



**Builders Merchants
Market
Research & Analysis
*UK 2011***

REPORT SAMPLE

**Builders Merchants Market Size & Industry Review 2005-2011; SWOT & PEST
Analysis, Product Mix & Key Trends 2005-2015; Merchants Profiles & Key
Financials; Market Forecasts to 2015**

2nd Edition

November 2011

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1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this Research & Analysis Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, SWOT, key trends and influences and future prospects for the market. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product Mix – Current & Future**

This report identifies the key product sectors in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Industry Structure Analysis**

The report identifies the key characteristics of the structure of the industry, analysed by turnover bands, credit rating, performance over the last 12 months, age of companies, employee bands and geographical share by UK region. This analysis enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. Based on quantitative, statistically valid research, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page company profile including contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current and historical financial health of a competitor or potential client.

- **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK BUILDERS MERCHANTS MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Builders Merchants Market is defined as consisting of a wide range of materials and products sold through builders merchants for use in domestic and non-domestic new build & RMI (repair, maintenance & improvement) construction and building markets. Specifically, this report reviews the UK builders merchants market sales between 2005 and 2011 with forecasts to 2015 for each of the main sectors below:-

- **Building Products & Materials** – Bricks, blocks, civils, drainage, prefabricated concrete products, lintels, foundations, membranes, aggregates, concrete, sand, cement, plaster, roofing etc
- **Plumbing, Heating, Ventilation** – Rainwater goods, pipes & fittings, rainwater harvesting, boilers, direct heater, ventilation, underfloor heating, water heaters, radiators, controls, air-conditioning, sensors etc.
- **Ceilings, Partitions & Insulation** – Drylining / plasterboard, suspended ceilings, partitioning systems, compounds, coving, profiles, trims, fittings, insulation (slabs, boards, fire protection, glass reinforced gypsum board, rolls, sheets, insulated panels, SIPs etc)
- **Fixings, Fasteners & Ironmongery** – Screws, nails, bolts, pins, collars, rivets, architectural ironmongery, door & window fittings, wire reinforcement, wall ties etc
- **Décor, Paints, Tiles & Floorcoverings** – Paints, varnishes, woodcare, wallcoverings, adhesives, caulk, grout, filler etc, floorcoverings (tile, laminate, engineered wood, cork etc), masking paper, paint tape etc)
- **Kitchens & Bathroom Products** – Baths, Sanitaryware, showers, shower controls, shower enclosures, shower trays, kitchen furniture, worktops, sinks, brassware (taps, bath fillers, filter taps, mixers etc).
- **Lighting & Electrical Accessories** – Wiring accessories (switches, sockets, dimmers, controls, sensors etc), cables & wires, busbars, luminaires, lamps, accessories etc)
- **Paving & Hard Landscaping** – Paving, flags, edging, coping, stone, walling, decking, fencing, arbours, posts, trellis etc, bark, mulch, chippings, compost, soil, garden buildings, garden rooms, sheds etc.
- **Timber, Doors and Windows** – Carcassing, sawn joinery, sheet materials, trusses, flooring, PSE (plained square edge), softwood mouldings, doors, windows (timber, aluminium & PVC-U etc)
- **Hand Tools, Power Tools, Tool Hire** – Manual / hand tools, portable power tools, tool hire, consumables, accessories etc.

All prices in this report are measured at merchants selling prices excluding any value added or other taxes and delivery charges. Wherever possible, the market definition excludes sales through plumbers' merchants, roofing, timber and other merchants who do not provide as wide a range of products as indicated above. The methodology for this report is based on the last 4 years of financial data from the industry, coupled with a wide range of secondary sources from websites, Companies House, HM Government, trade journals, credit reference agencies, industry commentators and our own experience of researching this market for more than a decade.

Following an [REDACTED] in 2010, indications are that 2011 has [REDACTED] commercial new build and RMI (repair, maintenance and improvement) activity which has [REDACTED] in current price terms at around 2.4%. Prospects for 2012 are for [REDACTED] 2013-2015 forecast to [REDACTED] Q3 2012, with sales [REDACTED]

The largest sector of the market is accounted for [REDACTED] billion by year end December 2011.

Plumbing, heating and ventilation products also represent a significant proportion of [REDACTED] market in 2011.

