sea-Land Chemical   | 117.5       | 75 Rahn Group   | 42.0        | 121 Solventis                       | 6.5         |
| 30 Essential Ingredients                                     | 114.4       | 76 Vivion   | 39.0        | 122 Behn Meyer Group                | 5.7         |
| 31 Ravago Chemicals  | 112.3       | 77 GJ Chemical  | 38.0        | 123 Sinochem Plastics               | 5.7         |
| 32 Tilley Chemical   | 109.0       | 78 Research Solutions Group   | 36.5        | 124 A. S. Paterson                  | 5.5         |
| 33 Harwick Standard Distribution                             | 103.0       | 79 Jebesen & Jessen Group   | 35.5        | 125 DutCH2                          | 4.6         |
| 34 Tanner Industries   | 102.7       | 80 BUFA Chemikalien Group   | 35.0        | 126 Arpadis Benelux                 | 3.7         |
| 35 Chemsolv  | 102.0       | 81 Independent Chemical   | 35.0        | 127 ProChema                        | 3.5         |
| 36 ClearTech Industries                                      | 100.0       | 82 Northspec Chemicals  | 35.0        | 128 Quimdis                         | 3.4         |
| 37 TRiISO  | 93.0        | 83 Acid Products  | 34.1        | 129 Prakash Chemicals International | 3.3         |
| 38 Mays Chemical   | 91.3        | 84 R.E. Carroll   | 33.0        | 130 Airedale Chemical               | 2.3         |
| 39 TCR Industries  | 88.0        | 85 Veckridge Chemical   | 33.0        | 131 HARKE Group                     | 2.2         |
| 40 Greenchem Industries                                      | 84.5        | 86 Radchem Products   | 32.1        | 132 Bodo Moller Chemie              | 2.1         |
| 41 Rowell Chemical   | 82.0        | 87 T.Z Group (including TZ Trading, Tau Chemicals Inc, Quimica Treza) | 30.6        | 133 Arkem Kimya                     | 2.0         |
| 42 The Chemical Company                                      | 81.5        | 88 Industrial Chemicals Corp  | 30.2        | 134 KPL International               | 1.9         |
| 43 Miles Chemical  | 80.5        | 89 SAL Chemical   | 29.8        | 135 Indukern                        | 1.3         |
| 44 Pluschem EEIG   | 80.0        | 90 Joss Elastomers  | 28.1        | 136 Monachem Group                  | 1.2         |
| 45 Webb Chemical Service                                     | 80.0        | 91 Metafrax Trading International                                     | 27.1        | 137 Cornelius Group                 | 1.2         |
| 46 CellMark Chemicals  | 78.0        | 92 Gulf Coast Chemical  | 26.3        | 138 Penpet Petrochemical Trading    | 1.1         |

NOTE: Sales are by region and may differ from the total sales figure in the main Top 100 listing. Table excludes companies that do not break out sales by geography

### Hamburg, Germany

[WWW.LEHVOSS.DE](http://WWW.LEHVOSS.DE)

**Managing partners:** Knut Breede, Soenke Thomsen, Thomas Oehmichen

**Products:** Customised polymer materials; masterbatches; pastes; magnesia; carbon black; rare earths; rheology modifiers; diatomaceous earths; cosmetics raw materials; nutraceutical ingredients; functional fluids; filter cartridges; rubber chemicals

**Services:** Repackaging; production of compounds, masterbatches, pastes and other; warehousing; logistics

**Assets:** Five production sites; seven own warehouses and several external warehouses; six laboratories

**Trading sales:** 30%

36

### MAROON GROUP

2018 SALES: \$425M

### Avon, Ohio, US

[WWW.MAROONGROUPLLC.COM](http://WWW.MAROONGROUPLLC.COM)

**CEO:** Terry Hill; President

**COO:** Mike McKenna

**Products:** Specialty additives; specialty resins; specialty pigments; specialty intermediates; specialty ingredients and packaging

**Services:** Custom blending; repackaging; micronisation; drumming; public warehousing; FDA and SQF storage; laboratory services; technical and formulary assistance; R&D

**Assets:** 130,000 square foot headquarters facility in Avon, Ohio; 170,000 square foot facility in Lincoln, Rhode Island and 37,000 square foot facility in Newark, New Jersey; additional 35 total warehouses in North America; seven company owned and operated trucks; six customer service centres

37

### ACETO

2018 SALES: \$415M

### Port Washington, New York, US

[WWW.ACETO.COM](http://WWW.ACETO.COM)

**CEO:** William Kennally

**Products:** Specialty chemicals; generic agricultural formulations; pharmaceutical intermediates; active pharmaceutical ingredients; nutritional products

**Services:** International sourcing; logistics and handling

**Trading sales:** 60%

38

### WEGO CHEMICAL GROUP

2018 SALES: \$395.5M

### Great Neck, New York, US

[WWW.WEGOCHEM.COM](http://WWW.WEGOCHEM.COM)

**Principal and president:** Bert Eshaghpour

**Products:** Agricultural chemicals; animal nutrition and feed ingredients; antifreeze and coolants; CASE; corrosion inhibitors;

lithium battery materials and electrolytes; lubricants and greases; pharmaceutical ingredients and fine chemicals; HI&I chemicals; flame retardants; food and beverage ingredients; metal working chemicals; finishing and flux chemicals; oilfield services chemicals; plastics additives; resins and rubber additives; pulp and paper chemicals; water treatment and pool chemicals

**Services:** Supply chain solutions; logistics; warehousing; outsourcing

**Assets:** 100+ worldwide professionals; 14 international offices; global distribution network of 50+ warehouses

**Trading sales:** 20%

39

### EMCO CHEMICAL DISTRIBUTORS

2018 SALES: \$376M

### Pleasant Prairie, Wisconsin, US

[WWW.EMCOCHEM.COM](http://WWW.EMCOCHEM.COM)

**President:** Edward Polen

**Products:** Acids and alkalis; additives; aliphatic and aromatic hydrocarbons; amines; carbonates; chelating agents; ester and ether esters; glycols; ketones; pigments; plasticizers; resins; silicones; surfactants; terpene and citrus solvents

**Services:** Blending and packaging; waste services; application laboratory services; warehousing; order fulfilment; USP and food grade packaging; private fleet delivery

**Assets:** three production facilities; six warehouses; 5,000 square foot CASE applications lab; 40 trucks; 85 trailers

40

### QUIMICA ANASTACIO

2018 SALES: \$374.9M

### Sao Paulo, Brazil

[WWW.QUIMICANASTACIO.COM.BR](http://WWW.QUIMICANASTACIO.COM.BR)

**CEO:** Jan Felix Krueder

**Products:** Cosmetics and personal care ingredients; pharmaceutical ingredients; flavours; animal health ingredients; agricultural chemicals; rubber; household and auto care chemicals; lubricants; plastics; polyurethanes; paints and coatings; resins and adhesives; food ingredients; feed ingredients; sports nutrition ingredients

**Services:** Storage; blending; packaging; bulk distribution; trading; cargo consolidation; dedicated procurement

**Assets:** Six warehouses

**Trading sales:** 14%

41

### VIKUDHA OVERSEAS

2018 SALES: \$357M

### Hong Kong, China

[WWW.VIKUDHA.COM](http://WWW.VIKUDHA.COM)

**CEOs:** Vikash Adukia, Deep Adukia

**Products:** Petrochemicals and polymers; agricultural and feed chemicals; cosmetics and per-

sonal care ingredients; detergents and home care chemicals; food and beverage ingredients; mining, oil and gas chemicals; paint and coatings ingredients; plastics additives; polyurethanes; rubber and paper chemicals; textiles and leather chemicals; water treatment chemicals

**Services:** Mixing; blending; formulation; product sourcing; market development; creative financial solutions; market intelligence; logistics expertise; shipping advisory and documentation

**Assets:** 18 offices worldwide; 300+ employees globally; multiple warehouses worldwide; formulation facility in Malaysia

**Trading sales:** 70%

42

### PON PURE CHEMICALS

2018 SALES: \$345.9M

### Chennai, Tamil Nadu, India

[WWW.PURE-CHEMICAL.COM](http://WWW.PURE-CHEMICAL.COM)

**CEO:** M Ponnuswami

**Products:** Acids and derivatives; aromatics; ketones; esters; ethers; chlorinated solvents; alcohols; aliphatic solvents; hydrocarbons; monomers; specialty chemicals; coatings and inks; plastics and composites; textile chemicals; leather and paper chemicals; sugar chemicals; water treatment chemicals; lubricants

**Services:** Small packaging; underground storage; technical service; custom blending; just-in-time delivery; transportation

**Assets:** 25 branches in India; five overseas branches; 23 warehouses across India (including seven explosive repackaging warehouses); leased terminal facilities

43

### EIGENMANN & VERONELLI

2018 SALES: \$343.7M (€300M)

### Rho, Milan, Italy

[WWW.EIGVER.COM](http://WWW.EIGVER.COM)

**CEO:** Ludovico Balbo di Vinadio

**Products:** Specialty chemicals for adhesives and sealants; animal nutrition and health ingredients; building chemicals; ecology and water treatment chemicals; food ingredients; home and industrial care chemicals; leather chemicals; lubricants and industrial auxiliaries; organic synthesis chemicals; paper chemicals; personal care chemicals; pharmaceutical ingredients; plastic additives; polyurethanes; rubber chemicals; surface coatings; textile chemicals

**Services:** Production including toll and third-party manufacturing; repackaging; warehousing

**Assets:** Two production plants; three warehouses

**Trading sales:** 15%

44

### POCHTECA MATERIAS PRIMAS

2018 SALES: \$336.5M

### Mexico City, Mexico

# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

[WWW.POCHTECA.COM.MX](http://WWW.POCHTECA.COM.MX)  
[WWW.POCHTECA-ENGLISH.COM](http://WWW.POCHTECA-ENGLISH.COM)

**Executive director:** Eugenio Manzano

**Products:** Inorganic chemicals; solvents and blends; food ingredients; chemical specialties; lubricants

**Services:** Blending; packaging, storage and logistics solutions; product application; product development; quality control

**Assets:** More than 299,000 square metres of logistics capacity; capacity to store 21.5m litres of liquids

### 45 CELLMARK CHEMICALS

2018 SALES: \$333.9M

**Gothenburg, Sweden**

[WWW.CELLMARK.COM](http://WWW.CELLMARK.COM)

**President, Chemicals:** Hugo Galletta;

**President, Basic chemicals:** Ersin Alkan

**Products:** Basic chemicals; lignosulfonates; caustic soda; semiconductor materials; renewable battery materials; oilfield chemicals; water treatment chemicals; coatings; agrochemicals; flame retardants; food and beverage ingredients; cosmetic and oral care ingredients; active pharmaceutical ingredients; organic chemicals; inorganic chemicals; specialty and fine chemicals

**Services:** Sales and marketing; sourcing; custom manufacturing; packaging; blending, milling and granulations; R&D; regulatory services; market research; logistics

**Assets:** Production equipment and inventory held at public warehouses in over 20 locations worldwide

**Trading sales:** Less than 30%

### 46 M. CASSAB

2018 SALES: \$318.8M

**Sao Paulo, Brazil**

[WWW.MCASSAB.COM.BR](http://WWW.MCASSAB.COM.BR)

**CEO:** Victor Cutait Neto

**Products:** Performance and specialty chemicals; polyurethane chemicals; paints and resins materials; construction chemicals; polymers additives; solvents; additives; silicones; pigments; monomers; emulsifiers; polyols; isocyanates; biocides; APIs and pharmaceutical excipients; home and personal care ingredients; veterinary products; feed and food premixes and ingredients; vitamins; amino acids

**Services:** Blending; packaging; storage; dilutions; technical applications laboratory services (polyurethanes, home and personal care, pharmaceuticals and food); full technical support; formulation

**Assets:** Three warehouses in Brazil; one warehouse in Argentina; four premix facilities for animal nutrition; one premix facility for food nutrition; physical, chemical and microbiological accredited ISO 17025 laboratory

### 47 PROTEA CHEMICALS

2018 SALES: \$315M

**Bryanston, Gauteng, South Africa**

[WWW.PROTEACHEMICALS.CO.ZA](http://WWW.PROTEACHEMICALS.CO.ZA)

[WWW.OMNIA.CO.ZA](http://WWW.OMNIA.CO.ZA)

**Managing director:** Funani Mojono

**Products:** Mining chemicals; agriculture and animal feeds; food ingredients including yeasts and enzymes for the wine industry;

coatings and solvents including adhesives and sealants; polymers and elastomers; industrial acids; oil and gas industry commodities and additives; water treatment commodities and specialties; chlor-alkali products including caustic soda and chlorine liquid gas; personal care and pharmaceutical chemicals; base oils and specialty additives.

**Services:** Break bulk; warehousing and distribution in South Africa and neighbouring territories; packaging to required smaller pack sizes; blending to proprietary recipe/formulation; manufacture of specific water treatment chemicals; emergency response; effluent treatment and safe disposal; customer facility installations and management of full supply chain; fully ISO and OHSAS accredited and signatory to CAIA Responsible Care

**Assets:** 16 physical locations in South Africa, Namibia, Kenya and Angola (over 40 hectares); over 50,000 square metres of warehouse space; fleet of over 80 delivery vehicles for liquid bulk and packed chemical distribution; over 30,000 cubic metres of bulk liquid chemical storage under management

**Trading sales:** 2%

### 48 TOP SOLVENT

2018 SALES: \$307.5M

**Bangkok, Thailand**

[WWW.TOPSOLENT.COM/EN](http://WWW.TOPSOLENT.COM/EN)

**CEO:** Acharee Tiyabhorn

**Products:** hydrocarbon solvents (hexane, pentane, SBP group, toluene, xylene, aromatic solvents, white spirits); chemical solvents (IPA, acetone, MEK, ethyl acetate, butyl ace-





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# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

tate); styrene; ethylene glycol (MEG/DEG); food ingredients; pharmaceutical ingredients; personal care ingredients; animal feed products; cleaning products

**Services:** Manufacturing of hydrocarbon solvent products; storage; drum filling; transportation; multi-delivery mode offerings (vessel, bulk truck, ISO Tank, drum); thinner blending

**Assets:** One hydrocarbon solvents manufacturing plant via subsidiary Sak Chaisidhi (SAKC); four tank terminals; 73 chemical storage tanks; six warehouses; loading and unloading facilities with both trucks, ISO tanks and vessels; drum filling station; laboratory (QC and technical); 51 bulk trucks (contracted); 39 pack trucks (contracted)

**Trading sales:** 1%

### 49 QUINTIA 2018 SALES: \$307M

**Buenos Aires, Argentina**

[WWW.QUINTIA.COM](http://WWW.QUINTIA.COM)

**President and CEO:** Diego Collard Bovy

**Products:** Mining chemical blends; water treatment chemicals; paper chemical blends; feed additives and specialties; feed premixes; feed vaccines; food blends; food flavours; food ingredients; basic industrial chemicals; plastic bags and sacks

**Services:** Packaging and storage; blending (feed and food premixes); dilutions; production (animal vaccines, flavours); applications consulting; quality control (company labs); total chemical management services at customer sites

**Assets:** 13 warehouses; eight laboratories (quality control, applications)

**Trading sales:** 2%

### 50 PVS DISTRIBUTION GROUP 2018 SALES: \$305M

**Detroit, Michigan, US**

[WWW.PVSCHEMICALS.COM](http://WWW.PVSCHEMICALS.COM)

**Chief operating officer:** Timothy F Nicholson

**Products:** Full line of chemicals; inorganic acids and bases; surfactants; solvents

**Services:** Packaging; packaging; storage; trucking; minibulk

**Assets:** Five warehouses; company-owned fleet of box vans and bulk trailers; network of terminals

**Trading sales:** 2%

### 51 TELKO 2018 SALES: \$304.7M (€266M)

**Espoo, Finland**

[WWW.TELKO.COM](http://WWW.TELKO.COM)

**CEO:** Kalle Kettunen

**Products:** Engineering plastics; automotive chemicals; paints and coatings; personal care ingredients; packaging; construction chemicals; additives; mining chemicals

**Services:** Blending; packaging; tailor-made products; sourcing services; materials consulting

### 52 ECEM EUROPEAN CHEMICAL MARKETING 2018 SALES: \$287.1M

**Amsterdam, Netherlands**

[WWW.ECEM.COM](http://WWW.ECEM.COM)

**CEO:** Barend Barendse

**Products:** Acrylates and methacrylates; hydroxy monomers; 150 special monomers; anhydrides; phosphonates; water treatment chemicals; polyurethanes; food and feed ingredients; pharmaceutical ingredients; coatings resins and polymers; adhesives and sealants; water treatment chemicals; isocyanates TDI and MDI for polyurethanes

**Services:** One-stop shopping; global supply chain service; consignment stocks; fully REACH registered in EU; bulk storage and warehousing; drumming installation; blending; returnable IBCs; over 100 products in stock; local storage in several countries

**Assets:** eight own ISO Tanks for dedicated bulk transport; over 100 returnable (custom tailored) stainless steel IBCs; over 70 professional staff in sales and logistics and workers at several terminals and warehouse operations; sales offices in Brazil, Japan, China, US and EU

**Trading sales:** 4%

### 53 KRAHN CHEMIE 2018 SALES: \$284.1M (€248M)

**Hamburg, Germany**

[WWW.KRAHN.EU](http://WWW.KRAHN.EU)

**Managing directors:** Dr. Rolf Kuropka, Axel Sebbesse

**Products:** Coating ingredients (additives, rheology modifiers, pigments and colourants, resins, biocides, film consolidation agents); construction chemicals (additives, pigments, fillers, rheology modifiers); adhesives ingredients (resins, plasticizers, additives, bonding agents); plastic ingredients (additives, plasticizers, flame retardants), rubber ingredients (synthetic rubber, adhesion promoters, mould release agents); ceramic powders (zirconia, alumina); lubricant ingredients (base oils, additives and additive packages); heat transfer fluids

**Services:** Technical sales and marketing support; application development; laboratory analysis; colorimetry and colour matching service; formulation advice; warehousing and logistics solutions; mixing and blending; repackaging; sampling service; legislative and regulatory support

**Assets:** Two technology centres

### 54 NORKEM HOLDINGS 2018 SALES: \$276M

**Knutsford, Cheshire, UK**

[WWW.NORKEM.COM](http://WWW.NORKEM.COM)

**Group managing director:** A Nicholson

**Products:** Iodine and iodine salts; zinc oxide and zinc salts; manganese compounds; copper salts; barium carbonate; citric acid; potassium carbonate and hydroxide; food chemicals; pharmaceutical intermediates; feed chemicals

**Services:** Blending; packaging; manufacturing; liquid suspensions; liquid solutions

**Assets:** 12 locations worldwide

### 55 CONNECT CHEMICALS GROUP 2018 SALES: \$265M

**Ratingen, Germany**

[WWW.CONNECTCHEMICALS.COM](http://WWW.CONNECTCHEMICALS.COM)

**CEOs:** Basar Karaca, Dirk Otmar

**Products:** Paper chemicals; lubricants and metal-working fluids; cosmetics and personal care ingredients; water treatment chemicals; household and industrial care chemicals; coatings, adhesives and sealants; plastics

**Services:** Custom manufacturing; blending; storage; sourcing

**Trading sales:** 100%

### 56 SOLVENTIS 2018 SALES: \$264.3M (€230.7M)

**Guildford Surrey, UK**

[WWW.SOLVENTIS.NET](http://WWW.SOLVENTIS.NET)

**CEO:** David Lubbock;

**Managing director:** Nick Johnson

**Products:** Alcohols; antifreeze; brake fluids; acetate esters; glycols; glycol ethers; hydrocarbons; ketones; monomers; propylene glycol ethers; white oils; airplane de-icers

**Services:** Importing of bulk chemicals; global bulk and drum distribution and blending of automotive products; Antwerp storage terminal with drumming and blending facilities; UK storage and blending facility

### 57 RAI RAKHA AL KHALEEL INTERNATIONAL 2018 SALES: \$260M

**Dubai, UAE**

[WWW.RAI-UAE.COM](http://WWW.RAI-UAE.COM)

**CEO:** Henry F Roth

**Products:** Polymers (PE, PP, ETP, PVC); masterbatches and fillers

**Services:** Trading

**Assets:** Four owned warehouses; others on lease

**Trading sales:** 25%

### 58 KPL INTERNATIONAL 2018 SALES \$258.7M (INR 18,009M)

**New Delhi, India**

### WWW.KPLINTL.COM

**Managing director:** Surinder Kumar Kak  
**Products:** Bulk and essential chemicals; polymers; paper and allied chemicals; specialty chemicals; paint & coating chemicals; industrial and specialty gases; engineering consumables; Darjeeling teas

**Services:** Development of markets for new products and applications; investment in value-added services like repackaging facilities for greater market coverage; providing continuous market intelligence, technical and after-sales support; sourcing; exports; procurement and auditing services; KPL sources and exports products from India, China and Middle East countries to international markets; repackaging services; warehousing and logistics services; facilitating technical support from group companies for quality control, testing and plant audits

**Assets:** Seven warehouses; two bottling facilities for refrigerant and industrial gases; eight wind turbines with generation capacity of 15.35 MW

**Trading sales:** 25.43%

### 59 TENNANTS DISTRIBUTION 2018 SALES: \$257.8M (£202M)

#### WWW.TENNANTS DISTRIBUTION.COM

**Chairman:** Andrew Mitchell

**Managing director:** Tim Griffiths

**Products:** Acids and alkalis; animal feed raw materials; fatty acids, alcohols and esters; food ingredients and flavours; fragrances; general chemicals; Greenox AdBlue; personal care ingredients; pharmaceutical products; resins; solvents; specialty products; surfactants; water treatment chemicals; white oils and petroleum jelly

**Services:** Warehousing and storage; repackaging; blending; formulating; relabelling

**Assets:** 20 sites (including warehousing and storage); own vehicles

**Trading sales:** 2%

### 60 KTM 2018 SALES \$257M

**Istanbul, Turkey**

**WWW.KTM.COM.TR/EN/**

**CEO:** Keyan Zulfikari

**Products:** Polymers; oxo alcohols; solvents; alcohols; acrylates; plasticizers; monomers, rubber and rubber chemicals; polyurethane raw materials; TiO<sub>2</sub>; organic and inorganic chemicals

**Services:** International marketing; distribution; logistics; packaging; storage; inventory management; VMI and JIT; blending, financing, risk management

**Assets:** Pan-European coverage and offices; shore tanks and bulk storage facilities; nu-

merous warehouses covering Europe and Turkey; truck fleet and road tankers.

