

THE TOP 200 RISE AGAIN

By **HBSDealer Staff**

Combined sales at the nation's Top 200 building material dealers — from ABC Supply in the No. 1 spot to Hartje Lumber ranking 200 — continued to rise with residential construction and the recovering U.S. economy.

Companies on the *HBSDealer* Top 200 Scoreboard, sponsored by Boise Cascade, showed estimated collective sales of \$51,372,670,000, up 9.1% from \$47,098,400,000 in the previous year.

Acquisition-oriented Kodiak Building Partners showed the biggest year-over-year percent gain — tallying an increase of 150%. But in terms of dollars, US LBM Holdings' \$601 million year-over-year increase leads the field. The Green Bay, Wisconsin-based collection of lumberyard companies grew 73.7%, jumping six places from 15 to 9.

The 2015 list — which reports data from activity in 2014 — was prepared against a backdrop of growing industry consolidation. Two massive deals are on the docket — Builder FirstSource's acquisition of ProBuild Holdings, and the merger of BMC and Stock

Building Supply. The two moves combine companies ranked 2nd and 7th, and 11th and 12th, respectively.

Executives involved in the mergers say the timing is right for bold moves.

"We believe the combined company will also be poised to better capitalize on the improving U.S. housing market, which is generating increased demand for building materials services and solutions," said Jeff Rea, CEO of Stock Building Supply, explaining the BMC-Stock deal to investors.

"We feel the timing of the transaction is ideal," said Chad Crow, president and CFO of Dallas-based Builders FirstSource.

In July, the latest monthly figures available, starts were at a seasonally adjusted annual rate of 1.206 million — an eight-year high.

Rising starts not only fuel optimism, they are a source of fuel for more mergers and acquisitions.

US LBM shows no signs of slowing down its acquisition spree. Moreover, US LBM CEO LT Gibson said he expects

the pace of change in the LBM industry to increase. "Those focused on the right things will succeed regardless of model or size."

Referring to the competition between the national powerhouses and the local independents, Gibson offered the following advice:

"There are advantages to both models, the independents versus national companies," he said. "As long as you understand your strengths and are the best in your local market, you have a future."

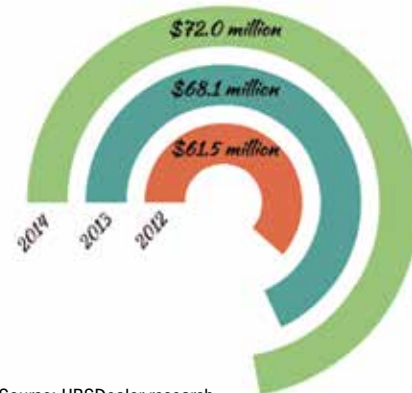
For the full Top 200 list, visit the "Research" section of hbsdealer.com.

