

“one **industry**  
one **voice**”

# Builders Merchant Building Index



Monthly report for May 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**

**Heavy Building Materials**

**Heavy Building Materials - Quarterly**

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

**Macro factors impacting Merchants**

**New house builds**  
Quarterly

**Expert Panel**  
**Mineral Wool Insulation**  
(Part of Heavy Building Materials)

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

**"The fire safety performance of buildings remains a focus and top priority for the industry. Non-combustible products are becoming more standard - they increase effectiveness, reliability and resilience in case of a fire."**

# 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](mailto: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](http://www.bmbi.co.uk). Follow us and the Experts [@theBMBI](https://twitter.com/theBMBI).

# Overview

## A solid May for Merchants

### Year on year

Total Builders Merchant value sales were up 6.9% in May compared with May last year. Five categories did better, with Plumbing Heating & Electrical (11.9%) the top performer and Landscaping (+11.3%), Timber & Joinery Products (+8.2%) and Kitchens & Bathrooms (7.1%) also stronger. Heavy Building Materials, the largest category, grew more slowly (+5.1%) and only Workwear & Safetywear sold less (-5.3%).

### Month on month

Overall sales in May were 11.4% higher than in April, helped by one extra trading day. Seasonal category, Landscaping (+29.0%) did best, with its third consecutive significant month-on-month increase. Heavy Building Materials improved 11.1% and ten of the twelve categories sold more.

Average sales a day in May were 6.1% higher than April.

### Other periods

The first five months of 2018 were up 3.5% on the same period in 2017, with one additional trading day this year. Plumbing Heating & Electrical (+11.3%) did best, with Kitchens & Bathrooms (+6.0%), Timber & Joinery Products (+5.5%) and Ironmongery (+3.7%) also performing well. Average sales a day for January to May were up 2.5% on the same months last year.

The rolling 12 months June 2017 to May 2018 were 4.6% above the same period a year earlier. Plumbing Heating & Electrical (+9.0%) was strongest and all categories sold more.

### Index

May's BMBI index was 129.4, up from 116.1 in April. Landscaping was top (170.4) followed by Heavy Building Materials (128.7) and Timber & Joinery Products (126.7). Ten of the 12 categories exceeded 100.

Total Builders Merchant value sales were up 6.9% in May compared with May last year.

The first five months of 2018 were up 3.5% on the same period in 2017, with one extra trading day this year.

# 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](#)



**Paul Owen**  
Divisional Director Distribution  
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](#)

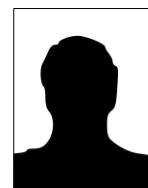


**Paul Roughan**  
Trade Merchants Sales Director  
Dulux Trade

**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

## May 2017\* – May 2018

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



MONTHLY SALES VALUE INDEX	Index	2017								2018				
		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
<b>Total Builders Merchants</b>	<b>100</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>	<b>76.7</b>	<b>102.6</b>	<b>104.5</b>	<b>112.2</b>	<b>116.1</b>	<b>129.4</b>
Timber & Joinery Products	100	117.1	116.7	116.3	117.3	116.9	124.4	122.1	77.8	108.0	107.6	112.9	115.9	126.7
Heavy Building Materials	100	122.5	121.2	120.6	121.6	119.4	125.8	122.8	75.2	100.5	103.3	110.8	115.9	128.7
Decorating	100	111.0	111.8	114.6	115.6	110.5	115.4	114.9	76.6	101.9	100.8	106.5	106.6	117.0
Tools	100	107.0	109.9	109.8	110.8	110.4	119.2	119.8	75.3	101.3	100.0	111.2	105.1	110.5
Workwear & Safetywear	100	101.4	99.4	95.2	96.2	107.0	112.9	131.0	86.1	117.2	107.3	108.3	100.2	96.0
Ironmongery	100	121.6	124.5	125.6	126.6	123.4	130.6	129.5	85.5	120.4	114.8	118.0	117.3	125.7
Landscaping	100	153.1	146.9	140.8	141.8	117.1	115.8	105.8	60.0	81.3	88.0	104.8	132.1	170.4
Plumbing, Heating & Electrical	100	109.7	110.0	106.6	107.6	120.3	128.9	141.9	97.4	127.2	125.2	136.1	120.4	122.7
Renewables & Water Saving	100	70.2	69.9	66.6	67.6	69.2	78.3	82.2	46.8	75.2	76.3	79.8	74.2	70.4
Kitchens & Bathrooms	100	111.3	118.3	113.7	114.7	114.5	120.2	128.6	85.9	108.2	115.2	120.3	111.9	119.2
Miscellaneous	100	120.5	113.7	117.2	118.2	119.8	118.4	125.3	90.7	114.4	113.2	114.2	111.3	120.5
Services	100	112.4	109.7	110.6	111.6	110.6	114.0	109.2	79.0	93.1	96.4	107.3	109.6	125.4

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

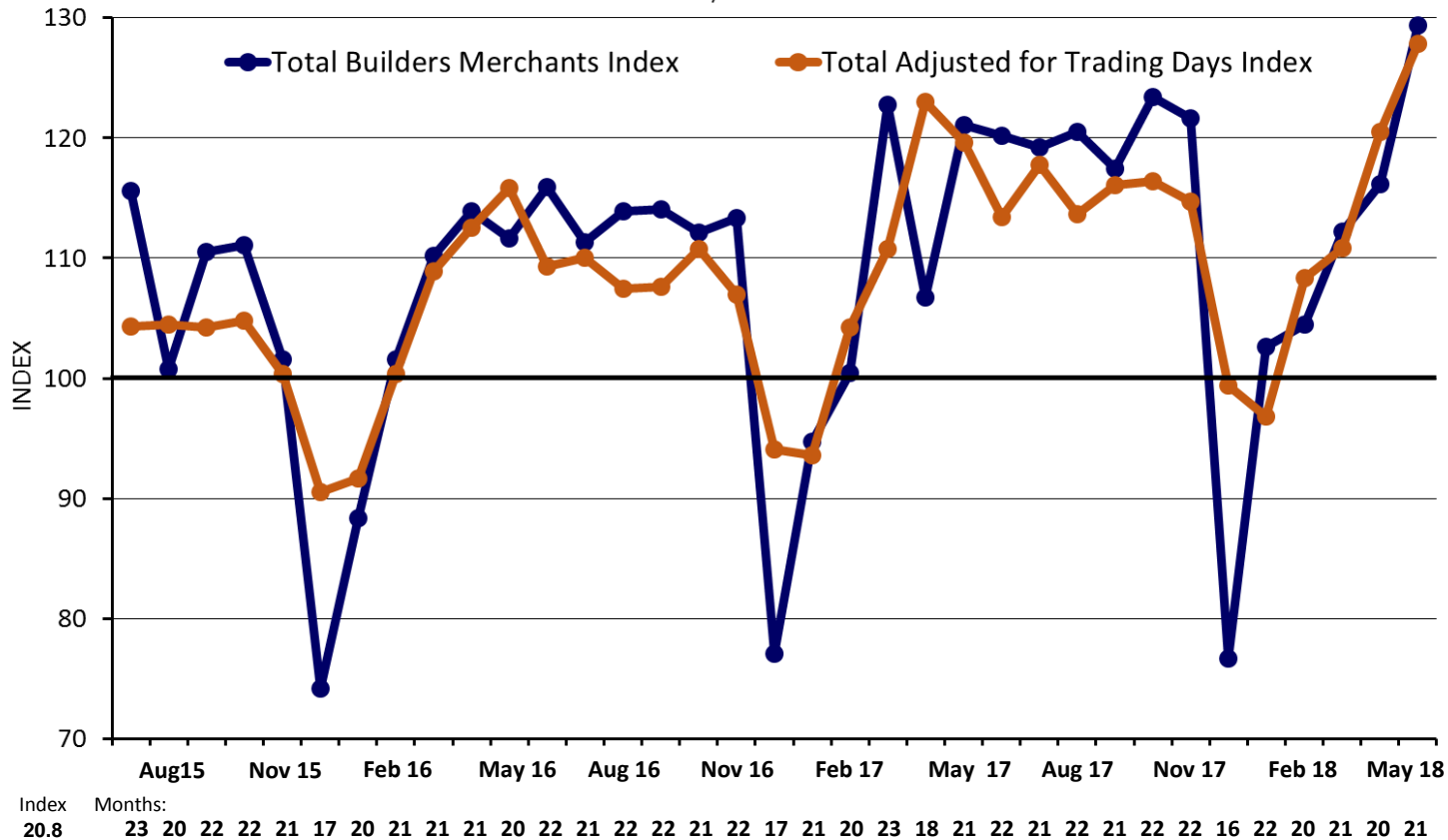
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to May 2018

# 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



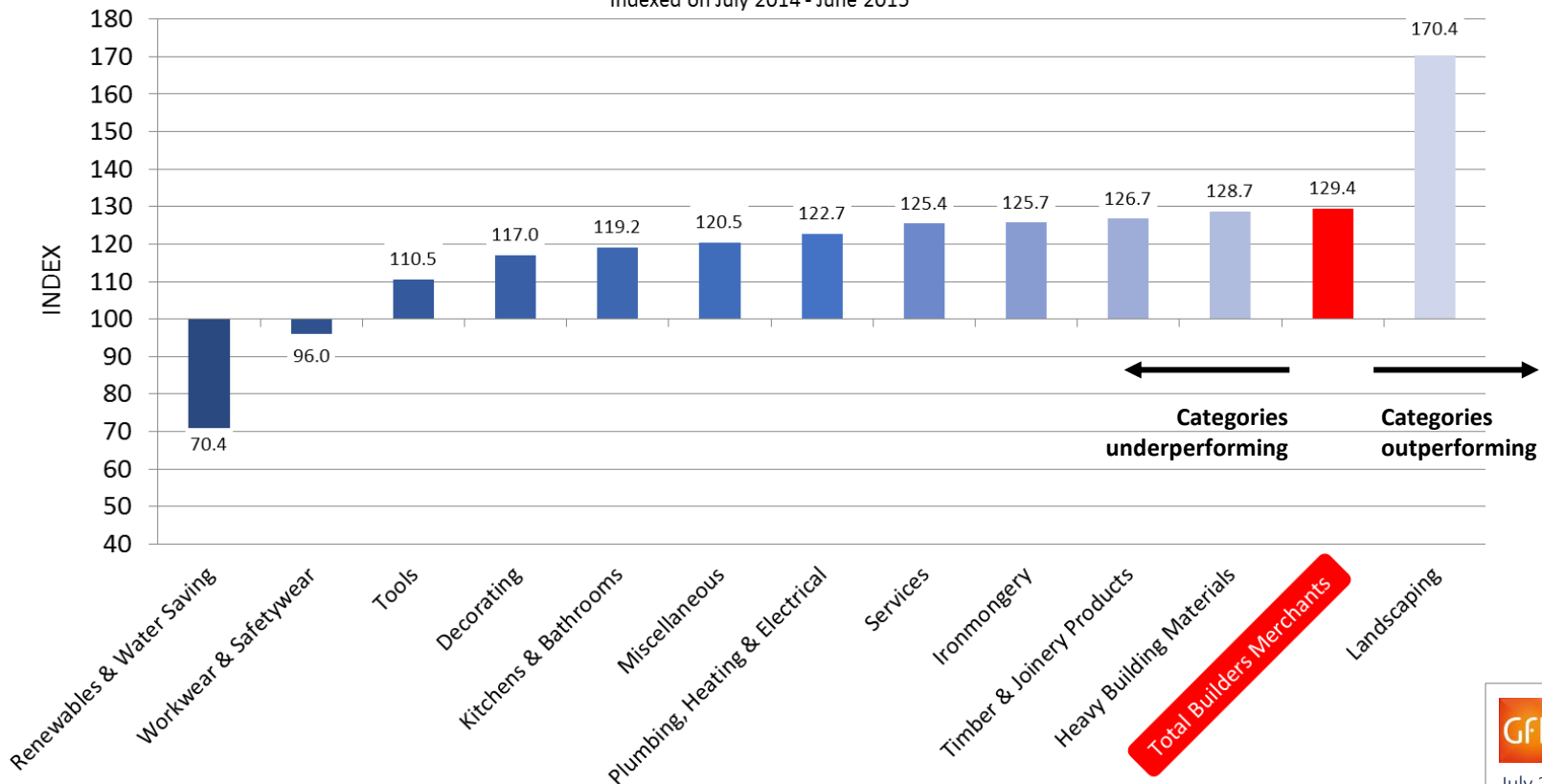
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to May 2018

