



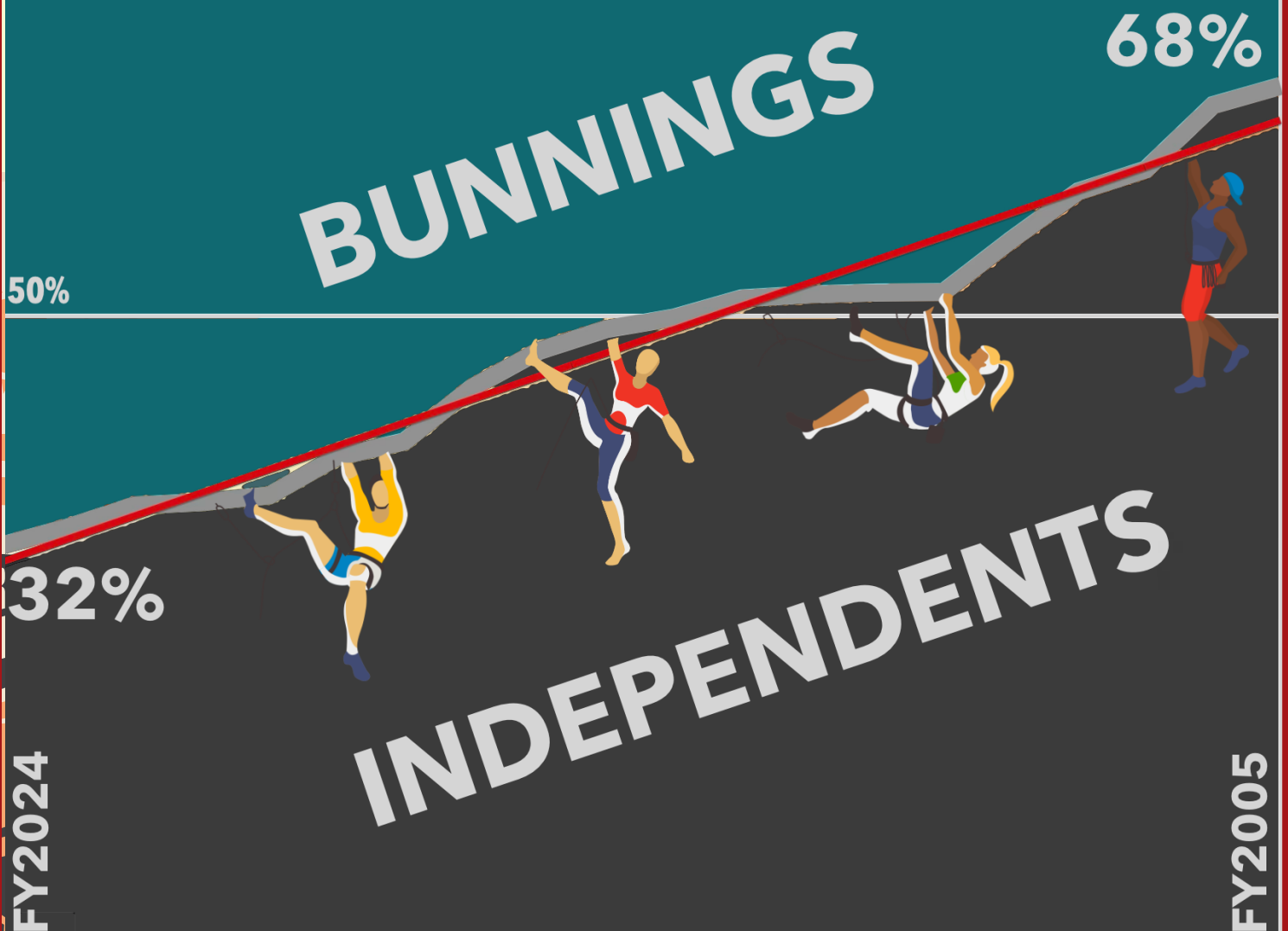
HBT NATIONAL BUYING GROUP 2025 CONFERENCE

KLINGSPOR DIAMOND TOOLS

100%

SURVIVAL

CAN INDEPENDENTS GROW?



contents

HI NEWS VOL 9 NO 2



2025 HBT CONFERENCE

HBT National Buying Group is hosting its 2025 conference in Brisbane. We profile its two major speakers, Todd Sampson of Gruen fame, and Brian Walker aka “The Retail Doctor”.

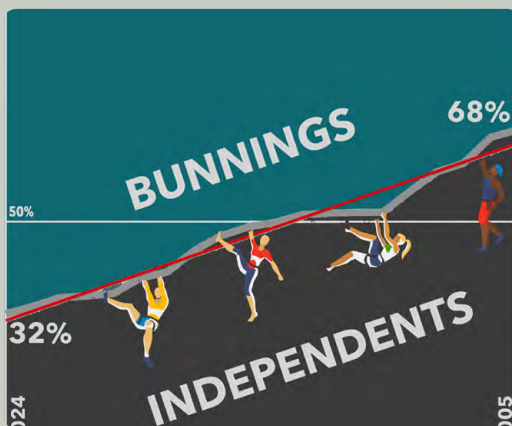
7

HBT TRADESHOW EXHIBITORS

It can be tough finding new suppliers in the crush of the one-day tradeshow. HardwareNews has made it a bit simpler by categorising each exhibitor under helpful categories. Just click to find a company name, and see their website.



9



RETAIL STATS: THE LAST SHOW

The Australian Bureau of Statistics is ending its helpful series of statistics which provide hardware retail turnover. We thought we’d end things with a bit of a bang, so we’ve delved deeply into these historical stats.

39

PUBLISHER'S NOTE

It's always great catching up with retailers at the HBT Conferences.

3

OPINION

As the stats analysis in this issue shows, things for independents are tough. What to do?

4

KLINGSPOR

Abrasives manufacturer Klingspor celebrates 10 years of making diamond tools.

6

publisher's note

I'm sure I'm not alone in finding the very best part of every HBT conference is catching up with hardware retailers from across Australia. I would find it hard to believe that any other bunch of retailers would be quite so unique, or have so many "characters". While the events and the speakers are interesting and entertaining, it's talking to the people who make up hardware that I find the most captivating.

That said, over the years one of the sadder things at many conferences is just hearing from so many hard-working, well-informed, ethical people that they are doing it tough. They don't often come out and say just that, but you can tell by the way they talk about their lives that they may love hardware but they're less sure that hardware is going to love them back.

It was thinking about that which led us to come out with the main theme of this issue, which is looking at just how much growth in the industry has gone to Bunnings instead of independents.

The thing about talking about Bunnings with hardware retailers, is that there are typically two different stories. Either it is that Bunnings is not doing as well as they claim (which is, you know, doubtful), or that Bunnings is a monopoly, or a quasi-monopoly.

Funny thing, sometimes it's one person telling you both stories!

What we do know with some clarity is that, once you adjust the retail numbers for inflation, and look at how much of overall retail turnover Bunnings is taking, you can easily see why so many retailers are doing it tough.

I really believe that the retailers I speak with every year do have it in them to take back some of the market share the independent sector has lost. But to do that, they may have to change,

adjust to new markets, and new opportunities. And the fact is that, tough as it may be, that change has to start by acknowledging what has been lost.

The thing is, I don't really believe that retailers are all that reluctant to change. But I do think that the last 20 years have been so hard for many of them, that they've forgotten how much better they could be — and we're not talking "riches" here, but rather surety of income.

Can we get our sparkle back? Can we reverse the loss of market share?

I really do believe that's possible. But we need to start sooner than later, because we are losing ground pretty quickly now.



comment

In FY2025 dollars, Australian hardware retail revenue in FY2005 was \$13.5 billion for non-Bunnings and \$6.4 billion for Bunnings. In FY2024 that had changed to \$8.3 billion for non-Bunnings, and \$17.7 billion for Bunnings.

While the rest of the market declined by 38%, Bunnings grew by 179%. The result is what HardwareNews has depicted in its “headline” graph: in FY2005 Bunnings held 32% of the market, and non-Bunnings retail was 68%; in FY2024, Bunnings held 68% of the market, and non-Bunnings retail had 32%.

One reason why HardwareNews wanted to deliver these stats is that, even today, after all the very evident growth Bunnings has delivered, we still hear people in hardware retail cast doubts on Bunnings’ success. That might get a cheer from a crowd, but it is delusional.

An important element of those stats is that between FY2005 and FY2024, Bunnings Australia captured \$4.8 billion from the rest of the Australian market, but it also took all of the growth in the market, worth \$6.2 billion. None of the market growth benefitted independents.

A leading contributor to this, in HardwareNews’ opinion, is that most independent hardware retailers in the 2010s adopted what could be termed the “pub” approach to retail. Their advantages, they believed, came down to better, personalised service, and being hyperlocal to their intended customer base.

The rest of what they did in retail, however, was not that different from what Bunnings was doing. Effectively, they were Bunnings, but smaller, closer and nicer.

That works with a pub. In hardware retail, as the stats indicate, not so much.

The question that is really facing independent hardware retailers in FY2026 is how can they evolve their business models so that, at the very least, they stop losing market share to Bunnings.

That’s going to mean doing something different from Bunnings, as, unsurprisingly, Bunnings is better at that than anyone else. In other words, low prices really are just the beginning. To survive, the industry needs much more as well.



FIND TRUE INDEPENDENCE WITH THE POWER OF HBT



At HBT, we bring together over 900 independently owned stores across Australia to create a powerful buying force.

For independent businesses, this means access to group **purchasing power, exclusive supplier deals, and tailored support** that puts them on equal footing with larger competitors. Through HBT, Members gain the benefits of a large network while **maintaining the flexibility and autonomy of an independent.**

➤ **Rebates from Every HBT Supplier:** Every HBT supplier contributes a rebate to purchasing members, ensuring you earn financial rewards on every order. Payments are made to members at the end of each quarter.

➤ **Enhanced Supplier Support:** Gain access to accredited Supplier Partners who provide field support specifically tailored to your businesses, ensuring your unique needs are met.

➤ **Access to Exclusive Deals:** Tap into a range of deals that are exclusive to HBT members, giving you a competitive edge in the market.

➤ **Business Support:** Benefit from HBT's expert business platform, MyHBT Portal, making it easier to manage supplier relationships, shop promotions and access a range of features to assist you in running your business.



Klingspor's decade of diamond tools

The company's CEVOLUTION technology is being used for the first time in its DT 350 AB diamond cutting blade

Abrasives manufacturer Klingspor celebrates a special anniversary this year, 10 years of making diamond tools.

For a decade, Klingspor has been setting standards in the development and manufacture of diamond tools. This anniversary marks not only a success story, but the company's continuous progress and innovation as well.

For example, Klingspor's team has succeeded in extending the service life of the diamond cutting blade DT 350 AB by an impressive 50%. The secret? A special ceramic grain in the abrasive segment.

Since its launch, the DT 350 AB has been a favoured product in road construction because of its effectiveness when used on asphalt and concrete. Klingspor's head of product management, Anton Bodrin explains:

Especially on asphalt, we realised there was room for the DT 350 AB to improve. Teaming up with our product developers in Germany and our product testers all over the world, we were able to improve the blade in such a way that it now delivers a service life that is increased by 50%.

The developers relied on ceramic abrasive grain to achieve this level of performance. Its physical properties, such as great hardness and good integration, allow the special ceramic grain in the blend to ensure greater stability and less heavy wear on abrasive materials such as asphalt. At the same time, it supports the cutting effect of the diamonds.

These properties made the DT 350 AB the first diamond cutting blade to receive the CEVOLUTION seal. In this product, as in other abrasives in Klingspor's product range, CEVOLUTION translates to a clearly noticeable product improvement. Products

bearing the CEVOLUTION logo contain ceramic abrasive grain and are optimised for their different applications.

Numerous independently conducted test trials in different countries also confirmed the improvement in the diamond cutting blade's service life. Mr Bodrin explains:

We work closely with our colleagues around the world. We provided them with prototypes of the innovation for testing purposes, and testers shared the same experience with us, from South America to France to Eastern Europe. The blades lasted around 50% longer at a slightly improved cutting performance, providing a distinctly noticeable product advantage for our customers.

Klingspor developed the DT 350 AB at its in-house diamond laboratory set up at the headquarters in Haiger, Germany. Engineering is followed by production at Klingspor's Ukrainian plant in Lviv, which uses only highly advanced machinery. Undergoing the most stringent quality inspections at every step of its cutting-edge manufacturing processes, the cutting blades are guaranteed to comply with the oSa® safety standard.

The oSa® safety standard refers to the Organisation for the Safety of Abrasives, a global organisation that sets safety standards for abrasive products. These standards cover various aspects of abrasive safety, including manufacturing, handling, and usage, to minimise risks associated with these tools.

At the HBT Brisbane trade show, Klingspor will showcase its extensive portfolio of its diamond tools, which has been an integral part of the company's product range since 2015.



Todd Sampson

The keynote speaker at this year's Conference, Todd has led a life that combines mountaineering, advertising and charity work

A mountaineer who has climbed Mount Everest unguided in 2001, Todd Sampson is well regarded as former chief executive and non-executive chair of advertising agency Leo Burnett in Australia. But he is probably best known for his television appearances as a panelist on ABC's "Gruen" and a co-host on Channel 10's "The Project" (since cancelled). He is a presenter and producer of TV documentaries that explore science, human behaviour and creativity, and physical challenges including "Life on the Line", "Redesign My Brain" and the Discovery International adventure-science series "Body-Hack".

His "Mirror Mirror" program has explored body image and the wellness industry in two separate series.

As an advertising executive, Sampson is the co-creator of the Earth Hour initiative, which won several industry accolades including the Titanium Lion at Cannes. He was awarded the Yahoo Chair for Innovation and B&T's Creative Campaign of the Year in Australia.

In 2009, Earth Hour became the biggest environmental movement in history with over 1 billion people participating in over 4000 cities around the world. He also led the creative team behind the successful Bundaberg Rum polar bear commercials.

Sampson has significant corporate board experience, spending 10 years on the Qantas board and sitting on the board of Fairfax Publishing from 2015 to 2018 until the newspaper publisher was acquired by Nine Entertainment.

His diverse career, knowledge and wide-ranging experience is a result of the endless curiosity he developed during a childhood spent in Nova Scotia. More specifically, he grew up in an urban commu-

nity called Sydney on the east coast of Cape Breton Island in Nova Scotia, Canada.

Snow fall is very heavy during winter in that region. He now makes his home near the beach in Sydney, Australia.

Growing up, Sampson was a natural risk taker, a personality trait that drew him to difficult and dangerous activities, such as climbing. But an

aptitude test at age 12 helped turn his attention and energy into academics and doing well at school.

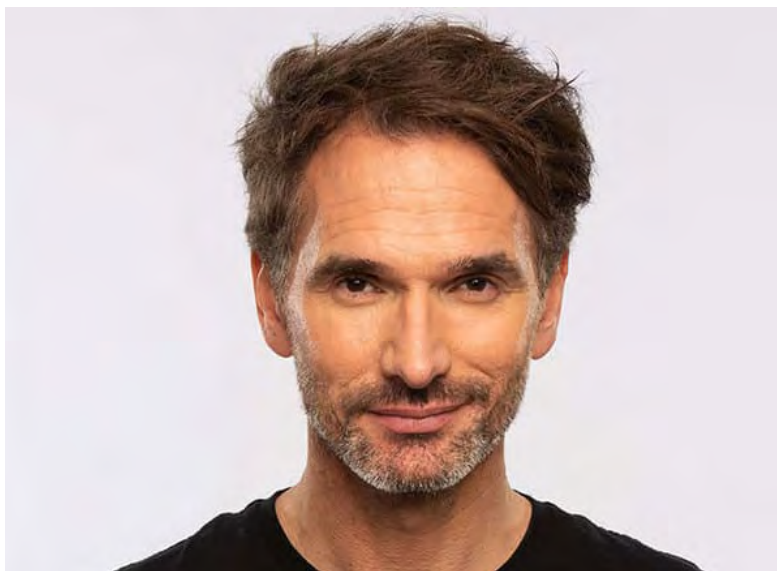
He joined the Sea Cadets (like the Boy Scouts, only wetter), which took him off his home island for the first time. By age 16 he left Isle Cap Breton for good, and completed his schooling at United World College. There he won a scholarship which led to him

studying economics and biology at Queens University in Ontario. Another scholarship took him to the University of Cape Town in South Africa to do an MBA.

There listening to a guest speaker from advertising agency Ogilvie & Mather spoke to the class piqued his interest and led him to consider advertising as a career. A job followed at a Cape Town agency, The White House, before he decided to move to Australia in the mid-1990s.

Before being appointed chief executive of Leo Burnett, he worked in strategy at The Campaign Palace, solving problems between a client and the agency's creative work. He started his television career when the ABC launched its panel show Gruen about advertising, hosted by Wil Anderson.

Aside from his television career, Sampson is known for his philanthropic work and has been involved in a range of charitable endeavours.



Brian Walker

Brian, familiarly known as “the Retail Doctor” is a well-known industry consultant and media commentator

Well-known retail expert Brian Walker has created a unique consultant brand position as The Retail Doctor advising retail businesses on their fitness. His proprietary Fit for Business™ program draws on his many years of experience in senior management and consulting with leading retailers including The Athletes Foot, Optus, Westfield, National Australia Bank, and Woolworths.

As a result, he brings extensive insights gained in the specialty retail, franchising and shopping centre sectors. He has successfully led change teams in omni-channel retail and has been instrumental in the development and implementation of a number of integrated retail channel strategy projects including Optus, Hutchison Telecommunication, Global Brands Group, The National Australia Bank and a host of other recognisable retail, franchise group and service organisations both in Australia and overseas.

In his role as Retail Doctor Group (RDG) chief executive, which he established in 2005, Walker is also a leading media commentator on retail issues. He regularly appears on the ABC, Channel 9 News, A Current Affair and Channel 7, and has become one of Australia's most sought after headline speakers on all aspects of retail.

When Bunnings announced it was expanding its automotive range to include electric vehicle (EV) equipment, Walker commented that it would help position the hardware chain for longer-term growth.

He sees the move as part of a strategy from Bunnings to become much more than just Australia's largest chain for hardware goods. In The New Daily, Walker said:

They're expanding into retirement living products as well. The growth in these categories expands out the Bunnings offer, creating reasons for customers to visit ... and as they get more volume with their suppliers their buying power increases too.

With the move into EV products, Walker believes that Bunnings is taking a bet on what we know about the future of transport.

EVs are 10% to 12% of the overall car market at the moment. The projections are that it will be at 20% to 25% in the next three years.

Walker said the move into automotive also needs to be seen in the context of Amazon's rising presence across the entire retail market, and Bunnings needs to grow to keep up with them.

Bunnings are trying to better leverage their in-store and online presence. You go deeper into categories and they all appeal to their core market – middle Australia.

From his vantage point as a retail consultant, Walker is often considered as something of a futurist for the industry. In the Australian Financial

Review, Walker said Australia has the world's third-highest store density per capita.

As more retail shifts online, which is forecast to reach 24 per cent of retail sales by 2030, and to subscription-based services, which are forecast to quadruple in 10 years, retailers will need to rethink the size of their store networks.

We'll see much more omnichannel retail and retail ecosystems. It will be much more about retailers reaching these consumers [in their homes], not relying on these consumers to come into their physical space ... while the physical experience will be about community, engagement and entertainment.



HBT CONFERENCE TRADESHOW EXHIBITORS



HBT TRADESHOW CATEGORIES

Retail services

RETAIL SERVICES

VIEW	AB Phillips	
VIEW	ACR Software	
VIEW	BHD Queensland	
VIEW	Fill The Pallet	
VIEW	Image Worx Promotional Merchandise & Uniforms	
VIEW	IndiHub	
VIEW	Jiwa Financials	
VIEW	Merlin Software	
VIEW	National Timber & Hardware Assocation	
VIEW	Shift	
VIEW	SI Retail	
VIEW	Sterland Computing	
VIEW	Sympac Solutions	

Software/IT Services

SOFTWARE/IT SERVICES

VIEW	ACR Software	
VIEW	Dynamic Solutions	
VIEW	Foresight Software	
VIEW	Jiwa Financials	
VIEW	Merlin Software	
VIEW	Sterland Computing	
VIEW	Sympac Solutions	

Power tools

POWER TOOLS

VIEW	Airco Brands	
VIEW	ATS Tyrolit	
VIEW	Austech Industries SP Tools	
VIEW	DTA Australia	
VIEW	Electaserv Trading	
VIEW	Gamer Industrial Supplies	
VIEW	GARDENA / Neta	
VIEW	HiKOKI / Metabo	
VIEW	JAK MAX	
VIEW	Kincrome	
VIEW	Makita	
VIEW	Masport	
VIEW	Paslode	
VIEW	RapidTool	
VIEW	Senix Australia	
VIEW	Stanley Black & Decker	

POWER TOOLS

VIEW	The Tool Group	
VIEW	Thunderbird Ag	
VIEW	ToolHub	
VIEW	Weldclass	

Fasteners

FASTENERS

VIEW	Airco Brands	
VIEW	Bremick	
VIEW	Hobson Engineering	
VIEW	Macsim	
VIEW	SPAX Pacific	
VIEW	Wilmaplex	

Compressors

COMPRESSORS

VIEW	Airco Brands	
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Industrial

INDUSTRIAL

VIEW	Airco Brands	
VIEW	Excision	
VIEW	Fosroc	
VIEW	Gamer Industrial Supplies	
VIEW	H.B. Fuller	
VIEW	HiKOKI / Metabo	
VIEW	JAK MAX	
VIEW	Josco Australia	
VIEW	Klingspor Australia	
VIEW	Macnaught	
VIEW	Makita	
VIEW	Maxisafe	
VIEW	NORMA Group	
VIEW	Pacific Gas	
VIEW	PFERD Tools	
VIEW	PPG	
VIEW	RapidTool	
VIEW	RedCat - Build with Quality	
VIEW	Richmond Rolling Solutions	
VIEW	Sutton Tools	
VIEW	Tridon Australia	

Rural

RURAL

VIEW	Airco Brands	
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HBT TRADESHOW CATEGORIES

RURAL

VIEW	AMES	
VIEW	Nemtek Electric Fencing Products	
VIEW	Neove Pharma Australia	
VIEW	Reln	
VIEW	Spear & Jackson QEP Australasia	
VIEW	Sunrise Hardware & Garden Products - RALLY	
VIEW	Thunderbird Ag	

automotive

AUTOMOTIVE

VIEW	All States Trailer Spares	
VIEW	Mocare Australia	
VIEW	Power DC	
VIEW	Pro-Kit	
VIEW	Tridon Australia	

Outdoor

OUTDOOR

VIEW	AMES	
VIEW	Galintel	
VIEW	GARDENA / Neta	
VIEW	HiKOKI / Metabo	
VIEW	JAK MAX	
VIEW	Makita	
VIEW	Masport	
VIEW	Reln	
VIEW	Spear & Jackson QEP Australasia	
VIEW	Stanley Black & Decker	
VIEW	SuperSleepers	
VIEW	Urban Direct Wholesale	
VIEW	Vespol	
VIEW	Whites Group	

