

“one **industry**
one **voice**”

Builders Merchant Building Index



Monthly report for February 2018

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 Q4 report.

Monthly and Quarterly Indices
December 2017 and Q4 2017

Heavy Building Materials

Heavy Building Materials - Quarterly

Macro factors impacting Merchants

New house builds Quarterly

Expert Panel Cement & Aggregates
(Part of Heavy Building Materials)

GfK Insights

Insights at feature by brand level are available. Aid strategic and tactical decision making.

White Emulsion is 52% of Total Emulsion £76.5m p.a.
Blue Emulsion is 44% of Total Emulsion £67.5m p.a.
Red Emulsion is 4% of Total Emulsion £6.0m p.a.

White Emulsion is 54% of White Emulsion £3.0m p.a.

Blue Emulsion is 46% of White Emulsion £2.5m p.a.

Red Emulsion is 0% of White Emulsion £0.0m p.a.

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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, Heatrae Sadia and Dulux Trade, who provide valuable commentary on market trends and influences. Meet the BMBI Experts on pages 7 and 8.

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 Richard Frankcom at richard.frankcom@gfk.com.

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

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

Overview

Merchants up in February

Year on Year

Total Builders' merchant value sales were up 4.0% in February compared with February last year. Five categories did better: Plumbing Heating & Electrical (+7.9%), Timber & Joinery Products (+6.6%), Ironmongery (+5.0%), Kitchens & Bathrooms (+4.6%) and Workwear & Safetywear (+4.5%). Six categories grew more slowly, including Heavy Building Materials (+3.2%) the largest category. Only Tools sold less (-1.6%).

Month on month

Overall sales in February were 1.8% higher than January. Four categories were stronger, including Landscaping (+8.2%) and Kitchens & Bathrooms (+6.5%).

Average sales a day in February (which takes trading account of two fewer trading days) were up 12.0% compared with January. Landscaping (+19.1%), Kitchens & Bathrooms (+17.1%) and Heavy Building Materials (+13.1%) did better. All categories out-performed January.

Other periods

The first two months of 2018 were 6.1% up on January and February 2017. Plumbing Heating & Electrical (+9.3%) did best, with Ironmongery (+8.5%) also performing well. With one more trading day this year, average sales a day in January and February were up 3.6% year on year.

The latest three months (December 2017 to February 2018) were 4.2% up on the same three months a year ago. Workwear & Safetywear (+9.1%) did best. Heavy Building Materials (+2.9%) grew more slowly.

The rolling 12 months March 2017 to February 2018 were 5.3% above the same period a year earlier.

Index

February's BMBI index was 104.5, with one additional trading day. Seasonal category Plumbing Heating & Electrical was top (125.2) followed by Kitchens & Bathrooms (115.2). Nine of the 12 categories exceeded 100.

Total Builders' merchant value sales were up 4.0% in February compared with February last year.

Average sales a day were up 12.0% compared with January.

The Expert Panel

Speaking for their markets - 1



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 Q4 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



Expert for PVC-U Windows & Doors

[Read latest Comment: Q4 2017 Report](#)



Steve Durdant-Hollamby
Managing Director
Alumasc Water Management Systems



Expert for Civils, Metal Rainwater & Drainage

[Read latest Comment: Q4 2017 Report](#)



John Duffin
Managing Director
Keylite Roof Windows



Expert for Roof Windows

[Read latest Comment: Q4 2017 Report](#)



Andrew Simpson
National Commercial Director
Hanson Cement



Expert for Cement & Aggregates

[Read latest Comment: Q4 2017 Report](#)



Nigel Cox
Managing Director
Timbmet



Expert for Timber & Panel Products

[Read latest Comment: Q4 2017 Report](#)



Andy Williamson
Group Managing Director
IKO PLC



Expert for Roofing Products

[Read latest Comment: Q4 2017 Report](#)

The Expert Panel

Speaking for their markets - 2



Derrick McFarland
Managing Director
Keystone Lintels

Expert for Steel Lintels



[Read latest Comment: Q4 2017 Report](#)



Tony France
Sales Director
Ibstock

Expert for Bricks



[Read latest Comment: Q4 2017 Report](#)



John Sinfield
Managing Director
Knauf Insulation

Expert for Mineral Wool Insulation



[Read latest Comment: Q4 2017 Report](#)



Paul Rivett
Managing Director
Heatrae Sadia

Expert for Water Heating



[Read latest Comment: Q4 2017 Report](#)



Mike Beard
Merchant Development Director
Encon Insulation

Expert for Insulation Products - Distribution



[Read latest Comment: Q4 2017 Report](#)



Malcolm Gough
Group Sales & Marketing Director
Natural Paving Products

Expert for Natural Stone Landscaping Products, Vitrified Paving & Artificial Grass



[Read latest Comment: Q4 2017 Report](#)

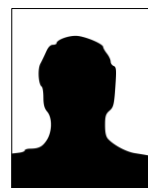


Paul Roughan
Trade Merchants Sales Director
Dulux Trade

Expert for Paint



[Read latest Comment: Q4 2017 Report](#)



Additional experts will be joining the panel in 2018

[Click here to find out more about the BMBI Experts and their sectors](#)

Monthly: Index and Categories

February 2017* – February 2018

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



MONTHLY SALES VALUE INDEX	Index	2017											2018	
		Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Total Builders Merchants	100	100.5	122.8	106.7	121.1	120.2	119.2	120.2	117.5	123.4	121.6	76.7	102.6	104.5
Timber & Joinery Products	100	100.9	121.2	102.9	117.1	116.7	116.3	117.3	116.9	124.4	122.1	77.8	108.0	107.6
Heavy Building Materials	100	100.1	123.0	106.9	122.5	121.2	120.6	121.6	119.4	125.8	122.8	75.2	100.5	103.3
Decorating	100	97.0	115.6	98.8	111.0	111.8	114.6	115.6	110.5	115.4	114.9	76.6	101.9	100.8
Tools	100	101.7	120.7	97.2	107.0	109.9	109.8	110.8	110.4	119.2	119.8	75.3	101.3	100.0
Workwear & Safetywear	100	102.7	114.1	85.1	101.4	99.4	95.2	96.2	107.0	112.9	131.0	86.1	117.2	107.3
Ironmongery	100	109.4	129.2	107.5	121.6	124.5	125.6	126.6	123.4	130.6	129.5	85.5	120.4	114.8
Landscaping	100	87.7	129.5	138.1	153.1	146.9	140.8	141.8	117.1	115.8	105.8	60.0	81.3	88.0
Plumbing, Heating & Electrical	100	116.1	128.7	98.3	109.7	110.0	106.6	107.6	120.3	128.9	141.9	97.4	127.2	125.2
Renewables & Water Saving	100	76.2	90.3	68.2	70.2	69.9	66.6	67.6	69.2	78.3	82.2	46.8	75.2	76.3
Kitchens & Bathrooms	100	110.2	123.6	99.3	111.3	118.3	113.7	114.7	114.5	120.2	128.6	85.9	108.2	115.2
Miscellaneous	100	108.8	124.4	103.4	120.5	113.7	117.2	118.2	119.8	118.4	125.3	90.7	114.4	113.2
Services	100	95.0	115.0	100.6	112.4	109.7	110.6	111.6	110.6	114.0	109.2	79.0	93.1	96.4

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

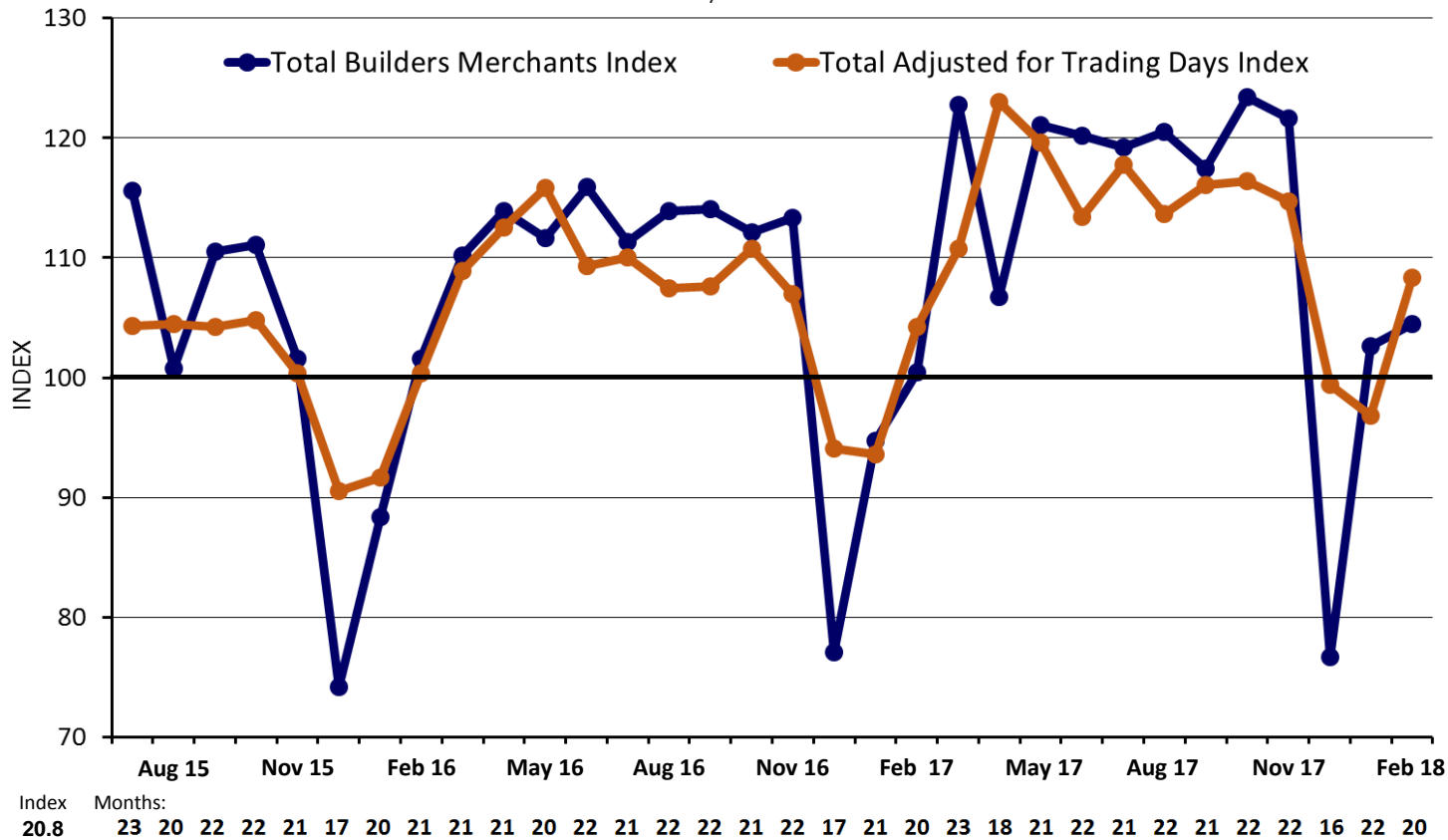
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

