

**SPECIAL
ISSUE**

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CHEMICAL DISTRIBUTORS

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Jarwaarde deals with a
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13-19 June 2025

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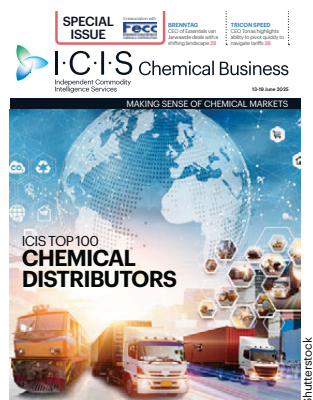


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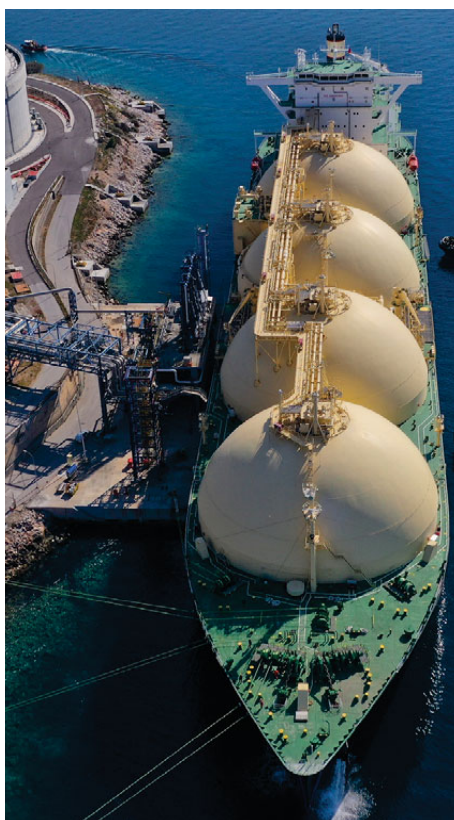
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Cover story

We present the 2025 ICIS Top 100 Chemical Distributors, based on 2024 sales revenues. For full story see [Special Report](#)



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SPECIAL REPORTS

23 ICIS Top 100 Chemical Distributors

We reveal the leaders of this important link in the chemicals supply chain



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Dynamic distributors

We present and celebrate the ICIS Top 100 Chemical Distributors and their valuable contributions to chemical supply chains in an increasingly volatile world

We are pleased to announce the 16th annual ICIS Top 100 Chemical Distributors, the most comprehensive global ranking of these essential companies in the chemical supply chain.

Leading the distinguished and dynamic group once again is Germany-based Brenntag with \$16.8 billion in 2024 sales, followed by US-based Tricon Energy at \$13.1 billion, US-based Univar Solutions at \$11.5 billion, Japan-based Nagase & Co at \$5.7 billion and Netherlands-based IMCD at \$5.0 billion.

The ICIS Top 100 Chemical Distributors is the brand, but we include detailed information on more than 300 companies, as well as rank leaders by sales in key geographies. We compile the ICIS Top 100 Chemical Distributors with the support of the European Association of Chemical Distributors (Fecc), the US-based Alliance for Chemical Distribution (ACD), Associquim (Brazilian Association of Chemical and Petrochemical Distributors), Responsible Distribution Canada (RDC), UK-based Chemical Business Association (CBA), and Netherlands-based International Chemical Trade Association (ICTA).

Distributors can leverage their diverse supplier relationships to help ensure security of supply for customers as well as optimize costs in the face of tariffs and other protectionist measures

Tariff uncertainty and resulting macroeconomic volatility has been the key theme this year, creating an environment where chemical distributors can demonstrate their value to both suppliers and customers.

Distributors can leverage their diverse supplier relationships to help ensure security of supply for customers as well as optimize costs in the face of tariffs and other protectionist measures.

They also can help suppliers find more outlets for their products in the face of tariffs and other trade barriers.

Whenever supply disruptions emerge, from weather



events to geopolitical turmoil blocking key supply routes, to plant closures, to trade barriers such as tariffs, chemical distributors serve as a valuable link between suppliers and customers.

This is in addition to value-added services such as new formulations to enhance performance or reduce carbon emissions.

Mergers and acquisitions

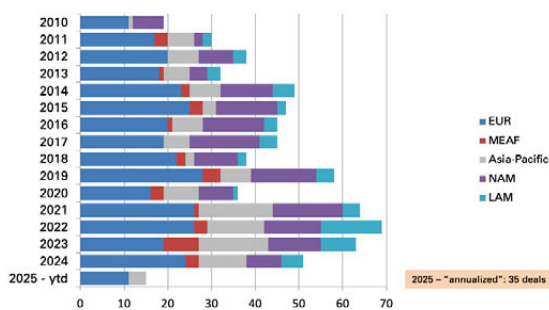
Meanwhile, mergers and acquisitions (M&A) continue, but at a much more measured pace in today's uncertain macroeconomic environment and low demand environment as players seek to add new capabilities and geographic coverage. Year-to-date through June 2025, chemical distribution M&A activity is down substantially – on track for around 35 deals versus over 50 transactions in 2024, according to an analysis by DistriConsult.

“Valuations are difficult to agree on, in view of all the uncertainties that US President Trump is triggering [with tariffs], among other geopolitical issues and the rather negative outlook for chemicals,” said Guenther Eberhard, senior and managing partner at DistriConsult.

However, deal activity could start to pick up later in the year and into 2026 as companies start refocusing on strategy and growth, after years of having to more narrowly focus on keeping supply chains moving amid COVID, weather and geopolitical disruptions, he added.

Chemical distributor CEOs and senior executives highlighted their agility and ability to pivot in the face of US tariffs and retaliatory moves. But they have not lost sight of key trends in innovation and sustainability which will drive future growth. We thank all the chemical distributors and industry associations for their participation and support in this unique project. ■

M&A activity by continent
(number of transactions – June 2025 YTD)



Source: Company websites, press releases and filings, ChemAbility, Hazardous Cargo Bulletin, DistriConsult analysis



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News briefs

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EUROPE

Kemira to expand SBH powder production

Kemira has made an investment decision to expand the sodium borohydride (SBH) powder production capacity at its Aetsa site in Finland. The investment – valued at under €10 million – includes a new production line and some additional process safety improvements for the plant, the company said. The expansion is in the engineering phase and the new production line will be fully operational during Q4 2026.

DerGruenePunkt to supply PS waste to Agilyx

DerGruenePunkt (GreenDot) has signed a Memorandum of Understanding (MoU) to supply waste polystyrene (PS) for pyrolysis-based chemical recycler Agilyx's Styrenyx plants. GreenDot is expecting to initially provide up to 20,000 tonnes/year of customized plastic waste to Agilyx with Agilyx's output targeting the European Economic Area (EEA). The aim is to prioritize brand owner customers of its Extended Producer Responsibility (EPR) business to help them achieving regulatory recycled content targets, GreenDot said.

Plug Power, AGA to deliver 2GW project

US-based hydrogen solutions company Plug Power said that in partnership with Australia's Allied Green Ammonia (AGA), it will deliver a 2 gigawatt (GW) electrolyzer project tied to a sustainable fuels project in Uzbekistan. Plug's electrolyzer technology has been selected as the foundation of a new \$5.5 billion green chemical production facility in the central Asian country that will produce sustainable aviation fuel (SAF), green urea and green diesel.

Germany's April output falls 1.9% from March

Germany's manufacturing output fell 1.9% month on month in April, with chemicals-pharmaceuticals production also declining. The index for chemical-pharmaceutical output dropped to 85.4 points

in April, from 92.4 in March, led by a 17.7% decline in pharmaceuticals production, according to the country's central bank and its federal statistics office. In energy-intensive industries, which include chemicals, production fell 2.1% month on month and was down 2.7% year on year from April 2024.

ASIA

China May CPI stable, PPI deflation deepens

China's retail inflation stabilized in May while wholesale deflation deepened, official data showed. In May, the country's consumer price index (CPI) dropped 0.1% year on year, flat with the previous two months, and the producer price index (PPI) decreased by a sharper -3.3% from -2.7% in April. NBS cited a slump in energy prices, which fell by 6.1% on year in May, as a major driver of CPI deflation.

China futures rise as talks with the US end positively

China's petrochemicals futures inched up early on 11 June on upbeat signals from the two-day trade talks between Beijing and Washington, in London. High-level trade talks between the world's largest two economies concluded on Tuesday, and the two sides have reached a framework agreement to implement Geneva consensus, which include a 90-day pause on reciprocal tariffs and a rollback of certain other measures.

China Apr EPDM imports up month on month

China imported nearly 17,000 tonnes of ethylene propylene diene-monomer (EPDM) in April, 8.7% more than March, data from the ICIS Supply and Demand Database shows. April import volumes were also sharply higher year on year. There was a strong 9.8% growth in China's car sales for April, based on data from the China Association of Automobile Manufacturers (CAAM).

Japan revised Q1 GDP contraction narrowed

Japan's economy contracted by 0.2% on an annualized basis in

Q1, revised from the initial estimate of a 0.7% contraction on higher-than-expected consumer spending. The country's real GDP in price adjusted terms was flat from the previous quarter, improving from the earlier reading of a 0.2% contraction, the Cabinet Office said. Private consumption, which accounts for more than half of Japan's GDP, grew by 0.1% in January-March.

PVC shipments to India hit as vessel catches fire

A Singapore-flagged cargo vessel headed for Nhava Sheva port in western India has caught fire off the coast of Kerala, with market sources confirming that the incident is likely to impact import volumes of polyvinyl chloride (PVC). The vessel, heard carrying over 600 containers, experienced multiple explosions on board, threatening to sink, as per reports. A major northeast Asian PVC supplier is believed to have shipped multiple containers on the vessel.

AMERICAS

Above-average 2025 hurricane season

Researchers at Colorado State University's Weather and Climate Research department maintained their prediction of an above-average Atlantic hurricane season, with a probability that 33% of major storms could make landfall in the US Gulf. The CSU team predicts 17 named storms during the Atlantic hurricane season, which began on 1 June and runs through 30 November. Of those 17 storms, researchers forecast nine to become hurricanes and four to reach major hurricane strength of Category 3 or higher.

Ethane deal could unlock \$766 million

Braskem's potential deal with Petrobras for the supply of ethane to its Duque de Caxias, Rio de Janeiro facilities could unlock investments of Brazilian real (R) 4.3 billion (\$766 million). Braskem, said in a statement the deal with the state-owned energy major Petrobras is "currently

under negotiation" without more details. Braskem said that, for the moment, it is carrying out a R233 million expansion in ethylene and polyethylene (PE) capacities but the rest of the investments up to R4.3 billion still require several studies, approvals and the key to it all, the deal with Petrobras.

NOVA appeals C\$1.6 billion damages

NOVA Chemicals is disappointed with the latest court ruling in the long-running dispute over its joint venture (JV) ethylene plant with Dow in Joffre in Canada's Alberta province and has filed an appeal. ICIS had asked NOVA for comment on Dow's statement that a Canadian court ordered NOVA to pay an additional Canadian dollars (C\$) 1.6 billion (US\$1.2 billion) in damages. "We are disappointed with the court's quantification of its previously issued decision", NOVA said.

Pemex turnaround key to unlock \$50 billion

Mexico's chemicals sector is ready to potentially invest \$50 billion in the next decade if key challenges are addressed, including performance at state-owned energy major Pemex, according to the president of trade group ANIQ. Jose Carlos Pons, who is also the CFO of Mexican chemicals producer Alpek, said ANIQ is in contact with the government about potential projects, some of them related Pemex assets in petrochemicals which are idled or running at low capacities.

MIDDLE EAST/AFRICA

ADNOC Logistics, Borouge to boost exports

ADNOC Logistics & Services (ADNOC L&S) has entered into a \$531 million strategic partnership with polyolefins major Borouge to boost UAE's production and export of petrochemicals. As part of the partnership, Borouge has awarded ADNOC L&S a 15-year contract to manage logistics on up to 70% of its annual production, "which will increase significantly following the completion of the Borouge 4 plant expansion".

CEO interview **Al Greenwood** and **Joseph Chang** Colorado Springs

NOVA sees merger synergies

CEO Roger Kearns eyes opportunities in merger with Borealis and Borouge, seeks more diversified exports

NOVA Chemicals, Borealis and Borouge have started integration planning for their pending merger, with the three eyeing commercial and procurement synergies as part of a larger strategy to make the combined business a global company, the CEO of NOVA said.

The three companies cannot execute plans until the merger closes, which is expected in Q1 2026, NOVA CEO Roger Kearns said in an interview with ICIS on the sidelines of the annual meeting of the American Chemistry Council (ACC). However, the three can start making plans and identifying strengths of the merged companies.

Combining the three companies would create an extremely broad commercial network, with NOVA's selling from its Canada base, Borouge selling from its UAE base and Borealis from its Europe/US base.

That enlarged sales channel will help NOVA hedge against any resurgence in trade tensions with the US. For now, NOVA can sell product to the US as long as the material is compliant with the US-Mexico-Canada Agreement (USMCA). Since NOVA relies on ethane produced in North America, USMCA compliance should be straightforward.

In addition to commercial synergies, Kearns mentioned procurement. The companies would also explore where to expand in the future and what technology would be used by any new plants.

Geismar cracker a core asset

The companies cannot execute on any expansion plans while the merger is still pending. But among the possibilities for any future projects is NOVA's cracker in Geismar, Louisiana in the US, which Kearns calls core. The plant is not integrated and has land that could accommodate a new polyethylene (PE) plant.



Expansion at NOVA's Geismar, Louisiana site is still an option

Borealis owns the Borstar process technology, which could be used for any potential new PE plant. The site also has land, and NOVA once considered building a PE plant on the site that would use its Advanced Sclairtech Technology (AST). Such a plant would join similar ones at NOVA's hubs in Alberta and Ontario provinces in Canada.

For now, Geismar is core for



Roger Kearns
CEO, NOVA Chemicals

"We will export more [beyond North America] than in the past with this new asset. AST production on both the West and East Coasts opens up opportunities"

NOVA, and it provides the company with a good merchant ethylene option and a good expansion option once the opportunity presents itself for a new project, CEO Roger Kearns said. He made his comments in an interview with ICIS on the sidelines of the annual meeting of the American Chemistry Council (ACC).

The company completed the purchase of Williams' stake in the cracker in 2017 for \$2.1 billion. The cracker is far from NOVA's production hubs in Canada, but it enjoys access to low-cost ethane feedstock.

Dealing with tariffs

Meanwhile, Canada-based NOVA Chemicals proactively sent more PE volumes to the US well ahead of tariffs and is seeking to increase exports to Europe and the rest of the world with its new AST2 PE line, its CEO said.

"We did a lot of work and created a cross-functional team just focused on [tariffs]. In December 2024 we took actions proactively to place a significant amount of material in the US to take care of customers," said Kearns.

"It was important for us to tell customers: 'We're here for you,

to help you get through this,'" he added.

The US Trump administration in February 2025 put 25% tariffs on Mexico and Canada, and 10% tariffs on China. On 2 April, when the US announced a wide range of reciprocal tariffs, it exempted goods compliant with the US-Mexico-Canada Agreement (USMCA).

"We are very happy with this. There will have to be [additional] negotiations between the US and Canada but today we are back to a neutral or even an advantaged position," said Kearns.

"We are in a position to be super agile and react quickly," he added.

Diversifying exports

With the start-up of its 450,000 tonne/year Advanced SCLAIRTECH 2 (AST2) PE plant in Rokeby, St Clair Township in Ontario, on Canada's east coast in 2024, NOVA will look to export more material outside North America, he pointed out.

The majority of NOVA's PE exports from Canada go to the US.

"We will export more [beyond North America] than in the past with this new asset. AST production on both the West and East Coasts opens up opportunities," said Kearns.

NOVA's first AST PE plant is in Joffre, Alberta, Canada, near the west coast.

NOVA currently exports PE out of North America at around half the level of US PE industry exports, making exports about one-quarter of the company's production. However, this will trend somewhat higher with AST2, he noted.

Like NOVA's first AST plant in Joffre, Alberta, Canada, AST2 can use different catalysts, giving it the flexibility to produce multiple grades of PE, from plastomers to octene products to homopolymers.

"It's differentiated so we still want to bring it where it's most valued – for example, Europe," said Kearns. ■



China benzene futures

Launch marks a crucial step in the financialization of China aromatics, expanding risk management options and strengthening upstream-downstream connectivity

Jenny Yi and Yoyo Liu Singapore

On 14 May, the Dalian Commodity Exchange (DCE) issued a notice to solicit public opinions on proposed futures and options contracts for benzene along with the relevant rules. The deadline for feedback was 21 May 2025, marking the countdown to the launch of benzene futures and options in China.

ICIS expects that the tight supply-demand balance in China's benzene market will continue to improve in 2025, exerting downward pressure on the market. The launch of a benzene futures platform is likely to diversify trading, boost activity, and complicate price drivers while enhancing benzene-styrene price linkage efficiency.

In recent years, with the deepening integration of financial markets and the real economy, financial derivatives such as futures, options and swaps have gradually become important tools for petrochemical companies.

These tools can help to manage price risks and optimize the coordinated operation of industry chains.

In the aromatics industry chain, benzene, as a core basic feedstock, sees its price fluctuations directly affect the cost structure and margins of multiple downstream chemical products, including styrene monomer (SM), polystyrene (PS), acrylonitrile butadiene styrene (ABS), phenol, aniline and caprolactam (capro).

The previous lack of a unified price discovery mechanism resulted in lagging and uncertain price transmission between benzene and SM.

The official launch of benzene futures in 2025 marks a crucial step forward in the financialization of China's aromatics industry chain.

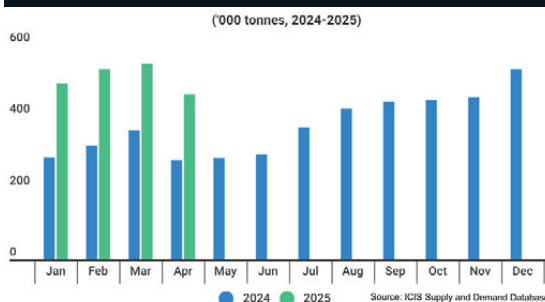
According to the draft for opinions, the benzene futures contract will use BZ as its ticker symbol, with a trading unit of 30 tonnes/lot. The minimum tick size is set at yuan (CNY) 1/tonne, while the daily price limit range will be 4% of the last settlement price. The minimum trading margin is 5% of the contract value.

The launch of benzene futures will not only diversify risk management tools but also significantly enhance the interconnectivity between upstream and downstream sectors of the industry chain.

Against the backdrop of SM futures already being launched, trading activities in the benzene market keep rising. However, the previous lack of a unified price discovery mechanism resulted in lagging and uncertain price transmission between benzene and SM. With the launch of benzene futures, this situation is expected to improve significantly.

ICIS data showed that, with the support of futures tools, the cost transmission efficiency between ben-

China's benzene monthly import volume



zene and SM has significantly improved. In 2023 and 2024, the correlation coefficients between China's benzene and SM spot prices remained at high levels of 0.91 and 0.85 respectively, demonstrating their strong price linkage.

Entering 2025, against the backdrop of intensified macroeconomic fluctuations and increased supply pressures, their correlation further strengthened. In January-May 2025, the price correlation coefficient between benzene and styrene rose to 0.95, indicating nearly synchronous price movements.

Market players expect that benzene futures will serve as a "binding agent" in the future. On one hand, they will provide more transparent and forward-looking price signals, and on the other they will deepen and strengthen cross-product arbitrage and hedging activities between benzene and SM based on existing modes.

Furthermore, the spot trading modes are expected to undergo a new round of upgrades. Apart from the existing price differential-based pricing mechanism between benzene and ethylbenzene (EB), more market-oriented mechanisms such as basis trading and delivery linked to futures prices are likely to be introduced in the future.

Overall, the launch of benzene futures will further improve the financial ecosystem of the aromatics industry chain, injecting new momentum into the coordinated development of upstream and downstream sectors.

Supply to improve tight balance

Spot benzene prices fluctuated by 39.9% during January-May 2025 while styrene monomer fluctuated by 23.5%.

Several new crackers and some chemical and refining integrated upgrading projects in China are gradually put into operation in 2025, leading to a simultaneous increase in the capacity of benzene as a by-product.

China's effective incremental benzene capacities are expected to reach 1.44 million tonnes in 2025, reaping a growth rate of around 4.9%, according to ICIS Supply and Demand Database. On the other hand, toluene disproportionation (TDP) units in Asia have been maintain-



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ing high operating rates on sound margins amid weakening demand for gasoline blending in the US since 2024, which has been boosting benzene supply.

Additionally, benzene capacity loss caused by planned turnarounds in Asia in 2025 is estimated to drop by around 20% year on year. Although the second quarter remains a heavy maintenance season, intensive production recovery in the third quarter will bring a significant increase in benzene supply.

Changing global trade flows have further intensified the supply pressure in China. Shrinking downstream demand in Europe since the fourth quarter of 2024 has led to an increase in benzene outflows. Meanwhile, volumes from South Korea were mostly diverted from the US to China due to the long-closed US-Asia arbitrage window and reciprocal tariffs. This has made China the primary target market for surplus global benzene supply.

Benzene downstream industries remain in expansion cycle in 2025, but the rate of capacity expansion has significantly slowed compared to previous years

China's monthly benzene imports have been staying above 400,000 tonnes since August 2024 and the import volume in January-April 2025 totalled 2.03 million tonnes, up by 64% year on year, according to ICIS Supply and Demand Database.

Benzene downstream industries remain in their expansion cycle in 2025, but the rate of capacity expansion has significantly slowed compared to previous years. Increasing recession risks and ongoing geopolitical conflicts have hampered the progression of projects.

Some are even likely to be delayed from commissioning. The remaining incremental downstream capacities, such as aniline and capro have mostly been delayed or planned to start up in the second half of the year.

Regarding end-user demand, Chinese end-use industries with a large proportion of exports, such as textiles, home appliances, and automobiles, are facing severe challenges due to the US tariff barrier. Notably, with China and the US announcing on 12 May that they will slash tariffs for 90 days, market sentiment has improved significantly, fuelling demand.

However, despite this positive development, market participants remain concerned about the potential negative impact of the uncertainties surrounding the tariff policies after the 90-day pause.

China's end-use industries are becoming more reliant on domestic demand. The Chinese government continues to strengthen its policy support, including expanding the scope of the trade-in program and improving monetary policy tools.

China's total retail sales of consumer goods increased by 4.7% year on year in January-April 2025 to CNY16 trillion, according to the latest data from the National Bureau of Statistics (NBS).

However some end-use industries, such as automobiles and home appliances may face the risk of overdrawn demand due to the trade-in program.

China's benzene demand growth is expected to slow down to around 6% in 2025, and the tight supply-demand balance is expected to improve significantly. ■

Think Tank

Jonathan Yee Singapore

Asia, Mideast petrochemical markets brace for tough summer

Tariff concerns and ample supply continue to exert pressure on petrochemical markets in both Asia and the Middle East, with regional demand staying weak, with consumption in India unlikely to pick up until September.

In the aromatics market, supply is expected to be tight as increased tariff uncertainties continue to disrupt traditional trade flows.

Mixed xylene (MX) and downstream paraxylene (PX) were in steep backwardation, where in spot prices are higher than futures prices, amid freight constraints and high US demand. Benzene, which closely tracks falling crude prices, continued to underperform its aromatics peers.

Benzene from South Korea has not been flowing into the US and was mostly going into China, market sources said. South Korea is a major exporter of aromatics products.

Asia's aromatics tightness is likely to persist through June-August, as market participants adapt to tariff policies and freight cost pressures from front-loading following a trade war truce between the US and China.

For shipping, market players are expecting freight rates to start to drop again in July-August.

Prices for plastics in India are under pressure from the monsoon season, as well as more supply coming from China, market sources said.

During India's monsoon period, manufacturing activity tends to moderate, especially the packaging sector as well as the food and beverage sector, weakening end-product demand.

Concurrently, domestic supply is ample, pushing down prices for Indian polyethylene (PE), polypropylene (PP), high-density polyethylene (HDPE) and low-density polyethylene (LDPE).

But post-monsoon season from September, demand is likely to pick up. The festive season, including Diwali, is likely to increase demand for end-products such as plastics. Demand for chemicals such as PE, PP and PVC and synthetic rubbers is expected to improve after September.

Syria is opening up following regime change and lifting of sanctions by the US and EU


India's strong domestic consumption would shield it from the US-China tariff war. China, however, has tried to push more material to India with cut prices amid the US-China trade war, as domestic demand in the world's second-largest economy remained weak. Syria is opening up following a regime change and lifting of sanctions by both the US and EU.

Additional reporting by Aswin Kondapally, Nadim Salamoun, Jasmine Khoo, Samuel Wong, Melanie Wee, and Angeline Soh



The Diwali festival of light should boost demand for plastic end-products

Pricing briefs

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EUROPE

EC starts investigating BDO imports

The European Commission has initiated an anti-dumping investigation into imports of butanediol (BDO) from China, Saudi Arabia and the US. The initial complaint was lodged by INEOS Solvents SA on 3 April, and according to a document published in the Official Journal of the European Union on 6 June, the investigation is underway. BDO is a chemical intermediate used in the production of polymers, solvents and fine chemicals.

RDF bale prices fall to record lows on oversupply

Europe high-plastic content refuse derived fuel (RDF) bale prices have hit fresh record lows of minus €270/tonne ex-works Europe, with values in the Nordics representing the bottom end of the range. Demand throughout 2025 to date has been weak on limited buying interest from the key cement and lime industries, as well as delays in the granting of shipment and environmental permits.

Melamine contract prices fall on weak demand

European melamine June and Q2 contract prices have been assessed at double-digit decreases, depending on starting point and account, as demand has not recovered during the quarter. June prices were assessed at a €30/tonne decrease on the low end and a €20/tonne decrease at the high, bringing the range to €2,630-2,870/tonne free delivered (FD) northwest Europe (NWE). There were sporadic reports of rollover agreements, though not widely confirmed.

Jet fuel prices extend gains as demand recovers

European jet fuel prices extended gains in the week to 11 June in response to a pick up in buying interest as seasonal demand gets underway. Differentials and crack spreads edged higher despite mounting pressure from increased refinery output and in-

flows. Jet fuel differentials to ICE gasoil futures rebounded back to late May highs.

June polyol contract prices assessed lower

European slabstock conventional flexible polyether polyols contract prices for June were assessed lower on weak demand and plentiful supply. Prices for June were assessed in line with feedback received for absolute prices and deltas. Some prices were outside the final assessed range at both ends.

Bioethanol spot prices fall on ARA oversupply

Signs of oversupply in the Amsterdam-Rotterdam-Antwerp (ARA) region brought on by imports from the US resulted in European bioethanol spot prices falling over the week. Lacklustre trading materialised as players refrained from procuring on the spot and paper markets. "What I see is unbelievably low prices in Europe right now. My impression is that we are totally long in ARA," stated a player in Germany.

MEG delayed May contract settled at €25/tonne fall

The delayed Europe monoethylene glycol (MEG) May contract has settled at €772.50/tonne, a €25/tonne decrease from April. In a rare occurrence, four market participants failed or declined to confirm the monthly contract price therefore, a split settlement was achieved. A first was agreed at €785/tonne on 2 May and a settlement at €760/tonne was also agreed on 29 May. The ECP was assessed at a midpoint between the two.

MMA spot prices fall as buyer inventories fill

Europe methyl methacrylate (MMA) spot prices fell for a fourth consecutive week as low downstream demand has left buyers with inventories that are close to full. Spot prices dropped by their steepest since November 2024, falling €95/tonne at the low end and €85/tonne at the high end.

The spot market is sluggish as stocks and contracted volumes are covering most of the demand in many struggling downstream industries.

PA spot prices soften, supply remains ample

European phthalic anhydride (PA) spot prices have eased for flake material amid lower offers in the market. Liquid prices also declined slightly to reflect the recent market trend. Flake PA prices were assessed at €1,125-1,235/tonne FD NWE, while liquid PA prices were assessed at €1,170-1,210/tonne FD NWE. Demand is steady at a low level, without the usual uptick typically seen in Q2.

ASIA

Firm upstream pushes up Asian paraxylene

The lack of confidence for a strong demand recovery in the downstream polyester markets in China acted as a strong headwind for higher prices for paraxylene (PX) in Asia. Despite the overnight gains in upstream crude prices, prices in the Chinese futures market did not echo the same sentiment. The PX futures for September contract was up by yuan (CNY) 8/tonne day on day.

Sinopec cuts east China propylene list prices

China's petrochemical giant Sinopec cut its propylene list prices in east China by yuan (CNY) 100/tonne on 10 June. Its subsidiary, Zhenhai Refining & Chemical Co (ZRCC), adjusted its propylene offers down to CNY6,300/tonne ex-tank, while another subsidiary, Jinling Petrochemical, cut its prices to CNY6,250/tonne ex-tank. Downstream producers in Zhejiang, a major province in east China, were not willing to purchase domestic spot cargoes.

Pakistan PE stable to soft amid weak sentiment

Polyethylene (PE) prices in Pakistan followed a stable to soft direction during the week ended 6 June 2025, depending on grade. High density polyethylene (HDPE)

film and blow-molding (BM) prices settled at \$910-930/tonne and \$930-950/tonne CFR Pakistan, respectively, tracking softer deals and offers for GCC-origin material. Low density PE (LDPE) film and linear low density PE (LLDPE) film prices were stable at \$1,060-1,080/tonne and \$930-950/tonne CFR Pakistan, respectively.

Pakistan PP prices softer on bearish sentiment

Prices for all grades of polypropylene (PP) in Pakistan softened in the week ended 6 June, tracking bearish market sentiment and lower deals and offers for GCC-origin material. PP raffia and block co-polymer prices settled at \$930-950/tonne and \$960-980/tonne CFR Pakistan, respectively. Demand for raffia is expected to remain weak through the summer low-demand season.

MIDDLE EAST/AFRICA

GCC PE prices stable during Eid ul Adha

Polyethylene (PE) prices in the Gulf Cooperation Council (GCC) remained stable during the week ended 6 June 2025, with little to no market activity taking place amid Eid ul Adha celebrations. Low density polyethylene (LDPE) film and linear low density PE (LLDPE) film prices were unchanged at \$1,140-1,170/tonne and \$960-1,030/tonne DEL GCC, respectively. High density PE (HDPE) film and blow-molding (BM) prices were unchanged at \$960-1,030/tonne and \$970-1,050/tonne DEL GCC, respectively.

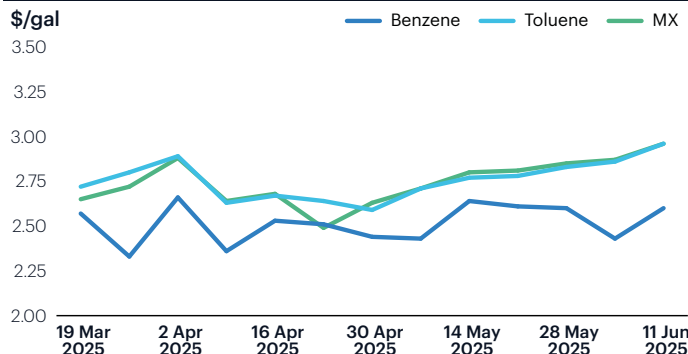
GCC PP prices stable amid Eid ul Adha lull

Polypropylene (PP) prices in the Gulf Cooperation Council (GCC) market remained stable during the week ended 6 June 2025, with little to no market activity taking place amid Eid ul Adha celebrations. PP raffia and block co-polymer prices were stable at \$970-1,030/tonne and \$1,030-1,070/tonne DEL GCC, respectively. Post-Eid pick-up will be attenuated by the low seasonal demand during summer in the region.

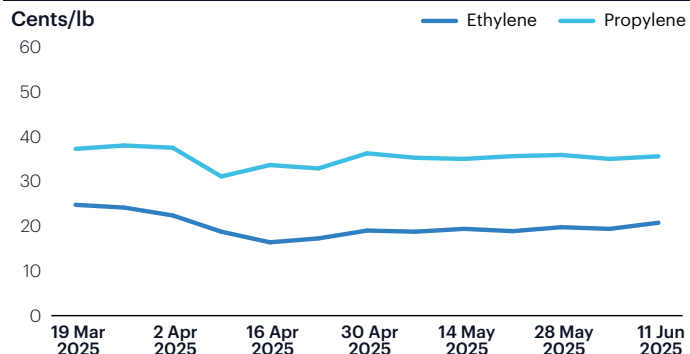
ICIS News weekly price snapshot

Reported in ICIS News evening snapshots, Wednesday 11 June 2025

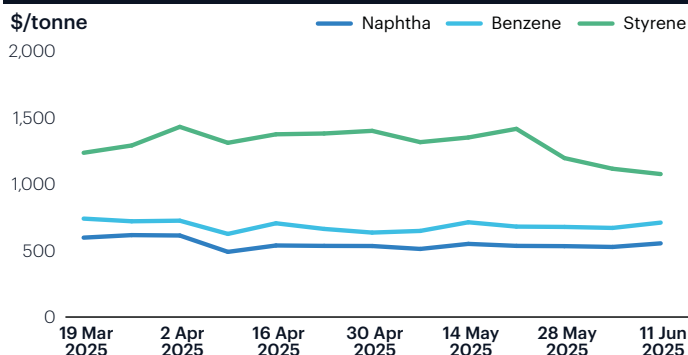
US benzene, toluene, MX



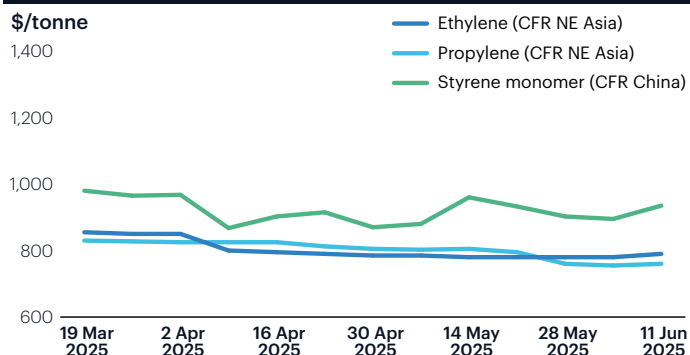
US ethylene, propylene



Europe benzene, styrene, naphtha



Asia ethylene, propylene, styrene



ICIS general methodology

ICIS continuously develops, reviews and revises its methodologies in consultation with industry participants. Product specifications and trading terms and conditions used aim to reflect typical working practices prevalent in the industry. ICIS publishes market prices based on information continuously gathered from market participants about: spot transactions, spot bid and offer levels, contract price negotiations, prices of related commodities, and relevant freight costs. For the entire general methodology, visit: www.icis.com/about/methodology/general

Regional snapshot data: 11 June 2025

Product	Price (\$/tonne)	Change on week
Naphtha	554.00	27.00
Benzene	710.00	40.00
Styrene	1,075.00	-40.00

EUROPE

ASIA

AMERICAS

Product	Price	Change on week
Ethane (cents/gal)	22.65	3.59
Toluene (\$/gal)	2.96	0.10
Benzene (\$/gal)	2.60	0.17
MX (\$/gal)	2.96	0.09
Ethylene (cents/lb)	20.75	1.38
Propylene (cents/lb)	35.58	0.58

Product	Price (\$/tonne)	Change on week
Naphtha	577.00	4.00
Benzene	724.50	18.00
Toluene	681.50	-1.50
Ethylene	790.00	10.00
Propylene	760.00	5.00
Styrene	935.00	40.00

Asia / Americas

China exports to US to rebound

June will see a major recovery as exporters seek to get ahead of a key trade deadline

Nurlugman Suratman
Singapore

China's exports to the US are expected to rebound in June as exporters ramp up frontloading efforts before the 90-day trade truce between the two global economic superpowers expires in August.

Despite the tariff rollback in mid-May, US-bound exports fell by 34.5% year on year in May to \$28.8 billion, a sharper decline than the 20.9% fall recorded in April, official data showed on 9 June.

"The boost from the US tariff rollback should be more significant in June, as it might take a couple of weeks to restore the logistics network that was disrupted by what had nearly become a US-China trade embargo," Japan's Nomura Global Markets Research said in note.

"This could be because, as bilateral trade collapsed in April amid exceptionally high tariffs imposed by the two countries, many container ships for US-China shipping lanes were re-routed to other lanes."

A 90-day trade truce between China and the US was agreed on 12 May but ongoing negotiations face threats from slow rare-earth shipment approvals.

US tariffs on Chinese goods were at 30% from 14 May to 12 August, while China levies 10% duties on US imports.

The sharp recovery in container bookings and freight rates also indicate an incoming rebound in US-bound exports in June, according to Nomura.

"The temporary trade truce will provide room for exports to strengthen in June-August before the momentum reverses with payback from the strong frontloading to-date," said Ho Woei Chen, an economist at Singapore-based UOB Global Economics & Markets Research.

China's imports from the US fell by 18.6% year on year to \$10.8



China shipments to the US are expected to surge in June

billion in May, a steeper decline than the 13.9% fall recorded in April, "perhaps due to similar issues with near-term shipping capacity", Nomura noted.

As a result, the US share in China's total exports fell further to 9.1% in May from 14.7% for the whole of 2024.

Following substantial export contraction and a less severe import decline, China's trade surplus with the US decreased further to \$18.0 billion in May from \$20.5 billion in April.

Export growth slows

China's overall exports fell by 4.8% year on year to \$316.1 billion in May, slowing from the 8.1% growth in April. Imports fell by a steeper rate of 3.4% year on year to \$212.9 billion in May, from the 0.2% contraction in April. China's overall trade surplus increased 25% year

on year to \$103.2 billion in May.

Export growth to its largest market, ASEAN, which is also widely viewed as a major rerouting pathway for China's US-bound shipments, slowed to 14.8% year on year in May from 21.1% in April.

This was mainly a result of base effects, as growth of exports to ASEAN surged to 24.8% year on year in May last year from 13.0% a month earlier, Nomura noted.

Among ASEAN countries, Vietnam and the Philippines took in higher volumes of Chinese exports in May.

China's exports to the EU, Canada and Australia improved in May, as exporters shifted to developed markets other than the US.

"The acceleration of exports to other economies has helped China's exports remain relatively buoyant in the face of the trade war,"

Lynn Song, chief economist for Greater China at ING said in a note.

Exports mixed

China's ships and semiconductors registered solid double-digit export growth, while shipments of motor vehicles and auto parts also picked up.

Demand for chips, in particular, continued to benefit from the pause in US tariffs on technology products such as smartphones, computers, and semiconductors.

However, exports of rare earth materials shrunk sharply, and products such as handbags, footwear, toys, and furniture declined due to a drop in US demand.

US-China talks resume

Following a rapid re-escalation in late May, trade tensions between the US and China eased on 5 June following a phone call between US President Donald Trump and China President Xi Jinping. It set the stage for a new round of dialogue between their top trade officials in London this week.

Ahead of the trade talks, China reportedly approved temporary export licenses to rare earth suppliers of the top three US automakers, as Trump claimed Xi agreed to restart the flow of rare earth minerals.

"As US and China resumed trade negotiations this week, China's Commerce Ministry confirmed that it has granted approval to some applications for the export of rare earths which will likely lead to a recovery in rare earth exports in June," UOB's Ho said.

"Following the Phase 1 trade deal in 2020, we think an eventual trade deal this time would likely commit China to reduce its trade surplus with the US by increasing its US imports," she said.

While the baseline tariff rate for China is likely to be raised, the two countries may find common ground on the Trump administra-

Continued on P13 ►

Europe

BD spot prices soften on imports

While prices ease, several planned and unplanned outages could tighten domestic supply

Melissa Hurley London

European butadiene (BD) spot prices eased at the start of June due to declines in Asia, stable-to-low demand conditions and expected turnarounds coming to an end in June.

European export BD spot prices were assessed softer on a notional basis, in line with indications from the market last week, bringing the range to \$720-800/tonne FOB (free on board) ARA (Amsterdam Rotterdam Antwerp).

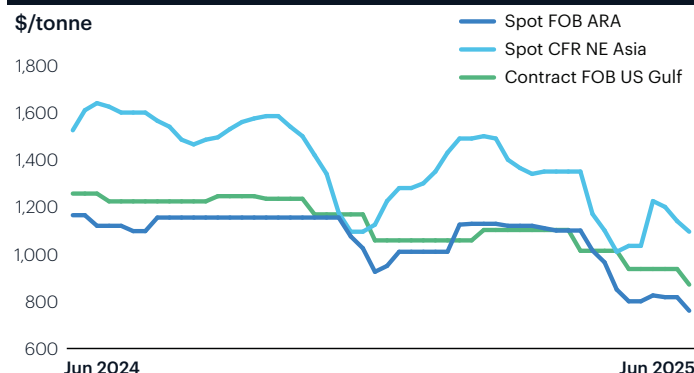
There was mention of interest for a US vessel destined for Asia for H1 July loading, but further shipping details were not confirmed last week.

Pricing pressure continued in Asia, bringing prices to \$1,050-1,140/tonne CFR (cost and freight) NE Asia. Demand uncertainty continues to hamper consumer confidence in Asia. The market appears to be adopting a wait-and-see attitude due to the lack of clarity surrounding downstream demand during the current 90-day tariff pause window with the US. There is optimism things will become clearer after 9 July.

Despite the demand uncertainty in Asia, there are several planned and unplanned outages which could tighten domestic supply. Previously, the Navigator Atlantic vessel was fixed for June loading from ARA to Asia, which is expected to arrive in August.

European domestic spot discounts are still in single-digit terri-

Global butadiene



tory but are indicated slightly lower against the June contract price at the end of last week.

There was no concluded business reported, as demand for spot volumes appeared low. Contractual demand was pegged at a lower level for larger consumers. There was also mention of stability in terms of demand in one case. Certain BD derivative markets are experiencing larger reductions in demand.

Europe contract prices

The contract pricing gap between the US and Europe continues to be highlighted. There are concerns surrounding EU customers struggling to remain competitive and ongoing uncertainty over whether the US market will remain at a lower level versus Europe.

US tariff uncertainty continues to overshadow the markets during the 90-day pause.

The 90-day pause on retaliatory tariffs between the US and China did not eliminate the duties on steel, aluminium and auto parts, all of which could lower automobile production and reduce demand for the plastics and chemicals used to make the vehicles.

US President Donald Trump doubled tariffs on steel and aluminium to 50%. Tariffs on steel and other metals could ultimately reduce capital expenditure (capex) in chemicals and industrial plants as costs rise, Kevin Swift, senior economist for global chemicals at ICIS, said previously.

The European BD contract reference price for June dropped by €50/tonne compared with May. Discussions were challenging and took longer to reach an agreement, as was also seen last month.

Drivers include lower naphtha values, easing natural gas prices and previous developments in Asia, resulting in consumers re-

couping some cost relief from the previous month.

There were also motivations for more cost relief mentioned on the consumer side of the market. Equally, on the supply side, not all were on board for a decrease of this magnitude but ultimately, a compromise was reached.

Outages set to end in June

In Europe, the planned turnaround at TotalEnergies' cracker in Gonfreville in France is expected to finish this month. Versalis' cracker at Dunkirk in France is still largely expected to be back online in June after the unplanned outage but this is not yet officially confirmed.

The Libyan cracker is set to restart production, but this is not officially confirmed.

Crude C4 (CC4) spot activity was slow in May and early June with a lack of buying interest seen at higher prices.

Dow's No 3 cracker at its Terneuzen, Netherlands, site is due to be idled this month. The process is underway, with local media carrying flaring notices from 2 June.

In related news, LyondellBasell said it had entered exclusive talks for Europe asset divestments – the sites are Berre, France; Muenchmuenster, Germany; Carrington, UK; and Tarragona, Spain.

Longer term, the cracker rationalization in Europe is expected to reduce CC4 supply after 2026. ■

» Continued from P12

tion's concerns regarding China's involvement in the fentanyl trade, according to Ho.

"This could potentially lead to a removal of the 20% fentanyl-related tariff, in the optimistic scenario. Thus, it is conceivable that the 'final' US tariff rate on imports from China may settle between 30% to 60%," said Ho.

Freight rates on the rise

US-bound freight rates have remained elevated, while growth in weekly container throughput dropped to 1.3% year on year on 8 June from 10.2% a week earlier, which "dims the outlook of China's overall exports", Nomura said.

The China Containerized Freight Index (CCFI), which tracks average shipping prices from

China's 10 major ports, rose 3.3% week on week as of 6 June, it said. This included a 1.6% increase to Europe and a 4.1% rise to the US East Coast.

In contrast, the Ningbo Container Freight Index (NCFI), tracking outbound container shipping costs, eased 0.4% week on week on 6 June, according to Nomura. Specifically, it saw a 9.1% decline to

the US West Coast and remained unchanged for the US East Coast during the same period.