**Trading sales:** 25%

### 61 INTERSTATE CHEMICAL 2018 SALES: \$249M

**Hermitage, Pennsylvania, US**

**WWW.INTERSTATECHEMICAL.COM**

**President and CEO:** Albert R Puntureri

**Products:** Alcohols; glycols; ketones; caustic soda; thermal fluids; catalysts; plasticizers; resins; various solvents

**Services:** Manufacturing; blending; toll manufacturing; packaging; storage

**Assets:** Two manufacturing facilities; eight distribution facilities; two river terminals; 200 trucks

### 62 ARKEM KIMYA 2018 SALES: \$248M

**Istanbul, Turkey**

**WWW.ARKEM.COM**

**Chairman and CEO:** Levend Kokuludag

**Products:** Monomers; hydrocarbon solvents; alcohols; ketones; esters; glycols; glycol ethers; chlorinated solvents; oleochemicals; specialty chemicals; cosmetics; pharmaceuticals; food ingredients; surfactants; plastics

**Services:** Sales and marketing; blending; formulating; drumming; packaging; labelling and storage

**Assets:** One deep-sea tank terminal; logistics company with 75 transport units and 600 ISO tank containers; four warehouses

**Trading sales:** 3%

### 63 SOLVOCHEM HOLDINGS 2018 SALES: \$245M

**Limassol, Cyprus**

**WWW.SOLVOCHEM.COM**

**Chairman:** Anthony Joseph Flouty

**Products:** Solvents and chemicals; plastic; additives; plasticizers; urethanes and mining products

**Services:** Storage; blending; packaging

**Assets:** Seven trucks; 11 warehouses; 93 tanks

**Trading sales:** 40%

### 64 SUPERIOR OIL 2018 SALES: \$234M

**Indianapolis, Indiana, US**

**WWW.SUPERIOROIL.COM**

**President:** Kurt Hettinga

**Products:** Solvents; water-based cleaners; paint pre-treatment products; paint purge; thinners; heat transfer fluids; pressroom chemicals; fibreglass reinforcements; resins; catalysts; gel coats; corrosion inhibitors; sur-

factants; plasticizers

**Services:** Solvent recycling; blending; custom manufacturing; private labelling; waste disposal; acetone replacement systems; vendor-managed inventory; regulatory consulting; bulk and package delivery

**Assets:** Eight full-service locations; 55 trucks; 150 trailers; 250 bulk tanks; 55 blend tanks

### 65 BUFA CHEMIKALIEN GROUP 2018 SALES: \$230M

**Hude-Altmoorhausen, Germany**

**WWW.BUEFA.DE**

**CEO:** Ronald Ijzer

**Products:** Ethanolamines, ethylene glycol ethers, ethylene glycols, polyethylene glycols, propylene glycol ethers, propylene glycol, isopropyl alcohol, propionic acid, formic acid, caustic soda, solvents, aromatics, styrene, surfactants, oxo alcohols

**Services:** Formulating, warehousing, filling and bottling, blending, logistics, drumming

**Assets:** Six warehouses, 14 trucks

**Trading sales:** 30%

### 66 KSOLV GROUP 2018 SALES: \$230M

**Houston, Texas, US**

**WWW.KSOLV.COM**

**Owner/CEO:** Russ Allen

**Products:** Aliphatic solvents; aromatic solvents; alcohols; glycols; glycol ethers; acetates; chlorinated solvents; ketones; base oils; white oils; acids

**Services:** Chemical distribution; chemical packaging; chemical blending; chemical laboratory; maritime services; emergency spill response; disaster response; industrial services; waste management; transportation

**Assets:** Tote and drum warehouse tank farm; flare; nitrogen access; dock

### 67 MARUBENI SPECIALTY CHEMICALS 2018 SALES: \$229M

**White Plains, New York, US**

**WWW.MARUBENISCI.COM**

**President:** Jo Harada

**Services:** Paper chemicals; agricultural chemicals; plastics additives; automotive chemicals; packaging film

**Assets:** Furniture and fixtures; leasehold improvements

### 68 DONAUCHEM 2018 SALES: \$226.8M (€198M)

**Vienna, Austria**

**WWW.DONAUCHEM.COM**

**CEO:** Bogdan Banaszczyk



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

**Products:** Commodity and specialty chemicals; food ingredients; pharmaceutical ingredients; paint and construction chemicals; cosmetics and detergents ingredients; metal treatment chemicals; printing chemicals; water treatment chemicals; customer specific compositions

**Services:** Mixing; blending; environmentally friendly consultancy and planning; technical consultancy; training sessions on safety and the law; waste disposal; consultancy on chemical law and Reach

**Assets:** 12 warehouses

**Trading sales:** 20%

### 69 GAMMA CHIMICA 2018 SALES: \$222.1M (€193.9M)

**Lainate, Milan, Italy**

[WWW.GAMMACHIMICA.IT](http://WWW.GAMMACHIMICA.IT)

**President:** Giuseppe Mearini

**Products:** Glycols; ethanolamines; fatty acids; intermediates; solvents; antifreeze; glycerine; sequestering agents

**Services:** Storage; packaging; blending; anti-freeze production

**Assets:** Head office; warehouse of 54,000 square metres

### 70 LBB SPECIALTIES (INCLUDES CHARKIT CHEMICAL, AIC ) 2018 SALES: \$215M

**New York City, New York, US**

[WWW.LBBSPECIALTIES.COM](http://WWW.LBBSPECIALTIES.COM)

**President and CEO:** Charles Hinnant

**Products:** Personal care ingredients; nutritional ingredients; biotech chemicals; food ingredients; pharmaceutical ingredients; plastics additives; water/metal treatment chemicals; flavors and fragrances, nutraceuticals; electronic chemicals; industrial chemicals; plastics; veterinary chemicals; concrete chemicals; medical devices

**Services:** Warehousing; blending; packaging; custom/contract manufacturing; custom synthesis; product development

**Assets:** 69 stocking locations in North America

### 71 METAFRAX TRADING INTERNATIONAL 2018 SALES: \$211.9M (€185M)

**Lugano, Switzerland**

[WWW.METADYNEATRADING.COM](http://WWW.METADYNEATRADING.COM)

**President:** Ralph Theuer; **Director:** Alexander Maksimov

**Products:** Methanol; hexamine (urotropine); micronized hexamine; pentaerythritol; micronized pentaerythritol; dipentaerythritol; wax polymer compounds; polycarbonate; melamine; paraformaldehyde; phthalic anhydride

**Services:** Storage of liquid and solid chemicals; transshipment; blending; toll manufacturing; warehousing; packaging; delivery by vessel, rail, container, truck and silo-truck

**Assets:** Head office in Switzerland; branch office in Austria; three manufacturing/warehousing sites; third-party warehouses

**Trading sales:** 10%

### 72 HSH CHEMIE 2018 SALES: \$208.5M (€182M)

**Hamburg, Germany**

[WWW.HSH-CHEMIE.COM](http://WWW.HSH-CHEMIE.COM)

**Executives:** Stephan P Lohden, Frank Raabe, Stefan Rather

**Products:** Specialty chemicals for coatings, adhesives and building products; personal and home care ingredients; food, feed and pharmaceutical ingredients; plastics and rubber additives; industrial performance chemicals

**Services:** Technical consultancy; formulation advice; storage and logistics; sampling; financing; full compliance support; full marketing support

**Assets:** 12 sales office locations in central and eastern Europe

**Trading sales:** 10%

### 73 ORKILA 2018 SALES: \$208M

**Beirut, Lebanon**

[WWW.ORKILA.COM](http://WWW.ORKILA.COM)

**Chairman and CEO:** Antoine Sacy

**Products:** Specialty chemicals; pharmaceutical ingredients; agrochemicals; animal nutrition ingredients; personal care ingredients; performance products; paints and construction chemicals; oilfield chemicals; plastics additives; home care chemicals; water treatment chemicals

**Services:** Sales and marketing covering 60 countries; centralised purchasing and consolidated shipment; local currency invoicing; application laboratory services; local technical support; in-house market data collection and analysis

**Assets:** 18 regional centres and more than 45 warehouses; a European hub based in Rotterdam; technically qualified sales force; ISO 9001:2015 and GDP certifications

### 74 WWRC HOLDING 2018 SALES: \$208M

**Singapore**

[WWW.WWRC.COM](http://WWW.WWRC.COM)

**CEO:** Teoh Weng Chai

**Products:** Resins and intermediates; additives and catalysts; pigments, fillers and extenders; other chemicals and solvents; grinding media

**Services:** Technical service; storage; delivery

**Assets:** Eight warehouses



### 75 BANDEIRANTE QUIMICA 2018 SALES: \$207.9M

**Sao Paulo, Brazil**

[WWW.BBQUIMICA.COM.BR](http://WWW.BBQUIMICA.COM.BR)

**CEO:** Carlos Eduardo Marin

**Products:** Aromatics; aliphatic solvents; oxygenated solvents; ethanolamines; titanium dioxide (TiO<sub>2</sub>); surfactants; specialty resins; carbon black; tailor-made blends; UV monomers/oligomers; household and personal care chemicals; silicas; amines; agricultural chemicals; epoxy resins; glycols; mining chemicals

**Services:** Blending; agency sales (indent sales); formulation; technical assistance; storage; packaging

**Assets:** Six branches; 95 tanks; three warehouses; truck fleet; two laboratories; 2,000 IBCs

### 76 UNITED TRADING SYSTEM (UTS/ETC) 2018 SALES: \$201M

**St Petersburg, Russia**

[WWW.UTSRUS.COM](http://WWW.UTSRUS.COM)

**Managing director UTS:** Lars Hjorth;

**Managing director ETC:** Andrey Shkola

**Products:** Paints and coatings chemicals;



dry mixture and construction chemicals; plastics and polymer additives; rubber chemicals; resins and chemicals for composites; fibres; chemicals for detergents; cosmetics and household chemicals; oilfield, lubricant and refinery additives and chemicals; food additives; specialties and basic chemicals; pharmaceutical raw materials; agricultural chemicals

**Services:** Storage; mixing/blending; laboratory services; technical support; developing certification

**Assets:** 12 offices; 12 warehouses; seven laboratories; 451 employees

### 77 GRUPO RNM 2018 SALES: \$200.9M

**Famalicao, Portugal**  
[WWW.GRUPORN.MPT](http://WWW.GRUPORN.MPT)

**CEO:** Ricardo Machado

**Products:** Caustic soda; hydrogen peroxide; sulphuric acid; hydrochloric acid; sodium hypochlorite; plastics (PE, PP, PVC, PS, PET, EVA); solvents; specialties; glycols; propylene glycol; glycol ethers; surfactants; silicones; methanol; epoxy resins; inorganics

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

made packaging; stock control and telemetry; logistics operations consulting

**Assets:** Logistics complex; five tank terminals for liquids; 55 trucks; 50 cisterns; six semi-trailers; 65 ISO tank containers

**Trading sales:** 10%

### 78 CHEMGROUP 2018 SALES: \$200M

**Fairfield, Ohio, US**  
[WWW.CHEMGROUP.COM](http://WWW.CHEMGROUP.COM)

**President:** Marty Wehr

**Products:** Acids; alkalis; hydrogen peroxide; sodium hypochlorite; solvents and intermediates; glycols; glycol ethers; amines; surfactants; alcohols; water treatment chemicals; nitrogen products; white oils; borates; lime and specialty chemicals; gas-to-liquid (GTL) fluids and solvents

**Services:** Chemical and inventory management; blending; warehousing; technical and safety training; customised billing

**Assets:** 10 warehouses with over 420,000 square feet; over 2m gal bulk storage; 26 tractors; 16 straight trucks; 36 trailers; 12 tankers

### 79 CHEMPARTNERS 2018 SALES: \$196.5M

**Moscow, Russia**

[WWW.PROPARTNERS.RU](http://WWW.PROPARTNERS.RU)

**CEOs:** Gaurav Sood, Constantin Rzaev

**Products:** Plastics; polyolefins; polyurethanes; steel; MCAA; disinfection chemicals; pulp and paper chemicals; animal feed; synthetic fibres; oil drilling chemicals; hydraulic fracturing chemicals; flexible packaging; chemicals for crude transportation; rubber and tyres; mining chemicals

**Services:** Blending; packaging; vendor managed inventory; international logistics; local logistics; sourcing services; surveying services; market research; agro trading; learning centre

**Assets:** 24 warehouses; one office space

**Trading sales:** 13%

### 80 BANG & BONSOMER 2018 SALES: \$194.7M (€170M)

**Helsinki, Finland**  
[WWW.BANGBONSOMER.COM](http://WWW.BANGBONSOMER.COM)

**CEO:** Mikko Teittinen

**Products:** Coatings and construction chemicals; food ingredients; personal and home care ingredients; packaging and plastics additives; composites and polyurethanes, polymer materials

**Services:** Process chemistry solutions with engineering, remote control and digitisation; manufacturing of industry intermediate products and functional blends; application laboratory services; R&D and formulations; blending; dissolving; packaging; warehousing, logistics

**Assets:** One R&D centre; six application laboratories and technical centres; five manufacturing sites; 15 warehouses

### 81 SPECIAL MATERIALS COMPANY 2018 SALES: \$192M

**New York, US**  
[WWW.SMC-GLOBAL.COM](http://WWW.SMC-GLOBAL.COM)

**CEO:** Adam Feldman

**Products:** Specialty solvents; paints and coatings additives; oilfield chemicals; phosphorus derivatives; water treatment chemicals; biocides; friction reducers; electronic chemicals; mining chemicals; flame retardants; textile additives; photo imaging chemicals; PCBTF; sodium hypophosphite; glutaraldehyde; scale and corrosion inhibitors

**Services:** Custom blending; relabelling; solution adjustments; neutralisation reactions; conversions; dilutions; storage; warehousing; bulk storage; consignment inventory; just-in-time delivery; third-party warehousing; technical sales and support; regulatory affairs expertise

**Assets:** Five global production sites; 15 warehouses; truck fleet

# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

### 82 THE PLAZA GROUP 2018 SALES: \$184M

Houston, Texas, US

[WWW.THEPLAZAGRP.COM](http://WWW.THEPLAZAGRP.COM)

**President:** Randy Velarde

**Products:** Solvents; intermediates; elastomers; styrenics; polyethylenes; agricultural chemicals; lignosulfonates

**Services:** Marketing; logistics; storage

**Assets:** One warehouse; one bulk storage tank; 101 railcars

### 83 TRANSMARE CHEMIE 2018 SALES: \$183.5M

Antwerp, Belgium

[WWW.TRANSMARE.COM](http://WWW.TRANSMARE.COM)

[WWW.TRANSMARE-CHEMIE.COM](http://WWW.TRANSMARE-CHEMIE.COM)

**CEO:** Patrick Van Ende

**Products:** Chemicals and blends for the oil and gas industry; fine chemicals for health, personal and home care; food and feed ingredients; industrial and high purity solvents; chemicals and pigments for paints and adhesives; reference fuels; plastics additives

**Services:** Personalised blends and formulation support; drumming and packaging

**Assets:** 11 warehouses; Class 2 storage facilities

**Trading sales:** 50%

### 84 IMPAG 2018 SALES: \$180.0M (€150M)

Zurich, Switzerland

[WWW.IMPAG.COM](http://WWW.IMPAG.COM), [IMPAG.CH](http://IMPAG.CH)

**CEO:** Remo Bernardi

**Products:** Coatings additives; anhydrides; acrylates; polyols; flame retardants; polyurethanes; green solvents; detergents; base chemicals; cosmetics functionals and active ingredients; food ingredients; pharmaceutical APIs; metals; oleochemicals

**Services:** Global logistics; global sourcing; storage; application laboratory services; technical support; regulatory support; financing; packaging

**Assets:** Six sales offices across Europe; one tank farm for liquid goods; own application laboratory

**Trading sales:** 20%

### 85 BARTON SOLVENTS 2018 SALES: \$176.8M

Des Moines, Iowa US

[WWW.BARSOL.COM](http://WWW.BARSOL.COM)

**President:** David M Casten

**Products:** Aliphatics; aromatics; alcohols; glycol ethers; acetates; ketones; glycols; epoxy resins; surfactants; distilled spirits; specialty chemicals; USP/NF pharmaceutical ingredients; oils; lubricants

**Services:** Custom packaging; custom blend-

ing; delivery to customer or job site; waste services; laboratory services

**Assets:** Six stocking locations; delivery fleet

### 86 HAEFFNER 2018 SALES: \$170M

Asperg, Stuttgart, Germany

[WWW.HAEFFNERGROUP.COM](http://WWW.HAEFFNERGROUP.COM)

**CEOs:** Jurgen Martin; Thomas Dassler

**Products:** Water treatment chemicals; paints, inks, coatings, adhesives and resins additives; paint, textile and leather auxiliaries; food additives; feed additives; metal treatment chemicals; household and personal care ingredients; lubricant additives

