

“one **industry**  
one **voice**”

# Builders Merchant Building Index



Monthly report for April 2017

# Building the Industry & Building Brands from Knowledge



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Quarterly reports contain additional analysis, macro-economic factors and expert comments. Click the images below to read or download the Q1 report.

**Monthly and Quarterly Indices**  
March 2017 and Q1 2017

**Plumbing, Heating & Electrical - Quarterly**

**GfK Insights**  
Product group insights at feature by brand level are available. Enabling informed strategic and tactical decision making.

- Total Dispersible products make up 4.4% of total GfK sales
- Paint & Wallpaper is 31% of all Dispersible
- Total Paint category is worth £1.1bn in GfK
- Emulsion Paint is 65% of Total Paint, £32.5m
- White

**Macro factors impacting Merchants**

**Inflation**  
Consumer Prices Index (CPI) – 12 month % change

The Consumer Price Index (CPI) is a measure of the price of goods and services used to estimate inflation. UK government's target policy is to use the CPI for the indicator of benefits for credits and public service pensions.

The CPI increased by 2.3% in the year February 2017. This is the first time in over 3 years the rate has been above the indicator of benefits for credits and public service pensions.

7.8% (Mar 2016) → 2.5% (Dec 2016) → 2.3% (Feb 2017) → 2.0% (Mar 2017)

**Expert Panel Bricks**  
(part of Heavy Building Materials)

**Tony France, Sales Director IBSTOCK, is BMBI's Expert for Bricks.**

Demand for bricks has intensified significantly with GB manufactured product Q1 sales volume 20% ahead of Q2 2016. This continues a trend which started in August 2016 following a subdued July after the Brexit vote. In the eight months to the end of March 2017, compared with the corresponding period in 2016, GB manufactured brick sales volume rose by 20%.

There appears to be no imminent reduction in demand, indeed, industry brick sales volume in March was the highest in nine years.

This demand has been fuelled by a combination of two key factors: growing simultaneously. Firstly, developers have built more houses than would normally be expected due to a particularly strong market at the same time. Builders' merchants, who generally do stock bricks in 2016, are now returning to usual import purchasing levels as 2016 sales remain relatively strong.

In response to growth in demand, brick manufacturers are increasing production, but there are signs that products from certain factories are subject to extending availability periods. In contrast, there are significant stocks, especially of asphalt products, at many retailers, and potential additional capacity available if required.

So it's becoming increasingly important that merchants, distributors and developers work together to ensure that color questions and call-off schedules are as accurate as possible. This helps brick producers get more consistent lead times and be better able to fulfill customer requirements.

It's also vital that customers don't start panic buying and stock piling, as happened in 2015/16, as this exacerbates the problem. We advise to builders' merchants is to consider your stock levels requirements and place accurate schedules and call-offs for your key products for the rest of 2017.

While we expected brick sales to increase in 2017, actively predicted growth would be so high, it seems unlikely the current trend will continue at the same pace for the rest of the year. With improving production levels, more accurate scheduling and stock-to-operation and communication between all stakeholders, the balance of supply and demand should stabilize.

"Demand for bricks has intensified significantly with GB manufactured product Q1 sales volume 20% ahead of Q2 2016... Industry brick sales volume in March was the highest in nine years."

# Introduction



This Builders Merchant Building Index (BMBI) report contains data from GfK's ground-breaking Builders Merchants Panel, which analyses data from over 80% of generalist builders' merchants' sales throughout Great Britain. GfK's Builders Merchant Point of Sale Tracking Data sets a gold standard in reliable market trends. Unlike data from sources based on estimates, or sales from suppliers to the supply chain, this up-to-date data is based on actual sales from merchants to builders and other trades.

BMBI trend data is indexed on the 12 month period July 2014 to June 2015. The monthly series tracks what is happening in the market month by month and includes an in-depth review every quarter. This trend series gives the industry access to far more accurate and comprehensive insights than that available to other construction sectors.

MRA Marketing produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: Crystal Direct, Keylite Roof Windows, Timbmet, Alumasc Water Management Solutions, Hanson Cement, IKO PLC, Keystone Lintels, Knauf Insulation, Encon Insulation, Ibstock, Natural Paving Products and Heatrae Sadia, who provide valuable commentary on market trends and influences.

## **More data available**

This BMBI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and include sales value data. GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you.

GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in acquiring data or getting involved should contact Ricky Coombes at [Ricky.Coombes@gfk.com](mailto:Ricky.Coombes@gfk.com).

The BMBI website enables you to compare Landscaping trends with Heavy Building Materials, or Kitchens with Timber on our interactive charts.

Download the latest report, read the news or search through comments or blogs at [www.bmbi.co.uk](http://www.bmbi.co.uk). Follow us and the Experts [@theBMBI](https://twitter.com/theBMBI).

# Overview

## Total sales value down but fewer trading days in April show sales per day are up

### Year on year

This month's BMBI report reflects the impact of Easter falling in April this year, resulting in three fewer trading days compared with April 2016. So although total sales this April fell sharply year on year, average sales per day showed the largest annual increase in the 22 months we have been publishing the BMBI report.

Absolute sales in April 2017 were 6.3% lower, with all but two categories selling less. Heavy Building Materials, the largest category, was 6.6% lower, with Workwear & Safetywear (-11.6%) and Plumbing Heating & Electrical (-11.5%) weakest.

However, average sales per day in April were 9.3% higher than in April 2016 and all categories were up. Four did better than merchants generally, including Landscaping (+16.8%) and Ironmongery (+11.1%).

### Month on month

With five fewer trading days compared with March 2017, absolute sales in April fell 13.1% and only Landscaping (+6.6%) sold more.

April's average sales per day were 11.1% ahead of March, with Landscaping (+36.2%) strongest. Workwear & Safetywear was weakest (-4.7%) and one of only three categories to sell less per day.

### Other periods

The first four months of 2017 were 2.6% ahead of the same period in 2016 (+3.8% adjusted for trading days). The rolling 12 month period, May 2016 to April 2017, was 4.1% ahead of the same period a year earlier, on an identical number of trading days.

### Index

April's Builders Merchant Building Index was 106.7. Six categories had indices over 100, headed by Landscaping (138.1). Adjusted for trading days, April's index was 123.0 and all but two categories were above 100

For additional, deeper category insights and benchmarking please contact Ricky Coombes at GfK.

Although total sales this April fell sharply year on year, average sales per day showed the largest annual increase in the 22 months we have been publishing the BMBI report.

# The Expert Panel

## Speaking for their markets



The Builders Merchant Building Index (BMBI) includes a growing panel of industry Experts. In each quarterly report they comment on the market, with a particular focus on the story behind the trends. Experts are leading brands, or brands aspiring to become leaders, who are the voice of their markets.

The Q1 2017 report, which includes commentary from our experts is available [here](#)

### Meet the Builders Merchant Building Index Experts:

**Steve Halford**, Group Managing Director, Crystal Direct is BMBI's Expert for PVCU Windows and Doors



**Andrew Simpson**, National Commercial Director Hanson Cement is BMBI's Expert for Cement and Aggregates



**Mike Beard**, Merchant Development Director, Encon Insulation is BMBI's Expert for Insulation Products - Distribution



**John Duffin**, Managing Director, Keylite Roof Windows is BMBI's Expert for Roof Windows



**Andy Williamson**, Group Managing Director IKO PLC is BMBI's Expert for Roofing Products



**Tony France**, Sales Director, Ibstock is BMBI's Expert for Bricks



**Nigel Cox**, Managing Director, Timbmet is BMBI's Expert for Timber & Panel Products



**Derrick McFarland**, Managing Director, Keystone Lintels is BMBI's Expert for Steel Lintels



**Paul Rivett**, Managing Director, Heatrae Sadia is BMBI's Expert for Water Heating



**Steve Durdant-Hollamby**, Managing Director, AWMS is BMBI's Expert for Civils, Metal Rainwater & Drainage



**John Sinfield**, Managing Director, Knauf Insulation is BMBI's Expert for Mineral Wool Insulation



**Malcolm Gough**, Group Sales & Marketing Director, Natural Paving Products is BMBI's Expert for Natural Stone, Vitrified Paving & Artificial Grass



# Monthly: Index and Categories

## April 2016\* – April 2017

(Indexed on monthly average, July 2014 – June 2015)



		2016									2017			
VALUE EX VAT £	Index	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
<b>Total Builders Merchants</b>	<b>100</b>	<b>113.6</b>	<b>111.4</b>	<b>115.7</b>	<b>111.1</b>	<b>113.7</b>	<b>113.8</b>	<b>112.3</b>	<b>113.6</b>	<b>77.1</b>	<b>94.7</b>	<b>100.5</b>	<b>122.8</b>	<b>106.7</b>
Timber & Joinery Products	100	108.9	106.0	112.1	107.8	112.2	113.3	112.8	113.7	76.1	99.1	100.9	121.2	102.9
Heavy Building Materials	100	114.3	111.7	116.2	111.9	114.4	114.6	113.4	114.1	77.0	94.0	100.1	123.0	106.9
Decorating	100	107.5	105.4	108.1	107.8	112.5	109.8	108.3	110.4	76.3	92.8	97.0	115.6	98.8
Tools	100	106.9	99.8	104.0	101.5	102.4	104.6	106.5	111.3	74.8	97.6	101.7	120.7	97.2
Workwear & Safetywear	100	96.3	96.5	107.6	98.5	98.6	101.0	110.9	133.2	72.6	109.5	102.7	114.1	85.1
Ironmongery	100	112.8	110.9	112.8	111.0	115.8	119.8	118.0	119.9	84.6	107.5	109.4	129.2	107.5
Landscaping	100	137.7	144.2	144.7	132.0	129.2	119.9	110.2	97.2	62.4	71.0	87.7	129.5	138.1
Plumbing, Heating & Electrical	100	110.8	101.4	103.3	100.5	103.6	111.7	116.0	132.4	94.0	114.9	116.1	128.7	98.3
Renewables & Water Saving	100	67.1	64.8	75.5	63.7	63.1	72.8	61.2	73.4	42.4	68.1	76.2	90.3	68.2
Kitchens & Bathrooms	100	106.7	98.0	107.6	101.7	105.3	111.4	109.4	121.7	83.8	98.1	110.2	123.6	99.3
Miscellaneous	100	113.1	107.4	113.3	115.3	114.5	115.7	113.6	122.2	92.6	113.2	108.8	124.4	103.4
Services	100	111.3	116.7	116.1	115.5	115.2	111.1	108.3	107.1	81.3	87.8	95.0	115.0	100.6

\*Click the web link below to see the complete series of indices from July 2015.


