

# **Builders Merchant Building Index**



**Monthly report for November 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 Q3 report.

The collage features several report covers and charts:

- Monthly and Quarterly Indices:** A line and bar chart comparing September 2018 and Q3 2018 for Timber & Joinery Products. It shows a general upward trend in sales over the period.
- Macro factors impacting Merchants:** A GfK report cover with a table of property transactions (monthly, residential, seasonally adjusted) from 2010 to 2017. The table shows a steady increase in transactions over the period.
- GfK's Product Categories:** A report cover titled 'Cover category headline values & in-depth, level insights'. It includes a pie chart and various data points for different product categories.
- Expert Panel Roof Windows:** A report cover featuring John Duffin, Managing Director of Keylite Roof Windows. It includes a line chart of property transactions from 1977 to 2017 and a quote about the growth of white PVC products.

# 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

## Weaker November propped up by robust Timber & Joinery Products sales

### Year on year

Total Builders Merchant value sales were up 0.8% in November compared with November 2017. Four categories did better, including Timber & Joinery Products (+3.9%), the second-largest category. Plumbing Heating & Electrical (+3.3%) had its highest monthly sales since BMBI started in July 2014.

Seven categories sold less this year, but three had falls of less than 1%: Ironmongery (-0.1%), Kitchens & Bathrooms (-0.4%) which, despite the decline, had its best monthly sales in 2018, and largest category Heavy Building Materials (-0.8%).

### Month on month

Overall November sales were 7.0% lower than October. The last three years have seen sales drop between October and November but the reduction was higher this year. However October 2018 had the highest value sales since BMBI started and this will have contributed to the larger month-on-month fall. Workwear & Safetywear (+4.9%) was one of only three categories that sold more, along with Kitchens & Bathrooms (+4.6%) and Plumbing Heating & Electrical (+3.9%). Seasonal category Landscaping (-15.7%) was weakest.

### Other periods

The eleven months January to November 2018 were 4.0% ahead of the same period in 2017. Plumbing Heating & Electrical was strongest (+7.7%) with Timber & Joinery Products (+7.2%) close behind.

The rolling 12 months December 2017 to November 2018 were 3.7% above the same 12 months a year earlier, with one less trading day. Plumbing Heating & Electrical (+7.5%) was strongest. Average sales a day in the period were 4.2% higher.

### Index

November's BMBI index was 122.5 with one additional trading day. Plumbing Heating & Electrical was top (146.5). The average sales a day index for November was 115.6.

Plumbing Heating & Electrical (+3.3%) had its highest monthly sales since BMBI started in July 2014.

# 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 Q3 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: Q3 2018 Report](#)

**Expert for Civils, Metal Rainwater & Drainage**  
(New Expert to be announced)  
Alumasc Water Management Systems



[Read latest Comment: Q3 2018 Report](#)



**John Duffin**  
Managing Director  
Keylite Roof Windows



**Expert for Roof Windows**

[Read latest Comment: Q3 2018 Report](#)



**Andrew Simpson**  
National Commercial Director  
Hanson Cement



**Expert for Cement & Aggregates**

[Read latest Comment: Q3 2018 Report](#)



**Nigel Cox**  
Managing Director  
Timbmet



**Expert for Timber & Panel Products**

[Read latest Comment: Q3 2018 Report](#)



**Paul Owen**  
Commercial Director Distribution  
IKO PLC



**Expert for Roofing Products**

[Read latest Comment: Q3 2018 Report](#)

# The Expert Panel

## Speaking for their markets - 2



**Derrick McFarland**  
Managing Director  
Keystone Lintels

**Expert for Steel Lintels**



[Read latest Comment: Q3 2018 Report](#)



**Tony France**  
Sales Director  
Ibstock

**Expert for Bricks**



[Read latest Comment: Q3 2018 Report](#)



**John Sinfield**  
Managing Director  
Knauf Insulation

**Expert for Mineral Wool Insulation**



[Read latest Comment: Q3 2018 Report](#)



**Paul Rivett**  
Managing Director  
Heatrae Sadia

**Expert for Water Heating**



[Read latest Comment: Q3 2018 Report](#)



**Mike Beard**  
Merchant Development  
Director  
Encon Insulation

**Expert for Insulation Products -  
Distribution**



[Read latest Comment: Q3 2018 Report](#)



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

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



[Read latest Comment: Q3 2018 Report](#)



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

**Expert for Paint**



[Read latest Comment: Q3 2018 Report](#)



**Mike Tattam**  
Sales & Marketing Director  
Lakes

**Expert for Shower Enclosures and  
Showering**



[Read latest Comment: Q3 2018 Report](#)



# Monthly: Index and Categories

## November 2017\* – November 2018

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



MONTHLY SALES VALUE INDEX	Index	2017		2018										
		Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov
<b>Total Builders Merchants</b>	<b>100</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>	<b>118.4</b>	<b>131.8</b>	<b>122.5</b>
Timber & Joinery Products	100	122.1	77.8	108.0	107.6	112.9	115.9	126.7	126.2	131.1	129.3	124.7	137.2	126.8
Heavy Building Materials	100	122.8	75.2	100.5	103.3	110.8	115.9	128.7	128.0	128.8	123.9	117.8	132.4	121.8
Decorating	100	114.9	76.6	101.9	100.8	106.5	106.6	117.0	114.9	119.4	117.2	112.0	124.6	116.1
Tools	100	119.8	75.3	101.3	100.0	111.2	105.1	110.5	113.3	112.5	109.7	108.0	123.2	117.8
Workwear & Safetywear	100	131.0	86.1	117.2	107.3	108.3	100.2	96.0	95.7	95.9	98.3	107.5	123.5	129.5
Ironmongery	100	129.5	85.5	120.4	114.8	118.0	117.3	125.7	123.9	128.8	124.4	117.9	133.6	129.3
Landscaping	100	105.8	60.0	81.3	88.0	104.8	132.1	170.4	164.1	156.6	142.4	122.8	126.0	106.1
Plumbing, Heating & Electrical	100	141.9	97.4	127.2	125.2	136.1	120.4	122.7	117.1	116.8	114.5	120.4	141.1	146.5
Renewables & Water Saving	100	82.2	46.8	75.2	76.3	79.8	74.2	70.4	75.0	73.5	64.8	67.8	76.4	68.5
Kitchens & Bathrooms	100	128.6	85.9	108.2	115.2	120.3	111.9	119.2	117.8	121.4	118.4	113.0	122.5	128.2
Miscellaneous	100	125.3	90.7	114.4	113.2	114.2	111.3	120.5	115.3	116.8	113.9	106.6	126.3	119.1
Services	100	109.2	79.0	93.1	96.4	107.3	109.6	125.4	116.9	121.1	120.1	106.9	125.1	114.2

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

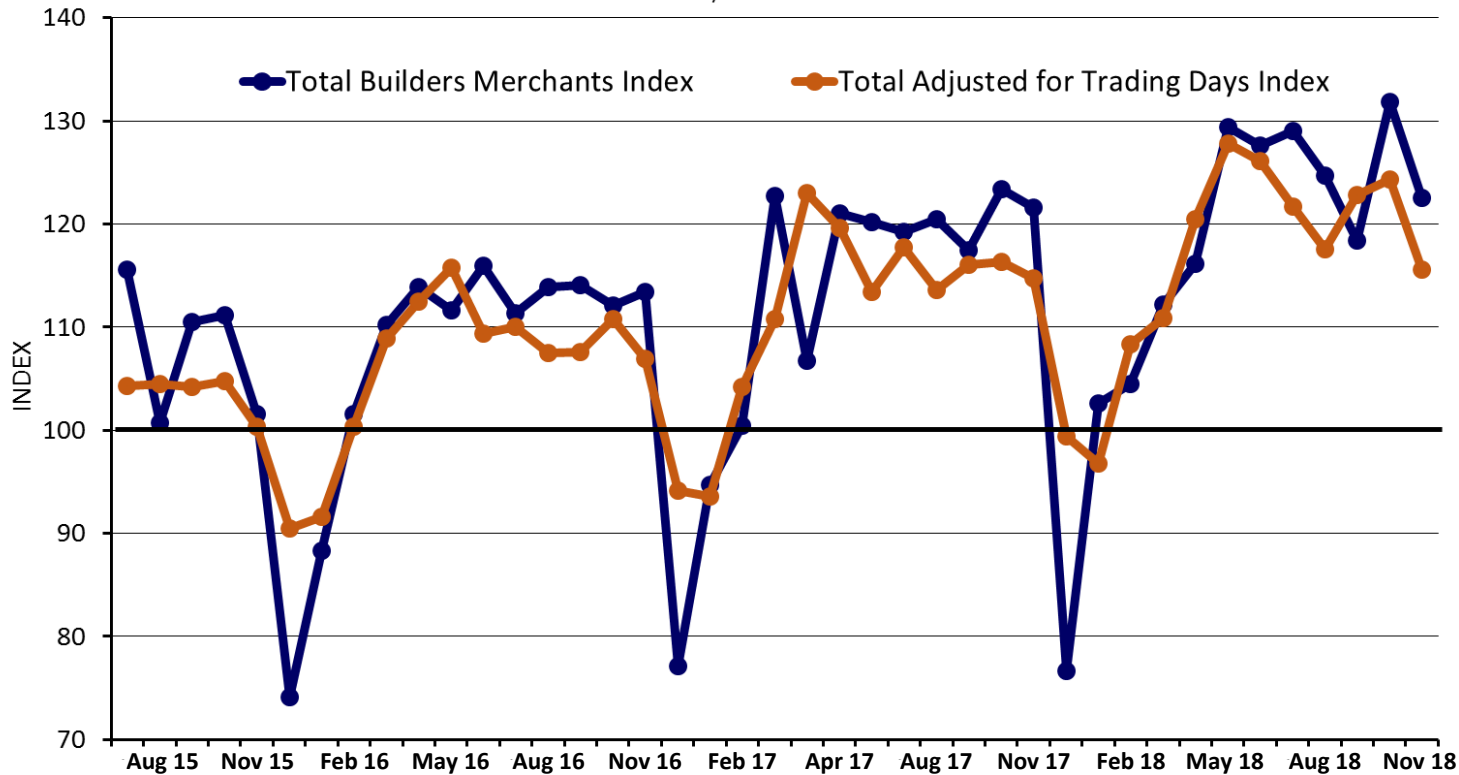
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# 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 Months: 20.8 23 20 22 22 21 17 20 21 21 21 20 22 21 22 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 22

