

“one **industry**  
one **voice**”

# Builders Merchant Building Index



Q3 2015

# Building the Industry & Building Brands from Knowledge

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# Introduction

**John Newcomb, Managing Director BMF**



The Builders Merchant Building Index (BMFI) report uses 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 Merchants Panel started collecting data in July 2014, and all monthly trend data in the BMFI is indexed on this month. Quarterly data is indexed on Q3 2014. 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 our industry access to far more accurate and comprehensive data than that available to other construction sectors.

Instead of looking to Government, the ONS, the CPA or individual surveys to find out what is happening in the market, data from the Builders Merchants Panel is setting a new standard to give us a thoroughly reliable market picture which can also inform the wider construction industry. Unlike data from other sources, which tends to be based on estimates, or sales from suppliers into the supply chain, this up-to-date data is based on actual sales out from merchants to builders and other trades.

Measuring the level of RMI work in the economy is hugely important to everyone including Government. Yet until now there has not been any decent measure of RMI, or even an approximation of it. For want of one, some economists have turned to their own informal measures – such as counting skips in the road where they live. The Builders Merchants Panel provides an accurate alternative on a national scale.

We recognise the importance of sharing this data. In this spirit, MRA Marketing proposed creating the Builders Merchant Building Index to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands. The first two Expert Brands within the Heavy Building Materials category, IKO plc speaking for Roofing, and Alumasc Water Management Solutions, speaking for Civils, Metal Rainwater & Drainage are included in this report. Mike Rigby and his team at MRA Marketing will produce the Builders Merchant Building Index and will contact you to explain how this will work and outline the opportunities it brings.

GfK insights go deeper than the category sectors contained in this document. They can trace product group performance and track features that are relevant to you. GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join in 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 getting involved should contact Ricky Coombes at [Ricky.Coombes@gfk.com](mailto:Ricky.Coombes@gfk.com)

# Overall Index and Categories

**Monthly** (Indexed on July 2014)

VALUE EX VAT £	Jul 14	Aug 14	Sep 14	Oct 14	Nov 14	Dec 14	Jan 15	Feb 15	Mar 15	Apr 15	May 15	Jun 15	Jul 15	Aug 15	Sep 15
<b>Total Builders Merchants</b>	<b>100</b>	<b>87.8</b>	<b>97.6</b>	<b>97.7</b>	<b>86.4</b>	<b>65.7</b>	<b>77.4</b>	<b>81.4</b>	<b>96.8</b>	<b>95.2</b>	<b>91.1</b>	<b>102.1</b>	<b>103.8</b>	<b>90.4</b>	<b>99.2</b>
Timber, Sheet & Joinery Products	100	89.9	100	100.2	89.6	66.3	81.9	83.7	97.4	93.3	90.9	100.5	103.7	91.5	100.8
Heavy Building Materials	100	87.1	98	96.9	84.3	63.8	75.3	80.3	96.2	94.7	89.3	101.8	102.8	89.2	98.5
Decorating & Renovation	100	89.6	99.5	98.6	90.1	69.4	81.6	82.2	95.6	90.8	87.8	99.9	104.4	95	101.7
Tools	100	90.8	104.9	108.1	102.6	73.2	84.9	83.7	94.7	93.6	90.1	98.5	101.2	88.5	98.6
Workwear & Safetywear	100	91	102.8	121.8	118.5	77.2	101.8	94.9	95.4	87.3	97.7	105.9	105.5	97.6	119.6
Ironmongery	100	88.4	98.3	98.5	90	71.4	86.7	85.6	97	95.8	90.1	101.1	104.9	93.3	102.7
Landscaping	100	81.7	85	74.4	61.1	44.9	50.4	58.6	85.4	105.3	101.1	109.5	105.6	86.5	85.4
Plumbing, Heating & Electrical	100	90.7	106.1	119.4	111.8	91.2	106.8	106.8	114.9	103.3	98.8	109	112.6	98.2	116.9
Renewables & Water Management	100	85.6	103.7	110.8	79.8	115.5	88.6	86.6	120.3	97.1	79.1	102	73.7	66	101.3
Kitchens & Bathrooms	100	87.7	97.3	100	96.9	72.7	83.4	92.2	101.1	89.6	89.6	98.5	103.8	89.7	101.9
Miscellaneous	100	92.3	110.9	109.9	100.2	78.7	94.1	87.5	96	91	85.5	100.1	101.6	92.3	102.4
Services	100	91	89.5	107.4	92.8	79.1	80.5	87.7	104.4	92.5	91.9	99.6	104.9	95.3	100.9

# Overall Index and Categories

**Quarterly** (Indexed on Q3, 2014)

VALUE EX VAT £	Q3, 2014	Q4, 2014	Q1, 2015	Q2, 2015	Q3, 2015
<b>Total Builders Merchants</b>	<b>100</b>	<b>87.5</b>	<b>89.6</b>	<b>101.1</b>	<b>102.8</b>
Timber, Sheet & Joinery Products	100	88.4	90.7	98.2	102.1
Heavy Building Materials	100	85.9	88.3	100.3	101.9
Decorating & Renovation	100	89.3	89.7	96.4	104.1
Tools	100	96.1	89.1	95.4	97.5
Workwear & Safetywear	100	107.9	99.2	98.9	109.6
Ironmongery	100	90.6	93.9	100.1	104.9
Landscaping	100	67.6	72.9	118.4	104.0
Plumbing, Heating & Electrical	100	108.6	110.7	104.8	110.4
Renewables & Water Management	100	105.7	102.1	96.1	83.3
Kitchens & Bathrooms	100	94.6	97.1	97.4	103.7
Miscellaneous	100	95.3	91.5	91.2	97.7
Services	100	99.6	97.2	101.3	107.4

When comparing quarterly with monthly indices, note that the index for a quarter can be quite different from the indices for its three constituent months. In Landscaping above, the index for Q215, 118.4, looks stronger than the monthly indices suggest for April, May and June (105.3, 101.1 and 109.5). Individual months are indexed on July 2014, which was a relatively strong month in landscaping.

# Overview

## John Newcomb, Managing Director BMF



The Index has reached another Milestone moment. The figures for Q3 2015 give us the first quarterly year on year comparisons, with Total Builders Merchant sales up 2.8% compared to the same quarter last year. It was the best quarter since GfK started tracking in July 2014.

Total Q3 sales were up 1.7% compared to Q2 2015.

Some of the smaller sectors performed very strongly in Q3 2015 compared to the same quarter last year. Plumbing, Heating & Electrical (up 10.4%), Workwear & Safetywear (9.6%) and Services (7.4%) were particularly strong.

Renewables & Water Management have suffered since the Government announced that Zero Carbon Standard for new homes would be discontinued. It saw the biggest drop compared to the same quarter last year (-16.7%). Tools is the next worst performer with a drop of -2.5% on Q3 2014.

With four fewer trading days in Q2 than Q3 2015, there was an overall drop of -4.6% in Q3 on the previous quarter's average daily sales value. Q3 2014 had the same number of trading days so there is no adjustment to make compared to the year before.

Looking at monthly trends, Total Builders' Merchants sales in September were up 9.7% on August 2015, and 1.7% up on September 2015. See page 4.

Again, Renewables & Water Management was the most volatile, with a 54% pickup compared to August, the previous month. Workwear & Safetywear was 23% up. Smaller categories like these are more volatile than large categories such as Heavy Building Materials and Timber & Joinery which together make up two thirds of the generalists builders' merchant market.

When adjusted for trading days September sales were marginally down (-0.2%) compared to August 2015.

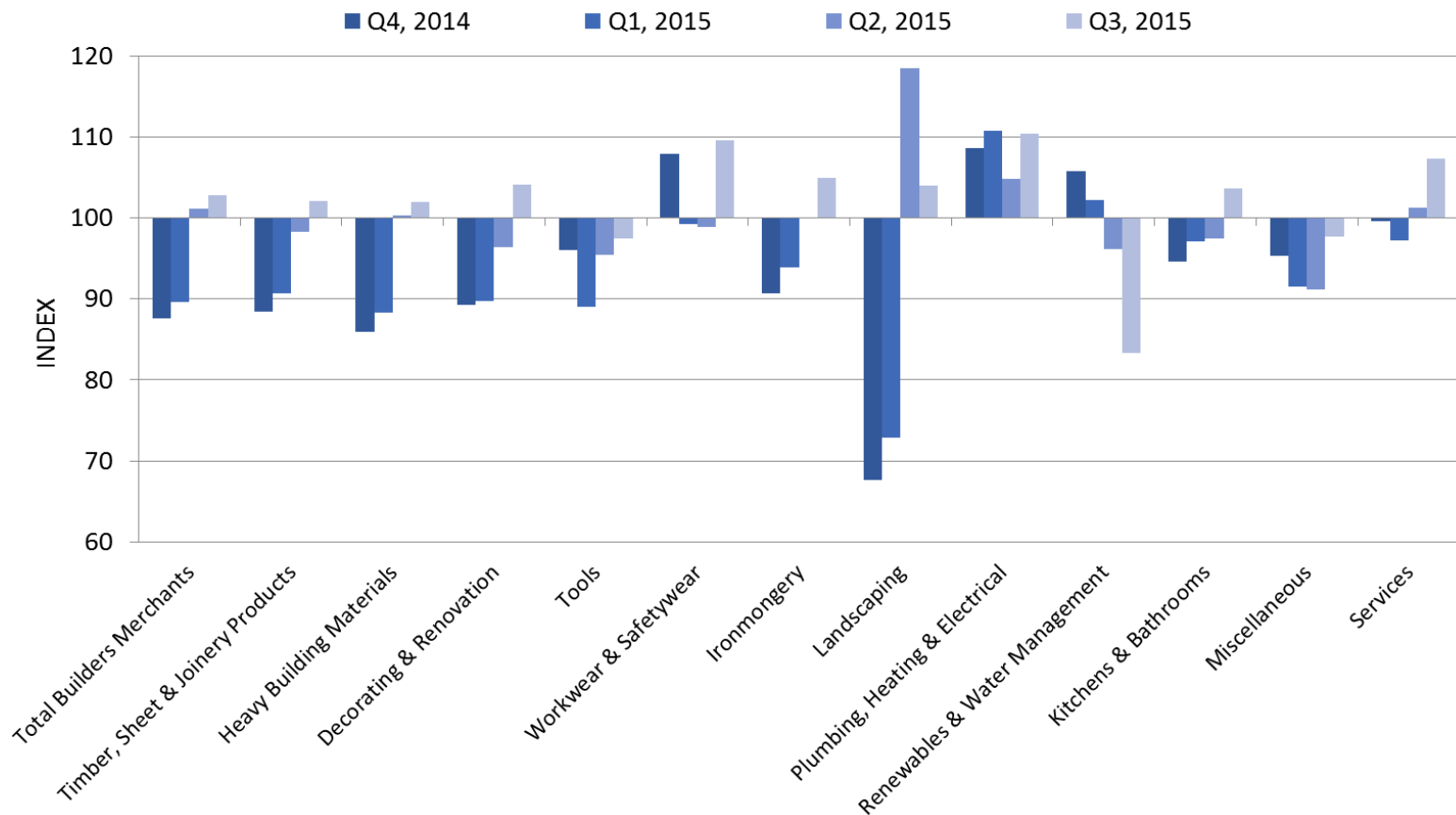
The future looks bright for Builders' Merchants, says GfK in a summary on page 34. Although business confidence is falling, consumer confidence is at its highest since 2000. Homeowners have a greater intention to build and improve their homes, and property transactions have returned to pre-recession levels. In his Autumn Statement, the Chancellor also announced the "biggest housebuilding programme since the 1970s". Good times, if it all goes to plan!

