

**Builders Merchants
Market
Rank & Profile UK 2008**

Example Report

Builders Merchants Industry 2004-2012, Merchants Ranking & Profiles, Industry Averages for Sales, Profitability & Key Financials 2004-2012.

May 2008

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This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

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Estimates Provided

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 and medium sized 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.

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MTW Research *Rank and Profile* reports are designed to provide the reader with an independent, comprehensive overview of the current and recent trading conditions within their respective markets in an easy to use and easy to disseminate format.

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This report enables the reader to undertake

- **Fast and Effective Customer or Competitor Analysis**

With the report providing an Industry Overview with industry sales totals, sales averages and forecasts to 2012; Ranking section; and a more detailed Profile section, the depth and range of analysis provides a comprehensive overview of the market's performance and estimated ranking for each company included in the report. Each company has a 1 page key financial indicators profile providing crucial competitor analysis on which to base further research and strategic decision making.

- **Benchmark & Monitor your Company's Performance against the Industry.**

3 years of the most recent accounts available, supported where appropriate by our own estimates, is supplied for each company enabling the reader to understand the position of your company in the market and gauge its performance against your competitors in recent years.

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- **Track and Monitor Your Closest Competitors' Financial Performance.**

Key financial data are provided for every company listed for the last 3 years, enabling the reader to quickly and effectively track your competitor's performance in recent years, providing an excellent foundation on which to base further SWOT analysis to provide a comprehensive review of your competitive environment.

- **A Company Listing More Relevant to Your Market**

MTW Research have been researching and writing market reports in this industry since 1999 and as such we are able to develop a company listing which is more relevant to your chosen market, saving you time and money.

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The ranking section of this report, coupled with the provision of key financial data such as assets, liabilities and net worth for the last 3 years in the Profiles section, enables the reader to quickly identify possible acquisition targets.

- **Save Your Company's Time & Money**

MTW's *Rank & Profile* reports don't bombard you with irrelevant financial data, they are designed to enable you to engage in fast and effective market and competitor analysis. We focus on providing what's important in an easy to reference and use format.

2. Builders Merchants Industry

2.1 Introduction to this Rank & Profile Report

In order to provide an easy to use tool for the basis of a market and customer / competitor analysis study, this report provides the following information:-

Industry Overview 2004-2012

Overview of the industry's performance 2004-2007 and forecasts to 2012, including:-

- Total Industry Sales Turnover 2004-2012
- Total Industry Profitability
- Combined Industry Assets & Liabilities
- Total Industry Net Worth

Average Merchant Performance 2004-2012

A Profile of the 'Average' supplier in the industry, enabling effective and fast comparisons:-

- Average Supplier Revenue 2004-2012
- Average Supplier Profit Levels 2004-2012
- Average Assets & Liabilities 2004-2012
- Average Net Worth 2004-2012
- Average Value of Sales per Employee 2004-2012

Merchant Ranking

Provided for the leading companies in tabular format:-

- By Turnover & Individual Sales Revenue Estimates for 2007
- By Profit
- By Total, Combined Assets
- By Net Worth
- By Number of Employees

Merchant Profile

Financial data and estimates provided for the last 3 years of trading for every company:-

- Turnover & Profit estimates for every company listed for 2007
- Debtors Value (i.e. money owed to company each year over the last 3 years)
- Fixed Assets (e.g value of land, buildings, vehicles, equipment etc)
- Current Assets (i.e cash & other assets to be sold within 1 year)
- Current Liabilities (i.e debts or obligations due in 1 year)
- Long Term Liabilities (i.e debts or obligations which extend beyond 1 year)
- Net Worth (i.e total assets less total liabilities)
- Brief Description of Activities
- Full Registered Address & Postcode
- Incorporation Date
- Ultimate Holding Company & Parent Company (if applicable)
- Number of Employees (estimates given where no data exists from Companies House)
- Registered Company Address & postcode
- Senior Decision Maker / Director Contact Name

Also provided as part of the "Ultimate Pack" is a comprehensive multi-use mailing and telemarketing list with comprehensive financial spreadsheet including key financial data for the industry.

2.2 Builders Merchants Competitor Listing

The following table provides a listing of the companies which are included, and for the purposes of this report, defined as 'the industry'.

Whilst we endeavour to ensure that the majority of the major companies are included, it should be noted that the list of companies included in this report is not exhaustive and the inclusion or otherwise of a company in this report does not necessarily reflect a company's relevance in the market.