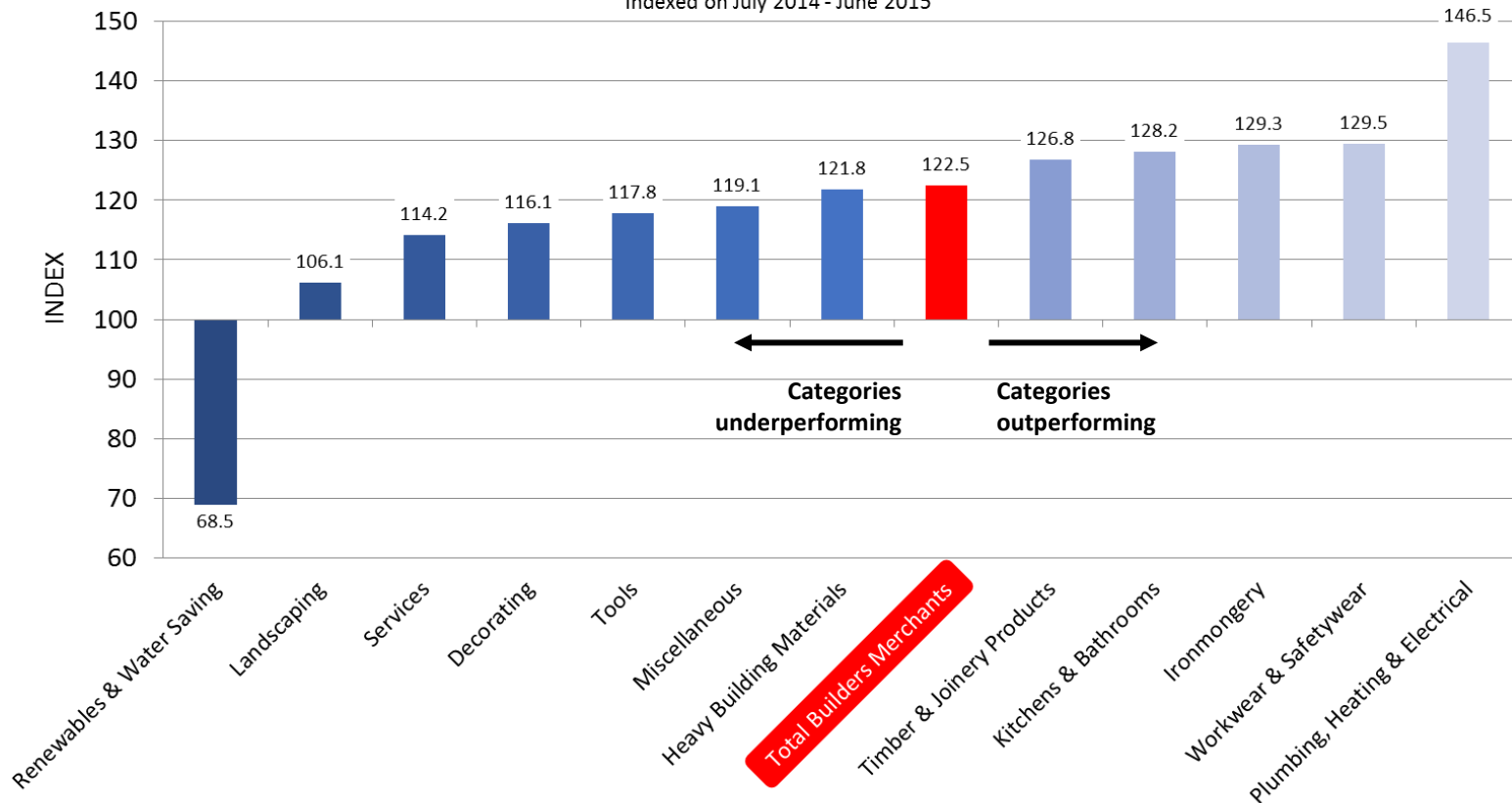
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# Monthly: Index and Categories

