

“one **industry**  
one **voice**”

# Builders Merchant Building Index



Monthly report for November 2017

# Building the Industry & Building Brands from Knowledge



MARKETING EXCELLENCE AWARDS 2018



FINALIST  
BEST USE OF DATA AND INSIGHT - SME



MARKETING EXCELLENCE AWARDS 2018



FINALIST  
INNOVATION - NEW PRODUCT/SERVICE - SME



# Contents - 1

Click links below to visit pages

Click links to visit pages:	Page
<a href="#">Introduction</a>	<a href="#">5</a>
<a href="#">Overview</a>	<a href="#">6</a>
<a href="#">BMBI Expert Panel</a>	<a href="#">7</a>
<b>Monthly data:</b>	
<a href="#">Monthly BMBI indices, by category</a>	<a href="#">8</a>
<a href="#">Monthly index chart, unadjusted and adjusted for trading day differences</a>	<a href="#">9</a>
<a href="#">November index chart, by category</a>	<a href="#">10</a>
<a href="#">Monthly year-on-year chart, unadjusted and adjusted for trading day differences</a>	<a href="#">11</a>
<a href="#">November year-on-year sales index chart, by category</a>	<a href="#">12</a>
<a href="#">November v October sales index chart, by category</a>	<a href="#">13</a>
<b>Quarterly data:</b>	
<a href="#">Quarterly BMBI indices, by category</a>	<a href="#">14</a>
<a href="#">Quarter 3 index chart, unadjusted and adjusted for trading day differences</a>	<a href="#">15</a>
<a href="#">Quarter 3 index chart, by category</a>	<a href="#">16</a>
<a href="#">Quarter 3 average sales per day index chart, by category</a>	<a href="#">17</a>
<a href="#">Quarterly indices, by categories</a>	<a href="#">18</a>
<a href="#">Quarter 3 year-on-year chart, unadjusted and adjusted for trading day differences</a>	<a href="#">19</a>
<a href="#">Quarter 3 year-on-year sales index chart, by category</a>	<a href="#">20</a>
<a href="#">Quarter 3 year-on-year average sales a day index chart, by category</a>	<a href="#">21</a>
<a href="#">Quarter 3 v Quarter 2 sales index chart, by category</a>	<a href="#">22</a>
<a href="#">Quarter 3 v Quarter 2 average sales a day index chart, by category</a>	<a href="#">23</a>

Continued over the page...

Click links above and overleaf to visit pages. The 'Contents' link below brings you back to this page.

# Contents - 2

Continued: click links below to visit pages



Click links to visit pages:	Page
<b>Full Year data:</b>	
<a href="#">Latest 12 months compared with previous 12 months chart, by category</a>	<a href="#">24</a>
<b>Monthly Category Charts:</b>	
<a href="#">Timber &amp; Joinery Products</a>	<a href="#">25</a>
<a href="#">Heavy Building Materials</a>	<a href="#">25</a>
<a href="#">Decorating</a>	<a href="#">26</a>
<a href="#">Tools</a>	<a href="#">26</a>
<a href="#">Workwear &amp; Safetywear</a>	<a href="#">27</a>
<a href="#">Ironmongery</a>	<a href="#">27</a>
<a href="#">Landscaping</a>	<a href="#">28</a>
<a href="#">Plumbing Heating &amp; Electrical</a>	<a href="#">28</a>
<a href="#">Renewables &amp; Water Saving</a>	<a href="#">29</a>
<a href="#">Kitchens &amp; Bathrooms</a>	<a href="#">29</a>
<a href="#">Miscellaneous</a>	<a href="#">30</a>
<a href="#">Services</a>	<a href="#">30</a>
<a href="#">Methodology</a>	<a href="#">31 - 33</a>
<a href="#">Contacts</a>	<a href="#">34</a>

Quarterly reports contain additional analysis, macro-economic factors and expert comments. Click the images below to read or download the Q3 report.

# 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.

## **BMBI shortlisted for more awards**

Having won Best Product Launch in the recent Construction Marketing Awards, BMBI has now been nominated as finalist in two categories of the prestigious Chartered Institute of Marketing (CIM) Marketing Excellence Awards: 'Best Use of Data and Insight' and 'Innovation – New Product / Service'. BMBI, a collaboration between GfK, BMF and MRA Marketing, provides unique and valuable data on the merchant market and its constituent categories.

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 Richard Frankcom at [richard.frankcom@gfk.com](mailto:richard.frankcom@gfk.com).

Download current and past reports, 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

## A positive November for merchants

Sales increased year on year for the seventh consecutive month, with two categories posting record revenues.

### Year on Year

Total Builders' merchant value sales revenue was up 7.3% in November 2017 compared with November last year, on the same number of trading days. Seven categories did better, including Landscaping (+9.0%), Ironmongery (+8.2%), Tools (+8.0%) and Heavy Building Materials (+7.8%). Although growing less strongly, Plumbing Heating & Electrical (+7.4%) and Kitchens & Bathrooms (+6.2%) had their highest monthly sales since GfK began collecting BMBI data in July 2014. Workwear & Safetywear (-1.6%) was the only category to sell less year on year.

### Month on month

Compared with October (which had the highest-ever BMBI revenue), sales in November were -1.4% lower. Six categories sold more, with Workwear & Safetywear (+16.1%), Plumbing Heating & Electrical (+10.1%) and Kitchens & Bathrooms (+7.0%) strongest. Landscaping, which is highly seasonal, was weakest (-8.6%).

### Other periods

The latest three months (September to November) were 6.7% up on the same three months in 2016, with an equal number of trading days. Plumbing Heating & Electrical (+8.7%), Tools (+8.5%) and Heavy Building Materials (+7.6%) were among six sectors that grew more strongly. All categories saw gains.

Year-to-date sales (January to November) were 5.1% ahead of the same period last year with Ironmongery (+7.3%) strongest. The rolling 12 months (December 2016 to November 2017) were 5.0% better than the preceding 12 months (December 2015 to November 2016) with Kitchens & Bathrooms and Ironmongery (both +6.9%) doing best.

### Index

November's Builders Merchant Building Index was 121.6 (114.7 adjusted for trading days). Plumbing Heating & Electrical (141.9) was highest.

Sales increased year on year for the seventh consecutive month, with two categories posting record revenues.

# 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 Q3 2017 report, which includes commentary from our experts is available [here](#)

### Meet the Builders Merchant Building Index Experts:

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



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

## November 2016\* – November 2017

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



MONTHLY SALES VALUE INDEX	Index	2016		2017										
		Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
<b>Total Builders Merchants</b>	<b>100</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>	<b>121.1</b>	<b>120.2</b>	<b>119.2</b>	<b>120.2</b>	<b>117.5</b>	<b>123.4</b>	<b>121.6</b>
Timber & Joinery Products	100	113.7	76.1	99.1	100.9	121.2	102.9	117.1	116.7	116.3	117.3	116.9	124.4	122.1
Heavy Building Materials	100	114.1	77.0	94.0	100.1	123.0	106.9	122.5	121.2	120.6	121.6	119.4	125.8	122.8
Decorating	100	110.4	76.3	92.8	97.0	115.6	98.8	111.0	111.8	114.6	115.6	110.5	115.4	114.9
Tools	100	111.3	74.8	97.6	101.7	120.7	97.2	107.0	109.9	109.8	110.8	110.4	119.2	119.8
Workwear & Safetywear	100	133.2	72.6	109.5	102.7	114.1	85.1	101.4	99.4	95.2	96.2	107	112.9	131
Ironmongery	100	119.9	84.6	107.5	109.4	129.2	107.5	121.6	124.5	125.6	126.6	123.4	130.6	129.5
Landscaping	100	97.2	62.4	71.0	87.7	129.5	138.1	153.1	146.9	140.8	141.8	117.1	115.8	105.8
Plumbing, Heating & Electrical	100	132.4	94.0	114.9	116.1	128.7	98.3	109.7	110	106.6	107.6	120.3	128.9	141.9
Renewables & Water Saving	100	73.4	42.4	68.1	76.2	90.3	68.2	70.2	69.9	66.6	67.6	69.2	78.3	82.2
Kitchens & Bathrooms	100	121.7	83.8	98.1	110.2	123.6	99.3	111.3	118.3	113.7	114.7	114.5	120.2	128.6
Miscellaneous	100	122.2	92.6	113.2	108.8	124.4	103.4	120.5	113.7	117.2	118.2	119.8	118.4	125.3
Services	100	107.1	81.3	87.8	95.0	115.0	100.6	112.4	109.7	110.6	111.6	110.6	114	109.2