Sales of kitchens and bathrooms through builders merchants represent a key and [REDACTED] include ceilings / partitions / drylining; fixings and fasteners, electrical & lighting products; hard landscaping products and tools & tool hire.

A degree of polarisation is evident in the builders merchants market at present, with 30% of companies in the last year having experienced a decline in turnover, with a further 16% seeing sales contract to some extent. With 53% of merchants experiencing growth and 46% seeing contracting sales, the uncertainty in the market clearly remains and the industry continues to be described as 'fragile' by a large number of companies. Nevertheless, this represents a more positive finding than our last report which found that 75% of merchants had experienced either static or a contraction in sales in the preceding 12 months to August 2010.28% of [REDACTED]

profitability.

2.2 BUILDERS MERCHANTS MARKET SIZE & TRENDS 2005-2015

2.2.1 Builders Merchants Market Size 2005-2015 – Current Prices

The UK Builders Merchants market encompasses a wide range of products and is estimated to be worth [REDACTED] 2011 as illustrated in the following chart:-

Figure 1: Builders Merchants Market – UK 2005 - 2015 By Value £m

Chart Redacted for Sample

Source: MTW Research / Trade Estimates

The UK builders merchants market is currently valued [REDACTED]

[REDACTED]

estimated at around 6%.

Whilst consumer [REDACTED]

[REDACTED]

[REDACTED] in new build activity over the last 3-4 years.

Toward the end of [REDACTED]

[REDACTED]

foundation materials due to the lack of new build projects being started.

[REDACTED] may have been [REDACTED] supported to some extent by rising disposable income levels as Bank of England interest rates were cut and mortgage [REDACTED] homeowners.

[REDACTED] This resulted in rising volume demand for [REDACTED] of the economy, most notably the commodity retail sector.

In [REDACTED], the [REDACTED] increasing pressure.

As such, our estimates for the builders merchants market to year end December 2011 are [REDACTED] billion.

This [REDACTED] with sales in H2 less buoyant.

Principally, the market has experienced four [REDACTED] half of the year.

Sources indicate that the merchenting market [REDACTED] RMI volume estimated to have [REDACTED]

[REDACTED]
[REDACTED] a 7% decline in 2009,
reflecting a rapid [REDACTED] or [REDACTED]
[REDACTED] sector.

There are a significant number of [REDACTED]
[REDACTED]
[REDACTED] Europe wide [REDACTED]

However, as the UK continues a [REDACTED]
[REDACTED]
[REDACTED] y. As such, our forecasts for the
merchants market are for a return to [REDACTED]
[REDACTED]
[REDACTED] to peak levels last
experienced in [REDACTED]

2.2.2 Builders Merchants Market Size 2005-2015 – Constant Prices

The following chart illustrates the performance of the market value with consumer price index inflation stripped out since 2005, with forecasts to 2015:-

Figure 2: Builders Merchants Market – UK 2005 - 2015 Constant Prices £M

Chart Redacted for Sample

Source: MTW Research / Trade Estimates

As illustrated, based on constant 2005 prices, the Builders Merchants market has endured a [REDACTED]
[REDACTED]
[REDACTED] UK economy.

The key characteristics of the builders merchants market

[REDACTED]

[REDACTED] 'heavyside' building materials.

A key tactic

[REDACTED]

[REDACTED] strategy continued throughout 2010 and was adopted by an increasing number of merchants, underpinning the industry in terms of profitability to some extent.

Sources indicate that merchants

[REDACTED]

[REDACTED], changing product portfolios etc.

Prior to

[REDACTED]

[REDACTED] confidence in terms of capital investment, with merchants preferring instead to [REDACTED] liquid assets.

Customer characteristics are

[REDACTED]

[REDACTED] shift in customer base in the last 3 years underlines the need for builders merchants and their suppliers to be [REDACTED]

Another

[REDACTED]

[REDACTED] and suppliers and is likely to become an increasingly popular tactic in the near to medium term amongst multiple branch merchants.

During [REDACTED] is often a key stimulant for larger refurbishment projects.

To year end 2011, forecasts are for a [REDACTED] is increasingly representing a key threat to the overall builders merchants market.

The increase in business [REDACTED] levels of efficiency is sustained against a backdrop of [REDACTED] in demand overall.

