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Top 40 Industrial Distributors

Revenue growth ranged widely for the Top 40 industrial distributors, with companies heavily involved in oil & gas reporting declines in excess of 20 percent. Acquisitions boosted the bottom lines of other companies. On average, revenues declined 2.6 percent for distributors on this list.

1. W.W. Grainger: \$10.1 billion
2. HD Supply: \$7.4 billion
3. Airgas, an Air Liquide company: \$7.0 billion
4. Motion Industries: \$4.6 billion
5. The Fastenal Company: \$4.0 billion
6. McMaster-Carr: N/A
7. MRC Global Corp.: \$3.0 billion
8. Winsupply: \$3.0 billion
9. MSC Industrial Supply: \$2.9 billion
10. Applied Industrial Technologies: \$2.5 billion
11. NOW Inc. (DistributionNOW): \$2.1 billion
12. Wurth – Americas: \$1.9 billion
13. Vallen Distribution: N/A
14. Interline Brands: N/A
15. Edgen Murray: N/A
16. Wolseley Industrial Group: \$1.4 billion
17. Kaman Industrial Technologies: \$1.1 billion
18. F.W. Webb: \$1.0 billion
19. DXP Enterprises: \$962.0 million
20. ERIKS North America: N/A

21. Global Industrial: \$716.0 million
22. The United Distribution Group: N/A
23. Bearing Distributors Inc. (BDI): \$662.0 million
24. Turtle & Hughes: N/A
25. SunSource: N/A
26. Wajax: \$461.6 million
27. BlackHawk Industrial: N/A
28. Gas And Supply Co.: N/A
29. DGI Supply: N/A
30. FCX Performance: \$346 million
31. SBP Holdings Inc.: \$331.0 million
32. RS Hughes Co.: \$326.0 million
33. Lawson Products: \$276.6 million
34. AWC Inc.: \$274.6 million
35. Hisco, Inc: \$260.0 million
36. Dillon Supply Company: \$250 million
37. Ryan Herco Flow Solutions: N/A
38. OTP Industrial Solutions: N/A
39. Kimball Midwest: \$227.0 million
40. Hydradyne: N/A

For additional information on each company visit here:

mdm.com/2017-top-industrial-distributors

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Top 25 Electrical Distributors

Revenue growth among electrical distributors varied greatly in 2016, with the average among the Top 25 companies at 0.5 percent. The outlook for this sector is mostly positive for 2017, with many distributors hopeful of a ripple effect from increased infrastructure investment.

1. Sonepar North America: \$9.6 billion
2. WESCO International: \$7.3 billion
3. Graybar: \$6.4 billion
4. Anixter International Inc.: \$6.4 billion
5. Rexel Holdings USA/Rexel Canada: \$4.7 billion
6. Consolidated Electrical Distributors (CED): N/A
7. Border States Electric: N/A
8. Crescent Electric Supply Company: N/A
9. City Electric Supply: N/A
10. W.W. Grainger (electric/lighting): \$909.0 million
11. Mayer Electric Supply: \$817.0 million
12. Elliott Electric Supply: N/A
13. McNaughton-McKay Electric Company: \$725 million

14. EIS Inc.: \$715.6 million
15. The Reynolds Company: \$534.0 million
16. State Electric Supply Company: N/A
17. North Coast Electric: \$489.0 million
18. Turtle & Hughes: N/A
19. Summit Electric Supply: \$434.2 million
20. Kirby Risk: \$370.0 million
21. Dakota Supply Group: N/A
22. Van Meter Inc.: \$329.8 million
23. Kendall Electric: N/A
24. Werner Electric Supply Company: N/A
25. Wholesale Electric Supply Co. Of Houston: N/A

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Top 10 Power Transmission & Bearing Distributors

After years of volatility in markets connected to the oil & gas industry, power transmission and bearing distributors are looking to more stable markets for growth. Top target in 2017: food and beverage.

