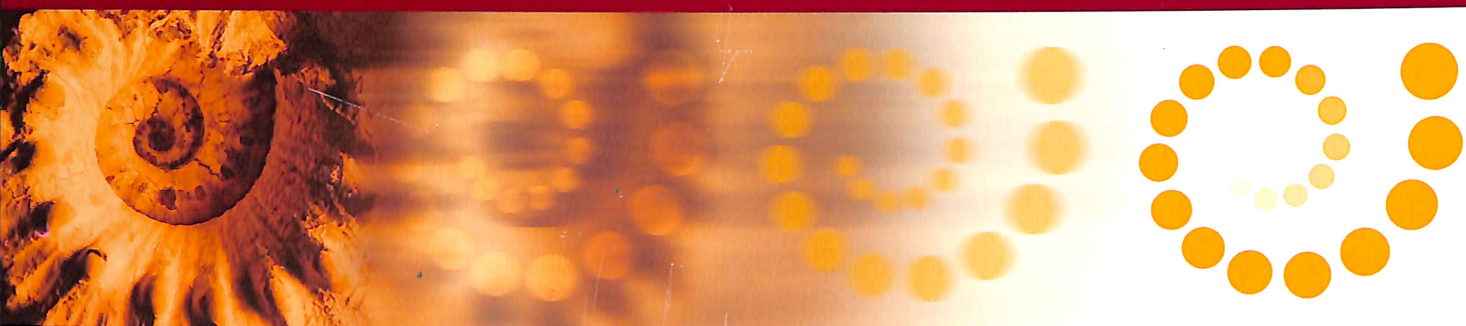




GROUP PROFILE



Marshalls



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INTRODUCTION



From the humble beginnings of a small quarrying business near Halifax started by Solomon Marshall in 1880, the company has grown and expanded its interests to where it is now a public company with turnover of more than £275 million and employing 3000.

The main focus of the business today is landscape products for both the domestic and commercial markets, where it has a dominant position in the UK. The Group's market leadership is built on the solid foundations of product quality and manufacturing efficiency, supported by a strong commitment to outstanding sales and delivery service to its customers.

Through the years the Group has widened its building materials interests, concentrating on products and markets that serve the same customers and use the same channels of distribution as its main landscape products business. These include bricks, clay pavers, natural stone and a variety of other products.

The pages that follow explain in more detail the various parts of the Group, how it serves its customers, and illustrates the exciting and quality products it manufactures.



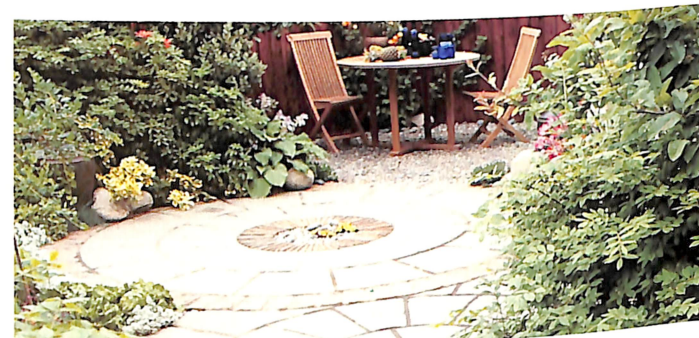
LANDSCAPE PRODUCTS

Domestic

Domestic LANDSCAPE PRODUCTS

This Division is forward looking and innovative, with new product development a key feature. Costs have reduced, as investment in technological development has automated manufacture in this traditionally labour intensive process. The aim is to add value, making more of concrete, to provide a quality product that's widely available and backed by excellent service. Anticipating and setting trends in the latest landscape products, Marshalls provide technical advice and guidance for garden design and landscaping.

Marshalls is continually extending the domestic landscape product range. Surfaces for patios or gardens and block paving for driveways, sell through builders merchants, garden centres and home improvement stores.