Expectations are for [REDACTED] returns to the market.

As previously discussed, one of the key driving influences of market demand for builders merchants is the level of new [REDACTED] sectors. The following chart illustrates the value of 'real term' output by the UK new build and RMI markets since 2005 and forecasts to 2015 at constant 2005 prices:-

Figure 3: UK Construction Market by Value (Total New Build & RMI) 2005-2015

Chart Redacted for Sample

Source: MTW Research / ONS

The UK construction market is forecast to be worth just under £ [REDACTED] for building contractors, builders merchants and their suppliers.

As illustrated above, RMI and new build output [REDACTED] and derived from Q2 and Q3 2010 – rising by 17%, with both Q1 and Q4 2010 recording [REDACTED]

Activity in the first quarter of 2011 [REDACTED] with the construction market overall losing around £750 million worth of output by the end of 2011.

Prospects for 2012 are [REDACTED] PFI [REDACTED] Government to Public Private Partnerships (PPPs) in the longer term.

The following chart illustrates how the UK construction market is divided between private new build, public new build, private RMI and public RMI in 2011:-

Figure 18: Construction Market - Share by Private & Public New Build & Refurbishment in 2011

Chart Redacted for Sample

Source: MTW Research / ONS

As the above chart illustrates, the largest sector of the UK construction market [REDACTED] 28% of the market.

[REDACTED] 16% share of the market overall.

Forecasts are for [REDACTED] in the public new build sector than from RMI applications.

Overall, construction output is forecast to [REDACTED] 2011 market size.

2.2.3 Future Prospects

Given the [REDACTED] in volume terms, with some [REDACTED] development.

Our forecasts are for the market to [REDACTED] year, though this is based on the realisation of a number of positive macro-economic factors, including:-

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

Given the realisation of the above issues in 2012, the sector is forecast to [REDACTED] across the industry.

In line with [REDACTED]

The growing ability for merchants to add value to their product portfolio should underpin the market in the near-medium term, with customers seeking key benefits such as:-

[REDACTED]

These and other issues should offer improved opportunities for merchants and their associated suppliers to add value to their core product offering and offset the impact of competing channels to some extent in the medium to longer term.

2.3 KEY MARKET TRENDS IN THE BUILDERS MERCHANTS MARKET

2.3.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK Builders Merchants market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Key opportunities and threats evident in the market at present include:-

Figure 10: Key Opportunitites & Threats in the Builders Merchants Market 2011-2015

OPPORTUNITIES	THREATS
[Redacted Content]	[Redacted Content]

Source: MTW Research Strategic Review 2011

3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2011, 2005 & 2015

The share accounted for by each of the key product sectors within the UK builders merchants market in 2011 is illustrated in the following chart:-

Figure 18: Share by Product in Builders Merchants Market 2011

Chart Redacted for Sample

Source: MTW Research / Trade Sources

As the above chart illustrates, the UK builders merchants market comprises of a wide range of product sectors with a variety of uses. The largest sector of the market is accounted for by [REDACTED]

[REDACTED] value in 2011, reflecting a value of almost £2.45 billion at merchants selling prices.

Despite a [REDACTED], [REDACTED], is estimated to represent around 13% of the market in 2011.

Whilst primarily [REDACTED], [REDACTED] 12% of the total UK builders merchants market in 2011.

Sales of kitchens [REDACTED] tactics in order to exploit this opportunity.

The share [REDACTED] in lightside [REDACTED] under 10%.

In line with the trend toward builders merchants' [REDACTED]

£880 million to UK builders merchants at present and are set to continue to grow as market conditions improve.

In order to illustrate historical trends, the following chart illustrates the share by key product sector in 2005:-

Figure 19: Share by Product in Builders Merchants Market 2005

Chart Redacted for Sample

Source: MTW Research / Trade Sources

As the chart illustrates, there has [redacted] of the overall market.