\*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 November 2017

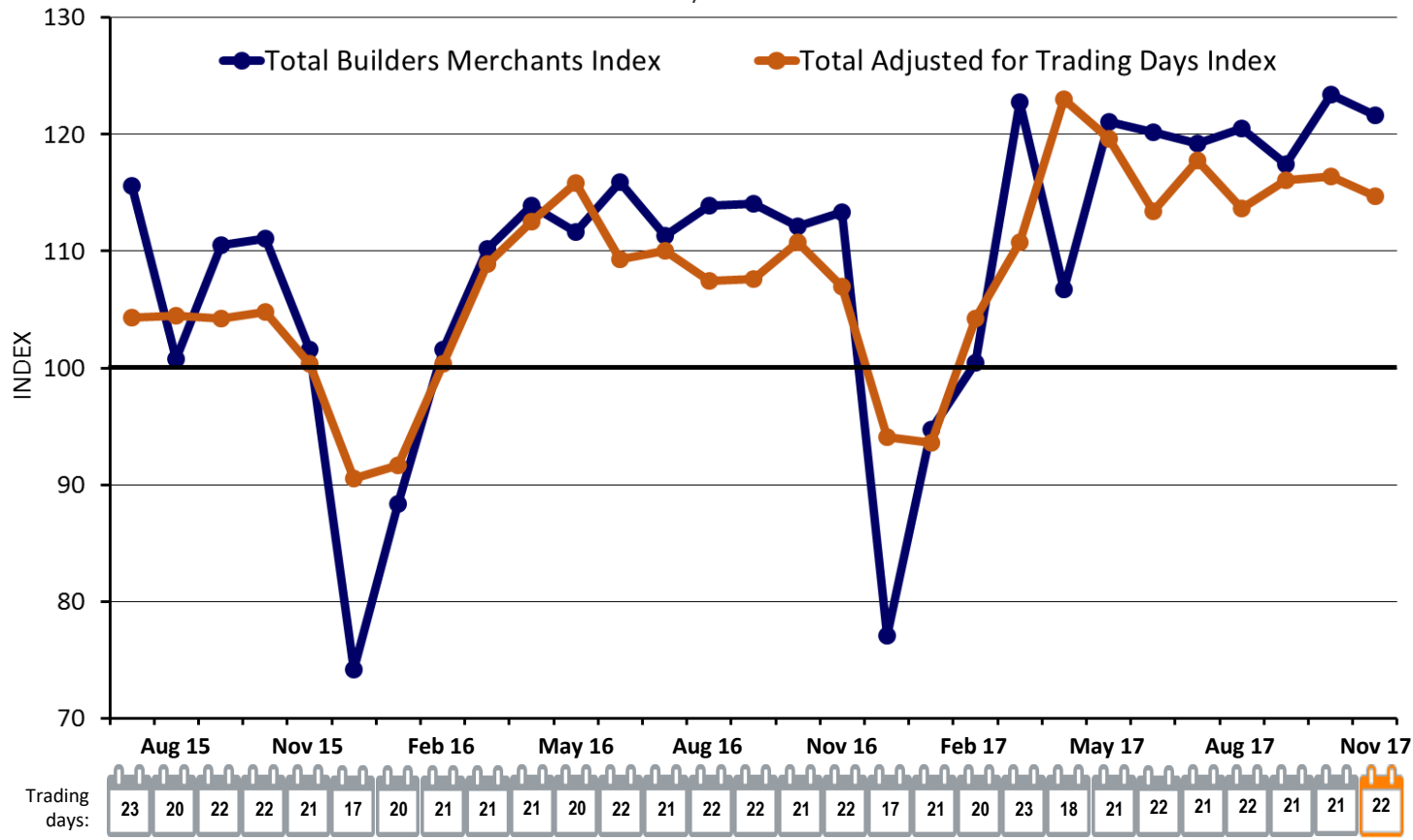


# Monthly: Index

## Adjusted and unadjusted for trading days

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

Indexed on July 2014 - June 2015



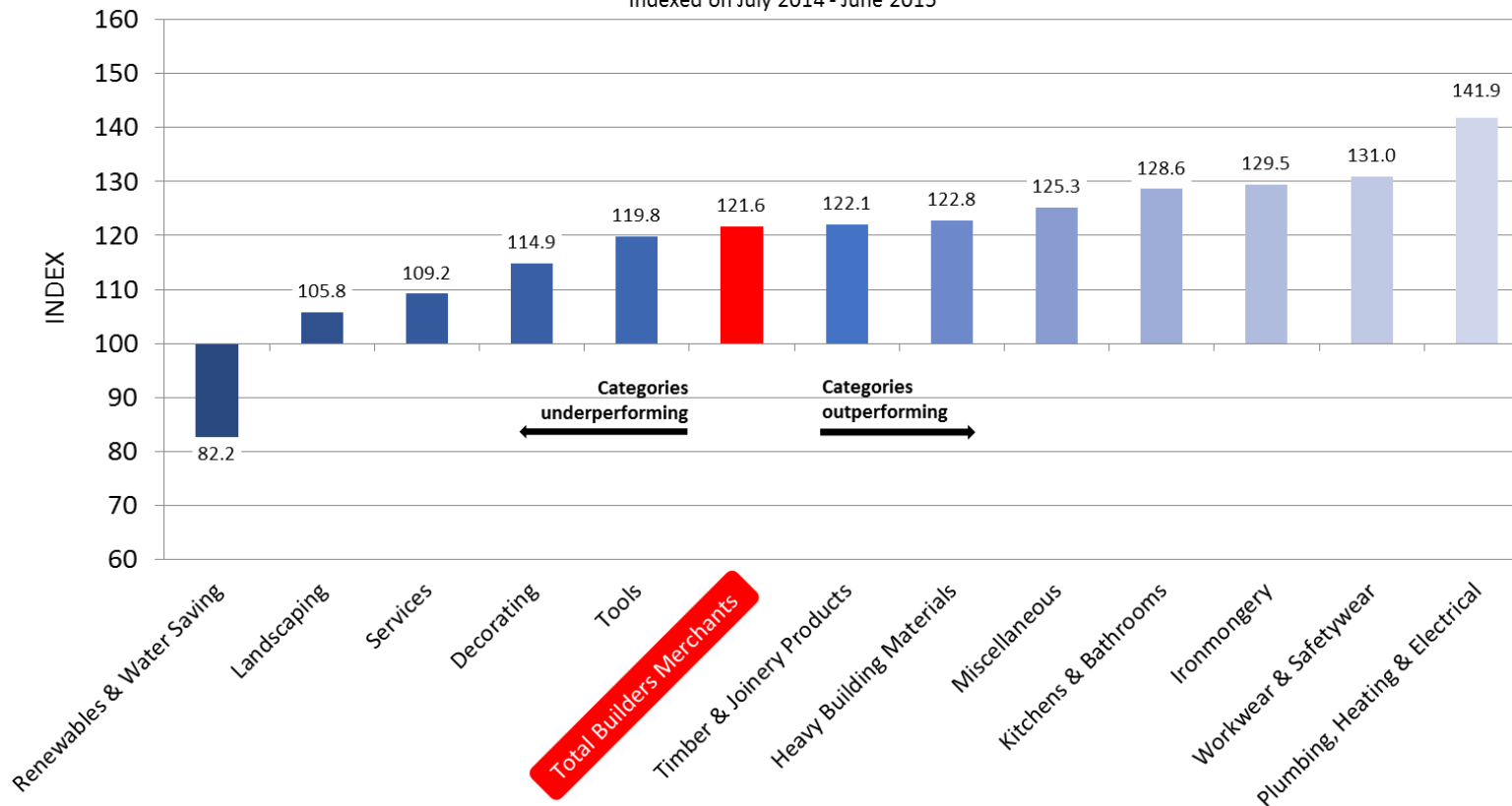
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2017