## November 2018 index

### November 2018

Indexed on July 2014 - June 2015

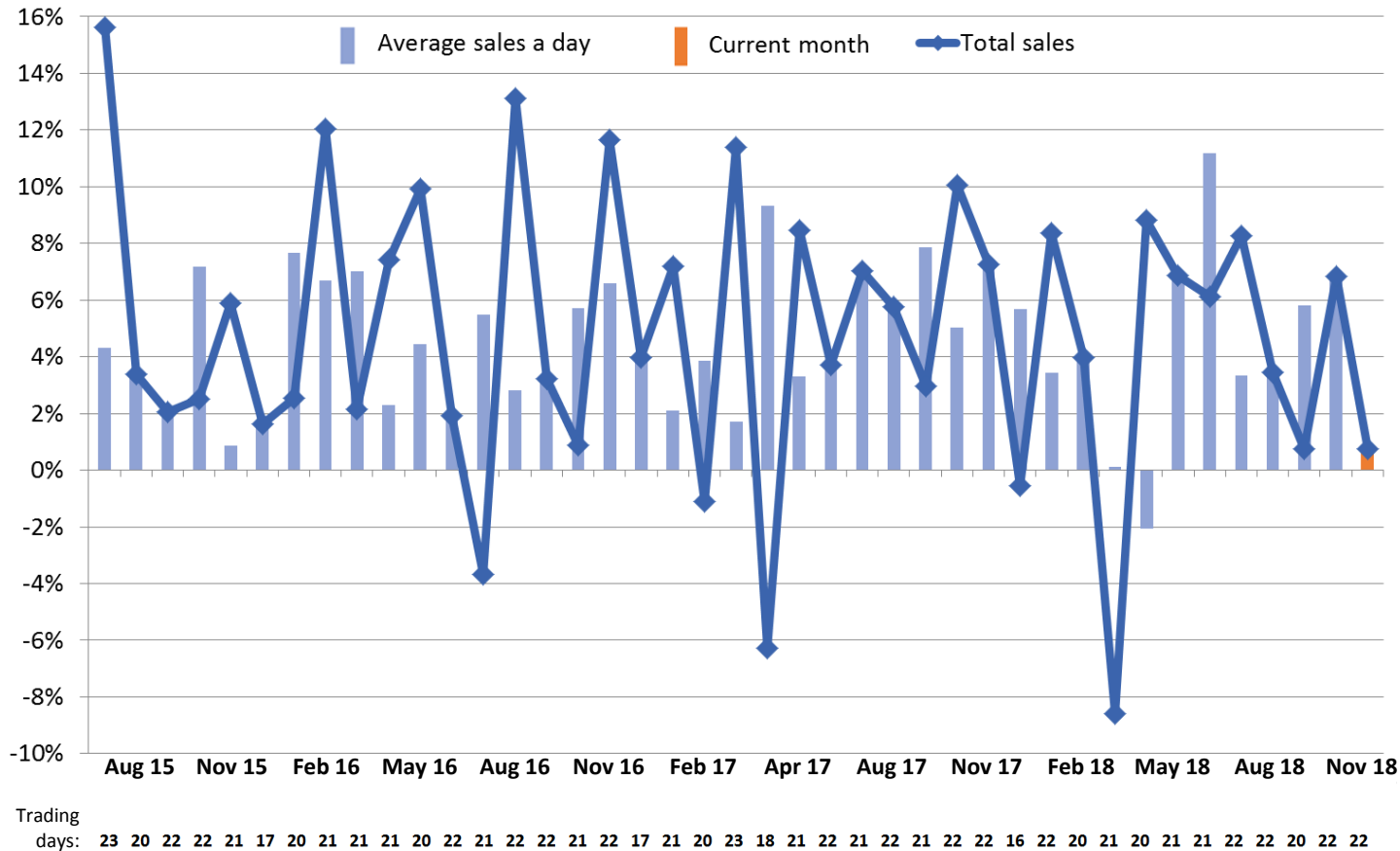


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year

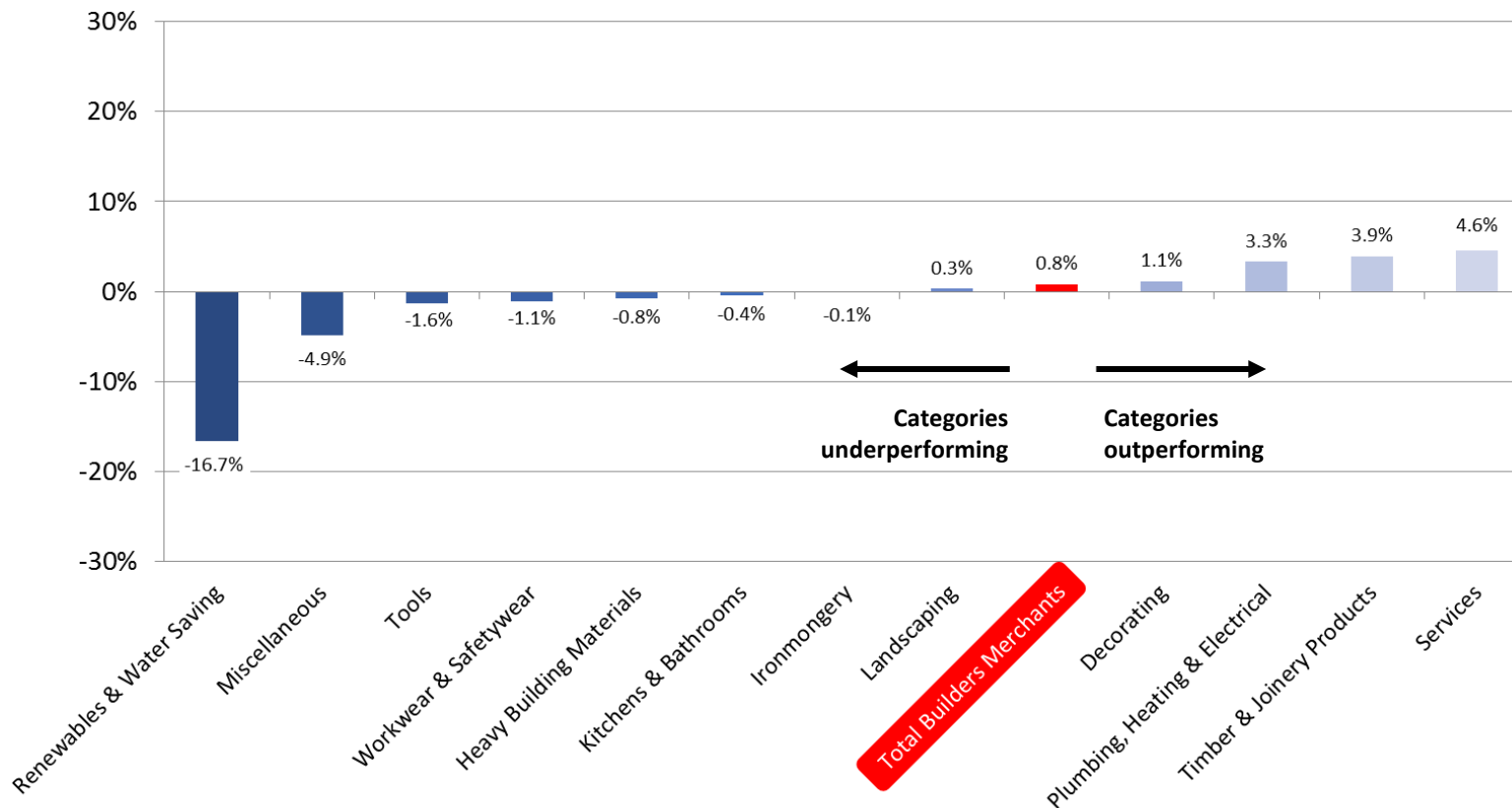


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# Monthly: This Year v Last Year

## November 2018 sales indices

### November 2018 index v November 2017 index



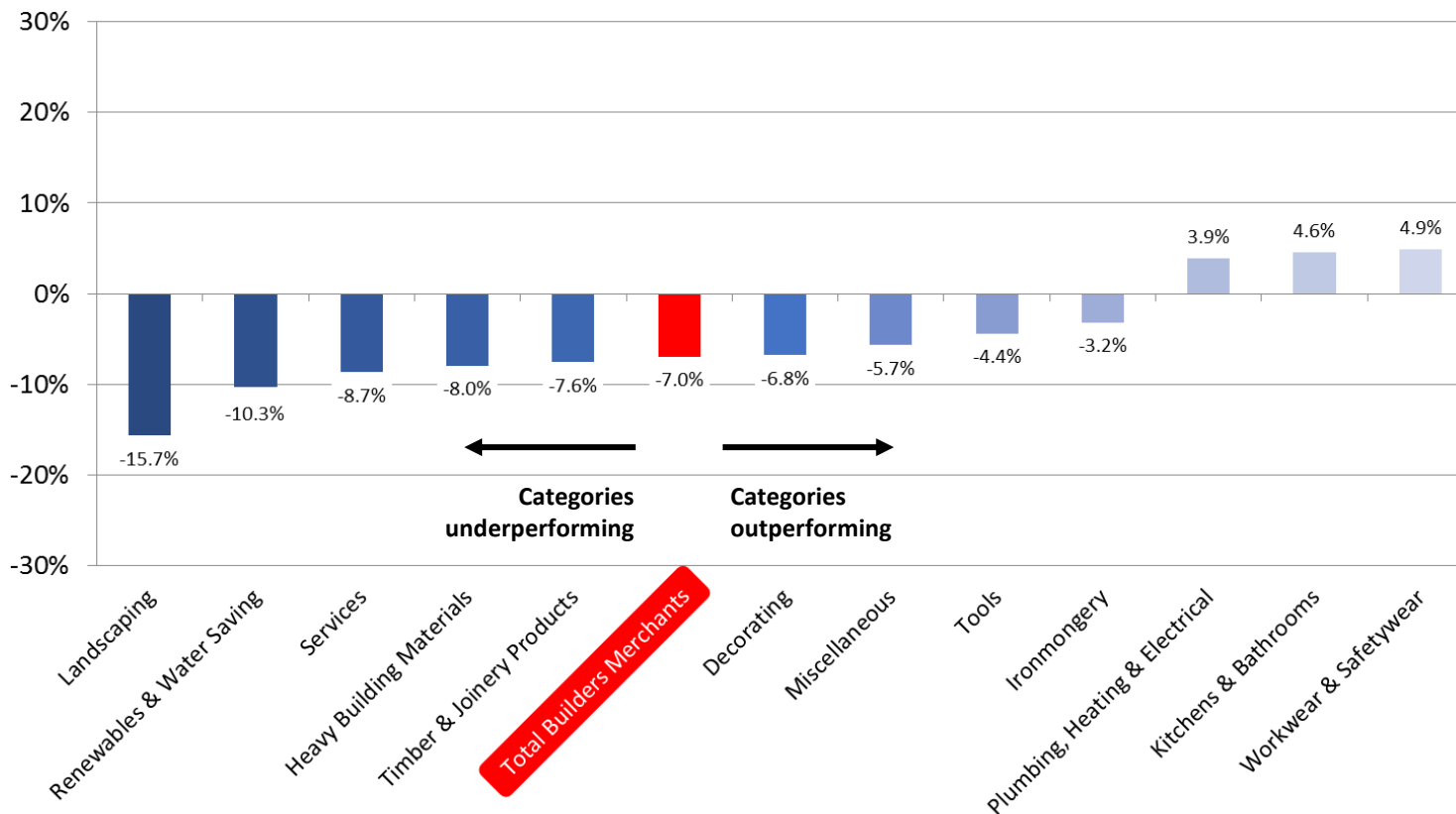
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# Monthly: This Month v Last Month

