“one industry
one voice”

# Builders Merchant Building Index

## Monthly report for July 2018

# Building the Industry & Building Brands from Knowledge

Builders Merchant Building Index

**GfK** — Powerful, accurate, continuous insights

**MRA** — Experienced industry experts

**BMF** — The voice of the industry

CIM | MARKETING EXCELLENCE AWARDS 2018 | FINALIST

BEST PRACTICE AWARDS 2018 FINALIST
Commercial Initiative of the Year

cma construction marketing AWARDS 2017 WINNER — Best Product Launch

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Quarterly reports contain additional analysis, macro-economic factors and expert comments. Click the images below to read or download the Q2 report.

# Introduction

Builders Merchant Building Index

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: The Crystal Group, Keylite Roof Windows, Timbmet, Alumasc Water Management Solutions, Hanson Cement, IKO PLC, Keystone Lintels, Knauf Insulation, Encon Insulation, Ibstock, Talasey Group, Heatrae Sadia, Dulux Trade and Lakes, 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.

# Overview

## Merchants' sales break records in July

**Year on year**
Total Builders Merchant value sales were up 8.3% in July compared with July 2017, helped by one more trading day this year. Five categories did better, with Timber & Joinery Products (+12.7%) the top performer and Landscaping (+11.2%) close behind. Three categories achieved their highest monthly sales in the four years BMBI data has been compiled: Heavy Building Materials, Timber & Joinery Products and Decorating.

Average sales a day, which take trading day differences into account were up 3.3% on July last year.

**Month on month**
Overall sales in July were 1.1% higher than in June, helped by one extra trading day this month. Six categories did better, with Timber & Joinery Products, Ironmongery and Decorating all 3.9% higher. Seasonal category, Landscaping was weakest (-4.6%).

Average sales a day in July were 3.5% lower than in June.

**Other periods**
The first seven months of 2018 were 4.6% ahead of the same period in 2017, with one additional trading day this year. Plumbing Heating & Electrical (+10.4%) did best, with Timber & Joinery Products (+7.0%) and Kitchens & Bathrooms (+5.1%) also performing well. Average sales a day for January to July were up 3.9% on the same months last year.

The rolling 12 months August 2017 to July 2018 were 5.0% above the same period a year earlier. Plumbing Heating & Electrical (+9.3%) was strongest and all categories sold more.

**Index**
July's BMBI index was 129.1, with one additional trading day. Landscaping was top (156.6) followed by Timber & Joinery Products (131.1) and Heavy Building Materials (128.8). Ten of the 12 categories exceeded 100.

Three categories achieved their highest monthly sales in the four years BMBI data has been compiled: Heavy Building Materials, Timber & Joinery Products and Decorating.

# 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 Q2 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**

Crystal No.1 for choice • No.1 for colour

Read latest Comment: Q2 2018 Report

**Steve Durdant-Hollamby**
Managing Director
Alumasc Water Management Systems

**Expert for Civils, Metal Rainwater & Drainage**

ALUMASC WATER MANAGEMENT SOLUTIONS

Read latest Comment: Q2 2018 Report

**John Duffin**
Managing Director
Keylite Roof Windows

**Expert for Roof Windows**

keylite Roof Windows

Read latest Comment: Q2 2018 Report

**Andrew Simpson**
National Commercial Director
Hanson Cement

**Expert for Cement & Aggregates**

Hanson HEIDELBERGCEMENT Group

Read latest Comment: Q2 2018 Report

**Nigel Cox**
Managing Director
Timbmet

**Expert for Timber & Panel Products**

TIMBMET Everything wood should be

Read latest Comment: Q2 2018 Report

**Paul Owen**
Commercial Director Distribution
IKO PLC

**Expert for Roofing Products**

IKO Setting the Standard

Read latest Comment: Q2 2018 Report

# The Expert Panel
## Speaking for their markets - 2

Builders Merchant Building Index

**Derrick McFarland**
Managing Director
Keystone Lintels

**Expert for Steel Lintels**

Keystone LINTELS

Read latest Comment: Q2 2018 Report

**Tony France**
Sales Director
Ibstock

**Expert for Bricks**

IBSTOCK

Read latest Comment: Q2 2018 Report

**John Sinfield**
Managing Director
Knauf Insulation

**Expert for Mineral Wool Insulation**

KNAUF INSULATION

Read latest Comment: Q2 2018 Report

**Paul Rivett**
Managing Director
Heatrae Sadia

**Expert for Water Heating**

HEATRAE SADIA
SMARTER | CLEANER | WARMER

Read latest Comment: Q2 2018 Report

**Mike Beard**
Merchant Development Director
Encon Insulation

**Expert for Insulation Products - Distribution**

encon INSULATION

Read latest Comment: Q2 2018 Report

**Malcolm Gough**
Group Sales & Marketing Director
Talasey Group

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

TALASEY GROUP | NATURAL PAVING

Read latest Comment: Q2 2018 Report

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

**Expert for Paint**

Dulux TRADE

Read latest Comment: Q2 2018 Report

**Mike Tattam**
Sales & Marketing Director
Lakes

**Expert for Shower Enclosures and Showering**

LAKES SHOWERING SPACES

Read latest Comment: Q2 2018 Report

# Monthly: Index and Categories
## July 2017* – July 2018
(Indexed on monthly average, July 2014 – June 2015)

Builders Merchant Building Index

| | | 2017 | | | | | | 2018 | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| MONTHLY SALES VALUE INDEX | Index | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June | July |
| Total Builders Merchants | 100 | 119.2 | 120.2 | 117.5 | 123.4 | 121.6 | 76.7 | 102.6 | 104.5 | 112.2 | 116.1 | 129.4 | 127.6 | 129.1 |
| Timber & Joinery Products | 100 | 116.3 | 117.3 | 116.9 | 124.4 | 122.1 | 77.8 | 108.0 | 107.6 | 112.9 | 115.9 | 126.7 | 126.2 | 131.1 |
| Heavy Building Materials | 100 | 120.6 | 121.6 | 119.4 | 125.8 | 122.8 | 75.2 | 100.5 | 103.3 | 110.8 | 115.9 | 128.7 | 128.0 | 128.8 |
| Decorating | 100 | 114.6 | 115.6 | 110.5 | 115.4 | 114.9 | 76.6 | 101.9 | 100.8 | 106.5 | 106.6 | 117.0 | 114.9 | 119.4 |
| Tools | 100 | 109.8 | 110.8 | 110.4 | 119.2 | 119.8 | 75.3 | 101.3 | 100.0 | 111.2 | 105.1 | 110.5 | 113.3 | 112.5 |
| Workwear & Safetywear | 100 | 95.2 | 96.2 | 107.0 | 112.9 | 131.0 | 86.1 | 117.2 | 107.3 | 108.3 | 100.2 | 96.0 | 95.7 | 95.9 |
| Ironmongery | 100 | 125.6 | 126.6 | 123.4 | 130.6 | 129.5 | 85.5 | 120.4 | 114.8 | 118.0 | 117.3 | 125.7 | 123.9 | 128.8 |
| Landscaping | 100 | 140.8 | 141.8 | 117.1 | 115.8 | 105.8 | 60.0 | 81.3 | 88.0 | 104.8 | 132.1 | 170.4 | 164.1 | 156.6 |
| Plumbing, Heating & Electrical | 100 | 106.6 | 107.6 | 120.3 | 128.9 | 141.9 | 97.4 | 127.2 | 125.2 | 136.1 | 120.4 | 122.7 | 117.1 | 116.8 |
| Renewables & Water Saving | 100 | 66.6 | 67.6 | 69.2 | 78.3 | 82.2 | 46.8 | 75.2 | 76.3 | 79.8 | 74.2 | 70.4 | 75.0 | 73.5 |
| Kitchens & Bathrooms | 100 | 113.7 | 114.7 | 114.5 | 120.2 | 128.6 | 85.9 | 108.2 | 115.2 | 120.3 | 111.9 | 119.2 | 117.8 | 121.4 |
| Miscellaneous | 100 | 117.2 | 118.2 | 119.8 | 118.4 | 125.3 | 90.7 | 114.4 | 113.2 | 114.2 | 111.3 | 120.5 | 115.3 | 116.8 |
| Services | 100 | 110.6 | 111.6 | 110.6 | 114.0 | 109.2 | 79.0 | 93.1 | 96.4 | 107.3 | 109.6 | 125.4 | 116.9 | 121.1 |

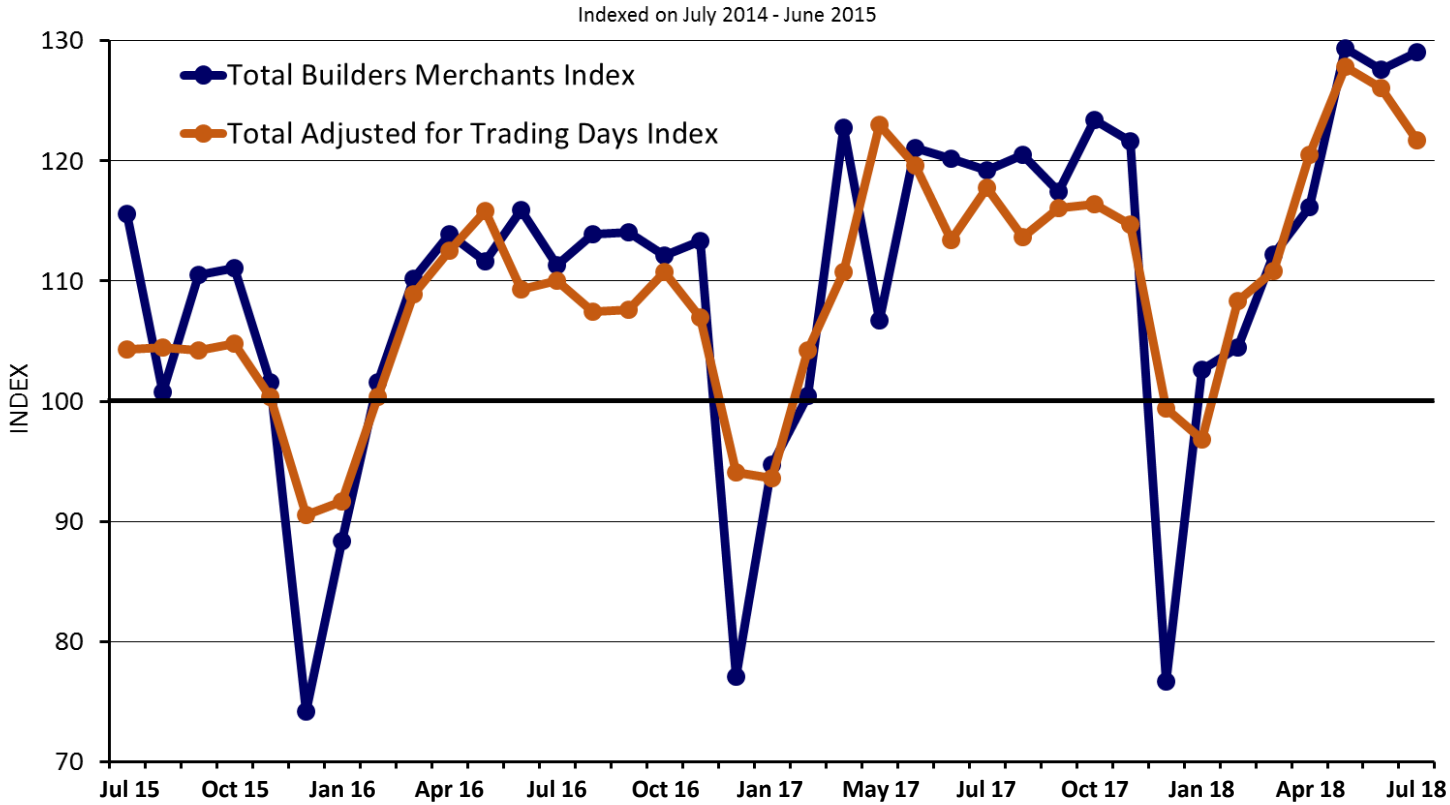
*Click the web link below to see the complete series of indices from July 2015.

