

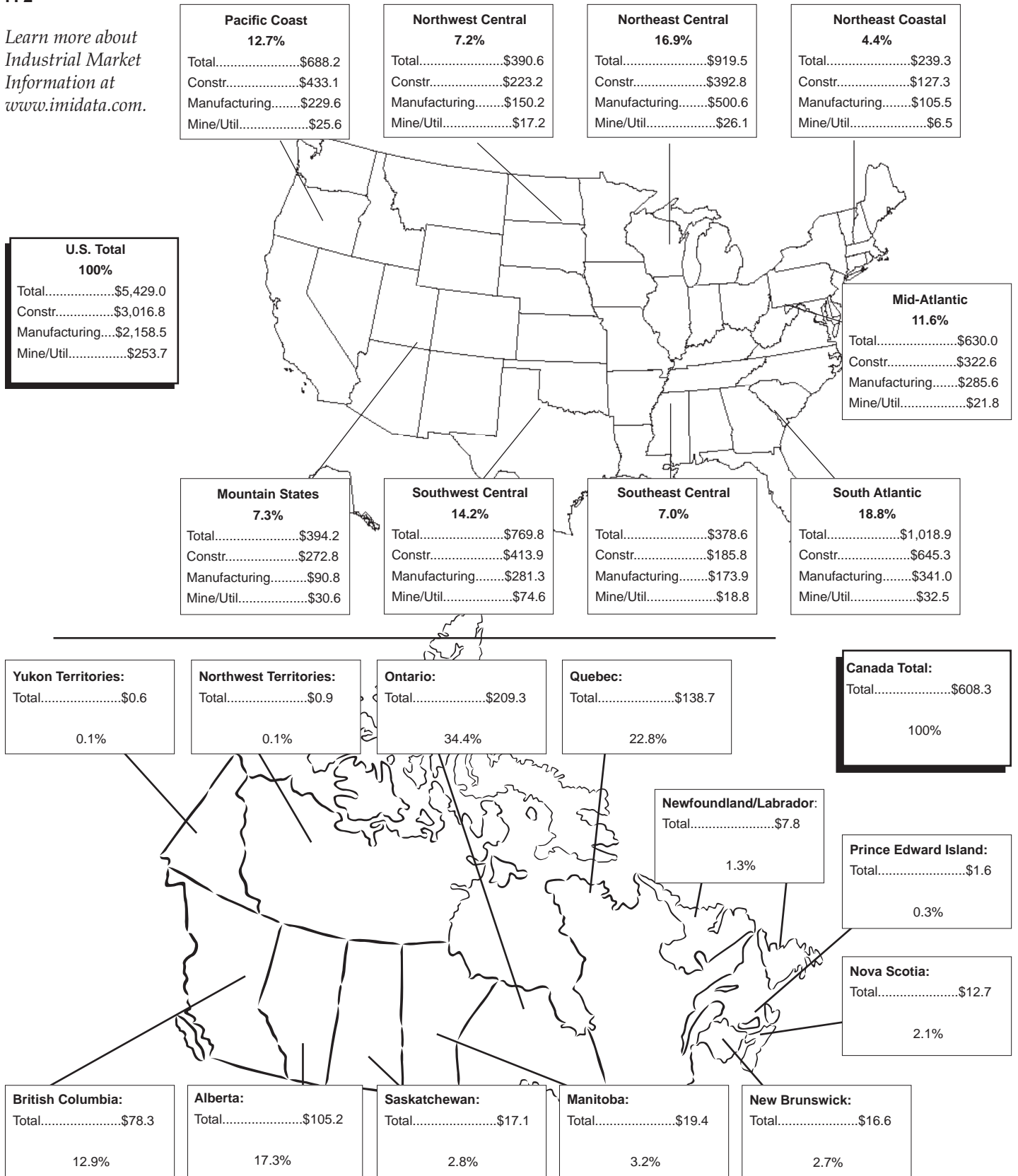
**MARKETS
UPDATE
SUPPLEMENT
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MARKET ANALYSIS: Safety Product (PPE) Consumption in U.S. & Canada

Consumption of Safety Products (PPE) in the U.S. was \$5.42 billion in 2010. Consumption in Canada was \$608.3 million in 2010, according to data from Industrial Market Information.

End-user consumption of Safety Products by region, in millions of \$ (2010 estimates).