# Monthly: Index and Categories

## November 2017 index

### November 2017

Indexed on July 2014 - June 2015

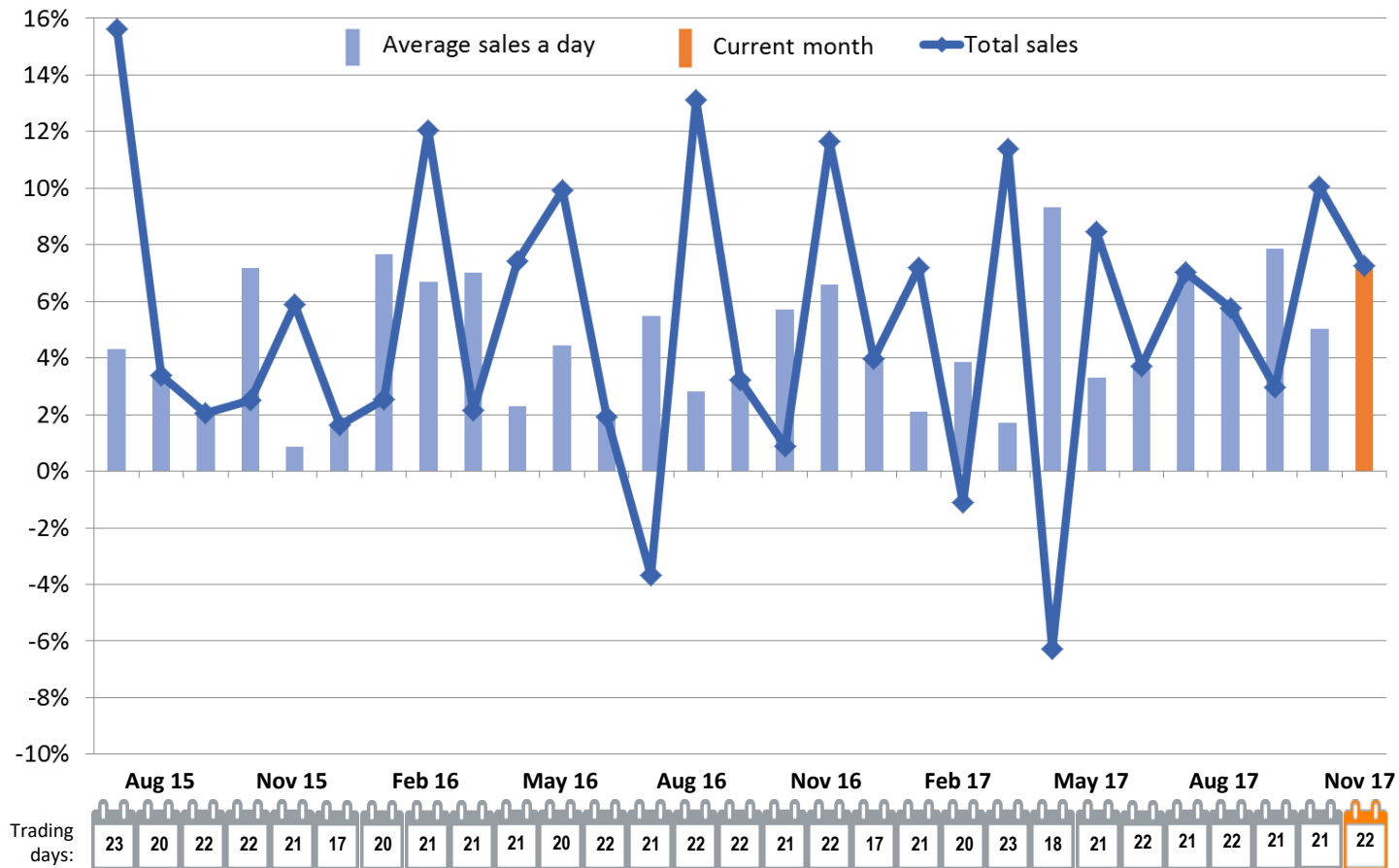


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2017

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year

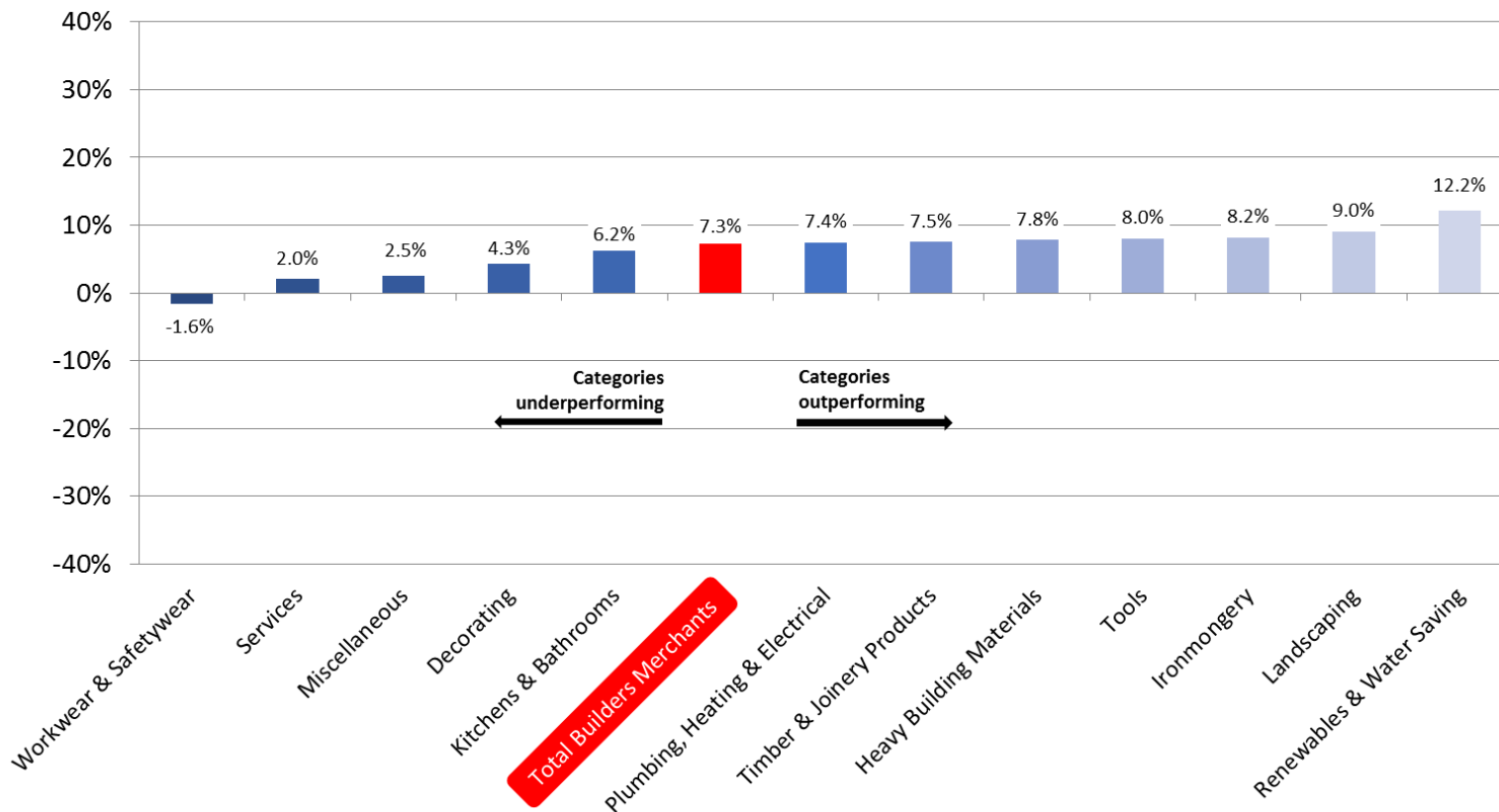


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2017

# Monthly: This Year v Last Year

## November 2017 sales indices

### November 2017 index v November 2016 index

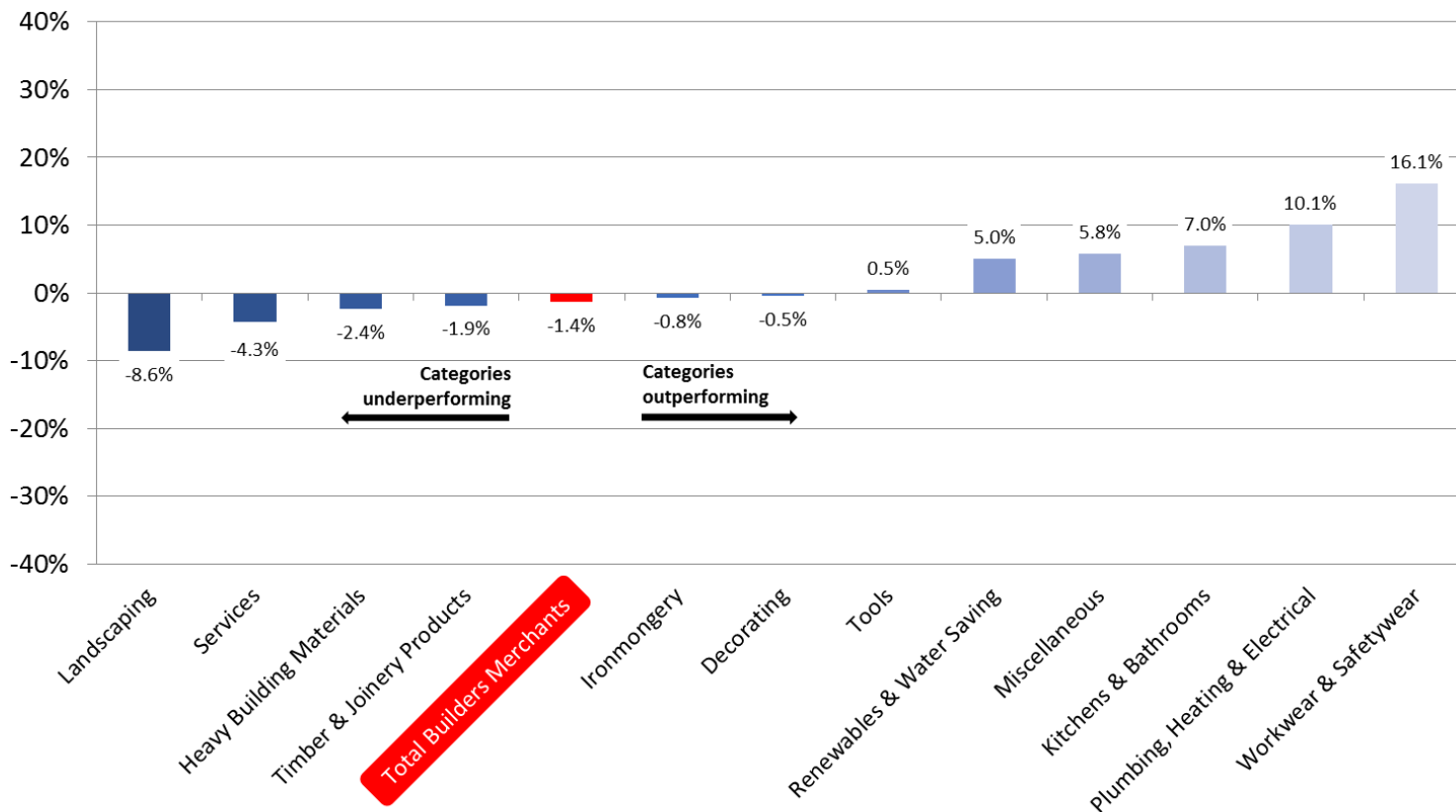


**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2017

# Monthly: This Month v Last Month

## November 2017 sales indices

### November 2017 index v October 2017 index



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

# Quarterly: Index and Categories

## Quarter 3 2016\* to Quarter 3 2017

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q3 2016	Q4 2016	Q1 2017	Q2 2017	Q3 2017
<b>Total Builders Merchants</b>	<b>100</b>	<b>112.9</b>	<b>100.9</b>	<b>106.0</b>	<b>116.0</b>	<b>119.1</b>
Timber & Joinery Products	100	111.1	100.7	107.1	112.3	117.1
Heavy Building Materials	100	113.6	101.4	105.7	116.9	120.7
Decorating	100	110.0	98.2	101.8	107.2	113.9
Tools	100	102.8	97.3	106.7	104.7	109.8
Workwear & Safetywear	100	99.4	105.5	108.8	95.3	100.9
Ironmongery	100	115.5	107.4	115.3	117.9	125.3
Landscaping	100	127.0	89.8	96.1	146.0	130.4
Plumbing, Heating & Electrical	100	105.3	113.9	119.9	106.0	113.4
Renewables & Water Saving	100	66.5	59.0	78.2	69.4	69.0
Kitchens & Bathrooms	100	106.1	104.7	110.6	109.6	115.2
Miscellaneous	100	115.1	109.4	115.5	112.5	120.5
Services	100	113.9	98.9	99.3	107.6	112.4

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

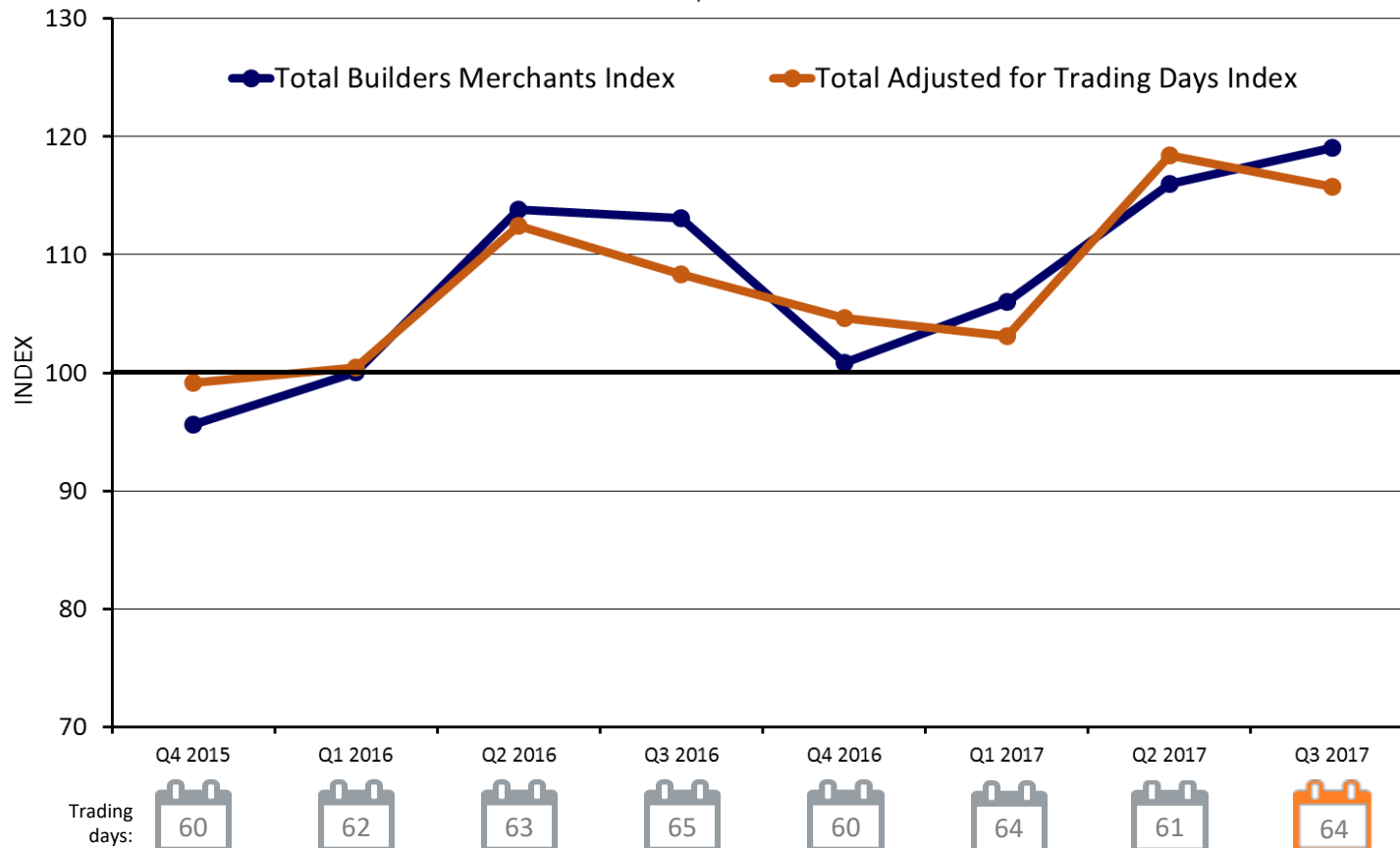
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2017

# 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



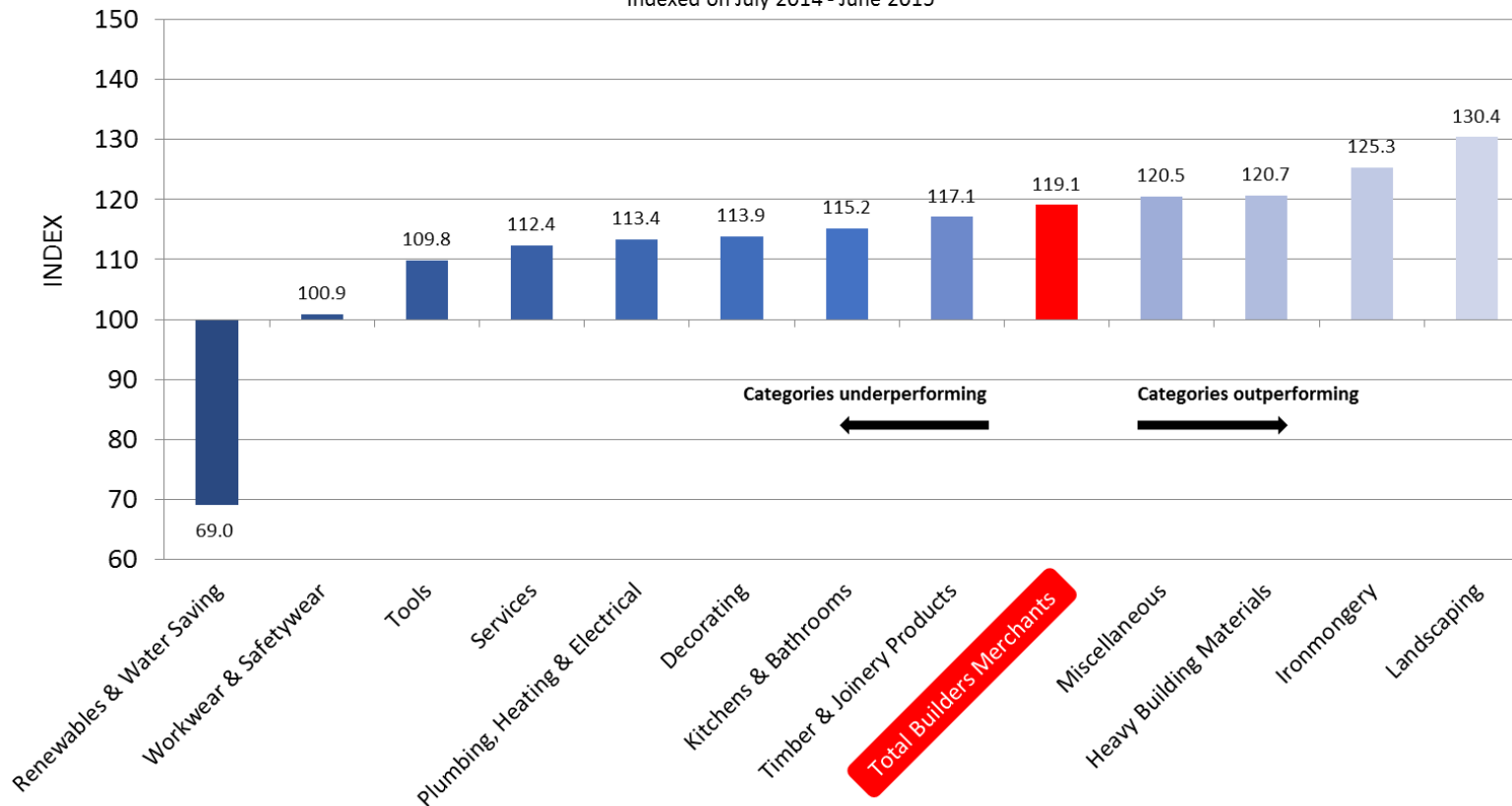
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2017

