

Kitchen & Bathroom Distributors Market Rank & Profile UK 2008

Kitchen & Bathroom Distributors Industry 2004-2012, Supplier Ranking & Profiles, Industry Averages for Sales, Profitability & Key Financials 2004-2012.

April 2008

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	PWS Distributors Limited	36
	Mark Two Distributors Limited	37
	Ultra Finishing Limited	38
	Roper Rhodes Limited	39
	Arrow Distributors Limited	40
	Walter Tipper Limited	41
	Be Modern Limited	42
	Robert Lee Distribution Limited	43
	Maurice Lay Distributors Limited	44
	Davroc Limited	45
	Mereway Limited	46
	Qualitex Supplies Limited	47
	Brausch & Co UK Limited	49
	Claygate Distribution Limited	50
	Avilion Limited	51
	C P Hart & Sons Limited	52
	N Froy & Sons Limited	53
	Contract Appliances Limited	54
	RKB Limited	55
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	A W Andes Bathrooms Limited	57
	Barwick of Bradford Limited	58
	Farmiloe & Farmiloe (WBS) Limited	59
	Portway Domestic Appliances Limited	60
	Mike Walker Distribution Limited	61
	C R S Wholesale Cambridge Limited	62
	Lecico PLC	63

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R K Ceramics Limited	69
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Goodwood Bathrooms Limited	101
Jendico Limited	102
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C.F.Anderson & Son Limited	104
Clayton Munroe Limited	105
Waltham Plumbing Supplies Limited	106
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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 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.

Researched and collated by market research professionals who have been writing market reports on these sectors since 1999, MTW's *Rank and Profile* reports represent an excellent tool on which to base further competitor and market analysis or can simply be used to gain a greater understanding of the performance of your competitors in recent years and how this compares with your company's performance.

This report enables the reader to undertake

- **Fast and Effective 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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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.

- **Identify and Assess Possible Acquisition Targets**

The ranking section of this report, coupled with and 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. Kitchen & Bathroom Distributors Industry

2.1 Introduction to this Rank & Profile Report

In order to provide an easy to use tool for the basis of a 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 Supplier 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 Number of Employees

Supplier 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

Supplier Profile

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

- 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

2.2 Kitchen & Bathroom Distributors 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 indicate a company's relevance to a particular market.

Figure 1: Kitchen & Bathroom Distributors

A C Toon	Davroc	Peachurst
A W Andes Bathrooms	DBD Distribution	PJH Group
AHED (F& P Wholesale)	Delphi Distribution	Portway Domestic Appliances
American Appliance Centre	DHL Bathroom Supplies	Potter Cowan & Company Belfast
Arrow Distributors	Ergomite	Power Shower Distributors
Ashley Distribution	Express Radiators And Bathrooms	PWS Distributors
Avilion	Farmiloe & Farmiloe (WBS)	Qualitex Supplies
Barwick of Bradford	G K R Distribution	Quest 4
Bathrooms International	G R Hullock (1994)	R K Ceramics
Be Modern	Gas Appliance Distributors	RKB
Beaufort Bathroom Distributors	Goodwood Bathrooms	Robert Lee Distribution
Blackheath Products	H M James & Sons	Roper Rhodes
Bodel Distributors	Harold Moore & Son	S D A Distributors
Bradshaw Appliances	Hatt Kitchens	Scorpion Bathroom Distribution
Brausch & Co UK	Heritage Bathrooms	Shore Distribution
Brent Plastics	Homestyle Direct	System Wessex
Brian Donaldson Distribution	Interfab	Teuco UK
Bridisco	Ipswich Plastics	The Kitchen & Bathroom Warehouse
Bristol Tile Company	J P Distribution	Top Service
C P Hart & Sons	Jendico	Ultra Finishing
C R S Wholesale Cambridge	Lecico PLC	Venezia Designs
C.F.Anderson & Son	Maison D Art International	Walter Tipper
Capricorn Kitchen Studio	Mark Two Distributors	Waltham Plumbing Supplies
CD UK	Maurice Lay Distributors	Waterline
Chowart	Mekon Products	Watermill Products
Claygate Distribution	Mereway	West Point Distributors
Clayton Munroe	Mike Walker Distribution	Whirlpool Express UK
Contract Appliances	N Froy & Sons	Woodfit
Cranham Group PLC	Nordic Saunas & Leisure	
Danico Brass	Northern Sink Supplies	

Source: MTW Research

2.3 Kitchen & Bathroom Distributors Industry Performance 2004-2012

The following section illustrates the overall, combined performance of the leading Kitchen & Bathroom Distributors in terms of revenue, profit, assets, liabilities and net worth.