1. Motion Industries: \$1.7 billion
2. Applied Industrial Technologies: \$1.4 billion
3. Kaman Industrial Technologies: \$553.2 million
4. Bearing Distributors Inc. (BDI): \$397.2 million
5. Wajax Industrial Components: \$378.8 million
6. W.W. Grainger (power transmission/motors): \$304.1 million
7. The Fastenal Company (power transmission/bearing): \$277.3 million
8. OTP Industrial Solutions: N/A
9. DXP Enterprises (bearings & power transmission): \$144.3 million
10. CB (Canadian Bearings Ltd): N/A

For additional information on each company visit here:

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Top 10 HVACR & Plumbing Distributors

General sentiment in this sector is that the recovery cycle of recent years wasn't as robust as it should have been, but the industry is poised to accelerate in 2017. A pause on regulations from the federal government is welcome relief for HVACR & plumbing distributors.

1. Ferguson Enterprises Inc.: \$13.8 billion
2. Watsco: \$4.2 billion
3. Winsupply: \$3.0 billion
4. Hajoca: N/A
5. MORSCO: N/A
6. Wolseley Canada: \$1.3 billion
7. W.W. Grainger (HVAC): \$1.2 billion
8. Johnstone Supply: N/A
9. F.W. Webb: \$1.0 billion
10. R.E. Michel: N/A

For additional information on each company and an overview of trends for this sector, go to:

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Top 10 Building Materials & Construction Distributors

Acquisitions helped the Top 10 distributors in this space average 27.7 percent revenue growth in 2016. The sector was aided by mostly positive residential and commercial construction, which continues its steady climb from the nadir of the Great Recession, along with favorable weather.

1. ABC Supply Co.: \$8.5 billion
2. Builders FirstSource: \$6.4 billion
3. Beacon Roofing Supply: \$4.1 billion
4. BMC Stock Holdings Inc.: \$3.1 billion
5. Allied Building Products: \$2.6 billion
6. 84 Lumber: N/A
7. US LBM Holdings Inc.: N/A
8. HD Supply White Cap: \$2.1 billion
9. BlueLinx Corp.: \$1.9 billion
10. SRS Distribution: \$1.8 billion

For additional information on each company and an overview of trends for this sector, go to:

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Top 5 Electronics Distributors

The Top 5 electronics distributors registered modest growth in 2016, which saw continued focus on the internet of things and ways to “monetize the data that comes off the devices on a regular basis,” says Avnet CEO Bill Amelio.

1. Avnet: \$26.2 billion
2. Arrow Electronics: \$23.8 billion
3. Future Electronics: N/A
4. TTI Inc.: \$2.0 billion
5. Digi-Key Corp.: N/A

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Top Fasteners Distributors

Sales momentum for fasteners distributors saw a strong uptick in May, according to the latest FDI data. Forward indicators also remain positive, with survey respondents expecting June to be “even better.” But imports are on the rise, as well, and margins continue to be compressed.

Bisco Industries: \$148.0 million
Bossard America: \$193.1 million
Copper State Nut & Bolt: N/A
Eastern Industrial Supplies Inc: \$102.0 million
EFC International: N/A
Endries International (a Wolseley Industrial Group company): N/A
Kimball Midwest: \$227.0 million
KLX Inc.: \$865.6 million
Lawson Products: \$276.6 million
McMaster-Carr: N/A
MSC Industrial Supply: \$2.9 billion
Optimas OE Solutions LLC: N/A
The Fastenal Company (fasteners): \$1.5 billion
The Hillman Group: \$524.0 million
W.W. Grainger: N/A
Wesco Aircraft: \$711.2 million
Wurth - Americas: \$1.9 billion

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Top 10 Fluid Power Distributors

Smaller and smarter: These two words highlight the development direction for many of the fluid power products being brought to market these days. Products must be smaller and more efficient, and at the same time technology and sensors are becoming more important components.

1. Applied Industrial Technologies: \$680.2 million
2. Motion Industries (hydraulics & pneumatic): \$648.8 million
3. SunSource: N/A
4. FCX Performance: \$346.0 million
5. W.W. Grainger: \$304.1 million
6. Kaman Industrial Technologies: \$221.3 million
7. Hydradyne: N/A
8. Hydraquip: N/A
9. Womack Machine Supply Co \$111,000,000
10. Berendsen Fluid Power: N/A

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Top Gases & Welding Equipment Distributors

As gases & welding equipment distributors worked through the Air Liquide-Airgas deal, consolidation shook the sector for a second straight year with another blockbuster transaction – the \$70 billion merger of Praxair and Linde.

