

“one **industry**
one **voice**”

Builders Merchant Building Index



Monthly report for April 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 Q1 report.

Monthly and Quarterly Indices
March 2018 and Q1 2018
Builders Merchant Building Index

Plumbing, Heating & Electrical

GfK's Product Categories
Discover category headline values & in-depth, level insights
Key values available

Macro factors impacting Merchants

New house builds
Quarterly
Home construction dropped off from the 2007 high, with a large number of construction firms leaving the market. As a result we are now seeing housing price stability, as the supply of affordable housing is not meeting current demand.
Looking at a 4 period moving average, the recent trend of continued growth has tapered in 2016. However, it appears to have started in 2017 with a period of growth.
In Q4 2017, 86,710 permanent dwellings were completed compared to Q4 2016's figure of 87,330 (+0.8%).

Expert Panel
Natural Stone Landscaping Products (part of landscaping)

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

The report from the GfK really hit natural landscaping in the first quarter. March was almost completely lost, and we may never get it back, but the market has been recovering and since.
For heat landscaping and indoor sandstone there is little change on shipping and currency issues that will affect the cost of stone. Some products are hard to source globally - a very practical sandstone - has been very difficult. There has also been increased demand for larger format products - we are seeing a very high demand for 900 by 600 size for example.
Porcelain paving continues to be a massive growth area. Even the weather didn't slow porcelain paving down. More and more research branches are starting order ranges with us to test different colors and sizes, and landscapers are using their own design flat to mix products and textures. There also seems to be a move away from some grouting compounds, installers are opting for the structure with better strengths and better bonding properties.
Artificial grass is another strong growth product with many more branches stocking the 4m rolls and selling more of them as the product is taken more seriously. There is a lot of movement and consolidation in this market with company takeovers, and there's probably more to come. Suppliers are having conversations directly with retailers and being able to sell from merchants, a practice that is not going to go down well in our market.
Sales of non-plant supplies suffered particularly from the weather as they cannot be laid on a wet road. Many projects have been delayed but the fact is that we can't use the market being open.
Finally, Happy Birthdays to the 40 (official) founding members, indoor sandstone suppliers should all be full members, as we are, but having responsibility with responsibility of membership.

"The report from the GfK really hit natural landscaping in the first quarter. March was almost completely lost and we may never get it back, but the market has been recovering well since."

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, Talasey Group, 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

Stronger April sales for Merchants

Year on year

Total Builders Merchant value sales were up 8.8% in April compared with April last year, helped by two extra trading days and an earlier Easter. Six categories did better, with Plumbing Heating & Electrical gaining 22.5%, followed by Workwear & Safetywear (+17.7%), Kitchens & Bathrooms (+12.7%) and Timber & Joinery Products (+12.6%). Heavy Building Materials, the largest category, was just off the pace (+8.4%) and only Landscaping sold less (-4.3%).

Average sales a day, which take trading day differences into account, were down 2.1% on April 2017.

Month on month

Overall sales in April were 3.5% higher than in March, despite April having one less trading day. However March was affected by bad weather and included Good Friday this year, both of which held back turnover. Seasonal category, Landscaping (+26.0%) saw the biggest month-on-month increase, followed by Heavy Building Materials (+4.7%).

Average sales a day in April were 8.7% higher than March.

Other periods

The first four months of 2018 were up 2.5% on the same period in 2017, with one additional trading day this year. Plumbing Heating & Electrical (+11.1%) did best, with Kitchens & Bathrooms (+5.7%) also performing well. Average sales a day for January to April were up 1.3% on the same months last year.

The rolling 12 months May 2017 to April 2018 were 4.7% above the same period a year earlier, with one more trading day. Plumbing Heating & Electrical (+8.7%) was strongest.

Index

April's BMBI index was 116.1, with one less trading day. Landscaping was top (132.1) followed by Plumbing Heating & Electrical (120.4). Eleven of the 12 categories exceeded 100.

Total Builders Merchant value sales were up 8.8% in April compared with April last year, helped by two extra trading days and an earlier Easter.

The first four months of 2018 were up 2.5% on the same period in 2017.

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 Q1 2018 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: Q1 2018 Report](#)



Steve Durdant-Hollamby
Managing Director
Alumasc Water Management Systems



Expert for Civils, Metal Rainwater & Drainage

[Read latest Comment: Q1 2018 Report](#)



John Duffin
Managing Director
Keylite Roof Windows



Expert for Roof Windows

[Read latest Comment: Q1 2018 Report](#)



Andrew Simpson
National Commercial Director
Hanson Cement



Expert for Cement & Aggregates

[Read latest Comment: Q1 2018 Report](#)



Nigel Cox
Managing Director
Timbmet



Expert for Timber & Panel Products

[Read latest Comment: Q1 2018 Report](#)



Andy Williamson
Group Managing Director
IKO PLC



Expert for Roofing Products

[Read latest Comment: Q1 2018 Report](#)

The Expert Panel

Speaking for their markets - 2



Derrick McFarland
Managing Director
Keystone Lintels

Expert for Steel Lintels



[Read latest Comment: Q1 2018 Report](#)



Tony France
Sales Director
Ibstock

Expert for Bricks



[Read latest Comment: Q1 2018 Report](#)



John Sinfield
Managing Director
Knauf Insulation

Expert for Mineral Wool Insulation



[Read latest Comment: Q1 2018 Report](#)



Paul Rivett
Managing Director
Heatrae Sadia

Expert for Water Heating



[Read latest Comment: Q1 2018 Report](#)



Mike Beard
Merchant Development
Director
Encon Insulation

**Expert for Insulation Products -
Distribution**



[Read latest Comment: Q1 2018 Report](#)



Malcolm Gough
Group Sales & Marketing
Director
Talasey Group

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



[Read latest Comment: Q1 2018 Report](#)

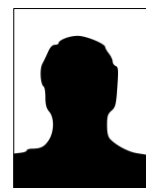


Paul Roughan
Trade Merchants Sales Director
Dulux Trade

Expert for Paint



[Read latest Comment: Q1 2018 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

April 2017* – April 2018

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



MONTHLY SALES VALUE INDEX	Index	2017									2018			
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Total Builders Merchants	100	106.7	121.1	120.2	119.2	120.2	117.5	123.4	121.6	76.7	102.6	104.5	112.2	116.1
Timber & Joinery Products	100	102.9	117.1	116.7	116.3	117.3	116.9	124.4	122.1	77.8	108.0	107.6	112.9	115.9
Heavy Building Materials	100	106.9	122.5	121.2	120.6	121.6	119.4	125.8	122.8	75.2	100.5	103.3	110.8	115.9
Decorating	100	98.8	111.0	111.8	114.6	115.6	110.5	115.4	114.9	76.6	101.9	100.8	106.5	106.6
Tools	100	97.2	107.0	109.9	109.8	110.8	110.4	119.2	119.8	75.3	101.3	100.0	111.2	105.1
Workwear & Safetywear	100	85.1	101.4	99.4	95.2	96.2	107.0	112.9	131.0	86.1	117.2	107.3	108.3	100.2
Ironmongery	100	107.5	121.6	124.5	125.6	126.6	123.4	130.6	129.5	85.5	120.4	114.8	118.0	117.3
Landscaping	100	138.1	153.1	146.9	140.8	141.8	117.1	115.8	105.8	60.0	81.3	88.0	104.8	132.1
Plumbing, Heating & Electrical	100	98.3	109.7	110.0	106.6	107.6	120.3	128.9	141.9	97.4	127.2	125.2	136.1	120.4
Renewables & Water Saving	100	68.2	70.2	69.9	66.6	67.6	69.2	78.3	82.2	46.8	75.2	76.3	79.8	74.2
Kitchens & Bathrooms	100	99.3	111.3	118.3	113.7	114.7	114.5	120.2	128.6	85.9	108.2	115.2	120.3	111.9
Miscellaneous	100	103.4	120.5	113.7	117.2	118.2	119.8	118.4	125.3	90.7	114.4	113.2	114.2	111.3
Services	100	100.6	112.4	109.7	110.6	111.6	110.6	114.0	109.2	79.0	93.1	96.4	107.3	109.6

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

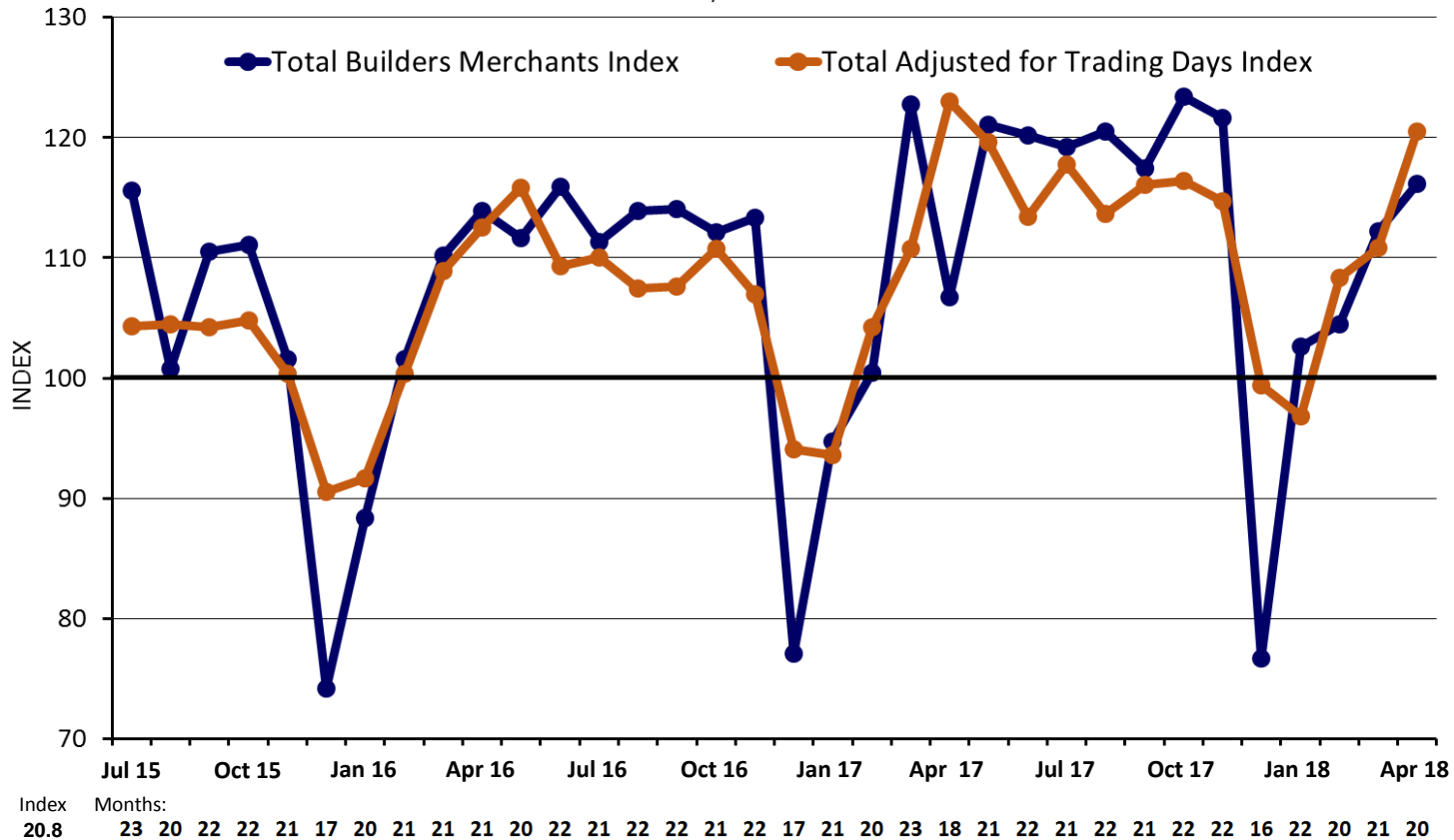
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2018

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 April 2018

Trading days:

Index 20.8

Months:

