

Estimated market shares of concrete block companies in Great Britain (2008)

Contents

| | <u>Page No</u> |
|---|----------------|
| 1 Market review | 1 |
| 2 BDS forecast of concrete block demand, 2009 – 2012 | 7 |
| 3 Review of market shares and capacities | 10 |
| 4 Estimated outputs & shares of aggregate building block plants (2008) | |
| South East | 14 |
| South West | 15 |
| West Midlands | 16 |
| East Midlands | 16 |
| East Anglia | 17 |
| Yorkshire & Humberside | 17 |
| North West | 18 |
| Northern | 18 |
| Wales | 19 |
| Scotland | 20 |
| Summary of aggregate building block outputs by company and region | 21 |
| 5 Estimated outputs & shares of aircrete block companies by plant & region (2008) | |
| South East | 22 |
| South West | 22 |
| West Midlands | 22 |
| East Midlands | 22 |
| Yorkshire & Humberside | 22 |
| Summary of aircrete blocks outputs by company and region | 23 |

Graphs:

| | |
|---|---|
| 1. Total building block deliveries 1985-2008 | 1 |
| 2. Trend of block deliveries, housing starts and mortgage lending | 2 |
| 3. Volume of block deliveries by type 1985-2008 | 4 |
| 4. Proportion of dwellings built of timber since 1998 | 5 |
| 5. Trends in house type since 1998 | 6 |

Tables:

| | |
|--|----|
| 1. Percentage change in block production, 2008 on 2007 | 3 |
| 2. % of block deliveries by type of block, 1990-2008 | 4 |
| 3. Prospects for 2009 – producer’s responses | 8 |
| 4. BDS forecast for block demand, 2009-2012 | 9 |
| 5. Plants closed since 2006 | 10 |
| 6. Estimated shares of the top ten block companies 2008 | 12 |
| 7. Comparison of market shares 2000, 2002, 2004, 2006, 2007 & 2008 | 13 |

4. Estimated outputs and shares of aggregate building block plants (2008)

Region: South East

| <u>Company</u> | <u>Works</u> | <u>County</u> | <u>est. output</u> <u>'000 (m²)</u> | <u>Total</u> | <u>% Share</u> |
|----------------------|--------------|---------------|---|--------------|----------------|
| Hanson | Southampton | Hampshire | xxx | | |
| | Ringwood | Hampshire | xxx | | |
| | Milton | Oxfordshire | xxxx | | |
| | Medway | Kent | xxx | | |
| | Purfleet | Essex | xxx | xxxx | xx.x% |
| Tarmac | Ford | West Sussex | xxx | | |
| | Ninfield | East Sussex | xxx | xxxx | xx.x% |
| Cemex | Northfleet | Kent | xxxx | xxxx | xx.x% |
| Lignacite | Nazeing | Essex | xxx | xxx | x.x% |
| Thakeham Tile | Storrington | West Sussex | xxx | xxx | x.x% |
| Aggregate Industries | Vectis | Isle of Wight | xx | xx | x.x% |
| <hr/> | | | | | |
| Total | | | | xxxx | 100.0% |

Hanson Southampton closed 2008 - production transferred to Ringwood