# Quarterly: Index and Categories

## Q3 2017 index

### Quarter 3 2017

Indexed on July 2014 - June 2015



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



# Quarterly: Index and Categories

## Q3 2017 index

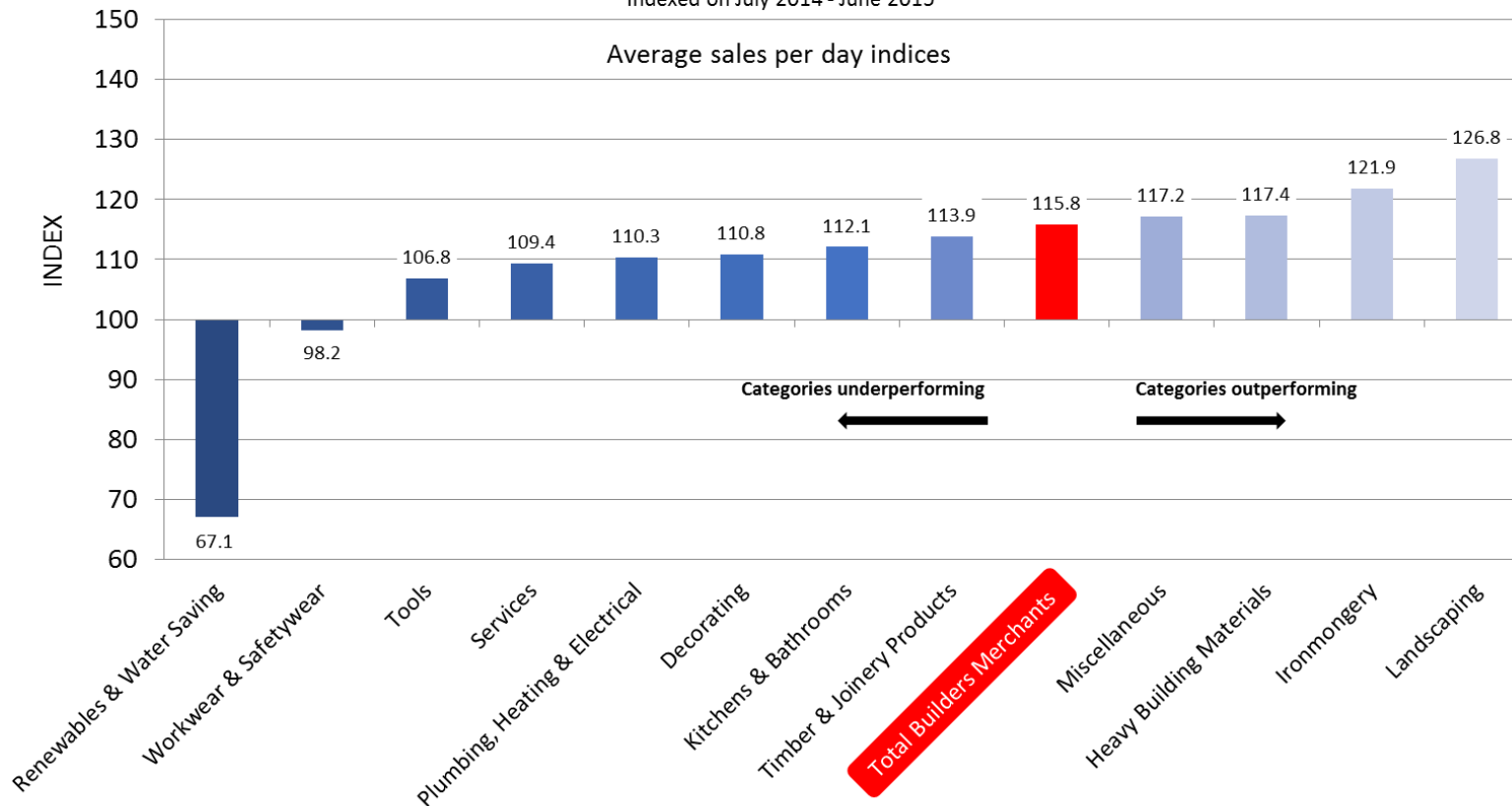
### average sales per day



## Quarter 3 2017

Indexed on July 2014 - June 2015

Average sales per day indices



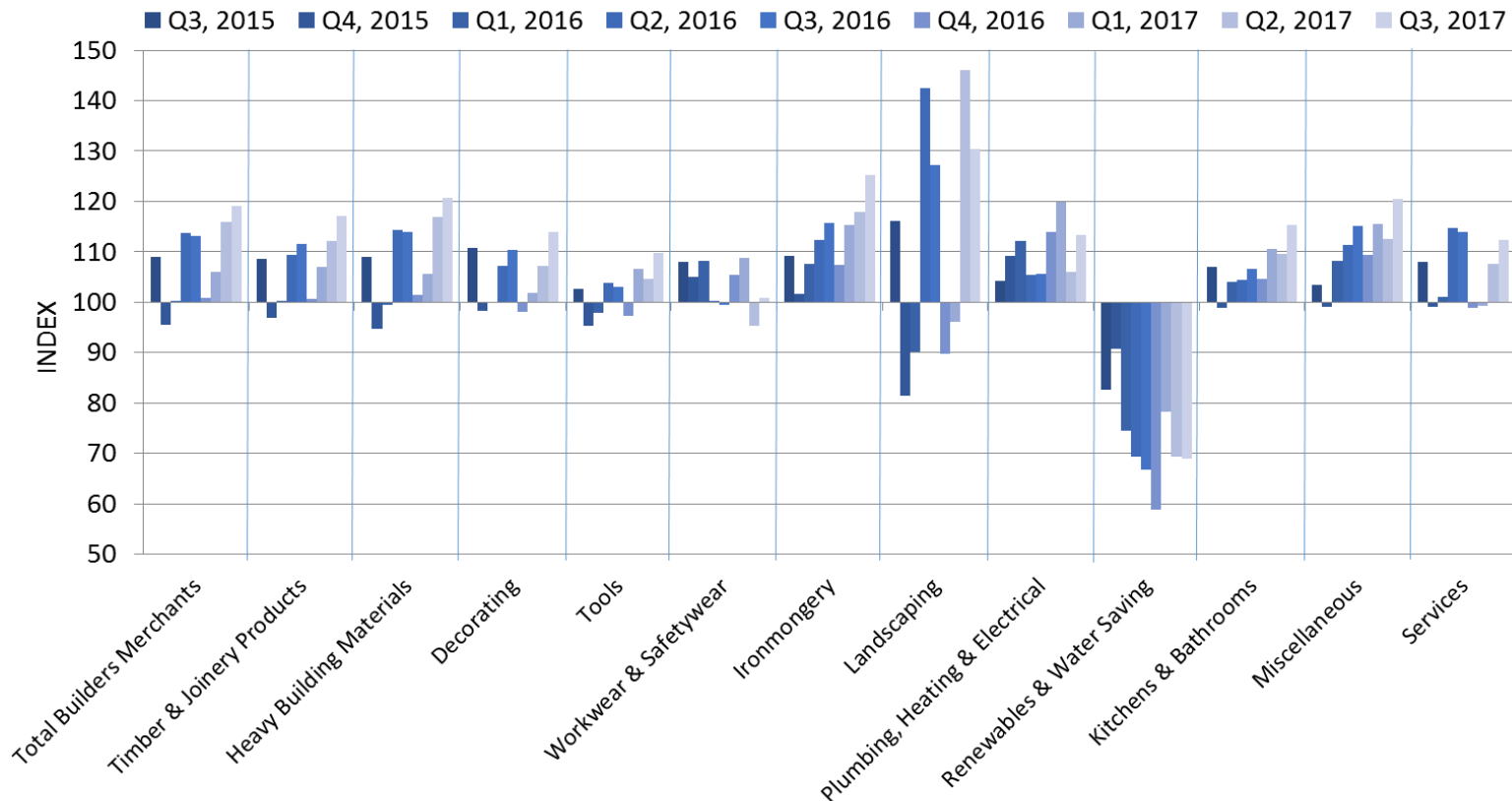
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2017