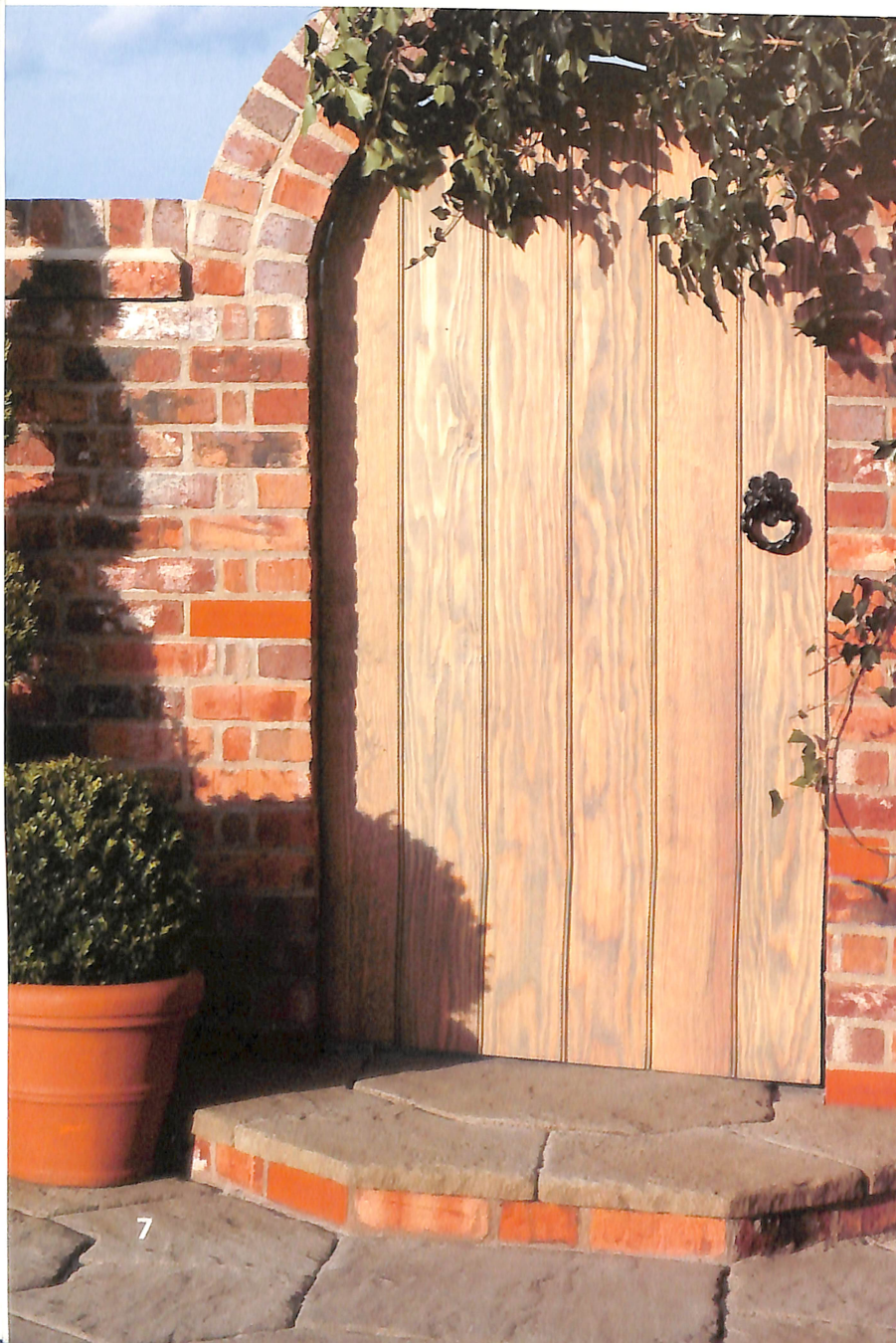
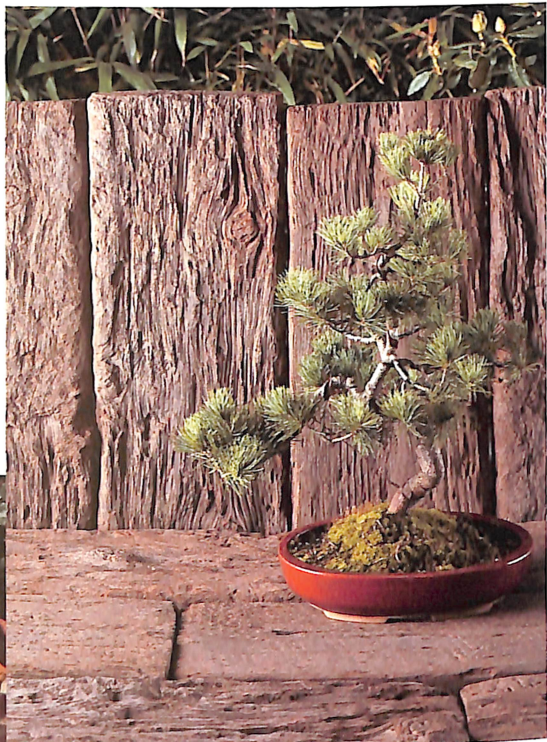
The Division launches this Spring an extensive advertising campaign focused on the homeowner, and designed to increase the demand for block paving, garden and patio products. Through landscape contractors, that Marshalls approve to participate in the programme, consumers will be offered a ten year product and workmanship guarantee.