As illustrated, the [redacted]

In line [redacted]

[redacted]

[redacted]

[redacted]



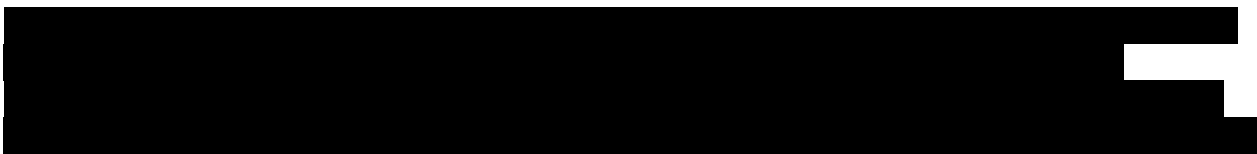
The following chart illustrates the forecast share for each key product sector within the builders merchants market in 2015:-

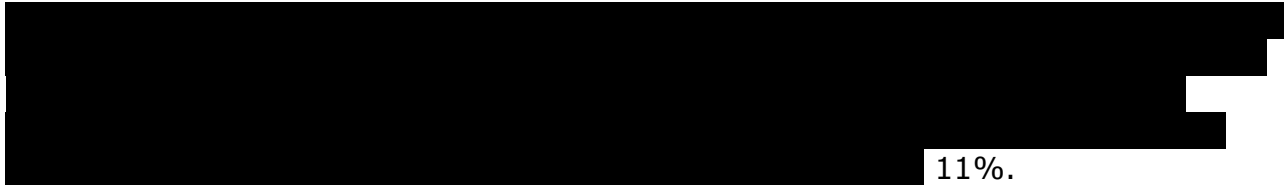
Figure 20: Forecast Share by Product in Builders Merchants Market 2015