# Quarterly: Index and Categories

## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

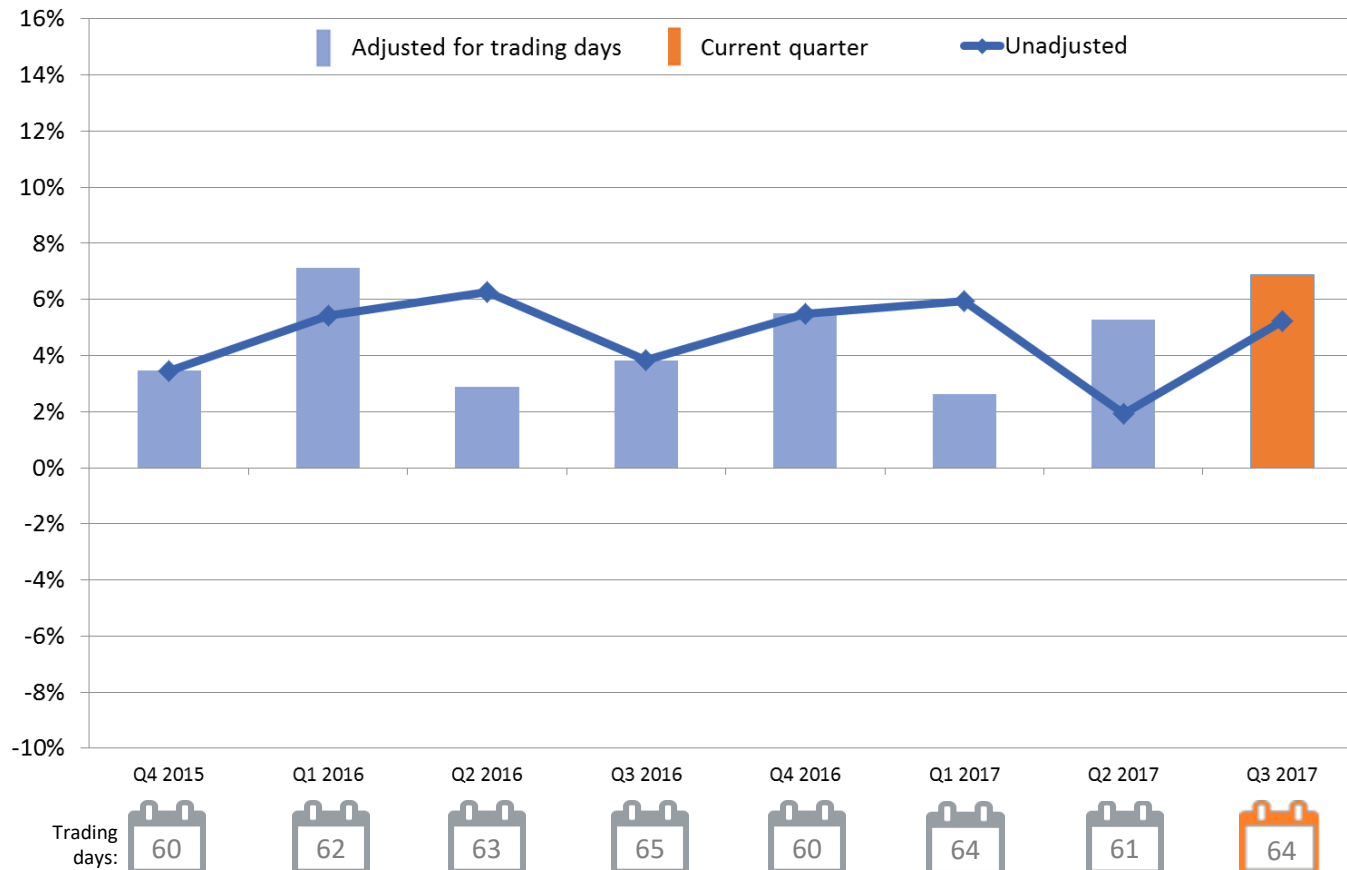


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2017

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

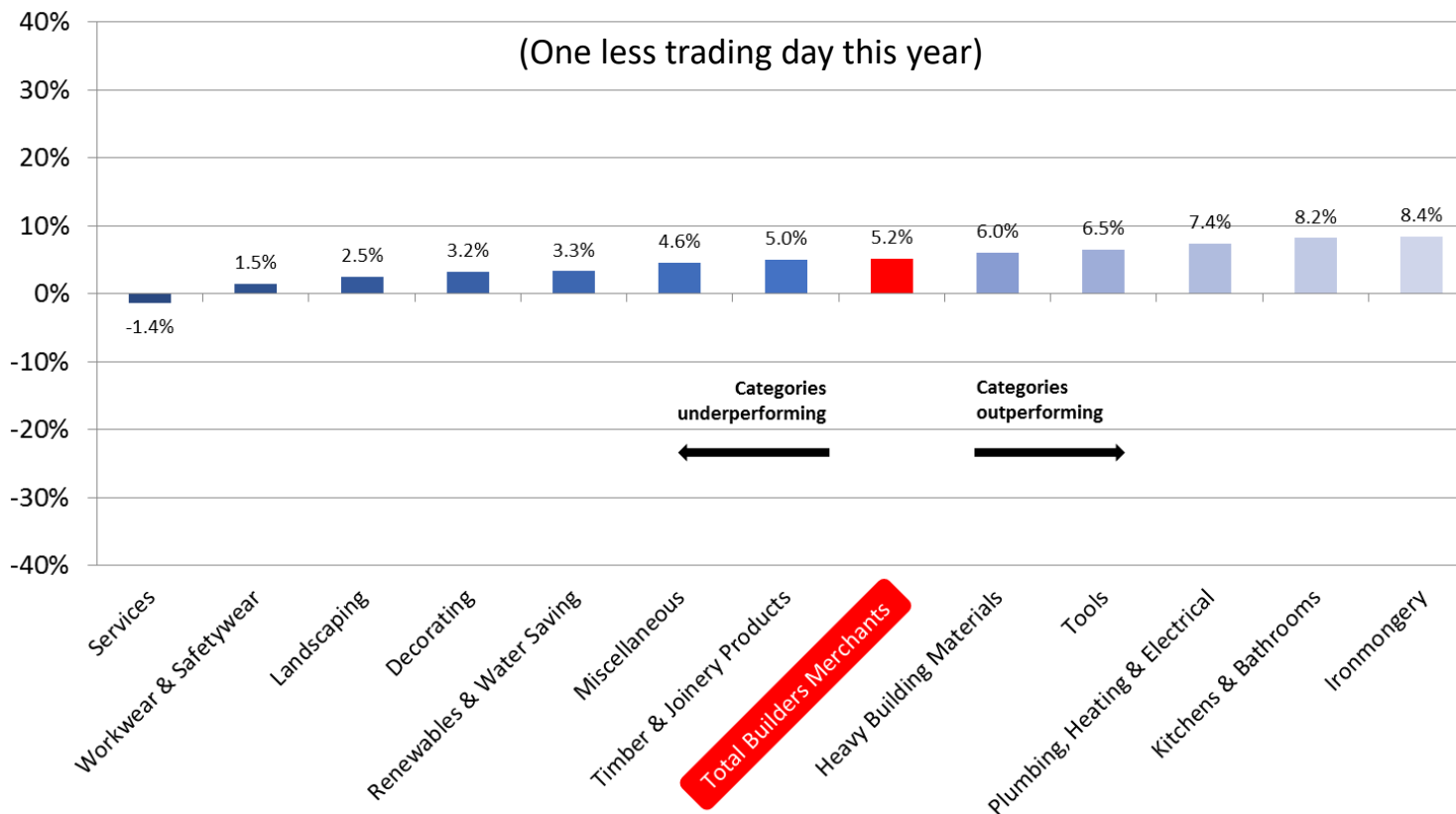


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2017

# Quarterly: This Year v Last Year

## Q3 2017 sales indices

### Quarter 3 2017 index v Quarter 3 2016 index

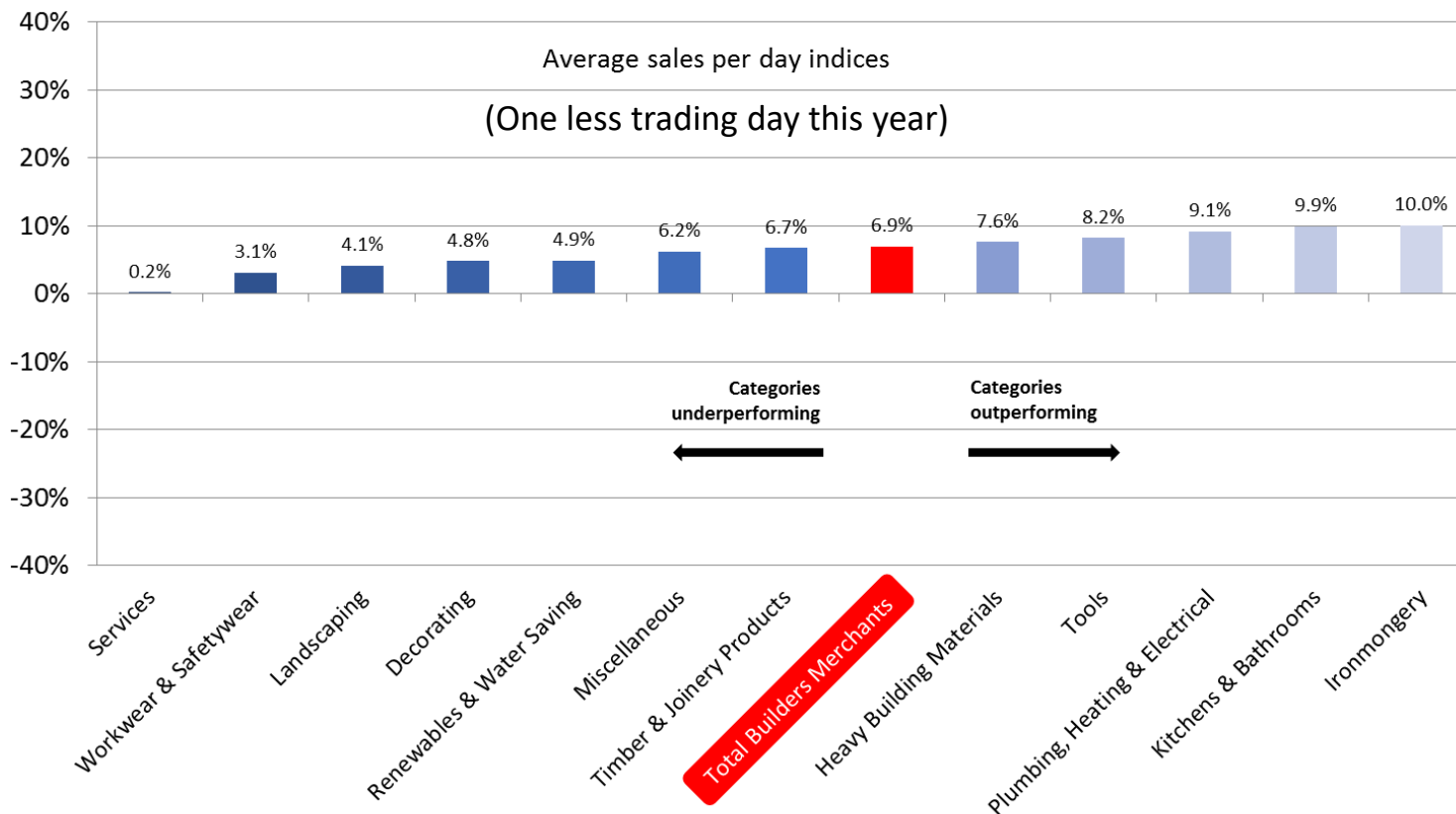


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2017

# Quarterly: This Year v Last Year

## Q3 2017 average sales per day indices

### Quarter 3 2017 index v Quarter 3 2016 index

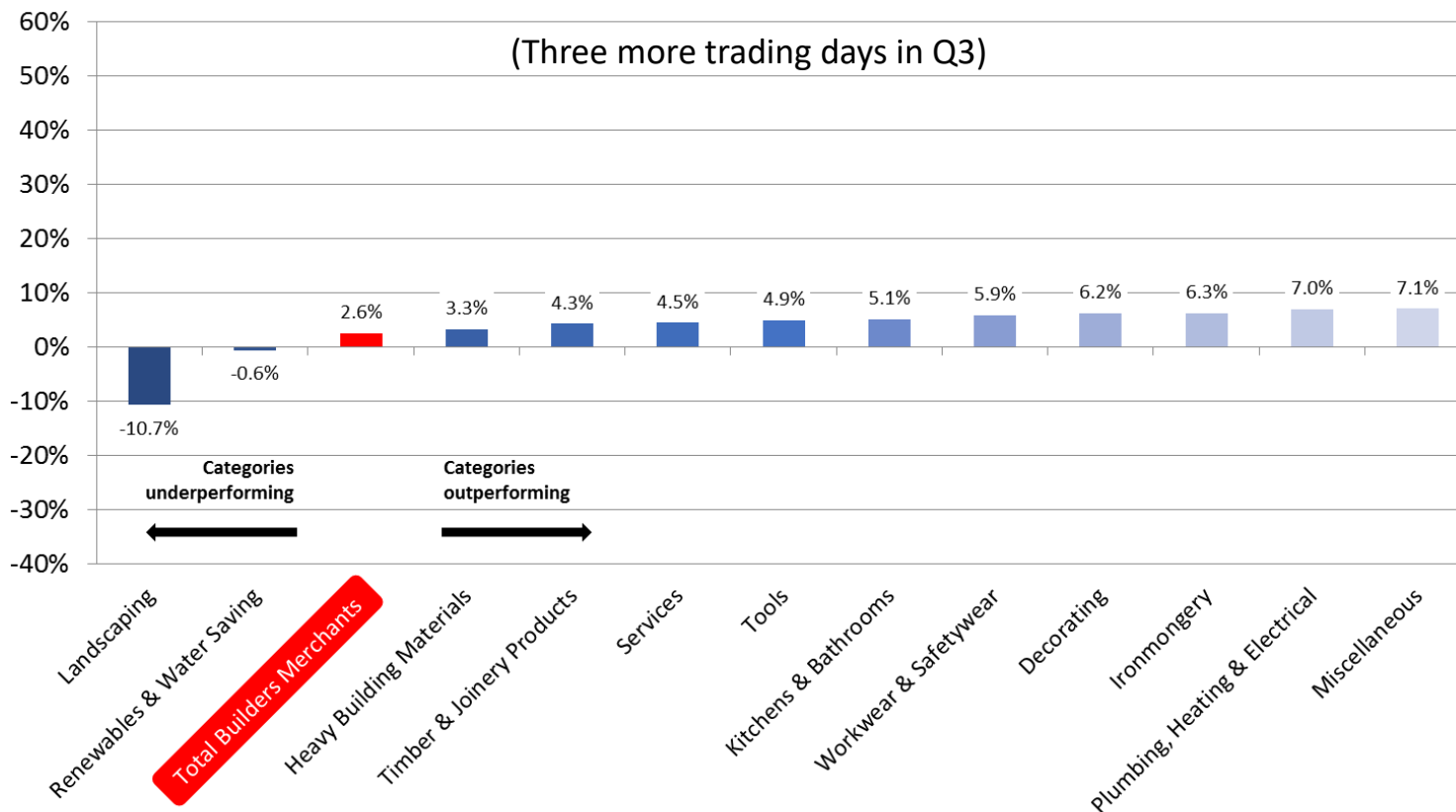


 Source: GfK's Builders Merchants Total Category Report July 2015 to September 2017