The two pictures on this page are examples from a series of advertisements that will appear regularly in home interest, gardening and national press magazines between April and September this year.

Featuring amusing but aspirational garden images under the slogan "Marshalls driveways and patios get you noticed", they will increase recognition of Marshalls as the leading brand in the sector.

A second brand, Stonemarket, was acquired in September 1998. This range of garden landscape materials, quality decorative paving, walling, stone, edging, coping and related accessories, is highly regarded by landscape gardeners and specialists. Through years of clever product innovations and focused marketing the company has built a reputation for quality and design.



LANDSCAPE PRODUCTS

Commercial

Commercial LANDSCAPE PRODUCTS

Marshalls has an established heritage of innovation, making a large range of paving surfaces and accessories with long term durability and excellent load bearing capabilities. Concrete paving flags are the most widely used form of surfacing for pedestrian pavements. With the widest available choice of block types, shapes and colours, there's always a design solution that's compatible with the environment and the surrounding architectural style.

This is why Marshalls products are most frequently specified on prestigious projects like the Millennium Dome.

Marshalls specialises in answering client problems in every situation from pedestrian to ultra heavy duty industrial use. Constant technical and product innovation produce surfaces that both perform efficiently and are aesthetically appealing. This and the Group's extensive investment in capital and quality give the architect, specifier and engineer a truly professional service.





CLAY PRODUCTS

The Division has this year taken another major step in serving their builders merchant, contractor and other customers. They have used the Eaglescliffe depot to create the blue print for turning most sites throughout the country into Service Centres capable of supplying customers with a comprehensive range of Marshalls products in mixed loads for immediate delivery. When complete this will enable the Division to offer customers nationally a level of service unmatched by any competitor.

CLAY PRODUCTS

No matter what technology may produce, clay is one of the most satisfying materials to build with. From humble beginnings, that most basic of items – the simple brick – produces buildings of such grandeur and beauty.

Marshalls joined the brick industry at the end of the eighties, when the Group bought first Armitage and later Yorkshire Brick. Today the quality and versatility of the bricks are amply demonstrated in many a prestigious project. Canary Wharf, Liverpool University – these and many more show Marshalls' innovation and skill in brick making.

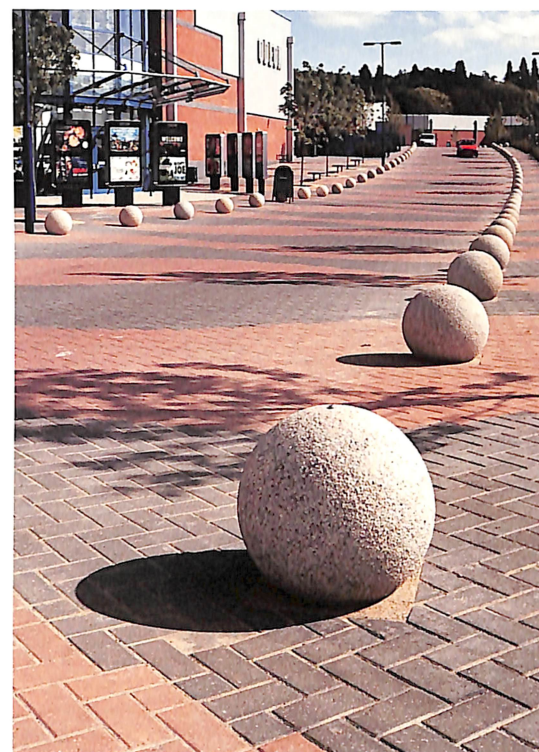


This reputation for high quality is confirmed by the Group's regular success in the Brick Development Association Brick Awards.

Modern tunnel kilns in four highly automated Marshalls factories turn out 180 million bricks each year as well as incorporating departments producing purpose made special brick shapes.



With attention to quality and constant product development, the Group aims to sell top of the range, exclusive bricks – often specialist products. Marshalls is the major UK manufacturer of some of these specialist bricks; such as the Nori range of acid resistant brick known and sold worldwide; and one of a smaller number making them internationally.