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

# Monthly: Index
## Adjusted and unadjusted for trading days

Builders Merchant Building Index

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

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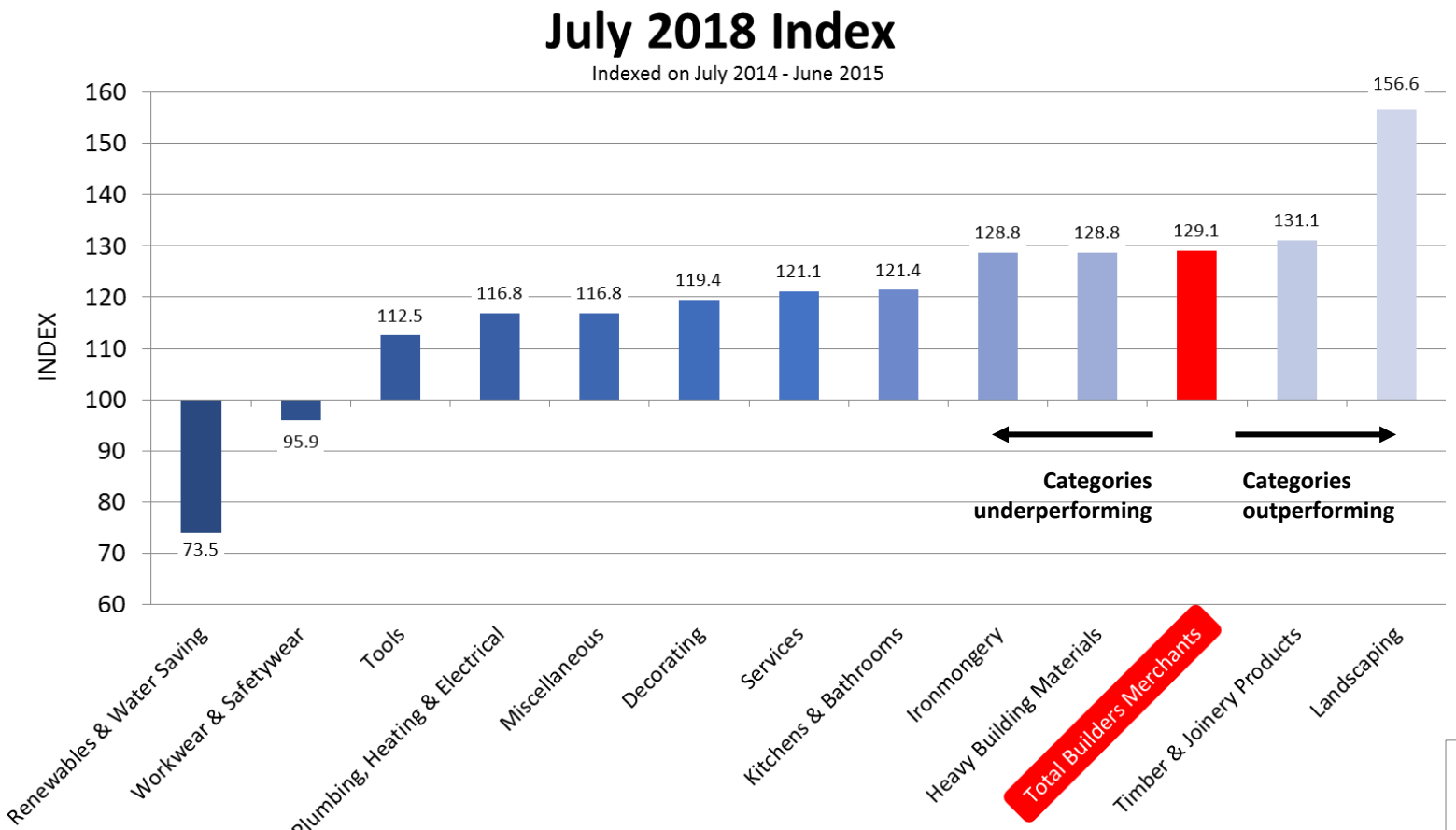
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Trading days: | Index 20.8 | Months: | 23 | 20 | 22 | 22 | 21 | 17 | 20 | 21 | 21 | 21 | 20 | 22 | 21 | 22 | 22 | 21 | 22 | 17 | 21 | 20 | 23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

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

# **Monthly:** Index and Categories
## July 2018 index

Builders Merchant Building Index



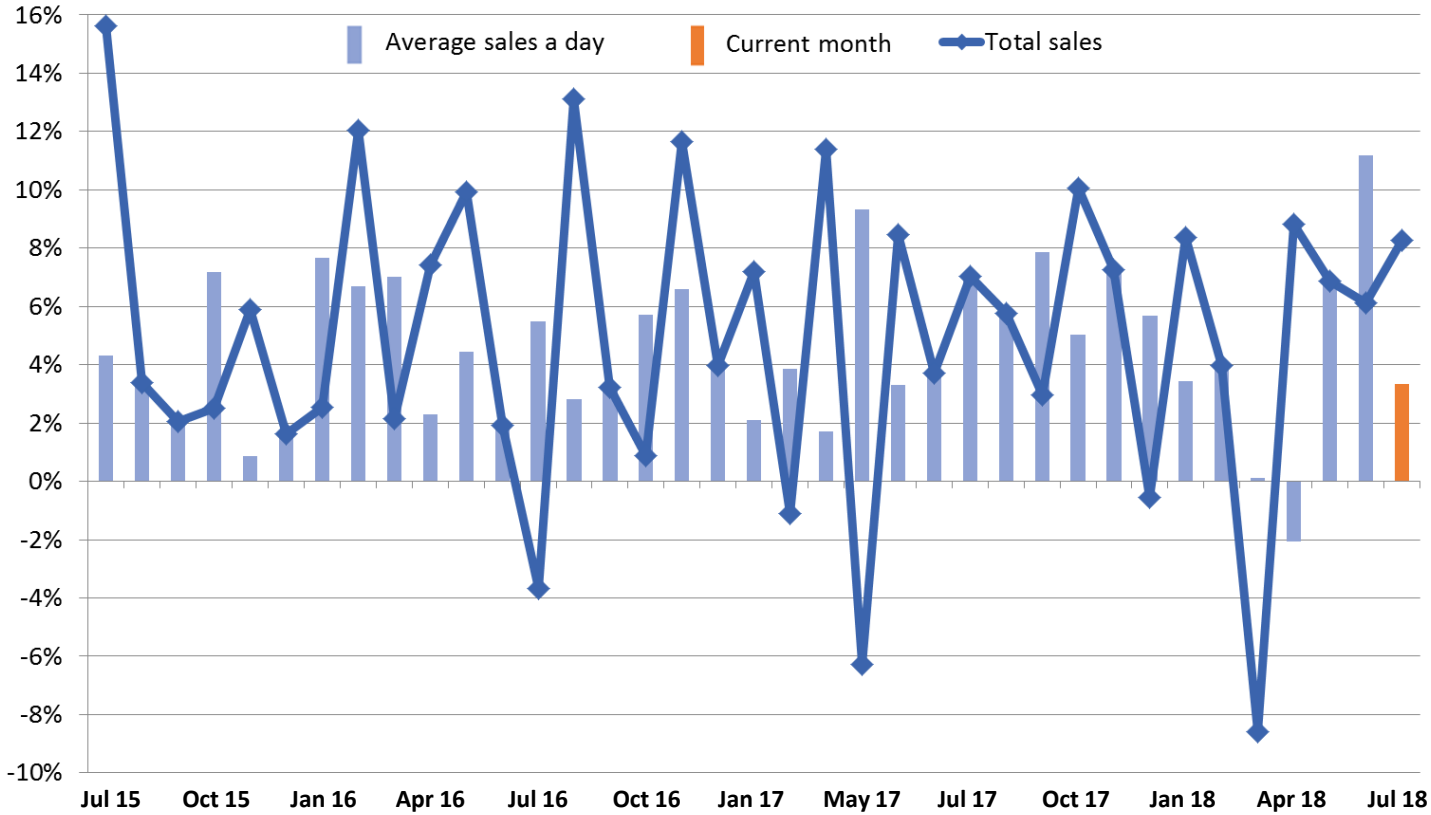

Source: GfK's Builders Merchants Total Category Report July 2015 to July 2018

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

Builders Merchant Building Index

### Monthly: Year on Year

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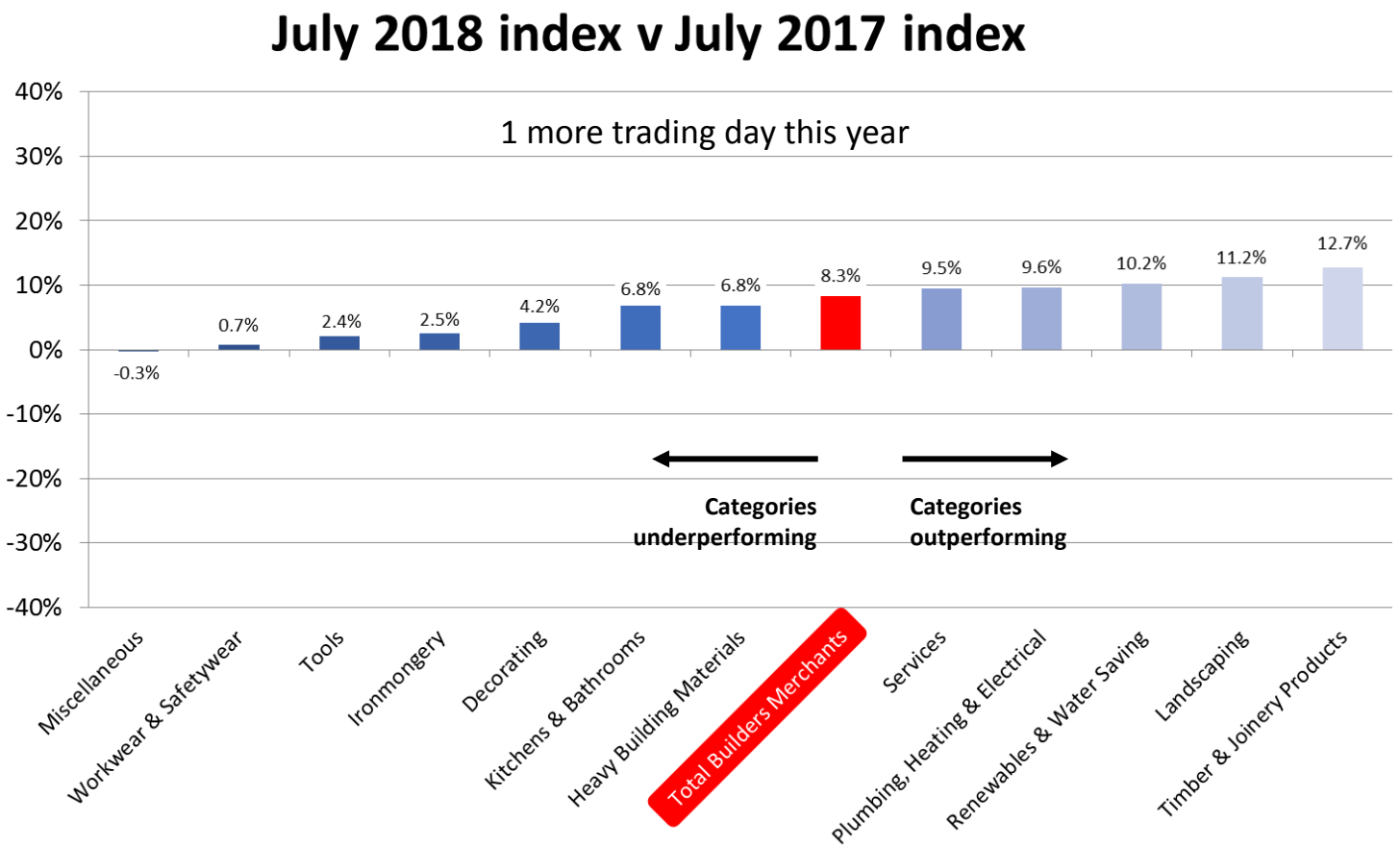
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Trading days: | Index 20.8 | Months: | 23 | 20 | 22 | 22 | 21 | 17 | 20 | 21 | 21 | 21 | 20 | 22 | 21 | 22 | 22 | 21 | 22 | 17 | 21 | 20 | 23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