# Monthly: Index and Categories

## May 2018 index

### May 2018 Index

Indexed on July 2014 - June 2015

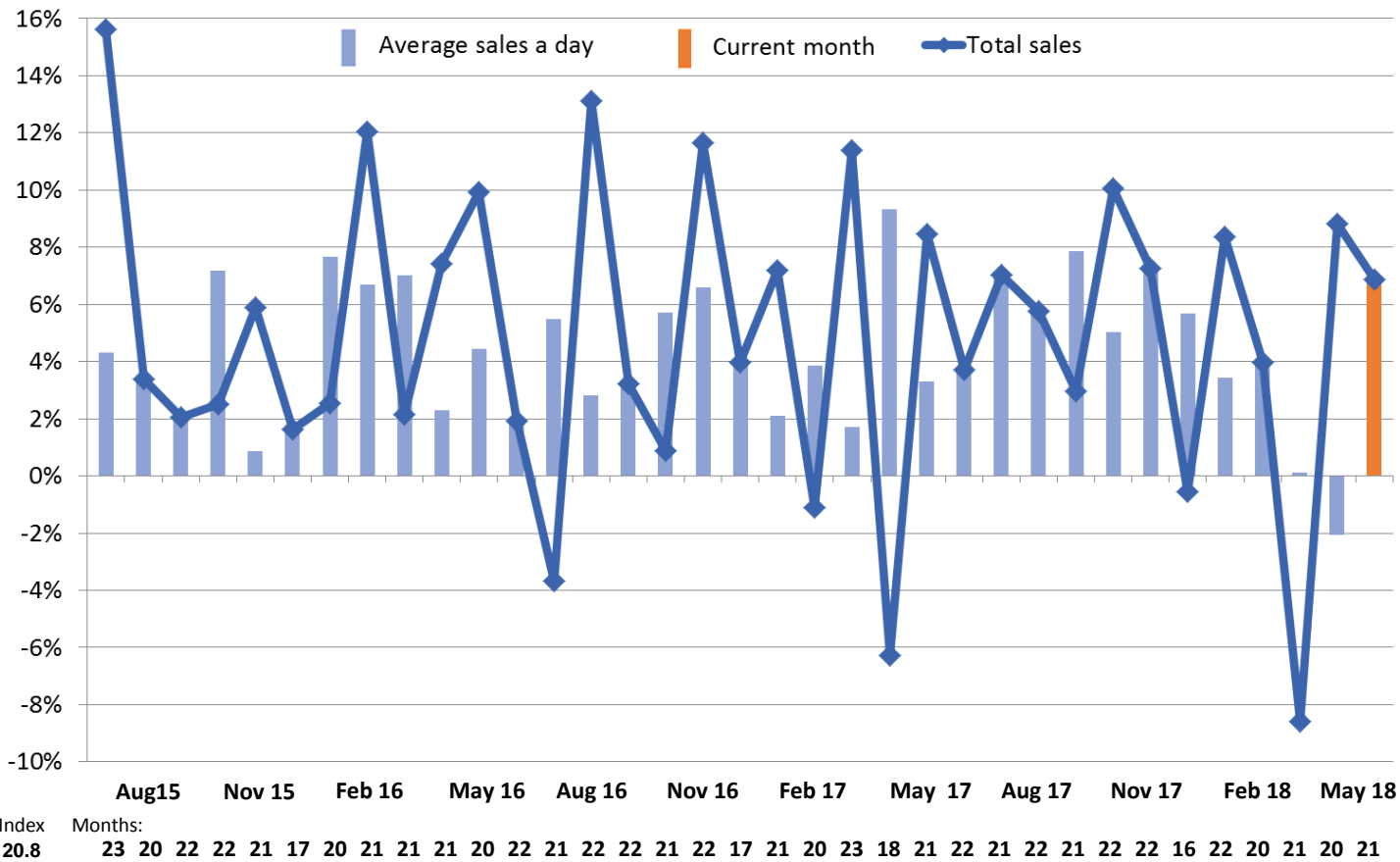


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to May 2018

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year



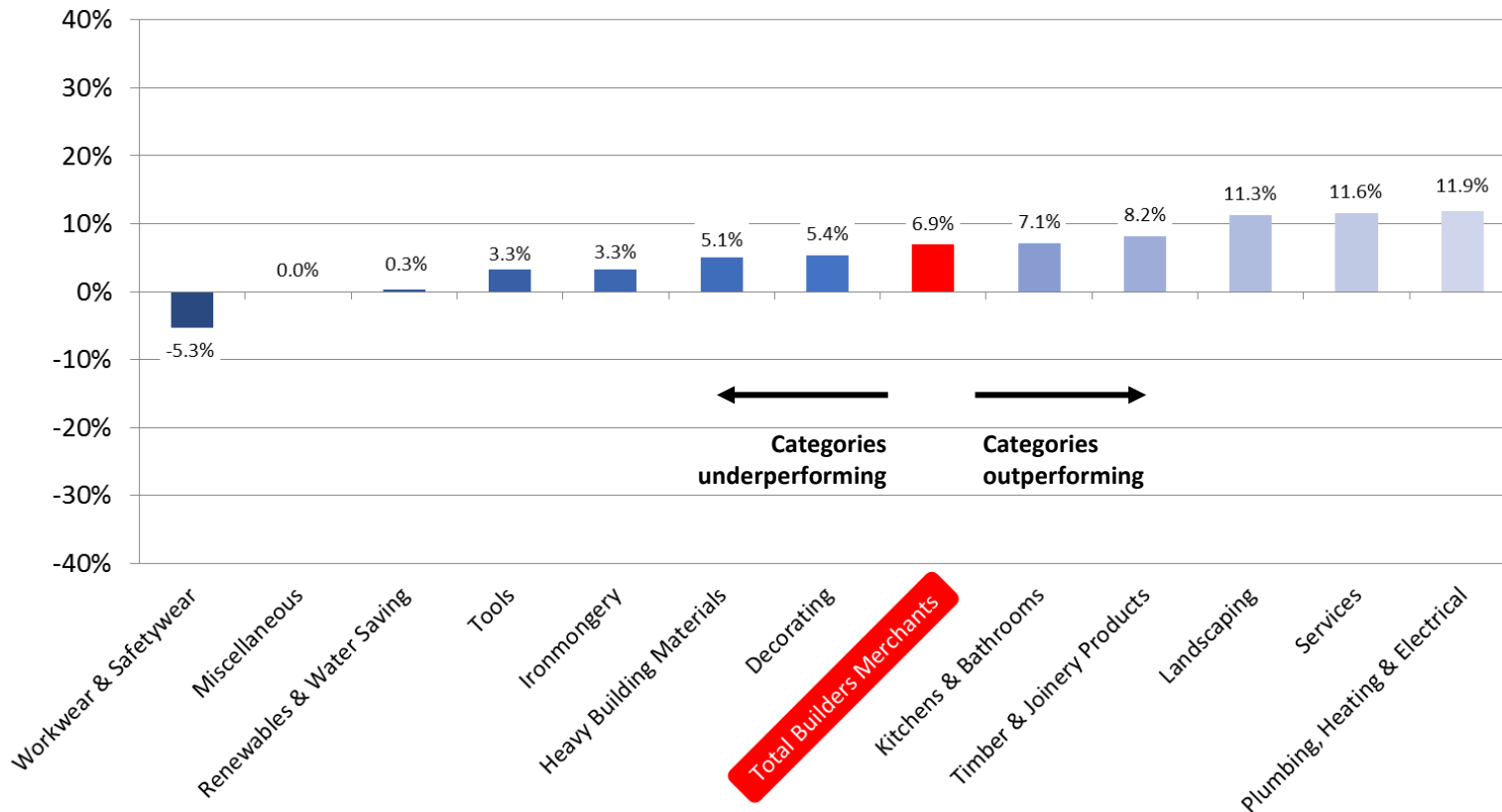
Trading days: Index Months: 20.8 23 20 22 22 21 17 20 21 21 21 20 22 21 22 22 21 22 17 21 20 23 18 21 22 21 22 21 22 22 16 22 20 21 20 21