**Services:** Mixing; blending and formulating; repackaging; contract packaging; warehous-

ing of hazardous goods; just-in-time delivery; applications advice; single sourcing

**Assets:** Six warehouse facilities; tank farm; HACCP filling and blending area; one laboratory; 30 trucks

**Trading sales:** 10%

### 87 2M HOLDINGS 2018 SALES: \$164.4M (£128.9M)

Runcom, UK

[WWW.2M-HOLDINGS.COM](http://WWW.2M-HOLDINGS.COM)

**CEO:** Mottie Kessler

**Products:** Triklone LE (aerospace); Perklone EXT (oil refinery/catalyst grade); MEC Prime (pharmaceutical grade); surfactants/rheology modifiers; AdBlue (emission reduction); aerospace approved products; Pigmentan (anti-

#### MIDDLE EAST/AFRICA CHEMICAL DISTRIBUTION LEADERS (2018 SALES)

| Company                                   | Sales (\$m) | Company                             | Sales (\$m) |
|---|-------------|-------------------------------------|-------------|
| 1 Snetor                                  | 856.0       | 36 Azelis                           | 14.9        |
| 2 Petrochem Middle East                   | 794.3       | 37 ECEM European Chemical Marketing | 14.6        |
| 3 Pluschem EEIG                           | 750.0       | 38 Grupo RNM                        | 13.1        |
| 4 Tricon Energy                           | 647.2       | 39 Sinochem Plastics                | 12.0        |
| 5 Protea Chemicals                        | 313.4       | 40 Quimdis                          | 11.5        |
| 6 Solvochem Holdings                      | 245.0       | 41 Ricardo Molina Group             | 11.2        |
| 7 Manuchar                                | 215.0       | 42 BUFA Chemikalien Group           | 11.0        |
| 8 Orkila                                  | 208.0       | 43 Arpadis Benelux                  | 10.3        |
| 9 Vikudha Overseas                        | 171.0       | 44 Grolman Group                    | 9.6         |
| 10 Ravago Chemicals                       | 120.3       | 45 Barentz International            | 9.5         |
| 11 RAI Rakha Al Khaleej International     | 120.0       | 46 Indukern                         | 9.5         |
| 12 Quimidroga                             | 113.4       | 47 Group Barcelonesa                | 7.4         |
| 13 ICC Chemical                           | 99.8        | 48 Unipex                           | 7.4         |
| 14 Taj Al Mulook                          | 88.9        | 49 EMSA Tecnologia Quimica          | 6.9         |
| 15 Afriglobal Commodities                 | 83.0        | 50 DutCH2                           | 6.0         |
| 16 Transmare Chemie                       | 82.8        | 51 Rahn Group                       | 5.0         |
| 17 Al Nahda International (Anichem Group) | 79.3        | 52 Megachem                         | 4.7         |
| 18 CellMark Chemicals                     | 74.0        | 53 Airedale Chemical                | 4.6         |
| 19 Prakash Chemicals International        | 53.8        | 54 Noahs Ark Chemicals              | 4.6         |
| 20 Shamrock Shipping & Trading            | 50.7        | 55 Penpet Petrochemical Trading     | 4.6         |
| 21 Solvadis Group                         | 47.7        | 56 Proquibasa                       | 4.6         |
| 22 Biesterfeld                            | 43.0        | 57 Joss Elastomers                  | 4.0         |
| 23 Omya                                   | 40.7        | 58 Matrix Chemie                    | 3.8         |
| 24 Linkers Chemicals & Polymers           | 38.3        | 59 CG Chemikalien                   | 3.8         |
| 25 Metafrax Trading International         | 36.1        | 60 2M Holdings                      | 3.4         |
| 26 Jebsen & Jessen Group                  | 29.8        | 61 KPL International                | 2.8         |
| 27 Venus Chemicals Group                  | 29.0        | 62 TOP Solvent                      | 2.5         |
| 28 Helm                                   | 28.6        | 63 ProChema                         | 2.0         |
| 29 Bodo Moller Chemie                     | 28.0        | 64 A.+ E. Fischer-Chemie            | 1.1         |
| 30 KH Chemicals                           | 26.5        | 65 Atlantic Chemicals Trading       | 1.1         |
| 31 Norkem Holdings                        | 24.0        | 66 Will & Co                        | 1.1         |
| 32 Solventis                              | 23.4        | 67 LEHOSS Group                     | 1.1         |
| 33 Kale Kimya                             | 22.0        | 68 Haeffner                         | 1.0         |
| 34 Pon Pure Chemicals Group               | 17.5        | 69 Hawkins                          | 1.0         |
| 35 Safic-Alcan                            | 17.2        |                                     |             |

NOTE: Sales are by region and may differ from the total sales figure in the main Top 100 listing. Table excludes companies that do not break out sales by geography





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- Tank Terminals, Pipelines, Logistics
- Industrial Partnerships & Investments



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

corrosive, environment friendly pigments); SamSol; specialty personal care and cosmetics ingredients; hydrocarbons and oxygenated solvents; homecare and I&I ingredients; pharmaceutical excipients and APIs; precision cleaning solutions; Cool-Phos and Vaposol; phosphating chemicals (metal pretreatment)

**Services:** Blending; packing; storage; formulation and technical support with laboratory facilities; sample management; technical, regulatory and legislative expertise; toll blending; water treatment; pigment dispersion; development and formulation

**Assets:** Application laboratories; warehousing in UK, Germany, Poland, Brazil, Nordics, Benelux, China; blending and storage facilities; own trucks

### 88 GROLMAN GROUP 2018 SALES: \$160.4M (€140M)

Neuss, Germany

[WWW.GROLMAN-GROUP.COM](http://WWW.GROLMAN-GROUP.COM)

**Managing partners:** Dirk Grolman, Florian Grolman; **Managing director:** Mike Dorsam

**Products:** Pigments and dyes; mineral fillers and performance materials; binders; additives; actives and intermediates

**Services:** Formulation and testing lab services

**Assets:** Laboratories; warehouses

### 89 ATLANTIC CHEMICALS TRADING 2018 SALES: \$160.4M (€140M)

Hamburg, Germany

[WWW.ACT.DE](http://WWW.ACT.DE)

**CEO:** Dr Ramin Ghaffari

**Products:** Vitamins; amino acids; sweeteners; energy ingredients; sports nutrition ingredients; preservatives; acidifiers; flavours and fragrances; plant extracts; feed additives; food additives; natural products

**Services:** Customising; global supply chain

**Assets:** 13 offices worldwide; several warehouses worldwide

**Trading sales:** 10%

### 90 KH CHEMICALS 2018 SALES: \$159.5M (€139.2M)

Zwijndrecht, Netherlands

[WWW.KHCHEMICALS.COM](http://WWW.KHCHEMICALS.COM)

**CEO:** Hans Ketting

**Products:** Acrylates; acetates; alcohols; anhydrides; aromatics; chlorinated solvents; glycols; glycol ethers; hydrocarbons; ketones; monomers; oxo-alcohols; plasticizers; propylene glycol ethers; vegetable oils

**Services:** Trading; packaging; drumming; logistics services

**Assets:** Office space; two ISO tanks

**Trading sales:** 8%

### 91 THOMMEN-FURLER 2018 SALES: \$155.8M (€136M)

Ruti bei Buren, Switzerland

[WWW.THOMMEN-FURLER.CH](http://WWW.THOMMEN-FURLER.CH)

**CEO:** Franz Christ

**Products:** Industrial chemicals (inorganics, organics, liquids and solids); ethanol; hygiene and surface cleaning products; activated carbon; intermediates; plasticizers; high purity solvents and reagents; electronic grade chemicals; industrial and automotive lubricants; marine and aviation lubricants; automotive fluids; car care products; AdBlue; wastewater treatment chemicals and installations

**Services:** Storage; blending; mixing; packaging; laboratory services; quality and control tests; hazardous waste management; Opti-Tank tank farm management by telemetry

**Assets:** Five dedicated sites for chemicals and hazardous waste handling; tank farms and warehouses for chemicals and hazardous waste; blending, mixing and filling installations; waste treatment installations; 57 road tankers and trucks for general cargo

### 92 SELECTCHEMIE 2018 SALES: \$155M

Zurich, Switzerland

[WWW.SELECTCHEMIE.CH](http://WWW.SELECTCHEMIE.CH)

**CEO:** Peter Kaufmann

**Products:** APIs; excipients; intermediates; dos-

siers and finished dosage forms; nutritional ingredients; sourcing of APIs and excipients; GDP logistic; MSDS and CLP labelling; IP consulting

**Assets:** Three warehouses

**Trading sales:** 20%

### 93 ELTON GROUP 2018 SALES: \$153.5M (€134M)

Athens, Greece

[WWW.ELTON-GROUP.COM](http://WWW.ELTON-GROUP.COM)

**CEO:** Nestor Papathanasiou

**Products:** Coatings and adhesives chemicals; construction chemicals; detergents and cosmetics ingredients; pharmaceutical ingredients; food, feed and beverage ingredients; water treatment chemicals; metal treatment chemicals; PU systems; textile chemicals; paper chemicals; agrochemicals; rubber chemicals; plastics additives; refrigerants

**Services:** Local warehousing; storage; full coverage of Greece, Bulgaria, Romania, Serbia, Turkey, Kosovo, Albania, North Macedonia, Cyprus and Ukraine markets; technical promotion and business development; inventory management

**Assets:** nine warehouses; two laboratories; trucks and tank trucks

### 94 RAHN GROUP 2018 SALES: \$145M

Zurich, Switzerland

[WWW.RAHN-GROUP.COM](http://WWW.RAHN-GROUP.COM)





**CEO:** Marcel Gatti

**Products:** Raw materials for inks, coatings and adhesives; personal care ingredients; flavours, fragrances and food ingredients

**Services:** Application support; R&D/customised products; regulatory affairs; guide formulations; international logistics; analytics

**Trading sales:** 50%

**95 ARPADIS BENELUX**  
**2018 SALES: \$142.5M (€124.4M)**

**Antwerp, Belgium**

**WWW.ARPADIS.COM**

**CEO:** Laurent Abergel

**Products:** Acrylates and monomers (MMA, GMAA, GMA + BA, EA, 2-EHA, GAA, MA); adipic acid; TDI; MDI; polyols; flame retardants; blowing agents; HMD; DBE; solvents; glycols

**Services:** Blending; packaging; dilution; storage

**96 RAINOLDI**  
**2018 SALES: \$137.5M (€120M)**

**Varese, Italy**

**WWW.RAINOLDI.IT**

**CEO:** Simone Bombardieri

**Products:** Caustic soda; potassium hydroxide; hydrochloric acid; acetates; ammonia; hydrogen peroxide; EDTA

**Services:** Storage; packaging

**Assets:** Two warehouses

**Trading sales:** 25%

**97 FARAVELLI**  
**2018 SALES: \$136.8M (€119.4M)**

**Milan, Italy**

**WWW.FARAVELLIGROUP.COM**

**CEO:** Luca Benati

**Products:** Fine chemicals; food ingredients; nutraceutical ingredients; cosmetics ingredients; pharmaceutical ingredients; animal nutrition raw materials and ingredients

**Services:** Blending; packaging; storage; cosmetics application lab services; food application lab services; international trading of commodities

**Assets:** Six warehouses

**Trading sales:** 25%

**98 HARKE GROUP**  
**2018 SALES: \$136.3M (€119M)**

**Muelheim an der Ruhr, Germany**

**WWW.HARKE.COM**

**President:** Thorsten Harke

**Products:** Cleaning and detergent chemicals; coatings; electronic/high purity chemicals; food ingredients; health and functional food ingredients; industrial chemicals; cosmetics/personal care ingredients; pharmaceutical excipients; phosphates; plastics; specialty films; specialty chemicals; synthetic polymers; water soluble films; water treatment chemicals

**Services:** Formulation; blending; mixing; encapsulation; packaging; refilling; storage; gravure; film coating; Reach consulting

**Assets:** Warehouse; packaging machines; filling stations; silo; encapsulation machines

**Trading sales:** 10%

**99 PROCHEMA**  
**2018 SALES: \$135M**

**Vienna, Austria**

**WWW.PROCHEMA.COM**

**CEO:** Werner Figlhuber

**Products:** Additives and hardeners; acrylates and methacrylates; binders and resins; monomers; organic acids; polymers; polyurethane feedstocks; reactive diluents; UV curing monomers

**Services:** Pan-European sales network specialised in selected customer branches; market research; sales; financing; storage; supply chain management

**Assets:** Nine sites in Europe and Asia

**Trading sales:** 25%

**100 URAI**  
**2018 SALES: \$134.6M (€117.5M)**

**Assago, Italy**

**WWW.URAI.IT**

**President and CEO:** Roberto Giuliani

**Products:** Specialty chemicals; pigments; additives; resins; paints and coatings chemicals; plastics and rubber chemicals; lubricants chemicals; personal care and cosmetics ingredients; food ingredients; laboratory equipment

**Services:** Technical sales and marketing; application development; quality control; warehousing; regulatory services; supply chain management; after-sales services; repackaging; blending

**101 BODO MOLLER CHEMIE**  
**2018 SALES: \$134.0TM (€117M)**

**Offenbach am Main, Germany**

**WWW.BM-CHEMIE.COM**

**Chairman managing director:** Frank Haug

**Products:** Adhesives and bonding systems; sealants; silicones; resins; casting and potting resins for electronics; hardeners and curing agents; composites; mould-making ingredients; additives for coatings; additives for plastics and rubber; additives for lubricants; textiles chemicals and dyes; packaging and labelling adhesives

**Services:** Packaging; filling; testing; modification; blending; education and training

**Assets:** Headquarters in Germany; affiliates in Europe, Africa, Asia and US; warehouses; adhesives competence centre and laboratory facilities; production plant for polymer formulations

**102 KEYSER & MACKAY**  
**2018 SALES: \$134.0M (€117M)**

**Amsterdam, Netherlands**

**WWW.KEYSERMACKAY.COM**

**Managing partners:** Gerard de Waal, Willem Augustinus

**Products:** Specialty chemicals; coatings and inks materials; plastics and rubber additives; adhesives and sealants; construction chemicals; personal care ingredients; food and feed ingredients; pharmaceutical ingredients

**Services:** Technical sales and marketing; local and central stockholding; sampling

**Assets:** Offices and warehouses in seven European countries.

**Trading sales:** Less than 5%

**103 PENPET PETROCHEMICAL TRADING**  
**2018 SALES: \$131.7M (€115M)**

**Hamburg, Germany**

**WWW.PENPET.COM**

**General managers:** Tim Meister, Christoph Meister

**Products:** Oxo-alcohols; melamine; solvents; plasticizers

**Services:** Blending; packaging; storage

**Assets:** Two warehouses

**Trading sales:** 25%





# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

### 104 NORTEX 2018 SALES: \$130.2M

Moscow, Russia

[WWW.NORTEX-CHEM.RU](http://WWW.NORTEX-CHEM.RU)

**CEO:** Vladimir Yakushin

**Products:** Isocyanates; polyols; epoxy resins; synthetic rubber; natural rubber; phenolic resins; polyolefins; engineering plastics; surfactants; titanium dioxide; cellulose ethers; antioxidants; UV stabilizers; plasticizers; PVC resins

**Services:** Storage; packaging; logistics; technical support

**Assets:** Nine warehouses

**Trading sales:** 20%

### 105 PRIDE CHEMICAL SOLUTIONS 2018 SALES: \$130M

Holtsville, New York

[WWW.PRIDESOL.COM](http://WWW.PRIDESOL.COM)

**President:** Arthur Dhoni Jr

**Products:** Alcohols; amines; esters; glycols; glycol ethers; hydrocarbons; ketones; mineral oils; petrolatum; polyols; oleochemicals; plasticizers; silicones; stearates; surfactants

**Services:** Blending; packaging; storage; NF USP kosher repackaging; RSPO repackaging; ethyl alcohol denaturing and packaging

**Assets:** Three warehouses; 12 tractor trailers; five straight trucks; 25 tank wagons; tank farm

### 106 CSC JAECKLECHEMIE 2018 SALES: \$129.9M (€113.4M)

Nuremberg, Germany

[WWW.CSC-JAEKLE.DE](http://WWW.CSC-JAEKLE.DE)

**Executives:** Robert Spath, Philipp Klass, Dr Michael Spehr, Dr Bernhard Schmid

**Products:** Industrial chemicals; acids; alkaline solutions; solvents; solids; specialties; coatings, adhesives and sealants; high quality parts cleaning chemicals; life science chemicals; water and environment chemicals

**Services:** Technical expertise and field service; warehouse and direct distribution; inventory management; blending and repackaging; proper disposal of chemical waste; worldwide shipment; trucking

**Assets:** One storing, filling and transshipment site; warehouse; two laboratories for quality assurance; six tank wagons for chemicals; 13 trucks; 23 company vehicles

### 107 GROUP BARCELONESA 2018 SALES: \$128.3M (€112M)

Barcelona, Spain

[WWW.GRUPBARCELONESA.COM](http://WWW.GRUPBARCELONESA.COM)

**President and CEO:** D Enric Collell

**Products:** Basic inorganic and organic chemicals; chlor-alkalis; acids and bases; metallic salts; chemicals for oil drilling and completion; mining chemicals; solvents; resins, curing agents and composites; food and feed additives and tailor-made blends; agrochemicals;

metal-working formulations; chemicals for detergent, disinfection, home care, personal care and pharmaceuticals; textile and leather chemicals; coatings, inks, adhesives, construction, lubricants and paper chemicals; swimming pool chemicals

**Services:** Blending; drumming; custom and toll manufacturing; contract manufacturing; VMI (telemetry); environmental and technical assistance; packaging; agency services; specialized storage and transportation

**Assets:** Eight warehouses; tanks capacity of 17,000 cubic metres; own truck fleet; commercial salesforce of 80 persons; PlusChem alliance

**Trading sales:** 20%

### 108 TILLMANNS 2018 SALES: \$127.2M (€111M)

Milan, Italy

[WWW.TILLMANNS.IT](http://WWW.TILLMANNS.IT)

**CEO:** Stefan Vollmer

**Products:** Organic and inorganic pigments; binders; resins; waxes; preservatives; specialty chemicals and additives for coatings, plastics, adhesives and construction chemicals; water treatment chemicals; functional additives and ingredients for food and feed

**Services:** Marketing; product formulation and blending; custom packaging; product evaluation in own laboratory; technical support; green chemistry product solutions; warehousing; supply chain management; vendor



managed inventory; fire class 4.1 category for storage of highly flammable products

**Assets:** Two company owned and operated warehouses; two laboratories; own truck fleet

### 109 HAVILAND ENTERPRISES 2018 SALES: \$122.4M

**Grand Rapids, Michigan, US**

[WWW.HAVILANDUSA.COM](http://WWW.HAVILANDUSA.COM)

**President and CEO:** Mike Karasiewicz

**Products:** Caustic soda; sulphuric acid; hydrochloric acid; finishing chemicals; anodizing chemicals; cleaning chemicals; pool chemicals; wastewater chemicals; potable water chemicals; solvents

**Services:** Liquid and powder blending; liquid and powder packaging; sachet/pouching; screen printing; labelling; laboratory analysis

**Assets:** Six warehouses; 14 trucks; 24 trailers; four tankers; five manufacturing locations

**Trading sales:** Less than 5%

### 110 SEA-LAND CHEMICAL 2018 SALES: \$120.9M

**Westlake, Ohio, US**

[WWW.SEALANDCHEM.COM](http://WWW.SEALANDCHEM.COM)