Figure 1: Builders Merchants Listing

| | | |
|---------------------------------------|-------------------------------------|------------------------------------|
| A C Builders London | Collier & Catchpole | Jackson Building Centres |
| A K Timms & Sons | Compass Reclaims | James Burrell |
| A Thompson & Sons | Construction Supplies Hardware | James Wilby Builders Merchants |
| A W Lumb Northern | County Building Supplies | Jewson |
| A.E Spink | Crompton Building Supplies | JKM Industrial Supply Merchants |
| Acrelane Builders Merchants | D B S Building Supplies | John A Stephens |
| Adrian White | Darlaston Builders Merchants | John Fleming & Co |
| Ainscough Building Supplies | David Cover & Son | John George & Sons |
| Alfred Groves & Sons | Dry Lining Supplies | John Shilliday |
| Allendale Building Supplies | Dutton & Peters | John W Grant & Son |
| Allmat (East Surrey) | E B M Builders Merchants | Jones & Shuffs Heavyside |
| Alsford Timber | E H Smith Builders Merchants | JP Corry Group |
| Ashmead Building Supplies | Easter Ross Building Supplies Co | Jubilee Building Supplies |
| AW Champion | Elliott Brothers Builders Merchants | Keith Builders Merchants |
| B Mcnamee & Co. | English Bros | Kellaway Building Supplies |
| Barhaul (2003) | Ernest Bentley & Sons | Kent Blaxill Co |
| Beatsons Building Supplies | Fairalls Builders Merchants | Kent Building Plastics UK |
| Beesley & Fildes | Franklin Sussex | Kingdons |
| Blanchford & Co | G H Supplies | Kings Langley Building Supplies |
| Bolt Building Supplies | G Webb Aggregates | Kington Building Supplies |
| Boys & Boden | George Bence & Sons | Kirk Samuel (Builders Merchants) |
| Bradfords Building Supplies | George Lines (Merchants) | Lawsons (Whetstone) |
| Brick Centre | George Tufts & Son | Lee Bros |
| Brick Store | Gibbs And Dandy Plc | Leiston Building Supplies |
| Browning Jones & Morris | Go Interiors | Limavady Building Suppliers |
| Browns Builders Merchants | GPH Builders Merchants | M & J Mahoney & Sons |
| BSS Group Plc | Grant & Stone | M K M Building Supplies Driffield |
| Buildbase | Grant Haze London | M Laurier & Sons |
| Builders Supplies West Coast | H A C Catherwood | M Markovitz |
| Builders Supply (Kendal) Co. | H Butterfield | M.P Moran & Sons |
| Builders Supply Co. | H E Olby & Co | Macinnes Bros |
| Builders Supply Stores (Coventry) | Hackney Building Supplies | Manjits |
| Building Supplies (Holme Lane) | Haley Roe | Manningham Concrete |
| Bussens & Parkin | Hall & Rogers | Marshmoor Bricks |
| Busy Bee Builders Merchants | Halls Group | Masonry Solutions UK |
| C & S Builders Merchants | Heating Plumbing Supplies | Meakin Building Supplies |
| C & W Berry | Hendricks Lovell | Mechanical & Electrical Fixings |
| C J Ingle Developments | Henlow Building Supplies | Merritt & Fryers |
| C. Brewer & Sons | Henry Alty | Mkm Building Supplies |
| Caerfagu Products | Hevey Building Supplies | Multi-Quip |
| Canvey Supply Co. | Highland Steel & Building Supplies | Murdock Builders Merchants |
| Cartmore Building Supply Co | Homefit | Murdock Building Supplies |
| Cawarden Brick & Tile Co | Howarth Timber & Building Supplies | Nailfast |
| Chandlers Building Supplies | Hughes Forrest | Nailsea Builders Merchants |
| Chapel Diy Centre | Huthwaite Roofing Supplies | Naylor Drainage |
| Chas Lowe And Sons Builders Merchants | Huws Gray | Newry Building Supplies |
| Chesworth Building Supplies | Irwin & White Construction Co | Nicholls & Clarke |
| Christies | J & P Building Systems | North Staffs Builders Merchants |
| Churchley Bros | J Medler | Northern Timber Merchants |
| Civil Solutions | J T Dove | Nu-Line |
| | | One Stop Building Materials Direct |

Orpington Timber & Building Supplies
Oswald Record Plant Sales
Oxford Builders Merchants
Owen Tatton
P & R Building Supplies
P A Seccombe & Son
P G R Timber
P Mcdermott & Sons Omagh
Parker Building Supplies
Parr Rochdale
Pegasus Group (Uk)
Phoenix Merchants
Plastic Building Supplies
Plastic Pipe Supplies
Plumbase
Putney Builders Merchants
R & J Builders Hardware
R & J Ince
R F Amies Kidderminster
R S Beaver
Ranton Building Supplies
Rawle Gammon & Baker Holdings
Ray Grahams
Richard Williams Deganwy
Richmond Building Products
Ridgeon Group

Robert Dickie & Sons
Robert Price Builders Merchants
Roger W Jones
Ron Sammons
Roofing Supplies & Materials
Rose Of Jericho
Rubery Building Supplies
Salisbury & Wood
Screwfix Direct
SDG Building Accessories
SEAC
Seccombe Builders Merchants
Sehmi Builders Merchants
Shropshire Building Supplies
Sidalls Bicester
Smith & Frater
South Acton Timber Supplies
Southern Brick & Tile Co.
Spiller & Webber
Spring Lane Builders Merchants
Springvale E P S
Stanley John
Sydenhams
T Crossling & Co
Taggart & Co
Tamar Trading Co
Tencate Geosynthetics (UK)

Thomas Stone & Building Products
Tiger Timber
Tipadel
Tiptree Building Supplies
Total Timber & Building Supplies
Totem Timber
Towcester Building Supplies
Towy Works
Travis Perkins Plc
Tudors Building Supplies Hereford
Ultra Building Products
Viking Hardware
W & H S Emery Co
W J Odds
W J Roberts
Wacher & Co
Walkers The Builders Merchants
Walter Tipper
Wildmoor Aggregates
William Way Godstone
William Williams
Willis Builders Merchants
Wollens
Wolseley UK
Woods Building Supplies
WTB Holdings (Burdens)

Source: MTW Research

2.3 Builders Merchants Industry Performance 2004-2012

The following section illustrates the overall, combined performance of the leading Builders Merchants in terms of revenue, profit, assets, liabilities and net worth.