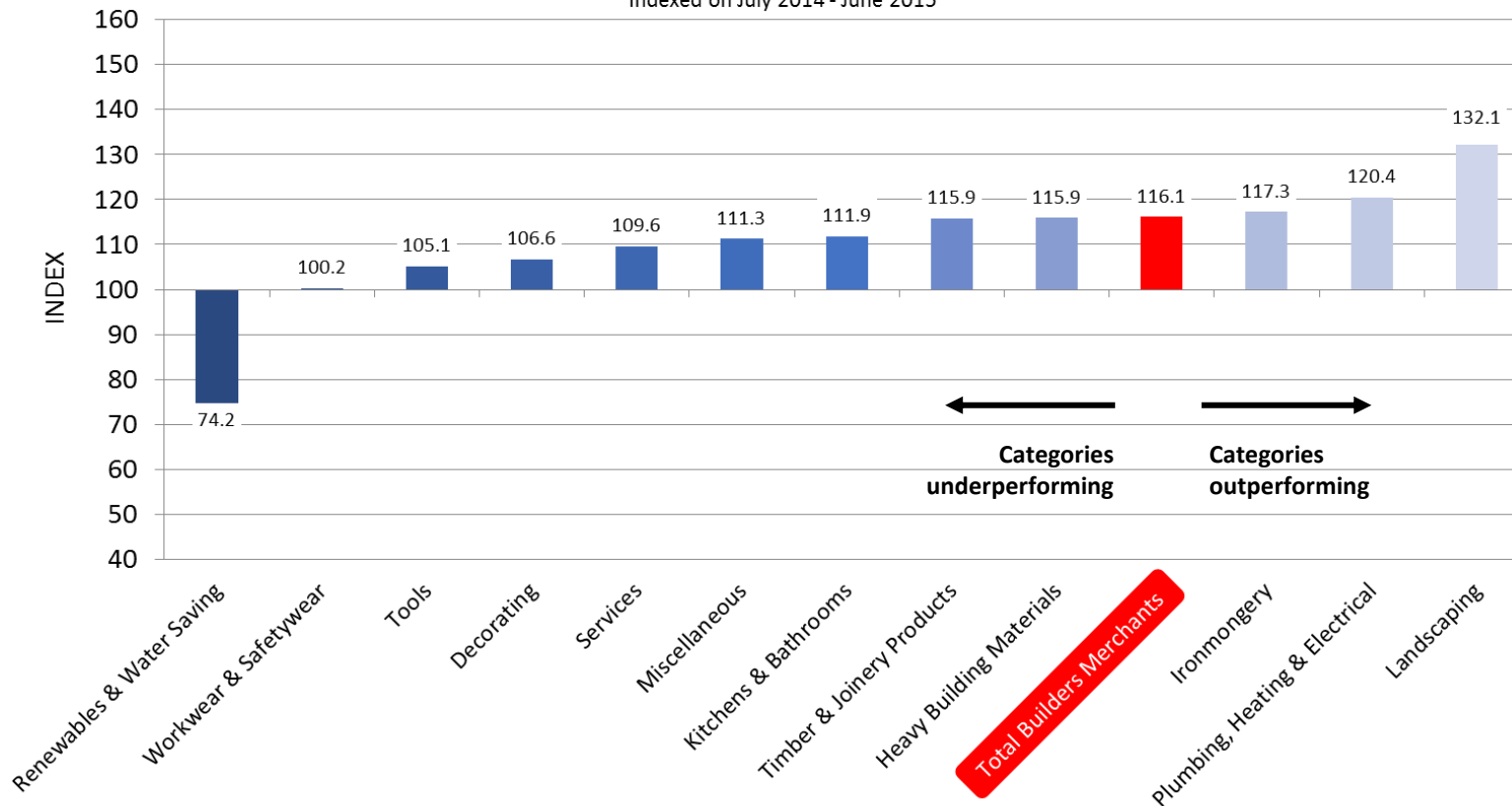
23 20 22 22 21 17 20 21 21 21 20 22 21 22 22 21 22 17 21 20 23 18 21 22 21 22 21 22 22 16 22 20 21 20

Monthly: Index and Categories

April 2018 index

April 2018 Index

Indexed on July 2014 - June 2015

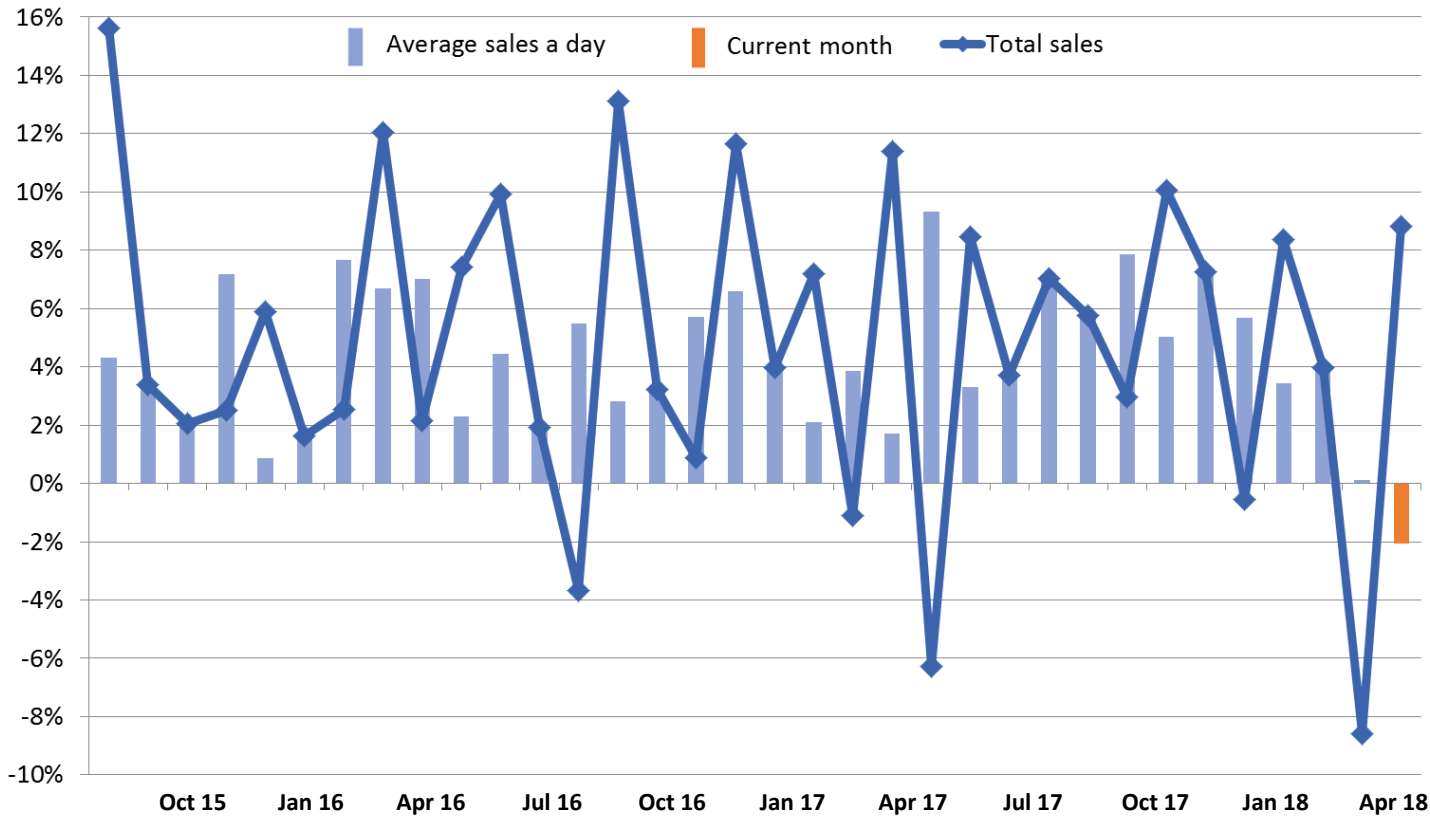


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2018

Monthly: Sales Indices

Adjusted and unadjusted for trading days

Monthly: Year on Year



Trading days:

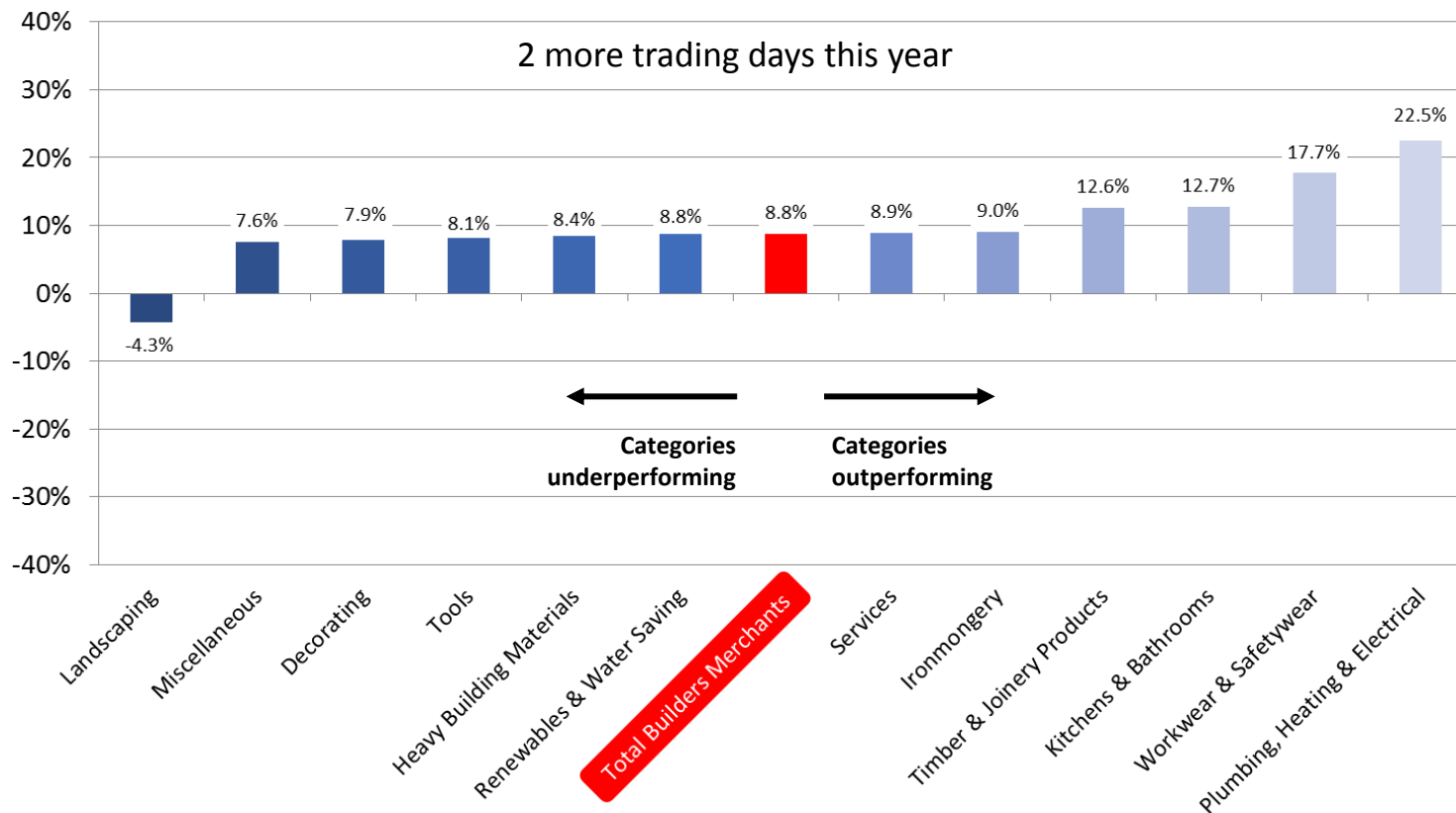
Index Months: 20.8 23 20 22 22 21 17 20 21 21 21 20 22 21 22 22 21 22 17 21 20 23 18 21 22 21 22 21 22 22 16 22 20 21 20