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

# Monthly: This Year v Last Year

## May 2018 sales indices

### May 2018 index v May 2017 index

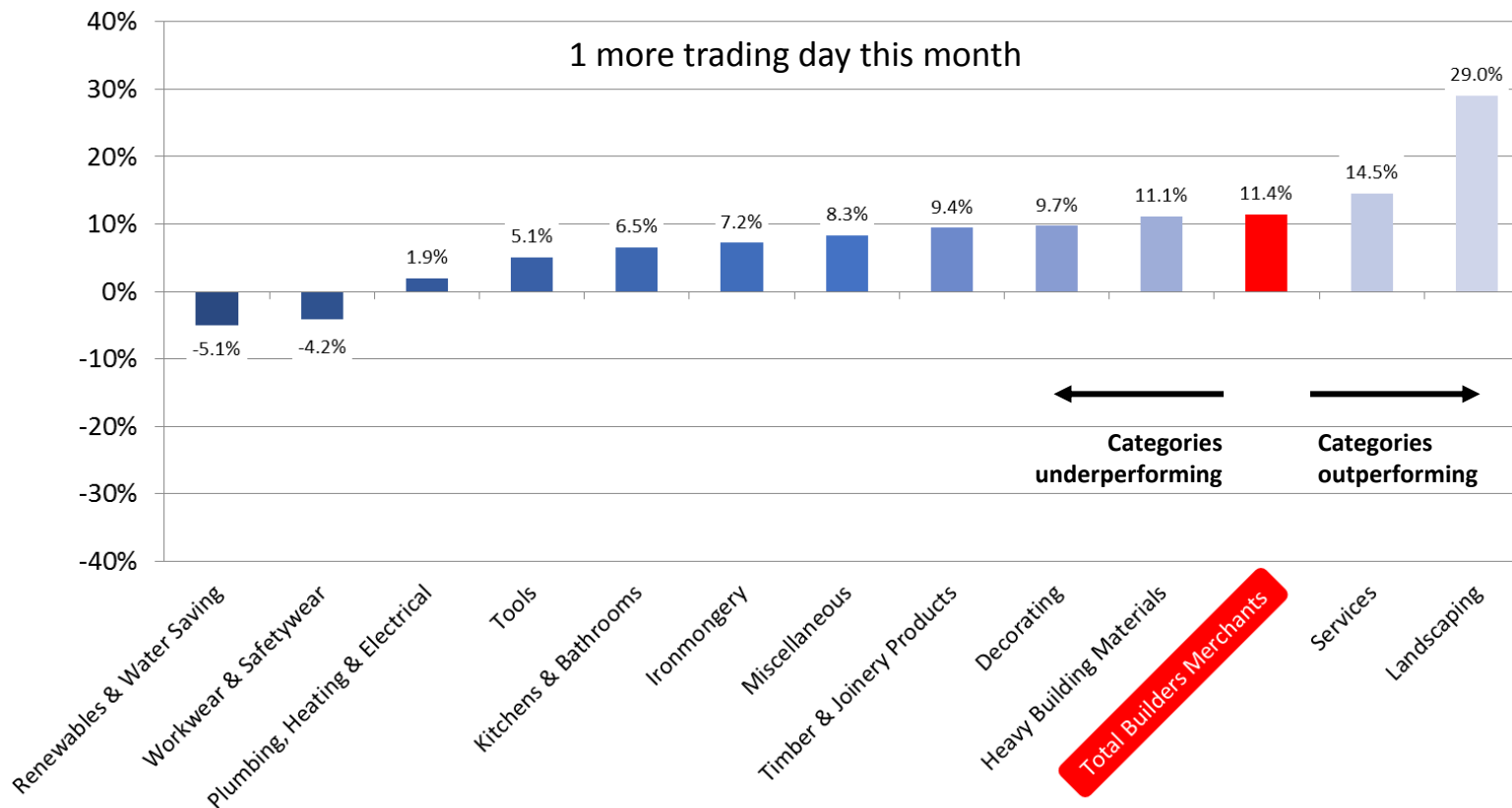


 Source: GfK's Builders Merchants Total Category Report July 2015 to May 2018

# Monthly: This Month v Last Month

## May 2018 sales indices

### May 2018 index v April 2018 index



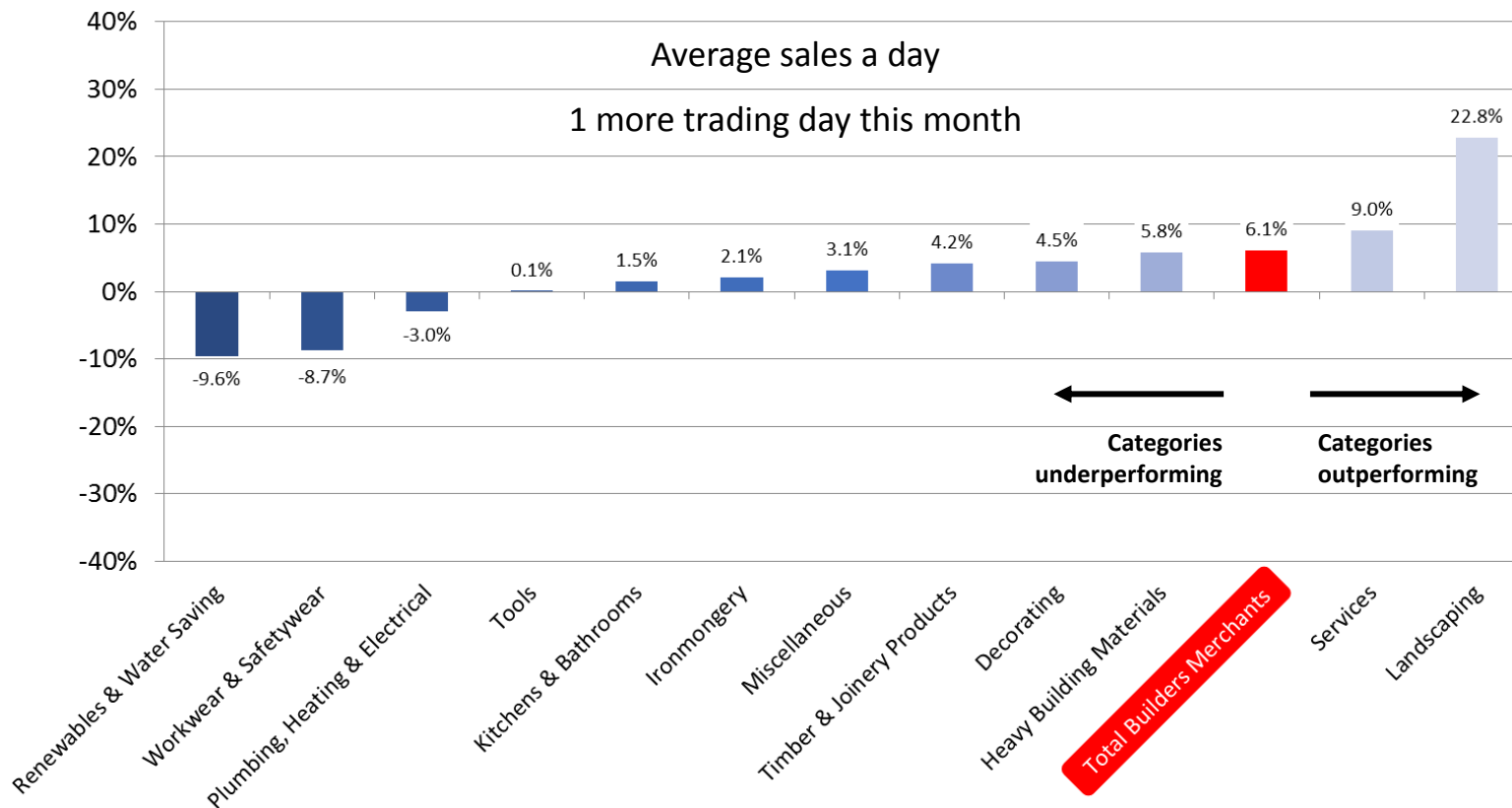
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to May 2018

# Monthly: This Month v Last Month

## May 2018 average sales a day indices



### May 2018 index v April 2018 index



 Source: GfK's Builders Merchants Total Category Report July 2015 to May 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
<b>Total Builders Merchants</b>	<b>100</b>	<b>106.0</b>	<b>116.0</b>	<b>119.1</b>	<b>107.2</b>	<b>106.4</b>
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