Internationally, the Freightos Baltic Index (FBX), reflecting spot rates for 40-foot containers across 12 global trade lanes, surged by 52.3% week on week on 6 June, "indicating a significant jump in global shipping costs", Nomura said. ■

Americas

Tariffs put lid on US PP recovery

Braskem executives see tariff uncertainty causing customers to delay purchases, keep lean inventories

Al Greenwood Colorado Springs

Uncertainty surrounding tariffs is tempering what could be a recovery in US demand for polypropylene (PP), executives at Braskem said. Uncertainty about the final makeup of tariffs and their effects on end markets have caused consumers and companies to delay purchases, said Alexandre Elias, vice president, PP, North America and Europe, Braskem. Elias made his comments in an interview with ICIS on the sidelines of the annual meeting of the American Chemistry Council (ACC).

Companies are reluctant to build inventories and make investments – especially industrial PP customers that have long investment cycles, Elias said.

Tariff impact

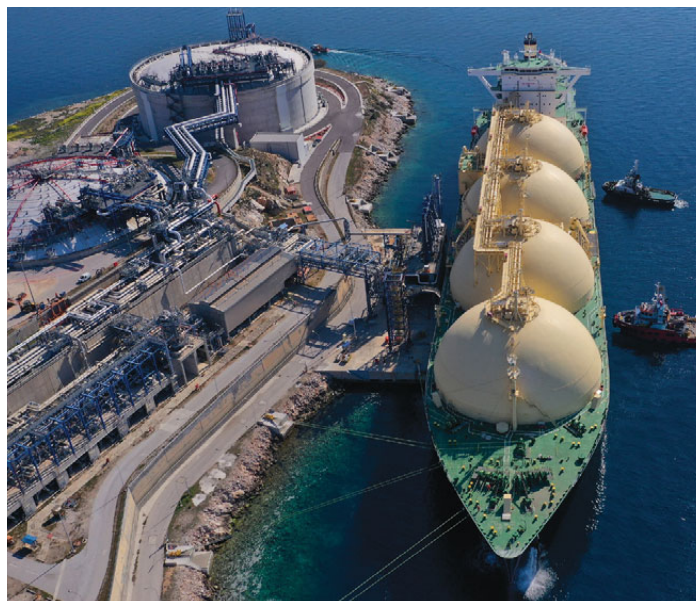
Automobiles are one of the main end markets for PP, and the tariffs have had mixed effects on production, contributing to the uncertainty of PP demand from the sector.

The US has imposed tariffs on imports of automobiles and auto parts, which could ultimately stimulate local production and PP demand.

Prior to those tariffs, consumers splurged on automobiles to beat the tariffs. All of that pre-buying lowered inventories of US autos, said Bill Diebold, vice president – commercial, Braskem America, polyolefins. US producers will ultimately replenish those inventories, which will further increase auto output and PP demand.

On the other hand, consumer confidence has fallen after the introduction of the tariffs and that tends to slow demand growth for automobiles and other durable goods that are made with PP.

Chinese restrictions on shipments of rare earth magnets could cause some automobile companies to shut down production within weeks if they cannot find worka-



Restrictions on US LPG exports to China would have a major impact on PP trade flows

rounds, according to an article from the Wall Street Journal.

The US recently increased its tariffs on imports of steel and aluminium to 50% from 25%, which would increase production costs for US automobiles and potentially make them less affordable.

The future of the tariffs themselves is uncertain because the US frequently changes the rates. It could impose new tariffs, and the courts could rule that the US lacks authority to impose them under a key provision.

The interactions of all of these variables make it difficult to forecast PP demand from the US automobile industry, Elias said.

PP demand remains flat

In the US, PP demand is up in Q2 versus Q1 but flat year on year, Diebold said. Similarly, demand improved in Q1 versus Q4, the latter of which was a challenging time for the US market.

Packaging, another major end market for PP, remains strong.

PP is enjoying a boost from a wave of product substitutions, Elias said. Over the years, many polystyrene (PS) processors have

switched to PP because of its price. Many of those substitutions have played out, but a smaller wave is now taking place. That said, uncertainty could be capping the potential of product substitutions from other processors.

LPG restrictions

Global trade flows of PP could change significantly if the US restricts exports of liquefied petroleum gas (LPG) to China.

China relies heavily on US LPG shipments to provide feedstock for its large fleet of propane dehydrogenation (PDH) units, which produce on-purpose propylene.

The US already has imposed restrictions on exports of ethane to China, which would disrupt a few ethane crackers in the country. If trade tensions rise, it could expand the restrictions to cover LPG.

Global markets got a taste of the ramifications of restricted LPG shipments earlier this year when China increased tariffs on US imports by triple digits.

Had China maintained those increases, Chinese propylene production would likely fall, according to ICIS. China could still

procure LPG from exporters from other parts of the world, but that would increase costs and make some production uncompetitive.

Lower Chinese propylene production would have a cascading effect. It could lower domestic production of PP and cut down on Chinese exports to other parts of Asia.

That, in turn, could allow domestic Asian producers to sell more material locally, allowing them to be less aggressive about exporting PP, Elias said.

"This could have a significant impact on trade flows globally," Elias said.

In fact, restrictions on US LPG shipments to China would likely have a bigger effect on PP trade flows than actual tariffs on the resin. So far, the introduction of US tariffs has had little direct effect on US PP, because the market is relatively balanced.

In 2023 and 2024, apparent consumption was about 85% of total production in the US, according to the ICIS Supply and Demand Database.

Braskem does have an option to export PP from a terminal in Charleston, South Carolina, US but this terminal functions more as a way to take advantage of arbitrage opportunities and leverage its PP plants in North America, Elias said. As an option, it has worked well.

Propylene capacity

Braskem relies on third parties for propylene for its PP plants in the US. So far, there is no need for Braskem to build its own propylene capacity, Elias said.

The US is long in propylene, as illustrated by the global competitiveness of its exports, he said.

While Braskem has relied on propylene imports from Canada, trade tensions between it and the US have eased. Were trade tensions to resume and cause an increase in tariffs, Braskem could manage around it, Elias said. ■

Americas

NOVA accelerates circularity push

CEO Roger Kearns sees potential for additional SYNDIGO plastic films recycling projects

Joseph Chang Colorado Springs

Canada-based NOVA Chemicals is sharpening its focus on recycled plastics with the start-up of its first plastics films recycling facility – SYNDIGO1 – and plans for additional such projects.

“Not only are geopolitical events moving quickly, but customer demands and needs as well. Two years ago, we shifted strategy and pivoted from our aspirations for 2030, to executing on targets right now,” said Roger Kearns, CEO of NOVA Chemicals, in an interview with ICIS.

“We accelerated our push on circularity because recycling is what customers are asking for today,” he added.

Kearns spoke to ICIS on the sidelines of the American Chemistry Council (ACC) Annual Meeting.

Two weeks ago, Kearns attended the grand opening of NOVA’s SYNDIGO1 recycled linear low density (R-LLDPE) films plant in Connersville, Indiana which is expected to fully start up by early 2026 with 100 million lb/year (45,000 tonnes/year) of output capacity.

The CEO calls the SYNDIGO1 facility the “most sophisticated plastic films recycling plant in the world”, mechanically recycling post-consumer films.

In 2024, its mechanical recycling process received a first-of-its-kind Letter of Non-Objection (LNO) from the US Food and Drug Administration (FDA), confirming its ability to produce post-con-



NOVA’s plastic films recycling project in Connersville, Indiana is expected to fully start up by early 2026

sumer R-LLDPE that is suitable for food contact applications.

In April 2025, it achieved the Recycled Material Standard (RMS) certification from Green Blue, which verifies that the SYNDIGO

recycled PE is 100% post-consumer recycled content. Three of four lines are currently in operation, with the facility expected to be fully operational by the end of 2025.

“Film recycling is hard, and we are working hand-in-hand with all aspects of the value chain already,” said Kearns.

NOVA already has offtake agreements with 6-7 significant players in the food packaging space, accounting for the bulk of the plant’s capacity, he pointed out.

If the process and business model of SYNDIGO1 prove themselves out, NOVA will naturally look to build additional SYNDIGO projects, said the CEO.

“If we can make it work, it’s a good opportunity to be the first of several,” said Kearns. ■

Europe

Dow Stade site offers infrastructure opportunity

Joseph Chang Colorado Springs

Dow’s site in Stade, Germany has significant infrastructure assets and the potential to host additional investments from third parties, its CEO said.

Dow is undergoing a major European asset review. Initially focusing on polyurethanes (PU), it recently expanded this to include its cracker in Boehlen, Germany, chlor-alkali and vinyls (CAV) assets in Schkopau, Germany, and upstream siloxanes in Barry, UK.

The European assets under review in PU include CAV, isocyanates, and propylene oxide (PO) and derivatives.

Dow operates the largest PO plant in Europe at Stade at 630,000 tonnes/year. It also produces chlorine, caustic soda, ethylene dichloride (EDC) and methylene diphenyl diisocyanate (MDI) at the site.

“As we look at our asset foot-



Dow’s Stade, Germany site has access to a deepwater port

print in Europe... with our PU business... the most value creating option is to find a better owner for it than to shut it down,” said Jim Fitterling, CEO of Dow, in an interview with ICIS.

“One of the most valuable portions of that business is the Stade, Germany site. It has access to a deepwater port and an LNG (liquefied natural gas) terminal that is being built on that site,” he added.

Fitterling spoke to ICIS on the sidelines of the American Chemistry Council (ACC) Annual Meeting.

“We have a ton of interest from third parties coming onto that

site who are looking at hydrogen production, carbon capture, a host of other things. It’s a very strategic location,” said Fitterling.

While a better owner of the site would not necessarily be an infrastructure company but a strategic buyer, the site lends itself to infrastructure opportunities, he noted.

“[Even] without that kind of focus like we created [in the US] with Diamond Infrastructure Solutions, there’s already a high amount of interest. And I think there will be a high amount of interest from the German government on how that site develops. Not very many sites

have the unique properties that Stade has,” said Fitterling.

On 1 May, Dow completed the \$2.4 billion sale of a 40% stake in its Diamond Infrastructure Solutions business to Macquarie Asset Management which has the option to increase its stake to 49% in the following six months for \$600 million.

The assets include power and steam production, pipelines, environmental operations and general site infrastructure located at five of Dow’s sites on the US Gulf Coast – Freeport, Texas City and Seadrift in Texas, and Plaquemine and St Charles in Louisiana. ■

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16 – 19 June 2025



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Americas

ACC seeks changes to TSCA rules

Leadership at the trade group wants changes to two Biden TSCA rules under the chemical safety program

Al Greenwood Colorado Springs

A chemical trade group is seeking changes to new rules introduced to the nation's main chemical safety program by the previous administration that it says gums up the approval of uses for new chemicals and makes it harder to review the safety of those already in the market – all while doing little, if anything, to improve safety.

The American Chemistry Council (ACC) has said that the administration of US President Joe Biden introduced many rules that were not based on science and fact, said Kimberly Wise White, vice president of Regulatory and Scientific Affairs for the trade group. She made her comments on the sidelines of the annual meeting held by the ACC.

White stressed that the chemical industry wants a strong framework under the country's chemical safety program, which is known as the Toxic Substances Control Act (TSCA). However, the framework needs to be science and risk based.

One regulation introduced under Biden was the New Chemical Framework Rule, which is part of the larger New Chemicals Program of TSCA. The program evaluates new chemicals for risk before they enter the market.

According to the ACC, the New Chemical Framework Rule does not address the fundamental challenges of the New Chemicals Program – such as consistently missing its 90-day deadline to complete the reviews.

The New Chemical Framework Rule is unnecessary, and the ACC wants the government to rescind it, White said. "The former administration created a rule that really didn't fix any of the problems."

Chemical review program

The ACC flagged another Biden-era rule that complicated the existing chemical review program of



The US EPA will review 31 programs that could have big consequences for the chemical industry

TSCA. This program reviews existing chemicals that are already in the market and assesses whether they pose unreasonable risks.

Biden introduced the Risk Evaluation Framework Rule, which, among other things, assumed that employees were not properly using personal protective equipment (PPE) when handling chemicals.

It also adopted the whole chemical approach to assess whether a chemical posed an unreasonable risk. Under such an approach, if the review finds one condition under which the chemical poses an unreasonable risk, then the review assumes that the substance as a whole poses an unreasonable risk. That finding is regardless of the safety of the other uses.

The whole chemical approach made it more likely that the US Environmental Protection Agency (EPA) would determine that a substance posed an unreasonable risk. Such a finding would expose the chemical to more restrictions.

The latest version of the US chemical safety program was created under the Frank R. Lautenberg Chemical Safety for the 21st Century Act, passed in 2016.

The act included a provision that requires Congress to reauthorize the fees that, among other things, pay for the risk assessments for existing chemicals.

Fee reauthorization opens up an opportunity to adopt legislative changes that address the shortcomings identified by the ACC, said Ryan Jackson, vice president of Federal Affairs for the ACC. If successful, it could make the changes more durable and less likely to be changed under a new administration, Jackson said.

TSCA high priority for ACC

White said that addressing TSCA is a high priority for the ACC. But it is not the only one. The Office of Management and Budget put out a request for information to the public to submit comments about rules under consideration for review, reconsideration or revision. The ACC submitted comments on about three dozen regulations, Wise said.

Reconsidering regulations

In mid-March, the EPA announced reviews of 31 programs. Some of those programs include the following:

- The Risk Management Program (RMP). One RMP rule compromised plant safety by requiring companies to share information that had been off limits since the 9/11 terrorist attacks, according to trade groups.

- A rule by the previous administration that intended to account

for what it described as the social cost of carbon. The ACC said the previous administration did not take steps to get proper feedback from the public, resulting in flawed metrics.

- The Greenhouse Gas Reporting Program, which covers more than 8,000 facilities.

- The Waters of the US Rule, with the intention of reducing permitting and compliance costs.

- Several National Emission Standards for Hazardous Air Pollutants (NESHAPs), which could lead to a two-year compliance exemption. The ACC singled out the Hazardous Organic NESHAP (HON) facilities, which emit ethylene oxide (EO). The ACC said the policy overlooked practical concerns and relevant scientific evidence while jeopardizing the production of essential chemicals.

- Terminating the environmental justice and diversity, equity and inclusion (DEI) arms of the EPA. Environmental justice has made it harder to build chemical plants.

- The particulate matter national ambient air quality standards (PM 2.5 NAAQS). The review could lead to guidance from the EPA that increases both the flexibility and clarity of permitting obligations for chemical plants, according to the ACC.

- The 2009 Endangerment Finding, under which the EPA found that six greenhouse gases (GHG) threatened public health. Those gases were carbon dioxide (CO₂), methane, nitrous oxide (N₂O), hydrofluorocarbons (HFCs), perfluorocarbons (PFCs) and sulphur hexafluoride (SF₆).

- The Regional Haze Program of the Clean Air Act, which directed states to adopt plans to improve air quality at national parks.

- Review Section 111 of the Clean Air Act and Subpart W of the Greenhouse Gas Reporting Program. These required power plants, oil wells and gas wells to report GHG emissions if they reached a certain threshold. ■

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Europe

LyondellBasell sale versus closure

Decision to sell the European olefins and polyolefins assets makes more economic sense than closing

Tom Brown London

The assets LyondellBasell has entered exclusive talks to sell to private equity investor AEQUITA had been cash negative on average to the company over the last five years, with CEO Peter Vanacker welcoming a “clean exit” from the businesses.

The producer announced advanced plans to sell four of its European olefins and polyolefins sites to AEQUITA, which specializes in carve-outs and industrial turnarounds.

The company is set to sell integrated cracker sites in Berre, France, and Munchsmunster, Germany, as well as polypropylene (PP) production facilities in Carrington, UK, and Tarragona, Spain.

“Collectively, the divested sites were, on average, cash negative to LyondellBasell over the past five years, with only modest EBITDA (earnings before interest, tax, depreciation and amortization) and €110 million in annual capital expenditures,” said company CEO Peter Vanacker.

The current agreement takes the form of a put option deed, which grants the owner the right but not the obligation to sell an asset at a specific price.

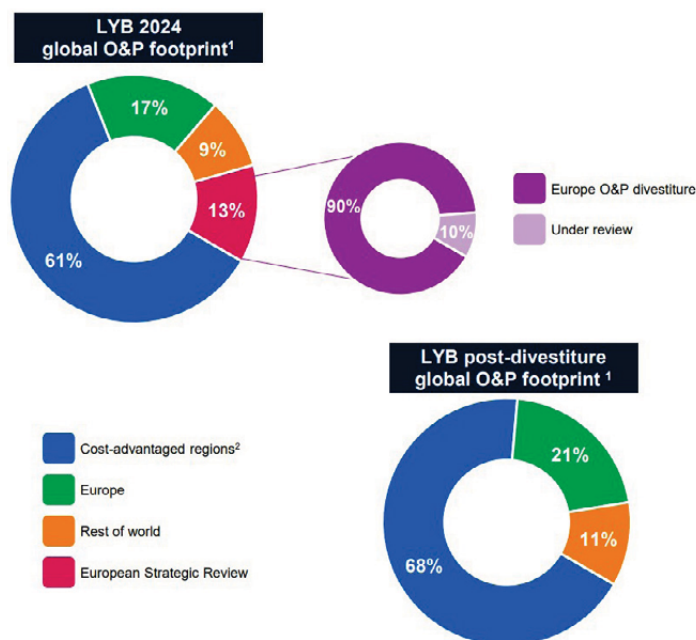
In this case, AEQUITA has agreed to purchase at the agreed-upon terms if LyondellBasell opts to exercise the option after concluding works council consultation processes, with deal closure expected in the first half of 2026.

Cash contribution

Under the terms of the deal, LyondellBasell will contribute €265 million in cash and AEQUITA will inject €10 million, payable at closing, to backstop liquidity requirements and underwrite turnarounds at the newly independent business.

The new owner will assume €150 million in pension and employee liabilities, as well as environmental obligations.

The agreement also provides



LyondellBasell sites to be sold (tonnes/year)

Site	Capacity
Berre, France	Ethylene 465,000
	LDPE 320,000
	PP 350,000
	Propylene 255,000
Munchsmunster, Germany	Ethylene 300,000
	HDPE 320,000
	Propylene 190,000
Carrington, UK	PP 210,000
Tarragona, Spain	PP 390,000

Source: LyondellBasell

scope for an earn-out of €100 million for LyondellBasell over the course of three years, along with a €25 million termination fee if either party breaches certain closing obligations.

Peter Vanacker
CEO, LyondellBasell

“Collectively, the divested sites were, on average, cash negative to LyondellBasell over the past five years, with only modest EBITDA and €110 million in annual capital expenditures”

The sale, which represents the sale of 12% of LyondellBasell’s global olefins and polyolefins footprint, will cut its fixed costs by around €400 million per year, as well as removing €110 million of yearly average capital expenditure obligations.

The exit allows LyondellBasell to refocus that capital towards higher-value opportunities, according to Vanacker.

“This transaction is upgrading our core by increasing the share of our O&P [olefins and polyolefins] business capacity in most advantaged regions from 61 to 68%,” he said, speaking on an investor call.

Sustainability obligations

The sale also reduces the expected cost of LyondellBasell’s sustainability target of reducing Scope 1 and 2 greenhouse gas emissions by 42% by 2030 compared to 2020 levels, and reaching net zero by 2050.

The cost of hitting the 2030 target would have run to the “hundreds of millions of dollars”, according to LyondellBasell executive vice president of global O&P Kim Foley.

“If your aspiration is to get to net zero in the future... you’re talking a billion [euros or more],” she said.

Those costs may be less onerous under private ownership, compared to a publicly traded business under pressure to show leadership on sustainability and decarbonisation, Vanacker added.

“It’s always a bit different... if you look at decarbonization costs and how fast you want to decarbonize if you’re for a public company versus if you’re under private ownership,” he said.

“We as LyondellBasell have made clear commitments that... we want to reduce our Scope 1 and Scope 2 emissions by 42% [by] 2030. A leading company... [will] want to meet these commitments and assets. If you don’t have those commitments, you maybe follow just what is regulatory,” he added.

Sale versus closure

The deal follows LyondellBasell’s decision to shut down and demolish its flagship propylene oxide/styrene monomer (POSM) unit in the Netherlands, a joint venture with Covestro.

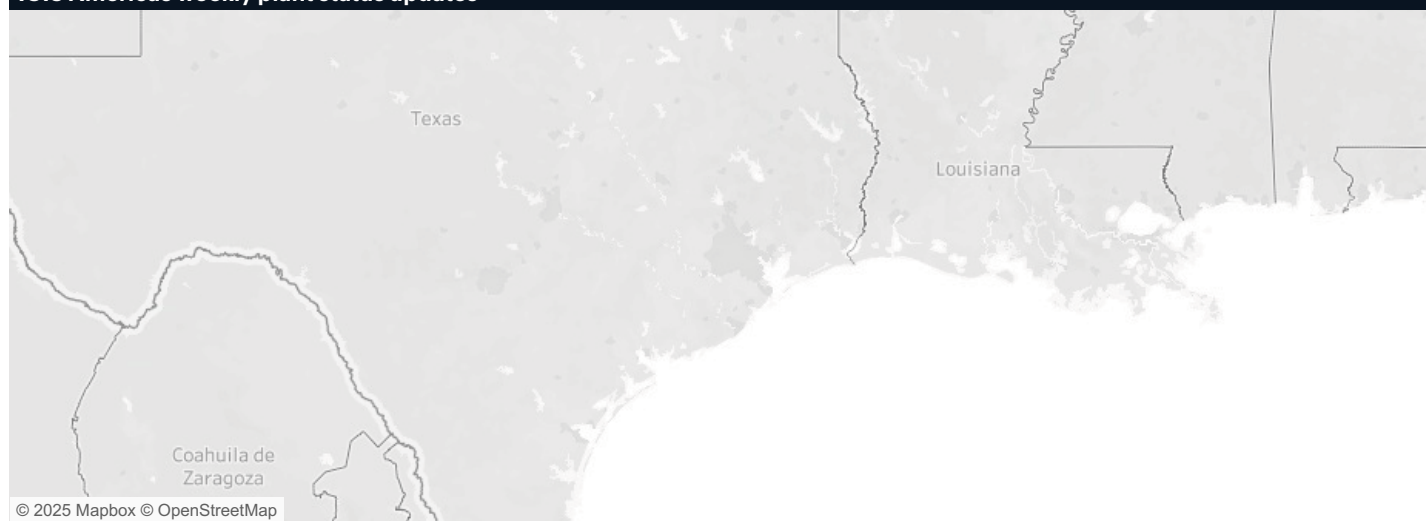
The company estimated the exit costs of the closure at \$117 million in its Q1 results statement.

While the POSM unit was relatively young at the time of its final shutdown at just over two decades of operation, many of the assets being sold are older and could have faced higher shutdown costs, he said. ■

Global plant status update

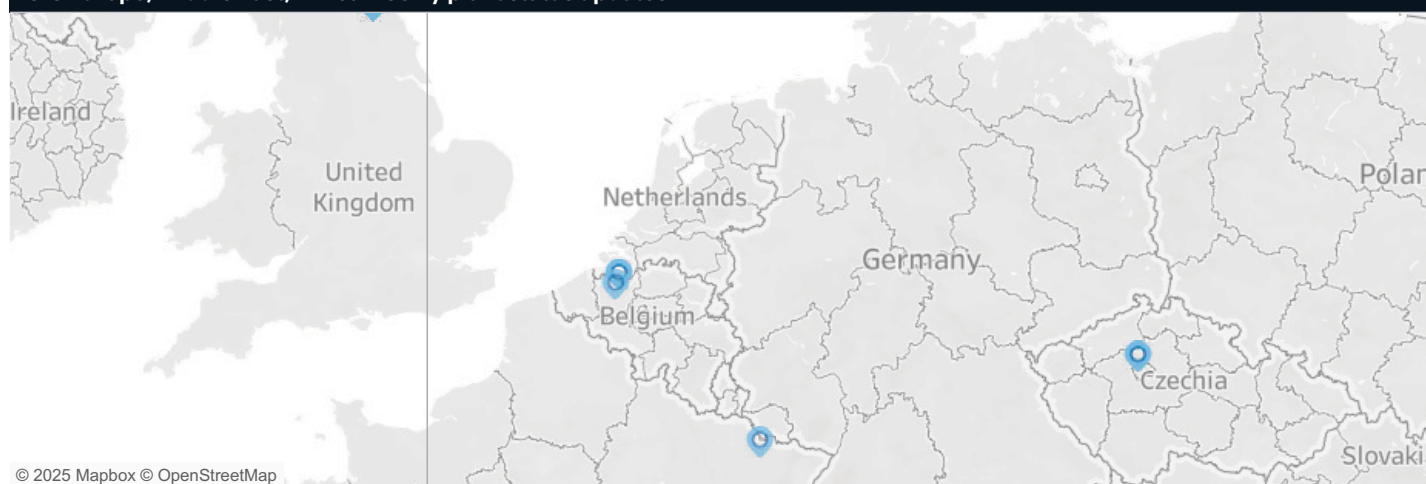
Click on the maps to view major plant disruptions, shutdowns and restarts reported by ICIS for the week from 5-11 June 2025

ICIS Americas weekly plant status updates



Company	Commodity	Annual Capacity (tonn..	Outage Start Date	Outage End Date	Cause	Latest A
INDORAMA VENTURES	PET RESINS	550,000	05/05/2025 00:00:00	09/06/2025 00:00:00	Scheduled	1110907

ICIS Europe, Middle East, Africa weekly plant status updates

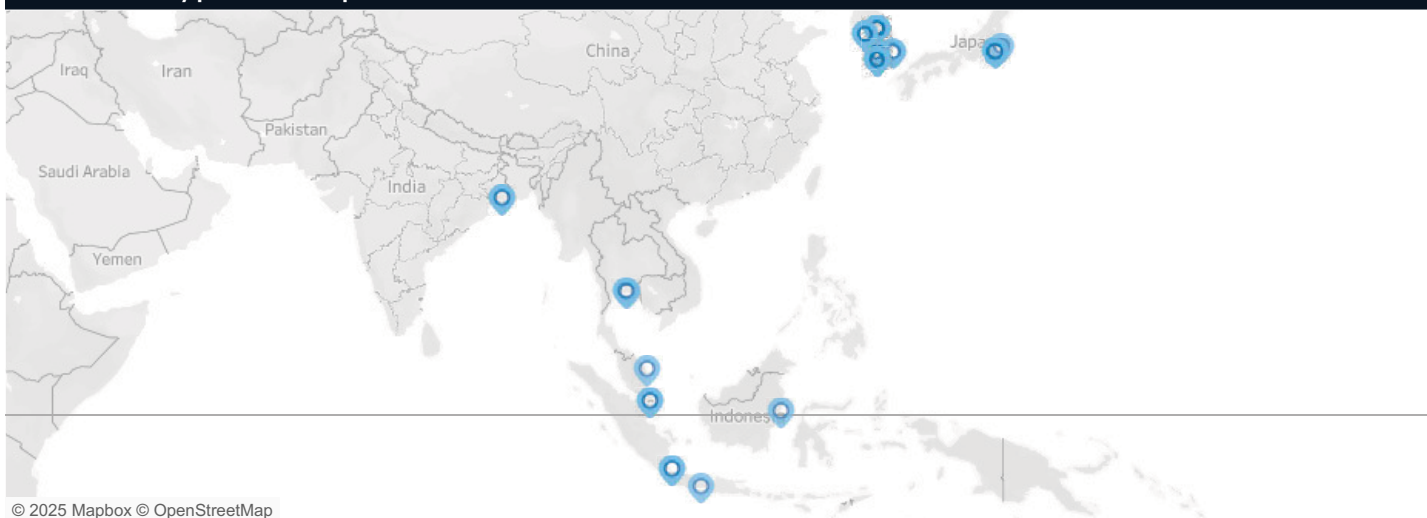


Company	Commodity	Annual Capacity (tonn..	Outage Start Date	Outage End Date	Cause	Latest Art
SPOLCHEMIE	EPOXY RESINS	30,000	01/08/2025 00:00:00	22/08/2025 00:00:00	Scheduled	11109215
SPOLCHEMIE	EPOXY RESINS	30,000	01/08/2025 00:00:00	22/08/2025 00:00:00	Scheduled	11109215
TOTALENERGIES	LDPE	110,000	06/06/2025 00:00:00	27/06/2025 00:00:00	Unscheduled	11109051



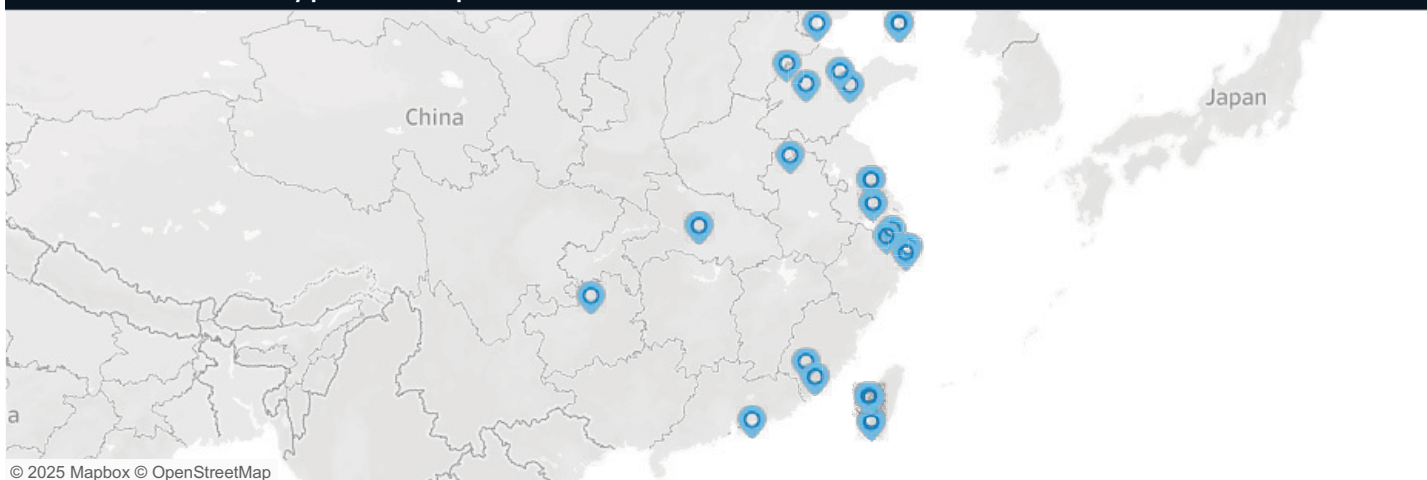
Click on the maps to see a weekly summary of all new plant disruptions, shut-downs and restarts which appear on the [ICIS Live Supply Disruption Tracker](#)

ICIS Asia weekly plant status updates



Company	Commodity	Annual Capacity (tonn..	Outage Start Date	Outage End Date	Cause	Latest Artic
S-OIL CORP.	PROPYLENE OXIDE	300,000	10/06/2025 00:00:00	25/06/2025 00:00:00	Unscheduled	11109119
IRPC	PROPYLENE	320,000	01/06/2025 00:00:00	30/06/2025 00:00:00	Scheduled	11109129
GS CALTEX	PROPYLENE	230,000	01/06/2025 00:00:00	30/06/2025 00:00:00	Scheduled	11109128

ICIS Northeast Asia weekly plant status updates



Company	Commodity	Annual Capacity (tonn..	Outage Start Date	Outage End Date	Cause	Latest Artic..
SINOPEC JINAN CO.	BASE OIL GROUP II	547,575,000	11/04/2025 00:00:00	10/06/2025 00:00:00	Scheduled	11109487

New projects and permanent plant shutdowns

Reported by ICIS News, 2-8 June 2025

New projects								
Company	Location	Product	Capacity*	Process	Contractor	Cost	Start-up	Status
Chevron Phillips Chemical/ QatarEnergy	Orange, Texas	high density polyethylene (HDPE)	2 million	–	–	part of \$8.5 billion	Late 2026/ early 2027	U
		ethylene	2.08 million	–	–	part of \$8.5 billion	Late 2026/ early 2027	U
	Ras Laffan, Qatar	high density polyethylene (HDPE)	1.68 million	–	–	–	Late 2026/ early 2027	U
		ethylene	1.9 million	–	–	–	Late 2026/ early 2027	U
Cosmo First	Waluj, Maharashtra, India	biaxially oriented polypropylene (BOPP)	81,200	–	–	–	1-Jun-25	C
Datang Duolun Coal Chemical	Duolun, China	methanol	320,000 x 1.68 million T	coal-based	–	–	–	–
		1-butene	61,500	–	–	–	–	–
		alpha olefin	50,000	–	–	–	–	–
		polyolefin elastomer (POE)	240,000	–	–	–	2028	P
Dow	Freeport, Texas, US	polyethylene (PE)	600,000	Solution technology	–	–	Jun-25	C
Shandong Longhua New Material	Zibo, Shandong, China	polyetheramine (PEA)	60,000 x 100,000 T	–	–	–	–	P

Notes: *Capacity: figures given in tonnes/year; tonnes/day are converted by multiplying by 330. (x) = expansion; T = total capacity including expansion. Start-up: Dates given are for planned start-up. H1 = 1st half year; H2 = 2nd half year; Q1 = 1st quarter; Q2 = 2nd quarter; Q3 = 3rd quarter; Q4 = 4th quarter. Status: S = study; P = planned; A = approval; E = engineering; U = under construction; C = completed; D = delayed; CAN = cancelled.



ICIS Topics connects you faster
to the markets and trends that matter



Welcome to the 16th annual Top 100 Chemical Distributors. Look inside to see the leaders of this important element in the chemical industry supply chain

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THE RANKING

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Dynamic distributors

We present and celebrate the ICIS Top 100 Chemical Distributors and their valuable contributions to chemical supply chains in an increasingly volatile world

Will Beacham Barcelona
Joseph Chang New York

Welcome to the ICIS Top 100 Chemical Distributors, a list of the world's most important companies in this important part of the chemical value chain.

The listing is based on 2024 sales and when compiling it the editorial team noticed that many distributors suffered quite substantial drops in revenues last year. It seems that the distribution sector – which is usually more insulated than chemical producers against the ups and downs of the broader economy – finally succumbed to the impact of the downturn which began in 2022.

This coincided with Russia's invasion of Ukraine which sent energy prices rocketing in Europe and triggered the longest downturn in

demand in living memory. Alongside this, China's massive capacity build got underway, creating a major global oversupply situation which is still in full swing.

In the midst of these torrid conditions chemical producers started closing older, smaller and less competitive plants, especially but not exclusively in Europe. Meanwhile profitability for chemical producers plunged with many major listed companies suffering net losses or much lower profits.

Initially, however, chemical distributors' financial results remained robust. In some ways they benefitted from falling demand as downstream customers purchased in lower volumes from distributors rather than direct from producers. Distributors – being asset-light – could also respond with agility to dynamic market conditions through inventory management.

They were also not so exposed as producers to the run up in production costs and impact of overcapacity.

But as the downturn endured, even this sector has proven that it is not immune to the tough conditions endured by upstream producers. Sector leaders such as Brenntag are implementing restructuring programs to cut costs and maintain margins as they wait for conditions to improve.

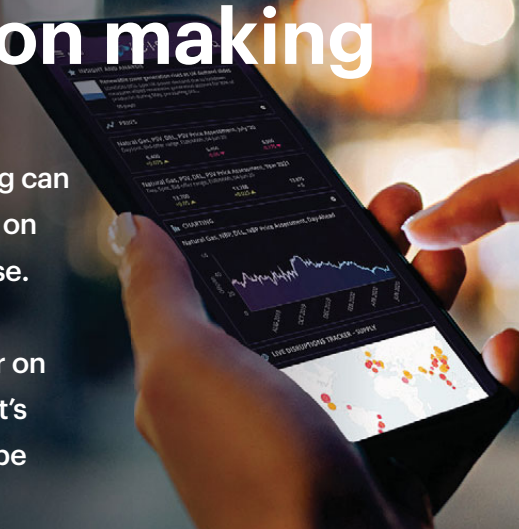
The listing – which includes global and regional leaders – has been published for several years in association with the European Association of Chemical Distributors (Fecc). You can hear Dorothee Arns – the group's director general – in a special edition of the ICIS Think Tank podcast broadcast on Tuesday 17 June and available in all podcast apps. Just search 'ICIS chemicals podcasts.' ■



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Stay ahead of market changes



Quo vadis, Europe chemicals as global challenges grow?

The region's chemical sector faces pressures as traditional ways of doing business are disrupted by the trade war, global overcapacity, high costs and poor demand

Dorothee Arns Director general, Fecce
(European Association of Chemical Distributors)

Working in the chemical industry has always been challenging. Boring times hardly ever happen, due to the overall cyclicity of the business and constantly changing market conditions with the associated imperative to adapt. This is especially true for Europe with its structural competitive disadvantages in energy prices and raw materials, labor costs and taxes, plus consolidating markets. Additionally, chemicals always implied certain geopolitical aspects.

However, what we have seen in the past 12 months, in particular since early April 2025, marks a new dimension, adding more pressures on businesses than ever before. And it becomes more and more evident that these developments are way more than just short-term effects. A lot of them will most likely last for years to come, too, inevitably raising the question: Quo vadis, chemicals in Europe?

To start with the source of the latest external shock: the US tariff policy since early April 2025. Domestically, the US President sees it as fulfilling electoral promises and a good way to bring industrial production back to the US. He wants to use US economic power to force a certain behavior from other countries, even long-standing trade/political partners.

Sanctioning tool

Tariffs are now seen as a sanctioning tool within US industrial policy, and not anymore as a trade defence instrument. Apart from the prospect that certain tariffs are going to stay – regardless of the negotiations during the suspension period of 90 days – the back-and-forth announcements from the US add a lot of uncertainty to international markets, which had already been showing a high level of volatility beforehand.

After a first phase of disbelief and muted disappointment on the side of the EU, it can now be expected that after the most recent US escalation step doubling the tariffs on steel and aluminium imports from the EU to the US as of early June, with an almost non-existent lead time to prepare, the EU will soon enact countermeasures against the US.

Meanwhile a lot of delegations from other parts of the world are arriving in Brussels to negotiate new trade agreements with the EU or to explore other possibilities to enhance economic cooperation.

The traditional saying that new doors open up whenever one door was closed applies also in this case. So here is also an opportunity as the EU is forced to explore new ways of cooperation, leaving traditional paths. T

rade re-routing is not only a snapshot of the moment, but trade diversification is now becoming an explicit target of the EU, opening up new opportunities for European businesses, especially chemical distributors.

Economic adversaries

Uncertainty and volatility are the economic adversaries of consumer spending and business investments, especially in capital-intensive industries like chemicals. Hence, it is not really a surprise that the eagerly expected increase in demand has not happened so far.

At the same time overcapacities, especially in China, bring price and revenue levels under substantial pressure world-wide and in particular in Europe.

With the practical closing of the US market for imports from abroad on the basis of the imposed tariffs, the pressure on Europe will grow further, while the EU becomes more and more vigilant.

The EU has imposed more anti-dumping duties and other trade defence instruments in 2024 than ever before. This trend is very likely to increase further in 2025.

Dorothee Arns
Director general, Fecce

“Distributors view the overall situation with concern, because if all value chains are under stress in Europe, it is only a question of time until they get impacted”



Most recently, there is also more EU attention given to the resilience of critical value chains in Europe. It is actually a “no-brainer” that the chemical value chain is the foundation for all other industries: the functioning of smartphones, semiconductors and other high-tech equipment, windmill blades, solar panels and batteries is based on chemicals. Fresh water supplies, pharmaceuticals, infrastructure and defence systems are other examples.

Hence, the announced capacity closures of more than 11 million tonnes in Europe in 2024 alone and several more in the first months of 2025, mainly for basic chemicals, must be seen as a severe wake-up call for European politicians.

Every plant that closes means less resilient value chains, increased import dependence, a loss of highly-qualified and well-paid jobs as well as innovation potential plus a shortfall of economic revenues locally. Strategically and geopolitically, this is exactly the wrong direction to what Brussels vowed during pandemic times: more self-autonomy.

Critical role

Distributors are now assuming a crucial role in keeping European chemical supply chains up and running reliably, based on their traditional in-built strengths such as supply chain excellence, agility and the flexibility to quickly adapt to new situations. But distributors view the overall situation with concern, because if all value chains are under stress in Europe, it is only a question of time until they get impacted, too.

A lot will depend on how the EU repositions its industry, which by tradition has always been the backbone of its economic and international strength. Since the new Commission took office, competitiveness appears as a key priority in the EU's agenda.

However, wording is not enough. In these strained times businesses are expecting quick, pragmatic, practical political actions to secure a sustainable future of critical value chains.

This implies a new innovative industrial policy for Europe, based on cost-efficient, enabling regulation without additional bureaucracy, plus harmonized standards. ■

Navigating the path forward

The ACD aims to work with Congress to ensure a competitive supply chain

Eric Byer President and CEO, Alliance for Chemical Distribution

In the first six months of US President Trump's second term, the chemical distribution industry has navigated a flurry of activity that's impacted businesses both large and small. Some of the policy changes are positive for Alliance for Chemical Distribution (ACD) members, while other changes have resulted in uncertainty across the chemical supply chain.

As we look forward to H2, we're taking stock of the headwinds and tailwinds shaping our industry and their impact on the supply chain and our partners.

The good news: As one of the most heavily regulated industries in the US, the chemical sector is no stranger to navigating a regulatory landscape that's constantly changing. The last four years presented challenges for ACD members as new rules that were ambiguous, overly burdensome, and, frankly, unnecessary were finalized. Luckily, agencies are now listening to

the industry and working with us to strengthen supply chains while alleviating burdens and financial strain for businesses of all sizes.

On the flip side, the industry has faced tremendous uncertainty when it comes to the administration's approach to tariffs. While we are supportive of ensuring a level playing field for American companies from discriminatory or predatory practices, a certain percentage of raw materials cannot be sourced or not in enough volume in America. ACD members

Eric Byer
President and CEO, ACD

"ACD members are concerned about the impact of higher tariffs on these imports and the long-term impact on the efficient supply chain of chemicals"



are concerned about the impact of higher tariffs on these imports and the long-term impact on the efficient supply chain of chemicals essential to countless sectors.

We are appreciative of the administration for recognizing the critical role chemicals play in our economic and national security by sparing some chemicals from the brunt of new tariffs. However, we are urging the administration not to stop there and instead work with Congress to renew trade programs, like the Generalized System of Preferences, that help support the chemical supply chain and countless small businesses that keep it running. It's critical that a trade agenda leverages a commonsense approach that considers the impacts to industries and customers downstream.

ACD will continue to work with the administration and Congress to navigate through these challenges to ensure the global chemical supply chain remains competitive, supporting our members and downstream partners today and in the years to come. ■

Chemicals, UK Reach fall off the EU-UK political agenda

The EU-UK Summit in May was a missed opportunity to make progress on chemical supply chain and regulatory issues which CBA has been promoting for many years

Tim Doggett CEO, Chemical Business Association (CBA)

The CBA has been representing the chemical supply chain, lobbying and advocating at the highest levels on behalf of members, for over 100 years. This includes leading the discussion on UK REACH. Despite the Association's efforts to make Government aware of the impact of UK REACH, progress has been frustrating. The challenges created as industry awaits an alternative registration model have stifled overall investment, innovation and trade.

Because of the far-reaching impact of UK REACH, the CBA and its members were disappointed the chemical supply chain was overlooked during the EU-UK Summit in May – an event designed to help reset the UK's relationship with the EU and during which we had hoped the strategic importance of the sector

would be recognised. The topic of chemicals was almost entirely absent.

This disappointment was compounded by the Government's decision to shelve the UK Chemicals Strategy. This was a commitment

Tim Doggett
CEO, Chemical Business Association

"The CBA and its members were deeply disappointed the chemical supply chain, and indeed the chemical industry, was overlooked during the EU-UK Summit in May"



made in 2018, and to see it quietly dropped after years of delay was frustrating considering the importance of the chemical industry. The lack of a long-awaited and much-needed Chemicals Strategy not only undermines the UK's global competitiveness but puts the environment and wider economy at risk.

The CBA has been at the forefront of efforts to resolve the future of UK REACH, believing that progress depends on the UK re-establishing a functional and effective relationship with the EU. The Brexit process failed to take into account its impact on businesses, which had enjoyed unfettered trading access throughout the Single Market since 1993. The CBA is committed to lobbying and working closely with all stakeholders to ensure practical, sustainable solutions for resetting the relationship and restoring trade between the UK and EU are prioritised. ■

Brazil faces challenge in tariffs

Distributors to adjust to US tariffs while continuing to make investments in technology to drive operational efficiency and flexibility

Rubens Medrano Associquim

Throughout 2024, Brazil's chemical distribution sector maintained its commitment to innovation, sustainability and excellence in service, ensuring the delivery of safe and efficient solutions aligned with market needs.

The global chemical market has been undergoing significant structural changes and transformations, driven by technological ad-

Rubens Medrano
President, Associquim

"The drastic tariff policy implemented by the US Trump Administration in the US is having a significant impact on imports"



vances, increasingly stringent environmental and regulatory requirements, and changes in consumer profiles and demands.