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

Monthly: This Year v Last Year

April 2018 sales indices

April 2018 index v April 2017 index

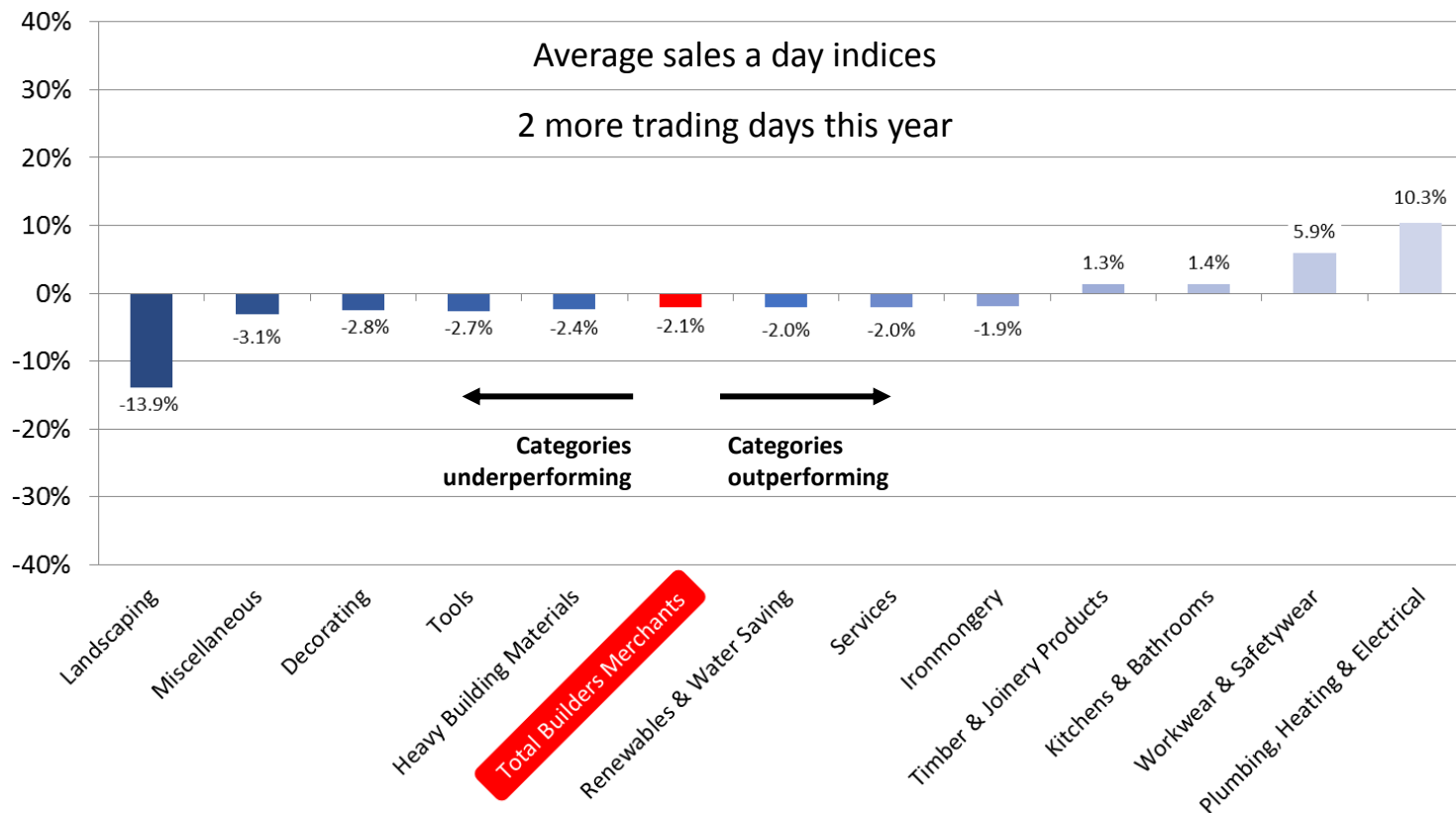


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2018

Monthly: This Year v Last Year

April 2018 average sales a day indices

April 2018 index v April 2017 index

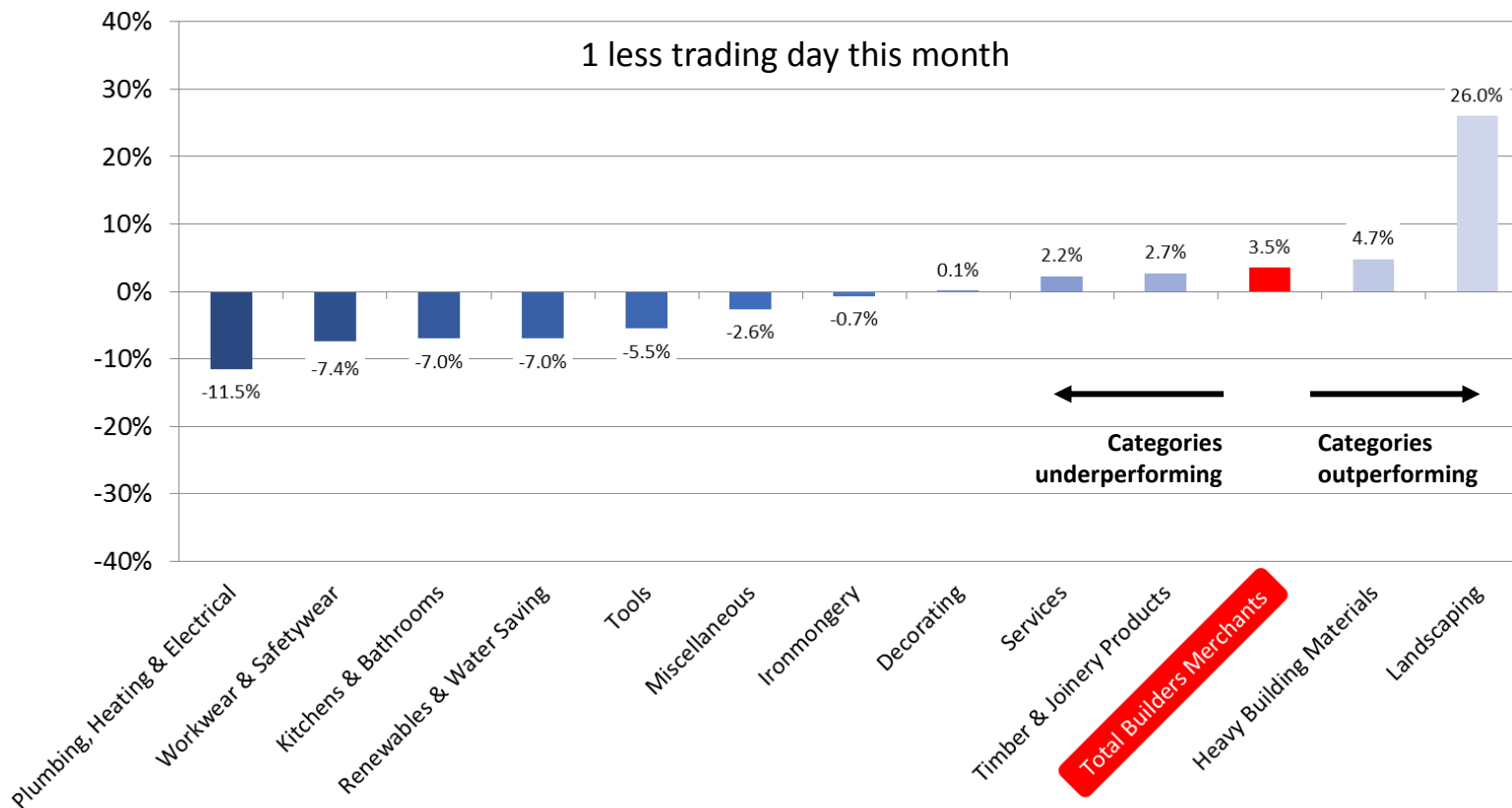


 Source: GfK's Builders Merchants Total Category Report July 2015 to April 2018

Monthly: This Month v Last Month

April 2018 sales indices

April 2018 index v March 2018 index

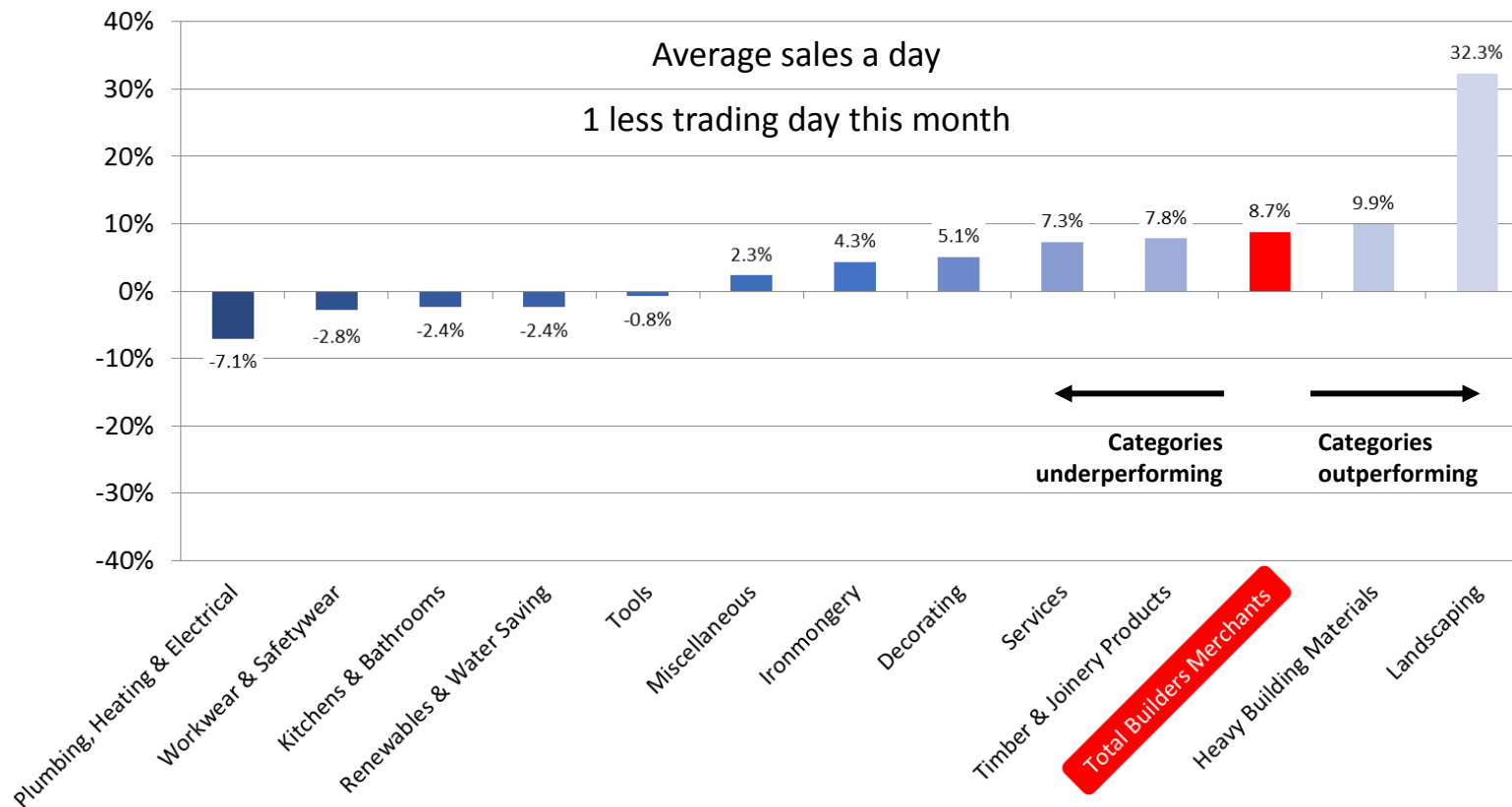


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2018

Monthly: This Month v Last Month

April 2018 average sales a day indices

April 2018 index v March 2018 index



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

Quarterly: Index and Categories


Quarter 1 2017* to Quarter 1 2018

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q1 2017	Q2 2017	Q3 2017	Q4 2017	Q1 2018
Total Builders Merchants	100	106.0	116.0	119.1	107.2	106.4
Timber & Joinery Products	100	107.1	112.3	117.1	108.1	109.5
Heavy Building Materials	100	105.7	116.9	120.7	107.9	104.9
Decorating	100	101.8	107.2	113.9	102.3	103.0
Tools	100	106.7	104.7	109.8	104.7	104.2
Workwear & Safetywear	100	108.8	95.3	100.9	110.0	110.9
Ironmongery	100	115.3	117.9	125.3	115.2	117.8
Landscaping	100	96.1	146.0	130.4	93.8	91.4
Plumbing, Heating & Electrical	100	119.9	106.0	113.4	122.7	129.5
Renewables & Water Saving	100	78.2	69.4	69.0	69.1	77.1
Kitchens & Bathrooms	100	110.6	109.6	115.2	111.6	114.6
Miscellaneous	100	115.5	112.5	120.5	111.4	113.9
Services	100	99.3	107.6	112.4	100.7	98.9

