



2013 MDM Market Leaders

Top distributors in 15 sectors



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 2013 Market Leaders

2013 Sector Lists

- Building Materials/Construction
- Electrical
- Electronics
- Fasteners
- Fluid Power
- Gases and Welding Equipment
- Hose and Accessories
- HVACR/Plumbing
- Industrial
- Industrial PVF
- Jan-San
- Pharmaceutical (list only)
- Plastics (list only)
- Power Transmission/Bearing
- Safety Products

Get revenues for the top 40
and top distributors in 14
other sectors at:
mdm.com/marketleaders

Methodology for Top Distributor Lists

These are the 2013 MDM Market Leaders. The lists are ranked in order of fiscal 2012 revenue size alone; no other factors were used to compile these lists.

These lists reflect North American revenues where they are clearly broken out by the global distributors. For example, rather than list Wolseley plc as the top industrial distributor, we listed its North American subsidiaries, Ferguson Enterprises/Wolseley Canada.

We collected data for this report in several ways. Companies were asked to fill out a form online providing data about revenues, trends and executives. In addition, forms were sent to companies known to be the largest players in their sectors. We also utilized SEC annual filings for public companies.

In the end, not every company was willing to provide us with revenue data for 2012, yet we

deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).

We utilized several resources to estimate where to place these companies on their respective lists.

These resources included: past reported revenues, average revenue increases within the sectors, data from economic reports and conversations with industry experts. All companies for which we estimated revenues and/or position are notated with "N/A."

Revenues for all companies in this report are in U.S. dollars. For companies who report their data in other currencies, we converted their revenues to U.S. dollars using the exchange rate in place on the last day of that company's reported fiscal year to determine ranking.

- The MDM Research Team

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Top 40 Industrial Distributors

1. Ferguson Enterprises/Wolseley Canada
2. W.W. Grainger
3. HD Supply
4. MRC Global Corp.
5. Airgas*
6. Motion Industries
7. The Fastenal Company
8. McMaster-Carr
9. Applied Industrial Technologies*
10. MSC Industrial Supply
11. Edgen Group
12. Sonepar
13. WinWholesale Inc.
14. Interline Brands
15. Wurth - North America
16. DXP Enterprises
17. Kaman Industrial Technologies
18. F.W. Webb
19. ERIKS (North America)
20. Bearing Distributors Inc. (BDI)
21. Industrial Distribution Group
22. Turtle & Hughes
23. Wajax Industrial Components
24. The United Distribution Group
25. SunSource
26. BlackHawk Industrial
27. Barnes Distribution North America
28. Lawson Products
29. DGI Supply
30. Gas and Supply Co.
31. RS Hughes Co.
32. Hisco
33. Hydradyne
34. SBP Holdings Inc.
35. FCX Performance
36. Womack Machine Supply Co.
37. Valin Corp
38. Kimball Midwest
39. Canadian Bearings
40. Bossard North America

*calendar year 2012

Top 10 Power Transmission/ Bearing Distributors

1. Motion Industries
2. Applied Industrial Technologies
3. Kaman Industrial Technologies
4. BDI
5. Wajax Industrial Components
6. DXP Enterprises (Power Transmission)
7. W.W. Grainger
8. Canadian Bearings Ltd.
9. OTP Industrial Solutions
10. IBT Industrial Solutions

Top 25 Electrical Distributors

1. Sonepar
2. WESCO International
3. Rexel Holdings USA/Rexel Canada
4. Graybar
5. CED
6. Anixter
7. HD Supply Power Solutions
8. Border States Electric
9. W.W. Grainger
10. Crescent Electric Supply Company
11. McNaughton-McKay Electric Company
12. Mayer Electric Supply
13. EIS
14. Elliott Electric Supply
15. Turtle & Hughes
16. North Coast Electric
17. Summit Electric Supply
18. City Electric Supply
19. Dealers Electrical Supply
20. State Electric Supply Company
21. Wholesale Electric Supply Co. of Houston
22. The Reynolds Company
23. Kirby Risk
24. Werner Electric Supply Company
25. Van Meter Inc.

