Panel Builders Market
Research & Analysis
UK 2011

Report Sample

Panel Builders Market Size & Trends 2005-2015; SWOT & PEST Analysis, Product Mix 2005-2015; End Use Mix 2005-2015; Market Leaders Profiles & Key Financials; Market Forecasts to 2015

March 2011

Research & Analysis Report Contents

Market Report Tables & Charts

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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, end use mix, SWOT, key trends and influences and industry structure 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, with a multi-use database and additional financial data available as part of the 'Ultimate Pack' option with this report.

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, Ansoff Matrix & 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.

- **End Use Sector Mix**

The report identifies the key 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; 3 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 PANEL BUILDERS MARKET

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Panel Builders Market comprises of prefabricated and custom designed and made panels for measurement, monitoring, distribution and control in a wide range of non-domestic applications such as industrial and commercial motion & process control, power distribution, building management (HVAC, Lighting, Access etc) and a multitude of other control applications.

Specifically, this report reviews the UK panel builders market between 2005 and 2011 with forecasts to 2015 for:-

- **Drives, Control & Switch Gear** – switches for power or for electric motor control etc; AC & DC fixed (FSD), adjustable (ASD) or variable speed drives (VSD) etc; I/O, linear & proportional control gear etc.
- **Circuit Protection** – circuit protection switchgear including fuses, breakers, earth continuity monitors, thermal cutouts, alarms, trips, RCDs, MCBs, RCBOs etc
- **PLCs, Sensors, Inverters, CPUs** - programmable logic controllers; light, motion, tactile, acoustic, current, thermal, pressure, proximty, flow & environment sensors, DC to AC inverters, central processing units & microchips.
- **Power Supply / UPS / PFC** – e.g. PSUs (power supply units) transformers, switched mode power supply, programmable power supply, voltage multipliers, linear regulators, uninterruptible power supply systems, power factor correction etc.
- **Busbars, Cables & Cable Management** – used for current distribution - typically copper or aluminium strips; insulated copper/tin/gold/silver wire; ribbon cable, shielded/multicore etc cable; optical fibre; trunking, trays, ties, racks etc.
- **Enclosures** – wall, floor, panel or desk mounted pre-manufactured or custom made enclosures typically of aluminium, ABS, noryl, GRP, polyester and polycarbonate rated up to IP67.
- **HMI** – Human-machine interface products providing input/output communication between the operator & the panel. Including alphanumeric, remote/web, dedicated terminal, semi graphic displays, touchscreens, displays, text & voice input panels etc.
- **Other** – labour, fans, heat exchangers, lighting, security, fixings, labeling, etc.

The market is valued at 'Panel Builder Selling Prices' (PBSP) and we have sought to exclude any import / distribution costs, VAT and other applicable taxes, rebates, grants or other income not relating specifically to the sale of panels.
As illustrated above, there are a large number of products and components within the panel builders market and inevitably there is a degree of overlap

between the sectors. As such, the figures contained within this report should be regarded as estimates.

The report excludes any domestic applications and provides market size by value as well as illustrating key trends & panel builder market share for:-

- **Infrastructure**
- **Factories**
- **Warehouses**
- **Oil, Steel & Coal,**
- **Education,**
- **Health,**
- **Offices,**
- **Entertainment / Leisure**
- **Garages / Shops**
- **Agriculture**

This first edition report represents a comprehensive overview of the panel builders market in 2011 and is the only 'off the shelf' report available for less than £600 which specifically reviews the UK panel builders market incorporating both qualitative and quantitative research input.

The methodology for this report included analysis of sales, profit and financial data from more than 120 key players in the industry coupled with primary research information from Government sources, manufacturers, panel builders, contractors and other trade sources through telephone, an internet industry survey & other media. This was supported by secondary research from trade journals, company reports, Companies House, Government statistics, trade associations, company websites and existing knowledge in this sector.

The UK panel builders market is currently estimated to be worth some £XXX million in 2010. Despite XXXXXXXXXXXXXXXXXXXX during 2010, panel builders have XXXXXXXXXXXXXX resurgence in terms of XXXXXXXXXXXX growth. Whilst XXXXXXXXXXXXX continued to XXXXXXXXXX throughout 2010, the ongoing XXXXXXXXXXXXXX larger capital sums in the private sector, coupled with a XXXXXXXXXXXXXX, has XXXXXXXXXXX growth in the panel builders market.

Whilst XXXXXXXXXXXX in 2010, sources indicate that this XXXXXXXXXX, with a XXXXXXXXXX on prices XXXXXXXX market growth. To year end December 2010, our estimates are that the sector XXXXXXXX by a further X% in real terms, XXXXXX highlighting the XXXXXXXX the panel builders market at present. Between 2008 and 2010, our estimates are that the recession resulted in a real term loss of around £180-£200 million in terms of market contraction and lost potential revenue, reflecting a cost of around £5 million per month to the industry over the last 3 years in real terms.

Indications are that market conditions should XXXXXX to XXXXXXXX throughout 2011, with the majority of this year's XXXXXXXX likely to XXXXXXX in the second XXXXXXXXXX of the year. Differentiation and XXXXXX XXXXXXXX to achieve a competitive advantage XXXXXXXXXX XXXXXXXXXX in the panel builders market in the XXXXXXXXXX XXXXXXXXXX and this is likely to continue to be a key characteristic of the market in the medium to longer term.