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Top 200 Median Sales



Source: HBSDealer research

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PRO DEALER SCOREBOARD: 1-32

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Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014	Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
1	1	ABC Supply* Beloit, Wis.	5,258.0	490	7685	17	16	McCoy's Building Supply San Marcos, Texas	699.0	88	2120
2	2	ProBuild Holdings* Denver	4,430.0	364	10000	18	18	MarJam Supply Brooklyn, N.Y.	439.5	38	800
3	3	Fastenal* Winona, Minn.	3,733.5	2637	18417	19	20	Harvey Building Products Waltham, Mass.	405.0	35	1370
4	4	Beacon Roofing Supply Herndon, Va.	2,326.9	271	3005	20	42	Kodiak Building Partners Denver	395.0	20	800
5	6	84 Lumber Eighty Four, Pa.	2,319.0	257	4295	21	22	Golden State Petaluma, Calif.	339.0	6	325
6	5	Allied Building Products East Rutherford, N.J.	2,242.0	185	3350	22	21	Parr Lumber Hillsboro, Ore.	324.8	31	640
7	7	Builders FirstSource Dallas	1,604.0	111	3800	23	28	Ganahl Lumber Co Anaheim, Calif.	291.0	10	730
8	8	HD Supply (Const. & Indus.)* Atlanta	1,481.0	650	15000	24	26	National Lumber Co. Mansfield, Mass.	279.5	8	570
9	15	US LBM Holdings* Green Bay, Wis.	1,416.0	97	3560	25	32	Matheus Lumber Woodinville, Wash.	279.0	7	95
10	9	L&W Supply Chicago	1,345.0	145	2175	26	27	Meek's Lumber and Hardware Sacramento, Calif./Springfield, Mo.	268.0	55	940
11	8	BMC* Atlanta	1,449.0	88	5100	27	23	Shelter Products Portland, Ore.	260.0	5	93
12	10	Stock Building Supply* Raleigh, N.C.	1,313.0	68	3025	28	25	Riverhead Building Supply Calverton, N.Y.	260.0	13	481
13	14	SRS Distribution McKinney, Texas	1,208.0	125	1580	29	24	E.C. Barton Jonesboro, Ark.	254.0	110	670
14	18	Sutherland Lumber Kansas City, Mo.	1,040.0	52	1850	30	30	Mead Lumber Columbus, Neb.	254.0	38	850
15	12	Roofing Supply Group Dallas	1,012.5	75	1185	31	29	Foxworth-Galbraith Lumber Dallas	243.5	25	605
16	13	Carter Lumber Kent, Ohio	979.2	141	2850	32	33	R.P. Lumber Edwardsville, Ill.	217.0	55	600

*See notes on page 24



1 COMPLETE PRODUCT LINE



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2 NATIONWIDE DISTRIBUTION



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PRO DEALER SCOREBOARD: 33-64

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Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014	Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
33	37	Raymond Building Supply Fort Myers, Fla.	214.0	5	220	49	50	T.W. Perry Enterprises Gaithersburg, Md.	146.3	7	400
34	38	Idaho Pacific Lumber Boise, Idaho	203.5	12	115	50	66	Rosen Materials* Sunrise, Fla.	143.0	19	260
35	39	Ring's End* Darien, Conn.	201.2	7	490	51	48	Honsador Lumber Kapolei, Hawaii	142.8	16	285
36	41	Alpine Lumber Westerville, Colo.	198.0	24	400	52	51	Hammond Lumber Belgrade, Maine	139.0	13	465
37	34	Lampert Yards Inc.* St. Paul, Minn.	192.0	34	435	53	58	VNS Corp. Vidalia, Georgia	134.2	13	280
38	35	Erie Materials Syracuse, N.Y.	179.9	10	340	54	52	Professional Builders Supply Morrisville, N.C.	134.0	6	175
39	36	Curtis Lumber Ballston Spa, N.Y.	172.0	21	500	55	NA	Reliable Wholesale Lumber Huntington Beach, Calif.	131.0	2	128
40	40	Stine Home & Yard Sulphur, La.	167.0	12	645	56	56	Burton Lumber Salt Lake City	129.0	7	370
41	44	Samuel Feldman Lumber Brooklyn, N.Y.	165.0	4	180	57	53	Hancock Lumber Co. Casco, Maine	125.6	13	405
42	45	Contract Lumber Pataskala, Ohio	163.0	8	245	58	59	Graber Post Buildings Inc. Montgomery, Ind.	125.0	1	220
43	43	Ridout Lumber Company Searcy, Ark.	159.0	14	336	59	62	CNRG Natchez, Miss.	125.0	48	850
44	46	Alexander Lumber Aurora, Ill.	156.0	22	400	60	73	Gilcrest-Jewett Waukee, Iowa	121.0	4	255
45	47	Capitol Building Supply Manassas, Va.	155.5	12	270	61	54	Scherer Brothers Brooklyn Park, Minn.	118.0	5	250
46	67	Forge Lumber/Sims Lohman Cincinnati	153.0	14	510	62	NA	Kenseal Construction Products Baltimore	116.0	12	130
47	64	Valu Home Centers Buffalo, N.Y.	148.0	41	600	63	61	Westside Building Materials Anaheim, Calif.	115.2	10	250
48	49	Kuiken Brothers Fair Lawn, N.J.	146.8	8	270	64	NA	Builders Supply Omaha, Neb.	115.0	1	240

