See all 14 sector lists and sector trends analysis at www.mdm.com/marketleaders
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. OTP Industrial Solutions: $326.0 million
34. Lawson Products: $276.6 million
35. AWC Inc.: $274.6 million
36. Hisco, Inc: $260.0 million
37. Dillon Supply Company: $250 million
38. Ryan Herco Flow 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

mdm.com/2017-sector-trends

Methodology Note: Unless otherwise noted revenues reflect the 2016 fiscal year. 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. In the end, not every company was willing to provide us with revenue data for 2016, yet we deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).

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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.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company Name</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sonepar North America</td>
<td>$9.6 billion</td>
</tr>
<tr>
<td>2</td>
<td>WESCO International</td>
<td>$7.3 billion</td>
</tr>
<tr>
<td>3</td>
<td>Graybar</td>
<td>$6.4 billion</td>
</tr>
<tr>
<td>4</td>
<td>Anixter International Inc.</td>
<td>$6.4 billion</td>
</tr>
<tr>
<td>5</td>
<td>Rexel Holdings USA/Rexel Canada</td>
<td>$4.7 billion</td>
</tr>
<tr>
<td>6</td>
<td>Consolidated Electrical Distributors (CED)</td>
<td>N/A</td>
</tr>
<tr>
<td>7</td>
<td>Border States Electric</td>
<td>N/A</td>
</tr>
<tr>
<td>8</td>
<td>Crescent Electric Supply Company</td>
<td>N/A</td>
</tr>
<tr>
<td>9</td>
<td>City Electric Supply</td>
<td>N/A</td>
</tr>
<tr>
<td>10</td>
<td>W.W. Grainger (electric/lighting)</td>
<td>$909.0 million</td>
</tr>
<tr>
<td>11</td>
<td>Mayer Electric Supply Company</td>
<td>$817.0 million</td>
</tr>
<tr>
<td>12</td>
<td>Elliott Electric Supply Company</td>
<td>N/A</td>
</tr>
<tr>
<td>13</td>
<td>McNaughton-McKay Electric Company</td>
<td>$725 million</td>
</tr>
<tr>
<td>14</td>
<td>EIS Inc.</td>
<td>$715.6 million</td>
</tr>
<tr>
<td>15</td>
<td>The Reynolds Company</td>
<td>$534.0 million</td>
</tr>
<tr>
<td>16</td>
<td>State Electric Supply Company</td>
<td>N/A</td>
</tr>
<tr>
<td>17</td>
<td>North Coast Electric</td>
<td>$489.0 million</td>
</tr>
<tr>
<td>18</td>
<td>Turtle &amp; Hughes</td>
<td>N/A</td>
</tr>
<tr>
<td>19</td>
<td>Summit Electric Supply Company</td>
<td>$434.2 million</td>
</tr>
<tr>
<td>20</td>
<td>Kirby Risk</td>
<td>$370.0 million</td>
</tr>
<tr>
<td>21</td>
<td>Dakota Supply Group</td>
<td>N/A</td>
</tr>
<tr>
<td>22</td>
<td>Van Meter Inc.</td>
<td>$329.8 million</td>
</tr>
<tr>
<td>23</td>
<td>Kendall Electric</td>
<td>N/A</td>
</tr>
<tr>
<td>24</td>
<td>Werner Electric Supply Company</td>
<td>N/A</td>
</tr>
<tr>
<td>25</td>
<td>Wholesale Electric Supply Co. Of Houston</td>
<td>N/A</td>
</tr>
</tbody>
</table>

For additional information on each company visit here: mdm.com/2017-top-electrical-distributors

Methodology Note: Unless otherwise noted revenues reflect the 2016 fiscal year. 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. In the end, not every company was willing to provide us with revenue data for 2016, yet we deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).
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.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Revenue (2016)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Motion Industries</td>
<td>$1.7 billion</td>
</tr>
<tr>
<td>2</td>
<td>Applied Industrial Technologies</td>
<td>$1.4 billion</td>
</tr>
<tr>
<td>3</td>
<td>Kaman Industrial Technologies</td>
<td>$553.2 million</td>
</tr>
<tr>
<td>4</td>
<td>Bearing Distributors Inc. (BDI)</td>
<td>$397.2 million</td>
</tr>
<tr>
<td>5</td>
<td>Wajax Industrial Components</td>
<td>$378.8 million</td>
</tr>
<tr>
<td>6</td>
<td>OTP Industrial Solutions</td>
<td>$326.0 million</td>
</tr>
<tr>
<td>7</td>
<td>W.W. Grainger (power transmission/motors)</td>
<td>$304.1 million</td>
</tr>
<tr>
<td>8</td>
<td>The Fastenal Company (power transmission/bearing)</td>
<td>$277.3 million</td>
</tr>
<tr>
<td>9</td>
<td>DXP Enterprises (bearings &amp; power transmission)</td>
<td>$144.3 million</td>
</tr>
<tr>
<td>10</td>
<td>CB (Canadian Bearings Ltd)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