Chart Redacted for Sample

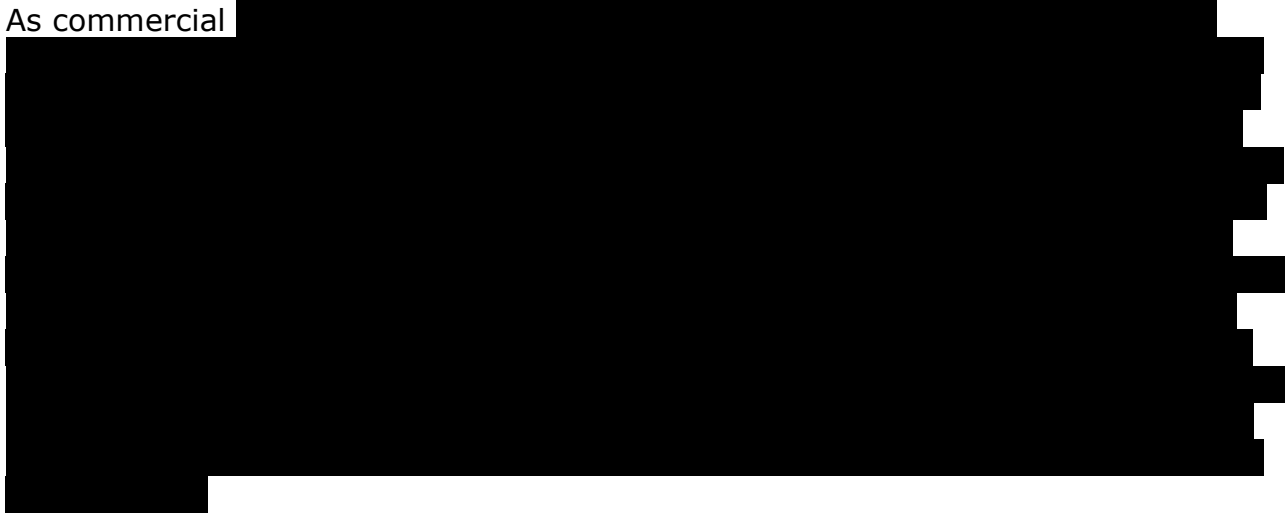
Source: MTW Research / Trade Sources

Indications are that

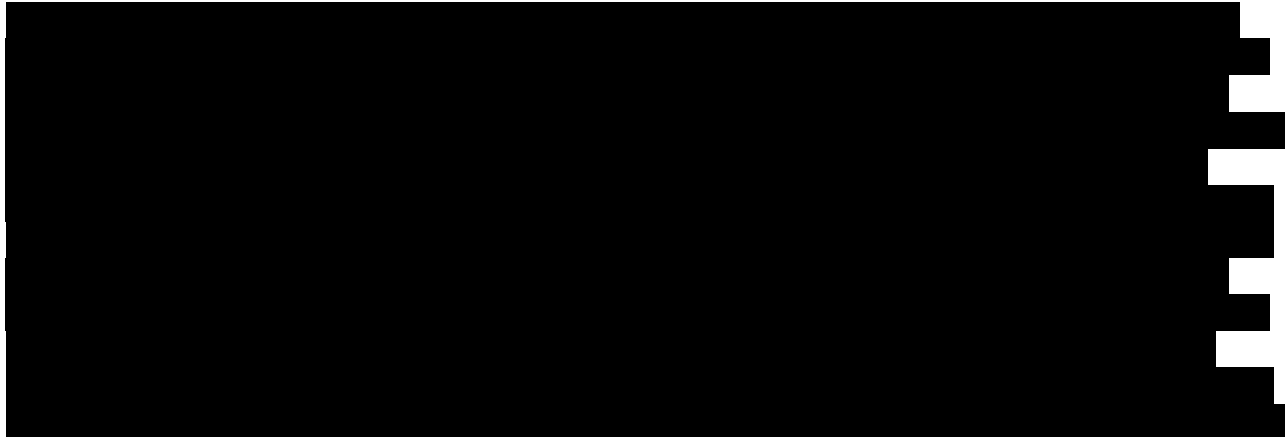




As commercial



In line with the decline in larger scale new build and RMI activity, the timber, doors and windows market is indicated to have lost some share of the merchants market in



forecasts are for sales to rise from £1.23 billion in 2011 to £1.5 billion by 2015.

3.2 Bricks, Blocks & Building Materials Market 2005-2015

The following chart illustrates the performance of the bricks, blocks and building materials market through the builders merchants channel by value since 2005 and forecasts to 2015:-

Figure 21: Building Materials Sales Via Builders Merchants by Value 2005-2015 £M

Chart Redacted for Sample

Source: MTW Research / Trade Estimates

The building materials sector comprises of a particularly wide range of products used in a wide range of applications across both the new build and RMI domestic and non-

domestic construction markets. The definition for this market includes the following key product sectors:-

- Bricks
- Blocks
- Civil Building Products (e.g ducting, drainage, kerbs, SUDs, municipal castings etc.)
- Drainage
- Prefabricated Concrete Products
- Lintels
- Foundations / Membranes
- Aggregates
- Sand
- Cement
- Concrete / Ready Mixed Concrete
- Plaster
- Roofing Products (excluding beams / joists – see timber products)

Sales of the above building materials through builders merchants are currently valued at around [REDACTED]

2.8%.

The more profitable [REDACTED]

Whilst the building materials [REDACTED]

[REDACTED] leisure markets, many of which have reduced overall new build and RMI activity in recent years.

The civil [REDACTED] worse for these products if it were not for this policy.

During [REDACTED] civil building materials and associated products is clear.

Within the aggregates / sand / cement / plaster sector, [REDACTED] proposition in terms of profitability.

[REDACTED]

The precast concrete product sector and lightweight blocks [REDACTED] H2 2012 onwards [REDACTED] 2013.

Within the drainage sector, there are

[REDACTED]

likely to continue in the medium to longer term.

The total UK brick market is currently estimated to be worth

[REDACTED]

strongly in 2012 onwards.

In addition to growth in

[REDACTED]

[REDACTED]

[REDACTED] in 2010 and has since experienced gradual growth due to rising demand for premium products. This trend is likely to continue in the near term, with more tangible growth likely from Q2 2012 onwards as housebuilding and RMI markets exhibit higher levels of activity.

4. BUILDERS MERCHANTS PROFILES

The following section identifies some of the key UK builders merchants and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

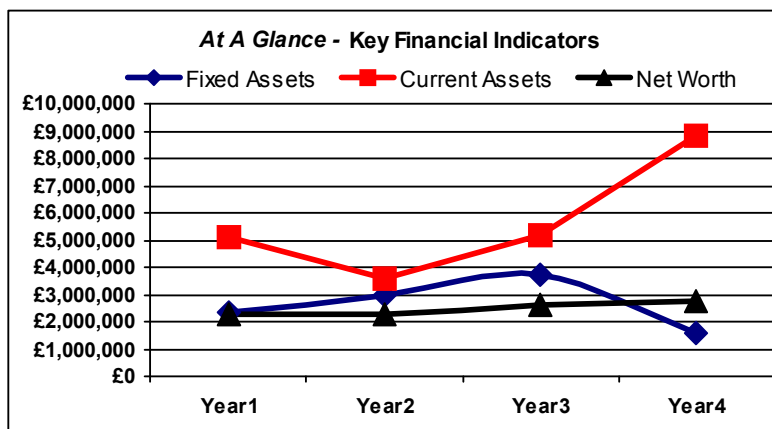
4.1 Builders Merchants Profiles & KPIs

Ltd - Company Overview & 'At A Glance'