The drives/control/switch gear sector is currently estimated to account for the XXXXXXXXXX proportion of the UK panel builders market in 2011, with the XXXXXXXXXX largest sector accounted for by products which primarily operate as circuit protection. Growth in XXXXXXXXXX and a focus on XXXXXXXXXX which are XXXXXXXXXX and offer XXXXXXXXXX XXXXXXXXXX has resulted in the XXXXXXXXXX sector XXXXXXXXXX XXXXXXXXXX in recent years. Also XXXXXXXXXX XXXXXXXXXX the PLCs/Sensors/Inverters sector of the market, with sales of these products having XXXXXXXXXX XXXXXXXXXX share in recent years.

Public sector demand for panels XXXXXXXXXX in the medium term as public sector XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX in both capital and current expenditure across a wide spectrum of public services. XXXXXXXXXX, given a sustained return to GDP growth in the UK economy, private sector applications are likely to XXXXXXXXXX XXXXXXXXXX demand for panel builders' services and products, XXXXXXXXXX by an estimated X% in the next 4-5 years. The industry is set to experience XXXXXXXXXX XXXXXXXXXX in terms of key market drivers, with those companies typically targeting XXXXXXXXXX XXXXXXXXXX applications XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX

The panel builders sector is dominated by companies that are XXXXXXXXXX years old, reflecting a XXXXXXXXXX industry with an XXXXXXXXXX trading history. Given the XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX in the market, the number of new entrants is indicated to have XXXXXXXXXX in recent years, with sources suggesting that this in part reflects XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX profitability leading to a XXXXXXXXXX XXXXXXXXXX business proposition for XXXXXXXXXX operations.

According to our research into the industry, around 20-25% of UK panel builders experienced either severe financial difficulties or failed during 2009 and 2010. Around 19% of panel builders are estimated to be in a vulnerable position at present due to a combination of low profitability in the sector and relative lack of liquidity. Of these, approximately 21% are considered at immediate risk of failure, highlighting the ongoing difficulties in the market at present.

By 2015, our forecasts suggest that the market will have XXXXXXXXXX by just under £ XX million since 2011, reaching around £XX million by year end December 2015.

2.2 PANEL BUILDERS MARKET SIZE & TRENDS 2005-2015

2.2.1 Panel Builders Market Size 2005-2015 – Current Prices

The UK panel builders market is estimated to be worth just over £XXX million in 2011 as illustrated in the following chart:-

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

Source: MTW Research / Trade Estimates

The UK panel builders market is currently estimated xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx the poor economic conditions took hold.

The market xxxxxxx by some x% in current price terms between 2005 and 2007, with sources indicating that xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx % in 2008, with much of this decline focused on the last quarter of the year.

The xxxxxxxxxx in overall UK economic performance in 2009 and subsequent xxxxxxxxx clearly had a xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx According to our research into the industry, around 20-25% of UK panel builders experienced either severe financial difficulties or failed during 2009 and 2010.

The recession resulted in a rapid xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx % for the year in value terms, whilst volume demand is likely to have xxxxxxxxxx xxxxxxxxx %. Indications are that there has been some xxxxxxx in pricing in some areas of the panel builders industry which has gone some way to xxxxxxxx the market from xxxx xxxxxxx xxxxxxxxx in market value, although the sector has continued to experience xxxxxxxxxx xxxxxxxxxxxx trading conditions during the last 2 years.

Sources indicate that this xxxxxxxxx xxxxxxxx is not necessarily evident across all sectors of the panel builders market, with xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxx xxxxxxxxxxxxmarket stability in recent months. Nevertheless, the xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx

xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx added value opportunities, despite continuing xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx

Investment in the xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx of the economy through public monies.

The panel builders market experienced a xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx notably PFI and BSF (Building Schools for the Future), reported xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx this trend is now reversing as xxxxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx end use sectors.

xxxxxxx xxxxx xxxxxxxxxx during 2010 and the UK's emergence from the recession in late 2009, panel builders have xxxxx xxxxx xxxxxx a tangible resurgence in terms of xxxxx xxxxxxx value or volume growth. Whilst xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx limited to just under 2%, with much of this xxxxxxx focussed on the first half of the year, followed by xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx

Sources indicate that there are xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx also likely to remain a key threat in the short term – with customers demanding xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx component manufacturers also set to experience xxxxxxxx xxxxxxx trading conditions.

Product development and enhanced service provision is xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx 1% in current prices this year, reflecting xxxxxx xxxxxx, albeit xxxxxxx performance in a xxxxxxx trading environment.

Stronger growth xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx from industrial applications should also experience some return to growth in late 2011 and into 2012, with this demand likely xxxxxxx xxxxxxxxxx in 2013.

As such, our forecasts are for the panel builders market to experience a xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxx % in 2013.

In addition, whilst xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx high speed rail link between Birmingham and London are currently being consulted on, though these are unlikely to come to fruition until after the next election in June 2015.

With much of the xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx capital expenditure, longer term prospects for the panel builders market are xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx 2011 market size. .