Chemical distributors are in a continuous process of improvement and have long achieved quality levels comparable to the highest international standards.

Distributors play a strategic role in adding value to the products sold by offering specialized technical services, qualified after-sales support, and laboratory analysis to enhance performance.

Consistent investments in digitalization, modernization of IT infrastructure, and continuous employee training reflect the sector's commitment to ensuring operational efficiency. In this context, technology emerges as a decisive factor in the key trends projected for 2025.

Technology is a key driver of innovation and business performance. In 2025, this will continue to lead the transformation of the distribution sector. In the pursuit of more agile,

sustainable, and efficient processes, technological solutions, cloud storage, and tracking systems are gaining prominence. This is the ideal time to explore new possibilities, invest, and promote changes that enhance productivity gains, reduce costs, lead to a more rational use of resources, and increase flexibility to quickly respond to market dynamics.

The sector has demonstrated resilience and competence in facing challenges imposed by logistical and supply disruptions resulting from geopolitical conflicts in Russia/Ukraine, and in the Middle East, maintaining continuity and security in customer supply.

However, in 2025, the sector faces a new challenge. The drastic tariff policy implemented by the US Trump Administration in the US is having a significant impact on imports, directly affecting the supply chain and requiring strategic actions from the distribution sector in Brazil to mitigate its effects and preserve competitiveness. ■

ICTA advocates for global distribution

The integration of safety, security, and sustainability is essential for shaping a future-ready distribution industry

Robert Stuyt Director general, ICTA

The global chemical distribution industry plays a pivotal role in supporting sectors from agriculture to pharmaceuticals. As the industry grows, so does the complexity of managing its risks and responsibilities. Safety, security and sustainability have become not only essential priorities but also defining factors for the future success of distribution worldwide.

Safety remains the cornerstone of chemical logistics. Handling and transporting hazardous materials demands strict adherence to international safety standards. Companies must invest in training, proper labeling, and risk assessments to prevent accidents and protect both employees and the communities they serve.

Security is equally critical, especially in an

era of geopolitical tensions and cyber threats. Chemicals, if misused or poorly protected, can pose dangers. Securing facilities, monitoring transportation routes, and safeguarding digital infrastructure are vital measures to prevent theft, sabotage, or terrorism.

Regulatory compliance with frameworks such as the EU's REACH or the US Chemical Facility Anti-Terrorism Standards (CFATS) is not optional – it is a minimum standard.

Sustainability, however, is what will define the industry's long-term viability. Stakeholders are demanding greener practices and transparent reporting. This includes reducing emissions, optimizing packaging and embracing circular economy principles. Sustainable operations are no longer a moral imperative alone. They're a competitive advantage in a market that increasingly rewards responsible actors.

Robert Stuyt
Director general, ICTA

"Sustainable operations are no longer a moral imperative alone. They're a competitive advantage in a market that increasingly rewards responsible actors"



Balancing these three imperatives is not without challenges. However, industry collaboration, innovation, and proactive governance offer a path forward. Companies and associations that embed safety, security, and sustainability into their core strategy will not only protect their people and assets – they will lead the transition to a more responsible and resilient global chemical supply chain.

In the face of evolving risks and growing expectations, the integration of safety, security, and sustainability is not just good practice – it is essential for shaping a future-ready chemical distribution industry. ICTA is working on its Global Responsible Distribution program (GRD) which will be launched in the coming period. Supporting this will help achieve your goals! ■



Brenntag adapts to global challenges

World's largest chemical distributor has to help its supply chain partners navigate the most difficult geopolitical and macroeconomic conditions in living memory

Will Beacham Barcelona

The chemical distribution sector is being impacted by many of the same trends affecting its suppliers, with companies such as Brenntag – the world's largest distributor – adapting its business model in a very challenging macroeconomic environment.

Trade war turmoil is affecting sentiment and the broader economy across all chemical industry value chains, and Brenntag – with its

truly global footprint – is no exception.

As Ewout van Jarwaarde, CEO of Brenntag Essentials, explains: "We're seeing a very, very challenging environment out there. In March we saw demand really slowing down, particularly in North America. We see a lower demand versus last year, largely coming from uncertainty in entire value chains."

The shifting tariff landscape is also affecting freight rates around the world with big spikes and shortages of containers and shipping es-

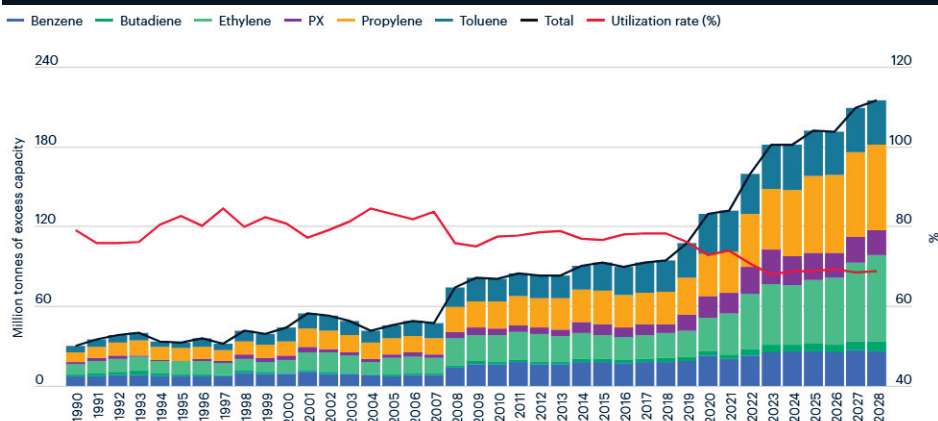
pecially on routes from China to the US and Europe. Latest data from Xeneta shows a big spike in rates on all major routes out of China.

According to van Jarwaarde: "We see a shortage on certain routes – it has shifted from China to the US and now affects APAC (Asia Pacific) to EMEA routes and APAC to Latin America, respectively."

He also flagged the impact of falling oil prices in making customers more cautious about ordering, and on pricing trends. Since January



Global capacity exceeding demand in the six petrochemical building blocks

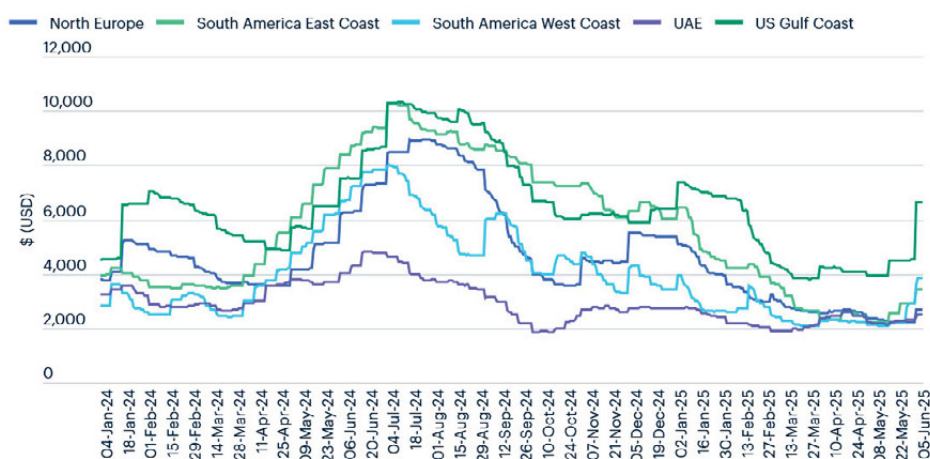


SOURCE: ICIS Supply & Demand Database

*Equivalent demand for the monomers, meaning demand for all their downstream derivatives

Shipping routes out of North China

40ft Dry Cargo weekly container freight rates (short contract type, terminal handling charges at both ports)



benchmark Brent has fallen from \$80/barrel to around \$65, driven by rising production by OPEC countries and stagnant demand growth.

Lower oil always puts downward pressure on chemical prices and changes downstream customer behavior as companies destock in anticipation of further declines in pricing.

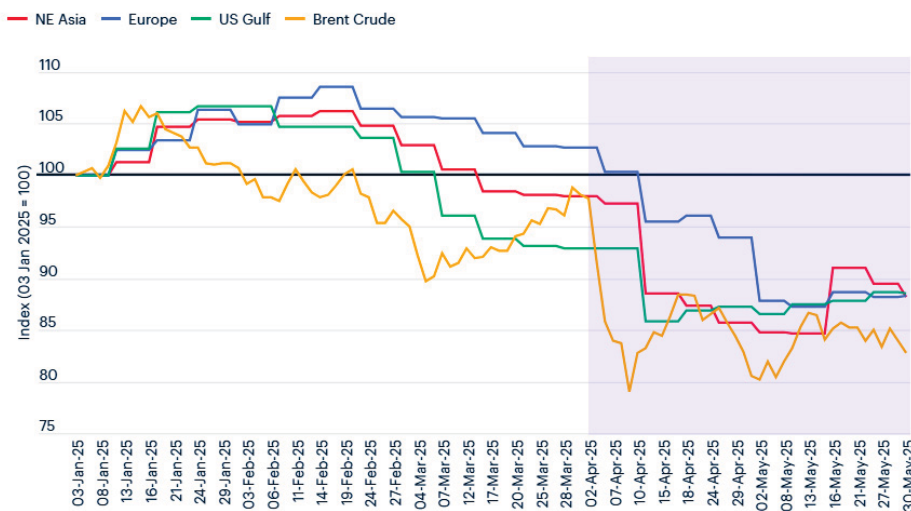
Van Jarwaarde describes how tariff and macro uncertainty plus falling prices are affecting consumers and businesses: "If you really look at consumer demand patterns, it's very visible in the US and not only in chemical demand, but affecting demand for many, many different industries. I think that people are just very cautious about building up stocks too early until they've seen that overall impact."

He also gave the example of Vietnam, which has been hit by a 46% tariff uplift by the US. The country's economy is heavily dependent on exports to the US and will be badly hurt by such a steep hike.

"A lot of the clothing that's going to the US is actually manufactured in Vietnam. So pretty much immediately when those tariffs were announced, we saw our customers holding back, holding back orders, just waiting to see how it all plays out."

Price indices in NE Asia, Europe and the US Gulf pre and post tariff announcement

Spot prices for 'building block' chemicals of benzene, butadiene, ethylene, methanol, propylene, toluene and xylenes used in index calculation for each region, alongside crude. Purple region signifies period after 'Liberation Day' announcement.



SOURCE: ICIS Analysis (updated till 30 May 2025)

NE Asia = CFR incoterm used for all chemicals, China location used for methanol

Europe = CIF incoterm used for benzene and ethylene, FD used for propylene, FOB used for butadiene, methanol, toluene and xylenes

US Gulf = CIF incoterm used for butadiene, DDP incoterm used for benzene, DEL incoterm used for ethylene and propylene, FOB used for methanol, toluene and xylenes

Brent Crude FOB UK/Norway Month Assessment spot value used

» However, Brenntag has seen some customers increasing their safety stocks in the first quarter, for example, from customers in consumer-facing markets like beauty and personal care.

Global oversupply impact

Forecasts from the ICIS Supply & Demand database show that global overcapacity in major building block chemicals, driven mainly by a capacity build in China, has been rising steadily. This year it will reach record levels and is unlikely to plateau until the end of the decade.

The global chemical industry is now in the midst of an unprecedented [wave of capacity closures and asset sales](#), especially of smaller, older facilities which suffer from uncompetitive production costs or are in areas particularly exposed to cheap imports.

This is particularly, but not exclusively, impacting Europe and parts of Asia outside China. In early June we have seen the sale by LyondellBasell of polymer plants in Europe, adding to a steady flow of corporate moves.

Van Jarwaarde said: "Global oversupply is clearly there, and we start to see the first players with the first announcements starting to tackle less competitive assets, particularly in Europe. Demand being where it is, which is at best fragile, is leading to oversupply in certain markets and in certain areas."

This redistribution of chemical production could, in fact, provide opportunities for distributors. If there is less energy-intensive production of building block products in Europe, more will need to be imported to supply downstream value chains.

For Brenntag, this means: "Doing what we do best: we run those supply chains, we keep a steady flow of products going, working with our supply partners to sustain their positions into those local markets. As production shifts out of EMEA and demand is still there, we're quite flexible on being able to source from various locations."

Brenntag Essentials is preparing for these dynamic global trends with what it calls a tri-



Ewout van Jarwaarde
CEO, Brenntag Essentials

"Sentiment is so important: it starts with consumer sentiment and how it translates in the purchasing patterns of our direct customers. And that feeds back into the production strategies of our suppliers"

ple strategy:

- Focus on last mile delivery with integrated sales, high levels of customer service
- Regional supply chain – aiming to leverage regional sourcing to move the products to demand centers
- Global sourcing through "toll gates" which are port facilities which ease access to international trade in chemicals

In 2023 Brenntag acquired Solventis Group, a glycols and solvents distributor which has tank facilities in the port of Antwerp, Belgium. Last year it bought Quimica Delta, a distributor in Mexico which has marine terminals.

These toll gates allow the company to tap into changing trade flows and deal with supply chain disruption more effectively.

"With the facilities we acquired with one of

our recent acquisitions – Solventis – we gained deep sea capacity, allowing us to bring full ships in from North America or from China into EMEA. Our regional supply chain networks in EMEA and our last mile service operations then facilitate distribution." Van Jarwaarde says Brenntag in North America should be reasonably insulated from the direct impact of tariffs because the region is a net exporter of chemicals. The vast majority of Brenntag's North America product portfolio is sourced from within the region.

He adds: "Secondary and tertiary effects of the tariffs are more unclear. Look at what's happening in the automotive and construction industries. A lack of consumer confidence is translating into low purchasing manager confidence."

Tariff uncertainty saps confidence

The Chicago Business Barometer collapsed by 4.1 points to 40.5 in May, indicating a sharp contraction in US business activity. This brings the index to its lowest level since January. The index has now been below 50 for eighteen consecutive months. The decrease was driven by a fall in New Orders, Order Backlogs and Production.

"There is significant uncertainty, and we don't expect that these uncertainties will be over after this 90-day negotiation period between the US and China ends," says van Jarwaarde.

He adds: "Sentiment is so important: it starts with consumer sentiment and how it translates in the purchasing patterns of our direct customers. And that feeds back into the production strategies of our suppliers."

The CEO highlighted the solvents market, where China has become a more significant supplier to the global market in the past few years. "There are really significant shifts happening so we're working very closely with our partners, taking over supply chain activities such as tank facilities to get a better grasp on how we can service our customers in local markets."

Europe's challenges

Van Jarwaarde acknowledges the challenges facing Europe's petrochemical industry, especially the energy-intensive side.

He says: "We have aged assets and we have a structural feedstock disadvantage and energy situation which is making the cost of producing in Europe less competitive."

He believes rule-makers in Brussels could do a lot more to alleviate the extra pressure caused by the regulatory environment.

"We strongly encourage conversations at all levels, including the EU, about how we can bring back overall European competitiveness, whether in the petrochemical or specialty chemical industry."

One way for Europe chemicals to capitalize on its strengths is to take advantage of the re-



Permanent plant closure plans and other strategic moves linked to tough industry conditions in Europe since 2022

Global

Dow - Assets in Europe, Middle East, Asia and India are under review, with Europe asset portfolio assessment expanded in April 2025. Review to be completed by mid-2025

HB Fuller - To shut down one third of global plants and reduce the number of warehouses in North America

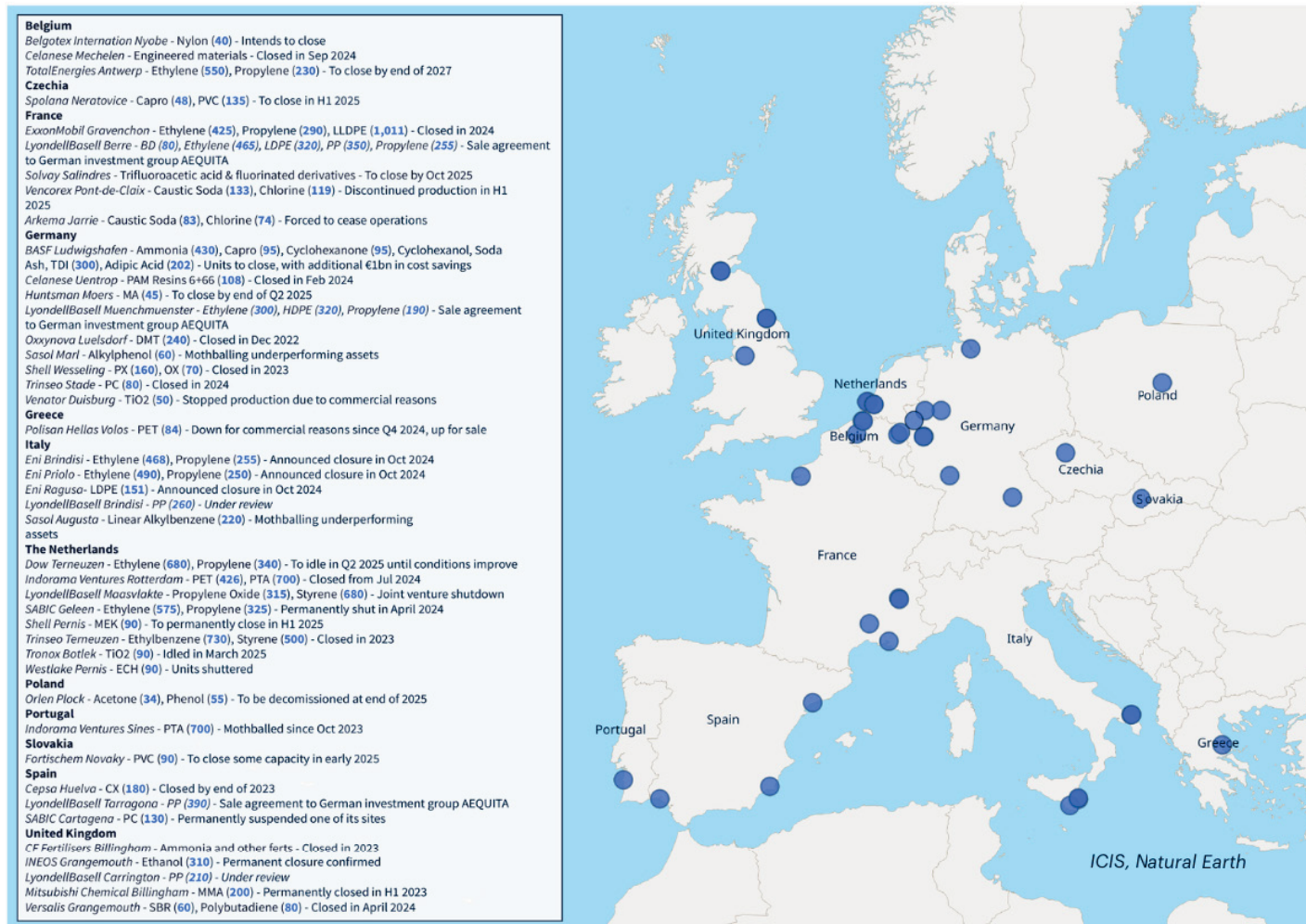
Indorama Ventures - 6 operating sites in "The West" under review for potential shutdown

INVISTA - To explore strategic alternatives for nylon fibers business

Shell - Looking to improve returns and cut capital spent on chemicals by 2030, through "high-grading" and closing select assets in Europe and potentially reducing its equity in US operations

*Capacities of plants in brackets next to product in '000 tonnes/year

Last updated on 05 June 2025



gion's leading position on renewable energy to lower the carbon footprint of its product portfolio. Also a focus on more downstream products where energy accounts for a much smaller proportion of total production costs.

Brenntag is following its suppliers down this route and last year announced a partnership with a caustic soda producer to shift a part of its portfolio to 'green' caustic soda

"There is significant uncertainty, and we don't expect that these uncertainties will be over after this 90-day negotiation period between the US and China ends"

based on renewables.

"Opportunities are very clearly there if we make use of our privileged access to renewable energy in Europe: Leveraging the strong position of sustainable energy, leveraging all the new technologies that are coming in different markets, whether it's in semiconductors or in the battery space, can bring great opportunities."

Long-term distribution drivers

Van Jarwaarde believes that in today's increasingly unstable world, chemical producers will rely more on distributors so that they can focus on navigating uncertainty.

"There's going to be a greater space for chemical distribution, but distribution will

shift from being a channel partner to much more of a holistic service partner across supply chains. Distributors like Brenntag will offer value-added services with deep, deep reach into those local markets," he said.

Digital and AI will play an increasingly important role in distribution, especially in improving the flow of data on carbon content between suppliers and customers. It should also improve the efficiency of supply chains.

As van Jarwaarde points out: "AI will be used between partners to optimize end-to-end supply chains across the different chemical value chains. By improving forecasting and supply chain planning the industry will shift from inventory on the shelf to a model of inventory in motion." ■

Better data is key to sustainability

Distributors such as Azelis are acquiring more deep and sophisticated data sets from suppliers so customers can make better judgements on product sustainability

Will Beacham Barcelona

Sustainability has been a key driver both of innovation and chemical industry growth strategies for years, but in a tough macroeconomic environment with margins under pressure, sustainability strategies must offer real value to customers through the effective use of data to measure environmental burden and benefit.

But what does sustainability actually mean? Defining this is the first and most important step for any chemical company as it can be interpreted in so many ways including sustainable profits and low environmental impact.

For Michael Heite, group sustainability director for Azelis, the world's seventh biggest chemical distributor according to the new ICIS Top 100 chemical distributors list, it has three aspects.

- Environment – climate change mitigation and adaptation, protecting the planet, consuming with less environmental impact
- Human rights, including inclusivity, fighting poverty, safe work conditions
- Sustainable profits – only a healthy businesses can be sustainable, profits enable business development and prosperity

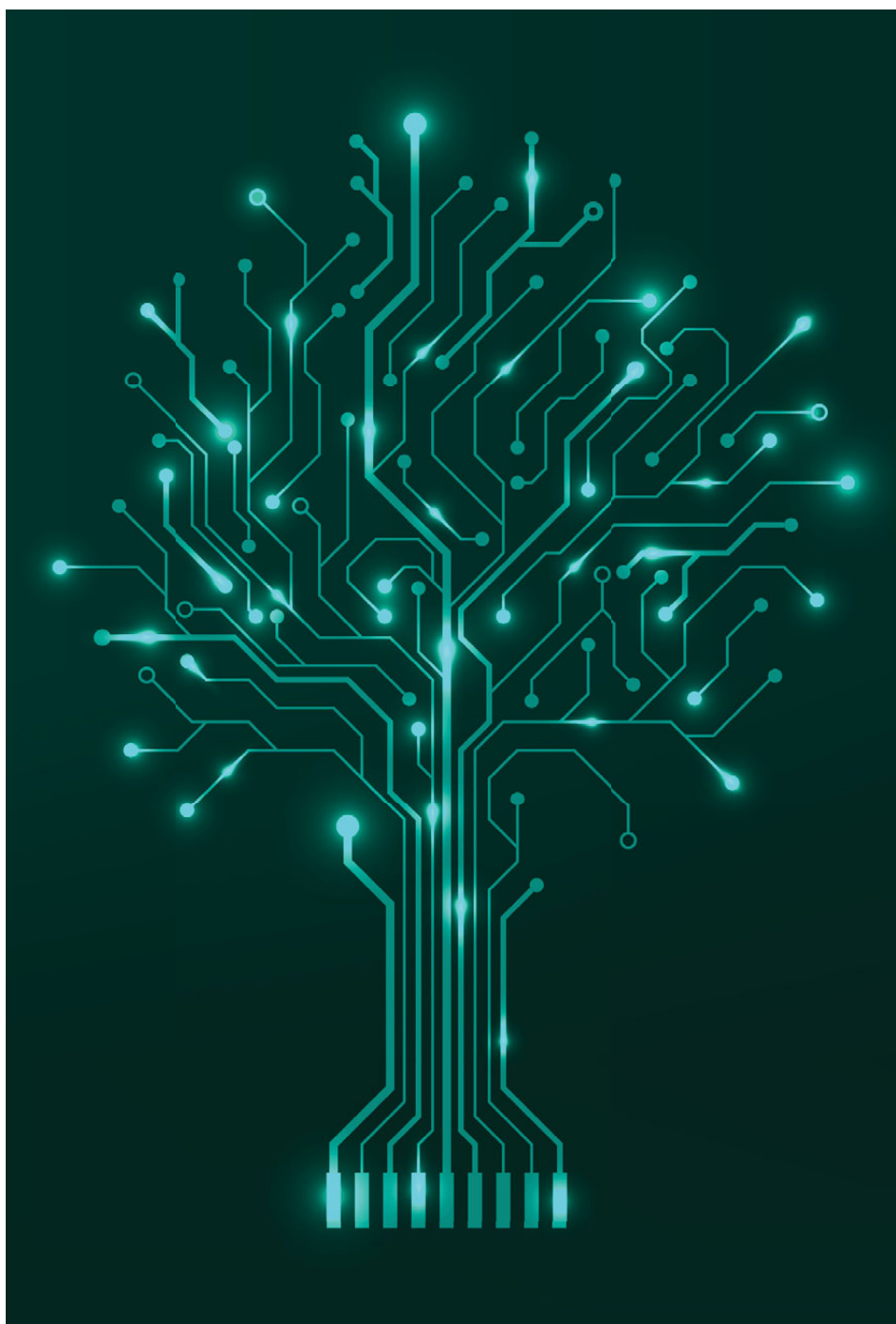
Chemical companies and distributors are all part of the same value chain with distributors located in a unique position sandwiched in the middle between suppliers and downstream customers. They have a unique opportunity to improve the environmental burden of entire supply chains through their procurement and selling strategies.

Heite points out that distributors like Azelis

Michael Heite

Azelis group sustainability director

“We rely a lot on what our suppliers provide us as data on product carbon footprints and it's super important that they all come from the same methodology and are calculated in the same way”



have an important role in providing transparency on environmental impact from upstream to downstream. Increasing amounts of data are now available on emissions and distributors are able to obtain detailed information on carbon content to customers. This allows them to make informed decisions about the products they buy while distributors can start discussions about applying a green premium.

Heite says: "It's super important and many discussions lack transparency on sustainability data. For us, it's of utmost importance that we are able to get carbon emissions data from upstream and can give them to downstream."

This also applies to product sustainability information that goes way beyond just carbon footprints to include a very strong product stewardship approach. For distributors there are a variety of sources of data for environmental burden which can help customers make informed decisions.

Unfortunately there are, as yet, no global standards such as apply to company financial accounts, so companies have to choose from a variety of sources. But in future information on sustainability will be of the same standard as financial information or volumes of materials is today.

According to Heite: "We rely a lot on what our suppliers provide us as data on product carbon footprints and it's super important that they all come from the same methodology and are calculated in the same way."

Azelis favors Together for Sustainability, a member-led initiative, which claims it is building a global standard for environmental, social and governance performance of chemical supply chains. This includes measurement of Scope 3 greenhouse gas emissions, which account for the majority of chemical industry carbon use.

"We really want to have suppliers that use Together for Sustainability standards for how to calculate the product carbon footprints for chemicals. It's also used in adjacent industries so that allows really comparable data in supply chains."

It's not just carbon footprint which informs customers about the sustainability of products, but other aspects of their performance and lifecycle.

"It's sustainability in a broader scope that we need to consider when we talk about the value coming from a product. It's also important to provide innovative chemistry to customers and overall efficacy is super important."

He points out that a product may not be preferable if it has a low carbon footprint but also a longer processing time or shorter lifetime. To measure the impact a complete life cycle analysis of a product in an application is required.

Azelis also wants its suppliers to share its values and ambitions to reduce emissions along supply chains.



Michael Heite
Azelis group sustainability director

"We will not see energy-intensity moving away because we cannot ignore the laws of nature in chemistry – renewable energy is one of the key elements that will reduce the input of fossil energy into chemistry"

Distributors are in the fortunate position of having contact with hundreds or even thousands of downstream customers who can provide valuable feedback to chemical producers. This could include market conditions but also information on innovation or how products are used and disposed of or recycled.

Heite says: "Customers are creating very valuable insights that we can give back to our upstream value chain so that they can accelerate and tailor their innovation towards what's really needed in the market."

Cutting Scope 3 emissions

With data on carbon content becoming increasingly reliable, chemical producers now have an added incentive to find innovative ways to cut emissions, with Scope 3 being the biggest area to tackle.

Increasing the use of renewable energy will be one of the most effective way to do this. Last year's winner of the ICIS Innovation Awards is a great example – the world's first large-scale electrically-heated steam cracker furnace by BASF, SABIC and Linde.

"I think the whole industry is harvesting more renewable energy and moving away from fossil fuels. In the long term, we will also need to shift towards a fully renewable raw material space."

He adds: "We will not see energy-intensity moving away because we cannot ignore the laws of nature in chemistry – renewable energy is one of the key elements that will reduce the input of fossil energy into chemistry. The second element is transformation of the carbon content in the molecules from being fossil-based.

He points out that the chemical industry has developed into today's highly sophisticated form over the last 100-150 years. But the next transformation needs to happen very quickly.

"Normal chemical plants are built for, let's say, 25 years of operation so that means today's manufacturing networks have seen six large rounds of funding, generating profits and bringing back the money. And now with the Paris Agreement and the need to go for net zero by 2050, we need to reduce these six cycles into one step."

A vast amount of funding will be needed for rapid scale up of electrification and renewable or recycled raw materials.

Heite is confident that the first steps on this transformative journey are being taken with initiatives such as the electric cracker furnace. There is also increasing use of renewable-based chemical raw materials.

"It's not a huge effect [yet], it's more of a wave which is moving towards us – it will reach us in let's say 2-3 years at scale. That's my expectation – nowadays we see the effects of efficiency increases in manufacturing and switches to renewable energy in the grids of the countries where our principles and suppliers are working."

Climate targets under pressure

Many fossil fuel companies and some chemical companies have abandoned or watered down their climate targets. In the aftermath of Russia's war in Ukraine security of supply has trumped saving the planet, supported by pressure from the new US administration.

In this environment, how can chemical companies make the investments that they need to ensure they are more sustainable when they have to focus more on survival in this really tough macroeconomic environment?

Heite believes the imperative to be more sustainable will overcome short-term pressures caused by the economy and politics.

"If you look at the whole chemical industry there are challenges due to energy prices in some areas of the world but chemical companies understand that sustainability is their future and are eager to provide solutions into that. Political tensions might slow certain regions for a while, but overall this is something that will not stop."

Azelis is sticking to the targets laid out in its Impact 2030 program, published in January 2025.

"We have decided we will not step back from that – sustainability is here to stay and we are committed to drive our program forward, to contribute to the reduction of emissions, and to changing our portfolio. The market is giving us the pace and we see more and more signals downstream from cosmetics and adjacent industries that a shift to renewable to bio-based is already expected." ■

Univar highlights in-region sourcing

CEO of Global Ingredients + Specialties Nick Powell aims to help customers overcome tariff disruptions, highlights capabilities in six key focus industries

Joseph Chang New York

US-based chemical distributor Univar Solutions is helping customers deal with tariffs with its strong in-region sourcing network and is positioning for long-term growth with its focus on six key sectors.

"Tariffs have become the number one topic. Nobody seems to have an answer of where this is headed or what's coming next, and so we're having to deal with the here and now, and sometimes the here and now can be very different by the time you think you've got a plan," said Nick Powell, CEO of Global I+S at Univar Solutions.

"We're very fortunate in that greater than 90% of our products are sourced within re-

gion – not just in the US but Latin America, Asia and EMEA. We're not importing a huge amount of products, so there's not a massive financial penalty from tariffs," said Powell.

Where the distributor is impacted by tariffs, it is passing costs along to customers as are its competitors, he said.

However, Univar is able to offer customers local buying options that can replace imported products, the executive noted.

"The fact that we have a high level of our product portfolio sourced in-region allows us to offer them offsets for those imported products. We're getting a lot of interest from customers and are generating new relationships and new business that way," said Powell.

After the COVID pandemic in 2020 and other events that led to supply disruptions,

there was a shift in customer mindset of wanting to onshore sourcing of chemical raw materials and intermediates, he explained.

"I'm not so sure that many actually took a huge amount of action around that, but I think what's happening [now] is those thoughts are resonating in their minds, and forcing them into action," said Powell.

"I think they realize there's a structural change in the way economies are trading with each other, structural changes in trade flows, import duties and taxation. And for them to be competitive, they absolutely have to drive change now," he added.

"We are seeing a change in behavior. The fact that we're 90%-plus regionally sourced means that we have something to offer. It's opening up a lot of new dialogue for us," said Powell.

Certainty of supply

"It's not just about cost but certainty of supply," he added.

"If you're buying a product from Asia, you may be able to suck up the import duty disparity, but how certain can you be of continuity of supply? So both those factors are playing into customers' minds right now," said Powell.

Univar is uniquely positioned to help customers in these aspects, not only because of a high level of in-region supply, but also particularly in North America because of its large infrastructure footprint which allows the company to provide reliable delivery and service, he pointed out.

Impact on consumer confidence

While US tariffs are not having a direct negative impact on Univar's business, they are causing a great deal of uncertainty among consumers of end-products and the companies that make those end-products, ultimately resulting in lower demand, he pointed out.

"We're certainly in a market that is impacted by lack of consumer confidence right now. We're seeing some change in customer behavior. Customers are very much ordering





Univar

just-in-time and supply chains are empty," said Powell.

"They have no confidence or a lack of confidence in what their own end-consumer demand is going to be next month. So they're not buying raw materials until they have a greater insight into that," he added.

Change in trade flows

US tariffs are also leading to a change in trade flows and more intensified competition in Europe and Latin America, as Asian producers seek to sell more product to non-US outlets.

"It's producing a lot more competitive environments from both a volume and a pricing perspective. The European market is already in somewhat of a state of turmoil. It's not helping any of us in that space, whether you're a producer or a distributor," said Powell.

Industry-focused strategy

Meanwhile, Univar Solutions has better positioned itself for growth and resilience with a sharper focus on key industries.

More than a decade earlier when the specialties business was underperforming, Univar undertook a major shift in strategy by setting up four focus industries – food ingredients, pharmaceuticals, coatings and beauty care – to run them as standalone business units, recalled Powell.

"Everybody in each of those business units, that's all they did – focus on those industries.

Prior to that, any seller, product manager or technical person may have served an oil refinery in the morning, and in the afternoon a food customer – no differentiation, no ability to sell our value," said Powell.

This new business model worked well in Europe where Powell led the changes, and was

then replicated in the Americas and Asia-Pacific but with different leadership for each region, he said.

Then Univar CEO David Jukes, who assumed the role in 2019, decided to globalize all of the distributor's businesses into six focus industries – each of them under a single leader, said Powell.



Nick Powell
 CEO, Global I+S, Univar

"We're certainly in a market that is impacted by lack of consumer confidence right now... Customers are very much ordering just-in-time and supply chains are empty"

Six focus industries

These six focus industries now fall under two segments. The I+S division now has three focus industries – CARE (beauty & personal care, homecare & industrial cleaning), Health & Nutrition (food ingredients, pharmaceutical ingredients) and Performance Materials (coatings, adhesives, sealants and elastomers (CASE), lubricants and metalworking).

The Chemical Distribution & Services (CD&S) division also has three focus industries – General Industrial, Refining & Chemical Processing, and Service Solutions.

Univar's online platform ChemPoint is its third division, focused on demand creation and multi-channel digital marketing campaigns for a wide range of chemicals and ingredients.

"In essence, we're able to adjust to the very specific needs of suppliers who are producing products that go into those spaces, or our customers who want to be treated differently, depending on their market," said Powell.

And in each of the focus businesses, Univar





» has specialists that can connect the value the supplier has in its product portfolio to the value it can generate for a customer, typically by helping solve a technical problem or producing a new product from its globalized network of laboratories that goes to market, he pointed out.

The strategy has been “extremely success-

ful” for Univar, allowing it to outperform its peers, he noted.

Globalization and customer wins

With the globalization of the focus industries, Univar is able to provide suppliers the same type and level of service in any region, adding local nuance when appropriate, said the executive.

“That gives them confidence that we can deliver for them. We found that suppliers have really liked that business model, and a number of them have been awarding us large pieces of new business in geographies where we’ve not dealt with them in those product portfolios,” said Powell.

In February 2025, Univar announced an expanded distribution partnership with BASF, securing the exclusive right to serve as a distributor of LuquaSorb Superabsorbent Polymers (SAPs) in the US and Canada in industrial applications.

In January 2025, Univar Solutions announced an exclusive distribution agreement for the US, Canada and Puerto Rico with dsm-firmenich, adding its skin actives and bioactive skin care ingredients including synthetic peptides, organically grown plant extracts and other natural ingredients.

Nick Powell
CEO, Global I+S, Univar

“We found that suppliers have really liked that business model, and a number of them have been awarding us large pieces of new business in geographies where we’ve not dealt with them in those product portfolios”

In November 2024, Univar announced a new exclusive distribution agreement with Syensqo to become, effective 1 January 2025, the sole distributor of its beauty care ingredients across the US and Canada.

“We are able to demonstrate to them that we have this large specialty and ingredients business inside the portfolio that’s staffed by technical people who are able to take their products to market and gain value for them,” said Powell.

“They were able to do that in conjunction with our solution centers (labs), helping customers solve problems or create new products to go and take more share in their marketplaces,” he added, calling the strategy a game changer of growth” for Univar. ■





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Tricon highlights ability to pivot fast

CEO Ignacio Torras sees the greatest value for chemical distributors being the ability to react quickly in the face of tariff volatility and other major disruptions

Joseph Chang New York

In an increasingly volatile and uncertain world with a constantly changing US tariff regime throwing fuel on the fire, agility to adjust and pivot is more important than ever for a global chemical distributor, said the CEO of US-based Tricon Energy.

"In the world of distribution and trading, one of the key elements has been the ability to predict – to know where the market is going to be able to take advantage of that trend. But today, the biggest value is not the ability to predict but the ability to react," said Ignacio Torras, CEO of Tricon Energy, in an interview with ICIS.

"We need to make sure that we can react very, very fast for whatever the market conditions are. We need to make sure we have the ability to pretty much sell in any part of the world," he added.

This requires logistics hubs, credit lines and pre-approved products between producers and consumers, he noted.

The ability to pivot quickly is especially critical with US tariff volatility which has featured many twists and turns – from escalation to de-escalation on tariff levels, negotiations and agreements, and exemptions to court rulings and appeals.

Consistent in inconsistency

"The only thing that is that is consistent about the tariffs is that that whatever you see in the morning might be totally different in the afternoon. One of the biggest concerns is precisely the unpredictability," said Torras.

"If there is a certain set of rules, even if they are unfair, you can start planning. The problem you have today is that you are navigating these huge aircraft carriers but with the need to be nimble and change direction like jet skis," he added.

Tricon has key relationships with US polyethylene (PE) and other polymers suppliers, as well as customers in China, for example, where suppliers need to export and customers need access to competitive volumes, he noted.

"While [tariffs] have caused headaches and some extra costs for transactions, it has also given us an opportunity to prove again our value proposition in terms of being able to move product for the supplier, and at the same time, make sure we don't leave our consumers without competitive product to manufacture their end goods," said Torras.

On 12 May, the US and China pulled back tariffs from extreme levels of over 100%, to 30% on China and 10% on the US, as negotiations continue for a 90-day period from that date.

US-China PE flows resume

US exports of PE to China have resumed but not at the same rate as before the new tariffs, he noted.

"It's amazing, the speed at which everything was shut down and the speed at which things are resuming. They're resuming, but not as before and in the context of a hand-to-mouth mentality," said Torras.

It is not easy for China to quickly shift PE

purchases to the Middle East because of different grades and specialty grades required. Such a shift would take time, he noted.

Tricon has been navigating these supply chain shifts well, but the whipsaw in US tariff policy is also hitting demand.

"The US-China PE trade has resumed but not at the same level we had before, for two reasons – one is the fear that a new tariff may come with short notice, and the second is market sentiment," said Torras.

"Tariffs are not helping with the recessionary conditions [in chemicals and plastics]. It is not adding confidence to the economy whatsoever," he added.

Demand hit from uncertainty

"The biggest issue we're having now – for example, in Mexico – is the slowdown. People are going from hand to mouth when it comes to purchases, because of the potential ramifications of both the cost of what they're buying, and also the [tariff consequences] of the finished goods they sell.

On 2 April – 'Liberation Day' – when the US announced much higher-than-expected reciprocal tariffs on most countries, it also exempted US-Mexico-Canada Agreement (USMCA) compliant goods from tariffs.

Compliance with USMCA requires that the Regional Value Content (RVC) of a good is at least 60% based on the transaction value method, or 50% based on the net cost method.

Global benzene dynamics

Tricon is also a big importer of benzene into the US of which the major sources have been regions targeted with tariffs. The top origin for US benzene imports is South Korea, which was hit with 25% reciprocal tariffs before they were rolled back to the baseline 10% on 9 April.

The second largest benzene supplier to the US is the EU, which the US most recently threatened with 50% tariffs to take effect 1 June, before pausing this to 9 July while negotiations take place.

"In most cases, we've been able to shift around products [between producers and consumers] at a rather rapid speed. But not



Ignacio Torras
CEO, Tricon Energy

"In the world of distribution and trading, one of the key elements has been the ability to predict... But today, the biggest value is not the ability to predict but the ability to react"



Tricon has a growing global presence in distribution, including in China

every product is easy to shift," said Torras.

"For example, there is not enough non-dutiable benzene in the world available to be imported into the US. So either the US will have to increase prices of benzene imports or somehow rebalance the consumption of benzene, [with benzene derivatives such as] phenol/acetone and styrene monomer produced elsewhere," he added.

The Middle East is a net importer of benzene, while India is exporting less material, he noted, leaving few options for additional imports if South Korea and the EU are taken out of the picture.

The US would be left with the options of increasing domestic prices or reducing consumption, he pointed out.

"If you increase the price of the raw material to everyone in the world, it can be OK, but if you have to export phenol/acetone or styrene with 25% more expensive benzene, that will be a huge issue," said Torras.

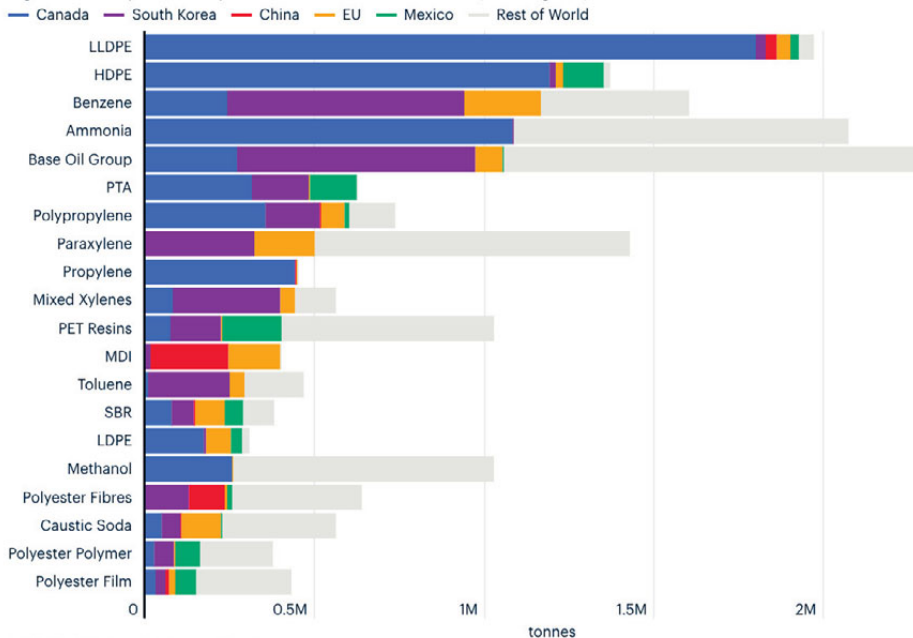
What's needed for a turnaround

Meanwhile, the global chemical industry is searching for any signs of a sustainable recovery after two and a half years of recessionary conditions. Key to a turnaround will be an upturn in housing and construction markets, and additional plant shutdowns.

"Demand has been hammered, especially in the construction sector which represents about 20% of demand for most chemicals, either because interest rates are too high, or because of too much supply as is the case with China," said Torras.

Top US imports

Figures for the top 20 most imported chemicals into the US in 2024 (excluding urea)



SOURCE: ICIS Supply & Demand Database

"So you have an oversupply of chemicals in general... and a reduction in demand. The situation has been quite bad going back to 2023. You add tariffs on top of that, and you're just putting gasoline on the fire," he added.

Tricon's price index of 10 commodities versus crude oil prices going back to 2005 shows that late 2023 through 2025 year-to-date was the worst stretch for spreads in the past 20 years.

"We need to have the confidence of the consumer to buy more, and for that we need the construction industry to rebound. Unfortunately, we also need to have some rationalization – shutdowns of plants," said Torras who added that geopolitical stability is also an important factor.