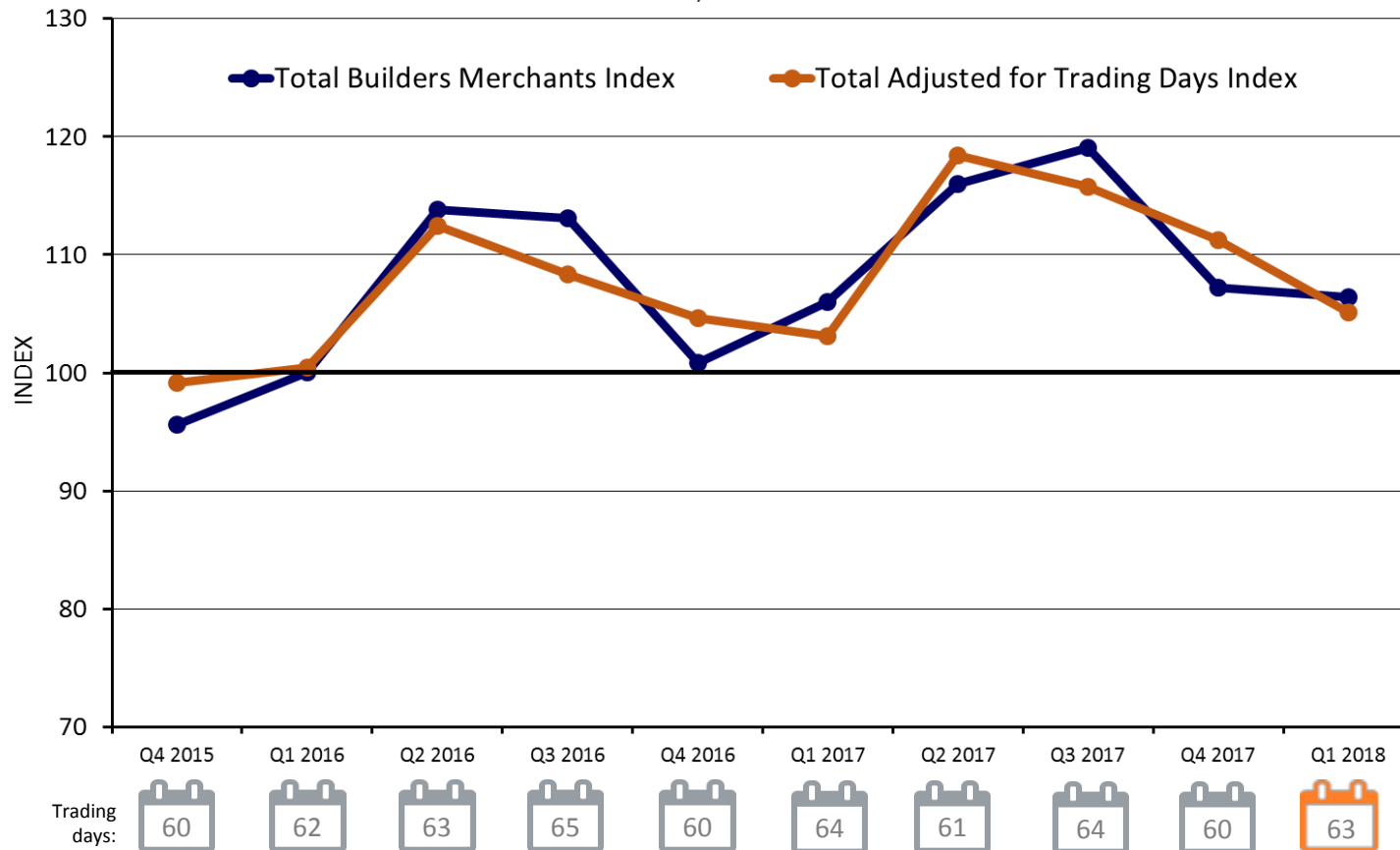


# Quarterly: Index

## Adjusted and unadjusted for trading days

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

Indexed on July 2014 - June 2015



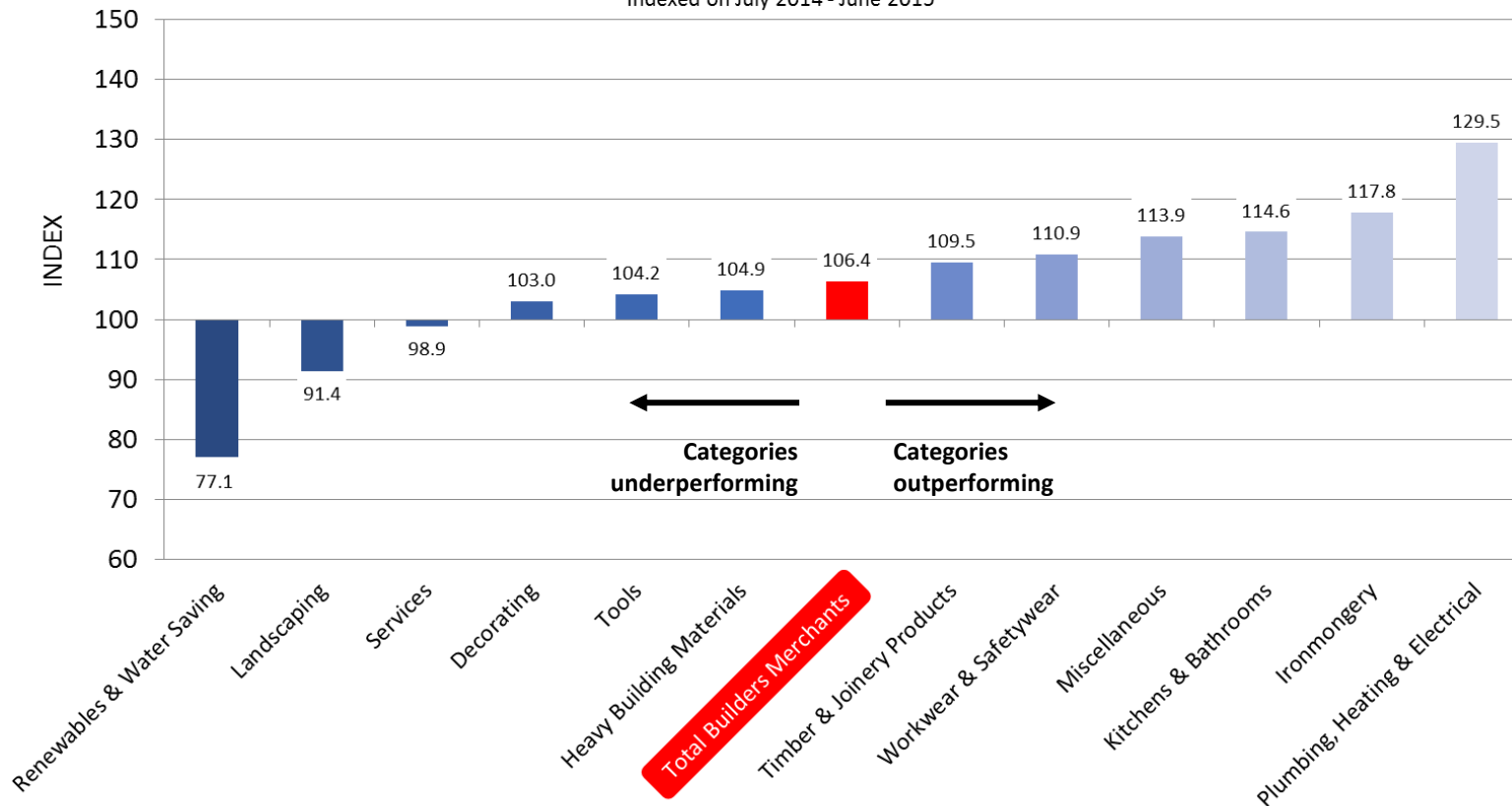
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2018

# Quarterly: Index and Categories

## Q1 2018 index

### Quarter 1 2018

Indexed on July 2014 - June 2015



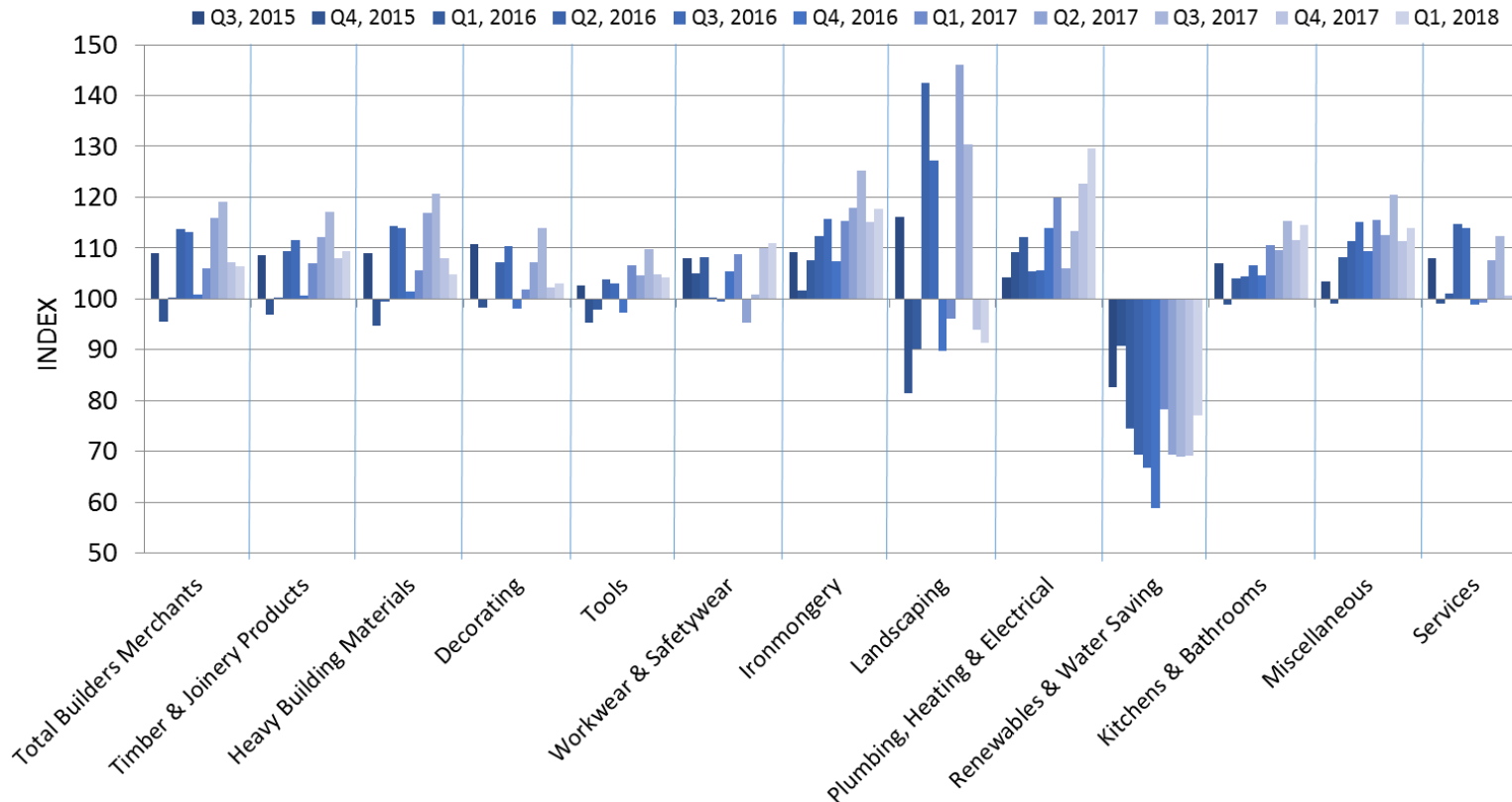
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2018