Marshalls is also the UK's market leader in the manufacture of clay pavers using modern technology at its Accrington factory.

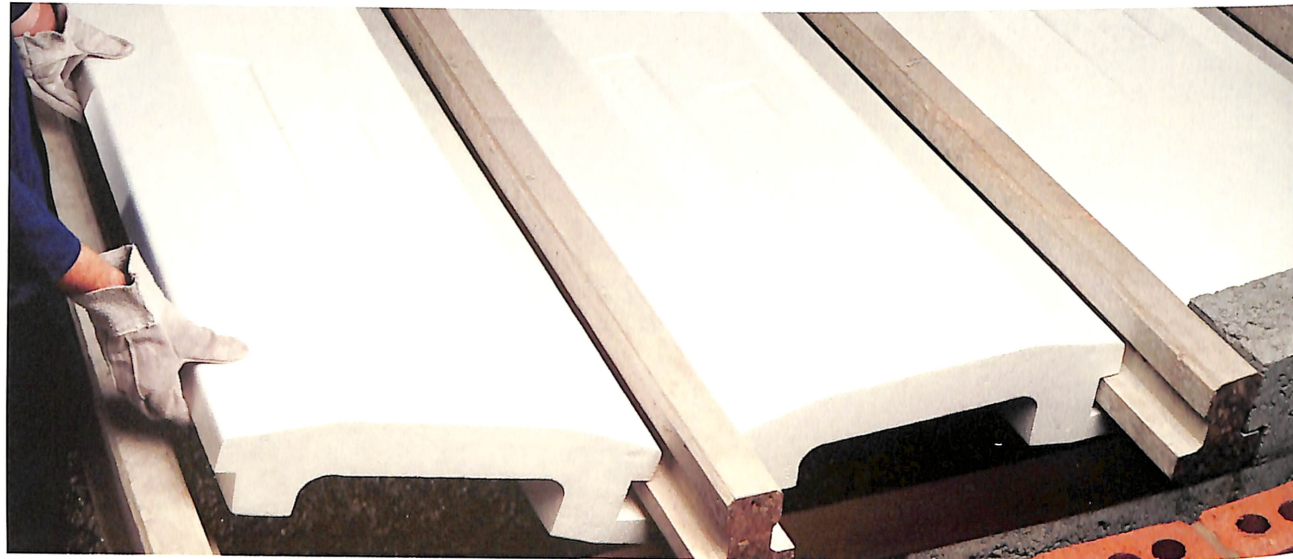
The premium quality pavers are sold into the UK domestic driveway and commercial hard landscape markets. A significant amount are exported worldwide having been specified for prestigious commercial building projects.



EMERGING BUSINESSES

Flooring

A composite suspended flooring system, with one of the highest levels of insulation available designed for ground floors. It combines all the merits of beam and block construction with the benefit of high thermal insulation.



Renowned for innovation, Marshalls is one of the country's leading manufacturers, with more than forty years expertise in precast concrete flooring systems. As well as conventional concrete beam, block and slab flooring, Marshalls produces composite systems incorporating expanded polystyrene blocks. The Division also provides all the other precast components a builder might need, such as stairs, landings, balconies and other specially designed items.

Searching out the new, resulted in the key product in the range – Jetfloor Super.

It's versatile and fast to install, saves cost, has environmental integrity and is supremely durable.

To support a quality product range, there is a nationwide installation service and the Contracts Department is prepared to manage every stage of a large contract from pre-design, through manufacture to installation.