2.3.1 Builders Merchants Sales 2004-2012

The following table illustrates the performance of the selected Builders Merchants in terms of combined revenues between 2004 and 2007 and forecasts to 2012:-

Figure 2: Builders Merchants Total Sales Revenue 2004-2012

Chart Censored from Sample

Source: MTW Research / Company Financials

It should be noted that the above chart illustrates our estimates of the sales performance of the selected suppliers identified earlier, and includes all exports and other activities.

In 2007, the combined sales of the suppliers identified reached just over £xx billion, reflecting growth of around x% over the previous year. Since xxxx, sales have grown by almost xxx%. Forecasts are for this

The annual change in sales revenue by these selected suppliers is illustrated in the following chart:-

Figure 3: Builders Merchants Total Sales % Change 2004-2012

Chart Censored from Sample

Source: MTW Research / Company Financials

Sales growth for the selected suppliers is likely to have peaked in.

2.3.2 Builders Merchants Profit 2004-2012

The following table illustrates the estimated performance of the selected Builders Merchants in terms of combined profit between 2004 and 2007 and forecasts to 2012:-

Figure 4: Builders Merchants Industry Total Profit 2004-2012

Chart Censored from Sample

Source: MTW Research / Company Financials

In 2007, the combined estimated profit of the suppliers identified reached in excess of xxx million, with the chart illustrating the high level of variability in terms of profitability in recent years.

As illustrated, the lower levels of performance experienced in xxx and xxx were followed by stronger profitability in xxx and xxx, suggesting somewhat of a xxx xxxx to the market in recent years in terms of profitability levels. In addition, the chart also highlights the

Forecasts are for the

Figure 5: Builders Merchants Industry Total Profit % Change 2004-2012

Chart Censored from Sample

Source: MTW Research / Company Financials

The above chart highlights that the xxxx witnessed in xxx and xxx is unlikely to be replicated in the medium to longer term, with profit levels forecast to xxxx by xxx% between 2010-2012, following a slight xxxx in the short term. This xxxx performance is primarily likely to be due to xxxx fuelled by a xxxxx. In addition,

3. Builders Merchants Supplier Rankings

3.1 Introduction to the Rankings

The following section ranks the companies identified in the previous chapter by various key financial indicators. It should be noted that whilst we have endeavoured to limit the listing of companies to those which primarily operate in the Builders Merchants industry, each company will have varying degrees of activity within this sector.

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. In addition, for companies which are owned by foreign parent organisations, balance sheets may not always reflect a business's actual level of activity in a market. Given these complexities, the following should be treated with a degree of caution.

3.2 Sales Estimates & Turnover Ranking 2007 (censored)

3.2.1 Builders Merchants Ranking by Turnover - 2007

The following table illustrates our estimates of the rank by turnover for each of the selected Builders Merchants in 2007:-