Safety Equip

SAFETY EQUIP

VIEW	AMES	
VIEW	Bailey Ladders and Fall Protection	
VIEW	Beaver Brands	
VIEW	Dy-Mark Australia	
VIEW	Maxisafe	
VIEW	PIP Global Safety	
VIEW	Portwest	
VIEW	The Tool Group	
VIEW	Weldclass	

Distributor

DISTRIBUTOR

VIEW	AMES	
VIEW	CW Brands	
VIEW	Mayo Hardware	
VIEW	Medalist	
VIEW	Mocare Australia	
VIEW	PIP Global Safety	
VIEW	Power DC	
VIEW	Pro-Kit	
VIEW	Richmond Rolling Solutions	
VIEW	Romak Hardware	
VIEW	Sunrise Hardware & Garden Products - RALLY	
VIEW	The Tool Group	
VIEW	ToolHub	
VIEW	Tradeware	
VIEW	Tridon Australia	
VIEW	Urban Direct Wholesale	
VIEW	White International	
VIEW	Whites Group	
VIEW	Wilmaplex	

Laser Levels

LASER LEVELS

VIEW	Aptella	
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Wire/Steel

WIRE/STEEL

VIEW	Ariston Building & Rural	
VIEW	Lysaght	
VIEW	Weldclass	

Locks

LOCKS

VIEW	ASSA ABLOY	
VIEW	Gainsborough	
VIEW	Trio Australia	

Rigging

RIGGING

VIEW	Austlift	
VIEW	Hartman Group	

Plumbing

PLUMBING

VIEW	Aztec Australasia	
VIEW	FIX-A-TAP	
VIEW	Reln	

HBT TRADESHOW CATEGORIES

PLUMBING

[VIEW](#) RWC

[VIEW](#) Vespol

LADDERS

[VIEW](#) Bailey Ladders and Fall Protection

[VIEW](#) Gorilla Ladders

[VIEW](#) Hartman Group

[VIEW](#) Ladder Solutions

STORAGE

[VIEW](#) BHD Queensland

CEMENT

[VIEW](#) Boral

[VIEW](#) Cement Australia

[VIEW](#) Dingo Cement

[VIEW](#) Sunstate Cement

CONCRETE

[VIEW](#) Boral

[VIEW](#) Cement Australia

POWER TOOL ACCESSORIES

[VIEW](#) Bordo Industrial Tools

[VIEW](#) Brighton Best International

[VIEW](#) DTA Australia

[VIEW](#) Electaserv Trading

[VIEW](#) Gamer Industrial Supplies

[VIEW](#) HiKOKI / Metabo

[VIEW](#) Intech Tools

[VIEW](#) ITM

[VIEW](#) JAK MAX

[VIEW](#) Josco Australia

[VIEW](#) Kincrome

[VIEW](#) Paslode

[VIEW](#) PFERD Tools

[VIEW](#) RapidTool

[VIEW](#) Saint-Gobain Abrasives

[VIEW](#) Senix Australia

[VIEW](#) Sheffield Group

[VIEW](#) Stanley Black & Decker

POWER TOOL ACCESSORIES

[VIEW](#) Starrett

[VIEW](#) Sutton Tools

[VIEW](#) The Tool Group

[VIEW](#) ToolHub

[VIEW](#) Weldclass

ADHESIVES

[VIEW](#) Bostik Australia

[VIEW](#) Chemtools

[VIEW](#) CW Brands

[VIEW](#) H.B. Fuller

[VIEW](#) Mapei Australia

[VIEW](#) Selleys

[VIEW](#) Soudal

HARDWARE FITTINGS

[VIEW](#) Brighton Best International

[VIEW](#) CW Brands

[VIEW](#) Gainsborough

[VIEW](#) Galintel

[VIEW](#) H.M. Cowdroy

[VIEW](#) Hume Doors & Timber

[VIEW](#) RedCat - Build with Quality

[VIEW](#) Richmond Rolling Solutions

[VIEW](#) Romak Hardware

[VIEW](#) Trio Australia

[VIEW](#) VUETRADE

[VIEW](#) Wilmaplex

[VIEW](#) Zanda Architectural

BATTERIES

[VIEW](#) Century Yuasa Batteries

[VIEW](#) Power DC

LUBRICANTS

[VIEW](#) Chemtools

BUILDING MATERIALS

[VIEW](#) CSR

[VIEW](#) Fosroc

[VIEW](#) Innova

HBT TRADESHOW CATEGORIES

BUILDING MATERIALS

VIEW	ITI Australia	
VIEW	Laserlite Building Products	
VIEW	LevelMaster	
VIEW	Lysaght	
VIEW	Performance Membranes Australia	
VIEW	RedCat - Build with Quality	
VIEW	Stramit	
VIEW	SuperSleepers	
VIEW	Tilling Smartframe	

Insulation

INSULATION

VIEW	CSR	
VIEW	Fletcher Insulation	
VIEW	Fosroc	
VIEW	H.M. Cowdroy	
VIEW	Performance Membranes Australia	

Paint accessories

PAINT ACCESSORIES

VIEW	CW Brands	
VIEW	Dy-Mark Australia	
VIEW	Haymes Paint	
VIEW	Hempel (Wattyl) Australia	
VIEW	Monarch	
VIEW	PPG	
VIEW	Sequence Rokset	
VIEW	Uni-Pro Painting Equipment	

Hand tools

HAND TOOLS

VIEW	Dawn Tools & Vices	
VIEW	Electaserv Trading	
VIEW	GARDENA / Neta	
VIEW	Hot Devil & Naleon Products	
VIEW	Intech Tools	
VIEW	ITM	
VIEW	Kincrome	
VIEW	Klein Tools	
VIEW	Klingspor Australia	
VIEW	Sheffield Group	
VIEW	Spear & Jackson QEP Australasia	
VIEW	Stanley Black & Decker	
VIEW	Starrett	

HAND TOOLS

VIEW	The Tool Group	
VIEW	ToolHub	
VIEW	Weldclass	
VIEW	White International	

Cleaning

CLEANING

VIEW	Diggers / Recochem Inc	
VIEW	Dressed Timber Products / Lindsay Meyers	
VIEW	Dy-Mark Australia	
VIEW	Electaserv Trading	
VIEW	Sabco	
VIEW	Selleys	

Health

HEALTH

VIEW	Fastaid	
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Timber

TIMBER

VIEW	ForestOne	
VIEW	Hume Doors & Timber	
VIEW	Hurford's	
VIEW	ITI Australia	
VIEW	Meyer Timber	
VIEW	National Timber & Hardware Assocation	
VIEW	Pinewood Products	
VIEW	Porta	
VIEW	Simmonds Lumber	
VIEW	Tilling Smartframe	
VIEW	Vida Wood	
VIEW	Wesbeam	
VIEW	Woodhouse Timber	

Flooring

FLOORING

VIEW	Fosroc	
VIEW	Hurford's	
VIEW	Innova	
VIEW	Mapei Australia	

Electrical and lighting

ELECTRICAL AND LIGHTING

VIEW	HPM	
VIEW	Lusion	
VIEW	Nemtek Electric Fencing Products	

HBT TRADESHOW CATEGORIES

ELECTRICAL AND LIGHTING

[VIEW](#) Thunderbird Ag[VIEW](#) White International[Waterproofing](#)

WATERPROOFING

[VIEW](#) Mapei Australia[VIEW](#) Performance Membranes Australia[VIEW](#) Reln[VIEW](#) Selleys[VIEW](#) Soudal[VIEW](#) Vespol

HBT TRADESHOW EXHIBITORS

BLANK

WEB LINK



AB Phillips

Since first opening our doors in 1975, AB Phillips has always focused on providing integrated, professional and helpful advice to our clients. In that time, we have grown from a few key specialty sectors of insurance broking to having a team that offers an integrated, multi-sector risk and minimisation service for insurance and people management.

WEB LINK



ACR Software

We provide end-to-end system software to businesses in the wholesale, retail, manufacturing and telecommunications industries, servicing a diverse range of industry verticals from Hardware to Confectionery.

WEB LINK



Airco Brands

Airco Brands is a 100% Australian owned company with a proud legacy of three generations leading and managing the business. Airco Brands has provided quality tools and fasteners to the construction, manufacturing, retail and rural markets for over 60 years and is one of the largest diversified fastener companies in Australia and New Zealand, boasting six distribution centres nationally.

WEB LINK



All States Trailer Spares

From humble beginnings, All States Trailer Spares has grown to be one of Australia's leading wholesale trailer suppliers, offering trailers, parts and accessories to business owners all over Australia

WEB LINK



AMES

AMES Australasia has been designing, manufacturing, and distributing a wide range of innovative products for homeowners and professionals in Australia and beyond for over 120 years. We combine our strong heritage with modern innovation to create a range of products suitable for the new gardener through to trade professionals.

WEB LINK



Aptella

Aptella proudly distributes machine control and positioning systems across Australia, New Zealand and Southeast Asia. Our extensive portfolio extends beyond with complementary solutions from leading technology innovators.

WEB LINK



Ariston Building & Rural

That's been our vision since our founding by Ari Amoils in 2008. Ari didn't like the 'one size fits all' approach. He wanted to give customers exactly what they required so he set up an office in Bondi Junction, and became a specialist importer and distributor of wire and steel building products.

HBT TRADESHOW EXHIBITORS

WEB LINK

ASSA ABLOY

ASSA ABLOY

Every day, we help billions of people move through a safer, more open world with ease. If you've ever walked through an automatic door, stayed in a hotel, or gone through passport control, you've probably used one of our products or services. From reliable home security to cutting-edge biometric technology for businesses, governments, airports, hospitals, schools and more, we touch every part of every day.

WEB LINK



ATS Tyrolit

The Australia subsidiary of the globally operating industrial group was originally founded in 1984 under the name Castle Tools, boasting over 30 years in the Australian industry. It is this experience paired with almost 100 years' worth of TYROLIT knowledge in the field, which allows us to remain a market and innovations leader. We stay continuously dedicated to manufacturing only the very best diamond tools and equipment for our Australian customers.

WEB LINK



Austech Industries SP Tools

Proudly Australian owned and operating since 1987, Austech Industries is a market leader tool manufacturer and distributor of trade and commercial grade professional tools.

WEB LINK



Austlift

Austlift is a well recognised wholesaler in the Lifting Industry. The Australian owned company has been running for over 20 years in Lifting and Rigging and has been dealing in Material Handling for almost 10 years. We offer Lifting and Rigging, Load Restraint and Height Safety products as well as the installation and service of Tailgates, Docks, Cranes and other Material handling equipment.

WEB LINK



Aztec Australasia

Aztec is a family owned & operated, specialist manufacturer & distributor of innovative & high quality plumbing supplies hence our tagline - Aussie Tough, Aztec Smart

WEB LINK



Bailey Ladders and Fall Protection

Bailey Ladders have been trusted by tradies for over 65 years. BAILEY products are synonymous for working safely at heights, providing ladders and access equipment that are known for their quality, strength and stability. IF YOU WANT STRONG, STABLE, SAFE PRODUCTS, CHOOSE BAILEY!

WEB LINK



Beaver Brands

Established in 1977 as a wholesaler of Beaver Lifting & Materials Handling Equipment, Beaver Brands has grown to be one of Australia's leading distributors of everyday and specialised safety products.

HBT TRADESHOW EXHIBITORS

WEB LINK		BHD Queensland At BHD QLD, we are dedicated to empowering businesses to enhance their storage capabilities and optimise warehouse flow, ensuring superior organisation and accessibility. Our commitment to excellence is reflected in our diverse array of advanced warehouse storage solutions, meticulously designed to streamline operations, bolster safety, and minimise costs.
WEB LINK		Boral Boral is Australia's largest vertically-integrated construction materials company. That means we not only supply customers with outstanding raw materials like aggregate and sand, we also develop and produce advanced construction materials and solutions like low-carbon concretes and advanced asphalts.
WEB LINK		Bordo Industrial Tools At Bordo International Pty Ltd, we believe that excellence is not just a goal; it is our guiding principle. Since our establishment in 1987, we have dedicated ourselves to providing the highest quality industrial cutting tools and accessories to our customers across Australia. As a proud 100% family-owned Australian company, we are committed to serving our customers and supporting our local community.
WEB LINK		Bostik Australia Smart adhesives are everywhere. For the Construction market, they are used to build or renovate the buildings where we live and work. Whether they're under the floors, behind the walls or used in the building's structure, it's almost certain a Bostik adhesive is close by.
WEB LINK		Bremick As the largest supplier of fasteners and hardware to the Australian and New Zealand building and construction industry, we offer an extensive product lineup including nuts, bolts, washers, stainless fasteners, socket screws, self-drilling screws, masonry anchors, rivets and stud bolts.
WEB LINK		Brighton Best International Brighton-Best International, Inc. (BBI), offers new products, more extensive inventory, world class service, quality products, and a 24 hr. online web ordering web site.

HBT TRADESHOW EXHIBITORS

WEB LINK



Cement Australia

Formed from a merger of Queensland Cement Ltd and Australian Cement Holdings, Cement Australia has a rich history dating back to 1890. From these humble beginnings, Cement Australia is now a leader in the Australian construction materials industry with a combined heritage of almost 200 years.

WEB LINK



Century Yuasa Batteries

Established in 1928, Century Yuasa Batteries has grown to become the undisputed market leader in the Australian Automotive battery market. With a workforce of 600 employees across the country, 35 distribution centers, and a cutting-edge manufacturing facility, Century Yuasa is dedicated to providing top-tier stored energy solutions to over 8000 resellers throughout Australia.

WEB LINK



Chemtools

& Greases, Cleaners & Degreasers, and a wide range of industrial maintenance products used in the Building & Construction, Automotive, Welding, Plumbing, Electronics, and Electrical industries.

WEB LINK



CSR

CSR is an iconic Australian and New Zealand brand and a market leader in both residential and commercial building products.

WEB LINK



CW Brands

Established in 1991, CW Brands supplies products for the hardware, industrial, automotive, painting, construction, agricultural, marine and mining industries

WEB LINK



Dawn Tools & Vices

Our objective is to provide our customers with high quality, high performance vices, clamps and associated handtools which offer superior value for money. It is our firm belief that our customers seek from us a service which goes beyond the product itself. We will anticipate correctly, future market requirements and provide competitive service to customers

HBT TRADESHOW EXHIBITORS

WEB LINK



Diggers / Recochem Inc

Our products aren't just tried, tested and proven effective, they're also multi-functional. Forget carrying a big bucket of products around to do all the jobs in and out of the home. DIGGERS™ cleaners and solvents are diverse and have several uses. Not just "the metho under the sink", they're everything you need for a well-looked-after home.

WEB LINK



Dingo Cement

Dingo Cement, an Australian-owned company, boasts a rich history of over two decades in the field of cement dry mix manufacturing, packaging, and material sourcing. We have established ourselves as a trusted partner for major hardware retailers and the building industry. Our Dingo and MaxPRO brands position us as leaders in the building supplies market, catering to both professional builders and enthusiastic DIY consumers. We are committed to introducing ground-breaking products to the market.

WEB LINK



Dressed Timber Products / Lindsay Meyers

DTP is a wholesale timber business which specialises in two main areas; supplying Education Institutions and F27. DTP is a major supplier of timber materials to Education Institutions (public and private high school Manual Arts Departments) and others facilities such as SkillsTech Australia and TAFE Colleges. DTP also wholesales F27 KD Hardwood to timber merchants throughout South East Queensland.

WEB LINK



DTA Australia

Established in 1976, DTA is engaged in the manufacture, importation and distribution of quality tools, profiles and machinery for the wall and floor market. In operation for more than 45 years DTA has been the market leader and trusted name in the tiling industry nationwide.

Our extensive range of DTA branded products are well known throughout the industry, however we also have distribution agreements with many leading International brands from around the world.

WEB LINK



Dy-Mark Australia

Dy-Mark has been a strong and trusted brand in the market of consumable products for almost 60 years. Our product range includes marking aerosol/bulk paints, inks and dyes, industrial markers and stencilling products, metal protection, protective and decorative coatings, cleaners and solvents and industrial packaging products.

WEB LINK



Dynamic Solutions

We are an IT company in Melbourne and have provided professional and reliable IT services to small and medium businesses for over 10 years.

HBT TRADESHOW EXHIBITORS

WEB LINK

**Electaserv**

Electaserv Trading

ELECTASERV TRADING (Electrical Agencies Pty Ltd) imports and wholesales power tools, household cleaning products, DIY products, hand tools and general hardware items. Electaserv products are currently represented in over 3000 stores nationally which include all the major Hardware, Industrial, Automotive and Grocery retailers

WEB LINK

**Excision**
Dependable Precision

Excision

We support Australia's manufacturers and metal processors to operate at their best, serving clients across consumer goods, construction, mining, automotive, aerospace, renewable energy and more.

WEB LINK

**FASTAID**
First Aid...for life

Fastaid

FastAid is a leading specialist in supplying innovative first aid, emergency and medical solutions to a large re-seller network Australia Wide. Our family owned and operated business has achieved an excellent reputation by providing a very high level of reliable service, quality products and dedication to our customers needs. Our team of willing experts have extensive product knowledge and a clear understanding of the workplace OH&S Regulations Australia Wide.

WEB LINK

**FILL**
THE PALLET

Fill The Pallet

Since 2012, We (Fill the Container) have been the direct link between factories and retailers in the industry of hardware tools and home improvement. A new effective and efficient pattern of sourcing qualified products, offering independent retailers factory direct price with small MOQ (Minimum Order Quantity) has been established.

WEB LINK

**FIX-A-TAP**

FIX-A-TAP

FIX-A-TAP is celebrating 50 years of being Australia's premier supplier of plumbing spares, providing great value solutions to your plumbing problems.

WEB LINK

**Fletcher Insulation**
Building Better, Together

Fletcher Insulation

we're dedicated partners in building a better tomorrow. With cutting-edge insulation and an unwavering commitment to innovation, delivered with simplicity, we pave the way for a seamless integration of solutions in construction projects, creating a more efficient and sustainably built environment

WEB LINK

**FORESIIGHT**
INFORMATION INNOVATION

Foresight Software

We've been helping Australian businesses to grow and become more profitable since 1981. From our head office in Brisbane, we partner with growing businesses Australia-wide to deliver our market-leading software solution ProfitPlus.

HBT TRADESHOW EXHIBITORS

WEB LINK



ForestOne

ForestOne is Australia's largest independent distributor of plywood, timber, laminate and decorative surface materials for sustainable interior design. We're an Australian-owned company with a strong focus on providing ethically sourced building products that enable architects and designers to Specify Responsibl

WEB LINK



Fosroc

Fosroc is a world leader in construction solutions. Since the company's beginnings over 80 years ago, Fosroc has developed into an international leader in delivering construction solutions for virtually any building or infrastructure project. New or old construction, above or below ground, we combine high quality products, expert technical support, customer service and innovation to give you the best solution for your project.

WEB LINK



GAF Control Sales

GAF since their establishment in 1959 has become one of Australia's leading suppliers of small electrical appliances, whitegoods, power accessories, heating, cooling, audio, personal care and lighting. After firmly earning themselves a place in the industry from initially supplying lighting products to the Australian market, GAF has continued to diversify and broaden their product portfolio to ensure that they stay competitive and remain delivering quality products to their customer base.

WEB LINK



Gainsborough

Gainsborough offers the complete solution for your door hardware needs. From the front to the back of the house or development, we have all the products you need to complete your project.

WEB LINK



Galintel

Manufactured in Australia for over 40 years, Galintel® has built a reputation for innovation and excellence and is the industry leader for lintels that are smarter, stronger, more durable and ultimately safer. Galintel® works extensively with industry stakeholders on the development of lintels and all our products undergo independent testing and appraisal ensuring they comply with the requirements of the Building Code of Australia and relevant Australian Standards

WEB LINK



Gamer Industrial Supplies

Gamer has been an importer and wholesale distributors in Australia since 1973. From the distribution of automotive tools, engineering products, storage systems, LED torches, Gamer is focused on quality products, customer satisfaction and fast delivery. With the second generation of the Gamer family now at the helm, Gamer has distribution warehouses in Brisbane, Melbourne and Perth

HBT TRADESHOW EXHIBITORS

WEB LINK



GARDENA®

GARDENA / Neta

GARDENA is a trusted brand in garden care and maintenance for millions of people around the world. GARDENA brings more than 50 years of gardening innovation and know-how and a complete range of clever products and solutions to all people looking to take better care of their gardens, balconies, patios or other outdoor areas.

WEB LINK



Gorilla Ladders

After entering the market in 2005 as a ladder brand, Gorilla brand has grown and expanded to include a diverse range of products including lifting and rigging equipment, height safety equipment, industrial scales, formwork props and manual handling equipment.

WEB LINK



H.B. Fuller

H.B. Fuller

Australians have relied on H.B. Fuller to stick down, fill in and seal up their projects since 1976. We've built our brand in the trade by partnering with Australia's leading hardware and construction outlets to supply products formulated to withstand Australia's tough climate.

WEB LINK



H.M. Cowdroy

With a large catalogue which includes door track systems, stops, guides and spare parts, door furniture, glass shelving systems, shopfitting products and showcases, Cowdroy provides products for a wide range of applications.

WEB LINK



Hartman Group

Our leading brands are household names offering quality, value for money and functionality. Some of our brands include: Hartman Furniture, Hartman Pet products, Gorilla Ladders, Gorilla lifting gear, Gorilla work and leisure wear, Rhino Ladders, Rhino lifting gear, Polar double-glazed windows and doors, screen doors and aluminium shutters, and Shelter Logic temporary shelters and greenhouses.

WEB LINK



Haymes Paint

Born in Ballarat in 1935, our business is the result of Henry Haymes' passion and his desire to provide quality, innovative paint and coating products to Australians. The business has been passed through the generations, with each Haymes family member contributing to our long-standing history of creating quality products.

WEB LINK



HEMPEL
Trust is earned

Hempel (Wattyl) Australia

Our coatings are essential to our customers' businesses. They help minimise maintenance costs, improve aesthetics, reduce waste and increase energy efficiency. They are also essential to sustainability, as they extend the useful lifetime of the assets they protect - helping lower the asset's carbon footprint across its entire lifecycle.

HBT TRADESHOW EXHIBITORS

WEB LINK



HiKOKI / Metabo

We have been designing and developing high performance power tools for over 70 years. Over time, our Japanese engineers have utilised their technical knowledge, skills, and experience to constantly improve our power tools. Guided by Japanese design principles, every element of our products is carefully chosen to improve performance, balance, usability, longevity, and control.

WEB LINK



Hobson Engineering

Established in 1935, Hobson Engineering is a family owned and operated business that has grown to become Australia's leading wholesale supplier of quality fasteners, bolts, nuts, allthread rod, screws, and anchors to the mining, construction, oil, and manufacturing industries. Hobson Engineering offers the highest quality fasteners, along with a commitment to large stock holdings and excellence in customer service.

