

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 further 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 demand 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 environmental 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

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.

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Chemical Distribution: An Overview

2.1.1 Definition of Chemical Distribution

2.1.2 Factors of Chemical Distribution

2.1.3 Value Proposition of Chemical Distribution

2.2 Chemical Distribution Segmentation: An Overview

3. GLOBAL MARKET ANALYSIS

3.1 Global Chemical Distribution Market: An Analysis

3.1.1 Global Chemical Distribution Market: An Overview

3.1.2 Global Chemical Distribution Market by Value

3.1.3 Global Chemical Distribution Market by Product Type (Commodity Chemicals and Speciality Chemicals)

3.1.4 Global Chemical Distribution Market by End User (Construction, Automotive and Transport, Industrial Manufacturing, Pharmaceuticals, Agriculture, Consumer Goods, Textiles and Others)

3.1.5 Global Chemical Distribution Market by Region (Asia Pacific, North America, Europe, Middle East and Africa and Latin America)

3.2 Global Chemical Distribution Market: Product Type Analysis

3.2.1 Global Chemical Distribution Market by Product Type: An Overview

3.2.2 Global Commodity Chemicals Distribution Market by Value

3.2.3 Global Speciality Chemicals Distribution Market by Value

3.3 Global Chemical Distribution Market: End User Analysis

3.3.1 Global Chemical Distribution Market by End User: An Overview

3.3.2 Global Construction Chemical Distribution Market by Value

3.3.3 Global Automotive and Transport Chemical Distribution Market by Value

3.3.4 Global Industrial Manufacturing Chemical Distribution Market by Value

3.3.5 Global Pharmaceutical Chemical Distribution Market by Value

3.3.6 Global Agriculture Chemical Distribution Market by Value

3.3.7 Global Consumer Goods Chemical Distribution Market by Value

3.3.8 Global Textiles Chemical Distribution Market by Value

3.3.9 Global Other Chemical Distribution Market by Value

4. REGIONAL MARKET ANALYSIS

4.1 Asia Pacific Chemical Distribution Market: An Analysis

4.1.1 Asia Pacific Chemical Distribution Market: An Overview

4.1.2 Asia Pacific Chemical Distribution Market by Value

4.1.3 Asia Pacific Chemical Distribution Market by Region (China, Japan, South Korea, India and Rest of Asia Pacific)

4.1.4 China Chemical Distribution Market by Value

4.1.5 Japan Chemical Distribution Market by Value

4.1.6 South Korea Chemical Distribution Market by Value

4.1.7 India Chemical Distribution Market by Value

4.1.8 Rest of Asia Pacific Chemical Distribution Market by Value

4.2 North America Chemical Distribution Market: An Analysis

4.2.1 North America Chemical Distribution Market: An Overview

4.2.2 North America Chemical Distribution Market by Value

4.2.3 North America Chemical Distribution Market by Region (The US, Canada and Mexico)

4.2.4 The US Chemical Distribution Market by Value

4.2.5 The US Chemical Distribution Market by Product Type (Commodity Chemicals and Speciality Chemicals)

4.2.6 The US Commodity Chemical Distribution Market by Value

4.2.7 The US Speciality Chemicals Distribution Market by Value

4.2.8 Canada Chemical Distribution Market by Value

4.2.9 Mexico Chemical Distribution Market by Value

4.3 Europe Chemical Distribution Market: An Analysis

4.3.1 Europe Chemical Distribution Market: An Overview

4.3.2 Europe Chemical Distribution Market by Value

4.3.3 Europe Chemical Distribution Market by Region (Germany, France, Italy, UK and Rest of Europe)

4.3.4 Germany Chemical Distribution Market by Value

4.3.5 France Chemical Distribution Market by Value

4.3.6 Italy Chemical Distribution Market by Value

4.3.7 UK Chemical Distribution Market by Value

4.3.8 Rest of Europe Chemical Distribution Market by Value

4.4 Middle East and Africa Chemical Distribution Market: An Analysis

4.4.1 Middle East and Africa Chemical Distribution Market: An Overview

4.4.2 Middle East and Africa Chemical Distribution Market by Value

4.5 Latin America Chemical Distribution Market: An Analysis

4.5.1 Latin America Chemical Distribution Market: An Overview

4.5.2 Latin America Chemical Distribution Market by Value

5. IMPACT OF COVID-19

5.1 Impact of COVID-19 on Chemical Distribution Market

5.1.1 Declining Chemical Industry Sales

5.2 Post COVID-19 Impact on Chemical Distribution Market

6. MARKET DYNAMICS

6.1 Growth Driver

6.1.1 Growth of Chemical Industry

6.1.2 Rising demand from Other End User Industries

6.1.3 Rising demand for value-added services

6.1.4 Digitalization

6.1.5 Globalization

6.2 Challenges

6.2.1 Growing Environmental and Safety concerns

6.2.2 Rising Complexities in Chemical Logistics

6.3 Market Trends

6.3.1 Integration of Artificial Intelligence (AI) into Chemical distribution

6.3.2 Integration of Internet of things (IoT) solutions

6.3.3 Outsourcing

6.3.4 Increasing Investment in Research and Development (R&D)

6.3.5 Consolidation

7. COMPETITIVE LANDSCAPE

7.1 Global Chemical Distribution Players by Market Share

7.2 Global Chemical Distribution Market Players by Product and Service Comparison

8. COMPANY PROFILES

8.1 IMCD N.V. (IMCD Group)

8.1.1 Business Overview

8.1.2 Operating Segments

8.1.3 Business Strategy

8.2 Brenntag S.E.

8.2.1 Business Overview

- 8.2.2 Operating Segments
- 8.2.3 Business Strategy
- 8.3 Univar Solutions Inc. (UNVR)
 - 8.3.1 Business Overview
 - 8.3.2 Operating Segment
 - 8.3.3 Business Strategy
- 8.4 Sojitz Corporation (Solvadis Deutschland GmbH)
 - 8.4.1 Business Overview
 - 8.4.2 Operating Segment
 - 8.4.3 Business Strategy
- 8.5 Azelis Group NV
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segment
 - 8.5.3 Business Strategy
- 8.6 Tricon Energy Inc.
 - 8.6.1 Business Overview
 - 8.6.2 Business Strategy
- 8.7 Omya AG
 - 8.7.1 Business Overview
 - 8.7.2 Business Strategy
- 8.8 Biesterfeld AG
 - 8.8.1 Business Overview
 - 8.8.2 Business Strategy
- 8.9 HELM AG
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 Petrochem Middle East FZE
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy
- 8.11 Manuchar N.V.
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 Sinochem Corporation (Sinochem Plastics Co., Ltd.)
 - 8.12.1 Business Overview
- 8.13 ICC Industries Inc. (ICC Chemical Corporation)
