

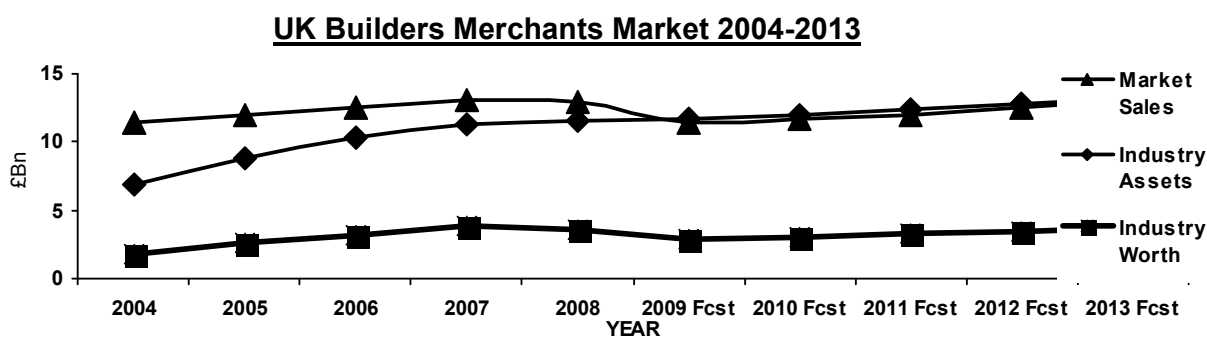
Builders Merchants Market Report UK 2009-2013

MTW Research have published a brand new "Builders Merchants Market *Rank & Profile*" Report for 2009, providing a strategic **market review**, **trend analysis**, Builders Merchants **rankings & sales** and **company profiles** in a unique, easy to use and cost effective publication. The report is now available to companies supplying to, and operating in the Builders Merchants industry.

Based on company sales returns from more than 90% of the UK Builders Merchant industry, this new report reviews market performance from 2004 to 2009 providing size, performance and key market trends in recent years, coupled with forecasts to 2013. The report also provides sales estimates for each company, alongside rankings and key performance indicators, providing an insightful and perceptive review of the industry. Comprehensive contact, telephone and mailing details are also provided as part of the 'ultimate pack' for more than 220 leading merchants, resulting in a comprehensive & effective sales and marketing tool which also offers excellent value for money.

This 270+ Page Report Features:-

- Builders Merchants Market **Sales & Trends** 2004-2009, Recession Impact, Industry Polarisation
- Market Sales **Forecasts & Key Issues** 2009-2013, Key Issues Impacting Recovery
- Builders Merchants Market **Total Profit, Worth, Assets & Borrowing** 2004-2013
- **Sales Estimates** for Each Company in 2008, Enabling Market Share Assessment.
- **Overall Market Shares** by Performance, Size, Credit Rating, Office Type, Region
- **Industry Averages** 2004-2013 – Turnover, Net Worth, Profitability, Liabilities, Assets etc.
- **UK Builders Merchants Ranked** by Turnover, Profit, Assets, Net Worth etc.
- **Financial Profile** for each Builders Merchant included, with 'at a glance' financial health chart.
- **Full Mailing Details & Senior Decision Maker Sales Leads** Provided.



Key Benefits Of This Brand New Report Include:-

- **Current, Historical & Future Market Performance & Trends 2004-2013**
- **Identify and Target** New / More Lucrative Clients & Develop Sales Strategies
- Quickly & Efficiently Develop **Sales Leads** & Focus Your Marketing
- Develop Individual **Sales & Market Shares** for the Builders Merchants
- Identify The **Ranking, Performance & Financial Health** of the Leading Builders Merchants
- Understand Recent, Current & Future **Sales & Profitability Trends**

This unique report represents a **comprehensive yet cost effective** tool for understanding the current and future performance of the UK Builders Merchants. Based on sales & primary research & written specifically for building products & materials manufacturers & suppliers, this easy to use, independent market report represents an invaluable yet cost effective tool to increase sales to, or in the Builders Merchants Market.

