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Global Chemical Distribution Market: Analysis By Product Type (Commodity Chemicals and Speciality Chemicals), By End User (Construction, Automotive and Transport, Industrial Manufacturing, Pharmaceuticals, Agriculture, Consumer Goods, Textiles and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

The global chemical distribution market was valued at US$266.67 billion in 2021. The market value is projected to grow to US$374.52 billion by 2027. Chemical distribution refers to packaging, storage and transportation of bulk and packaged chemicals. The process involves distribution of chemical substances and provision of customized solutions by chemical distributors to different sectors including pharmaceuticals, construction, agriculture, consumer goods and automotive. The chemical distribution market is associated with supply of chemicals and provision of chemical distribution services by entities including organizations, sole traders, and partnerships between companies.

The factors such as integration of artificial intelligence (AI) into chemical distribution, outsourcing, consolidation, increasing investment in research and development, etc. are expected to drive the overall market growth in the forecasted period. The market is anticipated to grow at a CAGR of approx. 6% during the forecasted period of 2022-2027.

Market Segmentation Analysis:

By Product Type: The report provides the bifurcation of the market into two segments

based on the product type: commodity chemicals and speciality chemicals. In 2021, the commodity chemicals segment held the major share of the global chemical distribution market as these chemicals are usually produced and consumed in large quantities across various industries such as food & beverages, pharmaceuticals, agriculture, electronics and industrial manufacturing. Speciality chemicals distribution market is the fastest growing segment of global chemical distribution market owing to rising demand for application-specific compounds in various industries, higher pricing power with chemical distributors with products being tailor-made and technological advancements in terms of production.

By End User: The report provides the bifurcation of the market into eight segments based on the end user: construction, automotive and transport, pharmaceuticals, industrial manufacturing, agriculture, consumer goods, textiles and others. Construction chemical distribution market is the largest segment of global chemical distribution market owing to rapid growth of building and construction industry in developed countries and rapid industrialization and urbanization in developing countries, boosting the demand for chemicals like concrete admixtures, polymer bonding agents, epoxy grouts and adhesives, supplied by chemical distributors.

By Region: The report provides insight into the chemical distribution market based on the regions namely North America, Europe, Asia Pacific, Middle East & Africa, and Latin America. Asia Pacific held the largest share in the market. Asia Pacific is less consolidated, given its exposure to developing countries. Within Asia Pacific, China is the largest and fastest growing market owing to large consumer base in terms of population, rapid growth of end user industries and rising investment in construction sector.

It can be observed that the North America is the most consolidated. The high North American consolidation is driven by the fact that a distributor needs to have nationwide coverage to be successful. Within North America, the US chemical distribution market is both the largest and fastest growing chemical distribution market, owing to rising consumption of chemicals across numerous industries, sustained construction activities, strong consumer purchasing power and growing utilization of bulk and speciality chemicals through oil, gas and petroleum industries. The US chemical distribution market is futthur divided into two segments based on the product type: commodity chemicals and speciality chemicals. The US commodity chemical distribution market held the largest share of US chemical distribution market.

Market Dynamics:

Growth Drivers: The global chemical distribution market has been growing over the past few years, due to factors such as the growth of chemical industry, rising demand from other end user industries, rising demnad for value-added services, digitalization, etc. Chemical distribution services serve as an important link for the chemical producers to reach to the smaller customers that are situated in less developed regions, incentivizing chemical manufacturing firms to demand these services to reduce supply chain complexities and tap into new opportunities. Therefore, growth in chemical industry will lead to the rise in demand for chemical distribution services by chemical industry, boosting the growth of global chemical distribution market.

Challenges: However, the market growth would be negatively impacted by various challenges such as growing enviormental and security concerns, rising complexities in chemical logistics, etc. Since chemical production is associated with climate change, groundwater and soil contamination, degradation of natural resources, waste management issues, noise pollution, air pollution and depletion of non-renewable resources like fossil fuels, oil, natural gas and coal that are used as raw material in chemical manufacturing, Therefore, rising environmental safety concerns among people have contributed to lower demand for various chemical and hence, negative effect on the demand for chemical distribution services, impeding the growth of chemical distribution market.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as integration of artificial intelligence (AI) into chemical distribution, outsourcing, increasing investment in research and development, consolidation, etc. With high complexity attached in reaching the end users, there has been rise in chemical companies, outsourcing the purchase of chemicals to chemical distributors as they often provide improved delivery timings and delivery reliability for chemical product ranges. Therefore, with rising dependence of chemical manufacturers on chemical distributors for safe delivery of loose and non bulk chemical material along with handling custom amalgamation and repackaging will continue to boost the demand for chemical distribution services and hence the growth of global chemical distribution market

Impact Analysis of COVID-19 and Way Forward:

COVID-19 brought in many changes in the world in terms of reduced productivity, loss of life, business closures, closing down of factories and organizations, and shift to an online mode of work. So, with COVID-19 forcing chemical and end user industries to cut

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down on their production, there was a sudden fall in both demand and supply of these chemical compounds, resulting in lower demand for chemical distribution services by chemical manufactures for distribution of these chemicals to end user industries. Therefore, the global impact of COVID-19 on chemical distribution market turned out to be negative across all regions.

Competitive Landscape:

The market for chemical distribution has been fragmented, with top ten players representing only 16.63% of the total market share. The key players of the chemical distribution market are:

- IMCD N.V. (IMCD Group)
- Brenntag S.E.
- Univar Solutions Inc. (UNVR)
- Sojitz Corporation (solvadis deutschland gmbh)
- Azelis Group NV
- ICC Industries Inc. (ICC Chemical Corporation)
- Tricon Energy Inc.
- Omya AG
- Biesterfeld AG
- HELM AG
- Petrochem Middle East FZE
- Sinochem Corporation (Sinochem Plastics Co., Ltd.)
- Manuchar N.V

Despite the fragmented competitive landscape, the sector has undergone quite a bit of Consolidation. Scale is the key competitive advantage for players in chemical distribution market, so, companies are adopting partnerships, acquisitions & mergers as key strategy to strengthen their consumer reach and reinforce their supply chain as large players are better able to capture rising penetration rates and maximize the benefits for their chemical suppliers. For instance, since 2010, Brenntag has completed around 89 acquisitions with most recent acquisition of “the Life Science and Coatings business from Ravenswood”, a specialties distributor in Australia and New Zealand, on November 02, 2022.

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