# Quarterly Report

Q3 2015



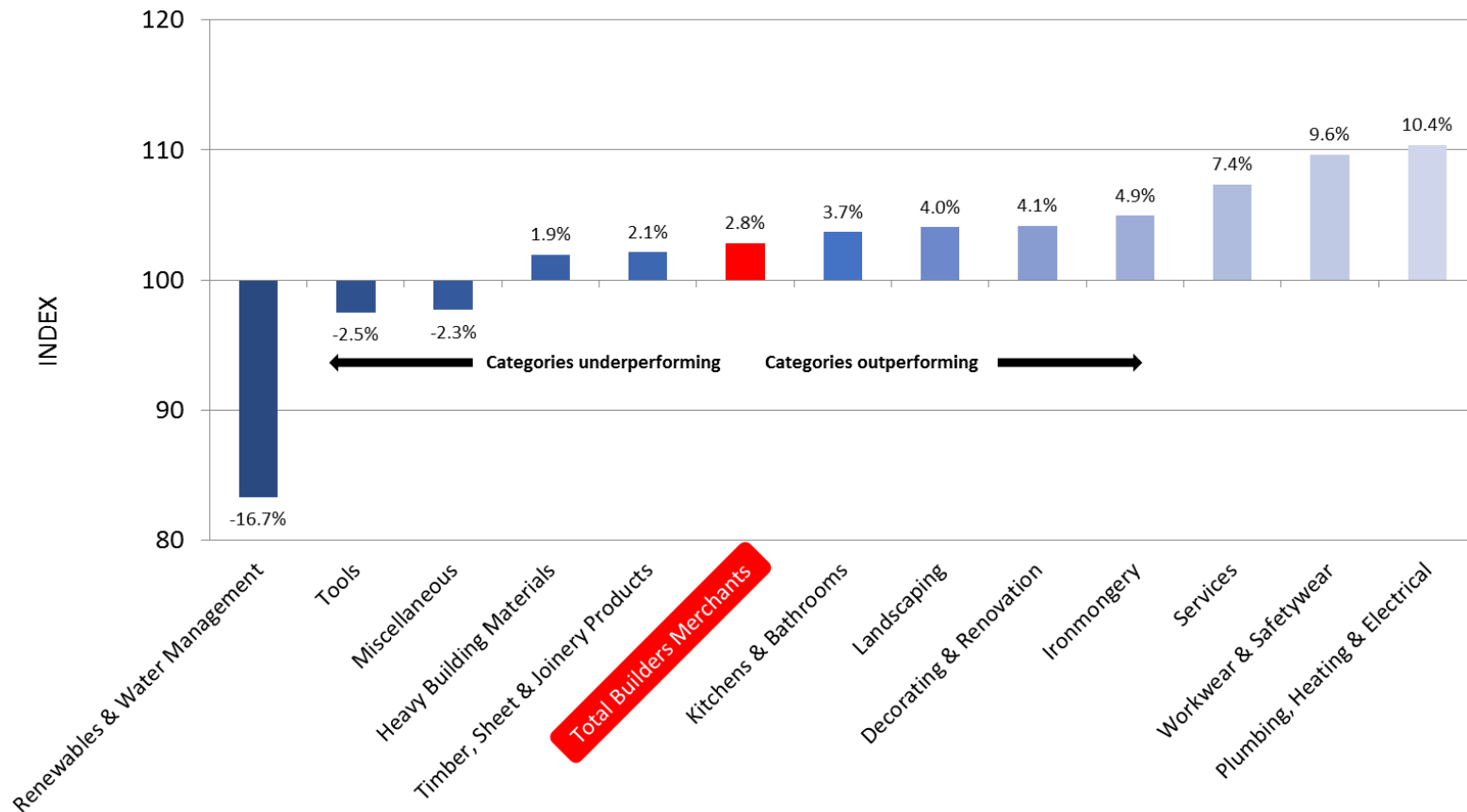
## Quarterly Index (Q3 2014 = 100)



# Quarterly Report

Q3 2015

## Quarter 3 2015 v Quarter 3 2014



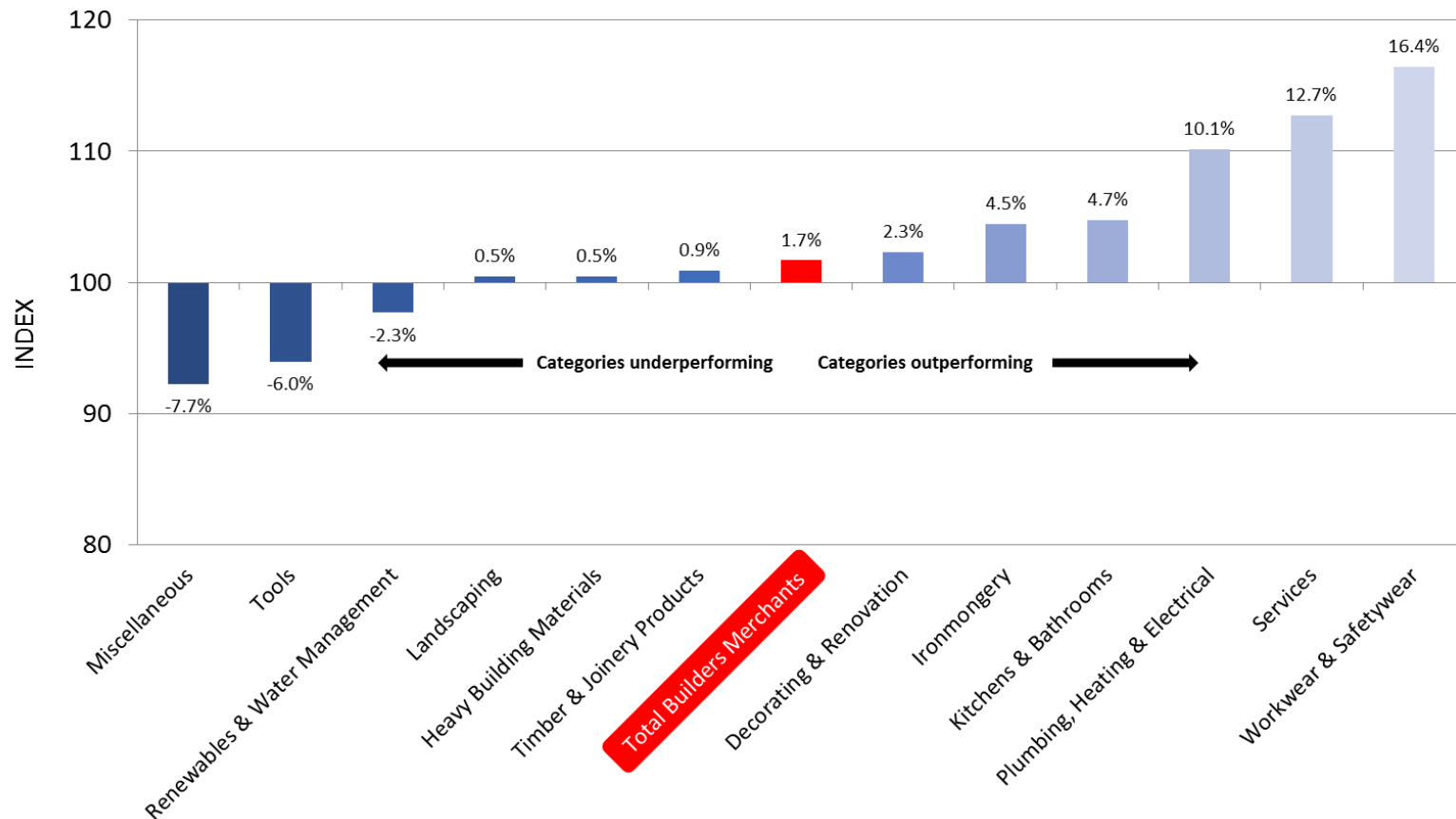


# Quarterly Report

September Year-on-Year Data



## September 2015 v September 2014

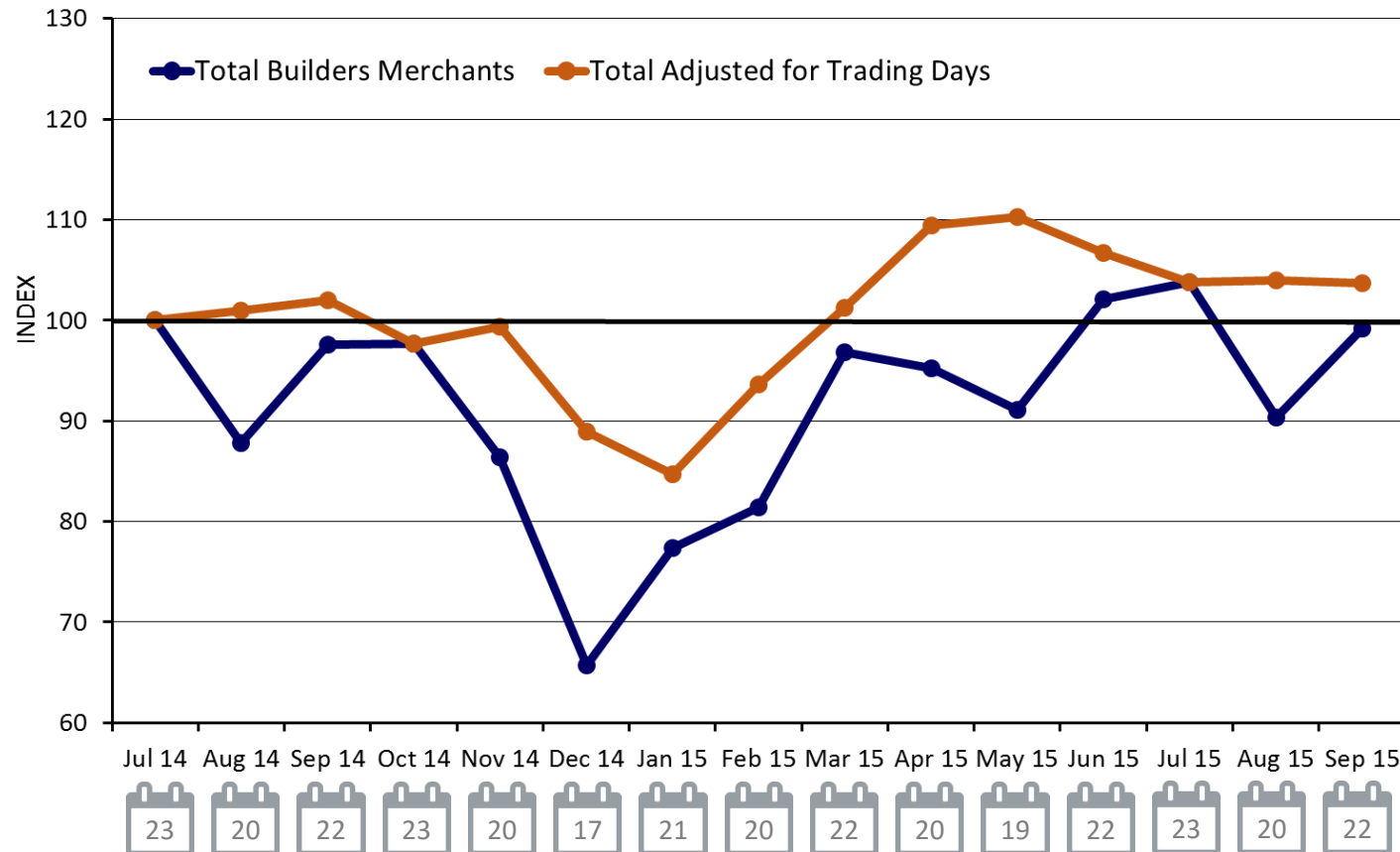


# Quarterly Report

Adjusted for Trading Days



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



# Expert Panel

## Civils, Metal Rainwater & Drainage (part of Heavy Building Materials)



**Steve Durdant-Hollamby, Managing Director Alumasc Water Management Solutions is BMBI's Expert for Civils, Metal Rainwater & Drainage.**

With a broad range of water management products that collect and channel rainwater efficiently either from the roof or from the surface to below ground and away, Civils, Metal Rainwater & Drainage tends to follow overall Heavy Building Materials category trends. Q3 2015 is up around 2% compared with the third quarter of 2014.

Order books are healthy, and we expect Q4 2015 to be up on Q4 2014. But start dates have been dragged out with re-bidding of contracts and skills shortages.

August was disappointing for the industry with more people on holiday for longer periods. Many of the European workforce went home during August and early September.

The skills shortage is pushing up labour rates. Keeping staff is a problem for many businesses as competition for skilled staff increases.

But the biggest long term challenge is learning how to build for today's climate and tomorrow's, rather than yesterday's climate. Climate change is a topic of intense debate, but we don't need to go far to find the proof that Britain needs to find a solution quickly.

The Thames Barrier was built to protect London from flooding and North Sea surges, and was designed to close 2-3 times a year. It shut just 8 times in the 1980s, but 31 times in 1990s, 80 times in the 2000s, and 55 times from 2010 up to mid-2014.

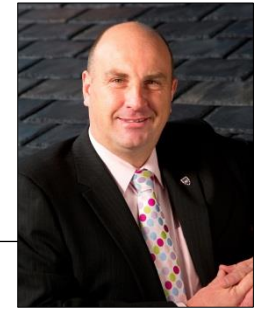
Forty one of these recent closures were to protect against prolonged heavy rainfall in the Thames catchment area, not tidal surges from the east. And, heavy rains and more frequent storms are having other effects on London's homes and businesses.

