

ROUGHER ROADS AHEAD

It's a numbers game for leading LBM dealers **By HBSDealer Staff**

Sales were strong for prodealers in 2021 as they continued to ride a surge in the housing and remodeling markets.

In 2021, total housing starts jumped ahead 15.6% to 1.6 million total. Single-family starts climbed by 13.4% to a total of 1.12 million last year. At the same time, 2021 multifamily starts finished 22.1% above the prior year.

Despite supply chain issues and higher material costs, the housing market continued to move ahead of last year.

Builders FirstSource, the national's largest prodealer, reported second quarter 2022 net sales increased 24.2% to \$6.9 billion compared to sales of \$5.6 billion in the second quarter for 2021. The increase included core organic sales growth of 12.2%.

Another industry titan, 84 Lumber, reached another new company milestone in 2021 with sales reaching nearly \$9 billion.



And remodeling might see signs of a slowdown, the forecast is for a sales increase over the next two years. The Remodeling Futures Program at the Joint Center for Housing Studies (JCHS) of Harvard University, projects year-over-year gains in remodeling expenditures will rise 17.4% in 2022 and by 10.1% next year.

But on a year-over-year basis, inflation and housing affordability are likely to have a very big influence on sales gains for prodealers in 2022.

Although the Producer Price Index for softwood lumber increased 2.3% in July, lumber prices have fallen more than 28% on a year-to-date basis.

On a year-over-year basis, the cost of trucking and transporting materials has risen by as much as 25% in 2022.

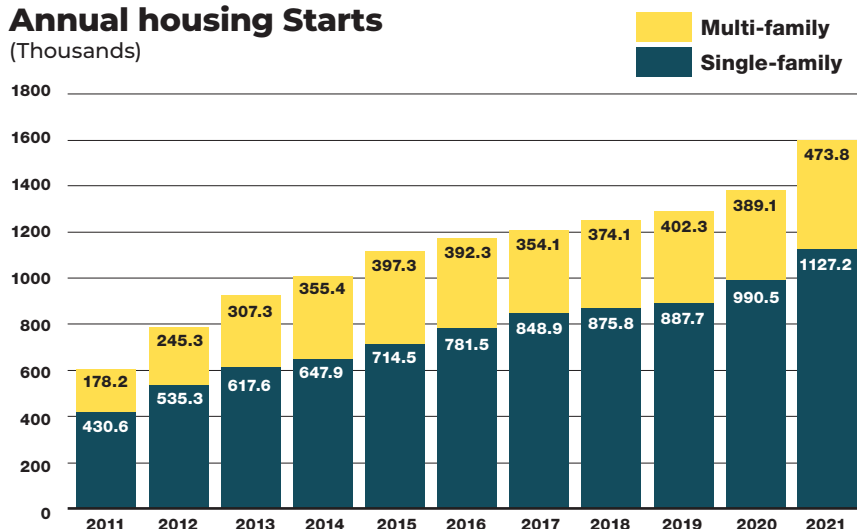
At the same time inflation and rising mortgage rates have led to a slowdown in new home sales and housing starts in 2022.

Sales of new single-family houses in July 2022 fell 12.6% to a seasonally adjusted annual rate of 511,000. This is nearly 30% below the July 2021 estimate of 726,000.

Affordability issues are pushing potential home buyers out of the market, especially first-time buyers.

The average new home price shot up nearly 20% in July to \$546,800 compared to the same period last year. "The sharp drop in new home sales

Annual housing Starts
(Thousands)



Source: U.S. Census Bureau

ABOUT THE LIST

The 2022 Top 200 ProDealer Industry Scoreboard tracks companies that sell lumber and building materials to homebuilders and contractors. To be included, the majority of a company's sales must be to the pro customer, as opposed to the homeowner or DIY customer. Information is gathered from several sources: corporate statements, published reports and interviews. Estimates are noted in the listings by an asterisk.

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is another clear indicator that housing is in a recession,” said Danushka Nanayakkara-Skillington, assistant vice president for forecasting and analysis at the National Association of Home Builders. “The combination of higher prices and increased interest rates are generating a notable slowing of the housing market.”