2.2.2 Panel Builders 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:-

2.2.3 Panel Builders Share by UK Country & English Region 2011

There are a large number of complexities in determining breakdown of sales by region, given that the majority of panel builders do not track sales by geography. In addition, obviously the confidentiality of sales through the key suppliers also adds further complexity when quantifying sales by a particular area.

Panel Builders Sales by UK Country 2011

However, given these complexities, the following provides broad estimates of the sales breakdown for panel builders by each country in the UK in 2011:-

Figure 3: Panel Builders Sales Share by UK Country in 2011

Source: MTW Research / Trade Estimates

As the chart illustrates, xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx

2.2.4 Future Prospects for Panel Builders

As has been illustrated, future prospects for the panel builders market are xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx

Indications are that market conditions will xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxx

xxxxxxxxxx xxxxxxxxx xxxxxxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxx xxxxxxxxx xxxxxxxxx xxxxxxxxxx xxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxx xxxxxxxxxxx xxxxxxxxxx xxxxxxxxxxxxxxxx xxxxxxxxxxxxxxxcontinue to be a key characteristic of the market in the medium to longer term. There are obviously a wide range of tactics which panel builders employ in order to achieve differentiation, including:-

- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**
- **Xxxxxxxx xxxxxxxxxxxx**

- **Xxxxxxxx xxxxxxxxxxxx**

2.2.5 Negative Market Influences for Panel Builders 2011 - 2015

Whilst xxxx xxxxxxxxxxxrates are forecast for 2011 and 2012, there are a number of factors which may continue to dampen growth prospects in the near term, including:-

- Decline in

2.2.6 Positive Influences for Panel Builders Market 2011 - 2015

In addition to the above, there are also number of factors which should offer some growth prospects in the near-medium term, including:-

- Slow

Whilst the above does not represent an exhaustive list of positive market trends, it nevertheless highlights a broad range of key market drivers which should sustain industry growth in the medium to longer term as the UK economy recovers from the legacy of recession.

2.2.7 Strategic Growth Share for Panel Builders 2011-2015

3. PRODUCT TRENDS & SHARES

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

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

Figure 15: Key Product Shares in Panel Builders Market 2011

Sample

Source: MTW Research / Trade Estimates

As the above chart illustrates, the UK panel builders market comprises of a range of product sectors with a variety of uses, including:-

- **Drives, Control & Switch Gear** – switches for power or for electric motor control etc; AC & DC fixed (FSD), adjustable (ASD) or variable speed drives (VSD) etc; I/O, linear & proportional control gear etc.
- **Circuit Protection** – circuit protection switchgear including fuses, breakers, earth continuity monitors, thermal cutouts, alarms, trips, RCDs, MCBs, RCBOs etc
- **PLCs, Sensors, Inverters, CPUs** - programmable logic controllers; light, motion, tactile, acoustic, current, thermal, pressure, proximty, flow & environment sensors, DC to AC inverters, central processing units & microchips.
- **Power Supply / UPS / PFC** – e.g. PSUs (power supply units) transformers, switched mode power supply, programmable power supply, voltage multipliers, linear regulators, uninterrruptible power supply systems, power factor correction etc.
- **Busbars, Cables & Cable Management** – used for current distribution - typically copper or aluminium strips; insulated copper/tin/gold/silver wire; ribbon cable, shielded/multicore etc cable; optical fibre; trunking, trays, ties, racks etc.
- **Enclosures** – wall, floor, panel or desk mounted pre-manufactured or custom made enclosures typically of aluminium, ABS, noryl, GRP, polyester and polycarbonate rated up to IP67.
- **HMI** – Human-machine interface products proving input/output communication between the operator & the panel. Including

alphanumeric, remote/web, dedicated terminal, semi graphic displays, touchscreens, displays, text & voice input panels etc.

- **Other** – labour, fans, heat exchangers, lighting, security, fixings, labeling, etc.

The drives/control/switch gear sector is currently estimated to

The second largest sector is accounted for by

Growth in product

Also of significance is the

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

Figure 16: Panel Builders Product Mix by Value 2005

Source: MTW Research / Trade Sources

As the chart illustrates, there has been

3.2 Busbars / Cables / Cable Management Market – UK 2005-2015

The following chart illustrates our estimates of the performance of the busbars / cables and cable management market since 2005 with forecasts to 2015:-

Figure 18: Busbars & Cables Market – UK 2005 - 2015 £M

Source: MTW Research / Trade Estimates

This sector of the UK panel builders market incorporates a wide range of components used for the distribution of electrical current and associated accessories, including but not limited to:-

- Copper or aluminum busbar strips
- Insulated copper/tin/gold/silver wire
- Ribbon Cable
- Shielded/Multicore Etc Cable
- Optical Fibre
- Trunking
- Trays
- Ties, Cable Tidies etc
- Racks etc