Britain has seen an increase in flooding and storms in recent years. We've paved over much of our urban landscape and reduced natural drainage where rain can drain in a controlled and sustainable way. An important part of the solution is more integrated drainage, at every stage to cope with more storms and increased rainfall.

We need to change how we build and manage water in new and existing buildings, and adopt joined up thinking and support for all levels of the supply chain – specifiers, engineers, property managers, merchants and builders – before we run out of time or options.

# Expert Panel

## Roofing Products (part of Heavy Building Materials)



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

The Builders Merchant Building Index is just a few months old, but year on year comparisons show RMI lagging behind housebuilding and infrastructure.

Construction Products Association (CPA) figures, which were better than some of us were experiencing, are heavily influenced by housing and infrastructure. Media commentary also draws conclusions from published results of listed housebuilders and large companies focused on bigger infrastructure projects. But few of them have much to do with RMI.

Overall, Roofing is marginally down compared to the main heavy building materials which are 1.9% up on last year (Q315 compared with Q314).

Pitched roofing, which includes tiles, slates and associated products and is the larger roofing sector, was focused on getting higher performance products into stock in the first half of 2015, so roofers and builders meet new regulations and use the appropriate breather membranes. These prevent wind uplift and air 'ballooning' which might dislodge tiles or slates in expected more extreme weather events.

Flat roofing is down overall, but this disguises significant changes in types of roofing. Liquid products and EPDM are up, but bituminous based roofing, flat roof and commodity products eg for shed felt markets are down more than 10% on last year because of fewer storms and skills shortages.

The skills shortage is a big, ongoing problem for the industry. Lack of skills has become a drag on growth. Since 2008, the CPA reports that 390,000 people have left construction yet with construction numbers up the mix must have changed significantly which goes some way to explain why RMI is performing below trend.

Water management and energy efficiency will be key drivers in roofing. Insulation values will increase but the government has eased regulations, so the challenge is to persuade builders directly, because energy efficient roofs cost more to install. Builders generally build 'cold' flat roofs rather than warm well insulated ones.

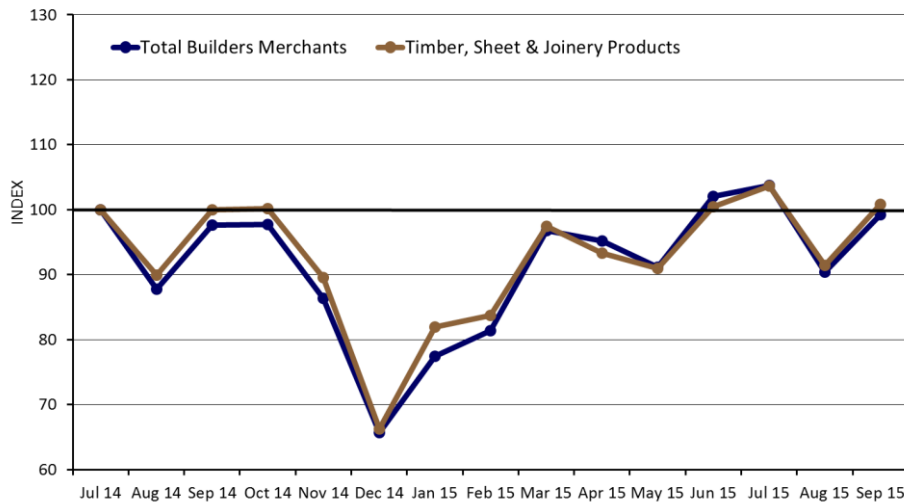
Looking ahead, the first quarter is generally poor: winter is not roofing weather. But we expect commercial RMI eg schools, universities, renovations to hold up well in 2016. Domestic RMI remains a concern because of the skills shortage.

# Quarterly Report

**Q3 2015**

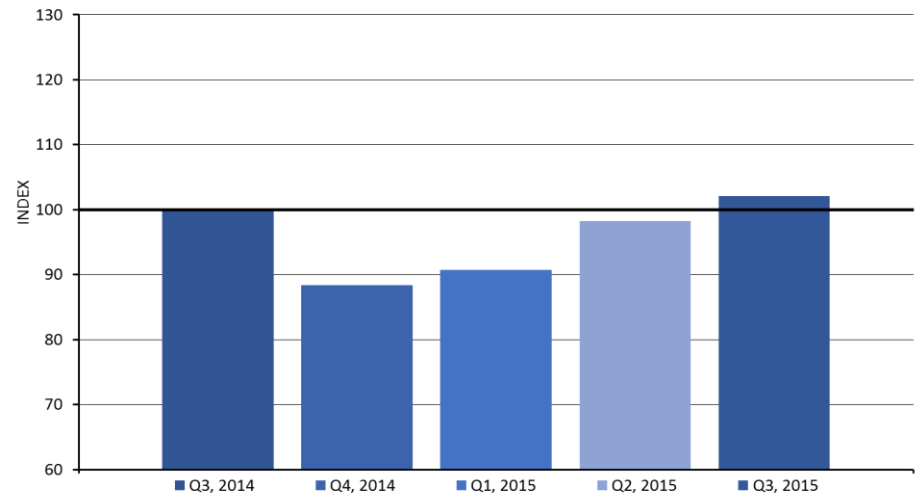


**Timber, Sheet & Joinery Products - Monthly**



Monthly chart indexed on July 2014

**Timber, Sheet & Joinery Products - Quarterly**



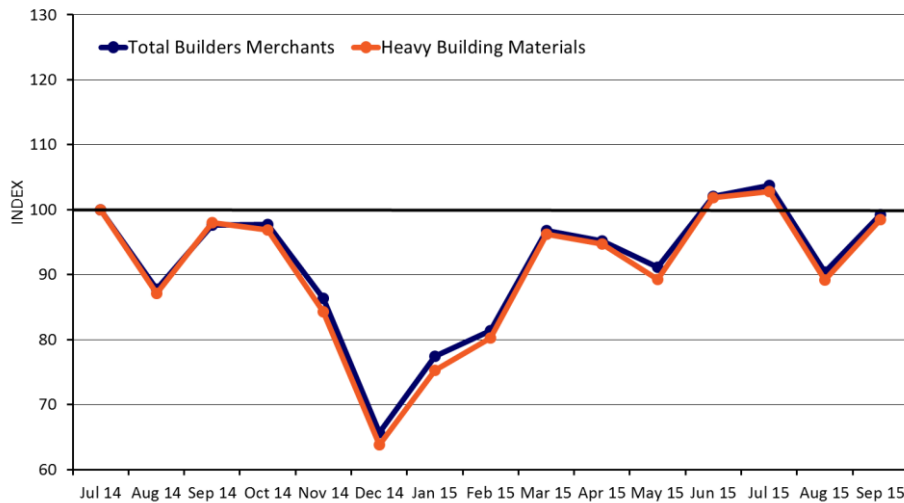
Quarterly chart indexed on Q3 2014

# Quarterly Report

## Q3 2015

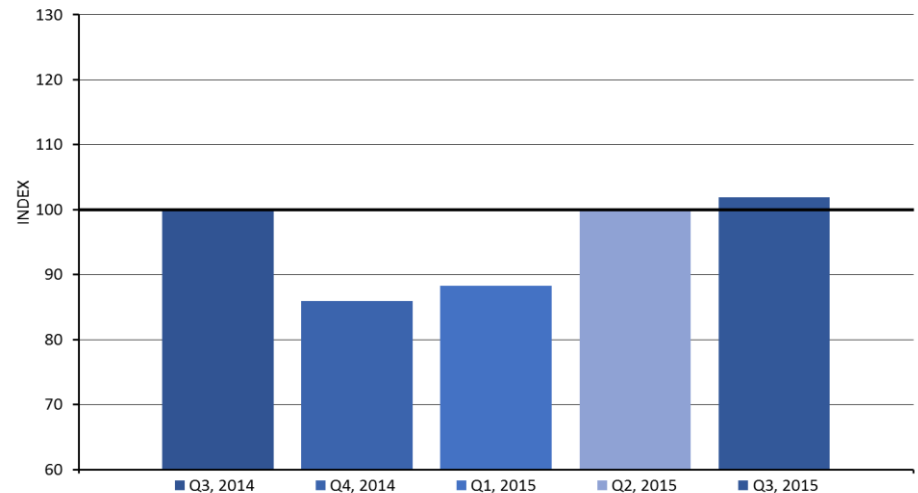


### Heavy Building Materials - Monthly



Monthly chart indexed on July 2014

### Heavy Building Materials - Quarterly



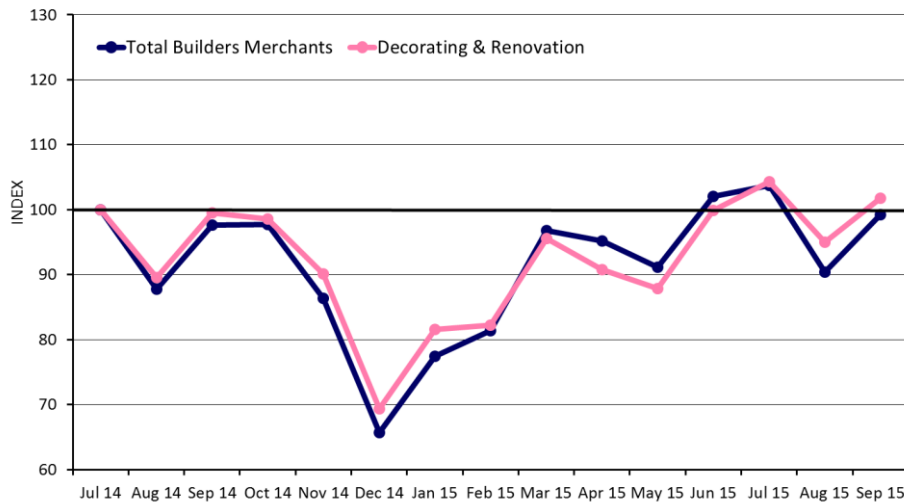
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

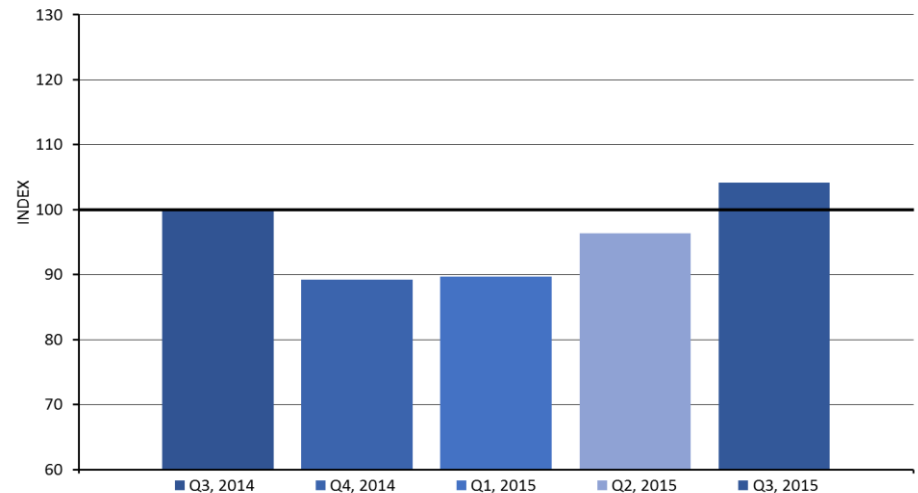


**Decorating & Renovation - Monthly**



Monthly chart indexed on July 2014

**Decorating & Renovation - Quarterly**



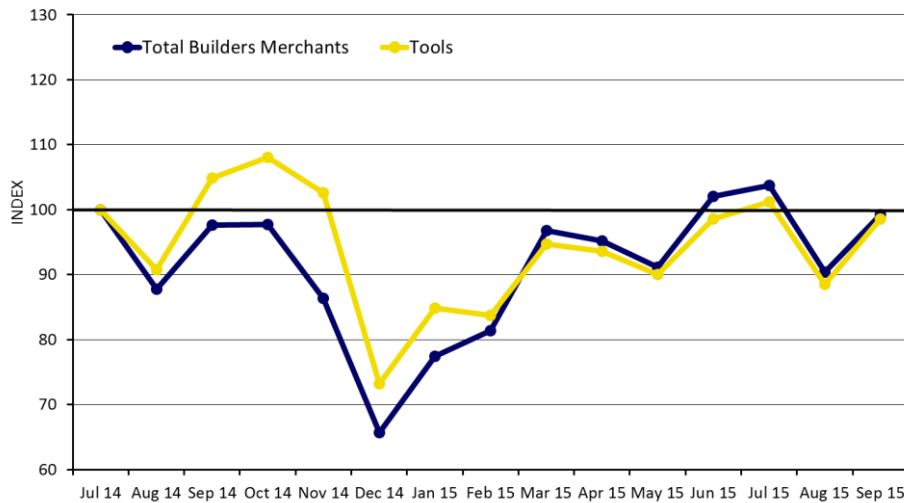
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