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

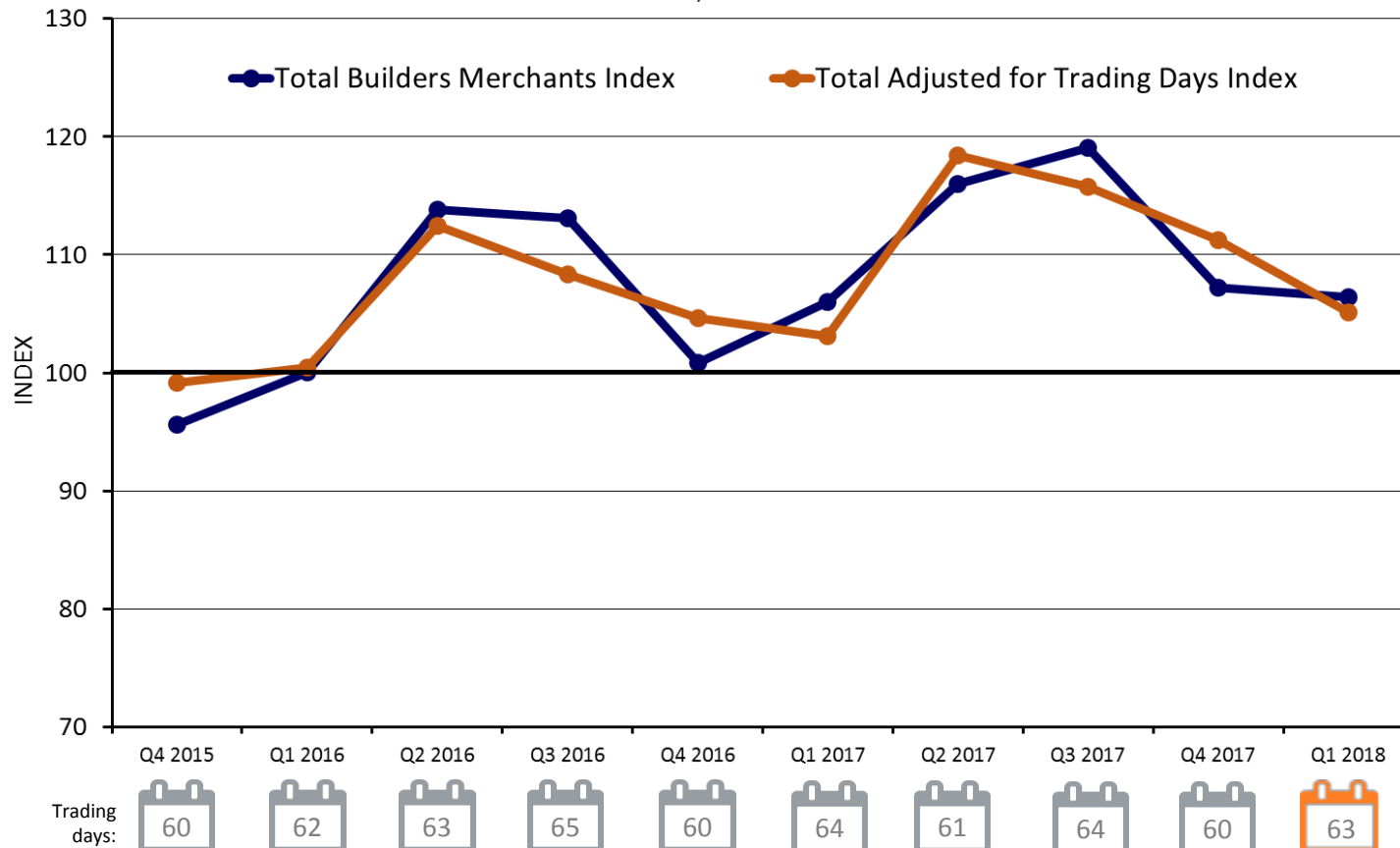
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2018

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



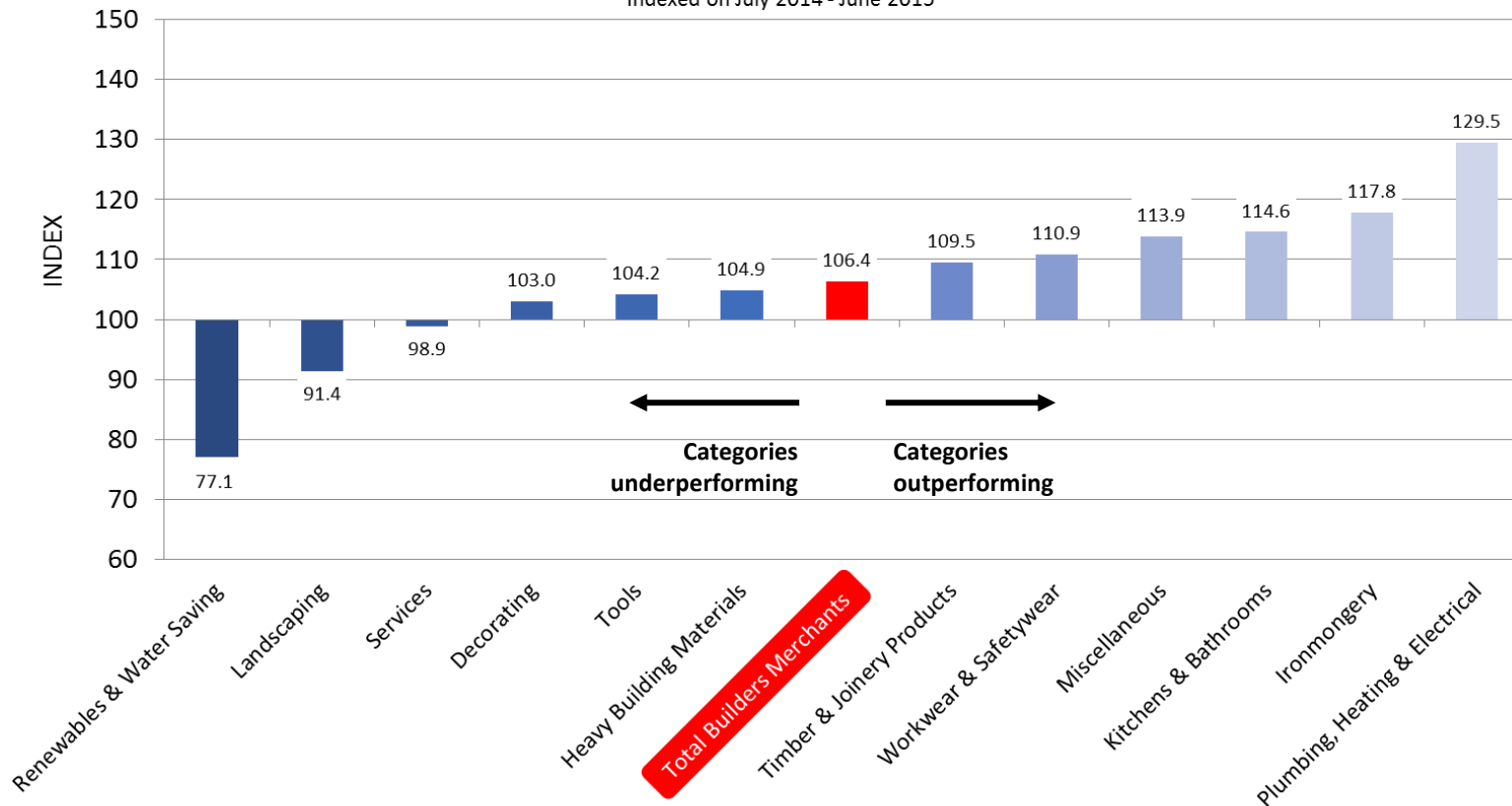
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2018

Quarterly: Index and Categories

Q1 2018 index

Quarter 1 2018

Indexed on July 2014 - June 2015



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

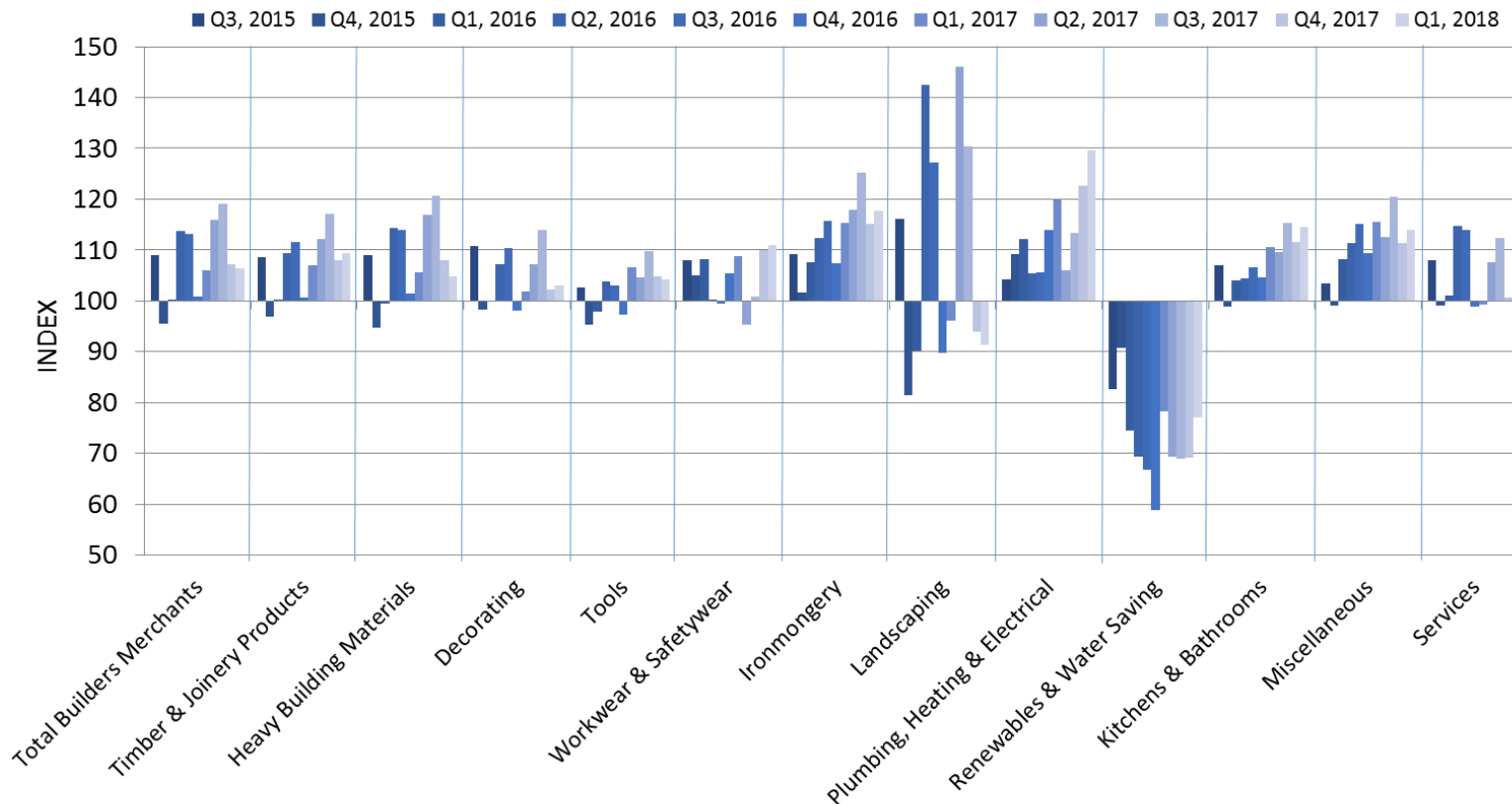
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices

Indexed on July 2014 to June 2015

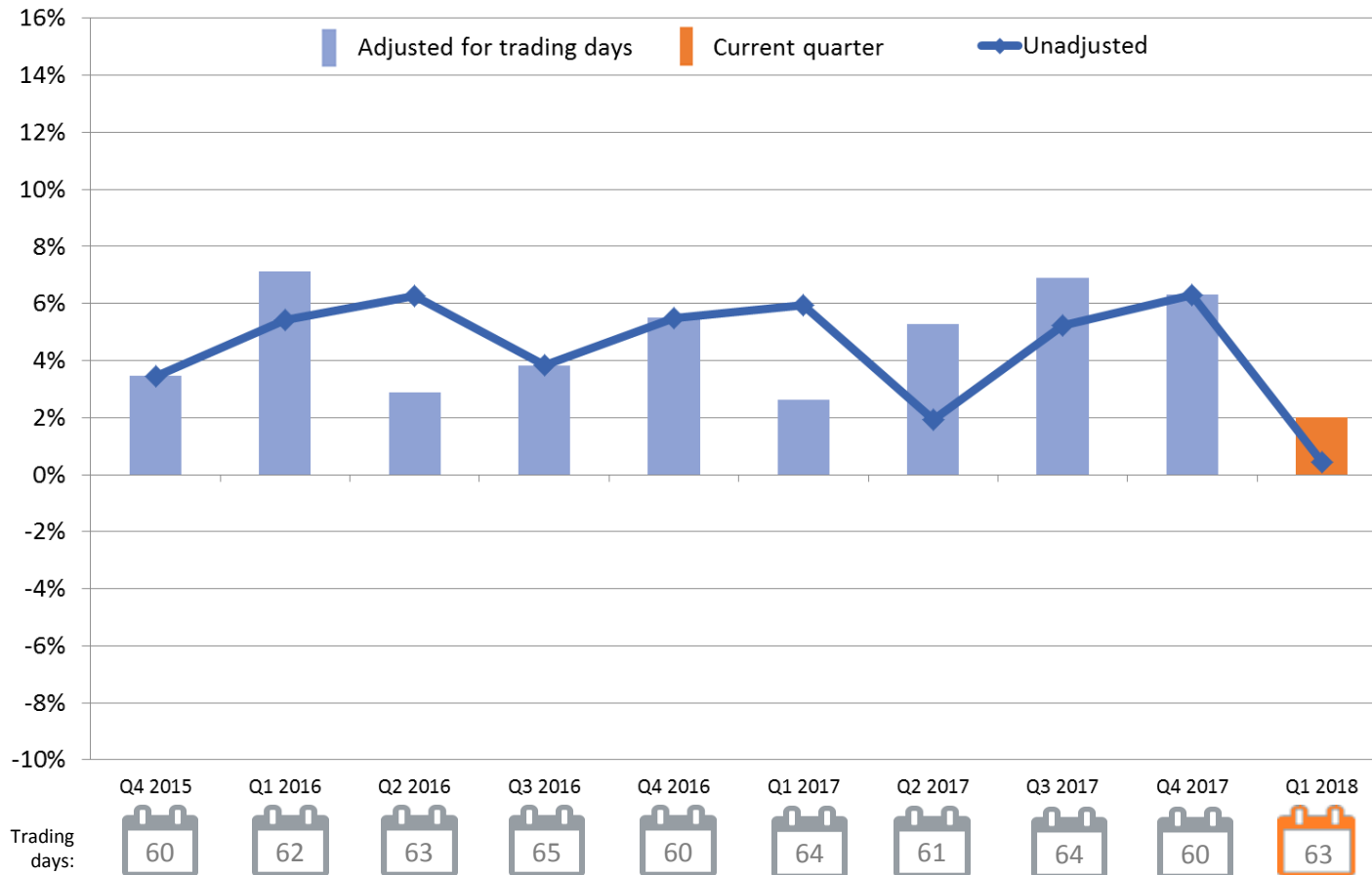


Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year

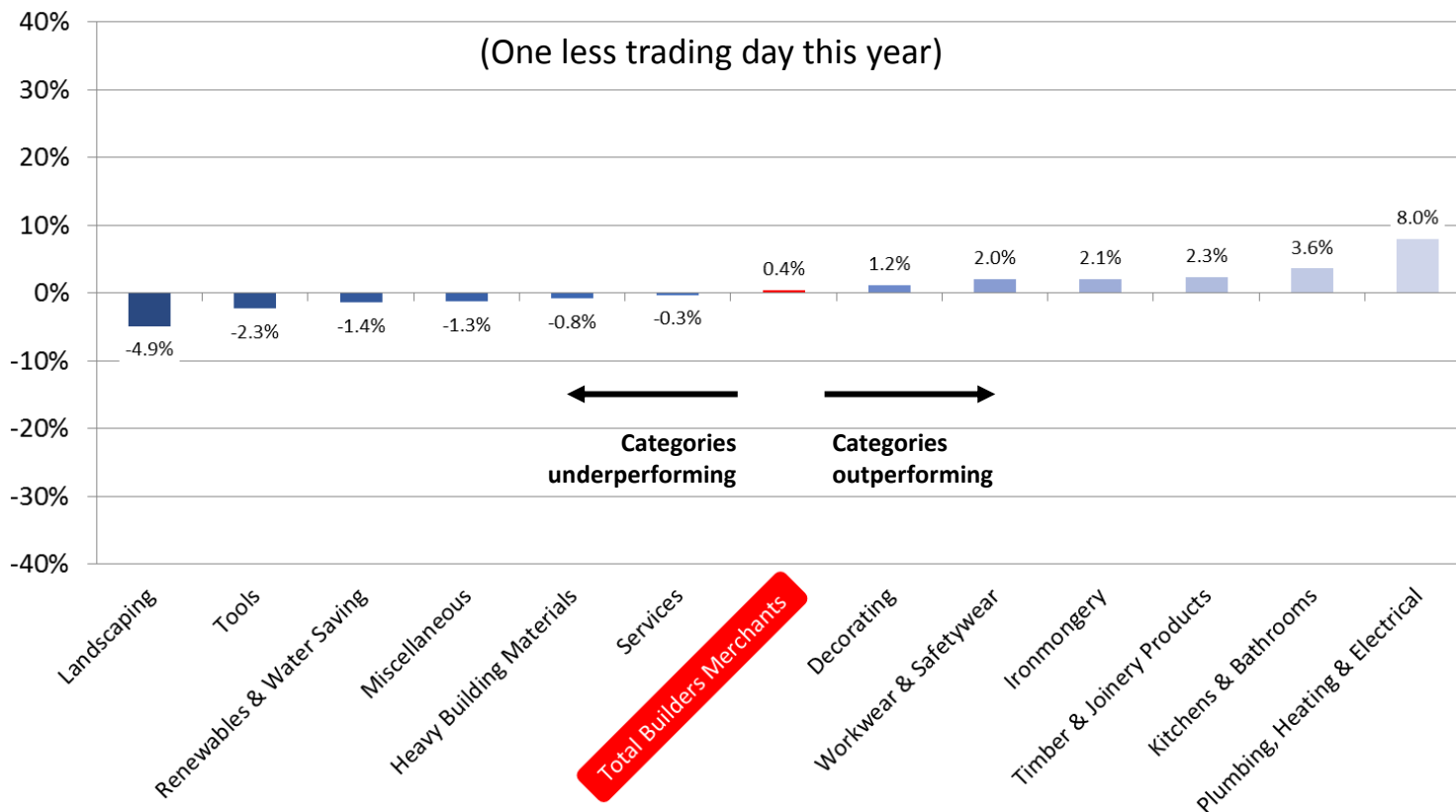


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2018

Quarterly: This Year v Last Year

Q1 2018 sales indices

Quarter 1 2018 index v Quarter 1 2017 index



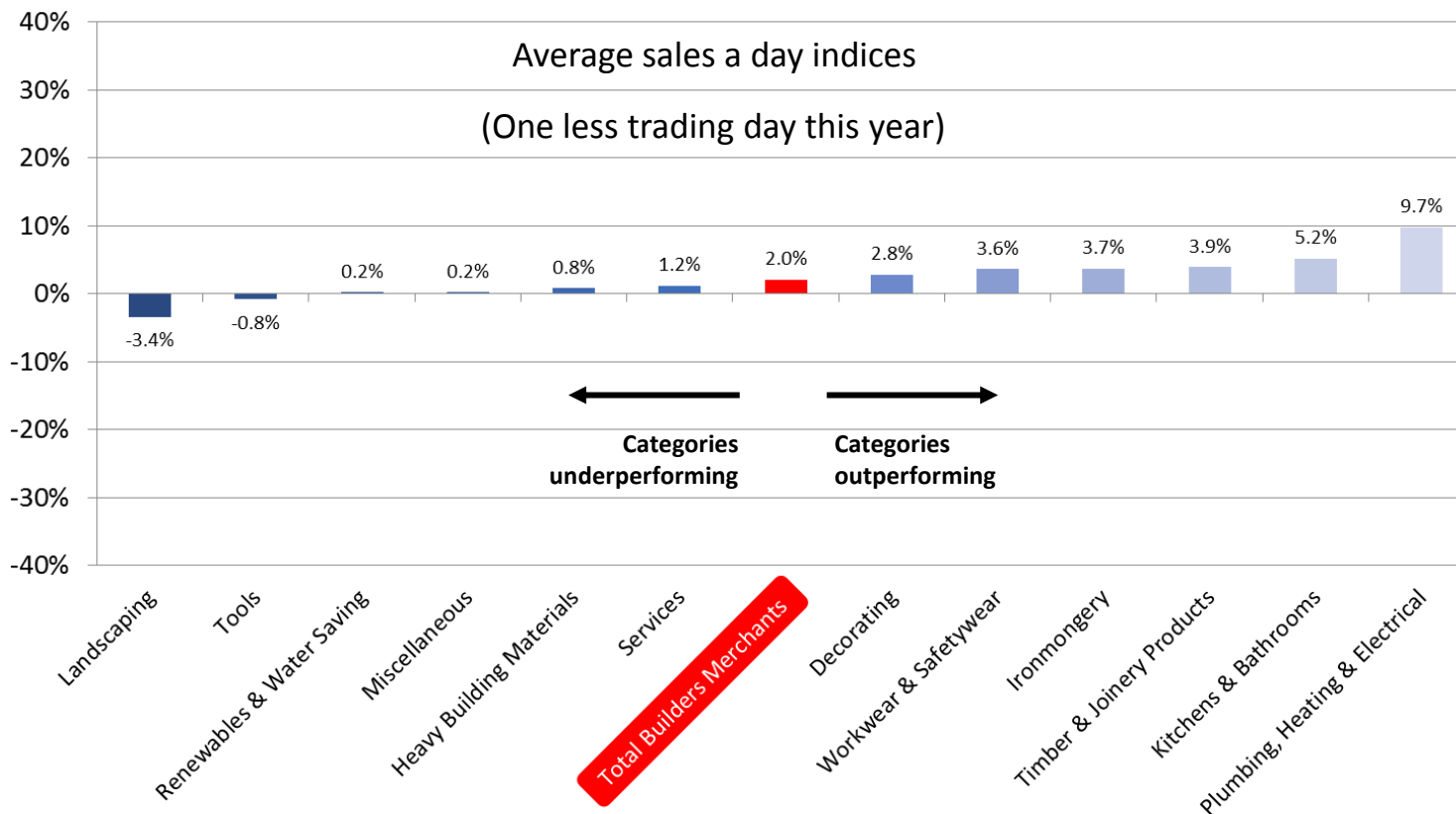
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2018

Quarterly: This Year v Last Year

Q1 2018 average sales a day indices



Quarter 1 2018 index v Quarter 1 2017 index



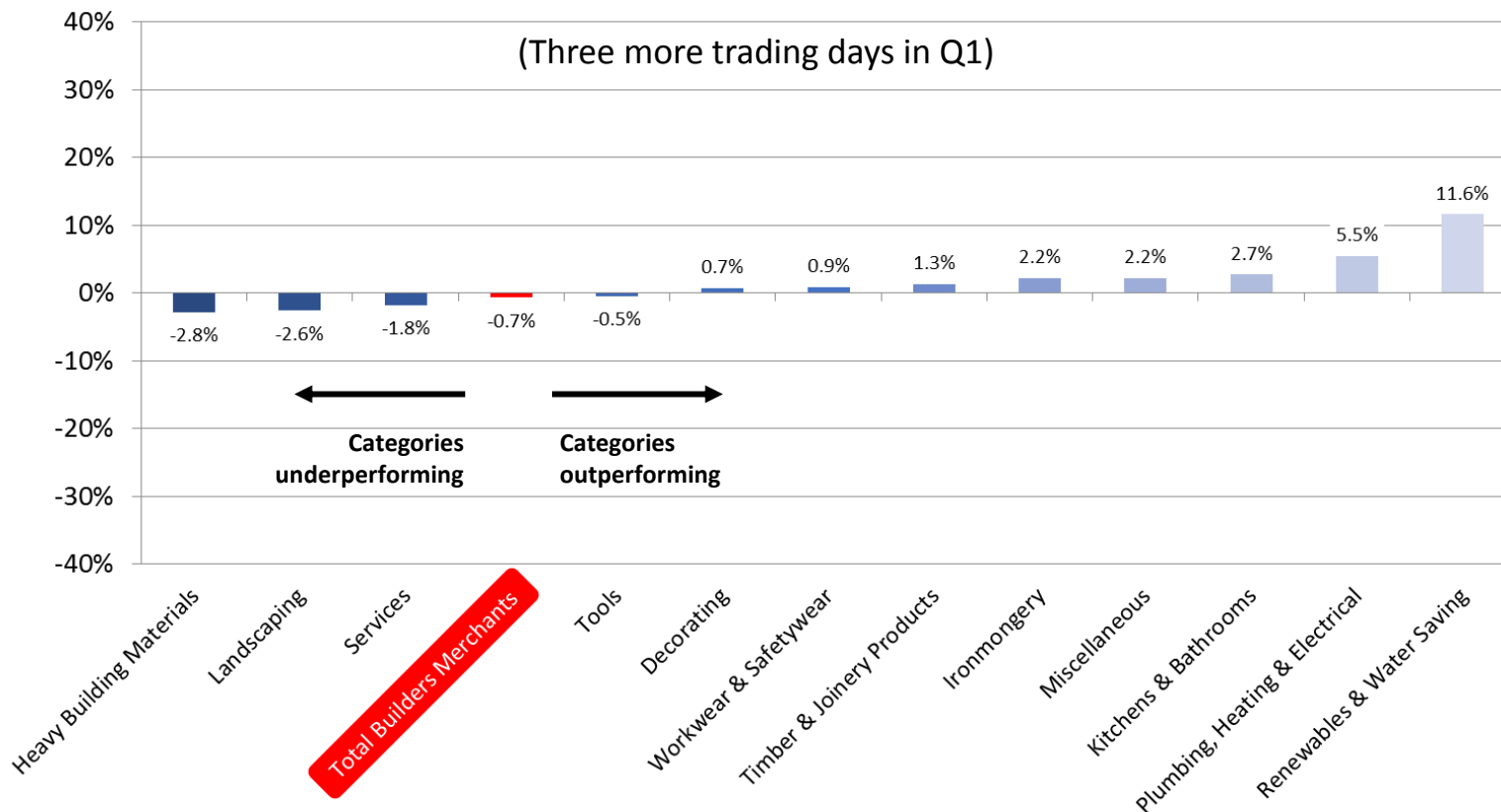
Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018