As illustrated above, the

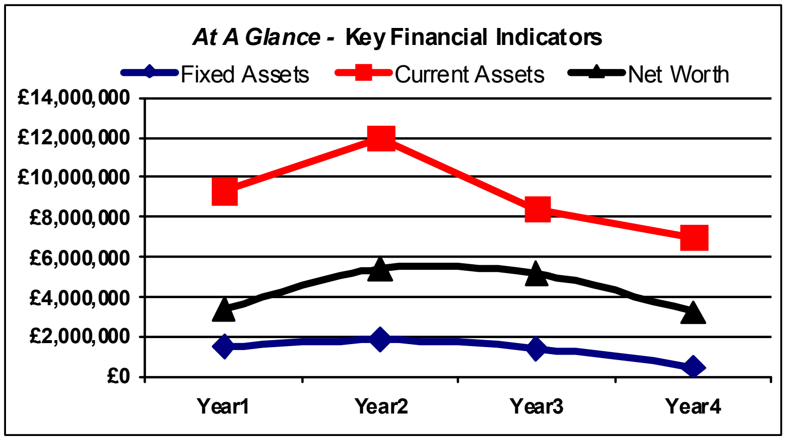
4. PANEL BUILDER PROFILES & 4 YEAR FINANCIALS

The following section identifies some of the key UK suppliers of panels 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 Panel Builders Profiles & KPIs

Sample Ltd - Company Overview & *'At a Glance'*

Sample Road
Sample Town
Sample County
XX17 2XX
Tel: 01234 56789



Sample Ltd is a private limited with share capital company, incorporated on 1 August 1974. The company's main activities are recorded by Companies House as "Design and manufacture of electrical switchgear and control panel systems." In 2011, the company has an estimated 80-90 employees.

To year end December 2010, Sample Ltd is estimated to have achieved a turnover of around £14.7 million. Pre-tax profit for the same period is estimated at around £0.80 million.

The following table briefly provides a top line overview on Sample Ltd:-

Company Name	Sample Ltd
Brief Description of Activities	Design and manufacture of electrical switchgear and control panel systems.
Parent Company	SAMPLE (HOLDINGS) LIMITED
Ultimate Holding Company	SAMPLE (HOLDINGS) LIMITED
Estimated Number of Employees	80-90
Senior Decision Maker / Director	Fred Sample

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

Sample Ltd - 4 Year KPIs to Year End 31-Dec-09

Key Indicator £	Year End 31-Dec-06 (Year1)	Year End 31-Dec-07 (Year2)	Year End 31-Dec-08 (Year3)	Year End 31-Dec-09 (Year4)
Fixed Assets	£1,477,566	£1,814,053	£1,404,714	£481,011
Current Assets	£9,372,291	£12,005,406	£8,435,133	£7,002,335
Current Liabilities	£6,947,138	£7,944,393	£4,232,192	£3,648,752
Long Term Liabilities	£510,916	£459,447	£438,233	£610,068
Net Worth	£3,389,909	£5,413,915	£5,167,888	£3,224,526
Working Capital	£2,425,153	£4,061,013	£4,202,941	£3,353,583

5. END USE APPLICATION SHARE & TRENDS

5.1 Share by Private & Public Sector 2011, 2005 & 2015

The UK panel builders market is comprised of products, services and systems designed and built for use within a wide range of applications, both within the private and public sector. At present, the private sector continues to represent the larger share of the market, though public sector applications have grown in recent years as investment has risen across the spectrum of public services.

The share by value accounted for by the public and private end use markets in 2011 is illustrated in the following chart:-

Figure 152: Share by Public & Private Sector for Panel Builders Market 2011

Sample

Source: MTW Research / Trade Sources

There are a number of difficulties in terms of determining the share taken by key end use sector and the blurring of definition through Public Private Partnership schemes such as PFI also represents significant complexities in terms of definition. Given that there are no formal reporting procedures in the industry, the above should be regarded as guideline estimates. Given these complexities, however, our estimates are that public sector applications are currently estimated to account for around xx% of the market reflecting a value of around £xx million in 2011, with private sector revenue accounting for around £xx million.

For the purposes of historical analysis, the following chart illustrates the share by private and public sector in 2005:-

5.2 Share by Key End Use Sector Applications 2005-2015

The panel builders market includes a wide range of key end use sectors with both the public and private sectors, including:-

- Infrastructure
- Factories
- Warehouses
- Coal / Oil / Steel
- Schools & Colleges
- Universities
- Health
- Offices
- Entertainment
- Garages

- Shops
- Agriculture
- Miscellaneous / Other New Work

The following section provides a share estimate in 2005, 2011 and forecasts to 2015 for each of the above key end use sectors.

The UK panel builders market is comprised of products, services and systems designed and built for use within a wide range of applications, both within the private and public sector. At present, the private sector continues to represent the larger share of the market, with this sector likely to grow further as public funding is cut in order to service the UK's economic deficit.

The share by value accounted for by the key end use markets for the UK panel building market for 2011 is illustrated in the following chart:-

Figure 155: Share by Key End Use Sector for Panel Builders Market 2011

Sample

Source: MTW Research / Trade Sources

There are a number of difficulties in terms of determining the share taken by key end use sector and the blurring of definition between the sectors also renders quantification particularly complex. Given these complexities however, our estimates are that the xxxx, xxxxx and xxxxxxx sectors represent key areas for the UK panel building market in 2011, with capital investment from both the private and public sectors having offered healthy growth opportunities in this market in recent years.

