

“one **industry**  
one **voice**”

# Builders Merchant Building Index



Monthly report for August 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 Q2 report.

**Monthly and Quarterly Indices**  
June 2018 and Q2 2018

**Builders Merchant Building Index**

**Landscaping - Quarterly**

**GfK's Product Categories**  
Cover category headline values & in-depth, rel insights

**Macro factors impacting Merchants**

**New house builds Quarterly**

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

**In-depth product group reporting**

**Steve Durdant-Hollamby, Managing Director Alumasac Water Management Solutions (AWMS)**  
is BMBI's Expert for Civils, Metal Rainwater & Drainage.

**ALUMASAC**  
Water Management Solutions

**It's been a positive three months for infrastructure and social housing. However housing in these sectors is being hit by the slowdown in the commercial sector. It continues to be a humpy ride for our market and construction overall.**

# 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: 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](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

## Merchants' August sales boosted by Timber & Joinery, and Landscaping

### Year on year

Total Builders Merchant value sales were up 3.5% in August compared with August 2017. Two categories did better, Timber & Joinery Products (+9.5%) and Landscaping (+6.9%).

Heavy Building Materials (+1.6%) and Plumbing Heating & Electrical (+1.2%) were among six categories that grew more slowly. Four categories sold less this year.

### Month on month

Overall August sales were 3.4% lower than July, including Decorating (-1.9%) and Kitchens & Bathrooms (-2.5%). Only Workwear & Safetywear (+2.5%) sold more than in July.

### Other periods

The first eight months of 2018 were 4.5% ahead of the same period in 2017, with one additional trading day this year. Plumbing Heating & Electrical (+9.2%) did best, with Timber & Joinery Products (+7.3%) also strong. Landscaping (+3.9%) and Heavy Building Materials (+3.3%) were among nine categories that grew more slowly.

Average sales a day for January to August (which takes the difference in trading days into account) were up 3.9% on the same months last year.

The rolling 12 months September 2017 to August 2018 were 4.8% above the same 12 months a year earlier. Plumbing Heating & Electrical (+8.7%) was strongest, followed by Timber & Joinery Products (+6.9%). All categories sold more.

### Index

August's BMBI index was 124.7, with one additional trading day. Seasonal category Landscaping was top (142.4) followed by Timber & Joinery Products (129.3) and Ironmongery (124.4). Ten of the 12 categories exceeded 100.

The average sales a day index for August was 117.6.

Total Builders Merchant value sales were up 3.5% in August compared with August 2017 but were down 3.4% on July.

# 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**

[Read latest Comment: Q2 2018 Report](#)



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



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

[Read latest Comment: Q2 2018 Report](#)



**John Duffin**  
Managing Director  
Keylite Roof Windows



**Expert for Roof Windows**

[Read latest Comment: Q2 2018 Report](#)



**Andrew Simpson**  
National Commercial Director  
Hanson Cement



**Expert for Cement & Aggregates**

[Read latest Comment: Q2 2018 Report](#)



**Nigel Cox**  
Managing Director  
Timbmet



**Expert for Timber & Panel Products**

[Read latest Comment: Q2 2018 Report](#)



**Paul Owen**  
Commercial Director Distribution  
IKO PLC



**Expert for Roofing Products**

[Read latest Comment: Q2 2018 Report](#)

# The Expert Panel

## Speaking for their markets - 2



**Derrick McFarland**  
Managing Director  
Keystone Lintels

**Expert for Steel Lintels**



[Read latest Comment: Q2 2018 Report](#)



**Tony France**  
Sales Director  
Ibstock

**Expert for Bricks**



[Read latest Comment: Q2 2018 Report](#)



**John Sinfield**  
Managing Director  
Knauf Insulation

**Expert for Mineral Wool Insulation**



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**Paul Rivett**  
Managing Director  
Heatrae Sadia

**Expert for Water Heating**



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**Mike Beard**  
Merchant Development  
Director  
Encon Insulation

**Expert for Insulation Products -  
Distribution**



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

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



[Read latest Comment: Q2 2018 Report](#)



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

**Expert for Paint**



[Read latest Comment: Q2 2018 Report](#)



**Mike Tattam**  
Sales & Marketing Director  
Lakes

**Expert for Shower Enclosures and  
Showering**



[Read latest Comment: Q2 2018 Report](#)



# Monthly: Index and Categories

## August 2017\* – August 2018

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



MONTHLY SALES VALUE INDEX	Index	2017					2018							
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
<b>Total Builders Merchants</b>	<b>100</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>	<b>127.6</b>	<b>129.1</b>	<b>124.7</b>
Timber & Joinery Products	100	117.3	116.9	124.4	122.1	77.8	108.0	107.6	112.9	115.9	126.7	126.2	131.1	129.3
Heavy Building Materials	100	121.6	119.4	125.8	122.8	75.2	100.5	103.3	110.8	115.9	128.7	128.0	128.8	123.9
Decorating	100	115.6	110.5	115.4	114.9	76.6	101.9	100.8	106.5	106.6	117.0	114.9	119.4	117.2
Tools	100	110.8	110.4	119.2	119.8	75.3	101.3	100.0	111.2	105.1	110.5	113.3	112.5	109.7
Workwear & Safetywear	100	96.2	107.0	112.9	131.0	86.1	117.2	107.3	108.3	100.2	96.0	95.7	95.9	98.3
Ironmongery	100	126.6	123.4	130.6	129.5	85.5	120.4	114.8	118.0	117.3	125.7	123.9	128.8	124.4
Landscaping	100	141.8	117.1	115.8	105.8	60.0	81.3	88.0	104.8	132.1	170.4	164.1	156.6	142.4
Plumbing, Heating & Electrical	100	107.6	120.3	128.9	141.9	97.4	127.2	125.2	136.1	120.4	122.7	117.1	116.8	114.5
Renewables & Water Saving	100	67.6	69.2	78.3	82.2	46.8	75.2	76.3	79.8	74.2	70.4	75.0	73.5	64.8
Kitchens & Bathrooms	100	114.7	114.5	120.2	128.6	85.9	108.2	115.2	120.3	111.9	119.2	117.8	121.4	118.4
Miscellaneous	100	118.2	119.8	118.4	125.3	90.7	114.4	113.2	114.2	111.3	120.5	115.3	116.8	113.9
Services	100	111.6	110.6	114.0	109.2	79.0	93.1	96.4	107.3	109.6	125.4	116.9	121.1	120.1

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

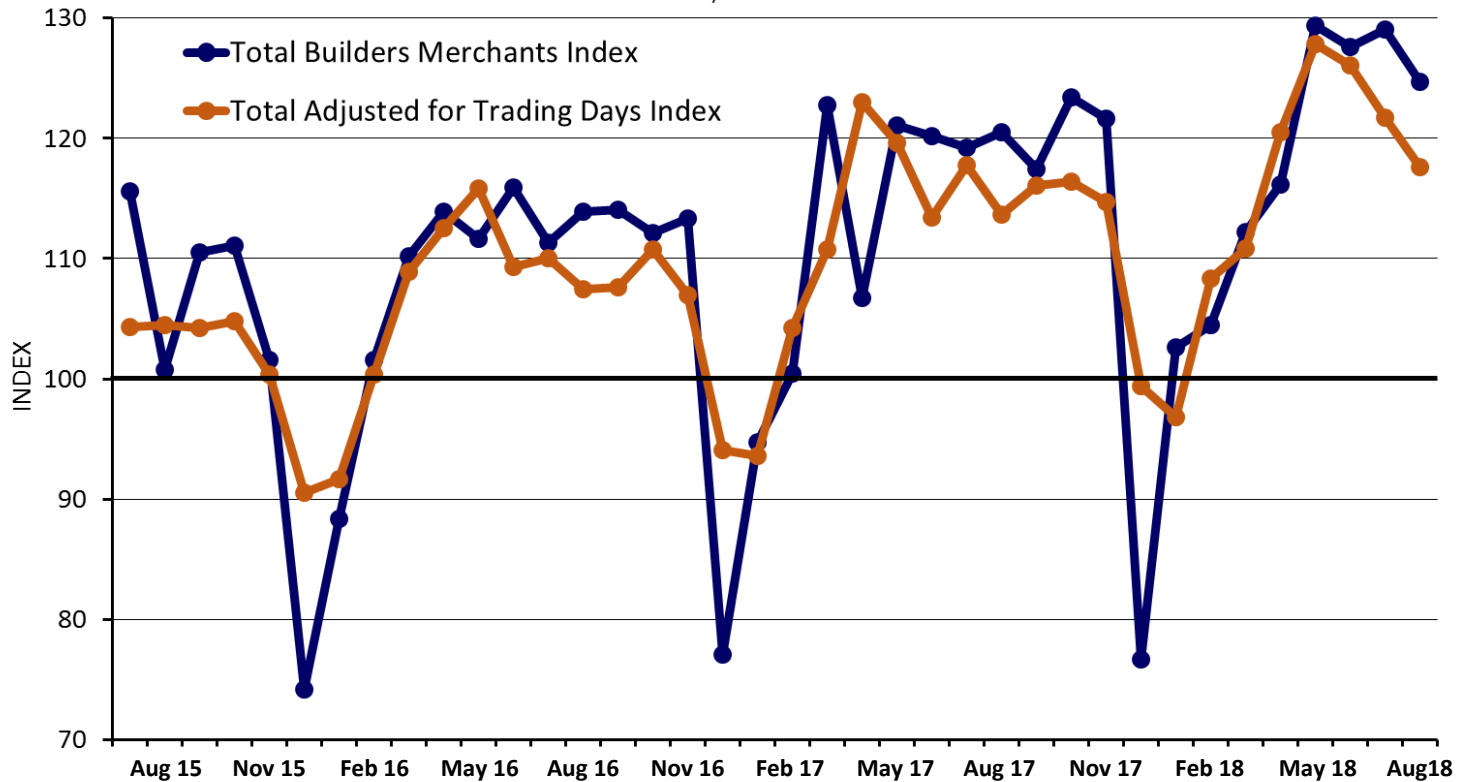

 Source: GfK's  
 Builders Merchants  
 Total Category Report  
 July 2015 to August 2018