**Source: GfK's**  
 Builders Merchants  
 Total Category Report  
 July 2015 to April 2017

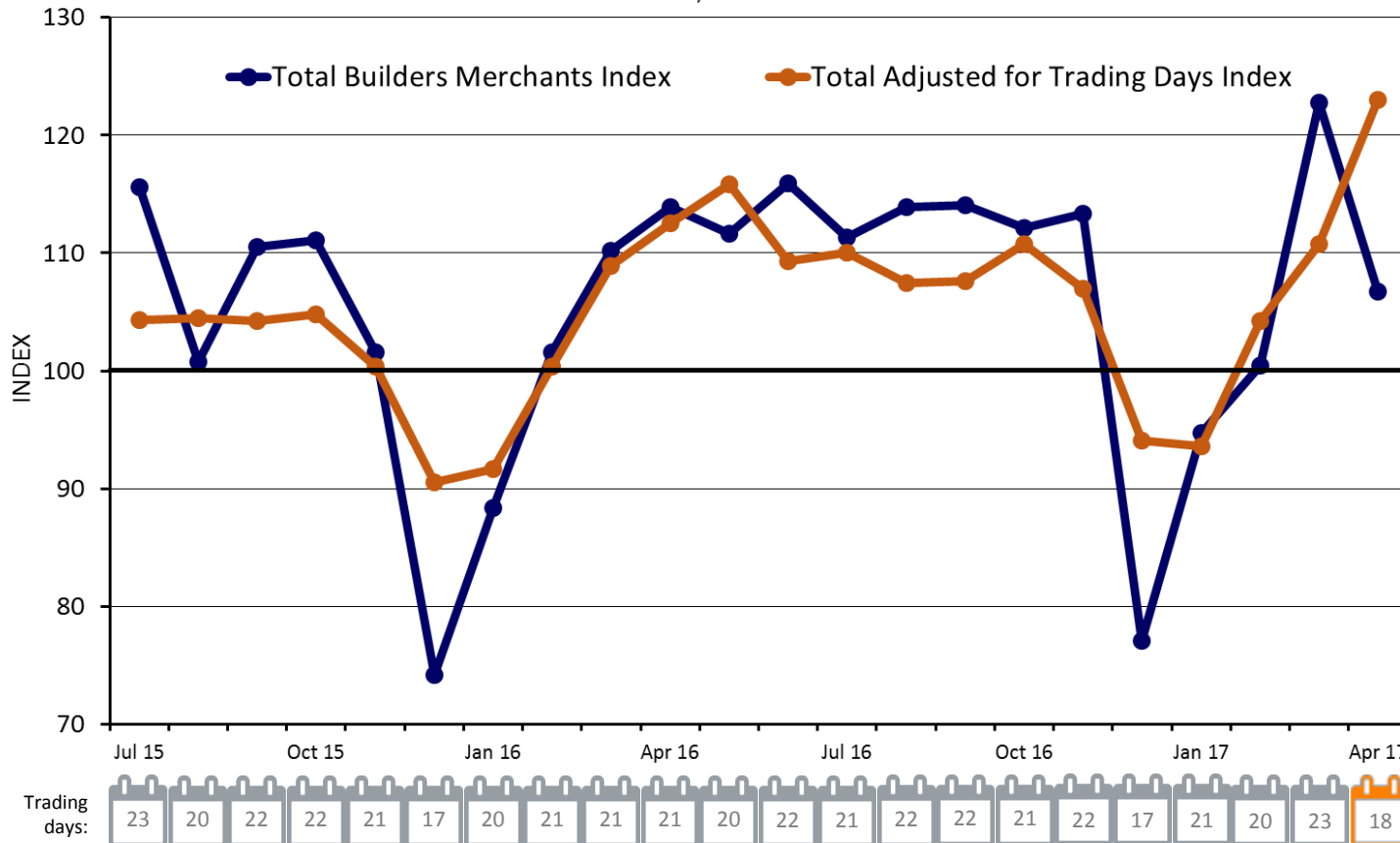


# Monthly: Index

## Adjusted and unadjusted for trading days

### Total Builders Merchants Index v Total Adjusted for Trading Days Index

Indexed on July 2014 - June 2015



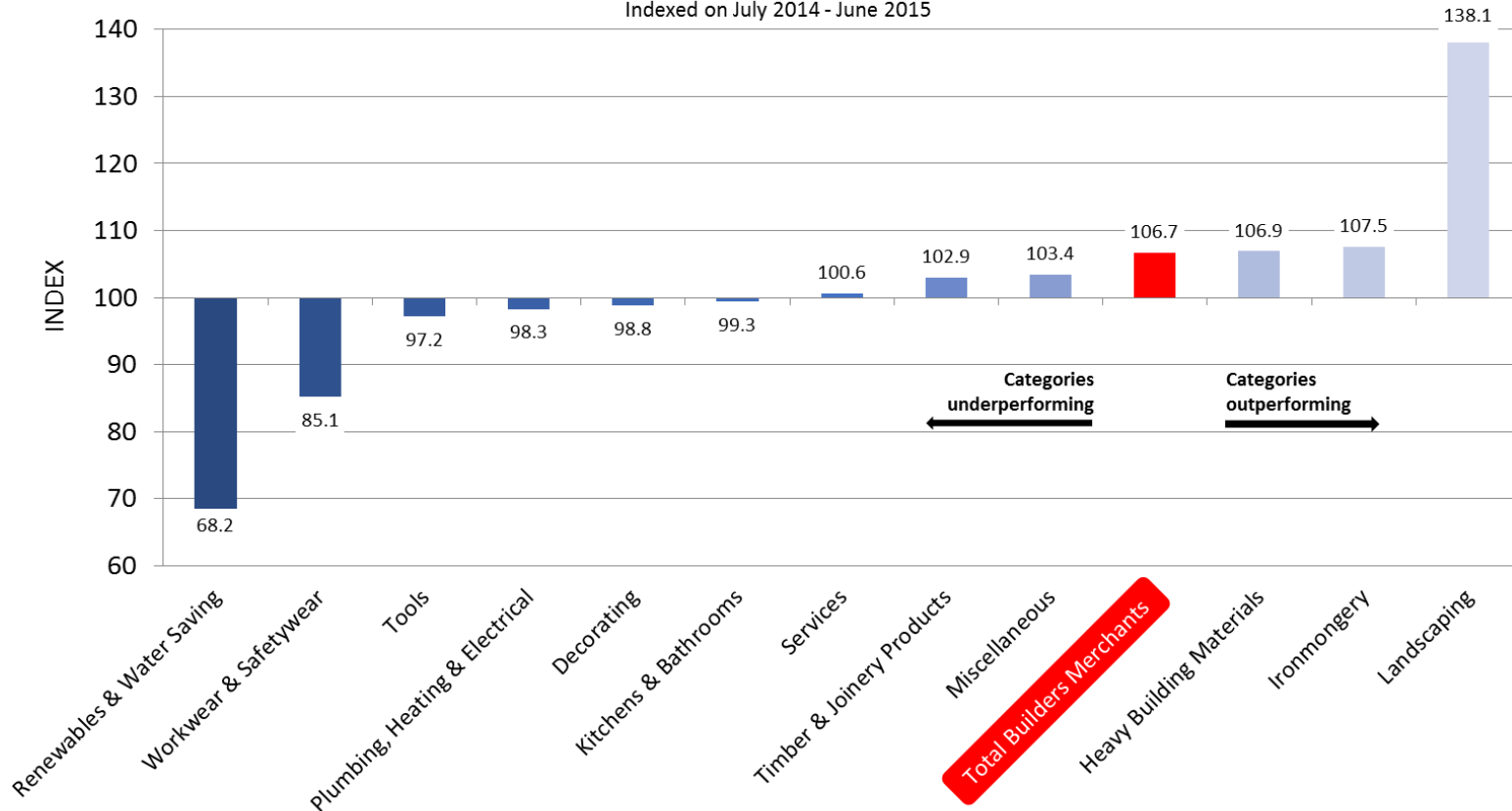
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly: Index and Categories