A turnaround does not appear to be in the cards for 2025 or 2026, he noted.

"Right now, there is no light at the end of the

» tunnel. When you're in the middle of a crisis, like we are now, you think there is no way out, but before you realize it [conditions start to improve and lead to a boom]," said Torras.

Europe continues to be particularly challenged. And with additional chemical plant shutdowns, the region is destined to become a larger import market.

"The mood is not very optimistic in Europe... The ratio between naphtha and natural gas is making it very difficult for European producers to continue," said Torras.

The high cost to decarbonize assets has also been a factor in closure decisions, he noted.

"We believe that every day, Europe will become a bigger and bigger import market than what it is today, and the opportunity for a company like ours is going to be greater," said Torras.

Record year for Tricon

Meanwhile, Tricon Energy is coming off its best year in terms of volumes. In 2024, volumes rose from 16 million tonnes, to over 20 million tonnes, and Torras expects further growth in 2025.

"Despite prices, the recession [in chemicals] and tariffs and volatility, we continue to grow volumes and provide even more options for consumers and suppliers," said Torras.

The US and the Middle East are major regions for Tricon when it comes to suppliers, along with China, while distribution to consumers is worldwide, he noted.

"Volatility tends to be friendly for distribution and trading, particularly up volatility, but unpredictability not, recession not. When producers and consumers are not making money, we cannot make money," said Torras.

"Volatility and supply chain disruptions open



Tricon CEO sees culture as the company's most valuable asset

certain opportunities... but we say in Spain this is food for today, hunger for tomorrow (pan para hoy, hambre para mañana), because you have a window of opportunity and then a huge recession in the market," he added.

Volatility is becoming more prevalent, not only with tariffs and political shifts, but wars and weather events (hurricanes, winter storms). More mega plants and complexes are also a source of volatility when these go offline, taking massive volumes off the market, he pointed out.

M&A strategy

Tricon is ready to make acquisitions if the right opportunity comes along but "loves organic growth" as "our biggest asset is our culture," said Torras.

In March 2025, Tricon entered the Africa

market by agreeing to buy a 25% stake in West African International Proprietary Ltd (WAG), part of the enX Group of Companies. WAG, headquartered in Durban, South Africa, is a distributor of polymers, rubber, fillers, and specialty chemicals.

In August 2024, it acquired eXsource, a specialty polymers distribution business based in Australia and New Zealand, from PE and polymers producer Qenos.

And in December 2023, Tricon picked up two Mexico-based companies – chemicals distributor Polymat and logistics service provider Q-Logistics – enabling it to better service the local market as well as those across the Americas.

Plastics momentum moderates

Meanwhile, demand for recycled plastics is growing, but at a slower pace because of the wide gap between virgin and recycled prices.

"We think the biggest change in circularity will come through a cultural shift. We need to make sure consumers are educated in [disposing of] waste, but at the same time need to find a financial proposition to make sure it is sustainable," said Torras.

"The market is not paying more for Coca-Cola because it comes in a recycled PET bottle. So how do you justify this when certain recycled products are more expensive?," he added.

Tricon is developing a Sustainable Products portfolio which includes circular, renewable and low carbon plastics.

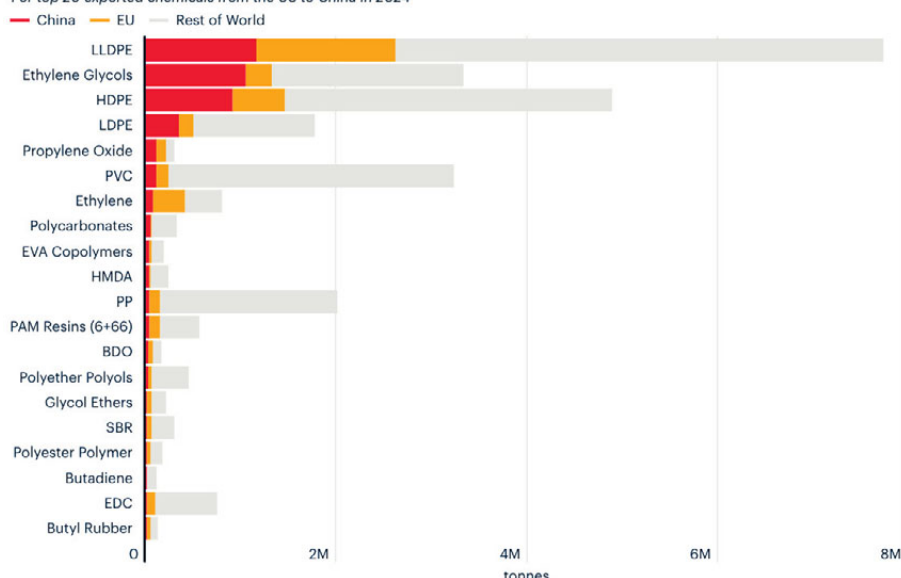
"The demand for recycled plastics is stronger than ever. The problem is when the virgin is [so much cheaper], it's hard to bring recycled product to market. That has been a challenge," said Torras.

"The recycled agenda is 100% moving but not at the speed we had in 2022 and 2023," he added.

Infographics by Yashas Mudumbai

Top US chemicals exports to China and the EU in 2024

For top 20 exported chemicals from the US to China in 2024



SOURCE: ICIS Supply & Demand Database (excluding naphthas, kerosenes and urea)

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 27 – 30th October 2025

 9:00 AM New York / 1:00 PM London / 5:00 PM Dubai

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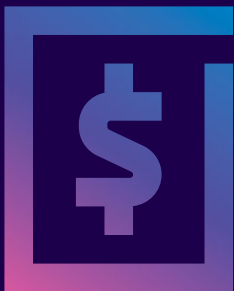
We add value

Our comprehensive solutions add value at every step of the supply chain – from purchasing to storage to delivery, from formulating, to blending to application knowhow.



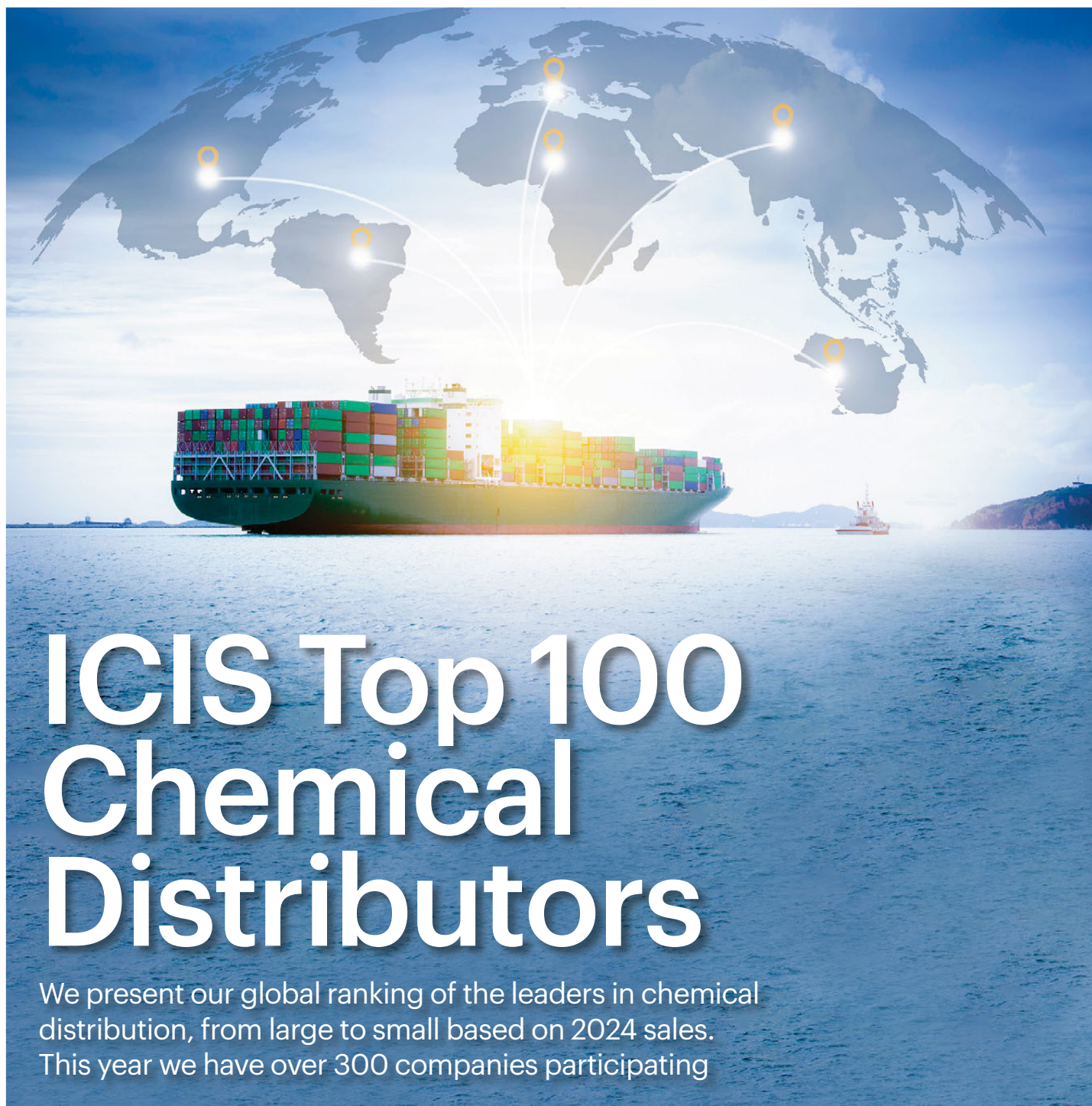
We reduce complexity

As a reliable partner, we provide the knowledge and experience necessary to respond flexibly to all market demands.



We improve efficiency

Based on our value-adding long-term partnerships, we improve (cost) efficiency along the supply chain.



ICIS Top 100 Chemical Distributors

We present our global ranking of the leaders in chemical distribution, from large to small based on 2024 sales. This year we have over 300 companies participating

Joseph Chang New York
Will Beacham Barcelona

1

BRENNTAG

2024 SALES: \$16.81BN (€16.24BN)

Essen, Germany

www.brenntag.com

CEO: Christian Kohlpaintner

Products: Comprehensive range of more than 10,000 products; industrial chemicals; specialty chemicals; ingredients; 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; specific application technology; extensive technical support; value-added services; product blending and mixing; formulation; regulatory advice; repackaging; inventory management; drum return handling

Assets: 600 locations in over 70 countries; workforce of more than 18,100 employees

2

TRICON ENERGY

2024 SALES: \$13.08BN

Houston, Texas, US

www.triconenergy.com

President and CEO: Ignacio Torras

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

Services: Marketing; re-export financing; shipping; logistics; packaging; blending; storage; just-in-time delivery; repackaging; inventory management; risk management for commodity price and foreign exchange

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America**



1.4
Billion
Net Sales
2024



33
Markets



58
Innovation
Centers



Over
1,720
Employees



Over
100
Regulatory
Specialists



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**DKSH Ranks Among the
Top 5% of the Companies
Rated by EcoVadis.**



DKSH

Delivering Growth - in Asia and Beyond.

Assets: Global presence with sales into over 120 countries; 28 offices; more than 850 employees

3

UNIVAR SOLUTIONS

2024 SALES: \$11.48BN

Downers Grove, Illinois, US

www.univarsolutions.com

President and CEO: David Jukes

Products: Acids; additives and modifiers; chelants; enzymes and microbes; essential chemicals and ingredients; oleochemicals; oxides; peroxides; polymers and resins; process aids; silicates; surfactants; sodium (salts)
Services: Blending; bulk breakdown; import/export; private label; technical support; solution centers; corporate accounts; custom blending; Chempoint; custom packaging and private label services; lab and formulation services; infinite sustainable solutions; chemcare services; telemetry services

Assets: Located in 32 countries and delivering to more than 100,000 customer locations across 120 countries from over 1,800 suppliers with over 600 distribution facilities across the world; 4,900 tractors, trailers and tankers providing flexible inventory and delivery alternatives; over 2,500 railcars; 120 rail and barge terminals; 20 deep sea terminals

4

NAGASE & CO

2024 SALES: \$5.72BN (¥900.15BN)

Chiyoda-ku, Tokyo, Japan

www.nagase.co.jp/english

Representative Director and President: Hiroyuki Ueshima

Products: Chemicals; plastics; electronics materials; cosmetics; health foods

Services: Import/export and domestic sales

5

IMCD

2024 SALES: \$4.99BN (€4.82BN)

Rotterdam, Netherlands

www.imcdgroup.com

CEO: Marcus Jordan

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

Services: Formulation of specialty chemicals and ingredients; technical and regulatory support; market and trend expertise; local and central stock holding; drumming; repackaging; blending; sampling

Assets: 80+ market-focused application laboratories; 5,100+ employees; 120+ offices and 140+ warehouses across EMEA, Americas and Asia Pacific

6

SUNRISE GROUP

2024 SALES: \$4.5BN

Ningbo, China



www.sunrisechemical.com

Chairman: Sun Yang

Products: Adhesives; active pharmaceutical ingredients and intermediates; paints and coatings chemicals; polymers and resins; polyurethanes; solvents; surfactants; aromatic hydrocarbons; polyester; polyolefins; engineering plastics; animal feed additives; veterinary and pesticide preparations; agrochemicals and intermediates; Chinese medicine

Services: Global sourcing and distribution; hazardous chemical storage; repackaging and labeling; digital logistics support; marketing and financing services; manufacturing and formulation; custom mixing and blending; milling and granulating; laboratory analysis and quality control; technical training and consultancy

Assets: Global distribution network in 43 countries with offices in China, UK and Japan; 3 plants and 2 labs with gross area of 189,000+ square meters; workforce of 700+ employees; self-developed customer portal; network of warehouses (owned and third-party)

Trading sales: 62%

7

AZELIS

2024 SALES: \$4.36BN (€4.21BN)

Antwerp, Belgium

www.azelis.com

CEO: Anna Bertona

Products: specialty chemicals and food ingredients for the following markets: food & nutrition; animal nutrition; personal care; home care & industrial cleaning; pharmaceuticals & healthcare; agriculture & environmental solutions; flavors & fragrances; case; electronics; essential & fine chemicals; lubricants & metal working fluids; advanced materials &

additives; textiles leather & paper.

Services: global innovation service provider; laboratory analysis and formulation development; expert technical and regulatory support; one-stop-shop; intelligent and tailored logistics solutions; market research and trend analysis; global sampling service; gmp and clean room pharmaceutical facilities; repackaging; flexible pack sizes; local stockholding

Assets: 70+ application and formulation labs worldwide; 4,300+ people; offices and access to warehouses across emea, americas and asia pacific; high quality and technically trained salesforce

8

KOLMAR GROUP

2024 SALES: \$4.24BN

Zug, Switzerland

kolmargroup.com

CEO and Chairwoman: Ruth Sandelowsky

Products: Alcohols; aromatics; renewable fuels; fiber intermediates; solvents; olefins

Services: Blending; storage; transportation

Assets: 2 biofuels plants

Trading sales: 79.7%

9

HELM

2024 SALES: \$3.88BN (€3.75BN)

Hamburg, Germany

www.helmag.com

CEO: Stephan Schnabel

Products: Acids and lyes; inorganics; intermediates; base chemicals; lithium compounds

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

Assets: More than 100 offices; participation in more than 30 countries



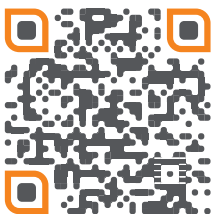
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10

SINOCHEM PLASTICS

2024 SALES: \$3.06BN

Beijing, China

www.sinochemplastics.com

General Manager: Guoxun Zhao

Products: ABS; AS; PS; PC; PMMA; PA6; PA66; PBT; PET; PPE; POM; ASA; MS; PC/ABS alloy; PPS; PSF; PES; PBAT; PLA; PBS; phenol; acetone; acrylonitrile; acetic acid; ethyl acetate; MMA; MTBE; BPA; propylene oxide; epichlorohydrin; paradichlorobenzene; polyether polyols; polyurethanes; MDI; TDI; epoxy resin; synthetic rubber; silicone emulsions; silicone coatings; plastic and rubber additives; aramid fiber; dyestuffs and pigments; fatty acids and alcohols; glycerine; pinene; myrcene; terpineol; caprylic/capric triglyceride; 1,2-hexanediol; 1,2-pentanediol; propylene glycol

Services: Marketing; diversified product solutions and value-added services for upstream and downstream customers at home and abroad; one-stop procurement; supply chain management; technical support; commissioned processing; brand maintenance

Assets: 3 warehouses; 2 office buildings

Trading sales: 40%

11

BARENTZ

2024 SALES: \$2.39BN (€2.31BN)

Hoofddorp, Netherlands

www.barentz.com

CEO: Derk Jan Terhorst

Products: Life science ingredients; performance materials in human nutrition, pharma-

ceuticals, nutraceuticals, personal care, animal nutrition, CASE and plastics, household care, industrial and institutional cleaning; specialty intermediates

Services: Global distribution; technical and formulation support; customized nutrition and taste systems/production; customized sourcing; dry/liquid blending; spray drying; microencapsulation; test-market support; local/regional/global warehousing; combined order management; e-harmonised sampling system

Assets: Operations in more than 70 countries with a strong presence in EMEA, Asia Pacific, North and Central America and South America; 39 specialized application laboratories; 2,800+ employees; Barentz Academy

Trading sales: 7%

12

CALDIC

2024 SALES: \$2.34BN (€2.26BN)

Rotterdam, Netherlands

www.caldic.com

Group CEO: Steven Terwindt

Products: Ingredients and specialty chemicals for food and nutrition; (bio)pharma; personal and health care; and industrial formulation markets such as coatings and construction, plastics and rubber, oil and gas, agricultural, environmental and automotive solutions

Services: Global distribution and supply chain solutions and services for the life and material sciences markets; manufacturing; dry and liquid mixing; filling; grinding; (re)packaging; labeling; technical formulation support; product

development; cGMP warehousing and cleanroom facilities for biopharmaceuticals; regulatory support; quality control

Assets: Application laboratories; mixing and blending facilities; repacking equipment; cleanroom and warehousing facilities in Asia Pacific, Europe, North America and Latin America; 3,750+ people working across 43 countries

13

PETROCHEM MIDDLE EAST

2024 SALES: \$2.26BN

Dubai, UAE

www.petrochemie.com

Founder and Chairman: Yogesh Mehta

Products: Glycols; esters; acetates; aromatics; monomers; methanol; aldehydes; ketones; polymers; specialties for paints and coatings; paraffins; acetic acid and chlorides

Services: Bulk chemical storage; tank leasing for storage; chemical blending and formulations

Assets: Large bulk chemical storage facilities in Jebel Ali, Dubai, Egypt and Saudi Arabia; drumming capabilities; loading bulk chemicals; iso tanks; stainless steel bulk storage tanks; chemical blending facilities

Trading sales: 34%

14

SNETOR

2024 SALES: \$2.1BN

Courbevoie, France

www.snetor.com

CEO: Emmanuel Aubourg

Products: Full range of products; PE, PP, PVC, PET, PS, ABS; engineering polymers; polyols;

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3600+
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720
Available Products



43
Countries Served



SUNRISE

Discover More:
sfcc@sfcc.com.cn
sunrisechemical.com





TDI; industrial chemicals; recycled and biodegradable materials

Services: Technical support

Assets: 110 warehouses

Trading sales: 75%

15

STAVIAN CHEMICAL

2024 SALES: \$2.09BN

Hanoi, Vietnam

stavianchem.com

Chairman and CEO: Dinh Duc Thang

Products: Plastic resins; recycled resins; biodegradable materials; fine chemicals; specialty chemicals; solvents; rubbers; sulfur; plasticizers; fertilizers; aromatics; caustic soda and acids; pulp and paper chemicals; metal-working chemicals

Services: Global distribution; international trading; logistics; import and export; supply chain solutions; packaging

Assets: 30 branches and representative offices worldwide; 10 manufacturing factories; 40 warehouses worldwide

Trading sales: 10%

16

JUNAN RESOURCES

2024 SALES: \$1.99BN

Ningbo, China

www.junanres.com

CEO: Wang Xinyu

Products: Acetic acid; methyl acetate; ethyl acetate; butyl acetate; secondary butyl acetate; n-butanol; isopropanol; styrene; butyl acrylate; methyl menthacrylate; vinyl acetate; acetone; methyl ethyl ketone; cyclohexanone; toluene; methyl tertiary butyl ether; acrylonitrile; nitric acid; aniline; benzene; polypropylene; polyethylene; ethylene glycol

Services: Import and export of chemicals; centralized procurement and distribution

Trading sales: 60%

17

DKSH PERFORMANCE MATERIALS

2024 SALES: \$1.6BN

Zurich, Switzerland

www.dksh.com/pm

CEO: Stefan P. Butz

Products: Food and beverage ingredients;

customized food blends; personal care and cosmetics ingredients; pharmaceutical ingredients; specialty chemicals; CASE; plastics; industrial and electronic chemical specialties; agricultural solutions

Services: Marketing and sales; logistics; innovation and formulation; regulatory services; sourcing; blending and repacking; after-sales; digital services

Assets: 58 innovation centers; 120 business locations; 3 blending and mixing facilities

18

OQEMA

2024 SALES: \$1.55BN (€1.5BN)

Liedberg, Germany

www.oqema.com

CEO: Patrick Barthels

Products: Full-line range of over 15,000 products across industries including CASE; personal care and home care; food and nutrition; pharma; water treatment; agriculture; F&F; chemical industry; lubricants; oil and gas; energy and electronics; surface technology; electroplating

Services: Customized supply chain solutions for both basic and specialty chemicals; application services; technical support; precision mixing, blending and formulation; warehousing and specialized warehousing (e.g. temperature-controlled facilities; the largest peroxide warehouse in the Benelux region); repacking; logistics solutions; recycling options; distinct entities focusing exclusively on service offerings.

Assets: Offices and own warehouses across 25 countries; own tank terminal in Ludwigshafen, Germany; recycling plant; service plants; fleet of own trucks; specialized laboratories; dedicated workforce of 1,600 employees across Europe

Trading sales: 10%

19

OMYA

2024 SALES: \$1.49BN (SWFR1.35BN)

Oftringen, Switzerland

www.omya.com

EVP – Sales, Marketing & Innovation: Thoralf Gliese

Products: Binders; high-performance polymers; TiO₂; organic pigments; dyes; minerals; additives and other specialty raw materials for inks, engineered materials, plastics, thermosets, plasters, mortars, concrete, packaging, board and paper, aluminum finishing; ingredients for food, nutraceuticals, pharmaceuticals, personal care, cosmetics, home care and animal nutrition; raw materials for agriculture and water treatment

Services: Global marketing and sourcing; global supply chain management (logistics, customer service); regulatory affairs; R&D; technical service; analytics; microscopy; quality control

Assets: R&D center for surface science, min-



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eral pigments, chemical engineering, microbiology and consumer goods; technical application services hubs in Europe, Americas and Asia Pacific for all product categories; sales affiliates in more than 50 countries; global network of 120+ warehouses

20 MANUCHAR

2024 SALES: \$1.48BN
Antwerp, Belgium

www.manuchar.com

CEO: Laurent Pasqualini

Products: Industrial chemicals and ingredients for home, fabric care, personal care, human and animal nutrition, mining and energy, crop nutrition, textiles and CASE; sodium sulphate and soda ash; chlor-alkali; acids; chlorides; oleochemicals; water-soluble fertilizers; food ingredients such as MSG, starches and sweeteners

Services: Tailor-made end-to-end supply chain solutions; maritime logistics for both breakbulk and FCL; local expertise and technical support in emerging markets; key account management; distribution platform that connects producers to end-users; local warehousing; dilution; blending; repacking; sieving; JIT deliveries; inventory management; financial solutions.

Assets: 90+ affiliates worldwide across 40+ countries; 180+ locations; 752,000+ square meters of warehouse space

Trading sales: 17%

21 VIDARA

2024 SALES: \$1.4BN (€1.35BN)
Luxembourg

www.vidara.com

Business Directors: Tomas Keisers, Daniel Diaz-Varela

Products: Chemicals and ingredients for coatings and inks; construction; PU foam; asphalt; care; pharma; animal nutrition; human nutrition; water treatment; polymers and elastomers; material science; flavors and fragrances

Services: Blending; storage; product development; reformulation; technical expertise; warehousing; logistics; repacking; laboratory services

Assets: Network of warehouses (owned and 3rd party); drumming, blending and laboratory facilities; feed premix plant; pressure vessel manufacturing plant; Reach registrations; IT systems and software

Trading sales: 2%

22 BIESTERFELD

2024 SALES: \$1.35BN
Hamburg, Germany

www.biesterfeld.com

CEO: Stephan Glander

Products: High-performance polymers; engineered polymers; thermoplastic elastomers; styrenic and acrylic polymers; standard polymers; synthetic rubbers; silicone and fluoro-silicone rubber compounds; carbon blacks; rubber additives and fillers; raw ma-

terials for personal care, cleaning, health-care, advanced intermediates, nutrition, nutraceuticals, nutracosmetics, textile and CASE, polyurethanes, adhesives, performance products, electronics, energy, composites, polymer additives; industrial chemicals; animal health; salts

Services: Technical expertise and consulting; joint innovation management; joint product and formulation development; active application development and product specification; customized logistical solutions; direct and warehouse distribution; LTL quantities; blending and storing; technical assistance; laboratory support; 3D-printing capabilities

Assets: More than 50 offices and sales regions serving customers in more than 120 countries; lab and innovation center; application laboratories; GDP and EN 9120 certification

23 QUIMIDROGA

2024 SALES: \$1.13BN (€1.09BN)
Barcelona, Spain

www.quimidroga.com

CEO: Vicente Munoz

Products: Solvents; monomers; glycols and intermediates; fine chemicals and specialties for food, feed, agrochemicals and fertilizers, pharma, cosmetics, F&F, detergents, coatings, adhesives, paper, water treatment, plasticizers; resins; plastics and elastomers

Services: Storage of liquid and packed prod-

ucts; blending; standard and tailor made packaging; dissolutions; AEO certification

Assets: Logistics complex at the port of Barcelona with capacity of 30,000 tonnes of packed products plus 155 tanks for 12,000 square meters of liquids; life science complex with 32,000 square meters area and 15,500 square meter warehouse; 20 loading docks and temperature controlled warehouse in the Barcelona area; 2 sites in Burgos and Madrid with capacity of 1,500 tonnes of packed products plus 20 tanks for liquids at each site; 9 distribution centers; fully equipped quality control laboratory and applications and development laboratory

Trading sales: 5%

24 TER GROUP 2024 SALES: \$1BN Hamburg, Germany

www.terchemicals.com

CEO and Managing Shareholder: Christian Westphal

Products: Portfolio of more than 5,000 Products: specialty chemicals for adhesives, rubber, plastics, coatings, construction, lubricants; ingredients for personal care, health care, food and animal nutrition

Services: Tailor-made distribution solutions;

product blending and mixing; packaging; formulation advice; laboratories; sampling; warehousing; logistics; technically trained sales force for dedicated industries

Assets: Global presence with 1,000+ employees in 48 subsidiaries

25 SAFIC-ALCAN 2024 SALES: \$982M Paris, France

www.safic-alcant.com

CEO: Yann Lissillour

Products: Wide range of specialty chemicals and materials; performance products for adhesives and sealants, coatings, inks and construction, plastics, rubber, polyurethanes, industrial specialties, detergency; ingredients for pharmaceuticals, cosmetics and personal care, health, wellness and nutrition

Services: Global sourcing; local sales; supply chain management and marketing support; dedicated technical, regulatory, quality support, formulation, blending and sampling

Assets: More than 175 years of experience; 38 offices covering 60 countries in EMEA, Americas and Asia; 12 application laboratories for cosmetics, coatings, rubber, pharmaceuticals and water treatment; combination of local warehouses and regional storage

26 PERTAMINA PETROCHEMICAL TRADING 2024 SALES: \$957M

Jakarta, Indonesia

[pertachem.com](https://www.pertachem.com)

President and Director: Oos Kosasih

Products: Polyethylene; polypropylene; polyethylene terephthalate; polyvinyl chloride; polystyrene; propylene; benzene; paraxylene; purified terephthalic acid; orthoxylene; heavy aromatics; decant oil; filler (masterbatch, calcium carbonate, sodium sulfate) and light naphtha

Services: Trading

Trading sales: 100%

27 MITSUBISHI SHOJI CHEMICAL 2024 SALES: \$945.4M (¥148.8BN) Tokyo, Japan

www.mccml.co.jp/en

President and CEO: Noriyuki Koga

Products: Sulfuric acid; toluene; xylene; styrene monomer; phenol; ethyl acetate; phthalic anhydride; butyl acrylate; silicone; acrylic resin; C9/C10 solvent; normal hexane; normal heptane; MDI; propylene oxide

Services: Chemical trading; stock sales

Assets: Storage tanks; trucks

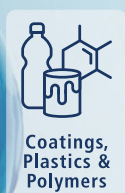
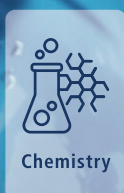
Trading sales: 20%

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28

HAWKINS

2024 SALES: \$939M

Roseville, Minnesota, US

www.hawkinsinc.com

President and CEO: Patrick Hawkins

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

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

Assets: Industrial manufacturing facilities (7); water treatment distribution warehouses (50); trucks (400); nutraceutical manufacturing plant (1)

Trading sales: 8%

29

BEHN MEYER GROUP

2024 SALES: \$910.8M (€880M)

Hamburg, Germany

www.behn-meyer.com

Products: Specialty additives and ingredients for fertilizers; crop protection; organic agriculture; food and beverages; animal nutrition and health; aquaculture; personal care and nutraceuticals; pharmaceuticals; home care; coatings and construction; leather and textiles; oil and gas; water treatment; rubber; latex and tires; plastics

Services: One-stop solution provider for specialty ingredients; global manufacturing and distribution with a focus on Southeast Asia; industry-specific technical sales and customer service; regulatory support and risk management; laboratory analysis; R&D; formulation development and blending; ingredient customization and packaging; intelligent warehousing and logistics; supply chain management; omnichannel support and business development

Assets: Over 1,300 employees; offices and warehouses in 13 key markets; global production facilities in Malaysia, Thailand, Indonesia, Italy, Netherlands and Australia; R&D facilities in Malaysia, Indonesia, Thailand, Vietnam, Italy, Netherlands and Australia

30

SOJITZ SOLVADIS

2024 SALES: \$910M

Dusseldorf / Frankfurt am Main, Germany

CEO: Eberhard Zorn

www.sojitz-solvadis.com

Products: Methanol; sulphur; sulphuric acid; petrochemicals; solvents; industrial chemicals; industrial minerals; cosmetic and pharmaceutical raw materials; synthetic lubricants; laboratory chemicals; fertilizers; packaging materials; personal protective equipment; polymers; rubbers; water treatment chemicals; battery materials

Services: Marketing; storage; tanks and pipelines; logistics; packaging; supply chain management; processing; tank terminaling; trans-



loading; re-manufacturing; sulphur forming (prilling); regeneration; investments in sustainable production; project development

Assets: Tank farms and storage facilities/warehouses; pipelines; production facility; worldwide subsidiaries within Sojitz Group

31

CJ SHAH GROUP

2024 SALES: \$900M

Mumbai, India

www.cjshahgroup.in

Managing Partner: Apurva Shah

Products: Aromatics; aldehydes; specialties; ketones; oxo alcohols; glycols; monomers; acrylates

Services: Import; storage; logistics; exports; drumming

Assets: Warehouse; tank farm; laboratories

Trading sales: 40%

32

HYDRITE CHEMICAL

2024 SALES: \$875M

Brookfield, Wisconsin, US

www.hydrite.com

President: Kevin Honkamp

Products: Extensive line of products; peracetic acid (PAA); chlor-alkali; industrial chemicals; foam control chemicals; food processing aids and plant sanitation chemicals; food ingredients; liquid sulfites; fertilizers and liquid micronutrients; pulp and paper chemicals; organic and inorganic chemicals; styrene/acrylic emulsion polymers; metal finishing chemicals; solvents; water and wastewater treatment chemicals and technology

Services: Contract manufacturing; formulation; custom blending; solvent reclamation and recycling; packaging and transloading;

technical training, service and support

Assets: 17 locations; bulk storage of 25 million gallons; private fleet of trucks and professional drivers.

33

REDOX

2024 SALES: \$808.2M

Sydney, Australia

www.redox.com

CEO and Managing Director: Raimond Coneliano

Products: More than 1,000 products serving all markets; commodity and specialty chemicals; food ingredients; agricultural chemicals; household and personal care chemicals; mining chemicals; surface coatings; plastics additives; greases and lubricants; water treatment chemicals; building and construction chemicals; pharmaceutical ingredients; animal feed ingredients

Services: Technical support; custom blending; dilutions; repackaging; bulk storage of powders, solvents, acids, alkalis; palletized storage

Assets: 17 regional sales offices; 3 manufacturing sites; 9 in-house operated warehouses; more than 100 stock locations

34

SHRIEVE CHEMICAL

2024 SALES: \$761M

The Woodlands, Texas, US

www.shrieve.com

CEO: George Fuller

Products: Full line of organic and inorganic industrial chemicals and specialty ingredients for CASE; personal care; food and beverage; water treatment; pharmaceuticals; chemical manufacturing; HI&I; energy; agriculture; lubricants; mining



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and home care**



**Food, pharma
and nutrition**



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Pulp and paper

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omya.com/en/global-distribution





Services: Custom blending; packaging; formulations; technical service; application development; R&D; global supply chain management; toll blending; warehousing; transportation; regulatory services; tank cleaning

Assets: Sales and administrative offices and laboratories in the US; China and UK; pilot plant in The Woodlands, Texas; 50 global stocking locations across the US, China and UK; railcar fleet

35

CELLMARK

2024 SALES: \$743.8M

Gothenburg, Sweden

www.cellmark.com

Presidents: Hugo Galletta, Ersin Alkan

Products: Pharmaceutical active ingredients; intermediates; excipients; ingredients for food/flavor/nutritional, personal care/cosmetics, beverage, oral care; oil and gas chemicals; semiconductor/electronic/solar chemicals; water treatment chemicals; ceramics; organic intermediates for synthesis; inorganics; building/construction chemicals; paints/coatings/polymers; wire/cable; flame retardants; industrial metals and light metals; renewable battery materials; specialty/fine chemicals; acetyls; acids; chlor-alkali; agrochemicals; lignosulfonates; petrochemicals; foundry chemicals; non-ferrous and ferrous materials; caustic soda;

hydrogen peroxide; agrochemicals

Services: Sales and marketing; sourcing; custom manufacturing; packaging; blending; milling and granulations; R&D; regulatory; market research; logistics; bulk dry storage

Assets: Production/laboratory facilities in US, Europe; warehouses in US, Europe, Asia; bulk storage in US, Europe, India

Trading sales: 51%

36

QUADRA CHEMICALS

2024 SALES: \$698.3M

Vaudreuil-Dorion, Quebec,

Canada

www.quadragroup.com

President and CEO: Anne Marie Infilise

Products: Chemicals for food and nutrition; chemical manufacturing; personal care; nutraceuticals and supplements; HI&I, cleaning and formulating; CASE and construction; pharmaceuticals; mining; oil and gas; formulated adhesives; pulp and paper; agriculture and animal feed

Services: Storage; packaging; blending

Assets: 7 locations (warehouses and tank farms)

37

SOLEVO

2024 SALES: \$680M

Geneva, Switzerland

www.solevogroup.com

CEO: Joris Coppys

Products: Tailored specialty chemicals and ingredients for life sciences (food and nutrition, personal care and hygiene, agriculture) and industrial applications (water treatment, CASE, packaging, mining and energy)

Services: Formulation and development; extensive range of digital services; tailor-made formulations; technical and application support; blending; laboratory services; customized logistics solutions

Assets: 1,100 employees; 60 distribution facilities in 11 African countries; applications laboratories; Solevo Academy

Trading sales: 2%

38

QUIMICA ANASTACIO

2024 SALES: \$677M

Sao Paulo, Brazil

www.anastacio.com

CEO: Jan Krueder

Products: Beauty and personal care ingredients; pharmaceutical ingredients; food and feed ingredients; flavors; agriculture chemicals; coating and construction chemicals; rubbers; household and industrial cleaning chemicals; lubricants and metal-working chemicals; polyurethanes; plastics; industrial oils

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

Assets: 13 distribution centers: 9 in Brazil, 2 in

Argentina and 2 in Mexico
Trading sales: 29%

39 MIDAS PHARMA
2024 SALES: \$672.8M (€650M)
Ingelheim, Germany

www.midas-pharma.com

COO and Managing Director: Dirk Weidenbach

Products: APIs; intermediates; chemicals; narcotics; peptides; finished dosage forms; medicinal products

Services: Custom Synthesis; GMP; biopharma analytics; reference products sourcing; pharmacovigilance; supply chain management; quality and safety and compliance; intellectual property services; solutions for biologics and combination products

Trading sales: 10%

40 MONTACHEM INTERNATIONAL
2024 SALES: \$600M

Fort Lauderdale, Florida, US

montachem.com

CEO: Jerry Murcia

Products: Polyethylene; polypropylene; PET; PVC; polystyrene; PCR;

Services: Global resin supply; logistics; financing; supply chain management; technical support

41 SHANGHAI SKYSEVEN CHEMICAL
2024 SALES: \$600M

Shanghai, China

www.skysevenchem.com

CEO: Li Jinxing

Products: Phenol; acetone; isopropyl alcohol; MMA; MIBK; MEK; VAM; ethyl acetate; methyl acetate; toluene; SM; cyclohexanone; acrylates

Services: Packaging in bulk, isotanks, drums
Trading sales: 30%

42 UNITED TRADING SYSTEM (UTS/ETC)
2024 SALES: \$587M

Saint Petersburg, Russia

www.utsrus.com

CEO: Andrey Shkola

Products: Paints and coatings chemicals; dry mixture and construction chemicals; plastics and polymer additives; rubber chemicals; resins and chemicals for composites; fibers; detergent chemicals; cosmetics and household chemicals; oil and oilfield, lubricants and refinery additives and chemicals; food additives; specialties; pharmaceutical raw materials; agricultural chemicals; mining chemicals; road construction chemicals; polyurethanes

Services: Storage and logistics; mixing/blending laboratories; tech support; developing certifications

Assets: 17 offices and 19 warehouses; 70,000 square meters of warehousing; 20,000 square meters office space; 11 laboratories

Trading sales: 100%

43 GADOT GROUP
2024 SALES: \$577.4M
Netanya, Israel

gadot.com

Group CEO: Opher Linchevski

Products: Solvents; lubricants; polymers; printing chemicals; fuels; oils; electronics; high-end chemicals; biochemical products; scientific equipment

Services: Storage and warehousing; marine logistics; land logistics; manufacturing; ecology services

Assets: Marine fleet of 15 vessels; 15 road tankers; 6 terminals; over 100,000 cubic me-

ters storage of classified and non-classified materials; over 10,000 cubic meters storage of bulk liquid

44 TOPNEXT INTERNATIONAL
2024 SALES: \$556.7M
Bangkok, Thailand

topnextinter.com

Managing Director: Nattapong Tumsaraj

Products: Hydrocarbon solvents – hexane, pentane, SBP group (rubber solvent), toluene, xylene, aromatic solvents (A100/A150), white spirits; chemical solvents – IPA, acetone, MEK, ethyl acetate, butyl acetate; 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; blending; transportation; multi-delivery mode offerings – vessel, bulk lorry, iso-tank, drum

Assets: 1 manufacturing plant of hydrocarbon solvents with capacity of 141,000 tonnes/year via subsidiary Sak Chaisidhi; 6 tank terminals in Asia; 73 chemical storage tanks with total capacity of over 46 million liters; 7 warehouses with total capacity of 38,000 drums (200 liters); 1 warehouse with capacity of 7,000 drums (Indonesia); loading and unloading facilities; drum filling station; laboratory (QC and technical); transport fleet of 54 bulk lorries and 45 pack trucks

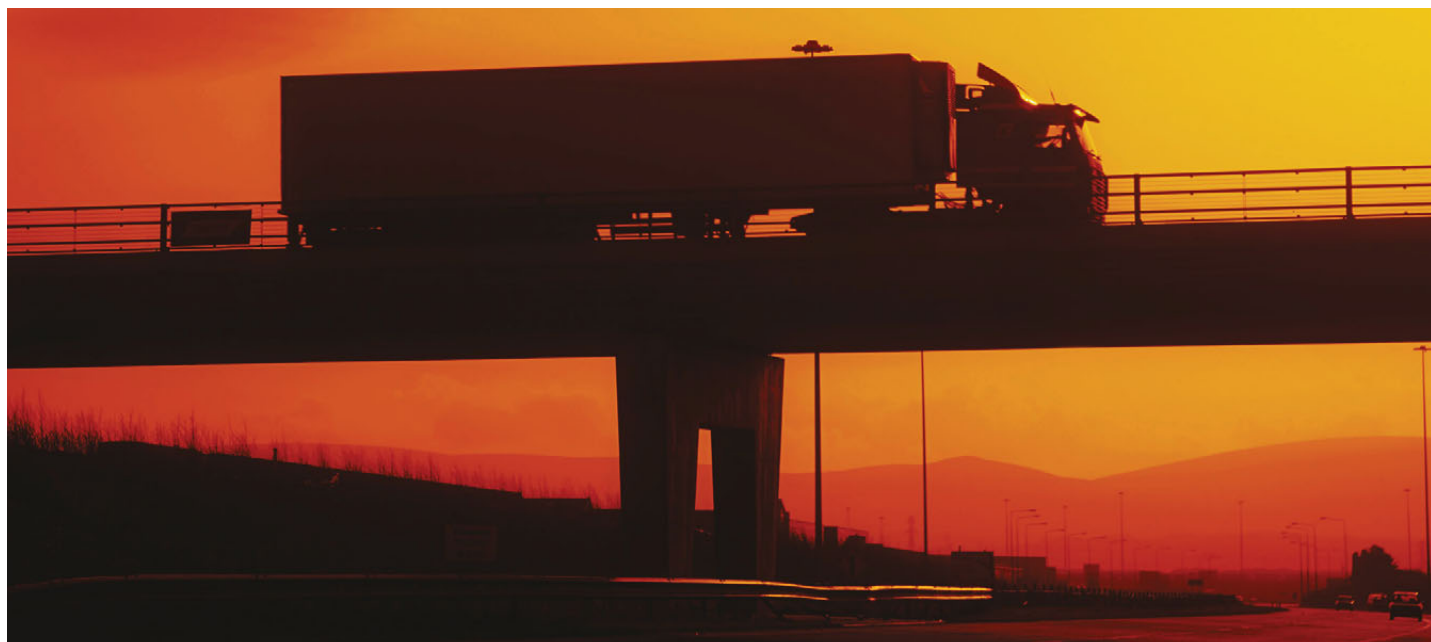
Trading sales: 8%

45 JEBSEN & JESSEN GROUP
2024 SALES: \$553.8M (€535M)
Singapore and Hamburg,

Germany

www.ingredients.jjsea.com

CEOs: Jebesen & Jessen Ingredients Asia – Lim





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Asia Pacific chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
1	Tricon Energy	4,914.2	40	Vidara	99.4	76	2M Group of Companies	8.1
2	Sunrise Group	4,483.3	41	Witcorp Products	97.5	77	BdV Behrens	7.2
3	Sinochem Plastics	3,002.1	42	Union Petrochemical	94.4	78	Jobachem	6.4
4	NAGASE & CO	2,259.9	43	Biesterfeld	92	79	Coreflow Chemi	6.1
5	Brenntag	2,251.2	44	Maha Chemicals	89	80	Univar Solutions	5.4
6	Junan Resources	1,987	45	REDA Chemicals	86	81	Plasmar	5.2
7	Stavian Chemical	1,726.7	46	Shrieve Chemical	77.5	82	Polystylex	5.2
8	IMCD	1,342.5	47	Transmare Chemie	76.8	83	KH Chemicals	5.2
9	Kolmar Group	1,169.7	48	NEO Chemical	71.7	84	Haeffner Group	5
10	Pertamina Petrochemical Trading	957	49	Prakash Chemicals Private Ltd	63.4	85	Barcelonesa Group	4.9
11	Mitsubishi Shoji Chemical	937.2	50	Continental Industries Group	55	86	Arkem Kimya	4.5
12	DKSH Performance Materials	930	51	Lehmann & Voss	40.4	87	Cornelius Group	4.3
13	Azelis	916.1	52	Bodo Moeller Chemie	36.2	88	Simagchem Asia	4
14	CJ Shah Group	900	53	Champion Specialty Chemicals	35	89	ECEM (European Chemical Marketing)	4
15	Behn Meyer Group	838.4	54	The Plaza Group	34	90	Servochem	3.5
16	HELM	781.5	55	Nordmann, Rassmann	31.1	91	Tilley Distribution	3.3
17	Redox	759	56	Telko	30.9	92	Hawkins	3.1
18	Shanghai Skyseven Chemical	594	57	Wego Chemical Group	27.9	93	Grolman Group	3.1
19	TOPNEXT International	554	58	Norkem Holdings	26.7	94	HARKE Group	3.1
20	Caldic	517.5	59	S. Kushalchand	25	95	Comercial Quimica Masso	2.8
21	KLJ Resources	501	60	Rinchem	25	96	El-Mohandes	2.7
22	Pon Pure Chemicals Group	465.7	61	United Trading System (UTS/ETC)	24	97	Taj Al Mulook	2.4
23	Omya	452.1	62	Novasol Chemicals Group	22.8	98	CEMP	2.1
24	Kempar Energy	450	63	Connect Chemicals	22	99	Arpadis Benelux	2.1
25	RSG Chemicals (Ramniklal S. Gosalia & Co)	384	64	OQEMA	20.7	100	Penpet Petrochemical Trading	2.1
26	Sanjay Chemicals India	345.5	65	Saiper Chemicals	20.5	101	Hubbard-Hall	2
27	Petrochem Middle East	264.5	66	United Chemical International	20	102	VTAR	2
28	WWRC Holding	235	67	An Loc Phat	17	103	Kemat	1.5
29	Jebsen & Jessen Group	228.7	68	The Leela Corp	16.8	104	BassTech International	1.4
30	Accord Chemical	205.7	69	Aug. Hedinger	14.7	105	Lake Chemicals and Minerals	1.3
31	Barentz	201.8	70	Multichem Specialities Private Limited	14.6	106	Bizinbiz Technologies (Elchemy)	1.2
32	Sri Balaha Chemicals	199.8	71	RAHN Group	14.1	107	Atlantic Chemicals Trading	1
33	KPL International	184.8	72	WISTEMA	12	108	Intermarc	1
34	Cellmark	159.8	73	Prakash Chemicals International	11.3	109	Will & Co	1
35	ECHEMI Group	147	74	Safic-Alcan	11	110	SIDG (Lavallee)	1
36	Manuchar	141	75	PHT International	8.2	111	Kempro Kimyasa Maddeler	1
37	Crescent Group (India)	132						
38	Polmann India Limited	114						
39	Ceyenar	106						