WEB LINK



Hot Devil & Naleon Products

At Hot Devil, we have focused our energy on creating a high-quality range of gas torches and soldering irons. We work tirelessly to improve our specialty products, aiming to meet the needs of the Australian market. Since 1999, our family-owned business has worked with a huge network of retailers to ensure every Australian has access to the highest quality products available

WEB LINK



A brand of **legrand**

HPM

HPM continues its legacy of innovation and quality, offering a diverse range of products designed to simplify life at home while ensuring electricians have reliable solutions they trust.

WEB LINK



Hume Doors & Timber

Doors and manufacturing excellence are at the heart of everything we do. Each door we build, every innovative product we create, and each forward step we take is driven by our relentless pursuit of perfection. Our legacy spans over 70 years and tells a story of visionary individuals, courage, and commitment. It all began with Don Buckley and continues to this day with the same passion and dedication that shaped Hume into a trusted industry name.

WEB LINK



Hurford's

Our journey began with modest operations, which have since grown to match and often surpass both Australian and international competitors. Today, we stand as a comprehensive industry leader, encompassing the full spectrum of timber production - from primary producer to manufacturer and wholesaler.

HBT TRADESHOW EXHIBITORS

WEB LINK



Promotional Merchandise

Image Worx Promotional Merchandise & Uniforms

As a leader in branded merchandise and uniform solutions, we've built our reputation on a strong foundation of creativity, deep industry knowledge, and an unwavering commitment to quality. From small businesses to global enterprises, we deliver memorable promotional products that help brands of all sizes stand out in a crowded marketplace.

WEB LINK



IndiHub

IndiHub

IndiHub brings together a huge range of services, solutions and support, industry experts, along with Independent Retailers from all over Australia. For any Independent Retailer who is keen to gain a competitive advantage over their rivals, IndiHub is the place to be.

WEB LINK



Innova

Since the acquisition of the BGC plasterboard and fibre cement businesses by Etex, we have been working hard to create a new brand for Innova fibre cement. The new logo and vibrant corporate colours embody the spirit of innovation and change we embrace and build our business on.

WEB LINK



Intech Tools

At the heart of our enterprise lies our state-of-the-art manufacturing facilities, where meticulous craftsmanship converges with cutting-edge technology to produce an array of impeccable tools. Among our offerings, we specialize in crafting precision tools such as squares, calipers, measuring tools, stamps, vices, and an assortment of work-holding tools. Our expertise also extends to curating an assortment of top-tier cutting tools, including magnetic drill cutters, drills, taps, dies, and more

WEB LINK



ITI Australia

ITI Australia

ITI is a privately-owned Australian company with a very proud history of sourcing and supplying wholesale timber and building products to the market place. Through innovation and going beyond the norm, ITI has grown to be the largest independent distributor of timber products in Australia, delivering products to all corners of the country.

WEB LINK



ITM

ITM are a leading national wholesale tool supplier servicing the Industrial, Trade, Hardware and Automotive retail markets Australia wide, specialising in fabrication and workshop equipment, metal cutting and drilling, cutting tools, air tools and powered equipment.

HBT TRADESHOW EXHIBITORS

WEB LINK



JAK MAX

JAK Max is a wholesale spare parts & whole goods supplier for the Outdoor Power Equipment Industry with a genuine love for the industry and the people in it!

WEB LINK



Jiwa Financials

Jiwa software is designed to benefit and support you in your role and increase your business success. We strive to deliver a system that meets the needs of business at multiple levels, so you can have the detail you need to measure and achieve your targets.

WEB LINK



Josco Australia

Catering to DIY customers, trade professionals and the industrial market, Josco's comprehensive product range encompasses wire brushes, abrasives, polishing products, hand and engineering tools, lubrication equipment, plus an array of brooms & cleaning supplies and much more

WEB LINK



Kincrome

We pride ourselves on being 'product people'. Key to our longevity and success has been product innovation. Our team works alongside local trades to understand how tools can be developed and modified to help them work better.

WEB LINK



Klein Tools

Klein Tools doesn't just make great products; Klein Tools makes great products that stand up to the demands of the professionals who use them every day. Because our standards are high as yours, we demand that every one of our hand tools delivers all the performance, durability and precision that you need to get the job done right.

WEB LINK



Klingspor Australia

From professionals for professionals. We carry more than 50,000 tools for all your grinding, cutting, milling, polishing and stock removal needs. The breadth and depth of our product range offers the right tool for your specific requirements - often even with a variety of different options.

WEB LINK



Ladder Solutions

We pride ourselves on having high quality ladders, made from Structural grade aluminium which gives you high strength yet light-weight components coupled with the fact that all aluminium components are Anodized for superior corrosion resistance and a clean to the touch finish, Indalex ladders are ladders you can rely on.

HBT TRADESHOW EXHIBITORS

WEB LINK



Laserlite Building Products

Laserlite Building Products Services all regions across Australia with 10 Distribution centres, 2 Fibreglass Manufacturing Plants along with a large National reseller network stocking market-leading roofing brands including Laserlite® Polycarbonate and Topglass® Fibreglass sheeting.

WEB LINK



LevelMaster

An Australian owned company, LevelMaster improves the time and cost of levelling a house. When the ground moves you need to go back in and adjust the levels otherwise you get cracks in your walls, and the doors jam. LevelMaster house stumps have an in built retainer nut providing a quick and inexpensive fix to that problem.

WEB LINK



Lusion

Lusion is a major importer and Distributor of Lighting and associated Electrical products, specialising in energy efficient LED Lamps and Luminaires. Lusion brings to the Australian market the latest technology in LED through close cooperation with our major partner in China, distributing products nationally with the support of the Australian Electrical Wholesale and Lighting Industry.

WEB LINK



Lysaght

For over a century, Lysaght has been synonymous with quality and reliability in Australia's steel building industry. As part of BlueScope, our extensive range of roofing and walling solutions, including the iconic CUSTOM ORB® profile, offers unparalleled performance for both home improvement and large-scale commercial projects.

WEB LINK



Macnaught

Macnaught Pty Ltd, a privately owned company established in 1948, has been designing and manufacturing premium quality fluid measurement, fluid transfer and lubrication equipment for the agricultural, automotive, industrial, mining and transport industries across the globe for over six d

WEB LINK



Macsim

Macsim Fastenings is one of the few, truly Australian owned fastening companies in the country with branches operating in Sydney NSW, Melbourne VIC, Brisbane & Townsville QLD, Perth WA, Adelaide SA. Macsim also has a fully operational branch in Auckland,

HBT TRADESHOW EXHIBITORS

WEB LINK

Makita



In 2005, we led the industry in incorporating lithium-ion batteries into our power tools. Since then, we have been developing products that take advantage of industry-leading recharge-control and motor technologies. We have the industry's best lineup of cordless tools for which the same battery is interchangeable with all tools. Our strengths lie in wide-ranging product categories that accurately meet user needs.

WEB LINK

Mapei Australia



Mapei is now among the world's leading manufacturers of chemical products for the building industry. We offer long-lasting high-quality products that are mindful of both the planet and people. We draw on this same expertise to contribute to the most important architectural and infrastructural works globally, including projects in the housing industry and renovation of historic buildings.

WEB LINK

Masport



Masport delivers a range of quality lawn and garden products including lawnmowers, ride-on mowers, cultivators, shredders, patio heaters and BBQ's. Find out about the features of Masport's great products by selecting a product category below.

WEB LINK

Maxisafe



At Maxisafe, we are dedicated to protecting Aussie workers' well-being and building a stronger safety culture by making the workplace safer, healthier, and more productive. We all have the right to be safe at work.

WEB LINK

Mayo Hardware



Mayo Hardware has been a trusted name in the industry for over 100 years, delivering high-quality products. Established in 1920, we began as a small hardware supplier and have grown into a leading distributor and manufacturer across multiple categories, including home and garden, safety, outdoor living, and trade.

WEB LINK

Medalist



Medalist are wholesalers of Tools, Power Tool Accessories, Hardware, Gardening, Household, Equipment & Supplies to a variety of Hardware, Industrial, Building & Construction, Auto & Horticultural retail stores Australia wide

WEB LINK

Merlin Software



The only retail management system in Australia that sets the standard for exceptional and ongoing support, now and forever.

HBT TRADESHOW EXHIBITORS

WEB LINK



Meyer Timber

Meyer Timber has become one of the largest timber wholesale operations in Australia and continues to grow

WEB LINK



Mocare Australia

Mocare Australia is proud to Manufacture, Import and Distribute exclusive brands in many categories of Automotive and Hardware ranges. At Mocare we believe the key to our success is to help other independent businesses grow their sales and profit by providing top selling brands, that are not featured in Multi National competitors stores such as Bunnings and Supercheap.

WEB LINK



Monarch

Our brand Monarch is renowned for its handcrafted paintbrushes and continues to drive the evolution and development of the Australian paint accessory market. Whether you are a professional trade painter or DIYer, Monarch will have the right painting tool for your next painting project.

WEB LINK



National Timber & Hardware Association

The National Timber & Hardware Association (NTHA) is proud to represent over 700 members across Australia from the timber, hardware, and building materials industries. The Association was created after the successful merger of the Timber and Building Materials Association (TABMA) and Hardware Australia in March 2023.

WEB LINK



Nemtek Electric Fencing Products

Keeping animals contained and safe, as well as keeping property and people secure is no easy task. You want a brand you can trust with a wide range of products and services that are cost effective, quick to install and easy to use. Nemtek's range of products deter feral animals successfully and with minimal effort thus protecting your livestock and pets.

WEB LINK



Neove Pharma Australia

dedicated to animal health, building success by supplying high quality and affordable veterinary products;

WEB LINK



NORMA Group

NORMA Group is an international market leader in engineered and standardized joining and fluid-handling technology. We support our customers and business partners in responding to global challenges such as climate change and the increasing scarcity of resources. Welcome to NORMA Group.

HBT TRADESHOW EXHIBITORS

WEB LINK



OX Tools

Since 2010, its No Bull that OX Tools has become one of the fastest growing hand tool brands in the world. Committed to LIVING THE TRADE, we engineer dynamic solutions, enhancing on-site efficiency and making OX the tool of choice for the toughest PRO. Its our mission to unleash the power & potential in every tradesperson.

WEB LINK



Pacific Gas

Pacific Gas provides a smarter way for you to service your customer's industrial gas needs. At Pacific Gas, we are a customer-focused industrial gas supplier offering a wide range of high-quality gas products without lock-in rental contracts for retail and industrial gas industry outlets around Australia.

WEB LINK



Paslode

Paslode continue to demonstrate why they're ahead of the curve when it comes to nailing innovation. Its latest iteration of the Straight TrimMaster doesn't just take its cladding to another level, but adds in new flavour for steel fix outs too.

WEB LINK



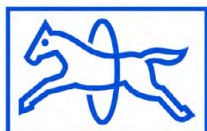
PERFORMANCE
MEMBRANES

Performance Membranes Australia

We're Australia's only dedicated distributor of Pro Clima products and accessories. Daily deliveries from our Melbourne and Brisbane warehouses mean you get the products you need when you need them.

WEB LINK

PFERD



TOOLS

PFERD Tools

PFERD TOOLS is synonymous with high-quality, precise and innovative tools with the wow factor. We've been developing solutions for work on surfaces and for cutting and machining materials since 1799. Our vision is to pave the way for your success

WEB LINK



Pinewood Products

Pinewood Products is a family-owned manufacturer of quality treated pine products, servicing Australian merchants, wholesalers and larger contractors for over 30 years. Located on the Gold Coast at a historic local sawmill site, Pinewood Products are a team of 28 including tradespeople, an amazing admin team and a haul of delivery trucks to support our clients all over Australia.

HBT TRADESHOW EXHIBITORS

WEB LINK



PIP Global Safety

PIP Global Safety® is the new independent global leader in personal protective equipment - trusted for over 40 years by workers and safety professionals worldwide. With deep expertise in hand protection and a portfolio of iconic brands - including G-Tek®, North®, Howard Leight™, Boss®, and Miller® - we deliver head-to-toe safety solutions across every major industry.

WEB LINK



Porta

Specialising in high-quality timber products, we serve the home improvement, building, trade, and commercial sectors with unmatched craftsmanship and innovation.

WEB LINK



Portwest

Portwest is a global manufacturer and innovator of workwear, safety wear and PPE. Established in 1904, Portwest today has a global distribution network and customer service staff in over 130 countries. The company is a family-owned business and continues to be managed by the 3rd generation of the Hughes Family and since 2015 the 4th generation of the family have joined the business. Innovative production and design by an in-house team of experts lies at the heart of the Portwest advantage

WEB LINK



Power DC

Power DC (PDC) is a privately held company based in Melbourne Australia. Established in 1986, PDC began as local distributor of primary batteries and quickly grew into a national distributor with representation in every state.

WEB LINK



PPG

PPG is a global team of innovators, achievers, and partners united by the single belief that our paints, coatings, and specialty materials enrich lives. Together, we protect and beautify the world.

WEB LINK



Pro-Kit

Pro-Kit has an extensive branding program in place that can add value to your product range and boost your sales. Our modern warehouse facility at Minto in the southwest of Sydney can service all of our customers needs from small businesses to National Chains

WEB LINK



RapidTool

RAPIDTOOL is Australia's premier supplier of rebar and concreting equipment, with over 12 years of experience in the industry.

HBT TRADESHOW EXHIBITORS

WEB LINK



RedCat - Build with Quality

RedCat has a proven 30 year+ track record of "Build It with Quality" products. RedCat will compliment your current product range, ensuring the customer finishes that project without having to venture anywhere else.

WEB LINK



Reln

RELN is a second generation Australian-Owned family business that has been operating for almost 70 years. As an established and trusted brand, we design and manufacture multi-award winning, quality endorsed products for the Australian and international markets, exporting to over 20 countries globally.

WEB LINK



Richmond Rolling Solutions

Richmond Rolling Solutions is the new name for the Australian family-owned and operated company that has been supplying wheels, castors, material handling equipment, and so much more to Australian businesses for over 65 years.

WEB LINK



Romak Hardware

For over 25 Years, Romak Hardware Distributors has become an Australian industry- leading hardware supplier, distributing our extensive range of products both nationally and internationally.

WEB LINK



RWC

RWC is a powerful family of brands with a reputation to match. Passing down over 70 years of innovation, we strive to shape a better world by continuously creating breakthrough products to make customers' lives easier and more efficient.

WEB LINK



Sabco

Cleaning is personal - there is no one right approach. We may all be different, and we may all clean differently, but there is one thing we can all agree on - that a good clean matters! Sabco is for every Australian family!

WEB LINK



Saint-Gobain Abrasives

Saint-Gobain designs, manufactures and distributes materials and services for the construction and industrial markets. These solutions are found everywhere in our living places and our daily life: in buildings, transportation, infrastructure and in many industrial applications.

HBT TRADESHOW EXHIBITORS

WEB LINK



Selleys

Today, Selleys is a market leading brand with 75 years of world class quality and product innovation. Selleys growth in world markets is already evident with major trade extending in to New Zealand and Asia. In fact, Selleys has been exporting to countries such as Singapore, Malaysia, Thailand, Hong Kong, Korea, Taiwan, Indonesia, Vietnam, China, the Philippines, South Africa and Saudi Arabia for many years.

WEB LINK



Senix Australia

We've been designing and building the world's leading power tools for a long time, and, just like you - if it's not about power and durability, we're not interested. We break barriers and shatter expectations by manufacturing power tools and outdoor power equipment fuelled by continuous innovation and relentless passion.

WEB LINK



Sequence Rokset

With a rich heritage of over 150 years of combined experience, Rokset (100 years) and Sequence (50 years) joined forces in 2020 to deliver the finest application, preparation, and protection accessories across Australia. Quality is woven into the DNA of both the Rokset and Sequence brands, as well as the premium global brands we proudly offer.

WEB LINK



Sheffield Group

From our humble beginnings supplying razor blades to the Royal Australian Navy, we've evolved into a powerhouse renowned for our Culture of Care and Products that Outperform. Our journey has been one of adaptation, dedicated to providing cutting-edge solutions with hand tools, abrasives and power tool accessories.

WEB LINK



Shift

With Shift Trade, suppliers can minimise credit and payment risk, optimise order management processes and grow sales.

WEB LINK



SI Retail

SI Retail is a leading supplier of retail display solutions in Australia, offering a comprehensive range of data strips suitable for various shelving systems. Whether you're fitting out a supermarket, pharmacy, hardware store or convenience outlet, SI Retail provides durable, crystal-clear ticket strips that enhance your shelf presentation and streamline operations.

HBT TRADESHOW EXHIBITORS

WEB LINK



Simmonds Lumber

Simmonds Lumber is a premier timber wholesaler specialising in globally-sourced timber products for the housing industry, commercial construction, home renovations and industrial markets

WEB LINK



Soudal

Soudal Australia is proud to be part of the globally recognised Soudal Group—Europe's largest independent manufacturer of adhesives, silicone sealants, polyurethane foams, and high-performance bonding solutions. With over five decades of experience and a presence in more than 130 countries, we bring cutting-edge innovation, trusted quality, and tailored solutions to the Australian market.

WEB LINK



SPAX Pacific

There is no end to the things we can make with our own hands. But there is only one that keeps them together: SPAX is here to help you overcome every challenge. From small touch-ups to major projects, SPAX guarantees you will always achieve your goal.

WEB LINK



Spear & Jackson | QEP Australasia

The organisation has come a long way since 1760, and the Spear & Jackson Group now manufactures and distributes garden tools, metrology equipment, woodworking tools and magnetic equipment under several brand names

WEB LINK



Stanley Black & Decker

For us, being a leader in tools, engineered fastening and industrial equipment goes hand-in-hand with being a world-class innovator. In this extraordinarily fast-paced digital age, where others deviate from disruption, we embrace technological change as a way to make our products and business solutions that much better for our customers.

WEB LINK



Starrett

The L.S. Starrett Company, founded in 1880, manufactures more than 5,000 variations of Precision Tools, Gages, Measuring Instruments and Saw Blades for industrial, professional and consumer markets worldwide.

WEB LINK



Sterland Computing

We've evolved into an organization that now serves the industry: from software tools, like Frameworks, developed to solve the specific needs of our industry, to consulting services, which focus on business improvement.

HBT TRADESHOW EXHIBITORS

WEB LINK



Stramit

We're one of Australia's leading manufacturers and suppliers of roll formed steel building products – and for good reason.

WEB LINK



Striven Software

We believe that when we remove the problems caused by unconnected or legacy software, we're not just helping your organization—we're helping people. Because your business is only as good as the people who work for you.

WEB LINK



Sunrise Hardware & Garden Products - RALLY

We are a proud Australian family-owned business that has been distributing a broad range of Hardware, Building, Rural and Garden products since 1983. That's right over 40 years!

WEB LINK



Sunstate Cement

Proudly Australian owned and Queensland made, Sunstate Cement Ltd. is one of Australia's leading manufacturers and suppliers of high quality cement products to commercial businesses throughout Queensland and northern New South Wales.

WEB LINK



SuperSleepers

SuperSleeper is a pioneering and innovative manufacturer, leading the way in the retaining wall industry within Australia. Committed to excellence, SuperSleeper has introduced a game-changing product that transforms the traditional concept of retaining walls.

WEB LINK



Sutton Tools

Sutton Tool's state-of-the-art production processes begin with raw material preparation. High-speed steel is imported from France and Austria, as Sutton Tools has found the quality of this European-manufactured steel is superior to raw material sourced from Asia. This steel is processed to workable length & diameter, then turned, using computer controlled machines that are able to complete a number of turning operations in a single manufacturing stage.

WEB LINK



Sympac Solutions

we cater for the needs of the buying groups by finding out what information and communication they require from their members in order to analyse the performance of the group, monitor their results, highlight issues, and have the data necessary to make educated management decisions as required to improve their service to members and the overall results for the group.

HBT TRADESHOW EXHIBITORS

WEB LINK



THE TOOL GROUP

The Tool Group

Our portfolio of brands which we represent have global heritage and have been distributed throughout the world for over 75 years and are now major brands featured in over 80 countries. Our brands are recognised for their innovation, design and quality, delivering best products and solutions to automotive, industrial, mining sectors, agriculture, hardware, building, construction and trades.

WEB LINK



Thunderbird Ag

Thunderbird have a small but very dedicated team who are passionate about delivering quality, value for money products and providing our customers with the best possible service. Feel free to contact your Territory Manager at any time.

WEB LINK



Tilling Smartframe

The company supports and distributes its own unique range of Engineered Wood Products known as SmartFrame. Products in this range include SmartJoist I-joists, SmartLVL, SmartLam glued laminated beams; all able to be designed and specified with the state of the art SmartFrame software program and SmartFrame Design Compendium technical library. A fully automated SmartFrame cutting system can provide cut to length options and pre-cut web penetrations.

WEB LINK



ToolHub

ToolHub is a newly formed distribution business which began mid 2020, servicing independent retailers, industrial wholesalers and general building suppliers across Australia. We are a trading business of Rushmore Distributors, with sister company Repelec (Aust) the market leader in supplying tools and hardware to the electrical & plumbing wholesale markets.

WEB LINK



Tradeware

Our decision to decentralise our warehouses and teams has proven to be one of our greatest strengths. Australia is a huge country with diverse needs, our local teams have great relationship with their retailers. They know what is needed in their region and how to best meet the needs of their customers.

WEB LINK



Tridon Australia

Tridon Australia was incorporated in 1976 to specialise in the distribution of products to the industrial and automotive markets. It is a 100% Australian owned and managed company.

HBT TRADESHOW EXHIBITORS

WEB LINK



Trio Australia

Trio Group Australia ("Trio") is a customer centric and reliable hardware solutions provider that sources and distributes door hardware, plumbing and gardening products across Australia, New Zealand, the Pacific Islands, Europe, United Arab Emirates and the world over.

WEB LINK



Uni-Pro Painting Equipment

Every painter, regardless of skill or experience, strives to achieve perfect results. Not only does UNi-PRO assist painters to reach their goals by supplying no-nonsense products at a reasonable price. But it also offers practical online resources to help users 'Paint Like a Pro'. These resources include 'How To' videos and guides, detailed information sheets, as well as Materials Safety Data Sheets (MSDS) and product overviews.

WEB LINK



Urban Direct Wholesale

High Quality Outdoor Living Products and Composite Decking Wholesale Distributors with the mission to make your Australian outdoor life more enjoyable.

WEB LINK



Vespol

We have representatives in Sydney, Brisbane and Perth. Our products are manufactured at our Sydney warehouse and distributed to a range of retail outlets in Australia

WEB LINK



Vida Wood

Vida is a global supplier of manufactured products from sustainable Swedish forests. The group employs 1,350 people in 23 production plants, including twelve sawmills. The operations are strategically located close to forest landowners in the counties of Småland, Skåne and Västra Götaland in Sweden. Production is mainly focused on structural timber for a variety of global markets. Seventy-five percent of Vida's sawn wood products are exported to Europe, USA, Australia, Africa and Asia.

