## CONTENTS

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Values &amp; Corporate Objectives</td>
<td>4</td>
</tr>
<tr>
<td>Financial Performance</td>
<td>6</td>
</tr>
<tr>
<td>Our History</td>
<td>6</td>
</tr>
<tr>
<td>Sustainability and Ethics</td>
<td>7-8</td>
</tr>
<tr>
<td>Product Portfolio</td>
<td>9-10</td>
</tr>
<tr>
<td>Scapes</td>
<td>11</td>
</tr>
<tr>
<td>Marshalls 360</td>
<td>12</td>
</tr>
<tr>
<td>Supply Chain Accreditation</td>
<td>13</td>
</tr>
<tr>
<td>Distribution &amp; Logistics</td>
<td>14</td>
</tr>
<tr>
<td>Manufacturing Locations &amp; Business Units</td>
<td>15</td>
</tr>
<tr>
<td>Project Management</td>
<td>16</td>
</tr>
<tr>
<td>Case Studies</td>
<td>17-22</td>
</tr>
</tbody>
</table>
The UK's Leading Hard Landscaping Manufacturer

Marshalls is the UK's leading hard landscaping manufacturer and has been supplying superior natural stone and innovative concrete products to the construction, home improvement and landscape markets since the 1890s.

Marshalls has become synonymous with quality; supplying prestigious landmarks such as Trafalgar Square, whilst also caring for the environment and communities in which it operates.

Marshalls believes that the better our environment, the better we can be and strives to create products that improve our landscapes and create happier and healthier communities.

What we are and what we do

Public Sector and Commercial
Interiors, gardens, seating and landscapes

Marshalls is the leading innovator of hard landscaping solutions for the commercial construction sector, placing a focus on developing new and innovative products. Marshalls focuses on developing products which help architects, local authorities and contractors to create better spaces, whether it is street furniture, natural stone paving for the internal or external environment, concrete block paving, water management or protective street furniture products.

Customers
Local authorities, commercial architects, specifiers, contractors, housebuilders and builders merchants.

Products
Paving, block paving, kerbs, water management, natural stone cladding, street furniture, lighting, protective street furniture, walling and mortars.

Domestic
Interiors, gardens and driveways

Marshalls’ Domestic customers range from DIY enthusiasts to professional landscapers, driveway installers and garden designers. Sales continue to be driven through the Marshalls Register of Accredited Landscapers and Driveway Installers. For homeowners, Marshalls offers the inspiration they need for their garden and driveway projects.

Customers
National and independent builders merchants, DIY groups, professional landscapers, garden designers and patio and driveway installers.

Products
Paving, block paving, paths, edgings, walling and decorative aggregates.

What makes us different

Our customer service
The Group’s national network of manufacturing and regional centres makes Marshalls the only truly national supplier. We maintain industry-leading standards of product quality, availability and “on-time” delivery.

Our quality
The Group remains committed to producing new quality products that are better than any existing market offering.

Our technical expertise
The Group is committed to excellence and our skilled engineers and technicians provide competitive advantage. Marshalls has a world-class Manufacturing, Innovation and Development team.

Our production innovation
The Group's commitment to innovation and the development of new products and solutions has led to several product patents and provides an industry-leading new product design pipeline.

Our capital structure
The Group has a strong balance sheet and a clear capital allocation strategy. Our capital structure is aligned with the strategic objectives.

Our standards
The Group is a benchmark for excellence and a leader in its field. Marshalls has been rated a Business Superbrand every year since 2010. Superbrands is an annual initiative to identify and celebrate Britain’s strongest consumer and business-to-business brands.

Our employees
The Group continues to promote a pay and rewards structure and exceeds the “Living Wage Employer” criteria. The number of younger apprentices the group employs has doubled in 2016 with a focus on “Early Careers”.