## November 2018 sales indices



### November 2018 index v October 2018 index



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

# Quarterly: Index and Categories

## Quarter 3 2017\* to Quarter 3 2018

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q3 2017	Q4 2017	Q1 2018	Q2 2018	Q3 2018
<b>Total Builders Merchants</b>	<b>100</b>	<b>119.1</b>	<b>107.2</b>	<b>106.4</b>	<b>124.4</b>	<b>124.0</b>
Timber & Joinery Products	100	117.1	108.1	109.5	122.9	128.3
Heavy Building Materials	100	120.7	107.9	104.9	124.2	123.5
Decorating	100	113.9	102.3	103.0	112.8	116.2
Tools	100	109.8	104.7	104.2	109.6	110.1
Workwear & Safetywear	100	100.9	110.0	110.9	97.3	100.6
Ironmongery	100	125.3	115.2	117.8	122.3	123.7
Landscaping	100	130.4	93.8	91.4	155.5	140.6
Plumbing, Heating & Electrical	100	113.4	122.7	129.5	120.1	117.2
Renewables & Water Saving	100	69.0	69.1	77.1	73.2	68.7
Kitchens & Bathrooms	100	115.2	111.6	114.6	116.3	117.6
Miscellaneous	100	120.5	111.4	113.9	115.7	112.4
Services	100	112.4	100.7	98.9	117.3	116.1

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

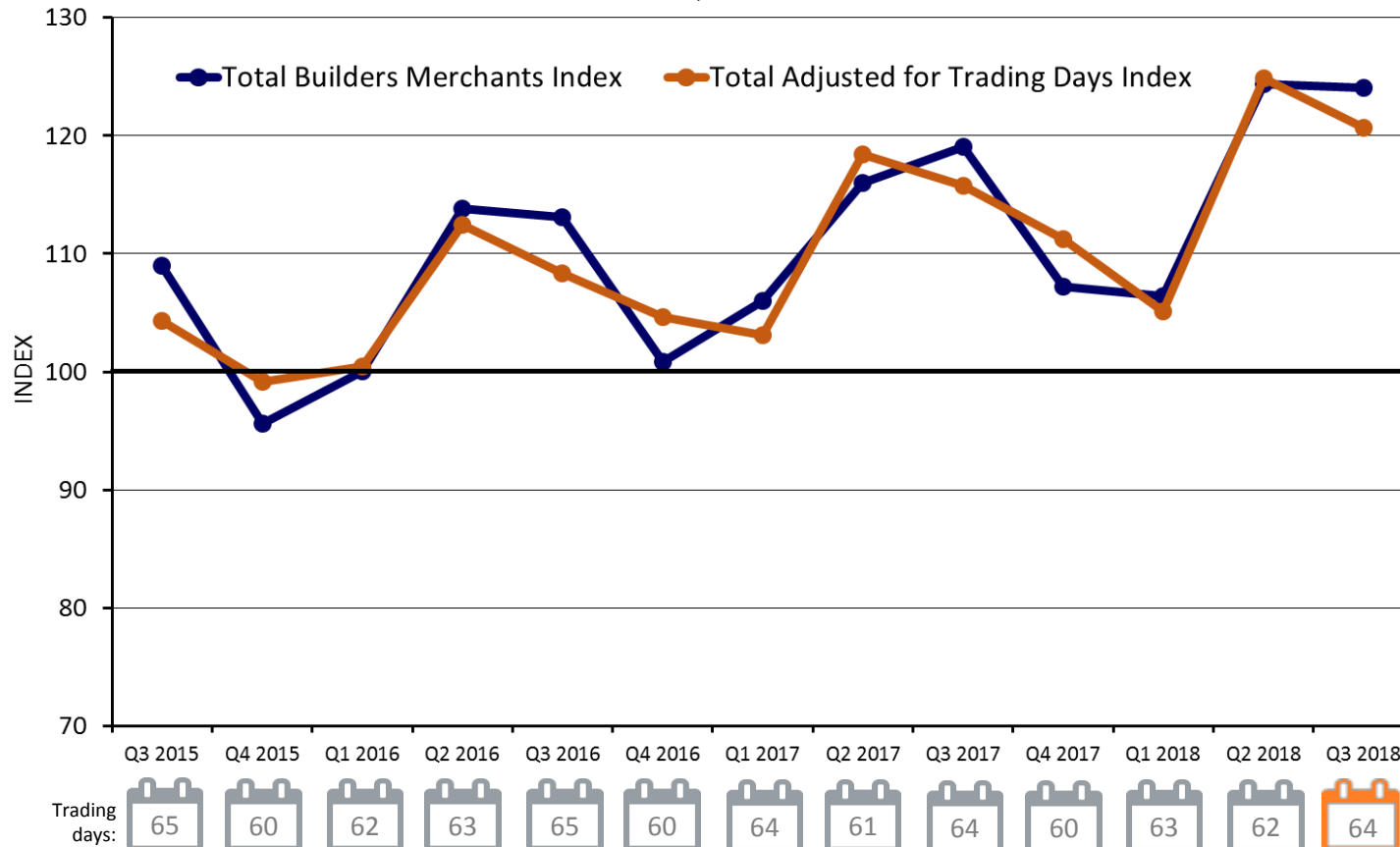
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2018