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

# **Monthly:** This Year v Last Year
## July 2018 sales indices

Builders Merchant Building Index



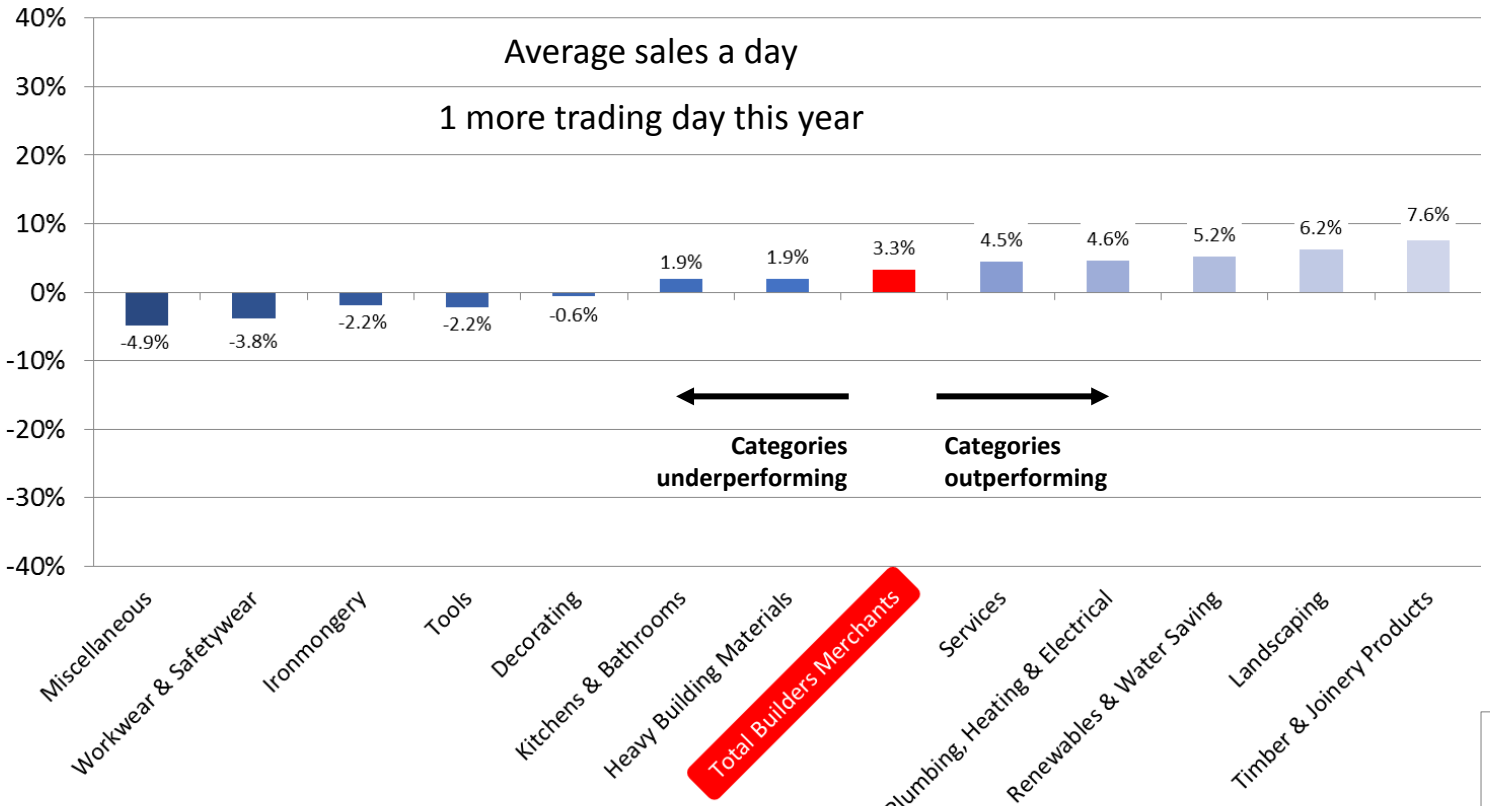

Source: GfK's Builders Merchants Total Category Report July 2015 to July 2018

# **Monthly:** This Year v Last Year

## July 2018 average
## Sales a day indices

Builders Merchant Building Index

### July 2018 index v July 2017 index

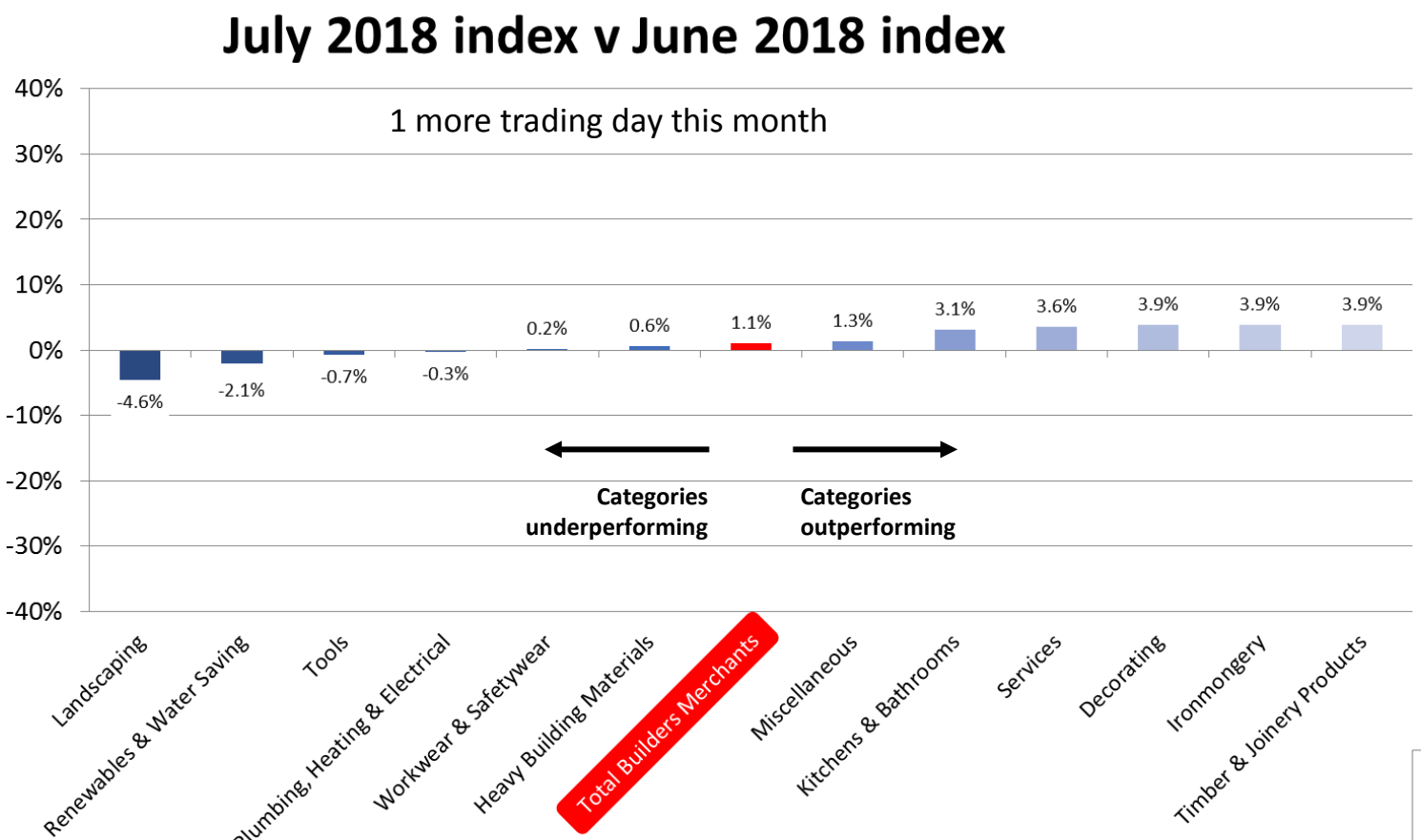



Source: GfK's Builders Merchants Total Category Report July 2015 to July 2018

# **Monthly:** This Month v Last Month

## July 2018 sales indices

Builders Merchant Building Index

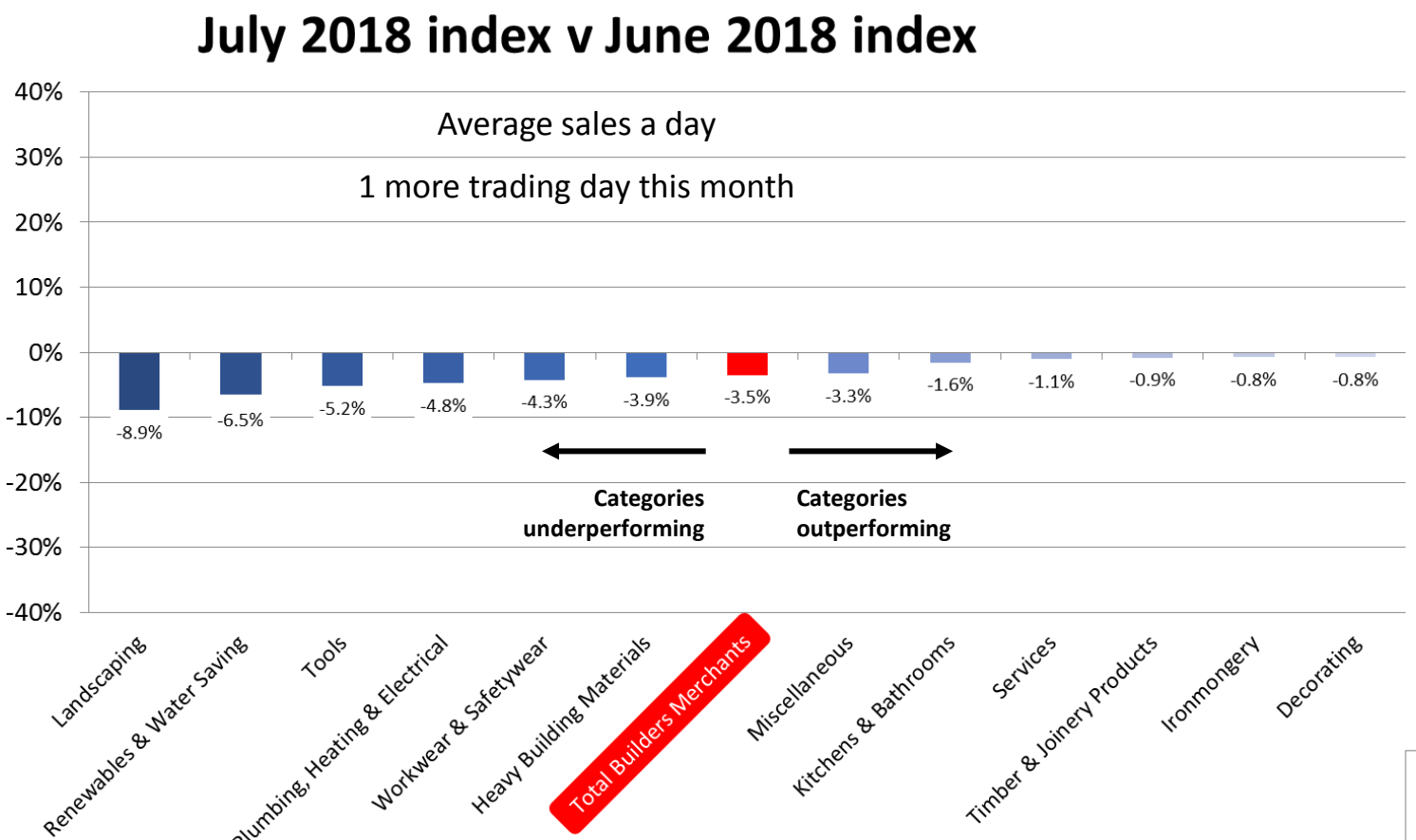



Source: GfK's Builders Merchants Total Category Report July 2015 to July 2018

# **Monthly:** This Month v Last Month

## July 2018 average sales a day indices

Builders Merchant Building Index




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

# Quarterly: Index and Categories

## Quarter 2 2017* to Quarter 2 2018

(Indexed on July 2014 to June 2015)

Builders Merchant Building Index

| QUARTERLY SALES VALUE INDEX | Index | Q2 2017 | Q3 2017 | Q4 2017 | Q1 2018 | Q2 2018 |
|---|---|---|---|---|---|---|
| Total Builders Merchants | 100 | 116.0 | 119.1 | 107.2 | 106.4 | 124.4 |
| Timber & Joinery Products | 100 | 112.3 | 117.1 | 108.1 | 109.5 | 122.9 |
| Heavy Building Materials | 100 | 116.9 | 120.7 | 107.9 | 104.9 | 124.2 |
| Decorating | 100 | 107.2 | 113.9 | 102.3 | 103.0 | 112.8 |
| Tools | 100 | 104.7 | 109.8 | 104.7 | 104.2 | 109.6 |
| Workwear & Safetywear | 100 | 95.3 | 100.9 | 110.0 | 110.9 | 97.3 |
| Ironmongery | 100 | 117.9 | 125.3 | 115.2 | 117.8 | 122.3 |
| Landscaping | 100 | 146.0 | 130.4 | 93.8 | 91.4 | 155.5 |
| Plumbing, Heating & Electrical | 100 | 106.0 | 113.4 | 122.7 | 129.5 | 120.1 |
| Renewables & Water Saving | 100 | 69.4 | 69.0 | 69.1 | 77.1 | 73.2 |
| Kitchens & Bathrooms | 100 | 109.6 | 115.2 | 111.6 | 114.6 | 116.3 |
| Miscellaneous | 100 | 112.5 | 120.5 | 111.4 | 113.9 | 115.7 |
| Services | 100 | 107.6 | 112.4 | 100.7 | 98.9 | 117.3 |