Tyne And Wear
NE34
Tel:

Ltd is a private limited with share capital company, incorporated on 26 November 1985. The company's main activities are recorded by Companies House as "A group engaged in builders merchants."

In 2011, the company has an estimated 110-120 employees. To year end December 2010, A. Ltd is estimated to have achieved a turnover of around £22 million. Pre-tax profit for the same period is estimated at around £0.2 million. The following table briefly provides a top line overview on Ltd:-



Brief Description of Activities	A group engaged in builders merchants.
Parent Company	Ltd
Ultimate Holding Company	Ltd
Estimated Number of Employees	110-120
Senior Decision Maker / Director	Anne

The following table illustrates the company's key performance indicators for the last 4 years:-

Ltd - 4 Year KPIs to Year End 31/12/2010

Key Indicator £	Year End 31/12/2007 (Year1)	Year End 31/12/2008 (Year2)	Year End 31/12/2009 (Year3)	Year End 31/12/2010 (Year4)
Fixed Assets	£2,349,331	£2,997,354	£3,713,849	£1,592,380
Current Assets	£5,094,788	£3,572,476	£5,143,773	£8,800,279
Current Liabilities	£4,725,461	£4,002,383	£5,888,475	£7,250,657
Long Term Liabilities	£474,367	£269,225	£221,446	£251,178
Net Worth	£2,244,291	£2,298,222	£2,611,327	£2,780,320
Working Capital	£369,327	£-429,907	£-744,702	£1,549,622
Profit per Employee	£2,744	£969	£1,923	£1,399
Sales per Employee	-	£164,434	£174,753	£193,287

5. Builders Merchants Industry Trends 2005-2015

5.1 Builders Merchants Merchants Market – Industry Structure

The following section reviews the UK builders merchants market in 2011 in terms of industry structure based on industry financial sales data and provides key performance indicators for the UK builders merchants market.

5.2.1 Market Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 149: Market Share by Builders Merchants Sales Growth / Decline 2010-2011

Chart Redacted for Sample

Source: MTW Research / Company Accounts

Indications are

[Redacted]

[Redacted]

[Redacted]

[Redacted] 12 months to August 2010. According to industry sales, [Redacted] % of builders merchants have experienced rapid growth in turnover in the last 12 months to November 2011, defined as growth in excess of 10%. In addition, a further [Redacted] % of companies have reported growth of between 1-10% over the same period suggesting [Redacted] of overall sales.

However, [Redacted]

in the last 12 months, with a further 16%

Clearly the

scenario for UK builders merchants.

5.2.2 Industry Share by Credit Rating in 2011

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for by builders merchants merchants in terms of credit rating in August 2011November 2011:-

Figure 150: Market Share by Credit Rating in the Kitchen Builders MerchantsRetail Industry 2011

Chart Redacted for Sample

Source: MTW Research / Company Accounts

Credit ratings are a crucial indicator of the financial health of a company and when combined, as in the above chart, provide a graphic illustration of the current financial health of the overall market at present.

As of September November 2011, % of builders merchants are regarded as having either a 'good' or 'excellent' credit rating, representing a

profitability.

However,

late 2011.

as opposed to just 11% in 2010. Clearly the last 12-18 months of more buoyant trading has stabilised the industry considerably with the industry overall now generally regarded as being in relatively good health.

Whilst the levels of attrition feared in 2009 and 2010 did not come wholly to fruition, there were a large number of business failures in the kitchen retail sector, with lack of liquidity, low profitability and lack of available business finance accounting for a number of closures. In 2011, this has resulted in an industry which may be described as more 'focused' in terms of marketing approach and more streamlined in terms of efficiencies – though many independent merchants operate very efficiently regardless. As such, the number of companies considered at risk in September 2011 has fallen to just 3%, reflecting a considerably more healthy industry than was the case just 12 months ago.

