

## SEGMENT LEADERS

	Plumbing & Hydronics		Pipe-Valves-Fittings		HVACR
1	Ferguson and Wolseley Canada	1	McJunkin Red Man Corp.	1	Watsco
2	Hajoca Corp.*	2	Ferguson and Wolseley Canada	2	Johnstone Supply
3	WinWholesale	3	Wilson	3	Ferguson and Wolseley Canada
4	Emco Corp.*	4	Emco Corp.*	4	R.E. Michel Co.
5	Noble Supply	5	Kelly Pipe Co. LLC	5	US Air Conditioning Distributors LLC
6	Morrison Supply Co.	6	WinWholesale	6	WinWholesale
7	Interline Brands	7	Industrial Piping Specialists	7	F.W. Webb Co.
8	F.W. Webb Co.	8	F.W. Webb Co.	8	ABCO Refrigeration
9	Bartle & Gibson Co. Ltd.	9	Hajoca Corp.*	9	G.W. Berkheimer Co.
10	Thos. Somerville Co.	10	Chicago Tube & Iron	10	Emco Corp.*
11	Hirsch Pipe & Supply Co.	11	Columbia Pipe & Supply Co.	11	Koch Air LLC
12	Locke Supply	12	Macomb Group	12	Peirce-Phelps
13	Express Pipe & Supply	13	Bakersfield Pipe & Supply	13	Interline Brands
14	First Supply LLC	14	Coburn Supply Co.	14	Sid Harvey's
15	Northeastern Supply	15	Ameripe Supply*	15	Temperature Equipment
16	R.E. Michel Co.	16	Robert-James Sales	16	Auer Steel & Heating Supply Co.
17	Consolidated Pipe & Supply	17	Puget Sound Pipe and Supply Co.	17	Century A/C Supply and Air Management Supply
18	Granite Group Wholesalers LLC	18	Johnstone Supply	18	NB Handy Co.
19	Cregger Co.	19	All-Tex Pipe & Supply	19	Johnson Supply
20	Eina Supply Co.	20	United Pipe & Supply Co.	20	American Refrigeration Supplies
21	Coburn Supply Co.	21	First Supply LLC	21	Aces A/C Supply
22	Goodin Co.	22	Independent Pipe & Supply Corp.	22	Noble Supply
23	Johnstone Supply	23	Eastern Industrial Supplies	23	Locke Supply
24	Trumbull Industries	24	Central Supply Co.	24	Coburn Supply Co.
25	General Plumbing Supply	25	Consolidated Pipe & Supply	25	O'Connor Co.
26	Davis & Warshow	26	City Pipe & Supply Corp.	26	Behler-Young
27	Gonnor Co.	27	Trumbull Industries	27	Slakey Brothers
28	Famous Supply	28	Famous Supply	28	Morrison Supply Co.
29	Slakey Brothers	29	Western Water Works Supply Co.	29	Famous Supply
30	Pacific Plumbing Supply Co. LLC	30	Thos. Somerville Co.	30	Young Supply Co.
31	Plumbing Distributors	31	Granite Group Wholesalers LLC	31	S.W. Anderson Sales Corp.
32	Crawford Supply Co.	32	Goodin Co.	32	Munch's Supply Co.
33	Central Supply Co.	33	Davis & Warshow	33	Hajoca Corp.*
34	TSC Distribution Group (Torrington Supply)	34	Morrison Supply Co.	34	Hinkle Metals & Supply
35	Wool Plumbing Supply	35	Collins Pipe & Supply	35	Southern Refrigeration Corp.
36	Redlon & Johnson	36	Monumental Supply Co.	36	Lute Supply
37	Supply New England	37	Mountain States Pipe	37	Robertson Heating Supply Co.
38	Rampart Supply	38	Plumb Supply Co.	38	Acme Refrigeration of Baton Rouge LLC
39	Robertson Heating Supply Co.	39	Rampart Supply	39	Dealers Supply Co.
40	Plumb Supply Co.	40	Bergen Industrial Supply Co.	40	American Metals Supply Co.
41	Wm. F. Meyer Co.	41	Columbia Specialty Co.	41	Colonial Commercial Corp.
42	Security Supply Corp.	42	Metropolitan Pipe and Supply Co.	42	Goodin Co.
43	Columbia Pipe & Supply Co.	43	Industrial Piping Systems	43	Connor Co.
44	George T. Sanders Co.	44	Murray Supply Co.	44	APR Supply Co.
45	Worly Plumbing Supply	45	Pacific Plumbing Supply Co. LLC	45	MSI HVAC
46	Aaron & Co.	46	Aaron & Co.	46	Northeastern Supply
47	Colonial Commercial Corp.	47	Farnsworth Wholesale	47	Plumb Supply Co.
48	Best Plumbing Tile & Stone	48	Redlon & Johnson	48	Robinson Supply Co.
49	Gateway Supply Co.	49	Bartle & Gibson Co. Ltd.	49	Wichita Sheet Metal Supply
50	Wolff Bros. Supply	50	General Plumbing Supply	50	Thrifty Supply

\* Editors' estimate All sales ranked in U.S. dollars

## INDEPENDENTS SHARE RESULTS

Howard Frankel, president of Central Plumbing Specialties/Grande Central Showrooms of New York (Yonkers, NY), noted that 2008 was the bellwether year for his company. "In 2009 we had our first drop-off ever, but 2010 has retrenched us back to 2008 levels," Frankel said. "We expect 2011 to surpass that."

Mike Michel, vice president of marketing at R.E. Michel (Glen Burnie, MD), observed, "Through acquisition and organic growth, we added seven locations in 2010, our 75th anniversary. We have five additional locations scheduled to open this year and are optimistic regarding business growth in 2011."

Kip Miller, president/CEO of Eastern Industrial Supplies (Greenville, SC), said, "Although our sales declined in our fiscal year ending September 2010, we met our annual return on equity goal. Our business is off to a fast start this year with sales and profits exceeding expectations for the period October through February."

Rogers Earl Jr., president/CEO of Valley Supply Co. (Elkins, WV), said that 2010 was a struggle in the West Virginia market area. "We did come out ahead by 13% at three locations," he noted. "One location was down. Overall, the whole company experienced an increase in sales. For 2011 we anticipate sales growth of 15%."

Michael Taylor, president, Columbia Specialty Co. (Long Beach, CA), noted that his company "experienced rough going through the first half of 2010 due to recessionary conditions in California, but improved through the second half of 2010 and continues sales gains into 2011."

Brian Tuohey, president, Collins Pipe & Supply (East Windsor, CT) said he expects a 12.5% sales increase in 2011.

## NOTABLE EXPANSION & ACQUISITIONS IN 2010

- Ferguson (Newport News, VA) completed the acquisition of Summit Pipe & Supply and Summit Pipe & Supply of Mississippi Dec. 31. Summit is a waterworks distributor with three locations in Northport and Wetumpka, AL, and Jackson, MS. All former Summit locations will operate as satellite locations of the Ferguson Santa Rosa, FL, branch.

- Irr Supply Centers (North Tonawanda, NY) acquired L.A. Hazard & Sons (Derby, NY), a 4-branch electrical, plumbing and heating product distributor that also operates two registered Kohler showrooms. The Hazard locations will continue to keep the L.A. Hazard name.

- Valley Supply (Elkins, WV) expanded its 100-year-old facility to create a new showroom, DreamScapes.

Source: Supply House Times/BNP Media Market Research 2011