



# Marshall's

*Creating Better Spaces*

## Tom Poole – MD Operations



## Operations - Scale and Capability





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## **Scale & Capability**

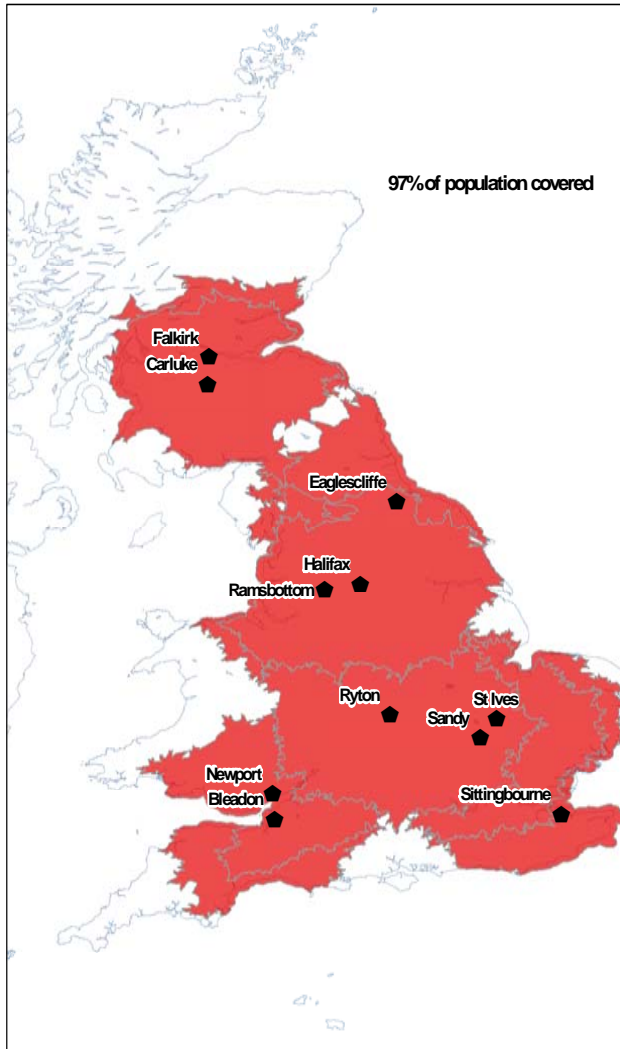
- 13 UK manufacturing sites with capacity to meet medium term market demand.
- Focus on New Product Development opportunities through innovation and capability.
- Significant control over service through own crane haulage fleet
- Opportunities to exploit further opportunities in minerals and mortars



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## Unrivalled geographical coverage



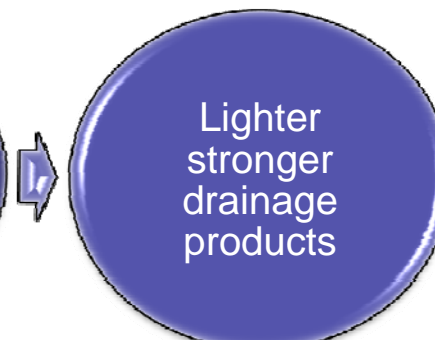
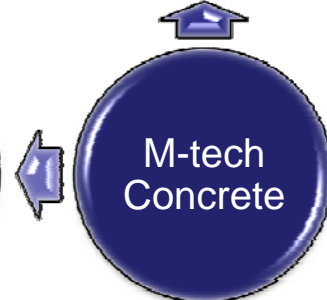
- Extensive national manufacturing footprint
- 97% of population within 2 hour drive time from a manufacturing facility
- Haulage out-bases utilised to provide efficient use of crane haulage



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## Innovation to develop New Product Development



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A developing technology like M-tech can deliver multiple opportunities





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## Logistics Assets & Competency



Largest crane fleet in the UK  
operating at 44 tonnes

147 vehicles in total with payloads  
of 26-27 tonnes

2/3<sup>rd</sup> Long bed articulated

1/3<sup>rd</sup> Draw bar type

Drawbar type provides  
flexibility for site access





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## Logistics Assets & Competency



Shortage of vehicles and drivers is an industry constraint

Fleet being expanded to take further control of our service proposition





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## Logistics Assets



Marshalls own crane fleet vehicles provides us with a unique capability as the industry attempts to flex to demand