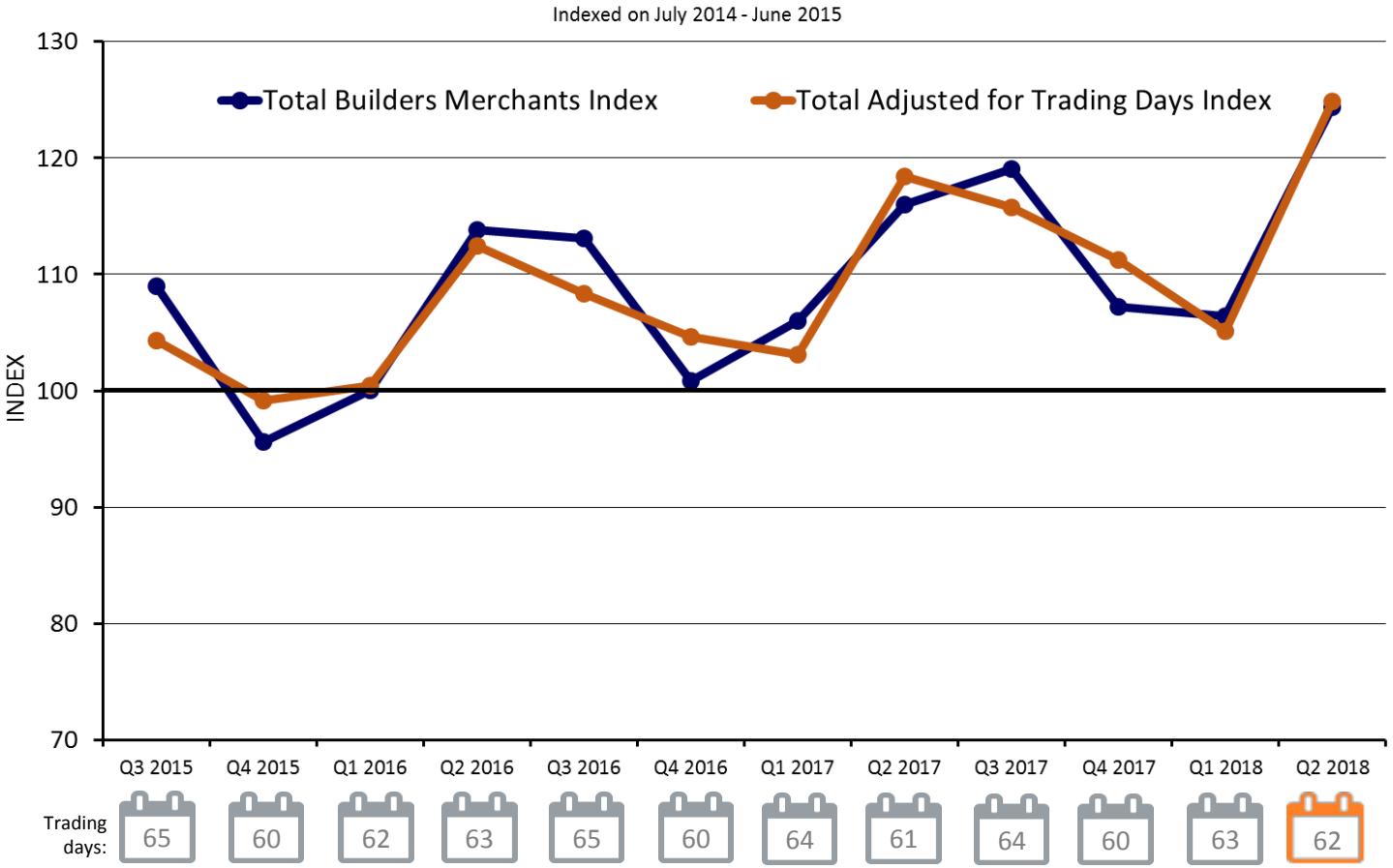
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

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

# Quarterly: Index
## Adjusted and unadjusted for trading days

Builders Merchant Building Index

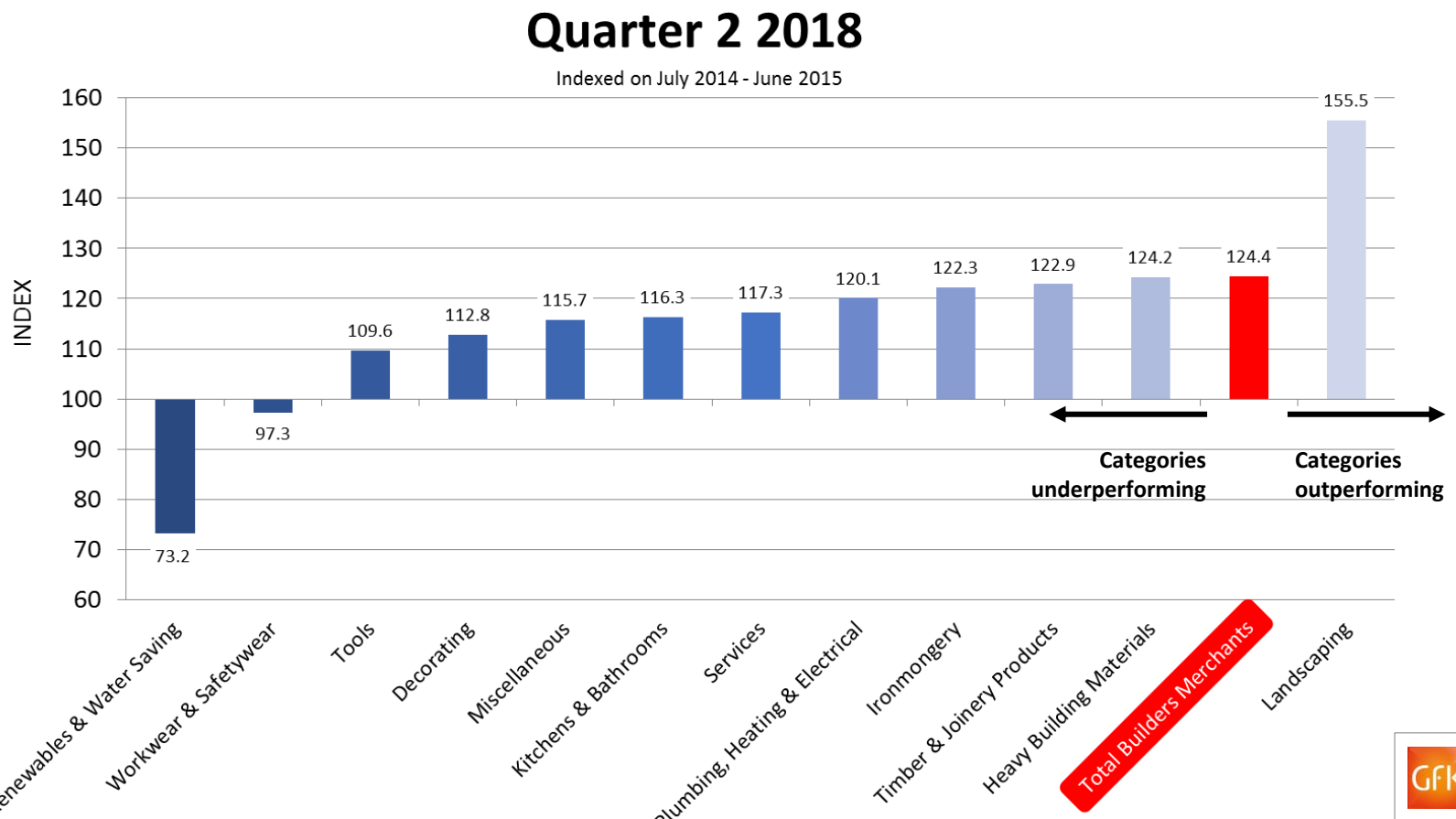
### Total Builders Merchants Index v Total Adjusted for Trading Days Index