Housing starts for July 2022 decreased nearly 10% and were down more than 8% on a year-over-year basis. Single-family starts decreased 10.1% for the month and have retreated 18.5% from the July 2021 rate.

Home builder sentiment also continues to decline as buyer traffic has slowed. Builder confidence, as measured by the NAHB, has fallen for eight straight months as of August of this year. Affordability is the key issue, according to home builders.

And as of July of this year, the new home supply had swelled to nearly an 11-month supply meaning many new homes have been built but remain empty and unsold. **HBS**

Rank	Company Location of Headquarters	2021 \$ Sales	Units
1	Builders FirstSource Dallas, Texas	19,893,856,000	565
2	ABC Supply Beloit, Wisc.	14,800,000,000	839
3	Ferguson (1) Newport News, Va.	10,028,480,000	1,470
4	US LBM Holdings Buffalo Grove, Ill.	9,220,000,000	441
5	84 Lumber Eighty Four, Pa.	7,900,000,000	272
6	Beacon Building Products Herndon, Va.	6,642,000,000	446
7	Fastenal Winona, Minn.	6,010,900,000	3,209
8	SRS Distribution McKinney, Texas	5,400,000,000	595
9	GMS Tucker, Ga.	4,634,900,000	337
10	Floor & Decor Holdings Atlanta, Ga.	3,433,533,000	160
11	Foundation Building Materials* Tustin, Calif.	2,650,000,000	221
12	Carter Lumber Kent, Ohio	2,600,000,000	168
13	Kodiak Building Partners Denver, Colo.	2,500,000,000	95
14	Sutherland Lumber* Kansas City, Mo.	1,430,000,000	50
15	McCoy's Building Supply* San Marcos, Texas	1,425,000,000	92
16	Lansing Building Products* Richmond, Va.	1,325,000,000	114
17	Service Partners (TopBuild)* Daytona Beach, Fla.	1,270,000,000	155
18	LL Flooring Toano, Va.	1,152,344,000	424
19	Parr Lumber Hillsboro, Ore.	990,900,000	43
20	Foxworth-Galbraith Lumber Dallas, Texas	927,000,000	35

Rank	Company Location of Headquarters	2021 \$ Sales	Units
21	Contractor's Warehouse Roseville, Calif.	845,000,000	14
22	Matheus Lumber Woodinville, Wash.	750,000,000	10
23	Professional Builders Supply Morrisville, N.C.	700,000,000	12
24	Ganahl Lumber Co. Anaheim, Calif.	666,700,000	10
25	Riverhead Building Supply* Calverton, N.Y.	555,000,000	19
26	CNRG Collierville, Tenn.	530,000,000	144
27	Mead Lumber Columbus, Neb.	462,500,000	48
28	Sunpro Corp. Saint George, Utah	453,000,000	16
29	Shelter Products Portland, Ore.	437,000,000	5
30	Trussway Manufacturing Houston, Texas	400,100,000	7
31	R.P. Lumber Edwardsville, Ill.	390,000,000	107
32	Alpine Lumber* Westminster, Colo.	380,000,000	20
33	Franklin Building Supply Boise, Idaho	371,200,000	14
34	The Tile Shop Plymouth, Minn.	370,700,000	143
35	Hammond Lumber Belgrade, Maine	363,000,000	21
36	Mill Creek Lumber & Supply Tulsa, Okla.	362,000,000	26
37	Idaho Pacific Lumber Boise, Idaho	343,000,000	13
38	Drexel Building Supply Campbellsport, Wis.	336,200,000	9
39	Stine Sulphur, La.	320,000,000	11
40	Reliable Wholesale Lumber Huntington Beach, Calif.	310,000,000	2