Our partner charity
The Group has partnered with mental health charity Mind and aims to raise £100,000 in 2017 through a series of fundraising initiatives involving Marshalls employees.
**FINANCIAL PERFORMANCE**

<table>
<thead>
<tr>
<th>Year</th>
<th>Revenue £m</th>
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<tr>
<td>16</td>
<td>396.9m</td>
</tr>
<tr>
<td>15</td>
<td>386.2</td>
</tr>
<tr>
<td>14</td>
<td>358.5</td>
</tr>
<tr>
<td>13</td>
<td>307.4</td>
</tr>
<tr>
<td>12</td>
<td>300.9</td>
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</tbody>
</table>

**SUSTAINABILITY AND ETHICS**

**Reducing CO₂ emissions**
Marshall is committed to reducing its carbon emissions and improving energy efficiency. There have been significant cuts in carbon emissions since 2008 through energy efficiency, investment and cultural change. Marshall was also the first company to publish the carbon footprint of all the products it makes in the UK.

**Protecting the environment**
Marshall is proud of the work it undertakes to restate and protect the natural environment of all its manufacturing sites. Sites are carefully managed to support local flora and fauna and the learnings are shared with environmental organisations and local communities.

**Ethical and sustainable products**
Ethical trading is at the heart of Marshall’s sourcing of natural stone from overseas. The Marshall’s Fairstone brand is your assurance that the stone is quarried and processed in line with the requirements of the Ethical Trading Initiative Base Code. Requirements include no child labour, the payment of living wages and safe working conditions for all.

**How we operate**

**Sourcing**
The Group makes very materials on cement, sand, aggregates, pigments, fuel oil and utilities. We use the best markets and suppliers. The ethical sourcing of natural stone from India, China and Brazil.

**Setting the standards**
Marshall is a benchmark for excellence and continues to be widely regarded as leader in its field. Marshall is proud to focus on market leaders and is dedicated to maintaining and consulting its position and being the supplier of choice for hard landscaping materials for public sector and commercial and domestic customers.

**Quality and service**
We strive to deliver products of quality and reliability. We are committed to providing new products that are better than any existing market offering.

**Responsible sourcing**
Marshall is proud to announce that we are the first company in our sector to be awarded BRE Global’s BES 6001 Responsible Sourcing certificate, under the new and more stringent standard and have received a ‘Very Good’ performance rating. The scope of the certificate (RS0008) is for a range of concrete, UK quarried natural stone paving, cladding and facades. There are a number of key differences to the revised certificate launched in May 2014 making the scheme a more robust test of a product’s responsible sourcing characteristics. We continue to commit to the principles of responsible sourcing, covering social, environmental and economic principles of which this standard forms an important part.

**Ethical Risk Index**
The Marshall’s Ethical Risk Index (ERI) is the next step on the journey toward full supply chain transparency in the Natural Stone sector. Using a bespoke, independently audited scoring framework, customers are given a genuine insight into the multi-dimensional ethical challenges facing stone procurers; with the aim of apprising users of potential issues and with a clear rating system to allow for more informed decision making.

As a major plc, Marshall is committed to quality in everything it does, including environmental and ethical best practice and continues to improve health and safety performance for the benefit of its 2,000 strong workforce.

The Marshall group operates quarries and manufacturing sites throughout the UK as well having sites throughout the world. The company expanded into Europe with Marshall NV – which supplies products to Benelux, France and Germany and in 2012 Marshall announced the opening of its China office in Xiamen, to service the Asian market. Marshall remains the market leader in its sector.

Marshall also has a number of other brands which operate under its umbrella, namely Stonemarkeet a brand at the cutting edge of hard landscaping product development, Marshall Premier Mortars, which is one of the UK’s largest independent suppliers of mortars, screeds & renderers and lastly Marshall’s Tile & Stone Interiors a specialist business with an extensive range of wall and floor tiles in a variety of materials including limestone, slate, travertine and porcelain.
Modern Slavery

Marshall was among the first to publish its Modern Slavery Disclosure Statement in May 2016. In it we identified six focus areas for which we have developed specific key performance indicators throughout 2016; these are included in our second statement from May 2017.

The requirements of the Modern Slavery Act, underscored by the findings of the 2016 Global Slavery Index which estimates that 43.8 million people are in some form of slavery in 167 countries, puts the onus on businesses to demonstrate exactly how they are taking positive action to eliminate modern slavery within their operations and global supply chains, none more so than within the construction sector.

The six areas that Marshall has identified are as follows:

- Deliver an internal awareness campaign throughout all UK operations to all employees regarding modern slavery.
- Modern slavery training for all employees involved directly in supply chains and procurement.
- Supplier communication and verification programmes which continue to embed the key elements of Marshall’s Modern Slavery Policy & Discloser Statement.
- Further develop the framework for supplier audits and embed human rights principles and procedures in supply chain management.
- Develop a comprehensive strategy to identify, remediate and support suppliers impacted by modern slavery.
- Develop a comprehensive strategy to identify, remediate and support suppliers impacted by modern slavery.