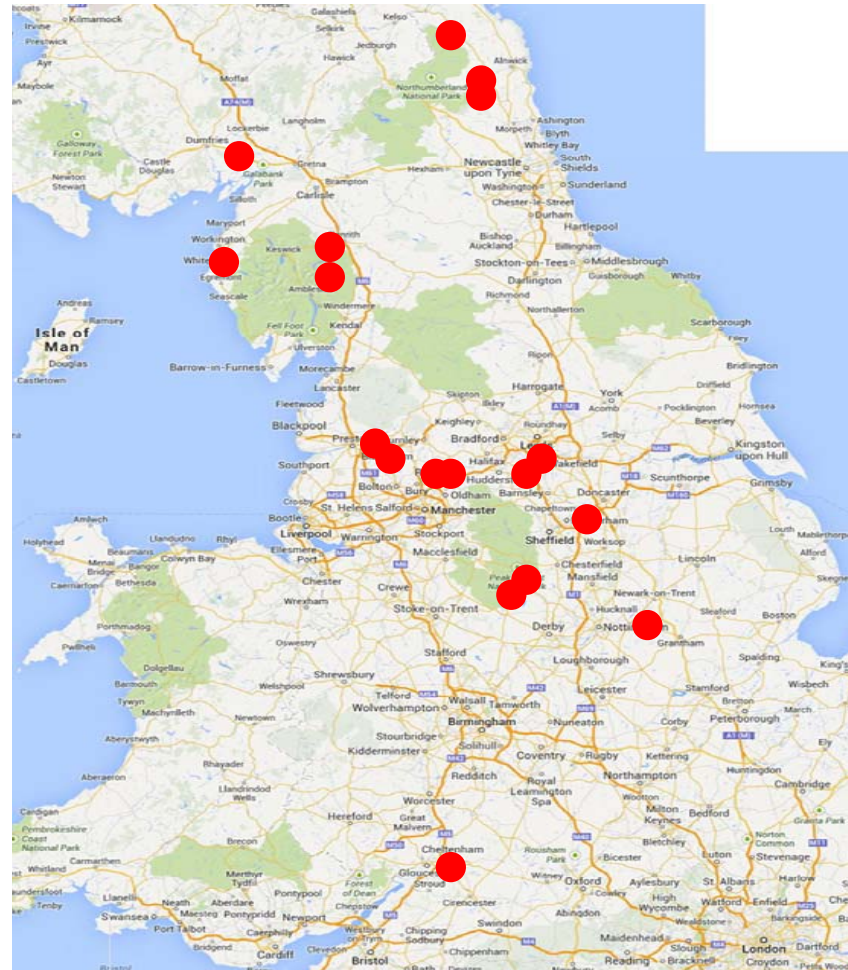
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## Mineral resources – Dimensional Stone focused

Quarrying assets primarily  
with dimensional stone  
reserves

Opportunities to exploit  
further







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## Premier Mortars

Business growing strongly

Selective geographical areas for expansion





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## St Ives Site



## **St.Ives Service Centre Information**

- St.Ives is 27 acres in area
- St.Ives employs over 200 people across 4 shifts with over 80% living within 10 miles of the site.
- ISO 9001/2000 Quality, 14001 Environmental, OHSAS 18001 Health & Safety
- The first site in the group to be PAS99 accredited
- BPCF Award “Highly Commended” for product innovation.
- At peak volumes distributing 19,000 tonnes of product per week (approx 150 articulated loads per day)