## April 2017 index

### April 2017 Index

Indexed on July 2014 - June 2015

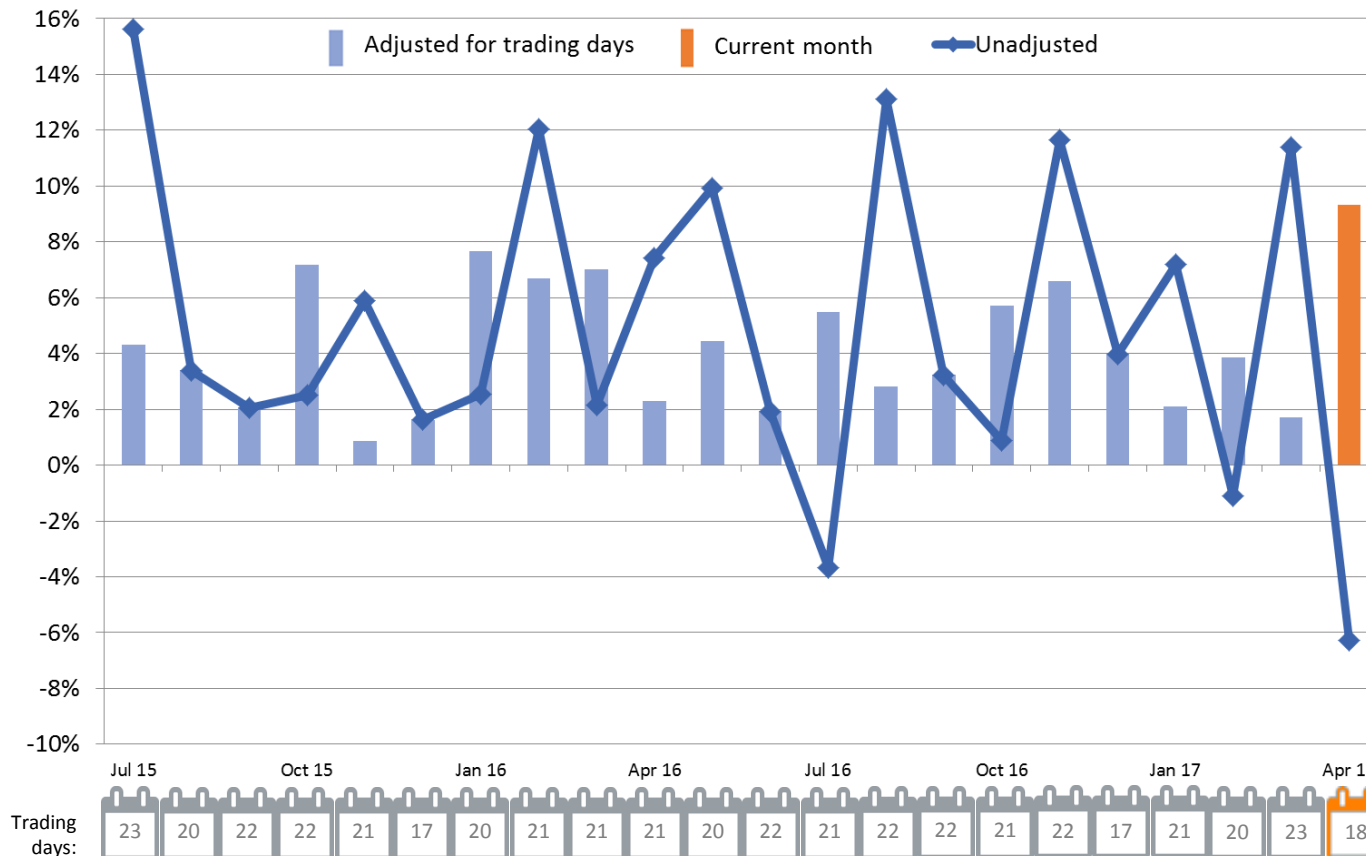


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year

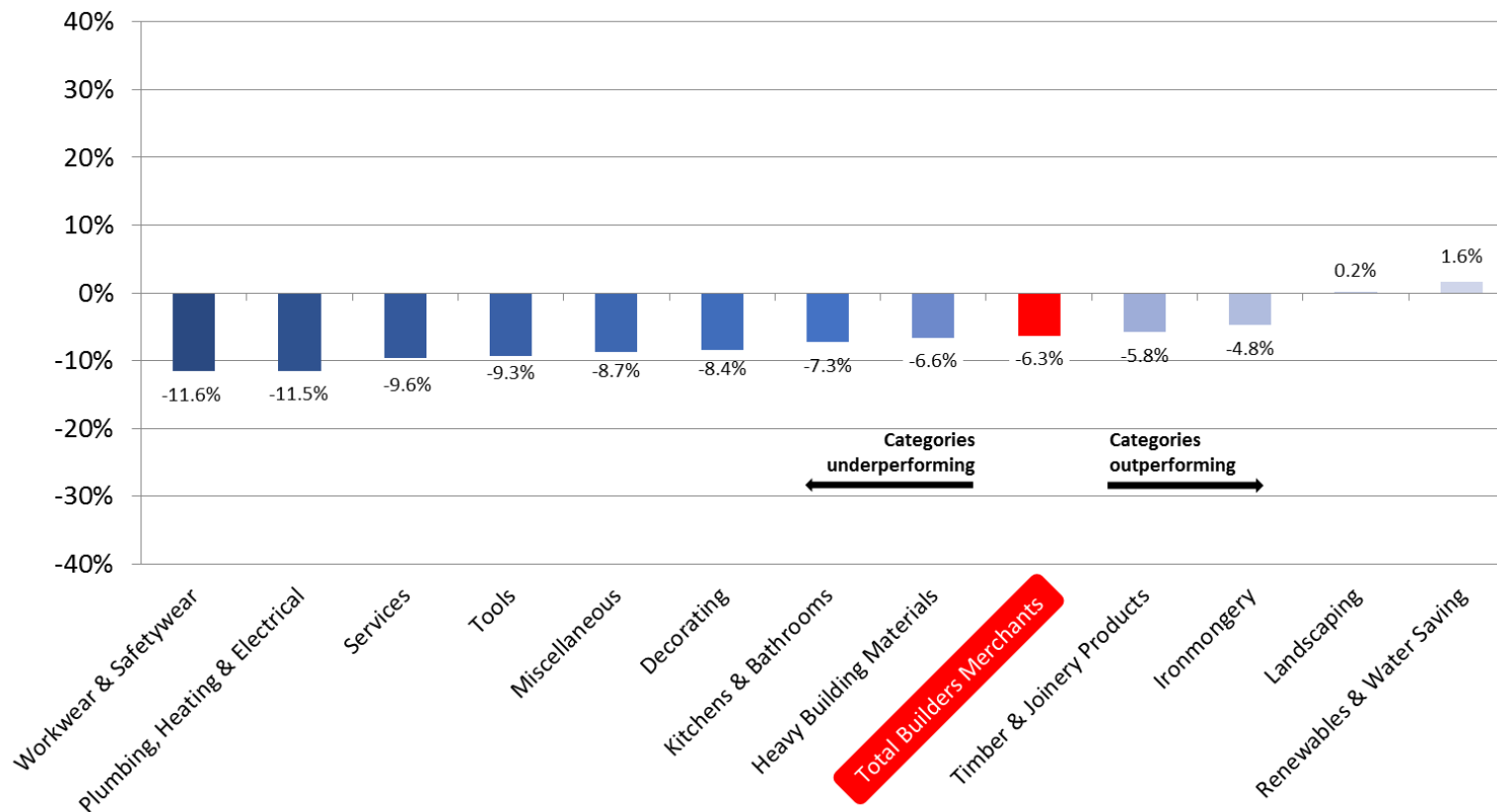


 Source: GfK's Builders Merchants Total Category Report July 2015 to April 2017

# Monthly: this year v last year

## April 2017 sales indices

### April 2017 index v April 2016 index



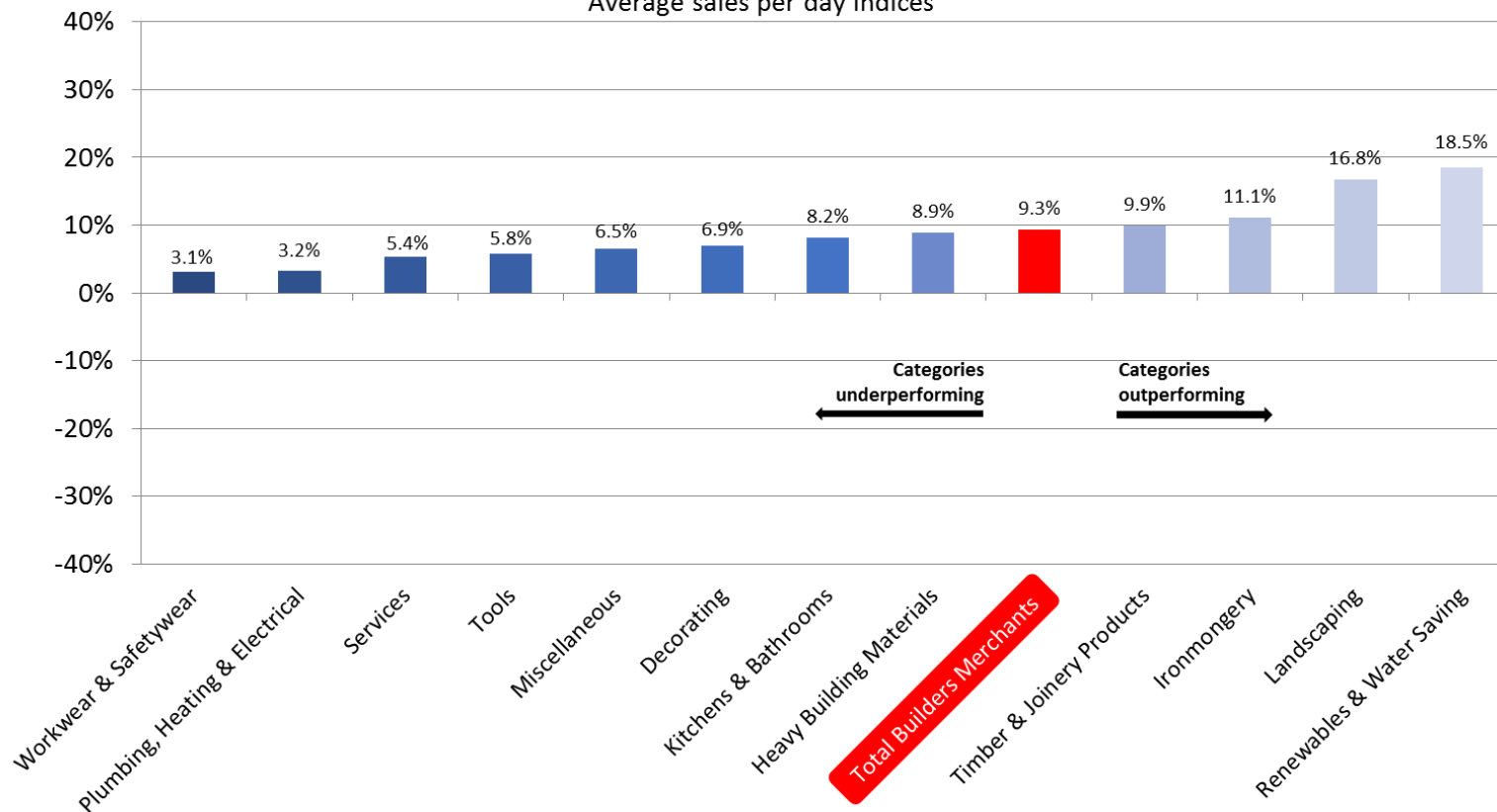
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly: this year v last year

## April 2017 average sales per day indices

### April 2017 index v April 2016 index

Average sales per day indices

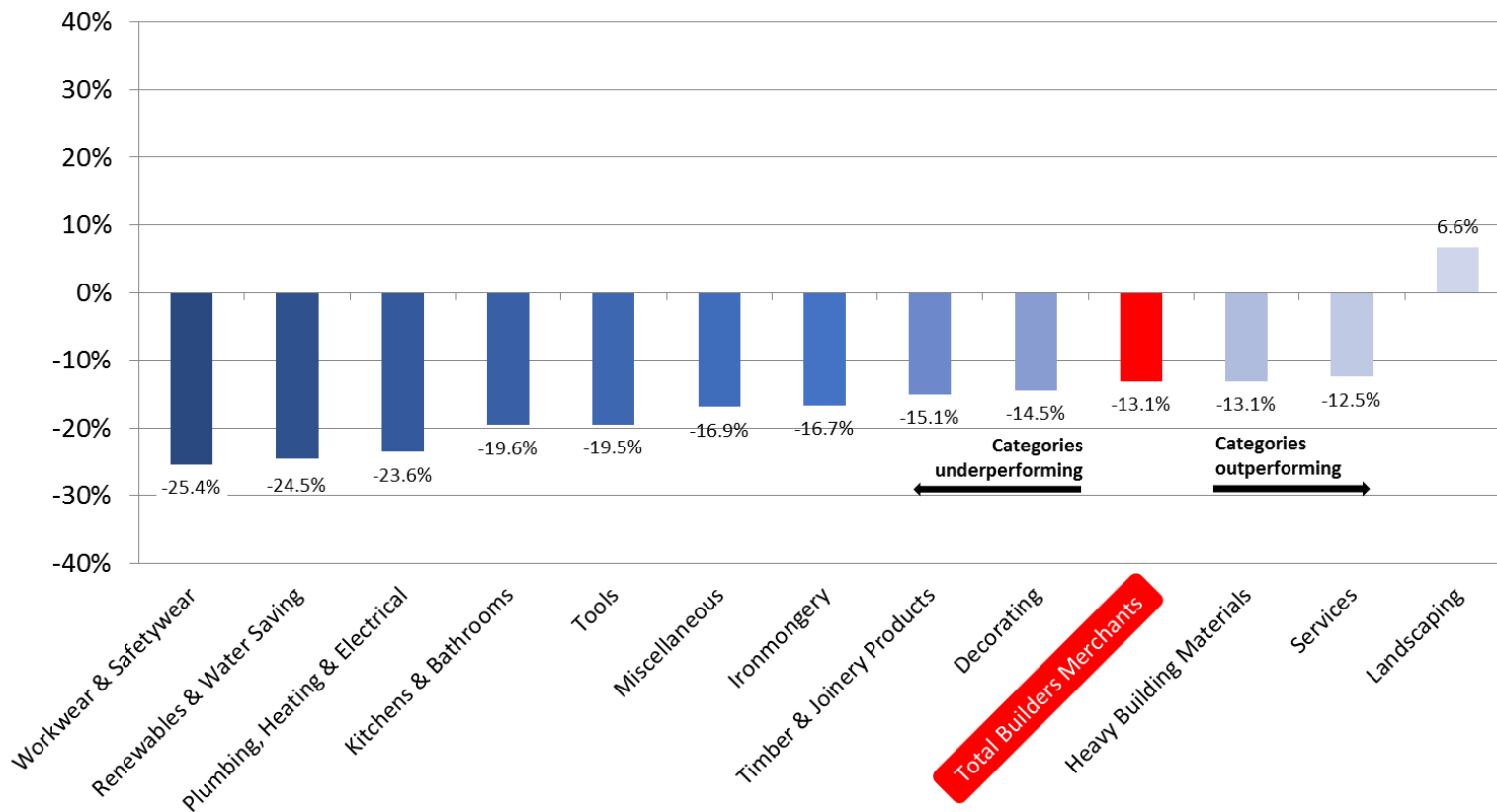


 Source: GfK's Builders Merchants Total Category Report July 2015 to April 2017

# Monthly: this month v last month

## April 2017 sales indices

### April 2017 index v March 2017 index



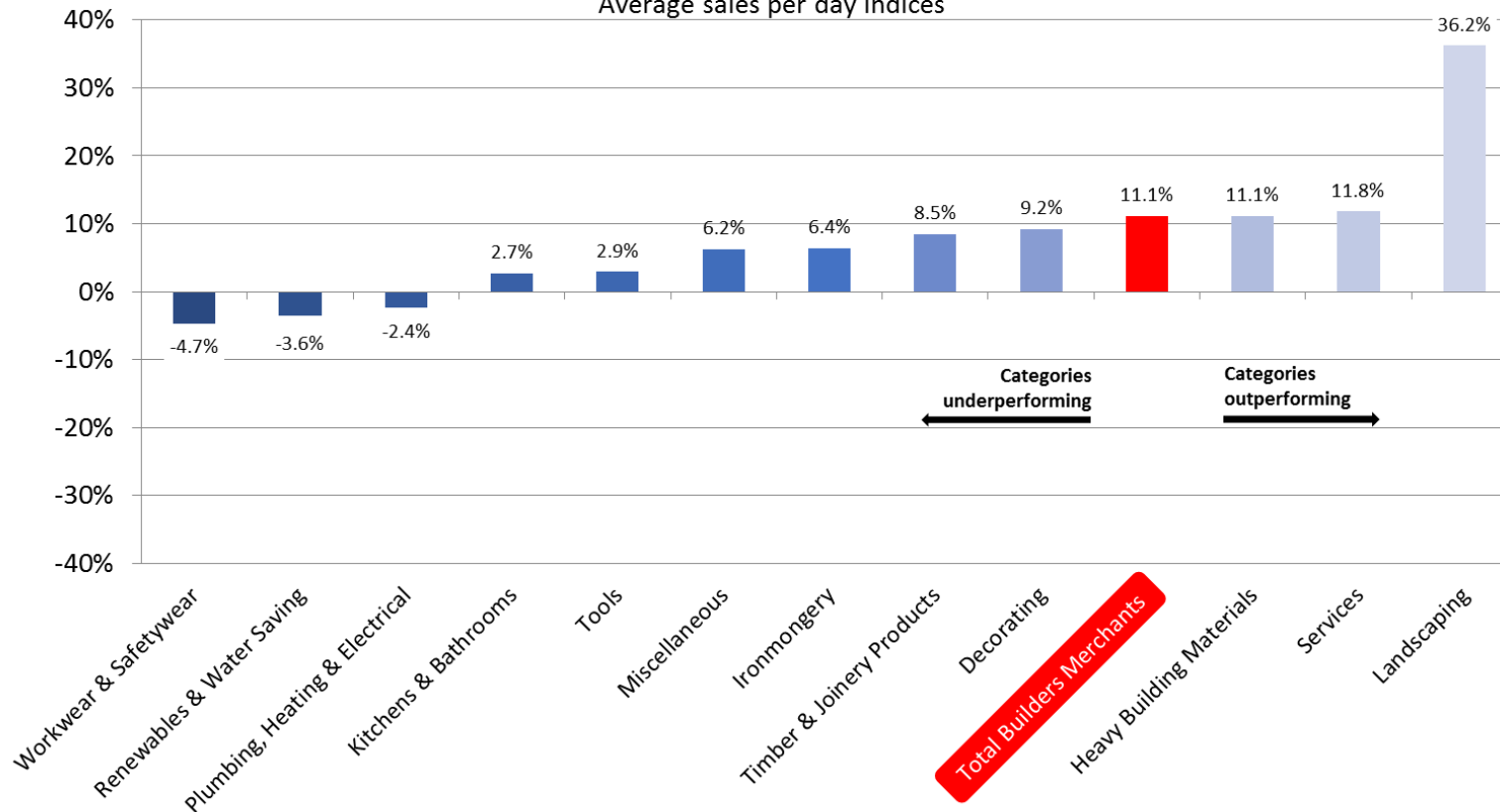
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly: this month v last month