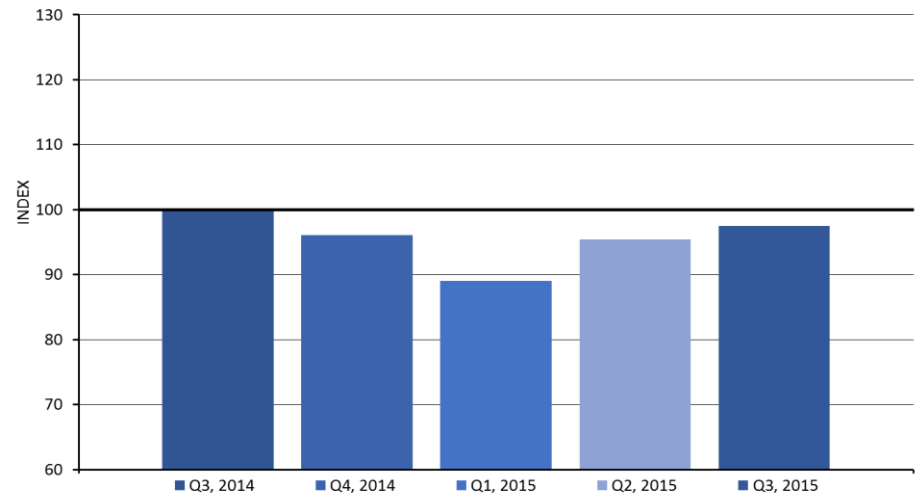


**Tools - Monthly**



Monthly chart indexed on July 2014

**Tools - Quarterly**



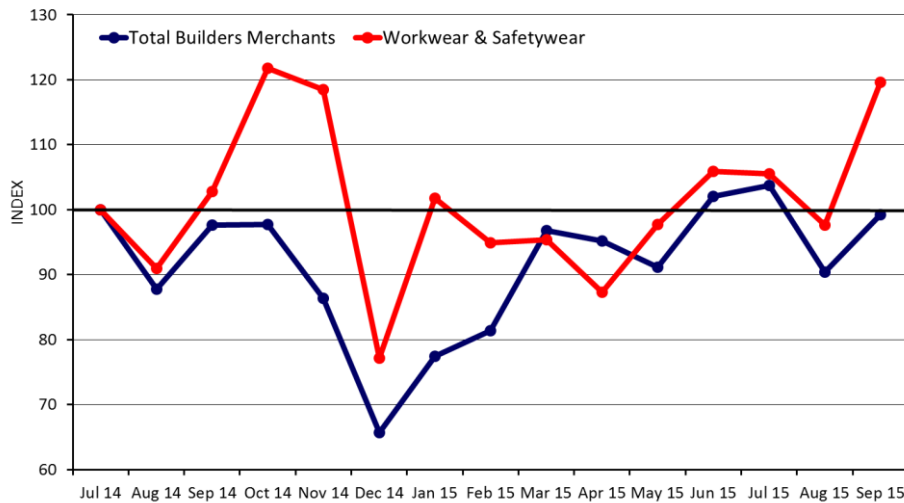
Quarterly chart indexed on Q3 2014



# Quarterly Report

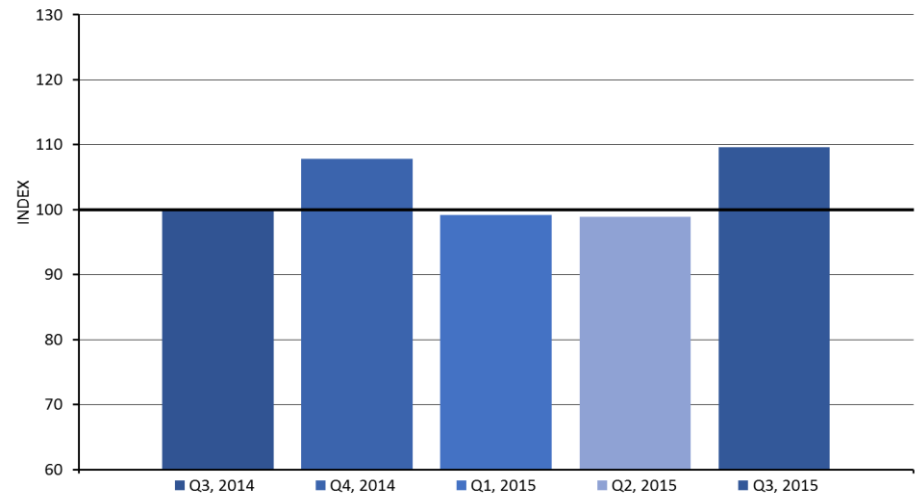
## Q3 2015

### Workwear & Safetywear - Monthly



Monthly chart indexed on July 2014

### Workwear & Safetywear - Quarterly



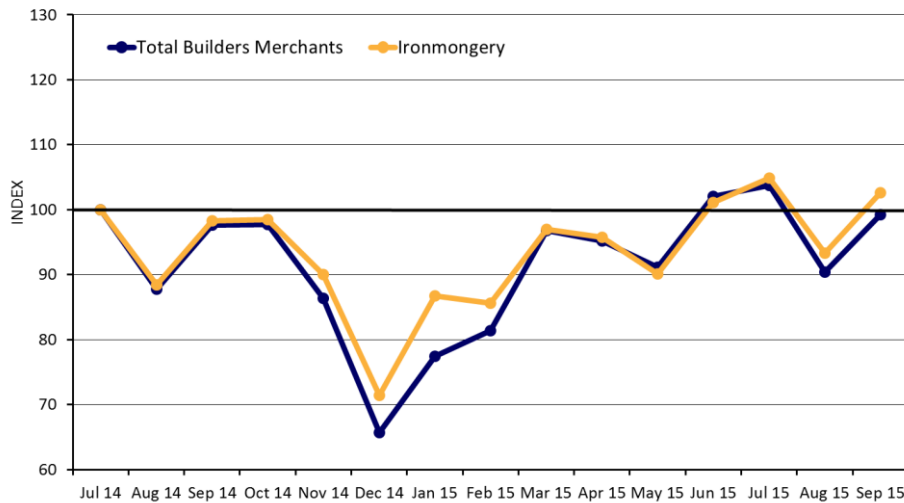
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

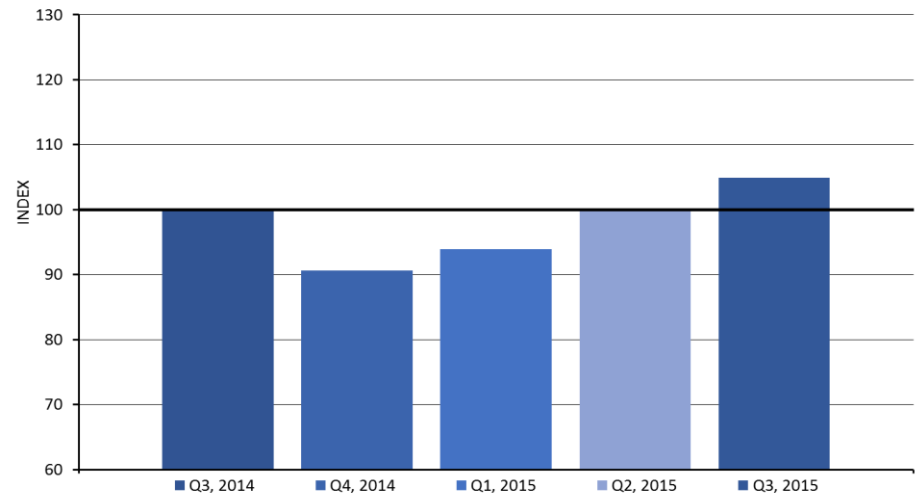


### Ironmongery - Monthly



Monthly chart indexed on July 2014

### Ironmongery - Quarterly



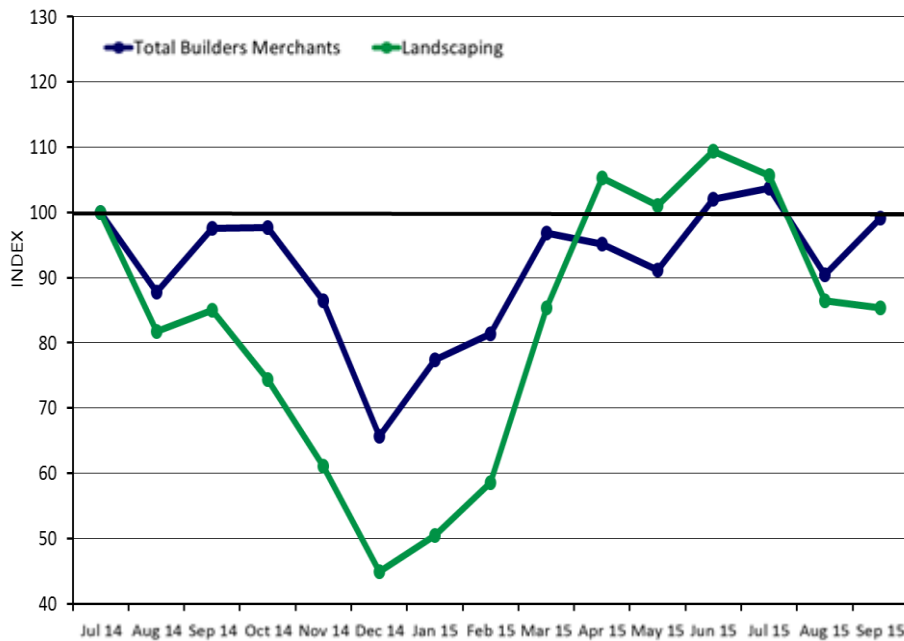
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

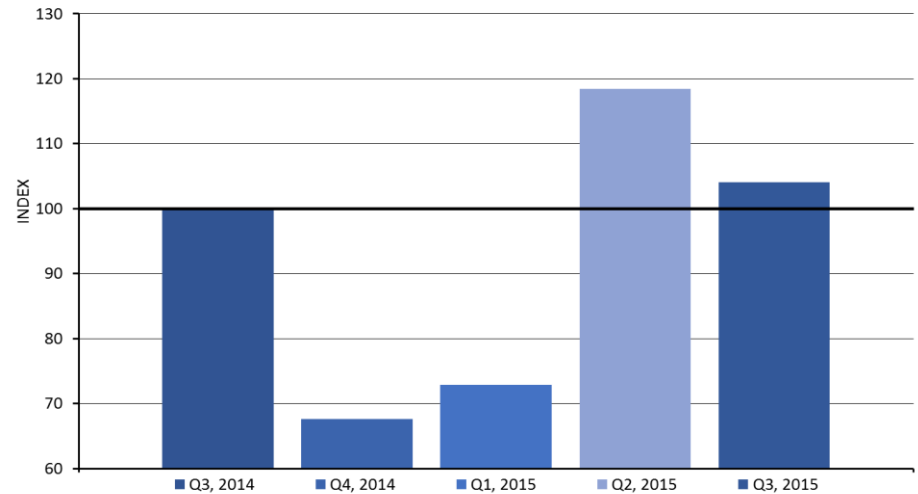


**Landscaping - Monthly**



Monthly chart indexed on July 2014

**Landscaping - Quarterly**



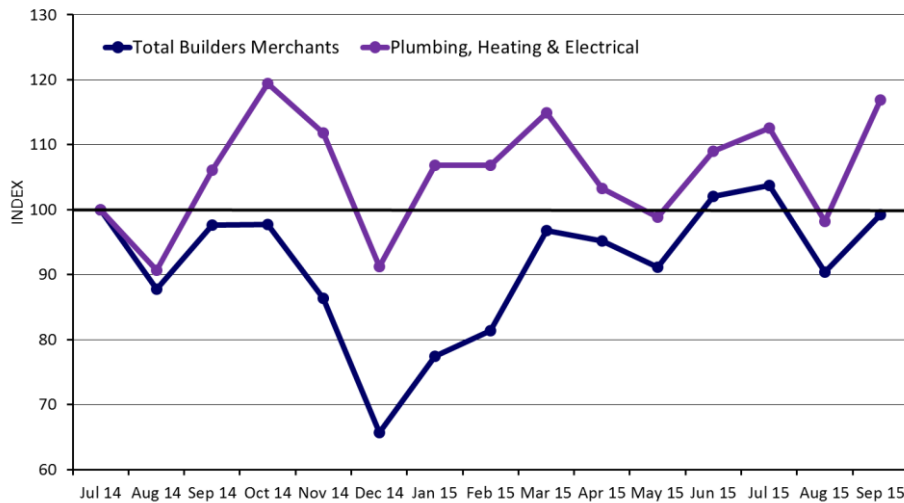
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