# 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



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 22

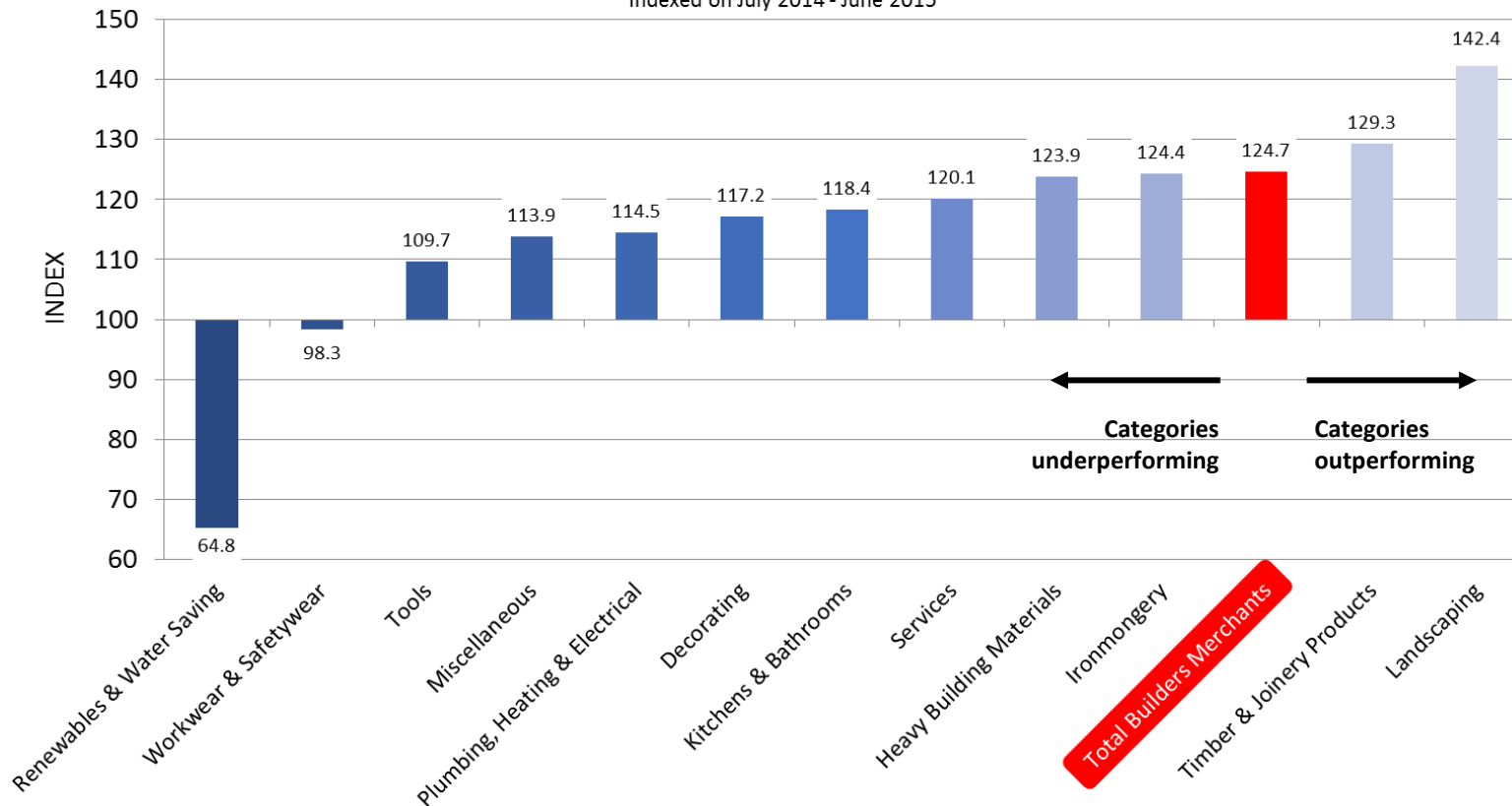
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to August 2018

# Monthly: Index and Categories

## August 2018 index

### August 2018 Index

Indexed on July 2014 - June 2015

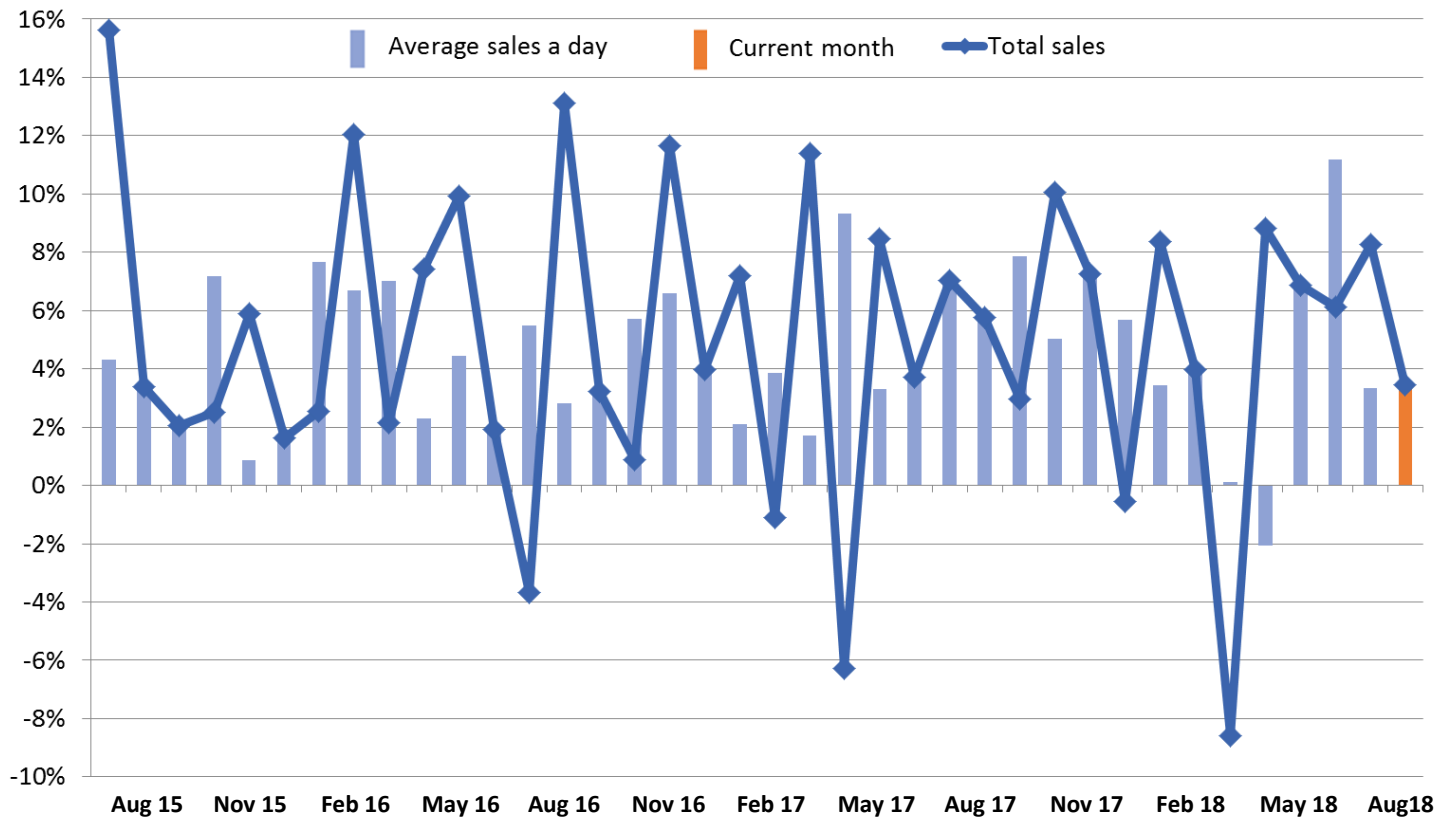


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to August 2018

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year



Trading days:

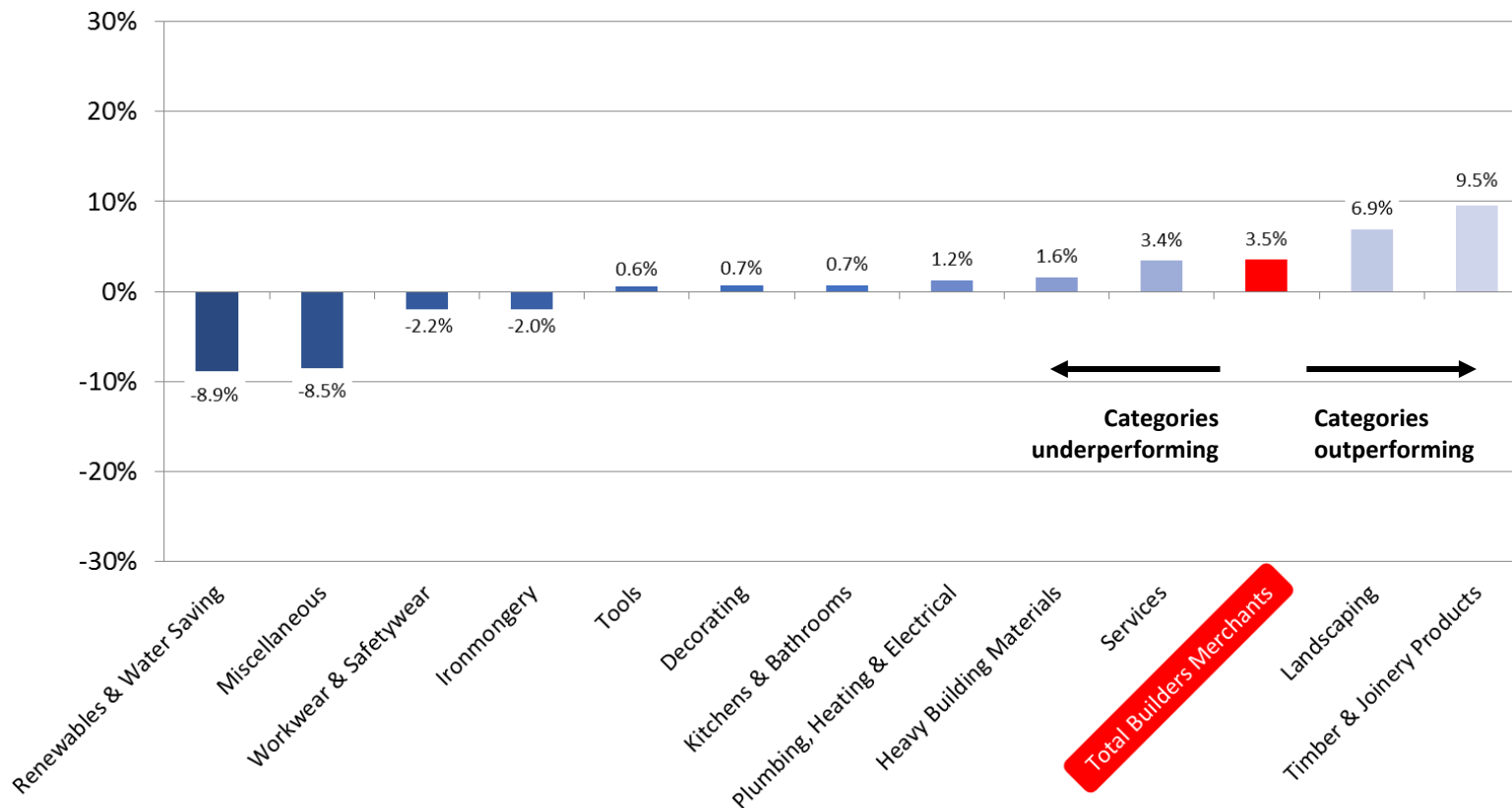
Index Months: 20.8 23 20 22 22 21 17 20 21 21 21 20 22 21 22 22 21 22 17 21 21 20 23 18 21 22 21 22 21 22 22 16 22 20 21 20 21 22 22