# Quarterly: Index and Categories

## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

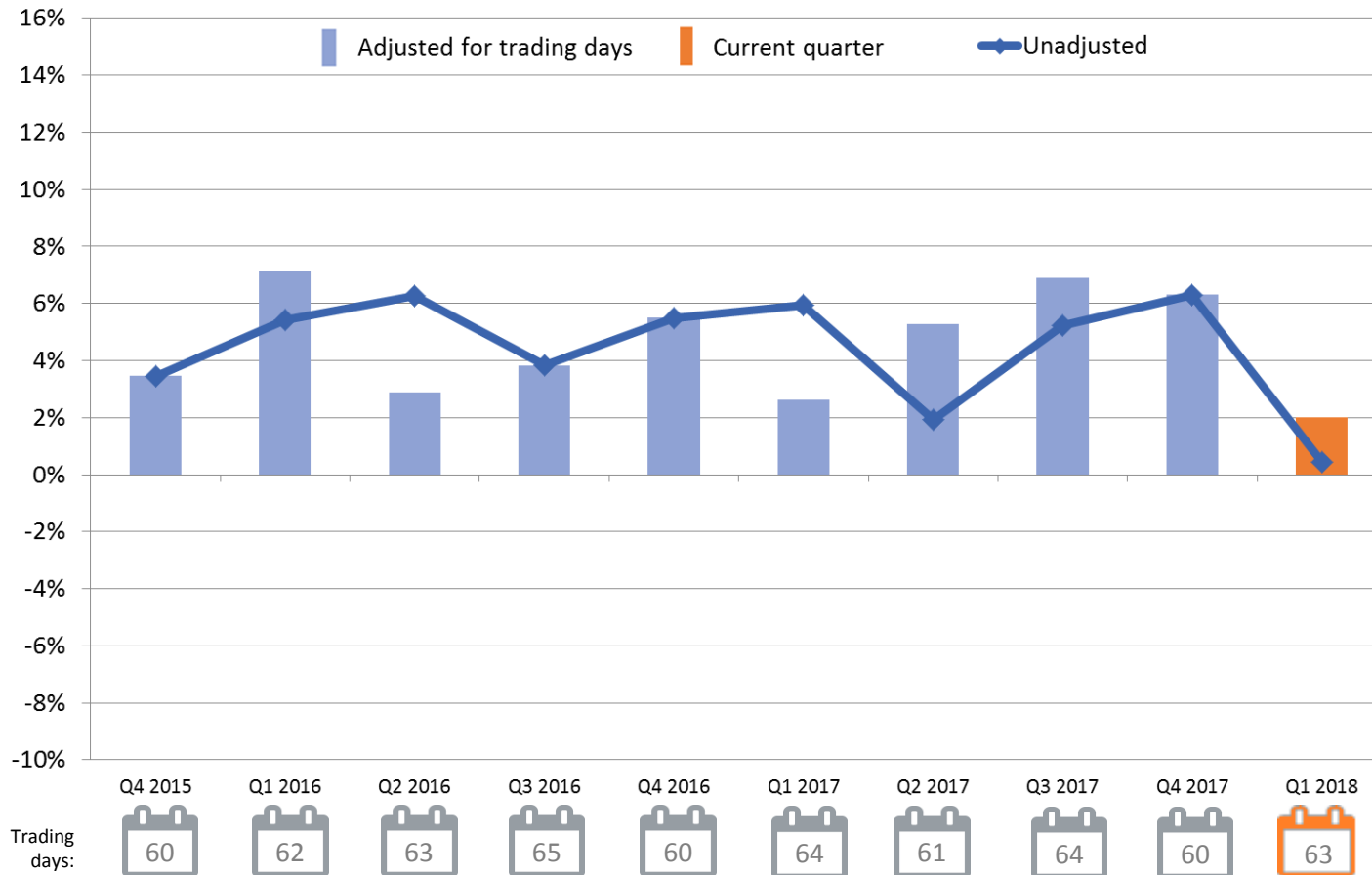


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2018

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

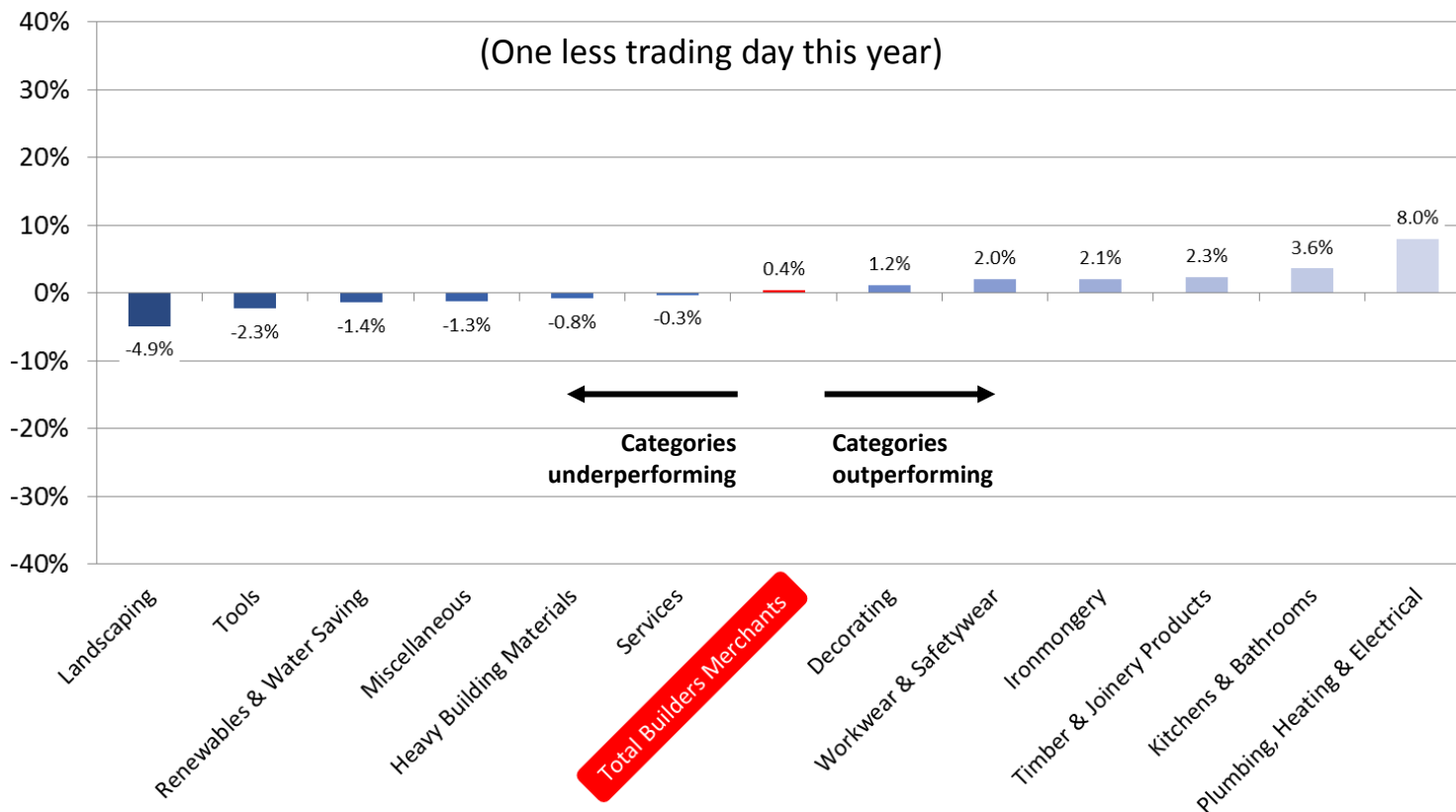


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2018

# Quarterly: This Year v Last Year

## Q1 2018 sales indices

### Quarter 1 2018 index v Quarter 1 2017 index

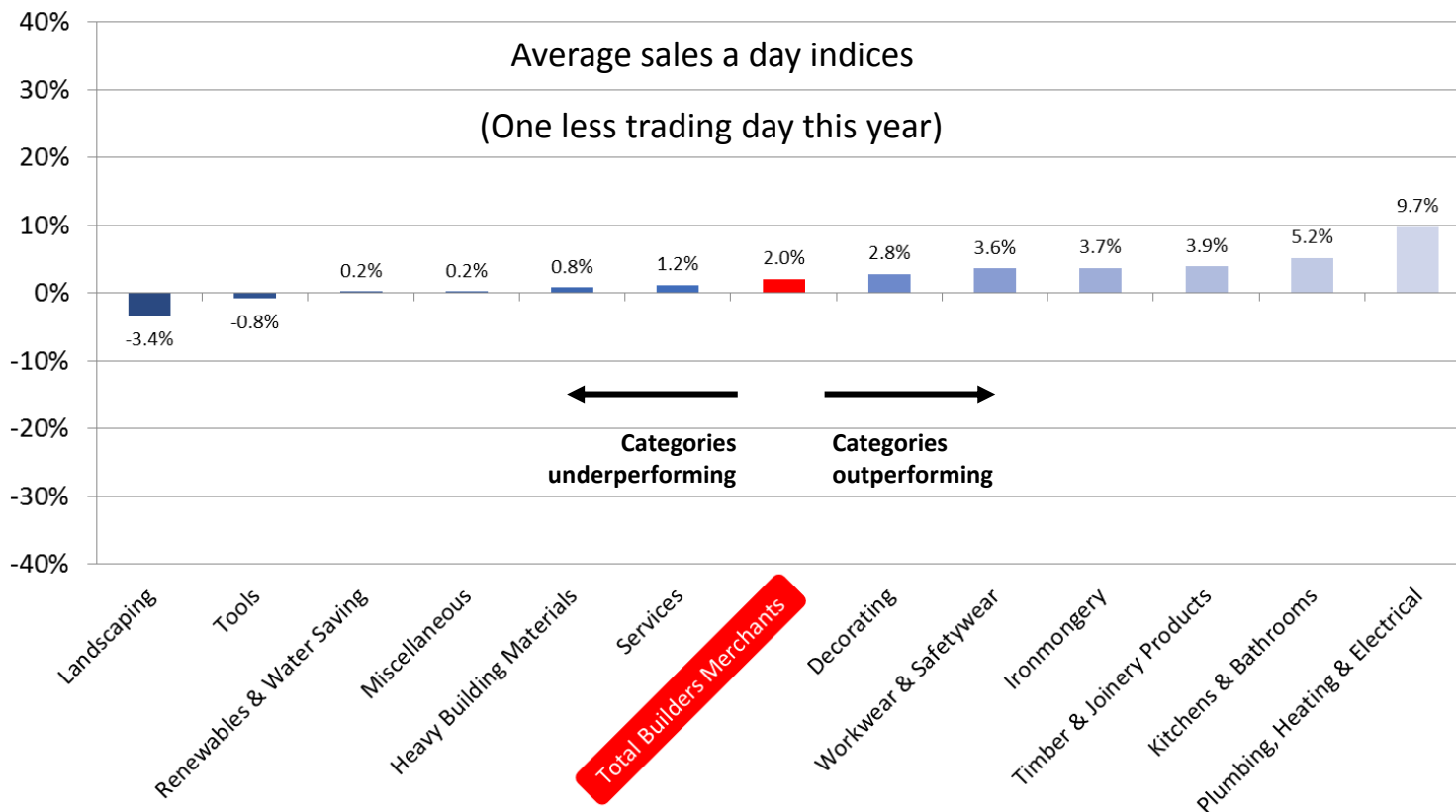


 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018

# Quarterly: This Year v Last Year

## Q1 2018 average sales a day indices

### Quarter 1 2018 index v Quarter 1 2017 index



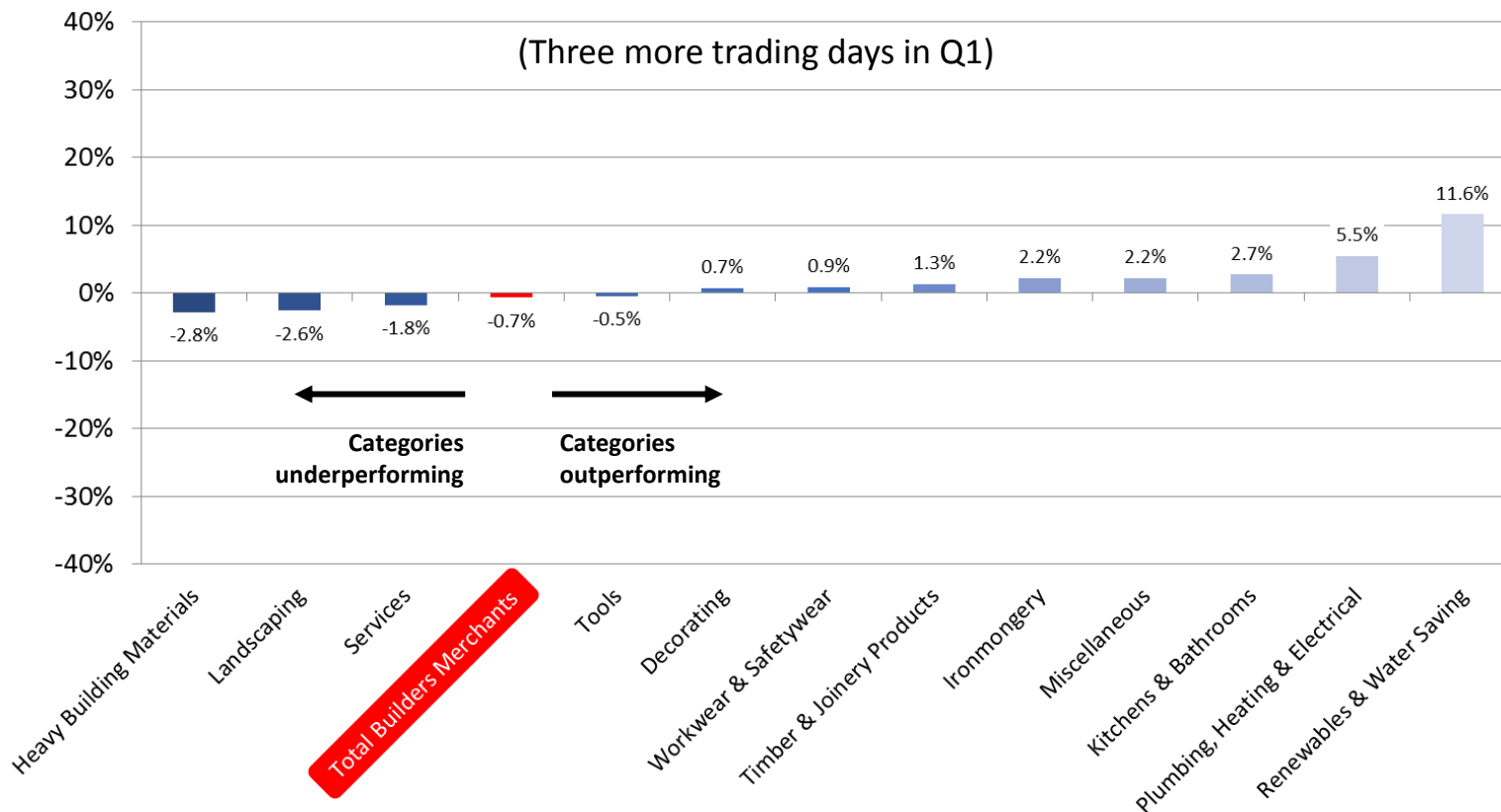
 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018

# Quarterly: Quarter on Quarter

## Q1 2018 sales indices

### Quarter 1 2018 index v Quarter 4 2017 index

(Three more trading days in Q1)

