

JOHANNESBURG OFFICE

BALLYOAKS OFFICE PARK, BUILDING B, 35 BALLYCLARE DRIVE, BRYANSTON EXT 7
P O BOX 3044, RANDBURG, 2125
TEL: +27 11 513 -1450 FAX: +27 11 463-2771

PORT ELIZABETH OFFICE

57 FIFE AVENUE, ROWALLAN PARK, PORT ELIZABETH, 6025
P O BOX 505, HUNTERS RETREAT, 6017
TEL: +27 41 371-5298 FAX: +27 41 371-5151

WEBSITE: WWW.WHOOWNSWHOM.CO.ZA
REG No: 1986/003014/07



Essential Business Information

RESEARCH REPORT

on

Retail Trade in Hardware, Paint and Glass

SICCODE: 6234

Report Date: September 2010

Compiled By:
Amanda van der Westhuizen
research@whoownswhom.co.za

Report Index

INTRODUCTION	4
DESCRIPTION OF THE INDUSTRY	4
➤ Industry Supply Chain	5
SIZE OF INDUSTRY	7
STATE OF THE INDUSTRY	10
➤ Local	10
Corporate Actions	12
Regulations	13
Black Economic Empowerment	14
➤ Regional	15
➤ International	16
INFLUENCING FACTORS	16
➤ Economic Environment.....	16
➤ Information Technology.....	17
➤ Labour Resources.....	17
➤ Cyclicity	17
ENVIRONMENTAL CONCERNS	17
COMPETITION	18
➤ Barriers to Entry.....	20
➤ Research and Development and Innovation	21
SWOT ANALYSIS	21
FUTURE OUTLOOK	22
INDUSTRY ASSOCIATIONS	22
REFERENCES	23
➤ Publications.....	23
➤ Websites.....	24
ORGANOGRAM 6234A	26
➤ Aggregates, Bricks, Concrete & Other Products.....	26

Companies Profiled

African Brick Centre Ltd	28
Afrimat Ltd	30
Afrisam (South Africa) (Pty) Ltd.....	33
Brikor Ltd	35
Corobrik (Pty) Ltd.....	37
Everite (Pty) Ltd	39
Infrasat (Div Of Aveng (Africa) Ltd).....	41
Lafarge Industries South Africa (Pty) Ltd.....	43
Murray & Roberts Buildings Products (Pty) Ltd	45
NPC-Cimpor (Pty) Ltd.....	47
Rocla (Pty) Ltd.....	52
WG Wearne Ltd.....	54
ORGANOGRAM 6234B	56
➤ Glass.....	56

Companies Profiled

PG Group (Pty) Ltd.....	57
-------------------------	----

ORGANOGRAM 6234C	59
➤ Paints, Varnishes & Lacquers	59
<u>Companies Profiled</u>	
Chemspec House Of Paint (Pty) Ltd	60
Chemspec Paint And Abrasive (Pty) Ltd	61
Freeworld Coatings Ltd	62
ICI Dulux (Pty) Ltd.....	65
Prominent Paints (Pty) Ltd.....	67
ORGANOGRAM 6234D	69
➤ Steel Products.....	69
<u>Companies Profiled</u>	
Allens Meshco (Pty) Ltd.....	70
BRC Mesh Reinforcing (Div Of Murray & Roberts Steel (Pty) Ltd)	71
Capital Africa Steel (Pty) Ltd	73
KMG Steel Service Centres (Pty) Ltd.....	75
Macsteel Service Centres SA (Pty) Ltd.....	77
Mazor Group Ltd	79
Steeledale (Div Of Aveng (Africa) Ltd)	81
ORGANOGRAM 6234E.....	83
➤ General Building Products	83
<u>Companies Profiled</u>	
Build It (Div Of The Spar Group Ltd)	84
Buildmax Ltd	86
Cashbuild Ltd.....	88
Distribution & Warehousing Network Ltd.....	90
DIY Depot (Pty) Ltd	92
Iliad Africa Ltd	93
Massbuild (Pty) Ltd	96
Steinhoff Doors And Building Materials (Pty) Ltd.....	98
ORGANOGRAM 6234F	100
➤ Tiles	100
<u>Companies Profiled</u>	
Italtile Ltd	101
Tile Africa (Div Of Norcross (SA) (Pty) Ltd).....	103