Table 23: Ranking by Turnover 2007 - Builders Merchants

| | | |
|--|--------------------------------|------------------------------------|
| 1. Xxxvxx Xxxxxxx Xxx | 24. Xxxxx Xuxxxxx | 49. Xx Xxxxxxxx |
| 2. Wxxxxxy Ux | 25. Xxwxxxx (Wxxxxxxx) | 50. Xxxxxxxx Xuxxxxxx Xuxxxxxx |
| 3. Xxwxxx | 26. Xxwxx Xxxxxx & Xxxxx | 51. X W Xuxx Xxxxxxx |
| 4. XXX Xxxux Xxx | 27. Xxxxx Xxxxx | 52. X Xxxxx |
| 5. Xuxxxxxx | 28. Xxxxxx Xxxxx | 53. Uxxxx Xuxxxxxx Xxxuxxx |
| 6. Xxxwxxx Xxxxx | 29. Xxx Xxxxxx & Xx | 54. Xyx & Xxxx |
| 7. WXX Xxxxxxx | 30. Xxxxxy & Xxxxx | 55. Xxwxx Xuxxxxxx Xxxxxxxx |
| 8. Xuxxxxx | 31. X & W Xxxx | 56. Xuxxxxx Xxxx & Xxx Xx. |
| 9. Xxxxx Xuxxxxxx Xxxxx | 32. X X Xvx | 57. Xxxxx & Xyxxx |
| 10. Xxxxxxx Xxux | 33. Wxxxx Xxxxx | 58. Xuxxxx Xuxxxxxx Xuxxxx |
| 11. X. Xxwxx & Xxx | 34. Xxxxx Xuxxxxxx Xuxxxx | 59. Xxwxxxx Xxxx & Xxxxx |
| 12. X X Xxxx Xuxxxxxx Xxxxxxx | 35. Xxxxxxx Xvxxx | 60. X Xuxxxxxxx |
| 13. XXX Xuxxxxxx Xuxxxxxx | 36. Xxx X Xxxxxxx | 61. Xu-Xxx |
| 14. Xxxxxxx Xuxxxxxx Xuxxxxxx | 37. Xuxxxx Xuxxxxxx Xxxxxxxx | 62. Xxxxxxx Xuxxxxxx Xuxxxxxx |
| 15. Xxwxxxx Xxxxx & Xuxxxxxx Xuxxxxxx | 38. Xxwxy Xuxxxxxx Xuxxxxxx | 63. Xuxxxxxx Xuxxxxxx Wxxx Xxxx |
| 16. X Xxxxxxxx & Xx | 39. X.X Xxxx & Xxx | 64. Xxxxx Xuxxx & Xxx |
| 17. Xxxx Xxx Xxxx Xxx | 40. Xyxxx Xxxxxxx | 65. Xxx & Xxxxx |
| 18. Xxxxxxx & Xxxxx | 41. Xxxxx Xuxxxxxx Xuxxxxxx | 66. Xxxx Xxux |
| 19. Xvxx Xvxx & Xxx | 42. Wxxxx Xuxxxxxx Xxxxxxxx | 67. Xxxxx Xuxxxxxx Xuxxxxxx |
| 20. XX Xxxx Xxux | 43. Xw Xxxxxxx | 68. Xxxxx Xuxxxxxx Xxxxxxxx |
| 21. Xyxxxxxx | 44. Xxxx & Xxxx | 69. X Xxxxxxx & Xxx Xxxx |
| 22. Xxxxxx Xxxxxxx | 45. Xxxxxwxy Xuxxxxxx Xuxxxxxx | 70. Xxxx & Xxxxx |
| 23. Xuwx Xxy | 46. Xxxxxvxxx X X X | 71. X Xxxxvxxz |
| | 47. Xxx Xxxxxxx Xx | 72. X.X Xxxx |
| | 48. X Xxxxxxx & Xxxx | |