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

# Monthly: This Year v Last Year

## August 2018 sales indices

### August 2018 index v August 2017 index

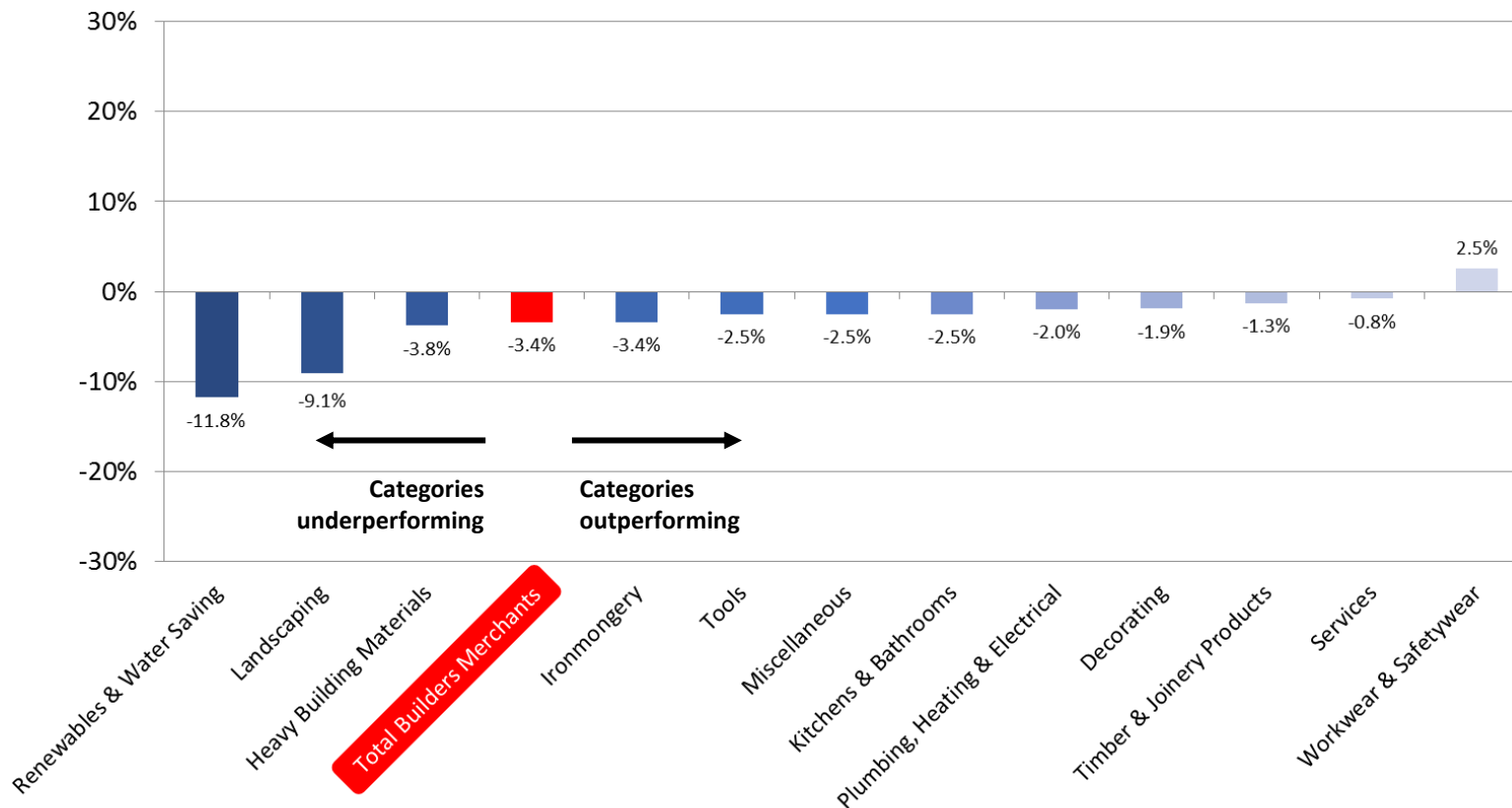


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to August 2018

# Monthly: This Month v Last Month

## August 2018 sales indices

### August 2018 index v July 2018 index



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

# Quarterly: Index and Categories

## Quarter 2 2017\* to Quarter 2 2018

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q2 2017	Q3 2017	Q4 2017	Q1 2018	Q2 2018
<b>Total Builders Merchants</b>	<b>100</b>	<b>116.0</b>	<b>119.1</b>	<b>107.2</b>	<b>106.4</b>	<b>124.4</b>
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.

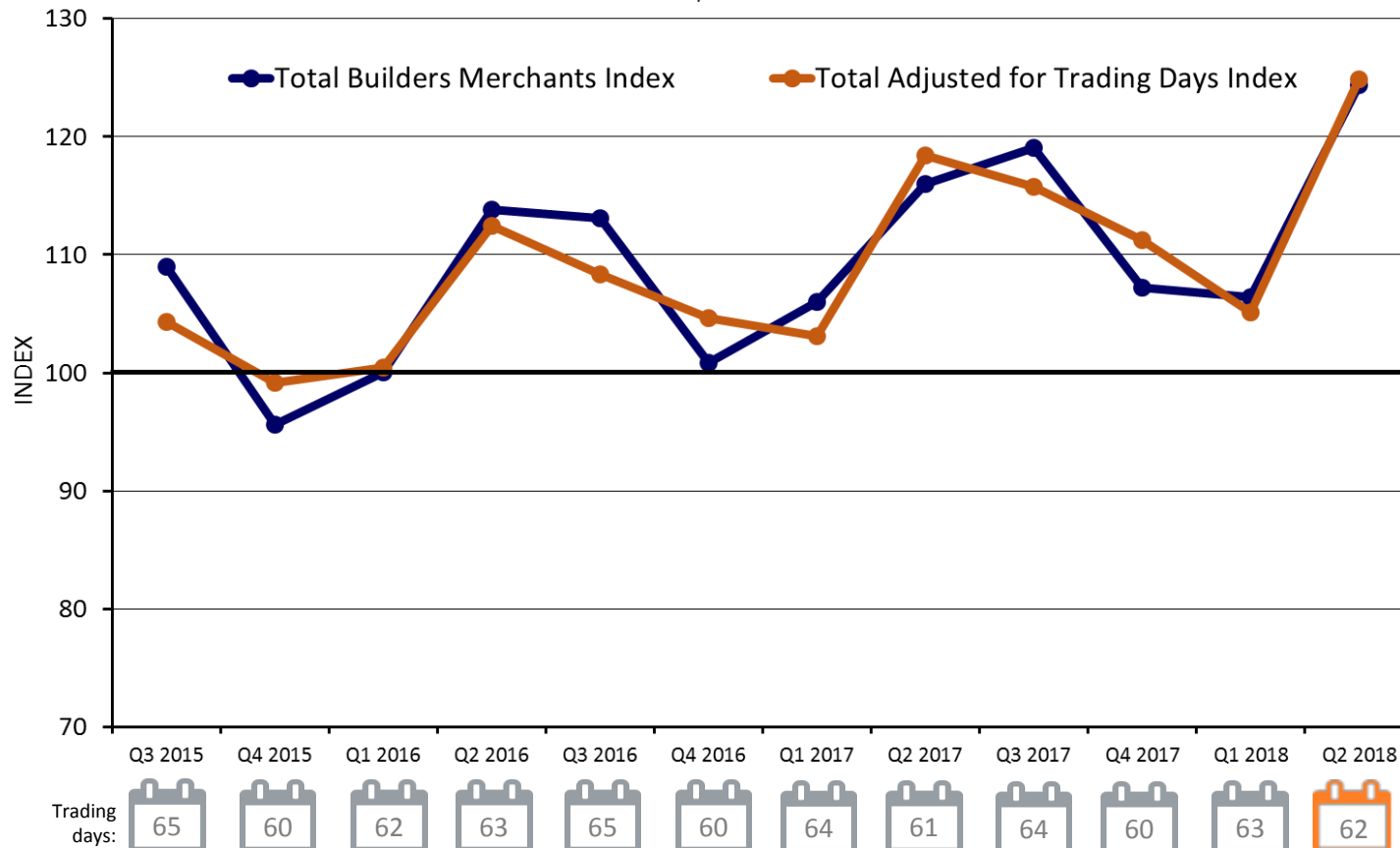
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2018