Key Features Of This 270+ Page Report Include:-

MARKET & INDUSTRY TRENDS 2004-2013

- **Trends in Builders Merchants Market 2004-2013, including**
 - Total **Market Sales** 2004 – 2009, Forecasts to 2013, Recession & Recovery
 - Market **Share by Growing, Declining & Static** Sales Companies in 2009
 - Market Share **Mix by Employees, Location & Turnover** Size in 2009
 - Market **Mix for Credit Worthiness & Ratings** in 2009
 - **Total Profit** 2004 – 2013 for Companies, Inflation Impact, Future Prospects
 - Total **Assets, Liabilities & Net Worth** of Builders Merchants 2004-2013
 - **“Average” Builders Merchants Profile** 2004-2013 – Turnover & Profit
 - Industry Averages 2004-13 - Assets, Debts, Net Worth & Sales per Employee

RANKINGS

- **The Builders Merchants...**
 - Ranked by **Sales Turnover** in 2008 – Sales for each company to determine market share
 - Each Company **Ranked by Profit**
 - Ranked by Combined **Current & Fixed Assets**
 - Industry Position by **Net Worth Estimates, Number of Employees**

PROFILES

- **1 Page Financial Profile for 220+ Leading Builders Merchants, including...**
 - Full, Registered Postal Address & Senior Decision Maker / Director Name
 - Company Type (e.g plc, private etc), Brief Description of Activities
 - 4 Years Balance Sheet of Assets, Borrowing & Net Worth
 - 4 Years of Sales per Employee & Profit per Employee (where reported)
 - Turnover & Profit Estimates Given Where Accounts Not Reported
 - Number of Employees – estimated where not reported.

Available as Part of the Ultimate Pack:-

- **Comprehensive Data Spreadsheet & Multi-Use Mailing List, including...**

Mailing List	Data Spreadsheet
<ul style="list-style-type: none"> • 220+ Leading Builders Merchants Mailing List • Full Company Name & Postal Address • Telephone Numbers • Senior Decision Maker / Purchasing Contact • Multi-Use – No limitations on how the data can be used • Full Data Compliance – Supplied in MS Excel format 	<ul style="list-style-type: none"> • Company Name, Address, Tel & Fax, Director Name • 4 Years Latest Accounts & Balance Sheet <ul style="list-style-type: none"> – Turnover, profit, assets – Debts, net worth, – Sales per employee, profit per employee, working capital • Parent Company, Ultimate Holding Company • Turnover Estimates for every Company in Report • Incorporation Date • Number of Employees • Data for all Companies Included in the Report

Ultimate Pack also includes Report in Hard Copy, by Email and on CD-Rom with Mailing List & Spreadsheet Supplied in MS Excel on CD-Rom

Report Synopsis:-

There are now indications that the UK economy is beginning to recover from the recent global financial crisis, with business and consumer confidence slowly returning in a number of key end use sectors. Sources within the builders merchants industry indicate a degree of optimism returning to the market, led by public sector projects, domestic RMI activity and increasingly, the housebuilding sector. Nevertheless, this optimism remains cautious, with a number of remaining downsides in the market cited which are likely to dampen any prospect of rapid value growth in the short term, particularly given the likelihood of a cut in public capital expenditure in the near term.

The builders merchants market has polarised in recent months, as larger merchants seek to protect operating margins whilst others focus on turnover to generate cash flow. Some of the larger nationals have actively sought to reduce their activity on lower margin, volume contracts and focus more on profitability. This has resulted in the smaller regional merchants being more able to compete on price in higher volume contracts and willing to focus on turnover rather than margin, fulfilling the demand left by the national merchants.

This second edition quantitative report (confidence level of 99% +/-3%) is based principally on company sales returns and balance sheets, supported where appropriate by additional primary research from the industry and secondary data and was written by qualified marketing professionals with experience of researching all aspects of the UK Building Products Industry.