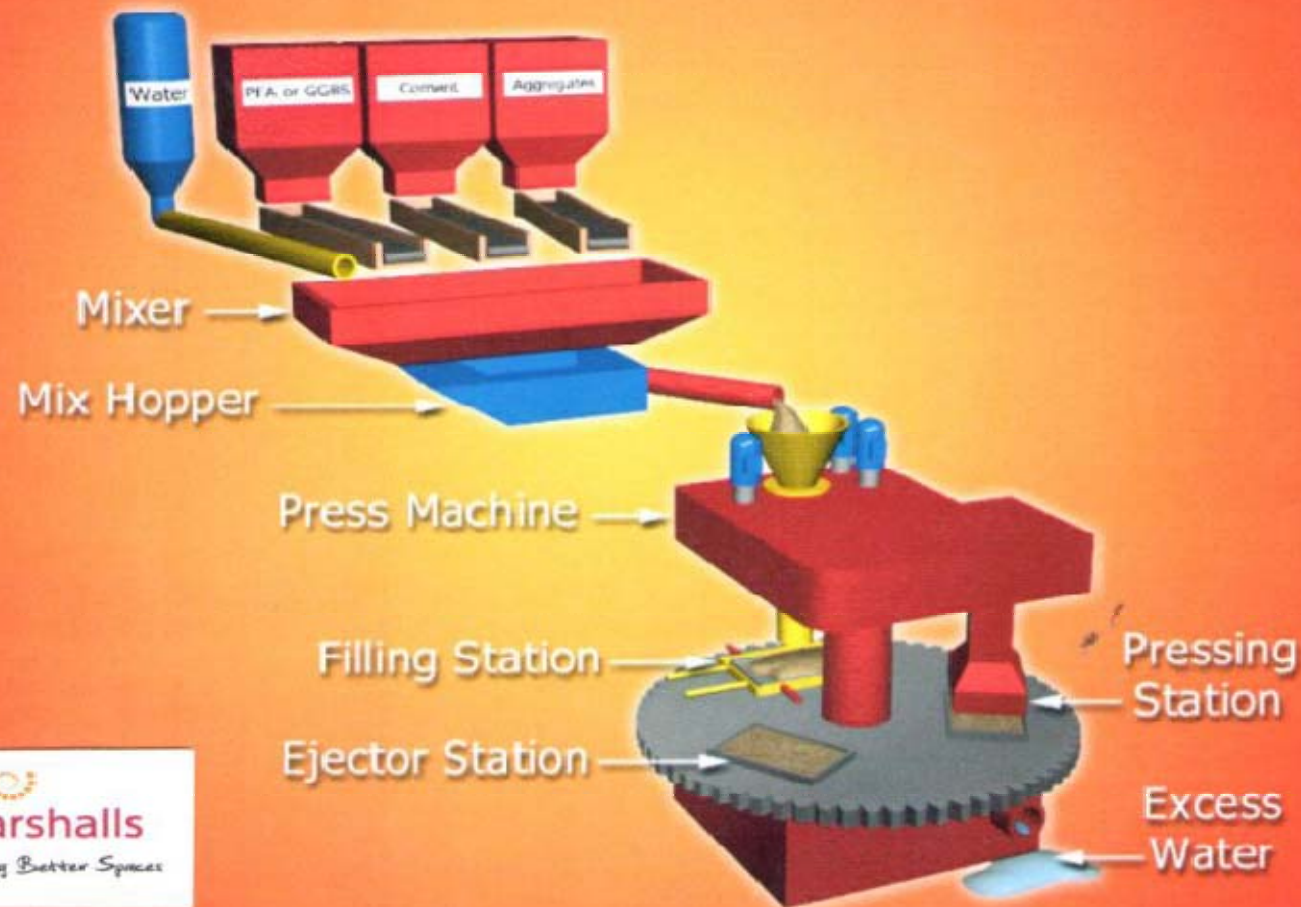


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## Mainly Standard Flag & Kerb

### Manufacturing Process - Hydraulically Pressed



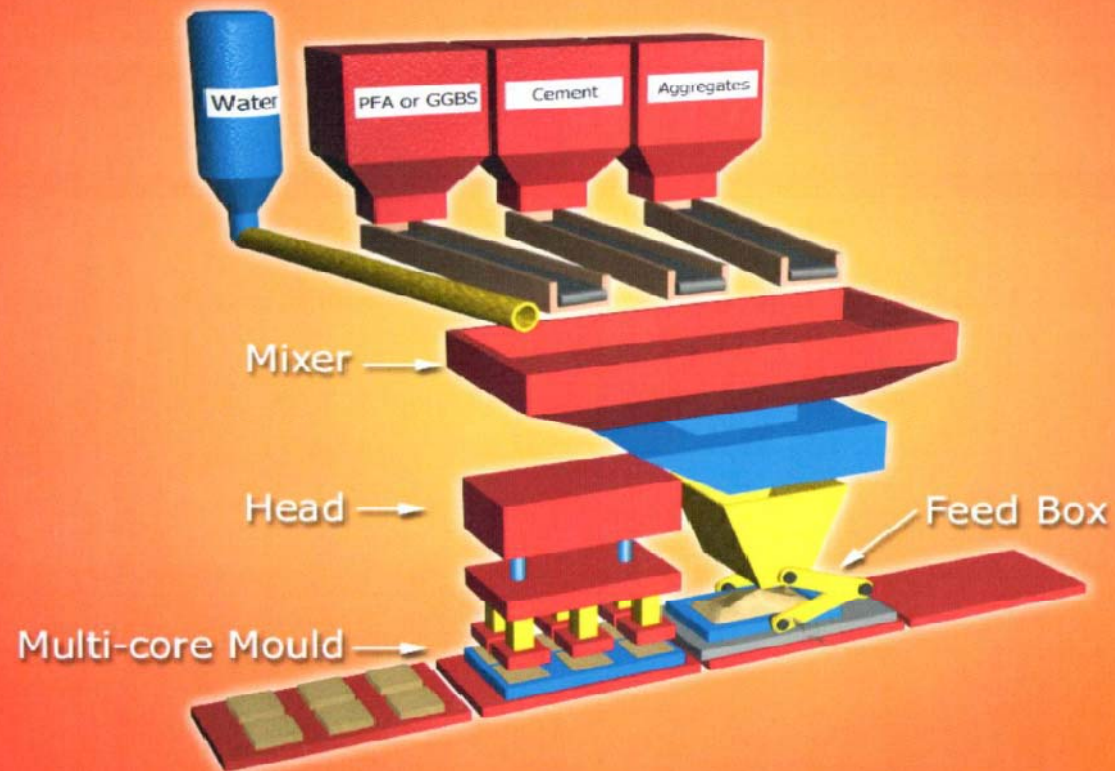


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## Mainly Concrete Block Paving

