

## Distributor POV: Market Leaders

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### **Industrial Distribution releases its annual list of the largest suppliers to the industrial marketplace.**

Industrial Distribution, IMPO's sister brand reaching the distribution channel, has been around for 102 years and published its annual Big 50 List for much of that time. Seen as a barometer of the health of the industry, this annual top 50 ranks industrial distributors based on sales revenue, while also creating benchmarks and increasing competitive knowledge for a highly fragmented industry.

### **Economic, Political Factors**

It seems the years since 2009 have carried extra meaning, as each Big 50 becomes more and more of a "survivor's list." The economic pressure has eased for many, although new, perhaps more troubling intangibles take its place: how to battle aggressive online competition, anticipate the effects of universal healthcare, and hedge fiscal and employment bets against the potential change heading into an election year.

And despite the economy being better, it's by no means "great." This summer marked three straight months of contraction of the economic activity in the manufacturing sector, according to the Manufacturing ISM Report on Business.

"We're looking at a softness and a slowdown in demand for manufacturing products, both domestically and internationally," says Brad Holcomb, CPSM, CPD, chair of the ISM Manufacturing Business Survey Committee. "Any improvements over the next few months will be incremental," he adds.

The new orders index also dipped below 50 in June for the first time since April of 2009. Perhaps even more disconcerting is the fact that only three of the 16 industries surveyed by ISM reported growth in new orders in July. Seven reported growth in June.

So for industrial distributors – often the businesses in the supply chain who can least afford to deal with these market dips – there's no easy way to move forward. Luckily, many on this year's list have through both internal and external opportunities.

### **M&A Drives Market Changes**

As pent-up demand for strategic acquisitions propelled change post-2010, we see a marketplace in fluctuation. Some emerge stronger from this massive change, and

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some don't emerge at all — all evidenced by the changes on this year's Big 50 List. By late spring of 2012, there were already 35 transactions in this market, according to C.A. Burkhardt of HT Capital Advisors, and the marketplace shows no signs of slowing.

This year's Big 50 companies had lots to say about acquisition, but also showed their ability to turn inward to improvements in warehousing, services, inventory management, IT, and staff development. It indicates a hunger amongst this group of companies to remain strong and stay ahead of the pack. What this means is, no matter the challenges set forth, the industrial distribution marketplace is not taking competition lying down. This type of aggressive planning and nimble response to a chaotic marketplace and global economy is what makes The Big 50 great, and each one of these companies appears to have truly earned their place.

As manufacturers, we hope this list can provide you with some insight into your supply chain - where your suppliers fit, as well as who has best honed their survival skills in the wake of tremendous economic and regulatory pressures.

*For further updates and analysis on each Big 50 company, visit [www.IndDist.com](http://www.IndDist.com) [2].*

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### **Industrial Distribution's BIG 50 List**

1. Wolseley (global) 21.3B
2. Sonepar 20.5B (14.7B euros)
3. Rexel 15.8B
4. Wurth Group 13.5B
5. W.W. Grainger 8.1B
6. HD Supply 7B
7. WESCO 6.1B
8. Anixter 6.1B
9. Graybar 5.4B
10. MRC Global 4.8B
11. Airgas 4.7B
12. Motion Industries 4.2B
13. Fastenal 2.8B
14. Wilson Industries 2.6B
15. Applied Industrial Technologies 2.2B
16. MSC 2B
17. ERIKS nv (Lewis Goetz) 1.9B
18. WinWholesale 1.8B
19. Edgen Group 1.7B
20. Interline Brands 1.2B
21. Kaman Industrial Technologies 951M
22. F.W. Webb 720M
23. BDI 592M
24. EIS, Inc. 558M
25. Turtle & Hughes 525M

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26. IDG 475M
27. Houston Wire & Cable 396M
28. Summit Electric Supply 359M
29. Barnes Distribution 355M
30. Essex Brownell 355M
31. Lawson Products 315M
32. EWIE Co, Inc. 304M
33. BlackHawk Industrial Distribution 260M
34. Gas & Supply 255M
35. AWC 253M
36. Hisco 237M
37. RS Hughes 229M
38. GHX Industrial 217M
39. Hydradyne 211M
40. Production Tool Supply 207M
41. FCX Performance 175M
42. Tencarva Machinery Corporation 175M
43. Womack 171M
44. Canadian Bearings 170M
45. Perry Supply 156M
46. OTP Industrial Solutions 151M
47. Kimball Midwest 149M
48. IBT 134M
49. Shively Bros. 119M
50. JGB 105M

*This year, we elected to refrain from listing any companies we were unable to obtain confirmed revenue numbers for, therefore there were a handful of companies we estimate would have earned a place on the list that were omitted.*

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