



“Without doubt the supply chain isn't working. It creates problems for the consumer”

It takes a bold man to make such a statement, and then strive to do something about it. Our industry just might have that man in Nigel Smailes

This story begins last autumn, when NCC Director General John Lally said he was pulling together a forum across the supply chain – to involve suppliers, manufacturers, dealers and park operators – to talk about what's wrong with the supply chain, and why it isn't working as successfully as it should.

Nigel Smailes, managing director of leading doors and windows supplier Ellbee, was there. He says: “I sat and listened to how dreadful the industry was and where were the consumers, and all this sort of thing. But nobody was prepared to shake it up and do anything about it.

“I said something along the lines of: the answer's in this room. We have to stop talking about it and actually do what we say we're going to do, and hold each other to account, and give the consumer what we sell them – because we're very good at selling them the dream. But, we don't consistently deliver that or provide a service when problems arise”

The upshot of that was Smailes was invited to make a presentation at this year's NCC conference. Arguably, the timing could not be better. The industry is facing the toughest of times, but that's when the opportunities are greatest to make changes.

Tough words for tough times? Yes, but Smailes is a genuinely good guy you can instantly warm to. Maybe that's what makes his determination to do well on behalf of the whole industry all the more poignant.

What is the supply chain, and what's wrong with it at the moment?

Our supply chain isn't extraordinary in any way. Supplier, manufacturer, distributor/park operator, consumer. There's nothing special about that – except, the journey that the product goes on from manufacturer to consumer is almost unique. Until a holiday home gets to the consumer and it's finally sited and in place, it's quite a big, complex wobbly box, that needs a lot of TLC.

I don't want to be parochial. The biggest risk I've got is talking about just windows and doors. But if we can get the message out that, for each part of the journey through the supply chain, when the product is in our custody, we have to accept responsibility for it's total condition, as though we were buying it. If we can get people to accept that, all the problems will go away. ▶

I embody the principle of the supply chain because of my background working with brands and so on. It has to be about the consumer and everything that goes on behind that has got to be focused on giving the consumer a good experience.

What's wrong with the supply chain?

It isn't a chain, because by definition a chain has to be linked and ours isn't. It has to be joined up so we can all take responsibility. How can it be improved? With some kind of standard warranty criteria.

There needs to be a professional uniform handover, it can't be ad hoc. I think it's that simple. I really do, and I



Who is...?

Nigel Smailes

Managing Director, Ellbee Ltd

After a successful career in the textile industry, Nigel Smailes joined Ellbee as sales and marketing director in 1997. He became managing director in 2006.

He is married (celebrating his 25th anniversary next year) with one son, Matthew, with whom he's just started playing badminton. Smailes describes this as "fantastic, because he's at the (young teenage) age where he really wants to compete. I used to play badminton for Yorkshire when I was younger, but of course the knees and the back gave out and I stopped a long time ago." He also used to ride motorbikes competitively.

However, he adds: "I'm playing golf again these days, and it's driving me insane."

think we've got a platform now where this is being debated.

If the industry starts getting well again, in two years' time, and we're still arguing about whose fault it is rather than seeking to be professional about it, we're really in trouble.

We've been a major supplier to the industry for over 50 years and yet we've never really had much of a voice within the industry, because the supply chain isn't joined up. We supply to the manufacturer and our involvement effectively stops.

That's why I'm so passionate about it. This is an opportunity to make a difference while we can.

How did you feel it went with your presentation at the NCC conference?

Actually, it was excellent because it gave us a platform to raise the issues where this industry has been lacking. John Lally enabled us to have that platform to get together and say: if we're all doing what we should do, the supply chain will work. And it's absolutely guaranteed if we don't do what we should and the supply chain doesn't work, then the consumer is guaranteed a bad experience.

So, is the supply chain worse in this industry than in others?

I can only talk from my own experience. Prior to coming to this industry I spent all my career in the textile industry in various businesses supplying home furnishings, fashion, performance fabrics...lots of different markets. But, particularly where brands were involved, the whole supply chain is very, very clearly focused on the consumer. People like Marks and Spencer do it best, and it's all about getting the consumer to tell their friends and come back and spend some more.

I think there's something missing in our supply chain. The competition means everyone's working with one hand behind their backs. The manufacturers won't tell us who their customers are. They don't want us having a voice. The dealers won't tell the manufacturers who the customers are. Everybody's suspicious.

What's the biggest problem?

Manufacturers won't co-operate to enforce a common warranty policy. For me, that's the biggest let-down. Yet, when you buy a car you get a professional handover of that car, even if you've only spent £8-10,000. You get a service book which is stamped to say it's been PDI'd. You sign to say you've had a professional handover, you've had all the working parts explained to you, etc.