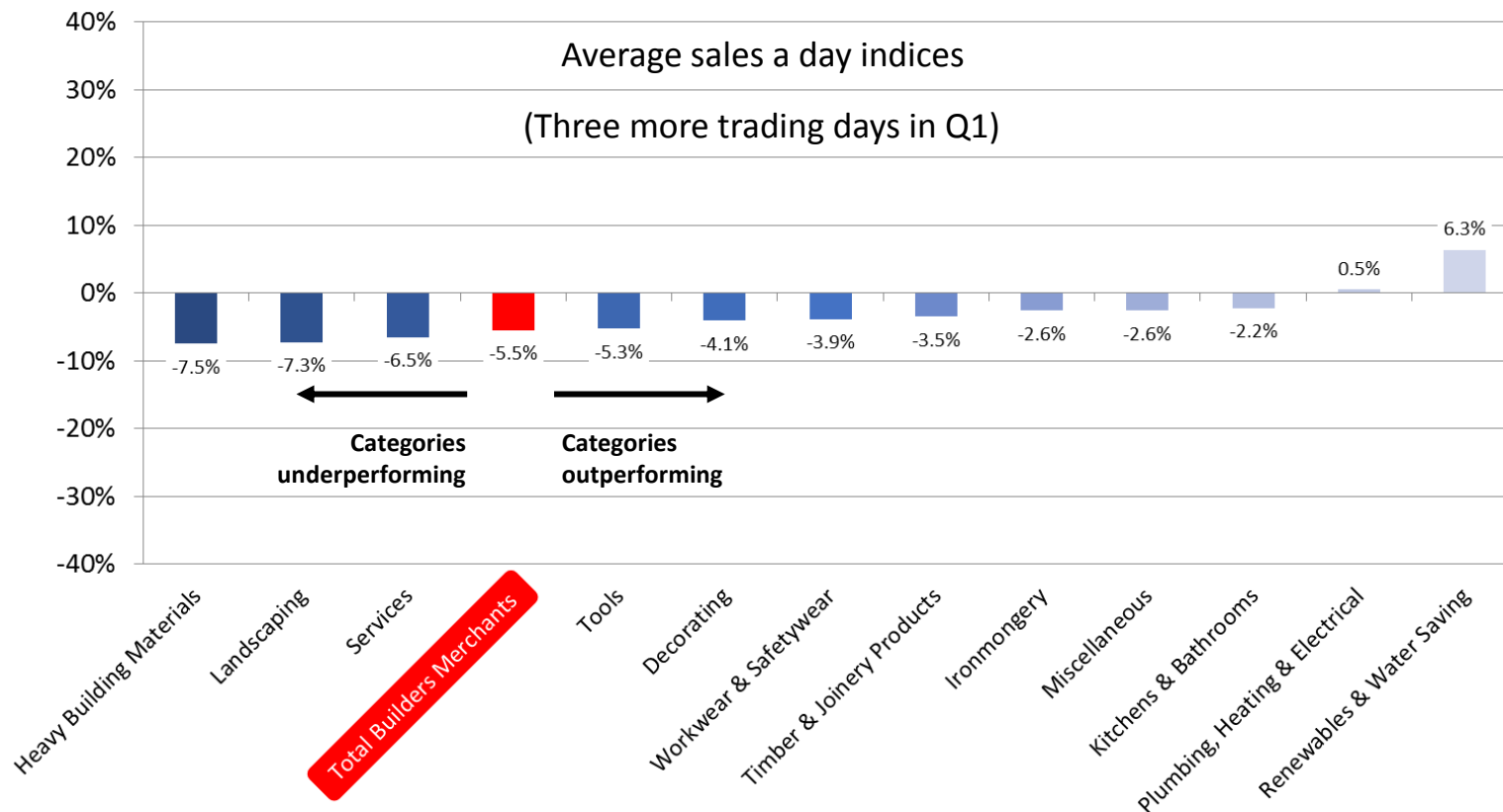


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to March 2018

# Quarterly: Quarter on Quarter

## Q1 2018 average sales a day indices

### Quarter 1 2018 index v Quarter 4 2017 index

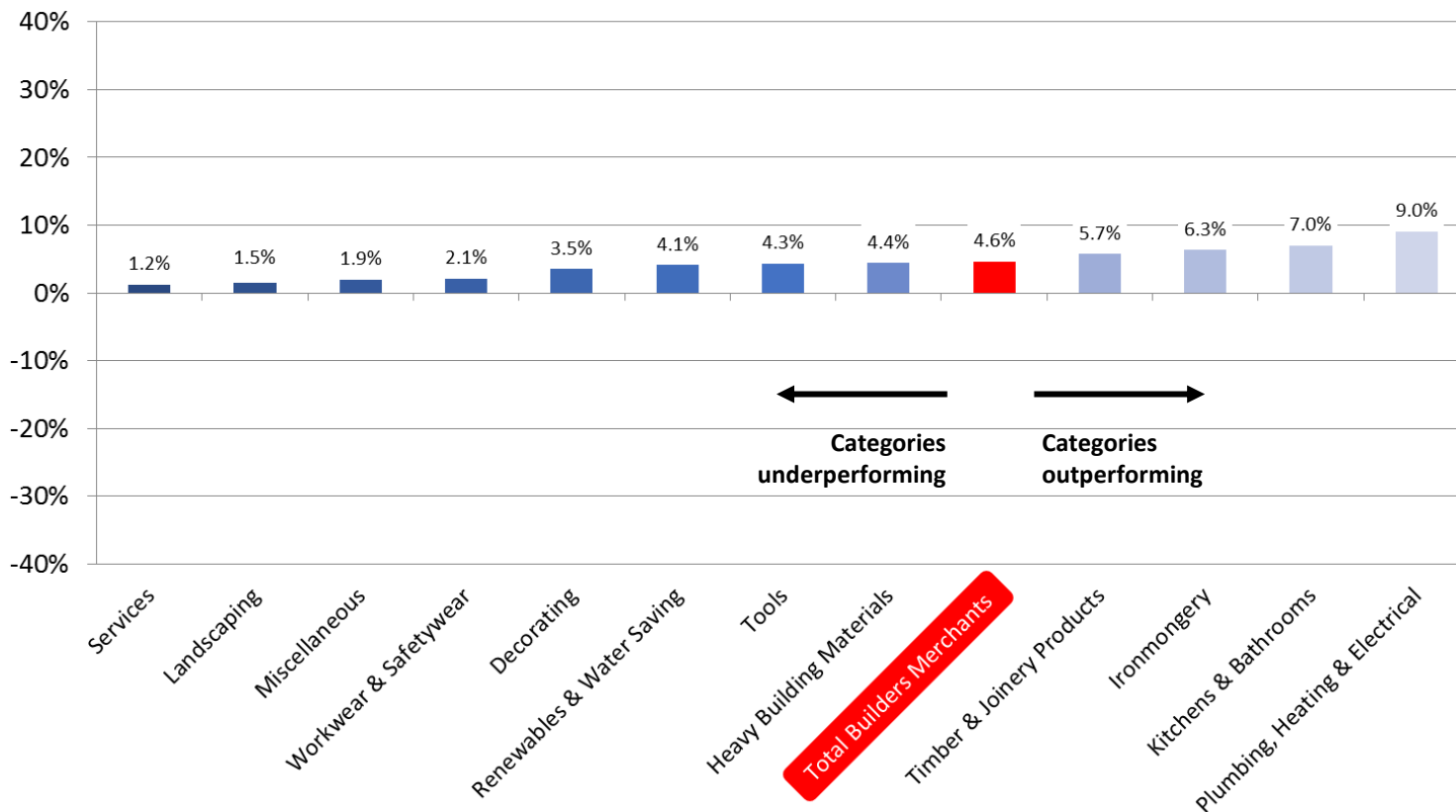


 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018



# Last 12 Months: Year on Year

## 12 months Jun 17 to May 18 v 12 months Jun 16 to May 17

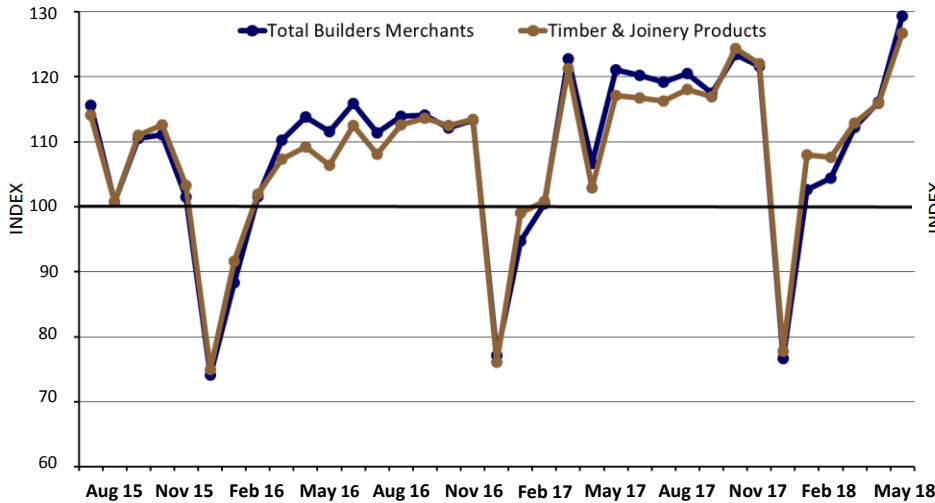


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to May 2018

# Monthly: Indices

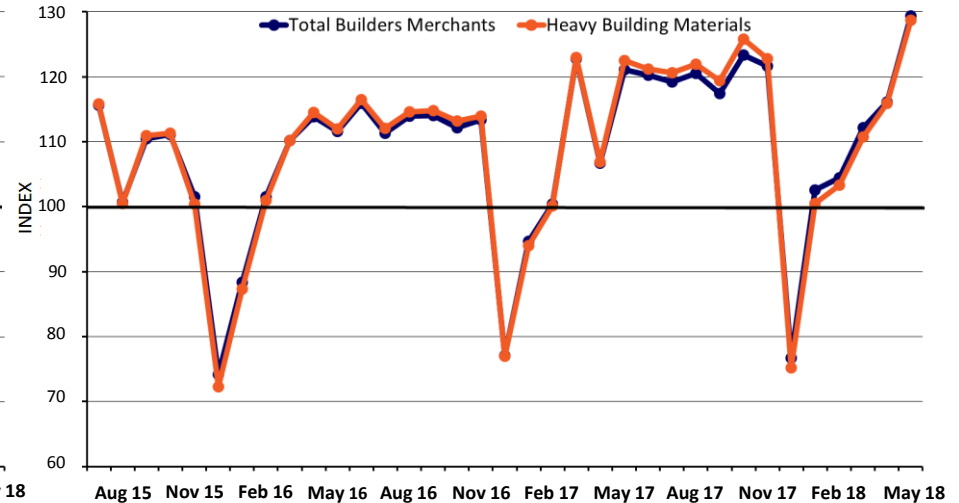
## May 2018

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



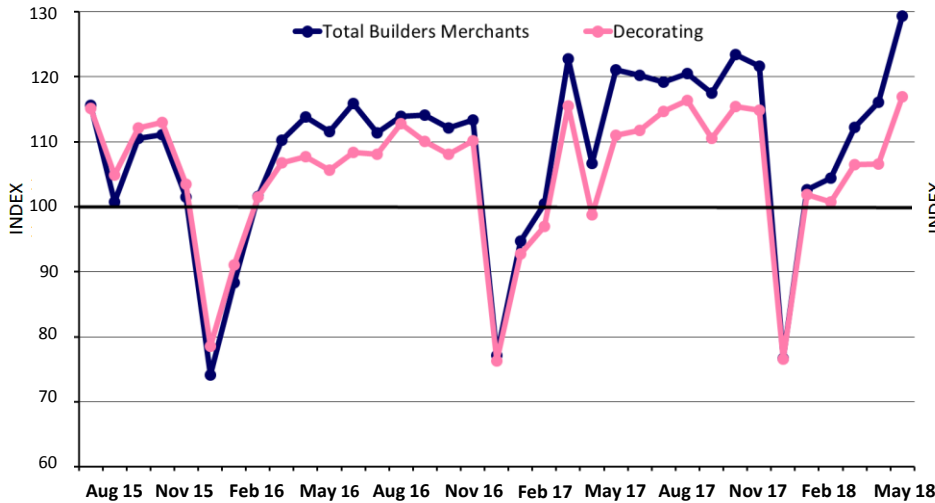
Indexed on July 2014 – June 2015

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

# Monthly: Indices

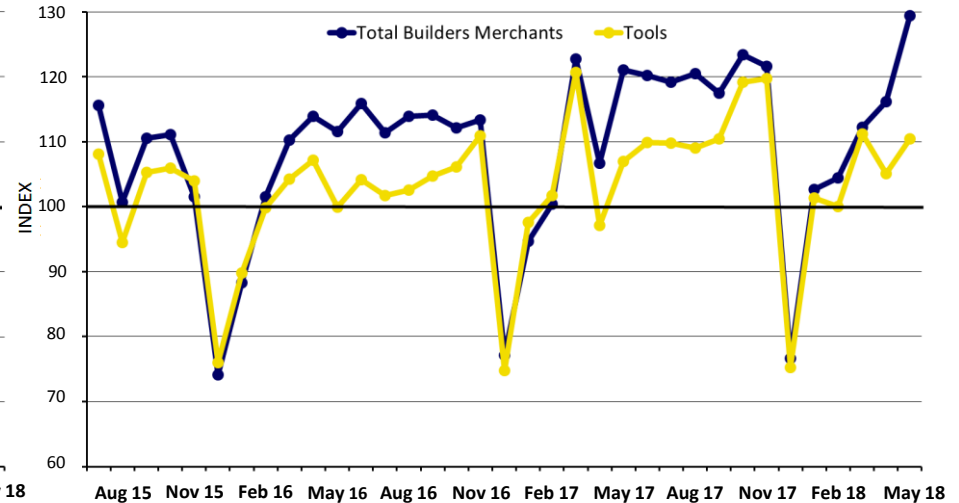