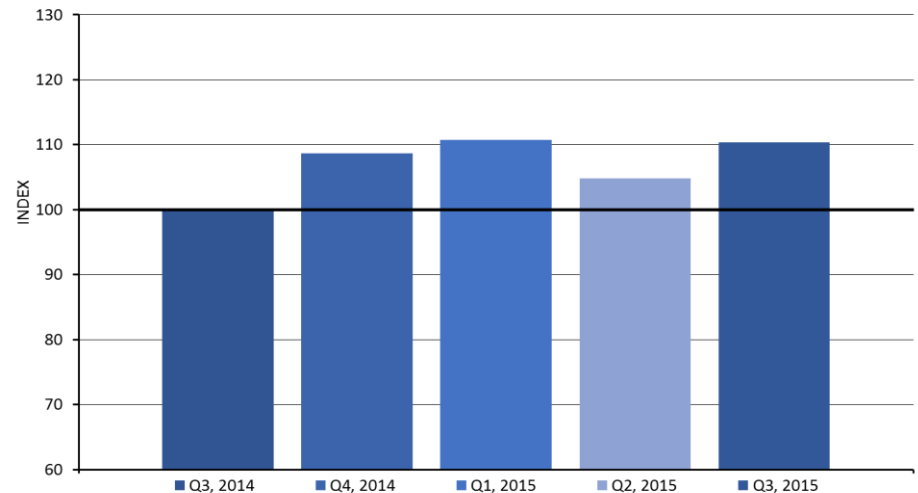


**Plumbing, Heating & Electrical - Monthly**



Monthly chart indexed on July 2014

**Plumbing Heating & Electrical - Quarterly**



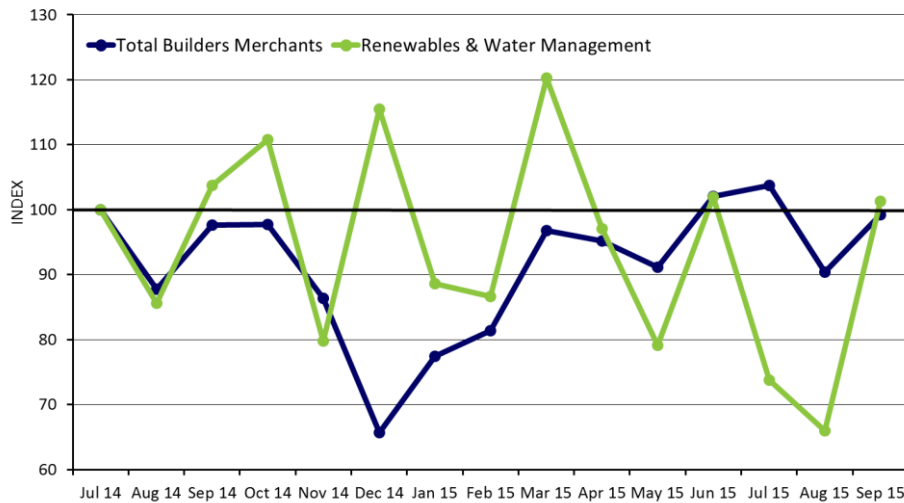
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

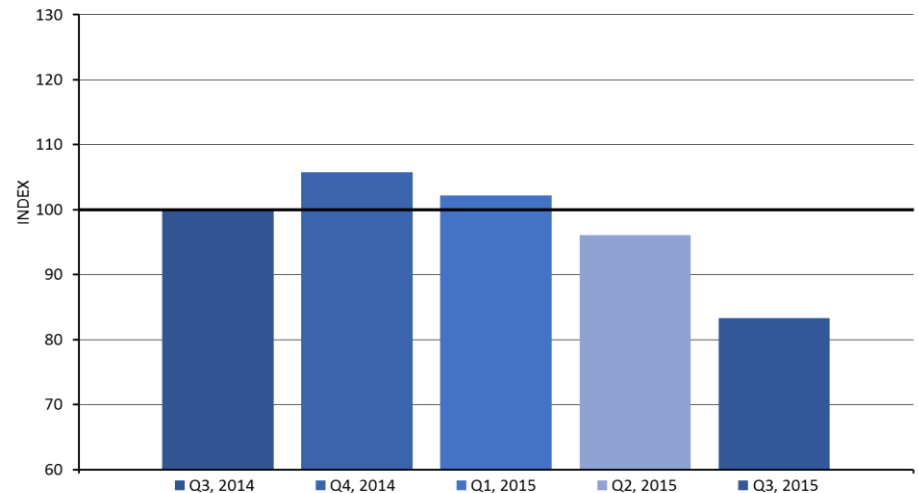


**Renewables & Water Management - Monthly**



Monthly chart indexed on July 2014

**Renewables & Water Management - Quarterly**



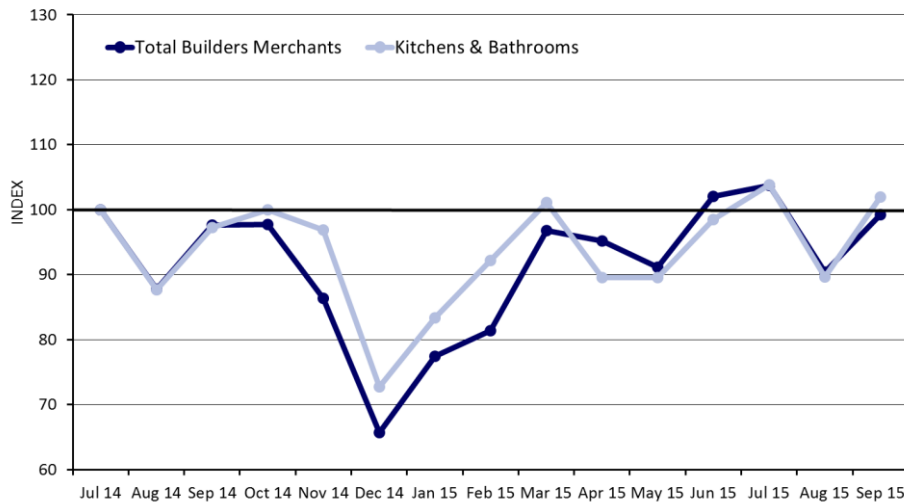
Quarterly chart indexed on Q3 2014

# Quarterly Report

## Q3 2015

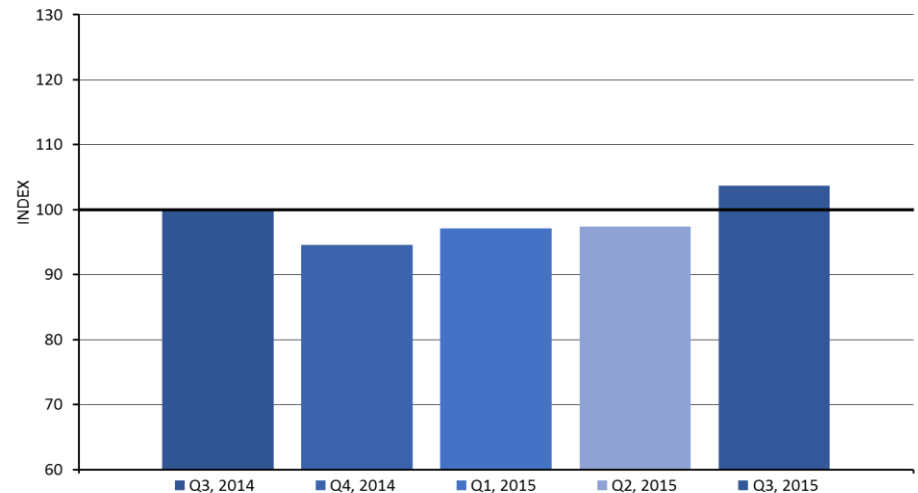


### Kitchens & Bathrooms - Monthly



Monthly chart indexed on July 2014

### Kitchens & Bathrooms - Quarterly



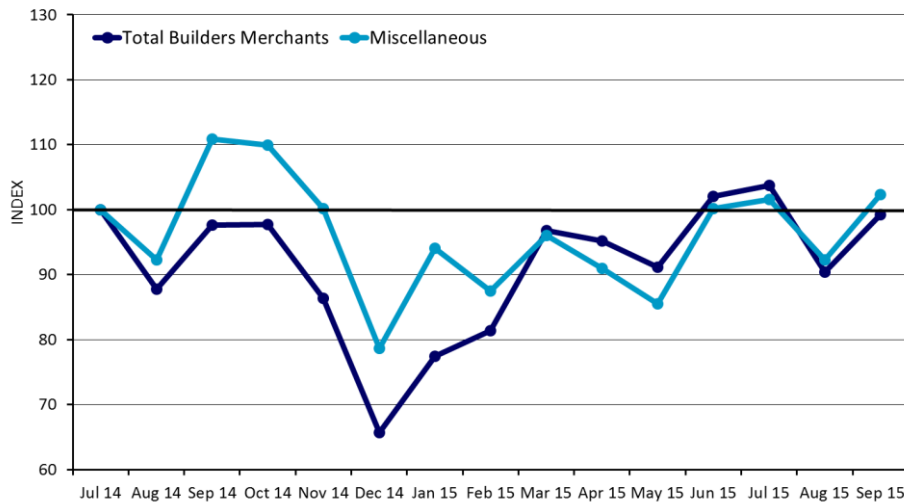
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