Ethical Labour Sourcing

Marshall was the first organisation to achieve verification against the Ethical Labour Sourcing Standard (BES 6002). The achievement demonstrates Marshall’s dedication in delivering against the Modern Slavery statement commitments. It’s also a clear demonstration of how embedded within the organisation the issues of ethical labour, ethical supply chain and modern slavery are. It’s part of the day-to-day work across the business whatever the job title or function.

The Ethical Labour Sourcing standard was developed throughout 2016 with a wide stakeholder group including clients, manufacturers, NGOs and contractors. The 150 strong stakeholder group helped to shape and scope the ELS standard to ensure that it would be relevant and drive positive change within industry. The verification approach will allow organisations to develop their ethical labour sourcing practices in a manner which is risk based and relevant to them.

For more information and to download the Marshall Modern Slavery Statement, please visit www.marshall.co.uk
WATER MANAGEMENT
A sustainable solution for every water management issue is achievable with Marshalls drainage products from versatile Linear drainage, combined kerb and drainage and permeable flag and block paving.

LANDSCAPE FURNITURE
Ranges and materials too numerous to mention here, visit the website to review them all: bollards, rails, seating, lighting, benches, bins, signs and planters. For practical, coordinated, decorative or protective solutions.

LANDSCAPE PROTECTION
All levels of protection for the landscape from post and rail and standard bollards to crash tested PAS68 and WA14 certified products.

SCAPES
Our expertise in understanding the specific needs of different business sectors is demonstrated in our series of “Scapes” brochures. This expansive range of documents focuses on specific requirements of six key industries.

In each “Scape” we offer valuable product insights and project specific design advice to architects, engineers and clients.

The product options and guidance offered is based on our extensive understanding of the landscaping needs of particular industries. Each Scape contains topical issues, expert opinion, case studies and a selected product portfolio that suit the respective environments.

Cycle – Sustainable transport is a growing area. Shared space and town planning initiatives require innovative Street Furniture and Hard landscaping solutions to give

Retail – From the local high street to major retail parks, hard landscaping, street furniture and landscape protection are all necessary to create a well-designed, functional space.

Education – From scooter racks for primary schools to drainage and hard landscaping for large university campuses, Marshalls cover the education sector with a range of especially designed products.

Industry – From high capacity drainage channels to landscape protection and permeable paving, Marshalls offer a dedicated product range suited to a more functional and cost-effective requirement.

Premier Mortars, Walling & Screeds
Marshalls provides a wide range of Exterior Reconstituted Stone walling products, ready to use mortars and ready-to-lay floor levelling screeds.

NATURAL STONE
Marshalls’ Natural Stone product portfolio incorporates Natural Stone paving, Masonry & Facades and Aggregates. These originate from Marshalls’ own quarries and an established international supply chain.

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Home
In his address to Parliament the Housing Minister stated the urgent need to build more homes in the UK not only because the demographic imperative demands it, but also that the house building industry can significantly contribute to a sustainable economic recovery. Marshalls are a full solution provider on housing schemes providing products covering the following categories:

- Concrete Flag Paving
- Concrete Block Paving
- Natural Stone Paving
- Drainage
- Street Furniture
- Walling
- Mortars & Screeds

Download selections from or complete documents from the Marshalls brochure library on the website.
www.marshalls.co.uk/commercial/brochures
Marshalls will be periodically adding new “Scapes” which will be flagged on the website as they are published.

These are but a few of the considerable library we publish on every topic concerning hard landscaping from sustainable drainage design to CPD seminars.
MARSHALLS 360

MARSHALLS 360 brings together our design, technical, engineering and consultancy expertise to offer you a support programme like no other. With a full suite of services, all designed around you, Marshalls 360 helps you add certainty to each and every project – all for no additional cost.

PRE-CONSTRUCTION
Marshalls offer pre-design and pre-construction site appraisals to identify and advise on the design and construction issues that could impact on the hard landscaping and drainage elements of your project. We can also provide advice around on-site testing requirements for subgrade permeability and strength.