* Indicates data estimates

Rank	Company Location of Headquarters	2021 \$ Sales	Units
41	E.C. Barton* Jonesboro, Ark.	296,000,000	112
42	Hancock Lumber Co. Casco, Maine	294,500,000	13
43	Curtis Lumber Ballston Spa, N.Y.	290,700,000	23
44	Stark Truss Canton, Ohio	279,900,000	14
45	Erie Materials Syracuse, N.Y.	268,900,000	10
46	Guy C. Lee Building Materials Smithfield, N.C.	254,000,000	8
47	Tibbetts Lumber St. Petersburg, Fla.	243,000,000	7
48	Ring's End* Darien, Conn.	240,000,000	20
49	Scherer Brothers Brooklyn Park, Minn.	230,000,000	5
50	Great Floors Coeur d'Alene, Idaho	227,000,000	21
51	LaValley/Middleton Building Supply Newport, N.H.	225,500,000	14
52	The Building Center Pineville, N.C.	221,700,000	7
53	Koopman Lumber Whitinsville, Mass.	216,000,000	10
54	Lezzer Lumber Curwensville, Pa.	214,200,000	15
55	HPM Building Supply Keaau, Hawaii	211,000,000	16
56	Friedman's Home Improvement Santa Rosa, Calif.	205,000,000	7
57	Western Building Center Kalispell, Mont.	205,000,000	15
58	Keim Lumber Charm, Ohio	204,700,000	2
59	Bliffert Lumber & Fuel Milwaukee, Wis.	201,100,000	8
60	M.G. Building Materials* San Antonio, Texas	200,000,000	12
61	Star Lumber Wichita, Kan.	191,900,000	7
62	Spahn & Rose Dubuque, Iowa	190,000,000	25
63	Burton Lumber* Salt Lake City, Utah	189,000,000	10
64	Bloedorn Lumber Torrington, Wyo.	185,000,000	25
65	McCray Lumber & Millwork Overland Park, Kan.	183,600,000	7
66	Kuiken Brothers* Fair Lawn, N.J.	180,000,000	9
67	Big C Lumber Granger, Ind.	176,800,000	18
68	Hayward Lumber Monterey, Calif.	175,000,000	13
69	Honsador Lumber Kapolei, Hawaii	169,200,000	17
70	Timberland Lumber Brazil, Ind.	167,200,000	3

Rank	Company Location of Headquarters	2021 \$ Sales	Units
71	Jerry's Home Improvement* Eugene, Ore.	164,000,000	2
72	Buccheit* Perryville, Mo.	160,000,000	10
73	Central Valley Builders Supply Napa, Calif.	159,000,000	8
74	Belletetes Jaffrey, N.H.	155,500,000	9
75	TAL Holdings* Vancouver, Wash.	153,000,000	16
76	Harbin Lumber* Lavonia, Georgia	150,000,000	7
77	Erickson Companies* Chandler, Ariz.	149,000,000	4
78	Builders Warehouse Kearney, Neb.	146,800,000	7
79	T.H. Rogers Lumber Edmond, Okla.	141,000,000	39
80	Valu Home Centers Buffalo, N.Y.	140,000,000	36
81	Builder's Discount Centers Rocky Mount, N.C.	140,000,000	11
82	Mans Lumber & Millwork Trenton, Mich.	137,700,000	5
83	Jackson Lumber & Millwork Lawrence, Mass.	136,500,000	5
84	Russell Do it Centers Alexander City, Ala.	136,000,000	9
85	Avalon Carpet Tile & Flooring Cherry Hill, N.J.	132,500,000	17
86	Beisser Lumber Grimes, Iowa	132,000,000	3
87	Cassity Jones Lumber Longview, Texas	129,300,000	9
88	Your Building Centers Altoona, Pa.	129,100,000	17
89	Wheelwright Lumber Company Ogden, Utah	124,000,000	1
90	O.C. Cluss Lumber Uniontown, Pa.	120,000,000	4
91	Wilson Lumber Huntsville, Ala.	119,000,000	6
92	Yoder's Building Supply Fair Play, S.C.	118,300,000	1
93	Zuern Building Products Allenton, Wis.	118,000,000	7
94	Gleckler & Sons Building Supplies Jacksonville, Fla.	117,000,000	5
95	Truckee Tahoe Lumber Reno, Nev.	115,400,000	6
96	Builders Supply Co.* Omaha, Neb.	115,000,000	1
97	Talbert Building Supply Roxboro, N.C.	112,900,000	5
98	Woodhaven Lumber & Millwork* Lakewood, N.J.	112,000,000	4
99	Florence Building Materials * Huntington, N.Y.	110,000,000	2
100	Viking Lumber* Belfast, Maine	110,000,000	9