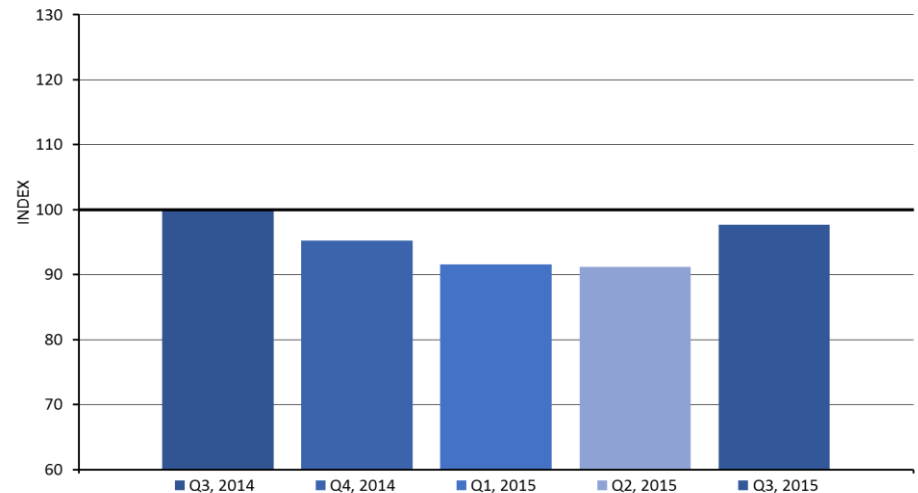


**Miscellaneous - Monthly**



Monthly chart indexed on July 2014

**Miscellaneous - Quarterly**



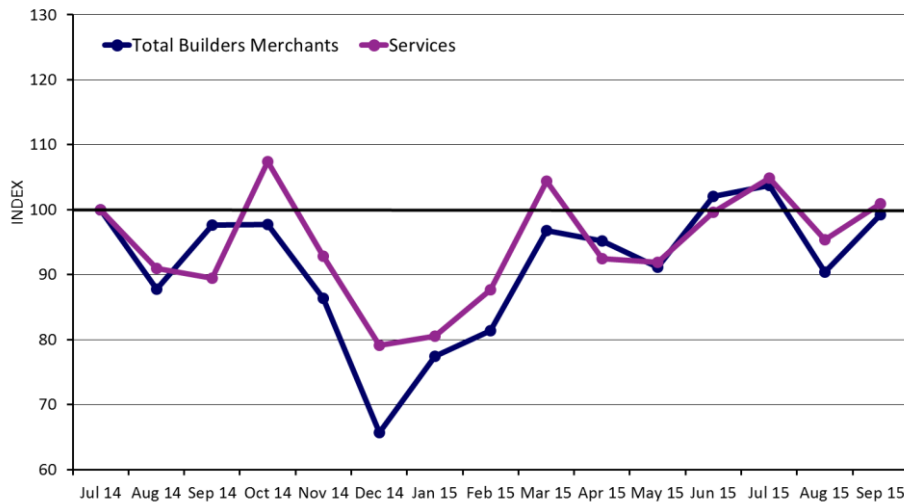
Quarterly chart indexed on Q3 2014

# Quarterly Report

**Q3 2015**

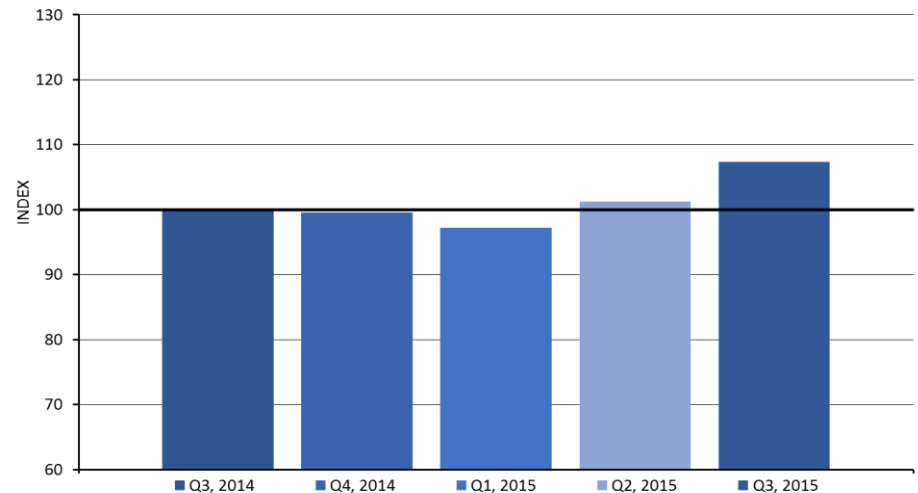


**Services - Monthly**



Monthly chart indexed on July 2014

**Services - Quarterly**



Quarterly chart indexed on Q3 2014

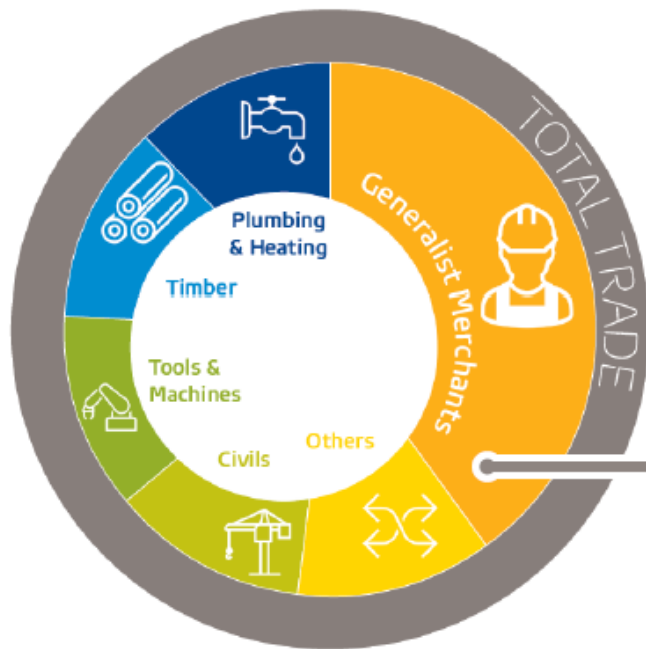


# GfK's Panel

## Generalists Builders Merchant Panel (GBMs\*)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

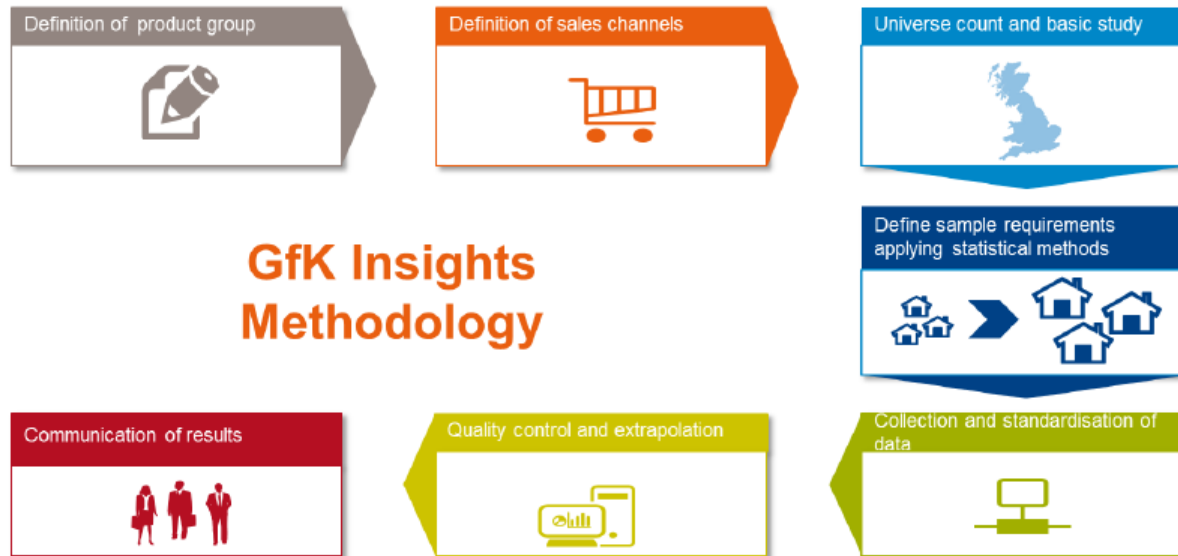
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

#### Examples include:

National	<b>BUILDBASE</b>
	<b>JEWSON</b>
	<b>TP Travis Perkins</b>
Multi Regional	<b>EHSmith</b>
	<b>MKM</b>
	<b>gibbs &amp; dandy</b>
Regional	<b>RIDGEONS</b>
	<b>Bradford's</b>
	<b>COVERS</b>

# 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



## TIMBER, SHEET & JOINERY

TIMBER

SHEET MATERIALS

FLOORING

MOULDINGS

STAIRS & STAIRPARTS

WINDOW & FRAMES

DOORS/DOOR FRAMES

OTHER TIMBER PRODUCTS

## HEAVY BUILDING MATERIALS

BRICKS / BLOCKS / DAMP PROOFING

DRAINAGE/ CIVILS/ GUTTERING

LINTELS / PADSTONES

CEMENT / AGGREGATE / CEMENT ACCS

PLASTERS, PLASTERBOARDS AND ACCESSORIES

ROOFING PRODUCTS

INSULATION

BUILDERS METALWORK

OTHER HEAVY BUILDING EQUIPMENT/MATERIAL

## DECORATING & RENOVATION

PAINT / WOODCARE

PAINT BRUSHES / ROLLERS / PADS

ADHESIVES / SEALANTS / FILLERS

TILES AND TILING ACCESSORIES

DEC PREPARATION AND SUNDRIES

## TOOLS

HAND TOOLS

POWER TOOLS

POWER TOOL ACCESSORIES

SITE / BUILDING EQUIPMENT

LADDERS & ACCESS EQUIPMENT

## WORKWEAR & SAFETYWEAR

CLOTHING

PPE

SAFETY EQUIPMENT

## IRONMONGERY

FIXINGS AND FASTENINGS

SECURITY

DOOR FURNITURE

OTHER IRONMONGERY

## LANDSCAPING

GARDEN WALLING / PAVING

DRIVEWAYS / BLOCK PAVING / KERBS

DECORATIVE AGGREGATES

FENCING AND GATES

DECKING

GARDEN HAND TOOLS

GARDEN POWER TOOLS

OTHER GARDENING EQUIPMENT

## PLUMBING, HEATING & ELECTRICAL

PLUMBING EQUIPMENT

BOILERS, TANKS AND ACCESSORIES

HEATING EQUIPMENT AND WATER HEATERS

RADIATORS AND ACCESSORIES

ELECTRICAL EQUIPMENT

LIGHTING AND LIGHT BULBS

## RENEWABLES & WATER MANAGEMENT

WATER SAVING

RENEWABLES & VENTILATION

## KITCHENS & BATHROOMS

BATHROOM

SHOWERING

FITTED KITCHENS

MAJOR APPLIANCES

## MISCELLANEOUS

CLEANING

AUTOMOTIVE

OTHER

## SERVICES

TOOL HIRE

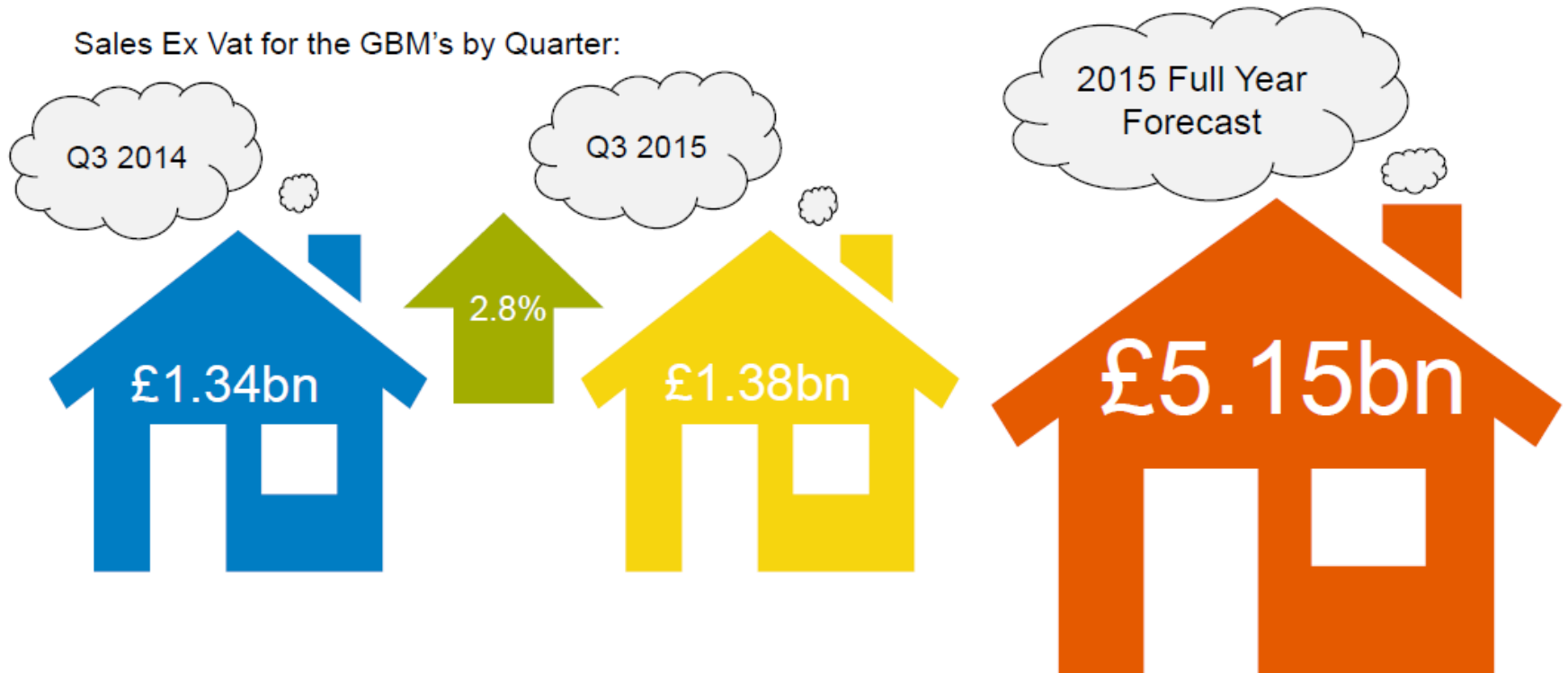
OTHER SERVICES

# GfK Insights



The first quarter on previous years quarter can now be reviewed!  
The news is good! Year on year growth in Q3 2015 on 2014 of 2.8%

Sales Ex Vat for the GBM's by Quarter:



Source: GfK's GBM TCR report. Data July 2014 to Sept 2015 showing £ ex Vat Value

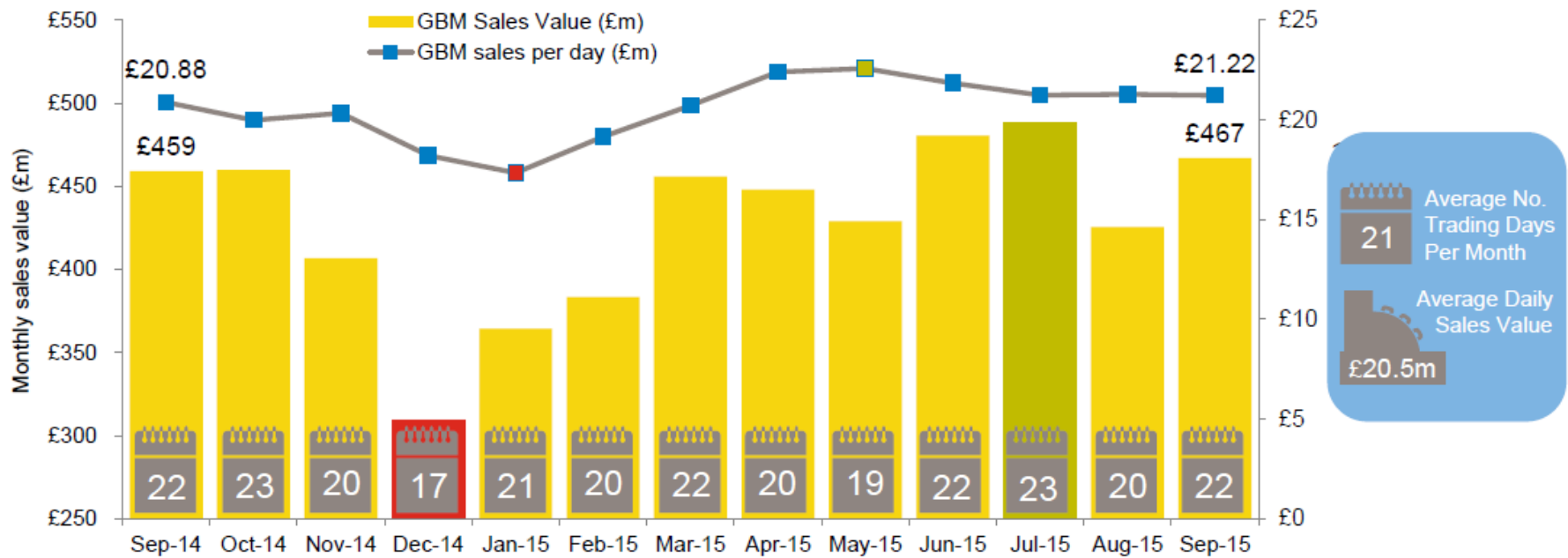
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# GfK Insights



With sales expected to drop off in Q4 are you ready to implement range changes between November and January?

Range planning should be completed by Nov for implementation by Feb to reduce the impact on sales.

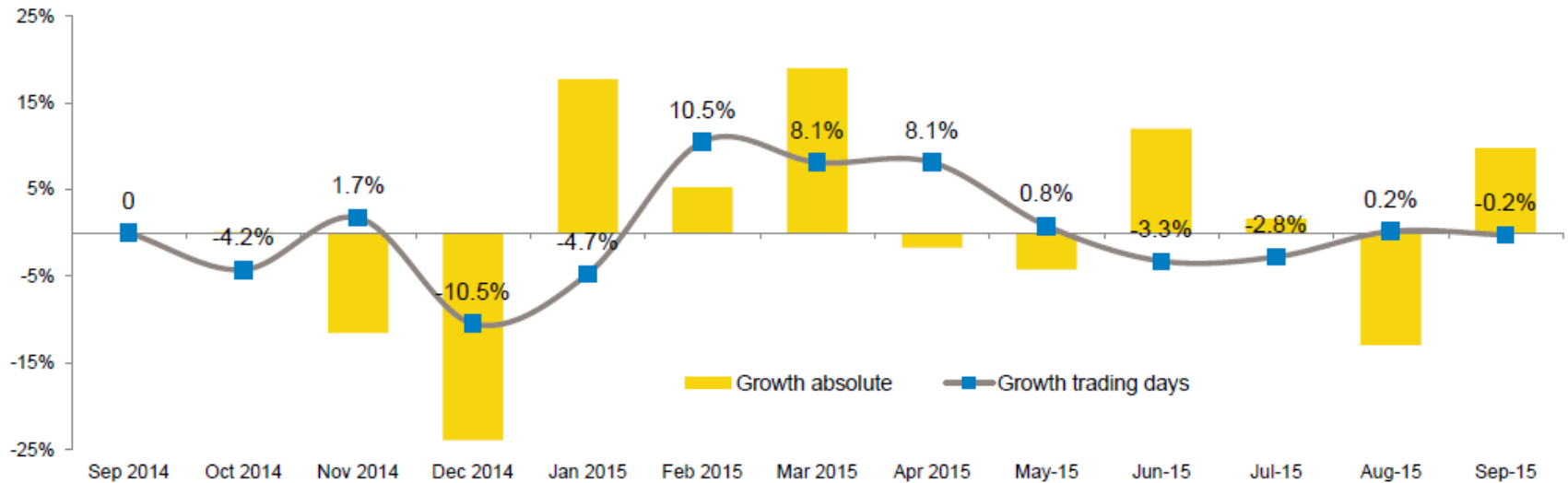


Source: GfK's GBM TCR report. Data July 2014 to Sept 2015 showing £ ex Vat Value  
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## Absolute growth vs growth per trading day

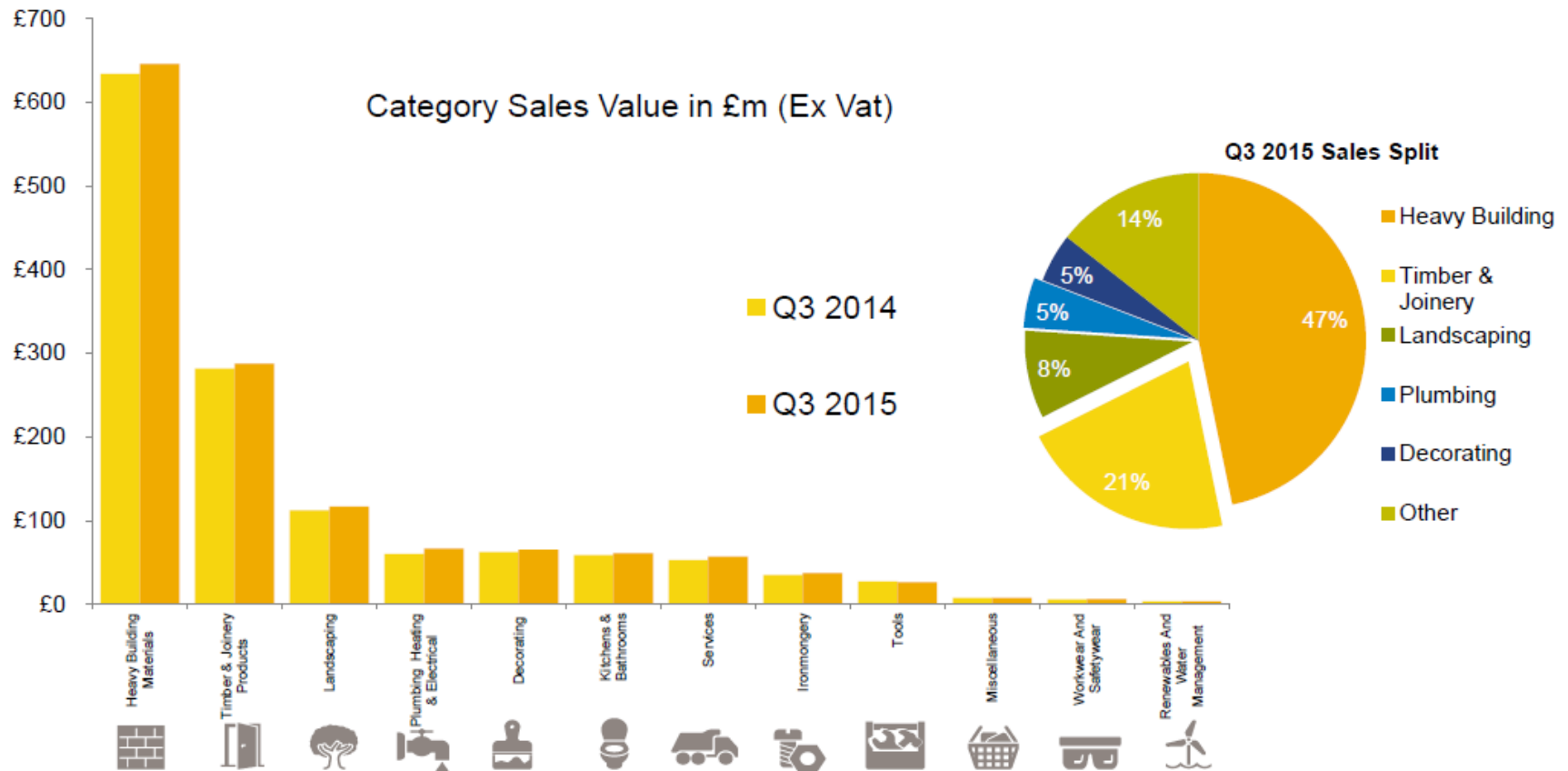


August MoM growth vs July was down 13% in absolute terms. However when factoring trading days it is actually 0.2% more valuable per day than July the highest value month.



Source: GfK's GBM TCR report. Data July 2014 to Sept 2015 showing £ ex Vat Value

## Total GBM sales value by Category – Year on Year



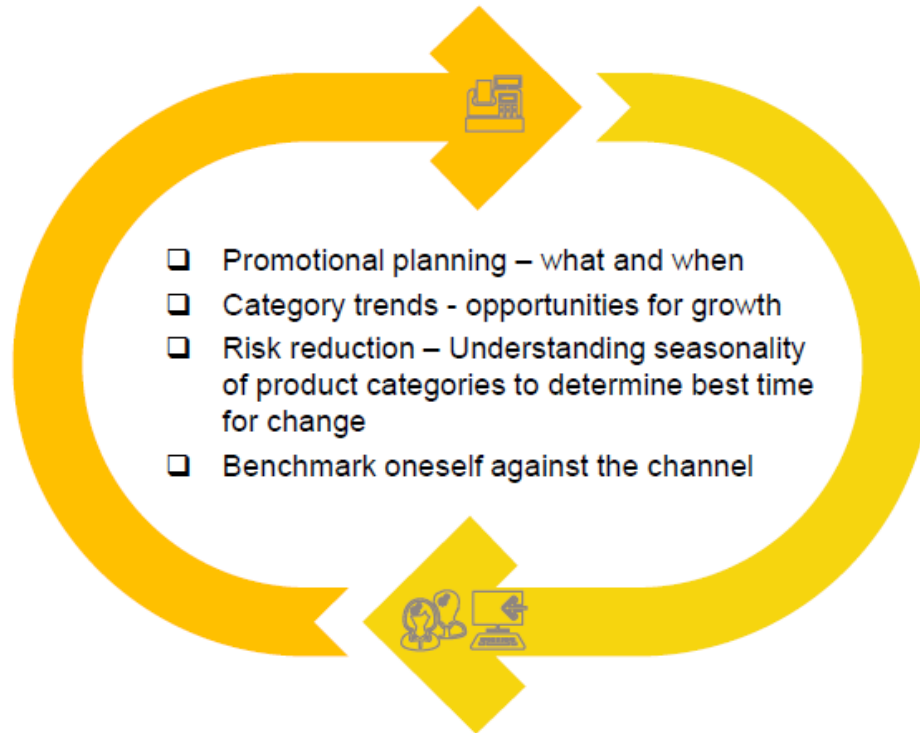
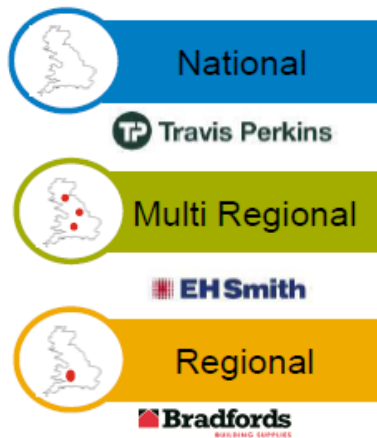
Source: GfK's GBM TCR report. Data July 2014 to Sept 2015 showing Ex Vat Value

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# GfK Insights



How can these top level insights help.