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



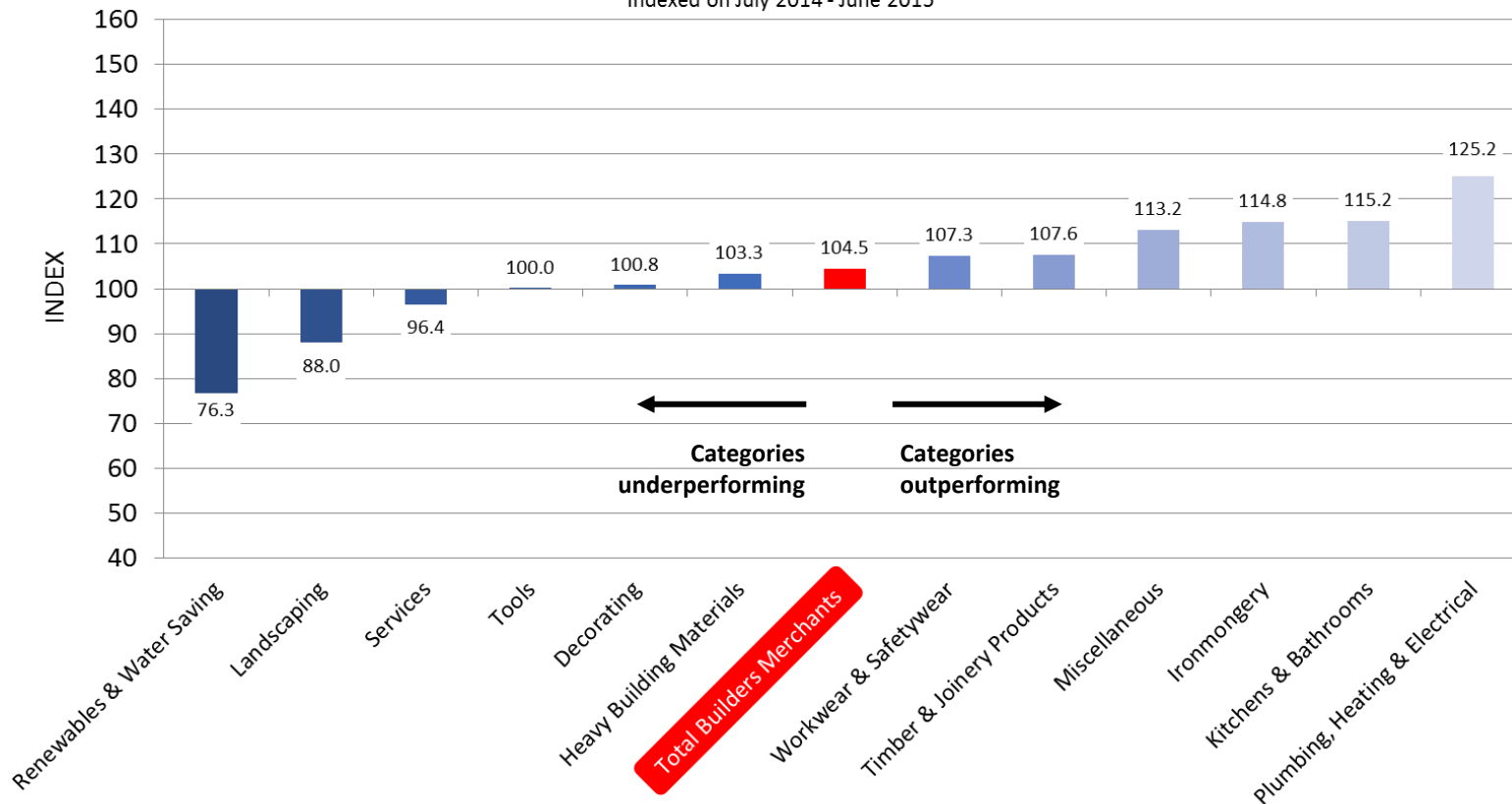
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Index and Categories