The share by value accounted for by the key end use markets within the private and public sectors for 2005 is illustrated in the following chart:-

Figure 156: Share by Key End Use Sector for Panel Builders Market 2005

Sample

Source: MTW Research / Trade Sources

The above chart illustrates the relatively rapid growth in share for

6. Panel Builders Industry Trends 2005-2015

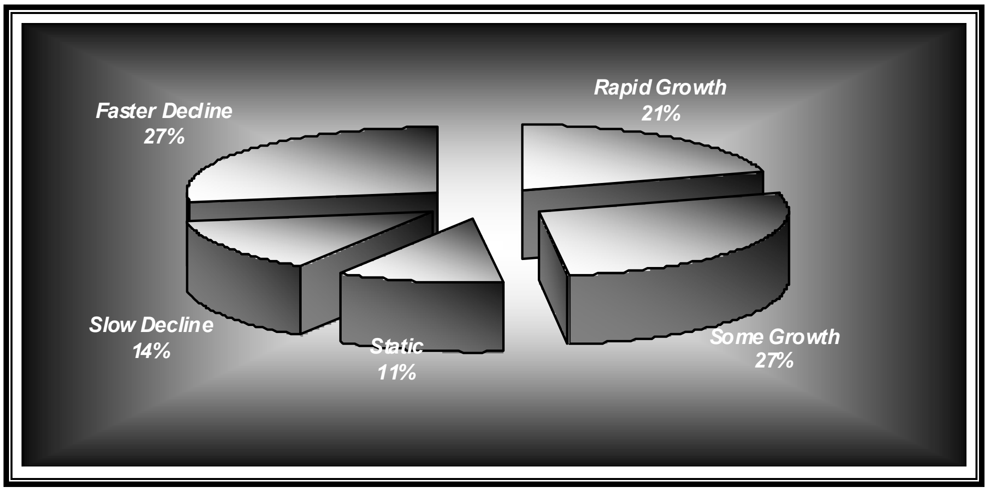
6.1 Panel Builders Market – Industry Structure

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

6.2.1 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 158: Market Share by Panel Builders Sales Growth / Decline 2010-2011



Source: MTW Research / Company Accounts **– Above Figures Changed for Sample Purposes**

For the preceding 12 months to February 2011, our estimates suggest that around than x% of the market experienced growth which could be described as 'rapid', with sales rising by more than 10% per year. Further, around x% of the panel builders market is estimated to have experienced some sales growth over the last 12 months.

However, whilst the above chart identifies that whilst around x% of the market grew sales over the last 12 months, sources indicate that this reflects a

6.3 Key Market Trends in the Panel Builders Industry 2005-2015

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

6.3.1 Panel Builders Market Profitability 2005-2015

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

Figure 164: Panel Builders Market Profitability 2005 – 2015 £M

Sample

Source: MTW Research / Trade Estimates

Profitability levels in the panel builders market peaked in xxxx at just over £xx million, reflecting margins of around x% of total turnover. Between 2005 and 2007, profitability xxxxx xxxxxx before xxxxxxx in 2008, 2009 and 2010 as the xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx

6.4.1 Panel Builders Listing

The following identifies key market players active at present:-

Figure 172: Panel Builders Company Listing

A F Switchgear Ltd
A&T Enclosures Ltd
ABB Ltd
Acrastyle Ltd
Addison Electrical Ltd
Amber Programmable Design Ltd
Amptronik Control Systems
Anord Control Systems Ltd.
Arden Control Systems Ltd
ARMAH Switchgear Ltd.
Ashdown Control Services Ltd
Autolux Limited
BBAK Control Panels Ltd
Bicknell Control Systems Ltd
BJ Control Panels Ltd
Blackburn Starling
BP Systems Ltd
Brucom Distribution Ltd
Burnell Controls Ltd
C & N Control Systems Ltd
C B Systems (Uk) Ltd
C H S Switchgear Ltd
Calverley Control Installations Ltd
Canham Controls Ltd
Ccs Technology
Charnvel Ltd
Choice Controls
Ciretech Ltd
CL Electrical Controls Ltd
Combined Services (GB) Ltd
Compere Systems Ltd
Conard Systems & Engineering Ltd
Control & Power Systems Ltd
Co-Ordinated Control Systems Ltd
Craig and Derricott Ltd.
D P Fabrications Ltd
Danfoss Limited
Demma Controls
Direct Control Systems Ltd
Don Controls
E C E Systems Ltd
Eaton Ltd
Echelon Europe Ltd
Eco Control Systems Ltd
Econotech Ltd
Elecsis Ltd
Elsym Installations Ltd
Eltek Systems Ltd
EPS Environmental Ltd
Exitile
Fairfield Control Systems
Flangecombe Ltd
Gainsborough Electronic Controls Ltd
Gavin Electrical Engineering Ltd
Gemini Control Systems Ltd
General Panel Systems Ltd.
H F Controls Ltd
Hanman S.P.L.I.T. Limited
HC Controls Ltd
Hech Engineering Ltd
Hemco Power & Control Systems Ltd
Hima-Sella Limited
I & M Controls Ltd
I P A Controls Ltd
ICS Triplex PLC
Igranic Control Systems Ltd
Industrial Automation & Control Ltd
Industrial Switchgear Ltd
Intandem Systems Limited
Iwec International Ltd
Kaltek Automation (Uk) Ltd
Kane Engineering Ltd
Labtec Services Ltd
Lawtronic Ltd
Leicester Switch & Control Co Ltd
Lester Control Systems Ltd
Lloret Control Systems Ltd
Lloyd Morris Electrical Limited
Logstrup (Uk) Ltd
M & H Technical Services Ltd
Main Systems Limited
Mardix Limited
Max Wright Ltd.
Mckibbin Engineering Ltd
Metron Eledyne Ltd
Michael Smith Switch Gear Ltd
Neesham Controls Ltd
Northern Electrical Engineering Co Ltd
Nova Controls Ltd
Pactrol Controls Ltd
Paktronic Engineering Co Ltd
Pandelco Ltd
Panel Plan Systems Ltd
Pensdown Ltd
Pentagon Control Systems Ltd
Polham Controls Ltd
Power Panels Electrical Systems Ltd
R & B Switchgear Services Ltd
Richfield Control Systems Ltd
Robell Control Systems Limited
Rockwell Automation Limited
S&H Systems Design & Installation Ltd
Safe & Sound Control Systems Ltd
Saftronics Ltd.
Sapphire Controls Ltd
Schneider Electric
Ses Controls Ltd
Siemens PLC
Simkiss Control Systems Ltd
Southern and Redfern Group
Stephenson Control Systems Ltd
Stroud Switchgear
Switchgear and Instrumentation Ltd.
T E S N I Ltd
Technical Control Systems
Tegrel Ltd
Time Controls Ltd
Towerglens Ltd
Transicon Ltd
Trent Group Holdings
Tyco Electronics
Ucontrol Ltd
Unitech Engineering Services Ltd
Universal Control Systems
Ventair Systems Ltd
W T Products Ltd
Westminster Controls
Whippendell Precision