Quarterly: Quarter on Quarter

Q1 2018 sales indices

Quarter 1 2018 index v Quarter 4 2017 index

(Three more trading days in Q1)



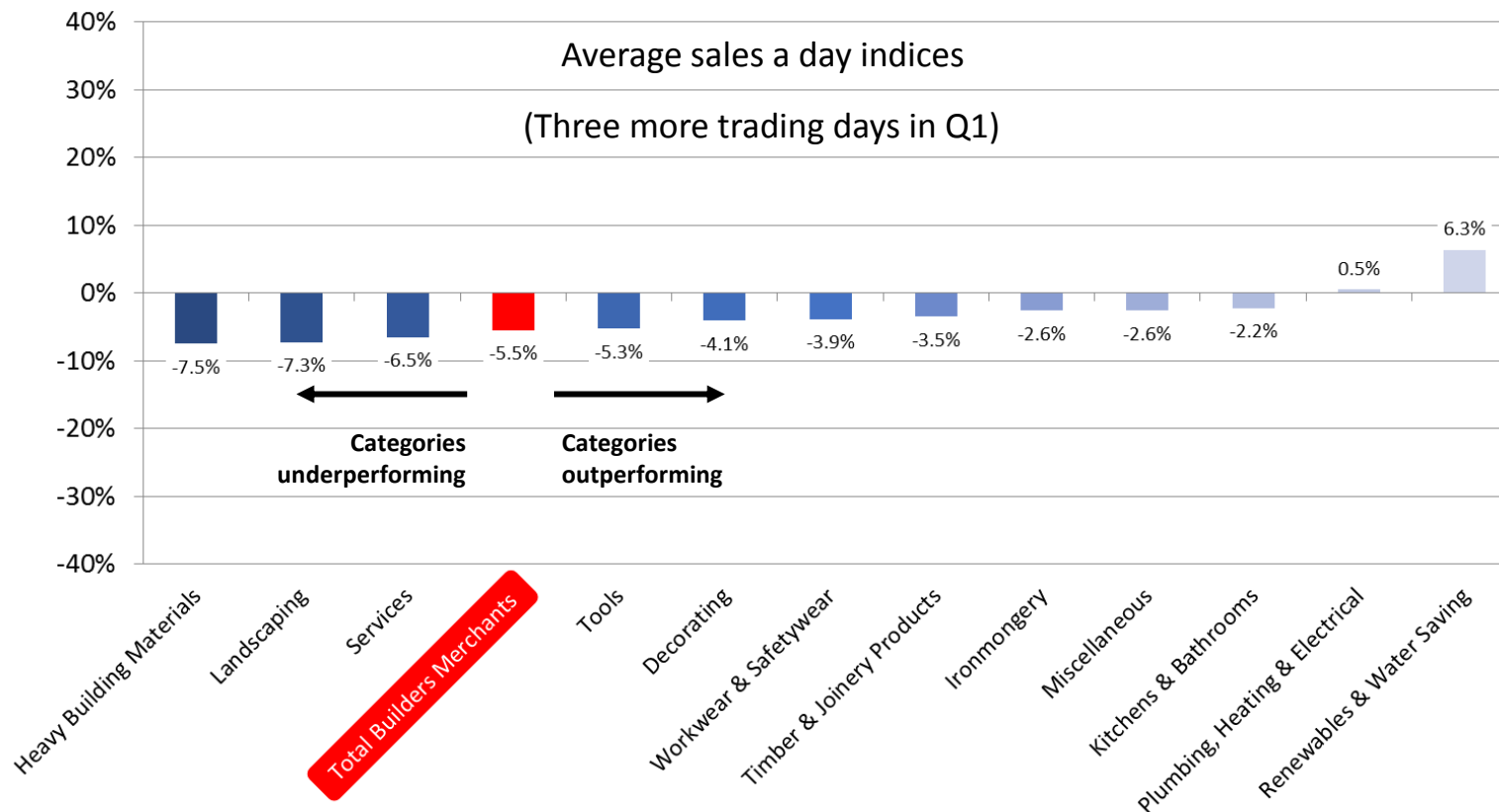
 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018

Quarterly: Quarter on Quarter

Q1 2018 average sales a day indices



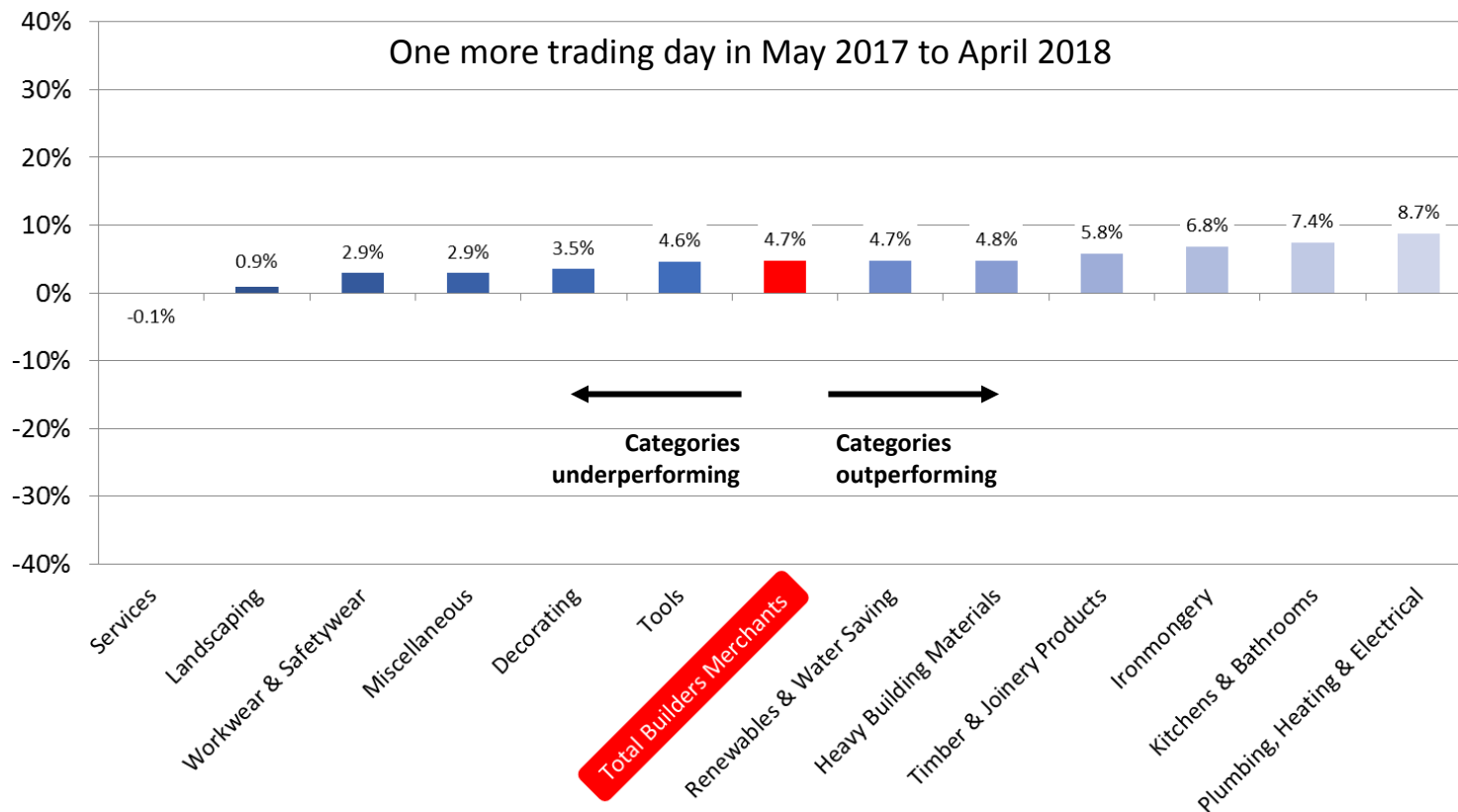
Quarter 1 2018 index v Quarter 4 2017 index



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

Last 12 Months: Year on Year

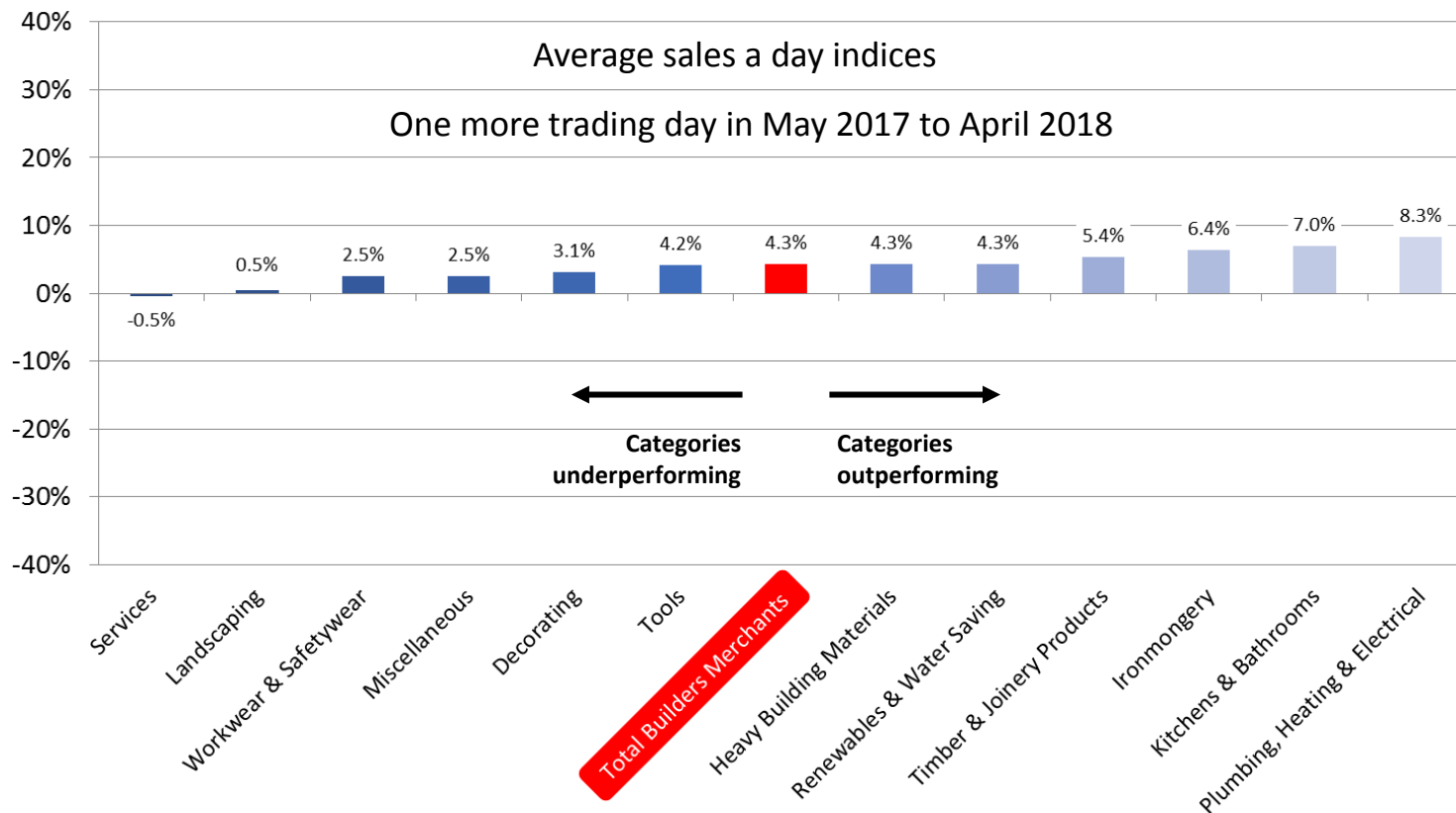
12 months May 17 to Apr 18 v 12 months May 16 to Apr 17