### Manufacturing Process - Semi Dry Process

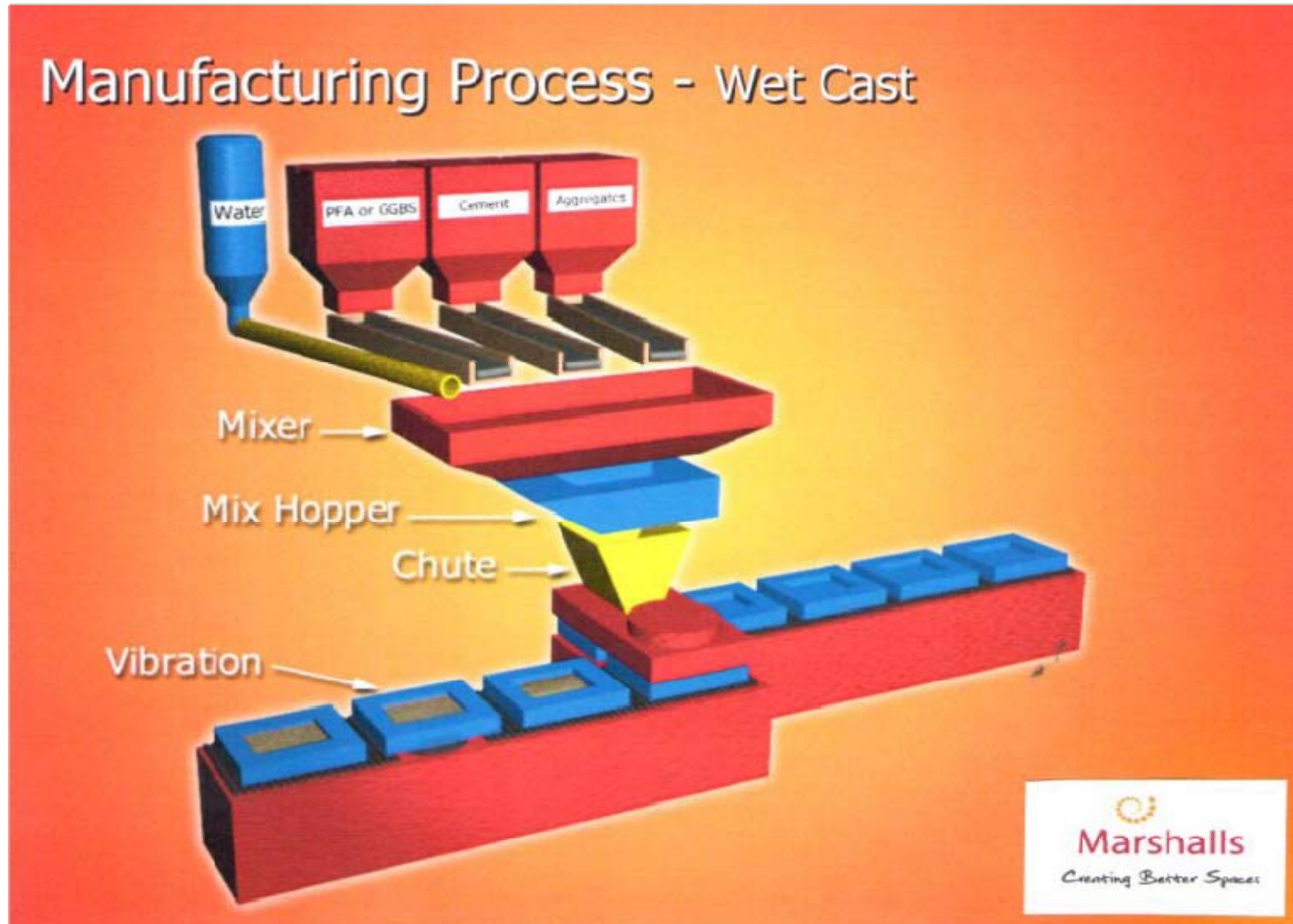




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## Mainly Decorative Domestic Flags







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## **Today's Tour**