# 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 September 2018

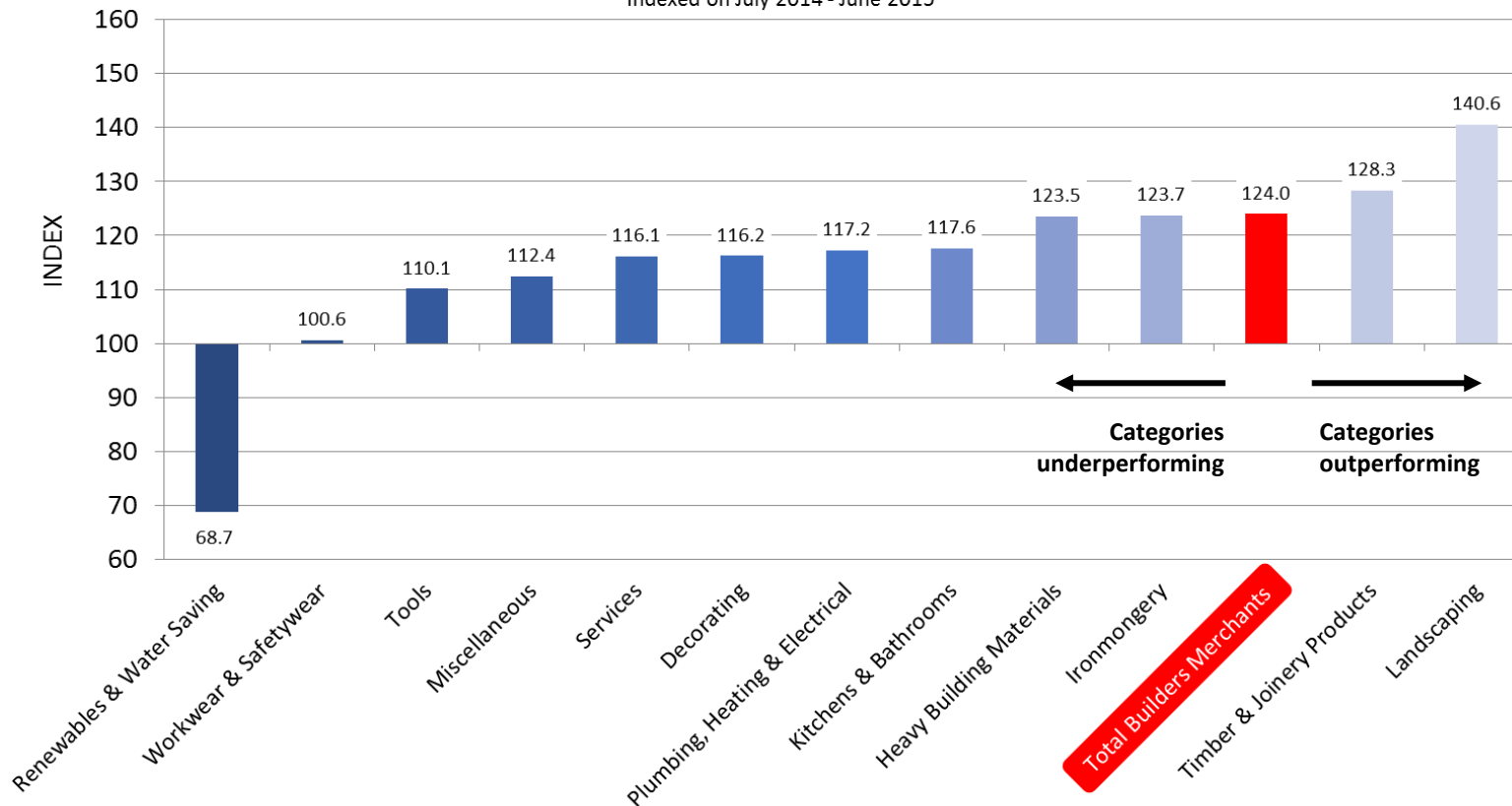


# Quarterly: Index and Categories

## Q3 2018 index

### Quarter 3 2018

Indexed on July 2014 - June 2015



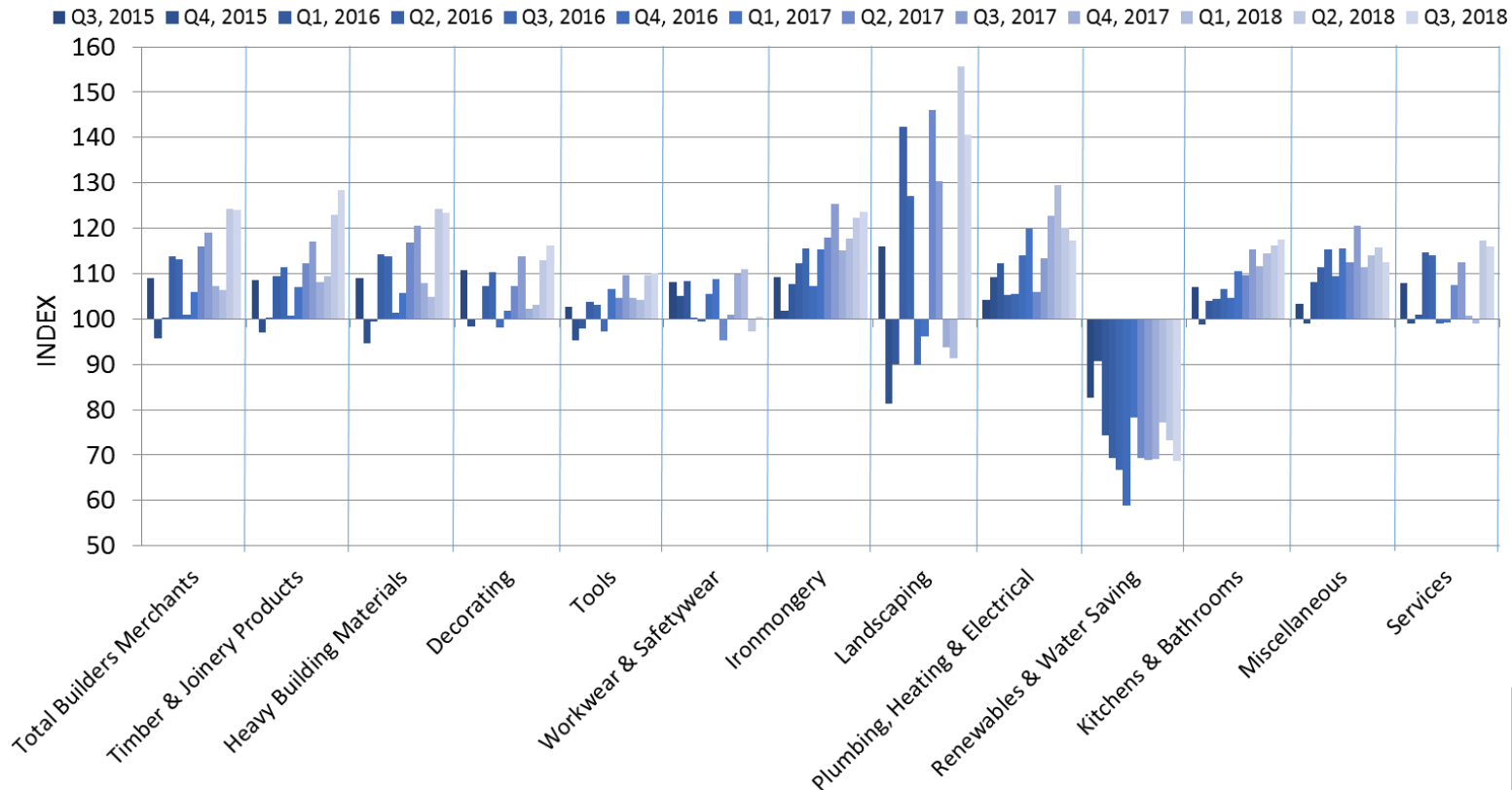
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2018