*See notes on page 24



3 TOOLS AND GUIDANCE



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4 EASY TO DO BUSINESS WITH



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PRO DEALER SCOREBOARD: 65-112

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Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
65	55	Lezzer Lumber Curwensville, Pa.	112.0	11	400
66	73	The Building Center Pineville, N.C.	112.0	6	265
67	68	Friedman's Home Improvement Santa Rosa, Calif.	111.9	4	390
68	63	Spahn & Rose Dubuque, Iowa	111.0	26	270
69	69	Bloedorn Lumber Torrington, Wyo.	110.0	22	280
70	70	Sunroc Corp. Saint George, Utah	110.0	11	270
71	64	Star Lumber Wichita, Kan.	107.0	7	320
72	65	Franklin Building Supply Boise, Idaho	105.0	16	370
73	85	McCray Lumber & Millwork Overland Park, Kan.	105.0	6	210
74	72	Keim Lumber Charm, Ohio	104.0	1	400
75	80	Drexel Building Supply Campellsport, Wis.	103.0	6	205
76	75	Hayward Lumber Monterey, Calif.	101.0	8	204
77	93	Central Valley Builders Supply Napa, Calif.	100.0	5	200
78	76	Woodhaven Lumber & Millwork Lakewood, N.J.	99.0	3	200
79	77	Hawaii Planing Mill Keaau, Hawaii	99.0	7	215
80	78	Guy C. Lee Building Materials Smithfield, N.C.	98.0	8	165
81	79	Marvin's Building Materials and Home Centers Leeds, Ala.	98.0	28	685
82	81	LaValley/Middleton Building Supply Newport, N.H.	92.0	12	350
83	82	Jerry's Home Improvement Eugene, Ore.	92.0	2	500
84	83	M.G. Building Materials San Antonio	91.0	5	325
85	84	Florence Corp. Huntington, N.Y.	90.7	5	150
86	86	Big C Lumber Granger, Ind.	90.0	18	270
87	87	Williams Lumber & Home Centers Rhinebeck, N.Y.	87.0	8	260
88	137	Consolidated Lumber Stillwater, Minn.	86.0	14	170

Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
89	88	Buchheit Perryville, Mo.	82.0	8	165
90	90	Dunn Lumber Seattle	80.0	9	225
91	96	Robert Bowden Marietta, Ga.	78.0	3	265
92	91	Higginbotham Brothers Comanche, Texas	78.0	37	310
93	89	Your Building Centers Altoona, Pa.	77.0	13	280
94	92	O.C. Cluss Lumber Uniontown, Pa.	76.0	9	215
95	94	Millard Lumber Omaha, Neb.	75.0	3	280
96	95	Zeeland Lumber & Supply Zeeland, Mich.	74.0	6	255
97	98	Builders Kearney, Neb.	74.0	5	255
98	97	Jaeger Lumber Union, N.J.	72.5	7	150
99	100	Ellsworth Builders Supply Ellsworth, Maine	72.0	10	250
100	113	Zarsky Lumber* Victoria, Texas	72.0	12	190
101	99	City Mill Co. Honolulu	71.5	8	410
102	101	Doug Ashy Building Materials Lafayette, La.	70.0	7	300
103	102	Jackson Lumber & Millwork Lawrence, Mass.	69.5	4	160
104	103	Viking Lumber Belfast, Maine	69.0	9	198
105	109	Mans Lumber & Millwork Trenton, Mich.	67.0	2	117
106	117	Koopman Lumber Whitinsville, Mass.	67.0	7	170
107	105	Belair Road Supply Baltimore	66.0	5	83
108	106	Cape Cod Lumber Abington, Mass.	65.4	1	90
109	107	Builder's Discount Centers Rocky Mount, N.C.	65.0	11	140
110	108	Bailey Lumber & Supply Gulfport, Miss.	64.0	8	285
111	122	Arlington Coal & Lumber Arlington, Mass.	63.0	5	100
112	110	T.H. Rogers Lumber Edmond, Okla.	62,300,000	34	240

