



UK Chemical Distributor Market Report 2008

Information, insight and analysis of the
UK chemical distribution industry



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UK Chemical Distributor Market Report 2008

The definitive guide to the UK Chemical Distribution Industry in the UK



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Information, insight and analysis of the UK chemical distribution industry

Profiles on 235+ Distributors

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About the report

The research report "UK Chemical Distributor Report 2008" is a comprehensive evaluation of the present status of the chemical distribution industry in United Kingdom (UK). The report provides the latest information on market size, market structure and consolidation trends and, in addition to market and industry forecasts, also includes ranking tables for the leading companies in the sector. It also features company profiles on around 235+ UK distributors detailing ownership, financial performance, business activities and key personnel. UK Chemical Distributor Report 2008 also analyses the key market drivers shaping the chemical distribution industry, highlighting opportunities, threats and factors critical to success in the future together with checklists for distributors to help with business planning.

"The survey provides an authoritative overview of the UK's chemical distribution sector. Using both quantitative and qualitative information, it offers a number of fascinating insights into our industry and the changes it has experienced over recent years."

Peter Newport, CBA



Contents

- Foreword by the Chemical Business Association
- Size of the UK Chemical Distribution market
- Industry consolidation trends
- Industry benchmark performance
- Top 25 chemical distributor rankings
- Future market drivers
- Customer market forecasts
- Industry forecasts 2008-2012
- Checklists to help with business planning
- Profiles on 235+ UK chemical distributors

"All Content, No filler"

This report has been written with chemical distributors and manufacturers in mind and, unlike many industry reports, does not contain superfluous material or 'padding'. UK Chemical Distributor Market Report 2008 only contains relevant information and analysis about the industry.

- published Mar 2008
- 430+ pages
- £895 plus VAT

Abstract

UK Chemical Distributor Report 2008

Information, insight and analysis of the UK Chemical Distribution Industry

Keywords: [chemical distributors, specialty chemical distributors, commodity distributors, national distributors, full-range chemical distributors, polymer distributors, chemical traders, agents, chemical supply chain, UK chemical distribution, UK chemical industry, EU chemical distribution, EU chemical industry]

Overview

The research report “UK Chemical Distributor Report 2008” by Chemagility is a comprehensive evaluation of the present status of the chemical distribution industry in United Kingdom (UK). The report provides the latest information on market size, market structure and consolidation trends and, in addition to market and industry forecasts, also includes ranking tables for the leading companies in the sector. It also features company profiles on around 240 UK distributors detailing ownership, financial performance, business activities and key personnel. UK Chemical Distributor Report 2008 also analyses the key market drivers shaping the chemical distribution industry, highlighting opportunities, threats and factors critical to success in the future together with checklists for distributors to help with marketing planning.

Market Analysis

The UK chemical distribution industry has been growing extensively, thanks to the restructuring of the chemical industry, outsourcing trends, increased international trade and the market entry of Asian producers.

Chemagility estimate the size of the UK chemical distribution market at £2.7bn (€3.75Bn) in 2006. This represents approximately 10% of the total* European chemical distribution market worth around €35bn in value terms.

**including EU-27, Norway, Switzerland, remaining CEE countries, Russia and Ukraine*

In future, although volume growth in the manufacturing industries served by UK chemical distributors won't be spectacular it should be reasonably stable and positive. Strong sales growth is expected as a result of continuing outsourcing trends in favour of distributors and chemical price inflation. However, rises in the price of chemicals will be the most significant factor as the industry comes to terms with REACH and increasing energy and distribution costs. Overall, the UK chemical distribution market is expected to grow with a CAGR of 6.0-6.5% during 2008-2012.

Abstract

Highlights

UK chemical distributor rankings. Top 25 UK Chemical Distributor Rankings, including the position of the leading international groups in the UK, top speciality, commodity and niche distributors.

- **Analysis of the key market drivers.** Detailed analysis of the market drivers shaping the future prospects for UK chemical distributors including:
 - The business implications of REACH – the threats and opportunities presented by the legislation.
 - How energy, oil and petrochemicals supply and pricing will affect the industry
 - The impact the future development of China will have on the UK chemical distribution industry
 - How the long-term effects of consumer and Government pressure on climate change and sustainable development will change the business environment for UK chemical distributors.
 - Finally a look at the ways the EU competition rules will change the nature of the relationship between chemical producers and their distributors

Each section contains a summary checklist for chemical distributors to help with future business planning.

- **Customer Markets Forecasts.** The outlook in the key manufacturing markets served by chemical distributors including forecast market growth rates from independent sources and Chemagility's survey of 70 chemical distributors.
- **Industry Forecasts 2008-2012.** Market size and future market structure. Numbers and types of distributors.
- **Profiles on UK Chemical Distributors.** Profiles on around 240 chemical distributors including financial indicators such sales, profitability and performance as well as information on business activities, markets served, products supplied and services provided.

Market Study Findings

Over 70 in-depth interviews with senior managers from a cross-section of distributor companies were carried out in the process of creating the report. Some of the findings included:

- Overall UK chemical distributors are expecting on average volume growth of 1.5% per annum over the next 12-18months across all the markets they supply.

Abstract

- Over 60% of companies surveyed said they were considering either expanding their businesses geographically and/or entering new market areas over the next 12-18 months.
- In the last 12 months chemical distributors have on average taken on 3 new Principals or suppliers most commonly originating from Asia, and typically have had their largest Principals for nearly 20 years.

Key Issues and Facts Analysed

How does the UK chemical distribution market compare to the EU?
What is the size of UK chemical distribution industry segmented by company size and type (function)?
Which forces are driving the chemical distribution industry in UK?
What are the opportunities and challenges for chemical distributors in UK?
Who are the key players operating in the market?

Research Methodology Used

The report has been compiled using qualitative and quantitative information sourced from a wide section of knowledgeable industry bodies and authoritative publications, as well as, information published in the wider media.

In the process of collecting qualitative data for the report over 70 depth personal and telephone interviews were conducted with senior executives representing small, medium, and large chemical distributors and selected from a cross section of industry sectors.

Analysis Methods: various statistical techniques and analysis using software tools. Judgmental forecasting and cause and effect analysis have been used in the report for prudent analysis.

Definition of “Chemical Distributor” in the context of this report

The term ‘chemical distributor’ has different interpretations within the global chemical community. In the context of the report the term is defined by and only includes those companies fulfilling the following criteria:

- Chemical distributors and traders generally taking **title** to chemical substances or preparations and/or causing products to be placed upon the market. Some distributors also act as agents on occasions earning a commission on sales delivered directly by the producer.

Abstract

- Companies demonstrating that the representation or supply of products from **3rd party chemical producers** is a core business activity. Where companies are also manufacturers of products or have divisions involved with unrelated business activities, only their distribution activities are included.
- Companies that **solely produce and distribute their own** chemical products (e.g. manufacturers) are excluded.
- Companies involved with polymer and food ingredient distribution are included, but companies offering **solely non chemical ingredients**, such as dried fruits, seeds etc. are excluded.

About Chemagility

Chemagility are publishers of the World Chemical Distributor Directory - an online database of 6000 chemical and raw material distributors from over 120 countries. Besides information on the chemical distribution industry the company also provides a range of services ranging from consultancy, marketing reports and communications to web site development, search marketing and online promotion.

Website: www.chemagility.com

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Published: March 1, 2008

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