# Quarterly: Quarter on Quarter

## Q3 2017 sales indices

### Quarter 3 2017 index v Quarter 2 2017 index

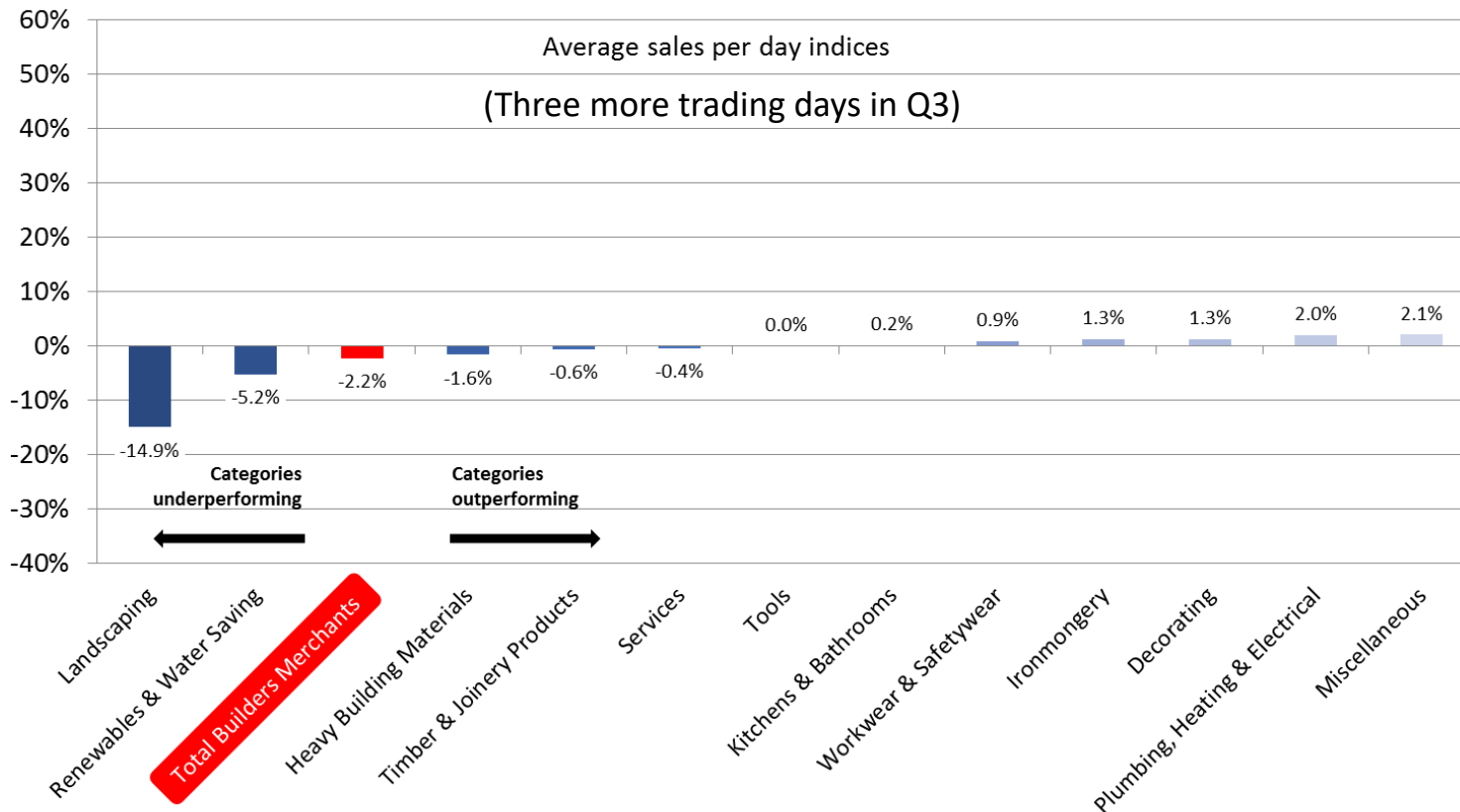


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2017

# Quarterly: Quarter on Quarter

## Q3 2017 average sales per day indices

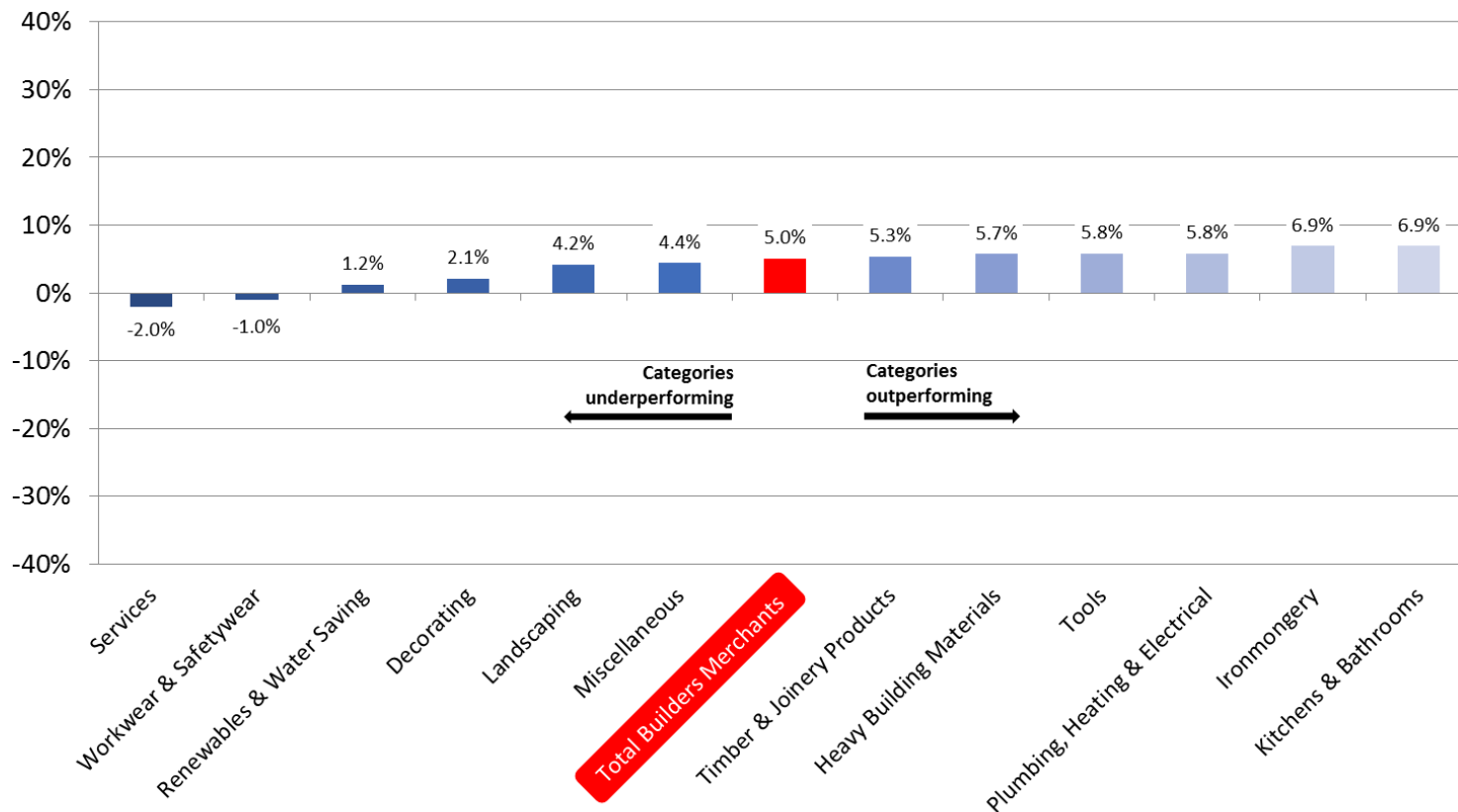
### Quarter 3 2017 index v Quarter 2 2017 index



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

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

## 12 months Dec 16 to Nov 17 v 12 months Dec 15 to Nov 16



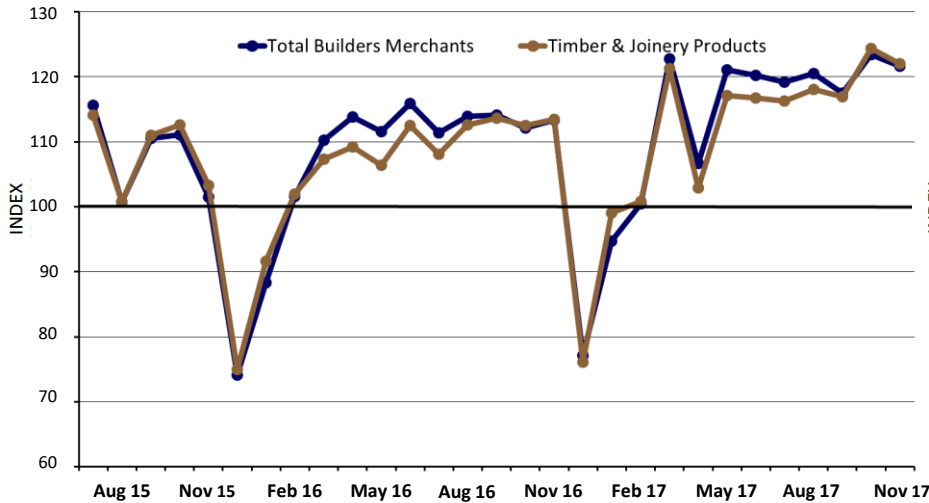
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2017