73. Xxxxxxx & Xxxxxxxx
74. X & X Uxxxxxx Xxxxxxxx
75. Xxxx W Xxxx
76. Xxxx Uxxxxxx Uxxxxxx
77. X & X Uxxxxxx Xxxxxxxx
78. Xxxxxxxx Uxxxxxx
Xxxxxxx
79. Xxxx Xxy
80. Xxxxxxxx & X
81. X & X Xxxxxx & X
82. Xxxxx Wxxxxxx Xxxxxx
83. Wxxxx
84. Wxxx Uxxxxxx Uxxxxxx
85. X X X Xxxx
86. Xxxxx Xxxx & X
87. Xxxx Uxxx X.
88. X X X Uxxxxxx Xxxxxxxx
89. Xxxx Xxxxxx Uxxxxxx
Uxxxxxx
90. Xxxxxy Uxxxxxx Uxxxxxxx
91. Xxxxxxxx & Xxxxxxxx
Xxxxx
92. XXX Uxxxxxx Xxxxxxxx
93. Xx Xxx
94. Xxxxxxx Xxxxxxxx
95. X Xxxxx & X.
96. Xxxxxxx Uxxxxxx Uxxx X
97. Xxxxxxx Uxxxxxx Xxxxxxxx
98. Xxxx Xxxx (Xxxxxxx)
99. Xxy Xx
100. Xxy Uxxxxxx Uxxxxxx
101. Xxxxxxx Xxxx & Uxxxxxx
Uxxxxxx
102. Xxxxxxx Uxxxxxx Uxxxxxx
103. Xxxxxxxx Xxxxxxx
104. Xxxxx Uxxxxxx Uxxxxxx
105. W X Xxxx
106. Xxxxxxx Xxx
107. Uxxxxxx Uxxx (Xxxxx) X.
108. Xxxxxxx Uxxxx
109. Uxxxx Xxxxx
110. Xxxx Uxxxxxx Xxxxxxxx
111. Xxxx Xxxxx Uxxxxxx
Xxxxxxx
112. Xxxxxxx Uxxxxxx
Uxxxxxx
113. Xxxx Wxxx
114. Xxx Xxxxx & Xxx
115. Xxx W Xxxx & Xx
116. Xxxxx Uxxxxxx Uxxxxxx
117. Uxxxx Uxxxxxx Uxxxxxx
118. Xxxxxxx Uxxxxxx Uxxxxxx
119. Xxxx Xxxx
120. Uxxxxxx Uxxx X.
121. Uxxxxxx Uxxx Xxxx
122. Xxx Xwx Xx Xxx Uxxxxxx
Xxxxxxx
123. Xxxxxxx Xxxx Xxxxxxx
124. Xxxx Uxxxxxx Xxxxxxxx
125. X X X Uxxxxxx Uxxxxxx
126. X & X Uxxxxxx Uxxxxxx
127. Xxxxxxx Uxxxxxx Uxxxxxx
128. Xxxxxxx Uxxxxxx Xxxxxxx
129. Xxx
130. Xxxx Xxxxx X
131. W & X X Xxy X
132. X X Xxxx & Xxx
133. Xxxxx Wxxx
134. Xxxxxxx
135. Xxxx Uxxxxxx Uxxxxxx
136. Uxxxx & Xxxxx
137. Xxxxx Xxxxx & Xxx
138. X & X Uxxxxxx Xxxxx
139. Xxx Xxxxx
140. XXX Uxxxxxx Xxxxxxxx
141. Xxxxxxxx Uxxxxxx
Uxxxxxx
142. Xxxxxxx Uxxxxxx Uxxxxxx
143. Xxxxxxx Xxxx & Xx X
144. Xxxxx Xxxx & Xxx
145. X X X Xxxxxxxx
146. Xwx & Wxxx Xxxxxxxx
X
147. Xxxxx
148. Xx Xxx Uxxxxxx Xxxxxxxx
Xxxxx
149. Xxxxxxxx Xxxx & Uxxxxxx
Uxxxxxx
150. Wxx Xxxxx
151. X X Xxxxx & Xx
152. X X Xxxx Xxxxxxxx
153. Vxxxx Xxxxx
154. Uxxxx & Xxxx
155. Xxxxx Xxx Uxxxxxx
Uxxxxxx X
156. X X Uxxxxxx
157. Xxxxx
158. Xxxx & Xxxxx Xxyxxx
159. Xxx Xxxx (Uxxxxxx
Xxxxxxx)
160. Xxxxx Xxx Uxxxxxx
161. Xy Xxxxx
162. Xxxxx Xxxx & Xxx
163. Xxxx Xxxx
164. Xxxx Xxxx & Uxxxxxx
Uxxxxxx
165. Xxxx Xxxxx
166. Wxxxxxx Xx Uxxxxxx
Xxxxxxx
167. Xxxxx
168. Xxy Xx Uxxxxxx Xxxxxxx
169. X Wxxx Xxxxxxxx
170. Xxxxxxx Uxxxxxx &
Xxxxxxx
171. Xxxxx & Wxxx
172. Xxy Wxxx
173. Xxxxx Xxx Uxxxxxx
Xxxxxxx
174. Xxxxxxx Xxxxx
175. X X Xxy & X
176. Xwx Xxxx Xxxx Xxxx
177. Xxxxx (Xxx Uxxx)
178. Xxxxxxx Uxxxxxx Xxxxxxx
179. Uxxxxxx Uxxxxxx (Xxxx
Xxx)
180. Xxxxxxx Uxxxxxx
Uxxxxxx
181. Xxxx Xxxxxxx
182. Xxxxx Xxx
183. Uxxxxxx Xxxxxxx Uxxxxxx
184. Xxx Xxxxxxx
185. Uxxxxxx Uxxxxxx Uxxxxxx
186. Xxxxxxx
187. X Uxxxx & Xxx
188. Xxxxxxx Xxxx
189. Xxxxxxx
190. Uxxx Uxxxxxx Xxxxxxx
191. Xxxxxxy & Wxx
192. Xxxx Xxxx Xxxx Uxxxxxx
193. Xxxxx Xxx
194. Xxxx Xxxx & Uxxxxxx
Xxxxxxx
195. Xxxxxxx Uxxxxxx Uxxxxxx
196. Xxx Uxxxxxx Xxxxxxx U
197. Xxxxxxx Uxxxxxx Uxxxxxx
198. X X Xxxx Xxxxxxxx
199. Xy Xxxx Uxxxxxx
200. Xxxxx Xxxxx
201. Uxxxxxy Xxx
202. Xxxxxxx Uxxxxxx Uxxxxxx
203. Xxxx Xz Xxxx
204. Xxxx Uxxxxxx Uxxxxxx
205. Xx Xxxxxxx Uxxx
Xxxxxxx
206. Xxxxx Xxxxxxx U
207. Xxxxxxx Xxxx (Ux)
208. X X Xxxx
209. Xx Xxxxx
210. Xxxxx
211. Wxxxx & X
212. Xxxxxxxx Uxxxxxx
Xxxx
213. Wxxxx Wxy Xxxxxxx
214. Wxxxx Wxxxxxx
215. Xxxxx Uxxxxxx Uxxxxxx
216. Uxxx Uxxxxxx Uxxxxxx
217. Xxxx Xxxx
218. Xxxxx Xy Xxxx
219. X X X Uxxxxxx Uxxxxxx
220. Xxxxx Uxxxxxx Xxxxxxx
221. X & X Xxx
222. Xxxxxxx Uxxxxxx
Xxxxxxx
223. Xxxxx & X
224. Wxxxxxx Xxxxxxxx
225. Xxx X Xxxx
226. Xxxxx Xxyxxxxxxx (Ux)
227. Uxxx-Uxx
228. X X Uxxxxxx Xxxx
229. Xxxxx Xxxxx
230. W X Xxxxx