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

Last 12 Months: Year on Year average sales a day

12 months May 17 to Apr 18 v 12 months May 16 to Apr 17

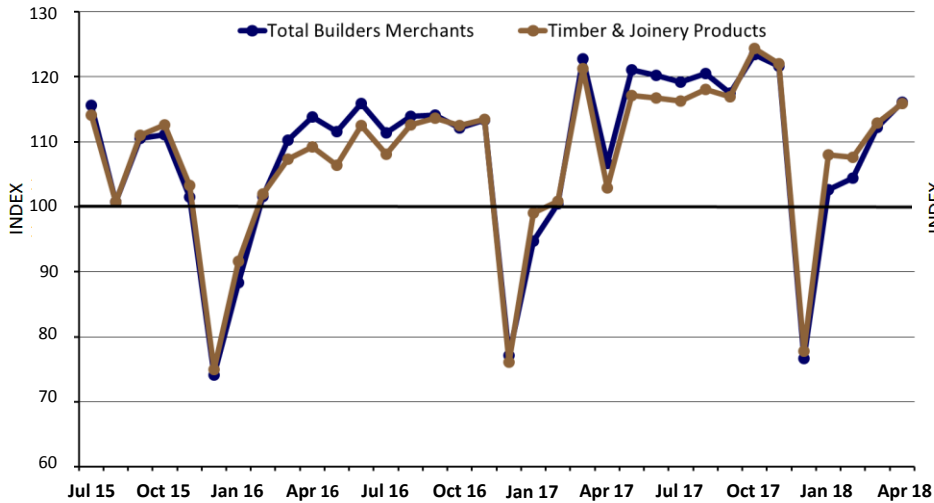


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2018

Monthly: Indices

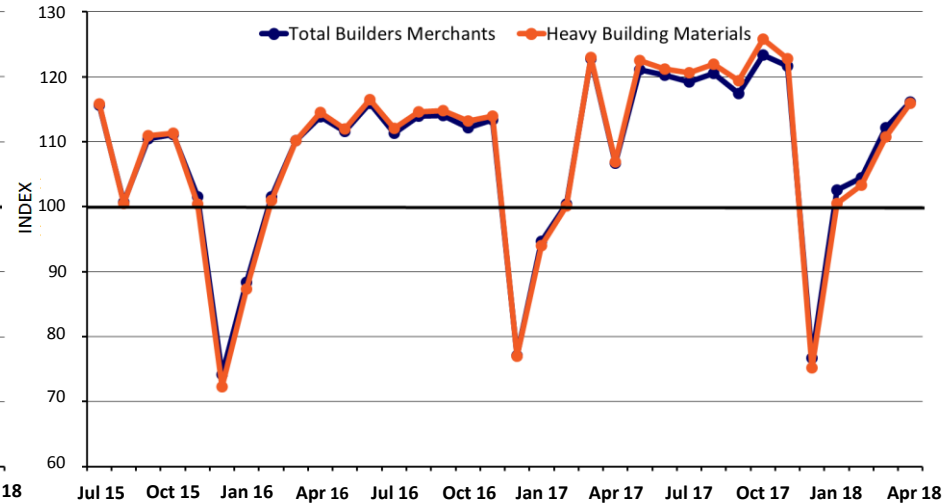
April 2018

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



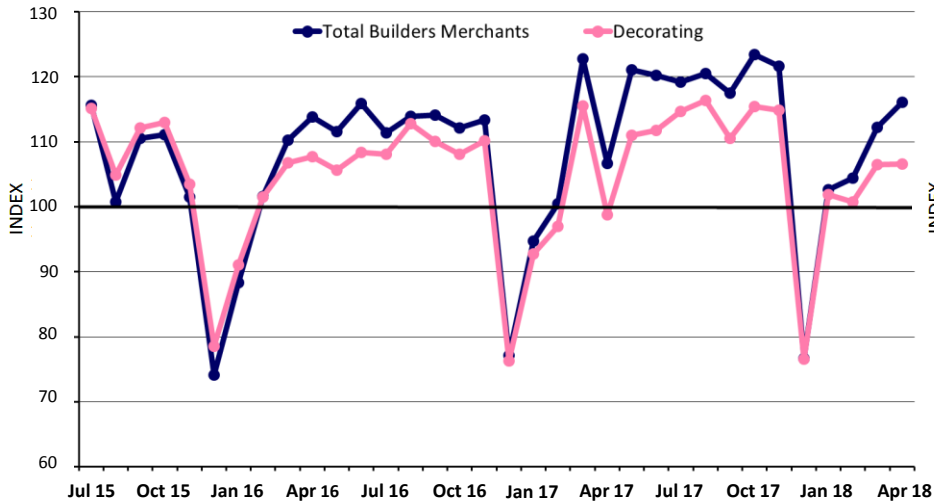
Indexed on July 2014 – June 2015

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

Monthly: Indices

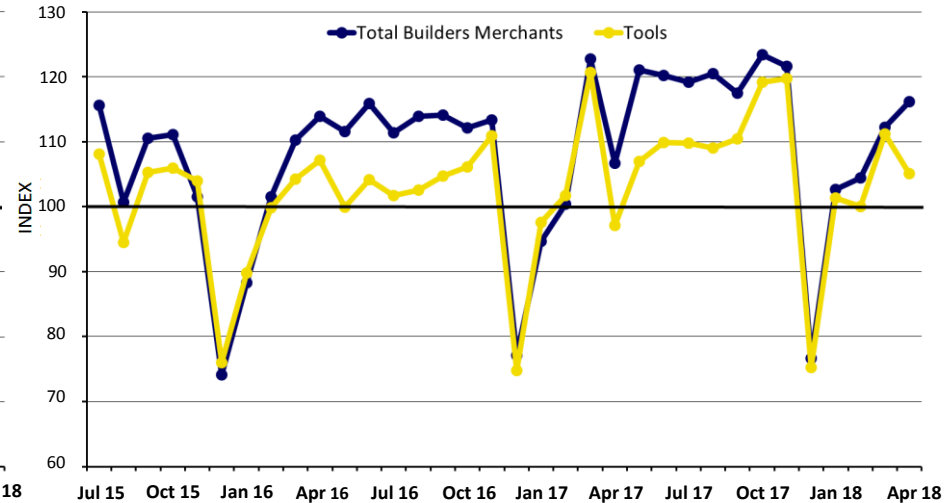
April 2018

Decorating



Indexed on July 2014 – June 2015

Tools



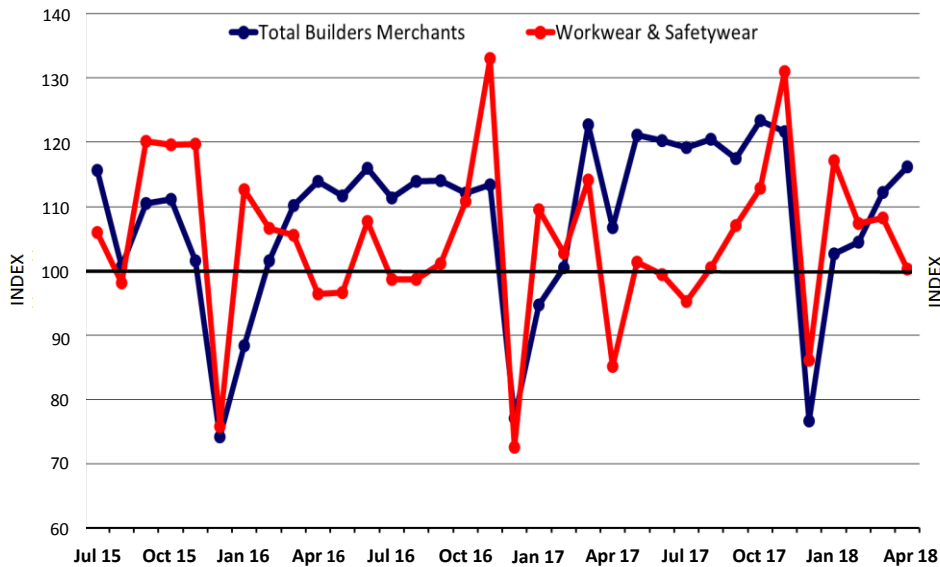
Indexed on July 2014 – June 2015

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

Monthly: Indices

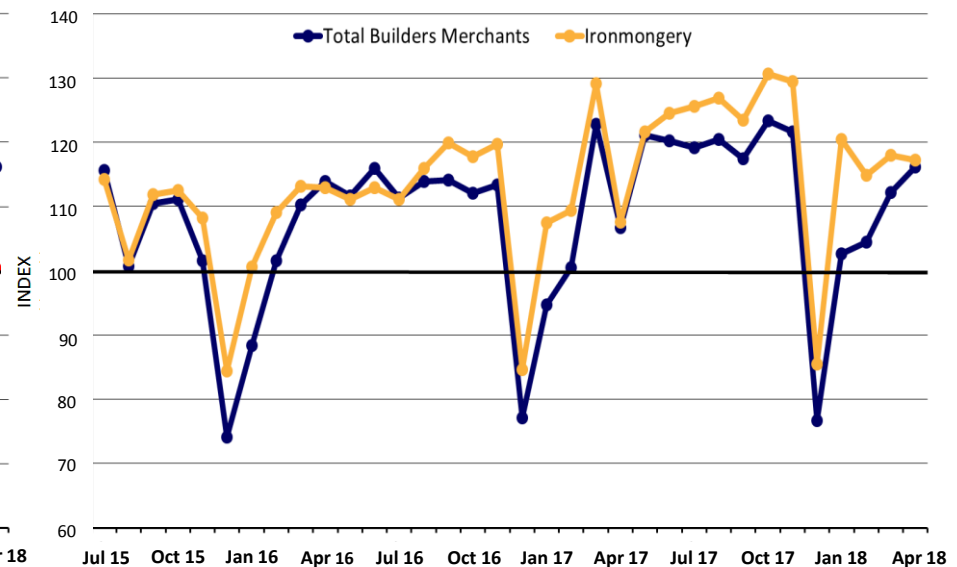
April 2018

Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery

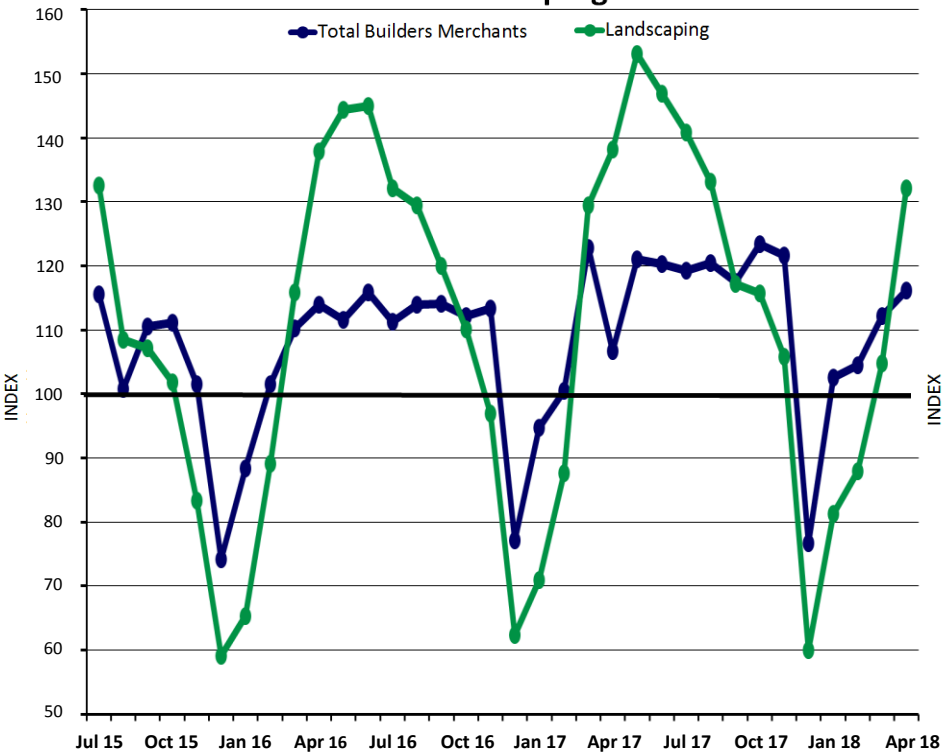


Indexed on July 2014 – June 2015

Monthly: Indices

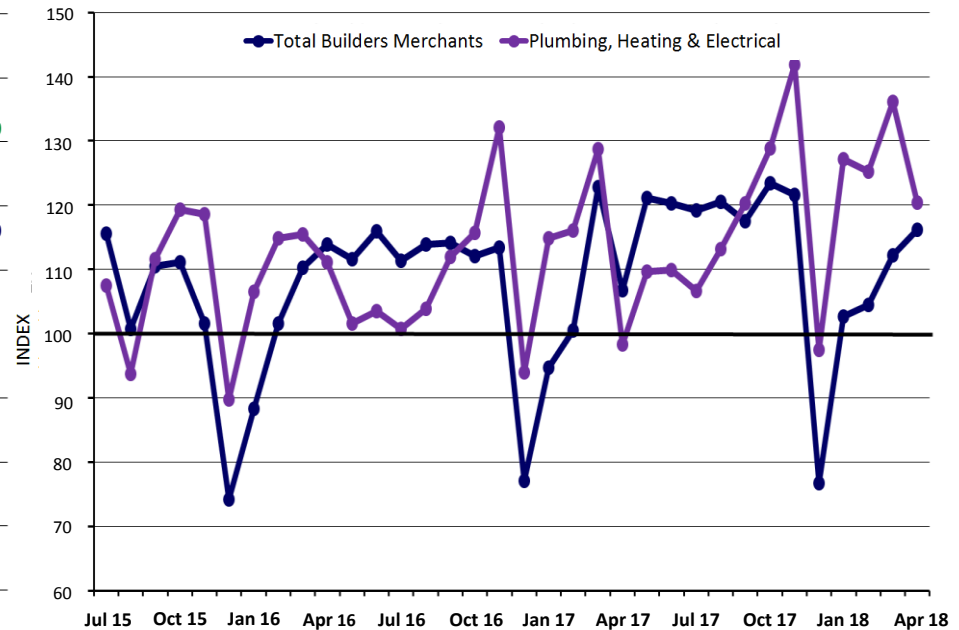
