



**Kitchen & Bathroom
Distributors Market
Research & Analysis
UK 2010**

REPORT SAMPLE

**Kitchen & Bathroom Distributors Market Size & Trends 2004-2010; SWOT & PEST
Analysis, Product Mix 2004-2014; K&B Distributors' Customer Mix 2004-2014;
Distributor Profiles & Key Financials; Market Forecasts to 2014**

June 2010

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In order to enable benchmarking, competitor analysis and facilitate further market research, MTW have provided estimates for turnover, profit before tax and number of employees for small, medium sized and other companies who are not obliged to submit this information to Companies House. As such, in the interests of clarity, all data relating to turnover, profit and number of employees provided in this report should be regarded as independent estimates by MTW. Whilst we endeavour to attain high levels of accuracy with these estimates, they may not reflect the actual figures of a company and should therefore be treated with caution.

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, distribution channel mix, SWOT, key trends and influences, supply and distribution channel trends. 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 be 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 – Past, 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.

- **Distributors' Customers Mix – Past, Current & Future**

The report identifies the key distribution channels that drive demand for this market and provide a current, historical & future market share estimate for each. This enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. With forecasts of market share by key channels also provided, 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 profile for each company including full 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 financial health of a company.

- **Relevant Companies, 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 KITCHEN & BATHROOM DISTRIBUTORS MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Kitchen & Bathroom Distributors Market comprises of a wide range of products suitable for a variety of applications primarily within a domestic kitchen and bathroom environment. Specifically, this report reviews the UK kitchen & bathroom distributors market between 2004 and 2010 with forecasts to 2014 for:-

- **Bathroom Products** – sanitaryware, brassware, furniture, worktops, accessories etc
- **Kitchen Products** – furniture, sinks, worktops, brassware, accessories etc
- **Appliances** – Dishwashers, cookers, hobs, extractors, washing machines, refrigerators, freezers etc.
- **Shower Products** – Enclosures, trays, shower controls
- **Other Products** – fittings, plumbing accessories etc.

The combined sales of the above products are estimated to be worth some £xxx million in 2010 at distributor selling prices, reflecting a market which has experienced particularly xxx xxxxx xxxx in value in the last 2 years. A substantial proportion of kitchen and bathroom market sales in the domestic market are xxxxxxxxxxxxxxxx and as such are often a xxxxxxxxx purchase. This, coupled with a xxxxxxxxxxx in 2008 resulted in a xxxxxxx xxxxxxxx in xxxxxxxxxxx for kitchen and bathroom products throughout all channels.

The market is forecast to xxxxxxxxxxx in 2010 at distributor selling prices, reflecting a xxxxxxxxxxx and one which reflects the xxxxxxxxxxx present. Prospects for 2011 are xxxxxxxxxxx, as the xxxxxxxxxxx and xxxxxxxxxxx sector as a result of the xxxxxxxxxxx in May 2010. With stronger xxxxxxxxxxx and xxxxxxxxxxx and xxxxxxxxxxx, the market should not only experience a xxxxxxxxxxx xxxxxxxxxxx, but also a xxxxxxxxxxx xxxxxxxxxxx. By year end December 2011 our forecasts are for the market xxxxxxxxxxx %, reaching a value of xxxxxxxxxxx.

The largest sector of the kitchen & bathroom distributors market is comprised of xxxxxxxxxxx, which are currently estimated to account for around xxxxxxxxxxx of the market in 2010, reflecting a xxxxxxxxxxx at distributor selling prices. Sales of shower controls, enclosures and trays through the kitchen and bathroom distributors are currently valued at around xxxxxxxxxxx in 2010, contributing around xxxxxxxxxxx % of all distributor sales.

Kitchen products, primarily but not exclusively including furniture, worktops, sinks and brassware, are estimated to account for xxxxxxxxxxx % of the distributors market in 2010, reflecting a value of around £ xxxxxxxxxxx million.

The kitchen appliances sector of the kitchen and bathroom distributors market is currently estimated to be worth around £ xxxxxxxxxxx million in 2010, accounting for around xxxxxxxxxxx % of all distributor sales. Indications are

that this sector may xxxxxxxxxxxx share of the distributor channel in recent years as consumers have sought to xxxxxxxxxxxx, most notably the xxxxxxxxxxxx.

Our estimates are that the kitchen & bathroom specialist retailers continue to xxxxxxxxxxxx Kitchen & Bathroom Distributor sales in the UK, with an estimated share of around xxxxxxxxxxxx % in 2010. Sales of Kitchen & Bathroom products to the retailers are expected to reach just over £ xxxxxxxxxxxx million in 2010, reflecting a xxxxxxxxxxxx market, despite some share xxxxxxxxxxxx xxxxxxxxxxxx in recent years.