2.3.1 Kitchen & Bathroom Distributors Sales 2004-2012

The following table illustrates the performance of the selected Kitchen & Bathroom Distributors in terms of combined revenues between 2004 and 2007 and forecasts to 2012:-

Figure 2: Kitchen & Bathroom Distributors Total Sales Revenue 2004-2012

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 under £x billion, reflecting xxxx of around x% over the previous year. Since 2004, sales have ***** by almost x%. Forecasts are for this growth to ***** , to reach almost £x billion by 2012.

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

Figure 3: Kitchen & Bathroom Distributors Total Sales % Change 2004-2012

SAMPLE

Source: MTW Research / Company Financials

Sales ***** for the selected suppliers is likely to have ***** in 2007 at around ***** %, from ***** ***** in 2005 and 2006. However, *****

2.3.2 Kitchen & Bathroom Distributors Profit 2004-2012

The following table illustrates the estimated performance of the selected Kitchen & Bathroom Distributors in terms of combined profit between 2004 and 2007 and forecasts to 2012:-

Figure 4: Kitchen & Bathroom Distributors Industry Total Profit 2004-2012

SAMPLE

Source: MTW Research / Company Financials

In 2007, the combined estimated profit of the suppliers identified reached in excess of £***** million, reflecting ***** of more than £***** million in the 2 years since 2005. Since 2004, overall profit levels have ***** by more than ***** %. Forecasts are for a more ***** scenario, primarily due to *****

The percentage change in profit by these selected suppliers is illustrated in the following chart:-

Figure 5: Kitchen & Bathroom Distributors Industry Total Profit % Change 2004-2012

SAMPLE

Source: MTW Research / Company Financials

The above chart highlights somewhat of a 'correction' in profitability levels in ***** , following a relatively substantial ***** in ***** , some of which may have been due to *****

2.4 Average Kitchen & Bathroom Distributors' Sales Performance 2004-2012

The following section illustrates the average performance of the selected Kitchen & Bathroom Distributors in terms of revenue, profit, assets, liabilities and net worth.

2.4.1 Kitchen & Bathroom Distributors Average Sales Revenue 2004-2012

The following table illustrates the average sales revenue of Kitchen & Bathroom Distributors between 2004 and forecasts to 2012:-

Figure 12: Kitchen & Bathroom Distributors Average Sales Turnover 2004-2012

SAMPLE

Source: MTW Research / Company Financials

As illustrated, the average sales revenue is currently estimated at around £***** million, reflecting strong ***** since 2004 of just under ***** %. To 2012, forecasts are for the average sales revenue per company to *****

The percentage change in average sales turnover is illustrated in the following chart:-

Figure 13: Kitchen & Bathroom Distributors Suppliers Average Sales % Change 2004-2012

SAMPLE

Source: MTW Research / Company Financials

The ***** is clearly evident in 2007, with forecasts suggesting continued *****

2.4.2 Kitchen & Bathroom Distributors Average Profitability 2004-2012

The following table illustrates the average profit levels of Kitchen & Bathroom Distributors suppliers since 2004 and forecasts to 2012:-

3. Kitchen & Bathroom Distributors 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 Kitchen & Bathroom Distributors 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

3.2.1 Kitchen & Bathroom Distributors Ranking by Turnover - 2007

The following table illustrates our estimates of the rank by turnover for each of the selected Kitchen & Bathroom Distributors suppliers in 2007:-