* Indicates data estimates

Rank	Company Location of Headquarters	2021 \$ Sales	Units
101	Jaeger Lumber Union, N.J.	109,000,000	8
102	Graves Lumber Copley, Ohio	105,300,000	1
103	The Lester Group* Martinsville, Va.	105,000,000	7
104	Simonson Lumber St. Cloud, Minn.	105,000,000	5
105	Garris Evans Lumber Greenville, N.C.	104,000,000	5
106	Howard Lumber & Hardware* Statesboro, Ga.	103,000,000	2
107	Gillman Home Centers Batesville, Ind.	101,000,000	14
108	Nonn's Flooring Middleton, Wis.	101,000,000	4
109	Guthrie Lumber Livonia, Mich.	101,000,000	1
110	rk Miles Manchester Center, Vt.	100,000,000	10
111	Griffin Lumber & Hardware Cordele, Ga.	96,000,000	9
112	Ashby Lumber* Berkeley, Calif.	96,000,000	2
113	Randall Brothers* Marietta, Ga.	95,000,000	4
114	Busy Beaver Building Centers Pittsburgh, Pa.	92,000,000	25
115	Millard Lumber* Omaha, Neb.	89,000,000	3
116	Tindell's Building Materials Knoxville, Tenn.	88,800,000	10
117	Builders Supply Co Lancaster, S.C.	87,500,000	1
118	Arnold Lumber West Kingston, R.I.	87,400,000	4
119	Buck Lumber Charleston, SC	86,800,000	1
120	A1 Industries Fort Pierce, Fla.	83,700,000	2
121	Oldham Lumber* Dallas, Texas	83,000,000	
122	Big Creek Lumber Davenport, Calif.	83,000,000	
123	Moynihan Lumber North Reading, Mass.	82,600,000	3
124	Doug Ashy Building Materials Lafayette, La.	82,000,000	8
125	Builders' General Supply Little Silver, N.J.	82,000,000	6

Rank	Company Location of Headquarters	2021 \$ Sales	Units
126	Thrifty Building Supply Collierville, Tenn.	81,000,000	4
127	Chelsea Lumber Company* Chelsea, Mich.	81,000,000	3
128	Airbase Carpet Mart New Castle, Del.	80,700,000	20
129	City Mill Honolulu, Hawaii	80,000,000	8
130	NorCal Lumber Marysville, Calif.	80,000,000	1
131	Christensen Lumber Fremont, Neb.	80,000,000	3
132	Warner Robins Supply Warner Robins, Ga.	80,000,000	8
133	Williams Lumber & Home Centers Rhinebeck, N.Y.	80,000,000	7
134	Potter's Ace Home Centers Jamestown, Tenn.	79,000,000	21
135	Dunn Lumber Seattle, Wash.	76,800,000	9
136	Bellevue Builders Supply Schenectady, N.Y.	76,000,000	1
137	Blue Ridge Lumber Blairstown, N.J.	75,200,000	5
138	Rio Grande Building Materials Denver, Colo.	75,000,000	6
139	Concord Lumber Littleton, Mass.	75,000,000	6
140	McSwain Carpets & Floors Cincinnati, Ohio	74,000,000	9
141	Kleet Lumber Huntington, N.Y.	72,000,000	1
142	Ed Herrington* Hillsdale, N.Y.	71,000,000	6
143	H.J. Martin & Son Green Bay, Wis.	70,900,000	2
144	Townsend Building Supply Dothan, Ala.	70,800,000	7
145	Seattle Lighting Fixture Seattle, Wash.	70,000,000	6
146	Goldsboro Builders Supply Goldsboro, N.C.	70,000,000	6
147	Virginia Contractors Supply Manassas Park, Va.	66,500,000	2
148	Associated Building Supply Oxnard, Calif.	65,900,000	8
149	Louis J. Grasmick Lumber* Baltimore, Md.	65,000,000	1
150	Arlington Coal & Lumber Arlington, Mass.	65,000,000	7