■ U.S. End-User Consumption of Safety Products (PPE) by Industry: Top 10

Manufacturing

Top 10 industries in \$ volume, by SIC code, consuming Safety (PPE) Products (2010 estimates)

SIC Code	Manufacturing Safety (in \$millions)	Company Count
3312 Steel Works, Blast Furnaces, Rolling Mills	120.8	3,513
2821 Plastics Materials, Syn. Resins, Nonvul. Elastomers	93.4	1,787
2869 Industrial Organic Chemicals, NEC	88.3	2,043
2911 Petroleum Refining	84.4	1,771
2621 Paper Mills	82.2	2,200
2819 Industrial Inorganic Chemicals, NEC	74.1	1,624
2834 Pharmaceutical Preparations	70.2	3,887
3321 Gray & Ductile Iron Foundries	38.5	469
2631 Paperboard Mills	36.7	654
2015 Poultry Slaughtering & Processing	35.4	741

Construction

Top industries in \$ volume, by SIC, consuming Safety (PPE) Products (2010 estimates)

SIC Code	Construction Safety (in \$millions)	Company Count
1542 Gen. Contractors - Nonresidential	390.1	52,263
1611 Highway & Street Construction	356.7	26,053
1771 Concrete Work	344.3	43,285
1623 Water, Sewer, Pipeline, Comm. Construction	284.1	12,302
1629 Heavy Construction	239.0	17,032
1711 Plumbing, Heating & Airconditioning	221.6	174,678
1731 Electrical Work	205.2	118,229
1521 Gen. Contractors - Single Family Housing	155.8	420,658
1794 Excavation Work	130.2	42,486
1541 Gen. Contractors - Industrial Bldgs/Warehouses	121.3	12,898

Utilities & Mining

Top industries in \$ volume, by SIC, consuming Safety (PPE) Products (2010 estimates)

SIC Code	Utilities & Mining Safety (in \$millions)	Company Count
4911 Electric Services	57.9	8,239
1389 Oil & Gas Field Services	37.7	11,391
4953 Refuse Systems	33.7	20,978
1381 Drilling Oil & Gas Wells	20.7	2,646
1311 Crude Petroleum & Natural Gas	18.9	6,233
4941 Water Supply	13.1	9,616
1221 Bituminous Coal & Lignite Surface Mining	12.4	530
1382 Oil & Gas Field Exploration Services	6.7	5,605
1222 Bituminous Coal Underground Mining	6.7	193
4952 Sewerage Systems	5.1	2,062

■ End-User Consumption of Safety Products (PPE) in Canada by Industry

Top 10 Industries Overall

In \$ volume, by SIC, consuming Safety (PPE) Products (2010 estimates)

SIC CODE	Companies	Total Volume in \$millions
1623 Water, Sewer, Pipeline, Comm/Power Construction	1,383	32.6
1611 Highway & Street Construction	2,448	30.3
1629 Heavy Construction	1,750	25.0
1542 Gen. Contractors - Nonresidential Construction	3,900	22.4
3312 Blast Furnaces & Steel Mills	535	21.0
2621 Paper Mills	218	17.8
1771 Concrete Work	2,206	17.2
2911 Petroleum Refining	294	17.2
1711 Plumbing, Heating & Airconditioning	11,974	16.9
1731 Electrical Work	9,609	16.6



MDM News Digest

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ning more hiring and capital expenditures this year. Seve about the manufacturing economy (up fercent in 2010).

New orders for manufactured durable goods in February decreased \$1.9 billion or 0.9 percent to \$200 billion, the U.S. Census Bureau announced in an advance report. This decrease, down four of the last five months, followed a 3.6 percent January increase.

Manufacturer News

Gibraltar Industries, Inc., Buffalo, NY, a manufacturer and distributor of products for building and industrial markets, has acquired The D.S.

Brown Company, an Ohio-based manufacturer of expansion joints, structural bearings and pavement sealants for bridges, highways and other infrastructure projects, from Altus Capital Partners, Inc.

Worthington Industries, Inc., Columbus, OH, reported sales of \$569.4 million for the third quarter ended Feb. 28, 2011, an increase of 26.2 percent over the same period a year ago. Profit was \$26.3 million, compared to a year-ago loss of \$17.7 million. For the first nine months of fiscal 2011, sales were \$1.77 billion, up 34.1 percent in a year-over-year comparison. Profit was \$62 million, compared a year-ago loss of \$20.6 million.

Brady Corp., Milwaukee, WI, a manufacturer of identification solutions, has named Stephen Millar as President - Brady Asia-Pacific, effective April 1, 2011. Millar will be responsible for the growth and development of all Brady business across the Asia-Pacific region, with operations in Australia, China, Japan, Korea, Taiwan, Hong Kong, Malaysia, Thailand, Singapore, India and the Philippines.

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