February 2018 index

February 2018 Index

Indexed on July 2014 - June 2015

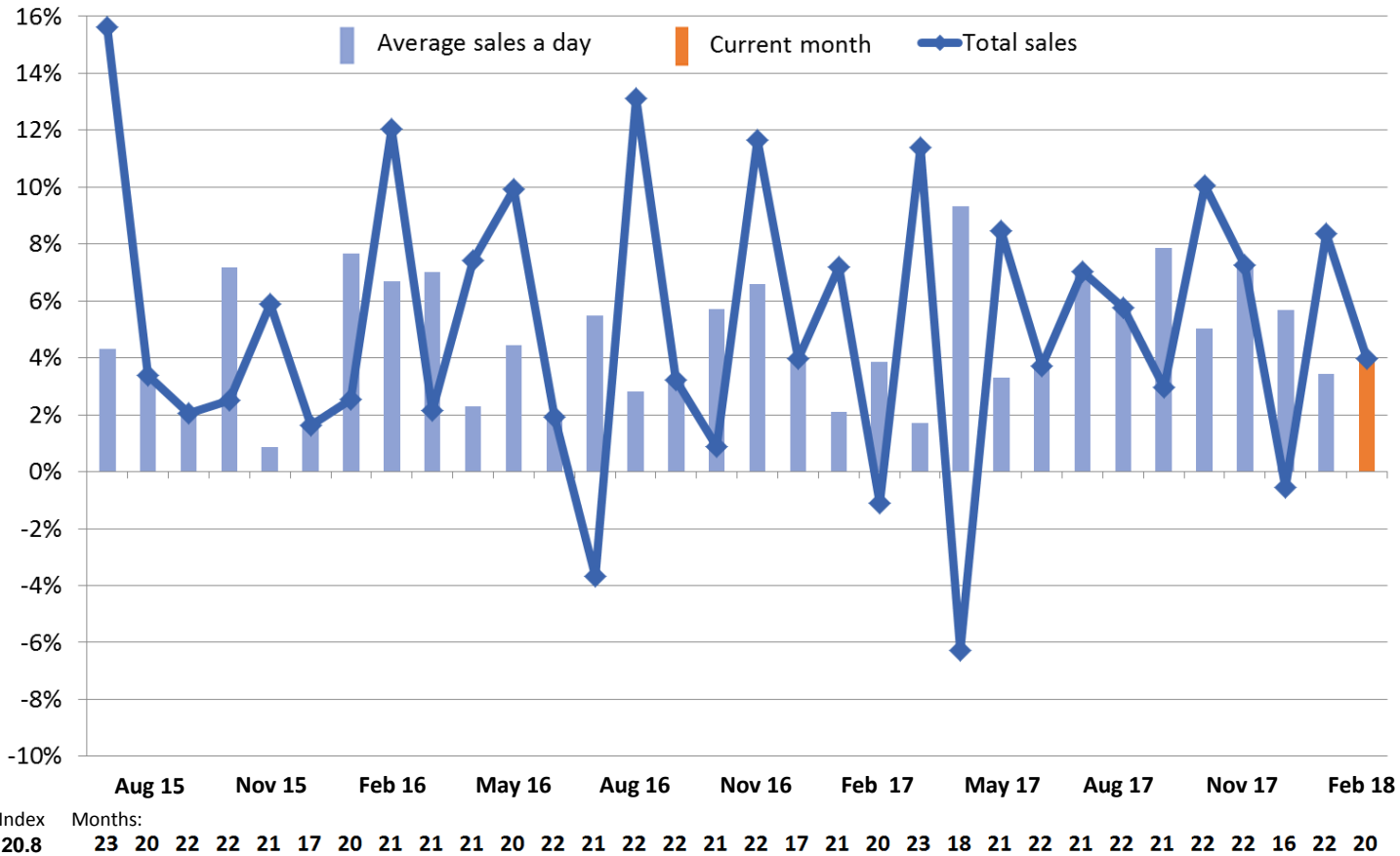


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Sales Indices

Adjusted and unadjusted for trading days

Monthly: Year on Year

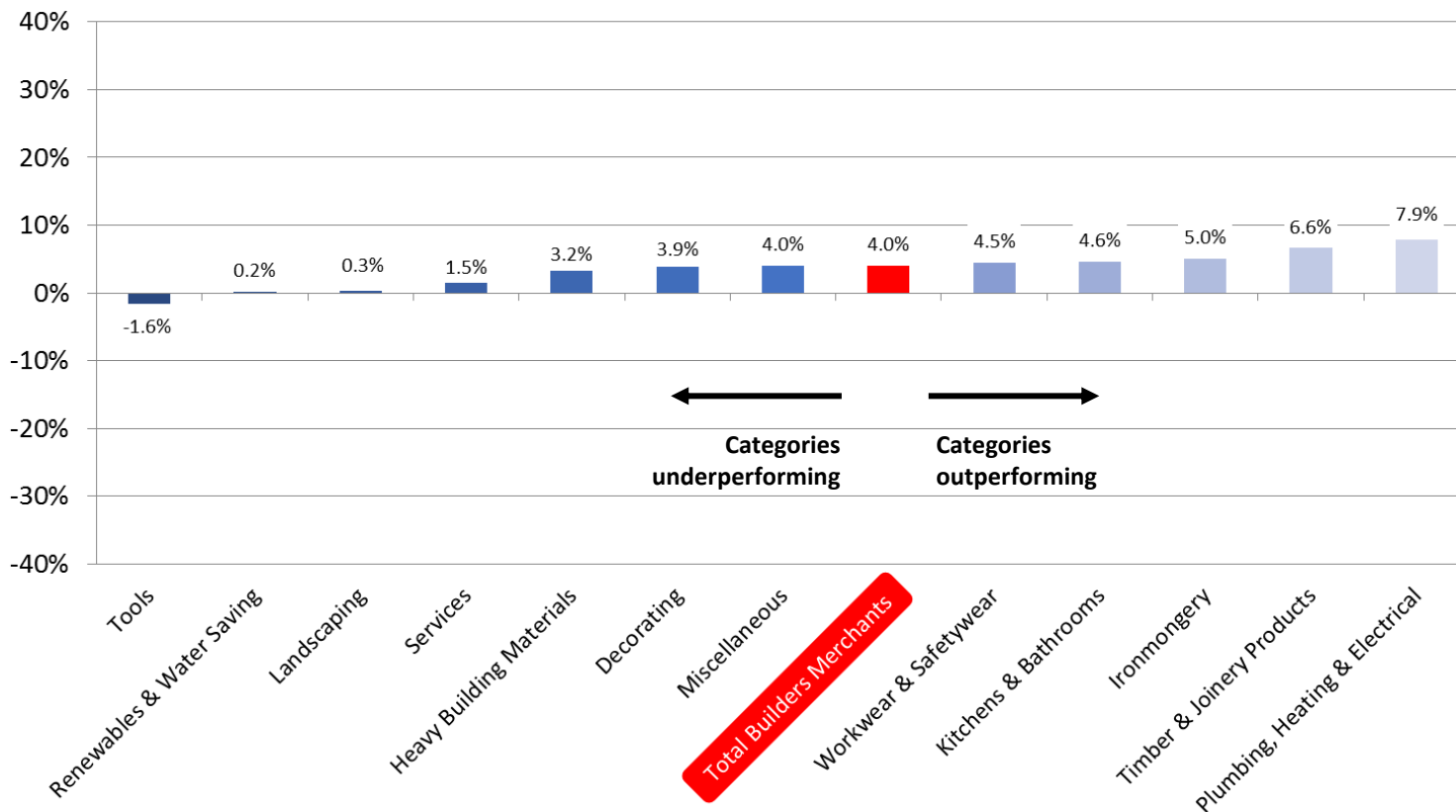


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: This Year v Last Year

February 2018 sales indices

February 2018 index v February 2017 index



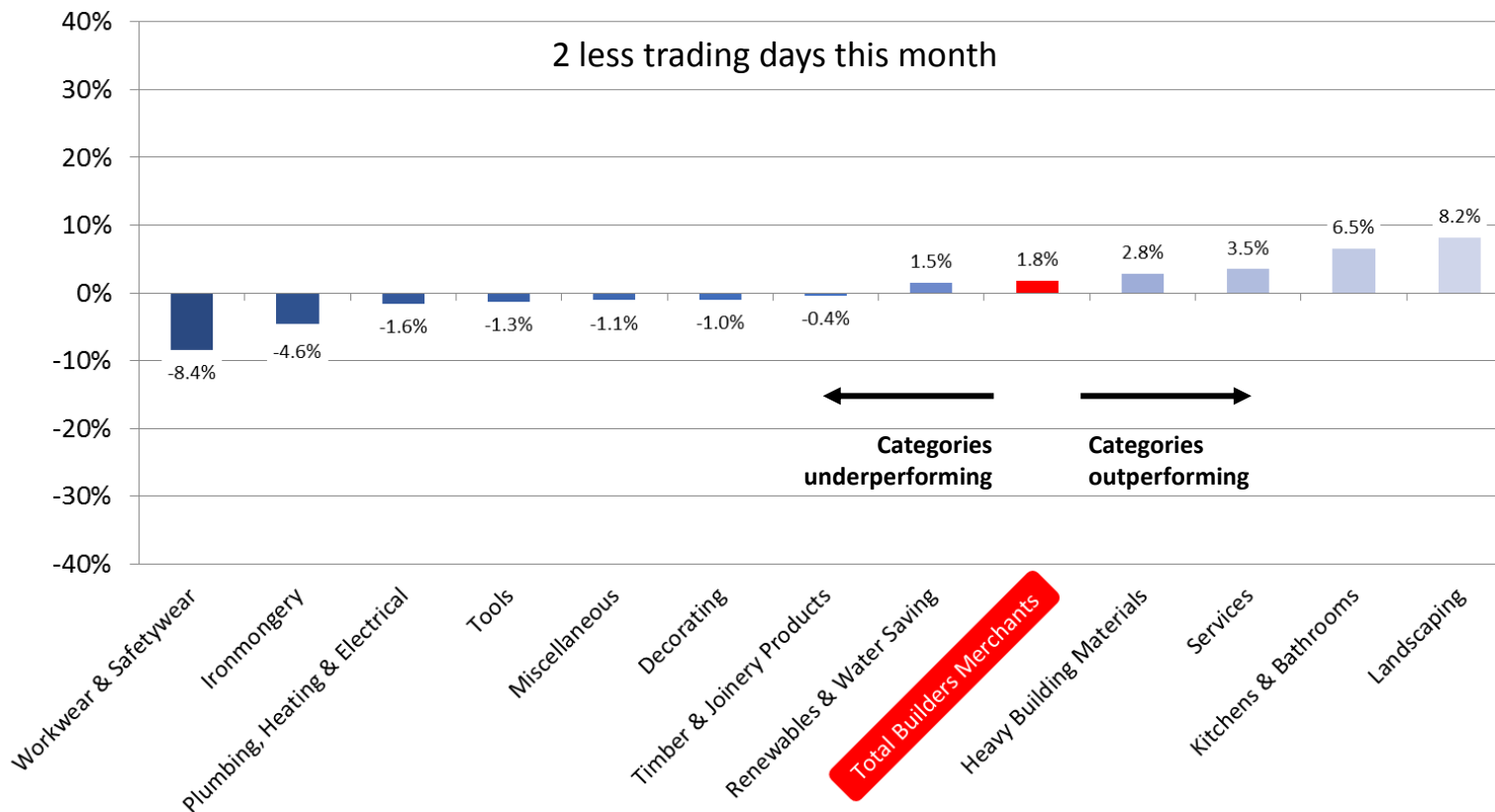
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: This Month v Last Month

February 2018 sales indices

February 2018 index v January 2018 index

2 less trading days this month



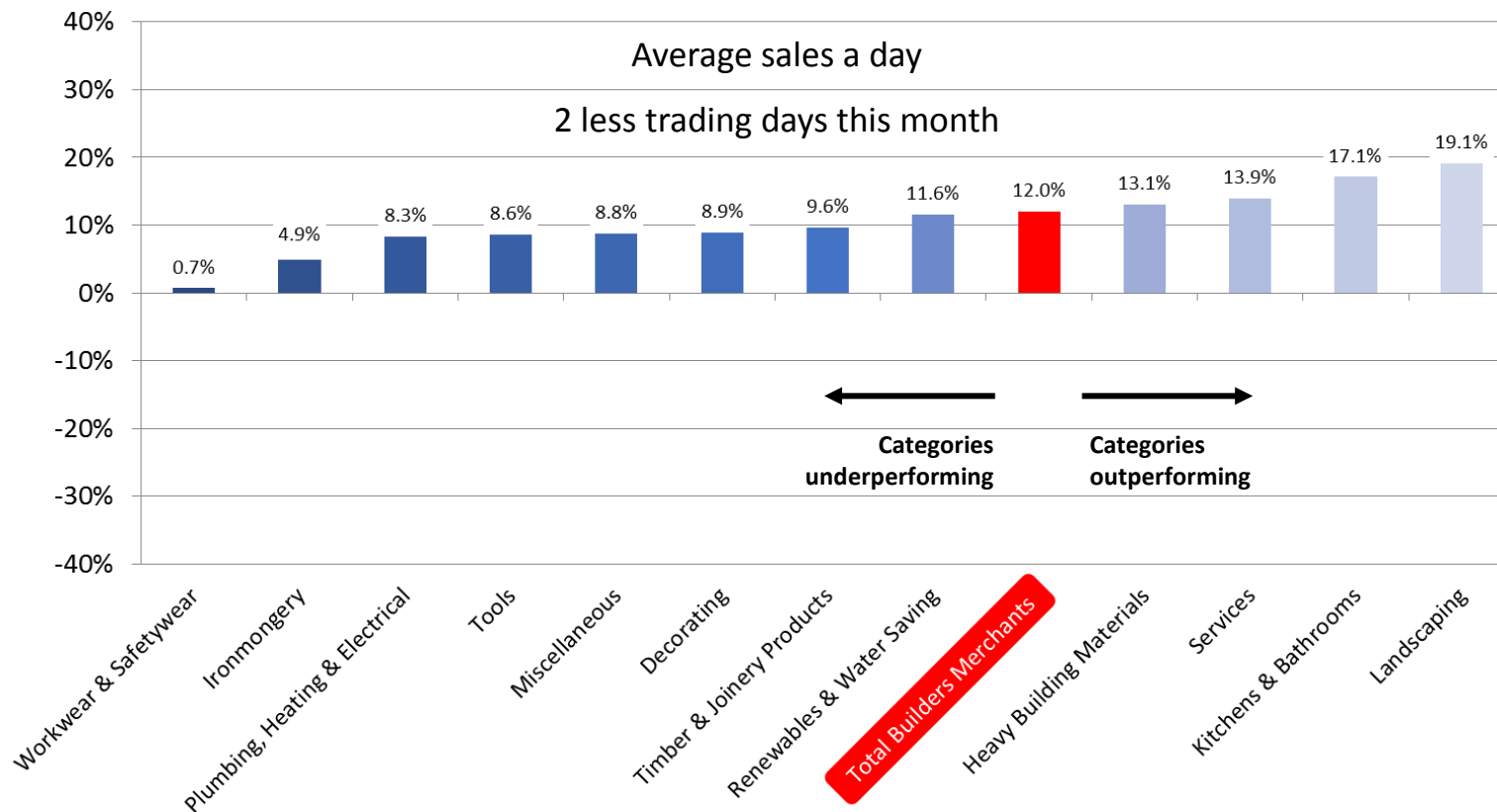
 Source: GfK's Builders Merchants Total Category Report July 2015 to February 2018

Monthly: This Month v Last Month

February 2018 average sales a day indices



February 2018 index v January 2018 index



Source: GfK's Builders Merchants Total Category Report July 2015 to February 2018

Quarterly: Index and Categories

Quarter 4 2016* to Quarter 4 2017

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q4 2016	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Total Builders Merchants	100	100.9	106.0	116.0	119.1	107.2
Timber & Joinery Products	100	100.7	107.1	112.3	117.1	108.1
Heavy Building Materials	100	101.4	105.7	116.9	120.7	107.9
Decorating	100	98.2	101.8	107.2	113.9	102.3
Tools	100	97.3	106.7	104.7	109.8	104.7
Workwear & Safetywear	100	105.5	108.8	95.3	100.9	110.0
Ironmongery	100	107.4	115.3	117.9	125.3	115.2
Landscaping	100	89.8	96.1	146.0	130.4	93.8
Plumbing, Heating & Electrical	100	113.9	119.9	106.0	113.4	122.7
Renewables & Water Saving	100	59.0	78.2	69.4	69.0	69.1
Kitchens & Bathrooms	100	104.7	110.6	109.6	115.2	111.6
Miscellaneous	100	109.4	115.5	112.5	120.5	111.4
Services	100	98.9	99.3	107.6	112.4	100.7

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

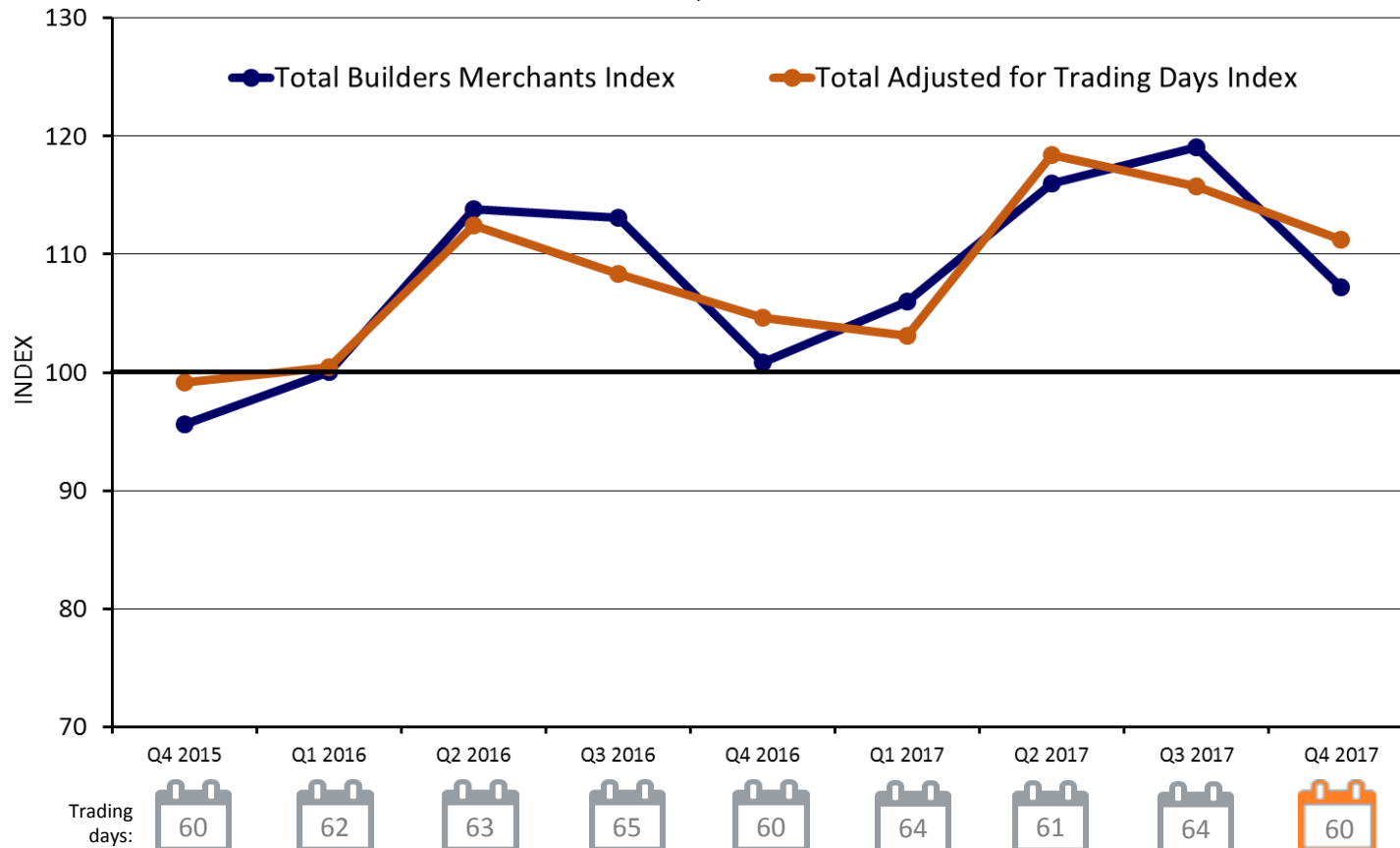
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2017