Note: Sales are in the specific region and may differ from total company sales. Sales \$1m and above are included

Siew Tin, Jebsen & Jessen KG – Fritz von der Schulenburg

Products: Coatings and resins; plastics and rubber; performance chemicals; animal feed and health ingredients; food and beverage ingredients; pharmaceutical ingredients; personal and home care chemicals; solvents; propylene; bioethanol; olefins; agro chemicals

Services: Sales and marketing; R&D; import/export; regulatory affairs; warehousing; sourcing; factory audit; credit report; local

currency financing; blending; storage

Assets: 14 offices worldwide; 1 warehouse; 5 laboratories; 3 regional innovation centers

Trading sales: 39%

46

REDA CHEMICALS

2024 SALES: \$544M

Dubai, UAE and Al Khobar, Saudi

Arabia

www.redachem.com

CEO: Abboud Smadi

Products: Specialty chemicals, ingredients and functional solutions for life sciences (personal and home care, pharmaceuticals, nutraceuticals, animal nutrition and biosecurity); coatings and construction chemicals; inks; food and beverage ingredients; advanced materials (plastics, cables, metal treatment); oil and gas chemicals; petrochemicals; mining chemicals; water treatment chemicals

Services: Industry-focused sales and marketing; educating markets; introducing new

technologies; customer-centric solutions; targeted product promotion and customer engagement; advanced technical support with application labs and blending facilities; custom formulations and prototype development; procurement and logistics; market intelligence; continuous sales support; commitment to sustainability and Responsible Care

Assets: Team of 500+ specialized sales professionals organized by business units to provide market-driven solutions; laboratories in 11+ countries and in-house blending facilities; 42 subsidiaries across 36 countries strategically focused on Asia, the Middle East and Africa; 70+ local and regional warehouses; 8 ISO certifications; GDP certification; Ecovadis Gold status

Trading sales: 5%

47 KLJ RESOURCES 2024 SALES: \$541.9M New Delhi, India www.kljindia.com

Managing Director: Hemant Jain

Products: Aromatics; amines; acids; acrylates; acetates/esters; alcohols/oxo alcohols; aliphatic solvents; anhydrides; base oils; caustic soda; chlorinated solvents and paraffins; dearomatized hydrocarbons; glycols/PG/PEG; isocyanates; ketones; LAB; monomers; paraffins/isoparaffins; polymers; polyols

Services: Agency business of petrochemi-

cal manufacturers across globe; dedicated storage tanks; supply chain operations; repacking and labeling; blending and distillation; market updates to customers; extended credit to customers; transparency with all service providers; sub-leasing of storage space; re-exports

Assets: 9 branches in India; 13 warehouses across India; drumming facilities in Kandla and Silvassa; dedicated workforce; leased storage tanks in ports such as Kandla, Mundra, Hazira, Pipavav, JNPT; Mumbai, Ennore, Vizag, Kakinada and Budge Budge

Trading sales: 30%

48 POLYSTYLEX 2024 SALES: \$539.3M (€521M) Riga, Latvia www.polystylex.com

CEO: Antons Viderkers

Products: Polycarbonate; polyamide; adhesives; MLLDPE; plastomers; ethylene copolymers; propylene copolymers; masterbatches and special additives; styrenic polymers and rubbers; ABS plastic; POM

Services: Logistics; financing; local presence; technical support and development

Assets: Local warehouses

Trading sales: 100%

49 NORDMANN, RASSMANN 2024 SALES: \$538.2M (€520M) Hamburg, Germany

www.nordmann.global

Managing Directors: Gerd Bergmann, Ulrich Cramer

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

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

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

Trading sales: 5%

50 CG GROUP/CG CHEMIKALIEN 2024 SALES: \$535.1M (€517M) Laatzen, Germany www.cg-group.de

Managing Directors: Mario Lobbus, Erik Bingen, Uwe Dusterloh

Products: Industrial and speciality chemicals; water chemistry chemicals; coatings and additives; surface technology products; health and nutrition: active pharmaceutical ingredients and food additives; cleaning in place solutions; process solutions; buffer solutions; pharmacopoeia tested raw materials and excipients

Services: Individual consulting; concepts and project management; procurement; analytics; quality management; contract manufacturing; cleanroom production grade C and D | AMG § 13; labeling and packaging; regulatory support; in-house logistics; individual logistic concepts

Assets: 8 subsidiaries/locations; 100 trucks; 7 locomotives; 114 tank wagons and iso containers; 15 certificates

51 CONTINENTAL INDUSTRIES GROUP 2024 SALES: \$525M New York, New York, US www.continental-industries.com

Chairman and CEO: Omer T. Karabey

Products: Polymers; industrial chemicals; sodium carbonate; fertilizers

Services: Sourcing; sales and marketing; financing; trading; shipping; logistics; warehousing; blending; project development; inventory and risk management of our entire portfolio

Assets: 11+ global offices; 80+ team members

Trading sales: 35%



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52

PON PURE CHEMICALS GROUP

2024 SALES: \$506.7M

Chennai, Tamilnadu, India

www.pure-chemical.com

Chairman and Managing Director: M. Pon-nuswami

Products: Acids and derivatives; aromatics; ketones; esters; ethers; chlorinated solvents; alcohols; aliphatic solvents; hydrocarbons; monomers; coatings and inks; plastics and composites; textile chemicals; leather and paper chemicals; sugar chemicals; water treatment chemicals; specialty lubricant additives; oilfield chemicals; lab chemicals; metal workings; hygiene products – cleaners and washes

Services: Re-packing; underground storage; technical servcel; custom blending; toll manufacturing; purification; safety training; online portal; just in time delivery; transportation

Assets: 28 branches in India and 5 manufacturing units; 5 in Dubai, Australia, Singapore, Bangladesh and Sri Lanka; 23 warehouses across India (inclusive of 7 class A petroleum solvent repack warehouse); leased terminal facility; 9 large warehouses for drumming

Trading sales: 5%

53

RAVAGO CHEMICALS

2024 SALES: \$502M

Orlando, Florida, US

na.ravagochemicals.com

President: James Duffy

Products: Acidulants; alkalis; citrates; emulsifiers; flavors; glycerine; glycols; phosphates; purified water; preservatives; surfactants; ac-

celerators; resins; oxides; silicas; polymers; rubbers; pigments

Services: Traditional and specialty distribution; inventory management; warehousing; liquid and dry blending; repacking; reformulation

Assets: 5 warehouses; 3 warehouse/repack/blending facilities; bulk off-loading; liquid tank trailers; various forklifts/related equipment; blending and repacking equipment

54

KEMPAR ENERGY

2024 SALES: \$500M

Singapore

www.kempar.com

Co-Founder and CEO: Nikunj Parekh

Products: Aromatics (benzene, toluene, xylenes); downstream chemicals (aniline, phenol, acetone, IPA, MIBK); gasoline blendstocks (MTBE, pygas, gasoline); other liquid petrochemicals/solvents

Services: Trading; chartering; logistics; warehousing; trade finance

Assets: Offices; warehouses; TC vessels

Trading sales: 60%

55

WEGO CHEMICAL GROUP

2024 SALES: \$479.6M

Great Neck, New York, US

www.wegochem.com

CEO: Bert Eshaghpour

Products: Food and nutrition ingredients; CASE and construction chemicals; oil and gas chemicals; industrial chemicals

Services: Multi-national chemical and ingredient distribution; sourcing/supply chain part-

ner to chemical users; export/distribution partner to chemical manufacturers; end-to-end supply chain management; product expertise; just-in-time delivery with 95% OTDI supplier-managed inventory

Assets: 160+ professionals across 15 countries; 10 branch offices globally; 50+ distribution centers across four continents

Trading sales: 20%

56

ECHEMI GROUP

2024 SALES: \$474.6M

Hong Kong, China

www.echemi.com

CEO: David Zhang

Products: Paints and coatings materials; fine chemicals; food and nutrition additives; pharmaceutical ingredients – APIs and intermediates; more than 2,000 self-operated products and 300,000 products from suppliers on platform

Services: Global chemical supply chain management; technical service; quality control; storage and logistics; full marketing support; digital solutions such as B2B ecommerce

Assets: 26 worldwide operating centers; nine warehouses; one factory; one quality control laboratory

Trading sales: 60%

57

LEHMANN & VOSS

2024 SALES: \$465.8M (€450M)

Hamburg, Germany

lehvoss.de

Managing Partner: Soenke Thomsen

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Products: Customized polymer materials; composite materials; masterbatches; plastic additives; rubber chemicals; functional fluids; raw materials for coatings; cosmetics; nutraceuticals; magnesia; rare earths; diatomaceous earth
Services: Sourcing; manufacturing; customizing; product development; logistics
Assets: Production sites in US, Europe, China; laboratories; warehouses
Trading sales: 30%

58 POCHTECA MATERIAS PRIMAS

2024 SALES: \$461.1M
Mexico City, Mexico

<https://pochteca.net>

CEO: Armando Santacruz

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

Services: Blending; packaging; storage and logistics solutions; environmental services and waste management; product application services; product development; quality control

Assets: More than 460,000 square meters of logistics capacity; capacity to store 22.8m litres of liquids and 137,000 square meters of storage of dry goods; 55 distribution centers – 33 in Mexico, 4 in Central America, 11 in South America, 6 in Brazil and 1 sales office in

US; fleet of more than 70 units; solvent recycling plant; 28 quality or product application laboratories.

59 EMCO CHEMICAL DISTRIBUTORS

2024 SALES: \$419M
Pleasant Prairie, Wisconsin, US

www.emcochem.com
President: Edward Polen

Products: Acids and alkalis; additives; aliphatic and aromatic hydrocarbons; amines; carbonates; chelating agents; ester and ether esters; ethanol and denatured ethanol; glycols; ketones; pigments; plasticizers; resins; rosins and isocyanates; silicones and silanes; surfactants

Services: Specialties and commodities distribution; blending and packaging; waste services; CASE and composites application laboratory services; hazardous goods warehousing; order fulfilment; USP and food grade packaging; private fleet delivery

Assets: 3 production facilities in the US – North Chicago, Illinois; Columbia, Illinois; Pleasant Prairie, Wisconsin; 6 warehouses in the US and Canada – Columbia, Illinois; North Chicago, Illinois; Pleasant Prairie, Wisconsin; Calgary, Alberta; Toronto, Ontario; Montreal, Quebec; applications lab; 47 tractors and 117 trailers

60 MCASSAB

2024 SALES: \$409.1M
Sao Paulo, Brazil

www.mcassab.com.br

CEO: Victor Cutait Neto

Products: Performance and specialty chemicals for polyurethanes, paints, resins, construction, polymers sectors; 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; inventory management; dilutions; technical application laboratories; full technical support; formulation; quality control laboratories; trade
Assets: 6 warehouses in Brazil; 4 warehouse in Argentina; 7 warehouses in Colombia; 1 warehouse in Paraguay; 3 premix facilities for animal nutrition; 1 premix facility for nutritional blends; 1 facility for polyurethane systems; 1 facility for fertilizers and adjuvants; laboratory

61 EIGENMANN & VERONELLI

2024 SALES: \$393.3M (€380M)
Pero, Milan, Italy

eigver.it

CEO: Gabriele Bonomi

Products: Specialty chemicals for coatings,

construction, rubber, plastics, pharmaceuticals, personal care, textiles, home care, lubes, food and nutraceuticals, ingredients.

Services: Application labs; marketing; toll manufacturing; logistics; storage and repacking

Assets: 3 production sites; R&D; QC and application labs

Trading sales: 5%

62 SOMOCHEM 2024 SALES: \$385.4M Dubai, UAE

www.somochem.com

Group CEO: Sunil Mohinani

Products: PE; PP; PS; PET; PVC; additives

Services: International trade and distribution via JIT model

Assets: Warehouses in Kenya, Tanzania, Uganda, Ghana, Nigeria, South and Southern Africa via direct/3PL

Trading sales: 60.8%

63 RSG CHEMICALS (RAMNIKAL S. GOSALIA & CO) 2024 SALES: \$385M

Mumbai, India

www.rsgchemicals.com

President: Hiren Gosalia

Products: Bulk solvents; aromatics; oxo alcohols; ketones; fiber intermediates; chloroalkali products; monomers; acetic acids and esters; methanol; DMF (di methyl formamide); n propanol; MPDIol glycol; polymers; polyethylene; polypropylene; PVC; ABS; metallocene; specialty elastomers and plastomers; specialty chemicals for CAS, pharma, agro, favors and fragrances

Services: Warehousing; liquid bulk tank storage; drumming; blending; testing; truck and tanker transportation

Assets: Warehouses; liquid bulk storage tanks; trucks; drumming facility

Trading sales: 60%

64 ARKEM KIMYA 2024 SALES: \$370M 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; bulk storage; blending; formulating; drumming; packaging; labeling; other warehousing services

Assets: Deep sea tank terminal at Gebze; Turkey with capacity of 110,000 cubic meters; logistics company; 75 transport units and 600 ISO tank containers; 4 warehouses (2 in Istanbul, 1 in Izmir, 1 in Rotterdam)

Trading sales: 3%

65 TILLEY DISTRIBUTION 2024 SALES: \$369.5M Middle River, Maryland, US

tilleydistribution.com

Co-CEO and CCO: Sean Tilley

Products: Food and pharma ingredients; flavor and fragrance ingredients; specialty chemicals; lubricants

Services: Global distribution; technical sales support; QC and R&D laboratories; bulk transloading; packaging; custom blending

Assets: Warehousing; rail terminals; blending tanks; white room packaging; QC and R&D laboratories; package and bulk delivery fleets

66 GRUPO RNM 2024 SALES: \$362.3M (€350M) Famalicao, Portugal

www.grupornm.pt

CEO: Ricardo Machado

Products: caustic soda; hydrogen peroxide; sulphuric acid; hydrochloric acid; sodium hypochloride; polymers (PE, PP, PVC, PS); solvents; surfactants; silicones; sulphonic acid; SLES; AdBlue; aluminium polichloride; iron chloride

Services: Storage of liquid and packaged products; blending; tailor made packaging; logistics and operations consulting

Assets: Logistics complex at Tarragona, Famalicao, Santo Tirso, Madrid, Valencia, Cartagena, Vigo, Lisboa with capacity of 80,000 tonnes for packed products and 8,000 cubic metres for liquids; 5 tank terminals for liquid bulk; own fleet with 115 trucks; 100 cisterns and 125 isotainers

Trading sales: 5%

67 CHEMGROUP 2024 SALES: \$352M Louisville, Kentucky, US

www.chemgroup.com

President and CEO: Martin J. Wehr

Products: Full line of commodity and specialty chemicals; organics and inorganics; acids; hydrogen peroxide; sodium hypochlorite; solvents; surfactants; amines; glycols and intermediates; water treatment chemicals; caustic soda; bleach; phosphate and nitrogen products; white oils; borates; lime and full line of gas to liquids (GTL) fluids and solvents

Services: Chemical and inventory management; tail-complexity spend management; technical service and total cost of ownership advisory; cost reduction program implementation; custom packaging; billing and warehousing

Assets: 14 super regional warehouses with over 700,000 square feet of hazmat storage; 54 tractors; 45 trailers; 35 tankers; 14 straight trucks

68 SANJAY CHEMICALS INDIA 2024 SALES: \$350.5M Mumbai, Maharashtra, India

www.sanjaychemindia.com

Chairman: Vijay Raj Parmar

Products: Solvents; basic chemicals; pharmaceuticals and intermediates; polymers; acrylates; aromatic solvents; oxo alcohols; acetates; alkali metal salts; acids; ethylene glycols; amines; ethers; carbonates; sulphates; ketones; phosphates; caustic soda; urea

Services: Wide product range; dedicated storage tanks; vendor questionnaire support from



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manufacturer; supply chain; repacking; labeling; market updates; extended credit; transparency with all service providers; exports

Assets: 5 branches in India; 1 overseas branch in Dubai; 20 warehouses across India (including 5 repack warehouses) totaling 40,000 square meters of storage space; leased terminal facilities at Kandla, Mundra, Mumbai, Hazira and JNPT; 125 employees; 11,000 square feet of owned office space

Trading sales: 3%

69

LBB SPECIALTIES

2024 SALES: \$345M

Norwalk, Connecticut, US

lbbspecialties.com

President and CEO: Thomas Van Valkenburgh

Products: Specialty chemicals and ingredients for personal care and cosmetics; home care; food and beverage; nutraceuticals; industrial specialties; CASE; water and metal treatment; plastics and composites; fragrance and flavors; industrial cleaning; life sciences; biologics; oligonucleotides; pharmaceuticals

Services: Distribution partner in the Americas: warehousing and inventory management; supply chain and logistics; technical and marketing support; market research and insights; regulatory and quality affairs support; formulation and application assistance

Assets: 40 stocking locations in North America; 3 managed DCS; 7 offices in North America; personal care formulation lab

70

TENNANTS DISTRIBUTION

2024 SALES: \$343.1M (£274M)

Manchester, UK

www.tennantsdistribution.com

Managing Director: Tim Griffiths

Products: Acids and alkalis; solvents; resins and performance chemicals; surfactants; food ingredients; water treatment chemicals; white oils and petroleum jellies; personal care ingredients; animal feed additives; AdBlue; pharmaceutical raw materials; fatty acids and glycerine

Services: Sales and marketing; warehousing and storage (including BRCGS, FEMAS and temperature controlled); repackaging; blending and dilution; formulating; relabeling; dissolving

Assets: 20 fully owned sites including warehousing and bulk tank storage; in-house vehicle fleet including road tankers

Trading sales: 2%

71

AQUACHEMIE

2024 SALES: \$340.4M (AED1.25BN)

Dubai, UAE

aquachemie.com

Managing Director: Anand Kumar Varadharajulu

Products: Upstream, midstream, downstream,



minning specialty chemicals; solvents; salts; corrosion inhibitors; deformers; biocides; antiscalant; drag reducers; esters; glycols; process and finished product additives; catalysts and adsorbents; alcohols; ethanolamines; ketones; hydrocarbons; plasticizers; other industrial and bulk chemicals

Services: Petrochemical storage; warehousing; blending; oilfield chemicals manufacturing; specialized on-site technical services; catalyst sulphiding; fuel additive changeover

Assets: Petrochemical terminal in Jafza; 13 manufacturing units in UAE/KSA/Qatar/Oman/India; corporate office in Dubai; regional head office in all GCC countries; product development and application lab in UAE/KSA

72

COMERCIAL QUIMICA MASSO

2024 SALES: \$336.4M (€325M)

Barcelona, Spain

www.cqmasso.com

President: Isidro Masso Torello

Products: Pharmaceutical ingredients; cosmetics and related products; agricultural chemicals; food ingredients; technical polymers; industrial colors; ceramics and construction materials; animal health and nutrition ingredients; home chemicals; garden and allotment products; environmental hygiene products; transport and energy additives; glass and environment materials; electronic chemicals; textile chemicals; paper chemicals

Services: Manufacturing; formulation; application laboratory services for personal care, pigments, food and textiles, microbiological laboratory services

Assets: 6 in-house logistics; manufacturing; R&D and application centers; more than 115,000 cubic meters of storage; commercial network with presence in 15 countries

73

INTERSTATE CHEMICAL

2024 SALES: \$323M

Hermitage, Pennsylvania, US

www.interstatechemical.com

President and CEO: C. Michael Puntureri

Products: Alcohols; ketones; solvents; glycols; catalysts; sodium and potassium methylate; plasticizers; resins; thermal fluids; caustic soda; acids

Services: Refining; manufacturing; packaging; custom blending; environmental services; transportation; quality control; tank rental services; warehousing

Assets: 7 warehouses; 1 refinery; 2 river terminals; 102 trucks; 170 tankers; 50m gal of storage capacity; quality control labs; 350 professionals

74

KRAHN CHEMIE

2024 SALES: \$316.4M (€305.7M)

Hamburg, Germany

www.krahn.eu

CEO: Martin John

Products: Coating ingredients (additives, rheology modifiers, pigments and colorants, resins, biocides, film consolidation agents); construction chemicals (additives, pigments, fillers, rheology modifiers); adhesives ingredients (resins, plasticizers, additives, bonding agents); cleaning and disinfection products; personal care ingredients; plastic ingredients (additives, plasticizers, flame retardants); rubber ingredients (synthetic rub-



ber, additives, adhesion promoters, mold release agents); lubricant ingredients (base oils, additives and packages); heat transfer fluids; fire suppression

Services: Technical sales and marketing support; application development; laboratory analysis; colorimetry and color matching; formulation advice; warehousing and logistics solutions; mixing and blending; repackaging; sampling; legislative and regulatory support; life cycle assessments

Assets: 5 technology centers

75 COLONIAL CHEMICALS

2024 SALES: \$315.4M
Savannah, Georgia, US

[colonialchemicals.com](https://www.colonialchemicals.com)

President: Rob Roberts IV

Products: Comprehensive product portfolio; acids; bases; surfactants; glycols; alcohols; inorganic compounds; general and specialty chemicals

Services: Global sourcing; local service; custom blending; packaging; warehousing; logistics; quality lab

Assets: Warehouses; bulk terminals; blend tanks; multimodal logistics; onsite services

76 DONAUCHEM

2024 SALES: \$314.7M (€304M)
Vienna, Austria

[donauchem.com](https://www.donauchem.com)

Member of the Board: Mathieu de Krassny

Products: Commodities and specialty chemi-

cals for food; pharmaceuticals; paints and construction; cosmetics and detergents; metal; printing; water treatment; customer specific compositions

Services: Mixing; blending; environmentally friendly consultancy; training sessions on safety and law; waste disposal; consultancy on chemical law and REACH

Assets: 13 warehouses in Austria, Poland, Czech Republic, Slovakia, Hungary, Romania, Serbia

Trading sales: 59%

77 HB CHEMICAL

2024 SALES: \$301.5M
Twinsburg, Ohio, US

www.hbchemical.com

Vice President and General Manager: Joe Moran

Products: Accelerators; adhesives; antioxidants; carbon black; dispersions; fatty acids and amides; flame retardants; magnesium oxide; masterbatch; natural rubbers; pigments; plasticizers; resins; stearates; sulfur; synthetic polymers; waxes; zinc

Assets: Warehouses throughout North America; large inventory; outstanding customer service team

78 NORKEM HOLDINGS

2024 SALES: \$300.5M
Knutsford, UK

www.norkem.com

Group Managing Director: Alan Nicholson

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

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

Assets: 14 worldwide locations

79 SUPERIOR INDUSTRIAL SOLUTIONS

2024 SALES: \$300M

Indianapolis, Indiana, US

[relyonsuperior.com](https://www.relyonsuperior.com)

Chief Commercial Officer: Bryan Teed

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

Services: Solvent recycling; blending; custom manufacturing; private labeling; bulk and package delivery; acetone replacement systems; vendor managed inventory; regulatory consulting

Assets: 8 full service locations; 67 trucks; 170 trailers; 3.5m gal bulk storage; 76 blend tanks

80 LIKIT KIMYA

2024 SALES: \$297M
Istanbul, Turkey

www.likitkimya.com



Chairman: Ahmet Aksoy

Products: Caustic soda; acetic acid; KOH (potassium hydroxide); methanol (pure and denaturated); monoethylene glycol (MEG); diethylene glycol (DEG); phosphoric acid; vinyl acetate monomer (VAM); methylene chloride; butyl acrylate; 2 ethylhexanol; ethanol (pure and denaturated); sulphuric acid; formic acid; sodium lignosulfonate; calcium lignosulfonate

Services: Trading; denaturation; packaging; warehousing; port services; tank rental services

Assets: Warehouses; terminals; port; laboratories

81

QUINTIA

2024 SALES: \$285M

Argentina, Brazil, Colombia,

Peru

www.quintia.com

President: Diego Collard Bovy

Products: Mining chemicals; water treatment products; paper chemicals blends; oil and gas chemicals; industrial chemicals; feed additives; specialties and premixes; poultry pigments; animal health products; food ingredients and blends; flavors; plastic sacks and bags; human health and pharmaceutical products

Services: Packaging and storage; picking and bulk; blending and dilution; feed premixes; pigment production; animal vaccine production; flavor production; technical applica-

tion support; total chemical management programs; quality control

Assets: 13 warehouses in Latin America (Peru, Argentina, Colombia, Brazil, Chile, Mexico, Paraguay); 8 production facilities; 8 quality control labs; 5 product application labs

Trading sales: 2%

82

HSH CHEMIE

2024 SALES: \$284.2M (€274.6M)

Hamburg, Germany

www.hsh-chemie.com

Group Managing Directors: Stefan F. Rather, Stephan P. Lohden, Frank Raabe

Products: Specialty chemicals for coatings; adhesives and building; personal and home care; food, feed and pharma; plastics and rubber; industrial performance applications

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

Assets: 14 sales office locations in Central and Eastern Europe

Trading sales: 10%

83

BODO MOELLER CHEMIE

2024 SALES: \$271.2M (€262M)

Offenbach am Main, Germany

www.bm-chemie.com

CEO: Frank Haug

Products: Adhesives and sealants; silicones; resins; casting and potting resins for electronic components; semiconductors; generators; motors; batteries; composites; mold-making; resins and dispersions for CASE; additives for CASE; additives for plastics and rubber; additives for lubricants; pigments for CASE; plas-

tics and rubber; chemicals and dyes for textile; packaging and labeling adhesives; masterbatches for automotive interior; metal pretreatment and cleaners

Services: Technical consulting; engineering/FEM; application labs and show rooms for adhesives, coatings, textile chemistry and life science formulations; filling and packaging; blending and formulating; education and training (IFAM)

Assets: Headquarters in Germany; over 40 affiliates worldwide; more than 50 local warehouses; adhesive competence center and laboratory facilities in Poland, Spain, US, Mexico, China, India, Japan, Egypt, Dubai UAE, South Africa; 4 production plants for polymer formulations; cutting competence center

84

BARTON SOLVENTS

2024 SALES: \$269.5M

Des Moines, Iowa, US

www.barsol.com

President: David 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 blending; delivery to customer or job site; waste services; laboratory services

Assets: 7 stocking locations, 6 with rail access; 87 power units; 167 trailers

85

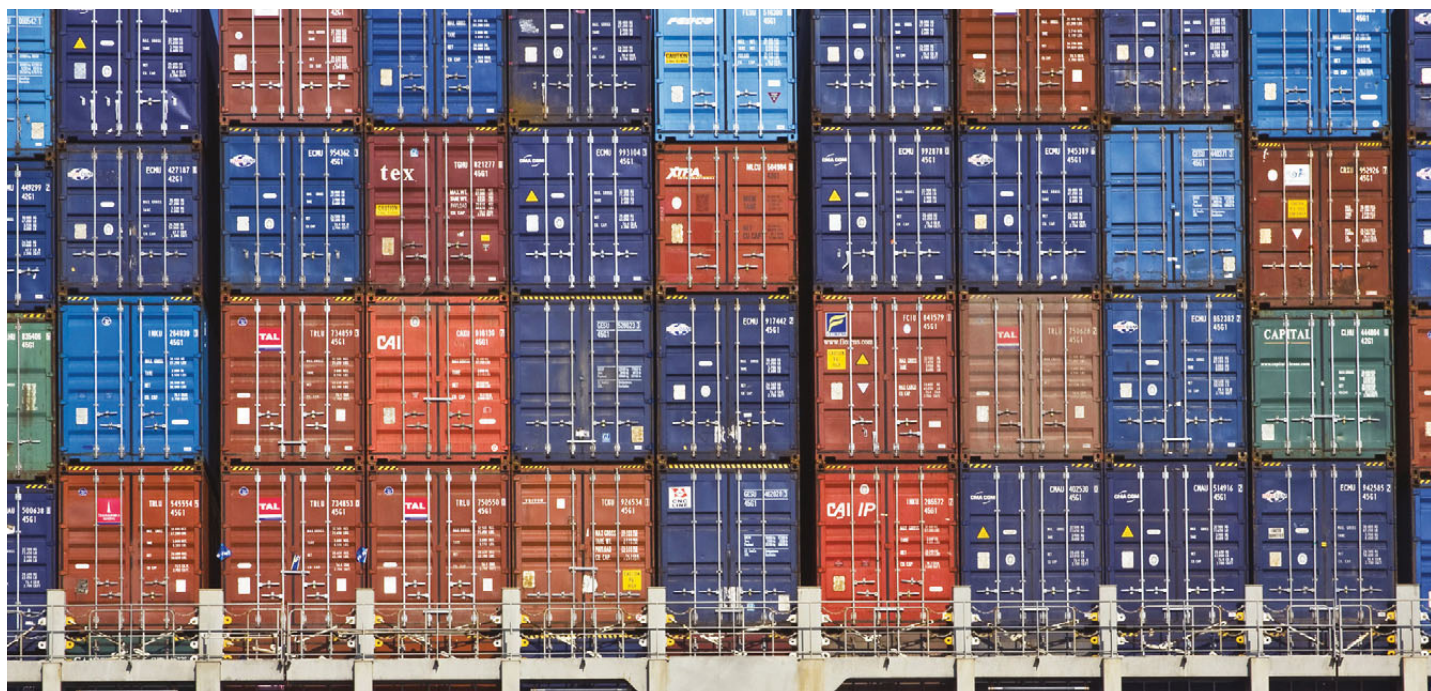
THE PLAZA GROUP

2024 SALES: \$267.4M

Houston, Texas, US

theplazagrp.com





President: Randy Velarde

Products: Benzene; methanol; mixed xylenes; nonene; aromatics 100 and 150; phenol; urea; ammonium polyphosphate; Litho-Nutri; lignolsulfinate; diesel; gasoline

Services: Distribution of petrochemicals.

86

NEO CHEMICAL
2024 SALES: \$264M
Dzerzhinsk, Russia

www.neochemical.ru

CEO: Vladimir Fedyushkin

Products: Oil and fuel additives; epoxy resins; hardeners; titanium dioxide; polyisobutylenes; peroxide compounds; food ingredients; PVC additives; raw materials for cosmetics and household chemicals; pharmaceutical raw materials

Services: Advanced logistics solutions; technical and marketing support

Assets: 21 warehouses

Trading sales: 49%

87

TELKO
2024 SALES: \$262.2M (€253.3M)
Espoo, Finland

www.telko.com

CEO: Mikko Pasanen

Products: Solvents; specialty chemicals; life science ingredients; thermoplastics; engineering plastics; plastics additives; masterbatches; bio plastics; industrial lubricants; car chemicals

Assets: Local offices in 17 countries; 80+ warehouses; 360 professionals

88

TAJAL MULOOK
2024 SALES: \$262M
Dubai, UAE

www.tajchem.com

Chairman: Irfan Siddique Mulla

Products: Polyurethane chemicals; lubricant additives and base oils; paints and coating raw materials; construction chemicals; food ingredients; plastics; polymers raw materials

Services: Global marketing and sourcing; logistics support; inventory management; warehousing; blending and repacking; bulk storage; local distribution in GCC market

Assets: Warehousing in UAE and Saudi Arabia; bulk storage facility in UAE

Trading sales: 65%

89

RINCHEM
2024 SALES: \$250M
Albuquerque, New Mexico, US

www.rinchem.com

CEO: Chris Easter

Services: Hazardous materials warehousing; bonded warehousing; cleanroom/diptyube exchange services; cross-docking; hazardous materials transportation; temperature-controlled transportation; expedited transportation; local delivery; hazmat air and ocean freight; integrated logistics management

Assets: 30 global locations; 60 tractors and 200 trailers (between our 2 asset trucking companies Carolina Tank Lines and CGL transport, not including our final mile trucks)

90

TRANSMARE CHEMIE
2024 SALES: \$249.3M
Antwerp, Belgium

www.transmare.com

CEO: Patrick Van Ende

Products: Fine chemicals for pharma, personal care and detergents; ingredients for food and feed; full range of additives for in-

dustrial sectors like CASE, oil and gas

Services: Warehousing; blending and formulating

Assets: Class I storage facilities in Antwerp, Hamburg and Singapore; local offices in Morocco, Tunisia, Algeria, Ivory Coast, South Africa, Uruguay, Guatemala and Saudi Arabia

Trading sales: 50%

91

THOMMEN-FURLER GROUP
2024 SALES: \$249M (€240.6M)
Ruti bei Buren, Switzerland

www.thommen-furler.ch

CEO: Franz Christ

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

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

Assets: 8 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; 58 road tankers and trucks; 114 tank wagons and tank containers; multimodal transfer station and isotainer storage

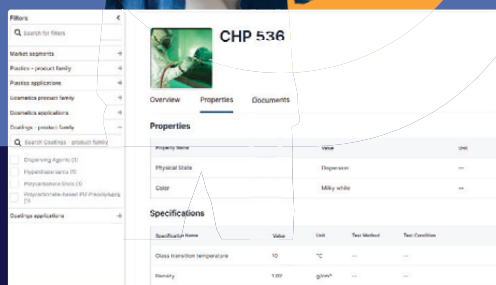
92

SMC GLOBAL
2024 SALES: \$248.3M
New York, New York, US

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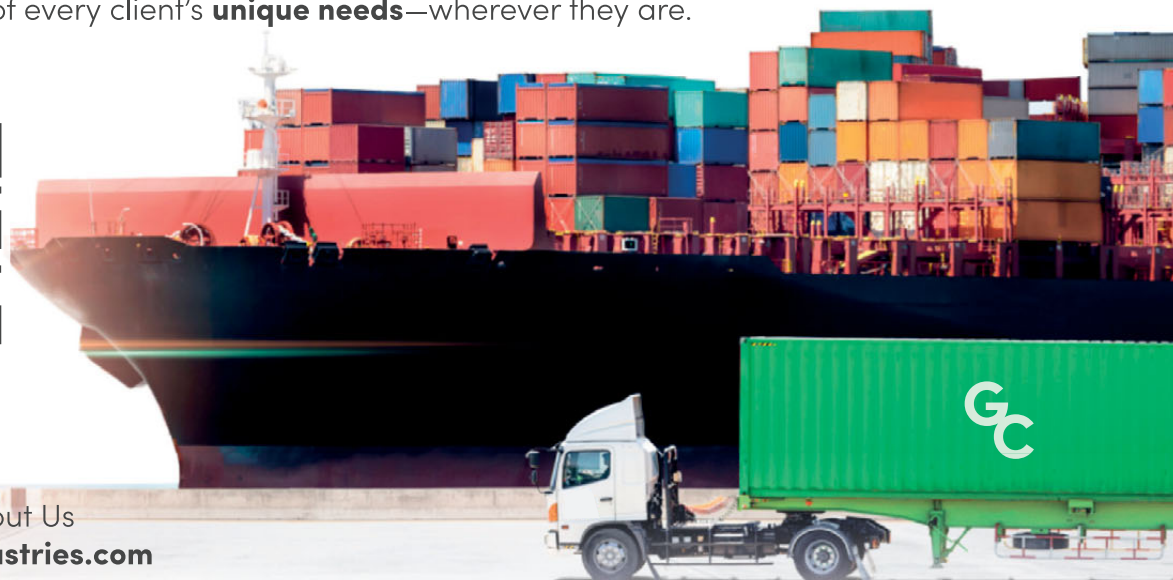
www.ionicpim.com

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greenchemindustries.com



www.smc-global.com

CEO: Adam Feldman

Products: CASE; chemicals for oil and gas, water treatment, construction, agriculture, mining, electronics, textiles; intermediates; flame retardants

Assets: Sites in San Angelo and Houston, Texas; Kershaw, South Carolina; Kansas City, Kansas; 50 trucks; 400 ISO containers

93

KH CHEMICALS

2024 SALES: \$241.2M (€233M)

Zwijndrecht, Netherlands

www.khchemicals.com

General Manager: Daan Doomen

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

Trading sales: 3%

94

WWRC HOLDING

2024 SALES: \$235M

Singapore

www.wwrc.com

CEO: Teoh Weng Chai

Products: Resins/intermediates; additives/catalysts; pigments/fillers/extenders; other chemicals/solvents; grinding media

Services: Technical services; logistical services

Assets: 9 warehouses; 4 laboratories

Trading sales: 10%

95

COUNT ENERGY DISTRIBUTION

2024 SALES: \$230M

London, UK

www.countgroup.com/en/distribution

CEO: Jeroen Baaima

Products: Aromatics; glycols; acrylic monomers; solvents; intermediates; acids; specialties; ketones; anhydrides; ethers

Services: Supply of chemical raw materials; full logistics provider; storage; optionality; global sourcing

96

ACCORD CHEMICAL

2024 SALES: \$221.3M

Mumbai, India

www.accordchemicals.com

Managing Director: Jinesh Mahendra Shah

Products: Acrylates; monomers; oxo alcohols; solvents; glycols; ketones; speciality chemicals.

Services: Transportation; storage tanks; clearance; survey; repackaging; vessel chartering

Assets: Owned offices; warehouses; storage tanks

Trading sales: 21%

97

**CHEM INTERNATIONAL
(INCLUDING CHEM TRADING)**

2024 SALES: \$217M

Warsaw, Poland

www.chem.international

Board Member, CEO: Pawel Tomaszewicz, Cezary Mielczarek

Products: Styrene; EPS; IPA; VAM; methanol; glycols; solvents; anhydrides; caustic soda; BA; phenol

Services: Logistics support; intermodal solutions; warehouses; storage; customized services and solutions; technical support

Trading sales: 40%

98

EL-MOHANDES

2024 SALES: \$214.9M

Behira, Egypt

www.el-mohandes.com

Chairman and CEO: Mohamed Mahmoud Kassem AboAlkhaie

Products: Wood coatings; automotive coatings; blended solvents; esters; glycols; glycol ethers; aromatic hydrocarbons; alcohols; ketones; plasticizers; acrylates; amines; chlorinated solvents; monomers; oils; other chemicals; resins/polymers

Assets: Factory total area of 84,000 square meters; El Kekhila terminal (26,000 square meters); Al-Ameriya free zone branch (4,050 square meters); storage tanks at headquarters – 8 tanks, storage of 5.2m liters; El Dekhila terminal – 48 tanks, storage of 87m liters; road tankers – 42 units; jumbo trucks – 74 units; service vehicles – 62 cars; 10 total warehouses – 6 for raw materials; 2 for finished goods; 2 for packing materials; 2,038,709 machines and equipment

Trading sales: 75.5%

99

2M GROUP OF COMPANIES

2024 SALES: \$214M

Runcorn, UK

www.2m-holdings.com

Founder, Group Chair, CEO: Mottie Kessler

Products: AdBlue for emissions reduction;



aerospace approved products; biopolymers for packaging; chlorine gas for water treatment and chemical synthesis; fragrances; hydrocarbons and oxygenated solvents; formulations for personal care; sustainable coatings; pharmaceutical excipients and APIs; phosphating for metal pre-treatment; precision cleaning solutions; preservatives; Sam-sol, Triklone, Perklone and MEC prime brands; surfactants; chelates and biocides; emulsifiers and functional ingredients

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

Assets: Warehousing in UK, Benelux, France, Germany, Italy, Nordics, Poland and Spain; product and technology development and application laboratories; blending and manufacturing facilities

100

IMPAG GROUP

2024 SALES: \$208.4M (SWFR189M)

Zurich, Switzerland

www.impag.com

CEO: Remo Bernardi

Products: Ingredients for personal care, food, pharmaceutical and industrial applications

Services: Technical, formulation and marketing support; global logistics; sourcing; warehousing; mixing; filling; packaging; labeling; regulatory support

Assets: 6 sales offices across Europe; application labs; tank farm for liquid goods; filling line for chemicals

Trading sales: 10%

101

JULIUS HOESCH

2024 SALES: \$207M (€200M)

Duren, Germany

www.julius-hoesch.de

Managing Directors: Stephan Andreas, Gisela Braun

Products: Surfactants; chelating agents; solvents; acids; leaches; cosmetic additives; preservatives; plasticizers; defoamers; silicones; emulsifiers; polymers; solids; water treatment; special fuel

Services: Blending; toll production; application support; regulatory support; product development

Assets: Full service provider owning 90,000 square metres of production and warehouse space; extensive product range; laboratory service; support in legislation; labeling; safety data sheets; formulation; customized packaging sizes; own logistics service provider

Trading sales: 10%

102

CEMP

2024 SALES: \$207M (€200M)

Clichy, France

www.icis.com



ce-mp.com

President: Julien Achcar

Products: Starches and sweeteners; food additives; polymers; fats and oils; agricultural and dairy products; chemicals

Services: Sourcing; finance; transport and logistics

Trading sales: 100%

103

BARCELONESA GROUP

2024 SALES: \$206M (€199M)

Barcelona, Spain

www.barcelonesa.com

CEOs: Albert Colléll, Enric Colléll

Products: Food and feed blends and additives; agrochemicals: specialties and micro-nutrients; additives for oil drilling and completion; products for mining; resins; curing agents and composites; metal-working formulations; detergent, disinfection and home care chemicals; personal care and pharma ingredients; textile and leather chemicals; chemicals for coatings, inks, adhesives; construction chemicals; lubricants; paper chemicals; pool chemicals; environmental services chemicals; polyols and PU; chlor-alkalis; acids and bases; metallic salts; solvents; amines; glycols; enzymes.