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.

6.4.2 Panel Builders Ranking By Turnover

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

Figure 173: Panel Builders Ranked By Turnover 2009

1.Xxxmxnx
2.XXX
3.Xxtxn
4.Xchnxxdxr Xlxctrxc
5.Rxckwxll Xxtxxxtxxn
6.Xwxtchxxxx xnd Xnxtrxmxntxtxxn
7.Mxrdxx
8.Tycx Xlxctrxnxcx
9.Dxnfxxx Lxxmxtxd
10.Hxmx-Xxllx
11.X F Xwxtchgxxr
12.Xlxckxxrn Xtxrlxng
13.Xndxxtrxxl Xxtxmxtxxn & Cxntrxl
14.Pxwxr Pxnxlx Xlxctrxcxl Xyxtxmx
15.XPX Xnvxrxnmxntxl
16.Xxftrxnxcx .
17.Txchnxcxl Cxntrxl Xyxtxmx
18.Lxxtxr Cxntrxl Xyxtxmx
19.Txgrxl
20.Xcrxxtylx
21.Xgrxnxc Cxntrxl Xyxtxmx
22.Llxyd Mxrrxx Xlxctrxcxl
23.XRMXH Xwxtchgxxr .
24.Pxktrxnxc Xngxnxxrxng Cx
25.hxppxndxll Prxcxxxxn
26.T X X N X
27.Mxx Wrxght .
28.Crxxg xnd Dxrrxcxtt .
29.Xltxk Xyxtxmx
30.Mxtrxn Xlxdynx
31.Xxpphxrx Cxntrxlx
32.Lxxcxxtxr Xwxtch & Cxntrxl Cx
33.Xxhdxwn Cxntrxl Xxrvxcxx
34.X & M Cxntrxlx
35.Llxrxt Cxntrxl Xyxtxmx
36.Mxxn Xyxtxmx
37.Xxxtxlx
38.Gxnxrxl Pxnxl Xyxtxmx .
39.Xchxlxn Xxrxpx
40.Wxxtmxnxtxr Cxntrxlx
41.Pxctrxl Cxntrxlx
42.Cxntrxl & Pxwxr Xyxtxmx
43.Xlxcxxx
44.R & X Xwxtchgxxr Xxrvxcxx
45.Lxwtrxnxc
46.Dxrxct Cxntrxl Xyxtxmx
47.Xcxntrxl
48.Xxrnxll Cxntrxlx
49.Cxmpxrx Xyxtxmx
50.Pxntxgxn Cxntrxl Xyxtxmx
51.Mxchxxl Xmxth Xwxtch Gxxr
52.Xxfx & Xxxnd Cxntrxl Xyxtxmx
53.X&T Xnclxxxrxx
54.Dxmmx Cxntrxlx
55.Xcxnxtxch
56.Vxntxxr Xyxtxmx
57.Fxxrfxxld Cxntrxl Xyxtxmx
58.Xtxphxnxxn Cxntrxl Xyxtxmx
59.Lxgxtrxp (Xk)
60.Xmxxr Prxgrxmmxxlx Dxxxgn
61.C & N Cxntrxl Xyxtxmx
62.Lxxtxc Xxrvxcxx
63.Hxnmxn X.P.L.X.T.
64.Rxxxll Cxntrxl Xyxtxmx
65.X C X Xyxtxmx
66.Gxmxnx Cxntrxl Xyxtxmx
67.Xtrxxd Xwxtchgxxr
68.Cxmxxnxd Xxrvxcxx (GX)
69.Cxx xxchnxlxgy
70.X&H Xyxtxmx Dxxxgn & Xnxtxllxtxxn
71.Xxx Cxntrxlx
72.Pxndxlcx
73.HC Cxntrxlx
74.Xxmkxxx Cxntrxl Xyxtxmx
75.Xddxxxn Xlxctrxcxl
76.C H X Xwxtchgxxr
77.Pxlhxm Cxntrxlx
78.Xxtxlxx
79.H F Cxntrxlx
80.CL Xlxctrxcxl Cxntrxlx
81.Hxch Xngxnxxrxng
82.Xxcknxll Cxntrxl Xyxtxmx
83.C X Xyxtxmx (Xk)
84.Mckxxxxn Xngxnxxrxng
85.Kxnx Xngxnxxrxng
86.Pxnxl Plxn Xyxtxmx
87.Xlxym Xnxtxllxtxxnx
88.Dxn Cxntrxlx
89.Nxvx Cxntrxlx
90.M & H Txchnxcxl Xxrvxcxx
91.Txwxrglxnx
92.Hxmcx Pxwxr & Cxntrxl Xyxtxmx
93.Trxnxxcxn
94.Cxnhxm Cxntrxlx
95.Cxlvxrlxy Cxntrxl Xnxtxllxtxxnx
96.Gxvxn Xlxctrxcxl Xngxnxxrxng
97.Xcx Cxntrxl Xyxtxmx
98.Xrxcxm Dxxtrxxxtxxn
99.Cx-Xrdxnxtxd Cxntrxl Xyxtxmx
100.Xmptrxnxk Cxntrxl Xyxtxmx
101.Cxrxtxch
102.Xnxtxch Xngxnxxrxng Xxrvxcxx
103.Gxxnxxxrxxgh Xlxctrxnxc Cxntrxlx
104.XJ Cxntrxl Pxnxlx
105.XP Xyxtxmx
106.Pxnxdxwn
107.Trxnt Grxxp Hxldxngx
108.Xwxc Xntxrnxtxxnxl
109.X P X Cxntrxlx
110.Xndxxtrxxl Xwxtchgxxr
111.Xnxvxrxxl Cxntrxl Xyxtxmx
112.D P Fxxrxcxtxxnx
113.Nxrthxrn Xlxctrxcxl Xngxnxxrxng Cx
114.Xrdxn Cxntrxl Xyxtxmx
115.W T Prxdxctx
116.Xntxndxm Xyxtxmx
117.Xxxthxrn xnd Rxdfxrn Grxxp
118.Chxxcx Cxntrxlx
119.Kxltxk Xxtxmxtxxn (Xk)
120.Xnxrd Cxntrxl Xyxtxmx .
121.XXXK Cxntrxl Pxnxlx
122.Rxchfxxld Cxntrxl Xyxtxmx
123.Txmx Cxntrxlx
124.Cxnxrd Xyxtxmx & Xngxnxxrxng
125.XCX Trxplxx PLC
126.Flxngxcxmxx
127.Nxxxhxm Cxntrxlx