Our estimates are that sales to the builders and plumbers merchants will be just over £ xxxxxxxxxxxx million in 2010. Indications are that this sector may also have xxxxxxxxxxxx some share in recent years due to xxxxxxxxxxxx in a number of key sectors, coupled with the ongoing xxxxxxxxxxxx

The Internet channel is forecast to xxxxxxxxxxxx the largest share of the market in the medium to longer term, as consumers continue to xxxxxxxxxxxx – particularly in the xxxxxxxxxxxx sector. By 2014, therefore sales to these retailers are forecast to reach just under £ xxxxxxxxxxxx million, reflecting around xxxxxxxxxxxx % of total distributors' sales.

For the preceding 12 months to May 2010, our estimates suggest that more than xxxxxxxxxxxx % of the market experienced gr xxxxxxxxxxxx which could be described as 'xxxxxxxxxx', with sales xxxxxxxxxxxx by more than xxxxxxxxxxxx % per year. Further, around xxxxxxxxxxxx % of the kitchen & bathroom distributors market is estimated to have experienced some sales xxxxxxxxxxxx over the last 12 months. However, more than xxxxxxxxxxxx % of the industry experienced either xxxxxxxxxxxx or xxxxxxxxxxxx sales in the last 12 months, reflecting the xxxxxxxxxxxx.

Around xxxxxxxxxxxx % of the industry is viewed as having either an 'xxxxxxxxxx or 'xxxxxxxxxx credit rating, reflecting a xxxxxxxxxxxx xxxxxxxxxxxx in the market in terms of financial standing. However, xxxxxxxxxxxx xxxxxxxxxxxx xxxxxxxxxxxx and the impact of xxxxxxxxxxxx is also evident in the industry, with xxxxxxxxxxxx % of the sector regarded as having a xxxxxxxxxxxx xxxxxxxxxxxx rating with suppliers advised to provide xxxxxxxxxxxx these companies. At present, around xxxxxxxxxxxx % of companies active in the kitchen & bathroom distributors market are viewed as being at xxxxxxxxxxxx, reflecting a relatively large proportion of the market.

Real term xxxxxxxxxxxx is forecast to xxxxxxxxxxxx in 2011, albeit at a xxxxxxxxxxxx xxxxxxxxxxxx rate with more substantive xxxxxxxxxxxx term xxxxxxxxxxxx forecast to xxxxxxxxxxxx to the market by 2012, with rates of between xxxxxxxxxxxx % forecast to 2014. By year-end December 2014, the market is set to reach a value of £ xxxxxxxxxxxx million, reflecting levels xxxxxxxxxxxx xxxxxxxxxxxx in xxxxxxxxxxxx.

2.2 KITCHEN & BATHROOM DISTRIBUTORS MARKET SIZE & TRENDS 2004-2014

2.2.1 Kitchen & Bathroom Distributors Market Size 2004-2014 – Current Prices

The UK Kitchen & Bathroom Distributors market encompasses a wide range of products and is estimated to be worth just over £ xxx million at distributor selling prices in 2010 as illustrated in the following chart:-

Figure 1: Kitchen & Bathroom Distributors Market – UK 2004 – 2014 By Value £m

3. KITCHEN & BATHROOM DISTRIBUTOR PROFILES

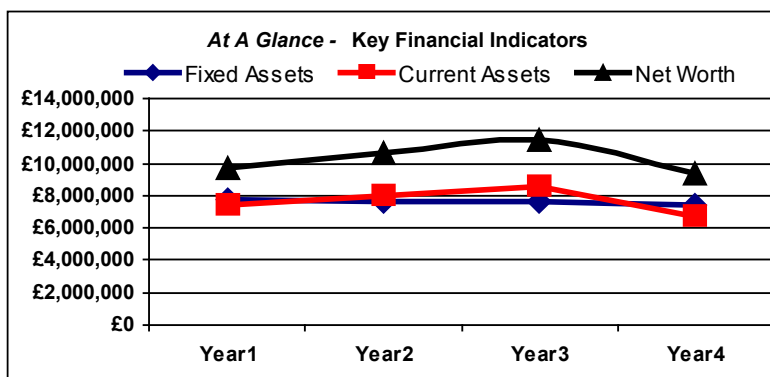
The following section identifies some of the key UK kitchen and bathroom distributors and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players in the market, inclusion or otherwise in the following section does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

4.1 Kitchen & Bathroom Distributors Profiles & KPIs

Sample Limited - Company Overview & 'At a Glance'

Sample Way
Lichfield
Staffordshire
Sample Sample
Tel: Sample

Sample Limited is a private limited with share capital company, incorporated on December 11, 1946. The company's main activities are recorded by Companies House as "Builders' merchants and the sale and distribution of domestic fittings." In 2010, the company has an estimated 160-170 employees.