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 December 2017

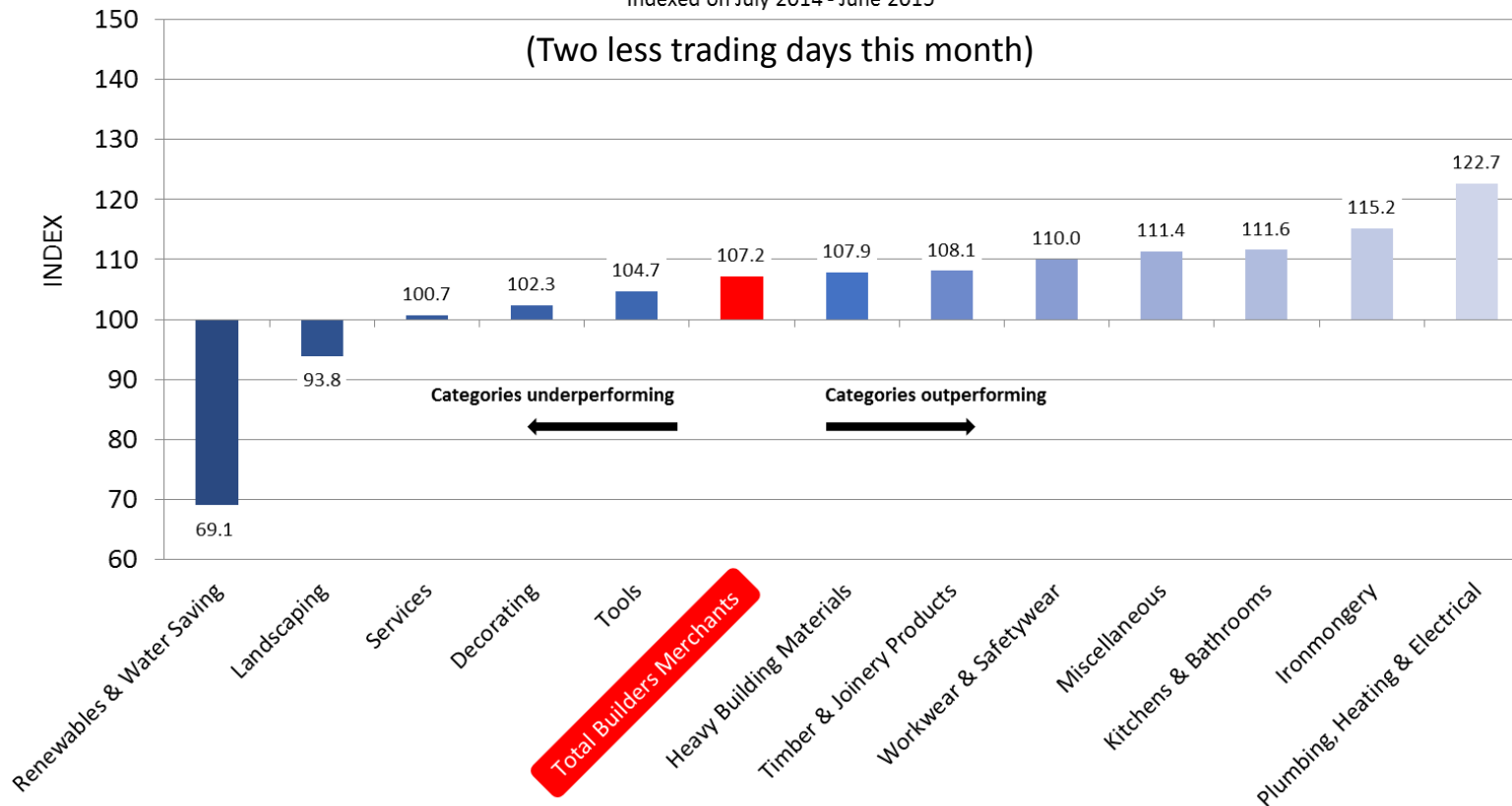
Quarterly: Index and Categories

Q4 2017 index

Quarter 4 2017

Indexed on July 2014 - June 2015

(Two less trading days this month)



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

Quarterly: Index and Categories

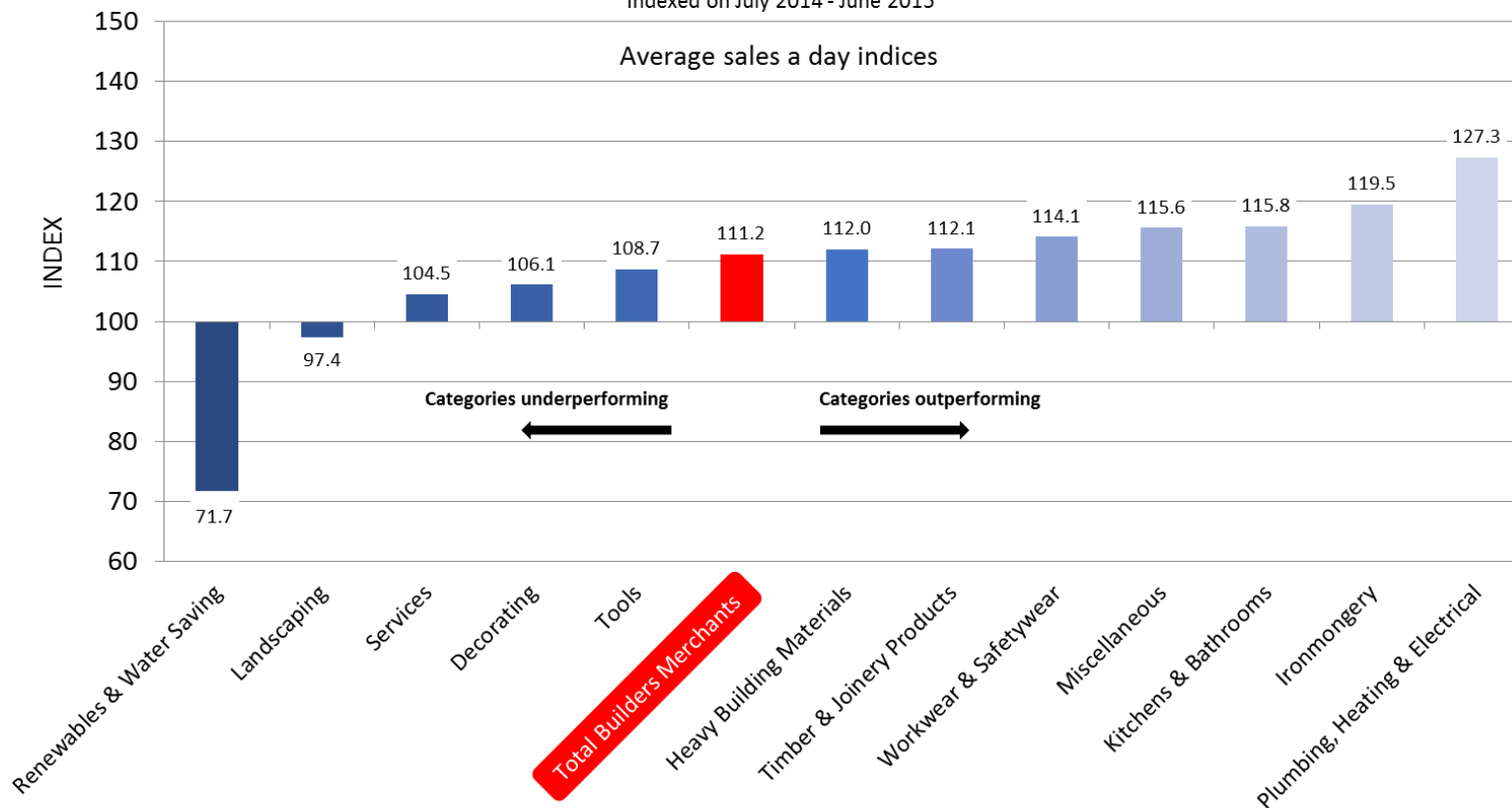
Q4 2017 index

average sales a day

Quarter 4 2017

Indexed on July 2014 - June 2015

Average sales a day indices



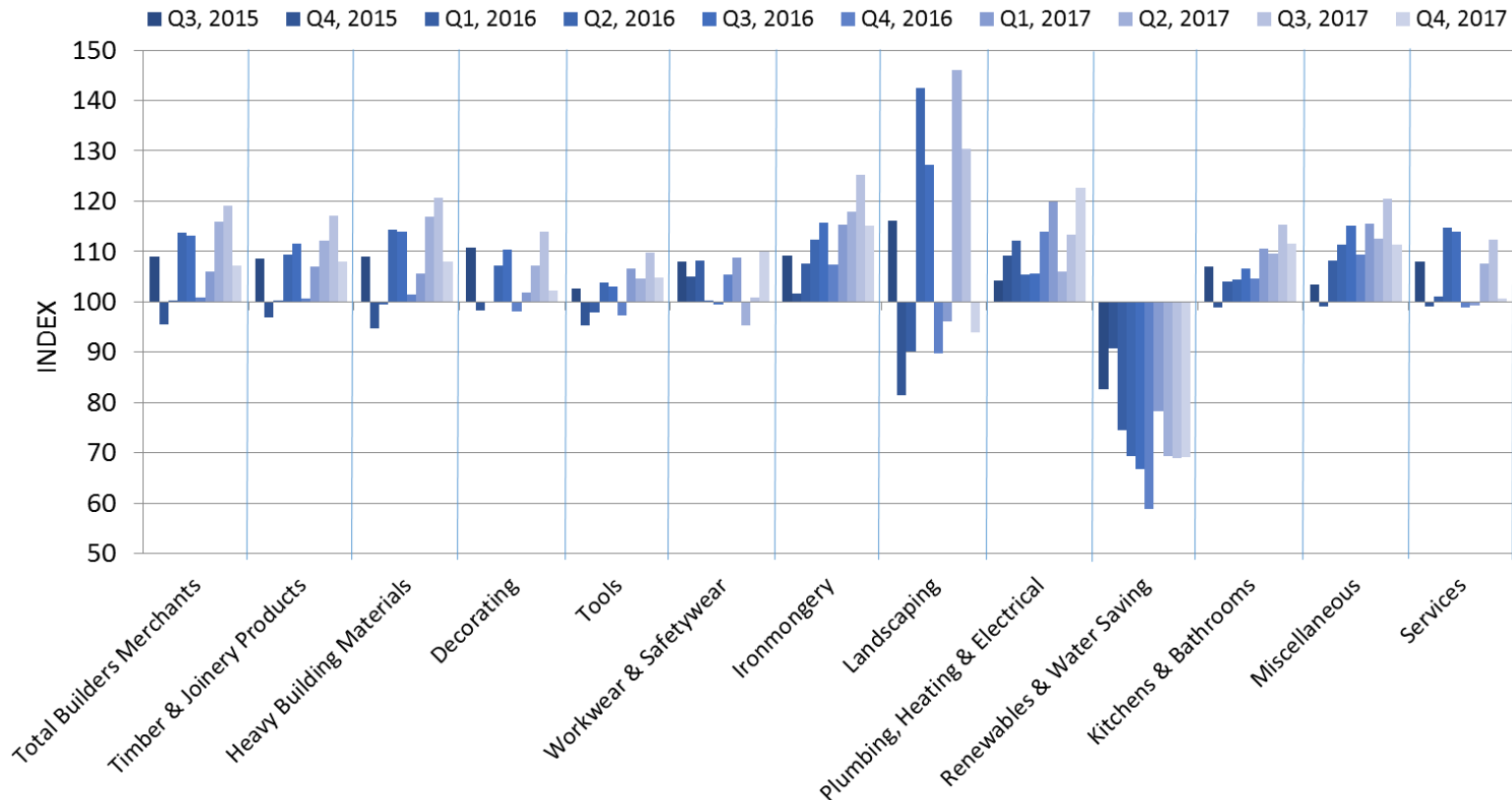
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2017