# Quarterly: Index and Categories

## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

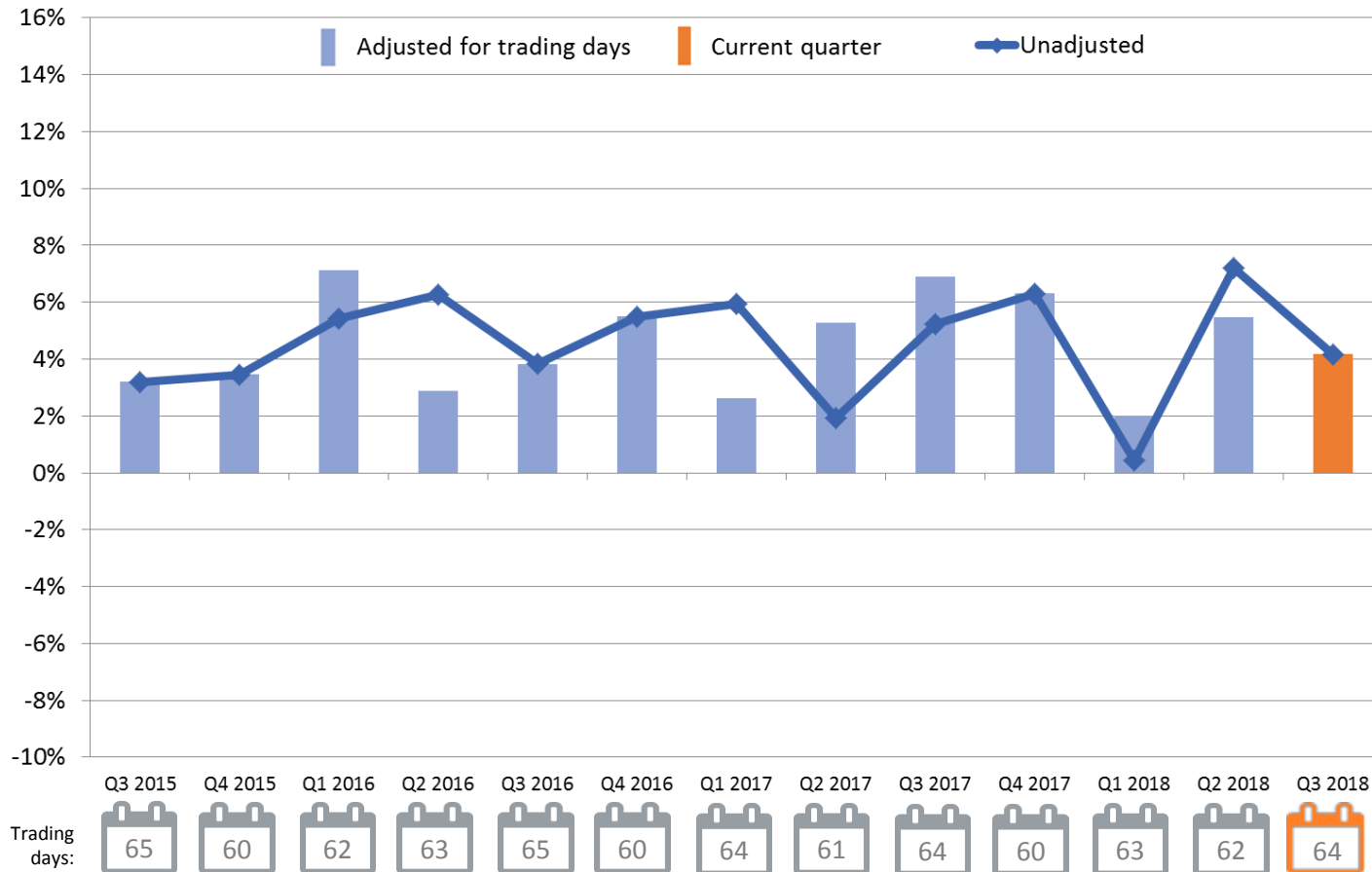


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2018

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

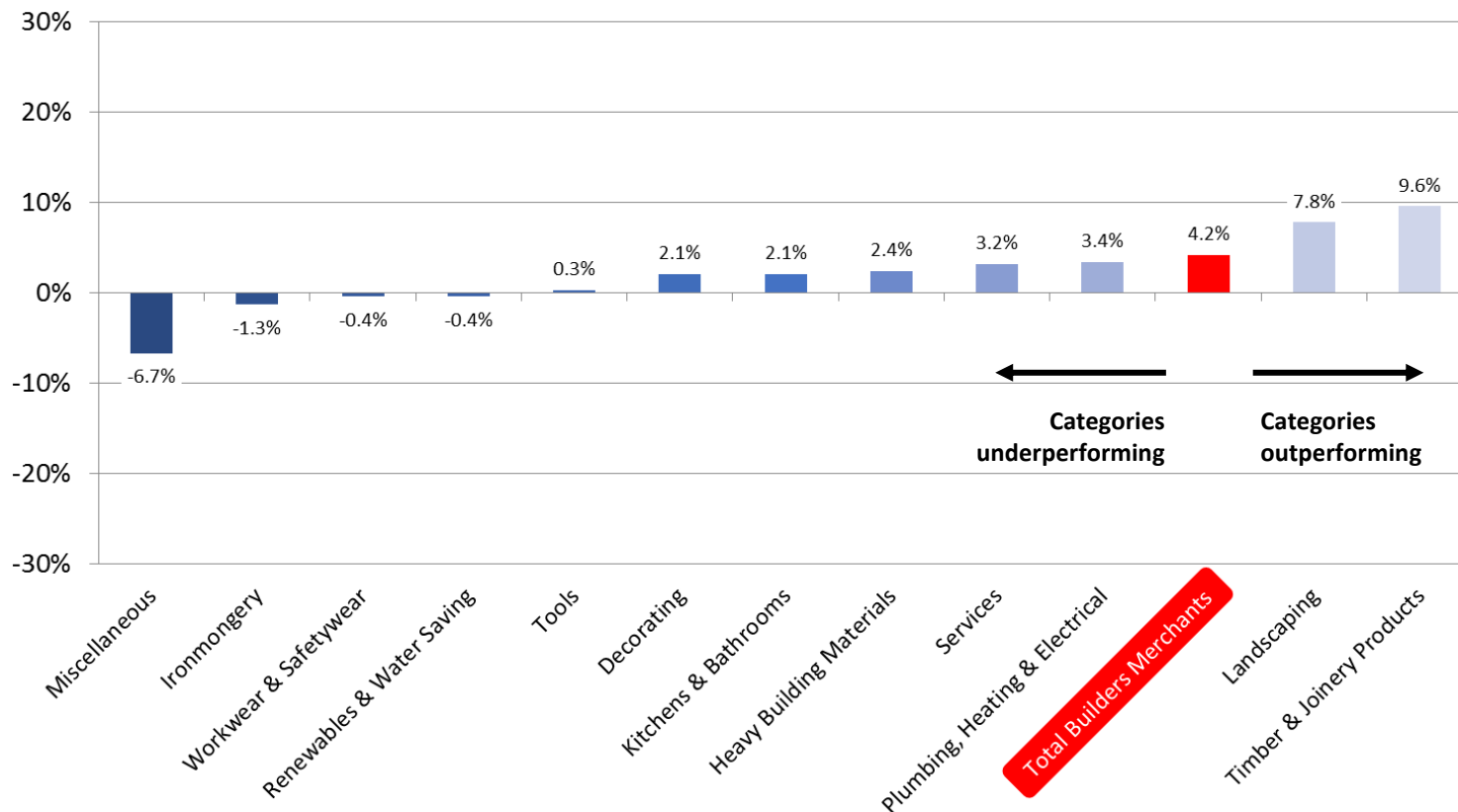


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2018

# Quarterly: This Year v Last Year

## Q3 2018 sales indices

### Quarter 3 2018 index v Quarter 3 2017 index

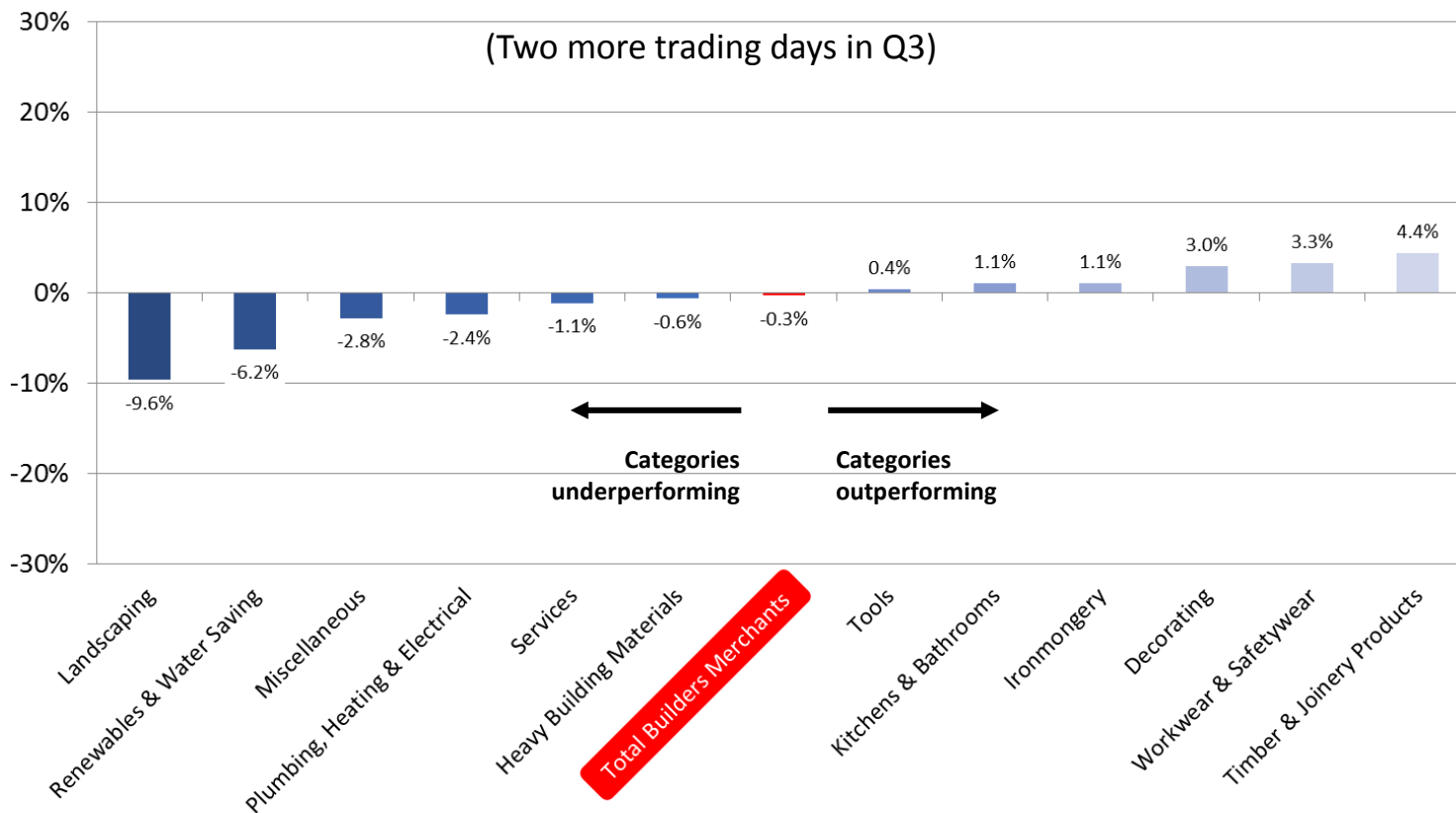