WEB LINK



VUETRADE

The market leading VUETRADE range of Building Brackets, Timber Connectors, Coastal 316 Stainless Steel, Cyclonic and BLACKOUT powder coated ranges, is delivering on providing Innovative, Quality and Timesaving products to the building industry.

HBT TRADESHOW EXHIBITORS

WEB LINK



Wallboard Tool Company

In 1976 with 20 years industry experience Grahame Orchard launched Wallboard Tool Company as Australia's first specialised tool supplier for the plasterboard industry. His vision was to provide Australian plasterers with a comprehensive range of trade quality tools that included iconic brands like Hyde Tools, Wallboard Tools, Telpro Panellifts, Premier Taping Tools, Trim-Tex and many more.

WEB LINK



Weldclass

Weldclass is a national welding equipment brand. Weldclass products are developed for Australian welders and metal fabricators and are distributed through our network of over 1,000 dealers across Australia and the South Pacific region.

WEB LINK



Wesbeam

Using state of the art equipment from New Zealand, Japan, Finland and Germany, we manufacture high-quality laminated veneer lumber beams and other LVL products.

WEB LINK



White International

White International is a leading importer and distributor of high-quality Water and Tool products across Australia and New Zealand.

WEB LINK



Whites Group

Proudly Australian owned and built on down-to-earth family values, Whites Group has been supplying quality fencing and garden landscaping products for over 50 years.

WEB LINK



Wilmaplex

Wilmaplex is a leading manufacturer of builder's hardware in Australia, supplying an extensive range of timber connectors, fasteners, structural brackets and fixings for your build project.

WEB LINK



Woodhouse Timber

At Woodhouse Timber, we pride ourselves on delivering premium timber materials that combine durability, performance, and peace of mind. From the environmental protection of our Woodhouse Weatherproof range to the durable longevity of Woodhouse TerraFrame, each product is backed by a comprehensive warranty, ensuring reliability for years to come.

WEB LINK



Zanda Architectural

Zanda Architectural Hardware is a wholly Australian-owned designer, manufacturer and supplier of high-quality door handles & accessories.

FIND TRUE INDEPENDENCE WITH THE POWER OF HBT



At HBT, we bring together over 900 independently owned stores across Australia to create a powerful buying force.

For independent businesses, this means access to group **purchasing power, exclusive supplier deals, and tailored support** that puts them on equal footing with larger competitors. Through HBT, Members gain the benefits of a large network while **maintaining the flexibility and autonomy of an independent.**

➤ **Rebates from Every HBT Supplier:** Every HBT supplier contributes a rebate to purchasing members, ensuring you earn financial rewards on every order. Payments are made to members at the end of each quarter.

➤ **Enhanced Supplier Support:** Gain access to accredited Supplier Partners who provide field support specifically tailored to your businesses, ensuring your unique needs are met.

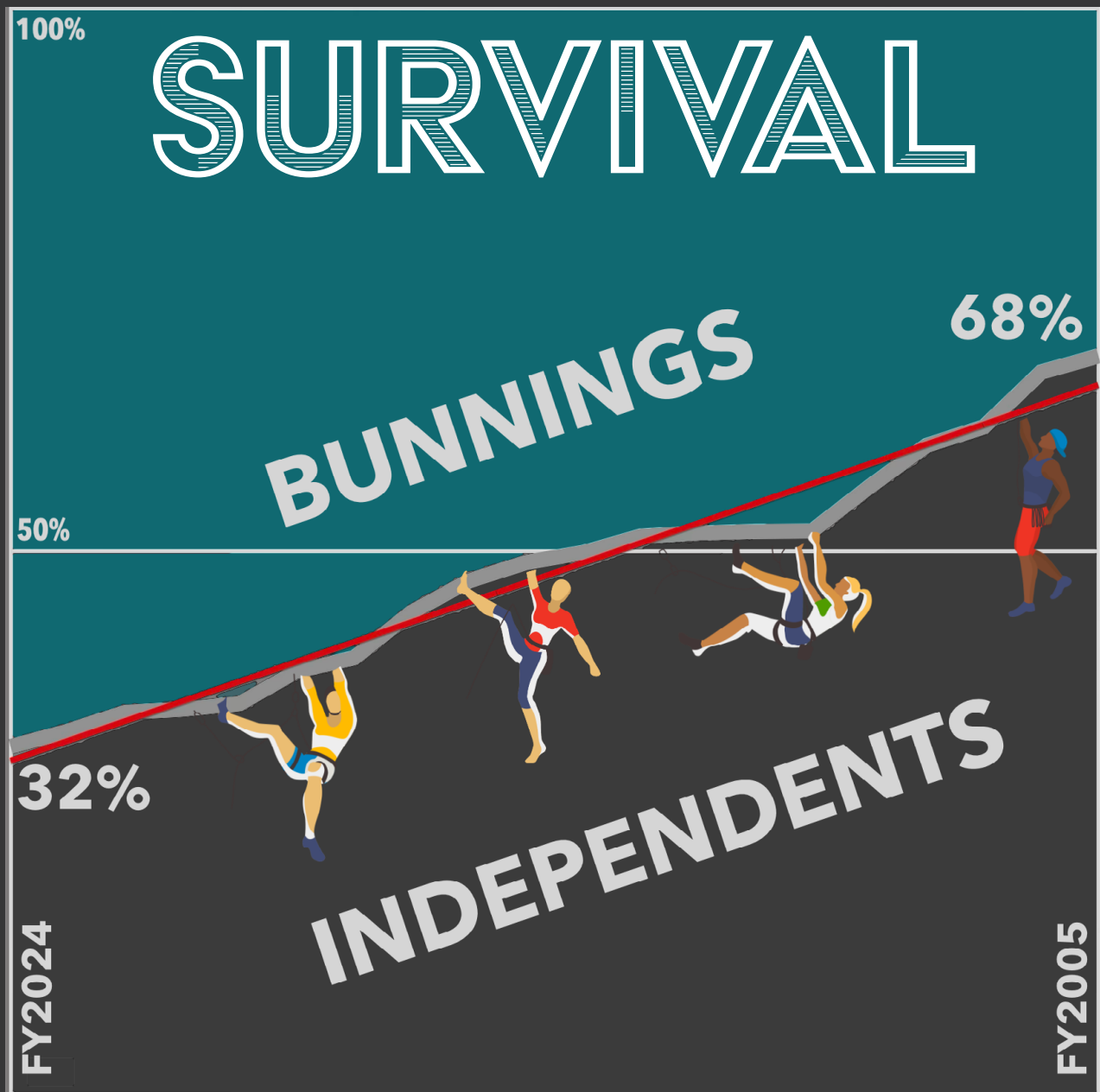
➤ **Access to Exclusive Deals:** Tap into a range of deals that are exclusive to HBT members, giving you a competitive edge in the market.

➤ **Business Support:** Benefit from HBT's expert business platform, MyHBT Portal, making it easier to manage supplier relationships, shop promotions and access a range of features to assist you in running your business.



POWERING TRUE
INDEPENDENTS

RETAIL SURVIVAL



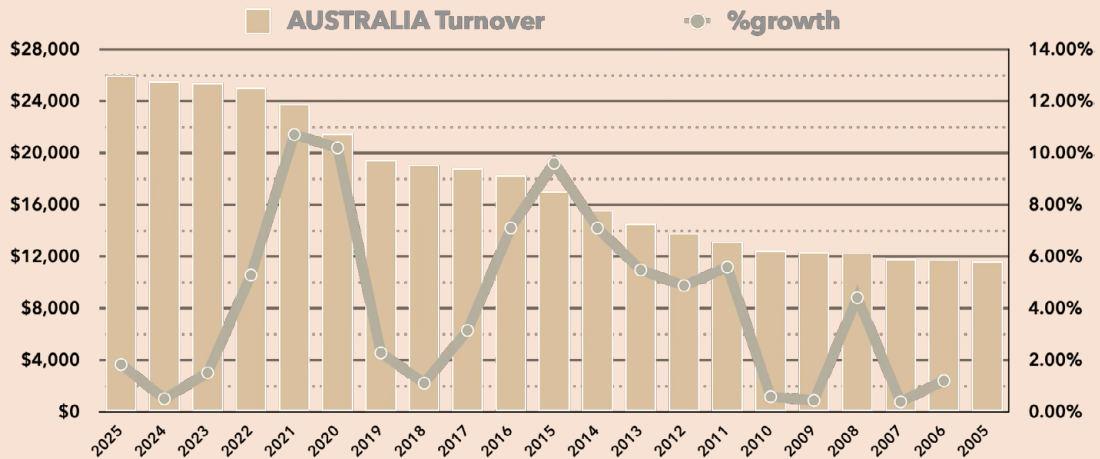
The Australian Bureau of Statistics (ABS) has cut off a valuable source of information for the hardware industry, namely its monthly retail turnover stats series. Its replacement, based on consumer behaviours, does not provide hardware stats. Instead, these are bundled into a set of general household stats. For industry purposes, this is all but useless.

Of course, the ABS is not itself really to blame. It faces ongoing reductions to its funding by the federal government. We'd like to say that is surprising, but in the 2020s it really isn't.

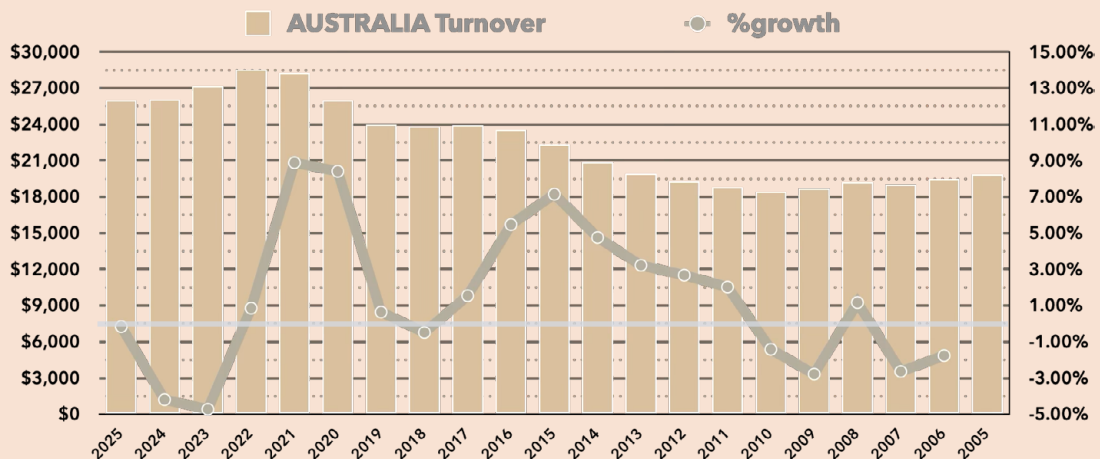
To make the most of the existing stats, we're going to delve a little deeper into the historical record, to see how retailing patterns have changed, and to suggest what we might expect in the future.

AUSTRALIA

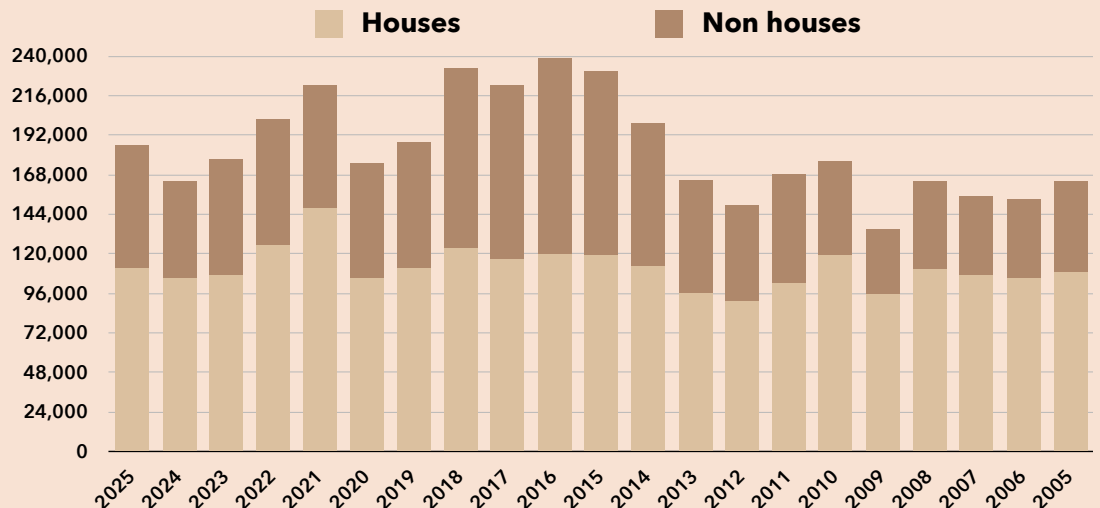
ABS: Hardware retail turnover: Australia
Original \$millions



ABS: Hardware retail turnover: Australia
Inflation-adjusted \$millions

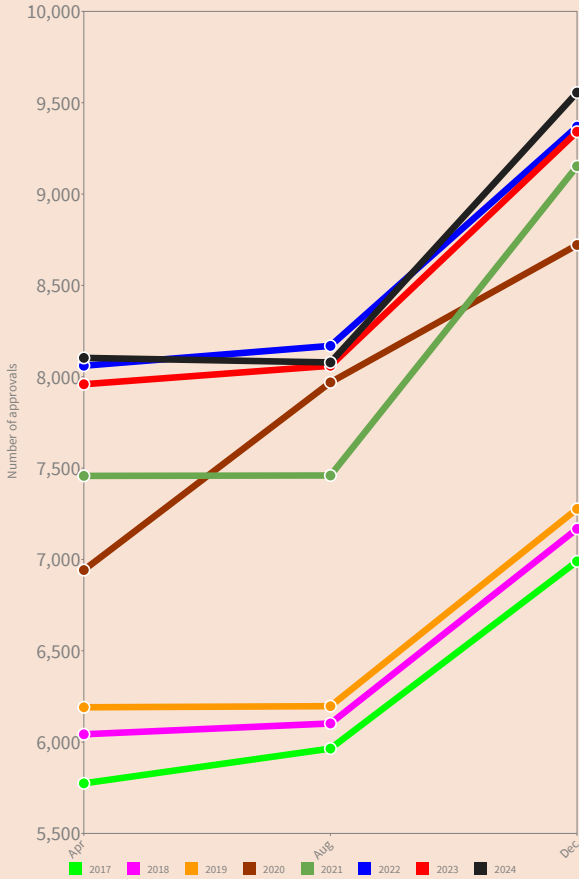


ABS: Building approvals: Australia
Number of approvals — financial years

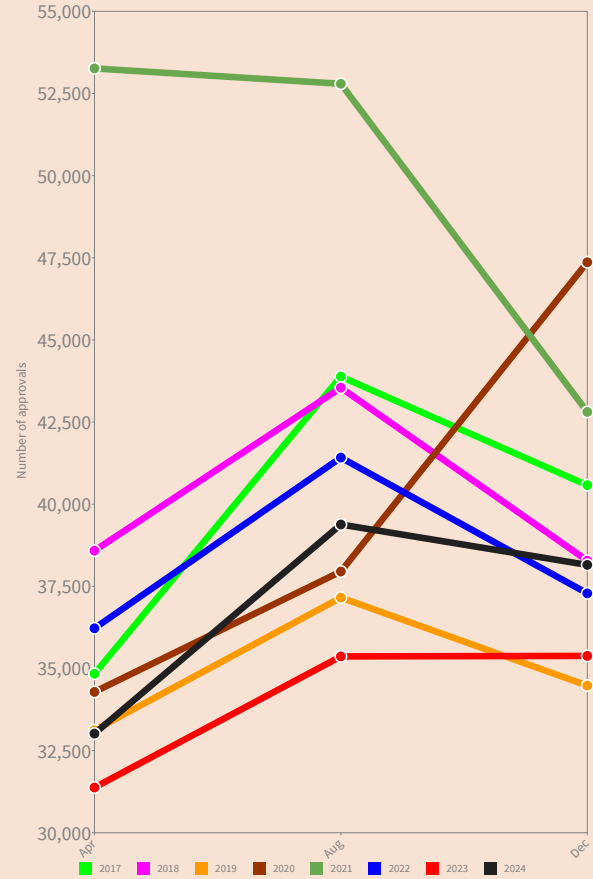


AUSTRALIA

ABS: Retail sales: Aust.
\$millions — Calendar years



ABS: Building approvals: Aust.
Number of houses — Calendar years



Previous page

As the charts on the previous page indicate, the high level of inflation during the post-COVID years gives rise to the phenomenon of increases in revenues post FY2022 in the original data, and declines in the inflation-adjusted data. All three post-COVID years were negative, though FY2025 shows this has stabilised.

Viewed over a span of 20 years, it becomes evident that Australia as a whole has gone through five stages of growth in hardware retail sales. In terms of inflation-adjusted data, the first stage, from 2005 to 2010 shows ongoing slight declines. This is followed by a steady increase from 2011 to 2016. The third stage, 2017 through to 2019, shows stability. The prime COVID years, 2020 to 2022 show significant increases. Finally, post-COVID, as remarked above, shows a decline.

It's interesting to note that if we compare the first four FYs of the series — FY2005 to FY2008 — with the most recent four years — FY2022 to FY2025 — there has been only a 4.0% increase in the cumulative number of building approvals for houses.

That's from 431,666 to 449,210 house approvals.

It's often suggested that this relates to high interest rates. However, during the older period, the average interest rate was 5.5%, with a minimum of 5.25% and a maximum of 7.25%. In the more recent period, the average was 2.9%, with a minimum of 0.10%, and a maximum of 4.35%.

Current page

The hardware industry in Australia has three seasons. There's the slow start, January to April, mid-year; May to August, heating up; and end-of-year, September to December, increasingly frenetic.

In this series of stats, we've matched the data points to those periods.

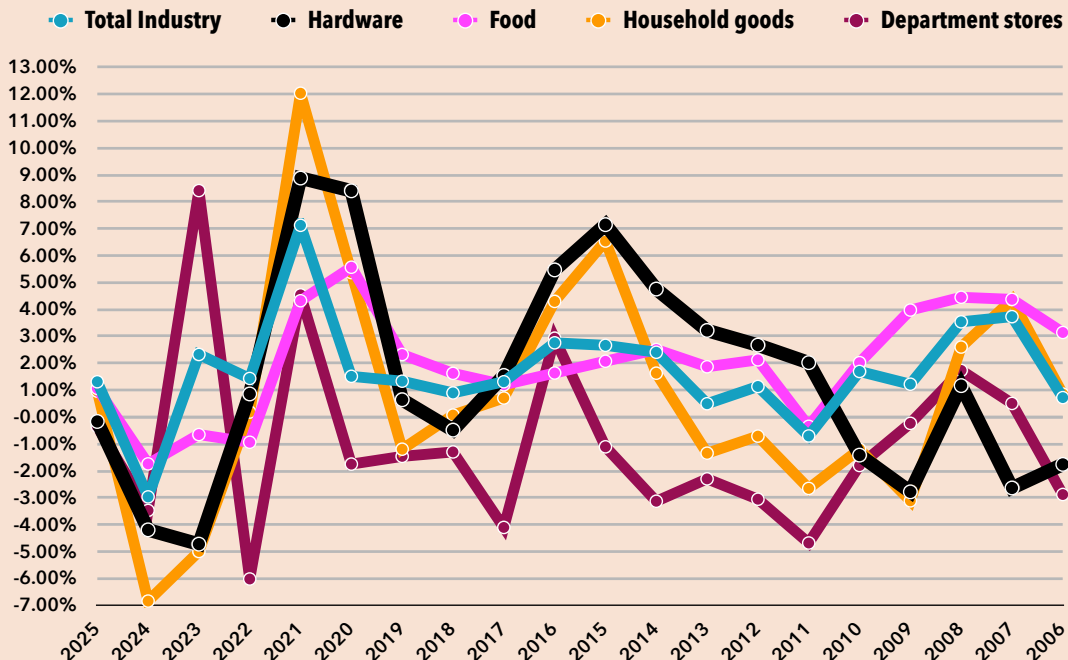
In the retail sales series (left) we can see very clearly three very similar pre-pandemic years, two transitional years (2020 and 2021), and three very similar post-pandemic years.

Building approvals show a different pattern. 2019 is considerably lower than the two prior years. 2020 jumps in its final period, followed by two very high periods in 2021. But both 2022 and 2024 are low, and 2023 shows as the lowest in this range.

AUSTRALIA

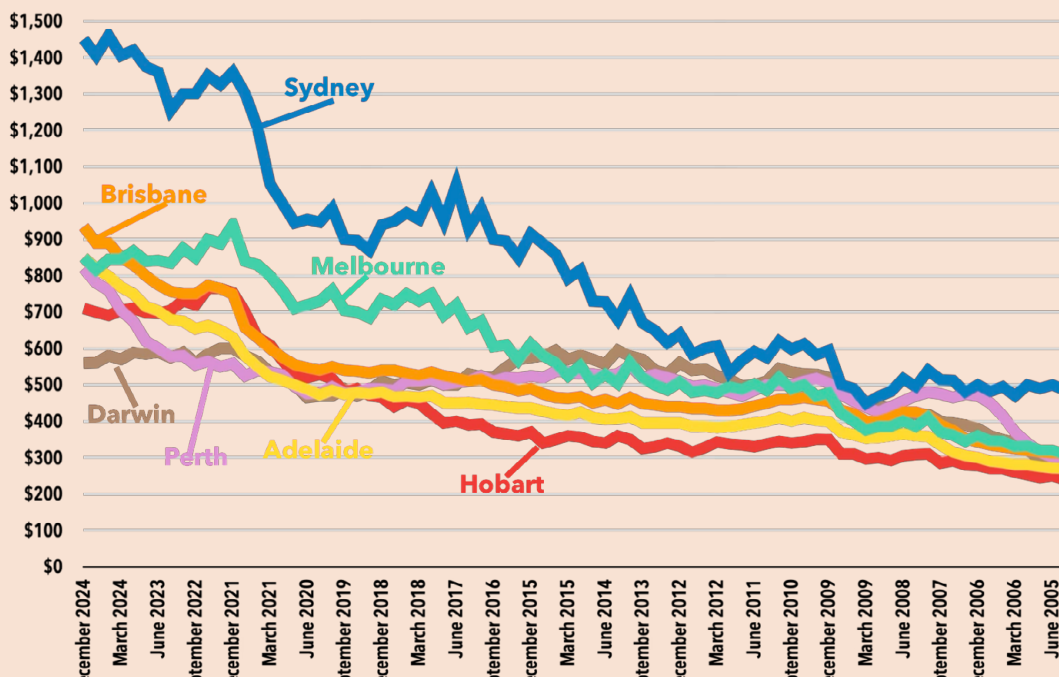
ABS: Retail turnover: Australia

Inflation-adjusted FY %growth



ABS: Median house prices, Capital cities

\$thousands

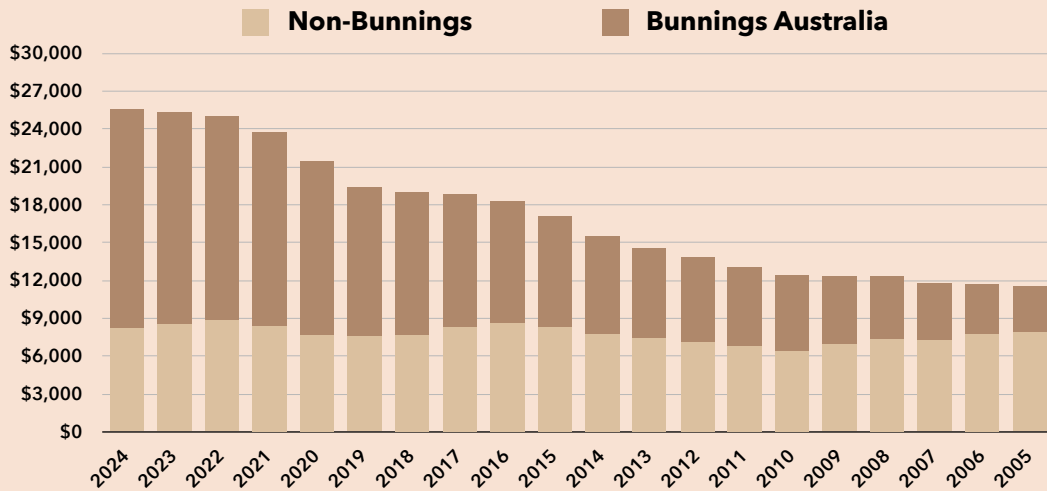


It's helpful to have some overview of retail in general in Australia. As the top chart shows, in growth terms hardware (the black line) outperformed overall retail (the blue line) from FY2011 through to FY2017, and again during FY2020 and FY2021.