Airgas, an Air Liquide company: \$7.0 billion

Praxair: \$10.5 billion

Gas And Supply Co.: N/A

Norco Inc.: N/A

Roberts Oxygen Company: N/A

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Top 5 Hose & Accessories Distributors

Perceived commoditization continues to build, particularly as Amazon and other online players gain market share. Distributors are focusing on improving access to technical information and the ability to compare specifications in the field in order to demonstrate critical product differences and provide additional value.

1. United Distribution Group: N/A
2. SBP Holdings Inc. (Singer Equities): \$331.0 million
3. ERIKS North America: N/A
4. JGB Enterprises: N/A
5. Bridgestone HosePower: N/A

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Top 5 Industrial PVF Distributors

While oil & gas markets have started to stabilize, the point of stabilization is below half of the price peak seen just a few years ago. As a result, many distributors that operate in this space are either streamlining operations to reduce exposure to the volatility or further diversifying the markets they serve to offset the challenging conditions.

1. MRC Global Corp.: \$3.0 billion
2. NOW Inc. (DistributionNOW): \$2.1 billion
3. Edgen Murray: N/A
4. Wolseley Industrial Group: \$1.4 billion
5. FloWorks International LLC: N/A

For additional information on each company and an overview of trends for this sector, go to:

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Top Plastics Distributors

Sustainability is a core focus for the plastics industry. Although they may change under the current administration, regulations around environmental concerns have driven the industry to consider ways to reduce waste and come up with alternatives for waste disposal. Sustainability can also improve profitability and perception – attractive benefits for business.

Revenue estimates provided by *Global Plastics Letter*.

1. Laird Plastics, a Blackfriars company: \$575.0 million
2. Polymershapes, a Blackfriars company: \$525.0 million
3. Piedmont Plastics: \$335.0 million
4. Total Plastics: \$145.0 million
5. Curbell Plastics: \$140.0 million
6. Professional Plastics: \$120.0 million
7. ThyssenKrupp Engineered Plastics: \$95.0 million
8. Cope Plastics: \$92.0 million
9. E&T Plastics: \$70.0 million
10. Interstate Plastics: \$60.0 million

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Top Safety Distributors

Safety distributors note a growing customer focus on training versus products, as more distributors in other sectors expand into the traditional safety product market. Specialists looking to demonstrate value and differentiate are investing in consulting services for their customers.

Airgas, an Air Liquide company: N/A

Arbill Inc: N/A

Conney Safety Products (a division of WESCO Distribution): N/A

DXP Enterprises (safety): \$115.4 million

Fisher Scientific Company LLC: \$18.3 billion

Mallory Safety & Supply: \$104.0 million

Northern Safety & Industrial (a division of Wurth): \$180.0 million

Orr Safety: N/A

Safety Today: N/A

Stauffer Glove and Safety: N/A

The Fastenal Company (safety): \$594.3 million

VWR International: \$2.7 billion

W.W. Grainger (safety & security) \$1.8 billion

Wise Safety & Environmental: N/A

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Top Jan-San Distributors

Big-box retailers like Staples and e-commerce players like Amazon continue to threaten jan-san distributors, but the sector is also deflecting competition from medical suppliers and foodservice providers that are crossing over more into this space.

1. Staples (facilities & breakroom): \$2.1 billion
2. Veritiv Corp. (facility solutions): \$1.3 billion
3. W.W. Grainger (jan-san): \$912.3 million
4. Interline Brands: N/A
5. WAXIE Sanitary Supply: N/A

Other Regional Distributors

DadePaper: N/A
Dalco Enterprises: N/A
EBP Supply Solutions: N/A
The Fastenal Company (jan-san): \$317.0 million
Hill & Markes: N/A
HP Products – a Ferguson Enterprise: N/A
KelSan: N/A
Pollock Paper: N/A
Strauss Paper: \$62.0 million
WB Mason: N/A
Western Paper Distributors: N/A

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