April 2018

Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



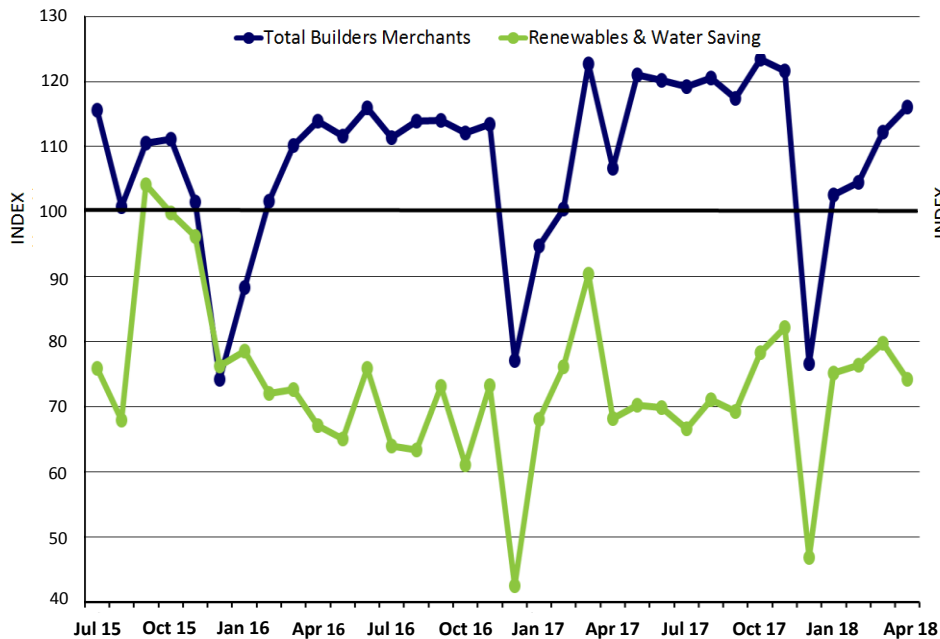
Indexed on July 2014 – June 2015

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

Monthly: Indices

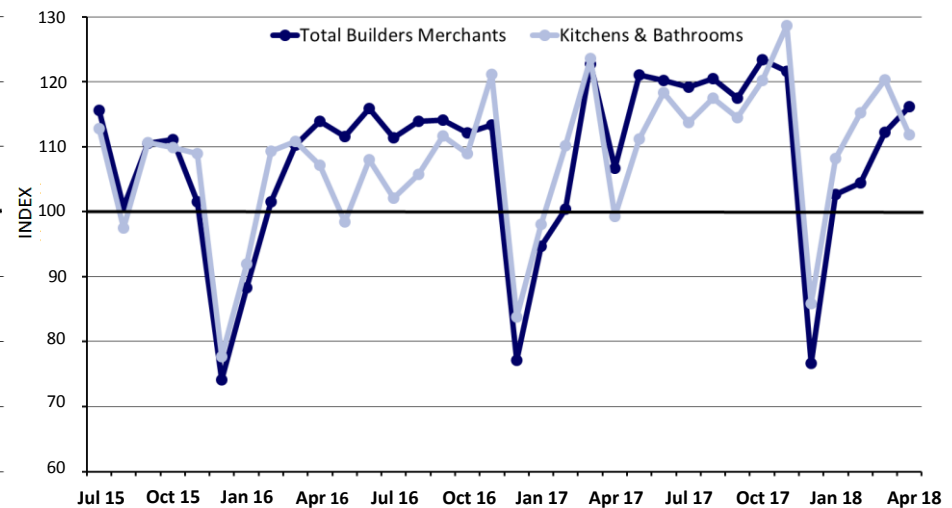
April 2018

Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



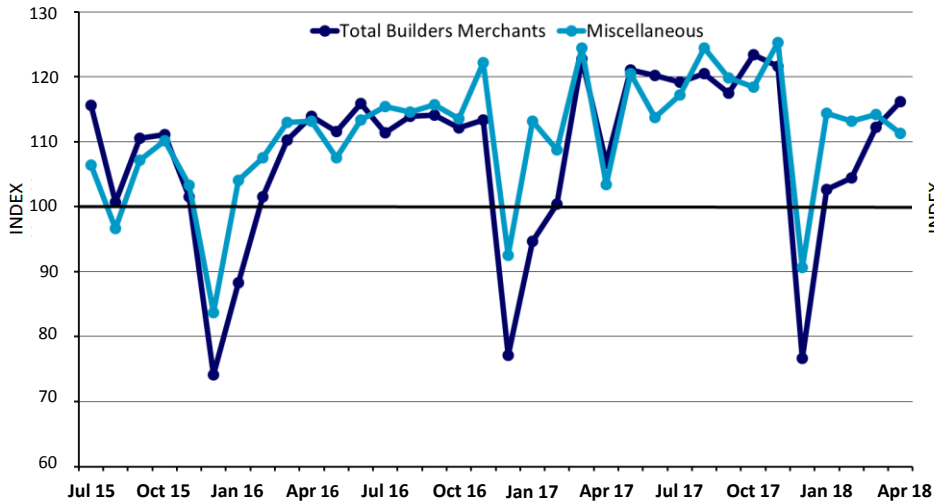
Indexed on July 2014 – June 2015

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

Monthly: Indices

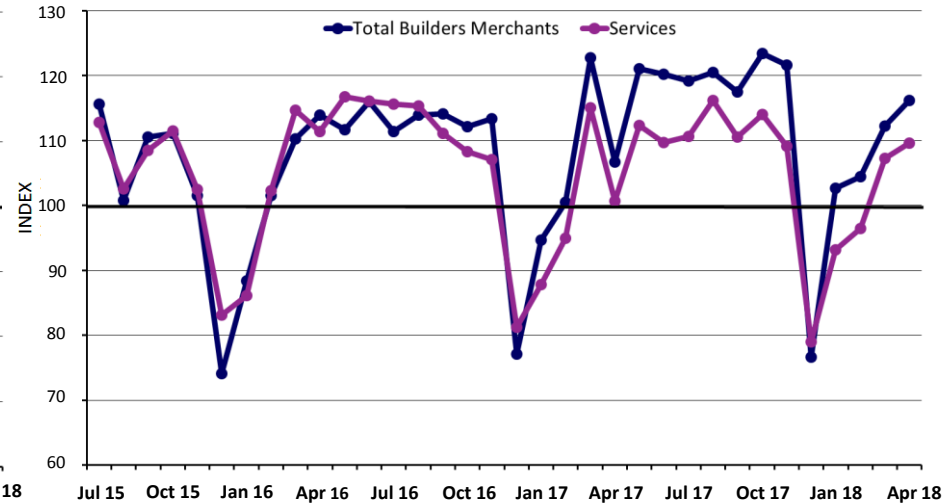
April 2018

Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

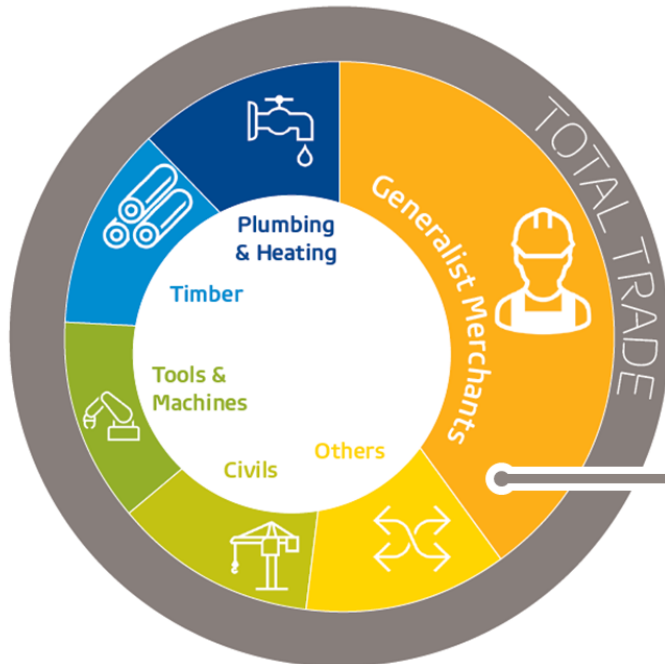
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2018

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

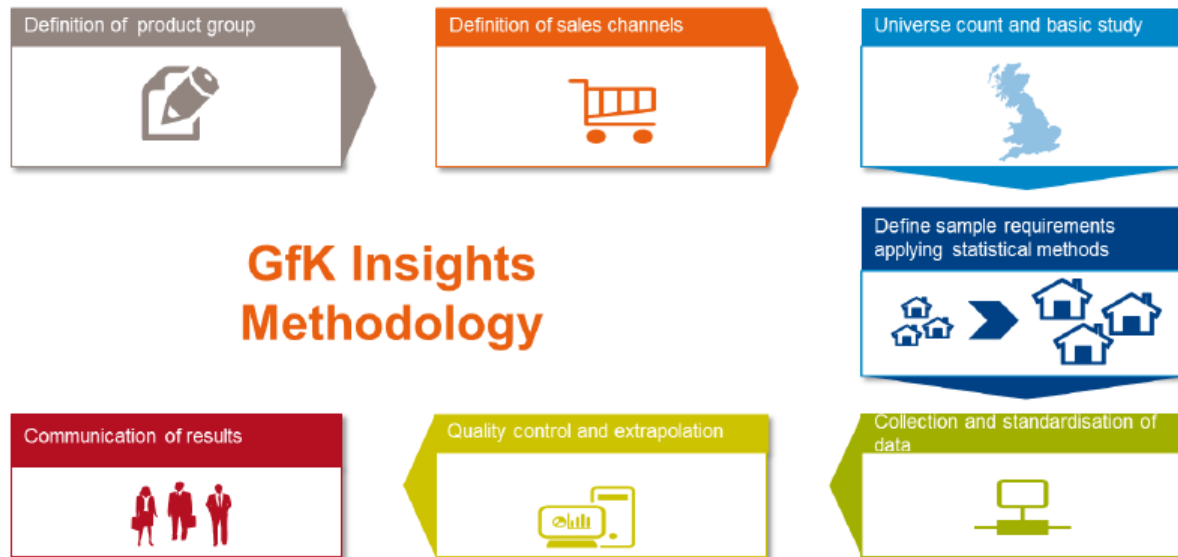
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

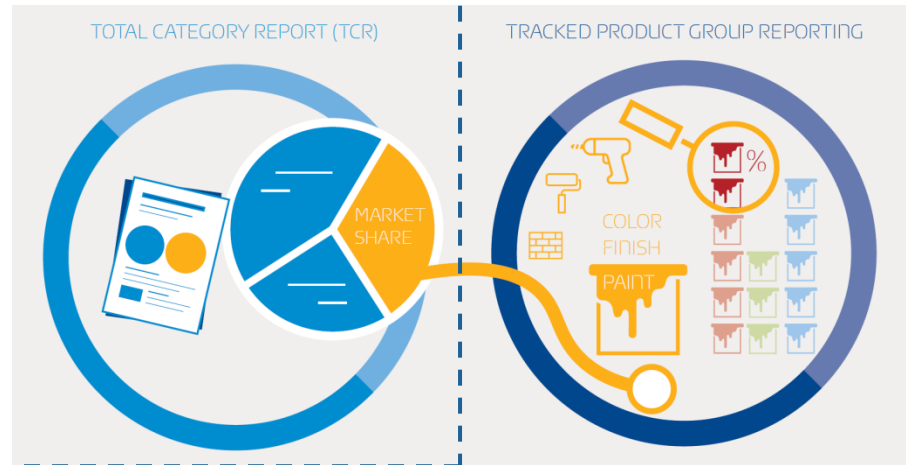
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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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