The dealer then has to send that paperwork back to the manufacturer and that triggers the warranty.

That doesn't apply in this industry. And that, to me, is the biggest thing that we need to fix.

We need to get some kind of standard warranty criteria that isn't invoked until the supplying dealer or park do what they should do in line with the manufacturer's specification

Could the NCC have done more in the past?

I'm sure they would like to have. Certainly, it appears that the supply chain is every man for himself. If a manufacturer can get a sale by selling to someone who's got a field, they'll take the sale. The good parks are obviously doing it very well but, like secondhand car dealers, mud sticks. And that's something that we've all got to deal with.

What, if any, are the unique demands of the caravan industry?

From our perspective, it contrasts with the general building products market in the number of styles required. Because windows and doors – windows, particularly – are now used to differentiate holiday homes, there's an awful lot of different shapes and sizes that you wouldn't necessarily get if you were just supplying to the general building industry.

A domestic window fabricator probably only makes ten styles and a few sizes because most houses have three windows and door at the front, the same at the back. A caravan holiday home can have between ten and 20 windows, every one of them a different

"People like Marks and Spencer do it best, and it's all about getting the consumer to tell their friends and come back and spend some more"

size and shape, with lots of apexes and fancy glass options. And we're set up to do that.

What are the biggest challenges facing the industry over the coming years?

There's a dichotomy because the product is evolving and we're trying to bring ever higher specification and ever higher domestic features to these things. And yet, quite rightly, there's a real need for lower prices to bring more people in. There's going to come a tipping point, and I think the way around this – obviously in addition to product engineering, smarter materials, etc – lies in eliminating all the wasted costs.

The cost of poor customer service is something we would not wish to quantify – because I think we'd all be horrified. If we got it right first time, and didn't have to keep going out time and time again putting it right, we could probably all afford to give better value first time. That should be the motivation for the industry to work together.

People try to compare us to the car industry, but you can't because the volumes are so completely different. We still employ people to put caravans together, in the car industry it's all robotic.

But, I don't think it's difficult to compare us for customer service. If you've got a Ford or an Audi or a BMW and you've got a problem, you are faced by somebody talking about Ford, Audi or BMW. You don't get someone saying the window supplier's the problem, or the carpet supplier's rubbish etc. BMW will stand there and say: "I'm really sorry, sir. Just let me have your service book. Yes, that's all correct, now let's talk about the problem." And they give you a seamless service. We can certainly aspire to that.

How do you see the supply chain changing over the next ten years?

I wouldn't pretend to be the oracle. Given the last six to nine months, who'd have predicted that? Let's get through the next two years, and you can ask me again.

What happens when it's sorted?

Well, you can never stop, can you? You can never stand still. When I joined the industry, we were really only supplying tin boxes that people rented for two weeks at a time and didn't really notice the finer details: it was just a cheap holiday.

Now the product has evolved to



Ellbee: the story so far

Ellbee is part of the Euramax International Inc group of companies, specialising in aluminium and uPVC windows and doors, plus shower enclosures, extrusions and more.

Based in Pudsey, West Yorkshire, and just 70 miles from caravan epicentre Hull, Ellbee has been a major supplier to the UK holiday home and tourer markets for over 50 years. It currently supplies some 70 per cent of the UK market for uPVC and aluminium windows and doors. All its manufacturing takes place in-house – including injection moulding, anodising, powder coating, and making its own double-glazed units.

As well as specialising in the caravan market, Ellbee is the UK's third largest shower manufacturer and largest door manufacturer within its sector, supplying the latter to the likes of Wickes, Screwfix etc.

Says Nigel Smailes: "Because we're now quite a big player in the domestic market we are able to offer a very broad range of product types for our customers to choose from and customise it from there. We tend to have a good, better and best offer – three market positions for each of our product ranges."

Recently, Ellbee took over the sales responsibility for aluminium siding and roof coil from sister company here in the UK, Euramax Coated Products Ltd. It also says it is looking to: develop a line in lightweight, folding shower doors; regain "a good share" of the market for the supply of tourer exterior doors; bring in gutter products from Euramax in Canada, where it's the largest supplier of PVC guttering to the North American market; and introduce plastic cladding solutions from the USA.

"We're a well-funded group so if we can demonstrate payback the capital's usually available for new product development.

Smailes stresses: "We don't have a standard product. We offer unique solutions to our customers. Every single thing that we manufacture is unique to that particular 'van model. We deliver daily, batch-specific, to line side. We've got ultimate flexibility. We work with our customers to come up with new product each season. It's not take-it-or-leave it.

where, before the main part of the market collapsed, it was about people releasing equity from their first home and using these things as a residential second home. They've evolved from being a cheap tin box to being better

than most people's primary homes, so why shouldn't people expect to live the dream they were sold? ○

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