Services: Blending and formulating; custom and toll manufacturing; contract manufacturing; labeling; drumming; packaging development; technical assistance; environmental assistance; VMI (telemetry); agency; bond warehousing for 3rd parties; logistics: specialized warehousing for dangerous goods; transportation

Assets: Warehouses with palletized storage

capacity of 70,000 square meters = 56,000 pallets located in Southwest Europe and Northern Africa; sea tanks for distribution of 10,000 cubic meters; trucks

Trading sales: 23%

104

PROCHEMA

2024 SALES: \$204.9M (€198M)

Vienna, Austria

www.prochema.com

CEO: Werner Figlhuber

Products: Additives and hardeners; acrylates and methacrylates; binders and resins; monomers; organic acids; polymers and biopolymers; polyurethane feedstocks; flame retardants; reactive diluents; UV curing monomers

Services: Pan-European sales network; specialized on selected customer branches; market research; financing; storage; supply chain management; deliveries to multinational customers worldwide

Assets: 17 sites in Europe and Asia

Trading sales: 15%

105

HARKE GROUP

2024 SALES: \$203.5M (€196.6M)

Muelheim an der Ruhr, Germany

www.harke.com

President: Thorsten Harke

Products: Home care I&I chemicals; coatings; electronics/high purity chemicals; food ingredients; health and functional food; industrial chemicals; cosmetics/personal care ingredients; pharma excipients; plastics; rubber chemicals; specialty plastic films; specialty chemicals; polymers; water-soluble films; watertreatment chemicals



Services: (Re-)formulation; development; regulatory advice; blending; mixing; contract encapsulation; contract packaging; refilling; sandblast gravure; pre-print

Assets: Warehouses in European countries; 3 production sites (Germany, Hungary, UK); 10 packaging and encapsulation lines; filling stations

Trading sales: 10%

106

RAINOLDI

2024 SALES: \$200.8M (€194M)

Levate, Bergamo, Italy

www.rainoldi.it

CEO: Simone Bombardieri

Products: Base chemicals; water treatment chemicals

Services: Storage and transport

Trading sales: 80%

107

SRI BALAHA CHEMICALS

2024 SALES: \$199.8M (RS17.1BN)

Chennai, India

www.balaha.com

Managing Director: K Shiva Prasad

Products: Chemicals; metals; polymers; solvents; food products; water treatment chemicals

Assets: 15,000 square foot warehouse in Chennai, India

Trading sales: 2%

108

ECHEM (EUROPEAN CHEMICAL MARKETING)

2024 SALES: \$198M

Amsterdam, Netherlands

www.ecem.com

Directors: Remco Barendse, Cindy Barendse
Products: aAcrylates and methacrylates; hydroxy monomers; anhydrides; more than 150 complementary products and special monomers for coating resins and polymers; adhesives and sealants; water treatment chemicals

Services: One-stop shopping and global supply chain service to customers in Europe, US and Brazil; bulk and packed stocks; packaging; blending; consignment stocks; agents and representatives for producers;

Assets: Sales offices in EU, US, Brazil, Japan; bulk and packed storage; isotanks for dedicated transport and SS IBCs

Trading sales: 3%

109

FEBO GROUP

2024 SALES: \$196.7M (€190M)

Pistoia, Italy

www.febo.it

CEO: Giuseppe Carocchi

Products: PE; PP; PVC; PST; ABS; SAN; engineering polymers; PCR; PIR; biopolymers

Services: Logistics; assistance and technical support

Assets: Owned warehouses in Greece and Italy; trucks; team of 90 employees and 40 collaborators

Trading sales: 20%

110

GROLMAN GROUP

2024 SALES: \$194.6M (€188M)

Neuss, Germany

www.grolman-group.com

CEO: Florian Grolman

Products: Pigments; dyes; fillers; performance materials; additives; resins; personal care ingredients

Services: Lab services

Assets: Laboratories; warehouses

111

CONNECT CHEMICALS

2024 SALES: \$194M

Ratingen, Germany

www.connectchemicals.com

CEOs: A. Basar Karaca, Dirk Otmar

Products: Household and industrial care chemicals; cosmetics and personal care ingredients; water treatment chemicals; lubricants and metal working chemicals; paper chemicals; coatings; adhesives and sealants; plastics

Services: Custom manufacturing; production; storage; blending

112

KPL INTERNATIONAL

2024 SALES: \$192.8M (RS16.50BN)

New Delhi, India

www.kplintl.com

Managing Director: Surinder Kumar Kak

Products: Bulk and essential chemicals; polymers; paper and allied chemicals; food, pharma, nutraceuticals, personal care ingredients; specialty chemicals; paints and coatings chemicals; industrial and specialty gases; engineering consumables

Services: Development of markets for new products and applications; repackaging; market intelligence; technical and after-sales support; sourcing; exports; procurement and auditing services; Sourcing and exporting from India, China and Middle East; warehousing and logistics

Assets: 11 warehouses; 1 applications lab; 2 bottling facilities for refrigerant and industrial gases; 8 wind turbines with generation capacity of 15.35MW

Trading sales: 38.4%

113

MAYS CHEMICAL

2024 SALES: \$189M

Indianapolis, Indiana, US

www.mayschem.com

Vice President and General Manager: Kristin Corbitt

Products: Acidulants; alkalis; citrates; emulsifiers; flavors; glycerine; glycols; phosphates; purified water; preservatives; surfactants; accelerators; resins; oxides; silicas; polymers; rubbers; pigments.

Services: Traditional and specialty distribution; inventory management; warehousing; liquid and dry blending; repacking; reformulation

Assets: 5 warehouses; 3 warehouse/repack/blending facilities; bulk off-loading; liquid tank trailers; various forklifts/related equipment; blending and repacking equipment

114

ANDINO CHEMICAL GROUP

2024 SALES: \$187M

Houston, Texas, US

www.andikem.com

CEO: Peter Staartjes

Products: Alcohols; acid and lyes; solvents; food and feed ingredients; renewables tallow and UCO

Services: Sourcing and procurement; bulk ocean transportation; bulk liquid storage; last mile delivery

Assets: Bulk chemical marine terminal in Tuxpan, Mexico

Trading sales: 30%

115

BANG & BONSONER

2024 SALES: \$186.3M (€180M)

Helsinki, Finland

www.bangbonsomer.com

CEO: Mikko Teittinen

Products: Food ingredients; construction chemicals; process chemistry; personal care ingredients; cleaning chemicals; packaging; performance polymers; composites; adhesives; WoodTec; coatings

Services: Blending; manufacturing; R&D; warehousing

Assets: Warehouses; manufacturing facilities and laboratories in 9 countries in North and East Europe

116

CRESCENT GROUP (INDIA)

2024 SALES: \$186M

Mumbai, India

www.crescentindia.com

Managing Director: Ashit Shah

Products: Methanol; toluene; phenol; solvent C9; EDC; titanium dioxide (TiO₂); hexane; MEK; MIBK; butyl acrylate; acetic acid; acetone; acrylonitrile; acrylic acid; butanol; IPA; cyclohexanone; mixed xylene; cresols; cyclohexane; sabutol; pentylol; Prop-BH; ethyl acrylate; VAM; MMA; heavy aromatics; rock phosphate; melamine; caustic soda; nylon 6; MEG; DEG; hydrogen peroxide; specialty chemicals; PE; PP

Services: Trading; storage; logistics; warehousing; bulk and packed products

Assets: Warehouses; drumming facility; leased bulk tanks

Trading sales: 10%

117

KTM

2024 SALES: \$185.5M

Istanbul, Turkey

www.ktm.com.tr

CEO: Keyan Zulfikari

Products: Polymers; oxo alcohols; solvents; plasticizers; monomers; polyurethane raw materials; organic and inorganic chemicals

Services: International marketing; logistics;

packaging; storage; inventory management; VMI and JIT; blending; financing

Assets: Pan european coverage and offices; shore tanks and bulk storage facilities; numerous warehouses covering Europe and Turkey; truck fleet and road tankers

Trading sales: 40%

118

SYRUS HOLDING

2024 SALES: \$184.7M

Luxembourg

syrusdistribution.com

Founder and Owner: Tanguy van Goitsenhoven

Products: Polypropylene (PP); polyethylene (PE); polystyrene (PS); polyvinyl chloride (PVC); acrylonitrile butadiene styrene (ABS); polycarbonate (PC); titanium dioxide (TiO₂); epoxidized soybean oil (ESBO); calcium carbonate

Trading sales: 66%

119

ATLANTIC CHEMICALS TRADING

2024 SALES: \$178.5M (€172.5M)

Hamburg, Germany

act.de/en

Chief Operating Officer: Matin Ghaffari

Products: Amino acids; flavours and fragrances; energy ingredients; plant extracts;



acidifiers and preservatives; sweeteners and sugar substitutes; vitamins and derivatives; excipients and APIs; hydrocolloids
Assets: Warehouses; laboratory
Trading sales: 5%

120 INTERMARC 2024 SALES: \$178.5M (€172.5M) Rotterdam, Netherlands

www.intermarc.nl

CEOs: PB van Woerkom, CWJ van Woerkom
Products: Printing inks/flexible packaging; coatings; paints and lacquers; coating binders; PU foams and elastomers; adhesives; rubber compounding; industrial process fluids (lubricants and cutting oils); pharma API, CMO and CMDO; chemical industry and custom synthesis industry; crop protection; cement and construction chemicals; fertilizers; cement and construction chemicals; personal care/cosmetics

Services: Storage; transportation

Assets: ISO containers; storage

Trading sales: 2%

121 PLASMAR 2024 SALES: \$177.4M Istanbul, Turkey

plasmar.com.tr

Chairman: Mehmet Altunkilic

Products: PE; PP; PVC; EVA; PS; EVOH; POM

Services: International sourcing; supply chain management; international trading; storage and logistics; financing

Assets: 30+ warehouses in 4 different countries; 50+ worldwide sourcing facilities

Trading sales: 95%

122 KEYSER & MACKAY 2024 SALES: \$176M (€170M) Amsterdam, Netherlands

www.keysermackay.com

Managing Partners: Gerard de Waal, Willem Augustinus

Products: Specialty chemicals; raw materials for coatings, inks, plastics, rubber, adhesives, sealants, construction, personal care, food, feed, pharma and other applications

Services: Technical sales and marketing; local and central stockholding; laboratories and sampling

Assets: Offices and warehouses in 8 European countries

Trading sales: 10%

123 FARAVELLI GROUP 2024 SALES: \$168.9M (€163.2M) Milan, Italy

www.faravelligroup.com

CEO: Luca Benati

Products: Chemicals and raw materials for food, nutraceuticals, pharma, cosmetics, industrial applications

Services: R&D; regulatory support; blending; repackaging

Assets: 1 production plant; 2 application labs (cosmetics and food); 14 warehouses worldwide

Trading sales: 75%

124 ELTON 2024 SALES: \$166.3M (€160.7M) Attica, Greece

www.elton-group.com

CEO: Alkistis Papathanasiou

Products: Raw materials and specialty ingredients for food, detergents, cosmetics, pharma, coatings, construction, agrochemicals, PU, metal; water treatment chemicals

Services: Technical promotion; business development and local logistics in Southeast European markets – Greece, Romania, Bulgaria, Serbia, Ukraine, Hungary, Turkey, Kosovo, Albania, North Macedonia, Cyprus

Assets: 9 local warehouses; bulk storage facilities; development labs; privately owned trucks and tank trucks

Trading sales: 12%

125 AEGEAN FIRST COMPANY (AFCO) 2024 SALES: \$165.6M (€160M) Athens, Greece

www.afco.gr

CEO: Christos Spanos

Products: Polymers; specialty chemicals; organic and inorganic chemicals; pharmaceuticals; agrochemicals; food ingredients

Services: Storage; technical support; technical sales

Trading sales: 5%

126 UCG (UNITED CHEMICAL GROUP) 2024 SALES: \$164.7M Moscow, Russia

www.ucgrus.com

CEO, Chairman: Stepan Dobyndo, Gennady Tolstobrov

Products: ABS; ASA; SAN; HIPS; GPPS; PC/ABS; PBT; PMMA; PC; POM; SBS; SEBS; SIS; POE; EVA; MLLDPE; LDPE; HDPE; PPCOPO; PA and AIM; PVC; TiO₂; 2-EH; MMA; AA; road construction materials; oil additives and mod-





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the trading and
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industry.



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North America chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
1	Univar Solutions*	8,654	25	Barton Solvents	269.5	49	Valudor Products	79.3
2	Brenntag	6,597.4	26	SMC Global	248.3	50	TRIISO	78
3	Tricon Energy	2,282.4	27	Omya	242.6	51	Brainerd Chemical	77
4	Kolmar Group	1,616.8	28	The Plaza Group	233	52	Tennants Distribution	76.4
5	Azelis	1,320.7	29	Rinchem	200	53	Coast Southwest	75.4
6	NAGASE & CO	1,135.4	30	DKSH Performance Materials	190	54	Hubbard-Hall	75
7	IMCD	1,029.9	31	Mays Chemical	188.9	55	SolvChem	64
8	Hawkins	930.8	32	Integrity Partners Group (IPG)	163.7	56	SolvChem, Inc	64
9	Hydrite Chemical	875	33	ClearTech Industries	145	57	ALAC International	61.3
10	Barentz	868.4	34	Skyhawk Chemicals	142.5	58	Walsh & Associates	61.1
11	Quadra Chemicals	698.3	35	Tanner Industries	137	59	Aktopa	60
12	HELM	696.6	36	Webb Chemical Service	129.4	60	United Mineral & Chemical	60
13	Shrieve Chemical	650.2	37	Coyne Chemical	129.2	61	Rierden Chemical & Trading	59.3
14	Ravago Chemicals	501.4	38	Pride Chemical Solutions	125	62	Min-Chem/Lawrason's/CK Ingredients Group	57.4
15	EMCO Chemical Distributors	419	39	TER Group	120	63	Stavian Chemical	56.5
16	ChemGroup	352	40	Cellmark	118.5	64	Veckridge Chemical	54.9
17	LBB Specialties	345	41	The Chemical Company	117.9	65	PHT International	53.6
18	Caldic	341.6	42	K-Solv Chemicals	108.9	66	ECHEMI Group	52.5
19	Interstate Chemical	323	43	Astro Chemicals	104	67	Research Solutions Group	50
20	Colonial Chemicals	315.4	44	Harwick Standard	103.6	68	Ideal Chemical and Supply	50
21	Wego Chemical Group	302	45	GreenChem Industries	99	69	Petrochem Middle East	49.7
22	Superior Industrial Solutions	300	46	Safic-Alcan	94	70	Redox	49.2
23	Tilley Distribution	290.4	47	Radchem Products	85.7	71	TZ Group	46.2
24	HB Chemical	276.5	48	Buckley Oil Company	80	72	Connect Chemicals	46

ifiers; base oils; fertilizers; liquid and bulk chemicals; painting and coating chemicals; rubbers; latex

Services: Warehousing; packaging and re-packing; lab and tech support; bunkering; storing

Assets: 12 offices; 15 warehouses; 3 international branches; laboratory

Trading sales: 10%

127

INTEGRITY PARTNERS GROUP (IPG)

2024 SALES: \$163.7M

Roanoke, Virginia, US

www.integritypartnersgrp.com

CEO: Darren J. Birkelbach

Products: Organic and inorganic solvents; custom blends; USP food and beverage grade ethanol; aliphatics; aromatics; ketones; food and pharma ingredients; acrylics; silicones; metal-working fluids; chloro-alkali; acids; oils; lubricants; plasticizers; fine chemicals

Services: Custom blending and packaging; toll manufacturing; railcar transloading; USP packaging; custom logistics; quality testing; white-label formulations.

Assets: 7 locations featuring a combined 2.7m gal storage capacity, 80,000 gal blending capacity, 450,000 square feet of storage; 25+ rail-car spur availability; private fleet of 50+ trucks

128

DOLDER GROUP

2024 SALES: \$160.4M (€155M)

Basel, Switzerland

www.dolder.com

CEO: Bruno Crippa

Products: Plastic granules; special compounds; masterbatches; resins and binders; additives; inorganic chemicals; pigments; elastomers; crosslinkers; fillers; filter media; filter systems

Services: Laboratory services and analysis; technical training; environmental services; business intelligence; market share analysis; digital marketing; logistics

Assets: 90 employees; 8 subsidiaries

Trading sales: 5%

129

PRAKASH CHEMICALS INTERNATIONAL

2024 SALES: \$155.5M

Vadodara, Gujarat, India

www.pciplindia.com

Managing Director: Manish K. Shah

Products: Caustic soda; sodium sulphate anhydrous; benzyl alcohol; sodium lauryl ether sulphate; ethyl acetate; benzyl chloride; chlorinated paraffin; soda ash; white oil; benzyl benzoate; poly aluminium chloride; cocamidopropyl betaine; cinnamic aldehyde; hydrochloric acid; toluene diisocyanate

Services: Blending; packaging; storage; toll manufacturing; customized labelling; logistics; ex works to DDP; quality assurance; pre shipment inspection; country specific documents compliance; Reach registration; FAMI-QS certification; ISO 9001:2015; ISO 14001: 2015; ISO 22000:2018 for food safety; halal and kosher certifications; four star export house by DGFT India

Assets: Manufacturing plant for custom blends; R&D lab; 2 application development centers; 2 QC labs; 3 warehouses; repacking stations; 4 subsidiaries outside India; 2 satellite offices in metro cities in India

130

ATALANT EUROPE

2024 SALES: \$153.3M

Alicante, Spain

www.atalant.com

CEO: Efrén Carbonell

Products: Plastic raw materials; HDPE; LLDPE; MDPE; LDPE; PP homopolymer; PP copolymer; PP random copolymer; PVC; PS; PA; PET; hexene; butene; metallocene

Services: Technical service; own integrated logistics (trucks, silo trucks); financing; forecast of market trends

Assets: Warehouses; laboratories; trucks; machines to fill silo trucks from bags; machines to make big bags

Trading sales: 15%

North America chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
73	Vivion	45	96	Prakash Chemicals International	16.2	119	CEMP	3.1
74	Independent Chemical	45	97	ChemCeed	15.1	120	Arpadis Benelux	3.1
75	BassTech International	44.6	98	Snetor	15	121	HARKE Group	3.1
76	Van Horn, Metz & Co	38.8	99	KH Chemicals	14.5	122	Simagchem Asia	3
77	Producers Chemical	38.5	100	ECCEM (European Chemical Marketing)	14	123	Kempro Kimyasa Maddeler	3
78	R.E. Carroll	35.8	101	Custom Chemical Services	13.4	124	Taj Al Mulook	2.7
79	Gadot Group	35.1	102	Sinochem Plastics	12.8	125	2M Group of Companies	2.4
80	Continental Industries Group	35	103	Quimica Anastacio	12.5	126	Rotterdam Chemicals Group	2.1
81	Seeler Holdings	35	104	Lehmann & Voss	12.4	127	Accord Chemical	2.1
82	Atlantic Chemicals Trading	30.5	105	Manuchar	12	128	Shanghai Skyseven Chemical	2
83	Intermarc	30.5	106	Dynamix	11.1	129	Sunrise Group	1.8
84	RAHN Group	30.1	107	Classic Distributing	11	130	Cornelius Group	1.6
85	CJ Chemicals	30	108	Nordmann, Rassmann	10.4	131	Jobachem	1.6
86	Seacole	30	109	ProChema	9.3	132	Servochem	1.5
87	United Chemical International	30	110	Aug. Hedinger	7.8	133	Comercial Quimica Masso	1.4
88	GJ Chemical	27.5	111	BdV Behrens	7.7	134	Bax Chemicals	1.4
89	Gulf Coast Chemical	25.3	112	Bodo Moeller Chemie	7.2	135	Pon Pure Chemicals Group	1.3
90	Novasol Chemicals Group	22.8	113	Inmotion Chemicals	6.7	136	Vidara	1.3
91	OQEMA	20.7	114	Faravelli Group	6.2	137	Newport Industries	1.2
92	Cremer Erzkontor	20	115	Norkem Holdings	4.6	138	Mruchem	1
93	Schibley Solvents & Chemicals	20	116	DutCH2	4.2	139	KPL International	1
94	Brisco	20	117	Biesterfeld	4			
95	Jebsen & Jessen Group	16.6	118	Mitsubishi Shoji Chemical	3.7			

* US and Canada

Note: Sales are in the specific region and may differ from total company sales. Sales \$1m and above are included

131

GLOBE CHEMICALS

2024 SALES: \$150.1M (€145M)

Hamburg, Germany

globe-chemicals.com

CEOs: Olaf Busch, Kai Kesting

Products: Wood and paper; polyurethane; paints and coatings; cosmetics ingredients; detergents; textile chemicals; mining chemicals; oil and gas chemicals

Services: Worldwide sourcing; financing; warehousing and repackaging; customers in 60+ countries around the globe

Trading sales: 40%

132

HAEFFNER GROUP

2024 SALES: \$150M

Asperg, Germany

www.hugohaeffner.com

CEOs: Thomas Dassler, Juergen Martin

Products: Iodine derivatives; water treatment chemicals; paints, ink, coatings, adhesive and resin 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; drumming; repackaging; contract packaging; warehousing of hazardous goods; just-in-time-delivery; application advice; single sourcing

Assets: 6 warehouse facilities across Europe with tank farm for acids/lyes/solvents and hazard analysis and critical control points (HACCP)/GMP+ storage; filling and blending area; 2 laboratories; 30 trucks

Trading sales: 10%

133

NOVASOL CHEMICALS GROUP

2024 SALES: \$149M (€144M)

Belgium, Brussels

novasolchemicals.com

CEO: Francois-Xavier Coiffard

Products: Pharmaceutical ingredients; agrochemicals ingredients; personal care and hair care ingredients; energy and environment chemicals; construction chemicals; resins and coatings.

Services: Multi-sourcing; tailor made services; 97% OTIF delivery; sustainable storage (solar panels, green energy); flexible packaging; filling and repackaging

Assets: Global presence; sales in over 50 countries; expertise in 6 markets (life science and material science); REACH lead registrant.

Trading sales: 10%

134

AUG. HEDINGER

2024 SALES: \$145.2M (€140.3M)

Stuttgart, Germany

www.hedinger.de

CEO: Johann-Ludwig Raiser

Products: Raw materials for technical industries such as coatings/paints, lubricants, cleaning, adhesives, construction; raw materials for life sciences

Services: Sampling; analytical testing (pharmacopoeia standards and customized test methods); batch certification; labeling; repackaging and mixing (also aqueous solutions)

Assets: 2 GMP laboratories; 8 cleanrooms Class 100,000; 16 trucks (including 7 product dedicated tank trucks); dedicated tank farms; warehouses

135

CLEARTECH INDUSTRIES

2024 SALES: \$145M

Saskatoon, Saskatchewan, Canada

www.cleartech.ca

President: Randy M. Bracewell

Products: Acids; activated carbon; alkalis; biological augmentation; chelating and sequestering agents; coagulants and flocculants; corrosion and scale control; chlorination and dechlorination; filtration media; glycols; ion exchange resins; oxygen scavengers; surfactants

Services: Blending; custom packaging; transloading; warehousing

Assets: 10 buildings in 7 cities across Canada

136 ARPADIS BENELUX
2024 SALES: \$142.8M (€138M)
Antwerp, Belgium

www.arpadis.com

CEO: Laurent Abergel

Products: Acrylates and monomers; bio-based products and green/sustainable alternatives; amines; glycols and glycol ethers; RPET; synthetic resin intermediates; polyols; isocyanates; solvents; flame retardants; blowing agents

Services: Blending; dilution; drumming; re-packing

137 SKYHAWK CHEMICALS
2024 SALES: \$142.5M
Houston, Texas, US

www.skyhawkchemicals.com

President: Jill Knickerbocker

Products: Caustic soda; methanol; calcium chloride; sulfuric acid; anhydrous/aqua ammonia; KOH; propylene glycol; hydrochloric acid; bleach; phosphoric acid; ferric chloride; citric acid; sodium thiocyanate; sodium gluconate; ethanolamines (MEA, DEA, TEA)

Services: Packaging; blending; storing

Assets: Totes; drums

Trading sales: 75%

138 RAHN GROUP
2024 SALES: \$141M
Zurich, Switzerland

www.rahn-group.com

CEO: Xavier Marguerettaz

Products: Raw materials for inks, coatings, adhesives and additive manufacturing; personal care ingredients for skin, hair and scalp

Services: Application support; R&D/customized products; regulatory affairs; guide formulations; international logistics; analytics

Trading sales: 50%

139 TANNER INDUSTRIES
2024 SALES: \$137M
Southampton, Pennsylvania, US

www.tannerind.com

President and CEO: Brad Tanner

Products: Anhydrous and aqua ammonia

Services: Full service ammonia supplier; storage tanks; tank maintenance; pump out services; safety training

Assets: 13 distribution locations; full fleet of tractors and trailers; highly trained company drivers

140 THE CHEMICAL COMPANY
2024 SALES: \$134.2M
Jamestown, Rhode Island, US

thechemco.com

President: Robb Roach

Products: Bulk commodities; specialties; solvents; intermediates; plasticizers; oxo alcohols; acids; food and pharmaceutical additives



Services: Warehousing; repackaging; toll blending; rail fleet management; tank truck and LTL shipments

Assets: Fleet of railcars; shore tanks; warehouses

Trading sales: 25%

141 SELECTCHEMIE
2024 SALES: \$133.4M (SWFR121M)
Zurich, Switzerland

www.selectchemie.com

CEO: Oliver Kuehn

Products: APIs; excipients; narcotics; dossiers; FDFS; nutrition ingredients

Services: Quality assurance and regulatory affairs; supply chain; sourcing

Assets: 4 warehouses in EU and Switzerland

Trading sales: 40%

142 NEWPORT INDUSTRIES
2024 SALES: \$131.7M (€105.2M)
London, UK

www.newport-industries.com

Managing Director: Raj Patel

Services: Soda ash; sodium bicarbonate; hydrocarbon resin; calcined bauxite; L-carnitine; resins; mineral animal feed materials

Trading sales: 100%

143 COYNE CHEMICAL
2024 SALES: \$131M
Croydon, Pennsylvania, US

www.coynechemical.com

President and CEO: Thomas H. Coyne Sr.

Products: Acids; alcohols; amines; chelating agents; chlor-alkali; 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: Over 300,000 square feet of storage in 5 warehouses; 25 trucks and over 50 trailers or tankers; over 300,000 gal bulk storage

144 WEBB CHEMICAL SERVICE
2024 SALES: \$129.4M
Muskegon, Michigan, US

www.webbchemical.com

Owner/CEO: Brad Hilleary

Products: Organics; inorganics; surfactants; food ingredients; liquid; dry

Services: Bulk; packaged; contract packaging; logistics; handling; warehousing

Assets: Company owned warehouses; packaging and logistics assets

145 EXPLAST
2024 SALES: \$126.3M (€122M)
Brandys nad Labem, Prague, Czech Republic

www.explast.cz



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Middle East and Africa chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
1	Tricon Energy	2,310.8	33	Biesterfeld	39	65	Foscote Group	3.7
2	Petrochem Middle East	1,781	34	Safic-Alcan	36	66	Bizinbiz Technologies (Elchemy)	3.2
3	Snetor	1,087	35	KLJ Resources	35.3	67	COUNT Energy Distribution	3
4	Solevo	680	36	Pon Pure Chemicals Group	34.8	68	Sanjay Chemicals India	3
5	REDA Chemicals	458	37	HELM	31.1	69	ECEM (European Chemical Marketing)	3
6	Manuchar	436	38	Alchemy	28.8	70	Comercial Quimica Masso	2.8
7	Gadot Group	403.3	39	BdV Behrens	26.2	71	RAHN Group	2.8
8	Somochem	380	40	Rinchem	25	72	TOPNEXT International	2.8
9	AquaChemie	340.4	41	RishiChem Mideast	24.3	73	Bax Chemicals	2.7
10	Azelis	307.2	42	Norkem Holdings	20.9	74	2M Group of Companies	2.5
11	Taj Al Mulook	243.6	43	Servochem	20	75	Aug. Hedinger	2.2
12	Kolmar Group	225	44	Sinochem Plastics	15.7	76	Coreflow Chemi	2
13	El-Mohandes	206.8	45	Eigenmann & Veronelli	15.5	77	VTAR	1.8
14	CEMP	193.6	46	Jebsen & Jessen Group	15.5	78	Crismachem	1.7
15	Cellmark	169.7	47	DutCH2	12.8	79	KPL International	1.7
16	Transmare Chemie	162.5	48	Accord Chemical	11.2	80	WISTEMA	1.6
17	Quimidroga	144.9	49	Globe Chemicals	10.4	81	Shanghai Skyseven Chemical	1.5
18	Vidara	134.6	50	Wego Chemical Group	10.4	82	Lake Chemicals and Minerals	1.3
19	ECHEMI Group	126.3	51	OQEMA	10.4	83	Mruchem	1
20	Al Nahda International (Anichem Group)	120.7	52	Arkem Kimya	10	84	Simagchem Asia	1
21	Prakash Chemicals International	104.7	53	United Chemical International	10	85	Bloomchemag	1
22	Venus Chemicals Group	84.3	54	Plasmar	8.8	86	SIDG (Lavallee)	1
23	Stavian Chemical	75.3	55	Penpet Petrochemical Trading	8.3	87	ProChema	1
24	Continental Industries Group	65	56	Audiche Trading	8	88	Comindex	1
25	Crescent Group (India)	54	57	Grupo RNM	7.8	89	Lehmann & Voss	1
26	The Leela Corp	53.3	58	Sunrise Group	7.6	90	Connect Chemicals	1
27	Leaderchem	50	59	Rotterdam Chemicals Group	7.2	91	Kemat	1
28	Kempro Kimyasal Maddeler	49.5	60	Grolman Group	6.2	92	RSG Chemicals (Ramniklal S. Gosalia & Co)	1
29	Kempar Energy	45	61	EMSA Tecnologia Quimica	5.9			
30	Bodo Moeller Chemie	43.5	62	Barcelonesa Group	5.6			
31	Linkers Chemicals and Polymers	39.8	63	SAME Chemicals	4.1			
32	KH Chemicals	39.3	64	Haeffner Group	4			

Note: Sales are in the specific region and may differ from total company sales. Sales \$1m and above are included

Managing Director: Jan Sovà

Products: LDPE; HDPE; LLDPE; MLLDPE; EVA; PP; GPPS; HIPS; EPS

Services: Wholesale plastics; technical support; product development; logistics

Assets: Warehouses

Trading sales: 30%

146

MOELLER CHEMIE

2024 SALES: \$125.2M (€121M)

Steinfurt, Germany

www.moellerchemie.com

CEO: Rainer Berghaus

Products: Alpha olefins; isoparaffins; plasticizers; benzyl alcohol; dibasic ester; catalysts; hydrocarbons; 1,4-butanediol; dimethyl carbonate; dipropylene glycol dimethyl ether; isotridecanol; methylcyclohexane; monoisopropanolamine; salicylic acid

Services: Filling liquids; transferring solids; stirring; dissolving solids into liquid; melting

polymers; dispersing

Assets: Warehouses; laboratories; trucks

147

PRIDE CHEMICAL SOLUTIONS

2024 SALES: \$125M

Holtsville, New York, US

www.pridesol.com

President: Art Dhom Jr.

Products: Alcohols; hydrocarbon solvents; ketones; glycols; glycol ethers; oleochemicals; silicones; surfactants; polyols; corn syrups; vegetable oils; specialty chemicals

Services: NF USP kosher repackaging; custom solvent blends

Assets: 3 warehouses; 2 laboratories; company owned trucking fleet and drivers

Trading sales: 100%

148

CHIMPEX INDUSTRIALE

2024 SALES: \$123.2M (€119M)

Caivano, Italy

www.chimpex.it

President and CEO: Salvatore Romano

Products: Chemicals; food ingredients; composites; solvents; personal care and cleaning ingredients; automotive chemicals; water treatment chemicals

Assets: Warehouses; laboratory; storage warehouses; production warehouses; tanks; coastal warehouse

149

STAUB & CO – SILBERMANN

2024 SALES: \$123.2M (€119M)

Nuremberg, Germany

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/pharma/cosmetics; water treatment chemicals; thermal transfer agents; ammonium; AdBlue



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Services: Storage; mixing; blending; filling; packaging; polymerization
Assets: 3 warehouses; 20 trucks
Trading sales: 30%

150

**AL NAHDA INTERNATIONAL
(ANICHEM GROUP)**
2024 SALES: \$121.5M

Dubai, UAE

www.alnahdafz.com

Founder and Chairman: TR Vijayan

Products: Acetates; acrylates; alcohols; aromatics; cellulose ethers; coating additives; ethanol; glycols; IPA; LABSA 96; pigments; polymer emulsions

Services: Bulk liquid chemical storage terminal; blending; drumming; 3PL warehousing; customs clearance and freight forwarding

Assets: 25,000 cubic meter tank terminal with dedicated berth access (<500m) at Jebel Ali port; 14 warehouses; 5 production facilities including a 15,000 tonne sulphonation plant; 4 laboratories

Trading sales: 10%

151

**PENPET PETROCHEMICAL
TRADING**
2024 SALES: \$120.1M (€116M)

Hamburg, Germany

www.penpet.com

Managing Director: Christoph Meister

Products: Solvents; plasticizers; oleochemicals; anhydrides; melamine; raw materials for

resins; raw materials for paints/coatings and printing inks

Services: Warehousing; logistics; repacking; drumming

Assets: Warehouses; trucks

Trading sales: 20%

152

CREMER ERZKONTOR
2024 SALES: \$120M
Lubeck, Germany

www.erzkontor.com

Products: Methylene chloride; soda ash; sodium bicarbonate; sodium metabisulphite; phthalic anhydride; pentaerythritol; epichlorohydrine; diallyl dimethyl ammonium chloride; dicyandiamide

Services: International trade; local distribution; processing; recycling

Assets: Warehouses

153

C.H. ERBSLOEH
2024 SALES: \$119.2M (€115.2M)
Krefeld, Germany

www.cherbsloeh.com

Managing Director: Christopher Erbsloh

Products: Coatings adhesives; water treatment chemicals; electronic chemicals; rubber; plastics; lubricant additives; life sciences; food ingredients

154

TRADESTAR GROUP
2024 SALES: \$118.5M (R732.8M)
Itajai, Santa Catarina, Brazil

[tradestar.com.br](https://www.tradestar.com.br)

CEO: Juliano Fornasaro

Products: Polyvinyl chloride (PVC) suspension resin; PVC emulsion resin; polyethylene; polypropylene; ethylene vinyl acetate (EVA); titanium dioxide rutile; titanium dioxide anatase; automotive grade urea; wire; technology; tools

Services: Trading

Assets: warehouses; trucks

Trading sales: 100%

155

BDV BEHRENS
2024 SALES: \$115M (€111.1M)
Hamburg, Germany

<https://bdv-behrens.de>

Managing Partner: Raul Valente

Products: Industrial chemicals; pharma, food and feed chemicals; paper and packaging

Services: International trade; supply chain solutions; global sourcing; financing; quality management

Assets: Sales offices in Brazil, Mexico and US

Trading sales: 100%

156

POLMANN INDIA
2024 SALES: \$114M
Mumbai, India

www.polmannindia.com

Managing Director: Vinod Bhimrajka

Services: Elastomers (EPDM, CR, SBR, NBR, HNBR, FKM, AEM, silicone, POE); polyolefins; rubber chemicals; plastic masterbatches; anti-tacks; crayons and markers; reinforcement materials

Assets: Pan india distribution 4 branch offices and 7 warehouses

Trading sales: 40%

157

PHT INTERNATIONAL
2024 SALES: \$110.8M
Charlotte, North Carolina, US

www.phtinternational.com

CEO: Lihong Yu

Products: Pharmaceutical ingredients; agrochemicals; specialty chemicals

Services: CRO; CDMO

Assets: Laboratories; manufacturing site

Trading sales: 88%

158

SOLVEN SOLVENTES E QUIMICOS
2024 SALES: \$109M
Hortolandia, Sao Paulo, Brazil

www.solven.com.br

CEO: Paulo Sergio Moreira

Products: Aliphatic solvents; aromatic solvents; hydrogenated solvents; drilling fluids; thinners; lubricants; adjuvants; oils; waxes.

Services: Mixing and blending; formulation; storage; packing; bulk distribution; chemical analysis

Assets: 4 warehouses – 2 in Sao Paulo, 1 in Rio de Janeiro, 1 in Bahia; 18m liters of storage; 3 laboratories for product development and

quality control; 1 distribution center for 6m liters under construction in 2025 in Hortolandia, Sao Paulo

159 K-SOLV CHEMICALS

2024 SALES: \$108.9M
Houston, Texas, US

www.ksolv.com

CEO/Owner: Russell Allen

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

Services: Efficient commerce and freight handling; chemical packaging; chemical blending; small and large quantities; maritime services; emergency spill response; disaster response; industrial services

Assets: Tote and drum warehouse – over 100,000 gal on site; tank farm – over 1m gal on site; flare, nitrogen access; chemical laboratory; dock with full waterfront access and licensed tankerman on staff

Trading sales: 30%

erine; water treatment chemicals; pharmaceutical ingredients; peracetic acid; AdBlue

Services: Storage of liquid and solids: production; blending and dissolutions; logistics

Assets: AdBlue, ferric chloride and peracetic production; total area of 80,000 square feet; 16,000 cubic meters liquid storage capacity; 25,000 square feet covered warehouses

Trading sales: 10%

161 CEYENAR

2024 SALES: \$106M
Kottayam, Kerala

www.ceyenar.com

Managing Director: N. Rajagopal

Products: Synthetic rubber; natural rubber; PVC; polyolefins; engineering polymers; fillers; additives; pigments; rubber chemicals; stabilizers; lubricants; plasticizers; process oils; release agents

Services: Trade; supply chain management; logistics

Assets: Warehouses; trucks; offices

Trading sales: 10%

tardants; organic peroxides; dry liquid concentrates; adhesives; stabilizers; vulcanizing agents; activators

Services: Warehousing; bulk break; logistics; storage; import; export; technical support; regulatory support

Assets: 2 company owned warehouses; 7 public warehouses

Trading sales: 2%

163 MERIT CHEMICALS

2024 SALES: \$105M
Tashkent, Uzbekistan

www.meritchemicals.com

CEO: Sarvar Kazakov

Products: Raw materials for coatings, polymers, cosmetics, food industry, pharmaceuticals, leather, detergents, glass, mining, oil and gas, textiles

Services: Customer development; R&D; new product development; consulting; manufacturing; 3rd party logistics

Assets: Warehouses; trucks; laboratories; plants; R&D centers; software

160 CHIMITEX

2024 SALES: \$107.6M (€104M)
Fagnano Olona, Varese, Italy

www.chimitex.it

CEO: Bottini Emilio

Products: Industrial chemicals; caustic soda; acids; glycols; food and feed ingredients; gly-

162 HARWICK STANDARD

2024 SALES: \$105.2M
Akron, Ohio, US

www.harwick.com

President and CEO: Ernie Pouttu

Products: Polymers; rubber chemicals; plasticizers; process oils; blowing agents; flame re-

164 ASTRO CHEMICALS

2024 SALES: \$104M
Springfield, Massachusetts, US

www.astrochemicals.com

President: Chris Diamond

Products: Glyoxal; sodium hydroxide liquid and dry; potassium hydroxide liquid and dry;



Latin America chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
1	Tricon Energy	1,769.9	33	Colormix Especialidades	41	64	Grupo Ketsin	3.6
2	Brenntag	1,026.8	34	Sulatlantica	40.9	65	Norkem Holdings	3.6
3	Manuchar	839	35	Safic-Alcan	39	66	Lehmann & Voss	3.1
4	Univar Solutions*	756.6	36	Morais de Castro	38.4	67	Hubbard-Hall	3
5	Quimica Anastacio	664.3	37	Comercial Quimica Masso	36.6	68	Sinochem Plastics	3
6	Caldic	652.1	38	PQA - Produtos Quimicos Aracruz	35.6	69	Kempro Kimyasa Maddeler	3
7	Snetor	652	39	Brisco	31	70	Taj Al Mulook	2.7
8	IMCD	536.2	40	Cellmark	30.2	71	Grupo RNM	2.6
9	Pochteca Materias Primas	461.1	41	Biesterfeld	30	72	Hawkins	2.5
10	MCassab	409.1	42	Foscote Group	29.3	73	SAME Chemicals	2.1
11	Quimtia	285	43	HB Chemical	25	74	WISTEMA	2.1
12	Azelis	269.4	44	SolvChem	23	75	Penpet Petrochemical Trading	2.1
13	Vidara	258.8	45	DutCH2	20	76	COUNT Energy Distribution	2
14	Continental Industries Group	190	46	Tilley Distribution	18.9	77	RAHN Group	1.7
15	Andino Chemical Group	187	47	FLOSAN	18	78	Atlantic Chemicals Trading	1.6
16	HELM	181.1	48	Quimidroga	17.6	79	Intermarc	1.6
17	Barentz	162.5	49	ECHEM (European Chemical Marketing)	15	80	Barcelonesa Group	1.6
18	Omya	132.3	50	The Chemical Company	15	81	Valudor Products	1.3
19	Tradestar Group	118.5	51	Grupo ADI	13.8	82	Harwick Standard	1.3
20	Solven Solventes e Quimicos	109	52	Inmotion Chemicals	11.3	83	Lake Chemicals and Minerals	1.3
21	Cremer Erzkontor	100	53	Bax Chemicals	9.9	84	R.E. Carroll	1.2
22	Jebsen & Jessen Group	99.4	54	Prakash Chemicals International	9.2	85	Haefner Group	1
23	Stavian Chemical	92.1	55	Belchem Solutions	8.6	86	Mruchem	1
24	Petrochem Middle East	84.6	56	Transmare Chemie	7.7	87	Simagchem Asia	1
25	Kolmar Group	76.8	57	CEMP	7.2	88	Will & Co	1
26	Henry Hirschen	68.2	58	PHT International	6.9	89	BassTech International	1
27	Globe Chemicals	67.3	59	Somochem	5.4	90	Bodo Moeller Chemie	1
28	Wego Chemical Group	61.3	60	Rotterdam Chemicals Group	4.7	91	SIDG (Lavallee)	1
29	BdV Behrens	61.2	61	Shanghai Skyseven Chemical	4.5	*Latin America and Asia Note: Sales are in the specific region and may differ from total company sales. Sales \$1m and above are included		
30	Carbono Quimica	57.2	62	Sunrise Group	3.8			
31	KH Chemicals	45.5	63	Skystep Trading	3.8			
32	ECHEMI Group	42.8						

phosphoric acid tech and food grades; solvents A-Z; glycerine; ketones; denatured alcohols; adhesives both PSA and water-based

Services: Logistical support for trucking; drumming; toting and storage of hazmat and non-hazmat

Assets: 175,000 square feet of warehousing split between 2 locations in Springfield, Massachusetts; 18 tractors; 24 trailers/tankers; 90 skilled, experienced and professional employees

Trading sales: 10%

165

ILARIO ORMEZZANO

2024 SALES: \$102.5M (€99M)

Gaglianico, Italy

www.ilarioormezzano.it

President and CEO: Giancarlo Ormezzano

Products: Solvents; phenol; acrylates; acids; base chemicals; pharmaceutical intermediates; hydrocarbons; AdBlue; amines; glycols;

salts; silicones; vitamins

Services: Storage of liquid and solid products; storage for 3rd parties; blending; customized handling (packaging, mixing, filling and labeling); quality control; technical after sales support; REACH support

Assets: 2 warehouses owned with a total of 85,000 square meters and high storage capacity for liquid and solid products; 1 warehouse for rent; 3 offices; 2 laboratories; 7 trucks.

Trading sales: 20%

166

AIREDALE GROUP

2024 SALES: \$100.4M (£80.2M)

Cross Hills, UK

www.airedale-group.com

Executive Chairman: Chris Chadwick

Products: Agrochemicals; water treatment chemicals; disinfectants; phosphates; food

and beverage ingredients; metal surface treatment chemicals; surfactants; phosphoric acid; hydrogen peroxide; peracetic acid; acetic acid; sulphuric acid; hydrochloric acid; caustic soda; potassium hydroxide

Services: Chemical manufacture; toll manufacturing; small pack filling

Assets: 9 warehouses; 25 storage tanks; 20 privately owned vehicles; 41,000 square feet temperature controlled storage; 5,600 liter reactor capacity

Trading sales: 27.6%

167

GREENCHEM INDUSTRIES

2024 SALES: \$99M

West Palm Beach, Florida, US

greencheimindustries.com

CEO: John Lagae

Products: Acetates; acids; additives; admixtures; alcohols; amines; defoamers; glycols;

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glycol ethers; green/bio; gypsum; inhibitors; oleo; plasticizers; solvents

Services: 3PL; warehousing; packaging; transloading; logistics; import and export

Assets: 35 stocking locations

168

SIDG (LAVOLLEE)

2024 SALES: \$98.3M (€95M)

Levallois-Paris, France

www.sidg.eu

President: Herve O. Lavolee

Products: Food ingredients; specialty chemicals

Services: Storing; repacking; outsourcing; formulating

Assets: Laboratories

169

WITCORP PRODUCTS

2024 SALES: \$97.5M (BT3.348BN)

Bangkok, Thailand

[witcorpproducts.com](https://www.witcorpproducts.com)

Managing Director: Wit Wuttiputanonta

Products: Industrial chemicals; specialty chemicals; food additives; feed additives; lubricants

Services: Toll manufacturing; tank terminal; logistics

Assets: Tank terminal; 4 warehouses; transportation company

170

UNION PETROCHEMICAL

2024 SALES: \$94.4M

Bangkok, Thailand

www.unionpetrochemical.com

Managing Director: Perapol Suwannapasri

Products: Alcohols; aromatics; esters; glycols; glycol ethers; hydrocarbon solvents; ketones; monomers; PP and PE

Services: Blending; packaging; repackaging; storage; delivery; inventory management

Assets: 1 inland terminal; 7 warehouses; 35 trucks

171

URAI

2024 SALES: \$93.2M (€90M)

Assago, Milan, Italy

www.urai.it

CEO: Roberto Giuliani

Products: Specialty chemicals; pigments; additives; resins; paints and coatings chemicals; plastic chemicals; lubricant chemicals; personal care; cosmetic and food ingredients; laboratory equipment

Services: Technical sales and marketing; regulatory services; supply chain management; warehousing; after-sales service; repacking; equipment repairing and maintenance

Assets: Office; formulation laboratories for cosmetic and food; laboratory; 1 external warehouse.