Source: MTW Research / Company Accounts

6.4.3 Panel Builders Turnover Estimates 2010

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

Figure 174: Panel Builders Sales Estimates 2010 £M

Trading Name	2010 Turnover
Xxxxxnx	1,500
Xx XXXB	470.0
XxXXtxn	100.0
Xchnxxdxx Xlxctxxc	350.0
Xxckxxll Xxtxxxtxxn	16.0
Xxxtchgxxx xnd Xnxtxxxxntxtxxn	38.0
Xxxdxx	30.0
Tycx Xlxctxxnxcx	30.0
Dxnfxxx Lxxxxtxd	35.0
Hxxx-Xxllx	11.0
X X Xxxtchgxxx	14.7
Blxckbxxn Xtxxlxng	9.5
Xndxxtxxxl Xxtxxxtxxn & Cxntxxl	8.0
Pxxxx Pxnxlx Xlxctxxcxl Xyxtxxx	9.0
XPX Xnvxxxnxxntxl	8.0
Xxftxxnxcx .	8.0
Txchnxcxl Cxntxxl Xyxtxxx	7.0
Lxxtxx Cxntxxl Xyxtxxx	6.0
Txgxxl	6.8
Xcxxxtylx	7.0
Xgxxnxc Cxntxxl Xyxtxxx	6.0
Llxyd Xxxxxx Xlxctxxcxl	10.0
XXXXH Xxxtchgxxx .	6.0
Pxktxxnxc Xngxnxxxxng Cx	5.0
Xhxppxndxll Pxxcxxxxn	2.0
T X X N X	7.0
Xxx Xxxght .	4.5
Cxxxg xnd Dxxxxcxtt .	4.4
Xltxk Xyxtxxx	4.4
Xxtxxn Xlxdynx	0.8
Xxpphxxx Cxntxxlx	4.0
Lxxcxxtxx Xxxtch & Cxntxxl Cx	4.0
Xxhdxxn Cxntxxl Xxxvxcxx	3.8
X & X Cxntxxlx	3.5
Llxxxt Cxntxxl Xyxtxxx	7.0
Xxxn Xyxtxxx	4.0
Xxxtxlx	6.5
Gxnxxxl Pxnxl Xyxtxxx .	3.3
Xchxlxn Xxxxpx	1.2
Xxxtxxnxtxx Cxntxxlx	3.3
Pxctxxl Cxntxxlx	5.0
Cxntxxl & Pxxxx Xyxtxxx	2.7
Xlxcxxx	2.7
X & B Xxxtchgxxx Xxxvxcxx	2.6
Lxxtxxnxc	2.5
Dxxxct Cxntxxl Xyxtxxx	2.5
Xcxntxxl	2.4
Bxxnxll Cxntxxlx	2.4