## April 2017 average sales per day indices

### April 2017 index v March 2017 index

Average sales per day indices



 Source: GfK's Builders Merchants Total Category Report July 2015 to April 2017

# Quarterly: Index and Categories


## Quarter 1 2016\* to Quarter 1 2017

(Indexed on July 2014 to June 2015)



VALUE EX VAT £	Index	Q1, 2016	Q2, 2016	Q3, 2016	Q4, 2016	Q1, 2017
<b>Total Builders Merchants</b>	<b>100</b>	<b>99.8</b>	<b>113.6</b>	<b>112.9</b>	<b>100.9</b>	<b>106.0</b>
Timber & Joinery Products	100	100.0	109.0	111.1	100.7	107.1
Heavy Building Materials	100	99.3	114.1	113.6	101.4	105.7
Decorating	100	99.6	107.0	110.0	98.2	101.8
Tools	100	97.8	103.5	102.8	97.3	106.7
Workwear & Safetywear	100	108.2	100.1	99.4	105.5	108.8
Ironmongery	100	107.5	112.2	115.5	107.4	115.3
Landscaping	100	89.9	142.2	127.0	89.8	96.1
Plumbing, Heating & Electrical	100	112.0	105.2	105.3	113.9	119.9
Renewables & Water Saving	100	74.1	69.1	66.5	59.0	78.2
Kitchens & Bathrooms	100	103.7	104.1	106.1	104.7	110.6
Miscellaneous	100	108.1	111.3	115.1	109.4	115.5
Services	100	101.0	114.7	113.9	98.9	99.3

\*Click the web link below to see the complete series of quarterly indices from September 2015.

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2017

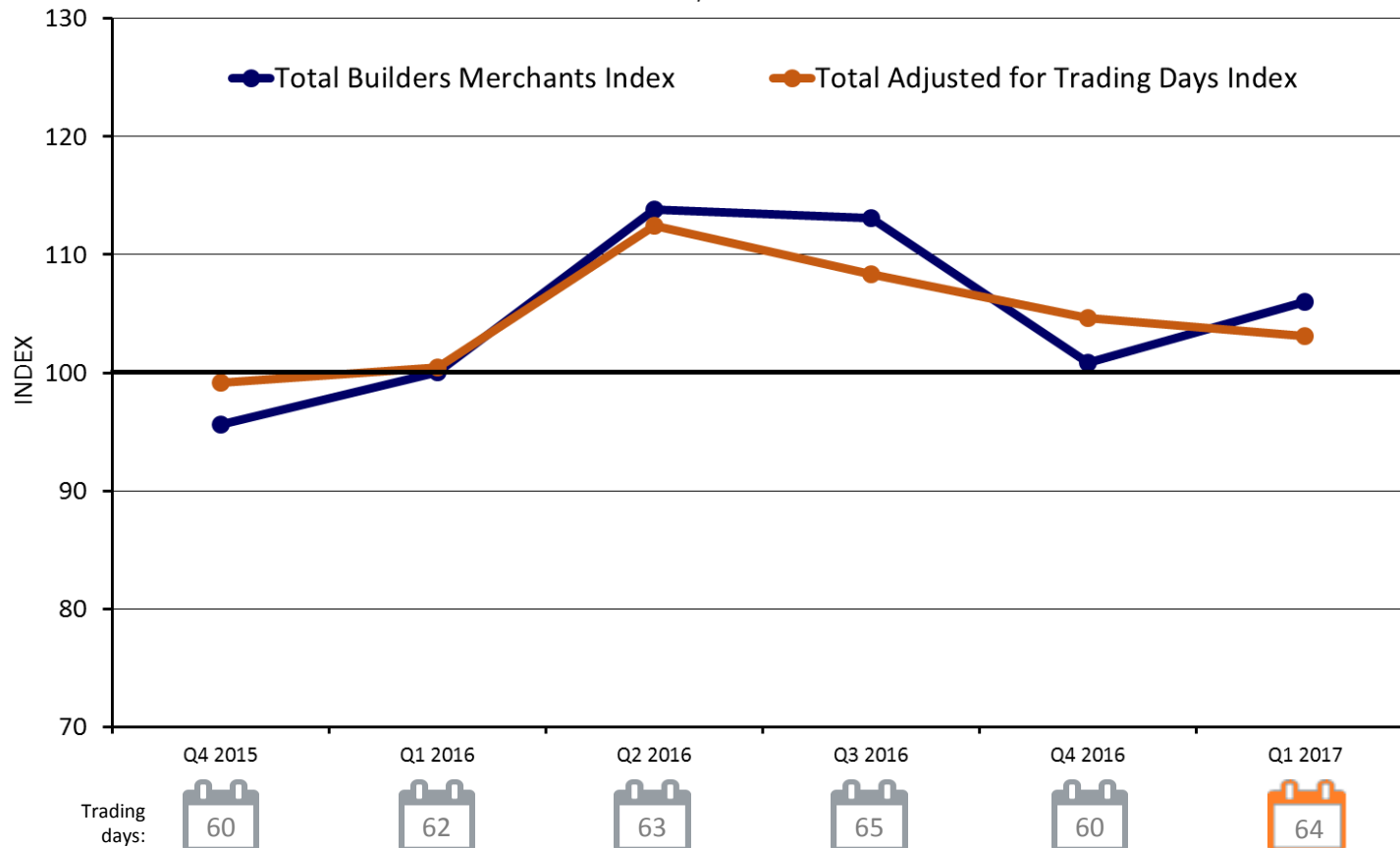


# Quarterly: Index

## Adjusted and unadjusted for trading days

### Total Builders Merchants Index v Total Adjusted for Trading Days Index

Indexed on July 2014 - June 2015



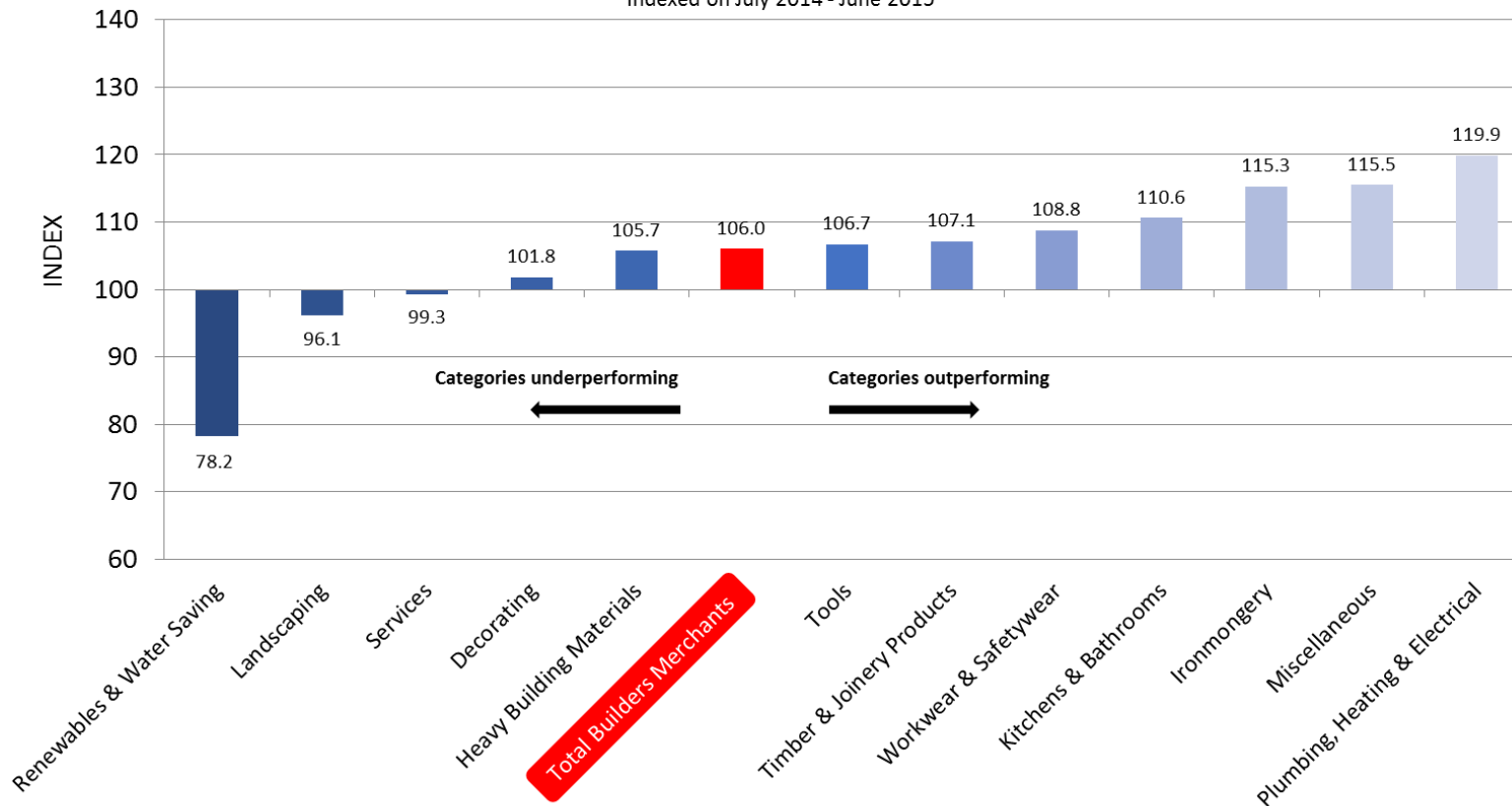
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2017