# 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 June 2018

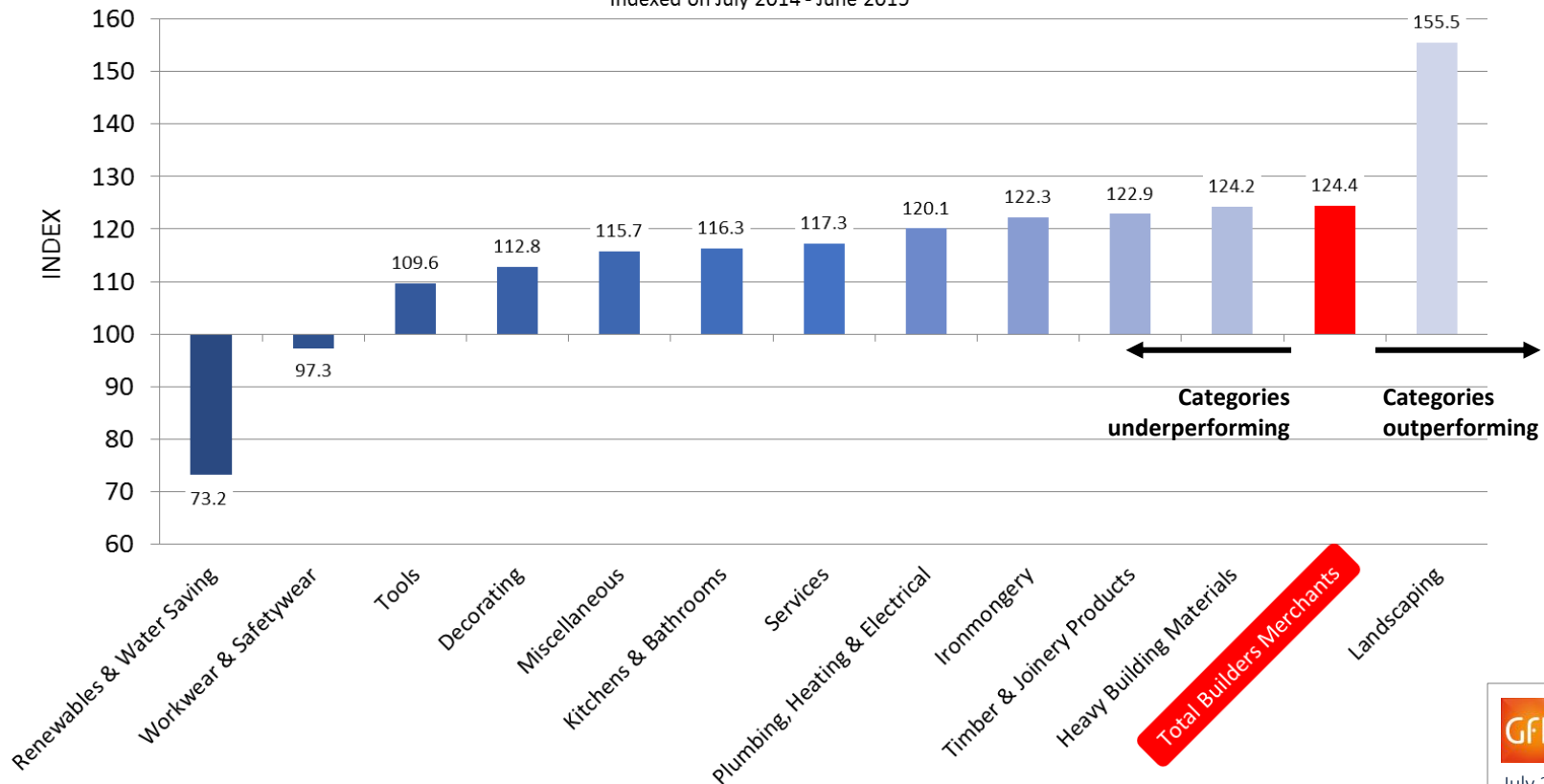


# Quarterly: Index and Categories

## Q2 2018 index

### Quarter 2 2018

Indexed on July 2014 - June 2015



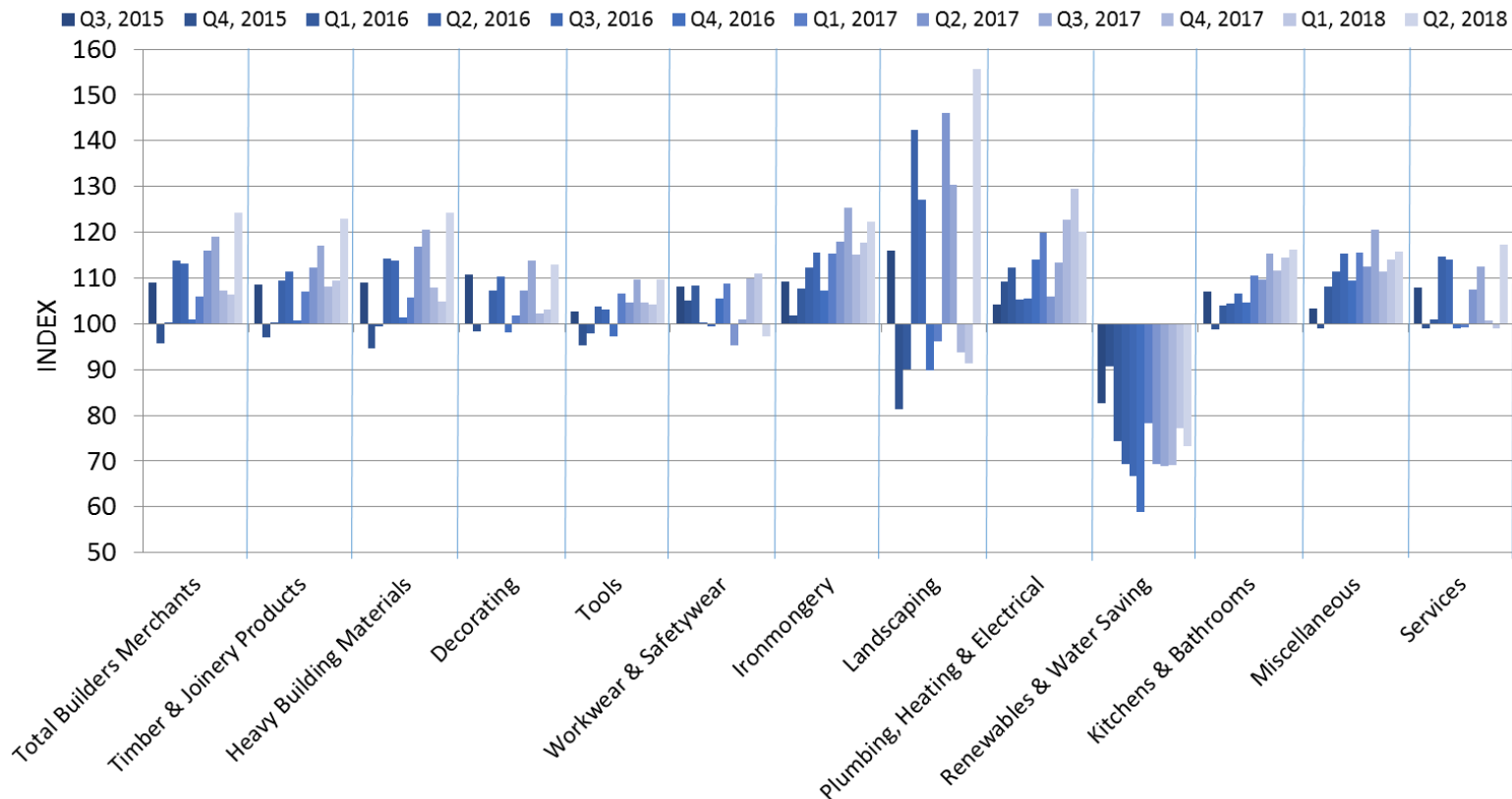
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2018