Source: MTW Research Sales Estimates

3.2.2 Individual Turnover Estimates – 2007 (Censored)

The following table illustrates the estimated turnover for each company for 2007:-

Table 24: Turnover Estimates £M 2007 - Builders Merchants

| Trading Name | T/O £M | *****n* N*m* | T/O £M |
|-------------------------------------|--------|---------------------------------|--------|
| ***v** ***k*n* Pl* | £3,000 | ***n*I*** *u*I**n* *uppl*** | £17 |
| *ol**I*y Uk | £2,500 | * W Lum* No*****n | £16 |
| **w*on | £2,000 | * M**I** | £15 |
| *** **o*p Pl* | £1,100 | Ul*** *u*I**n* P*o*u*** | £14.5 |
| *u*I***** | £500 | *oy* & *o**n | £14. |
| ****w**x ***** | £420 | **own* *u*I**** M*****n** | £14 |
| W** *ol**n** | £350 | *ou*****n ****k & **I* *o. | £14 |
| Pl*m**** | £300 | M***** & **y*** | £13. |
| ***k*on *u*I**n* **n**** | £200 | Mu**o*k *u*I**n* *uppl*** | £13.5 |
| ****on **oup | £132 | **own*n* *on** & Mo**** | £13. |
| *. ***w** & *on* | £120 | * *u*****I* | £13. |
| * * *m*** *u*I**** M*****n** | £120 | Nu-L*n* | £13 |
| M** *u*I**n* upl*** | £100 | ****on* *u*I**n* *uppl*** | £12 |
| *****o*** *u*I**n* *uppl*** | £90 | *u*I**** *uppl*** W*** *o*** | £12 |
| *ow**** *m*** & *u*I**n* *uppl*** | £80 | **o*** *u*** & *on | £12 |
| * **o**I*n* & *o | £75 | **Il & *o**** | £12 |
| **** *n* **n*y Pl* | £65 | **Il* **oup | £12 |
| N***oll* & *I**k* | £65 | L****on *u*I**n* *uppl*** | £12 |
| **v** *ov** & *on | £55 | O**o** *u*I**** M*****n** | £12 |
| *P *o**y **oup | £55 | P M****mo** & *on* Om*** | £12 |
| *y**n**m* | £55 | *m*** & ***** | £12 |
| *Il*o** **o***** *u*I**** M*****n** | £46 | M M**kov*z | £11.5 |
| *uw* ***y | £45 | *. *p*nk | £11 |
| **m** *u***Il | £38 | *oll** & ****pol* | £11 |
| L*w*on* (W*****on*) | £37 | * & * *u*I**** ****w*** | £11 |
| **wl* **mmon & **k** *ol**n** | £37 | *o** W *on** | £11 |
| *o**** P**** *u*I**** M*****n** | £33 | *ol* *u*I**n* *uppl*** | £10 |
| *I**o** **m*** | £30 | * & * *u*I**** M*****n** | £10 |
| *o*n *I*m*n* & *o | £28 | ***I**on *u*I**** M*****n** | £10 |
| ****I*y & **I** | £27 | **n*y *I*y | £10 |
| * & W ***y | £27 | *I*n***o** & *o | £9.5 |
| * * *ov* | £27 | M & * M**on*y & *on* | £9.5 |
| W*I*** **pp** | £27 | ***** W*I**m* ****nwy | £9.5 |
| *****n* Plum**n* *uppl*** | £26 | Woll*n* | £9.5 |
| **n****k* Lov*Il | £26 | Woo** *u*I**n* *uppl*** | £9.5 |
| *o*n * ***p**n* | £24 | P * * **m*** | £9 |
| Mu**o*k *u*I**** M*****n** | £23 | *I**** **ov** & *on* | £8 |
| N*w*y *u*I**n* *uppl*** | £23. | **nv*y *upply *o. | £8 |
| M.P Mo**n & *on* | £22.5 | * * M *u*I**** M*****n** | £8 |
| N*ylo* ***** | £22 | K*n** L*n*I*y *u*I**n* *uppl*** | £8 |
| P**k** *u*I**n* *uppl*** | £22 | L*m*v*y *u*I**n* *uppl**** | £8 |
| W*Il** *u*I**** M*****n** | £22 | M*****n**I & *I*****I **x*n** | £8 |
| *w ***mp*on | £21 | *P* *u*I**** M*****n** | £7.5 |
| ***n* & **on* | £20 | L** **o* | £7.5 |
| K*Il*w*y *u*I**n* *uppl*** | £20 | P*o*n*x M*****n** | £7.5 |
| *p**n*v*I* * P * | £20 | * M*n*m** & *o. | £7 |
| K*n* *I*x*Il *o | £19 | ****mo** *u*I**n* *upply *o | £7 |
| * **omp*on & *on* | £18 | *****Il* *u*I**** M*****n** | £7 |
| *o *n****o** | £18 | *o*** L*n** (M*****n**) | £7 |