# Quarterly: Index and Categories

## Q1 2017 index

### Quarter 1 2017

Indexed on July 2014 - June 2015



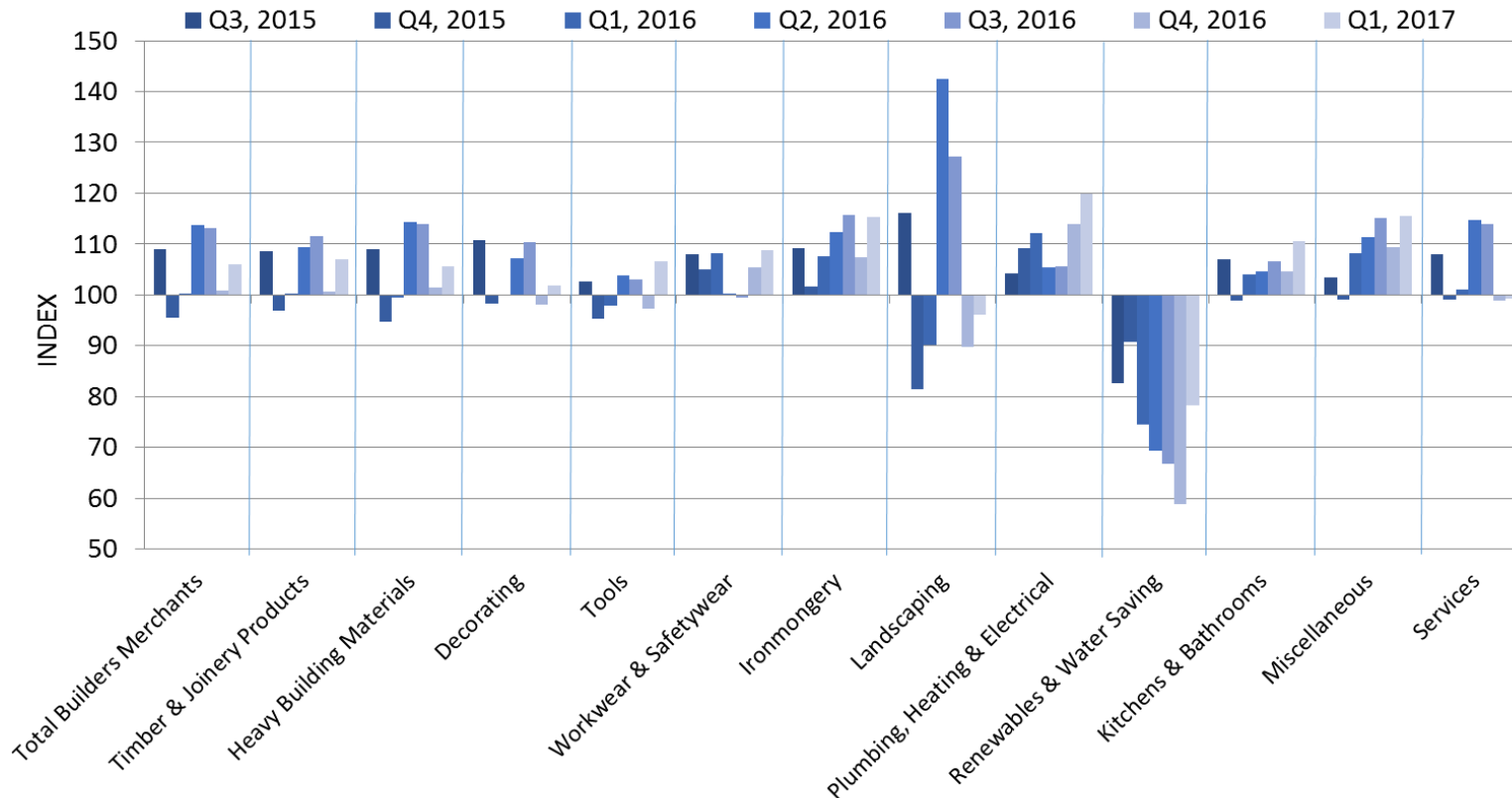
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2017

# Quarterly: Index and Categories

## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

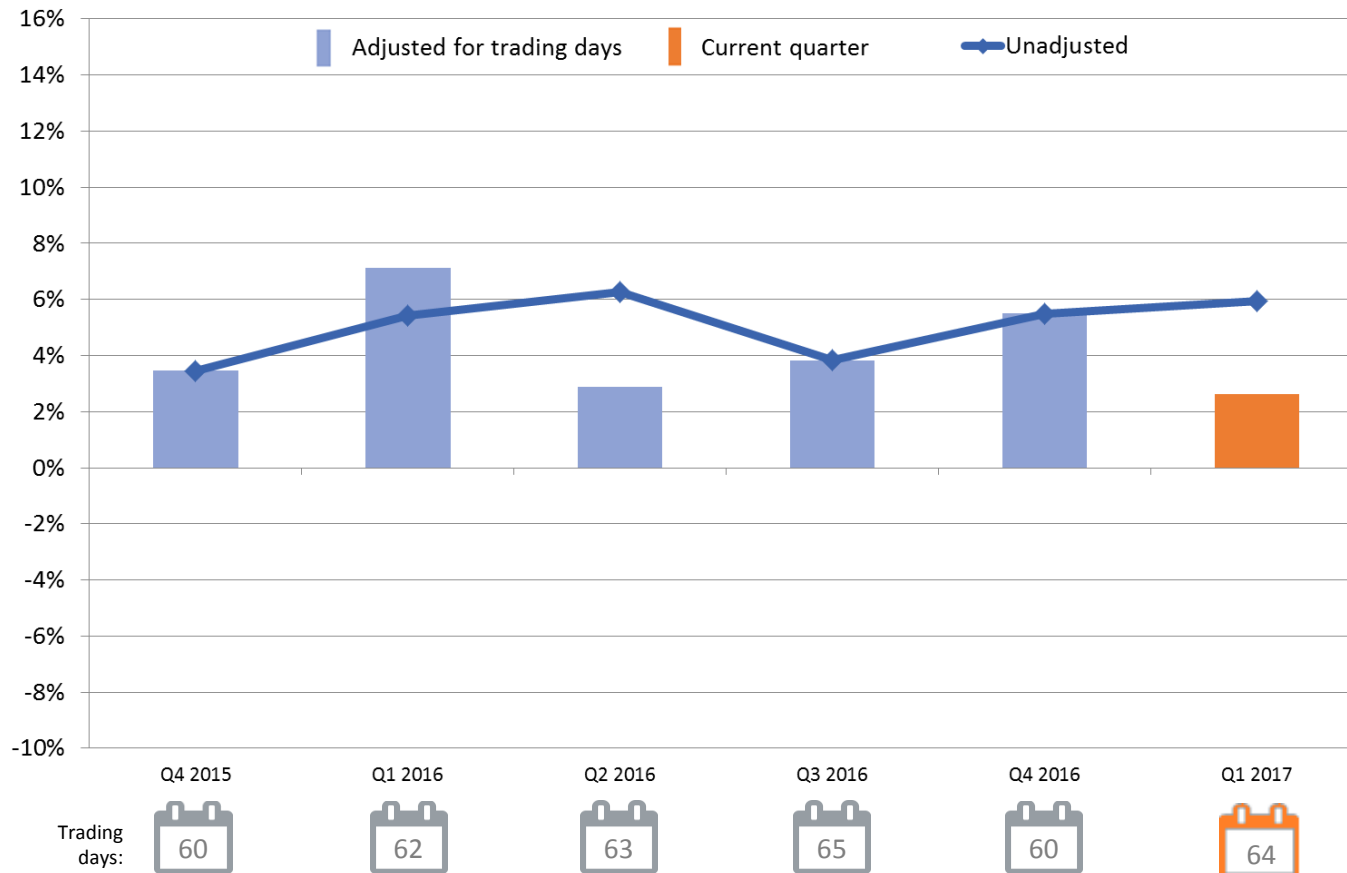


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2017

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

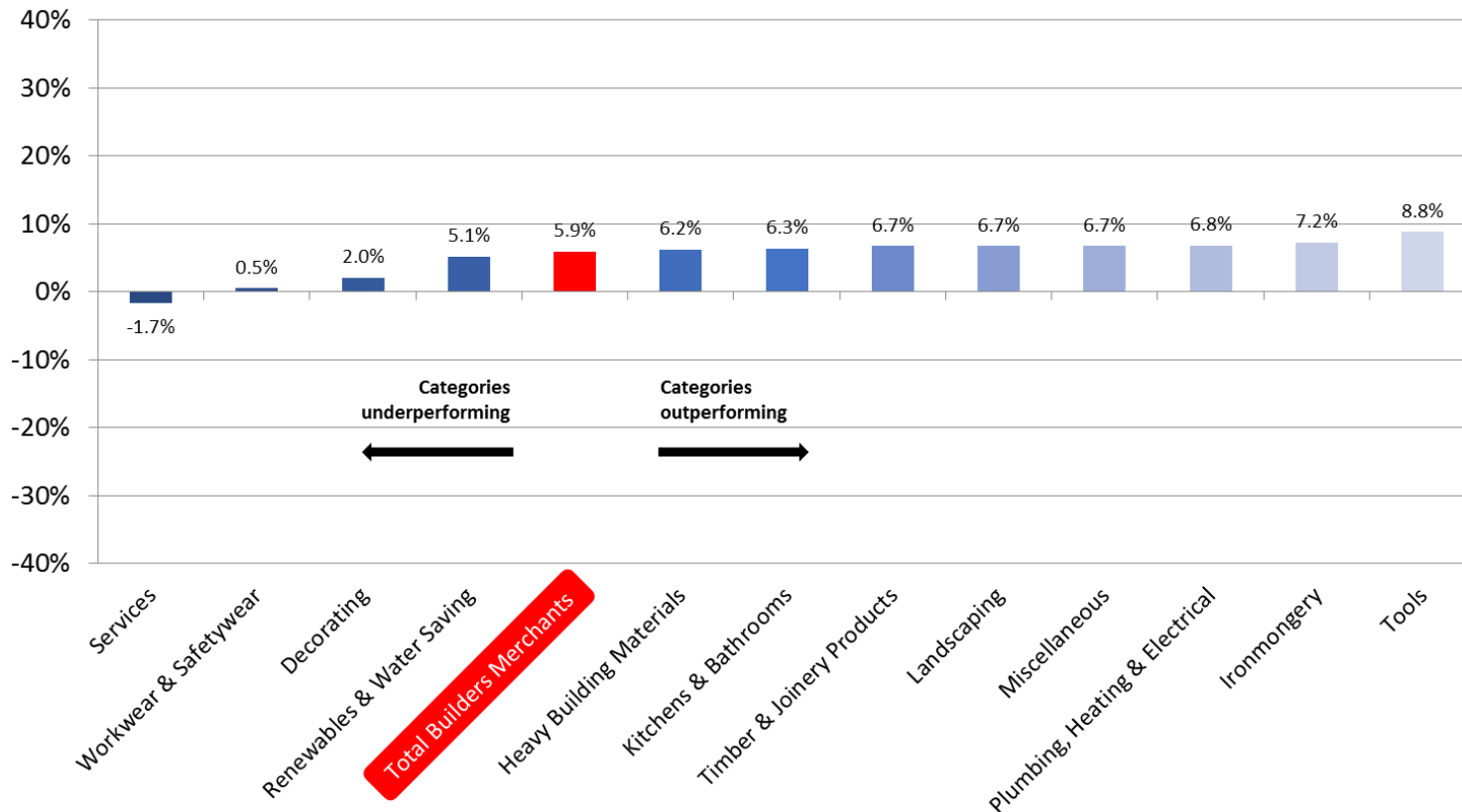


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2017

# Quarterly: This Year v Last Year

## Q1 2017 sales indices

### Quarter 1 2017 index v Quarter 1 2016 index



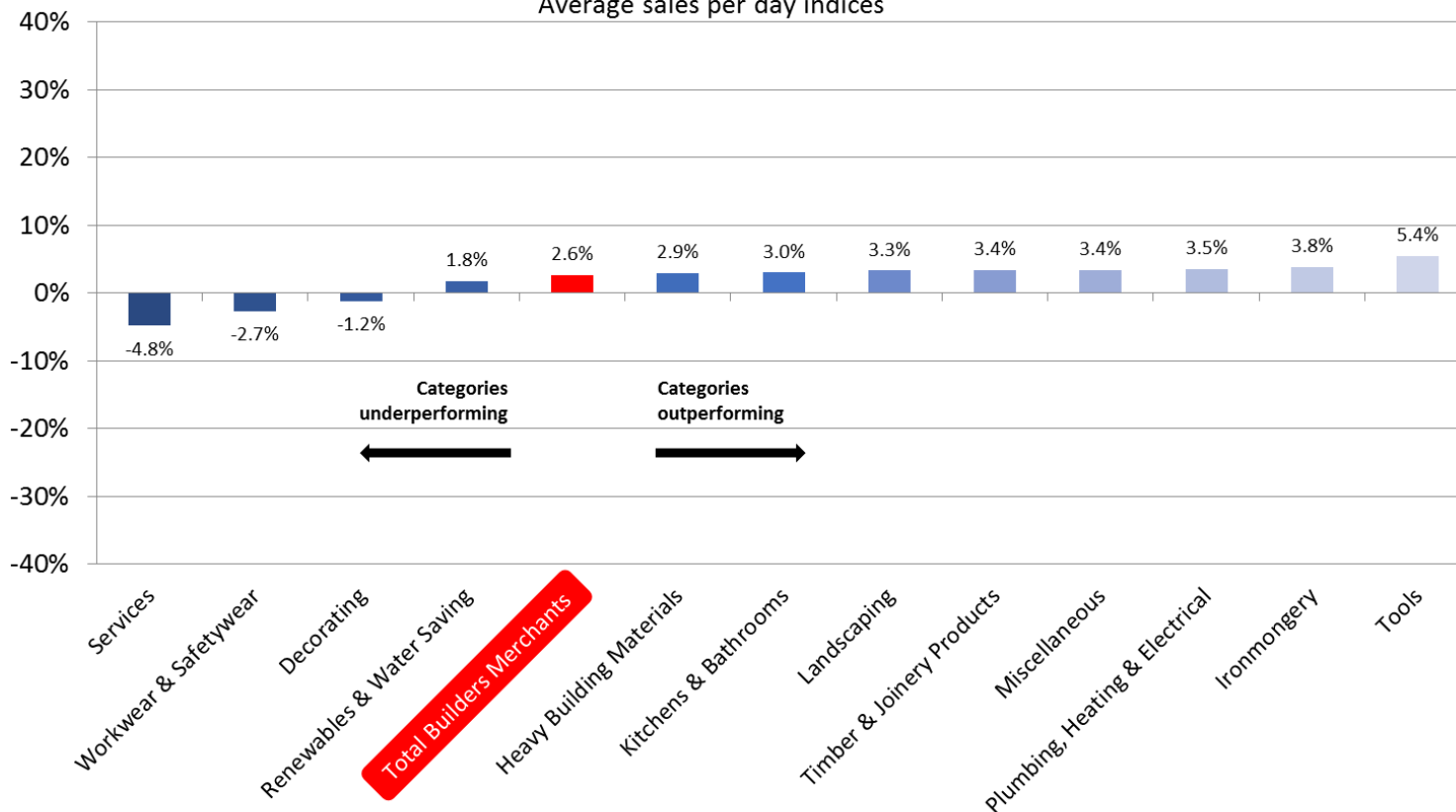
 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2017