ENGINEERING & DESIGN
A team of category specific engineers are on hand to offer expertise in technical cost modelling to ensure value is a key consideration in the decision making process. Marshalls’ in-house design team offer 3D modelling capabilities covering Sketch Up, Level 2 BIM Modelling and CAD drawings. The design team are also able to assist with the following:
• Structural Pavement Design
• Permeable Pavement Design
• Linear Drainage Design
• Perimeter Protection Design
• Vehicle Mitigation Design

DELIVERY
Once a project is underway, Marshalls offer a number of services to help things run more smoothly. From design workshops, CPO training and toolbox talks right the way through to project management an installer liaison, Marshalls are so much more than a product manufacturer.

MARSHALLS DESIGN SPACE
The Marshalls Design Space is an exclusive venue for architects and design professionals. It’s a space to explore and experiment with materials, colours and textures. It’s a space where imagination comes alive, and with a calendar of events, guest speakers and CPO seminars, it’s a space to learn too.
Find out more: www.marshalls.co.uk/designspace

SUPPLY CHAIN ACCREDITATION

Marshalls will supply all information and certificates necessary for supply chain qualification purposes including:

Sustainability & Ethics
- BES 6001
- BES 6002
- ISO 14001
- Business in the Community FTSE4Good
- Ethical Trading Index
- Ethical Risk Index
- Sustainability School Gold Member
- Carbon Footprinting
- Modern Slavery

Quality
- ISO 9001
- Made In Britain
- Quality Management Systems
- FSC Certified Products

Logistics & Supply chain
- FORS Gold Member
- Achilles certification
- Insurance / Professional Indemnity Policies
- Builders Profile Online

People
- Business in the Community
- Living Wage Employer
- Investors In People
- Mind Partner Charity
- Equal Opportunities Policy
- CSR Policy
- Health and Safety Policies
- Human Rights Policies
- Women’s Empowerment In Business

Finance
- Fair Tax Certified
- Living Wage Employer
DISTRIBUTION & LOGISTICS

With customer service at its heart, Marshalls continues to invest in logistics when others have cut back, ensuring that the company has the capability to continue to deliver products to our customers when, where and how they want them.

- 180 vehicles in total, state of the art and fully equipped
- Moffett trucks available
- 5 Central Planning heads
- State of the art logistics software
- Vehicles GPRS enabled and trackable allowing positional updates every 2 minutes
- Vehicle status and Sales demand optimised every 15 minutes
- FORS Gold Member
- Experience and expertise in on-site manual handling

MANUFACTURING LOCATIONS & BUSINESS UNITS

Marshalls has manufacturing plants, quarries and distribution sites across the UK and a site in Belgium.

Due to its vast operations, 97% of Marshalls customers are within a two hour drive of one of its UK sites. This continues to be a key competitive advantage.

Marshalls invests in cutting-edge machinery to continue to produce products for both the public sector and commercial and domestic end markets.

The company is committed to achieving the highest standards of environmental performance and works to minimise the environmental impacts of its operations on site, ensuring that all of its operations meet, or exceed the requirements of legislation and applicable best practice.

Each operating site is assessed on its activities on an annual basis and objectives and targets are set with the view to improve the environmental performance each year.
PROJECT MANAGEMENT

Marshalls has outstanding experience in the delivery of major projects, across all of its business units. The most significant and integrated project we have delivered to date is the London 2012 Olympic & Paralympic Games, to which we delivered in excess of £10m of products and solutions over 51 different contracts and logged more than 400 hours of design time. Our full Olympic case study can be viewed at: www.marshalls.co.uk/casestudies

Our Project Management services are regularly offered, free of charge, to support the complete construction cycle from outline design to installation and can include:

- An appointed Project Manager
- Design & Technical Services
- Value Engineering
- Product scheduling
- Logistics support
- Sub contractor liaison
- Third party supplier liaison
- Product samples
- Installation advice
- Mechanical handling solutions

Query/Invoice resolution its operations meet, or exceed the requirements of legislation and applicable best practice.

Each operating site is assessed on its activities on an annual basis and objectives and targets are set with the view to improve the environmental performance each year.