172

MEADE-KING, ROBINSON & CO

2024 SALES: \$91M (£72.7M)

Liverpool, UK

www.mkr.co.uk

Managing Director: Philip Tarleton

Products: Oleochemicals; glycerine; epoxy resins; castor oil; malic acid; waxes; base oils; process oils; food ingredients; ethanol; solvents; vegetable oils and esters

Services: Logistics; blending; formulating; repacking; warehousing and bulk storage

Assets: Warehouse; blending and bulk storage facilities

Trading sales: 100%



173

GRUPO ADI

2024 SALES: \$90.4M (€87.3M)

Terrassa, Barcelona, Spain

www.adigrupo.com

President: Jordi Simo

Products: Chemicals for textile, home care, personal care, lubricants, rubber, corrugated board, films, electroplating, instruments, agrochemicals, digital printing, chest printing, paints and coatings

Services: Technical service; laboratory service

Assets: 3 warehouses in Spain; 1 warehouse in Portugal; 1 warehouse in Brazil; laboratory in Spain; lab in Portugal; lab in Brazil

Trading sales: 60%

174

MAHA CHEMICALS

2024 SALES: \$89M

Singapore

www.maha.asia.com

Executive Chair: Tan Seow Hoon

Products: Additives; pigments and colorants; resins and polymers; functional fillers; biocides; surfactants; plant extracts and cosmetic ingredients; additive printing machines; laboratory equipment

Services: Sales and marketing; stocking; packaging; laboratory set up; equipment maintenance

Assets: Warehouses; offices; trucks

Trading sales: 100%



SPECIAL REPORT

TOP 100 CHEMICAL DISTRIBUTORS



175

HVL

2024 SALES: \$88.5M (€85.5M)

Badenweiler, Germany

www.hvl-online.com

Managing Director: Alexander Lips, Ulrich Lips

Products: MEG; DEG; TEG; engine coolants; ethanol; Alcofreeze Base; iron oxide; aluminium oxide

Services: Import and distribution of bulk chemicals; blending of engine coolants; global logistics; storage; financing

Assets: Bulk tank storage and coolant production hub in Antwerp; HQ in Germany; global network with customers and suppliers

176

SOLVCHEM

2024 SALES: \$87M

Pearland, Texas, US

solvchem.com

President and CEO: Jean-Pierre Baizan

Products: Adhesives and sealants; agriculture; automotive; chemical processors; compounds; electronics; energy and utility; food and beverage; fuels; metals; military; municipal; oil and gas; paints and coatings; personal care/cosmetics; petrochemicals; pharmaceuticals; plastics and rubber; printing; pulp and paper; refineries; semiconductors; soaps and detergents; tires and rubber; water treatment

Services: Blending; custom sourcing; warehousing; logistics; regulatory compliance support; technical assistance; packaging; consultation; sourcing

Assets: Storage facilities; transportation fleet; blending equipment; packaging machinery; distribution network; skilled workforce; quality control systems; customer relationships; industry partnerships.

Trading sales: 20%

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177

RADCHEM PRODUCTS

2024 SALES: \$85.7M

Romeoville, Illinois, US

www.radcheminc.com

President and CEO: Will Radostits

Products: Chemicals and solvents; alcohols; aliphatic and aromatic hydrocarbons; glycols; process and base oils; reuse solvents; resins; ketones

Services: Transport via vessel, rail or tanker; bulk, tote or drum storage; blending capabilities

178

VENUS CHEMICALS GROUP

2024 SALES: \$84.3M

Cairo, Egypt

www.venuskim.com

CEO: Ahmed Alghoul

Products: Fragrances; unilene resin; maliec resin; glycerol ester; gum rosin; pine oil; nitro-cellulose resin; HPMC; SLES; betain; CDEA; glycerine; ethyl glycol ether; hydrogenated castor oil ethoxylated; Tween 20; Tween 80; acrylic thickener; opacifier; PQ7

Assets: 8 warehouses; 1 laboratory; 15 trucks; 8 offices

Trading sales: 59%

179

MOGOIL

2024 SALES: \$83.3M (€80.5M)

Berlin, Germany

www.mogoil.com

Managing Directors: Andreas Rogge, Miroslav Pribyl, Andrey Yashkin

Products: Base oils; process oils; technical

white oils; low viscosity oils; waxes; specialties
Services: Storage; repackaging; tailor made products; technical expertise and logistics support

Assets: Bulk terminal; warehouses

180

VALUDOR PRODUCTS

2024 SALES: \$80.5M

Encinitas, California

www.valudor.com

CEO: Alberto Machado

Products: Water-soluble phosphates; animal nutrition ingredients; micronutrients; agricultural chemicals; industrial chemicals; nutrition ingredients; specialty fertilizers

Services: Global supply chain sourcing; navigating freight and key logistics elements; warehousing and last mile delivery to customers

Assets: Experienced purchasing and supply chain partners; expansive network of 3PL warehouses and carriers near all major US ports and customer locations

181

HUBBARD-HALL

2024 SALES: \$80M

Waterbury, Connecticut, US

www.hubbardhall.com

President and CEO: Molly Kellogg

Products: Solvents; caustic soda; dry products; acids; waste treatment specialties; rust preventatives; semiconductor materials; cleaning chemistries; plating specialties

Services: Toll blending; 3PL storage; lab analysis

Assets: 4 warehouses; 3 manufacturing facilities; 2 labs; tank farm

182

BUCKLEY OIL COMPANY

2024 SALES: \$80M

Midlothian, Texas, US

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; trans-loading

Assets: 4 warehouses; 20 trucks

183

TRIISO

2024 SALES: \$78M

Del Mar, California, US

www.tri-iso.com

President and CEO: Jason Scott

Products: Polyurethanes; paints and coatings; metalworking fluids and lubricants; greases and oils; adhesives and sealants; epoxies; composites and advanced materials; UV technologies; personal care ingredients

Services: Logistics; warehousing; importing and exporting

184

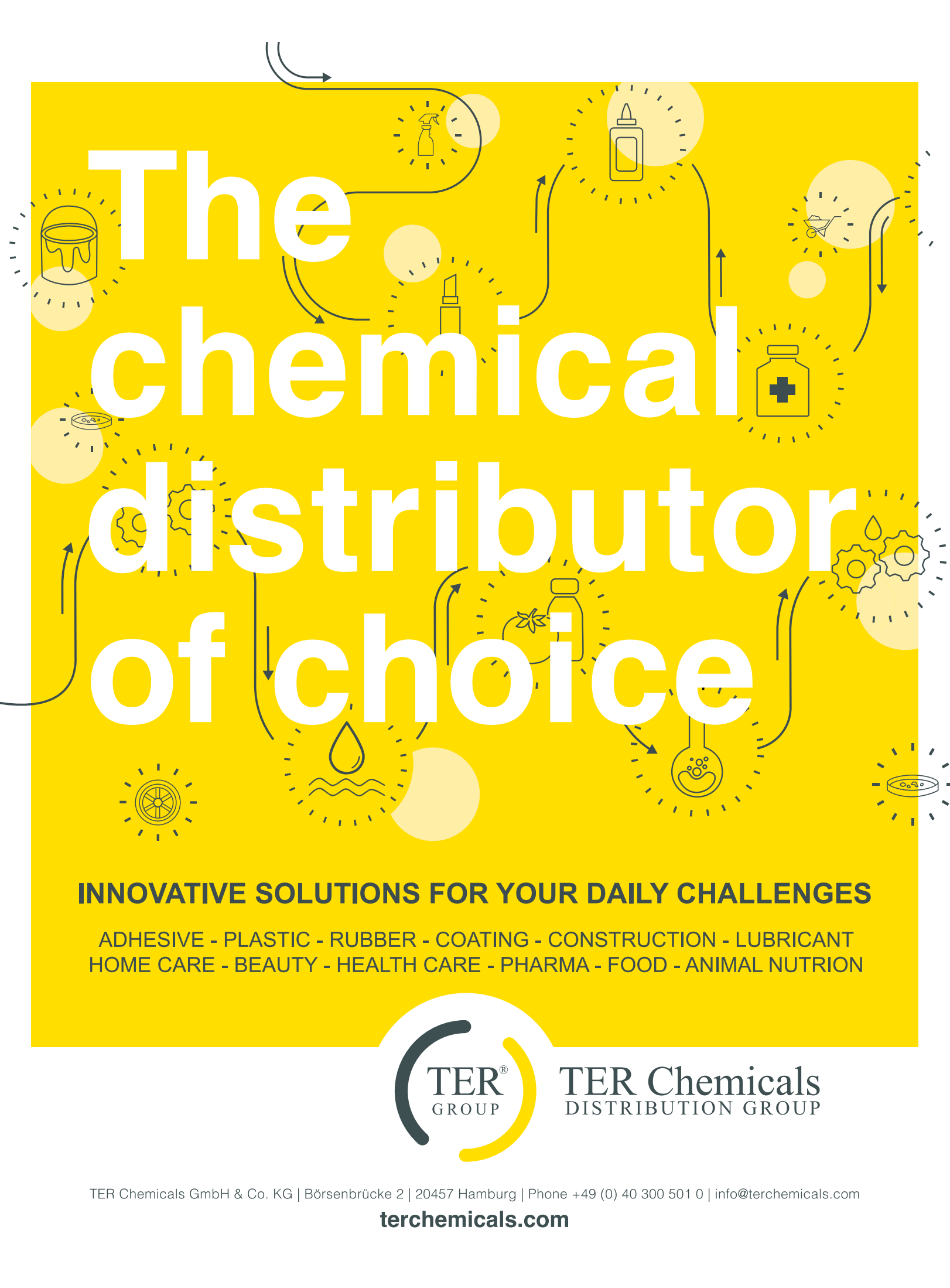
WILL & CO

2024 SALES: \$77.6M (€75M)

Badhoevedorp, Netherlands

www.will-co.eu

Managing Director: Jacques van Lindonk



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Europe chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
1	Brenntag*	6,585	32	Tennants Distribution	289.2	61	ECCEM (European Chemical Marketing)	162
2	HELM	2,187.1	33	HSH Chemie	284.2	62	Dolder Group	160.4
3	IMCD*	2,078.4	34	Cellmark	256.6	63	Atalant Europe	153.3
4	Univar Solutions*	2,064	35	Thommen-Furler Group	249	64	Atlantic Chemicals Trading	144.9
5	Tricon Energy	1,798.1	36	Norkem Holdings	244.8	65	Intermarc	144.9
6	Azelis	1,548.3	37	Telko	230.8	66	Stavian Chemical	142.3
7	OQEMA	1,500.8	38	COUNT Energy Distribution	225	67	Haefner Group	140
8	Biestfeld	1,180	39	Chem International (including Chem Trading)	217	68	Arpatis Benelux	136.6
9	Barentz	1,156.2	40	IMPAG Group	208.4	69	KH Chemicals	135.6
10	Kolmar Group	1,154	41	Julius Hoesch	206.3	70	Newport Industries	130.5
11	Vidara	995.7	42	2M Group of Companies	201	71	EXPLAST	126.3
12	Quimidroga	967.8	43	RAINOLDI	200.8	72	Moeller Chemie	125.2
13	Sojitz SOLVADIS	910	44	HARKE Group	196.8	73	Connect Chemicals	125
14	TER Group	835	45	Febo Group	196.7	74	Chimpex Industriale	123.2
15	Caldic	828	46	ProChema	194.6	75	Staub & Co - Silbermann	123.2
16	Safic-Alcan	801	47	Barcelonesa Group	193.6	76	Aug. Hedinger	120.1
17	Omya	661.6	48	Jebsen & Jessen Group	193.6	77	C.H. Erbsloeh	119.2
18	United Trading System (UTS/ETC)	563	49	NEO Chemical	192.3	78	Gadot Group	118.7
19	NAGASE & CO	544.4	50	Bang & Bonsomer	186.3	79	Chimitex	107.6
20	Polystylex	534.1	51	KTM	185.5	80	Penpet Petrochemical Trading	107.1
21	Nordmann, Rassmann	496.8	52	Grolman Group	185.3	81	ECHEMI Group	106
22	DKSH Performance Materials	480	53	Bodo Moeller Chemie	183.2	82	Merit Chemicals	105
23	Lehmann & Voss	408.8	54	Continental Industries Group	180	83	Novasol Chemicals Group	103.5
24	Eigenmann & Veronelli	377.8	55	Keyser & Mackay	176	84	Ilario Ormezzano	102.5
25	Arkem Kimya	354.3	56	ELTON	166.3	85	Airedale Group	99.7
26	Grupo RNM	351.9	57	Aegean First Company (AFCO)	165.6	86	SIDG (Lavallee)	94.2
27	Snetor	342	58	UCG (United Chemical Group)	164.7	87	URAI	93.2
28	Krahn Chemie	316.4	59	Plasmar	163.4	88	RAHN Group	92.3
29	Donauchem	314.7	60	Faravelli Group	162.1	89	Meade-King, Robinson & Co	90.4
30	Likit Kimya	297				90	HVL	88.5
31	Comercial Quimica Masso	292.8				91	MOGoil	83.3

Products: Coatings; chemicals; polyurethanes; PVC; plastics; food ingredients; personal care ingredients; home/industrial care ingredients

Services: Sales and marketing; storage management; logistics management

Trading sales: 5%

185

NATIONAL CHEMICAL

2024 SALES: \$77.1M (€74.5M)

Dublin, Ireland

www.ncc.ie

CEO: Alan Looney

Products: Specialty chemicals; food ingredients; technical polymers and compounds

Services: Full supply chain solutions including risk management; sourcing; accreditation; regulatory support; logistics and supply

Assets: ISO 13485 approved medical polymer compounding plant operated as JV Innovative Polymer Compounds

www.brainerdchemical.com

President: Brian Miller

Products: Peracetic acid; hydrofluoric acid; sulphuric acid; nitric acid; high hazard acids; formaldehyde; hydrogen peroxide; fluorine derivatives; refrigerants; aromatics; aliphatics; glycols; chlor-alkali; alcohols; food processing sanitation chemicals; water treatment chemicals

Services: Packaging; blending; manufacturing/engineering services; contract packaging; toll manufacturing; logistics services; warehousing; transloading

Assets: 6 production locations in Oklahoma, Illinois, North Carolina, Mississippi and Delaware; tank farms; rail terminals; extensive company owned truck, trailer, tanker fleet

187

COAST SOUTHWEST

2024 SALES: \$75.4M

Irving, Texas, US

www.coastsouthwest.com

President: Joseph C. Cimo

Products: Surfactants; silicones; functional specialties; anti-aging ingredients; preservatives; oleochemicals; lubricant additives

Services: Surfactant manufacturing; liquid blending; liquid bulk storage; packaging; transportation; formulation

Assets: 10 locations; 11 trucks; 3 laboratories

188

SAME CHEMICALS

2024 SALES: \$74.5M (€72M)

Barendrecht, Netherlands

www.samechemicals.com

Managing Director: Cees-Jan Crezee

Products: Acetates; acrylates; alcohols; anhydrides; aromatics; glycols; ketones; monomers; more chemicals

Services: Trading; mixing; packaging; market research; ISCC+ consultancy; REACH registration

Assets: Sales offices in the Netherlands, Denmark, Poland and Italy

Trading sales: 2%

189

MARMARA POLIMER

2024 SALES: \$74.2M

Istanbul, Turkey

www.marmarapolimer.com

President: Hayim Kandiyyoti

Products: Polypropylene; polyethylene; engi-

Europe chemical distribution leaders (2024 sales, \$m)

Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)	Rank	Company	Sales (\$m)
92	Wego Chemical Group	78.1	124	Jobachem	39.2	154	Kempro Kimyasal Maddeler	11
93	National Chemical Co	76.7	125	Sameca	36.2	155	Taj Al Mulook	10.6
94	Grupo ADI	76.6	126	Kemat	34.8	156	Bax Chemicals	9.6
95	Petrochem Middle East	76.6	127	Iberica Kemya	34.2	157	Quimica Mer	9.2
96	Will & Co	75.6	128	Comindex	33.6	158	Rotterdam Chemicals Group	7.2
97	Marmara Polimer	74.2	129	Shrieve Chemical	33.3	159	CHEMBROKER	7
98	Globe Chemicals	72.5	130	LUMAR QUIMICA	31.8	160	Foscote Group	6.1
99	Behn Meyer Group	72.5	131	Cornelius Group	31.6	161	Skystep Trading	5.7
100	SAME Chemicals	68.3	132	Biachem Group	31.3	162	Sunrise Group	5.6
101	Cor Quimica	62.7	133	GB-Chemie	30	163	KPL International	5.4
102	Fuchs Kimya	62.1	134	JABER	29.6	164	BassTech International	5.3
103	EMSA Tecnologia Quimica	61.3	135	MY-CHEM	29.5	165	El-Mohandes	5.2
104	Centro-Chem	61.1	136	Polyhimkomplekt-M	26	166	KLaus F. Meyer	5.1
105	Carbon Group	56.9	137	PROQUIP	25.4	167	Kempar Energy	5
106	Tilley Distribution	56.9	138	Lake Chemicals and Minerals	25	168	Belchem Solutions	4.6
107	Attilio Carmagnani	56.5	139	Sinochem Plastics	24.2	169	KLJ Resources	4.4
108	Antala	56.5	140	Symbase	23.6	170	Mitsubishi Shoji Chemical	3.8
109	Interpur Chemicals	53.3	141	Kadion	21.6	171	Hawkins	2.4
110	Interallis Holdings	51.2	142	Sapex Quimica	21.5	172	Transmare Chemie	2.3
111	Manuchar	50	143	Comercial Godo	20.2	173	Accord Chemical	2.3
112	CB Chemie	48	144	Simagchem Asia	20	174	Sanjay Chemicals India	2
113	ALYANS-ENERGIYA	47.8	145	Bloomchemag	19.8	175	Brisco	2
114	Solvachem	46.8	146	Stort Group	18.8	176	Cremer Erzkontor	1.2
115	WISTEMA	46.5	147	Luna Chemicals	18.6	177	The Chemical Company	1.2
116	Drogas Vigo	46	148	ELASTOQUIM	16.9	178	Rierden Chemical & Trading	1.1
117	A.+ E. Fischer-Chemie	45.5	149	Crismachem	15.1	179	Independent Chemical	1
118	DYM Resources	42.4	150	Laborspirit	14.5	180	CEMP	1
119	PHT International	42.1	151	Prakash Chemicals International	14.1	181	Rinchem	1
120	Stera Chemicals	41.4	152	DutCH2	13.7	*EMEA = Europe, Middle East & Africa Note: Sales are in the specific region and may differ from total company sales. Sales \$1m and above are included		
121	Eurosyn	41.2	153	BdV Behrens	12.7			
122	Kasakrom Chemicals	40.4						
123	SIP	40						

neering plastics; elastomers (SEBS; SBS); specialty chemicals

Services: Trading; storage; financing and FX hedging services to over 800 customers worldwide

Assets: Istanbul bonded warehouse; regular warehouse.

Trading sales: 50%

190

THE LEELA CORP

2024 SALES: \$70.1M

Ahmedabad, Gujarat, India

www.leelacorp.com

Managing Director: Ujas Patel

Products: Acids; basic chemicals; specialty chemicals; intermediates; agro commodities; excipients; active pharmaceutical ingredients

Services: Contract manufacturing; export

Assets: 1 head office; 1 corporate office; 3 branch offices; 1 manufacturing plant; 1 overseas branch office in US

Trading sales: 100%

191

EMSA TECNOLOGIA QUIMICA

2024 SALES: \$68.3M (€66M)

Barcelona, Spain

emsaquimica.com

CEO: Jorge Grima

Products: Melamine; chromium oxide; TiO₂; sodium and potassium hydroxides; epoxy resins; carbon black; ammonium chloride; sodium thiocyanate; copper sulphates and oxides; aromatic and aliphatic isocyanates; functional kaolin; naphthenic acid; RDPs; polycarboxylates; exosomes; ethoxylated alcohols and amines

Services: Technical advice; mixtures; compaction; addition; coatings; dissolutions; dispersions; repacking; saponification

Assets: 700 square meters of offices and laboratory; 5,000 square meters of warehouse; 1,000 square meters production plant

Trading sales: 35%

192

HENRY HIRSCHEN

2024 SALES: \$68.2M

Buenos Aires, Argentina

www.hirschen.com.ar

CEO: Miguel A. Hirschen

Products: Solvents; surfactants; oleochemicals; glycols; amines; ethoxylates; biocides; food ingredients; specialties

Services: Storage; trading; same day deliveries; financing; tailor made solutions

Assets: Central warehouse with tanks in Buenos Aires industrial area fit for liquids and solids with pharma/food secluded area

Trading sales: 3%

193

KEMPRO KIMYASAL MADDELER

2024 SALES: \$67.5M

Istanbul, Turkey

www.kempro.com.tr

President: Omer Saim Oguz

Products: Acrylic resins; polyester resins; polyurethane resins; polyisobutene; rubber; polyolefins; monomers; specialty solvents; additives; biocides; polycarbonate diols; polyurethane dispersions; grinding beads; cable compounds; specialty plastics; hydrocarbon and hydrogenated resins; isocyanates; polyalkylene glycols; pour point depressants; antioxidants; viscosity index improvers; elastomers

Services: Warehousing; formula development with own R&D; bulk storage; blending; repacking; tailor made manufacturing; toll manufacturing; application laboratories



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Assets: Warehouses; R&D laboratories; product development laboratories; application laboratories; Q&C laboratories
Trading sales: 10%

194

**PRAKASH CHEMICALS
PRIVATE LTD**
2024 SALES: \$63.4M

Vadodara, Gujarat, India

www.prakashchemicals.co.in

Managing Director: Chirag Shah

Products: Titanium dioxide; coating and construction additives; paper and coating binders; plastic additives; color chemicals; fumed silica and silanes; wet-end chemicals; waxes; home and personal care chemicals; adhesives; zinc derivatives; fatty acids; fatty alcohols; functional additives

Services: Sales and marketing; technical support; storage and warehousing; logistics; supply chain; sampling; just-in-time delivery; sourcing; market development; transportation

Assets: 2 offices; 6 warehouses; 4 tankers; 1 laboratory

195

CORQUIMICA
2024 SALES: \$62.7M (€60.6M)
Valdemoro, Madrid, Spain\

www.cor.es

CEO: Luis Javier Sanchez Cabrera

Products: Chemical products; solvents; thinner
Services: Trading

Assets: Warehouses; laboratories; trucks

196

WISTEMA
2024 SALES: \$62.4M (€60.3M)
Dielheim, Germany

www.wistema.de

General Manager: Lars Friedel

Products: Catalysts; chemical intermediates; cosmetics and personal care ingredients; food ingredients; industrial chemicals; pharmaceutical ingredients; plastic additives; polymers; solvents and distilled solvents; water treatment chemicals; waxes

Services: Storage; waste management (waste disposal certified); salvage recovery; REACH consultation; import and export administration

Assets: Warehouse; laboratory

Trading sales: 60%

197

ALAC INTERNATIONAL
2024 SALES: \$62.1M
New York, New York, US

www.alacinternational.com

CEO: Lily Frishman

198

FUCHSKIMYA
2024 SALES: \$62.1M (€60M)
Istanbul, Turkey

www.fuchs.com.tr

CEO: Oskar J. Fuchs

Products: Paints; coatings; inks; construction chemicals; polymers; engineering polymers
Services: Resins; additives; organic and inorganic pigments; colorants; polymers

Assets: Warehouses; trucks; headquarters building

Trading sales: 20%

199

CENTRO-CHEM
2024 SALES: \$61.3M
Lublin, Poland

www.centro-chem.pl

CEO: Piotr Mandziuk

Products: Glycerine; glycols; ethanolamines; alcohols; inorganic salts (sulphates, phosphates, nitrates, chlorides); EDTA and chelates; organic and inorganic acids; hydroxides; white oils and petroleum jelly; fertilizer raw materials; oleochemicals; solvents; feed additives and materials; cosmetic ingredients; food additives

Services: Warehousing; own transportation; drumming; packaging; sampling; quality control; regulatory support; global sourcing; export customs clearance on site (AEO); GMP+ FSA assured deliveries

Assets: 150+ employees; 3 offices; 3 warehouses; 2 bonded warehouses; own fleet of 15 trucks



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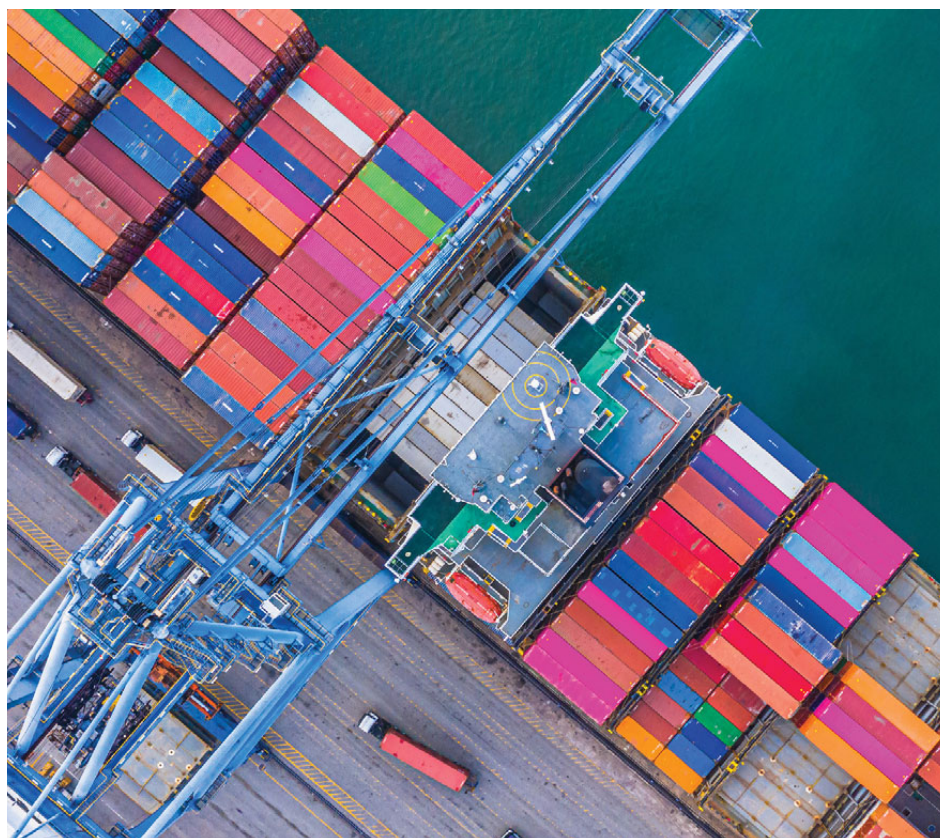


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thermoplastic; rubber additives; adhesives; waxes; flame retardants; disinfectants and sanitizers; pharmaceutical and nutraceutical ingredients; food ingredients; mineral and industrial acids; water treatment chemicals; pool and spa chemicals; janitorial and sanitation chemicals; industrial specialties; winter ice melting products

Services: Blending and compounding; logistics

Assets: 3 warehouses in Ontario, Quebec and British Columbia, Canada

206 CARBONO QUIMICA 2024 SALES: \$57.2M (R\$354M) Sao Bernardo do Campo, Sao

Paulo, Brazil

www.carbono.com.br

President: Vera Maria M. Gabriel

Products: Hydrocarbon solvents; dearomatized solvents; oxygenated solvents; glycols; acetates; epoxy resins; alkyd resins; paint additives; surfactants; estherquats; paint dryers

Services: logistics just-in-time; bulk storage; warehousing storage.

Assets: Self-owned trucks; bulk storage of 2,500 cubic meters at Sao Bernardo site; 150 cubic meters of bulk storage at South Branch; 1,000 tonnes of warehouse storage at Sao Bernardo HQ; fully equipped quality assurance laboratory; fully equipped development laboratory

207 CARBON GROUP 2024 SALES: \$56.9M (€55M) Cork, Ireland

www.carbon.ie

Managing Director: Brian Walsh

Products: Low chlorates alkalis; acids; solvents; food ingredients; chemical blends; engineering paints; pre-treatment chemicals; pharma and biopharmaceutical ingredients; alcohols

Services: Contract manufacturing; liquid and powder blending; warehousing; full supply chain; ISO 9001:2015, FSSC 22000 accredited manufacturing; laboratory services; COMAH regulated

Assets: 1 manufacturing site; 3 warehouse distribution sites across the British Isles; bulk solvent, acid and alkali on-site storage; dedicated ADR transport partners

Trading sales: 25%

208 ATTILIO CARMAGNANI 2024 SALES: \$56.5M (€54.6M) Genoa, Italy

carmagnani.com

President: Attilio Carmagnani

Products: Chemicals; naphtha solvents; aromatics; aliphatics; alcohols

Services: Logistics; chemical depot

Assets: Coastal terminal; depot; chemical laboratory

200 WALSH & ASSOCIATES 2024 SALES: \$61.1M Saint Louis, Missouri, US

www.walsh-assoc.com

President and CEO: Ellen M. Murphy

Products: Raw materials for CASE, HI&I, inks, personal care, oil and gas, agriculture, construction, food and beverage, metal working, pharma, plastics, green chemistry

Services: Manufacturing; blending; formulation assistance; technical assistance and EHS

Assets: 6 warehouse locations; 1 tractor trailer

Trading sales: 2.7%

201 RIERDEN CHEMICAL & TRADING 2024 SALES: \$60.5M Libertyville, Illinois, US

www.rierdenchemical.com

President: Joe Rierden

Products: Glycerine; fatty acids; fatty alcohols; maleic anhydride; potassium hydroxide; potassium carbonate

Services: Import; export; logistics – rail and truck; trading

Assets: Warehouses; railcars

Trading sales: 35%

202 AKTOPA 2024 SALES: \$60M Houston, Texas, US

www.aktopa.com

President: Jose S. Rodriguez

Products: Acrylates; glycol ethers; amines; esters; surfactants

203 UNITED MINERAL & CHEMICAL 2024 SALES: \$60M Lyndhurst, New Jersey, US

umccorp.com

President: Phil Befumo

Products: Pigments; additives for paints; additives for clean water; additives for construction; additives for food, beverage, nutritional; functional fillers for cosmetics; cosmetic additives; battery materials; deposition materials

Services: National distribution in the US; warehousing

204 UNITED CHEMICAL INTERNATIONAL 2024 SALES: \$60M South Carolina, US

www.ucichemical.com

President and CEO: David Tew

Products: Citric acid; xanthan gum; fumaric acid; phosphoric acid

Services: Procurement; warehousing; logistics; financing

Assets: Warehouses; trucks; tanks

Trading sales: 50%

205 MIN-CHEM/LAWRASON'S/CK INGREDIENTS GROUP 2024 SALES: \$58M Oakville, Ontario, Canada

www.min-chem.com

President: David A. Luciani

Products: Composite-thermoset; composite-



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209 **ANTALA**
2024 SALES: \$56.5M
Barcelona, Spain

www.antala.com

Director: A. Argudo

Products: Adhesives and sealants (epoxies, methacrylates, polyurethanes, silicones, SMP, anaerobics and cyanoacrylates); lubricants (greases, oils, AFC, compounds, pastes); electronic protection materials; coatings

Trading sales: 100%

210 **VECKRIDGE CHEMICAL**
2024 SALES: \$54.9M
Kearny, New Jersey, US

veckridgechemical.com

President: Robert Veca

Products: Industrial and specialty chemicals

211 **INTERPUR CHEMICALS**
2024 SALES: \$53.9M (€52.1M)
Barcelona, Spain

www.interpurchemicals.com

CEO: Oscar Garcia

Products: Polyols; isocyanates; flame retardants for PU; amine catalyst; metal catalyst; crosslinkers; chain extenders; PU additives; polyester for powder coatings

Services: Technical consultancy for PU and powder coatings

Assets: 8 warehouses in 5 different European countries

Trading sales: 5%

212 **BRISCO**
2024 SALES: \$53M
Sao Paulo, Brazil

www.brisco.com.br

CEO: Guillermo Castillo

Products: Styrene; polystyrene; EPS; ABS; PC; PP; PE; plasticizers; anhydrides; alcohols; acrylates

Services: Blending; agency; logistics

Assets: Own fleet; 2 warehouses; 1m LTS tanks

Trading sales: 40%

213 **BASSTECH INTERNATIONAL**
2024 SALES: \$52.3M
Fort Lee, New Jersey, US

basstechintl.com

CEO: Ben Gutmann

Products: Inorganic chemicals; specialty metals; waxes; byproducts of resins; CASE and specialty chemicals.

Services: Supply chain solutions; logistics; warehousing

Assets: Warehouses throughout North America and Europe; offices in the US, China, India and Europe

Trading sales: 2%

214 **RISHICHEM DISTRIBUTORS**
2024 SALES: \$51.6M
India

www.rishichem.com

Director: Arvind Kapoor

Products: Coatings; inks; adhesives; personal care ingredients; construction chemicals; plastics; paper release; food ingredients

Services: Imports; warehousing; logistics; customer support; in-house testing; inventory management; product sampling; technical assistance; marketing support

Assets: 5 warehouses; 2 sample warehouses; 1 technical application laboratory; branch offices;

Trading sales: 12%

215 **INTERALLIS HOLDINGS**
2024 SALES: \$51.2M (€49.5M)
Nicosia, Cyprus

www.interallis.com

President: Nikos Kazantzis

Products: Human nutrition; animal nutrition; personal and home care; coatings and construction; rubber and lubricants; agricultural supplies

Services: Product formulation; packing/re-packing; logistics; sampling; seed treatment

Trading sales: 51%

216 **DUTCH2**
2024 SALES: \$50.7M
Amsterdam, Netherlands

www.dutch2.com

CEO: Steven Willekes

Products: Acetates; acids; acrylates; alcohols; amines; aromatics; chlorinated solvents; glycol ethers; glycols; hydrocarbons; ketones;

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monomers; vegetable oils; propylene glycol ethers; plasticizers; specialty and performance chemicals

Services: Trading; export; drumming; warehousing; logistics; blending; packaging; storage; shipping.

Assets: Offices in Amsterdam, Houston, Shanghai, Dubai, Lima and Bogota

Trading sales: 20%

217

LEADERCHEM

2024 SALES: \$50M

Dubai, UAE

www.leaderchem.net

CEO: Hassan El Fil

Products: Raw industrial chemicals

Trading sales: 98%

218

RESEARCH SOLUTIONS GROUP

2024 SALES: \$50M

Pelham, Alabama, US

www.researchsolutionsgroup.com

CEO: Jeff Miller

Products: Alcohols; aromatics; aliphatics; glycols; glycol ethers; esters; ketones; solvent blends; specialty chemicals; lubricants; inorganics;

Services: Waste disposal; small bulk shipments; toll packaging; toll blending; rail/truck transloading; freight logistics; lab services

Assets: 5 warehouses, 200,000 square feet; 4 bulk terminals, 1.7m gal storage; 2 laboratories; 23 power units; 18 tank trailers; 16 van trailers

219

IDEAL CHEMICAL AND SUPPLY

2024 SALES: \$50M

Memphis, Tennessee, US

www.idealchemical.com

CEO: Sam Block

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 (dry and liquid); LTL and truckload quantities; single- and multi-compartment tanker deliveries; local warehousing and logistics; returnable and one-way containers; remote tank monitoring

Assets: three locations with combined 150,000+ square feet of warehouse space; 14 tractors; 22 trailers; 6 tankers; 1m gal liquid bulk storage; multiple sizes and styles of blend tanks; distilled spirits plant; in-house QC and R&D labs

220

CB CHEMIE

2024 SALES: \$48M (€46.4M)

Siegersdorf, Austria

www.cbchemie.at

President and CEO: Christian Braunschier

Products: Thickeners; binders; pigments and preparations; metal soaps; multifunctional additives; specialty phosphates; SBS co-polymers; cellulose ethers

Services: Development of solutions; techni-

cal support; product research; vendor management; storage; repacking to cover the whole logistics chain

Assets: Warehouse; quality lab and R&D center; refilling station

221

ALYANS-ENERGIYA

2024 SALES: \$47.8M

Moscow, Russia

alliance777.com

CEO: Sergei Baranov

Products: Surfactants; waxes; conditioning polymers; opacifiers; hair fixatives; preservatives; silicones; pH regulator; active additives; emulsifiers; emollients; thickeners; complexing agents; oxidizing agents; alkaline components; bleaching agents; solvents; cleaners; corrosion inhibitors; solubilizers; silicones; ingredients for make-up; moisturizers; thickeners; film-formers and rheology; modifiers; active ingredients and vitamins; mixtures and cosmetic bases; waxes; UV filters

Services: Trading of commodities; warehousing; own custom declaration service; business financing; logistics; technical support

Assets: 18 warehouses within Russia; 6 sales offices

222

JOBACHEM

2024 SALES: \$47.2M

Dassel, Germany

www.jobachem.com

CEO: Julian Kahl

Products: Plasticizers; specialty chemicals;



UV curing agents; flavors and fragrances

Services: Storing; mixing; heating

Trading sales: 90%

223 SOLVACHEM
2024 SALES: \$46.8M
Wroclaw, Poland

www.solvachem.com

CEO: Elisabeth Luerenbaum

Products: Methanol; alcohols and other solvents; regenerated solvents; PIA; PTA; MTBE; technical gases and aerosols; polymers; base oils; acids; AdBlue; organic and inorganic chemicals; oils and greases; used cooking oil (UCO); mineral functional fillers; pigments; biocides; defoamers; plasticizers; washing agents and disinfectants; fillers and additives for coatings and construction

Services: Logistics

Assets: 1 methanol tank; 5 warehouses; 2 custom warehouses; production facilities (washing agents and disinfectants)

Trading sales: 30%

224 TZ GROUP
2024 SALES: \$46.2M
Houston, Texas, US

www.tzgroupusa.com

President: Fernando J. Zavala

Products: Acetic acid; formic acid; nitric acid; phosphoric acid; caustic soda; soda ash; sodium bicarbonate; calcium chloride; calcium hypochlorite; HCl; sulfuric acid; sodium hypochlorite;

Services: Transportation; storage and packaging of hazard materials

Assets: 6 warehouses in Mexico with tanks, drumming stations and dry storage; 1 warehouse in the US; 35 trucks for deliveries

225 A.+E. FISCHER-CHEMIE
2024 SALES: \$46.1M (€44.5M)
Wiesbaden, Germany

www.fischer-chemie.de

CEO: Manuel Fischer-Bothof

Products: Caustic soda; solvents; hydrochloric acid; citric acid; urea; phosphoric acid; matting agents; pyrogenic silicon dioxide; precipitated silica; silicone oil; glycerine; caustic potash; sodium bicarbonate; hydrogen peroxide; activated carbon; sodium persulfate

Services: Storage; packaging; mixing; exporting

Assets: Warehouses for solid and liquid products; 16 trucks

Trading sales: 10%

226 INDEPENDENT CHEMICAL
2024 SALES: \$46M
Glendale, New York, US

www.independentchemical.com

President and CEO: Jonathan Spielman

Products: Surfactants; pharma excipients;



cosmetic specialties; detergent specialties; acids; alkalies; oxidizers

Services: Food grade and industrial packaging; powder and liquid blending; global logistics

Assets: Warehouse; applications laboratories; 4 tankers; 5 trailers

Trading sales: 5%

227 DROGAS VIGO
2024 SALES: \$46M
Porrino, Pontevedra, Spain

www.drovi.com

CEO: Enrique Casal Lareo

Products: Solvents; inorganics; resins; food ingredients; blends

Services: Blending; solvents recycling; chemical and physical analysis; storage

Assets: Warehouse in Porrino; warehouse in Aveiro; fully equipped lab; fleet with 8 trucks

Trading sales: 5%

228 VIVION
2024 SALES: \$45M
Fort Worth, Texas, US

www.vivion.com

CEO: Declan McLaughlin

Products: Nutraceuticals; food and beverage ingredients; cosmetic and personal care ingredients; industrial and agricultural chemicals

Services: Formulation; blending

229 DYM RESOURCES
2024 SALES: \$42.4M (€41M)
Berlin, Germany

dymresources.com

Managing Director: Denis Varaksin

Products: Base oils Group I, II and III; re-refined base oils; Group V base oils; naphthenic and paraffinic base oils; PAO; esters; viscosity modifiers; additives

Services: Logistics; financing; consulting

230 CORNELIUS GROUP
2024 SALES: \$41.7M (€33.3M)
Bishops Cleeve, UK

www.cornelius.co.uk

CEO: Phillip Gibbons

Products: Pigments; resins; additives; specialty chemicals; ocular monomers; waxes; vanilla; silica; silicones; polyesters; fragrance; oils; natural products

Services: Warehousing; sampling; regulatory services; manufacturing; R&D; QC; sales; marketing

Assets: Warehouses; offices; formulation laboratories; R&D laboratories; QC laboratories; chemical manufacturing plant

231 STERA CHEMICALS
2024 SALES: \$41.4M (€40M)
Jilava, Bucharest, Romania

www.sterachemicals.ro

CEO: Alecsandru Rasidescu

Products: Biocides; solvents; glycols; resins; pigments; surfactants; fragrances; emulsifiers; emollients

Services: Mixing; blending; drumming; consulting



Assets: Warehouse; laboratory; trucks
Trading sales: 10%

232 EUROSYN
2024 SALES: \$41.2M (€39.8M)
Milan, Italy

www.eurosyn.it

CEO: Enrico Campana

Products: Specialty chemicals for homecare and I&I, disinfectants, textile and leather auxiliaries, metal working, personal care and cosmetics, health and nutrition, paints and coatings, inks, composites, adhesives, construction

Services: Technical and regulatory support; logistics; bulk storing and bulk breaking

Assets: Warehouse; lab; tank farm; filling stations

233 SULATLANTICA
2024 SALES: \$40.9M
Rio de Janeiro, Brazil

www.sulatlantica.com.br

President: Mario Grumach

Products: Chemicals for oil and gas, mining, glass, agriculture, food and feed industries (organic chemicals, inorganic chemicals, solvents, emulsifiers, viscosifiers, chelants)

Services: Importing; exporting; packaging; blending; transportation; storage

Assets: 4 warehouses; 25 tanks; 1 office building

234 COLORMIX ESPECIALIDADES
2024 SALES: \$40.8M
Sao Paulo, Brazil

colormix.net.br

CEO: Carlos Fernando de Abreu

Products: Wetting and dispersing additives; rheological additives; effect pigments; natural actives and ingredients; organic pigments; inorganic pigments; pigment dispersions; functional fillers; green carbon black; amino surfactants; ingredients from renewable sources; microfibrillated cellulose; natural preservatives; vegetable oils; additives for plastics; encapsulated actives

Services: Specialized technical and commercial support; high-performance logistics; re-packaging; fractionation; indent sales; guaranteed deliveries in 24 hours

Assets: 90 days of average stock for the market; national presence with specialized team; sample room; water-based dispersion plant; application laboratories; warehouses; controlled fractionation rooms

Trading sales: 5%

235 KASAKROM CHEMICALS
2024 SALES: \$40.4M (€39M)
Bucharest, Romania

www.kasakrom.com

General Manager: Cristian Andrei

Products: PE; PP; PET; PVC; PS; EPS; filler; ABS; EVA; PA; bioplastic compounds

Services: Personalized solutions; full technical expertise; business consulting; direct and warehouse distribution; global sourcing; logistics

Assets: Experienced sales team; large warehouse network in Romania

236 SIP
2024 SALES: \$40M
London, UK

www.sip.com

Managing Director: Frank Colcord

Products: Medicinal white oils; drilling base fluids; premium industrial oils; process oils; specialty fluids; additives; environmentally acceptable base oils

Services: Formulation; technical support; regulatory support; storage; logistics; blending; packaging;

Assets: Warehouses, blending and storage facilities in UK and EU

Trading sales: 20%

237 LINKERS CHEMICALS AND POLYMERS
2024 SALES: \$39.8M

Dubai, UAE

www.lcp.ae

CEO: Malik Pervez Zaman

Products: Synthetic rubber; PVC; engineering plastics; plasticizers; latex; monomers; construction chemicals; animal nutrition; coatings chemicals

Services: Market expansion; technical; financial and supply chain management

Trading sales: 100%

238 FOSCOTE GROUP
2024 SALES: \$39.7M
Limassol, Cyprus

www.foscote.net

Director: Yulia Avraam

Products: Acrylates; methacrylates; monomers; glycols; plasticizers; acetates; caustic soda; ethanolamines; ketones; oxo-alcohols; solvents; phthalic anhydride; maleic anhydride; potassium hydroxide

Services: Diversified product portfolio; quality assurance; logistics solutions; financing; storage; customer support

Trading sales: 80%

239

VAN HORN, METZ & CO

2024 SALES: \$39M

Conshohocken, Pennsylvania, US

www.vanhornmetz.com

President and CEO: Barry Fisher

Products: Resins; additives; pigments; minerals; organic specialties

Services: Consultative selling; global sourcing; local warehousing

Trading sales: 35%

240

PRODUCERS CHEMICAL

2024 SALES: \$38.5M

Sugar Grove, Illinois, US

www.producerschemical.com

President: Jeff Szklarek

Products: Acids; alcohols; aliphatics; amines; aromatics; chlor-alkali; esters; glycerine; glycols; glycol ethers; ketones; phosphates; plasticizers; printing solutions; surfactants; VOC exempt solvents

Services: Custom blending; contract packaging; bulk and mini bulk delivery; import sourcing; USP packaging; waste disposal

Assets: 2 warehouses with 58,000 square feet of storage; 174,000 gal bulk storage; 10 trucks

Trading sales: 5%

241

MORAIS DE CASTRO

2024 SALES: \$38.4M (R237.8M)

Salvador, Bahia, Brazil

www.moraisdecastro.com.br

President: Andre G. de Castro

Products: Food ingredients and flavors; oil and gas chemicals; personal care additives; paints and coatings additives; rheology modifiers; biocides; silicones; surfactants; glycols; mineral oils; acids and bases; phosphates; solvents; filter aids; adsorbents

Services: Packaging and repackaging; storage; dilutions; imports (under contract); transportation

Assets: Warehouses (Bahia; Pernambuco and Sao Paulo); trucks; storage tanks; laboratories (quality control and application); packaging/repackaging facilities (with white room)

242

R.E. CARROLL

2024 SALES: \$38M

Ewing, New Jersey, US

www.recarroll.com

President: 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 (New Jersey); warehouses in California, Ohio, Georgia, Illinois, Texas; capacity to efficiently repackage 6,000-12,000 gal/week at several locations for aromatic, naphthenic, paraffinic base and process oils

243

KEMAT

2024 SALES: \$37.7M (€36.4M)

Brussels, Belgium

www.kematbelgium.com

Managing Director: Simon Mason

Products: Low molecular weight (MW) conventional polybutenes; low MW high reactive polyisobutenes; proprietary PIB emulsions; polyisobutene succinic anhydride; medium and high MW polyisobutenes; polybutenes and polyisobutenes with customer specific MW and viscosity; tailor made blends of polybutenes and base oils; proprietary solvent blends for cleaning and removing PIB spills; PAO and MPAO; tacky additive for mineral oil-based lubricants; castor and linseed/flaxseed oil; molybdenum disulphide; 12-HSA; amorphous PAO copolymer; ethylene-propylene oligomer liquid polymer

Services: Blending; bulk storage; drumming; outsourcing; packing; repacking; sourcing; warehousing

Assets: 100x ISO containers; warehouses

with drumming, blending and repacking capability; 5 offices globally; internal laboratory; transport fleet

Trading sales: 5%

244

SAMECA

2024 SALES: \$36.2M (€35M)

Porto, Portugal

samecapq.com

CEO: Mario Jorge Silva

Products: Solvents; organic and inorganic chemicals; resins and emulsions; synthetic and natural-based pigments and fillers; yeasts; starches; preservatives and other food ingredients; barrels and polymer-based cubes; surfactants; aloe vera-based additives; silicones; bio-based polymers; polyurethane systems; expanded and crystal polystyrene; additives for rubber processing

Services: Commodities and specialties distribution; technical support; sourcing; storage; packaging; blending; logistics; imports and exports; trading

Assets: Headquarters in Porto and Barcelona; offices in Lisbon and Vigo; warehouses at Porto, Barcelona and Valencia; own fleet of 7 trucks

Trading sales: 25%

245

PQA - PRODUTOS QUIMICOS

ARACRUZ

2024 SALES: \$35.6M (R220M)

Aracruz, Espirito Santo, Brazil

www.pqa.com.br

CEO: Carlos Raimundo de Andrade Costa Pinto

Products: Sodium dichloroisocyanurate; so-



dium trichloroisocyanurate; sodium hypochlorite; calcium hypochlorite; sodium hydroxide; fluorosilicic acid; hydrochloric acid; citric acid; phosphoric acid; soda ash; cyclohexane; magnesium oxide; polymers; hydrogen peroxide; sodium bicarbonate; sanitation, and hygiene chemicals; healthcare ingredients; agrochemicals; food ingredients; sugars and alcohols; cosmetics ingredients; oil and refining chemicals; pulp and paper chemicals

Assets: Warehouses; truck; semi-trailer truck
Trading sales: 15%

246 ROYALE GROUP (AWSM INDUSTRIES, ROYALE PIGMENTS & CHEMICALS, SHORECHEM, AWSM SOLUTIONS)
2024 SALES: \$35M

Bear, Delaware, US

[royalepigments-chem.com](https://www.royalepigments-chem.com)

CEO: John Logue

Products: Alkalis; fluoroborates; fluorides; metal fluoroborates; nitrites; borates; ACS grades; specialty organics and inorganics

Services: Sourcing and supply chain management; transportation; warehousing; packaging; contract and specialty manufacturing

Assets: 2 manufacturing plants; 5 warehouse locations

247 SEELER HOLDINGS
2024 SALES: \$35M

Joliet, Illinois, US

www.seeler.com

CEO: Steve Seeler

Products: Hydrogen peroxide; peracetic acid; acetic acid; sodium percarbonate; manganous oxide; glycerine; propylene glycol; sodium sul-

fate anhydrous; malic acid; sodium chlorate; caustic soda; white oil; DDBSA citric acid

Services: Toll manufacturing; transloading; dry packaging; liquid packaging; tank storage; logistics; laboratory services; rail storage

Assets: Tank storage; warehouses; laboratory; independent truck and trailer fleet; rail; blending tanks

248 CHAMPION SPECIALTY CHEMICALS
2024 SALES: \$35M

Mumbai, India

www.championchemicals.com

CEO: Gaurav Singhania

Products: Additives; emulsions; flame retardants; polymer powders; cellulose ethers; matting agents; coalescing agents; silanes; photo-initiators; isocyanates; silica; acrylate monomers

Services: Application testing; formulations; warehousing; market survey

Assets: Offices; warehouses; laboratories

249 COMINDEX
2024 SALES: \$34.7M (€33.5M)

Montornes del Valles, Barcelona, Spain

www.comindex.es

General Manager: Ana-Cristina Arp

Products: Additives; acrylic dispersions; alkyd emulsions; biosolvents; castor and linseed oil and derivatives; corrosion inhibitors; epoxy resins and reactive diluents; flame retardants; fumed silica; hollow glass microspheres; matting agents; molecular sieves; pigments; polyols; probiotics; PU and UV curable dispersions; solvent-borne resins.