# Monthly: Indices

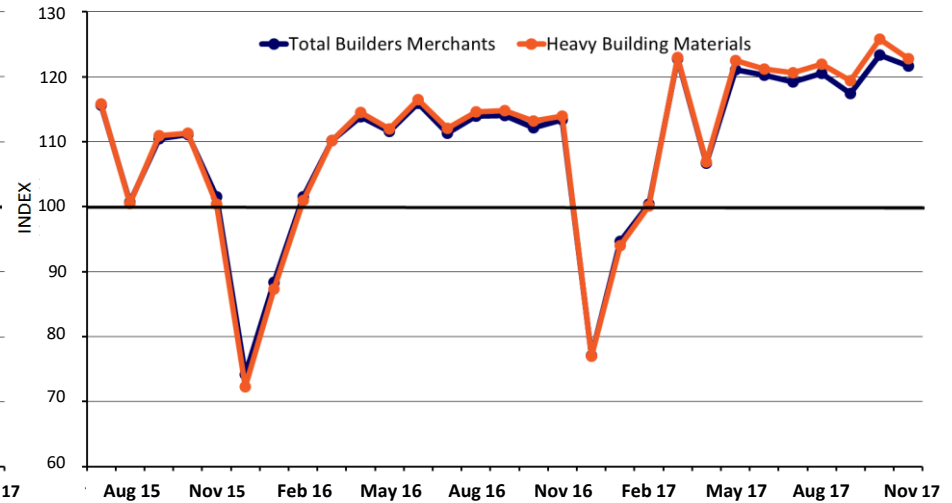
## November 2017

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



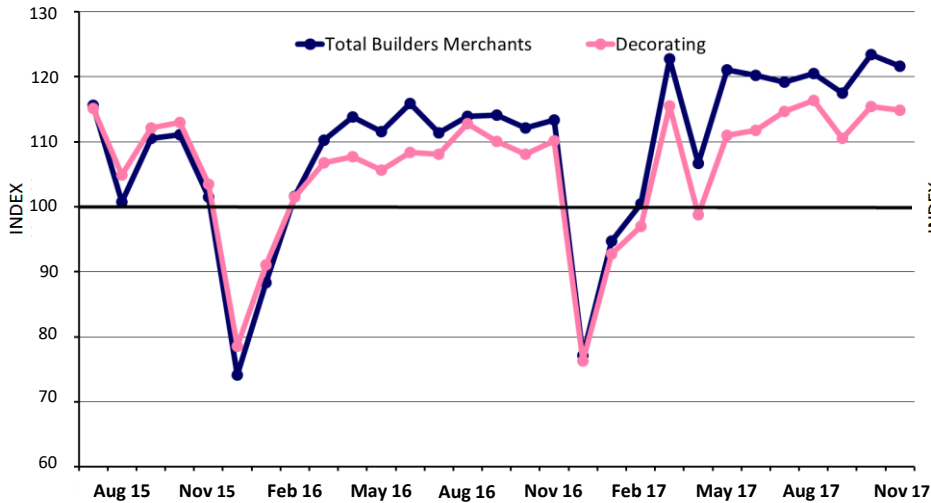
Indexed on July 2014 – June 2015

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

# Monthly: Indices

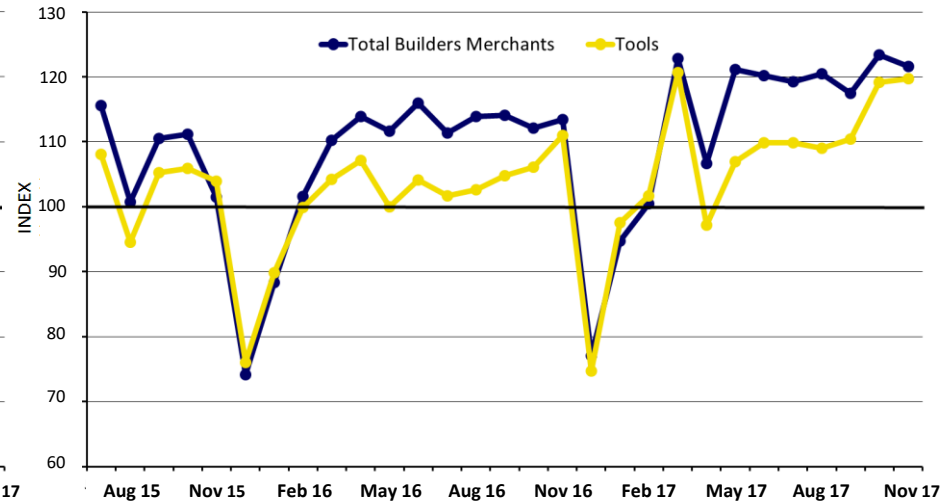
## November 2017

### Decorating



Indexed on July 2014 – June 2015

### Tools



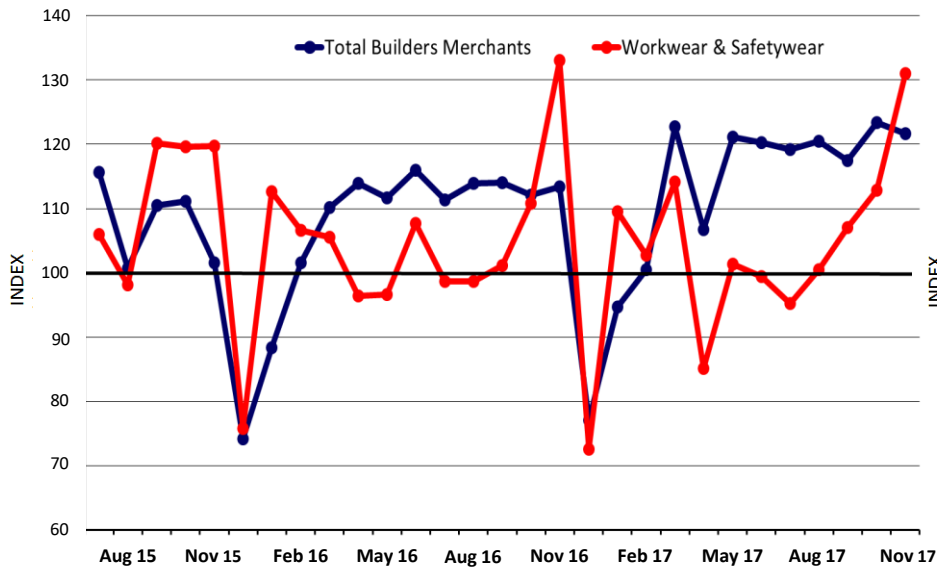
Indexed on July 2014 – June 2015

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

# Monthly: Indices

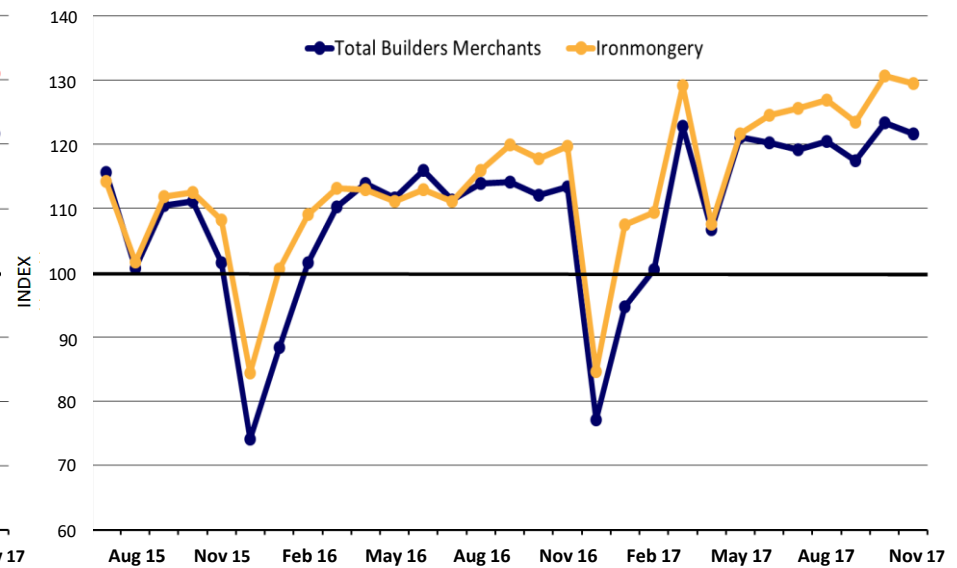
## November 2017

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



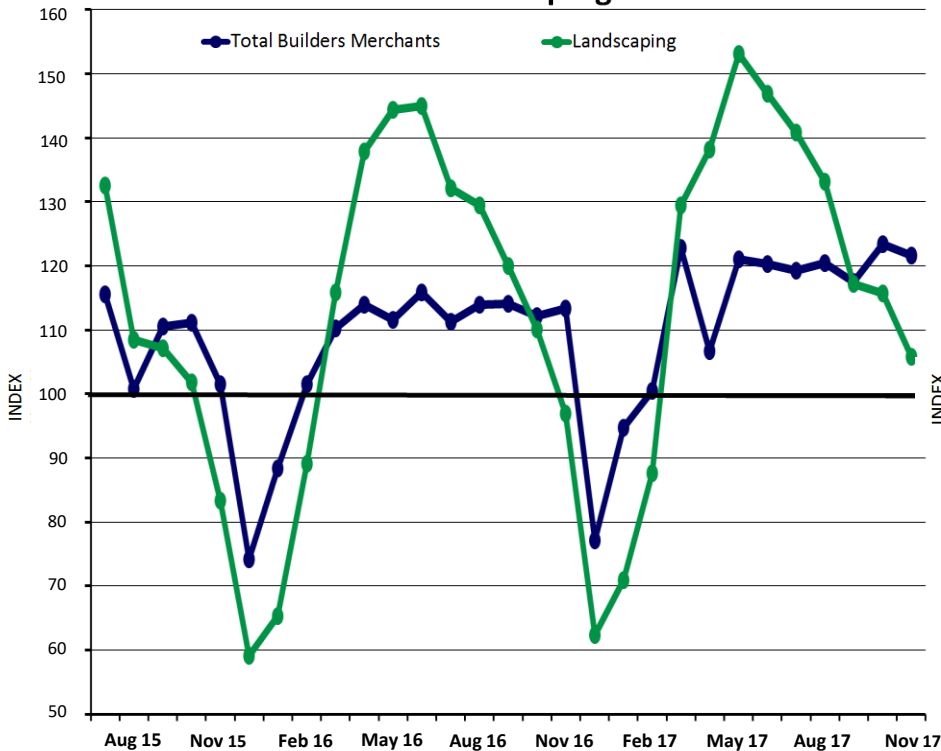
Indexed on July 2014 – June 2015

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

# Monthly: Indices

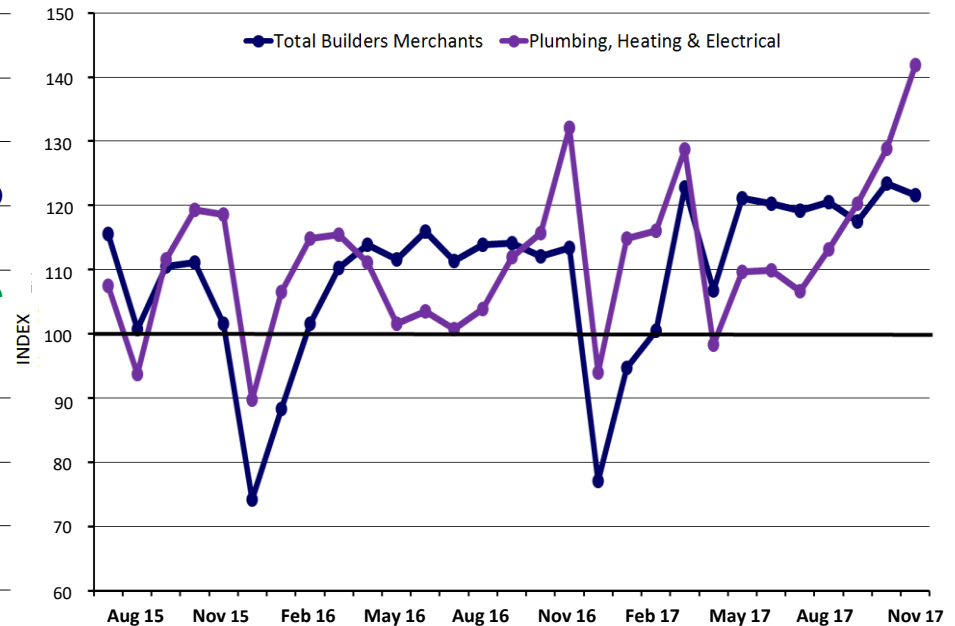
## November 2017

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical

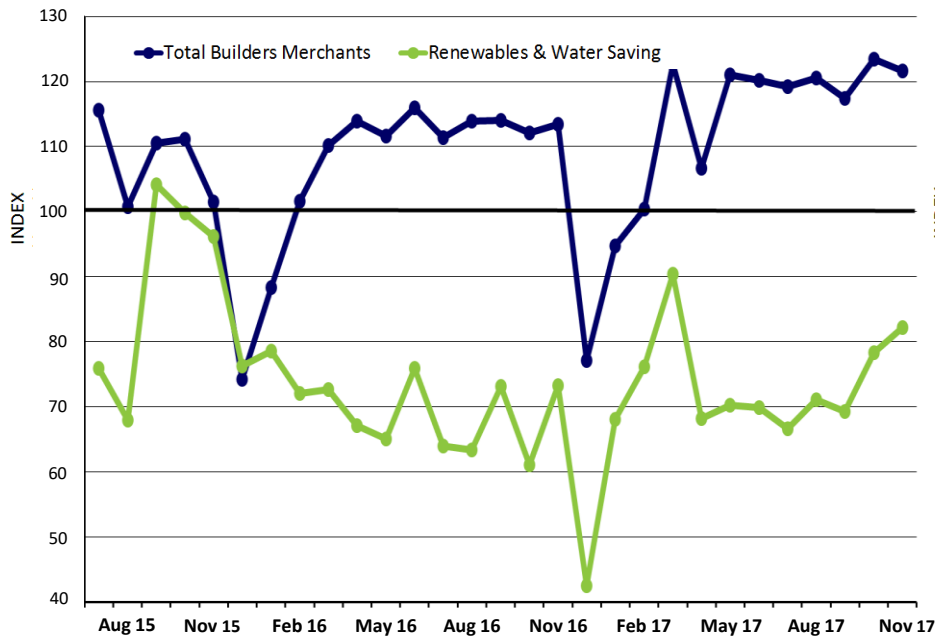


Indexed on July 2014 – June 2015

# Monthly: Indices

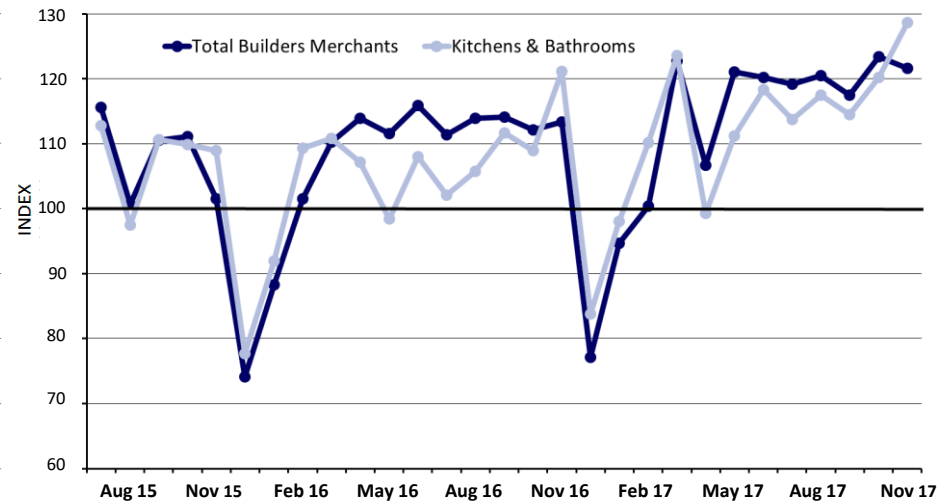
## November 2017

### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms



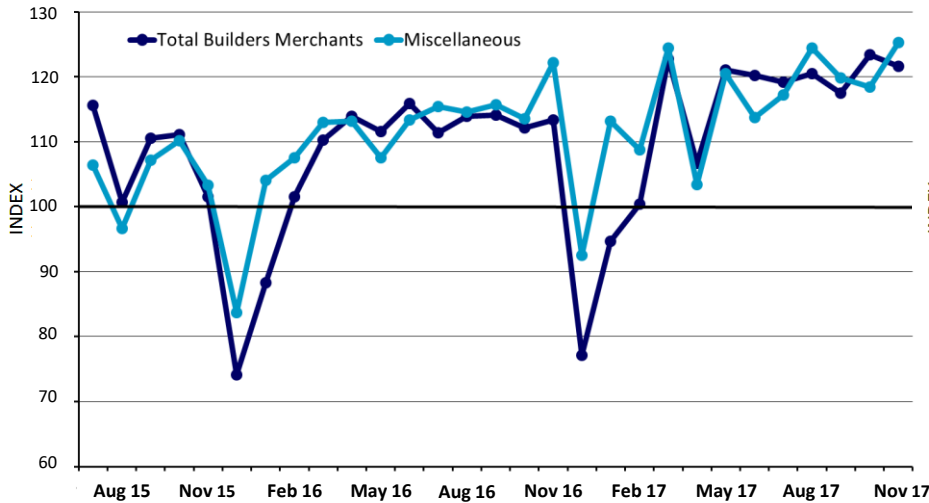
Indexed on July 2014 – June 2015

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