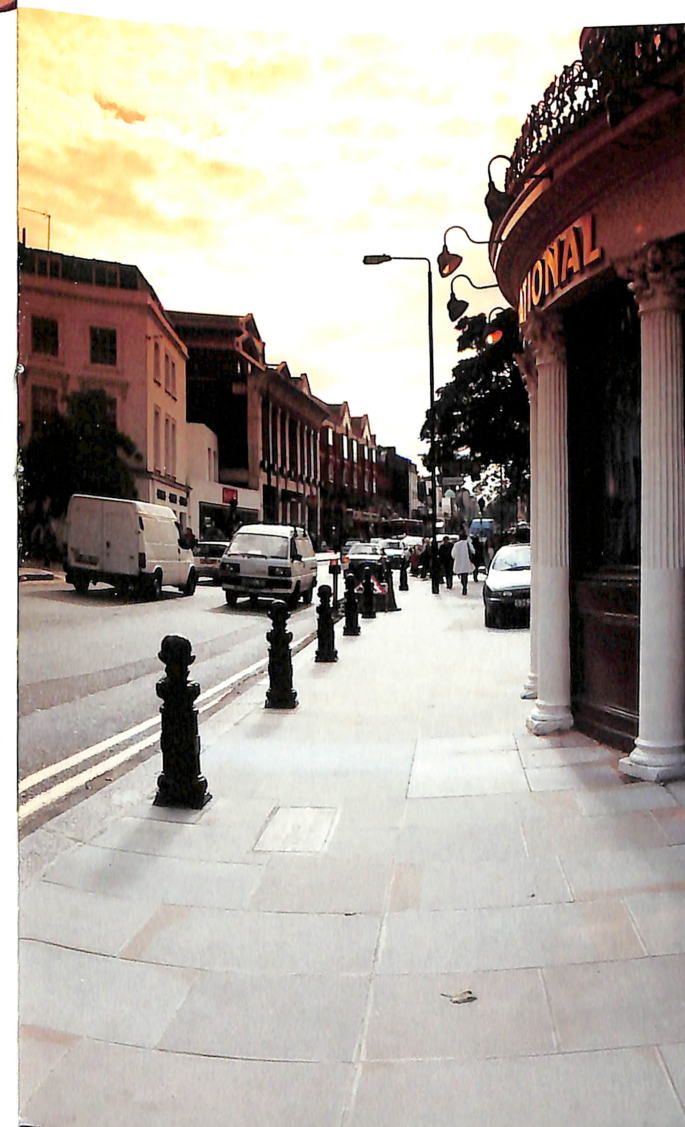
Natural Stone

For over a century, Marshalls has been quarrying Natural York Stone and using its enduring beauty, versatility and durability in every paving situation from new building to refurbishment.

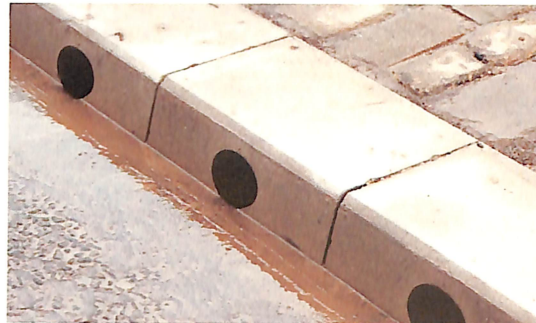
Look down in the street in cities all over the world and you'll see it. Its striking character enhances the most prestigious of settings, from Trafalgar Square to Buckingham Palace to Main Street Gibraltar. Here, when aesthetics are equally as important as being durable and non-slip, Diamond Sawn Paving becomes the natural choice.

Skilfully drawing on the layers laid down by nature, Marshalls puts the ingredients of inspiration into the hands of architects, specifiers and builders.

This, the widest choice of stone in the United Kingdom, includes granite and comprises hundreds of finishes and colours. Time-honed traditional masonry skills, overlaid with modern production techniques, bring out textures, patterning and hand-dressed finishes that work equally well in both modern and historic settings. Just one in an ever growing portfolio of stone products, Greenmoor Rustic Setts and Paving complete the more traditional schemes perfectly. The Division exports to Europe, USA and the Far East. Extensive investment in sophisticated new technology breeds a constant stream of innovation, infusing Marshalls' customers with new inspiration.



