

Penman Strategic Competitor Report – Specific Market Share Analysis

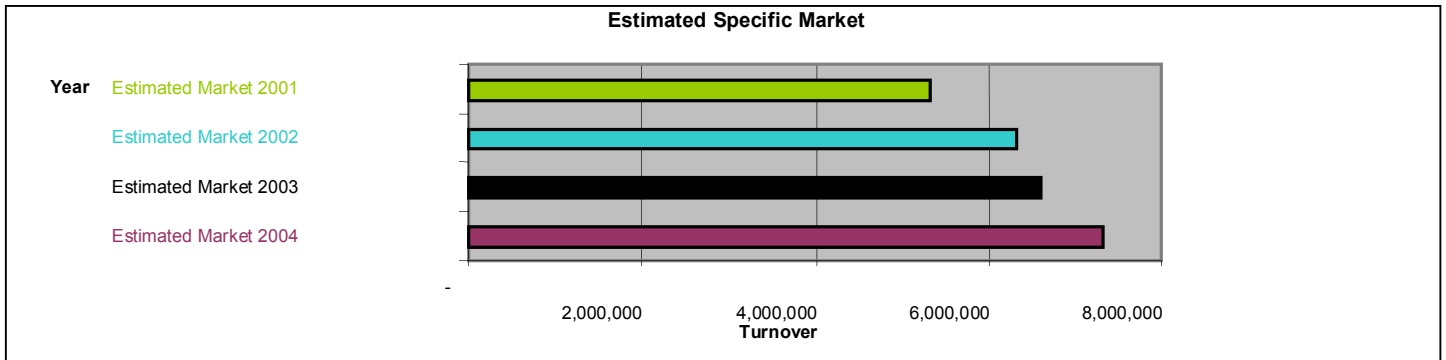
Estimated Specific Market Size

The total Turnover for the five selected companies is estimated at **£7,339,000 in 2004**.

This is based on two estimated turnover figures and one stated turnover figure.

The **ESM** size by turnover from 2001 to 2004 has risen from £5.3 Million to £7.3 Million or 37.7% with the largest single year's growth being 2002 where the **ESM** increased by £1,008,000 or 18.91 %.

2003-2004	Market Growth	Turnover	Growth Actual	Growth %	Rate
2004	Estimated Market 2004	7,339,000	716,000	9.25%	4.77
2003	Estimated Market 2003	6,623,000	284,000	4.48%	- 14.43
2002	Estimated Market 2002	6,339,000	1,008,000	18.91%	18.91
2001	Estimated Market 2001	5,331,000	-	-	-



Current Market Leader

Based on the **ESM** and as can be seen from table 1.0 below, your company has secured 32.7% of the ESM for 2004, some 7.4% up on your nearest rival (in terms of size) Dynamite Fraser Limited however and as will be detailed in the next section enjoyed substantial growth in 2001 – 2002, that growth slowed significantly in 2002 – 2003 and the company Turnover between 2003 and 2004 actually fell by £1,000.

Largest Threat

Multi Distriction Limited increased its turnover in 2003/2004 by over 40% and if this was sustained in 2004/2005 they would be in a position to close the Gap significantly. The figures for Multi Distriction Limited however pointed to a 30% fall in turnover in 2002/2003 so it is difficult to predict and filing abbreviated accounts makes it difficult to identify exactly, the reasons behind such major swings in turnover. Please examine the full information on this company in appendix 2.

2004	Company	Period (Months)	Year Ending	Turnover	Share	Size Ranking	
Client	Your Co	12	31/10/2004	2,400,000	32.7%	1	
	Dynamite Fraser Limited	12	31/12/2004	1,860,000	25.3%	2	
	"Threat on Growth"	Multi Distriction Limited	12	31/10/2004	1,524,000	20.8%	3
		Griffin of Wellsmere Limited	12	31/12/2004	1,190,000	16.2%	4
		Liverty Distribution Limited	12	30/04/2004	365,000	5.0%	5
2003	Company	Period (Months)	Year Ending	Turnover	Share	Size Ranking	
Client	Your Co	12	31/10/2003	2,232,000	33.7%	1	
	Dynamite Fraser Limited	12	31/12/2003	1,861,000	28.1%	2	
"Threat on Growth"	Multi Distriction Limited	12	31/10/2003	1,075,000	16.2%	4	
	Griffin of Wellsmere Limited	12	31/12/2003	1,275,000	19.3%	3	
	Liverty Distribution Limited	12	30/04/2003	180,000	2.7%	5	

Your Co has reduced its share of the ESM whilst two of your competitors have increased their share of the ESM.