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

# **Quarterly**: Index and Categories
## Q2 2018 index

Builders Merchant Building Index

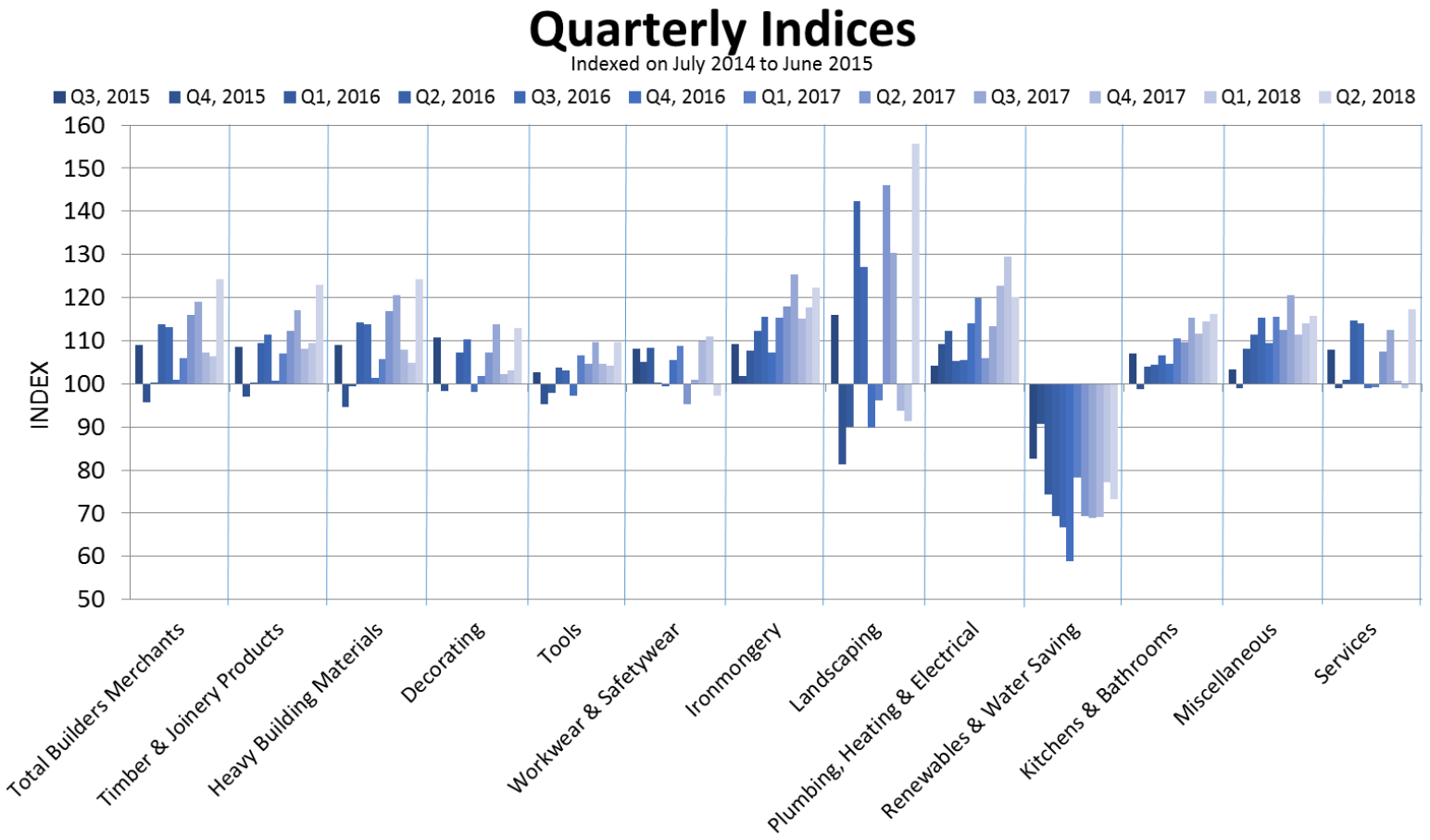



Source: GfK's Builders Merchants Total Category Report July 2015 to June 2018

# **Quarterly**: Index and Categories

## Quarterly indices

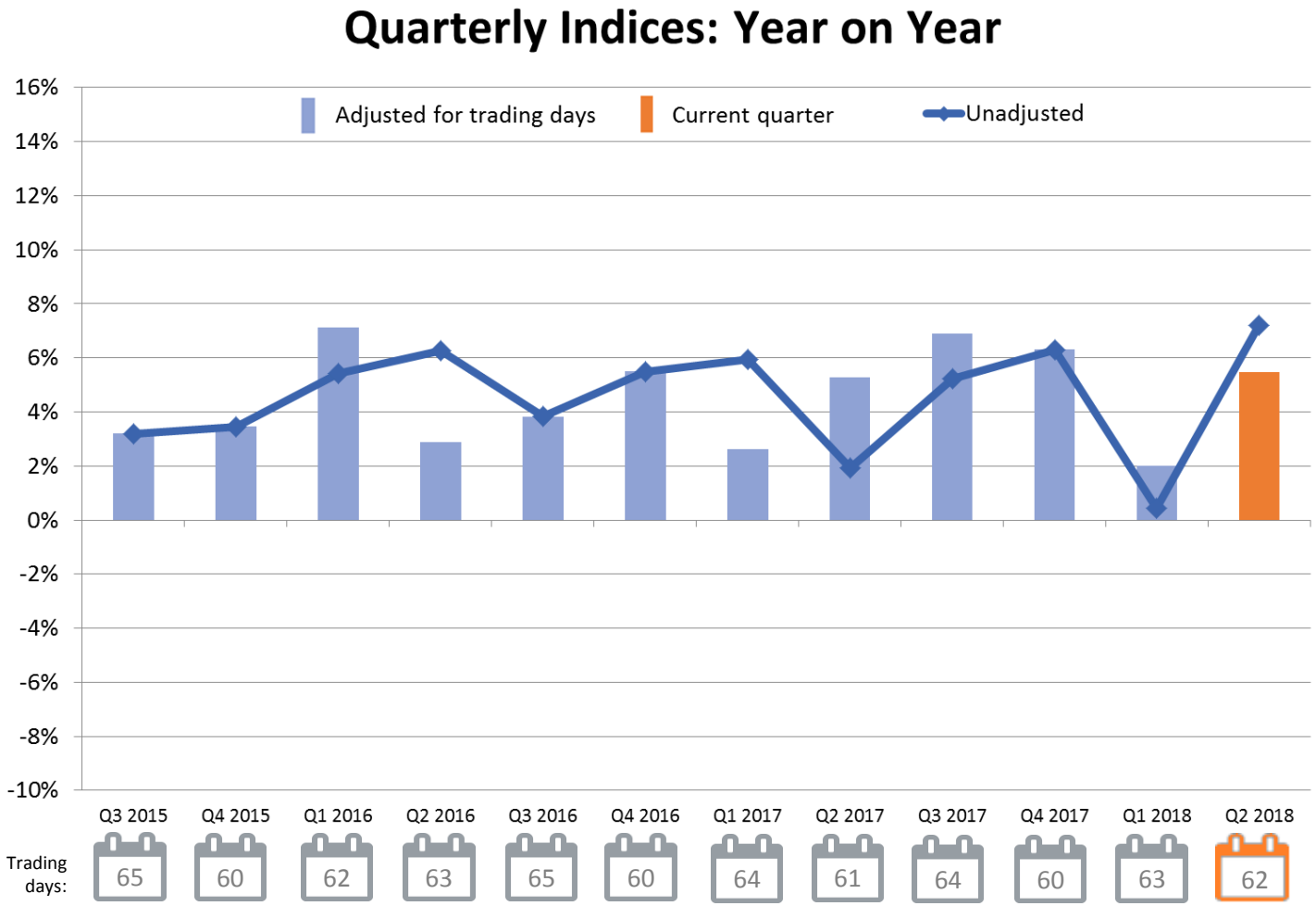
Builders Merchant Building Index




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

# Quarterly: Sales Indices
## Adjusted and unadjusted for trading days

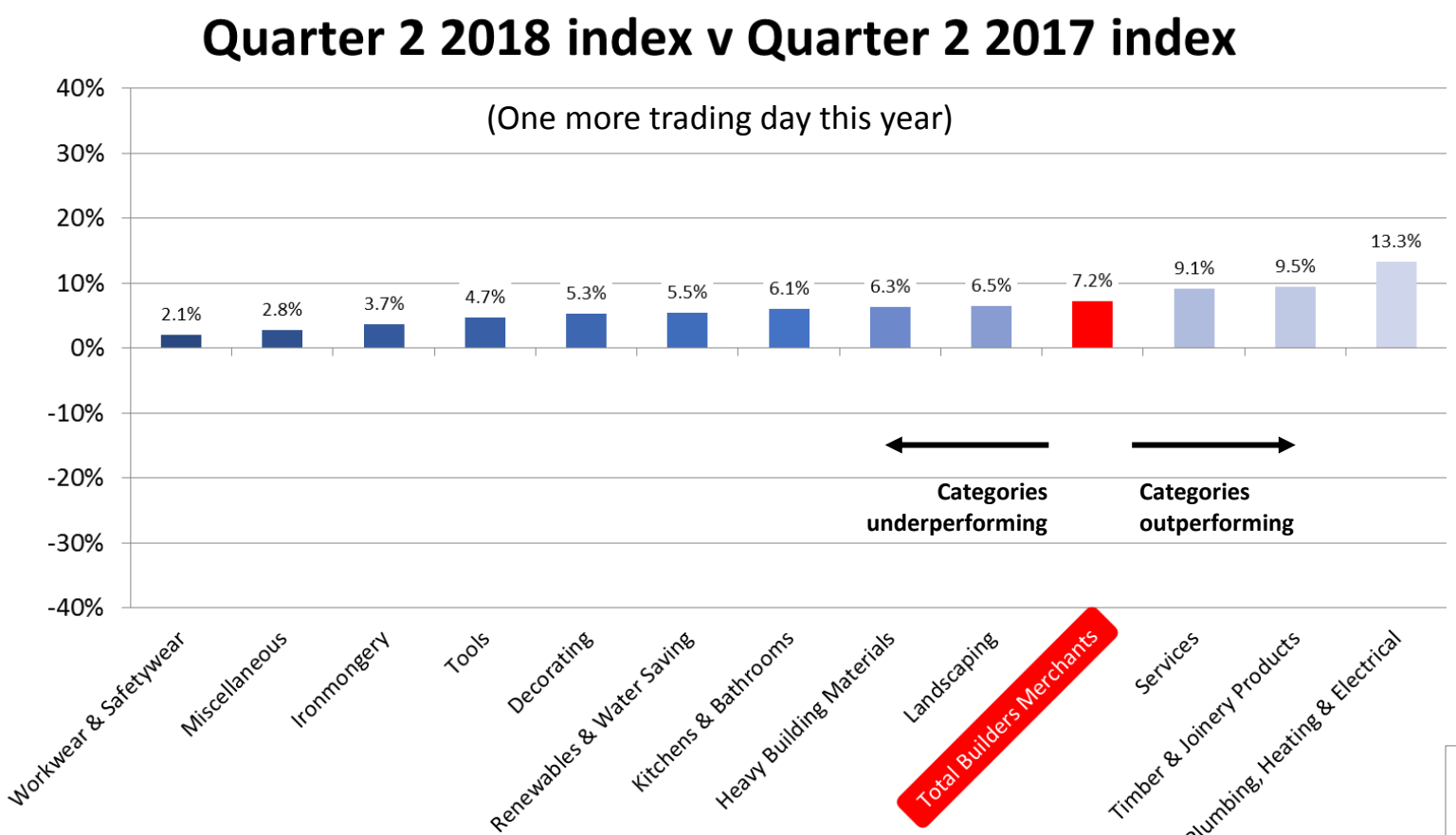
Builders Merchant Building Index




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

# **Quarterly**: This Year v Last Year
## Q2 2018 sales indices

Builders Merchant Building Index

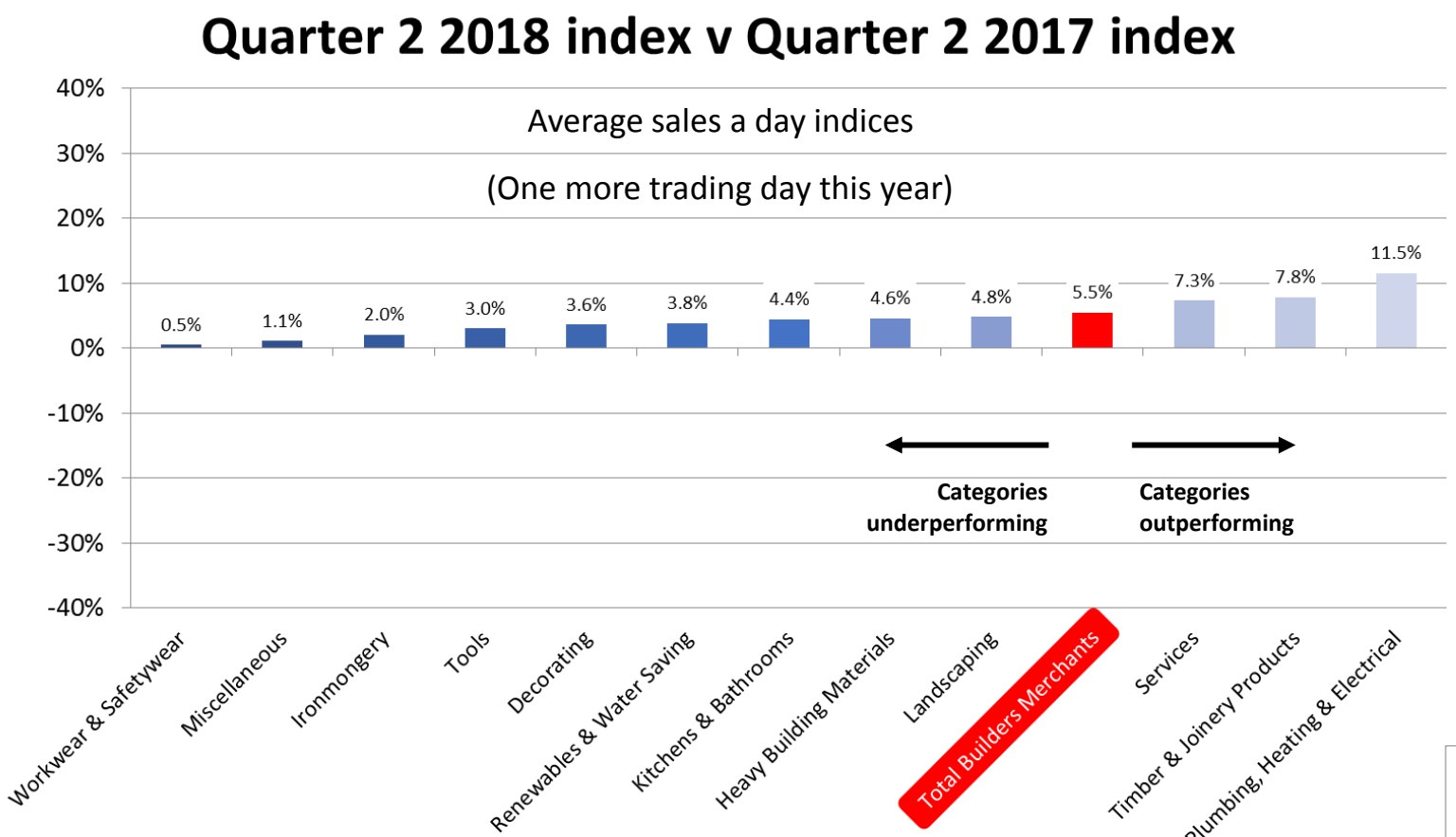



Source: GfK's Builders Merchants Total Category Report July 2015 to June 2018

# **Quarterly**: This Year v Last Year

## Q2 2018 average sales a day indices

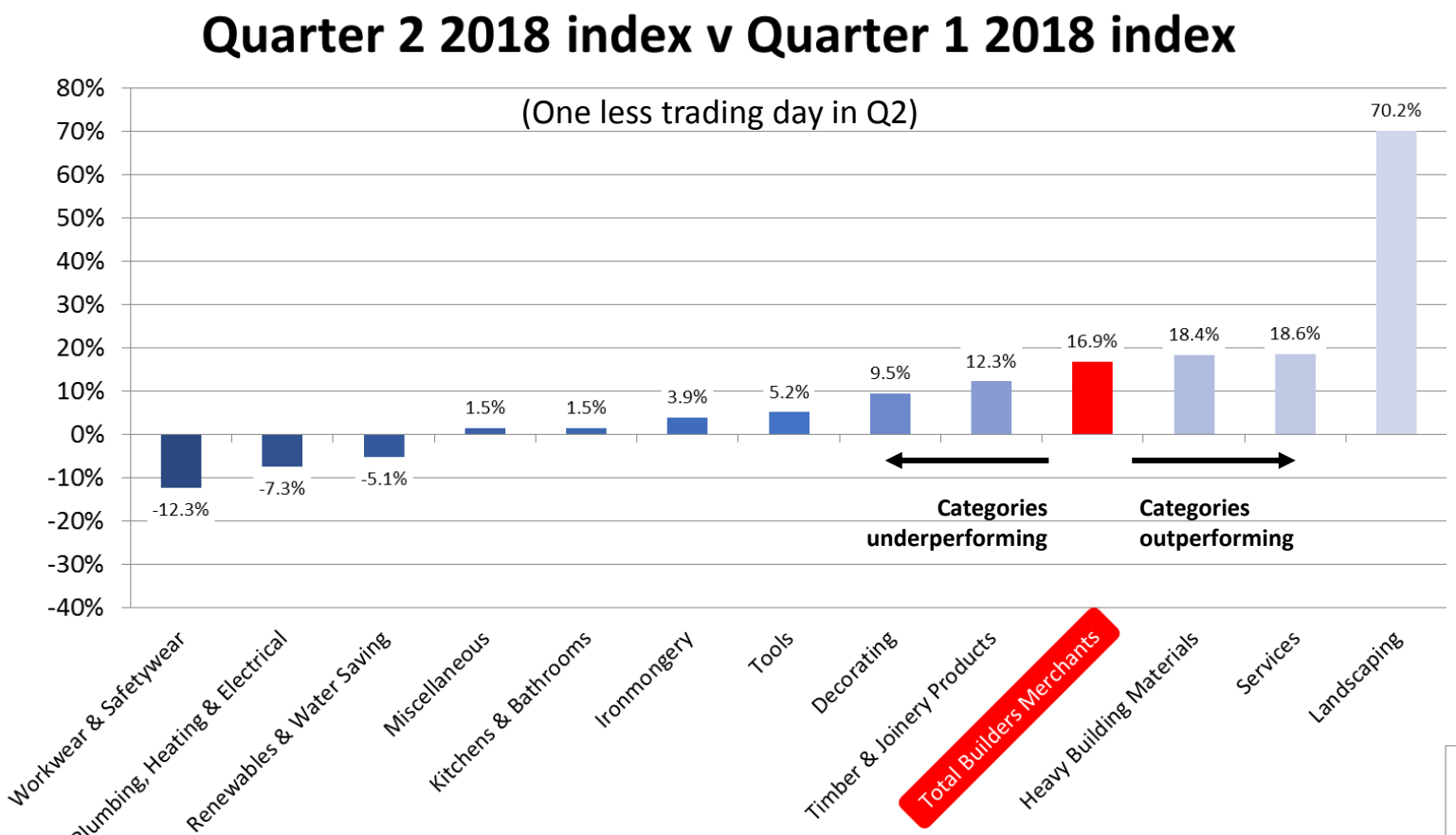