# Quarterly: Index and Categories

## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

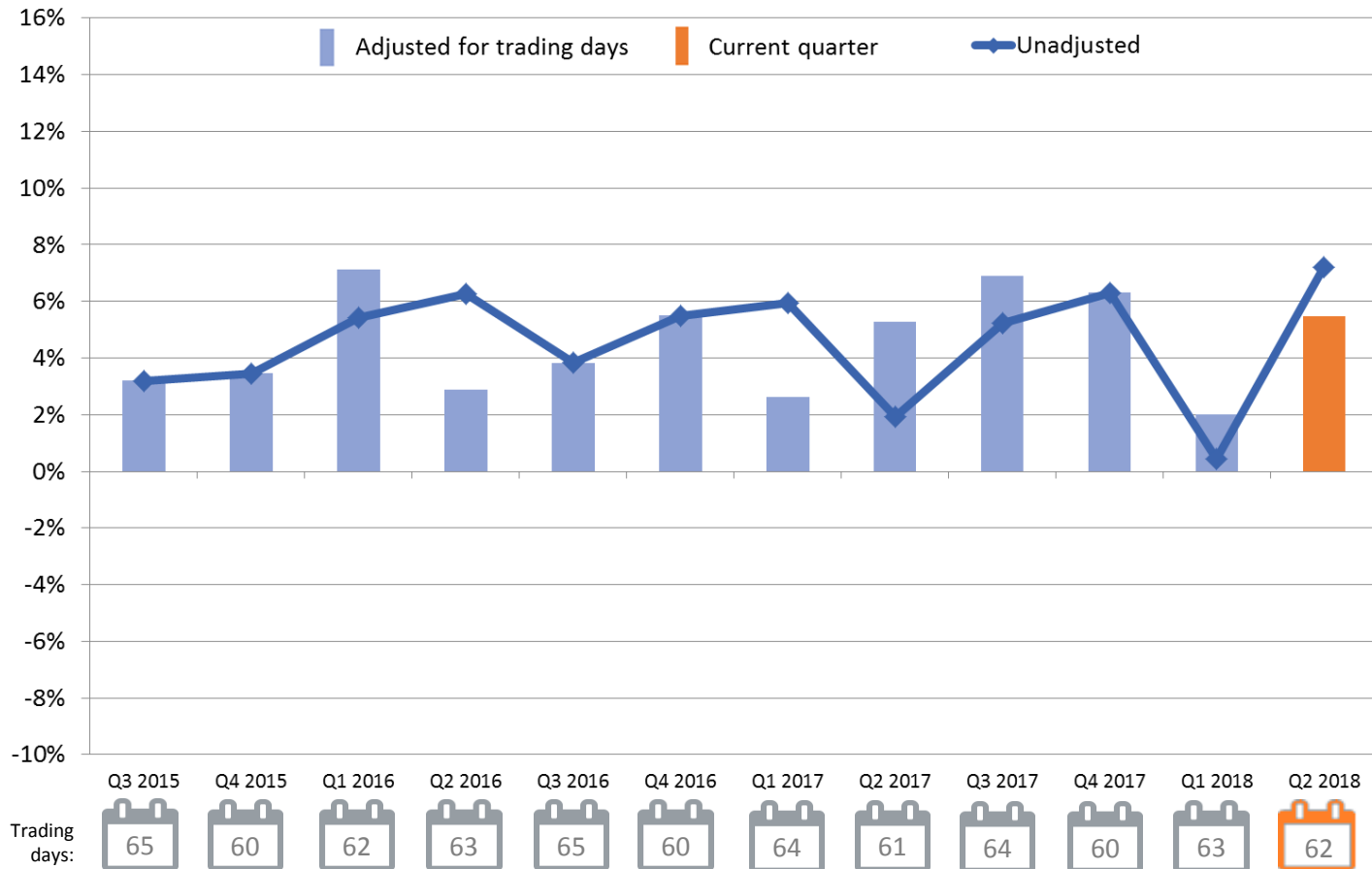


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2018

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

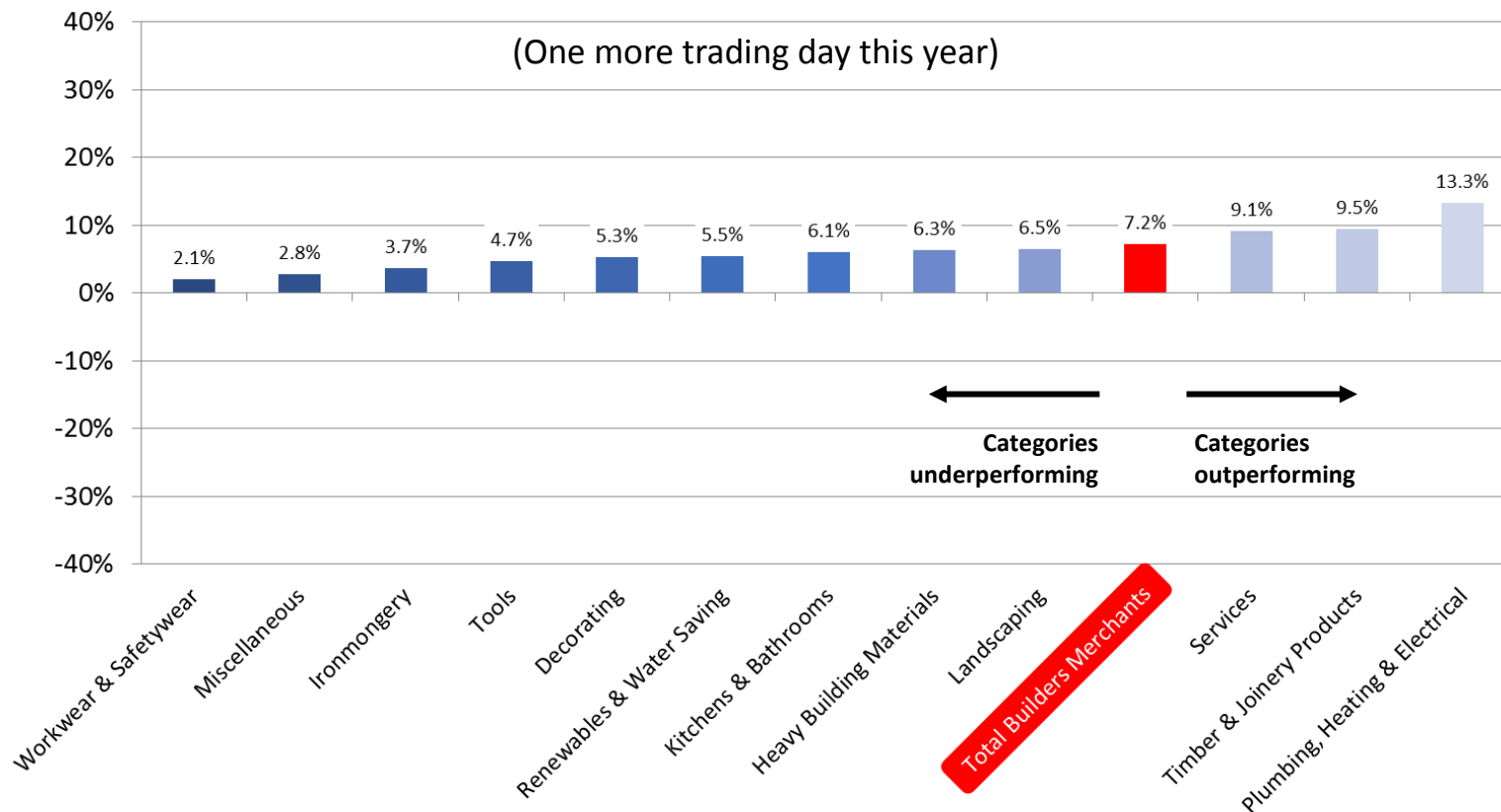


 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2018

# Quarterly: This Year v Last Year

## Q2 2018 sales indices

### Quarter 2 2018 index v Quarter 2 2017 index

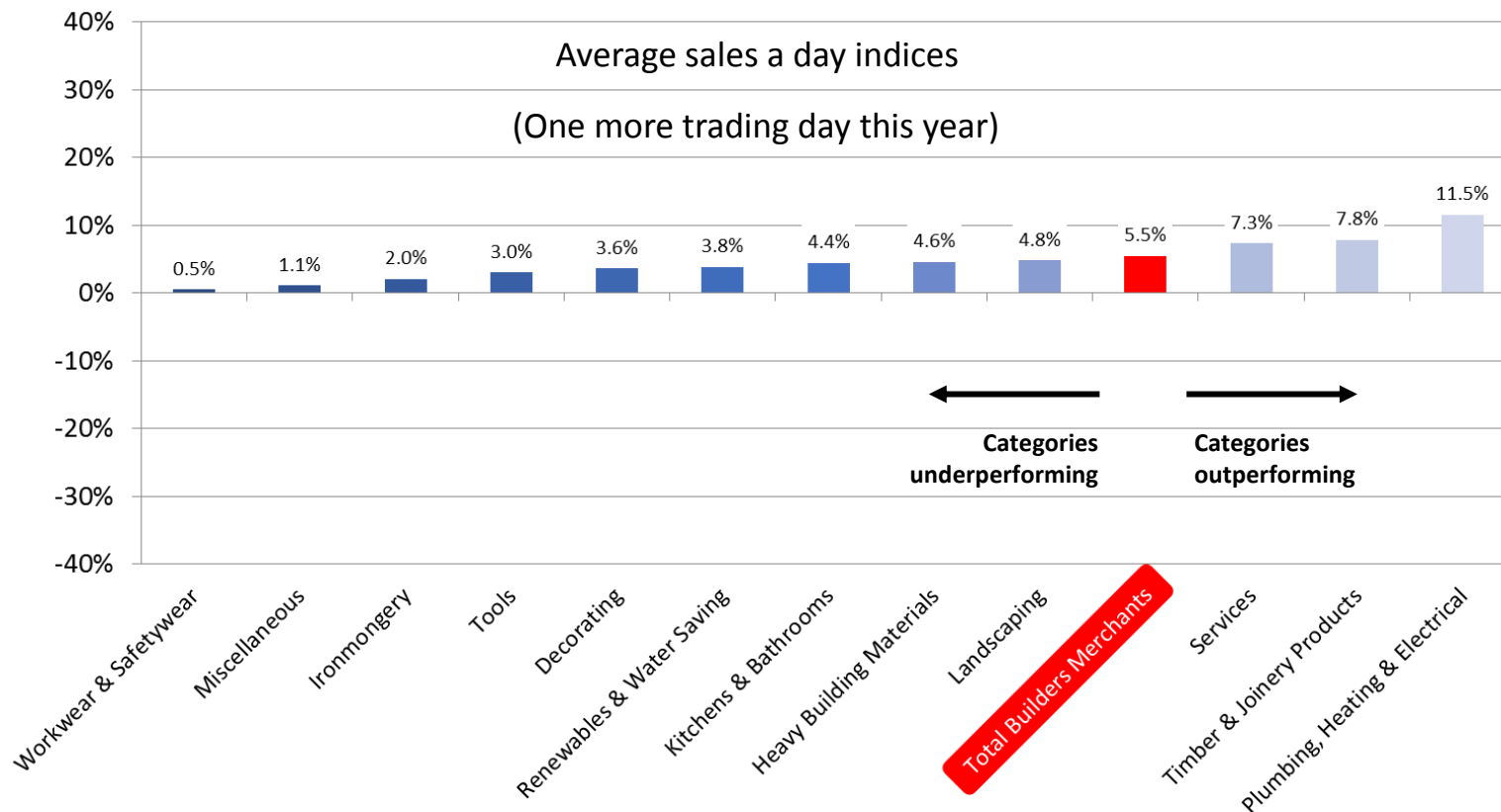


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2018

# Quarterly: This Year v Last Year

## Q2 2018 average sales a day indices

### Quarter 2 2018 index v Quarter 2 2017 index



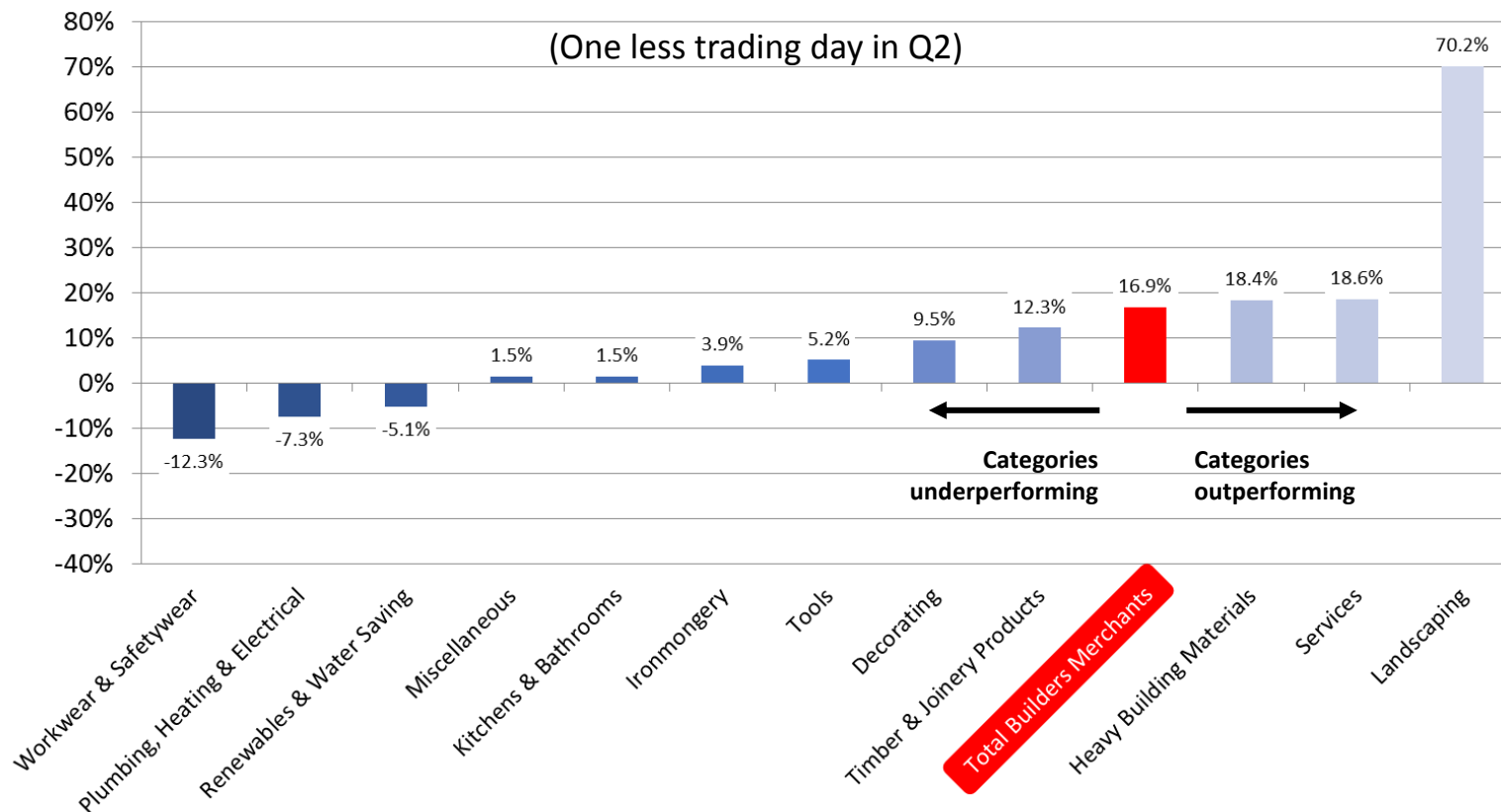
 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2018

# Quarterly: Quarter on Quarter

## Q2 2018 sales indices

### Quarter 2 2018 index v Quarter 1 2018 index

(One less trading day in Q2)