 - 8.13.1 Business Overview

List Of Figures

LIST OF FIGURES

Figure 1: Factors of Chemical Distribution

Figure 2: Value Proposition of Chemical Distribution

Figure 3: Global Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 4: Global Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 5: Global Chemical Distribution Market by Product Type; 2021 (Percentage, %)

Figure 6: Global Chemical Distribution Market by End User; 2021 (Percentage, %)

Figure 7: Global Chemical Distribution Market by Region; 2021 (Percentage, %)

Figure 8: Global Commodity Chemicals Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 9: Global Commodity Chemicals Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 10: Global Speciality Chemicals Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 11: Global Speciality Chemicals Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 12: Global Construction Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 13: Global Construction Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 14: Global Automotive and Transport Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 15: Global Automotive and Transport Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 16: Global Industrial Manufacturing Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 17: Global Industrial Manufacturing Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 18: Global Pharmaceutical Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 19: Global Pharmaceutical Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 20: Global Agriculture Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 21: Global Agriculture Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 22: Global Consumer Goods Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 23: Global Consumer Goods Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 24: Global Textiles Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 25: Global Textiles Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 26: Global Other Chemical Distribution Market by Value; 2017-2021 (US\$ Billion)

Figure 27: Global Other Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 28: Asia Pacific Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 29: Asia Pacific Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 30: Asia Pacific Chemical Distribution Market by Region; 2021 (Percentage, %)

Figure 31: China Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 32: China Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 33: Japan Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 34: Japan Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 35: South Korea Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 36: South Korea Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 37: India Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 38: India Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 39: Rest of Asia Pacific Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 40: Rest of Asia Pacific Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 41: North America Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 42: North America Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 43: North America Chemical Distribution Market by Region; 2021 (Percentage, %)

Figure 44: The US Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 45: The US Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 46: The US Chemical Distribution Market by Product Type; 2021 (Percentage, %)

Figure 47: The US Commodity Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 48: The US Commodity Chemicals Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 49: The US Speciality Chemicals Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 50: The US Speciality Commodity Chemicals Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 51: Canada Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 52: Canada Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 53: Mexico Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 54: Mexico Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 55: Europe Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 56: Europe Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 57: Europe Chemical Distribution Market by Region; 2021 (Percentage, %)

Figure 58: Germany Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 59: Germany Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 60: France Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 61: France Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 62: Italy Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 63: Italy Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 64: UK Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 65: UK Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 66: Rest of Europe Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 67: Rest of Europe Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 68: Middle East and Africa Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 69: Middle East and Africa Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 70: Latin America Chemical Distribution Market by value; 2017-2021 (US\$ Billion)

Figure 71: Latin America Chemical Distribution Market by Value; 2022-2027 (US\$ Billion)

Figure 72: Global Chemical Industry Revenue; 2017-2021 (US\$ Billion)

Figure 73: Global chemical sales CAGR by Region; 2014-2030 (Percentage, %)

Figure 74: Global Pharmaceutical Industry Revenue; 2017-2021 (US\$ Billion)

Figure 75: Global Construction Market Size; 2020-2027 (US\$ Trillion)

Figure 76: Global Artificial Intelligence Market Size; 2021–2025 (US\$ Billion)

Figure 77: Global number of IoT Connections; 2020–2027 (Billion)

Figure 78: Global Chemical Distribution Players by Market Share; 2021 (Percentage, %)

Figure 79: IMCD N.V. Revenue by Segments; 2021 (Percentage, %)

Figure 80: Brenntag S.E. External Sales by Segments; 2021 (Percentage, %)

Figure 81: Univar Solutions Inc. Net Sales by reportable segments; 2021 (Percentage, %)

Figure 82: Sojitz Corporation Revenue by Segments; 2022 (Percentage, %)

Figure 83: Azelis Group NV Revenue by segments; 2021 (Percentage, %)

Table 1: Chemical Distribution Segmentation by Product Type

Table 2: Global Chemical Distribution Market Players by Product and Service Comparison

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