Companies Ranked & Profiled in the Report:-

A K Timms & Sons	Chandlers Building	Hackney Building Supplies	Kington Building Supplies	P A Secombe & Son	South Acton Timber
A Thompson & Sons	Chapel DIY Centre	Haley Roe	Lawsons (Whetstone)	P G R Timber	Southern Brick Building
A W Lumb Northern	Chas Lowe And Sons	Hall & Rogers	Lee Bros	P Mcdermott & Sons	Spiller & Webber
A.E Spink	Builders Merchants	Halls Group	Leiston Building Supplies	Parker Building Supplies	Spring Lane Builders
Acrelane Builders Merchants	Chesworth Building	Heating Plumbing Supplies	Limavady Building Suppliers	Parr Rochdale	Merchants
Adrian White	Christies	Hendricks Lovell	M & J Mahoney & Sons	Pegasus Group (UK)	Springvale E P S
Ainscough	Churchley Bros	Henlow Building Supplies	M K M Building Supplies	Phoenix Merchants	Stanley John
Alfred Groves & Sons	Civil Solutions	Henry Alty	Driffield	Plastic Building Supplies	Sydenhams
Allendale Building Supplies	Collier & Catchpole	Hevy Building Supplies	M Laurier & Sons	Plastic Pipe Supplies	T Crossing & Co
Allmat (East Surrey)	Compass Reclaims	Highland Steel & Building	M Markovitz	Plumbase	Taggart & Co
Alsford Timber	Construction Supplies	Supplies	M.P Moran & Sons	Putney Builders Merchants	Tamar Trading Co
Ashmead Building Supplies	County Building Supplies	Homefit	Macinnes Bros	R & J Builders Hardware	Tencate Geosynthetics
Aw Champion	Crompton Building Supplies	Howarth Timber & Building	Manjits	R & J Ince	Tiger Timber
B Mcnamee & Co.	D B S Building Supplies	Hughes Forrest	Manningham Concrete	R F Amies Kidderminster	Tipadel
Barhaul (2003)	Darlaston	Huthwaite Roofing Supplies	Marshmoor Bricks	R S Beaver	Tiptree Building Supplies
Beatsons Building Supplies	David Cover & Son	Huws Gray	Masonry Solutions UK	Ranton Building Supplies	Totem Timber
Beesley & Fildes	Dry Lining Supplies	Irwin & White	Meakin Building Supplies	Rawle Gammon & Baker	Towcester Building Supplies
Blanchford & Co	Dutton & Peters	J & P Building Systems	Mechanical & Electrical	Ray Grahams	Towy Works
Bolt Building Supplies	E H Smith	J Medler	Merritt & Fryers	Richard Williams Deganwy	Travis Perkins Plc
Boys & Boden	Easter Ross Building	J T Dove	MKM Building Supplies	Richmond Building Products	Tudors Building Supplies
Bradfords Building Supplies	Supplies Co	Jackson Building Centres	Multi-Quip	Ridgeon Group	Ultra Building Products
Brick Centre	Elliott Brothers	James Burrell	Murdock Builders Merchants	Robert Dickie & Sons	Viking Hardware
Brick Store	English Bros	James Wilby Builders	Murdock Building Supplies	Robert Price Builders	W & H S Emery Co
Browning Jones & Morris	Ernest Bentley & Sons	Merchants	Naifast	Merchants	W J Odds
Browns Builders Merchants	Fairalls Builders Merchants	Jewson	Nailsea Builders Merchants	Ron Sammons	Wacher & Co
BSS Group	Franklin Sussex	JKM Industrial Supply	Naylor Drainage	Roofing Supplies	Walkers The Bldrs Mehants
Builders Supplies Wt Coast	G H Supplies (London)	John A Stephens	Newry Building Supplies	Rose Of Jericho	Walton Tipper
Builders Supply (Kendal)	G Webb Aggregates	John Fleming & Co	Nicholls & Clarke	Rubery Building Supplies	Wilderwood Aggregates
Builders Supply Co.	George Bence & Sons	John George & Sons	North Staffs Builders	Salisbury & Wood	William Way Godstone
Builders Supply Stores	George Lines (Merchants)	John Shilliday	Merchants	Samuel Kirk (Builders	William Williams
Building Supplies	George Tufts & Son	John W Grant & Son	Northern Timber Merchants	Merchants)	Willis Builders Merchants
Bussens & Parkin	Gibbs And Dandy Limited	Jones & Shuffs Heavyside	Nu-Line	Screwfix Direct	Wollens
Busy Bee Builders Merchants	Go Interiors	JP Corry Group	One Stop Building Materials	SDG Building Accessories	Wolsey UK
C & S Builders Merchants	GPB Builders Merchants	Jubilee Building Supplies	Direct	SEAC	Woods Building Supplies
C & W Berry	Grafton Merchancing	Keith Builders Merchants	Orpington Timber & Building	Seccombe Builders	WTB Holdings
C. Brewer & Sons	Grant & Stone	Kellaway Building Supplies	Supplies	Merchants	
Carfagu Products	Grant Haze London	Kent Blaxill Co	Oswald Record Plant Sales	Sehmi Builders Merchants	
Canvey Supply Co.	H A C Catherwood	Kent Building Plastics	Oxford Builders Merchants	Shropshire	
Cartmore Building Supply	H Butterfield	Kingdons	Owen Tatton	Sidalls Bicester	
Cawarden Brick & Tile Co	H E Olby & Co	Kings Langley Building	P & R Building Supplies	Smith & Frater	

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(1 Page Financial Profile for Each Company)
Including:-

Full Address, Director Name, 'At a Glance' Financial Indicator Chart, Parent, Incorporation Date, Key Financial Performance Indicators including turnover & profit estimate where not reported – see the sample on the website for more detail.

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