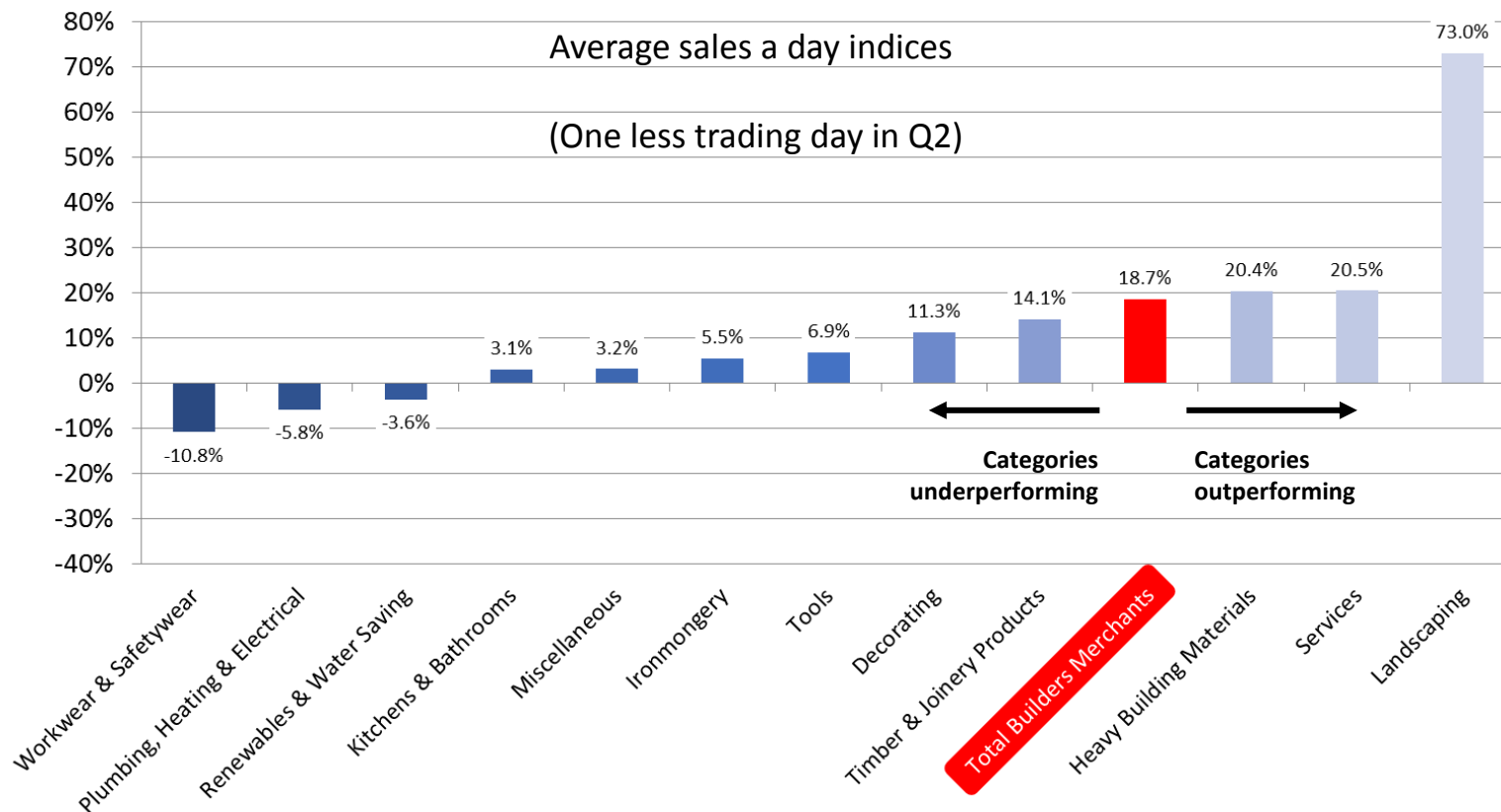


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2018

# Quarterly: Quarter on Quarter

## Q2 2018 average sales a day indices

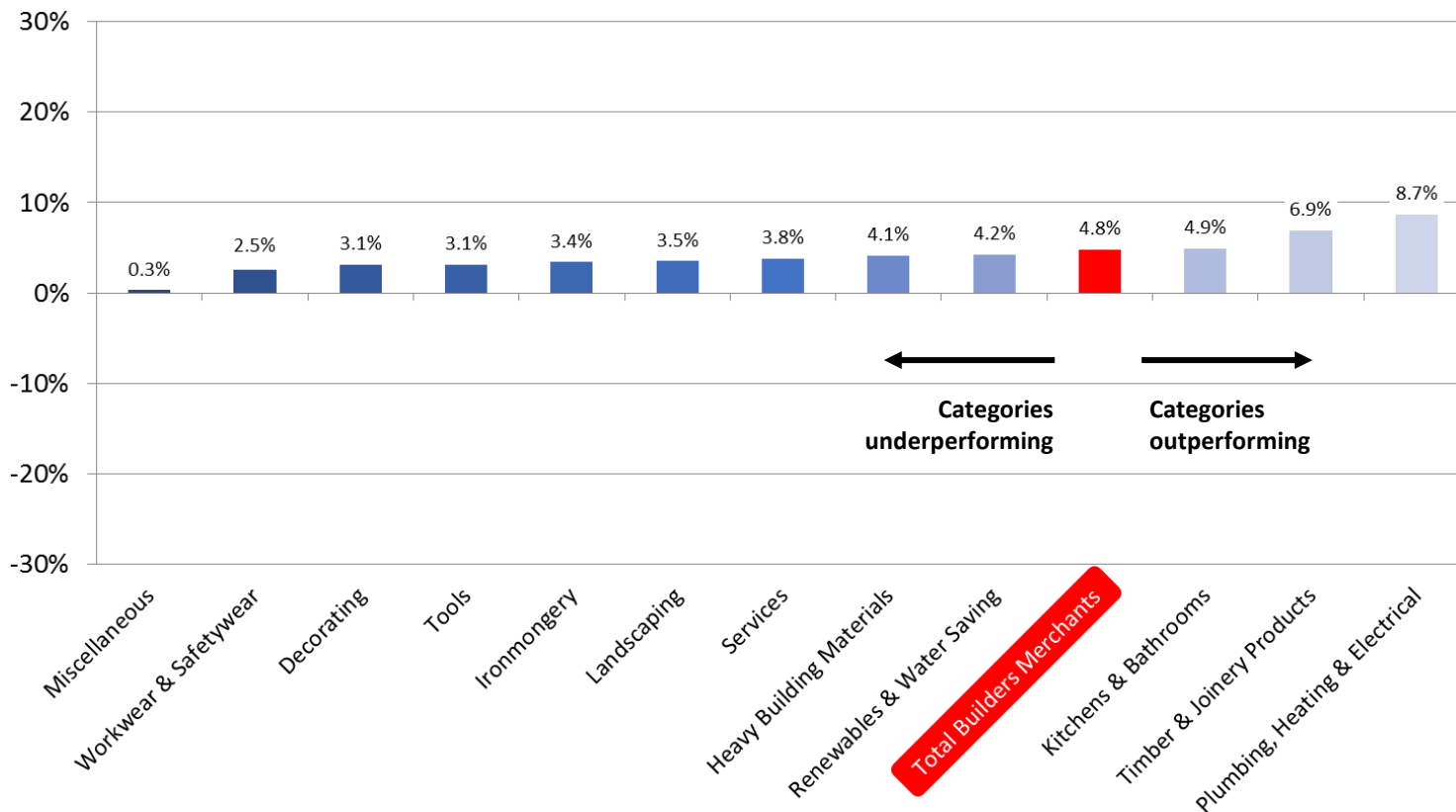
### Quarter 2 2018 Index v Quarter 1 2018 Index



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

# Last 12 Months: Year on Year

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



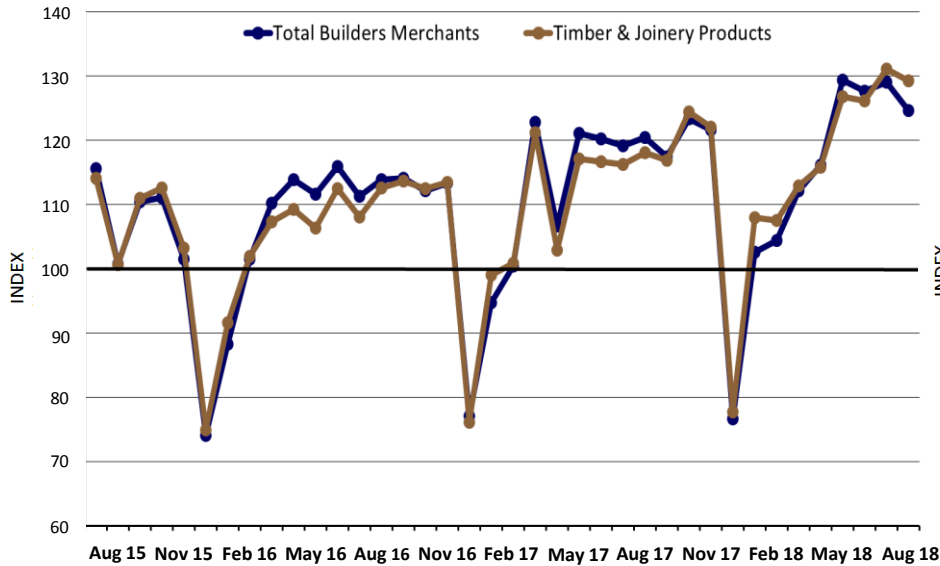
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to August 2018