Builders Merchant Building Index




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

# **Quarterly**: Quarter on Quarter
## Q2 2018 sales indices

Builders Merchant Building Index

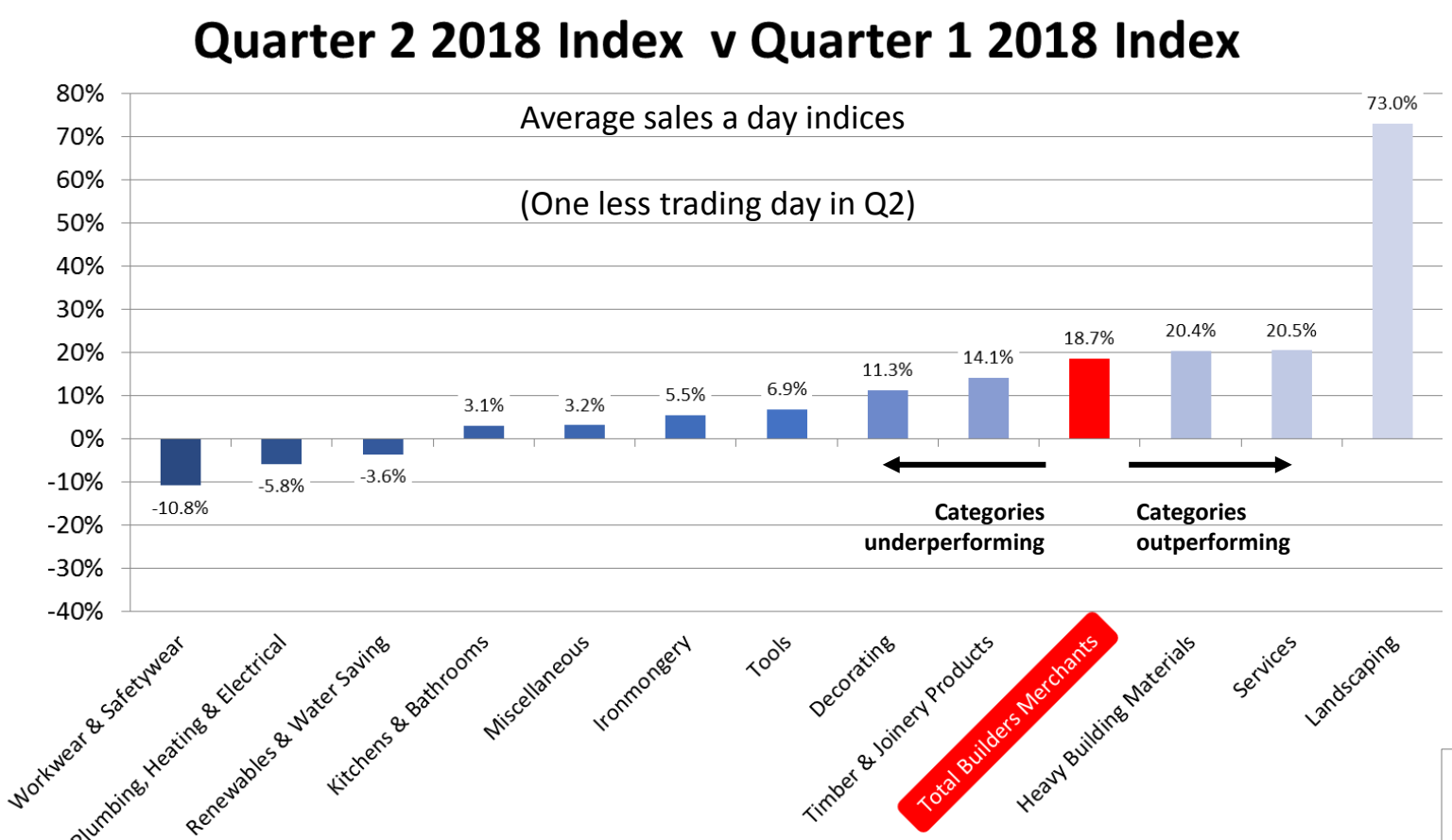



Source: GfK's Builders Merchants Total Category Report July 2015 to June 2018

# Quarterly: Quarter on Quarter

## Q2 2018 average sales a day indices

Builders Merchant Building Index

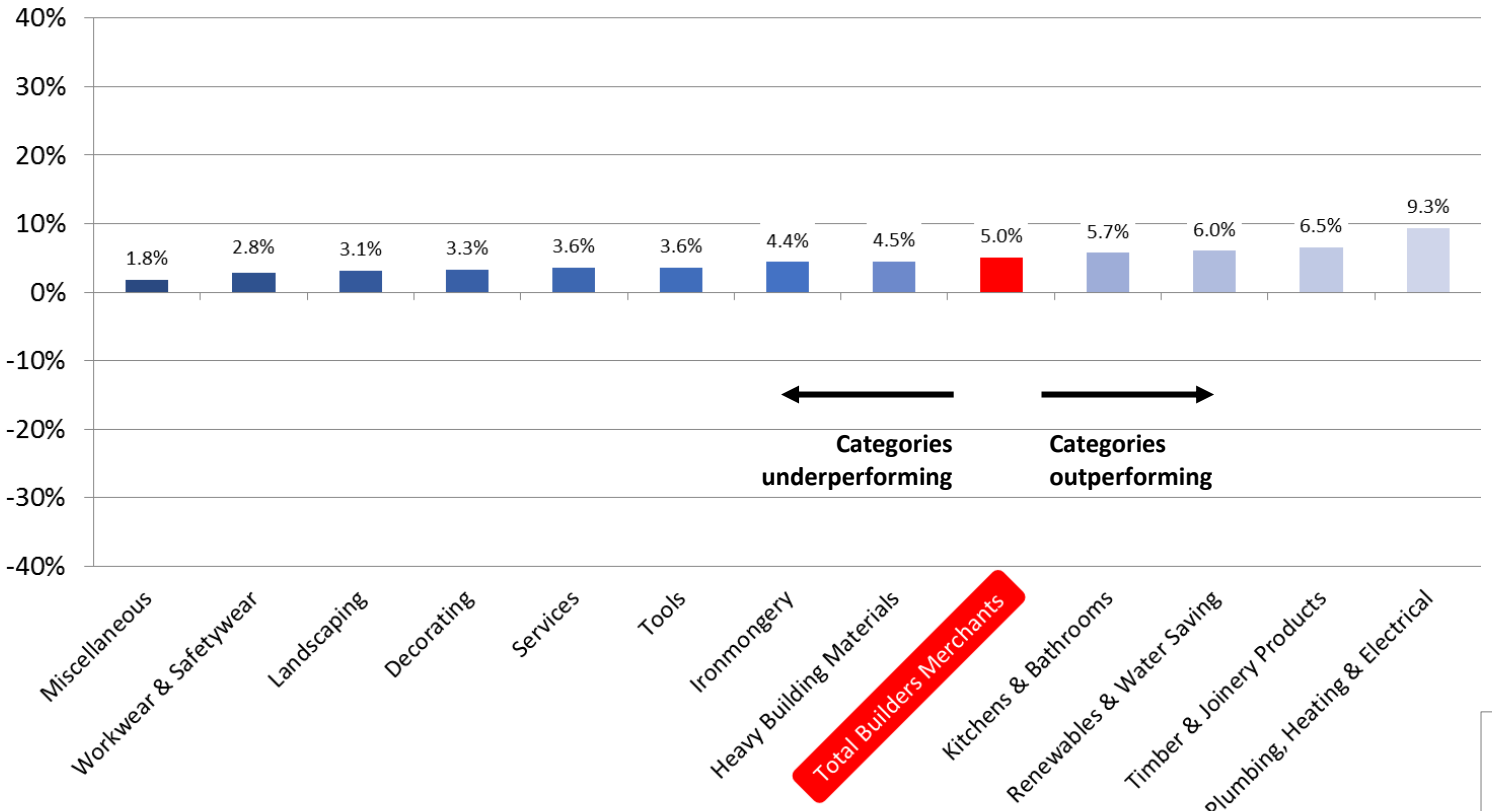



Source: GfK's Builders Merchants Total Category Report July 2015 to June 2018

# Last 12 Months: Year on Year

Builders Merchant Building Index

## 12 months Aug 17 to Jul 18 v 12 months Aug 16 to Jul 17

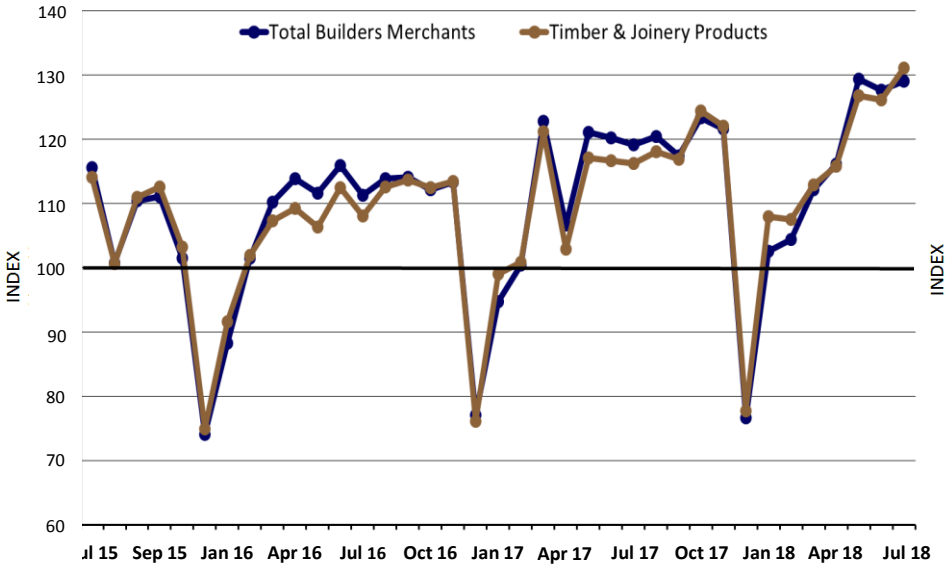



Source: GfK's Builders Merchants Total Category Report July 2015 to July 2018

# Monthly: Indices
## July 2018

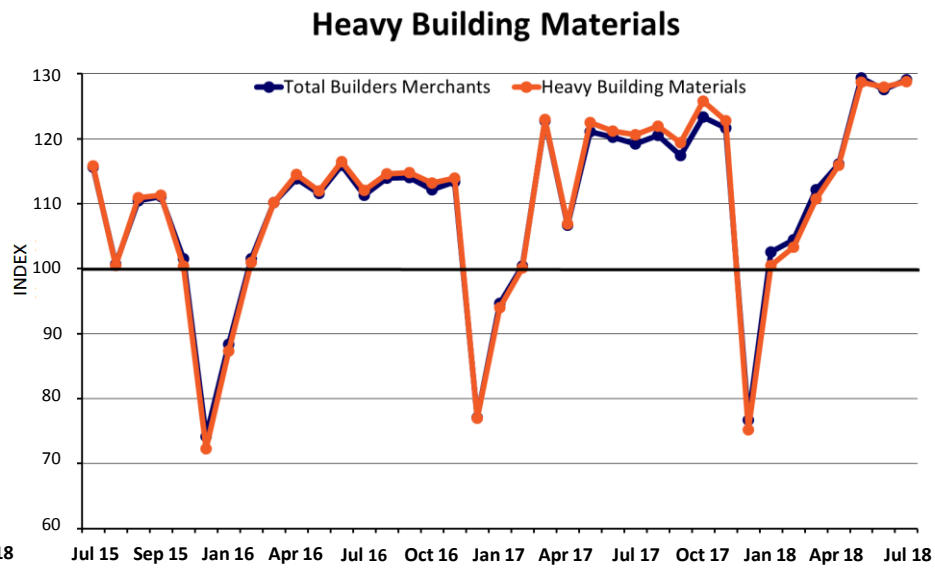
Builders Merchant Building Index

### Timber & Joinery Products




Indexed on July 2014 – June 2015

### Heavy Building Materials



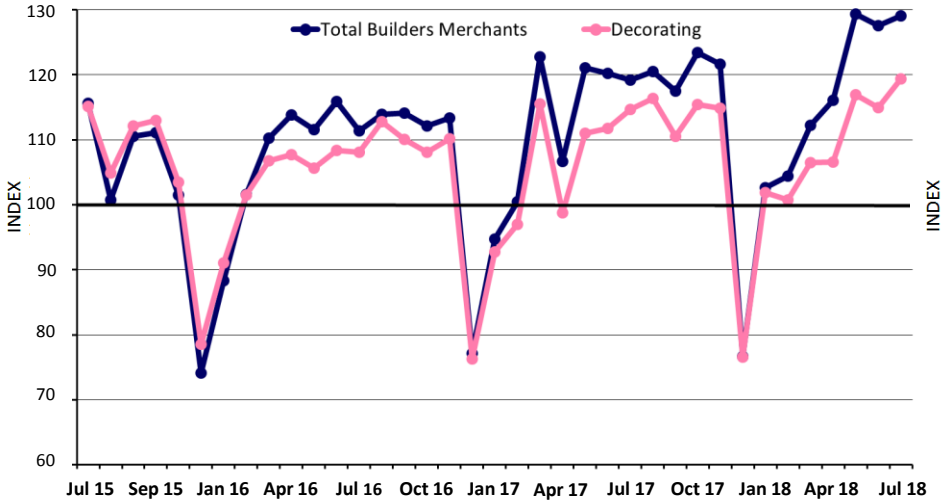