Quarterly: Index and Categories

Quarterly indices

Quarterly Indices

Indexed on July 2014 to June 2015

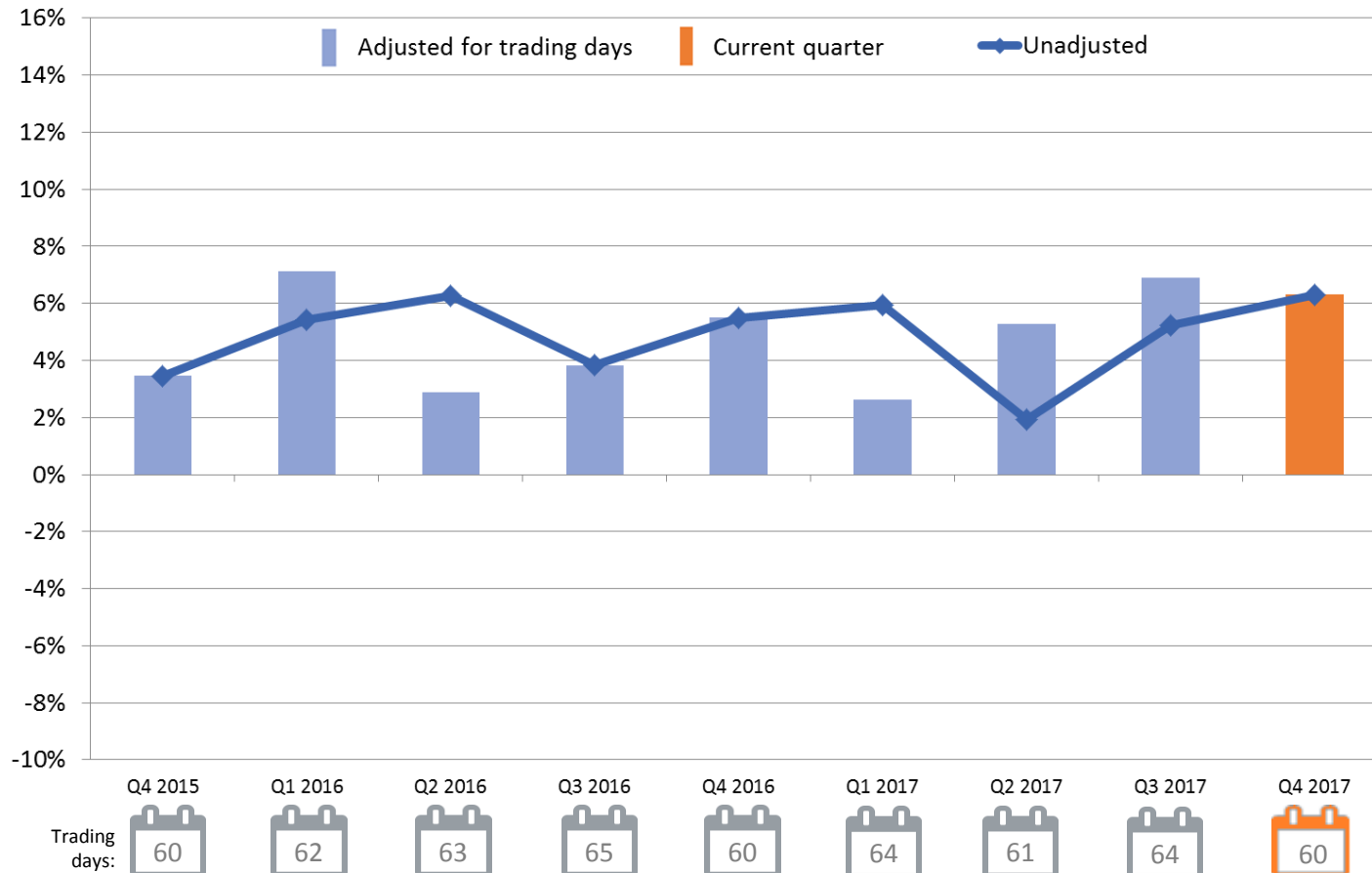


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2017

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year

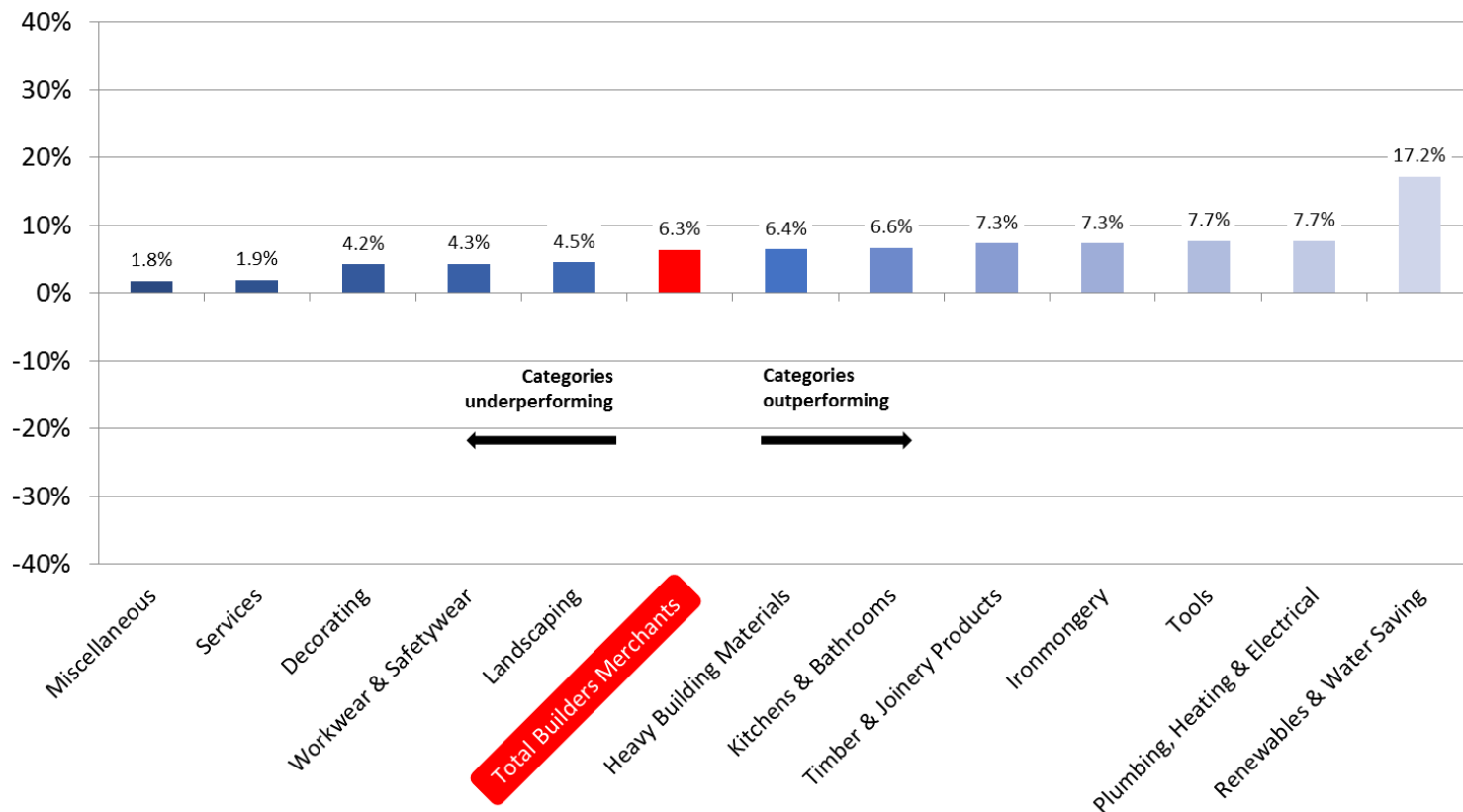


 Source: GfK's Builders Merchants Total Category Report July 2015 to December 2017

Quarterly: This Year v Last Year

Q4 2017 sales indices

Quarter 4 2017 index v Quarter 4 2016 index

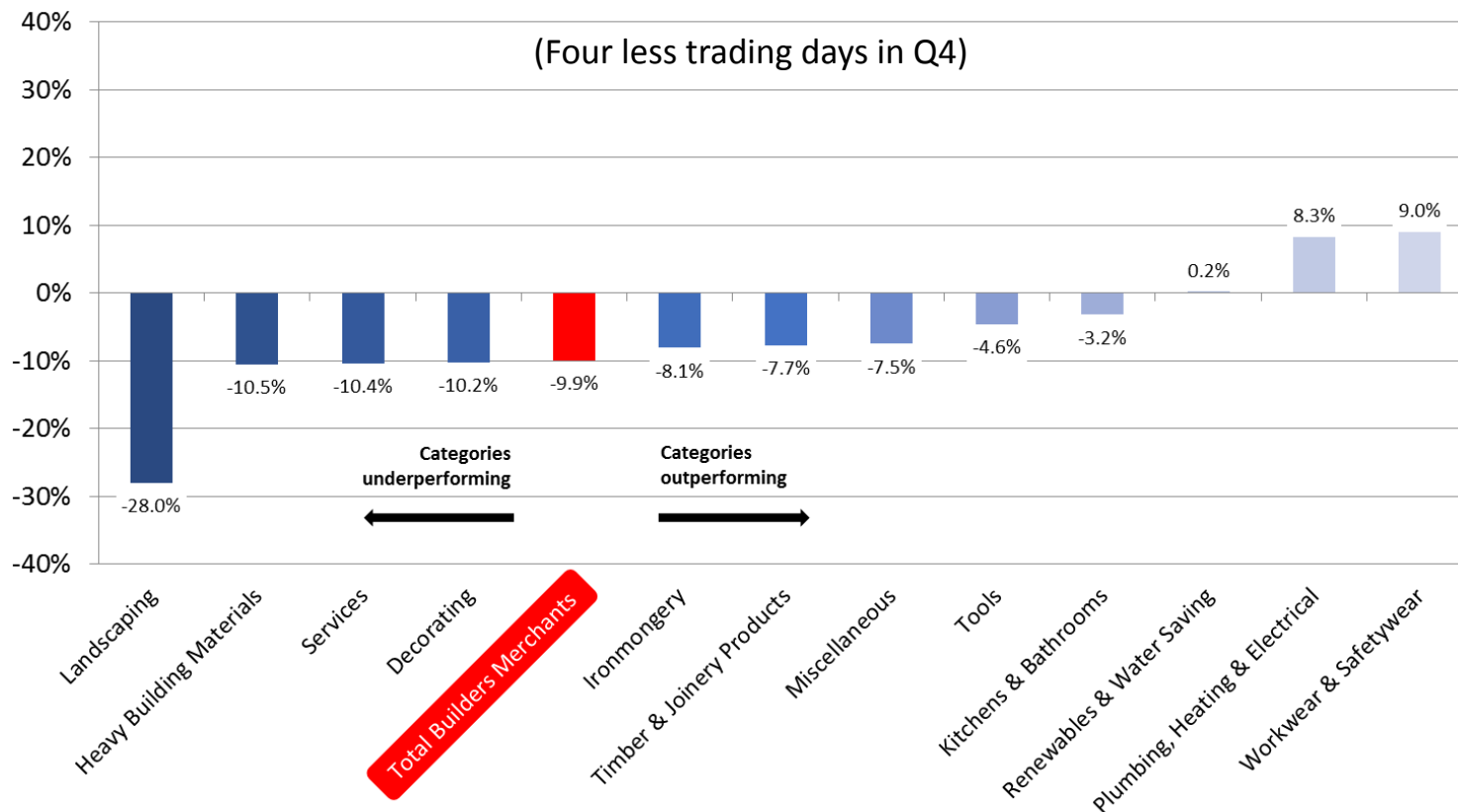


 Source: GfK's Builders Merchants Total Category Report July 2015 to December 2017