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2018

# Quarterly: Quarter on Quarter

## Q3 2018 sales indices

### Quarter 3 2018 index v Quarter 2 2018 index

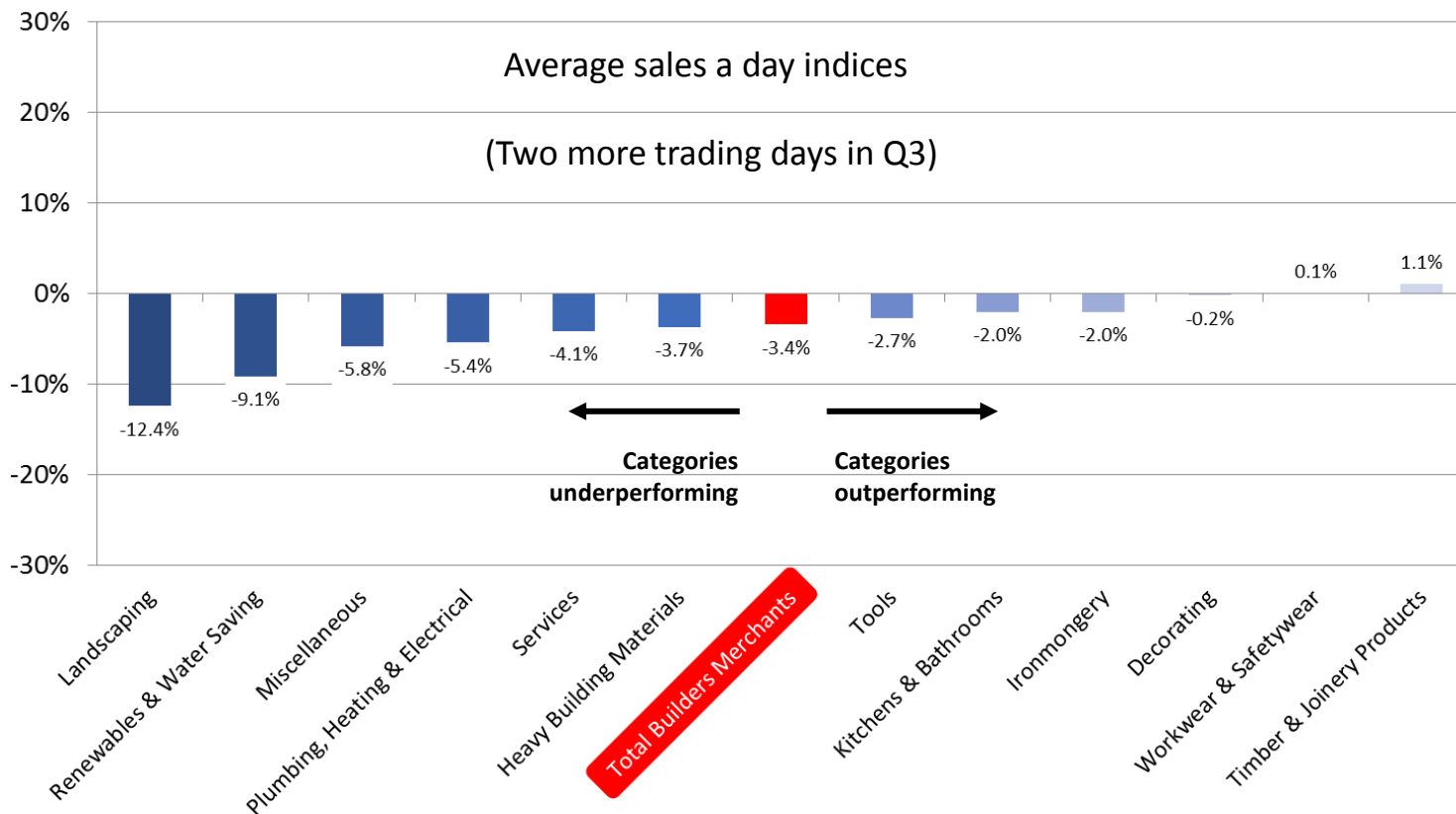


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2018

# Quarterly: Quarter on Quarter

## Q3 2018 average sales a day indices

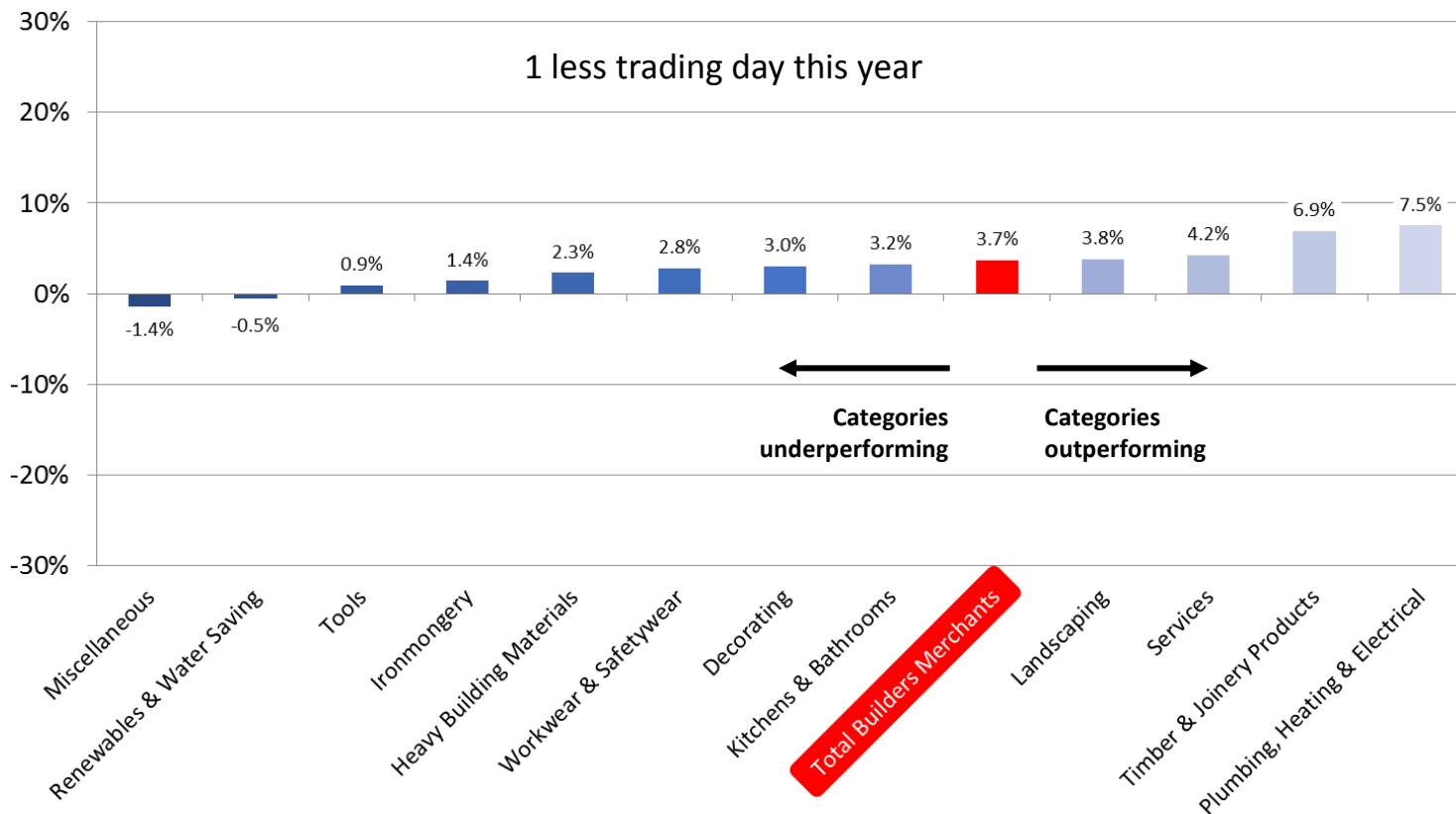
### Quarter 3 2018 Index v Quarter 2 2018 Index