PRO DEALER SCOREBOARD: 113-162

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Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
113	111	Moynihan Lumber North Reading, Mass.	62.0	3	130
114	128	Big Creek Lumber Davenport, Calif.	62.0	5	200
116	112	Ed Herrington Hillsdale, N.Y.	61.0	5	156
117	114	Nickerson Lumber South Dennis, Mass.	60.0	5	150
118	115	Mill Creek Lumber Tulsa, Okla.	60.0	16	400
119	151	Building Solutions Tulsa, Okla.	60.0	3	100
120	119	Russell Do it Centers Alexander City, Ala.	60.0	9	190
121	116	Ziegler Lumber Spokane, Wash.	59.0	6	225
122	130	Western Building Center Kalispell, Mont.	58.5	12	200
123	119	K-1 Lumber & Building Fixtures Louisville, Ky.	57.0	6	250
124	121	United Builder's Supply Westerly, R.I.	57.0	4	150
125	122	Belletetes Jaffrey, N.H.	57.0	7	225
126	169	Tibbetts Lumber St. Petersburg, Fla.	57.0	6	220
127	123	Shelly Enterprises Telford, Pa.	56.0	6	185
128	126	Builders' General Supply Little Silver, N.J.	55.0	4	120
129	127	Humphrey's Building Supply Center Tiverton, R.I.	55.0	5	50
130	150	Guthrie Lumber Lavonia, Mich.	55.0	1	80
131	125	The Lester Group Martinsville, Va.	54.0	3	100
132	129	Niehaus Lumber Vincennes, Ind.	54.0	4	160
133	132	Cassity Jones Lumber Longview, Texas	54.0	20	156
134	131	Marine Home Center Nantucket, Mass.	53.0	3	126
135	133	John H. Myers & Son York, Pa.	52.0	6	145
136	140	Ashby Lumber Berkeley, Calif.	52.0	2	125
137	134	Barr Lumber San Bernando, Calif.	51.0	4	85

Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
138	155	Christensen Lumber Fremont, Neb.	51.0	2	180
139	135	The Lyon & Billard Lumber Co. Meriden, Conn.	50.9	6	120
140	138	Beisser Lumber Grimes, Iowa	50.0	3	130
141	142	DuBell Lumber Medford, N.J.	50.0	6	150
142	137	Bender Lumber Bloomington, Ind.	50.0	8	75
143	139	Dolan Lumber Benicia, Calif.	50.0	4	92
144	141	Rio Grande Building Materials Denver	49.0	4	190
145	143	Sterling Lumber & Investment Westminster, Colo.	48.0	11	165
146	144	GBS Building Supply Greenville, S.C.	48.0	5	110
148	146	Arnold Lumber West Kingston, R.I.	47.6	4	115
149	145	Garris Evans Lumber Greenville, N.C.	47.5	6	125
150	149	Alamo Lumber Company San Antonio	47.5	13	150
151	147	Concord Lumber Littleton, Mass.	47.0	4	125
152	148	The Forest Group Oklahoma City	47.0	3	135
153	153	Champion Lumber Riverside, Calif.	46.0	1	45
154	154	Dykes Lumber Weehawken, N.J.	46.0	10	165
155	NA	Home Hardware Center Natchez, Miss.	45.9	21	220
156	156	Standard Supply and Lumber Grand Rapids, Mich.	45.2	6	100
157	NA	Zuern Building Products Allentown, Wis.	45.0	4	95
158	157	Snyder Diamond Santa Monica, Calif.	45.0	3	85
159	159	Hughes Lumber Catoosa, Okla.	44.0	7	85
160	160	Preston Feather Buiding Centers Petoskey, Mich.	43.6	4	100
161	152	Louis J. Grasmick Lumber Baltimore	43.0	1	58
162	166	Warner Robins Supply Warner Robins, Ga.	43.0	8	160