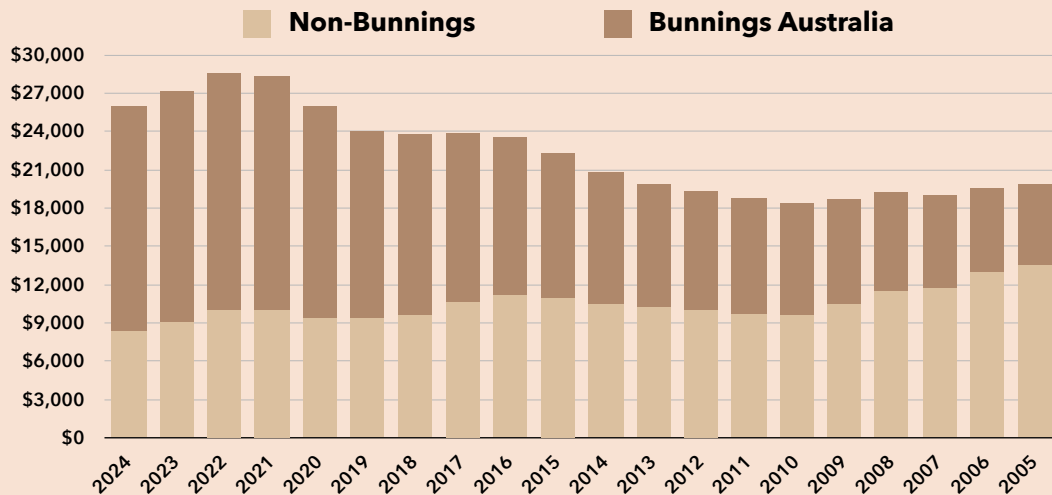
The median house price chart shows the exceptionalism of Sydney/NSW, but also the convergence in median price for Melbourne, Adelaide and Perth on \$800,000. This could be an indication of a national market emerging.

BUNNINGS

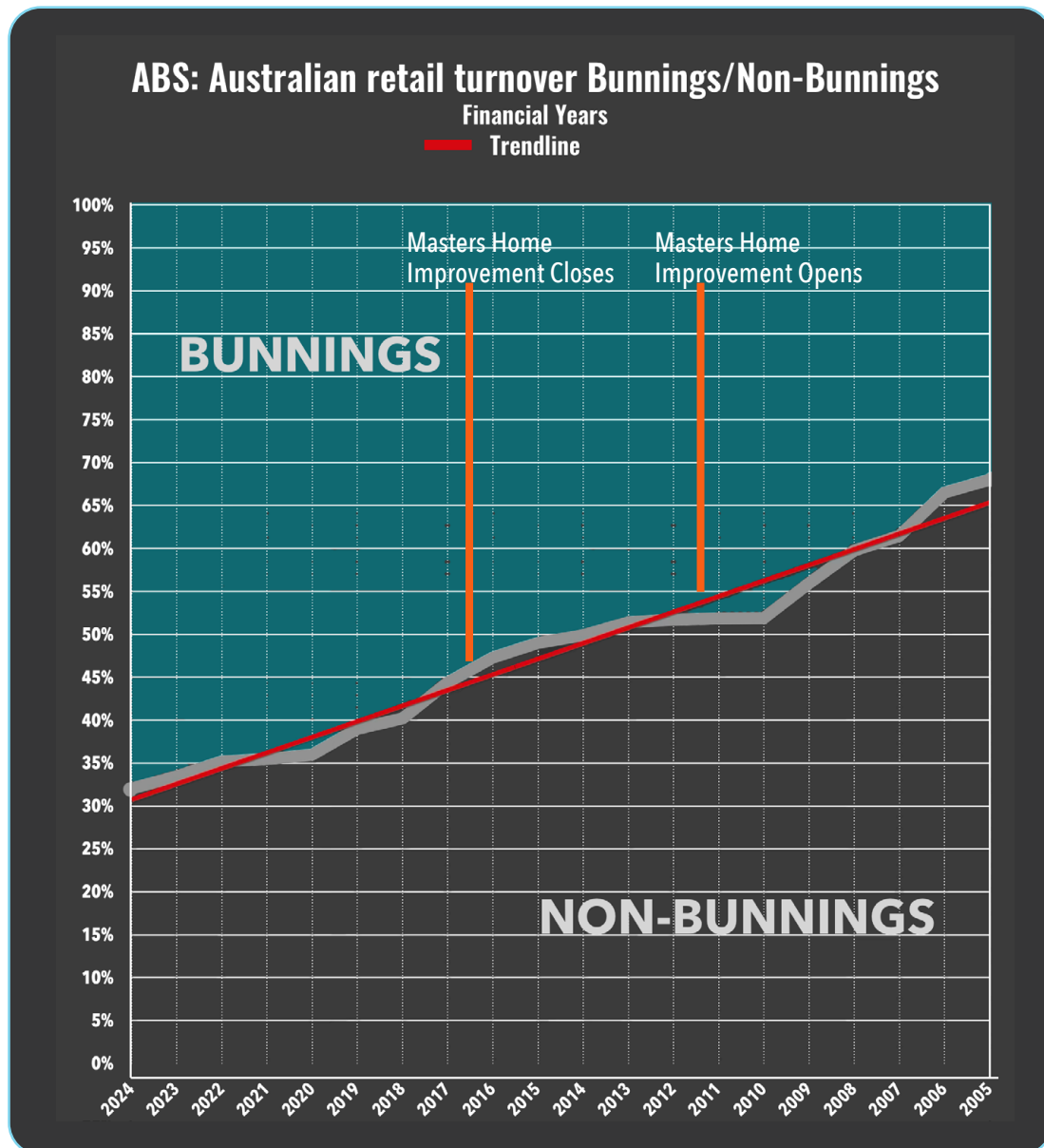
ABS: Hardware retail turnover: Australia
Original \$millions



ABS: Hardware retail turnover: Australia
Inflation-adjusted \$millions



BUNNINGS



Overall, in 2025 dollars, the hardware market expanded from \$19.8 billion in 2005 to \$26.0 billion, increase of \$6.2 billion, up by 31.2%.

All of that additional market value, the growth, has been captured by Bunnings.

In FY2025 dollars retail revenue in FY2005 was \$13.5 billion for non-Bunnings and \$6.4 billion for Bunnings. In FY2024 that had changed to \$8.3 billion for non-Bunnings, and \$17.7 billion for Bunnings. So, non-Bunnings revenue declined by 38.2%, while Bunnings' Australian revenue increased by 178.7%.

Despite this, both independent hardware retailers themselves and those who service those retailers tend not to acknowledge exactly how dire the market situation really is. The two charts on the previ-

ous page reveal one part of what is going on with that. In non-deflated dollars, the non-Bunnings value of the market has actually slightly increased.

It's only when you look at overall market size, and use inflation-adjusted revenues that the scale of what is actually a near-disaster is revealed.

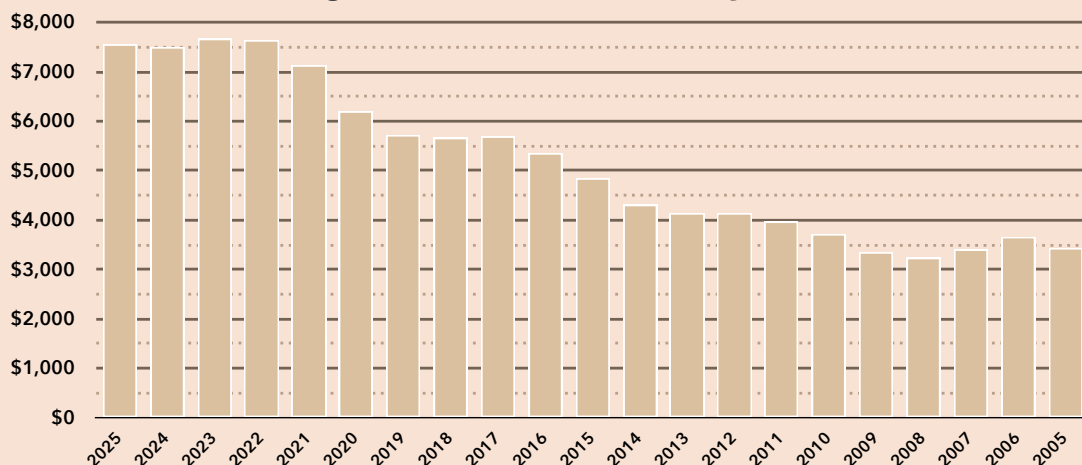
In particular, it's worth calling out those in the industry who believed the slight surge in independent revenues during COVID would translate into ongoing sales growth for independents — especially Metcash's Independent Hardware Group (IHG).

In inflation-adjusted terms, non-Bunnings revenue in FY2019 was \$9.34 billion, and reached a peak of \$10.04 billion in FY2022. As mentioned above, in FY2024 by the same measure non-Bunnings revenue was \$8.34 billion.

NEW SOUTH WALES

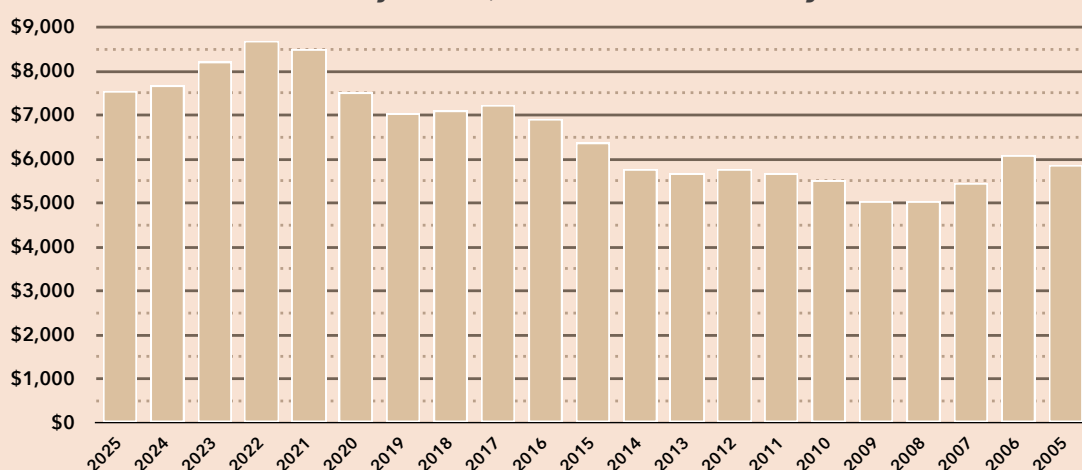
ABS: Hardware retail turnover: NSW

Original \$millions — financial years



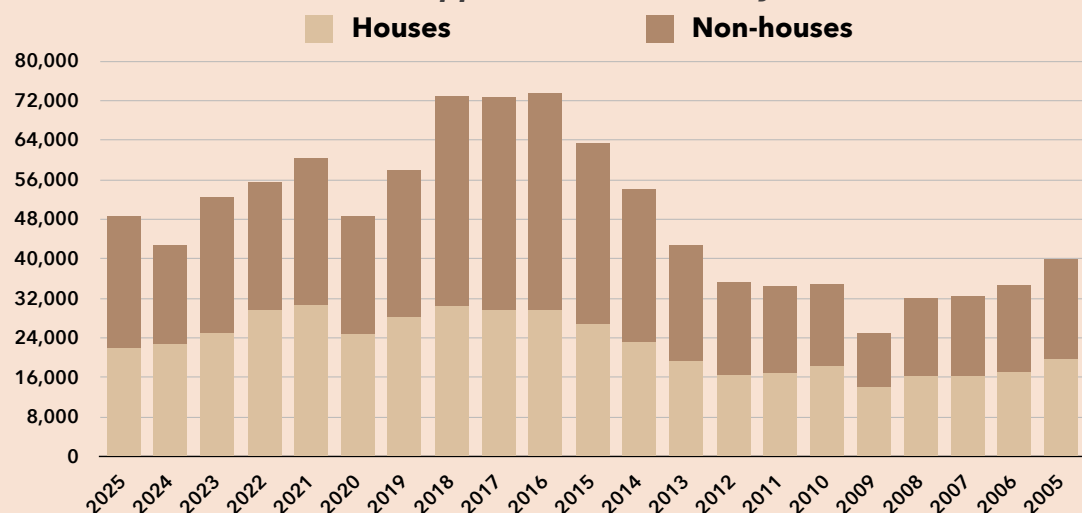
ABS: Hardware retail turnover: NSW

Inflation-adjusted \$millions — financial years



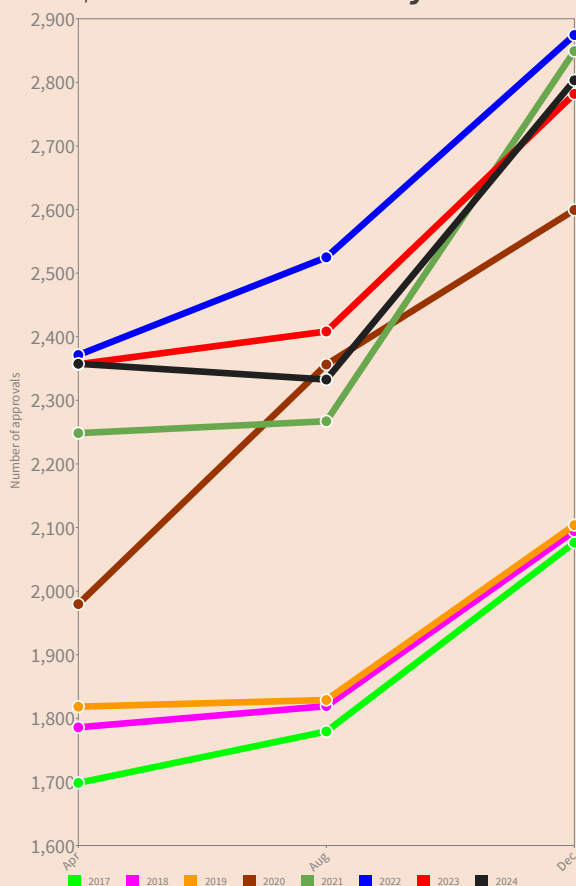
ABS: Building approvals: NSW

Number of approvals — financial years

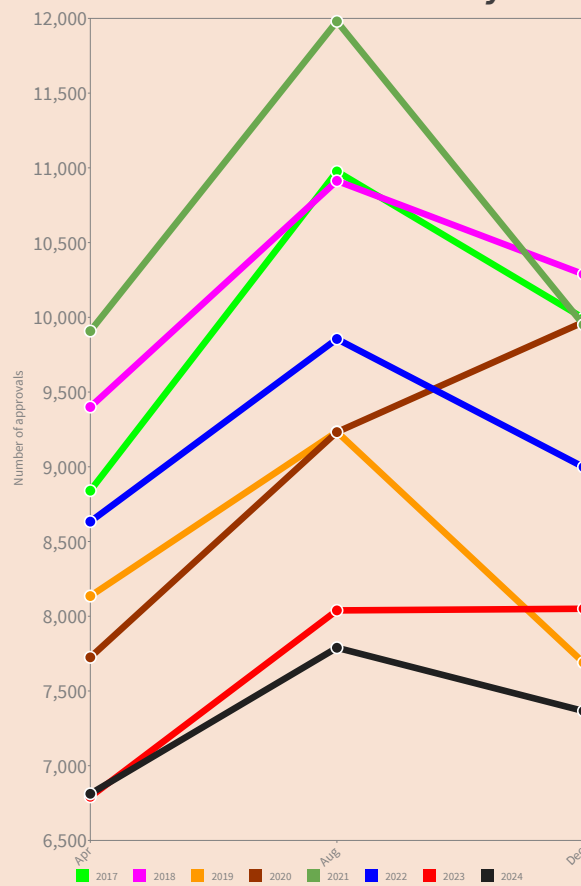


NEW SOUTH WALES

ABS: Retail sales: NSW
\$millions — Calendar years



ABS: Building approvals: NSW
Number of houses — Calendar years



Previous page

Unsurprisingly, the pattern of hardware retail sales in NSW over the past 21 years is almost a duplicate of that for Australia as a whole.

The pattern of building approvals, however, is not. Over this 21 FY period, some 60.54% of all approvals in Australia were for houses. For NSW, only 46.95% were for houses (total house approvals were 475,009; total non house approvals were 537,935). The FY median number for house approvals is 22,694, and for non houses it is 24,089.

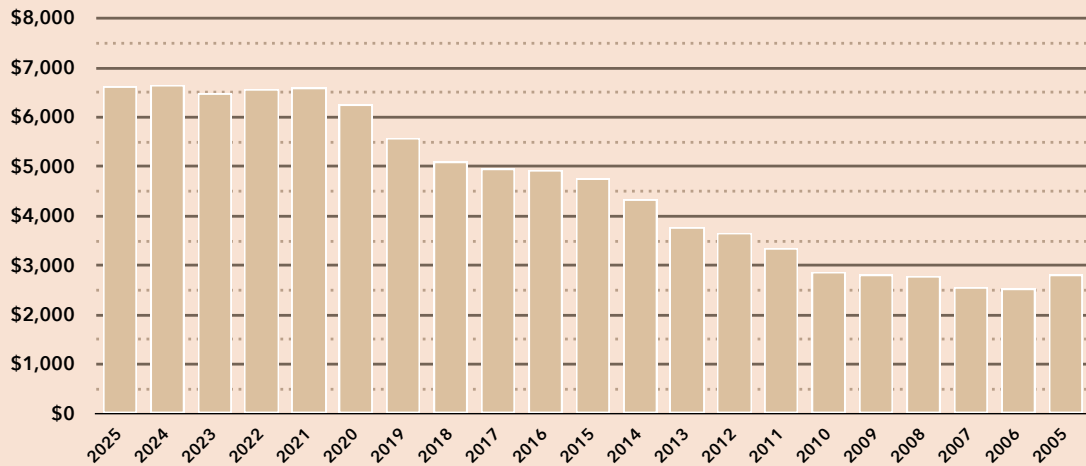
Current page

Retail sales for NSW follows the national pattern very closely. The final quadrimester of 2021 was stronger than nationally. 2022 was a particularly strong year. 2024 was also not quite as strong as the Australian average, with the first two quadrimesters below 2023.

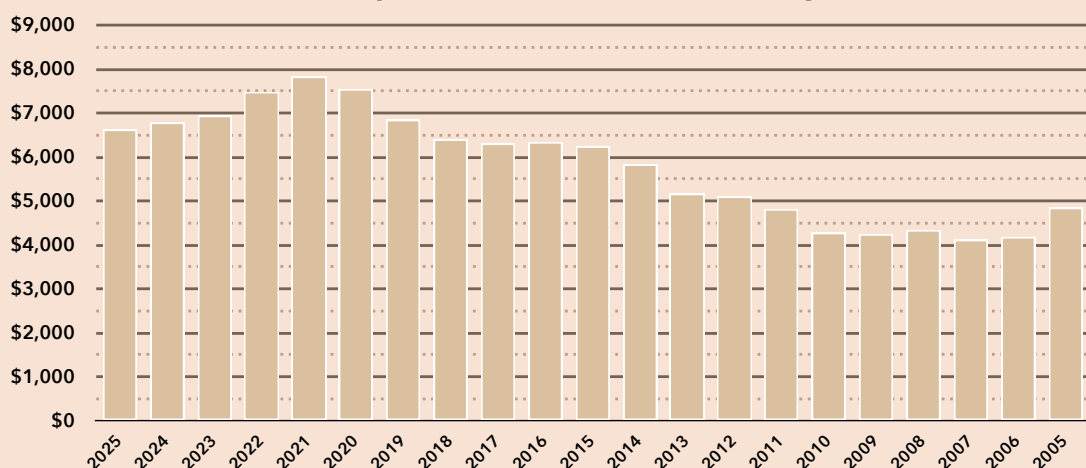
Approvals in NSW followed the national pattern for 2017 to 2019, but had a different COVID pattern. Its 2020 was broadly inline with Australia, but there was a sharp increase in approvals for the first period of 2021, and then a slightly sharper drop than the average for the final quadrimester of that year. It also shows a stronger recovery through 2024.