**President:** Jennifer Altstadt

**Products:** Acids; amines; antioxidants; biocides; chlorinated paraffins; corrosion inhibitors; defoamers; dispersants; esters; emulsifiers; ethoxylated alcohols; fatty acids; foam control agents; industrial and transportation lubricant additive components; lubricity additives; polyalphaolefins; primary amino alcohols; natural petroleum sulfonates; surfactants; vegetable and animal oils

**Services:** Stocking distributor; packaging and repackaging; product sourcing; market development; technical expertise; lubricant testing; logistics; small package to bulk deliveries; ISO9001:2015 standards; regulatory support

**Assets:** 10 warehouse locations in North America and Europe; six repackaging facilities; one testing laboratory

### 111 ALGOL CHEMICALS 2018 SALES: \$120M

**Espoo, Finland**

[WWW.ALGOLCHEMICALS.COM](http://WWW.ALGOLCHEMICALS.COM)

**Managing director:** Juha Jokinen

**Products:** Resins, binders, fillers and additives for paints and coatings; additives, auxiliaries and fillers for polymers and rubber; polymers; food ingredients and additives; raw materials for animal feed; chemicals for metal production and systems for metal treatment; industrial chemicals; water treatment chemicals; mining chemicals; ammonia gas and aqueous ammonia; soil remediation systems

tion systems

**Services:** Warehousing and bulk storage; logistics; repackaging and relabelling; blending and mixing; toll production; REACH services; laboratory testing

**Assets:** 25 warehouses

### 112 UNIPEX 2018 SALES: \$117.5M (€102.6M)

**Paris, France**

[WWW.UNIPEX.COM](http://WWW.UNIPEX.COM)

**President:** Patrice Barthelmes

**Products:** Active and functional personal care ingredients; active pharmaceutical ingredients (APIs) and excipients; enzymes; amino acids; lactose; sweeteners; sugar; starch; fibres; plasticizers; surfactants; additives; silicones; titanium dioxide (TiO<sub>2</sub>); dyes and pigments, sports grounds polymers and resins

**Services:** CSR (corporate social responsibility); warehousing; application laboratory services; formulations; regulatory services; auditing; reconditioning

**Assets:** Two owned warehouses in the Paris area

**Trading sales:** 7%

### 113 ESSENTIAL INGREDIENTS 2018 SALES: \$114.4M

**Atlanta, Georgia, US**

[WWW.ESSENTIALINGREDIENTS.COM](http://WWW.ESSENTIALINGREDIENTS.COM)

**CEO:** Kris Maynard

**Products:** Personal care ingredients; home care chemicals; industrial and institutional chemicals; pet care ingredients

**Services:** R&D solutions; product development; technical support; dedicated customer service representatives; blending; repackaging; logistics solutions; regulatory team; sample inventory; multi-language personnel

**Assets:** Seven distribution locations throughout the US

### 114 PHT INTERNATIONAL 2018 SALES: \$110.8M

**Charlotte, North Carolina, US**

[WWW.PHTINTERNATIONAL.COM](http://WWW.PHTINTERNATIONAL.COM)

**President:** Lihong Yu

**Products:** Pharmaceutical ingredients; agrochemicals; consumables; electronic chemicals, personal care ingredients; industrial chemicals

**Services:** Custom manufacturing; in-house chemical development; quality control and regulatory support; strategic sourcing; logistics; sales and marketing; sample generation; contract research organisation; import/export services in the US and China

**Assets:** Fully owned Sancus Arc manufacturing facility

### 115 TILLEY CHEMICAL 2018 SALES: \$109M

**Baltimore, Maryland, US**

[WWW.TILLEYCHEM.COM](http://WWW.TILLEYCHEM.COM)

**President:** John Tilley

**Products:** Food ingredients; pharmaceutical ingredients; personal care ingredients; HI&I chemicals

**Services:** Blending; packaging

**Assets:** Two company owned facilities; four third-party logistic providers; 26 tank trucks; 15 van trailers; 12 specialty delivery vehicles

### 116 QUIMDIS 2018 SALES: \$107.7M (€94M)

**Levallois-Perret, France**

[WWW.QUIMDIS.COM](http://WWW.QUIMDIS.COM)

**President:** Jean-Francois Quarre

**Products:** Pharmaceutical APIs and excipients; veterinary APIs and excipients; essential oils; aroma chemicals; nutraceuticals ingredients; cosmetics ingredients; food ingredients and additives; feed and pet food ingredients and additives; flavours and fragrances ingredients

**Services:** Dry granulation in GMP site; API production (diosmine); blending and filtration of essential oils

**Assets:** Three factories; three warehouses

**Trading sales:** 30%

### 117 HARWICK STANDARD DISTRIBUTION 2018 SALES: \$106M

**Akron, Ohio, US**

[WWW.HARWICK.COM](http://WWW.HARWICK.COM)

**President and CEO:** Ernie Pouttu

**Products:** Polymers; rubber chemicals; plasticizers; process oils; flame retardants; activators; chemical and color dispersions; processing aids; organic peroxides; resins; vulcanising agents; colorants; fillers; stabilisers; dry liquid concentrates

**Services:** Warehousing; bulk break; logistics; storage; import; export; technical support; regulatory support

**Assets:** Two company owned and operated warehouses; seven public warehouses, one truck

### 118 C.H. ERBSLOEH GROUP 2018 SALES: \$104.2M (€91M)

**Krefeld, Germany**

[WWW.CHERBSLOEH.COM](http://WWW.CHERBSLOEH.COM)

**CEO:** Christopher Erbsloeh

**Products:** Specialty chemicals for coatings; adhesives; construction; lubricants; pharmaceutical; cosmetics; personal and home care; rubber; plastics; electronics; water treatment; food and beverage

**Services:** Technical sales and marketing;



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

application development; analytical testing & quality control; warehousing; regulatory services; supply chain management; after sales services

**Assets:** 11 office locations; application and quality control laboratories; owned and operated warehousing and tank farm

### 119 STAUB & CO – SILBERMANN 2018 SALES: \$103.1M (€90M)

Nuremberg, Germany

[WWW.STAUB-SILBERMANN.DE](http://WWW.STAUB-SILBERMANN.DE)

**Managing directors:** Andreas Frank; Peter Stockmeier

**Products:** Industrial and specialty chemicals; acids and lyes; solvents; solid chemicals; cleaning agents; products for food, feed, pharmaceuticals, cosmetics; water treatment chemicals; thermal transfer agents; ammonia; AdBlue

**Services:** Storage; mixing; blending; filling; packaging; polymerisation

**Assets:** Two warehouses; 17 trucks

**Trading sales:** 34%

### 120 TANNER INDUSTRIES 2018 SALES: \$102.7M

Southampton, Pennsylvania, US

[WWW.TANNERIND.COM](http://WWW.TANNERIND.COM)

**President and CEO:** Stephen Brad Tanner

**Products:** Anhydrous and aqua ammonia

**Services:** Safety training; storage tanks; pump out services; storage tank repairs and maintenance

**Assets:** 16 distribution locations, full fleet of tractors and trailers

### 121 THE CHEMICAL COMPANY 2018 SALES: \$102.1M

Jamestown, Rhode Island

[WWW.THECHEMCO.COM](http://WWW.THECHEMCO.COM)

**CEO:** Robert N Roach Jr; **President:** Robert N Roach III

**Products:** Polymer additives; coatings, adhesives, sealants and elastomers (CASE); flame retardants; silanes; water treatment chemicals; intermediates; acids

**Services:** Global procurement; packaging; imports; international customs management; EH&S team; logistics; rail fleet management

**Assets:** Global network comprised of 41 sites; regional offices (California, US; Colombia; Mexico City, Mexico; Nanjing, China); 10 storage facilities; 14 railcars; global warehouses, shore tanks and distribution centres

### 122 CHEMSOLV 2018 SALES: \$102M

Roanoke, Virginia, US

[WWW.CHEMSOLV.COM](http://WWW.CHEMSOLV.COM)

**CEO:** L Glenn Austin

**Products:** Specialty blends of lacquer thinners; enamel reducers; flexo ink solvents; cleaners; acetals solvents; aromatic/aliphatic hydrocarbons; isoparaffins; alcohols; ketones; esters; glycols; glycol ethers; polyethylene glycols; amines; ethanolamines; plasticizers; surfactants; acrylates; silicones; heat transfer fluids; metal-working fluids; process oils; oils and lubricants; inorganics; phosphates; caustic potash; caustic soda; acids; high purity lab reagents

**Services:** Solvent formulation; NMP replacement; solvent distillation and purification; laboratory services; consulting on product, safety and environmental; rail terminal service

**Assets:** Six warehouses; 39 trucks; 50 trailers; bulk storage

### 123 NEO CHEMICAL 2018 SALES: \$102.0M (€89M)

Dzerzhinsk, Russia

[WWW.NEOCHEMICAL.RU](http://WWW.NEOCHEMICAL.RU)

**CEO:** Andrey Lipovetskiy; **Director:** Vladimir Fedyushkin

**Products:** Epoxy resins; additives; peroxide compounds; titanium dioxide; silanes; polyisobutylene; hardeners; hexene-1; citric acid; surfactants; base oils; disinfectants; PPU/polyols/n-pentane; furfuryl alcohol; amines







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# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

**Services:** Storage; shipping  
**Assets:** Wholesale warehouse  
**Trading sales:** 47%

### 124 CLEARTECH INDUSTRIES 2018 SALES: \$100M

**Saskatoon, Saskatchewan, Canada**  
[WWW.CLEARTECH.CA](http://WWW.CLEARTECH.CA)

**President:** Randy Bracewell  
**Products:** Water treatment; caustic soda; hydrochloric acid; chlorine; sodium hypochlorite; coagulants; flocculants; acids; alkalis; sulfites; defoamers; activated carbon; phosphates; chemical feed systems; analytical products  
**Services:** Blending; packaging  
**Assets:** 10 buildings

### 125 UNION PETROCHEMICAL 2018 SALES: \$99M

**Bangkok, Thailand**  
[WWW.UNIONPETROCHEMICAL.COM](http://WWW.UNIONPETROCHEMICAL.COM)

**Managing director:** Perapol Suwannapasi  
**Products:** Alcohols; aromatics; esters; glycols; glycol ethers; ketones; monomers; PP; PE  
**Services:** Blending; packaging; repackaging; storage; delivery; inventory management  
**Assets:** Five warehouses; 30 trucks

### 126 TAJ AL MULOOK 2018 SALES: \$95.6M

**Dubai, United Arab Emirates**  
[WWW.TAJCHEM.COM](http://WWW.TAJCHEM.COM)

**CEO and chairman:** Irfan Siddique Mulla  
**Products:** Polyurethane chemicals; lubricant additives; paint ink and coating; construction chemicals, oil and gas; solvents; PU; machinery and fabrics  
**Services:** Blending; repacking; local warehousing; technical support; supply chain management; just-in-time delivery; inventory management  
**Assets:** Marketing network in GCC and Africa; six warehouses  
**Trading sales:** 40%

### 127 QUIMISA 2015 SALES: \$95.2M

**Santa Catarina, Brazil**  
[WWW.QUIMISA.COM.BR](http://WWW.QUIMISA.COM.BR)

**President and CEO:** Rogerio Wehmuth  
**Products:** Caustic soda; chlorinated solvents; oxygenated solvents; aromatic solvents; glycols; hydrogen peroxide; organic acids; inorganic chemicals; ethanolamines; heat transfer fluids; textile auxiliaries and dyestuffs; enzymes; chemicals for household care and industrial/institutional applications; water treatment chemicals

**Services:** Liquid and dry storage; packaging; blending; flexible delivery; technical support; product and solutions development  
**Assets:** One headquarters; three branches; eight warehouses; 75 trucks

### 128 TRIISO 2018 SALES: \$93M

**Cardiff, California, US**  
[WWW.TRIISO.COM](http://WWW.TRIISO.COM)

**President:** Jason Scott  
**Products:** Paints; coatings and ink raw materials; adhesive and sealant ingredients; plastics and composite chemicals; lubricant and metalworking additives; polyurethane chemicals  
**Services:** Logistics; warehousing  
**Assets:** One office; multiple 3PL service providers

### 129 MAYS CHEMICAL 2018 SALES: \$92.7M

**Indianapolis, Indiana, US**  
[WWW.MAYSCHEM.COM](http://WWW.MAYSCHEM.COM)

**President:** Kristin Mays Corbitt  
**Products:** acidulants; binders; buffers; chelates; citrates; emulsifiers; excipients; glycerine; gums; methanol; phosphates; solvents; starches; stearates; surfactants  
**Services:** Shipping; warehousing; liquid blending; repackaging; reformulation  
**Assets:** Two warehouses; one warehouse/blending facility; one freight truck; six liquid tank trucks; 12 forklifts/related equipment

### 130 NOAHS ARK CHEMICALS 2018 SALES: \$91.6M (€80M)

**London, UK**  
[WWW.NOAHSARK.EU.COM](http://WWW.NOAHSARK.EU.COM)

**CEO:** Bharat Bhardwaj  
**Products:** Solvents; glycols; styrene; benzene; acrylates  
**Services:** Blending; storage  
**Trading sales:** 30%

### 131 NOVASOL CHEMICALS GROUP 2018 SALES: \$90M

**Brussels, Belgium**  
[NOVASOLCHEMICALS.COM](http://NOVASOLCHEMICALS.COM)

**General manager:** Claude Fickers  
**Global business director:** Francois-Xavier Coiffard  
**Products:** Extraction and reaction solvents; intermediates and reagents; active ingredients/extracts; botanicals; essential oils; clays; emollients; preservatives; rheology modifiers; UV filters; conditioners; surfactants; flavours and fragrances; carbonates; additives; DAAM; ADH; EMA; GMA; acrylates/methacrylates; sulfolane; trimercaptotriazine and hydroxies; water treatment chemicals; solvents

**Services:** Product mixing; blending; tailor-made packaging solutions; Reach lead registrant of many molecules  
**Assets:** Global presence; local technical sales forces

### 132 TCR INDUSTRIES 2018 SALES: \$88M

**La Palma, California, US**  
[WWW.TCRINDUSTRIES.COM](http://WWW.TCRINDUSTRIES.COM)

**CEO:** Sam Rumfola  
**Products:** Resins; pigments; additives and specialties  
**Services:** Storage  
**Assets:** 10 warehouses  
**Trading sales:** 10-20%

### 133 MEGACHEM 2018 SALES: \$86.5M (\$\$117.9M)

**Singapore**  
[WWW.MEGACHEM.COM.SG](http://WWW.MEGACHEM.COM.SG)

**Chairman and CEO:** Sidney Chew  
**Products:** Surfactants; plasticizers; flame retardants; catalysts; anti-foaming agents; emulsifiers; aromatics; food and beverage additives; pharmaceutical chemicals; antioxidants; corrosion inhibitors; silicone fluid; biocides; persulphates; polymers  
**Services:** Global sourcing; storage; vendor-managed inventory; transportation; custom blending; repackaging; packaging; labelling; technical and laboratory services  
**Assets:** Warehouses; trucks; blenders/reactors

### 134 AEGEAN FIRST COMPANY (AFCO) 2018 SALES: \$85.1M (€74.3M)

**Athens, Greece**  
[WWW.AFCO.GR](http://WWW.AFCO.GR)

**President and general manager:** Christos Spanos  
**Products:** Polymers; aromatics; solvents; caustic soda; inorganics; plasticizers; food additives; pharmaceutical cleaning agents; water treatment chemicals; recycled materials  
**Services:** Repackaging

### 135 GREENCHEM INDUSTRIES 2018 SALES: \$84.5M

**West Palm Beach, Florida, US**  
[WWW.GREENCHEMINDUSTRIES.COM](http://WWW.GREENCHEMINDUSTRIES.COM)  
**CEO:** John S Lagae

**Products:** Acetates; acids; acrylates; alcohols; amines; aromatics; chlorinated solvents; ketones; glycerine; glycols; glycol ethers; nonyl phenol ethoxylates; phthalates; plasticizers; PCBTf; DMC; THF; d-limonene  
**Services:** Sourcing; import; logistics; repackaging; JIT inventory management; in-house customs broker; freight  
**Assets:** 38 public warehouses

### LATIN AMERICA DISTRIBUTION LEADERS (2018 SALES)

| Company                    | Sales (\$m) | Company                             | Sales (\$m) | Company                            | Sales (\$m) |
|----------------------------|-------------|-------------------------------------|-------------|------------------------------------|-------------|
| 1 Tricon Energy            | 1,098.7     | 24 Omya                             | 40.7        | 46 Quimidroga                      | 6.0         |
| 2 Brenntag                 | 925.4       | 25 Sulatlantica                     | 38.0        | 47 Ricardo Molina Group            | 5.7         |
| 3 Manuchar                 | 771.0       | 26 Moraes de Castro                 | 29.1        | 48 Aceto                           | 5.0         |
| 4 GTM Holdings             | 642.0       | 27 Ravago Chemicals                 | 25.2        | 49 Prakash Chemicals International | 5.0         |
| 5 Helm                     | 515.6       | 28 Selectchemie                     | 25.0        | 50 Van Horn, Metz & Co             | 5.0         |
| 6 Quimica Anastacio        | 374.9       | 29 Brisco do Brasil                 | 24.5        | 51 Arpadis Benelux                 | 5.0         |
| 7 Pochteca Materias Primas | 336.5       | 30 CellMark Chemicals               | 23.0        | 52 Transmare Chemie                | 4.7         |
| 8 Snetor                   | 325.0       | 31 Petrochem Middle East            | 21.4        | 53 2M Holdings                     | 4.6         |
| 9 M. Cassab                | 316.2       | 32 CG Chemikalien                   | 20.7        | 54 Penpet Petrochemical Trading    | 3.5         |
| 10 Quimtia                 | 303.0       | 33 KH Chemicals                     | 20.5        | 55 Solventis                       | 3.4         |
| 11 Bandeirante Quimica     | 207.9       | 34 DAXX                             | 19.0        | 56 Norkem Holdings                 | 3.4         |
| 12 Jebesen & Jessen        | 195.9       | 35 ECEM European Chemical Marketing | 18.6        | 57 Quimdis                         | 3.0         |
| 13 Indukern                | 166.3       | 36 The Chemical Company             | 15.2        | 58 Harwick Standard Distribution   | 2.3         |
| 14 Quimisa                 | 95.2        | 37 Barentz International            | 15.2        | 59 WISTEMA                         | 2.2         |
| 15 Vikudha Overseas        | 82.0        | 38 Sinochem Plastics                | 15.0        | 60 Hawkins                         | 2.0         |
| 16 Biesterfeld             | 58.0        | 39 Wego Chemical Group              | 14.0        | 61 Ketsin de Costa Rica            | 2.0         |
| 17 Metachem Group          | 52.3        | 40 DutCH2                           | 13.1        | 62 Atlantic Chemicals Trading      | 1.4         |
| 18 Carbono Quimica         | 49.0        | 41 Shamrock Shipping & Trading      | 10.3        | 63 LEHOSS Group                    | 1.1         |
| 19 Andes Chemical          | 48.2        | 42 Clariquimica                     | 9.3         | 64 Astro Chemicals                 | 1.0         |
| 20 ICC Chemical            | 44.5        | 43 BUFA Chemikalien Group           | 9.0         | 65 Grupo RNM                       | 1.0         |
| 21 Verquimica              | 42.4        | 44 Joss Elastomers                  | 8.2         | 66 R.E. Carroll                    | 1.0         |
| 22 Henry Hirschen          | 42.0        | 45 The Plaza Group                  | 8.0         | 67 Rahn Group                      | 1.0         |

NOTE: Sales are by region and may differ from the total sales figure in the main Top 100 listing. Table excludes companies that do not break out sales by geography