PRO DEALER SCOREBOARD: 163-200

Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
163	183	Texas Plywood & Lumber Co. Grand Prairie, Texas	42.6	1	140
164	161	The Builder's Choice Plymouth, Minn.	42.05	5	170
165	162	Kleet Lumber Huntington, N.Y.	42.0	1	75
166	164	Potter's Ace Home Center Jamestown, Tenn.	42.0	20	225
167	163	HEP Sales Waterloo, N.Y.	41.5	16	190
168	165	Wholesale Builders Supply Carnegie, Pa.	41.0	5	90
169	167	Busy Beaver Building Centers Pittsburgh	41.0	15	350
170	171	Montalbano Lumber Houston	40.06	2	85
171	NA	Oldham Lumber Dallas	40.0	1	38
172	172	Maner Builders Supply Augusta, Ga.	40.0	3	130
173	169	Bay City Plywood Tampa, Fla.	40.0	5	40
174	170	Hardware Hawaii Kailua, Hawaii	40.0	4	190
175	173	Huskey Building Supply Franklin, Tenn.	39.6	3	125
176	174	ISC Building Materials Dallas	39.5	5	80
177	177	Botello Lumber Mashpee, Mass.	39.5	1	90
178	175	Eastern Pennsylvania Lumber Wilkes Barre, Pa.	39.0	9	120
179	176	Lumber Investors Alexandria, La.	39.0	2	90
180	178	Riggs Supply Kennett, Mo.	39.0	3	50
181	179	Gordon Lumber Fremont, Ohio	38.0	8	110

Rank 2015	Rank 2014	Company	Sales (\$ mil.) 2014	Units 2014	Employees 2014
182	180	Channel Lumber Richmond, Calif.	38.0	1	50
183	182	Hacienda Home Centers Albuquerque, N.M.	38.0	4	125
184	NA	Timberland Lumber Brazil, Ind.	37.5	3	130
185	NA	2nds in Building Materials Chattanooga, Tenn.	37.0	9	205
186	181	A.C. Houston Lumber Las Vegas	36.0	3	100
187	184	Clay Ingels Lexington, Ky.	36.0	2	100
188	185	W.E. Shone Lumber Stanton, Del.	36.0	3	90
189	187	Nisbet Brower Cincinnati	35.6	2	100
190	188	Herrman Lumber Springfield, Mo.	35.5	5	120
191	NA	Walpole Woodworkers Walpole, Mass.	35.5	12	250
192	189	Haynes Brothers Lumber Murfreesboro, Tenn.	35.05	2	60
193	NA	Wheelwright Lumber Company Ogden, Utah	35.0	1	55
194	190	City Lumber New York, N.Y.	35.0	2	45
195	191	Mason's Mill & Lumber Houston	35.0	1	40
196	192	Douglas Lumber Kitchens & Home Center Smithfield, R.I.	35.0	1	74
197	193	Tulnoy Lumber Bronx, N.Y.	35.0	3	72
198	194	Truitt & White Lumber Berkeley, Calif.	35.0	3	60
199	196	G.V. Moore Lumber Ayer, Mass.	35.0	2	40
200	197	Hartje Lumber La Valle, Wis.	35.0	1	55

NOTES

- 1. ABC Supply:** Describes itself as the "largest wholesale distributor of roofing in the United States."
- 2. ProBuild Holdings:** Acquired by Builders FirstSource in August 2015, creating the largest LBM company with combined sales in excess of \$6 billion.
- 3. Fastenal:** A growing number of sales comes from a fleet of 50,000-plus industrial vending machines.
- 8. HD Supply:** Total company 2014 sales were \$8.88 billion.
- 9. US LBM:** In July, private equity firm Kelso & Co. agreed to purchase a

- majority of the equity interests in the company — estimated price tag: \$1 billion.
- 11, 12. BMC and Stock:** Expected to merge in the second half of 2015, creating a \$2.7 billion LBM distributor.
 - 35. Ring's End:** In addition to 7 lumberyards, Ring's End operates 15 paint/design centers, 8 millwork showrooms and 8 kitchen & bath showrooms.
 - 37. Lampert Yards:** Acquired by US LBM in 2015.
 - 50. Rosen Materials:** Acquired by US LBM in 2015.
 - 100. Zarsky Lumber:** Recently acquired by Kodiak Building Partners (No. 20).