5.2.3 Industry Mix by Age of Companies in 2011

The following chart illustrates the share by age of companies within the UK retail merchants market as at August 2011/November 2011:-

5.3 Key Market Trends in the Builders Merchants Industry 2005-2015

The following section reviews some of the key trends in terms of financial performance of the UK builders merchants market since 2005, and forecasts to 2015.

5.3.1 Kitchen Builders Merchants Market Profitability 2005-2015

The following table illustrates the performance of the builders merchants market in terms of profitability between 2005 and 2011 and provides forecasts to 2015:-

Figure 155: Builders Merchants Market Profitability 2005 – 2015 £M

Chart Redacted for Sample

Source: MTW Research / Trade Estimates

Profitability levels in the builders merchants market peaked in [REDACTED]
[REDACTED]

[REDACTED]

which are likely to impact on the sector in the short term. Following growth of around 2.57% in [REDACTED]
[REDACTED]

[REDACTED] current 2011 level. profitability levels have continued to rise in 2011 with real term growth in profit forecast for 2012, growing thereafter.

Following a return to real term growth in 2012, our forecasts are for margins to continue to rise, albeit modestly, on an annual basis reaching some £110 million by year end December 2015.

5.3.2 Builders Merchants Industry Assets 2005-2015

The following table illustrates the builders merchants market in terms of current and fixed assets between 2005 and 2011 and forecasts to 2015:-