# Monthly: Indices

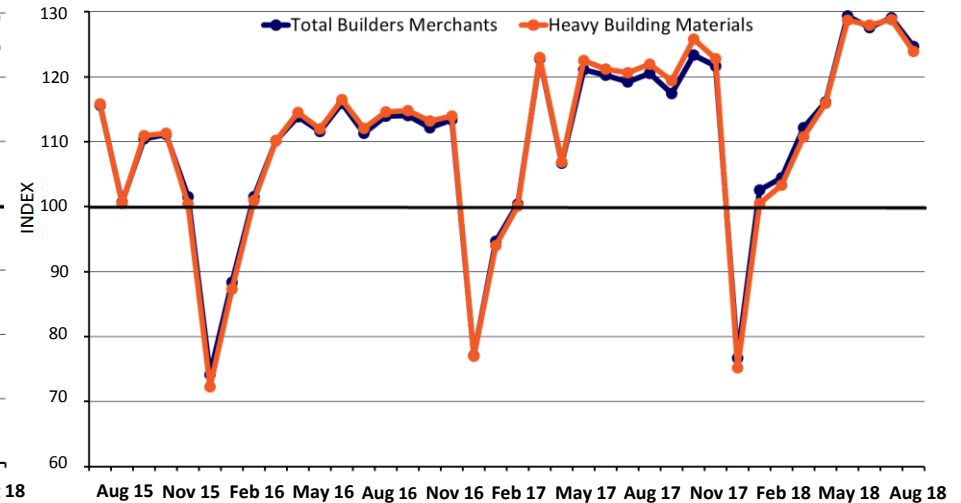
## August 2018

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



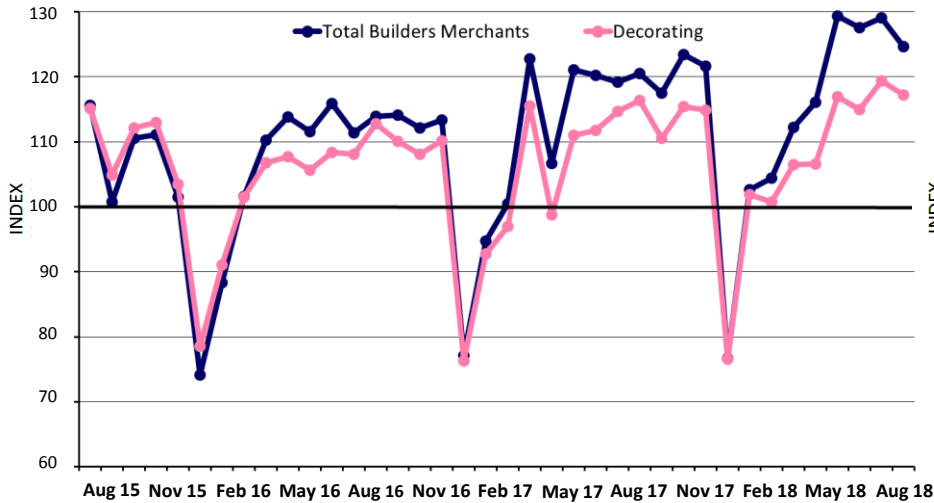
Indexed on July 2014 – June 2015

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

# Monthly: Indices

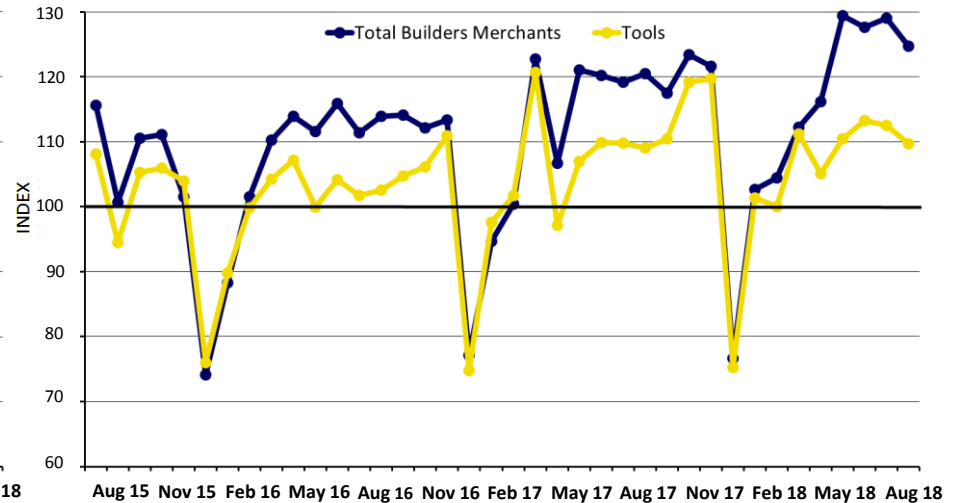
## August 2018

### Decorating



Indexed on July 2014 – June 2015

### Tools



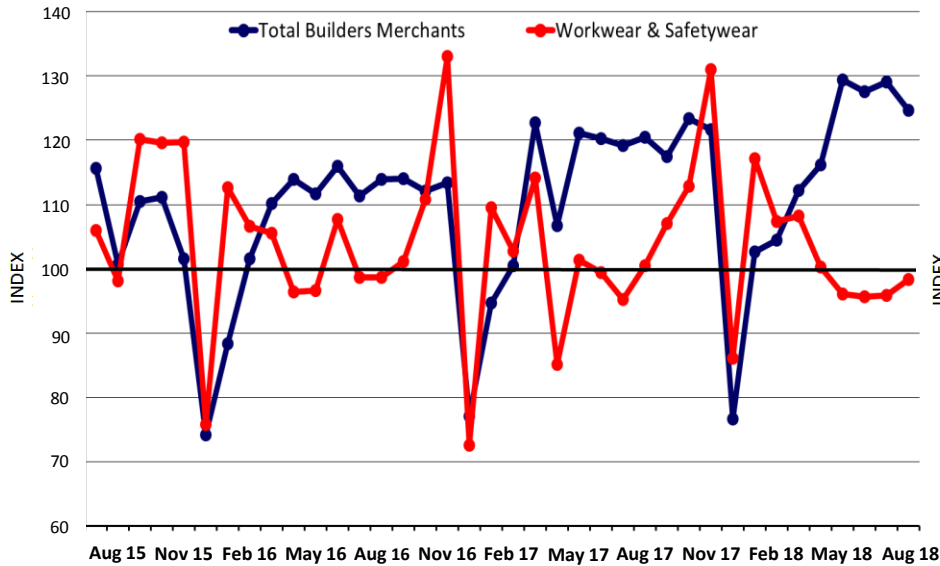
Indexed on July 2014 – June 2015

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

# Monthly: Indices

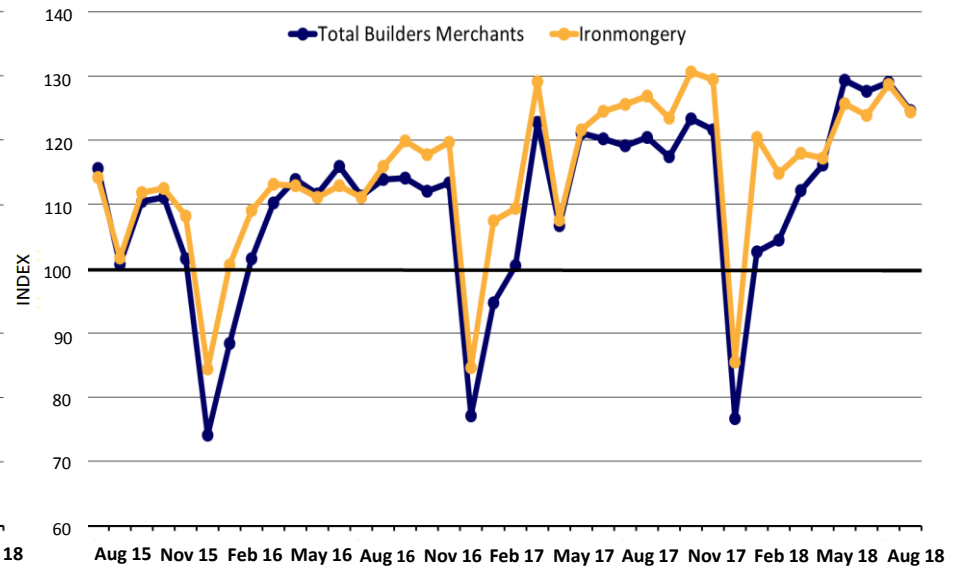
## August 2018

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



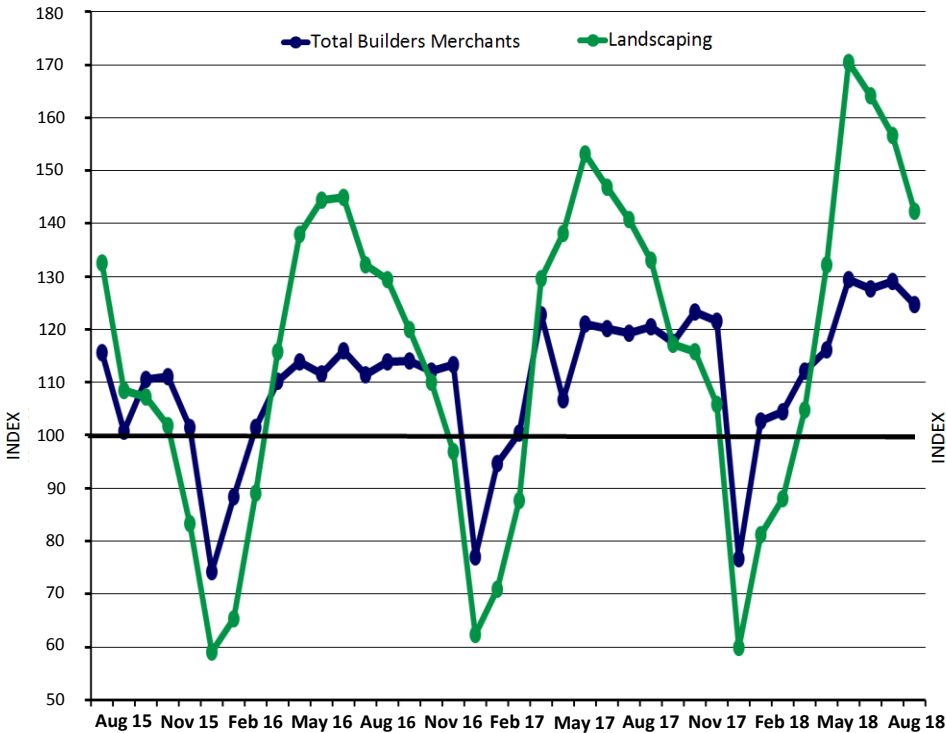
Indexed on July 2014 – June 2015

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

# Monthly: Indices

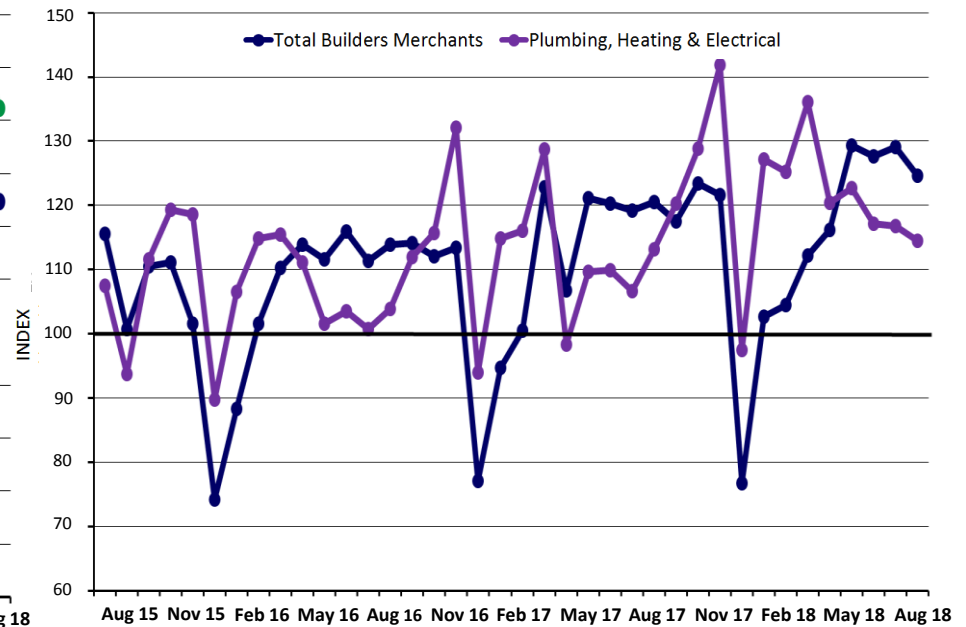
## August 2018

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical



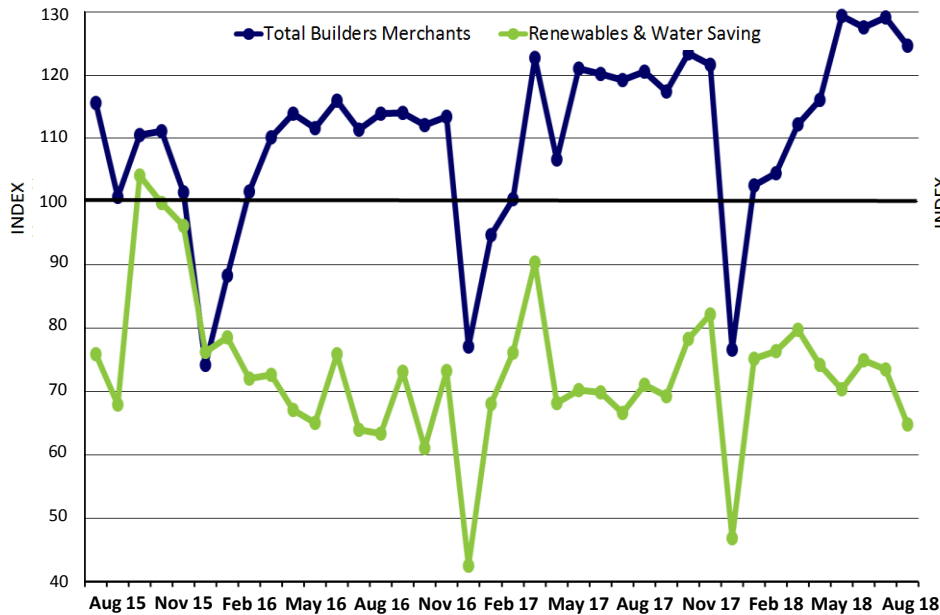