Quarterly: Quarter on Quarter

Q4 2017 sales indices

Quarter 4 2017 index v Quarter 3 2017 index

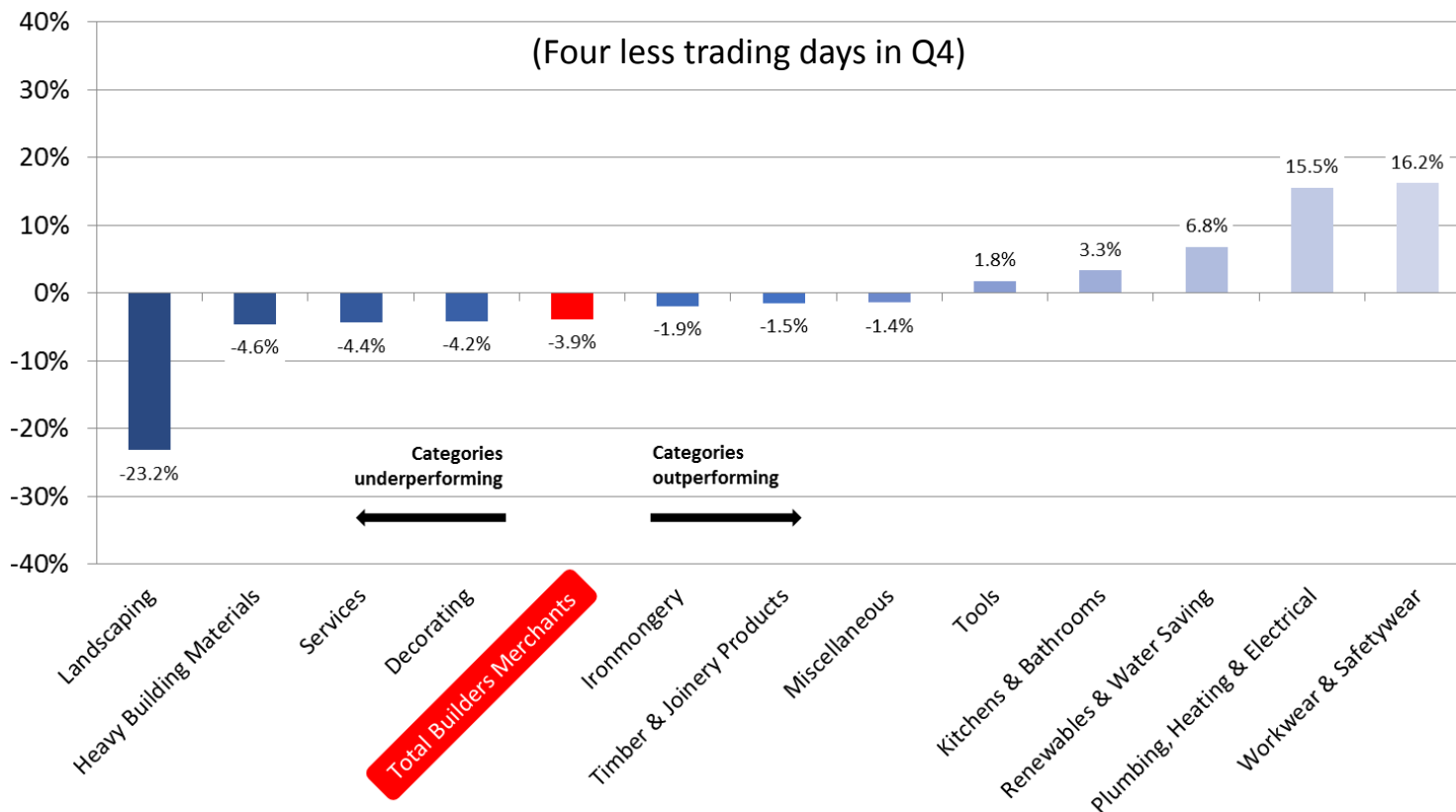


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2017

Quarterly: Quarter on Quarter

Q4 2017 average sales a day indices

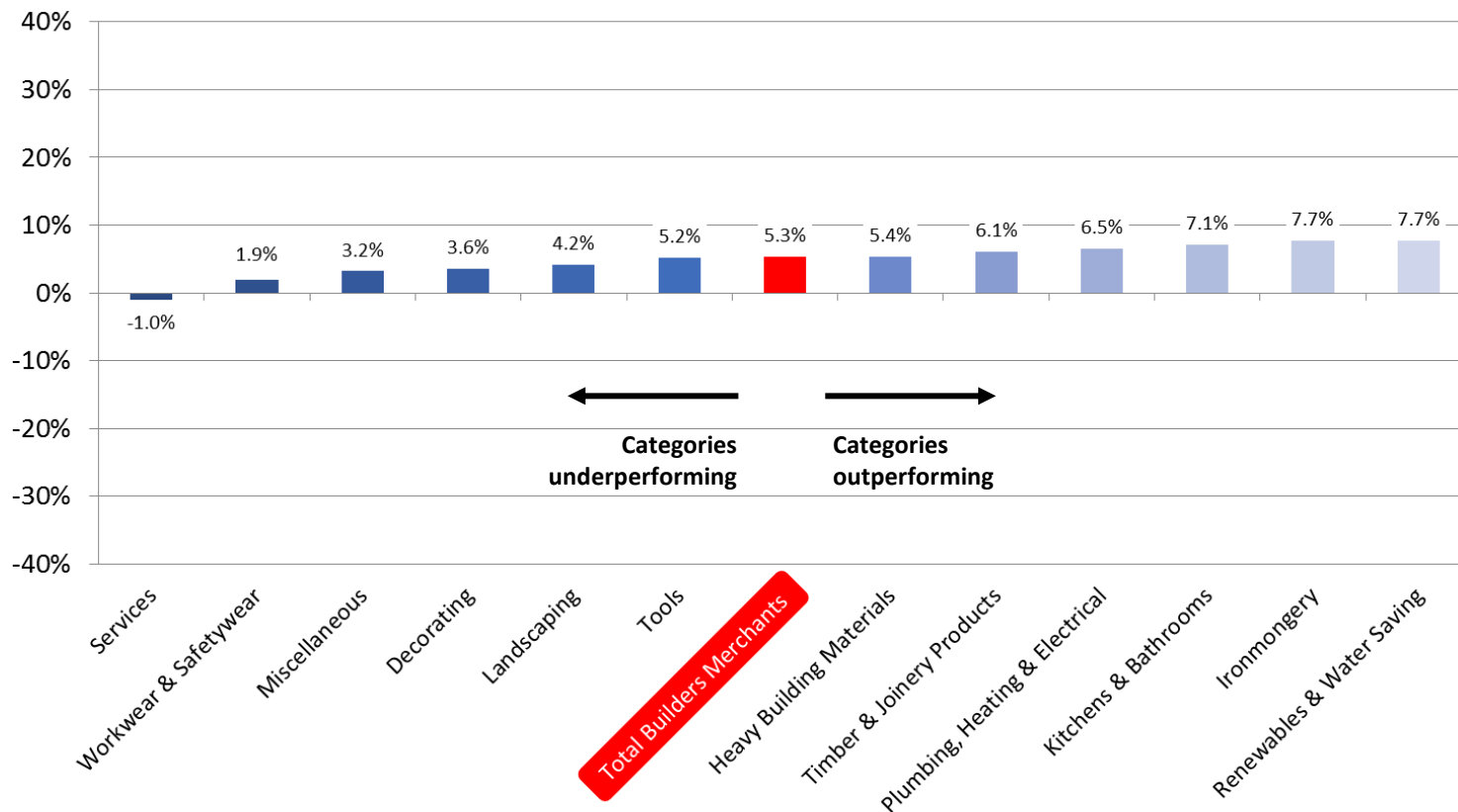
Quarter 4 2017 index v Quarter 3 2017 index