Top 5 Electronics Distributors

1. Avnet
2. Arrow Electronics
3. Future Electronics
4. TTI, Inc./Mouser Electronics
5. Digi-Key Corp

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Top 10 Fluid Power Distributors

1. Applied Industrial Technologies
 2. Motion Industries
 3. SunSource
 4. W.W. Grainger
 5. Hydradyne
 6. The Fastenal Company
 7. FCX Performance
 8. Womack Machine Supply
 9. Kaman Industrial Technologies
 10. Berendsen Fluid Power
-

Top 10 HVACR/Plumbing Distributors

1. Ferguson Enterprises/Wolseley Canada
 2. Watsco
 3. Hajoca/EMCO Corp.
 4. WinWholesale
 5. Johnstone Supply
 6. F.W. Webb
 7. R.E. Michel
 8. Morrison Supply Co.
 9. W.W. Grainger
 10. Interline Brands
-

Top 5 Industrial PVF Distributors

1. MRC Global
 2. Ferguson Enterprises/Wolseley Canada
 3. NOV Wilson
 4. Edgen Group
 5. Shale-Inland Holdings
-

Largest Regional Gases/Welding Equipment Distributors

- Airgas
- Praxair
- Gas and Supply Company
- Norco, Inc
- Roberts Oxygen Company

Top Fasteners Distributors

- Anixter
 - Barnes Distribution
 - B/E Aerospace
 - Bisco Industries
 - Bossard America
 - Copper State Nut & Bolt
 - EFC International
 - Endries International (Wolseley Industrial Group Company)
 - The Fastenal Company
 - W.W. Grainger
 - Kimball Midwest
 - Lawson Products
 - McMaster-Carr
 - MSC Industrial Supply
 - The Hillman Group
 - Wesco Aircraft
 - Wurth - North America
-

Top 10 Building Material/Construction Distributors

1. ABC Supply Co.
 2. ProBuild Holdings
 3. Beacon Roofing Supply
 4. Allied Building Products
 5. BlueLinx Corp.
 6. 84 Lumber
 7. HD Supply
 8. L&W Supply
 9. Builders FirstSource
 10. Roofing Supply Group
-

Largest Regional Hose & Accessories Distributors

- Lewis-Goetz and Company
- GHX Industrial
- Singer Equities
- JGB Enterprises
- HosePower

The Largest National & Regional Safety Distributors

- Airgas Safety
- Arbill
- Conney Safety Products (WESCO)
- DXP Enterprises
- The Fastenal Company
- W.W. Grainger
- Mallory Safety & Supply
- Northern Safety & Industrial
- Orr Safety
- Safety Today
- VWR International
- Wise Safety & Environmental

Top 10 Semi-Finished Plastic Shapes Distributors

Global Plastics Letter provided the following list to MDM as a representation of the largest distributors of semi-finished plastic shapes in North America. The following are estimated revenue ranges for the top distributors:

Annual Sales of more than \$400 million
SABIC Polymershapes

Annual Sales of \$300-\$400 million
Laird Plastics

Annual Sales of \$200-\$300 million
Piedmont Plastics

Annual Sales of \$100-\$200 million
Curbell Plastics
Total Plastics Inc.
Professional Plastics
Cope Plastics
AIN Plastics

Under \$100 million in Annual Sales
Port Plastics
E&T Plastics
Regal Plastics
Acrylic

Top 5 Jan-San Distributors & the Largest Regional Distributors

1. Staples Advantage/Quill.com
2. Unisource Worldwide
3. Xpedx
4. W.W. Grainger
5. Interline Brands – AmSan

Other Jan-San Distributors:

- Dade Paper
- HP Products
- Pollock Paper
- KelSan
- Western Paper Distributors
- Dalco Enterprises
- Strauss Paper
- WAXIE Sanitary Supply
- EBP Supply Solutions
- The Fastenal Company

Largest Drug Distributors

Pembroke Consulting's Adam Fein, who writes the popular Drug Channels blog at www.drugchannels.net provided the following list as a representation of the largest pharmaceutical wholesalers.

Top 3:
McKesson Corp. (\$116.9B in drug distribution)
Cardinal Health Inc. (\$95.1B in drug dist.)
AmerisourceBergen Corp. (\$77.7B in drug dist.)

Other Large Wholesalers in This Sector:

Morris & Dickson (\$3.6 billion)
H.D. Smith (\$3.4 billion)
Smith Drug (\$2.2 billion)
Curascript Specialty Distribution (\$2.1 billion)
NC Mutual Wholesale Drug (\$1.1 billion)
Anda Distribution (\$1.0 billion)
Rochester Drug Cooperative (\$825 million)

Other regional and specialty wholesalers include: Burlington Drug, Dakota Drug, FFF Enterprises, Florida Infusion, Harvard Drug Group, King Drug, Metro Medical, Miami-Luken, Seacoast, and Value Drug.

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Access the 2013 Distribution Trends Report at www.mdm.com/marketleaders

This annual report includes:

- * Articles on critical trends in 2013
in wholesale distribution
- * Trend snapshots for 13 sectors
- * Market Leader Interviews with
Interline Brands & Arrow Electronics
- * MDM Market Mover Profiles

The 2013 Trends Report is free
to MDM Premium subscribers.

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