# Quarterly: This Year v Last Year

## Q1 2017 average sales per day indices

### Quarter 1 2017 index v Quarter 1 2016 index

Average sales per day indices

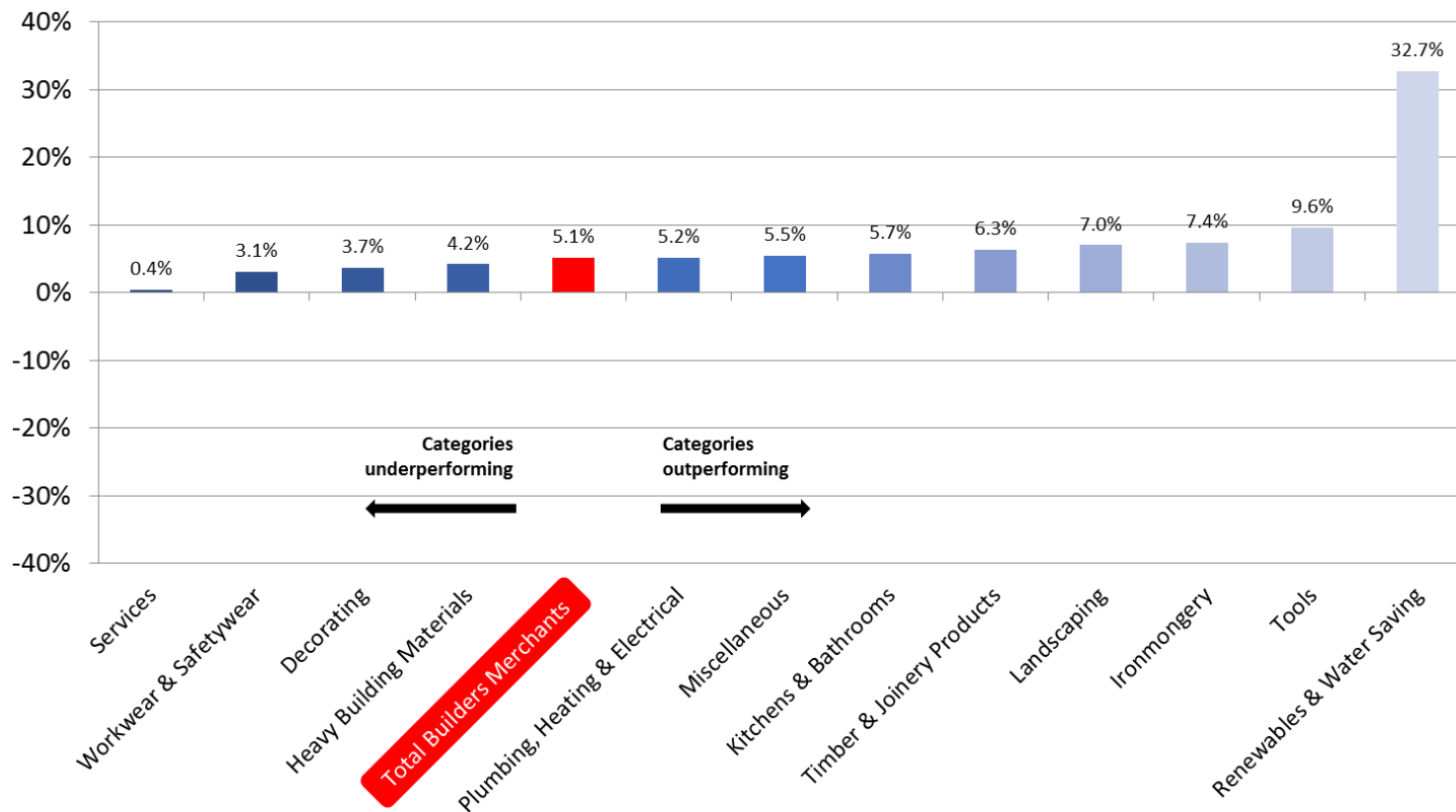


 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2017

# Quarterly: Quarter on Quarter

## Q1 2017 sales indices

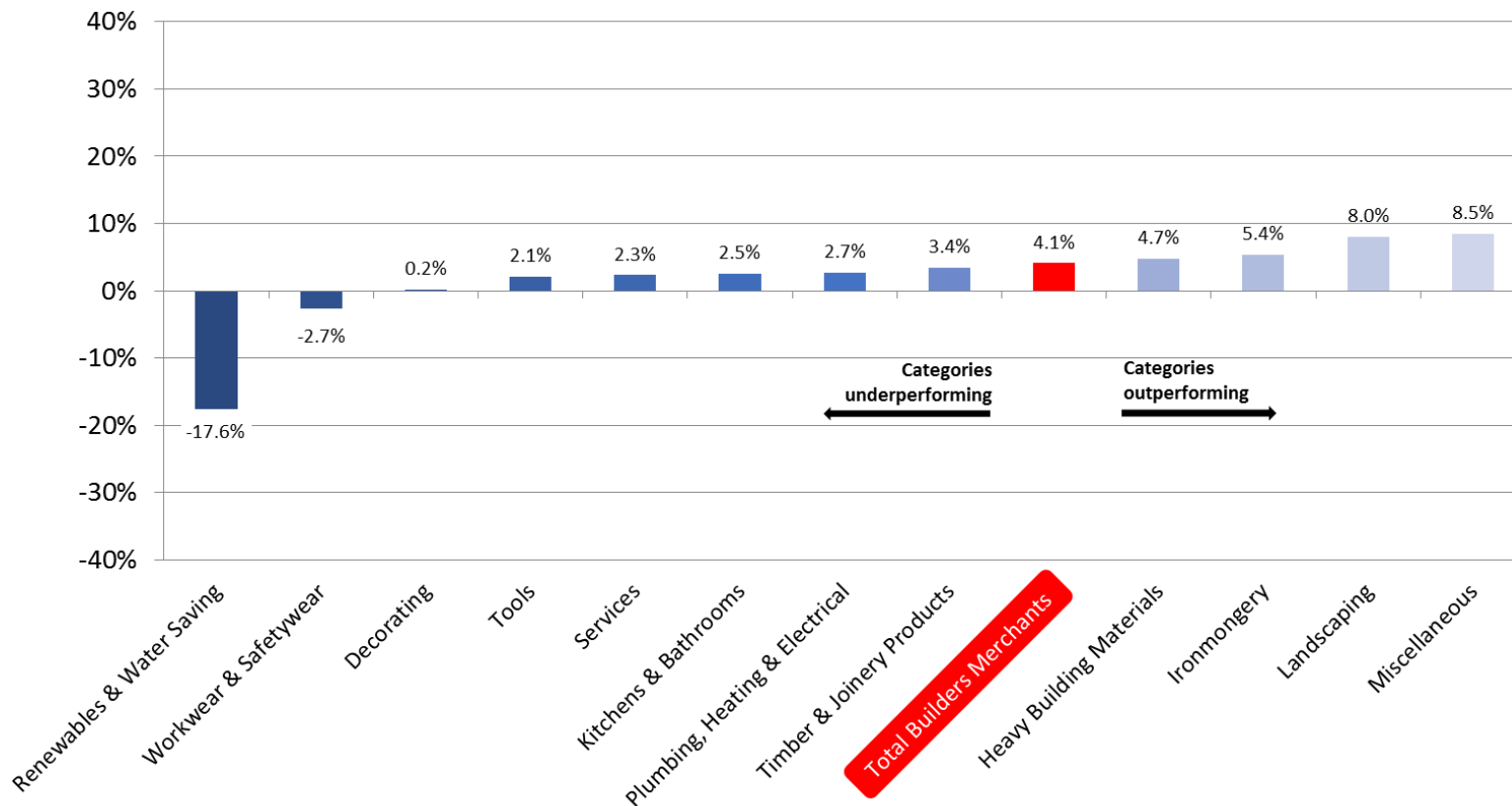
### Quarter 1 2017 index v Quarter 4 2016 index



 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2017

# Last 12 Months: Year on Year Rolling 12 months sales indices

## 12 months May 16 to Apr 17 v 12 months May 15 to Apr 16



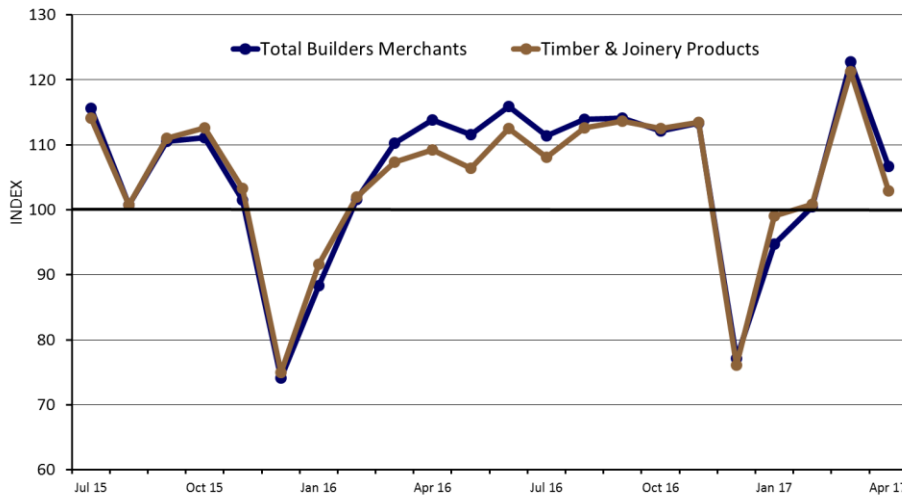
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017