Indexed on July 2014 – June 2015

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

# Monthly: Indices
## July 2018

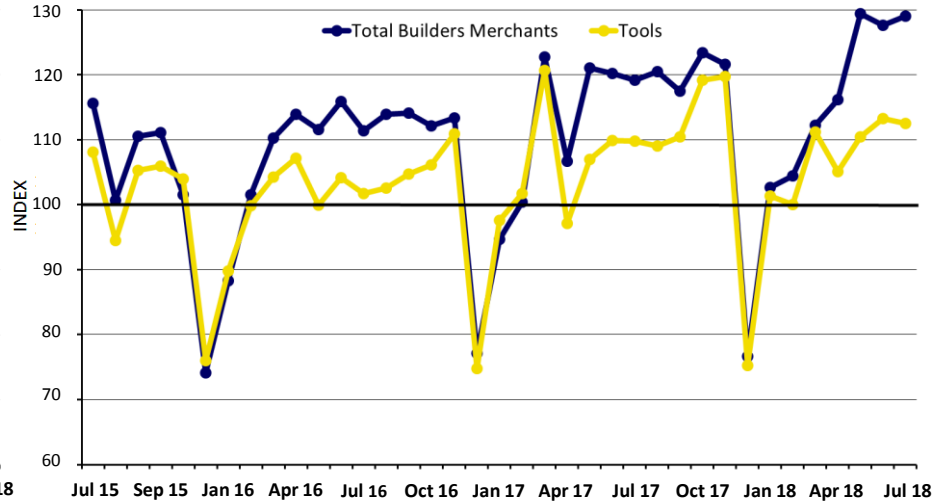
Builders Merchant Building Index

### Decorating




Indexed on July 2014 – June 2015

### Tools




Indexed on July 2014 – June 2015

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

# Monthly: Indices
## July 2018

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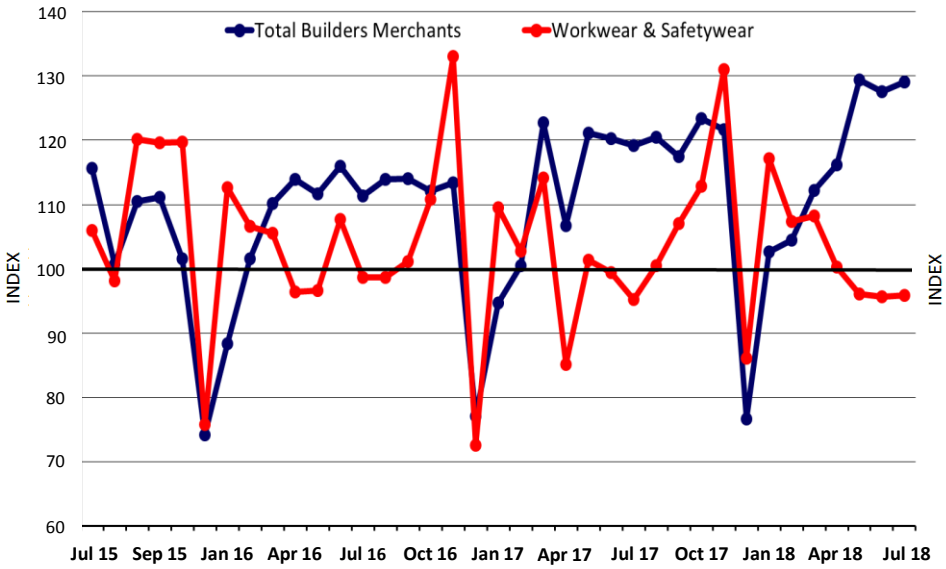
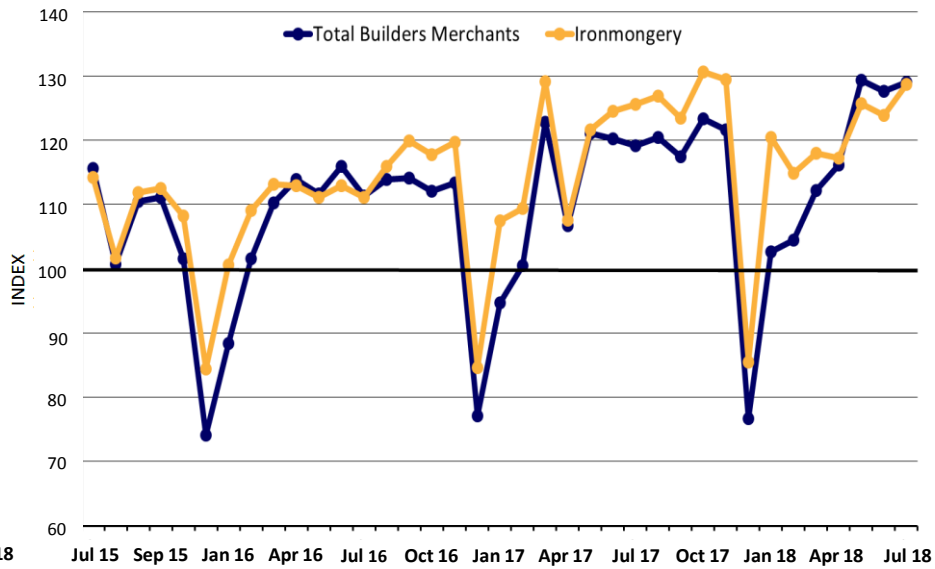
### Workwear & Safetywear




Indexed on July 2014 – June 2015

### Ironmongery




Indexed on July 2014 – June 2015

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

# Monthly: Indices
## July 2018

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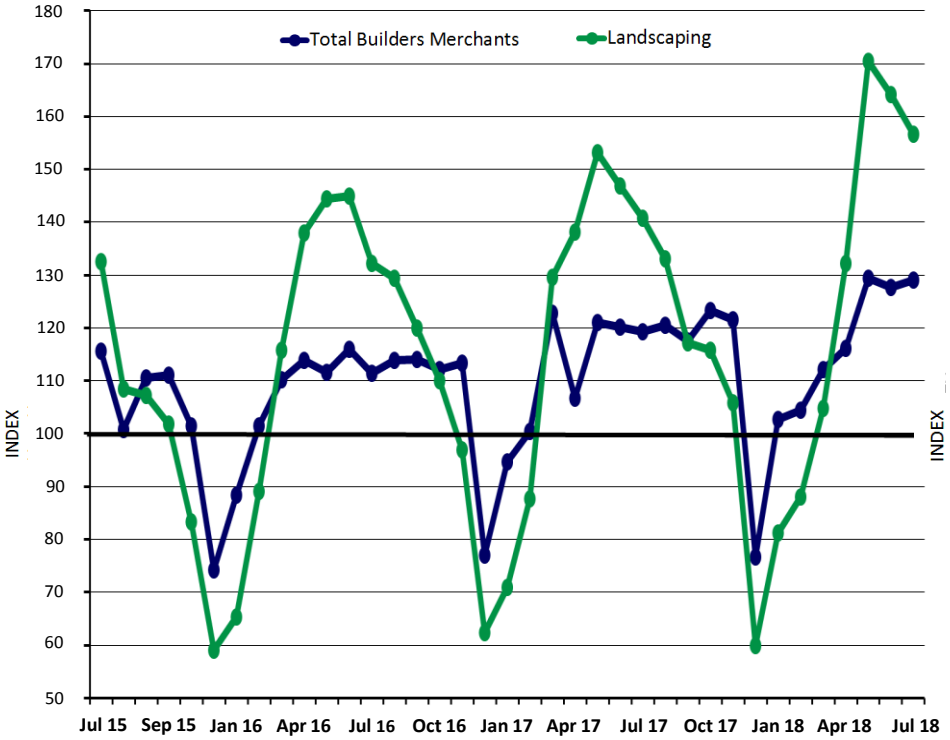
### Landscaping

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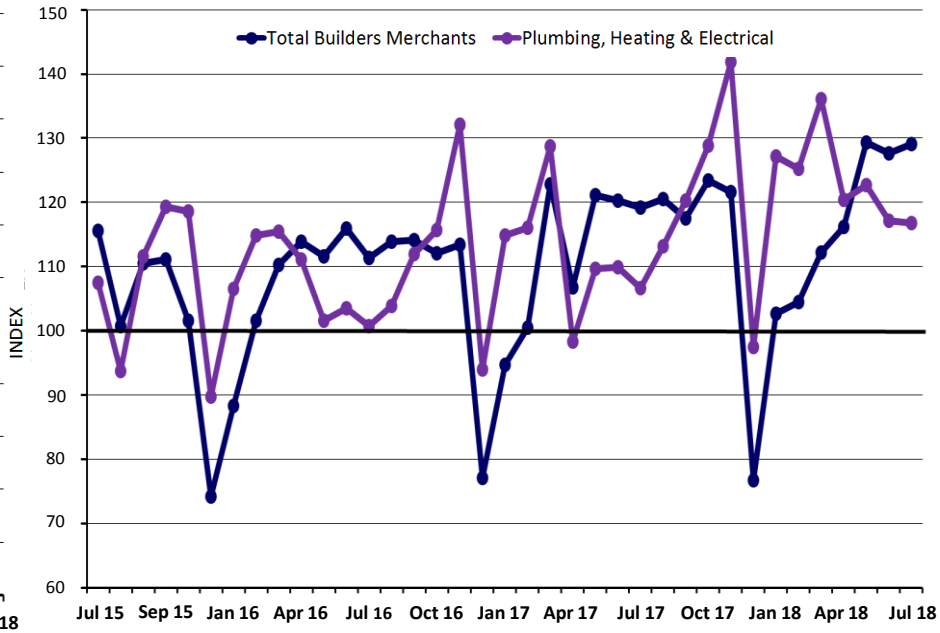
### Plumbing, Heating & Electrical