### 136 CORNELIUS GROUP 2018 SALES: \$83.3M (£65.25M)

**Bishops Stortford, UK**

[WWW.CORNELIUS.CO.UK](http://WWW.CORNELIUS.CO.UK)

**Chairman:** Neville Prior; **CEO:** Darren Spiby

**Products:** Monomers; specialty chemicals; food ingredients; personal care ingredients; pigments; additives; resins; minerals; surfactants; adhesive materials; excipients; natural products; animal feed ingredients; medical device raw materials; coatings ingredients

**Services:** Global supply chain management; laboratory services; logistics; legislative/regulatory advice; distillation; chemical reactions and manufacturing; repackaging; R&D; sales and marketing

**Assets:** nine warehouses; five laboratories; two manufacturing sites; seven offices; one clean room

**Trading sales:** 3%

### 137 ILARIO ORMEZZANO 2018 SALES: \$83.1M (£72.5M)

**Gaglianico, Italy**

[WWW.ILARIOORMEZZANO.IT](http://WWW.ILARIOORMEZZANO.IT)

**President:** Giancarlo Ormezzano

**Products:** Solvents; phenol; acrylates; base chemicals; pharmaceutical intermediates; hydrocarbons

**Services:** Storage of liquid and solid products; storage for third parties; blending; customised handling (packaging, mixing, filling and labelling); quality control; technical after sales support; Reach support

**Assets:** two owned warehouses with total space of 85,000 square metres and storage capacity for liquid products of more than 7,000 cubic metres; one warehouse for rent; three offices; two laboratories; five trucks

**Trading sales:** 20%

### 138 AFRIGLOBAL COMMODITIES 2018 SALES: \$83.0M

**Dubai, UAE**

[WWW.AFRIGLOBALONLINE.COM](http://WWW.AFRIGLOBALONLINE.COM)

**Managing director:** Maneesh Bhushan Garg

**Products:** Flexible and rigid polyurethane chemicals; food and feed ingredients; beverage grade ethanol; paint raw materials; mining chemicals; cosmetics raw materials and fine chemicals; soap and detergent raw materials; leather, textile and water treatment chemicals; oilfield chemicals; lube additives; plastic resins and processing aids; construction chemicals; pharmaceutical excipients

**Services:** Imports; technical after-sales support; end-to-end logistics; VMI; warehousing; blending

**Assets:** eight warehouses; 26 trucks; blending and formulation unit

**Trading sales:** 7.1%

### 139 ROWELL CHEMICAL 2018 SALES: \$82M

**Hinsdale, Illinois, US**

[WWW.ROWELLCHEMICAL.COM](http://WWW.ROWELLCHEMICAL.COM)

**President:** Thomas Harris

**Products:** Bleach; caustic soda; potassium hydroxide; hydrochloric acid; sulphuric acid; phosphoric acid; hydrofluosilicic acid

**Services:** Transloading from railcars to bulk storage tanks or trailers

**Assets:** two warehouses; 15 trucks; 35 trailers

### 140 MILES CHEMICAL 2018 SALES: \$80.5M

**Arleta, California, US**

[WWW.MILESCHEMICAL.COM](http://WWW.MILESCHEMICAL.COM)

**CEO:** Michael Miles; **Chairman:** Anthony Milesix

**Products:** Acids; esters; lubricants; alcohols; flavours and fragrances; plasticizers; food additives; polyglycols; amines; glycol ethers; hydrogen peroxide; solvents; chelating agents; chlor-alkali; inorganics; surfactants; chlorinated solvents; thickening agents; ketones





**Services:** Manufacturing; blending; contract packaging; solvent reclamation; technical training; safety training; hazardous waste removal; customer product research

**Assets:** bulk storage capacity; warehouse space; 30 trucks; 32 trailers; 21 vans; 14 tankers; six Bobtails

### 141 JOSS ELASTOMERS 2018 SALES: \$80.2M (€70M)

**Alkmaar, Netherlands**  
[WWW.JOSS.NL](http://WWW.JOSS.NL)

**President and CEO:** Frits C Jeukens

**Products:** Natural rubber; natural latex; synthetic rubbers; rubber chemicals; carbon black; renewable silica; process oils; silane coupling agents

**Services:** Warehousing; full logistical services from factory to final destination

**Trading sales:** 60%

### 142 WEBB CHEMICAL SERVICE 2018 SALES: \$80M

**Muskegon Heights, Michigan, US**  
[WWW.WEBBCHEMICAL.COM](http://WWW.WEBBCHEMICAL.COM)

**CEO:** Brad Hilleary

**President:** Charlie Stevens

**Products:** Caustic soda; caustic potash; solvents; aromatics; acids; surfactants; amines; ethanolamines; pharmaceutical ingredients; water and wastewater treatment chemicals; HI&I chemicals; coatings chemicals; metal finishing chemicals

**Services:** Packaging; storage; contract packaging; VMI; custom training; blending

**Assets:** 40 tankers; 12 delivering boxes; six delivering tractors; five warehouses; 28 bulk tanks

### 143 AL NAHDA INTERNATIONAL (ANICHEM GROUP) 2018 SALES: \$79.8M

**Dubai, United Arab Emirates**  
[WWW.ALNAHDAFZ.COM](http://WWW.ALNAHDAFZ.COM)

**Group managing director:** Dr T R Vijayan

**Products:** Solvents; acetates; acrylates; alcohols; aromatics; cellulose ethers; coating additives; glycols; pigments; polymer emulsions; thinners; ethanol; IPA; LABSA

**Services:** Terminal storage for bulk liquid chemicals; drumming; 3PL logistics warehousing; custom blending

**Assets:** tank terminal storage with dedicated berth access; nine warehouses; three production facilities; three laboratories

**Trading sales:** 70%

### 144 CHEM INTERNATIONAL 2018 SALES: \$79.1M

**Warsaw, Poland**  
[WWW.CHEM-INTERNATIONAL.PL](http://WWW.CHEM-INTERNATIONAL.PL)

**CEO:** Cezary Mielczarek

**Board member:** Pawel Tomaszewicz

**Products:** VAM; styrene monomer; butyl acrylate; phenol; glycols; solvents; anhydrides; polymers; EPS; caustic soda

**Services:** Logistics support; intermodal solu-

tions; warehousing; storage; customised services and solutions; technical support

### 145 PRAKASH CHEMICALS INTERNATIONAL 2018 SALES: \$78.5M

**Vadodara, Gujarat, India**  
[WWW.PCIPLINDIA.COM](http://WWW.PCIPLINDIA.COM)

**Managing director:** Manish K Shah

**Products:** Caustic soda flakes; TDI; caustic soda prills; benzyl alcohol; ethyl acetate; sodium sulphate anhydrous; cinnamic aldehyde; acetone; SLES; chlorinated paraffin wax; benzyl chloride; citric acid; liquid glucose; DEP; dextrose monohydrate; hydrochloric acid; white oil

**Services:** Blending; packaging; storage; labelling; logistics supply chain service; quality assurance; inspection; country specific documents compliance; Reach registration; FAMI-QS certification

**Assets:** two manufacturing plants; two warehouses; three subsidiaries outside India

### 146 GEORGE S COYNE CHEMICAL 2018 SALES: \$76.8M

**Croydon, Pennsylvania, US**  
[WWW.COYNECHEMICAL.COM](http://WWW.COYNECHEMICAL.COM)

**President and CEO:** Thomas H Coyne Sr

**Products:** Acids; alcohols; amines; chelating agents; chlor-alkali; chlorinated solvents; food additives; glycol ethers; hydrogen peroxide; inorganics; ketones; polymers; specialty quats; surfactants; potable and waste

water treatment chemicals

**Services:** Blending; technical training; contract packaging; terminal rail to truck transloading

**Assets:** Four warehouses; 27 trucks; over 50 trailers or tankers

### 147 WILL & CO 2018 SALES: \$76.8M (€67M)

**Badhoevedorp, Netherlands**

[WWW.WILL-CO.NL](http://WWW.WILL-CO.NL)

**Managing director:** Jacques van Lindonk

**Products:** 1,4-butanediol and derivatives (THF, GBL); plasticizers and flame retardants; pigments; proteins; cosmetic and personal care ingredients; coating resins and additives; bio-based solvents and binders; impact modifiers for plastics; foaming agents for plastics; additive masterbatches; sulfamic acid; ferric chloride; engineering plastics and compounds

**Services:** Storage management; logistics management; sales and marketing

**Trading sales:** 90%

### 148 CALLAHAN CHEMICAL 2018 SALES: \$75M

**Palmyra, New Jersey, US**

[WWW.CALCHEM.COM](http://WWW.CALCHEM.COM)

**President:** Gregory D. Shetler

**Products:** Coatings; adhesives sealants and elastomers; household, institutional and industrial chemicals; pharmaceutical/nutraceutical ingredients; personal care/cosmetics ingredients; food ingredients; functional fluids

**Services:** Bulk liquids packaging; custom blending; returnable containers, drums and totes; customized tote programmes; custom labelling; remote tank monitoring; vendor-managed inventory; consignment inventory; committed inventory to forecast

**Assets:** White rooms; bulk storage; company owned and operated fleet; nine warehouses; 12 trucks; tank farm; two regional offices

### 149 CHEMICAL SOLVENTS 2018 SALES: \$75M

**Cleveland, Ohio, US**

[WWW.CHEMICALSOLVENTS.COM](http://WWW.CHEMICALSOLVENTS.COM)

**Owner:** Ed Pavlish

**Products:** Aromatics; aliphatics; ethanolamines; purge solvents; acetates; silicones; plasticizers; organic solvents; oil and gas chemicals; chlorinated solvents; THF; NPB; cyclohexanone

**Services:** Custom blending; toll blending; hazardous and non-hazardous waste handling; storage; packaging

**Assets:** four warehouses; storage tanks

### 150 CONNECTION CHEMICAL 2018 SALES: \$73M

**Newtown, Pennsylvania, US**

[WWW.CONNECTIONCHEMICAL.COM](http://WWW.CONNECTIONCHEMICAL.COM)

**President:** Frank Farish

**Products:** Caustic soda; caustic potash; industrial and institutional chemicals; compounding chemicals; agricultural products; water treatment chemicals; food and beverage ingredients; feed ingredients; pulp and paper chemicals; oil and gas chemicals; metal finishing and flux chemicals; phosphates; mineral acids

**Services:** Logistics; importing; inventory management; supply chain solutions; repackaging; dilutions; blending; outsourcing

**Assets:** 12 stocking locations nationwide; strategic deep draft storage

### 151 MAHA CHEMICALS 2018 SALES: \$73M

**Singapore**

[WWW.MAHACHEM.COM](http://WWW.MAHACHEM.COM)

**CEO:** Tan Seow Hoon

**Products:** Carbon black; construction chemicals; resins; polymers; additives; functional fillers; pigments; colourants; biocides; surfactants

**Services:** Sales and marketing; warehouse storage; logistics; packaging

**Assets:** 12 warehouses; 12 trucks

**Trading sales:** 100%

### 152 RICARDO MOLINA GROUP 2018 SALES: \$71.7M (€62.6M)

**Barcelona, Spain**

[WWW.RICARDOMOLINA.COM](http://WWW.RICARDOMOLINA.COM)

**President:** Gemma Molina

**Products:** Specialty chemicals; coatings materials; building and construction chemicals; adhesives; lubricants; pharmaceutical ingredients; cosmetics ingredients; personal and home care chemicals; rubber chemicals; plastics additives; water treatment chemicals; food and beverage ingredients; agrochemicals

**Services:** Technical sales and marketing; application development; quality control; warehousing; regulatory services; supply chain management; after sales services; repackaging

**Assets:** three laboratories; one warehouse

### 153 CHEMISPHERE 2018 SALES: \$70M

**St Louis, Missouri, US**

[WWW.CHEMISPHERECORP.COM](http://WWW.CHEMISPHERECORP.COM)

**President:** Matthew Schwent

**Products:** Beverage grade ethanol; denatured ethanol; aliphatic solvents; alcohols; aromatics; ketones; glycol ethers

ics; ketones; glycol ethers

**Services:** Toll manufacturing; custom blending; packaging; USP packaging; storage; rail-car transloading

**Assets:** tank farm storage; 14 car rail spur; warehouse space; bulk tanker fleet

### 154 KALE KIMYA 2018 SALES: \$70M

**Kocaeli, Turkey**

[WWW.KALEKIMYA.COM](http://WWW.KALEKIMYA.COM)

**CEO:** Birgen Kaleagasi

**Products:** Detergent additives; disinfectant and protection chemicals; emulsifiers; polymers; surfactants; pool chemicals; actives and antioxidants; paints; oils and esters; conditioners; protectives; perfume; silicones; UV filters; fatty alcohols; adhesives

**Services:** Storage; transport; production; blending; packaging

**Assets:** Five warehouses; four trucks; one production facility; storage; bulk storage

**Trading sales:** 30%

### 155 MOGOIL 2018 SALES: \$68.7M (€60M)

**Berlin, Germany**

[WWW.MOGOIL.COM](http://WWW.MOGOIL.COM)

**General director:** Andreas Rogge

**Products:** Base oils; process oils; naphthenic oils; white oils; low viscosity oils; rubber process oils

**Services:** Storage; technical support; logistics solutions

**Trading sales:** 30%

### 156 SHAMROCK SHIPPING & TRADING 2018 SALES: \$68.5M

**Limassol, Cyprus**

[WWW.SHAMROCKOILS.COM](http://WWW.SHAMROCKOILS.COM)

**Managing Director:** Céline Boutier

**Products:** Base oils; polyalphaolefins; naphthenic oils; re-refined base oils; additives, glycols, waxes, white oils; recycled oils; rubber process oils, petroleum jelly, bitumen, anti-freeze

**Services:** Supply chain and logistics; financing and trade finance; flexitank loading; market intelligence; storage; transshipment

**Assets:** Offices in Cyprus, France and UAE

**Trading sales:** 50%

### 157 BUCKLEY OIL 2018 SALES: \$67M

**Midlothian, Texas, US**

[WWW.BUCKLEYOIL.COM](http://WWW.BUCKLEYOIL.COM)

**President:** Robert Rice

**Products:** Solvents, alcohols, aliphatics, aromatics, glycols, glycol ethers, ketones, base oils, finished lubricants





**Services:** Blending, packaging, toll blending, storage, delivery, custom packaging, transloading  
**Assets:** four warehouses, 20 trucks  
**Trading sales:** >5%

### 158 SKYHAWK CHEMICALS

**2018 SALES: \$66.9M**

**Houston, Texas, US**  
[WWW.SKYHAWKCHEMICALS.COM](http://WWW.SKYHAWKCHEMICALS.COM)

**President:** Clark Knickerbocker  
**Products:** Caustic soda; methanol; calcium chloride; sulfuric acid; anhydrous ammonia; aqua ammonia; KOH, urea, propylene glycol, hydrochloric acid, xylene, bleach, polyphosphoric acid, benzoic acid, ethylene glycol  
**Services:** Blending; packaging; storage

### 159 SOLVCHEM

**2018 SALES: \$66.2M**

**Pearland, Texas, US**  
[WWW.SOLVCHEM.COM](http://WWW.SOLVCHEM.COM)

**President and CEO:** Jean-Pierre Baizan  
**Products:** Solvents; organic and inorganic chemicals; epoxies; silicones; silicone emulsions; hydrocarbon resins; hydroxyl

ethyl cellulose; titanium dioxide; acrylates  
**Services:** Custom packaging; custom blending; toll manufacturing; container management programmes; export services; technical support; green chemistry product solutions; small container filling  
**Assets:** Nine trucks; 24 trailers; 15 tankers

### 160 BRAINERD CHEMICAL

**2018 SALES: \$66M**

**Tulsa, Oklahoma, US**  
[WWW.BRAINERDCHEMICAL.COM](http://WWW.BRAINERDCHEMICAL.COM)  
**CEO:** Mathew A. Brainerd

**Products:** Peracetic acid; hydrofluoric acid; sulphuric acid; nitric acid; refrigerants; aromatics; aliphatics; glycols; glycol ethers; high hazard acids; chlor-alkali; alcohols; formaldehyde; food processing sanitation chemicals; water treatment chemicals  
**Services:** Packaging; blending; manufacturing/engineering services; contract packing; toll manufacturing; logistic services; warehousing; transloading  
**Assets:** Four production locations in Oklahoma, North Carolina, and Illinois; tank terminals; rail terminals; fleet of trucks, trailers and bulk tankers

### 161 ASTRO CHEMICALS

**2018 SALES: \$65M**

**Springfield, Massachusetts, US**  
[WWW.ASTROCHEMICALS.COM](http://WWW.ASTROCHEMICALS.COM)

**President:** Chris Diamond  
**Products:** Solvents; chlor-alkali; pharmaceutical grade chemicals; food grade chemicals; adhesives; activated carbon; water treatment chemicals; wastewater treatment chemicals; mineral oils and petrolatums; acetates; heat transfer fluids; alcohols; citrates; phosphates; silicates  
**Services:** Blending; packaging; storage; logistics  
**Assets:** Two warehouses, 12 trucks, five tankers; 12 storage tanks

### 162 LAVOLLEE

**2018 SALES: \$64.2M (€56M)**

**Levallois, France**  
[WWW.LAVOLLEE.COM](http://WWW.LAVOLLEE.COM)

**President:** Herve Lavallee  
**Products:** Ingredients for life sciences; industrial chemicals  
**Services:** Sales development; storage; formulation support; regulatory advice; VMI; outsourcing; repackaging



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# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

**Assets:** One laboratory

**163 PROQUIBASA**  
**2018 SALES: \$60.7M (€53M)**

**Barcelona, Spain**

[WWW.PROQUIBASA.COM](http://WWW.PROQUIBASA.COM)

**CEO:** Ivan Sanchez

**Products:** Specialty and commodity chemicals; coatings, construction and adhesives materials; pigments and performance products; water treatment chemicals; household and industrial cleaning chemicals; lubricants and metalworking chemicals

**Services:** Technical service; blending; manufacturing; toll manufacturing; bulk loading and storage; warehousing

**Assets:** Full service and wholly owned facilities in Barcelona with tank farm and warehouse; regional hub in Madrid with tank farm and warehouse

**164 WALSH & ASSOCIATES**  
**2018 SALES: \$60.6M**

**Saint Louis, Missouri, US**

[WWW.WALSH-ASSOC.COM](http://WWW.WALSH-ASSOC.COM)

**President and CEO:** Ellen M Murphy

**Products:** CASE chemicals; household, industrial and institutional chemicals; inks; personal care ingredients; oil and gas chemicals; agricultural chemicals; food and beverage ingredients; pharmaceutical ingredients; plastic additives; green chemicals

**Services:** Manufacturing; blending; contract packaging; technical training; IFS certified warehousing

**Assets:** Eight warehouse locations; liquid bulk storage; one tractor trailer

**165 DIEN**  
**2018 SALES: \$59.5M**

**Dallas, Texas, US**

[WWW.DIENINC.COM](http://WWW.DIENINC.COM)

**President:** Dien Stout

**Products:** Personal care ingredients; nutrition; food and beverage ingredients; industrial chemicals

**166 AIREDALE CHEMICAL**  
**2018 SALES: \$57.4M (€45M)**

**West Yorkshire, UK**

[WWW.AIREDALECHEMICAL.COM](http://WWW.AIREDALECHEMICAL.COM)

**Managing director:** Chris Chadwick

**Products:** Phosphoric acid; peracetic acid; hydrogen peroxide; acetic acid; caustic soda; manganese nitrate; polyaluminium chloride; diammonium phosphate; phosphates; phosphonates; surfactants; dyes and textile auxiliary chemicals; water treatment chemicals; cleaning and detergency chemicals