# Monthly indices

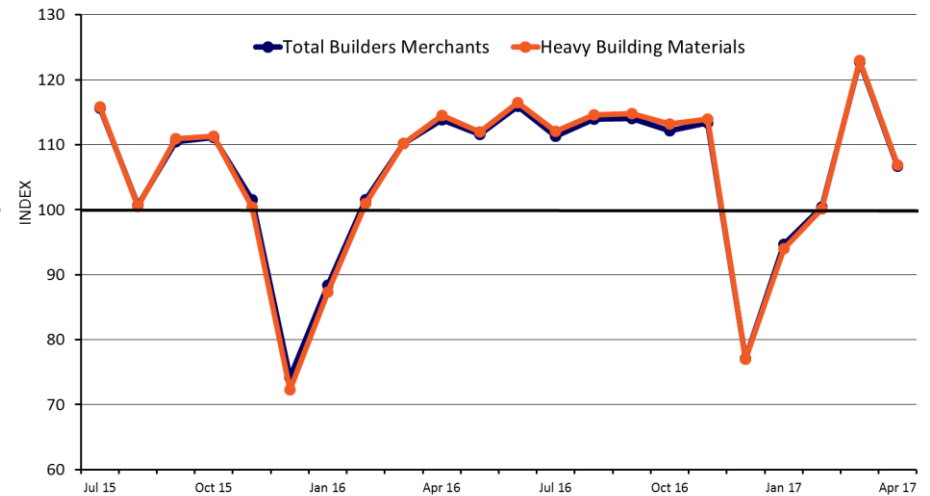
## April 2017

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



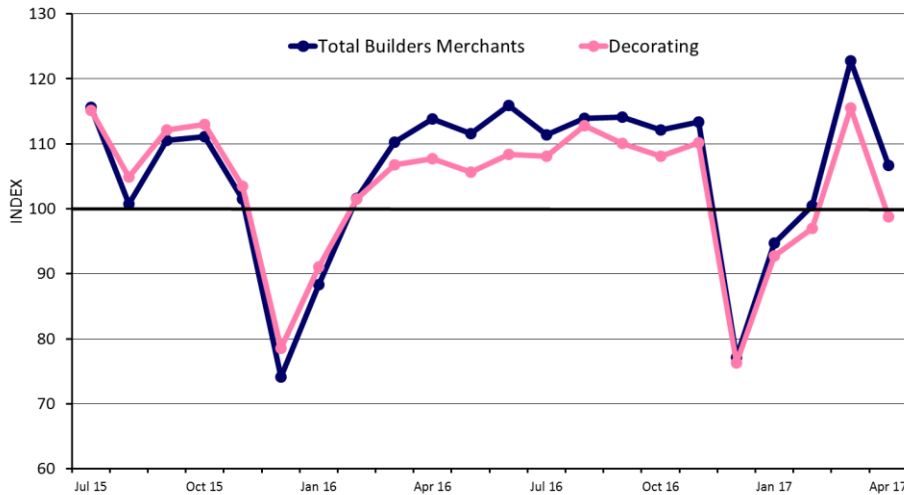
Indexed on July 2014 – June 2015

**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly indices

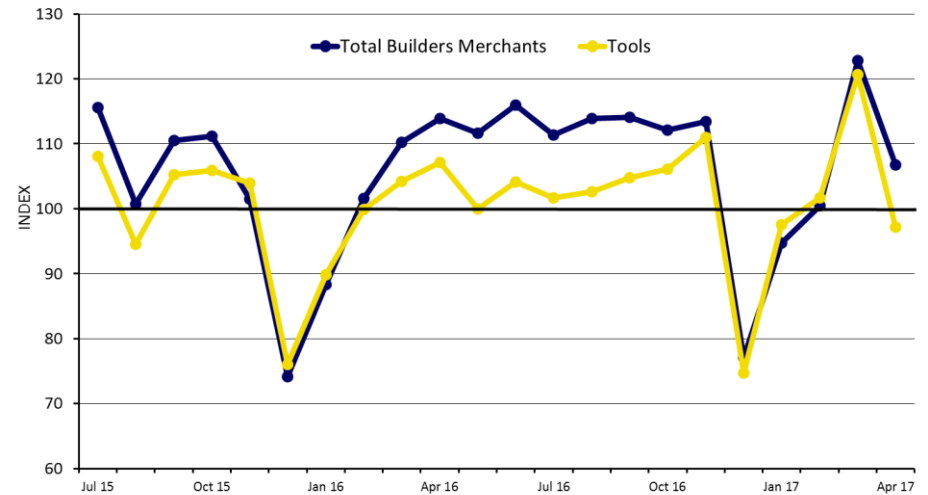
## April 2017

### Decorating



Indexed on July 2014 – June 2015

### Tools



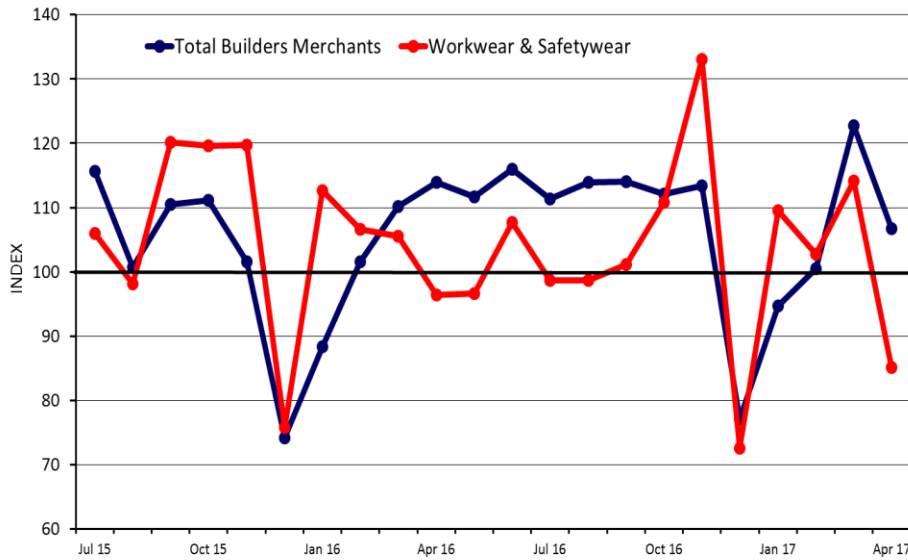
Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly indices

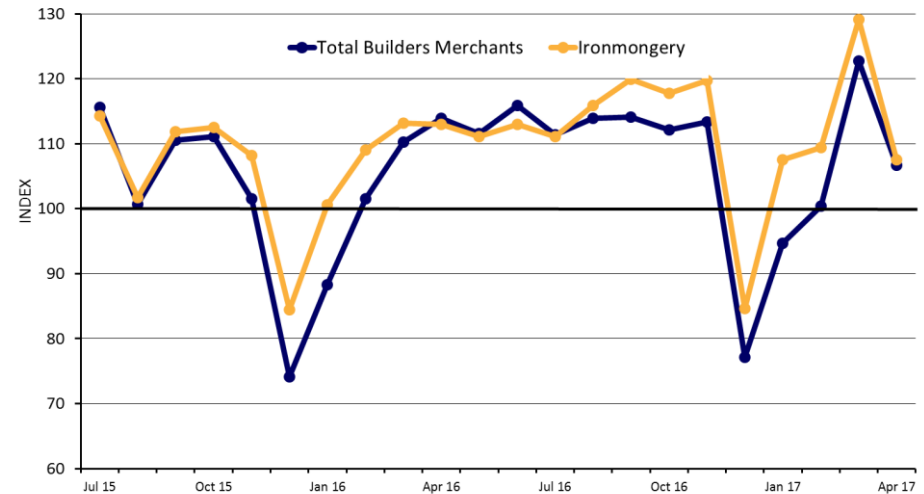
## April 2017

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



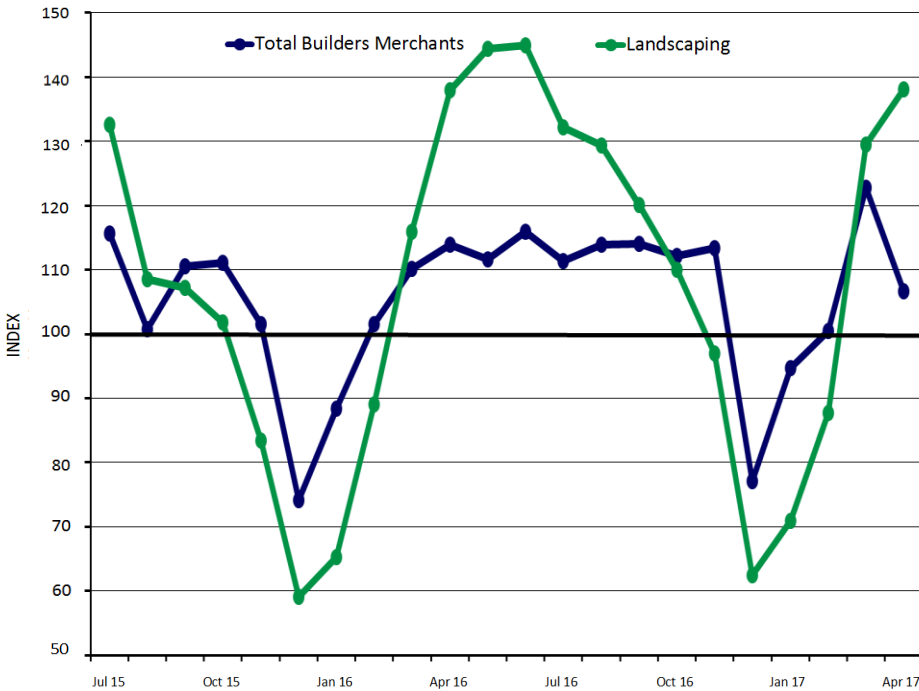
Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly indices

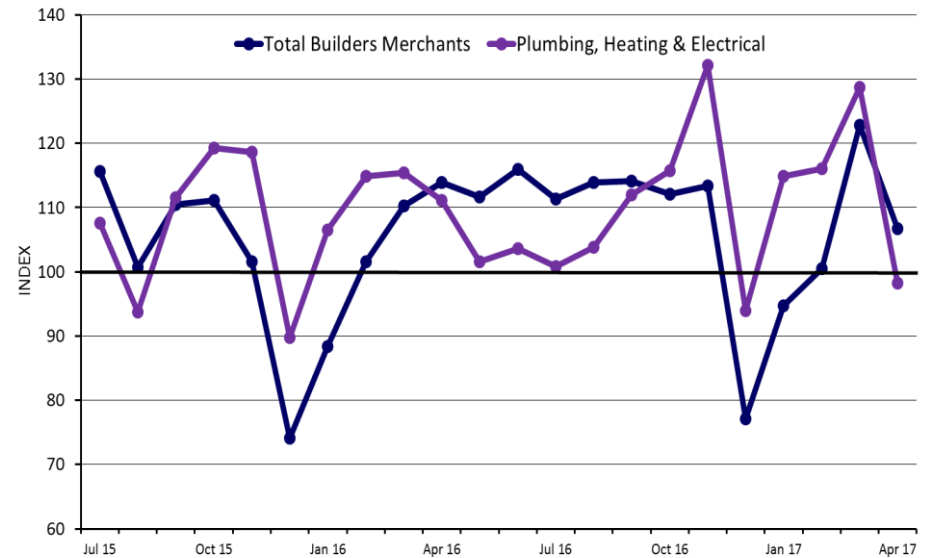
## April 2017

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical



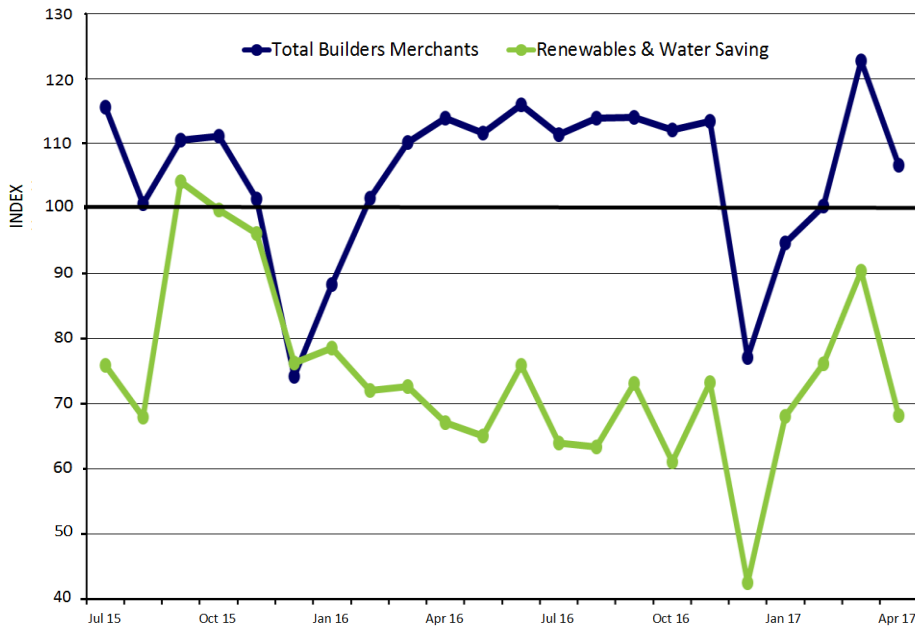
Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly indices