| ****n* N*m* | T/O £M |
|---------------------------------------|--------|
| **l*y *o* | £7 |
| **v*y *u*l**n* *uppl*** | £7 |
| ****l*n* ****l & *u*l**n* *uppl*** | £7 |
| K*n**on *u*l**n* *uppl*** | £7 |
| M*nn*n***m *on***** | £7 |
| **n*on *u*l**n* *uppl*** | £7 |
| W * O*** | £7 |
| M***nn** **o* | £6.5 |
| *u*l**** *upply (K*n**l) *o. | £6 |
| ***nkl*n *u***x | £6 |
| *u**** *o***** | £6 |
| K**** *u*l**** M*****n** | £6 |
| No*** ***** *u*l**** M*****n** | £6 |
| *ow***** *u*l**n* *uppl*** | £6 |
| **m** W*l*y *u*l**** M*****n** | £5.5 |
| *o*n **o*** & *on* | £5.5 |
| *o*n W ***n* & *on | £5.5 |
| M**k*n *u*l**n* *uppl*** | £5.5 |
| *u*o** *u*l**n* *uppl*** *****o** | £5.5 |
| **n**ou** *u*l**n* *uppl*** | £5 |
| ****k **o** | £5 |
| *u*l**** *upply *o. | £5 |
| *u*l**** *upply **o*** (*ov*n**y) | £5 |
| **** Low* *n* *on* *u*l**** M*****n** | £5 |
| No*****n **n** M*****n** | £5 |
| ***m* *u*l**** M*****n** | £5 |
| M K M *u*l**n* *uppl*** *****l* | £5 |
| P & * *u*l**n* *uppl*** | £4.5 |
| Pl**** *u*l**n* *uppl*** | £5 |
| ****mon* *u*l**n* P*o*u*** | £5 |
| **** | £4.5 |
| **m** *****n* *o | £4.5 |
| W & * *m**y *o | £5 |
| * K **mm* & *on* | £4 |
| *****n W**** | £4 |
| ***** | £4 |
| *oun*y *u*l**n* *uppl*** | £4 |
| *u**on & P**** | £4 |
| **n*** **n*l*y & *on* | £4 |
| * & P *u*l**n* *y***m* | £4 |
| P*** *o*****l* | £4 |
| *** *u*l**n* *****o**** | £4 |
| ***op***** *u*l**n* *uppl*** | £4 |
| **p**** *u*l**n* *uppl*** | £4 |
| **w****n ****k & **l* *o | £3.5 |
| **o*** **n** & *on* | £3.5 |
| * * * *****wo* | £3.5 |
| **w*n & W**** *on***u***on *o | £3.5 |
| M*n**** | £3.5 |
| On* **op *u*l**n* M*****l* ***** | £3.5 |
| O*p*n**on **m*** & *u*l**n* *uppl*** | £3.5 |
| Ow*n ****on | £3.5 |
| P * ****om** & *on | £3.5 |
| ****n* N*m* | T/O £M |

| * * m*** K****m*n**** | £3.5 |
|----------------------------------|--------|
| V*k*n* ****w*** | £3.5 |
| *u***n* & P**k*n | £3 |
| ***** *o** *u*l**n* *uppl*** *o | £3 |
| * * *uppl*** | £3 |
| *om**** | £3 |
| *on** & **u*** **vy**** | £3 |
| K**k **mu*(*u*l**** M*****n**) | £3 |
| Pl**** P*p* *uppl*** | £3 |
| **y *****m* | £3 |
| *o**** **k** & *on* | £3 |
| ***** **m*** | £3 |
| *o**l **m*** & *u*l**n* *uppl*** | £3 |
| *o**m **m*** | £3 |
| W*lk*** ** *u*l**** M*****n** | £3 |
| *****ul (2003) | £2.5 |
| *u*y *** *u*l**** M*****n** | £2.5 |
| * W*** ***** | £2.5 |
| *oo**n* *uppl*** & M*****l* | £2.5 |
| *p**l** & W**** | £2.5 |
| *owy Wo*k* | £2.5 |
| *p**n* L*n* *u*l**** M*****n** | £2.4 |
| *****u P*o*u*** | £2.3 |
| * * Ol*y & *o | £2.3 |
| O*w*l* ***o** Pl*n* **l** | £2.3 |
| *llm** (**** *u***y) | £2.2 |
| ****l*n* *u*l**** M*****n** | £2 |
| *u*l**n* *uppl*** (*olm* L*n*) | £2 |
| ***wo*** *u*l**n* *uppl*** | £2 |
| **v*l *olu**on* | £2 |
| n*l*** **o* | £2 |
| *u**w**** *oo**n* *uppl*** | £2 |
| *o*n ***ll***y | £2 |
| *u**l** *u*l**n* *uppl*** | £2 |
| K*n**on* | £2 |
| M L*u**** & *on* | £2 |
| M*****moo* ****k* | £2 |
| N**l**** | £2 |
| Pu*n*y *u*l**** M*****n** | £2 |
| **l***u*y & Woo* | £2 |
| *ou** ***on **m*** *uppl*** | £2 |
| ***nly *o*n | £2 |
| **om** **on* & *u*l**n* P*o*u*** | £2 |
| ***m*** *u*l**n* *uppl*** | £1.8 |
| K*n* *u*l**n* Pl***** UK | £1.8 |
| *ll*n**l* *u*l**n* *uppl*** | £1.7 |
| * * *n*l* **v*lopm*n** | £1.7 |
| **y L*n*n* *uppl*** | £1.7 |
| ***ll* ***** | £1.6 |
| **u***l*y **o* | £1.5 |
| **omp*on *u*l**n* *uppl*** | £1.5 |
| ***n* **z* Lon*on | £1.5 |
| **nlow *u*l**n* *uppl*** | £1.5 |
| *KM *n*u*****l *upply M*****n** | £1.5 |
| ****n* N*m* | T/O £M |