Table 23: Ranking by Turnover 2007 - Kitchen & Bathroom Distributors

1.	*****	31.	***** Distribution	61.	*****
2.	*****	32.	*****	62.	***** Distributors
3.	***** ***** PLC	33.	*****	63.	*****
4.	*****)	34.	*****	64.	*****
5.	*****	35.	*****	65.	*****
6.	*****	36.	*****	66.	*****
7.	*****	37.	*****	67.	*****
8.	*****	38.	*****	68.	*****
9.	*****	39.	*****	69.	G *****
10.	*****	40.	*****	70.	*****
11.	*****	41.	*****	71.	*****
12.	*****	42.	*****	72.	Je*****
13.	*****	43.	*****	73.	*****
14.	*****	44.	*****	74.	C*****
15.	*****	45.	*****	75.	*****
16.	*****	46.	*****	76.	*****
17.	*****	47.	*****	77.	*****
18.	*****	48.	*****	78.	S *****
19.	*****	49.	*****	79.	*****
20.	C***** Distribution	50.	*****	80.	***** Warehouse
21.	*****	51.	*****	81.	In*****
22.	***** ***** & Sons	52.	*****	82.	H*****
23.	*****	53.	*****	83.	*****
24.	*****	54.	*****	84.	*****
25.	*****	55.	*****	85.	*****
26.	***** Distribution	56.	*****	86.	***** Products
27.	***** Bathrooms	57.	*****	87.	Ma*****
28.	*****	58.	*****	88.	*****
29.	*****	59.	*****		
30.	*****	60.	*****		

Source: MTW Research Sales Estimates

***** Limited

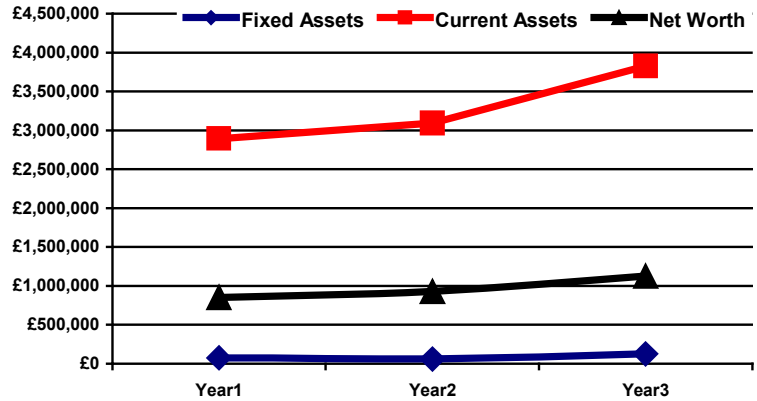
*****Road

*****Trading Estate

Yorkshire

Company Profile Overview

***** Limited is a private limited with share capital company, incorporated on *****. The company's main activities are officially described as "Wholesale of hardware, plumbing and heating equipment and supplies". The company is estimated to employ approximately ***** employees in 2008.



To year end, 31-Dec-04, ***** Limited is indicated to have achieved a turnover of around £14.0 million. Pre-tax profit for the same period is estimated at around £0.3 million.

The following table briefly provides a top line overview on ***** Limited in tabular format:-

***** Limited's Key Financials

Company Name	***** Limited
Official Description of Activities	Wholesale of hardware, plumbing and heating equipment and supplies
Parent Company	n/a
Ultimate Holding Company	n/a
Estimated Number of Employees	*****
Senior Decision Maker / Director Name	***** *****

Key Performance Indicators - ***** Limited

Key Financial Indicators, Year Ending to 31-Dec-04

Key Indicator	Year Ending 31-Mar-05	Year Ending 31-Mar-06	Year Ending 31-Mar-07
Debtors	£1,504,000	£1,837,000	£2,150,000
Fixed Assets	£79,000	£61,000	£126,000
Current Assets	£2,893,000	£3,097,000	£3,828,000
Current Liabilities	£1,399,000	£1,635,000	£2,187,000
Long Term Liabilities	£722,000	£593,000	£641,000
Net Worth	£851,000	£930,000	£1,126,000