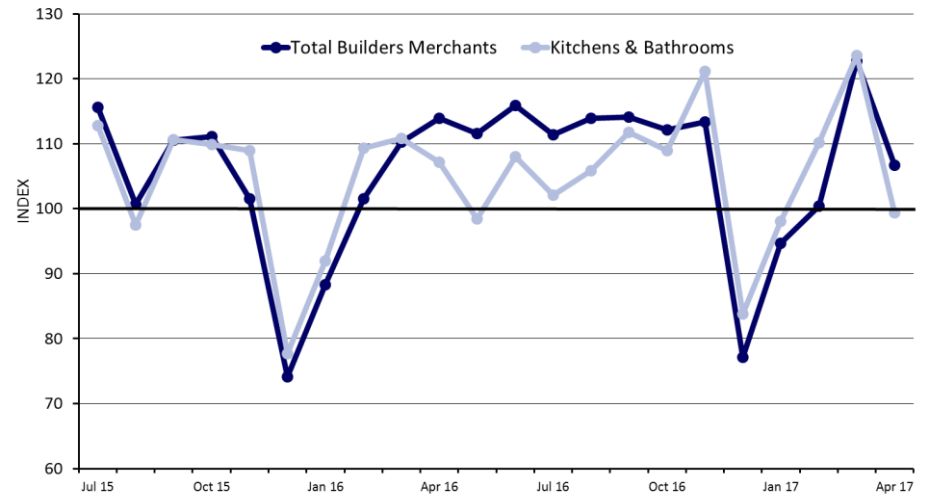
## April 2017

### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms



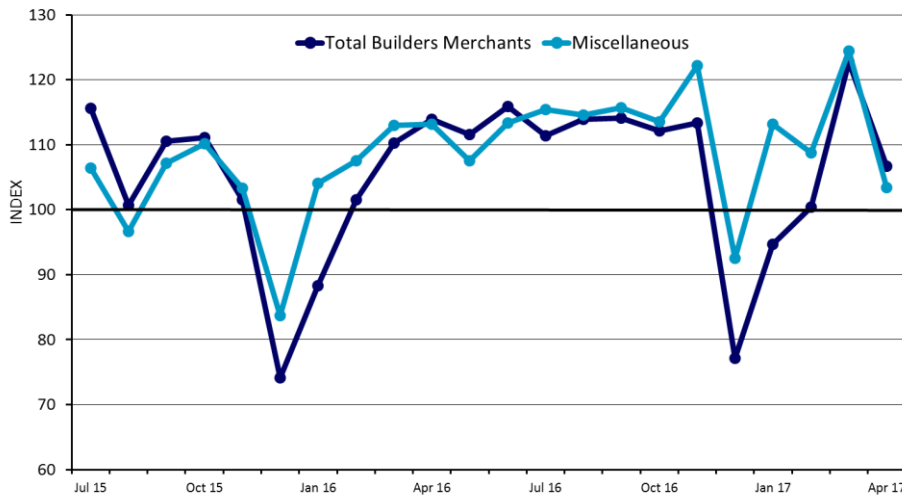
Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to April 2017

# Monthly indices

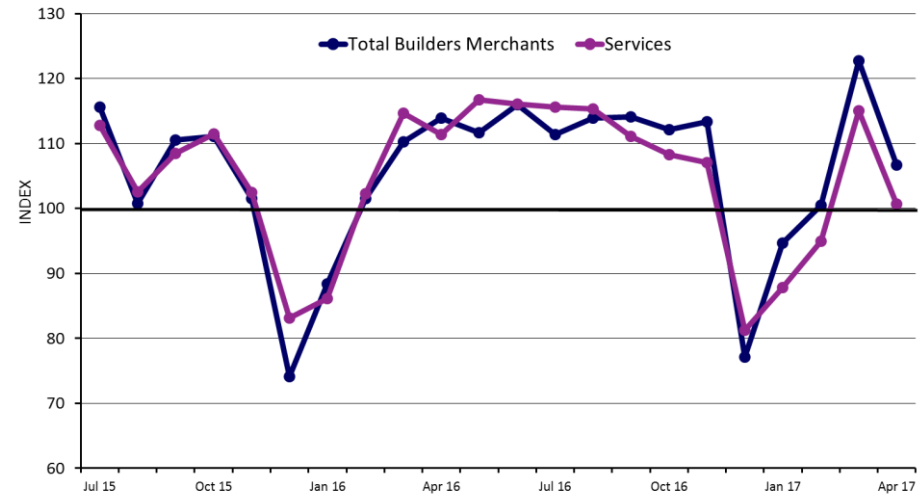
## April 2017

### Miscellaneous



Indexed on July 2014 – June 2015

### Services



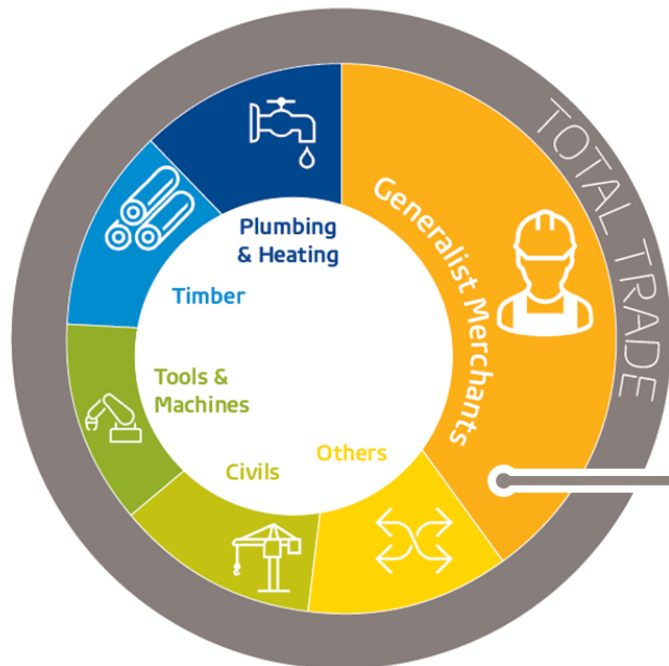
Indexed on July 2014 – June 2015

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

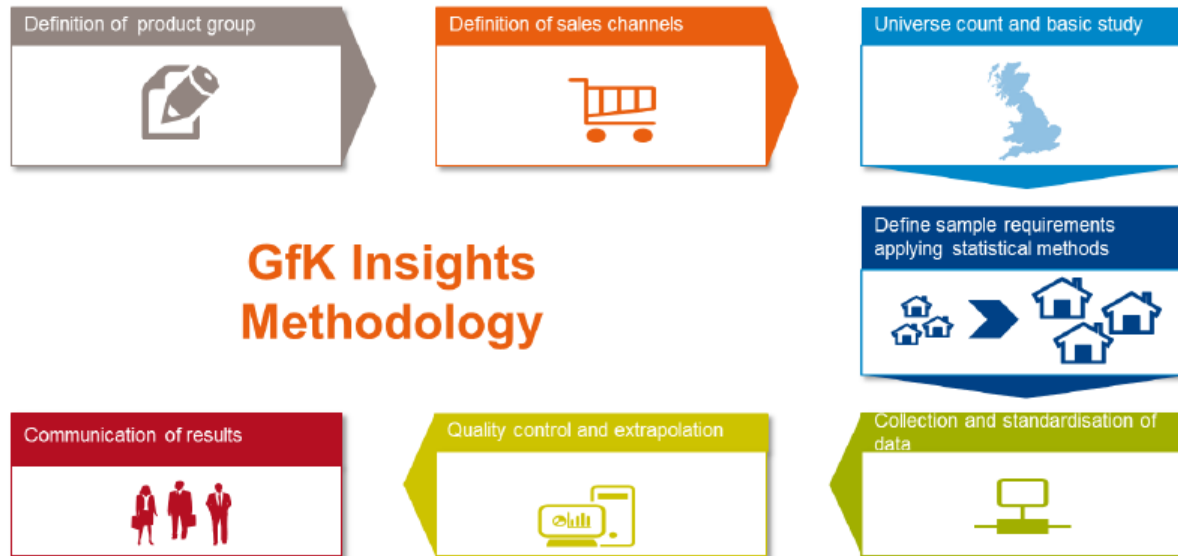
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

Multiple merchants are those defined as having more than 3 outlets or a turnover of greater than £3m p.a.

Examples include:



# GfK Insights Methodology



GfK collect live sales-out data from our panel of merchant partners.

We add value to that data through the application of each sold product's unique technical features. We compare like-for-like products and categories from like-for-like merchants and aggregate this within our reports.

Our international methodology is based on robust scientific principles and delivers continuous, reliable information that can be applied to your business requirements.



# GfK's Product Categories

Reports cover category headline values & in-depth, brand-level insights



## Headline values available

### Timber & Joinery Products

Timber  
Sheet Materials  
Cladding  
Flooring & Flooring Accessories  
Mouldings  
Stairs & Stairparts  
Window & Frames  
Doors/Door Frames

### Heavy Building Materials

Bricks Blocks & Damp Proofing  
Drainage/Civils/Guttering  
Lintels  
Cement/Aggregate/Cement Accs  
Concrete Mix/Products  
Plasters Plasterboards And Accessories  
Roofing Products  
Insulation  
Cement Mixers/Mixing Buckets Products  
Builders Metalwork  
Other Heavy Building Equipment/Material

### Decorating

Paint/Woodcare  
Paint Brushes Rollers & Pads  
Adhesives/Sealants/Fillers  
Tiles And Tiling Accessories  
Decoration Preparation & Decorating Sundries  
Wall Coverings

### Tools

Hand Tools  
Power Tools  
Power Tool Accessories  
Ladders & Access Equipment

### Workwear And Safetywear

Clothing  
Safety Equipment

### Ironmongery

Fixings And Fastenings  
Security  
Other Ironmongery

### Landscaping

Garden Walling/Paving  
Driveways/Block Paving/Kerbs  
Decorative Aggregates  
Fencing And Gates  
Decking  
Other Gardening Equipment

### Plumbing Heating & Electrical

Plumbing Equipment  
Boilers Tanks & Accessories  
Heating Equipment/Water Heaters/Temperature Control/Air Treatment  
Radiators And Accessories  
Electrical Equipment  
Lighting And Light Bulbs

### Renewables And Water Management

Water Saving  
Renewables & Ventilation

### Kitchens & Bathrooms

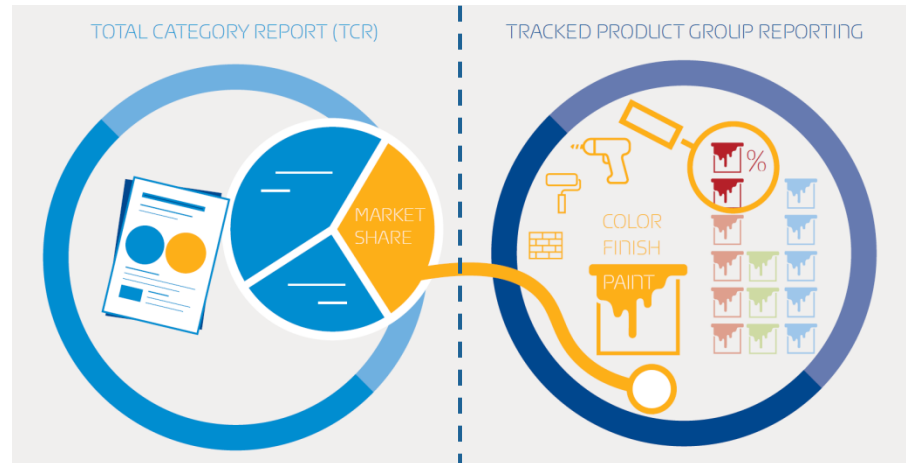
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

Cleaning/Domestic/Personal  
Automotive  
Glass  
Other Furniture & Shelving  
Other Misc

### Services

Toolhire / Hire Services  
Other Services



## In-depth product group reporting

Monthly sales values, volumes, pricing analysis & distribution facts available by brand and key product features.

For insights on your product group please contact Pete Church at GfK ([pete.church@gfk.com](mailto:pete.church@gfk.com)).

### Available categories:

#### Heavyside

Bricks  
Insulation

#### Lightside

Emulsion Paints (incl. Masonry & Base)  
Trim Paints  
Primers/Undercoats  
Woodcare  
Adhesives  
Sealants  
Fillers/PU Foam  
Tile Fixing (Adhesives/Grout)

# Contact Us

## For further information



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