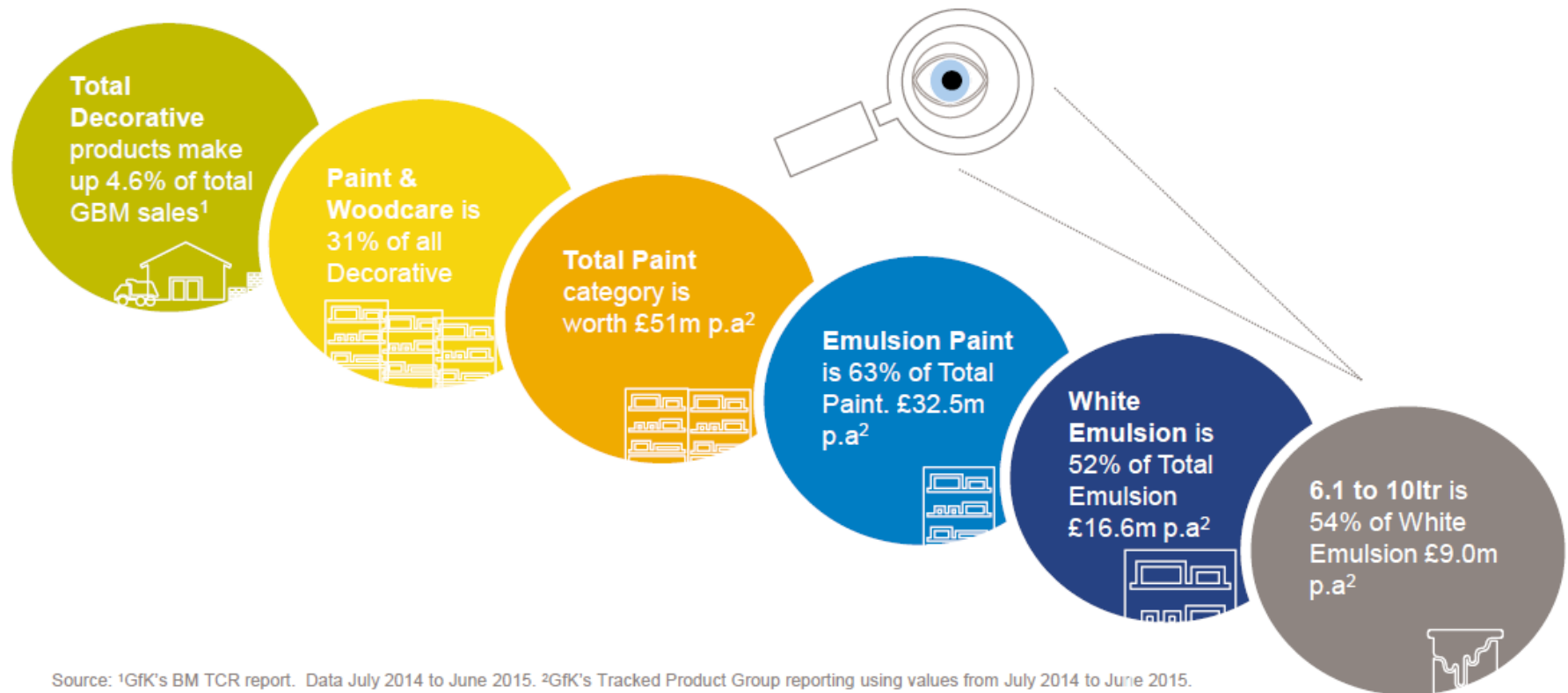




# GfK Insights



Product group insights at feature level are available.  
Enabling informed strategic and tactical decision making.



Source: <sup>1</sup>GfK's BM TCR report. Data July 2014 to June 2015. <sup>2</sup>GfK's Tracked Product Group reporting using values from July 2014 to June 2015.

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# Macro factors impacting Merchants



## The future looks bright



How quickly are you reacting to and building on this positivity in the market place?

How will you address increased intentions from GB adults to build / improve homes in the next 12-24 months?

# Macro factors impacting Merchants



## Some industry commentary

“I am expecting the market to slow”... “Price inflation driven by wage rises of an anticipated 3% are expected”...

Peter Hindle MBE – Senior Vice President, Saint-Gobain  
Speaking at the BMF members day 17/09/2015



“Business confidence is falling .....The consumer is now driving the economy”... “Consumer confidence must be a focus”

Vicky Pryce – Senior Economic Advisor, Cebr  
Speaking at the BMF members day 17/09/2015

# Macro factors impacting Merchants



## External factors influencing the channel

Consumers now suggesting a willingness to spend on big ticket items

### GfK Consumer Confidence Index

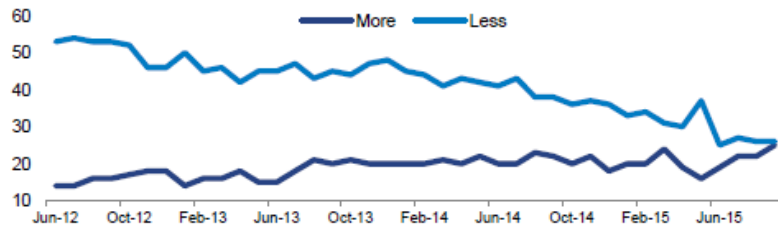


% difference between consumers who think it's the right time to make major purchases (vs not), is at it's highest level since 2008<sup>1</sup>

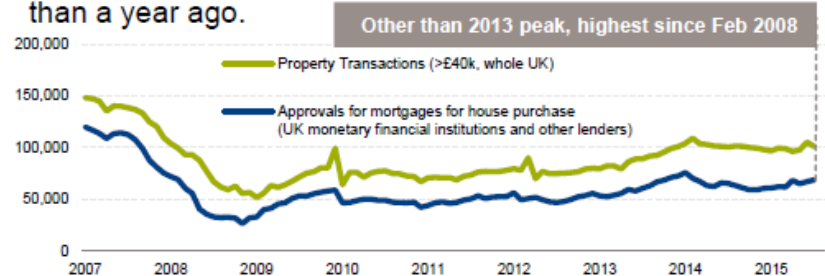
Sept 2015 +12  
 Sept 2014 -1  
 Sept 2008 -31



Gap between consumers who say they will spend more on major<sup>1</sup> purchases vs less, in the next 12-months, has closed.



Mortgage approvals in July 2015 were 5% higher than a year ago.



# Macro factors impacting Merchants

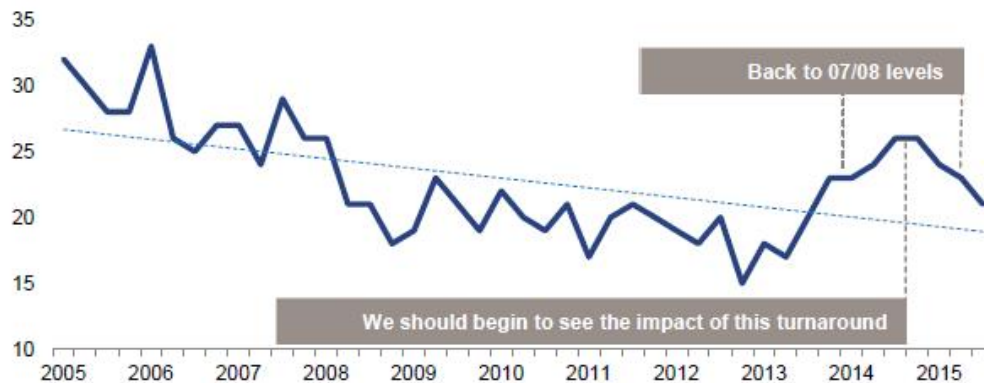


Increased consumer spend will also come from major home improvements



**c.1-in-5** GB adults intend to spend on major home improvement in the next year.

How likely are you to spend large sums of money over the next twelve months on home improvements?  
(Such as central heating, plumbing fixtures, etc)



# Macro factors impacting Merchants



Planned activity within the property market  
- a key driver behind consumer confidence

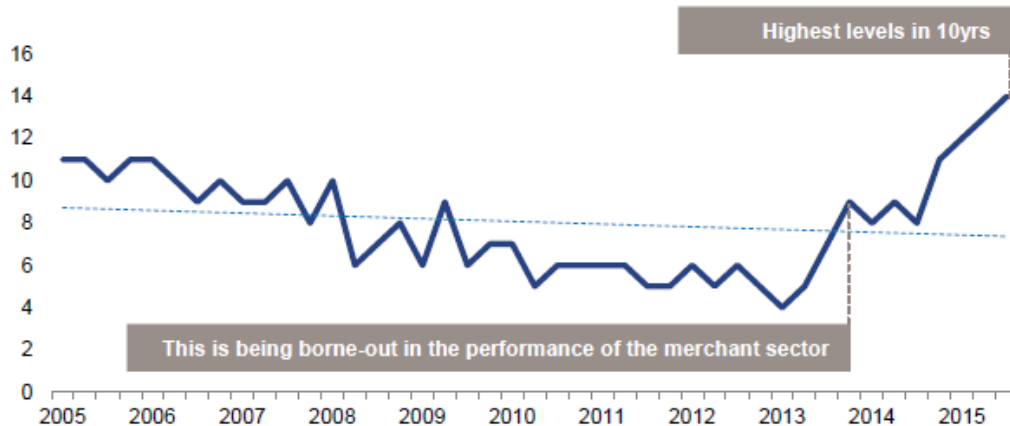


**14%** of GB adults intend to purchase / build a home in the next **2 years**.

Up from **8%** in July 2014 and **5%** in July 2011

Are you planning to purchase or build a home  
within the next two years?

(e.g. to live in, to let, as a holiday home, for a family member, etc.)



*“Sweeping planning reforms have been announced, which the government claims will speed up UK housebuilding and make it easier for homeowners to extend their existing properties”.*

Source: BMN online 14/07/15

# Macro factors impacting Merchants



## UK Housing Market

The growth is going to continue

Average Price **£189k**  
(2014)

Rise in Price **+8% y-o-y**



Source: ONS

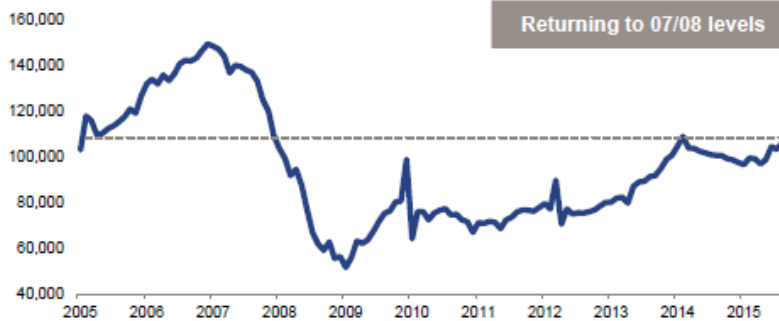
## Property transactions

**1.22m** Transactions in 2014  $\Rightarrow$  **+15%** on 2013



Source: HM Revenue & Customs

## Monthly transactions, residential, seasonally adjusted



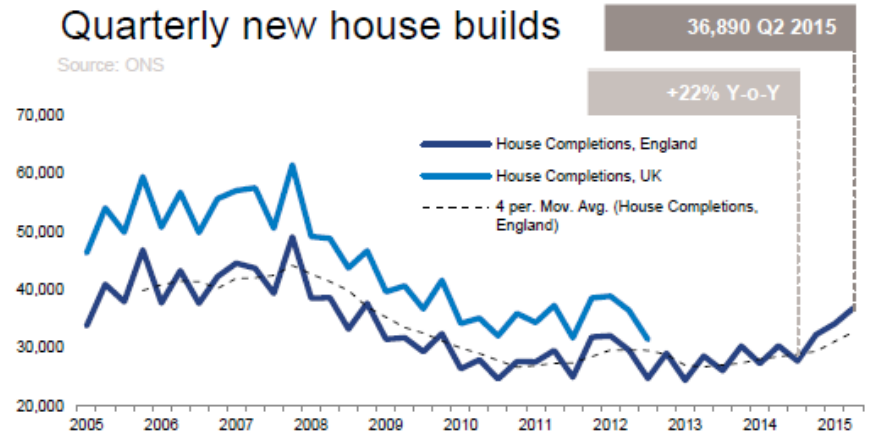
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"We are seeing the highest level of demand since the 1930's...."

Barbara Richmond – Group Finance Director - Redrow  
Speaking at the BMF members day 17/09/2015

## Quarterly new house builds

Source: ONS



Housing minister Brandon Lewis said the government aimed to see one million new homes over this Parliament.  
BBC - Inside Out 21/09/2015

# Contact Us

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