5.4 Builders Merchants Merchants Ranking & Turnover Estimates

5.4.1 Builders Merchants Merchants Listing

The following identifies key market players active at present:-

Figure 163: Builders Merchants Merchants Company Listing

A. Thompson & Sons Ltd	Franklin (Sussex) Ltd	Murdock Builders Merchants Ltd
A.E.Spink Ltd	G. Webb Aggregates Limited	Newry Building Supplies Ltd
A.K. Timms & Sons Ltd	G.H. Supplies (London) Ltd	Nicholls & Clarke Ltd
A.W. Champion Timber Ltd	George Bence & Sons Ltd	Nu-Line Builders Merchants Ltd
A.W.Lumb & Co.Ltd	George Lines (Holdings) Ltd	One Stop Building Materials Direct Ltd
Acrelane Builders Merchants Ltd	George Tufts And Son Ltd	Orpington Timber & Building Supplies
Adrian White Building Supplies Ltd.	Go Interiors Limited	Oswald Record Plant Sales Ltd
Ainscough Building Supplies Ltd	Grafton Merchating Gb Limited	Offord Builders Merchants Ltd
Allendale Building Supplies Ltd	Grant & Stone Ltd	Owen Tatton Ltd
Allmat (East Surrey) Limited	Grant Haze Ltd	P & R Building Supplies Ltd
Alsford Timber Ltd	H. Butterfield Ltd	P. Mcdermott And Sons (Omagh) Ltd
Ashmead Building Supplies Ltd	H.A.C. Catherwood Ltd	P.A. Seccombe & Son, Ltd
B. Mcnamee & Co. Ltd	H.E.Olby & Co.Ltd	Parker Building Supplies Ltd
Beatsons Building Supplies Ltd	Hackney Building Supplies Ltd	Parr Rochdale Ltd
Beesley & Fildes Ltd	Haldane Fisher Ltd	PGR Timber Ltd
Blanchford & Co.Ltd	Heating Plumbing Supplies Ltd	Phoenix Merchants Ltd
Bolt Building Supplies Ltd	Henlow Building Supplies Ltd	Plastic Building Supplies Ltd
Boys & Boden, Limited	Henry Alty Ltd	Plastic Pipe Supplies Ltd
Bradfords Building Supplies Ltd	Hevey Building Supplies Ltd	Putney Builders Merchants Ltd
Brick Centre Limited	Howarth Timber & Building Supplies	R & J (Builders Hardware) Ltd
Brick Store Ltd	Hughes Forrest Ltd	R. & J. Ince Ltd
Browning Jones & Morris Ltd	Huthwaite Roofing Supplies Ltd	R.F. Amies (Kidderminster) Ltd
Browns Builders Merchants Ltd	Huws Gray Ltd	Ranton Building Supplies Ltd
BSS Group Ltd	Irwin & White Construction Co. Ltd	Rawle Gammon & Baker Holdings Ltd
Builders Supplies (West Coast) Ltd	J & P Building Systems Ltd	Ray Grahams Ltd
Builders Supply Co (Kendal) Ltd	J. Medler Ltd	Richard Williams (Deganwy) Ltd
Builders Supply Company Ltd	J.K.M. Industrial Supply Merchants Ltd	Ridgeon Group Ltd
Builders' Supply Stores (Coventry) Ltd	J.T.Dove,Ltd	Robert Dickie And Sons, Ltd
Bussens & Parkin Ltd	Jackson Building Centres Limited	Robert Price (Builders Merchants) Ltd
Busy Bee Builders Merchants Ltd	James Burrell Limited	Ron Sammons Ltd
C & S Builders Merchants (Stmfrd Hill)	James Wilby (Builders Merchants) Ltd	Saint-Gobain Building Distribution Ltd
C & W Berry Ltd	Jewson Ltd	Salisbury & Wood Ltd
C.Brewer & Sons Ltd	John A. Stephens Ltd	Samuel Kirk (Builders Merchants) Ltd
Caerfagu Products Ltd	John George & Sons Ltd	Sehmi Builders Merchants Ltd
Canvey Supply Company Ltd	John Nicholls (Holdings) Ltd	Shropshire Building Supplies Ltd
Cartmore Building Supply Company	John W Grant & Son Ltd	Smith & Frater Ltd.
Cawarden Brick & Tile Co. Ltd	Jones & Shuffs (Heavyside) Ltd	Spring Lane Builders Merchants Ltd
Chandlers Building Supplies Holdings	Joseph Parr Group Ltd	Stanley John Ltd
Chas Lowe And Sons (Builders Merchants)	Keith Builders Merchants Ltd	Sydenhams Ltd
Churchley Bros.Ltd	Kellaway Building Supplies Ltd	T. Crossling & Co. Ltd
Civil Solutions Ltd	Kent Blaxill & Co.Ltd	Taggart & Company Ltd
Collier & Catchpole Ltd	Kent Building Plastics (UK) Ltd.	Tamar Trading Co.Ltd
Construction Supplies (Hardware) Ltd	Kings Langley Building Supplies Ltd	Tipadel Ltd
Cooper Callas Ltd	Kington Building Supplies Ltd	Tiptree Building Supplies Ltd
County Building Supplies Ltd	Lawsons (Whetstone) Ltd	Totem Timber Ltd
Crompton Building Supplies Ltd	LBS Builders Merchants Ltd	Towy Works Ltd
Crossling Ltd	Lee Brothers Bilston Ltd	Travis Perkins Plc
Darlaston Builders Merchants Ltd	M. & J. Mahoney And Sons Ltd	Tudors Building Supplies (Hereford)
David Cover And Son Ltd	M. K. M. Building Supplies Ltd	W.& H.S.Emery Company Ltd
Dry Lining Supplies Ltd	M.Laurier & Sons Ltd	W.J.Odds Ltd
Dutton And Peters Ltd	M.Markovitz Ltd	W.T. Burden Ltd
E H Smith (Builders Merchants) Ltd	M.P. Moran & Sons Ltd	Wacher & Company,Ltd
Elliott Brothers (Builders Merchants)	Macinnes Brothers Ltd	Walkers The Builders Merchant Ltd
English Brothers Ltd	Manjits Ltd	Walter Tipper,Ltd
Ernest Bentley & Sons Ltd	Manningham Concrete Ltd	William Way (Godstone) Ltd
Fairalls (Builders Merchants) Ltd	Marshmoor Bricks Ltd	Wollens Ltd
Findlay, Glover And Macaulay Limited	Meakin Building Supplies Ltd	Wolseley Ltd
	Merritt & Fryers Ltd	Woods Building Supplies Ltd

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

5.4.2 Builders Merchants Merchants Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 164: Builders Merchants Merchants Ranked By Turnover 2010



5.4.3 Builders Merchants Retailer Turnover Estimates 2010

The following table illustrates the estimated turnover for each company for 2010:-

figure 165: Builders Merchants Retailer Sales Estimates 2010