| | |
|--------------------------------|--------|
| M**on*y *olu**on* Uk | £1.5 |
| P****u* **oup (Uk) | £1.5 |
| * * **v** | £1.5 |
| *on **mmon* | £1.5 |
| **p***l | £1.5 |
| W**** & *o | £1.5 |
| *on***u***on *uppl*** ****w*** | £1.4 |
| W*ll**m W*y *o***on* | £1.3 |
| W*ll**m W*ll**m* | £1.3 |
| ***kn*y *u*l**n* *uppl*** | £1.2 |
| *u***y *u*l**n* *uppl*** | £1.2 |
| ****k **n*** | £1 |
| ****n* N*m* | T/O £M |

| | |
|----------------------------|-------|
| ***p*l **Y **n*** | £1 |
| * * * *u*l**n* *uppl*** | £1 |
| N**l*** *u*l*** M*****n** | £1 |
| * & * *n** | £1 |
| ****om** *u*l*** M*****n** | £1 |
| ***** & *o | £1 |
| W*l*mo*o* ***** | £1 |
| *o** O* *****o | £0.5 |
| **n**** *o*yn***** (Uk) | £0.5 |
| Mul**-Qu*p | £0.3 |
| * * *u*l*** Lon*on | £0.05 |
| *omp*** **l**m* | £0.03 |
| W * *o***** | £0.03 |

Source: MTW Research / Company Financials

It should be noted that the above turnover estimates are based on a combination of reported accounts and our own estimates based on other financial inputs and should therefore be regarded as indicative only.

3.3 Builders Merchants Ranking by Profit - 2007

The following table illustrates our estimates of the rank by profit for each of the selected Builders Merchants in 2007:-

Table 25: Ranking by Profit 2007 - Builders Merchants

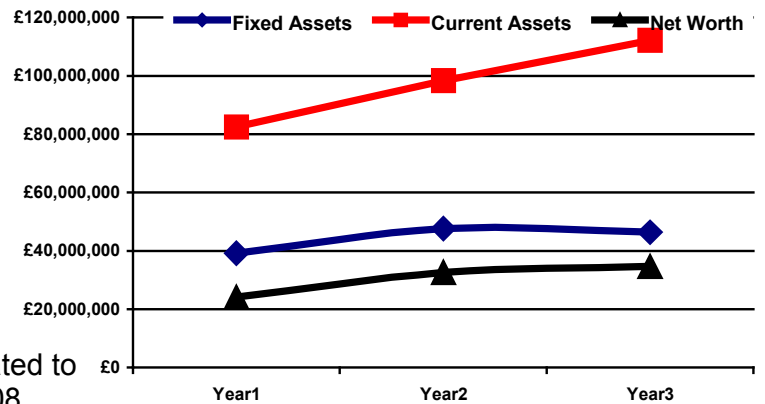
4. Builders Merchants Distributor Profiles

Sample Company Ltd

Sample Address
 Sample Address
 Sample Address
 Sample Address
 Postcode

Company Profile Overview

Sample Company is a private limited with share capital company, incorporated on Sample Date. The company's main activities are recorded by Companies House as "Sample Activity". The company is estimated to employ approximately xxx employees in 2008.



To year end, 30/06/2007, Sample Company is indicated to have achieved a turnover of around £350 million. Pre-tax profit for the same period is estimated at around £5 million.

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

Overview of Sample Company Key Financials

| | |
|---|----------------------|
| Company Name | Sample Company |
| Brief Description of Activities | Sample |
| Parent Company | n/a |
| Ultimate Holding Company | n/a |
| Estimated Number of Employees | Sample |
| Senior Decision Maker / Director | Sample Director Name |

Key Financial Indicators Analysis - Sample Company

Key Financial Indicators, Year Ending 31/12/2005 to 30/06/2007

| Key Indicator | Year Ending 31/12/2005 | Year Ending 31/06/2006 | Year Ending 30/06/2007 |
|------------------------------|------------------------|------------------------|------------------------|
| Debtors | £51,532,000 | £65,569,000 | £74,750,000 |
| Fixed Assets | £39,082,000 | £47,560,000 | £46,408,000 |
| Current Assets | £82,516,000 | £98,289,000 | £112,091,000 |
| Current Liabilities | £85,545,000 | £102,507,000 | £114,599,000 |
| Long Term Liabilities | £11,847,000 | £10,763,000 | £9,339,000 |
| Net Worth | £24,206,000 | £32,579,000 | £34,561,000 |