Services: Technical assessment; technical vis-

its with our principals; free customer training; free samples shipment; local warehousing

Assets: 1 headquarters; 1 warehouse

Trading sales: 43%

250 IBERICA KEMYA
2024 SALES: \$34.2M (€33M)

Seville, Spain

www.iberkemya.com

Co-Owner: Damian Santiburio Juan

Products: Inorganics; general chemicals

Assets: Iberian trade office

Trading sales: 100%

251 LUMAR QUIMICA
2024 SALES: \$31.8M (€30.7M)

Barcelona, Spain

www.lumarquimica.com

CEO/Owner: Lluís Ribera

Products: Synthetic lube bases (G-II; G-III; PAO; esters; PAG; PIB; silicones; phosphate esters; PFPE); lubricant additives (AW/EP, antioxidants, corrosion inhibitors, VII, PPD, surfactants, sulphates; antifoam, thickeners); amines; fatty acids/alcohols; antifreeze ingredients

Services: R&D; storage; logistics; repackaging; analysis; technical training

Trading sales: 5%

252 BIACHEM GROUP
2024 SALES: \$31.3M (€25M)

London, UK

www.biachem.com

Managing Director: Bob Beaumont

Products: Caustic soda; soda ash; sodium percarbonate; sulphamic acid; chlorine; chelates; surfactants; salt; phosphates; phosphoric acid; magnesium chloride; potassium chloride; sulphites



Services: Repacking; mixing; dilutions
Trading sales: 5%

253 GB-CHEMIE
2024 SALES: \$30M (€29M)

Messel, Germany

www.gb-chemie.com

Managing Director: Dirk Forler

Products: Specialty chemicals; lubricants additives; amines; starch derivatives; oxo alcohols; bromine derivatives; phosphorus compounds; inorganics

Services: Warehousing and storage; sourcing; technical service

Assets: 3 offices

Trading sales: 10%

254 CJ CHEMICALS
2024 SALES: \$30M

Howell, Michigan, US

www.cjchemicals.net

CEO: Catherine Lee

Products: Adhesives; coatings; construction chemicals; aerospace materials; agriculture chemicals; automotive and transportation chemicals; food nutrition and flavorings; heat transfer fluids; home industrial and institutional care chemicals; metalworking fluids and lubricants; personal care and pharmaceutical ingredients; pulp and paper chemicals; specialty chemicals; water treatment chemicals

Services: Warehousing and storage; shipping; import/export; lab capabilities

Assets: Office equipment; inventory

255 SEACOLE
2024 SALES: \$30M

Plymouth, Minnesota, US

www.seacole.com

CEO/President: Gregg Elliott/John Bell

Products: contract blending / packaging; surface finishing; printed circuit board chemistry; industrial cleaning; agricultural; microelectronic; medical device

Services: Contract blending/packaging (liquid and powder); private label packaging; ISO 9001-2015; Responsible Distribution, EPA, DEA, FDA (level 1)

Assets: 90,000 square foot warehouse; manufacturing plant; R&D and QC laboratory; clean room; flammable room; hot room; cool room; delivery truck

Trading sales: 50%

256 JABER
2024 SALES: \$29.6M (€28.6M)

Madrid, Spain

www.jabersa.com

CEOs: Javier Jimenez, Joaquín Jiménez

Products: Solvents and thinners; hydrocarbons; acetates; ketones; ethers; glycol ethers; alcohols; mixtures with ethanol; chlorinated solvents; inorganics; resins; silicones; surfactants; white oils; flavors and fragrances



Services: Custom blending; custom packaging; food grade packaging; transportation (bulk and package); waste management; analysis and laboratory services

Assets: Warehouses in Mostoles (Madrid) and Almansa (Albacete) with 14,000 square meters for packaged products and manufacturing; 65 storage tanks with capacity of 1,800 cubic meters; 2 solvents recycling units; quality control laboratory

257 MY-CHEM
2024 SALES: \$29.5M (€28.5M)

Buchholz, Germany

www.my-chem.de

Owner: Ralf Meinecke

Products: Phthalic anhydride; maleic anhydride; paraformaldehyde; pentaerythritol; dipentaerythritol; styrene; purified isophthalic acid; purified terephthalic acid; trimellitic anhydride; fumaric acid; tall oil products; glycols; heat transfer fluids

Services: Trading

258 ALCHEMY
2024 SALES: \$29.1M

Hong Kong, China

www.alchemy-ltd.com

Commercial Director, Operation Director: Ankit Manek, Krupali Manek

Products: Raw materials for paints and inks, plastics and rubber, food and beverages, cosmetics and personal care, soaps and detergents, foam

Trading sales: 100%

259 SIMAGCHEM ASIA
2024 SALES: \$29M

Singapore

www.simagchem.com

Managing Director: Wang Shaobo

Products: Petrochemicals; fine chemicals; pharma chemicals

Services: Sourcing; trading; custom manufacturing

Assets: Production sites in China

Trading sales: 100%

260 LAKE CHEMICALS AND MINERALS
2024 SALES: \$28.8M (€23M)

Redditch, UK

www.lakecm.co.uk

Managing Director: Steven Cartledge

Products: Industrial fluid additives; coatings additives; polymer additives; fine chemicals; pharmaceutical excipients; custom synthesis molecules; food supplements; food staples; cosmetics ingredients; agrochemicals; water treatment chemicals

Services: Technical selling; application development; R&D; agile manufacturing; raw material sourcing; powder and liquid blending; repackaging; strategic insights

Assets: R&D laboratories; manufacturing facilities; warehouses

261 GJ CHEMICAL
2024 SALES: \$27.5M

Somerset, New Jersey, US

www.gjchemical.com

President: Diana Colonna

Products: Acrylate monomers; plasticizers; reagents; high purity solvents; ACS/USP/NF/HPLC

Services: Testing; bulk storage; repackaging; liquid bulk handling; custom blending; purifying; stabilizing

Assets: 3 locations in New Jersey; 8 trucks; 25 tankers; 15 box trucks; USP filling room

Trading sales: 50%

262

PROQUIP

2024 SALES: \$26.4M (€25.5M)

Vilanova del Camoi, Spain

www.proquipsa.com

CEOs: Jordi Pijoan Queralto, Marta Pijuan Queralto

Products: Sulfuric acid; caustic soda; hydrogen peroxide; sodium; mimosa; chromium III; sodium sulphide; isopropanol; methanol; formic acid; phosphoric acid; hypochlorite; hydrochloric acid; peracetic acid; lactic acid

Services: Design of formulas; manufacturing of solid and liquid products; dilutions; packaging; technical advice; recovery and reuse of packaging

Assets: 30,000 square meters of storage and offices; over 60 tanks for liquid chemicals; quality department; technical-commercial team with an in-house laboratory for wastewater treatment and tannery; QC and R&D laboratory; bottling line for jerry cans; 4 silos for solid product manufacturing; 5 reactors

for liquid product production; production plant for vitamin K3 and liquid chromium; transportation fleet of 11 trucks

Trading sales: 10%

263

POLYHIMKOMPLEKT-M

2024 SALES: \$26M

Moscow, Russia

phkomp-m.ru

Managing Director: Stanislav Zhilich

Products: Dispersions; epoxy resins and hardeners; fillers; pigments; coalescents; rheological additives; biocides; antifoams; dispersants; thickeners; PVC; functional additives for plastics; polyisocyanates; anticorrosive resins and pigments

Services: Warehousing; transportation by own trucks

Assets: 7 outsourced warehouses; two trucks; biolab

264

GULF COAST CHEMICAL

2024 SALES: \$25.3M

Abbeville, Louisiana, US

gulfcoastchemical.com

CEO/Owner: Jim Fusilier

Products: Glycols; methanol; coolants; lubricants; antifreeze; scavengers; production chemicals; heat transfer fluids

Services: Laboratory services; blending; chemical treatment and associated field services

Assets: Company owned and operated facilities; bulk methanol terminal for offshore ser-

vice; 120,000 square feet of warehouse storage; 600,000+ gal of liquid storage tanks; laboratory facility; 23 delivery trucks; 4 tankers; 4 flat bed trailers; 5 tractors; 4 field service trucks

Trading sales: 3%

265

S. KUSHALCHAND

2024 SALES: \$25M (RS.2.143BN)

Mumbai, Maharashtra, India

skushalchand.com

Executive Director: Prasad Pawar

Products: Food and beverage ingredients; flavors and fragrance specialties; personal care ingredients; nutraceuticals; coatings and adhesives; pharma ingredients; cleaning solutions and green solvents

Services: Processing of orders; standard packaging and transportation; customs and import services; inventory management; tracking; planning of logistics and reverse logistics

Assets: 102 years of distribution experience; 24 principals; 650+ customers in 175 cities; 575+ products on shelf; 350+ tonnes average stocks; 675+ products offered; 25,000+ square feet of in-house warehousing space; imports from 4 continents and 15+ countries

Trading sales: 50%

266

SERVOCHEM

2024 SALES: \$25M

Dubai, UAE

www.servochem.com



Managing Director and CEO: Suresh Dodani
Products: Specialty chemicals for water treatment, oil and gas; solvents (alcohols, amines, glycols, glycol ethers, hydrocarbons, ketones)

Services: Toll blending; product packaging; custom blending; private labeling; storage and transportation

Assets: Warehouse; blending plant; reactors; bulk storage tanks; racking system; articulate forklift; weigh bridge; chiller; boiler; trucks

Trading sales: 40%

267

RISHICHEM MIDEAST

2024 SALES: \$24.3M

Dubai

www.rishichem.ae

Director: Arvind Kapoor

Products: Chemicals for personal care, coatings, construction, plastics, paper, rubber

Services: Imports; warehousing; logistics; customer support; in-house testing; inventory management; product sampling; technical assistance; marketing support

Assets: 2 warehouses; 1 sample warehouse; 1 technical application laboratory

Trading sales: 3%

268

SYMBASE

2024 SALES: \$23.6M

Poznan, Poland

www.symbase-group.com

CEO: Klaudiusz Dominiak

Products: Cellulose ethers; tartaric acid; SBS and NBR; vinyl acetate-ethylene redispersible powders (VAE); EPDM; chloroprene; titanium dioxide; self-leveling additives; hydrophobic impregnates

Services: Advanced R&D projects; formulations; logistics; blending; trading; sourcing of specialties; storage

Assets: R&D center and headquarters (office and warehouse)

Trading sales: 5%

269

BAX CHEMICALS

2024 SALES: \$23.5M (€22.7M)

Obdam, Netherlands

baxchemicals.com

Owner: Barend-Jan Bankras

Products: Glycol ethers; acetates; hydrocarbons; ketones; acids; aromatics; acrylates; alcohols

Services: Drums; IBCs; ISOs; truck; bulk; customer specifics

Trading sales: 82%

270

KADION

2024 SALES: \$22.6M (€21.8M)

Barcelona, Spain

www.kadion.com

CEO: Joaquim Guilera

Products: Organic pigments; inorganic pigments; solvent dyes; metallic pigments; pear-



lescent pigments; pigments; additives; epoxy resins; nitrocellulose resin; resins

Trading sales: 8%

271

ROTTERDAM CHEMICALS GROUP

2024 SALES: \$21.7M (€21M)

Rotterdam, Netherlands

www.rotterdamchemicals.com

Owners and CEOs: Elijan Buchbot, Rick Kok

Products: Acetates; acids; alcohols; aromatics; chlorinated solvents; glycols; industrial chemicals; ketones; monomers; thinners

Services: Trading; blending; sourcing; warehousing

Assets: Agencies for European market; warehouse in Rotterdam

Trading sales: 60%

272

SAPEC QUIMICA

2024 SALES: \$21.5M (€20.8M)

Setubal, Portugal

www.sapecquimica.pt

CEO, Managing Director: Antonio Marques, Carla Soares

Products: Chemicals for water and wastewater treatment, pulp and paper, industrial applications, food, cosmetics, personal care, home care, paints and coatings, rubber and polymers, waxes and paraffins, resins and agglomerates, textiles, glass and ceramics

Services: Rental of large tanks for liquid bulk

Assets: Tank farm with 36 tanks for solvents; 2 warehouses with a total area of 5,240 square meters and space to store 2,840 pallets; 4

large tanks with a total capacity of 10,600 cubic meters; laboratory and available area of 1.5 hectares

273

BLOOMCHEMAG

2024 SALES: \$20.8M (€20.1M)

Mol, Belgium

www.bloomchemag.com

CEO: Rajesh Sethi

Products: Methoxy propyl acetate (PMA); butyl acrylate; propylene carbonate; butyl acetate (butac); triacetin; methyl methacrylate (MMA); 2-hydroxyethyl methacrylate (2-HEMA); acrylic acid; benzyl alcohol; methoxy propanol (PM); phthalic anhydride; propylene glycol (MPG); dibasic ester (DBE); molten maleic anhydride; ethyl acetate (etac)

Services: Imports; storage and distribution of Asia-origin specialty chemicals; bulk and packed warehousing; door-step deliveries in EU and UK

Assets: 3 fully-owned corporate and annex offices in Noida, India with 5,400 square feet

Trading sales: 5%

274

COMERICAL GODO

2024 SALES: \$20.7M (€20M)

Igualada, Barcelona, Spain

www.comercialgodo.com

CEO: Xavier Bustos Ruiz

Services: Alkalis; acids; peroxides; chemical raw materials; AdBlue; AUS40

Assets: 4 warehouses; 1 laboratory; 8 trucks; 2 tank trucks; 3,600 cubic meters of tanks;



18,000 square meters for solids; 15,000 square meters Seveso facilities
Trading sales: 80%

275

SAIPER CHEMICALS

2024 SALES: \$20.5M (RS1.76BN)

Mumbai, India

www.saiper.com

Director: IBV Raghavan

Products: Additives (amine neutralizers, wetting agents); ethanalamines; C4 derivatives; fragrance intermediates and ingredients; P series glycol ethers; propylene glycols; pine oil derivatives (TOR, TOFA, rosin esters and rosin ester emulsions); surfactants

Services: Technical sales; marketing of specialty chemicals and ingredients; local stock holding; drumming; repackaging; sampling

Trading sales: 10%

276

SCHIBLEY SOLVENTS & CHEMICALS

2024 SALES: \$20M

Elyria, Ohio, US

www.schibley.com

President: Reed Schibley

Products: Organic peroxide initiators; chelates; fatty acids; surfactants; mercaptans; stearates; persulfates; solvents; UPR resins; fiberglass reinforcements; gelcoats and release agents

Services: Trucking; storage; packaging;

warehousing; technical support

Assets: 4 climate controlled warehouses; refrigerated hazardous materials storage; 3 tractor trailers; back-up generators with fire suppression systems

Trading sales: 5%

277

STORT GROUP

2024 SALES: \$18.8M (£15M)

Bishops Cleeve, UK

www.stortgroup.com

Group CEO: Richard Gilkes

Products: Specialty raw materials for coatings and allied industries; colorants for paint tinting systems; natural and synthetic raw materials for flavors and fragrances

Services: Technical sales; sampling; logistics

Trading sales: 5%

278

LUNA CHEMICALS

2024 SALES: \$18.6M (€18M)

Zwaag, Netherlands

www.rlggroup.co.uk

Director: Raman Goyal

Products: Acetic acid; anhydrides; ethyl acetate; pure isothalic acid; purified terephthalic acid; MIBK; benzyl alcohol; acetone; IPA; butyl acrylate

Services: Trading

Assets: Warehouse

Trading sales: 100%

270

FLOSAN

2024 SALES: \$18M

Guatemala

flosan.com.gt

Director: Julio Godoy

Products: Active pharmaceutical ingredients; chemical specialties for personal/home care; fragrances

Services: Distribution and indent sales; R&D support

Assets: Warehouses in Guatemala, El Salvador and Costa Rica; own truck fleet; R&D laboratory for personal care

Trading sales: 20%

280

INMOTION CHEMICALS

2024 SALES: \$18M

Aventura, Florida, US

www.inmochem.com

General Manager: Paola Isaza

Products: Detergents; paints; solvents; food ingredients; polyurethanes; feed ingredients

Services: Chemical trading; financing; logistics; sourcing

Assets: Offices in Bogota, Panama, Mexico and US

Trading sales: 86%

281

ANLOC PHAT

2024 SALES: \$17M

Ho Chi Minh City, Vietnam

www.anlocphat.com.vn

CEO: Harry Nguyen

Products: Synthetic rubber; natural rubber; plastics; chemicals

Services: Import; export

Assets: Offices and warehouses

Trading sales: 50%

282

CRISMACHEM

2024 SALES: \$16.9M (€16.3M)

Madrid, Spain

www.crismachem.com

CEO: Marcelo Montoro

Products: Specialty chemicals for construction; coatings, adhesives, sealants and elastomers (CASE); resins; cellulose ethers; additives; minerals; pigments; lightweight aggregates

Services: Storage; custom blending and re-packaging; sieving; formulation; drumming; training; project development; technical support

Assets: 2 warehouses; 1 lab

Trading sales: 10%

283

ELASTOQUIM

2024 SALES: \$16.9M (€16.3M)

Elche, Spain

www.elastoquim.com

CEO: Angel Duo

Products: PU systems; release agents; anti-foams; leveling and dispersing additives; TPU; TPE; organic peroxides; PU elastomers; color pastes; nylon tapes; films

Assets: Warehouses in Tarragona, Alicante and Porto

Trading sales: 40%

284

CHEMCEED

2024 SALES: \$15.1M

Chippewa Falls, Wisconsin, US

www.chemceed.com

President: Marimel Enderes

Products: Plasticizers; corrosion inhibitors; additives; solvents; fatty acids; alcohols; specialty chemicals; industrial chemicals; food additives

Services: Blending; packaging; labeling; storage; consignment; JIT delivery

Assets: 1 warehouse

Trading sales: 30%

285

MULTICHEM SPECIALITIES

2024 SALES: \$14.6M (RS1.25BN)

Mumbai, India

www.multichemindia.com

Managing Director and CEO: Manish Karnani

Products: Potassium monopersulfate – oxone; sodium percarbonate; epichlorohydrin; allyl chloride; Vazo-64G(AIBN); glycolic acid; trichloroisocyanuric acid; hexylene glycol; lithium carbonate; DL-tartaric acid; neo pentyl glycol; glutaraldehyde 50%; acetoni-trile; whey protein

286

LABORSPIRIT

2024 SALES: \$14.5M (€14M)

Loures, Portugal

www.laborspirit.com

CEO: Ana Paula Domingues

Products: Chemicals reagents; raw materials

Assets: Warehouse

Trading sales: 5%

287

CUSTOM CHEMICAL SERVICES

2024 SALES: \$13.4M

Hitchcock, Texas, US

www.cchemicals.com

President: Margaret Roff

Products: Alcohols; aromatics; glycols; surfactants; solvents; oil and gas and mining chemicals; inorganics

Services: Custom blending; packaging; neutralization; dilutions; transloading; toll blending; storage; lab services

Assets: Bulk storage tanks; bulk blending vessels; warehouses; rail; laboratory

288

BELCHEM SOLUTIONS

2024 SALES: \$13.3M

Brussels, Belgium

www.belchem.be

Director: Linda Pleisha

Products: Chemical raw materials for paints, coatings, adhesives, sealants, resins, printing inks, textiles, plastics, polymers

Services: Sourcing; sales and marketing; just-in-time delivery; storage; logistics

289

KLAUS F. MEYER

2024 SALES: \$12.2M (€11.8M)

Fussgoenheim, Germany

www.klausfmeier.de

Managing Directors: Martina Magnie, Frank Meyer

Products: Hydroxylamine sulfate; hydroxylamine hydrochloride; triflic acid; MEKO; nitromethane; isocyanuric acid; BHT; p-toluene-sulfonic acid; n-isopropylhydroxylamine; anthranilic acid; agrochemicals; pharmaceuticals; specialty chemicals; catalysts

Services: Door-to-door-service; refilling of triflic acid; handling of dangerous goods; stockholding; isotanks

290

DYNAMIX

2024 SALES: \$11.1M (C\$16M)

Markham, Ontario, Canada

www.dynamix-inc.com

Co-Presidents: Stewart Tymchuk, Charles Morris

Products: Electroplating chemicals; anodizing chemicals; PFA-free fume suppressants; water treatment chemicals; coating strippers; paint strippers; galvanizing chemicals; metal cleaners; antiquing solutions; zinc electroplating; electroless nickel; hard chrome electroplating; trivalent chrome electroplating

Services: Laboratory service; technical service; toll blending; warehousing; 3PL; analytical services; custom compounding

Assets: Warehouse; fully equipped lab; blending equipment; analytical instrumentation

291

CLASSIC DISTRIBUTING

2024 SALES: \$11M

Pacoima, California, US

www.classicdistrib.com

President: Larry Helscher

Products: Surfactants; esters; preservatives;



SPECIAL REPORT

TOP 100 CHEMICAL DISTRIBUTORS



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waxes; quats; conditioner bases; novel solutions
Services: Technical sales; customer service; product development
Assets: Warehouse; trucking; applications lab
Trading sales: 5%

292

SKYSTEP TRADING
2024 SALES: \$10.6M
Limassol, Cyprus

www.skystep.eu

Director: Oksana Spyrou

Products: Acrylates and methacrylates; monomers; glycols; alcohols; solvents; plasticizers; acetates; acids; aromatics

Services: Sales and marketing; financing; extensive technical and customer support; logistics and documentation; transportation and forwarding of dry and tank containers; bulk shipping; handling; storage and inventory management

Assets: 2 offices in Limassol

Trading sales: 100%

293

QUIMICA MER
2024 SALES: \$10.1M (€9.8M)
Casarrubios del Monte, Toledo, Spain

www.quimicamer.es

CEO: Javier Huerta Gonzalez

Products: Solvents and thinners; green solvents; paints and coatings raw materials; adhesives and sealants raw materials; aroma/perfumes and cosmetics raw materials; softeners and detergents raw materials; emulsions and copolymers; anti-freezing formulat-

ed products; epoxy resins; pharma, cosmetic and agro chemicals raw materials; organic and inorganic chemicals; aeronautic and automotive raw materials; water treatment chemicals; ink and printing chemicals; food chemicals

Services: Bulk storage; blending and formulations; packaging and bulk deliveries; logistics and outsourcing; lab analytical services to 3rd parties; e-invoicing

Assets: 1 warehouse (bulk and packed storage); blending facility; 2 bulk tank cars; 2 packed trucks

Trading sales: 2.4%

294

COREFLOW CHEMI
2024 SALES: \$8.1M
Vadodara, India

www.coreflowchemi.com

Director: Burhan Bazi

Products: Surfactants: SLES; AOS; CAPB; SLS; BKC; chloro-toluene; benzyl chloride; benzaldehyde; cinnamaldehyde

Services: Warehousing; repackaging; blending; transport; quality testing; market research

Assets: 3 warehouses; 2 offices; 4 trucks

295

AUDICHE TRADING
2024 SALES: \$8M
Alexandria, Egypt

www.audiche.com

Chairman: Alain Audiche

Products: Titanium dioxide; methyl ethyl ketoxime; zinc phosphates; polyvinyl alcohol; micaceous iron oxide; glass flakes; com-



pound ferro titanium; iron oxides; transparent red iron oxide; additives for concrete; calcium sulfo aluminate; Denka Sigma 2000; kaolin; bentone

Services: Agencies; trading

Assets: 1 office; 2 warehouses; 2 trucks

Trading sales: 75%

296

CHEMBROKER
2024 SALES: \$7M
Moscow, Russia

chembroker.ru

CEO: Artem Petukhov

Products: Food ingredients; pharma excipients; home and personal care ingredients; polymers and coatings raw materials

Services: Delivery; technical support; small packing

297

BIZINBIZ TECHNOLOGIES (ELCHEMY)
2024 SALES: \$5.8M

Mumbai, India

www.elchemy.com

Directors: Hardik Seth, Shobhit Jain

Products: UV filters; surfactants; moisturizers; thickeners; active ingredients; photoinitiators; CAPB; SLES 70%; AOS 40; nonyl phenol EO; white oil; fragrance chemicals

Services: Contract manufacturing; toll manufacturing; consolidation; live order visibility and transparency; market intelligence and in-





Shutterstock

sights; repackaging; warehousing; white labeling; sourcing consultants; quality inspection and assurance; end-to-end supply chain (ex-works to DDP); documentation; customized formulations.

Assets: 1 subsidiary in US; 2 warehouses in US (3PL) and 1 warehouse in India (3PL); 3 partner contract manufacturing sites in India

298

DAKRAM MATERIALS

2024 SALES: \$5.1M (£4.1M)

Biggleswade, Bedfordshire, UK

www.dakram.com

Managing Director: Kate Mingay

Products: Vitamins; trace elements; agricultural chemicals; animal health ingredients; animal feed; minerals; catalysts

Trading sales: 10%

299

JCRAMALHO & CO

2024 SALES: \$4.7M (€4.5M)

Alcanena, Portugal

www.jcramalho.com

General Manager: Fernando Ramalho

Products: Textile and tannery chemicals; pulp and paper chemicals; plastics and rubber additives; water treatment chemicals; automobile and metallurgy chemicals; detergent chemicals; agriculture and food ingredients; glass materials; stone extraction/transformation chemicals; paints and varnishes; oilfield chemicals; wine ingredients

Services: Storage of liquid and packed products; blending; tailor-made packaging; dissolution assets

Assets: Warehouse

300 VTAR

2024 SALES: \$4.5M

Vadodara, India

www.vtar.in

Directors: Vivek Singh, Tarang Patel

Products: Soaps, detergents and surfactants; fertilizers; feed and agrochemicals; food and beverage ingredients; cosmetics and personal care ingredients; home care chemicals; oil drilling chemicals; polymers; pharma APIs; basic industrial chemicals

Services: Contract manufacturing; sourcing; warehousing

Assets: UAE office; Sri Lanka office; bulk repacking facility; 2 warehouses

Trading sales: 65%

301 MRUCHEM

2024 SALES: \$3.6M

Vadodara, Gujarat, India

www.mrucchem.com

CEO: Mrugesh Parekh

Products: Surfactant and surfactant intermediates; cosmetic ingredients; aroma chemicals; home and personal care ingredients; paints and coatings; pharmaceutical APIs

Services: Contract/toll manufacturing;

chemical blending and repacking; customized packing and labeling services; quality assurance; consolidation; white labeling; end-to-end supply chain (ex works to DDP); REACH certification; ISO certification; D-U-N-S number registration

Assets: 2 offices; 3 warehouses; 2 contract manufacturing plants

Trading sales: 40%

302 GRUPO KETSIN

2024 SALES: \$3.6M

Alajuela, Costa Rica

www.grupoketsin.com

CEO: Cesar Marin

Products: Specialties; polymers; paints and coatings; detergents; agrochemicals; sanitizers; household chemicals; personal care ingredients; solvents; water treatment chemicals; solvents; food additives

Services: Logistics; warehousing; safety stock; packaging; transportation

Assets: 2 facilities (Costa Rica and Guatemala); warehouses all across Central America; own truck fleet

Trading sales: 5%

Note: Local currency sales converted to US dollars based on 31 December 2024 exchange rates

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Learn. Develop. Discover.

ICIS conferences and events bring together communities from across the value chain within the chemical and energy sectors.

17th ICIS Asian Base Oils and Lubricants Conference

Fairmont Hotel | Singapore

Conference: 19-20 June 2025 | Training: 17-18 June 2025

The 17th ICIS Asian Base Oils and Lubricants Conference is fast approaching, and with just a few weeks left to register, now is the perfect time to secure your place. Join industry leaders, experts, and key decision-makers in Singapore this June to gain valuable insights, explore new opportunities, and network with the best in the business. From the future of re-refined base oils to the latest in electric vehicle technology and the shifting dynamics of the Chinese market, this conference will provide you with the knowledge and connections to stay ahead in a rapidly evolving industry.

[As spaces are filling up, ensure you don't miss your chance to be part of this essential event](#)

14th ICIS World Oleochemicals Conference

The Westin Valencia, Spain

Conference: 1-2 October 2025 | Training: 30 September 2025

The 14th ICIS World Oleochemicals Conference is your opportunity to explore the key developments reshaping the industry. Key themes include navigating macroeconomic trends, sustainable feedstocks and innovation, staying competitive amid expanding petrochemical capacity, and adapting to evolving regulations like the European Union Deforestation Regulation (EUDR). Beyond the insights, this conference offers unparalleled networking opportunities with senior decision-makers and industry leaders, allowing you to forge valuable connections that can drive your business forward.

[Register your interest now to secure your place at this must-attend event](#)

Training Courses

Learn. Develop. Discover.

Aromatic Insights: From Petroleum to Products

Virtual: 10 July 2025

9am New York/2pm London/5pm Dubai

Navigating the world of aromatics can be complex – especially if you're new to the industry. Our upcoming half-day workshop is designed to break down the complexity of the aromatics sector and provide you with a clear, structured understanding of how aromatics fit into the wider refining and petrochemical landscape. Starting with building blocks and feedstocks, the workshop will guide you through the key factors influencing downstream market demand.

[Click **HERE** to find out more](#)

Petrochemicals: An In-Depth Introduction

Virtual: 15-17 July 2025

9am New York/2pm London/5pm Dubai

This course provides a well-rounded overview of both the commercial and technical aspects of the petrochemical industry. It's ideal for newcomers as well as experienced professionals seeking a deeper understanding of the sector and the key forces shaping it. By the end of the course, you'll be able to:

- Grasp the dynamics and core drivers of the petrochemical industry
- Understand the seven building blocks of petrochemicals
- Assess links to upstream and downstream markets, refining, oil and gas

[Click **HERE** to find out more](#)



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icis.com/conferences
and icis.com/training

Bruno Menini Sao Paulo

Polypropylene

Uses

Polypropylene (PP) is a thermoplastic polymer used in a wide range of consumer and industrial products, with major applications in packaging, fibers and automotive parts. Applications include packaging for consumer products, plastic parts for industries including the automotive sector, caps and closures, special devices like living hinges, and textiles. PP can also be used in more specialized industries, such as for medical applications like syringes, and IV bags.

Supply/demand

There are no new projects in the pipeline for the Latin American region.

Petroquímica Cuyo is the only producer in Argentina, after the purchase of its only competitor, Petroken.

Braskem is the only producer in Brazil after it has absorbed its competitors in the country.

Esenttia, in Colombia, was the last LatAm producer to invest in the region. Esenttia's expansion is ready but start-up remains unclear amid challenging market conditions. The debottlenecking project raised its nominal capacity by 70,000 tonnes/year.

Production has also been steady in Chile and Mexico in recent years.

The primary barrier to building new PP plants or expanding existing ones is the availability of propylene feedstock.

Latin America is not self-sufficient in PP production, which means the region will continue to import to meet demand.

Most of South America's PP imports originate in the Middle East, Asia, and the South American nations themselves. But in recent years, the region has seen a rise in imports from the US and China.

Although the US doesn't have as much PP available for export, it has been gaining ground mainly in the Colombian and Chilean markets.

China, meanwhile, continues to add new capacity and producers there are increasing exports to all of Latin America.

As for Mexico, most imports come from the US, with Asia coming in second.

In recent months, demand has been sluggish in Latin America, pressured by economic and political problems.

In Mexico, the automotive market, a major consumer of PP, has been suffering from the tariffs imposed by the US since April.

Overall supply remains sufficient to meet demand across LatAm countries.

Prices

PP prices in Latin America vary by country.

Since last year, Argentina has been cutting tariffs, and it is reopening the country to imports. Brazil continues to be the major exporter to Argentina.

The government has also facilitated payments to foreign countries, which has encouraged local converters to look for other supplier options.

On the other hand, Brazil has been doing exactly the opposite, increasing taxes to protect local industry from more competitive imports. In October 2024, the country raised PP import tariffs from 12.6% to 20%.

On the other side, prices in Chile, Peru, Colombia, and Mexico are quite competitive with those in Asia, the Middle East, and the US.

Technology

PP is made from the polymerization of propylene gas in the presence of a catalyst, usually Ziegler-Natta or metallocene. Polymerization conditions (temperature, pressure, and reactant concentrations) are determined by the polymer grade to be produced.

Current bulk technologies such as the Spheripol process developed in 1982 by Himont, replaced the solvent in an older pro-

Latin America PP capacity '000 tonnes/year

Company	Location	Capacity
Braskem	Triunfo, Brazil	740
Indelpro	Altamira, Mexico	710
Esenttia	Cartagena, Colombia	570
Braskem	Maua, Brazil	450
Braskem	Paulinia, Brazil	350
Braskem	Duque De Caxias, Brazil	310
Petrocuyo	Ensenada, Argentina	210
Petrocuyo	Lujan De Cuyo, Argentina	132
Petroquim	Talcahuano, Chile	120



A full list of plants and projects capacities, forecasts, production volumes and operating rates are available on the **ICIS Supply and Demand database**

cess with liquid propylene. Borealis' Borstar bimodal polyethylene (PE) process developed in the mid-1990s has also been adapted for PP.

Outlook

According to Thais Matsuda, ICIS Chemical Markets Analyst, LatAm, global PP supply is expected to remain abundant due to capacity additions in China in 2025, keeping downward pressure on local prices. Latin American markets, particularly Brazil, Colombia, Chile, and Peru, are seeing increased imports from Asia, as a result of plentiful of global supply and competitive prices from this origin. ICIS Supply and Demand data indicate increases of 42%, 65%, 5%, and 22% in imports for the four countries, respectively, between 2024 and 2025. Mexico, on the other hand, remains reliant on the U.S. supply.

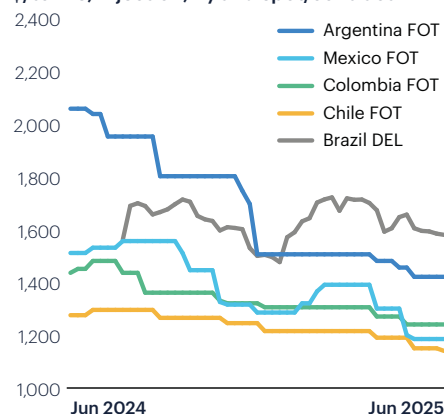
Regional PP demand is forecast to grow by 1.0% and 2.5% in 2025 and 2026, respectively, constrained by high inflation and interest rates, and political uncertainties. The scenario is not expected to change dramatically in 2026. Competition is expected to remain strong throughout this year and next year. Domestic producers, especially the naphtha-based ones, will continue making efforts to better balance their local market share and margins. ■



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Latin America PP

\$/tonne, injection, hybrid spot/contract



Miguel Rodriguez Fernandez London

PX and OX

Uses

Paraxylene (PX) is the largest commercial isomer of xylene. PX is predominantly used as a feedstock to produce purified terephthalic acid (PTA), which goes into polyethylene terephthalate (PET). Other PX derivatives include dimethyl terephthalate (DMT), solvents and herbicides. Orthoxylene (OX) is the second largest commercial isomer of xylene. OX is used almost entirely in the manufacturing of phthalic anhydride (PA), which is converted to plasticizers, alkyd and polyester resins.

Supply/demand

The European PX market was long for most of the first half of the year, although there were signs of rebalancing in May, driven by lower operating rates in Asia and stronger demand from Sasa's new PTA plant in Turkey. Demand for PX in Europe has been subdued in H1 from both chemical buyers and gasoline blenders. Competitive imports of downstream PTA and PET from Asia, coupled with a strong Euro, low freight rates and an uncertain macroeconomic outlook weighed down on domestic appetite for PX.

Although PX demand historically gathered pace in April and May, coinciding with the start of the strong summer bottling period, the seasonal effect has yet to be seen in 2025.

With domestic demand in the doldrums, European exports of PX to the US rose by 86% year-on-year in Q1, in the run-up to US President Donald Trump's announcement of new tariffs on imports into the US. The European OX market has remained stable versus 2024.

Demand is widely seen as unchanged at low levels, mainly due to the lack of appetite from the key downstream construction industry.

OX availability is not long but remains sufficient to meet orders in the current context. Supply from Asia has been more limited due to new downstream capacities in the region and lower operating rates in Q2. Contractual deliveries are enough to meet European buyers' requirements and spot activity has been nearly non-existent in the five months to May.

Prices

European PX contract prices were up in January and February before declining in March. Discussions for April are taking much longer than expected and an agreement remained elusive by the end of May.

A sharp decline in PX prices in the influential Asian PX market is the main obstacle hampering April contract talks.

OX contract prices also increased in January and February, rolling over in March and falling in April and May, mainly tracking cost movements in the upstream crude oil market.

Feedstock costs were highly volatile in the first half of 2025 due to the uncertain macroeconomic scenario triggered by US President Donald Trump's tariff policies and OPEC+ high crude oil production. Both PX and OX contract prices in Europe in H1 remained substantially below the levels seen in the same period in 2024.

Technology

Conventional PX production is based on the isomerisation of mixed xylenes (MX) from refinery reformat streams or from pyrolysis gasoline (pygas). High-purity PX can be obtained using crystallisation or selective adsorptive separation. OX is produced by high-severity catalytic reforming of naphtha, which produces a C8 stream containing MX and ethylbenzene (EB). OX is usually separated from primary product PX using distillation of the MX stream.

Outlook

PX demand is expected to remain stable at sluggish levels in the second half of the year. Hope lies in the European Commission's PET ADD investigation into Vietnamese imports and higher shipping freights, which may mean more demand for domestic PET and therefore for PTA and PX.

Europe PX and OX capacity '000 tonnes/year

Company	Location	Capacity
ExxonMobil*	Botlek, Netherlands	720
INEOS*	Geel, Belgium	610
Orlen*	Plock, Poland	400
Petkim Petrokimya*	Aliaga, Turkey	136
Exxonmobil**	Botlek, Netherlands	135
TotalEnergies*	Gonfreville, France	110
TotalEnergies**	Gonfreville, France	110
Moeve*	Algeciras, Spain	80
Pck Raff. Schwedt*	Schwedt, Germany	65
MOL**	Szazhalombatta, Hungary	45
Pck Raff. Schwedt*	Schwedt, Germany	40
Petkim Petrokimya	Aliaga, Turkey	40
Slovnaft	Bratislava, Slovak Republic	10

*Paraxylene, **Orthoxylene



A full list of plants and projects capacities, forecasts, production volumes and operating rates are available on the **ICIS Supply and Demand database**

The tariffs announced by Trump on imports from the EU may pose a major challenge for the European PX industry as the US has consistently been the main destination of PX exports from the European Union. Trade restrictions are likely to encourage EU PX producers to find alternative markets in Mexico and other Latin American countries. OX demand is also likely to be stable versus 2024 in the remainder of the year. Most players rule out any significant uptick in demand from the construction sector during the second half of 2025.

Supply for both products is due to be sufficient to meet downstream orders, although lower run rates in Asia are expected to balance the global market. Uncertainties surrounding tariffs and the macroeconomic outlook of Europe are also a factor expected to weigh on the industry's mood towards the end of the year. ■



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Europe OX, PX





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