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

Last 12 Months: Year on Year

12 months Mar 17 to Feb 18 v 12 months Mar 16 to Feb 17

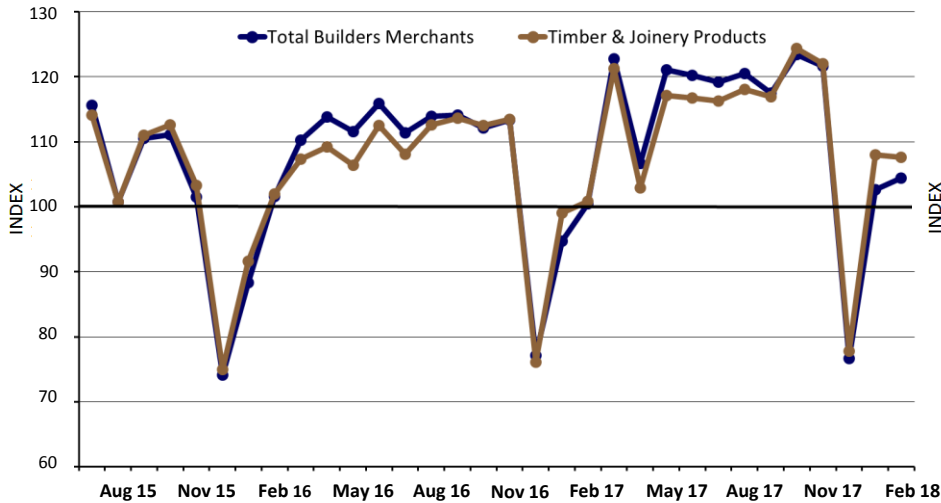


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Indices

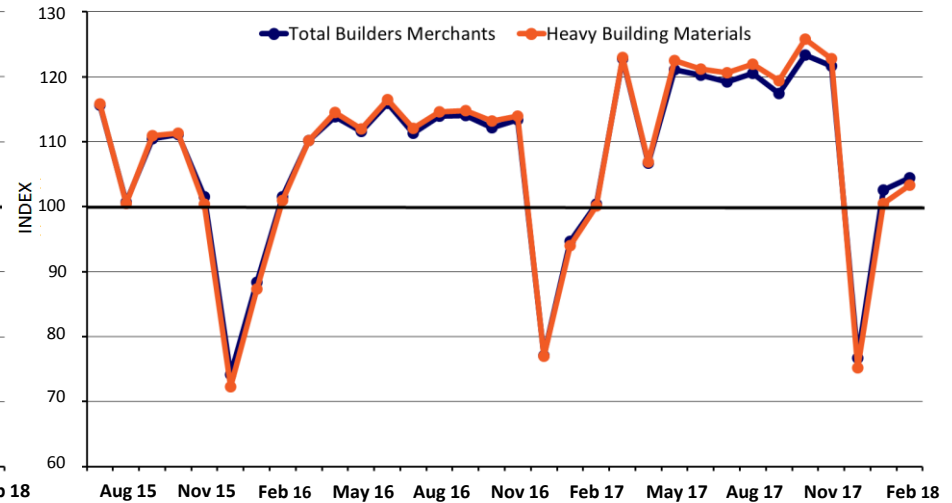
February 2018

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



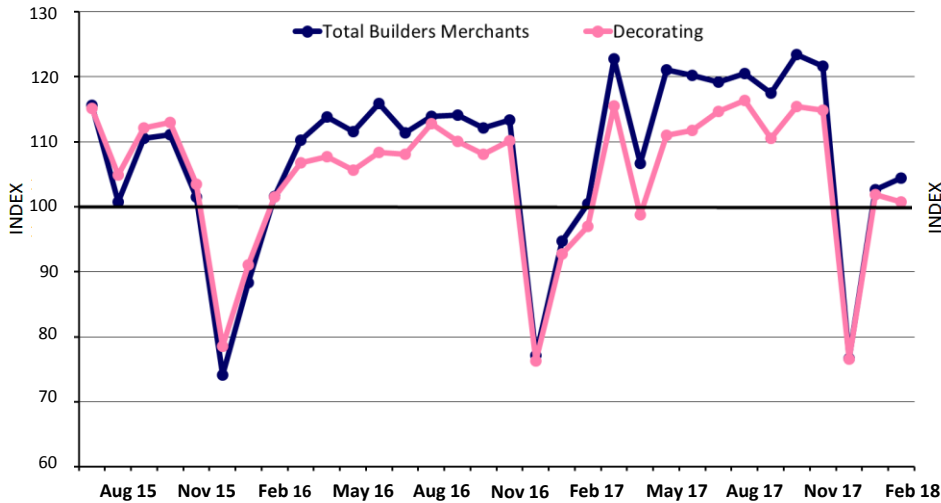
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Indices

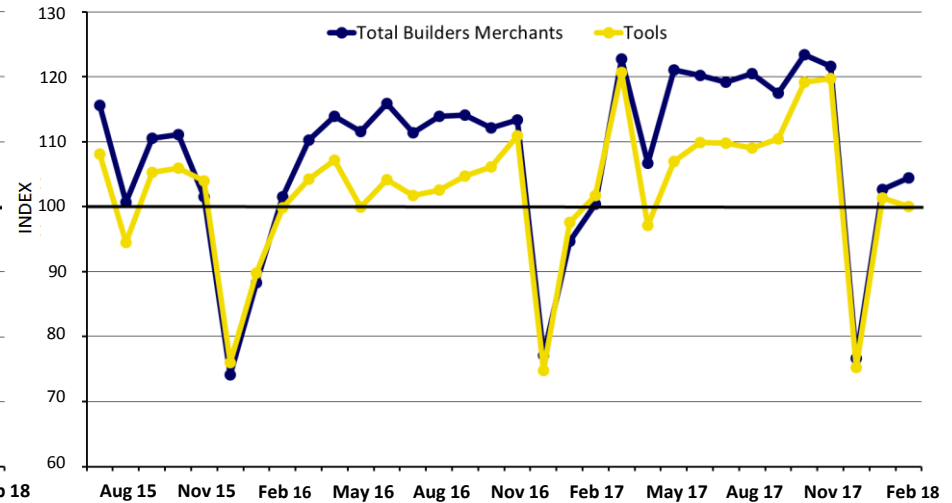
February 2018

Decorating



Indexed on July 2014 – June 2015

Tools



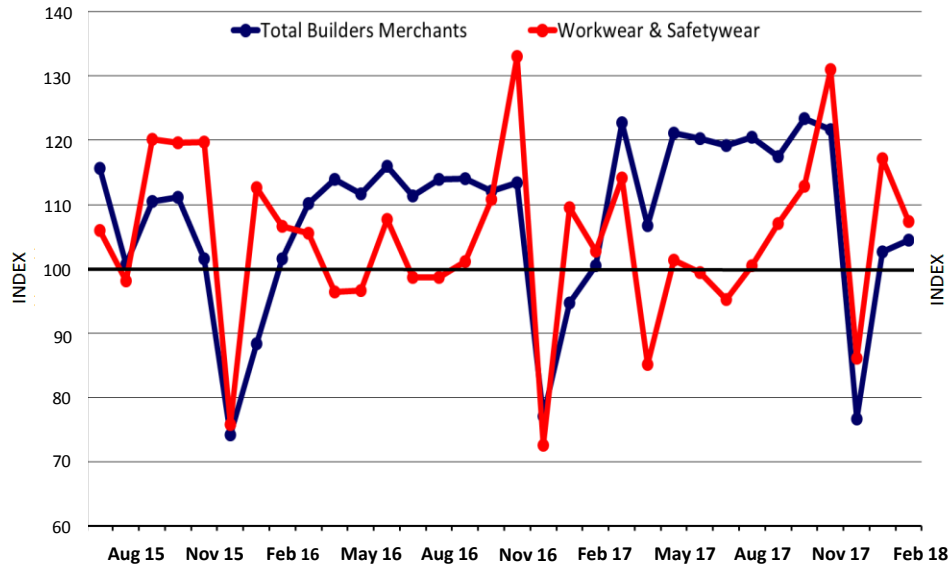
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Indices

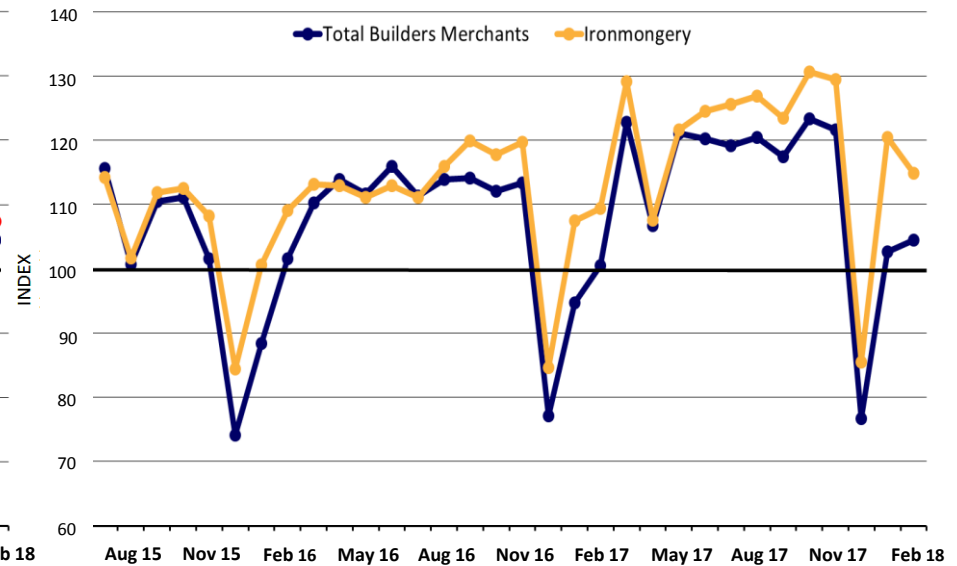
February 2018

Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery



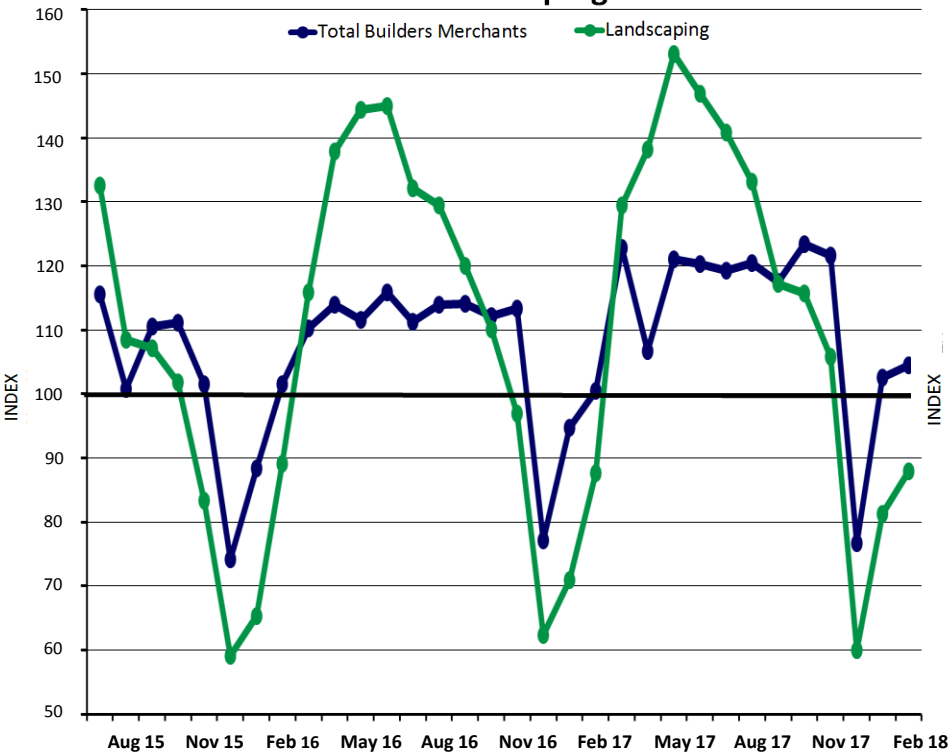
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Indices