For additional information on each company visit here: mdm.com/2017-top-power-transmission-bearings-distributors

Methodology Note: Unless otherwise noted revenues reflect the 2016 fiscal year. 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. In the end, not every company was willing to provide us with revenue data for 2016, yet we deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).
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: 

mdm.com/2017-top-hvacr-plumbing-distributors

mdm.com/2017-sector-trends

Methodology Note: Unless otherwise noted revenues reflect the 2016 fiscal year. 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. In the end, not every company was willing to provide us with revenue data for 2016, yet we deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).
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:

mdm.com/2017-top-building-materials-distributors

mdm.com/2017-sector-trends

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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

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

mdm.com/2017-top-electronics-distributors

mdm.com/2017-sector-trends

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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.

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

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

mdm.com/2017-top-fasteners-distributors

Methodology Note: Unless otherwise noted revenues reflect the 2016 fiscal year. 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. In the end, not every company was willing to provide us with revenue data for 2016, yet we deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).

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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

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

mdm.com/2017-top-fluid-power-distributors

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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

For additional information on each company and an overview of trends for this sector, go to: mdm.com/2017-top-gases-distributors

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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

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

mdm.com/2017-top-hose-accessories-distributors

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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:

mdm.com/2017-top-industrial-pipes-valves-fittings-pvf-distributors

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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

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

mdm.com/2017-top-plastics-distributors

mdm.com/2017-sector-trends

Methodology Note: Unless otherwise noted revenues reflect the 2016 fiscal year. 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. In the end, not every company was willing to provide us with revenue data for 2016, yet we deemed it important to include them anyway (e.g. McMaster-Carr, SunSource, etc.).
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.

<table>
<thead>
<tr>
<th>Company</th>
<th>Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airgas, an Air Liquide company</td>
<td>N/A</td>
</tr>
<tr>
<td>Arbill Inc</td>
<td>N/A</td>
</tr>
<tr>
<td>Conney Safety Products (a division of WESCO Distribution)</td>
<td>N/A</td>
</tr>
<tr>
<td>DXP Enterprises (safety)</td>
<td>$115.4 million</td>
</tr>
<tr>
<td>Fisher Scientific Company LLC</td>
<td>$18.3 billion</td>
</tr>
<tr>
<td>Mallory Safety &amp; Supply</td>
<td>$104.0 million</td>
</tr>
<tr>
<td>Northern Safety &amp; Industrial (a division of Wurth)</td>
<td>$180.0 million</td>
</tr>
<tr>
<td>Orr Safety</td>
<td>N/A</td>
</tr>
<tr>
<td>Safety Today</td>
<td>N/A</td>
</tr>
<tr>
<td>Stauffer Glove and Safety</td>
<td>N/A</td>
</tr>
<tr>
<td>The Fastenal Company (safety)</td>
<td>$594.3 million</td>
</tr>
<tr>
<td>VWR International</td>
<td>$2.7 billion</td>
</tr>
<tr>
<td>W.W. Grainger (safety &amp; security)</td>
<td>$1.8 billion</td>
</tr>
<tr>
<td>Wise Safety &amp; Environmental</td>
<td>N/A</td>
</tr>
</tbody>
</table>

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

[mdm.com/2017-top-safety-distributors](http://mdm.com/2017-top-safety-distributors)

[mdm.com/2017-sector-trends](http://mdm.com/2017-sector-trends)
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

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

[mdm.com/2017-top-jan-san-distributors](mdm.com/2017-top-jan-san-distributors)

[mdm.com/2017-sector-trends](mdm.com/2017-sector-trends)

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Get Exclusive Access to the 2017 Distribution Trends Special Issue

Each year, MDM publishes this comprehensive report on trends impacting the wholesale distribution industry, covering 15 sectors. Here are some of the trends our analysts identified this year:

1. How Amazon is driving B2B customer expectations offline
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3. How data is driving successful distributors’ strategies throughout their businesses

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