VICTORIA

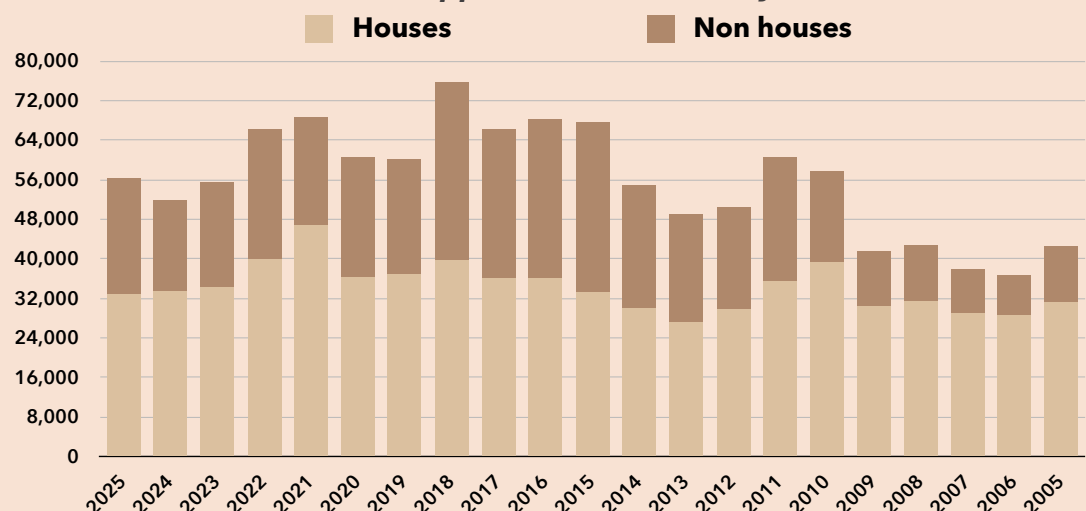
ABS: Hardware retail turnover: VIC
Original \$millions — financial years



ABS: Hardware retail turnover: VIC
Inflation-adjusted \$millions — financial years

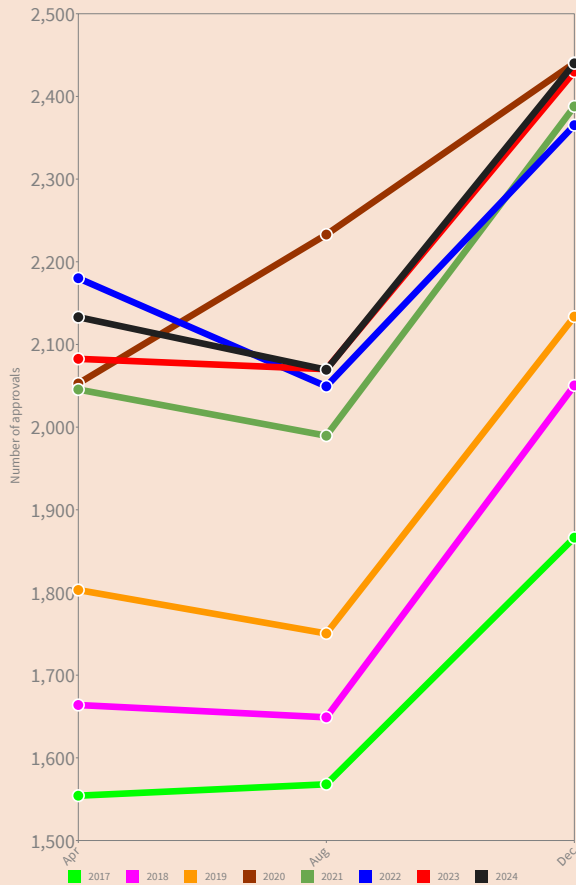


ABS: Building approvals: VIC
Number of approvals — financial years

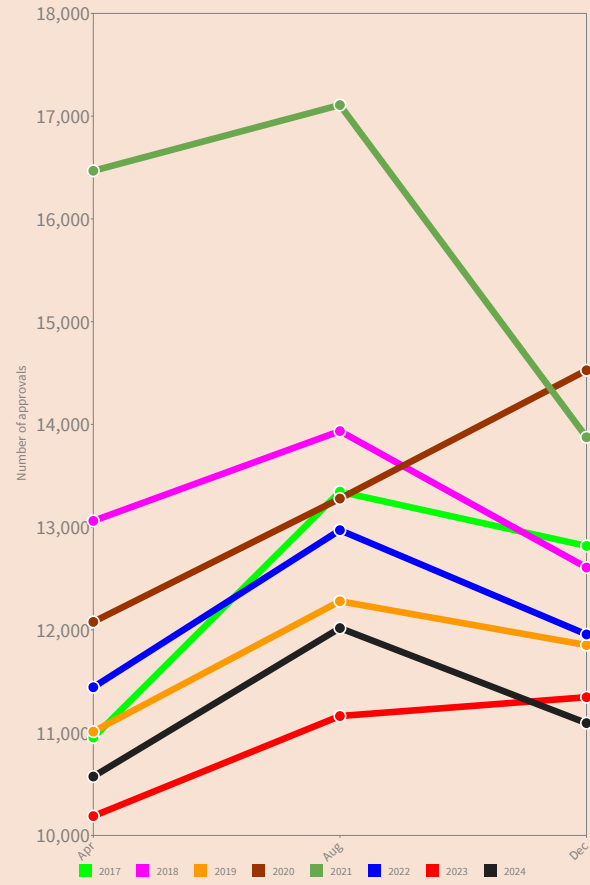


VICTORIA

ABS: Retail sales: VIC
\$millions — Calendar years



ABS: Building approvals: VIC
Number of houses — Calendar years



Previous page

Again, VIC does not depart much from the pattern set by the overall Australian retail sales — except for a slightly higher level of sales in FY2005.

Where NSW has the most non house approvals, VIC has the most house approvals. Some 61.36% of its approvals across the 21 year period are for houses (718,629 house approvals, 425,516 non house approvals).

Current page

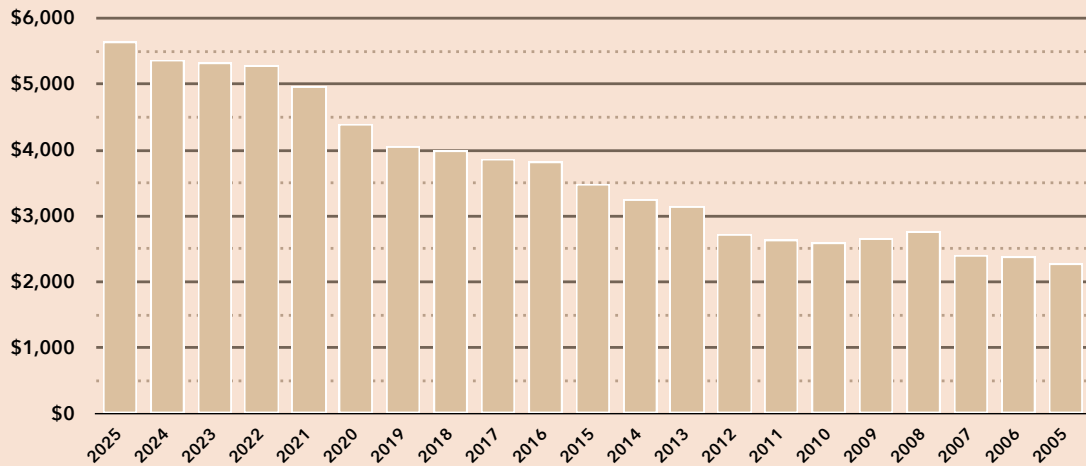
The retail sales pattern for VIC is broadly inline with that for Australia overall, with the exception that the second and third 2020 quadrimesters — so May to December 2020 — are lower than those of the following three years.

VIC nearly matches the Australian average of approvals — not surprising given it is the dominant house builder. It's slightly down on the average for the final quadrimester of 2020 and the first of 2021.

QUEENSLAND

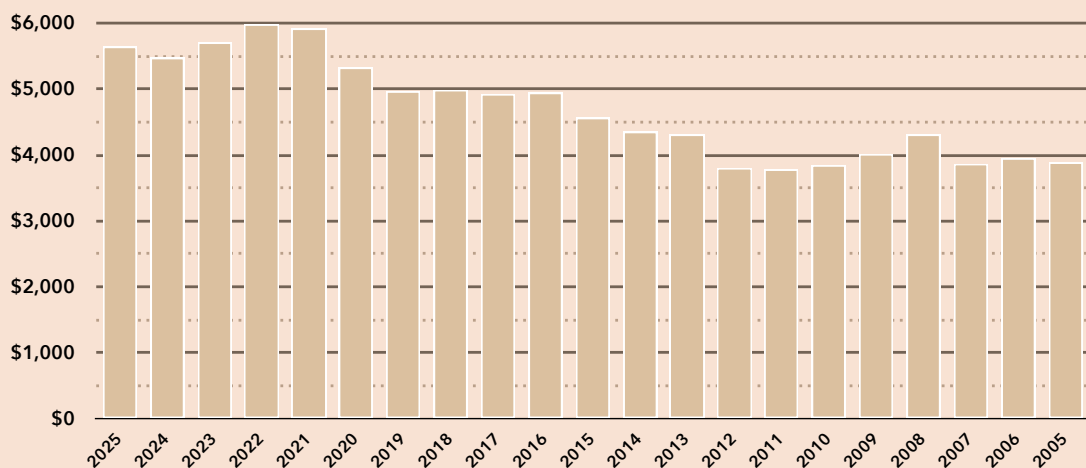
ABS: Hardware retail turnover: QLD

Original \$millions — financial years



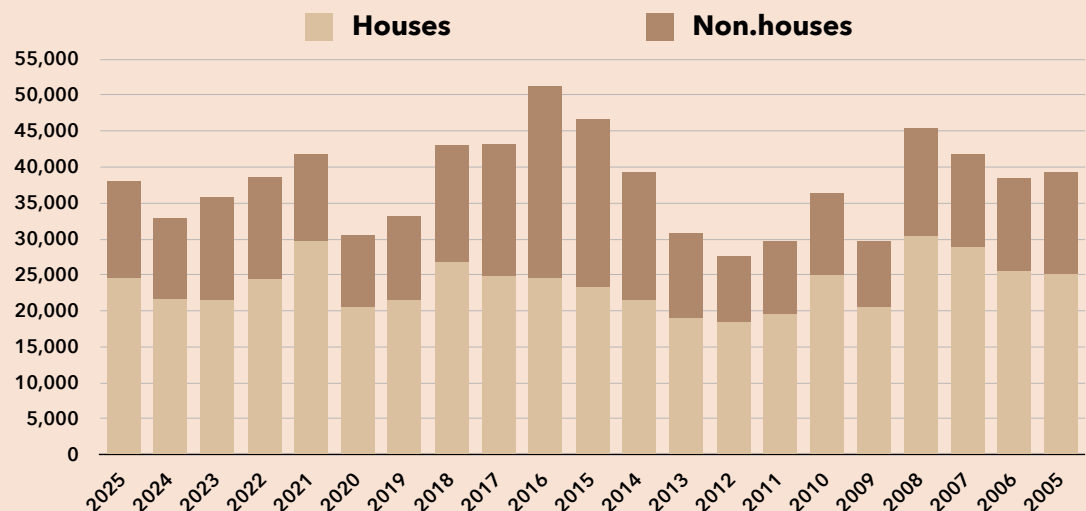
ABS: Hardware retail turnover: QLD

Inflation-adjusted \$millions — financial years



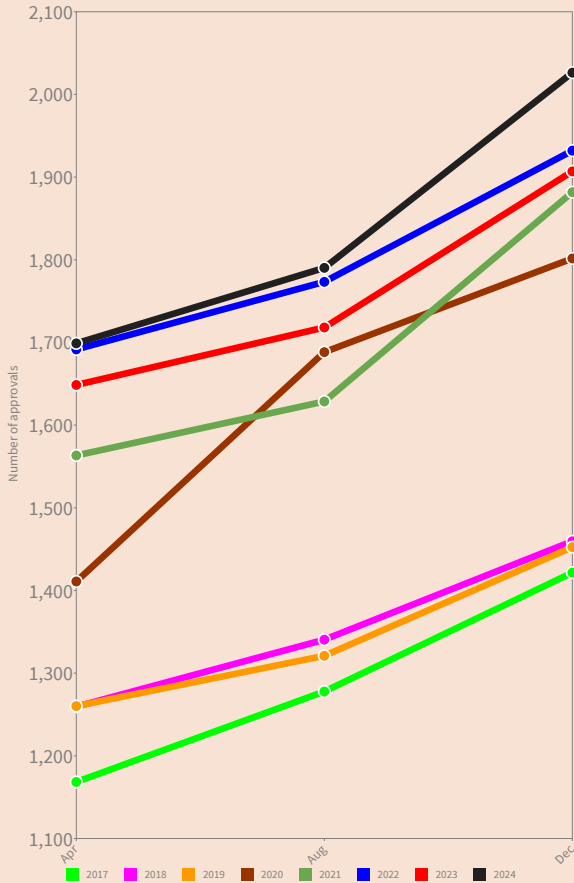
ABS: Building approvals: QLD

Number of approvals — financial years

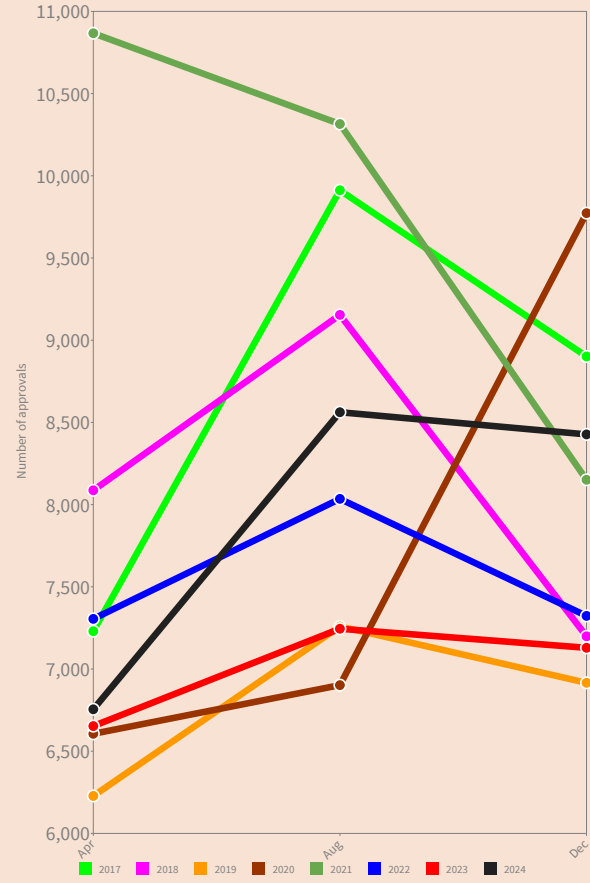


QUEENSLAND

ABS: Retail sales: QLD
\$millions — Calendar years



ABS: Building approvals: QLD
Number of houses — Calendar years



Previous page

QLD follows the national pattern fairly closely, with the exception of a higher than expected number in FY2016, driven largely by an increase in non house approvals, and another high 2007.

Houses made up 62.59% of approvals. There was a total of 496,300 house approvals, and 296,591 non house approvals over the 21 year period.

Current page

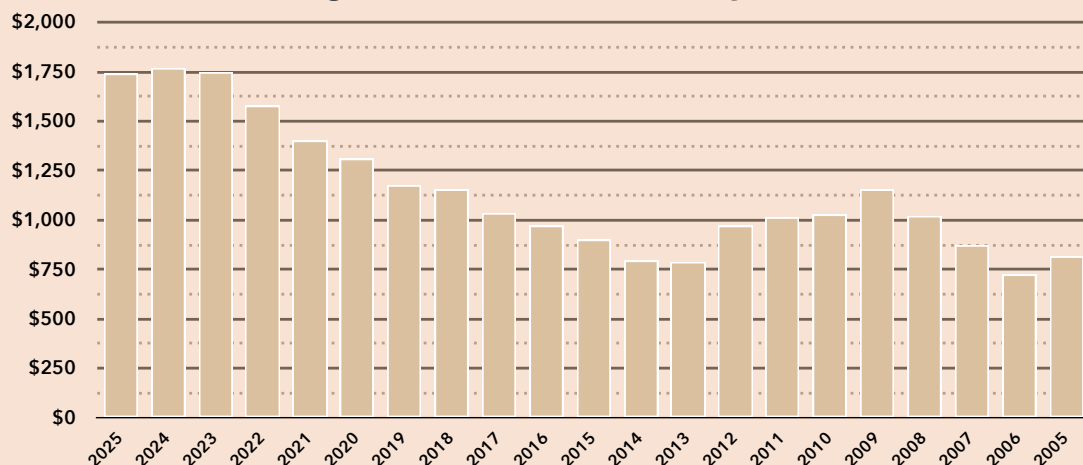
QLD virtually duplicates the Australian retail results, with the exception of a stronger 2024. It's also the case that for this state the second quadrimester (May to August) shows a substantial increase over the first (January to April), where in Australia and most other states the two are closer to equal.

The major difference in approvals for QLD over the national average is that it has staged a very strong recovery in approval numbers for the mid-year and final quadrimesters of 2024.

SOUTH AUST.

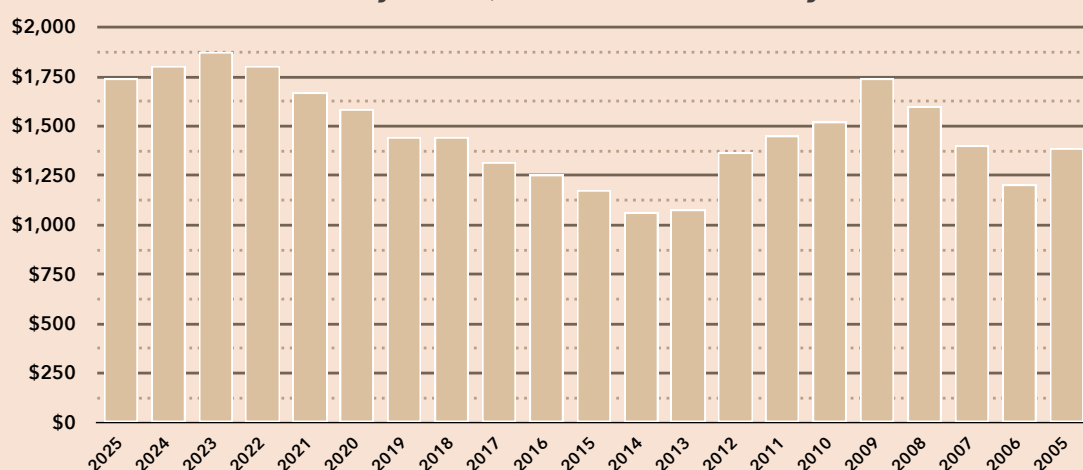
ABS: Hardware retail turnover: SA

Original \$millions — financial years



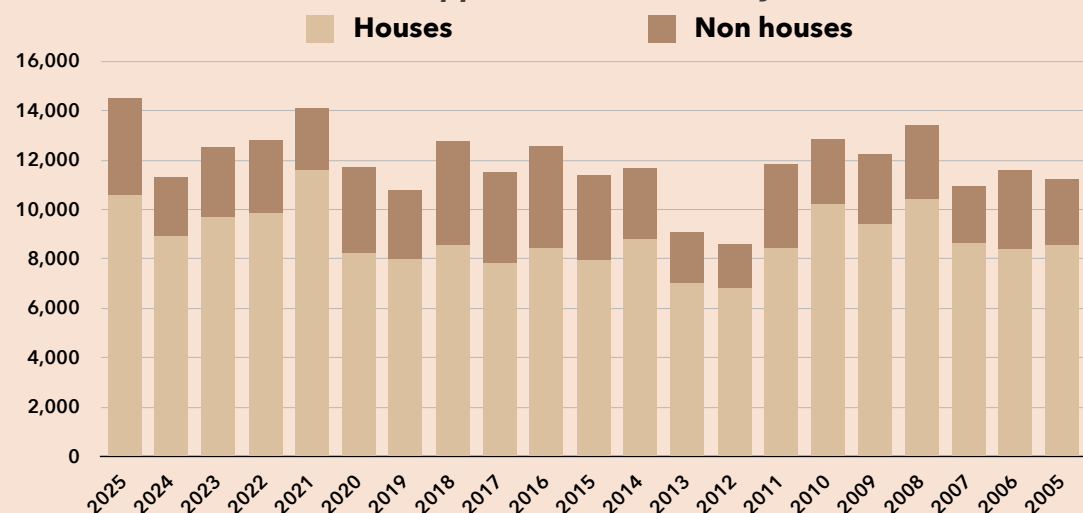
ABS: Hardware retail turnover: SA

Inflation-adjusted \$millions — financial years



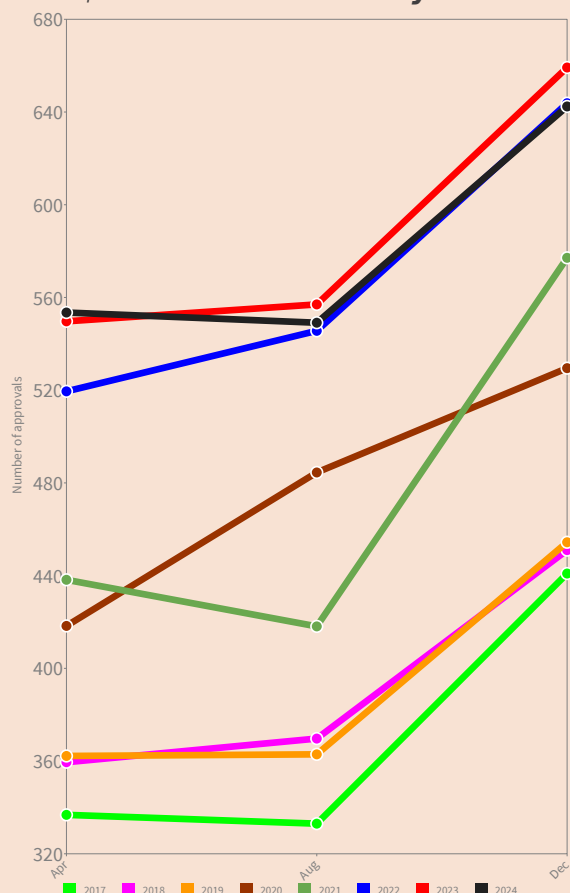
ABS: Building approvals: SA

Number of approvals — financial years

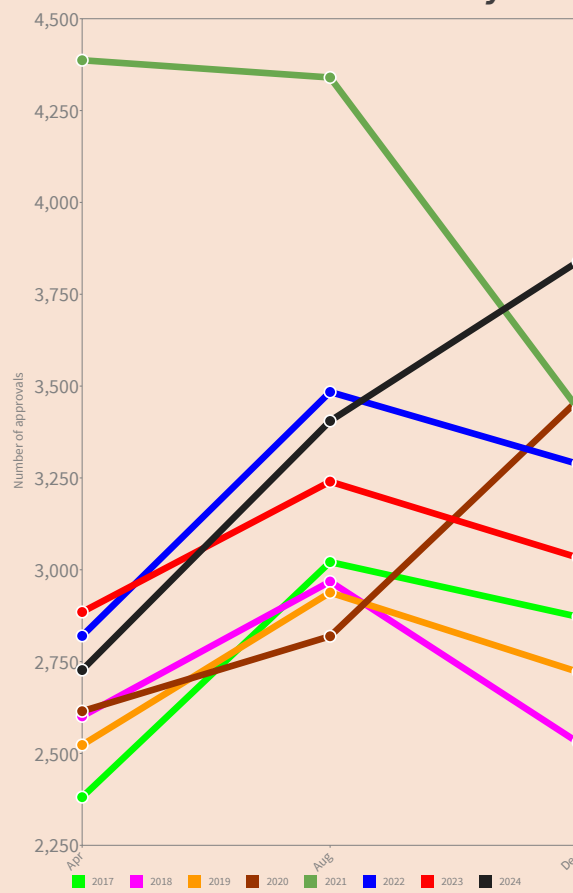


SOUTH AUST.

ABS: Retail sales: SA
\$millions — Calendar years



ABS: Building approvals: SA
Number of houses — Calendar years



Previous page

SA shows little variance in pattern from the national average. FY2015 is lower than expected, as it 2019, while 2008 is higher. SA is in the low range for non house approvals, with houses making up 74.76% of all approvals.