**Services:** Contract manufacturing; small pack chemical production; waste management

**Assets:** production and storage facility; six warehouse locations; 20 fully owned trucks; R&D/QC laboratories

**Trading sales:** 5%

**167 EMSA TECNOLOGIA QUIMICA**  
**2018 SALES: \$57.3M (€50M)**

**Barcelona, Spain**

[WWW.EMSAQUIMICA.COM](http://WWW.EMSAQUIMICA.COM)

**President:** Jorge Grima

**Products:** Pigments; fillers; binders; inorganics; surfactants; minerals; additives

**Services:** Blending; packaging; storage

**Assets:** Four storage locations

**168 HUBBARD-HALL**  
**2018 SALES: \$56.2M**

**Waterbury, Connecticut, US**

[WWW.HUBBARDHALL.COM](http://WWW.HUBBARDHALL.COM)

**President and CEO:** Molly Kellogg

**Products:** Chlor-alkali chemicals; organic solvents; inorganic chemicals; specialty solvents; hydrogen peroxide-based specialties; surface treatment chemicals; corrosion prevention chemicals; paint stripping specialty formulations; wastewater treatment specialty blends

**Services:** Manufacturing/formulation of chemical specialties; custom blending; warehousing; analytical and laboratory services

**Assets:** Two manufacturing facilities; six warehouses; eight trucks

**169 TRINTERNATIONAL**  
**2018 SALES: \$54.7M**

**Seattle, Washington, US**

[WWW.TRICHEMICALS.COM](http://WWW.TRICHEMICALS.COM)

**CEO:** Megan E Gluth-Bohan

**Products:** Industrial, specialty, and fine chemicals for paints, coatings, adhesives, sealants, inks and dyes; polymers; composites and construction chemicals; metalworking chemicals; textile chemicals; lubricants; household and industrial cleaning chemicals; water treatment chemicals; oil and gas chemicals; food and beverage ingredients; feed and agricultural chemicals; pharmaceutical ingredients; cosmetics and personal care products

**Services:** Marketing; logistics; technical services; custom manufacturing; blending; contract packaging

**Trading sales:** 49%

**170 CAMBRIAN SOLUTIONS**  
**2018 SALES: \$53.5M (C\$73M)**

**Oakville, Ontario, Canada**

[WWW.CAMBRIAN.COM](http://WWW.CAMBRIAN.COM)

**President:** Peter Jobling

**Products:** Organic ingredients; food ingredients; sodium reduction agents; green cleaning solutions; industrial additives; personal care ingredients; health ingredients; pulp and paper chemicals; petroleum lubricants; customized petroleum blends

**Services:** Customised petroleum laboratory formulations; blending; packaging; test kitchen; in-house laboratory

**171 NEWPORT INDUSTRIES**  
**2018 SALES: \$53.4M (€41.9M)**

**Richmond, Surrey, UK**

[WWW.NEWPORT-INDUSTRIES.COM](http://WWW.NEWPORT-INDUSTRIES.COM)

**Managing director:** Raj Patel

**Products:** Soda ash; sodium bicarbonate; hydrocarbon resin; calcined bauxite; l-carnitine; resins; mineral animal feed materials; industrial chemicals

**Services:** Supply chain management; sourcing

**172 VALUDOR PRODUCTS**  
**2018 SALES: \$53M**

**San Diego, California, US**

[WWW.SOLVCHEM.COM](http://WWW.SOLVCHEM.COM)

**CEO:** John Tree

**Products:** Agriculture/animal feed micronutrients; fertilizer ingredients; acids; inorganics; industrial chemicals; coatings, adhesives, sealants and elastomers; resins

**Services:** Sourcing; storage; dry and liquid blending; product development; new product innovation; organic certification

**Assets:** 16 warehouses; regional offices

**173 METACHEM GROUP**  
**2018 SALES: \$52.3M**

**Sao Paulo, Brazil**

[WWW.METACHEM.COM.BR](http://WWW.METACHEM.COM.BR)

**President:** Ricardo Rego Freitas

**Products:** Food ingredients; mineral oils; coatings additives; plastics additives; feed ingredients; specialty chemicals

**Services:** Storage, logistics

**Assets:** Three warehouses; one head office/sales office; one sales office

**Trading sales:** 50%

**174 VAN HORN, METZ & CO**  
**2018 SALES: \$51M**

**Conshohocken, Pennsylvania, US**

[WWW.VANHORNMETZ.COM](http://WWW.VANHORNMETZ.COM)

**President:** Barret C Fisher

**Products:** Additives; specialty resins; extenders; pigments; dyes; base stock; silicones; surfactants; esters; thickeners; PAOs

**Services:** Dry blending; pigment treatment

**Assets:** 11 warehouses

**Trading sales:** 15%

### EUROPE CHEMICAL DISTRIBUTION LEADERS (2018 SALES)

| Company                             | Sales (\$m) | Company                               | Sales (\$m) | Company   | Sales (\$m) |
|-------------------------------------|-------------|---------------------------------------|-------------|---|-------------|
| 1 Brenntag*                         | 6,116.4     | 48 ELTON Group                        | 153.5       | 95 Kale Kimya   | 48.0        |
| 2 Helm                              | 3,297.0     | 49 Grolman Group                      | 150.8       | 96 EMSA Tecnologia Quimica                                    | 47.5        |
| 3 Univar Solutions*                 | 1,970.0     | 50 Aceto                              | 150.0       | 97 Drogas Vigo  | 45.0        |
| 4 Tricon Energy                     | 1,934.5     | 51 2M Holdings                        | 149.7       | 98 UCG (United Chemical Group)                                | 43.5        |
| 5 IMCD*                             | 1,561.4     | 52 Metafrax Trading International     | 146.6       | 99 National Chemical  | 40.8        |
| 6 Stockmeier Holding                | 1,376.9     | 53 CellMark Chemicals                 | 142.2       | 100 A. + E. Fischer-Chemie                                    | 38.9        |
| 7 Barentz International             | 1,343.0     | 54 Rainoldi                           | 137.5       | 101 WISTEMA   | 35.5        |
| 8 Biesterfeld                       | 1,281.0     | 55 Urai                               | 134.6       | 102 MY-CHEM   | 34.7        |
| 9 Azelis                            | 1,068.8     | 56 Keyser & Mackay                    | 134.0       | 103 Brugues   | 33.8        |
| 10 Quimidroga                       | 945.1       | 57 HARKE Group                        | 133.6       | 104 Joss Elastomers   | 32.1        |
| 11 OQEMA                            | 939.3       | 58 Atlantic Chemicals Trading         | 131.7       | 105 Sameca  | 29.2        |
| 12 Omya                             | 915.3       | 59 Nortex                             | 130.2       | 106 Vikudha Overseas  | 29.0        |
| 13 TER Group                        | 797.3       | 60 Selectchemie                       | 130.0       | 107 Lumar   | 28.5        |
| 14 Caldic                           | 738.9       | 61 Faravelli                          | 129.2       | 108 Equilex   | 23.5        |
| 15 Solvadis                         | 625.9       | 62 ProChema                           | 129.0       | 109 Lake Chemicals and Minerals                               | 22.1        |
| 16 Safic-Alcan                      | 594.2       | 63 CSC Jaecklechemie                  | 128.3       | 110 Manuchar  | 22.0        |
| 17 Ravago Chemicals                 | 532.7       | 64 Tillmanns                          | 127.2       | 111 WhitChem  | 20.9        |
| 18 Nordmann, Rassmann               | 477.7       | 65 Petrochem Middle East              | 122.7       | 112 Monarch Chemicals   | 20.9        |
| 19 CG Chemikalien                   | 457.7       | 66 Group Barcelonesa                  | 117.1       | 113 Biachem   | 19.0        |
| 20 LEHVOSS Group                    | 387.2       | 67 Arpadis Benelux                    | 114.0       | 114 Klaus F. Meyer  | 18.7        |
| 21 Jebsen & Jessen Group            | 374.6       | 68 Unipex                             | 110.1       | 115 Comindex  | 18.3        |
| 22 DKSH Holding**                   | 333.1       | 69 Algol Chemicals                    | 110.0       | 116 The White Sea & Baltic Company                            | 17.9        |
| 23 Indukern                         | 325.2       | 70 Penpet Petrochemical Trading       | 108.8       | 117 KEMAT   | 16.6        |
| 24 Pluschem EEIG                    | 320.0       | 71 KH Chemicals                       | 104.7       | 118 Tecnosintesi  | 16.3        |
| 25 Eigenmann & Veronelli            | 311.6       | 72 C.H. Erbsloeh Group                | 103.3       | 119 Matrix Chemie   | 16.0        |
| 26 Telko                            | 304.7       | 73 Staub & Co – Silbermann            | 103.1       | 120 DutCH2  | 15.8        |
| 27 KRAHN Chemie                     | 284.1       | 74 Bodo Moller Chemie                 | 93.8        | 121 Stort Chemicals   | 11.5        |
| 28 ICC Chemical                     | 278.1       | 75 Rahn Group                         | 89.0        | 122 Prakash Chemicals International                           | 10.4        |
| 29 KTM                              | 257.0       | 76 Quimdis                            | 88.2        | 123 Megachem  | 6.2         |
| 30 Arkem Kimya                      | 243.4       | 77 Aegean First Company (AFCO)        | 85.1        | 124 LBB Specialties (includes Charkit Chemical Company & AIC) | 5.0         |
| 31 Solventis                        | 228.0       | 78 Wego Chemical Group                | 85.0        | 125 The Chemical Company                                      | 4.2         |
| 32 Donauchem                        | 226.8       | 79 Ilario Ormezzano                   | 83.1        | 126 KPL International   | 4.2         |
| 33 Gamma Chimica                    | 222.1       | 80 Noahs Ark Chemicals                | 82.5        | 127 Marubeni Specialty Chemicals                              | 4.0         |
| 34 Norkem Holdings                  | 210.4       | 81 Neo Chemical                       | 80.5        | 128 Quimtia   | 4.0         |
| 35 ECEM European Chemical Marketing | 209.9       | 82 Chem International                 | 79.1        | 129 Dakram Materials  | 4.0         |
| 36 HSH Chemie                       | 208.5       | 83 Cornelius Group                    | 77.3        | 130 Transmare Chemie  | 3.2         |
| 37 United Trading System (UTS/ETC)  | 201.0       | 84 Will & Co                          | 75.6        | 131 Van Horn, Metz & Co                                       | 3.0         |
| 38 ChemPartners                     | 196.5       | 85 Behn Meyer Group                   | 73.3        | 132 Sea-Land Chemical   | 2.9         |
| 39 Bang & Bonsomer                  | 194.7       | 86 MOGoil                             | 68.7        | 133 Sinochem Plastics   | 2.3         |
| 40 Connect Chemicals Group          | 190.8       | 87 Novasol Chemicals                  | 67.0        | 134 Hawkins   | 2.0         |
| 41 Tennants Distribution            | 187.6       | 88 Lavollee                           | 63.0        | 135 Higgi   | 1.9         |
| 42 Grupo RNM                        | 186.8       | 89 RAI Rakha Al Khaleej International | 60.0        | 136 Protea Chemicals  | 1.6         |
| 43 IMPAG                            | 180.0       | 90 Proquibasa                         | 56.1        | 137 Taj Al Mulook   | 1.4         |
| 44 BUFA Chemikalien Group           | 175.0       | 91 Ricardo Molina Group               | 55.5        | 138 Shamrock Shipping & Trading                               | 1.1         |
| 45 Haeffner                         | 168.0       | 92 Airedale Chemical                  | 50.5        | 139 Monachem Group  | 1.1         |
| 46 Snetor                           | 168.0       | 93 PHT International                  | 48.7        | 140 Astro Chemicals   | 1.0         |
| 47 Thommen-Furler                   | 155.8       | 94 Same Chemicals                     | 48.5        |   |             |

\*EMEA (Europe, Middle East and Africa) \*\*DKSH figures are based on industry estimates. Europe sales include North America

NOTE: Sales are by region and may differ from the total sales figure in the main Top 100 listing. Table excludes companies that do not break out sales by geography



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

**175** **CHEM ONE**  
2018 SALES: \$50.1M

Houston, Texas, US

[WWW.CHEMONE.COM](http://WWW.CHEMONE.COM)

**President and CEO:** Terry Podlogar

**Products:** Feed additives; fertilizer ingredients; water treatment chemicals; food additives; industrial chemicals

**Services:** JIT inventory; pallet quantities; truckloads

**Assets:** headquarters and warehouse; independent facilities in Laredo, Texas and Tampa, Florida

**176** **CARBONO QUIMICA**  
2018 SALES: \$49M (R190M)

Sao Bernardo do Campo, Sao Paulo, Brazil

[WWW.CARBONO.COM.BR](http://WWW.CARBONO.COM.BR)

**President:** Vera Maria Miraglia Gabriel

**Products:** Aliphatic solvents; aromatic solvents; oxygenated solvents; epoxy resins; epoxy hardeners; coatings additives; paint driers; alkyd resins; pigments; glycerine; fatty acids; fatty alcohols

**Services:** Blending; packaging; bulk storage; laboratory services

**Assets:** Five subsidiaries, branches, 10 trucks

**177** **RAMCHARAN**  
2018 SALES: \$49M

[WWW.RAMCHARAN.ORG](http://WWW.RAMCHARAN.ORG)

**Managing director:** Divyesh Palicha

**Products:** Chemical, rubber and sulphur compounds; rubber chemicals; carbon blacks; polymers; chemical additives and processors; metallurgy chemicals and resins; phenolic resins and binders; private label products from Ramcharan; differentiated fillers for white compounds; specialty carbon black for high performance applications; compounded resins for performance improvement

**Services:** Packaging; storage; testing and certification; quality certification, including through an in-house lab jointly promoted by Rhein Chemie

**Assets:** 19 warehouses; 34 transport vehicles on full-time lease

**Trading sales:** 24%

**178** **MCCULLOUGH & ASSOCIATES**  
2018 SALES: \$48.5M

Atlanta, Georgia, US

[WWW.MCCANDA.COM](http://WWW.MCCANDA.COM)

**President:** George McCullough

**Products:** Organic and inorganic pigments; dispersions; wax additives; fumed silica; carbon black; clays; specialty additives; matting agents; laboratory equipment; mixers; tanks; cast urethane systems; polyure-



thane dispersions; hydrocarbon resins; silicone dispersions

**Services:** Storage and logistics; formulation assistance; technical service; process engineering services

**Assets:** Outside bonded chemical warehouse

**179** **SAME CHEMICALS**  
2018 SALES: \$48.5M (€42.3M)

Barendrecht, The Netherlands

[WWW.SAMECHEMICALS.COM](http://WWW.SAMECHEMICALS.COM)

**Managing Director:** Cees-Jan Crezée

**Products:** Styrene; DCPD; aromatics; glycols; alcohols; ketones; hydrocarbons; acetates

**Services:** Bulk distribution; salvage trading; recycling; logistics; storage; inventory management; consignment stock; marketing; sourcing; Reach consultation

**Assets:** Offices in The Netherlands, Denmark and Spain

**180** **ANDES CHEMICAL**  
2018 SALES: \$48.2M

Doral, Florida, US

[WWW.ANDESCHEM.COM](http://WWW.ANDESCHEM.COM)

**CEO:** Fernando Espinosa

**Products:** Additives; coalescents; driers; extended fillers; monomers; pigments disper-

sions; plasticizers; preservatives; resins; rheology modifiers; solvents; tire and rubber chemicals

**Services:** Inventory warehousing; freight consolidation; freight forwarding; shipping documentation; technical support; innovation centre; paint formulation and optimisation; product performance evaluations

**Assets:** Fully owned distribution and warehouse facility in Miami, Florida

**181** **WISTEMA**  
2018 SALES: \$46.0M (€40.2M)

Dielheim, Germany

[WWW.WISTEMA.DE](http://WWW.WISTEMA.DE)

**Owner and managing director:** Winfried Friedel

**Products:** Catalysts; chemical intermediates; cosmetics, toiletries and personal care ingredients; food ingredients; industrial chemicals; pharmaceutical ingredients; plastics additives; polymers; reprographic chemicals/ink chemicals; solvents/distilled solvents; water treatment chemicals; waxes

**Services:** Storage; waste management (waste disposal certified); salvage recovery and re-sale; Reach consultation; contract and toll manufacturing

**Assets:** Three warehouses



Trading sales: 60%

### 182 IDEAL CHEMICAL & SUPPLY 2018 SALES: \$45.8M

**Memphis, Tennessee, US**  
[WWW.IDEALCHEMICAL.COM](http://WWW.IDEALCHEMICAL.COM)

**President:** Sam Block Jr

**Products:** Acids; alcohols; amines; chelating agents; chlor-alkali; food ingredients; glycol ethers; hydrogen peroxide; inorganics; ketones; personal care ingredients; polyglycols; solvents; textile care ingredients; water treatment chemicals

**Services:** Wholesale custom blending and packaging; distilled spirits plant; in-house QC and R&D laboratories; LTL and truckload quantities; single- and multi-compartment tanker deliveries; local warehousing and logistics; returnable and one-way containers; remote tank monitoring

**Assets:** Warehouses at four locations; liquid bulk storage; distilled spirits plant; 15 tractors; 23 trailers; six tankers

### 183 DROGAS VIGO 2018 SALES: \$45.6M

**Porrino, Pontevedra, Spain**  
[WWW.DROVIES](http://WWW.DROVIES)

**President and CEO:** Enrique Casal Lareo  
**Products:** Solvents (oxygenated, hydrocarbon, chlorinated) including in-house recycled solvents; non-organic chemicals (acids, chlor-alkalis), paper chemicals; thinner formulations; food ingredients; pharmacopeia chemicals; industrial lubes and waxes; surfactants; water treatment chemicals; resins and silicones; paraffins; fillers and pigments; mining chemicals

**Services:** Warehousing and supply chain services; ADR transport via own fleet; automotive expertise; JIT delivery, vendor managed inventory; telemetry; chemicals vessel reception and bulk storage; filling; labelling; packaging drumming; R&D; e-platforms, e-invoicing

**Assets:** 60 storage tanks in Spain; warehouse in Spain; recycling unit with 16 tanks; three road tankers; five trailers ADR certified; 44 storage tanks in Portugal

### 184 FBC CHEMICAL 2018 SALES: \$45.5M

**Mars, Pennsylvania, US**  
[WWW.FBCHEM.COM](http://WWW.FBCHEM.COM)

**President:** Mark Hudac

**Products:** Solvents; resins; surfactants; silicones; asphaltic coatings; waterproofing

membranes

**Services:** Bulk storage; blending; packaging; lab services

**Assets:** Five warehouses; three manufacturing facilities; 29 trucks (straight, tanker, tractor, trailers)

### 185 UNITED CHEMICAL GROUP (UCG) 2018 SALES: \$43.5M

**Moscow, Russia**

[WWW.UCGRUS.COM](http://WWW.UCGRUS.COM)

**Chairman and CEO:** Gennadiy Tolstobrov

**Products:** ABS; ASA; SAN; HIPS; PC/ABS; PBT; PMMA; POM; SBS; SEBS; SIS; POE; EVA; HDPE; PP copolymers; PA and AIM; road construction materials (cellulose stabilisers, plasticizers, emulsions; adhesion additives); oil additives and modifiers; base oils; fertilizers; liquid chemicals

**Services:** Logistics; packaging; storage; technical support

**Assets:** Eight offices; nine warehouses

### 186 COAST SOUTHWEST 2018 SALES: \$43.3M

**Placentia, California, US**

[WWW.COASTSOUTHWEST.COM](http://WWW.COASTSOUTHWEST.COM)