To year end December 2009, Sample Limited is estimated to have achieved a turnover of around £25 million. Pre-tax profit for the same period is estimated at around £0.7 million. The following table briefly provides a top line overview on Sample Limited:-

Company Name	Sample Limited
Brief Description of Activities	Builders' merchants and the sale and distribution of domestic fittings.
Parent Company	na
Ultimate Holding Company	na
Estimated Number of Employees	160-170
Senior Decision Maker / Director	Sample Sample

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

Sample Limited - 4 Year KPIs to Year End 31-Dec-08

Key Indicator £	Year End 31-Dec-05 (Year1)	Year End 31-Dec-06 (Year2)	Year End 31-Dec-07 (Year3)	Year End 31-Dec-08 (Year4)
Fixed Assets	£7,735,000	£7,690,000	£7,584,000	£7,429,000
Current Assets	£7,429,000	£7,942,000	£8,607,000	£6,744,000
Current Liabilities	£5,078,000	£4,703,000	£4,598,000	£3,130,000
Long Term Liabilities	£322,000	£300,000	£150,000	£1,632,000
Net Worth	£9,764,000	£10,629,000	£11,443,000	£9,411,000
Working Capital	£2,351,000	£3,239,000	£4,009,000	£3,614,000
Profit per Employee	£5,131	£7,551	£5,870	£4,060
Sales per Employee	£150,142	£150,882	£158,797	£152,837

4. K&B DISTRIBUTORS CUSTOMER SHARE & TRENDS

5.1 Share by Key Customer Group for Distributors in 2010, 2004 & 2014

The share accounted for by each of the key distribution channels within the UK kitchen & bathroom distributors market in 2010 is illustrated in the following chart:-

5.4 Kitchen & Bathroom Distributors Ranking & Turnover Estimates

5.4.1 K&B Distributors Listing

The following identifies key market players active at present:-

Figure 121: K&B Distributors Company Listing

A C Toon Limited	Davroc Limited	Northern Sink Supplies Limited
A W Andes Bathrooms Limited	DBD Distribution Limited	Peachurst Limited
AB Distributors	Delphi Distribution Limited	PJH Group Holding Company Limited
Allied Manufacturing Co. (London)	DHL Bathroom Supplies Limited	Plasman (Laminate Products) Ltd
American Appliance Centre Limited	Ergomite Limited	Plyanemca Ltd
APC Distributor Ltd	F& P Wholesale (BSS Group)	Portway Domestic Appliances Limited
Arrow Distributors Limited	Farmiloe & Farmiloe (WBS)	Potter Cowan & Company Belfast Limited
Ashley Distribution Limited	Frontline Bathrooms Ltd	Power Shower Distributors Limited
Barwick of Bradford Limited	G K R Distribution Limited	PWS Distributors Limited
Bathrooms International Limited	G R Hullock (1994) Limited	Qualitex Supplies Limited
Be Modern Limited	Gardiner Distribution Ltd (Theobald's)	Quest 4 Limited
Beaufort Bathroom Distributors	Gas Appliance Distributors Limited	R K Ceramics Limited
Blackheath Products Limited	Goodwood Bathrooms Limited	Robert Lee Distribution Limited
Bodel Distributors Limited	H M James & Sons Limited	Roper Rhodes Limited
Brausch & Co UK Limited	Hatt Kitchens Limited	S D A Distributors Limited
Brent Plastics Limited	Heritage Bathrooms Limited	Scorpion Bathroom Distribution Limited
Brian Donaldson Distribution Limited	Homestyle Direct Limited	Shore Distribution Limited
Bridisco Limited	Interfab Limited	System Wessex Limited
Bristol Tile Company Limited	Ipswich Plastics Limited	Teuco UK Limited
C P Hart & Sons Limited	J P Distribution Limited	The Kitchen & Bathroom Warehouse
C R S Wholesale Cambridge Limited	Jendico Limited	TK Components
C.F.Anderson & Son Limited	Leaker Direct (Distribution) Ltd	Triflow Concepts Ltd
Capricorn Kitchen Studio Limited	Lecico PLC	Ultra Finishing Limited
CD UK Limited	Mark Two Distributors Limited	Venezia Designs Limited
Chowart Limited	Maurice Lay Distributors Limited	Walter Tipper Limited
Claygate Distribution Limited	Mekon Products Limited	Waltham Plumbing Supplies Limited
Clayton Munroe Limited	Midland Bathroom Distributors Ltd	Waterline Limited
Cooper Callas	Mike Walker Distribution Limited	West Point Distributors Limited
Cranham Group PLC	N Froy & Sons Limited	Whirlpool Express UK Limited
Danico Brass Limited	Nordic Saunas & Leisure Limited	Woodfit Limited

Source: MTW Research / Trade Sources