Indexed on July 2014 – June 2015

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

# Monthly: Indices

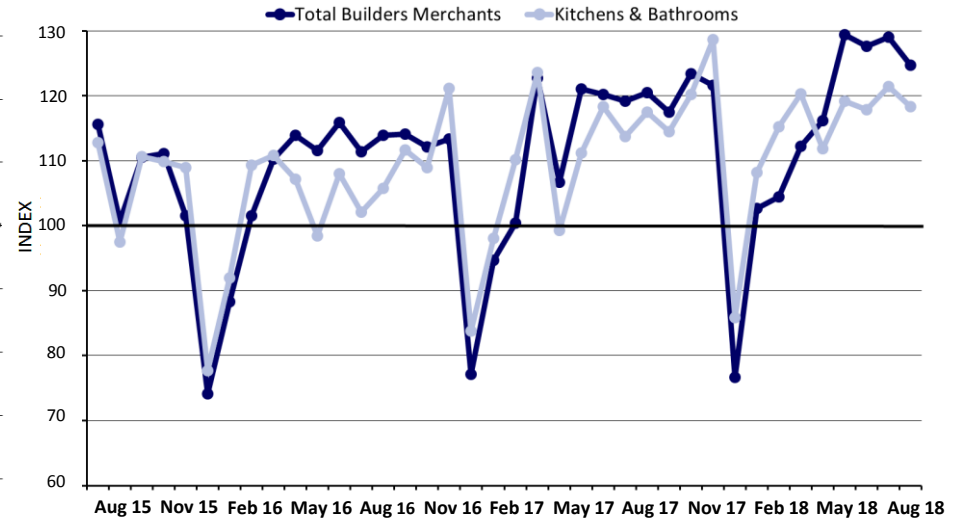
## August 2018

### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms

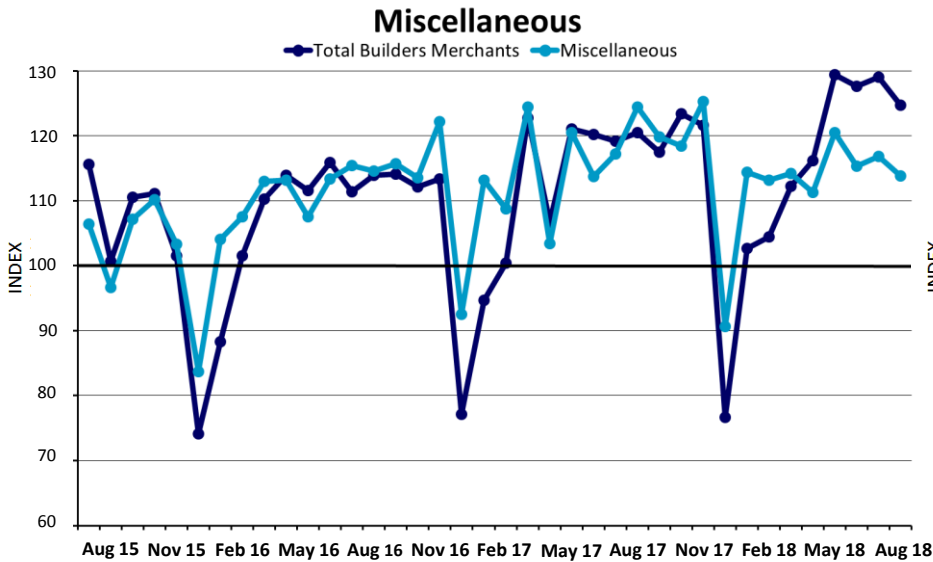


Indexed on July 2014 – June 2015

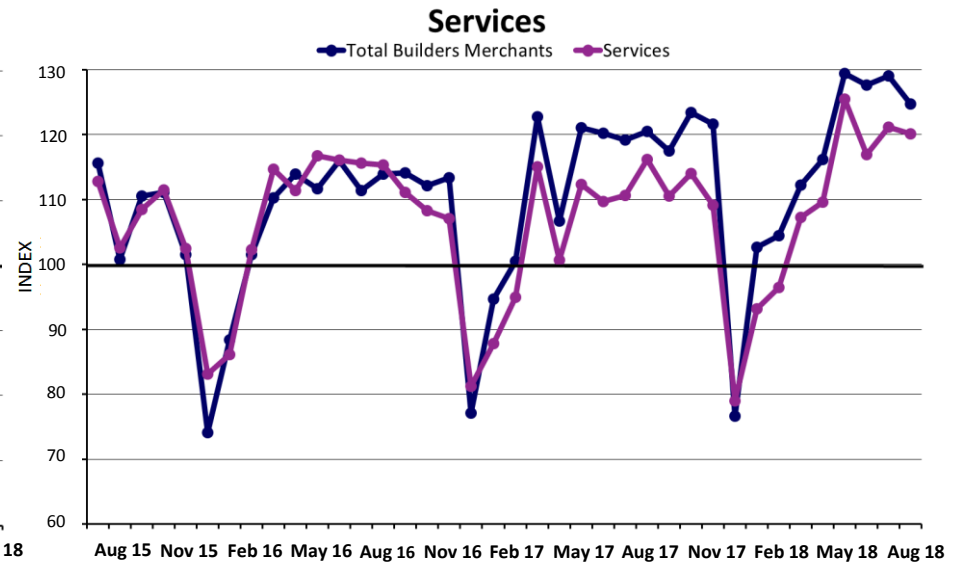
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to August 2018

# Monthly: Indices

## August 2018



Indexed on July 2014 – June 2015



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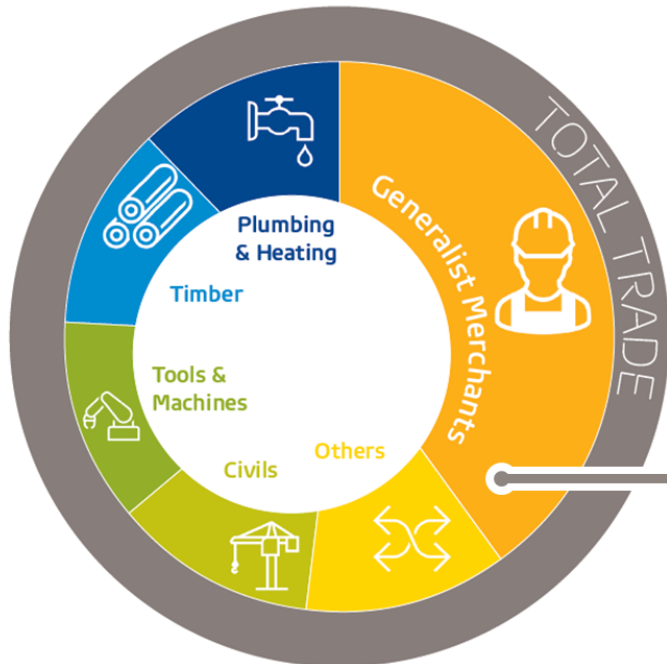
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to August 2018

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

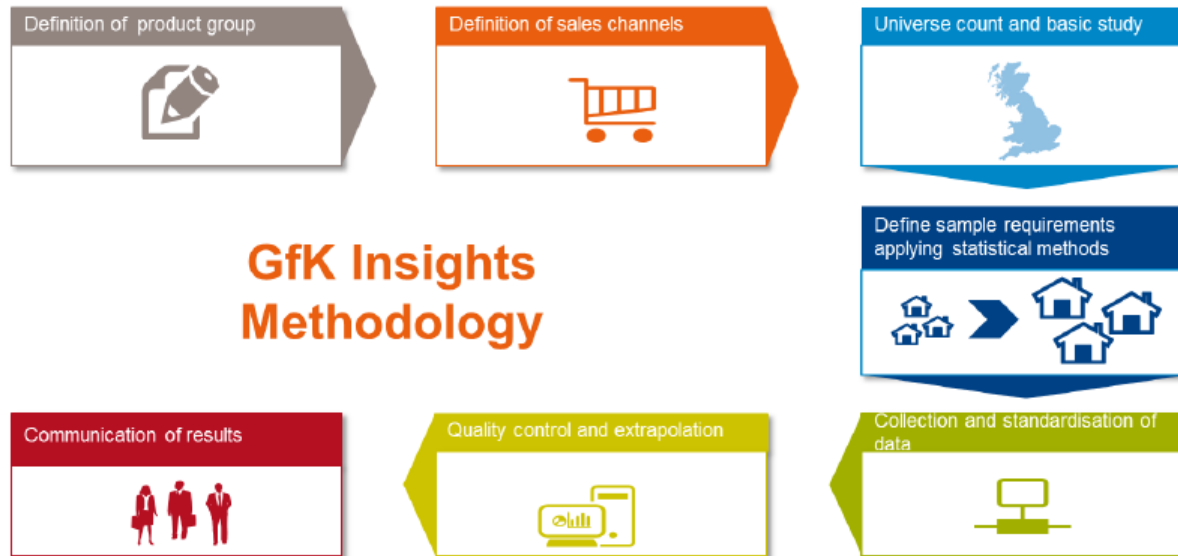
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

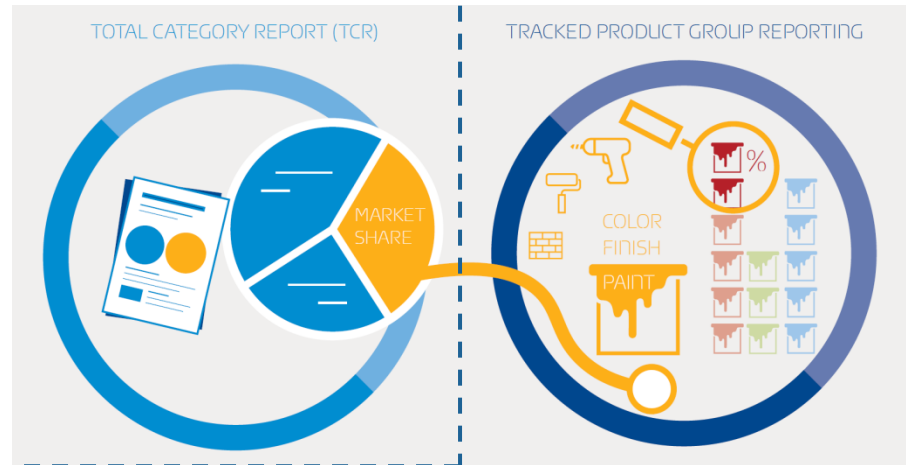
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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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