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Rank	Company Location of Headquarters	2021 \$ Sales	Units
151	Niehaus Lumber Vincennes, Ind.	65,000,000	4
152	Lummus Supply Company Atlanta, Ga.	63,400,000	5
153	Ziegler Lumber* Spokane, Wash.	63,000,000	6
154	Humphrey's Building Supply Center Tiverton, R.I.	62,000,000	5
155	Bethel Mills Bethel, Vt.	60,000,000	8
156	Apex Lumber Company* Tulsa, Okla.	60,000,000	2
157	Sterling Lumber & Investment Westminster, Colo.	60,000,000	12
158	Bender Lumber* Bloomington, Ind.	59,000,000	1
159	Home Lumber New Haven, Ind.	58,400,000	1
160	Chinook Lumber Snohomish, Wash.	58,000,000	3
161	Dykes Lumber Weehawken, N.J.	58,000,000	9
162	Floor Covering Associates Shorewood, Ill.	57,500,000	5
163	Dolan's Lumber Benicia, Calif.	56,000,000	4
164	Western Wholesale Flooring Salt Lake City, Utah	56,000,000	11
165	Marine Home Center* Nantucket, Mass.	56,000,000	1
166	Prince Lumber* New York, N.Y.	56,000,000	3
167	Alamo Lumber* San Antonio, Texas	55,500,000	13
168	Snyder Diamond* Santa Monica, Calif.	54,500,000	3
169	Window Depot Tucson, Ariz.	54,000,000	7
170	Haynes Brothers Lumber* Murfreesboro, Tenn.	54,000,000	2
171	ISC Building Materials* Dallas, Texas	53,500,000	4
172	Hardware Hawaii* Kailua, Hawaii	53,000,000	4
173	The Lyon & Billard Lumber Co.* Meriden, Conn.	53,000,000	4
174	Cape Cod Lumber Abington, Mass.	52,000,000	1
175	Sunrise Builders Supply Horn Lake, Miss.	52,000,000	2

Rank	Company Location of Headquarters	2021 \$ Sales	Units
176	East Hardwood Beaufort, N.C.	52,000,000	5
177	Hingham Lumber Cohasset, Mass.	52,000,000	1
178	Huskey Building Supply Franklin, Tenn.	50,000,000	4
179	Haven Building Products* Winter Haven, Fla.	49,000,000	1
180	Channel Lumber* Richmond, Calif.	49,000,000	1
181	Uresco Construction Materials* Kent, Wash.	48,500,000	3
182	Crenshaw Lumber* Gardena, Calif.	47,000,000	4
183	Champion Lumber* Riverside, Calif.	46,000,000	1
184	Douglas Lumber Kitchens & Home Center Smithfield, R.I.	46,000,000	1
185	Truitt & White Lumber* Berkeley, Calif.	46,000,000	2
186	Hughes Lumber* Catoosa, Okla.	49,000,000	7
187	Preston Feather Buiding Centers* Petoskey, Mich.	48,000,000	4
188	Ritter Lumber* Nederland, Texas	45,000,000	4
189	Eastern Pennsylvania Supply Co.* Wilkes Barre, Pa.	45,000,000	8
190	Len-Co Lumber Company* Buffalo, N.Y.	45,000,000	3
191	Parks Building Supply & Interiors Fayetteville, N.C.	46,000,000	1
192	Peter Lumber* Pleasantville, N.J.	44,000,000	7
193	Herrman Lumber* Springfield, Mo.	42,500,000	5
194	Outdoor Living Supply Rochester, Minn.	42,000,000	13
195	Moore Lumber & Hardware Pine, Colo.	42,000,000	6
196	Clay Ingels* Lexington, Ky.	42,000,000	1
197	Botello Lumber* Mashpee, Mass.	42,000,000	1
198	Lumber Investors* Alexandria, La.	41,000,000	4
199	Montalbano Lumber* Houston, Texas	40,000,000	2
200	Brown Lumber Columbiana, Ala.	35,000,000	1

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