Indexed on July 2014 – June 2015

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

# Monthly: Indices
## July 2018

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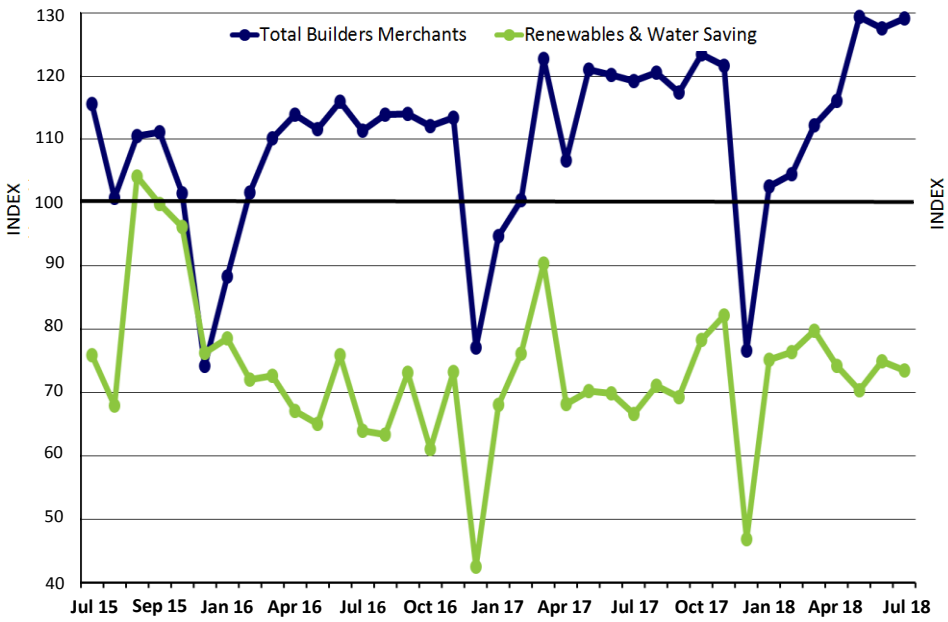
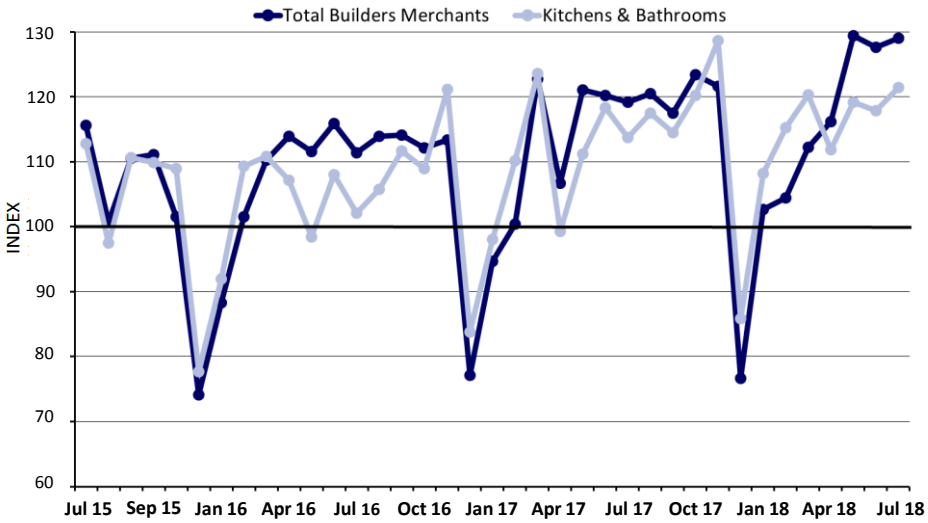
### Renewables & Water Saving




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 July 2018

# Monthly: Indices
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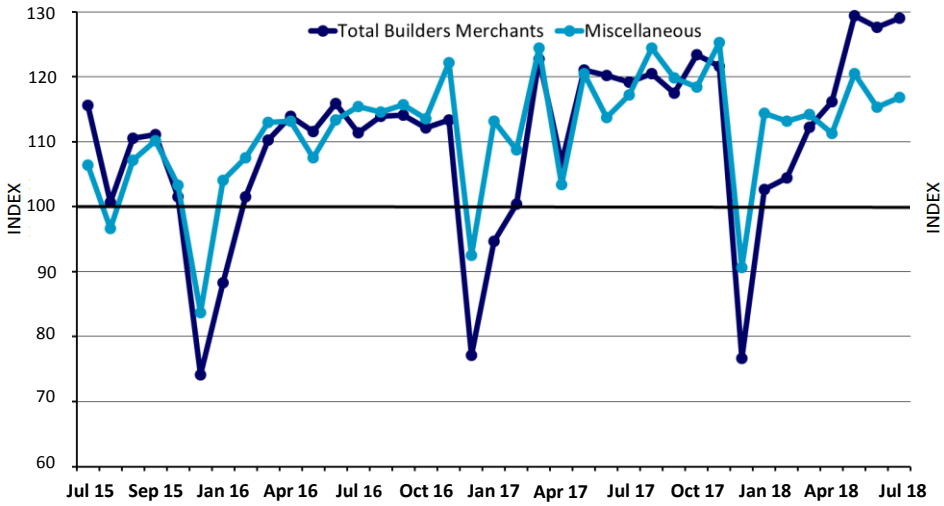
### Miscellaneous

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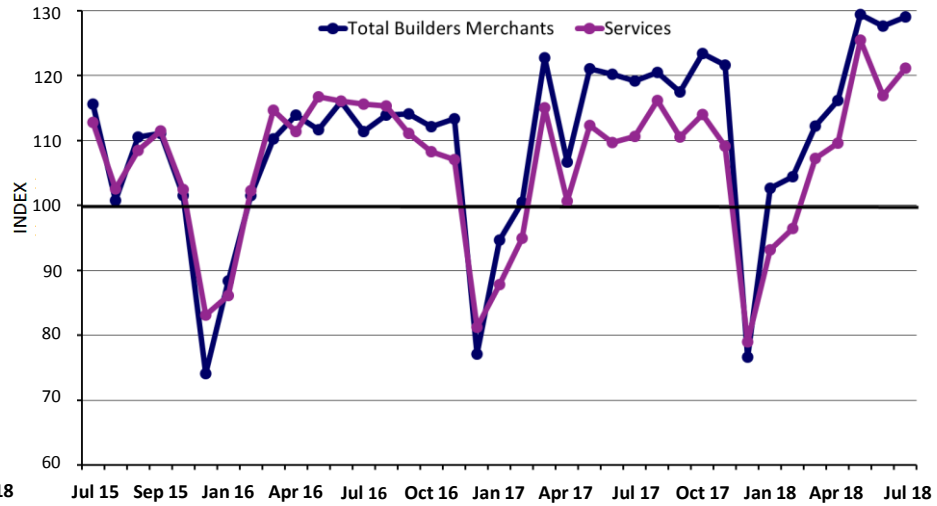
### Services

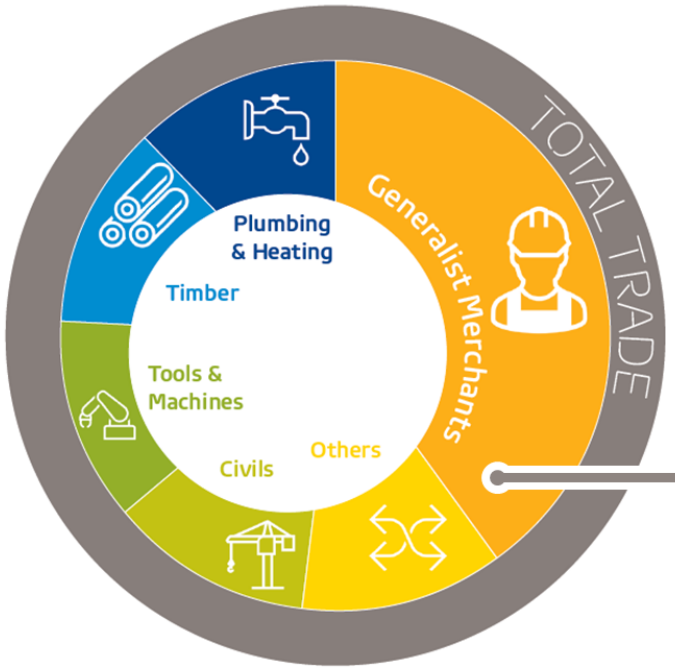



Indexed on July 2014 – June 2015

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

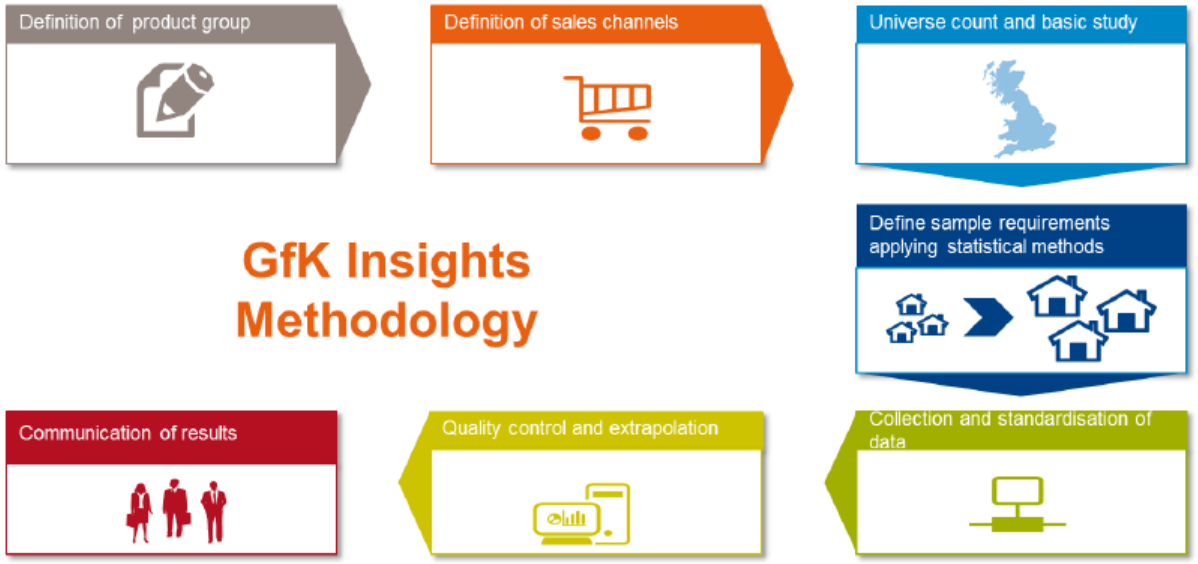
Multiple merchants are those defined as having more than 3 outlets or a turnover of greater than £3m p.a.

**Examples include:**

Travis Perkins
selco BUILDERS WAREHOUSE
JEWSON
BUILDBASE
EH Smith
MKM BUILDING SUPPLIES
gibbs & dandy
RIDGEONS Timber & Builders Merchants
Bradfords BUILDING SUPPLIES
COVERS Timber & Builders Merchants

© GfK

# 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

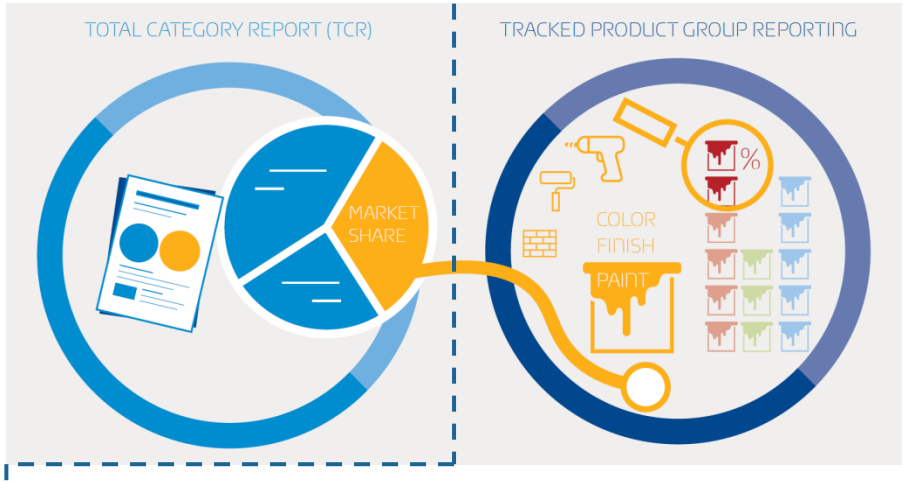
**Plumbing Heating & Electrical**
Plumbing Equipment
Boilers Tanks & Accessories
Heating Equipment/Water Heaters/Temperature Control/Air Treatment
Radiators And Accessories
Electrical Equipment
Lighting And Light Bulbs

**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

**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

Builders Merchant Building Index

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