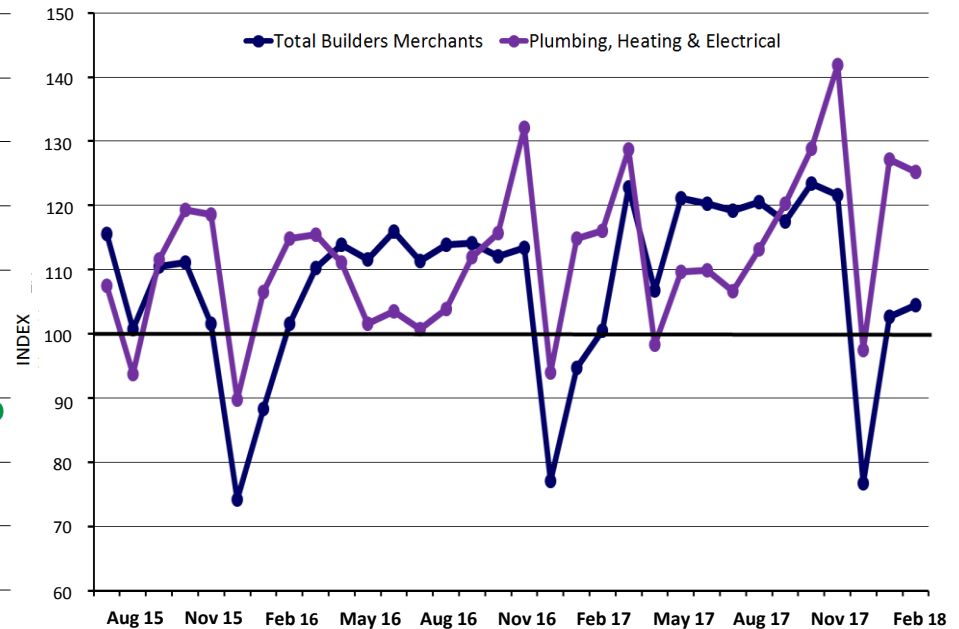
February 2018

Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



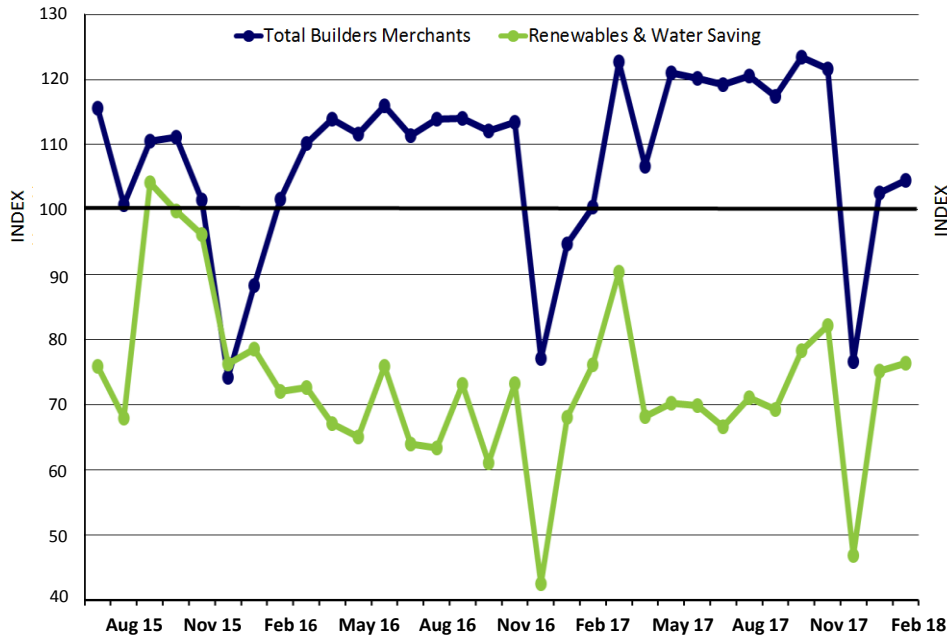
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Indices

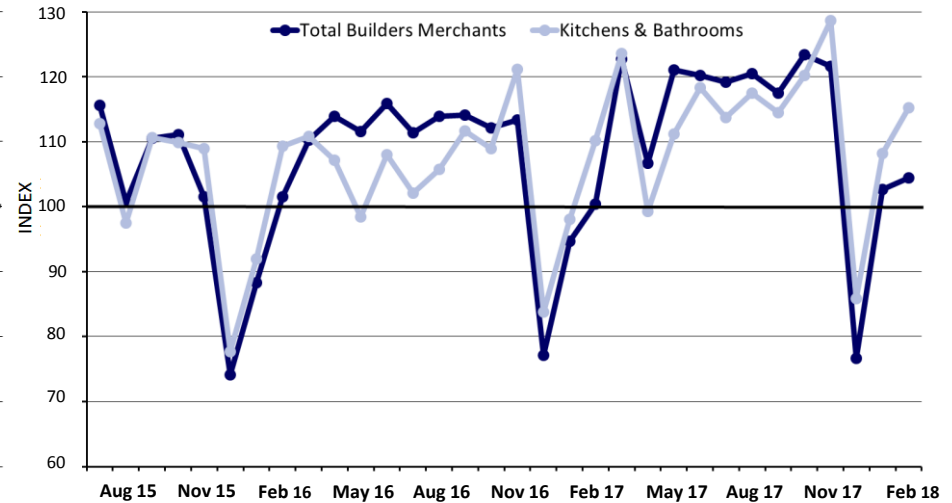
February 2018

Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



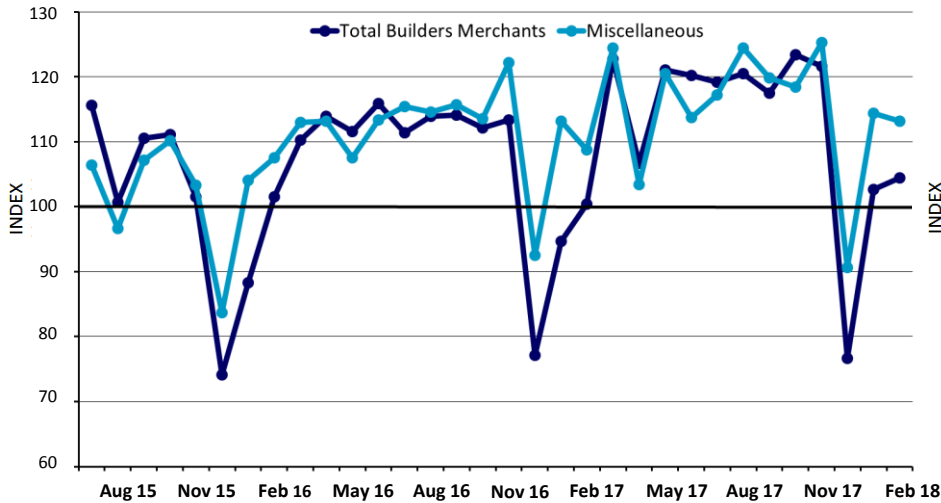
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

Monthly: Indices

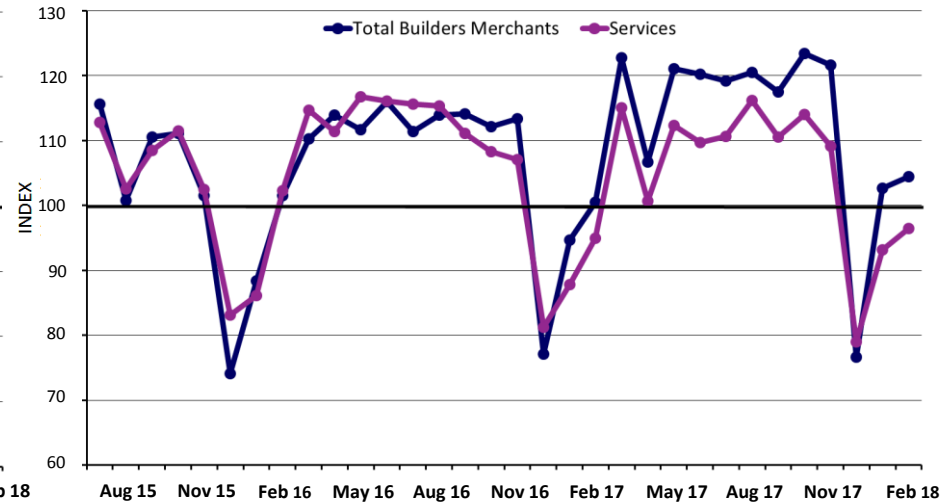
February 2018

Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

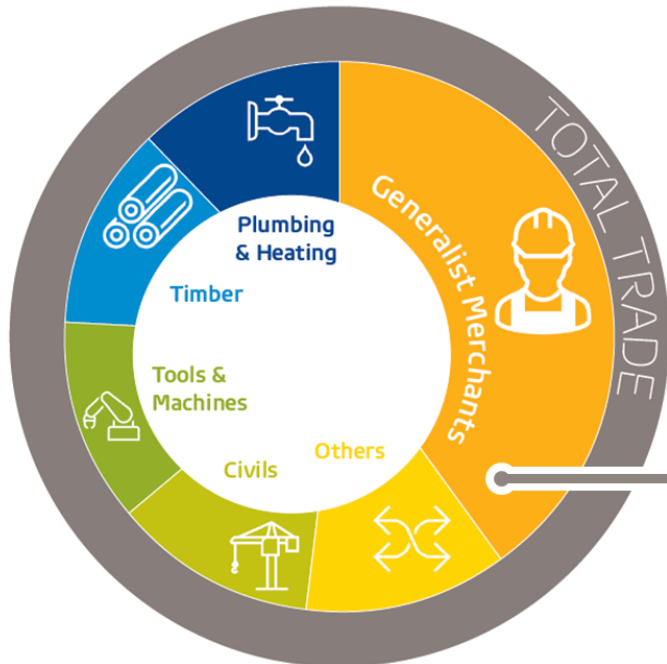
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2018

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

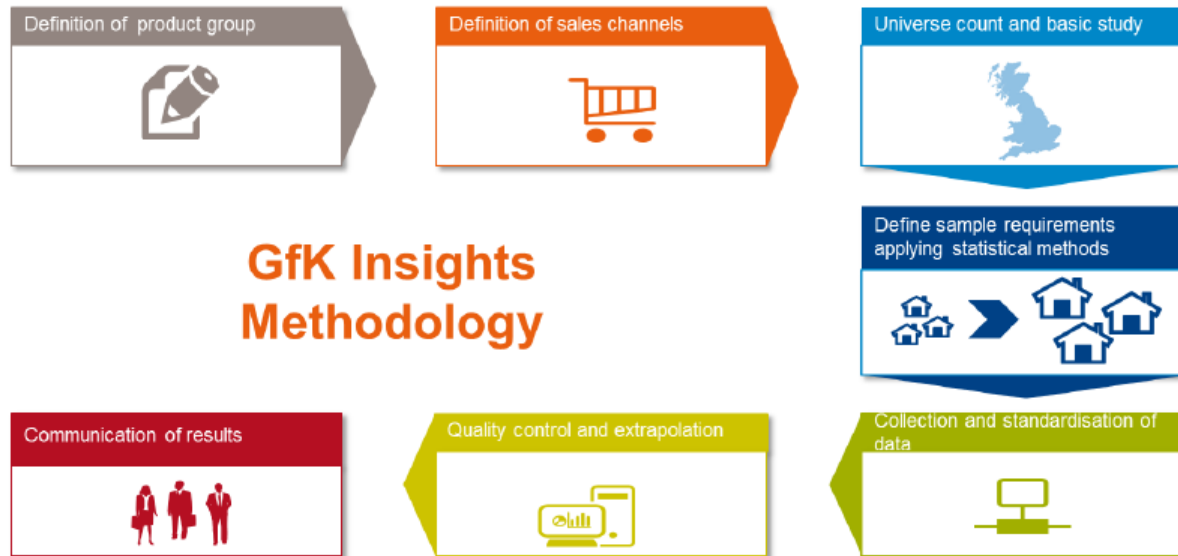
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

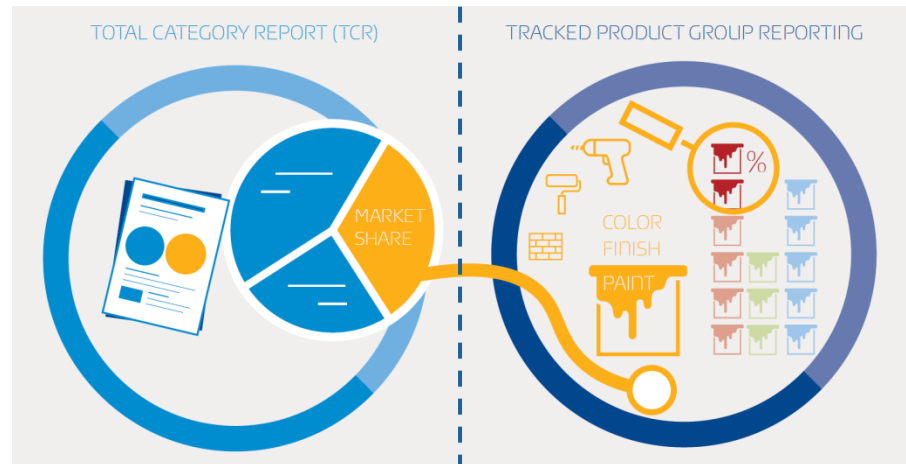
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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

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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