**President:** Joseph C Cimo

**Products:** Surfactants; silicones; personal care ingredients; preservatives; oleochemicals

**Services:** Liquid blending; liquid bulk transportation; storage; drumming; formulating

**Assets:** Seven locations; six trucks; applications laboratory

### 187 VERQUIMICA 2018 SALES: \$42.4M

**Guarulhos, Sao Paulo, Brazil**

[WWW.VERQUIMICA.COM.BR](http://WWW.VERQUIMICA.COM.BR)

**President:** Vera Lucia de Oliveira Franco

**Products:** Methanol; hexane; white spirit; toluene; caustic soda liquid and flakes; amyl acetate; ethyl acetate; acetone; isopropanol; MEK; cyclohexanone; isophorone; methylene chloride; perchloroethylene

**Services:** Blending; packaging; storage

**Assets:** Own plant with storage for liquid products in 63 tanks; own laboratory; four platforms for loading and unloading liquid products

**Trading sales:** 30%

### 188 CHEMICAL DISTRIBUTORS INC 2018 SALES: \$42.2M

**Buffalo, NY**

[WWW.QUIMITECNICA.COM](http://WWW.QUIMITECNICA.COM)

**President:** Mark Russell

**Products:** Acids; alkalis; solvents; laboratory chemicals

**Services:** Blending; packaging; storage; bulk,



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

LTL delivery; laboratory testing

**Assets:** 12 trucks; 12 tankers; 10 trailers; warehousing

### 189 HENRY HIRSCHEN

2018 SALES: \$42M

Buenos Aires, Argentina

[WWW.HIRSCHEN.COM.AR](http://WWW.HIRSCHEN.COM.AR)

**President:** Miguel Hirschen

**Products:** Glycols; surfactants; amines; biocides; solvents; inorganics; food ingredients; pharmaceutical ingredients; oil and gas specialties; colourants

**Services:** Storage; packaging; blending; trading; same day deliveries; financing; tailor-made solutions to customers

**Assets:** Warehouse

**Trading sales:** 2%

### 190 NATIONAL CHEMICAL

2018 SALES: \$41.9M

Dublin, Ireland

[WWW.NCC.IE](http://WWW.NCC.IE)

**Managing director:** Alan Looney

**Products:** Full range of chemicals; food ingredients; performance polymers

**Services:** ISO 13485 cleanroom medical compounding plant via JV Innovative Polymer Compounds (IPC)

**Trading sales:** 70%

### 191 A. + E. FISCHER-CHEMIE

2018 SALES: \$41.5M (€36.2M)

Wiesbaden, Germany

[WWW.FISCHER-CHEMIE.DE](http://WWW.FISCHER-CHEMIE.DE)

**General manager:** Manuel Fischer-Bothof

**Products:** Caustic soda; solvents; hydrochloric acid; citric acid; urea; phosphoric acid; matting agent; pyrogenic silicon dioxide; precipitated silica; silicone oil; glycerine; caustic potash; sodium bicarbonate; hydrogen peroxide; activated carbon; sodium persulfate

**Services:** Storage; packaging; mixing; exporting

**Assets:** Two warehouses for solid and liquid products; 16 trucks

### 192 QUELARIS

2018 SALES: \$40.7M

Panama City, Panama

[WWW.QUELARIS.COM](http://WWW.QUELARIS.COM)

**CEO:** Paul Vanhauw

**Products:** Polyurethanes; rubber; coatings; personal and home care ingredients; adhesives

**Services:** Technical sales and service; local warehousing; immediate dispatch;

repackaging

**Assets:** 13 countries distribution network - Bolivia, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru and Caribbean Islands

**Trading sales:** 14%

### 193 DUTCH2

2018 SALES: \$40.3M (€35.2M)

Purmerend, Netherlands

[WWW.DUTCH2.COM](http://WWW.DUTCH2.COM)

**Managing director:** Steven Willekes

**Products:** Acetates; acids; acrylates; alcohols; amines; aromatics; chlorinated solvents; glycol ethers; glycols; hydrocarbons; ketones; monomers; vegetable oils; propylene glycol ethers; plasticizers

**Services:** Trading; export; drumming; warehousing; logistics; blending; packaging; storage; consignment stocks

**Assets:** Two offices; several local warehouses; over 50 returnable IBCs

**Trading sales:** 30%

### 194 DAXX

2018 SALES: \$40M

Houston, Texas, US

[WWW.DAXXGRP.COM](http://WWW.DAXXGRP.COM)





**President:** Jean Marie Diederichs  
**Products:** Solvents; aromatics; glycol ethers; esters; alcohols; isocyanates; amines; specialty chemicals  
**Services:** Blending; packaging; storage; rail-car, tanker, ISO tank, vessel shipments  
**Assets:** One warehouse; four trucks; four tanks  
**Trading sales:** 20%

### 195 EQUILEX 2018 SALES: \$39.8M (34.7M)

**Schiedam, Netherlands**  
**WWW.EQUILEX.COM**  
**Managing director:** Cees Verdel  
**Products:** Higher olefins; alkylphenols; alkylbenzenes; ethanolamines; ethylene glycols; solvents; performance intermediates; phenol; aromatics; tackifying resins; isophorone; diacetone alcohol  
**Services:** Marketing; storage; packaging; sea, rail and road transportation; customs services; Reach regulation services  
**Trading sales:** 20%

### 196 VIVION 2018 SALES: \$39M

**San Carlos, California, US**  
**WWW.VIVIONINC.COM**  
**President:** Michael Poleselli  
**Products:** Acidulants; sweeteners; humectants; preservatives; chelants; hydrocolloids; surfactants; vegetable oils; antifoams; tabletting aids; micronutrients; vitamins; minerals  
**Services:** VivAssure testing  
**Assets:** Two offices/warehouses; one truck

### 197 LINKERS CHEMICALS & POLYMERS 2018 SALES: \$38.3M

**Dubai, UAE**  
**WWW.LCP.AE**  
**Managing director:** Malik Pervez Zaman  
**Products:** Synthetic rubber; PVC; engineering plastics; plasticizers; latex; monomers; construction chemicals; animal nutrition; coatings chemicals  
**Services:** Market expansion; technical support  
**Trading sales:** 100%

### 198 GJ CHEMICAL 2018 SALES: \$38M

**Somerset, New Jersey, US**  
**WWW.GJCHEMICAL.COM**  
**CEO:** Diana Colonna  
**Products:** Acrylates and monomers; high purity solvents; reagent chemicals; ketones; monomers; plasticizers; acids and anhydrides; aromatic solvents; chlorinated solvents; cosmetic preservatives; esters; glycol

ethers; glycols; heat transfer fluids  
**Services:** Testing; bulk storage; repackaging; liquid bulk handling; custom blending; purifying; stabilising  
**Assets:** Three locations; seven trucks; 30 tankers; 10 box trucks; full analytical laboratory  
**Trading sales:** 10%

### 199 SULATLANTICA 2018 SALES: \$38M

**Rio de Janeiro, Brazil**  
**WWW.SULATLANTICA.COM.BR**  
**CEO:** Leonardo Roisman  
**Products:** Chemicals for oil and gas, mining, glass, agriculture, food and feed industries (organic chemicals, inorganic chemicals, solvents, emulsifiers, viscosifiers)  
**Services:** Importing; exporting; distributing; packaging; blending  
**Assets:** Four warehouses; 20 tanks; one office building

### 200 RESEARCH SOLUTIONS GROUP 2018 SALES: \$36.5M

**Pelham, Alabama, US**  
**WWW.RESEARCHSOLUTIONSGROUP.COM**  
**CEO:** Jeff Miller  
**Products:** Organic and inorganic chemicals; dry chemicals; solvents and solvent blends; pharmaceutical ingredients; specialty chemicals; specialty compounds; HAPs free low VOC chemistry  
**Services:** Custom blends; toll packaging; custom toll blending and formulating; lab services; ethanol denaturing; transloading; contract transportation services; warehousing; certified DOT and OSHA trainers; HAZ and NON-HAZ waste management services  
**Assets:** Four bulk facilities with warehousing; rail transload facility; four satellite warehouses; 22 power units; 17 tank trailers; 10 dry vans; two DSP permitted ethanol denaturing facilities

### 201 INDEPENDENT CHEMICAL 2018 SALES: \$35.3M

**Glendale, New York, US**  
**WWW.INDEPENDENTCHEMICAL.COM**  
**President:** Jonathan Spielman  
**Products:** Caustic soda; paper chemicals; solvents; aromatics; cosmetics specialties; food specialties; pharmaceutical and nutrition specialties; surfactants; alkalis; acids; glycols; oxidizers; phosphates  
**Services:** Food grade dry blending and packaging; pharmaceutical repackaging; liquid filling and repackaging  
**Assets:** One warehouse; five trailers; three tankers; one straight truck

### 202 NORTHSPEC CHEMICALS 2018 SALES: \$35M

**Toronto, Ontario, Canada**  
**WWW.NORTHSPEC.COM**  
**Principal and president:** Noel Shahnazarian  
**Products:** Epoxy resins and hardeners; aliphatic and aromatic urethanes and polyols; acrylic resins; pigments and additives; coatings materials; graphic arts materials; construction chemicals; floor care chemicals; composites; adhesives; plastics and rubbers  
**Services:** Inventory management; logistics  
**Assets:** Six warehouse facilities across Canada; one head office  
**Trading sales:** 5%

### 203 BRISCO DO BRASIL 2018 SALES: \$35M

**Sao Paulo, Brazil**  
**WWW.BRISCO.COM.BR**  
**WWW.BRISCOPC.COM**  
**CEO:** Guillermo Castillo  
**Products:** Styrene monomer; thermoplastics (PE, PS, EPS, ABS, PC); acrylates; plastizisers, solvents  
**Services:** Distribution; logistics; warehousing; blending; agent services  
**Assets:** 2 warehouses; 3 offices; 10 trucks  
**Trading sales:** 30%

### 204 MY-CHEM 2018 SALES: \$34.7M (€30.3M)

**Buchholz, Germany**  
**WWW.MY-CHEM.DE**  
**CEO and owner:** Ralf Meinecke  
**Products:** Phthalic anhydride; maleic anhydride; styrene; mono-pentaerythritol; di-pentaerythritol; paraformaldehyde; tall oil products; heat transfer fluids; silicate dispersions; trimellitic anhydride; purified isophthalic acid; purified terephthalic acid; sodium formate  
**Services:** Storage; transportation  
**Trading sales:** 5-10%

### 205 R.E. CARROLL 2018 SALES: \$34.6M

**Trenton, New Jersey, US**  
**WWW.RECARROLL.COM**  
**CEO:** Robert E Carroll III  
**Products:** Calcium carbonate; clays; blowing agents; alumina trihydrate; zinc oxides; plasticizers; foaming agents; barium sulfate; petroleum products (aromatic oils, naphthenic oils); magnesium oxide; stearates; soybean oils; lubricants; ASTM reference oils  
**Services:** Repackaging; storage  
**Assets:** Corporate office and warehousing in New Jersey; warehouse locations in Cali-

# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

fornia, Ohio, Georgia and Texas

### 206 BRUGUES 2018 SALES: \$34.4M (€30M)

Viladecans, Barcelona, Spain

[WWW.BRUGUES.COM](http://WWW.BRUGUES.COM)

**CEO:** Raimon Bruges Sintes

**Products:** Acetone; bencile alcohol; diacetone alcohol; dipropylenglicol; ethyl acetate; formic acid; isobutyl alcohol; isopropyl acetate; methyl ethyl ketone; methyl isobutyl ketone; metoxipropilo acetate; n-propanol; phosphoric acid; propylene glycol USP; trietanolamine

**Services:** Packaging; mixtures, solutions and dilutions

**Assets:** Warehouses

**Trading sales:** 20%

### 207 MCKINN INTERNATIONAL 2018 SALES: \$34.2M

Singapore

[WWW.MCKINN.COM.SG](http://WWW.MCKINN.COM.SG)

**Managing director:** Chau Tak Vui

**Products:** Raw materials for adhesives; coatings materials; UPR, PU and TPU; plastics additives; flame retardants; acids and anhydrides; oleochemicals; plasticizers; rubber additives; water-based acrylic resins

**Services:** Sourcing

**Assets:** Third-party warehouse

**Trading sales:** 85%

### 208 ACID PRODUCTS 2018 SALES: \$34.1M

Chicago, Illinois, US

[WWW.ACIDPRODUCTS.NET](http://WWW.ACIDPRODUCTS.NET)

**President:** Jann Fisher

**Products:** Caustic soda; paper chemicals; solvents; aromatics; acids; caustics; surfactants; dry chemicals; solvents; hydrogen peroxide

**Services:** Toll blending; contract packaging; powder blending; bulk storage

**Assets:** 2 locations, including 250 acres in Indiana with rail service; 8 powder blenders; 30 liquid blending tanks; 8 trucks; 2 onsite chemists; a high pressure homogenizer

### 209 VECKRIDGE CHEMICAL 2018 SALES: \$33M

Kearny, New Jersey, US

[VECKRIDGECHEMICAL.COM](http://VECKRIDGECHEMICAL.COM)

**President:** Mark Veca

**Products:** Inorganics; amines; acids; chlor-alkali; specialty chemicals; food ingredients

**Services:** Packaging; dilution; storage

**Assets:** 5 trucks; 3 warehouses

### 210 LUMAR 2018 SALES: \$32.6M (€28.5M)

Barcelona, Spain

[WWW.LUMARQUIMICA.COM](http://WWW.LUMARQUIMICA.COM)

**President:** Lluís Ribera; **CEO:** Bruno Saillant

**Products:** Antioxidants; corrosion inhibitors; antiwear/EP additives for lubes; fatty acids; fatty alcohols; surfactants; polyalphaolefins; esters; polyisobutene; polyalkylene glycols; silicone oils; phosphate esters; PTFE; friction modifiers; antifoams; tackifiers; antimists; pour point depressants; viscosity index improvers; OCP; amines

**Services:** Warehousing and storage; repackaging; blending; sampling; technical service; training; formulating

### 211 RADCHEM PRODUCTS 2018 SALES: \$32.1M

Orland Park, Illinois, US

[WWW.RADCHEMINC.COM](http://WWW.RADCHEMINC.COM)

**President:** William M Radostits

**Products:** Chemicals and solvents; acetates; alcohols; aliphatic and aromatic hydrocarbons; glycol ethers; process and base oils; reuse solvents; resins; ketones; K-1 kerosene

**Services:** Transport via railcar, tanker, drums, totes; blending

**Assets:** Dedicated owned trailer

### 212 T.Z GROUP (INCLUDES TZ TRADING, TAU CHEMICALS, TREZA) 2018 SALES: \$31.6M

Mexico City, Mexico

[WWW.TREZA.COM.MX](http://WWW.TREZA.COM.MX)

[WWW.TAUCHEMICALS.COM](http://WWW.TAUCHEMICALS.COM)

**President:** Fernando J Zavala

**Products:** Caustic soda; chlorine; sodium hypochlorite; sulfuric acid; sodium carbonate; sodium chloride; calcium chloride; sodium bicarbonate; hydrogen peroxide; fosforic acid; organic phosphonates HEDP ATMP, PBTC; clorhidric acid; sodium metabisulfite; acetic acid; acetic anhydride

**Services:** Packaging; transport and logistics; storage; dilution, blending

**Assets:** Five warehouses; 28 trucks and 35 tank trucks

**Trading sales:** 9.28%

### 213 INDUSTRIAL CHEMICALS CORP 2018 SALES: \$30.2M

Arvada, Colorado, US

[WWW.INDUSTRIALCHEMPCORP.COM](http://WWW.INDUSTRIALCHEMPCORP.COM)

**President:** Robert L Wilson II

**Products:** Acetates; acids; aliphatic and aromatic solvents; alcohols; biofuel chemicals; CBD extraction chemicals; chelating agents; chlor-alkali products (caustic soda, KOH); detergent chemicals; glycols and glycol



ethers; heat transfer fluids; hydrogen peroxide; ketones; metal finishing chemicals; oil-field chemicals; organic and inorganic chemicals; pharmaceutical chemicals; surfactants; water treatment chemicals

**Services:** Contract blending; proprietary blends; transloading; warehousing

**Assets:** Three warehouses; 25 tankers; 10 tractors; five vans; bulk storage; rail siding

### 214 SAMECA PQ 2018 SALES: \$29.8M (€26M)

Porto, Portugal

[WWW.SAMECAPQ.COM](http://WWW.SAMECAPQ.COM)

**CEO:** Eduardo Moura e Sár

**Products:** Additives for food, plastics and rubber; coating and resins; solvents; inorganic chemicals; pigments, organic and inorganic; coatings; resins; personal care, cosmetics and detergent chemicals; effect chemicals; resin intermediates

**Services:** Storage, bulk and solids; packaging; own road fleet for distribution

**Assets:** Six trucks; two owned warehouses plus three rented ones

**Trading sales:** 40%





**Founder and managing director:** Dilip Shah; **CEO and executive director:** Shamik Shah

**Products:** Plastics additives; aroma chemicals; pharmaceutical excipients; pharmaceutical intermediates; cosmetic ingredients; essential oils; feed and food ingredients; oil-field chemicals; water treatment chemicals; fine chemicals

**Services:** Packaging; warehousing; sourcing; indenting; technical services; contract manufacturing

**Assets:** office; four warehouses

**Trading sales:** 20%

### 219 GULF COAST CHEMICAL 2018 SALES: \$26.3M

**Abbeville, Louisiana, US**

[WWW.GULFCOASTCHEMICAL.COM](http://WWW.GULFCOASTCHEMICAL.COM)

**Managing member:** Jim Fusilier

**Products:** Glycols; methanol; ethanolamines; coolants; lubricants; antifreeze; heat transfer fluids; production chemicals; wireline lubes; specialty frac and completion fluids

**Services:** Blending; storage; laboratory services; chemical treatment programs; operator training

**Assets:** Seven company operated facilities; warehousing; bulk storage; laboratory facility; 21 delivery trucks; two tankers; six service trucks

**Trading sales:** < 10%

### 220 SEELER INDUSTRIES 2018 SALES: \$26.1M

**One Genstar Drive, Joliet, Illinois**

[WWW.SEELER.COM](http://WWW.SEELER.COM)

**CEO:** Steve Seeler

**Products:** Hydrogen peroxide; peracetic acid; glacial acetic acid; propylene glycol; sodium gluconate; caustic soda; hydrochloric acid; soda ash; DDBSA; sodium chlorate; phosphoric acid; quaternary compounds; other specialty chemicals

**Services:** Tank storage; railcar unloading; blending; liquid packaging; bagging; transloading; warehouse storage; property rental; trucking; laboratory services

**Assets:** warehousing; five trucks; 10 liquid and box trailers; 27 aboveground storage tanks; seven rail spurs; overhead rail trestle

### 221 JNS-SMITHCHEM 2018 SALES: \$25M

**Paterson, New Jersey, US**

[WWW.JNS-SMITHCHEM.COM](http://WWW.JNS-SMITHCHEM.COM)

**CEO:** Darren Jachts

**Products:** Minerals; resins; additives; pigments; specialty chemicals

**Services:** Storage; packaging

### 215 SAL CHEMICAL 2018 SALES: \$29.8M

**Weirton, West Virginia, US**

[WWW.SALCHEM.COM](http://WWW.SALCHEM.COM)

**President:** Steve Fenell

**Products:** Acids; alkalis; calcium chloride; inorganics; oil and gas; solvents; water and waste treatment chemicals

**Services:** Dry bulk and packaging; liquid bulk and packaging; blending; storage

**Assets:** One warehouse; 12 trucks; 16 trailers

### 216 MORAIS DE CASTRO 2018 SALES: \$29.1M (R112.9M)

**Salvador, Bahia, Brazil**

[WWW.MORAISDECASTRO.COM.BR](http://WWW.MORAISDECASTRO.COM.BR)