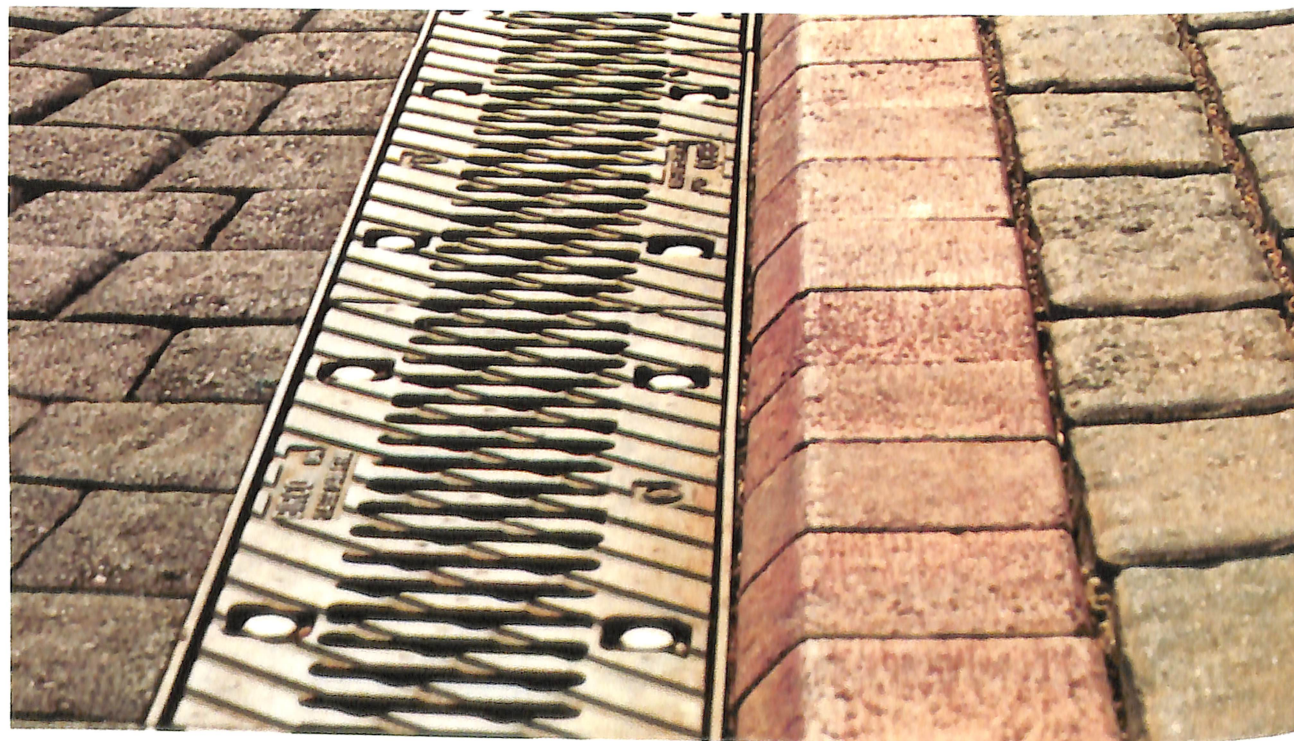
Drainage Products



Marshalls manufactures and supplies a range of linear drainage for use in highway construction and hard landscaping schemes in both the commercial and domestic sectors.

Providing practical solutions that solve problems is the strength of the business. As you travel along motorways or major roads you will see, for example, "beany" one of Marshalls innovative kerb and drainage combinations.

The landscaping products range would also be incomplete without a means of removing excess water from the driveway. Birco drainage channels provide the solution. They are available in various sizes to suit specific applications and to fit with Marshalls concrete products.



Street Furniture



The main customers of the business are local authorities, but the range of products available ensures that they are also used in commercial and industrial development schemes.

Marshalls also manufacture a broad range of street furniture and supplement it with the resale of complementary products that are used alongside the Group's landscape products in urban landscape construction projects.

Improving the urban environment is a worthy aim. Marshalls provides a broad range of street furniture produced in a variety of materials to enhance the appearance of any town.

A wide range of styles are available and schemes are designed to complement the local environment and architecture.

Classical Flagstones

The most recent addition to the Marshalls portfolio is a small company that specialises in handmade flagstones for the interior market. Authentically recreating natural stone to provide aesthetically beautiful flooring, which has been described by leading commentators as “stunning” in appearance, allows the products to be used in private homes but also hotels and other commercial projects.



LANDSCAPE PRODUCTS

Bardon, Leicestershire
 Bridgend, Mid Glamorgan
 Cannock, Staffordshire
 Chichester, West Sussex
 Dunsville, South Yorkshire
 Eaglescliffe, Cleveland
 Falkirk, Stirlingshire
 Halifax, West Yorkshire
 Llay, Clwyd
 Long Eaton, Nottinghamshire
 Maltby, South Yorkshire
 Mansfield, Nottingham
 Newport, Gwent
 Ramsbottom, Lancashire
 Ryton, Warwickshire
 Sandy, Bedfordshire
 Sittingbourne, Kent
 St. Ives, Cambridgeshire
 Weston-Super-Mare, North Somerset

CLAY PRODUCTS

Accrington, Lancashire
 Barnsley, South Yorkshire
 Dewsbury, West Yorkshire
 Swillington, West Yorkshire

EMERGING BUSINESSES

Natural Stone Products
 Halifax, West Yorkshire
 Huddersfield, West Yorkshire
 Ramsbottom, Lancashire

Flooring Products
 Hoveringham, Nottinghamshire

Classical Flagstones
 Bath, Somerset