Over the 21 year period, SA had a total of 186,412 house approvals, and 62,933 non house approvals.

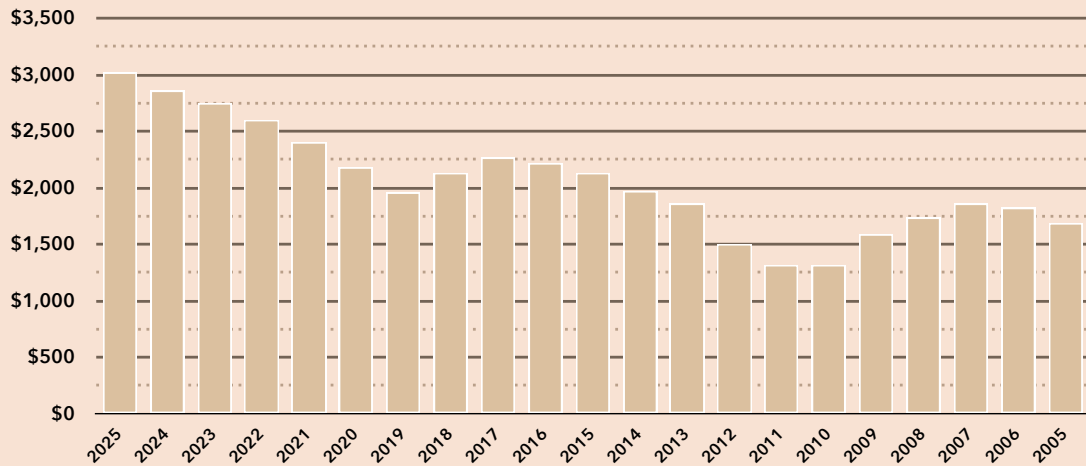
Current page

SA shows a different COVID pattern in retail sales. After a strong surge in sales in the final quadrimester of 2020, the final quadrimester of 2021 was more muted, as was the following quadrimester at the start of 2022, followed by very strong results for the rest of that year. The final quadrimester for both 2023 and 2024 were also muted, falling below the second quadrimesters for those years.

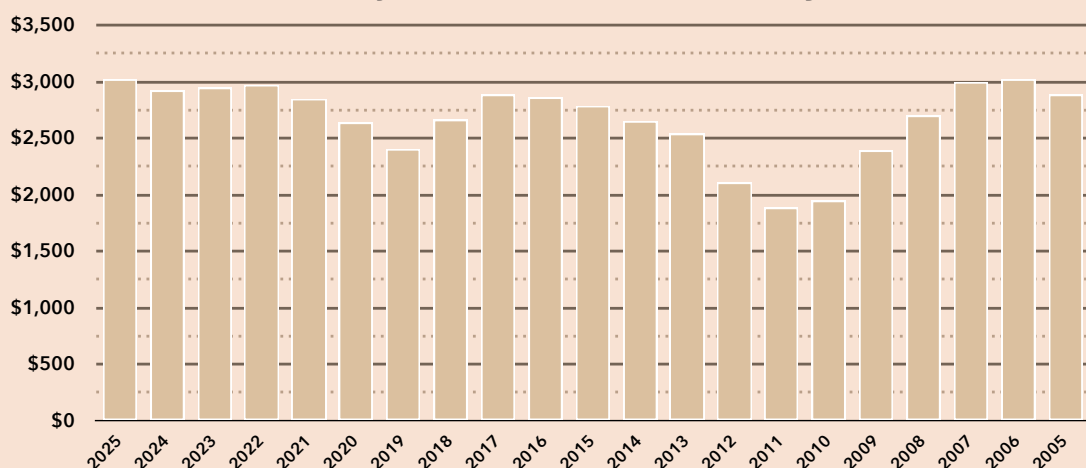
SA shows somewhat muted numbers of approvals for 2017 through to 2019. For 2020 it follows the national trend, but with less growth. 2021, however, shows stronger growth, with the familiar national fall in 2022. The biggest difference from the national average is in its recovery in 2023, and strong increase in 2024, particularly in the final quadrimester.

WESTERN AUST.

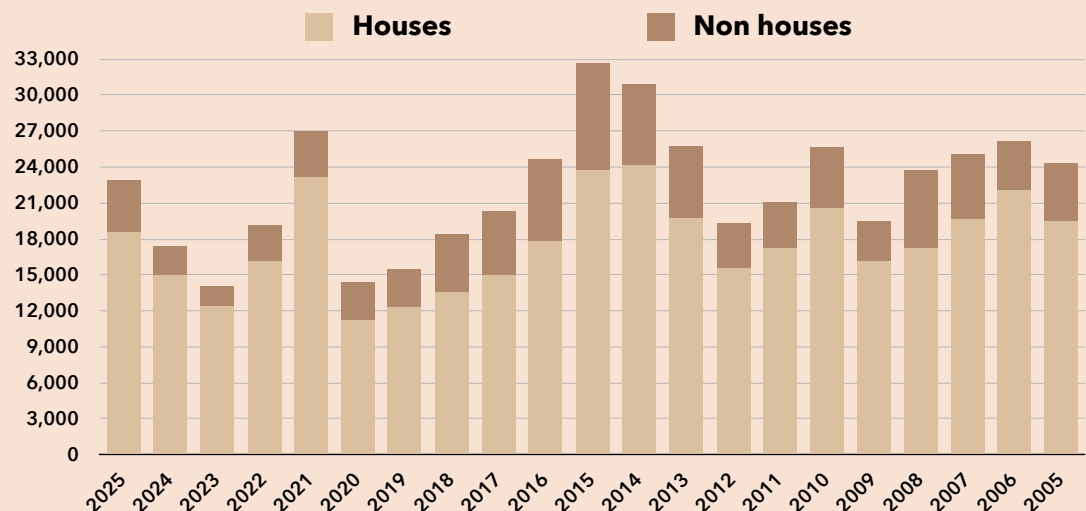
ABS: Hardware retail turnover: WA
Original \$millions — financial years



ABS: Hardware retail turnover: WA
Inflation-adjusted \$millions — financial years

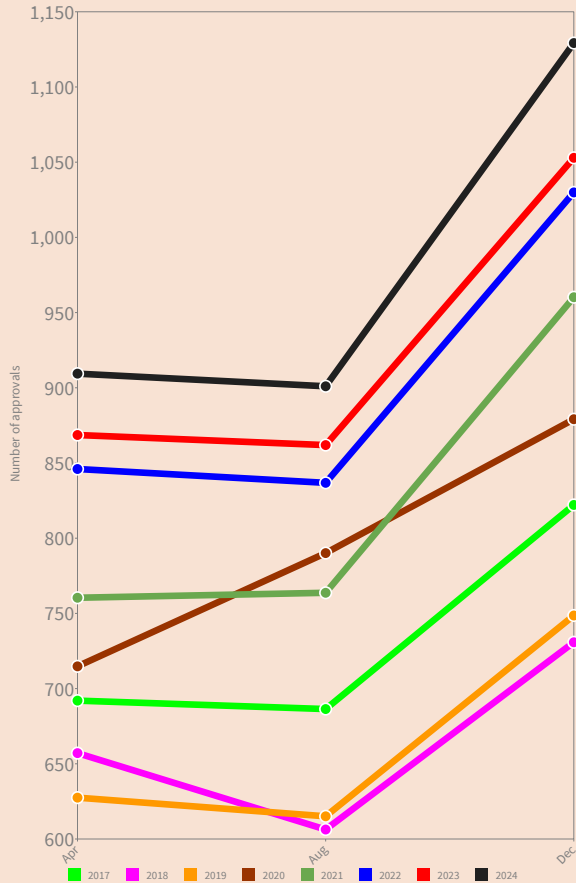


ABS: Building approvals: WA
Number of approvals — financial years

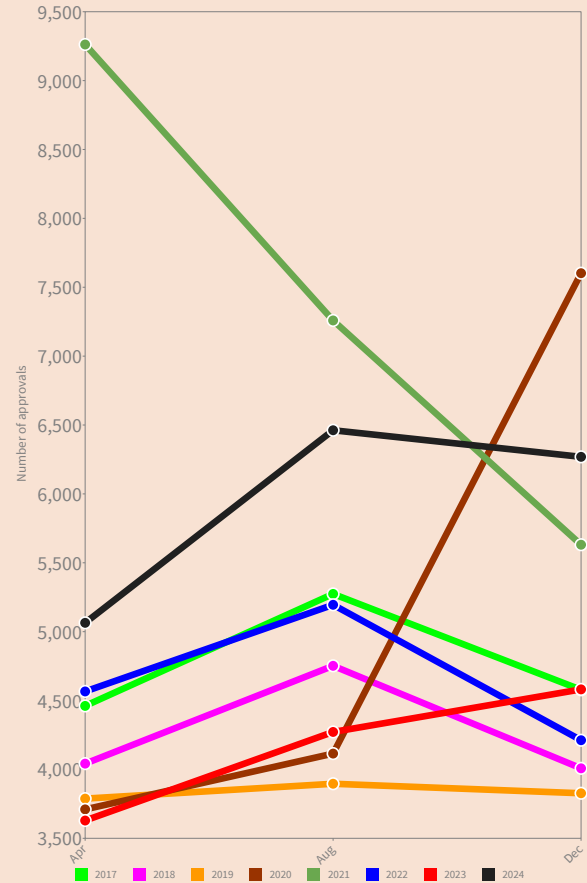


WESTERN AUST.

ABS: Retail sales: WA
\$millions — Calendar years



ABS: Building approvals: WA
Number of houses — Calendar years



Previous page

WA differs broadly from the national pattern. FY2006 and FY2007 are higher than expected. There is a decline in approval numbers from FY2016 to FY2020, followed by a sharp increase in 2021.

WA has a low percentage of non house approvals, with houses making up 79.24% of all approvals. Across the 21 year period, WA had 370,437 house approvals, and 97,056 non house approvals.

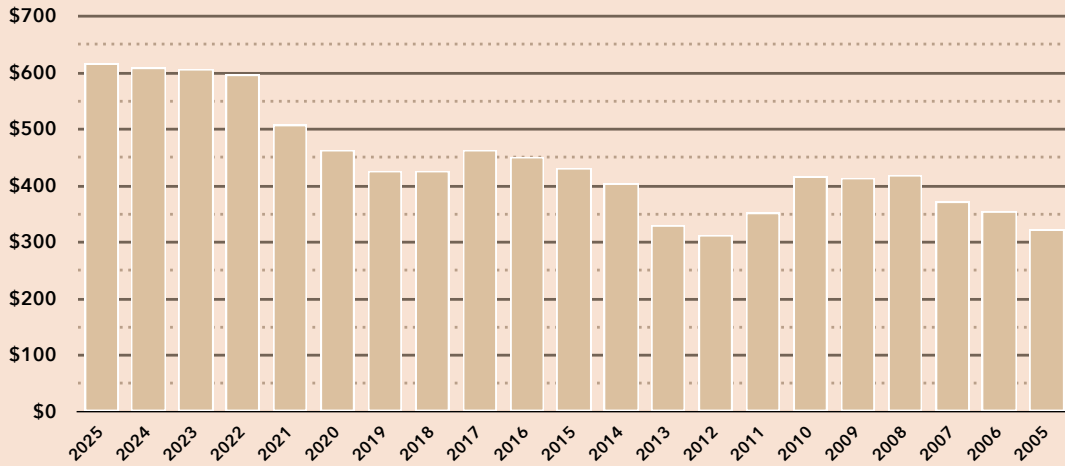
Current page

Historically, WA's sales in 2017 was higher than the Australian average. It also showed ongoing growth for the 2022, 2023 and 2024, where the Australian results showed nearly identical years.

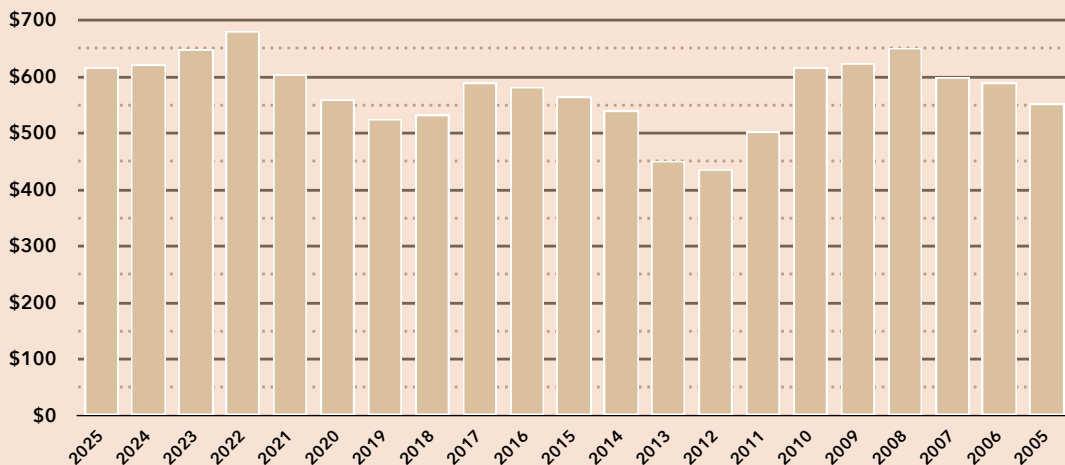
WA experienced relatively low levels of approvals for 2019, and then the familiar strong boost for the final quadrimester of 2020. 2021 began with the same increase as the Australian average, but this was not sustained into the second quadrimester. Both 2021 and 2022 were somewhat subdued, while 2023 matched the Australia-wide decrease. 2024, however, showed a stronger than usual recovery.

TASMANIA

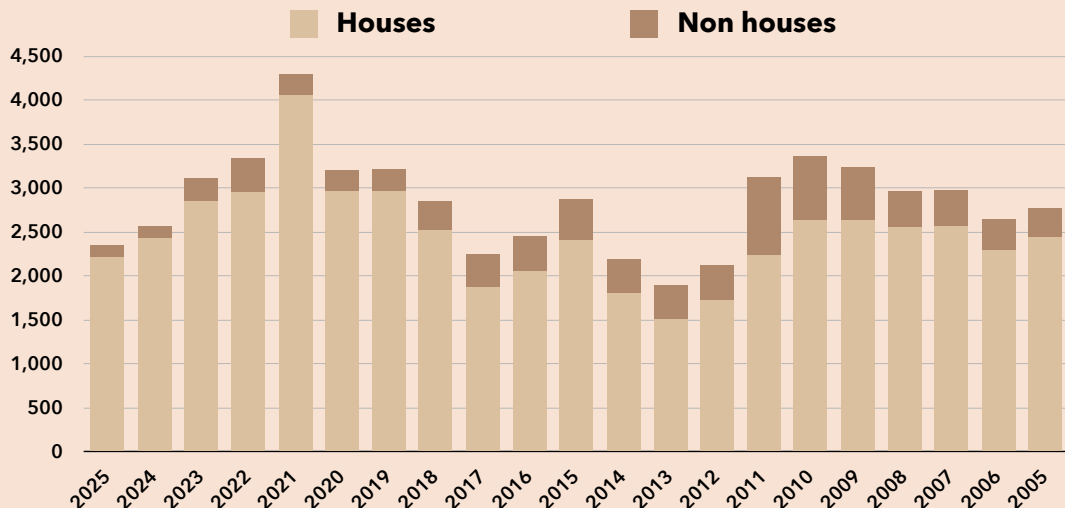
ABS: Hardware retail turnover: TAS
Original \$millions — financial years



ABS: Hardware retail turnover: TAS
Inflation-adjusted \$millions — financial years

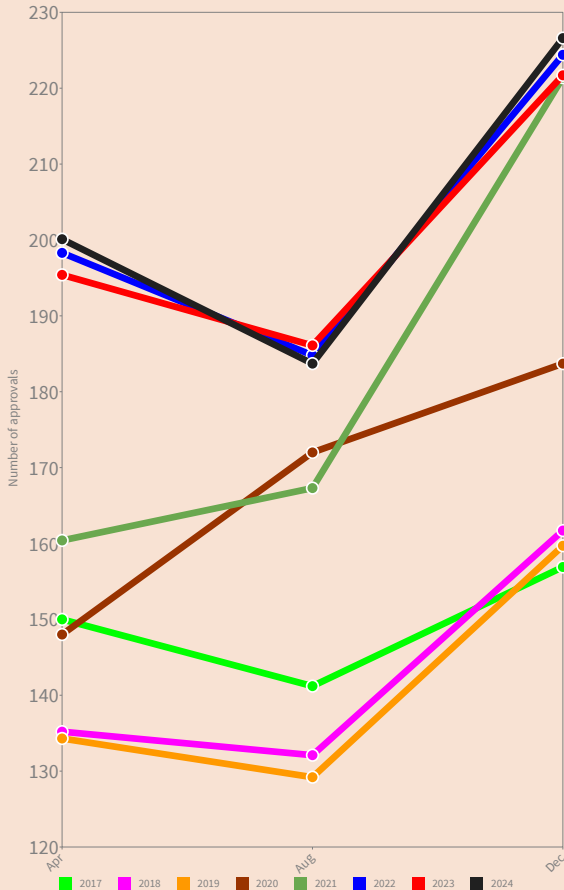


ABS: Building approvals: TAS
Number of approvals — financial years

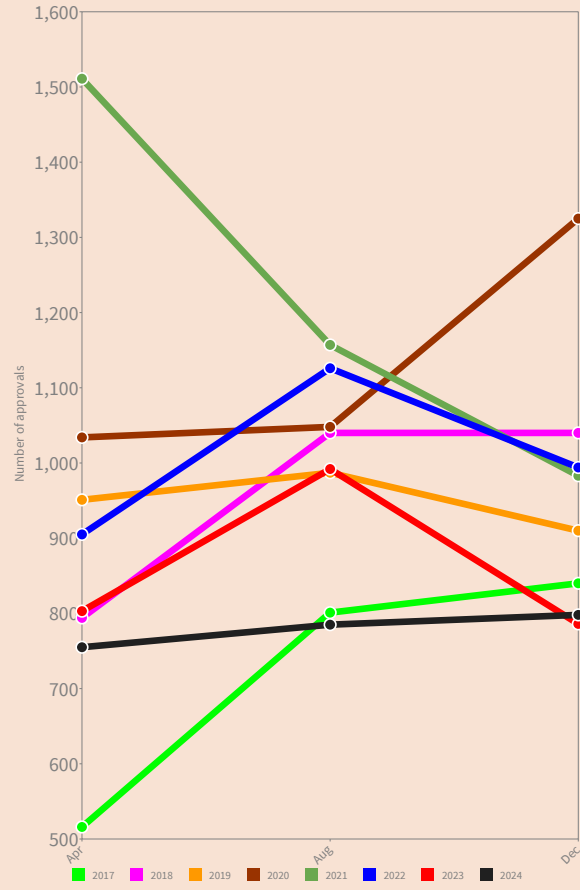


TASMANIA

ABS: Retail sales: TAS
\$millions — Calendar years



ABS: Building approvals: TAS
Number of houses — Calendar years



Previous page

TAS shows a steady increase in approvals from FY2005 to FY2010, followed by a decline from FY2011 to FY2013. The 21-year high occurs in FY2021, and followed by an ongoing decline to FY2025.

TAS has the lowest percentage of non house approvals, at just 13.49% of the total. There were 51,716 house approvals and 8,061 non house approvals in the 21 year period.

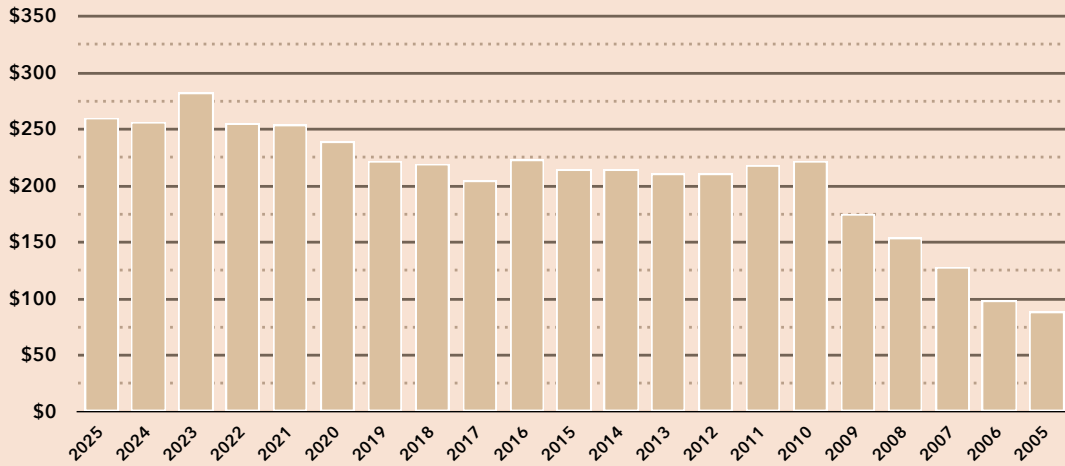
Current page

TAS had a better than Australian average start to 2017 in retail, but most of its performance is broadly in line with the average. There was strong transition to a higher level of sales at the end of 2021, and that has continued in subsequent years. A persistent feature of its sales, which is a decline in the second quadrimester over the first, and continued and strengthened from 2022 to 2024.

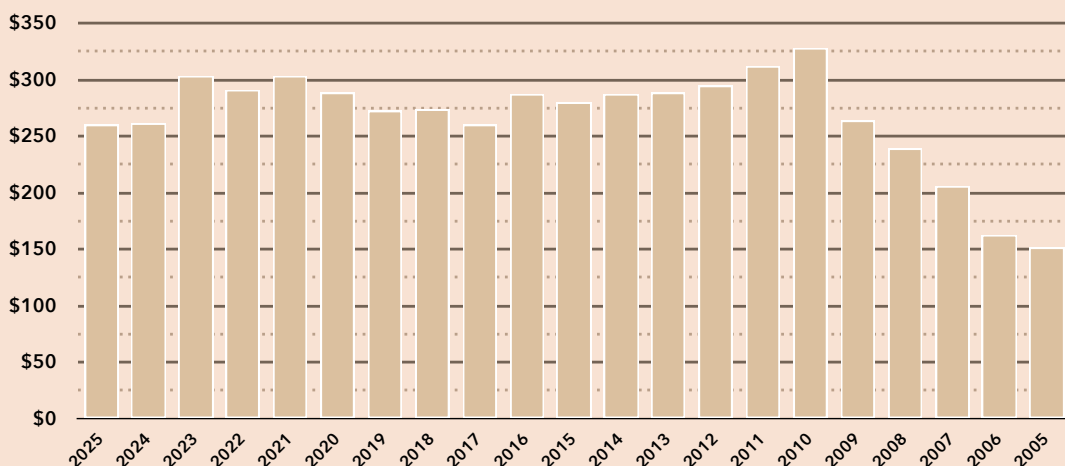
Approvals were subdued at the start of 2017, but recovered at the end of that year. The surge in 2021 was strong for the first quadrimester, but fell sharply in the second. Approvals in the second quadrimester of 2024 were down on the same period in 2023.