**CEO:** Andre Castro

**Products:** Surfactants; glycols; white mineral oils; caustic soda; sulfonic acid (LAB-S); inorganic acids; sodium hypochlorite; personal care additives; food ingredients and flavours; rheology modifiers; oxygenated solvents; chlorinated solvents; biocides; sulfates; silicones

**Assets:** Two warehouses; 15 trucks; one bulk storage facility; one refrigerated facility

### 217 VENUS CHEMICALS GROUP 2018 SALES: \$29M

**Cairo, Egypt**

[WWW.VENUSKIM.COM](http://WWW.VENUSKIM.COM)

**CEO:** Ahmed Jamal Alghoul

**Products:** Glycerine; nonyl phenol ethoxylates; fatty alcohol ethoxylates; polysorbate ethoxylates; castor oil ethoxylates; soya lecithin; latex; defoamers; thickeners; white spirit; pine oil; maleic resin; gum rosin; hydrocarbon resin; SLES 70; fragrances; coatings materials; chewing and bubble gum ingredients; detergent chemicals; cosmetics ingredients

**Assets:** Three warehouses; 10 jumbo trucks; six cars

**Trading sales:** 70%

### 218 MONACHEM GROUP 2018 SALES: \$27.0M (RS1.88BN)

**Vadodara, Gujarat, India**

[WWW.MONACHEM.COM](http://WWW.MONACHEM.COM)



# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

### 222 LAKE CHEMICALS AND MINERALS

2018 SALES: \$22.9M (€20M)

Redditch, UK

[WWW.LAKECM.CO.UK](http://WWW.LAKECM.CO.UK)

MD: Dr Steven Cartledge

**Products:** Speciality chemicals for coatings; adhesives; corrosion removal and inhibition; construction, lubricants, flame retardants, pharmaceutical, cosmetics, personal and home care, rubber, plastics, electronics, water treatment, food, nutrition, flavours

**Services:** Technical sales and marketing; application development; warehousing; quality control; regulatory services; blending and packing; contract research and manufacturing service

**Assets:** Research and development laboratories for food and personal care; BRC AA-graded and MHRA certified warehouse

### 223 SEACOLE

2018 SALES: \$22M

Plymouth, Minnesota, US

[WWW.SEACOLE.COM](http://WWW.SEACOLE.COM)

President and CEO: Gregg Elliott

**Products:** Electronic processing chemicals (printed and integrated circuit); surface finishing/plating chemicals; industrial cleaning detergents; odour control chemicals; transportation cleaning and maintenance; laboratory reagents; fine chemical ingredients; water treatment chemistry

**Services:** Custom and contract blending and packaging; private label blending and packaging; logistics

**Assets:** Warehouse/manufacturing/headquarters; trucks

### 224 WHITCHEM

2018 SALES: \$20.9M (£16.4M)

Newcastle-Under-Lyme, Staffordshire, UK

[WWW.WHITCHEM.CO.UK](http://WWW.WHITCHEM.CO.UK)

Managing director: Charles Hawley

**Products:** Resins and polymers; pigments; fillers and additives for adhesives and sealants; coatings and inks ingredients; plastics and rubber additives; construction and refractory materials; textiles processing and finishing chemicals; additives for agriculture and horticulture chemicals; filtration media for liquid/solid separation

**Services:** Storage and logistics for UK and Ireland; specialist technical support; project development; formulation advice; agency sales

**Assets:** Sales office and warehouses

### 225 MONARCH CHEMICALS

2018 SALES: \$20.9M (£16.4M)

Sheerness, Kent, UK

[WWW.MONARCHCHEMICALS.CO.UK](http://WWW.MONARCHCHEMICALS.CO.UK)

Chairman: Phillip Copeland

**Products:** Glycerine; glycols; citric acid; formic acid; amines; sodium sulphide; caustic soda; hydrochloric acid; sodium hypochlorite; epichlorohydrin; cinnamic acid; propionic acid; nitric acid; agricultural silage and performance additives; fertilisers and feed products

**Services:** Warehousing; liquid and powder blending; dilutions; toll manufacturing; packed and bulk UK distribution; inventory management; supplier reduction; just-in-time delivery; global sourcing

**Assets:** Two distribution locations with bulk and packed storage; offices; four purpose-built trucks

**Trading sales:** 18%

### 226 MATRIX CHEMIE

2018 SALES: \$20.4M (£16M)

Stourton, Leeds, UK

[WWW.MATRIXCHEMIE.COM](http://WWW.MATRIXCHEMIE.COM)

Chairman and CEO: Graham Royle

**Products:** Surfactants; oleochemicals; personal care ingredients; homecare and I&I specialities; antiperspirant actives; essential oils; phosphates; water treatment chemicals; emulsion polymerisation adjuncts; suncare ingredients

**Services:** Supply chain management; import and export; warehousing

**Assets:** One facility (offices and warehouse)

**Trading sales:** 20%

### 227 KLAUS F. MEYER

2018 SALES: \$19.4M (£16.9M)

Fussgoenheim, Germany

[WWW.KLAUSFMEYER.DE](http://WWW.KLAUSFMEYER.DE)

Managing directors: Martina Magnie, Frank Meyer

**Products:** Hydroxylamine sulphate; hydroxylamine hydrochloride; triflic acid; MEKO; nitromethane; isocyanuric acid; BHT; p-toluenesulfonic acid; n-isopropyl-hydroxylamine; TMEDA; anthranilic acid; agrochemicals; pharmaceuticals; specialty chemicals; catalysts

**Services:** Door-to-door-service; refilling of triflic acid; handling of dangerous goods; stock-holding; ISO tanks

**Assets:** Five warehouses; own office in Shanghai-Puxi, China; laboratory for sample handling

### 228 BIACHEM

2018 SALES: \$19.0M

London, UK

[WWW.BIACHEM.COM](http://WWW.BIACHEM.COM)

Managing director: Bob Beaumont

**Products:** Caustic soda; chlorine; sodium

sulphate; sodium chloride; EDTA; NTA; GLDA; surfactants; sodium percarbonate; magnesium chloride; potassium chloride; sodium hydrosulphite

**Services:** Repackaging; blending; dilution

**Assets:** Five contract warehouses in UK and Ireland

### 229 THE WHITE SEA & BALTIC COMPANY

2018 SALES: \$18.9M (£14.8M)

Leeds, UK

[WWW.WHITESEA.CO.UK](http://WWW.WHITESEA.CO.UK)

Managing director: Alan Carradice

**Products:** Surfactants; fatty acids; oleochemicals; biocides; suncare UV absorbers; personal care products; epoxy resin; reactive diluents; benzoic acid; lactate esters; tall oil fatty acid; alkyl polyglycosides

**Services:** Storage; packaging; sourcing

**Assets:** Office; group warehouse

**Trading sales:** 35%

### 230 EAGLE ALCOHOL

2018 SALES: \$18.7M

St Louis, Missouri, US

President: Daniel J Croghan

**Products:** Ethyl alcohol; organic ethanol; glycols; glycol ethers

**Services:** Blending; packaging; storage

**Assets:** Three tractors; 12 tankers; one box trailer; warehouse

### 231 COMINDEX

2018 SALES: \$18.3M (£16M)

Barcelona, Spain

[WWW.COMINDEX.ES](http://WWW.COMINDEX.ES)

CEO: Ana-Cristina Arp

**Products:** Defoamers and air release additives; surface additives; wetting and dispersing additives; polyurethanes; acrylics; styrene-acrylic hybrids; UV-curable dispersions and polyols; epoxy resins and reactive diluents; alkyd emulsions; linseed and castor oils and derivatives; organic, inorganic, aluminium, effect and pearl pigments and pigment dispersions; wax additives; additives for thermoplastics; coupling agents; rheology modifiers; adhesion promoters; corrosion inhibitors

**Services:** Technical assessment; storage; agency sales; training; testing

**Assets:** warehouse; office space

### 232 SCHIBLEY SOLVENTS AND CHEMICALS

2018 SALES: \$17.5M

Elyria Ohio, US

[WWW.SCHIBLEY.COM](http://WWW.SCHIBLEY.COM)

President: Reed Schibley

**Products:** Surfactants; chelates; organic peroxide initiators; fatty acids; FRP equipment; fiberglass reinforcements; unsaturated polyester resins; gelcoats; solvents; thickeners and release agents

**Services:** Industrial chemical distribution; storage; packaging; blending; trucking and delivery services

**Assets:** Warehouses; three semi-trucks and three temperature-controlled trailers

**Trading sales:** 10%

**233 KEMAT**  
**2018 SALES: \$17.0M (€14.8M)**

**Brussels, Belgium**

[WWW.KEMATBELGIUM.COM](http://WWW.KEMATBELGIUM.COM)

**Managing director:** Simon Mason

**Products:** Polyisobutenes including proprietary blends; polyalphaolefins including low and high viscosity and metallocene; lubricant auxiliaries such as castor and linseed oils, molybdenum disulphide and 12-hydroxystearic acid; fuel additives (Keropur) with BASF technology

**Services:** Blending; bulk storage; drumming; outsourcing; packaging; repackaging; sourcing; transport with own fleet; warehousing

**Assets:** 75 ISO containers; warehouses with drumming, blending and repackaging capability; five offices globally; internal laboratory

**Trading sales:** 7%

**234 TECNOSINTESI**  
**2018 SALES: \$16.6M (€14.5M)**

**Bergamo, Italy**

[WWW.TECNOSINTESI.COM](http://WWW.TECNOSINTESI.COM)

**Sales and marketing manager:** Michele Angius

**Products:** Adipic acid; ammonium polyphosphate; acetyl tributyl citrate; butanediol; cyclohexane-dimethanol; diallyl phthalate; hexanediol; isophthalic acid; monobutyltin oxide; monopropylene glycol; polyethylene wax; p-tert butyl phenol; tartaric acid; trimethylolpropane; zinc oxide

**Services:** Trading; general and specialties sourcing; storage; blending; repackaging

**Assets:** Four warehouses; three tractors; five trailers

**Trading sales:** 70%

**235 SAIPER CHEMICALS**  
**2018 SALES: \$15.4M (RS1.07BN)**

**Mumbai, India**

[WWW.SAIPER.COM](http://WWW.SAIPER.COM)

**Managing director:** IBV Raghavan

**Products:** Additives; amines; C4 chemicals; coalescing aids; glycol ethers; propylene

glycols; 1-2 diaminocyclohexane; 2-ethylhexyl acetate; 2-ethylhexylglycerin; caprylyl glycol; dimethyl succinate; di-n-butyl ether; isoamyl alcohol; vinyl-2-ethylhexanoate

**Services:** Registered with the FSSAI (supply to F&B Industries) and the FDA (supply to the pharmaceutical industry); custom blending and repackaging; drumming; market research; technical support; trend analysis; warehousing; legal compliance

**Assets:** Two offices; three warehouses (one owned); blending/formulation unit

**Trading sales:** 1-2%

**236 ROYALE GROUP (AWSM, SHORE-CHEM, ROYALE PIGMENTS)**  
**2018 SALES: \$15M**

**Paramus, New Jersey**

[WWW.ROYALEPIGMENTS-CHEM.COM](http://WWW.ROYALEPIGMENTS-CHEM.COM)

**CEO:** John Logue

**Products:** Alkali fluoroborates; fluorides; metal fluoroborates; nitrates/nitrites; borates; specialty organic and inorganic fluorines; pearlscents; fluorescents; iron oxides

**Services:** Stock and supply chain management; consulting; blending; grinding

**Assets:** Five warehouses; two converting locations

**237 EMCO-INORTECH**  
**2018 SALES: \$14.7M (C\$20M)**

**Terrebonne, Quebec, Canada**

[WWW.INORTECH.COM](http://WWW.INORTECH.COM)

**Vice president, sales and marketing:** Jean-Baptiste Moranta

**Products:** Specialty chemicals for paints and coatings - resins, additives, pigments

**Services:** R&D application laboratory services

**Assets:** Two offices, including one R&D laboratory

**238 AMERICAN CHEMIE**  
**2018 SALES: \$13.2M**

**Austin, Texas, US**

[WWW.AMERICANCHEMIE.COM](http://WWW.AMERICANCHEMIE.COM)

**President:** Paula Kamdar

**Vice president:** Mike Kamdar

**Products:** Personal care and sunscreen ingredients; food and nutrition ingredients; surfactants; animal nutrition; paints; inks; catalysts; lube oil; greases; metal-working chemicals; PVC lubricants; flame retardants; synthesis chemicals

**Services:** Logistics; imports; handling hazardous chemicals in ISO tanks; just-in-time delivery; hazmat certified; outsourcing; tolling; private labelling

**Assets:** Large inventories of chemicals in six warehouses across the US

**239 STORT CHEMICALS**  
**2018 SALES: \$11.5M (£9M)**

**Bishops Stortford, UK**

[WWW.STORTCHEMICALS.CO.UK](http://WWW.STORTCHEMICALS.CO.UK)

**Managing Director:** Richard Gilkes

**Products:** Resins; additives; colourants; fluorosurfactants; plasticisers; natural and synthetic raw materials for the fragrance and flavour industries

**Assets:** Storage and distribution

**240 AUDICHE TRADING**  
**2018 SALES: \$11.2M**

**Alexandria, Egypt**

[WWW.AUDICHE.COM](http://WWW.AUDICHE.COM)

**CEO:** Alain Audiche

**Products:** Titanium dioxide; polyvinyl alcohol; methyl ethyl ketoxime; hydrocarbon resin C9; sodium ammonium and potassium persulphates; zinc phosphates, micaceous iron oxide; glass flakes; glass beads; nano-sized TiO<sub>2</sub>; adhesion promoters; compound ferro titanium

**Services:** Agency sales

**Assets:** One office; two warehouses

**Trading sales:** 10%

**241 CLASSIC DISTRIBUTING COMPANY**  
**2018 SALES: \$11M**

**Pacoima, California, US**

[WWW.CLASSICDISTRIB.COM](http://WWW.CLASSICDISTRIB.COM)

**President:** Larry H Helscher

**Products:** Surfactants; preservatives; quaternaries; esters; emulsion bases; sunscreen; vitamin E; CBD oil; waxes; silicones; butters; polymeric thickeners

**Services:** Liquid blending; storage; technical sales

**Assets:** One warehouse; one truck; one blending operation

**242 CUSTOM CHEMICAL SERVICES**  
**2018 SALES: \$11M**

**Hitchcock, Texas, US**

[WWW.CCHEMICALS.COM](http://WWW.CCHEMICALS.COM)

**President:** Margaret Roff

**Products:** Solvents; aromatics; ketones; ethanol; alcohols; caustics; glycols; inorganics; oil and gas chemicals

**Services:** Blending; packaging; warehousing; import/export; containerisations; trans-loading; neutralisations; lab services

**243 CHEMCEED**  
**2018 SALES: \$10.0M**

**Chippewa Falls, Wisconsin, US**

[WWW.CHEMCEED.COM](http://WWW.CHEMCEED.COM)

**President:** Marimel Enderesa

# SPECIAL REPORT

## TOP 100 CHEMICAL DISTRIBUTORS

**Products:** Plasticizers; corrosion inhibitors; additives; solvents; fatty acids; alcohols; specialty chemicals; industrial chemicals; food additives

**Services:** Blending; packaging; labelling; storage; consignment; JIT delivery

**Assets:** Four warehouses

**Trading sales:** 10%

**244 CLARIQUIMICA**  
**2018 SALES: \$9.3M**

**Sao Paulo, Brazil**

[WWW.CLARIQUIMICA.COM.BR](http://WWW.CLARIQUIMICA.COM.BR)

**CEO:** Valne Lucas Vieira

**Products:** Pigments and additives; pigment dispersions; paper and textile chemicals; iron oxide; dyes for paper and textiles; caustic soda; carbon black

**Services:** Blending and packaging

**Assets:** Warehouse; one truck

**Trading sales:** 75%

**245 SMA COLLABORATIVES**  
**2018 SALES: \$8.9M**

**Cincinnati, Ohio, US**

[WWW.SMACOLLABORATIVES.COM](http://WWW.SMACOLLABORATIVES.COM)

**President:** Saad Ashoor

**Products:** Personal care ingredients

**Services:** In-house extraction; blending; testing and free formulations support

**Assets:** Innovation office/lab in Seoul, South Korea; headquarter/warehousing in Cincinnati; applications lab and warehouse in south Florida; office and sales in Bogota, Colombia

**Trading sales:** 30%

**246 A.S. PATERSON**  
**2018 SALES: \$5.5M (C\$7.5M)**

**Toronto, Ontario, Canada**

[WWW.ASPATERSON.COM](http://WWW.ASPATERSON.COM)

**CEO:** Rod Paterson

**Products:** Pigments; pigment dispersions; dyes, micronised waxes; wax emulsions; foam control products; acrylic emulsions; polyurethane dispersions; polyester resins; nitrocellulose; amino resins; isocyanates; corrosion control chemicals; concrete admixtures; fragrances

**247 DAKRAM MATERIALS**  
**2018 SALES: \$4.0M (£3.12M)**

**Biggleswade, Bedfordshire, UK**

[WWW.DAKRAM.COM](http://WWW.DAKRAM.COM)

**Managing director:** Kate Mingay

**Products:** Inorganic metal-based chemicals; agricultural chemicals; animal feed and nutrition ingredients; catalysts; water treatment chemicals; electronic ceramics; ceramics; glass; bakery products; metal treatment; welding chemicals

**248 HIGGI**  
**2018 SALES: \$1.9M (£1.5M)**

**Wrexham, UK**

[WWW.HIGGI.CO.UK](http://WWW.HIGGI.CO.UK)

**Managing director:** April Davies

**Products:** Ferrous-based chemicals (iron); ammonium sulphate; magnetite; play sand

**Services:** Packaging; storage; repackaging

**Assets:** Administrative office building; plant and machinery

**Trading sales:** 95%

**249 KETSIN DE COSTA RICA**  
**2018 SALES: \$1.4M**

**San Rafael, Costa Rica**

[WWW.KETSINCR.COM](http://WWW.KETSINCR.COM)

**CEO:** Cesar Marin

**Products:** Titanium; emulsions; resins; pigments; masterbatches; plastics; polyethylene; solvents; aromatics; specialty products; food additives; sanitizers; consumer products; household chemicals; personal care ingredients

**Services:** Storage; packaging

**Assets:** One warehouse; transportation fleet

**NOTE:** EMEA sales for Brenntag, IMCD, Univar listed under Europe

### CURRENCY CONVERSION RATES 31 DECEMBER 2018

\$1=  
Euro 0.8729  
British Pound 0.7837  
Swiss Franc 0.9833  
Canadian Dollar 1.3644  
Singapore Dollar 1.3623  
Brazilian Real 3.8809  
Indian Rupee 69.6049  
Australian Dollar 1.4193  
Malaysian Ringgit 4.1331  
Japanese Yen 109.7144  
Chinese Yuan 6.8783  
Thai Baht 32.3195  
Mexican Peso 19.6426  
South African Rand 14.3853  
South Korean Won 1,113.5216







# PETROCHEM

## DISTRIBUTING CHEMICALS GLOBALLY



Esters  
Alcohols  
Ethanolamines  
Hydrocarbons

Ketones  
Plasticizers  
Automotive & Performance fluids  
Glycol Ethers/Esters

Glycols  
Monomers  
Polyols  
Isocyanates

### DISTRIBUTORS AND MARKETING CHANNELS FOR

|   |   |   |   |   |   |
|---|---|---|---|---|---|
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|  |  |  |  |   |  |

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