# Monthly: Indices

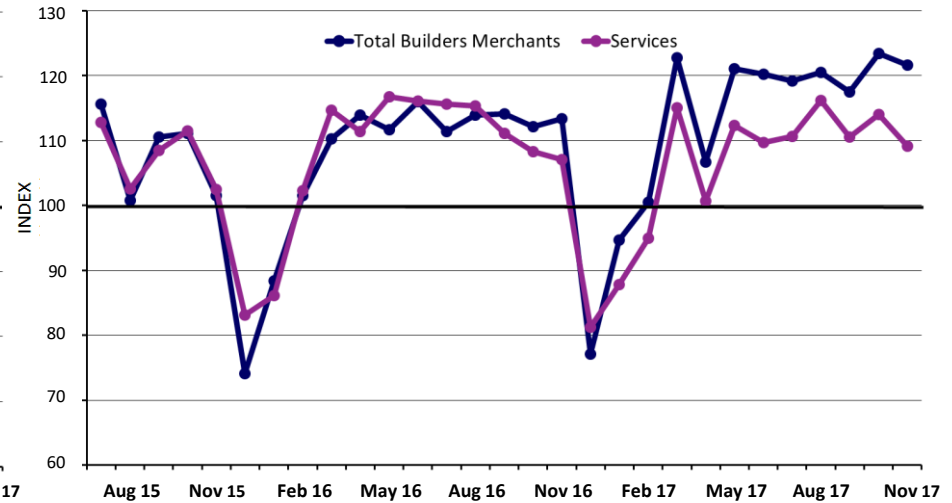
## November 2017

### Miscellaneous



Indexed on July 2014 – June 2015

### Services



Indexed on July 2014 – June 2015

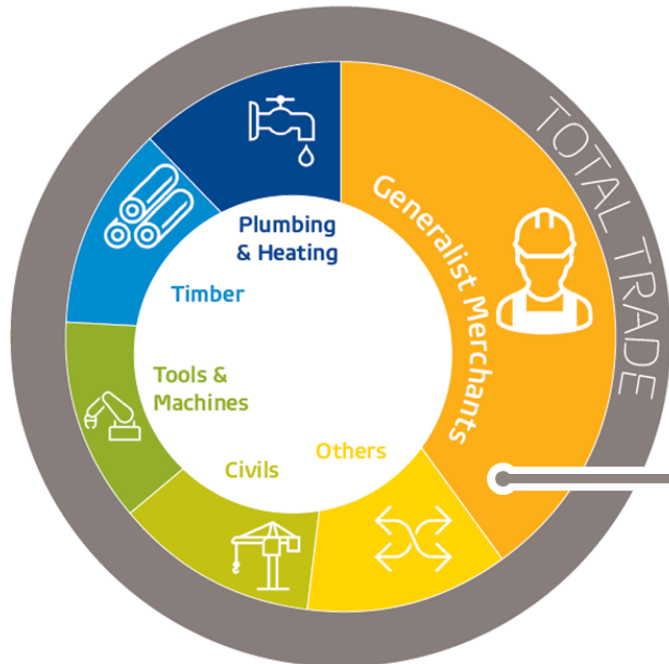
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2017

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

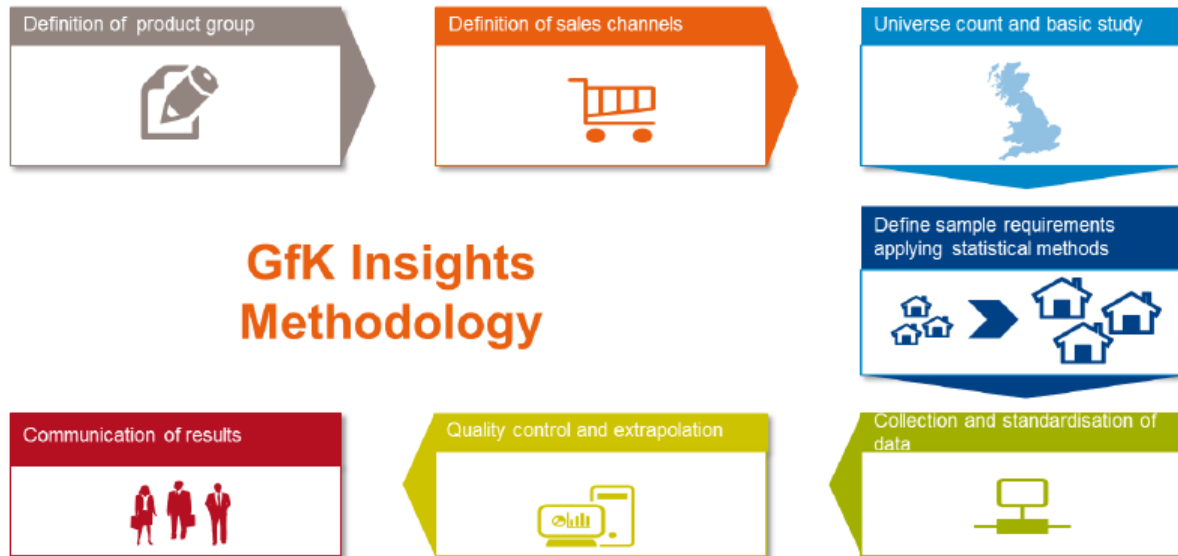
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

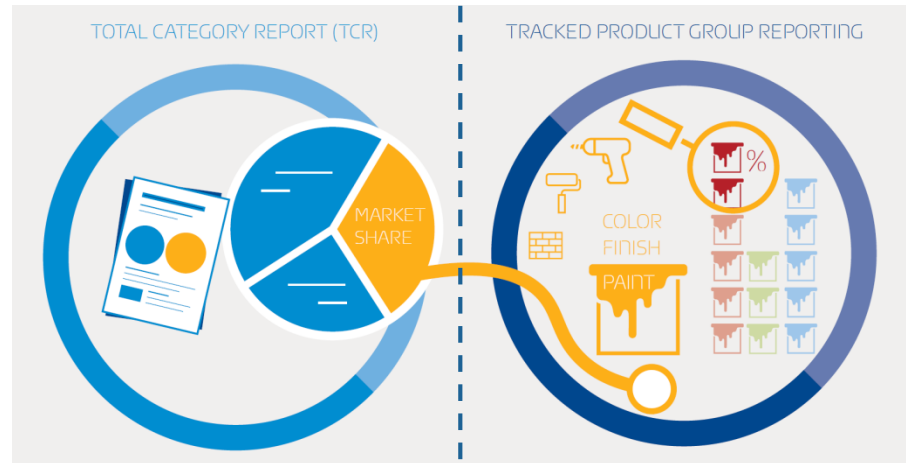
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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



**Richard Frankcom**

Senior Client Insight  
Manager - Trade Panel

[richard.frankcom@gfk.com](mailto:richard.frankcom@gfk.com)

+44 (0) 20 7890 9543



**Peter Church**

Business Development Manager

[pete.church@gfk.com](mailto:pete.church@gfk.com)

tel +44 (0) 7342 056 050



**Richard Ellithorne**

BMF Member Services Director

[richard.ellithorne@bmf.org.uk](mailto:richard.ellithorne@bmf.org.uk)

+44 (0) 24 7685 4980



**Lucia Di Stazio**

Managing Director

[lucia@mra-marketing.com](mailto:lucia@mra-marketing.com)

+44 (0) 1453 521621



**Tom Rigby**

Business Development Manager

[tom@mra-marketing.com](mailto:tom@mra-marketing.com)

+44 (0) 7392 081276