## May 2018

### Decorating



Indexed on July 2014 – June 2015

### Tools



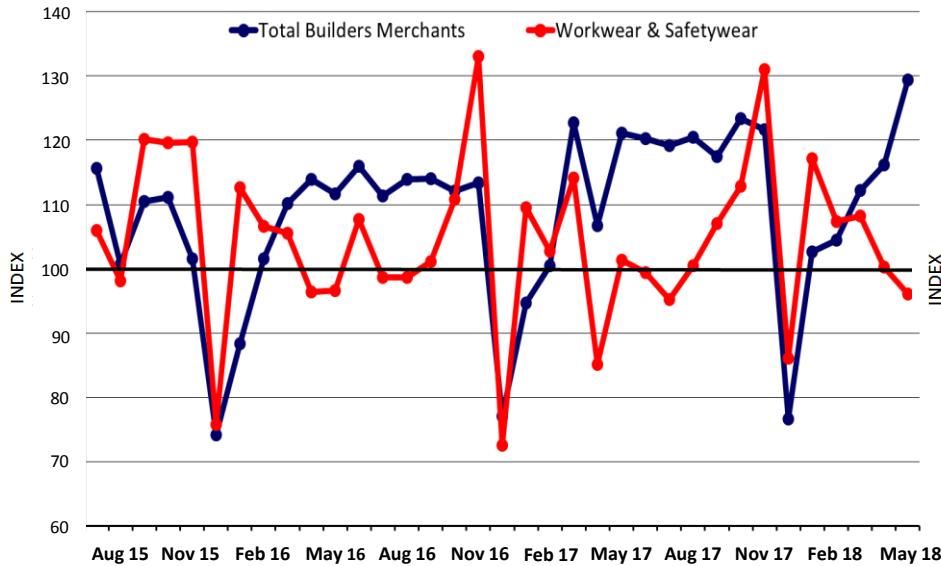
Indexed on July 2014 – June 2015

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

# Monthly: Indices

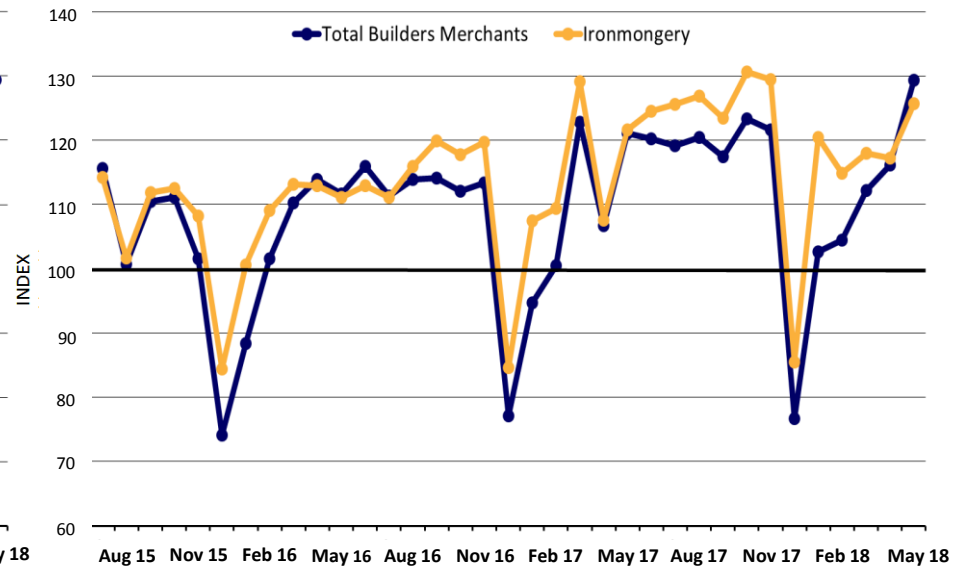
## May 2018

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



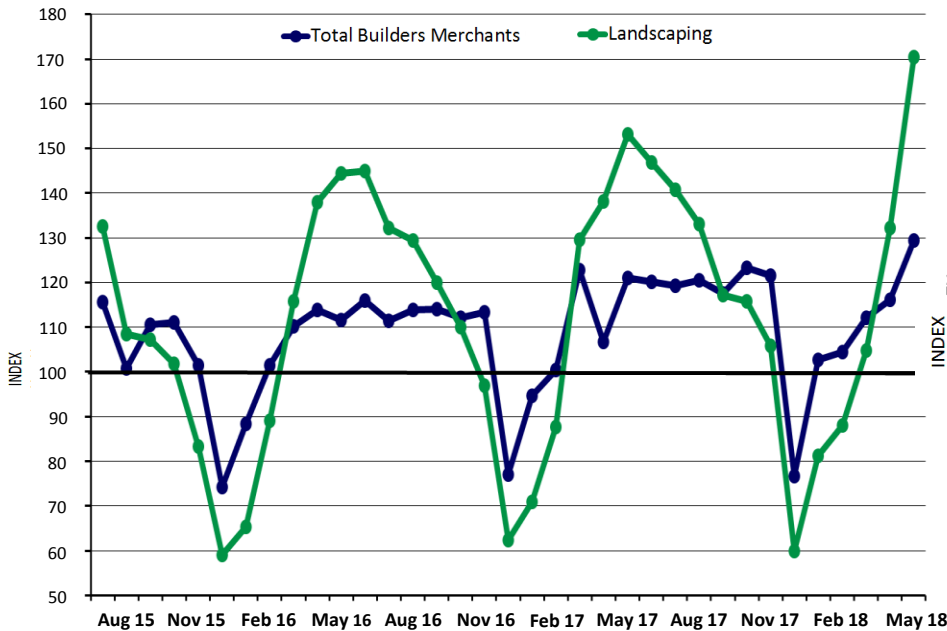
Indexed on July 2014 – June 2015

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

# Monthly: Indices

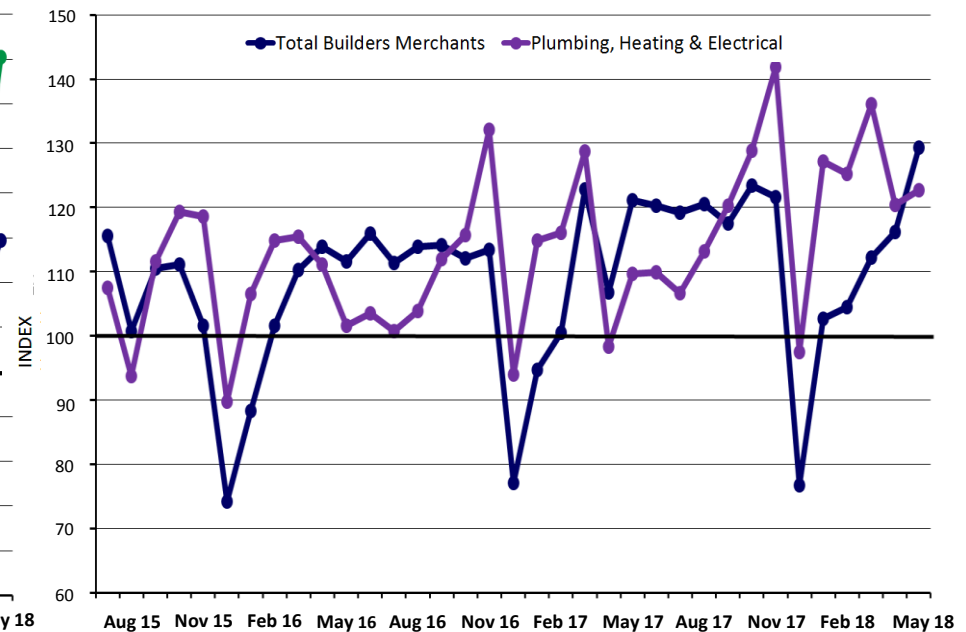
## May 2018

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical



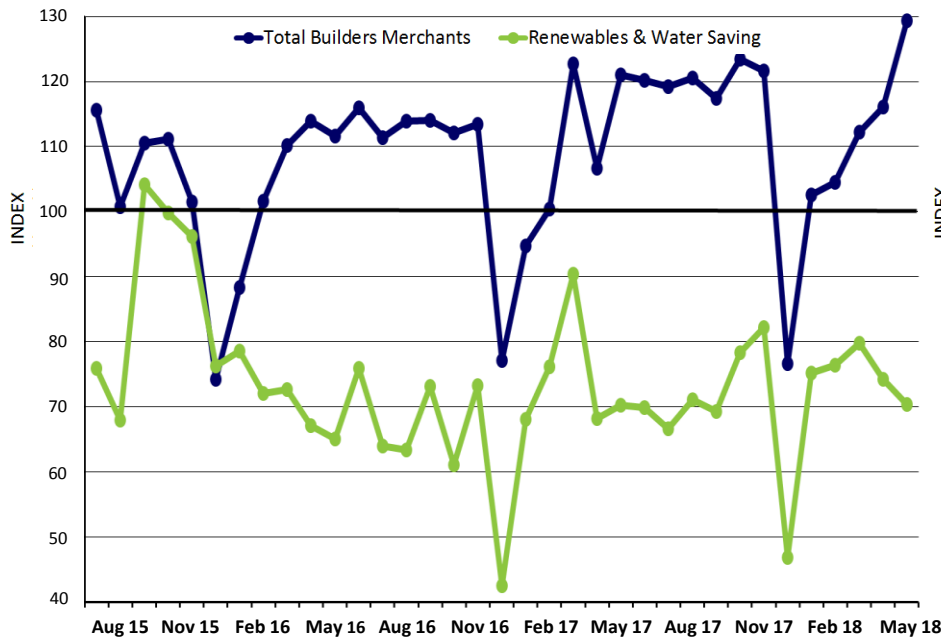
Indexed on July 2014 – June 2015

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

# Monthly: Indices

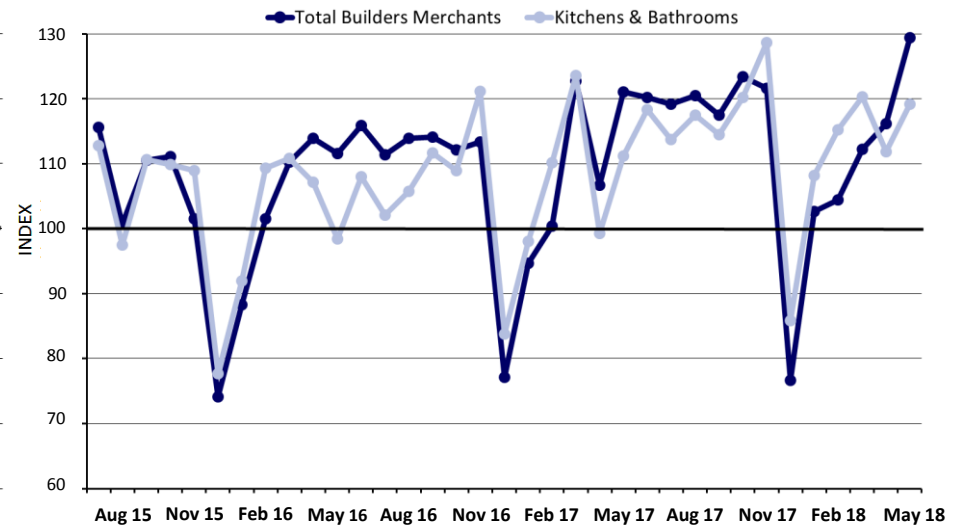
## May 2018

### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms



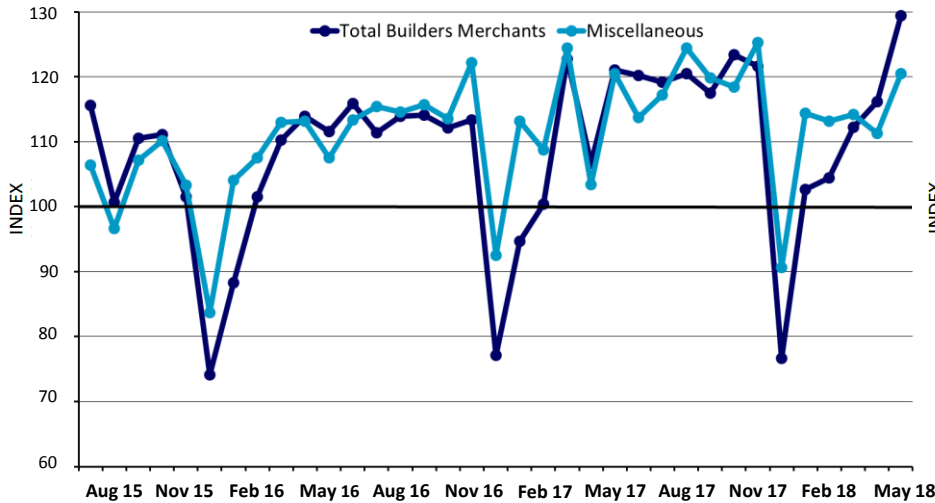
Indexed on July 2014 – June 2015

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

# Monthly: Indices

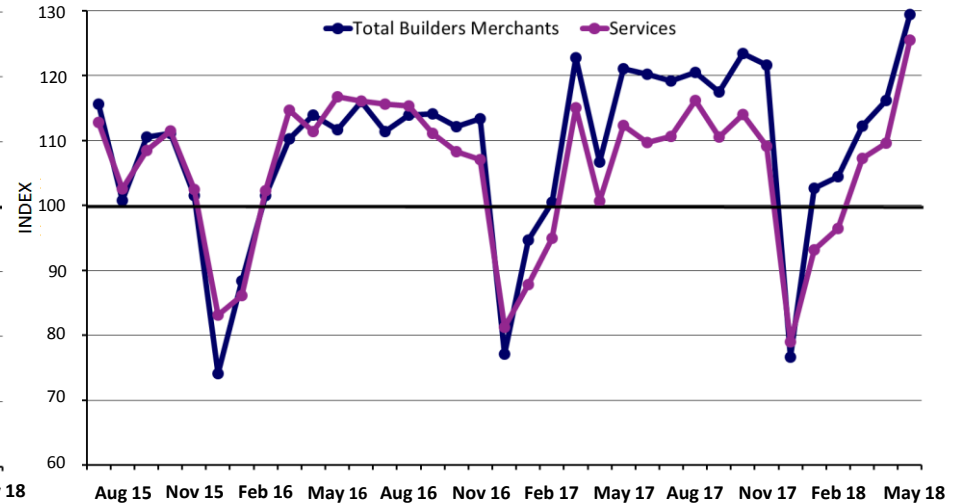
## May 2018

### Miscellaneous



Indexed on July 2014 – June 2015

### Services



Indexed on July 2014 – June 2015

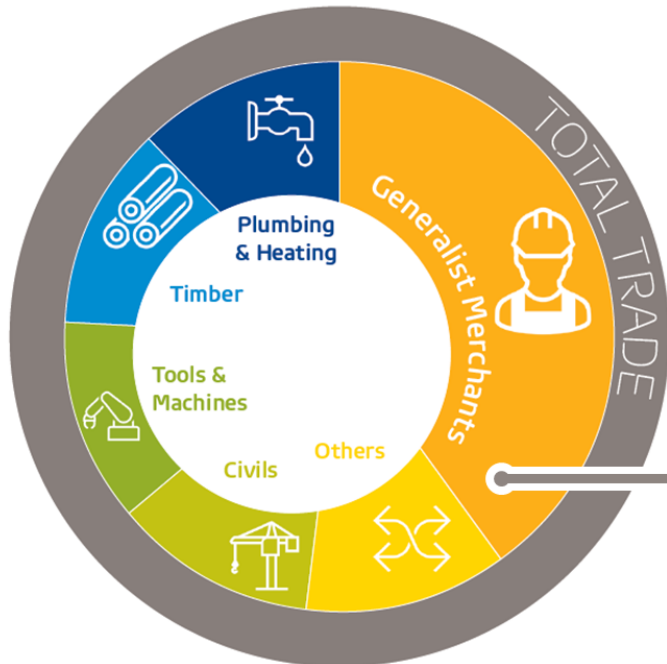
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to May 2018

# 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.

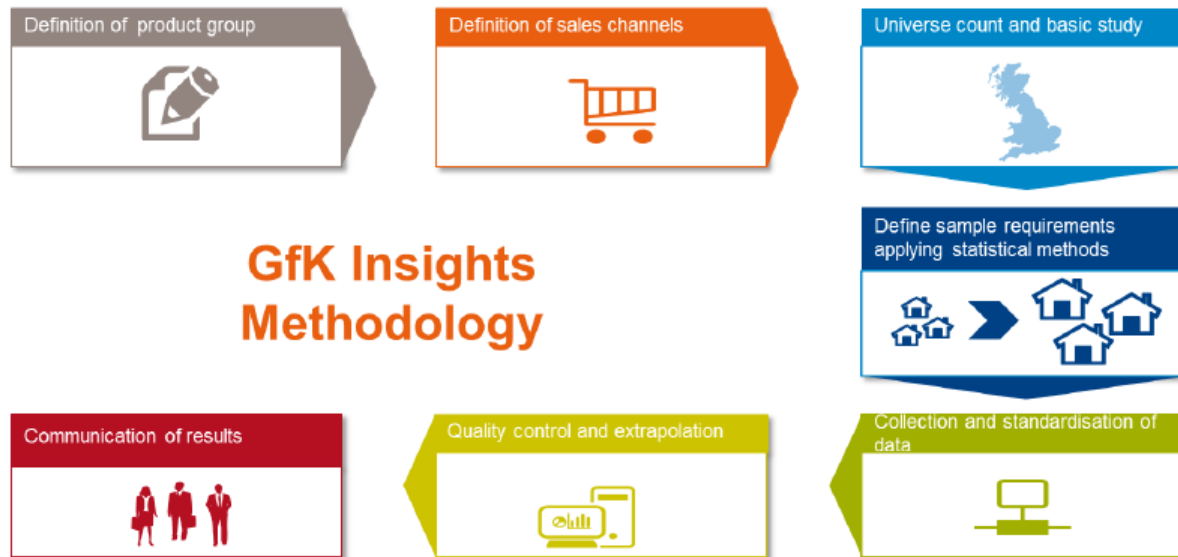
Multiple merchants are those defined as having more than 3 outlets or a turnover of greater than £3m p.a.

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

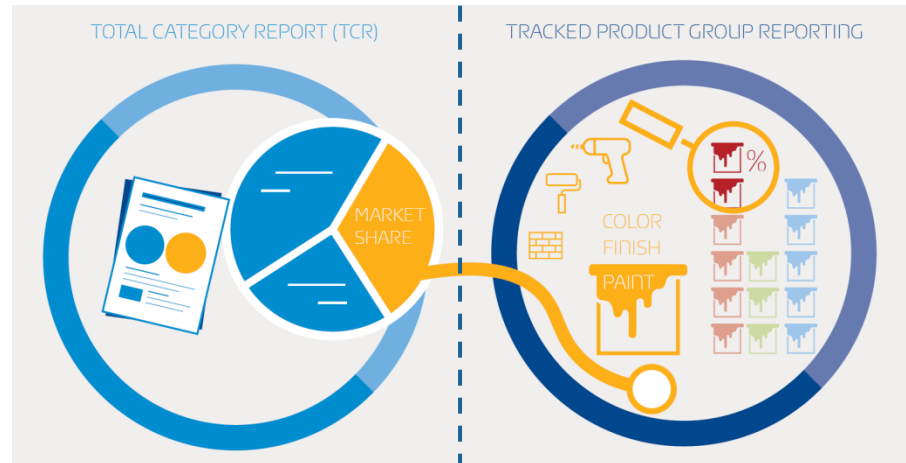
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

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