THE BROADWAY, BRADFORD
Street Furniture and Natural Stone

For the multi-million pound development of a new shopping complex in Bradford, Marshalls were commissioned to supply the natural stone paving, street furniture and drainage around the perimeter of the site. Utilising a blend of Scouthead and Cambrian Sandstone, the result is an exquisite mix of tones and textures offering delineation throughout the project and tying together the heritage of the surrounding buildings. The addition of protective street furniture including bollards, cycle stands and post and rail compliment the centre’s modern aesthetic with a sleek stainless steel finish.
WINNERSH TRIANGLE, WOKINGHAM
Natural Stone, Paving & Water Management

Winnersh Triangle is an 85 acre business park based in Wokingham and is home to more than 50 businesses. For the park’s development, Marshalls were commissioned to supply a number of products from the natural stone and paving ranges including Scourmoor Yorkstone, Calista Granite, Mistral paving and coordinated Mistral Praxis paving. Bespoke granite walling coordinates perfectly with timber clad granite benches to create a social seating area that can be utilised by business park users.

PORTAKABIN LTD, SOMERSET
Paving & Water Management

In 2012, while planning a new hire depot site in Somerset, Portakabin were faced with some potentially difficult drainage requirements. In response to severe flooding issues encountered in the area, The Environment Agency insisted that rainwater that fell on the site was attenuated at source, with any runoff released at a restricted rate of just 5 litres per second. Another consideration was the extensive loading as the site could potentially be trafficked by cranes of up to 200 tonnes. Concerns were initially raised over Praxis ability to withstand heavy loading but four years on, the system is still performing as planned. Despite regularly taking loads in excess of 150 tonnes, the surface shows no signs of fatigue and demonstrates no surface water flooding.
M1 MOTORWAY - JUNCTIONS 28-31

Water Management

Marshalls supplied 15,000 linear metres of Mono Beany one-piece combined kerb and drainage to the new M1 smart motorway scheme. Mono Beany, made with ultra-tough M-tech concrete, is Marshalls' first one-piece combined kerb and drainage system which has been proven to significantly reduce installation time. This innovative product is available in two depths which both have a recycled inner plastic core to provide hydraulic flow benefits at low and medium capacities. Each one metre unit can carry up to 40 tonnes (Class D400) when trafficked. The inlet apertures are divergent and angled at 45° to prevent blockages and maximise drainage efficiency. These features ensure surface water is cleared rapidly and internal flow is smooth and efficient. The hydraulic capacity requirements varied along the run and therefore a mix of Mono Beany 321 and 502 units were required as this was deemed more cost-effective. Marshalls also used its expertise to develop a new transition unit to complete the M1 scheme as part of the Highways Agency’s focus on innovation. This was developed in order to create a smooth hydraulic transition from a 502 to a 321 Mono Beany unit, which reduced the hydraulic capacity, while coming within budget.

ELEPHANT AND CASTLE, LONDON

Street Furniture

As part of a £1bn redevelopment programme in Elephant and Castle, the area is being transformed into an exciting new destination for London over the next 15 years. The regeneration includes transforming the wasted space in Elephant and Castle into a usable, thriving public space, including a pedestrianised town centre, market square, and new green spaces. Marshalls were commissioned to design and manufacture a range of bespoke seats to enable the transformation of a new social seating area. The result was a selection of contemporary benches with legs manufactured from cast aluminium, finished with high quality iroko timber.
KINGSMEAD BUSINESS PARK, HIGH WYCOMBE
Paving and Street Furniture

Kingsmead Business Park in High Wycombe provides an ideal environment for today’s businesses, with some 150,000ft² of flexible office space and excellent transport links.

Marshalls hard landscaping products were specified for installation around the new café area, in the car park and at the entrance to the business park. La Linia was selected for the pedestrian areas around the café and in the car park.

La Linia paving was complemented by the use of Conservation Textured Kerb and Textured Edgings with a similar granite look, used along pathways and demarcation zones to complement the soft landscaping. In addition, products from Marshalls Belitalia range were selected for the outdoor seating area, including the Demetra Peciosus Stone Bench with Wooden Slats, a contemporary offering which features a self levelling system for ground slopes up to 6% for a natural touch, complemented by matching Belitalia planters.

Marshalls hard landscaping products have played an important role improving aesthetics, creating attractive seating areas and contributing to improved facilities for tenants and visitors alike.