

Tool Distribution Market Report - UK 2017-2021 Analysis

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Introduction and Overview

The fourth edition of the 'Tool Distribution Market Report - UK 2017-2021 Analysis' provides an informed and up-to-date review of this complex and fragmented market, and includes a review of recent market trends and forecasts of sector developments up to 2021.



Key issues covered in the report include:

- Detailed market assessment - hand and power portable tools used in the building, DIY and construction industries, as well as domestic garden tools.
- Recent market performance and forecasts through to 2021.
- Key distribution channels - review of channel shares, fragmentation, trends etc.
- Analysis by product group - market size, key trends and recent changes, product mix and distribution.

Areas of particular interest include:

- Analysis of the hand and power tools market, market size and development 2012 to 2017 and forecasts to 2021. Key market influences driving current and future performance of the market.
- Identification of key distribution channels - Home Improvement Multiples, Industrial Products Distributors, Tool Specialists, Builders Merchants, 'others' - review of channel shares, trends etc.
- Distribution channel development - shift to Omni channel, growth of Screwfix / Toolstation, increasing influence of the Internet; development of other channels, e.g. builders merchants, home improvement multiples, electrical wholesalers, etc.
- Review of key players in 'tool distribution' market - operations and activity in the market. The strength of Kingfisher, Travis Perkins group operations etc.
- Review of key product groups - driving, drilling & breaking tools, cutting & grinding tools, carpentry & woodworking tools, and garden tools - product sector sizes, review of major sectors, trends in power and hand tools, distribution channel shares by product group etc.

- Detailed market data and insight on the tool distribution market by AMA Research, a leading UK provider of construction market intelligence.

Some of the Companies included:

Abingdon King Dick, Amazon, Andrea Stihl, Apex Tool Group (Lufkin, Crescent & Wiss), Arco, Arrow Fasteners (Masco Corp), Atlas Copco, Bahco, B&M Retail, B & Q, Belle Engineering (Sheen), Brammer plc, Buck and Hickman, Bulldog Tools, Carl Kammerling International Ltd, Clarke International, Cromwell Tools, Draper Tools, Earlex (part of Wagner Group), Einhell, Erbauer, Eriks Industrial Services, Estwing, Wera, Evolution, Faithfull (Toolbank), Fein Industrial Power Tools (UK), Festool, Fiskars, Forge Steel, Global Garden Products, Grafton Group, Hilka Tools, Hilti (Great Britain) Ltd, Hitachi Power Tools (UK), Homebase, Hultafors. Husqvarna, ITW Construction Products, Jack Sealey Ltd, JCB, Joseph Bentley, Kingfisher plc, Kobe Tools, Lie-Nielsen, Machine Mart Limited, Mafell, Makita (UK) Ltd, Marshalltown, Metabo (UK), Olympia Tools (Roughneck), Ozito, Stanley Black & Decker, Ragni, Robert Bosch Ltd, Robert Sorby, Rollins Group (Bulldog), RS Components, Techtronic Industries Co Ltd, Panasonic Electric Works UK, Saint-Gobain Building Products Distribution, Scheppach, Screwfix, SIG plc, Spear & Jackson, Stabila, Stahlwille, Stanley Black & Decker, Stihl Group, Tacwise, Techtronic Industries Co Ltd (TTI Group), The Scotts Miracle-Gro Company, The Toro Company, Thor Hammer, Titan, Toolstation, Toolbank, Travis Perkins, Wickes, Wilkinson Sword Ltd, Wilkos. Walseley, Worz, Yeoman.

The Tool Distribution Market

- Tool distribution market - key characteristics of the market, analysis by value from 2012-2016, with forecasts to 2021.
- Market structure - analysis of suppliers, distributors, buying groups, contractors and end-users.
- Market trends and factors influencing market development - legislation, construction trends, housebuilding & RMI forecasts up to 2021.
- Market shares of key distribution channels - Key channels, shares, product mix, recent trends & changes in distribution, buying trends etc. Overview of key groups (Kingfisher, Travis Perkins etc).
- Home Improvement Multiples - sector overview, market positioning, product/customer strengths, relative importance of tools, key players - B&Q, Homebase, Wickes etc.
- Industrial/Consumable Products Distributors - sector overview, market positioning, product/customer strengths, relative importance of tools, key players profiles e.g. Screwfix, Machine Mart, Cromwell Tools, Brammer, etc.
- Tool Specialists - overview, market positioning, product/customer strengths, relative importance of tools, key players, e.g. Toolstation, Toolbank, Axminster Power Tool Centre etc.
- Builders & Plumbers Merchants - sector overview, market positioning, product/customer strengths, relative importance of tools, key players' profiles.
- Internet/Catalogue/Mail Order - key players, development of this channel.
- Other channels - e.g. garden centres, independent hardware/ DIY stores, electrical wholesalers, etc.

Products and Suppliers

- Product groups reviewed: driving, drilling & breaking tools, cutting & grinding tools, carpentry & woodworking tools, and garden tools - product sector value mix and recent trends.
- Market shares of professional & DIY tools, power & hand tools and cordless & corded power tools. Overview of trends, changes and future prospects, market maturity.
- Analysis by product group - market size 2012-2017 for each product sector and trends, influences etc. Key manufacturers

- and distribution channel mix for each product group.
- Overall sector sizes for each product group, mix between channels.
- Estimated shares in 2016 of the main product groups by the key channels.

Market Prospects

- Forecast of market development - short term prospects in 2017 and medium term prospects up to 2021.
- Positive and negative factors affecting the market - performance of UK economy, housebuilding & non-domestic construction (including private and public sector performance), consumer confidence & spending, product development.

Report Summary

This report analyses the market for portable power and hand tools, for use in building, home improvement and garden applications - incorporating both professional and DIY tool versions, but excludes industrial and automotive uses, and large/machine tools. Tool distribution comprises a number of routes to market including home improvement multiples, industrial products distributors, builders' merchants, tool specialists and the Internet.

Higher levels of non-domestic construction, housebuilding and RMI work (repair, maintenance & improvement), along with product innovations all supported value growth in 2013 and 2014. These trends continued in 2015 and 2016 when the market saw growth of 3-4% per annum. The improving UK economy, higher levels of construction & RMI activity and increasing consumer confidence & spending assisted market growth.

Tool distribution comprises a mix of large national players competing with many regional and local companies, in both trade and consumer channels. Buying behaviour, influenced by digital technology, has seen a change in the way companies deliver their proposition. Operating a transactional website has become increasingly important, and this has meant an increase in multi-channel and omni-channel retailing, with the Internet emerging as a key channel.

Prospects for the overall market are generally positive, with moderate growth expected in the domestic sector and also across some non-domestic construction sectors. Steady demand in the garden tool sector is also expected to underpin the market. It is estimated that the tools distribution market will continue to grow by around 3% per annum to 2021.

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