NORTHERN TERR.

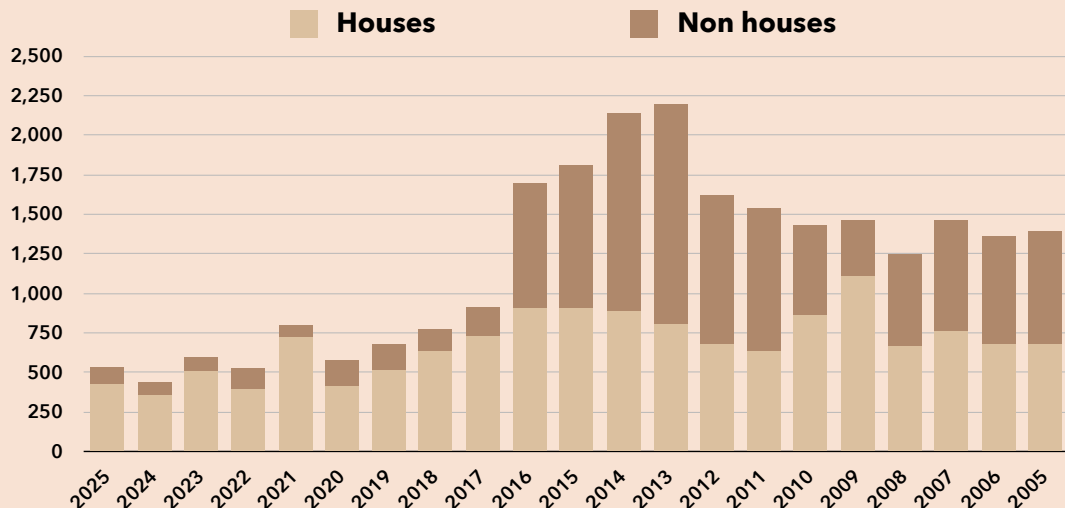
ABS: Hardware retail turnover: NT
Original \$millions — financial years



ABS: Hardware retail turnover: NT
Inflation-adjusted \$millions — financial years

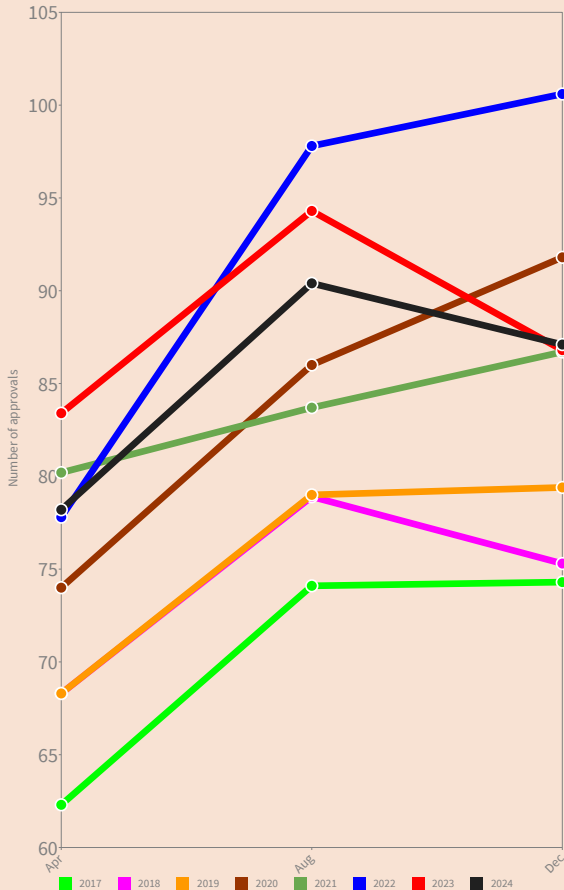


ABS: Building approvals: NT
Number of approvals — financial years

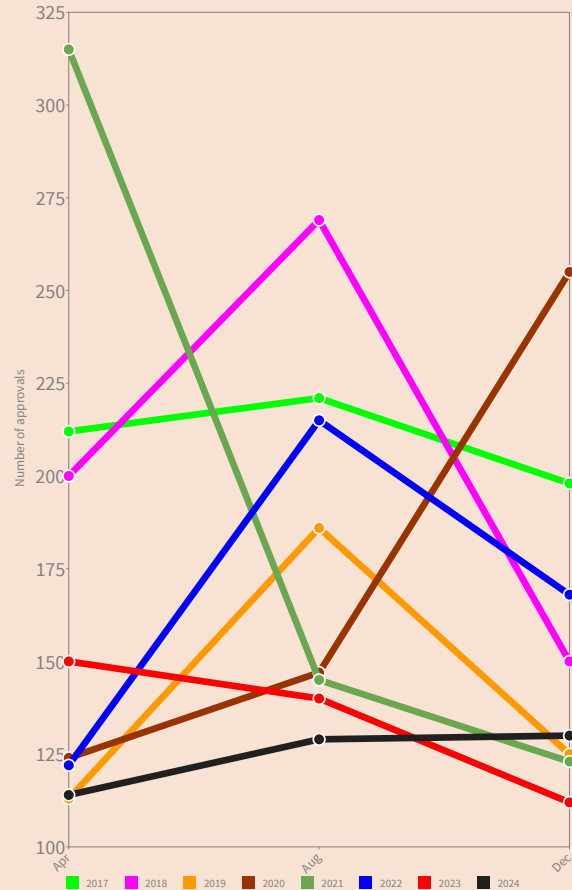


NORTHERN TERR.

ABS: Retail sales: NT
\$millions — Calendar years



ABS: Building approvals: NT
Number of houses — Calendar years



Previous page

NT follows the national average loosely through to FY2012, with a dip in approvals in FY2008 rather than the national 2009. It reaches peak approval in FY2013 and FY2014, largely driven by the non house sector. Higher than usual non house approvals continue in FY2015 and FY2016, though at a declining level. From FY2017 onwards, non house approvals are at very low levels, and house approvals decline through to FY2020, improve in FY2021, then return to low levels.

Housing approvals make up 56.65% of all approvals for the 21-year period. There was a total of 14,275 house approvals and 10,925 non house approvals.

Current page

Due largely to its small size, NT tends to be more volatile than the other states. Sales also will frequently peak during the second quadrimester, instead of the last, due to the tropical weather system.

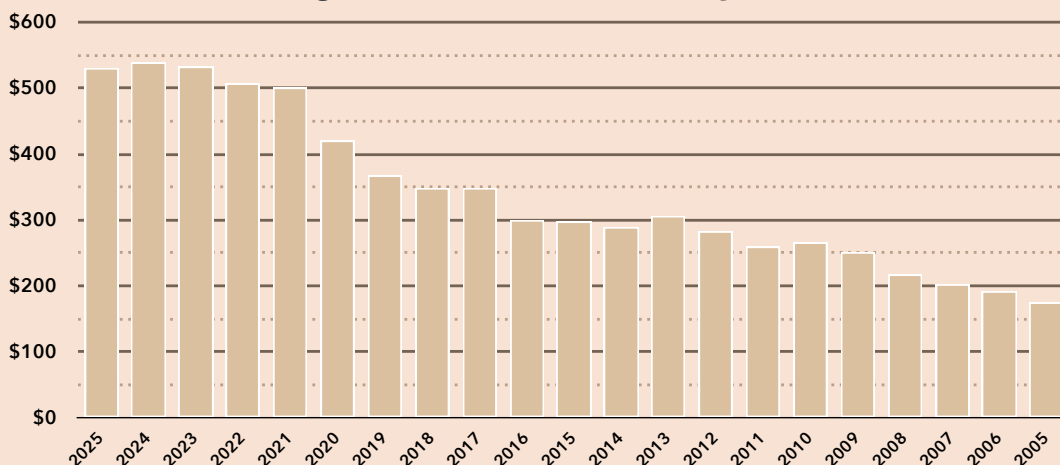
NT shows particularly strong growth during 2022, then a decline that begins in the final quadrimester of 2023, and continues through 2024.

Both 2017 and 2018 were relatively strong years for approvals in NT. While approvals rose sharply for the first quadrimester of 2021, they also declined abruptly in the second. 2022 followed the national average, but both 2023 and 2024 have been subdued.

AUST. CAPITAL TERR.

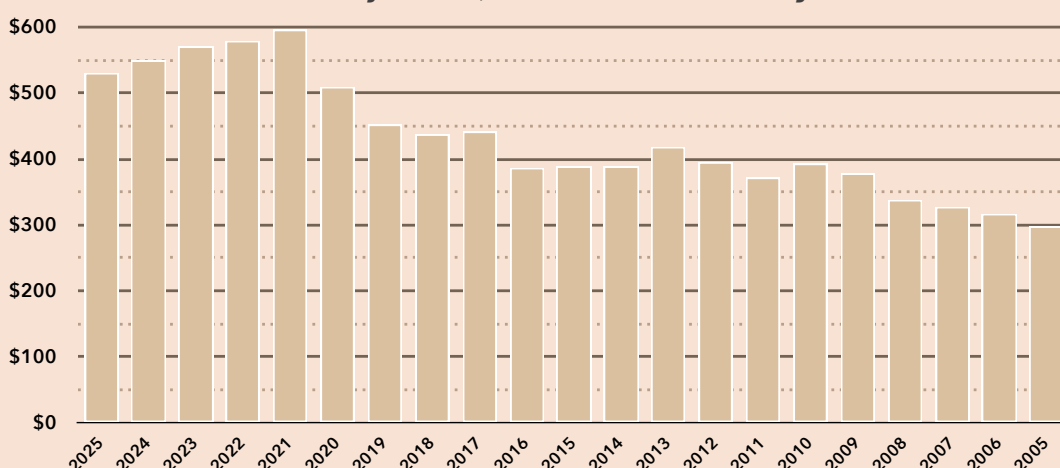
ABS: Hardware retail turnover: ACT

Original \$millions — financial years



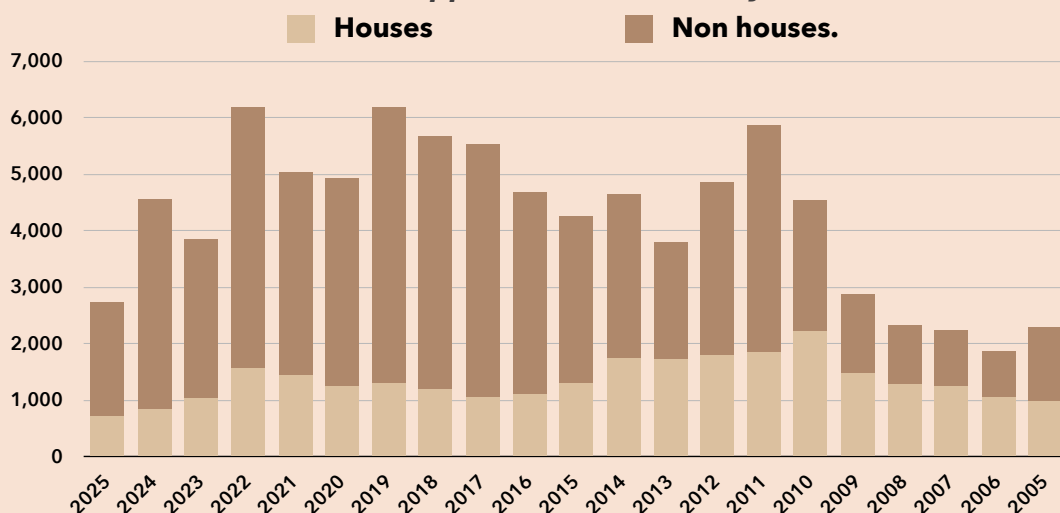
ABS: Hardware retail turnover: ACT

Inflation-adjusted \$millions — financial years



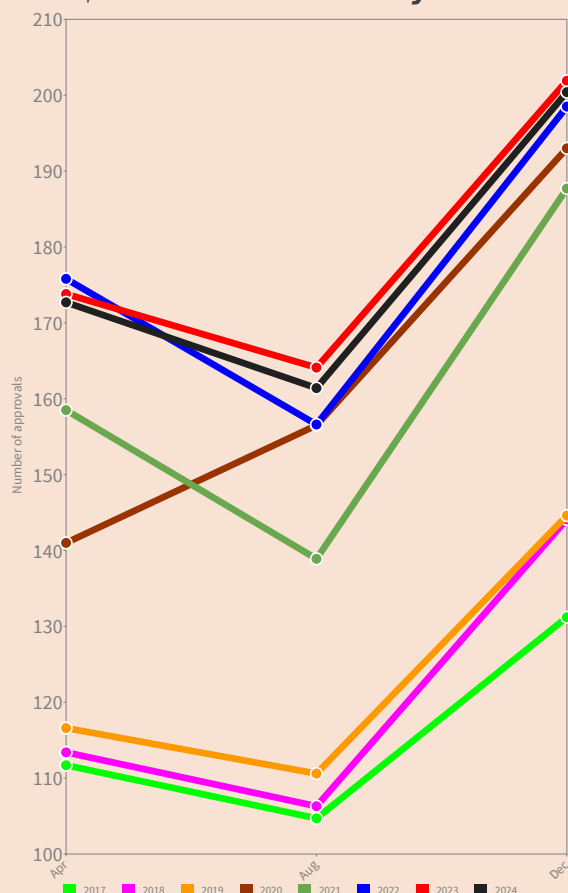
ABS: Building approvals: ACT

Number of approvals — financial years

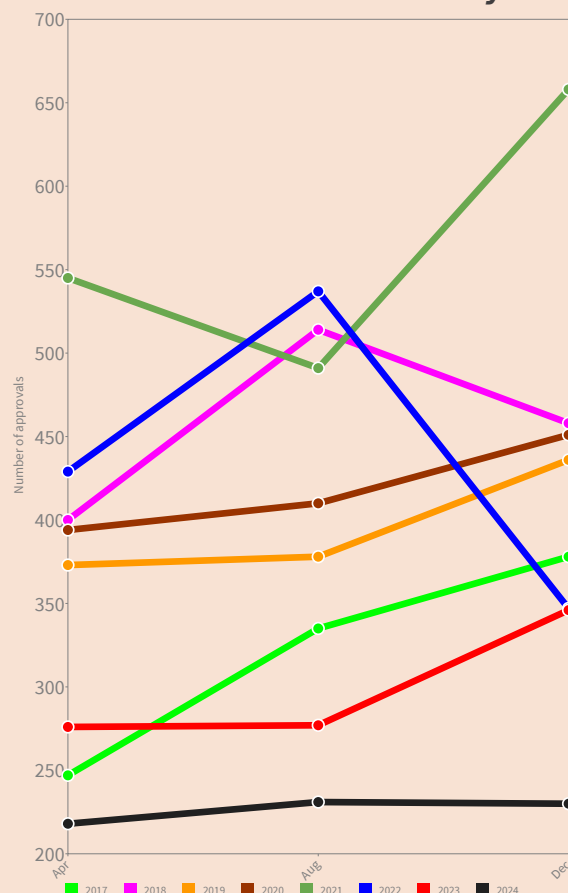


AUST. CAPITAL TERR.

ABS: Retail sales: ACT
\$millions — Calendar years



ABS: Building approvals: ACT
Number of houses — Calendar years



Previous page

Building approvals in ACT have little relation to national averages. FY2005 to FY2009 shows limited growth in approvals. From FY2010 to FY2022 there is a high level of non-house approvals, with peaks reached in FY2011, FY2019 and FY2022. FY2023 sees a sharp decline, with a slight recovery in non house approvals in FY2024. FY2025 sees a return to the approval levels of FY2009.

Unsurprisingly, ACT shows the highest level of non house approvals, at 68.33% over the 21-year period. Total house approvals over that period were 28,151 and non house approvals were 60,740.

Current page

Like TAS, ACT also shows a steep decline in sales for the mid-year quadrimester over the first, though this is quite consistent. ACT showed a relatively stronger increase at the end of 2020, and a stronger decline at the mid-point of 2021 than the average, but sales since then have followed those of Australia as a whole.

Both 2017 and 2019 were unusual for approvals in ACT, in that the peak for those years occurred in the final quadrimester. ACT also missed out on the strong boost to approvals in the final period of 2020, and 2021 played out very differently from the national numbers. The year became with a smaller increase than in much of the rest of Australia then declined in the second quadrimester, before increasing sharply in the final one. The decline at the end of 2022 was also greater than elsewhere. 2024 returned the lowest level of approvals in this eight-year series.

ANALYSIS

The “headline” results of looking at these numbers largely comes down to the chart on page XX which shows the ever-growing market share of Bunnings. The stats represented here in part indicate one reason why that national big-box chain could be so successful. Despite the wide differences in climate and local culture throughout Australia, there is a surprising similarity in economic conditions. It’s truly surprising how closely each state and territory tracks to the national averages.

That’s very much not the case elsewhere in the world. The economics of, say, California in the USA are very different to those of Alabama.

This takeover of the market by Bunnings really has two parts. One part is what Bunnings did, and the other part has been what we might describe as the somewhat lacklustre response to that competition by the independent retailers.

As HardwareNews has covered in the past, the everyday low prices (EDLP) model adopted by Bunnings wasn’t just about giving consumers what they wanted, it was also strategically designed to create competitive difficulties. The timing of its introduction was near-perfect, coming at the conjunction of the end of most tariffs in Australia, and the development of more reliable manufacturing in China.

In terms of the market, EDLP works because it establishes a low-level, reliable baseline to purchases. EDLP is popular with larger retailers because their business models are based on high-volume sales, so that price reductions that result in more sales at lower margins make sense — and that’s what EDLP delivers.

The early argument made by independent retailers — which still persists today — is that they could justify higher prices by providing better, more congenial service. We’ve referred to this from time-to-time as the “pub” concept of a business model. It relies on being smaller, closer and nicer.

Unfortunately, while that might work in hospitality, it really doesn’t work in hardware retailing — or doesn’t work enough. Realising this, independent retailers began to concentrate on reducing their prices to get close to those offered at Bunnings.

They were largely successful at this. Metcash leveraged its wholesale warehouse capital investment and expertise, and promoted this as a major advantage in getting independent retailers to sign on to one of the IHG brands.

However, other hardware buying groups were very successful at matching those same prices. Where warehouses might have granted Metcash some cost advantages, they also represented sunk capital that had to generate return on investment. Hardware buying groups had neither those costs, nor the obligation to generate returns for shareholders. They relied on skilled negotiation coupled with easy logistics.

Without those efforts the Bunnings/non-Bunnings chart would look a lot worse. But it’s also the case that those efforts alone simply have not been enough.

The final test of that has been what has happened post-COVID. Multiple sources in independent hardware retail suggested that the (forced) influx of customers to independent hardware retailers over COVID would result in longer-term growth.

Didn’t happen. To re-quote the numbers we’ve mentioned elsewhere: In inflation-adjusted terms, non-Bunnings revenue in FY2019 was \$9.34 billion, reached a peak of \$10.04 billion in FY2022, and in FY2024 non-Bunnings revenue was back down to \$8.34 billion — below the pre-COVID numbers.

What really has happened is that independent hardware retailers have shaped themselves into better competitors with Bunnings — but that competition has resulted in their resembling Bunnings.

Bunnings is always going to be better at being Bunnings than anyone else. The prices might be close to each other, but Bunnings has a vast advantage in size and range.

Bunnings growth

On top of all this, the additional problem is that Bunnings is facing very strong pressure to grow at a rate at least over 6.0% a year. Some of this, to be fair to Bunnings, is simply non-sensical, and relates more to how share markets work than how business should work. Though, again, some of this is of its own making.



Bunnings' expanded automotive range

ANALYSIS

It's common sense that the retail sales bonanza for hardware (and supermarkets) that resulted from COVID would be short-lived. However, corporations were not about to say that, as they watched their share prices move upwards driven by better earnings.

Stereotypically, what should happen in this case is that the extra earnings get invested into acquisitions and expansions which then deliver increased earnings. Both acquisition efforts by Bunnings — Beaumont Tiles and Tool Kit Depot (TKD) — did not really drive earnings. The major contribution of TKD, if Wesfarmers is to be believed, has been to make Bunnings a little better.

The supermarkets also didn't make those investments successfully, and they've been left with the sole option of increasing prices to match previous earnings performance. The company in these sectors that has probably done the best acquisition job has been Metcash, with both Total Tools and Superior Foods.

Bunnings' response to these pressures has been to further intensify its existing hardware offering, as well as continuing expansion into trade sales. In FY2026, those expansions are going to hit independent hardware retailers forcefully.

Fighting back against EDLP

While there has been a lot of attention on how EDLP works as a competitive pricing strategy in the market, less effort has been spent on understanding why it is so successful with consumers.

In an academic paper entitled "Not Just About Price: Value perceptions and consumers' preferences between retailer pricing strategies" (link), Professors Chris Hydock and Luc Wathieu equate a preference for Hi-Lo pricing with consumers influenced by quality value, and EDLP with consumers influenced by what they term "taste".

If you think of something simple like ice-cream purchases, we can see how this works. If a consumer is focused on quality, they will likely be interested in a number of high-level brands, and will base their purchase on which one is discounted at any particular time.

Consumers not so concerned with highest quality are likely to adopt one particular brand which is sold at a consistent price. They are seeking an affordable pleasure, something that matches their "taste".

A hardware example might be DIY drills. An Ozito PXC drill offers a reliable low price with a known level of quality. It's not great, but it gets the job done.

A drill such as Bosch's AdvancedDrill 18 cordless brushless drill sells for close to twice the price of a basic Ozito PXC drill. Yet it offers a range of features tailored to the needs of DIYers, such as magnetically attaching chucks, including a right-angle and another for screws. Hi-Lo pricing works for the Bosch, because it sends quality signals to the consumer — it's something of a treat.

Bunnings is always going to win selling the Ozito-style product. But, Bunnings would struggle with the Bosch DIY drill for a number of reasons — it needs to be explained, and it doesn't fit into the Bunnings volume-based selling of very basic tools.

There are, however, very, very few hardware retailers in Australia that have been able to make the shift from taste to quality.

That's not for economic reasons, either — it's strictly cultural. They appear to offer consumer choice, but it's really consumer choice that takes place in an existing framework of assumptions.

The primary assumption is that the way tradies do things is some kind of gold standard to which DIYers should aspire. This is, of course, nonsense. For one thing, tradies are naturally gifted at their trade. For another, their

ways of doing things are based on

behaviours and skill learned through years of practice. DIYers might need to do a particular task only two or three times in their entire lives. Even with more common tasks, they might just do them once or twice a year. Obviously they will need a different set of tools and techniques to achieve their tasks successfully.

While that's obvious, it is something that culturally cannot be understood by most of Australia's hardware retailers. In fact, it's quite likely that five years from now we'll see a situation where Bunnings now controls over 75% of the market. At least, though, independent retailers will be saved from having to face that fact, as the Australian Bureau of Statistics is discontinuing its hardware retail stats.



Bosch Advanced Drill 18