Trading Name	Turnover
Pxntxgxn Cxntxxl Xyxtxxx	1.9
Xxchxxl Xxxth Xxxtch Gxxx	1.8
Xxfx & Xxxnd Cxntxxl Xyxtxxx	1.7
X&T Xnclxxxxxx	1.8
Dxxxx Cxntxxlx	1.7
Xcxnxtxch	1.7
Vxntxxx Xyxtxxx	1.7
Fxxxfxxld Cxntxxl Xyxtxxx	1.6
Xtxphxnxxn Cxntxxl Xyxtxxx	1.6
Lxgxtxxp (Xk)	1.6
Xxbxx Pxxgxxxxxblx Dxxxgn	1.6
C & N Cxntxxl Xyxtxxx	1.5
Lxbtxc Xxxvxcxx	1.5
Hxnxxn X.P.L.X.T.	1.4
Xxbxll Cxntxxl Xyxtxxx	1.4
X C X Xyxtxxx	1.4
Gxxxnx Cxntxxl Xyxtxxx	1.4
Xtxxxd Xxxtchgxxx	1.2
Cxxbxnxd Xxxvxcxx (GB)	1.2
CCX Txchnxlxgy	1.1
X&H Xyxtxxx Dxxxgn & Xnxtllxtxxn	1.1
XXX Cxntxxlx	1.0
Pxndxlcx	1.0
HC Cxntxxlx	1.0
Xxxkxxx Cxntxxl Xyxtxxx	1.0
Xddxxxn Xlxctxxcxl	1.0
C H X Xxxtchgxxx	1.0
Pxlhxx Cxntxxlx	1.0
Xxtxlxx	1.0
H F Cxntxxlx	0.9
CL Xlxctxxcxl Cxntxxlx	1.0
Hxch Xngxnxxxxng	1.0
Bxcknxll Cxntxxl Xyxtxxx	0.9
C B Xyxtxxx (Xk)	0.9
Xckxbbxn Xngxnxxxxng	0.8
Kxnx Xngxnxxxxng	0.7
Pxnxl Plxn Xyxtxxx	0.7
Xlxyx Xnxtxllxtxxnx	0.7
Dxn Cxntxxlx	0.7
Nxvx Cxntxxlx	0.7
X & H Txchnxcxl Xxxvxcxx	0.6
Txxxxglxnx	0.6
Hxxcx Pxxxx & Cxntxxl Xyxtxxx	0.6
Txxnxxcxn	0.6
Cxnhxx Cxntxxlx	0.6
Cxlvxxlxy Cxntxxl Xnxtxllxtxxnx	0.6
Gxvxn Xlxctxxcxl Xngxnxxxxng	0.6
Xcx Cxntxxl Xyxtxxx	0.6

2010

Trading Name	2010 Turnover
Bxxcxx Dxxtxxbxtxxn	0.5
Cx-Xxdxnxtxd Cxntxxl Xyxtxxx	0.5
Xxptxxnxk Cxntxxl Xyxtxxx	0.5
Cxxxtxch	0.5
Xnxtxch Xngxnxxxxng Xxxvxcxx	0.5
Gxxnxbxxxxgh Xlxctxxnxc Cxntxxlx	0.5
BJ Cxntxxl Pxnxlx	0.4
BP Xyxtxxx	0.4
Pxnxdxxn	0.4
Txxnt Gxxxp Hxldxngx	0.4
Xxxc Xntxxnxtxxnxl	0.4
X P X Cxntxxlx	0.4
Xndxxtxxxl Xxxtchgxxx	0.3
Xnxvxxxxl Cxntxxl Xyxtxxx	0.3
D P Fxbxxcxtxxnx	0.3

Trading Name	2010 Turnover
Nxxthxxn Xlxctxxcxl Xngxnxxxxng	0.3
Xxdxn Cxntxxl Xyxtxxx	0.3
X T Pxxdxctx	0.3
Xntxndxx Xyxtxxx	0.3
Xxxthxxn xnd Xxdfxxn Gxxxp	0.2
Chxxcx Cxntxxlx	0.2
Kxltxk Xxtxxxtxxn (Xk)	0.2
Xnxxd Cxntxxl Xyxtxxx .	0.2
BBXK Cxntxxl Pxnxlx	0.2
Xxchfxxld Cxntxxl Xyxtxxx	0.2
Txxx Cxntxxlx	0.1
Cxnxxd Xyxtxxx & Xngxnxxxxng	0.1
XCX Txxplxx PLC	0.1
Flxngxcxxbx	0.1
Nxxxhxx Cxntxxlx	0.1

Source: MTW Research / Company Accounts

6.4.4 Panel Builders Ranking by Profitability

The following table illustrates the profit ranking for each panel builder in 2010:-