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

# Last 12 Months: Year on Year

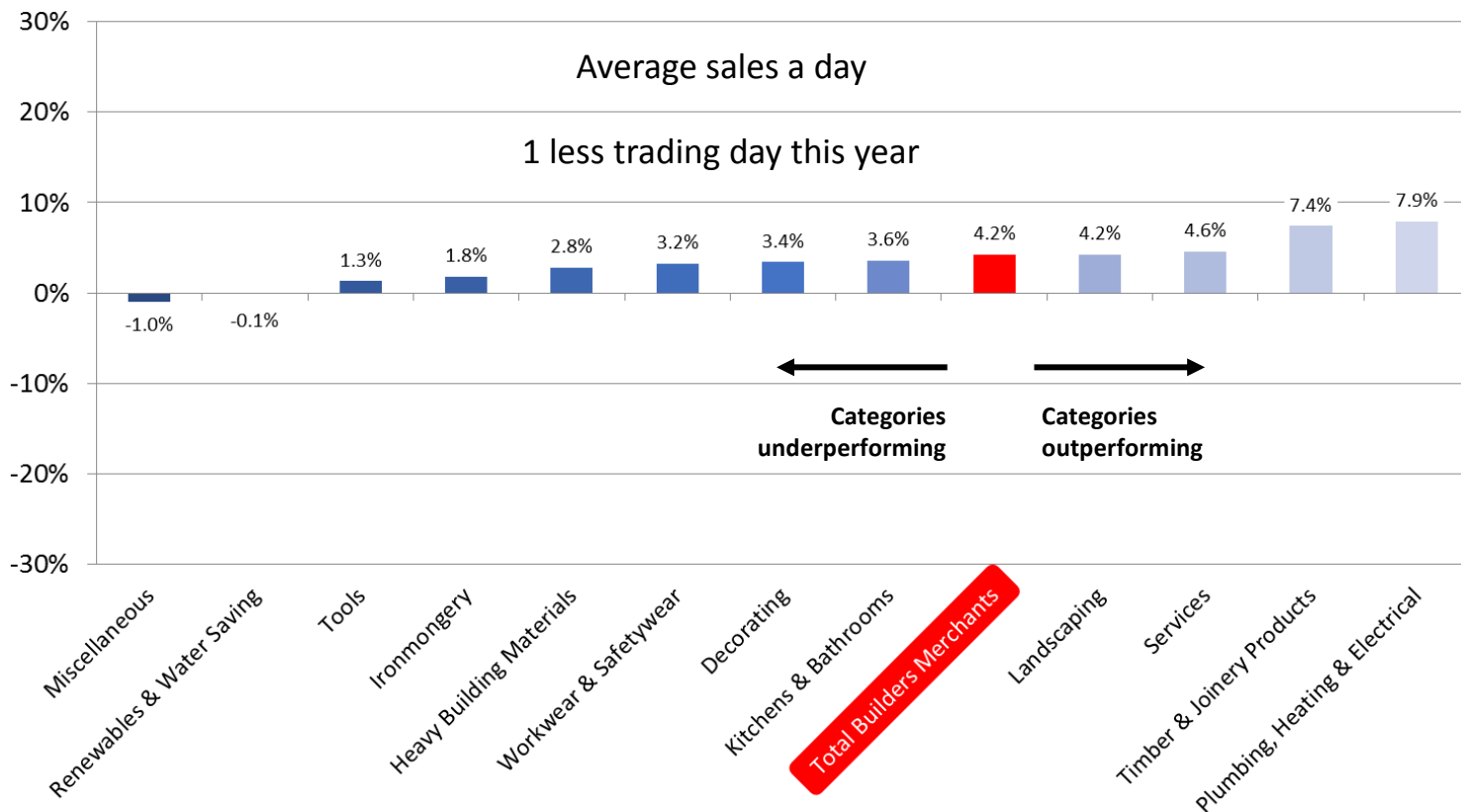
## 12 months Dec 17 to Nov 18 v 12 months Dec 16 to Nov 17



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

# 12 Months: Year on Year Average sales a day indices

## 12 months Dec 17 to Nov 18 v 12 months Dec 16 to Nov 17



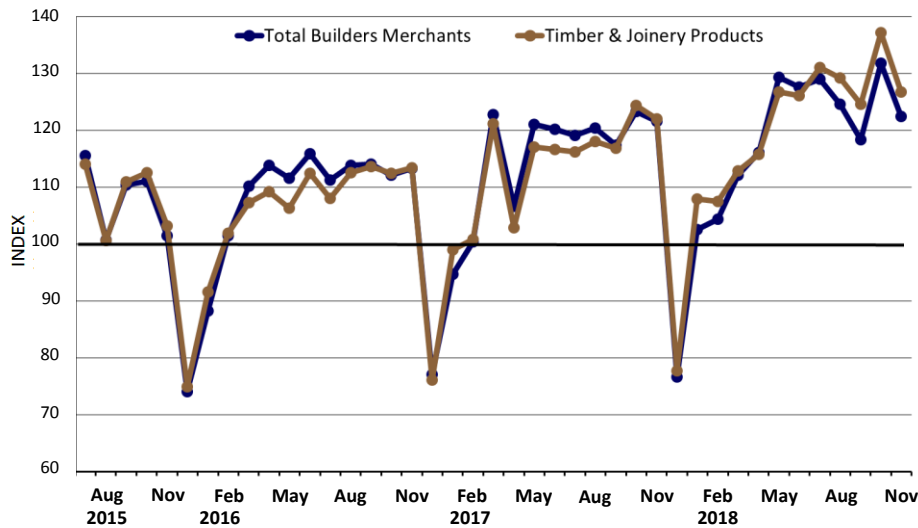
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018



# Monthly: Indices

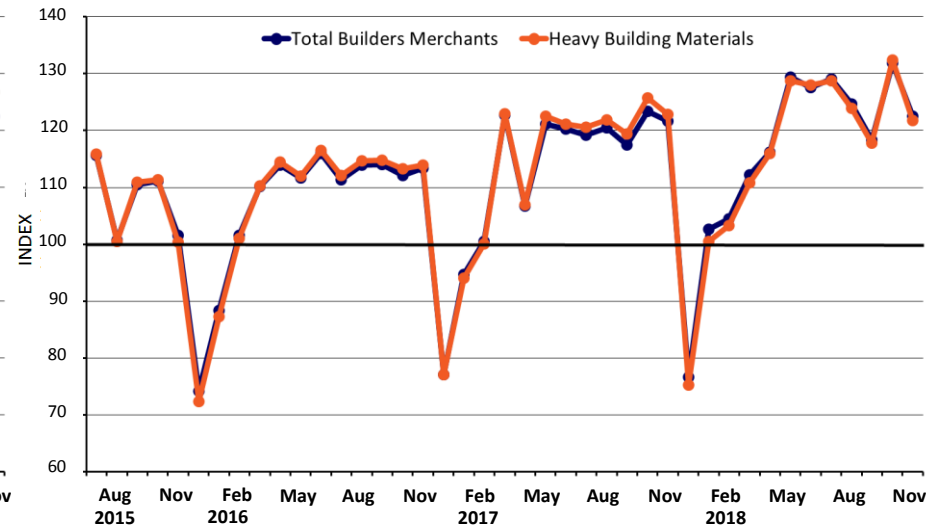
## November 2018

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



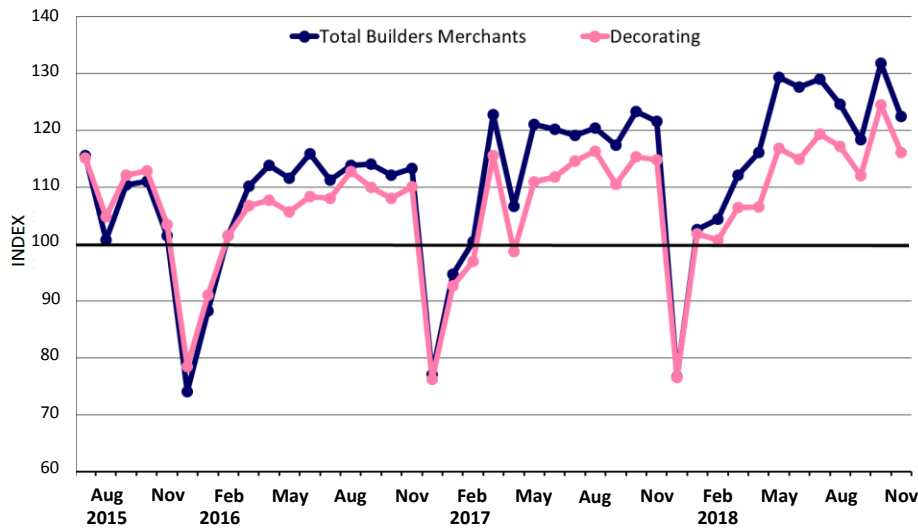
Indexed on July 2014 – June 2015

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

# Monthly: Indices

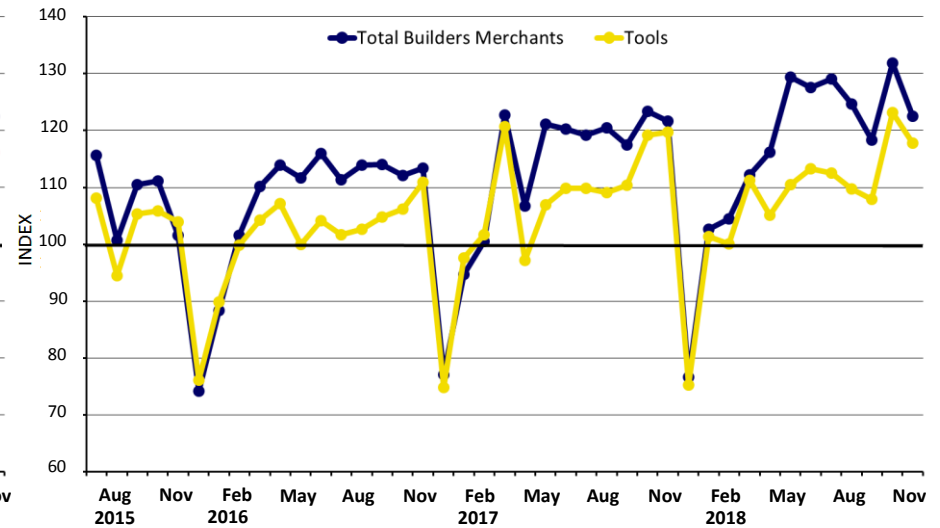
## November 2018

### Decorating



Indexed on July 2014 – June 2015

### Tools

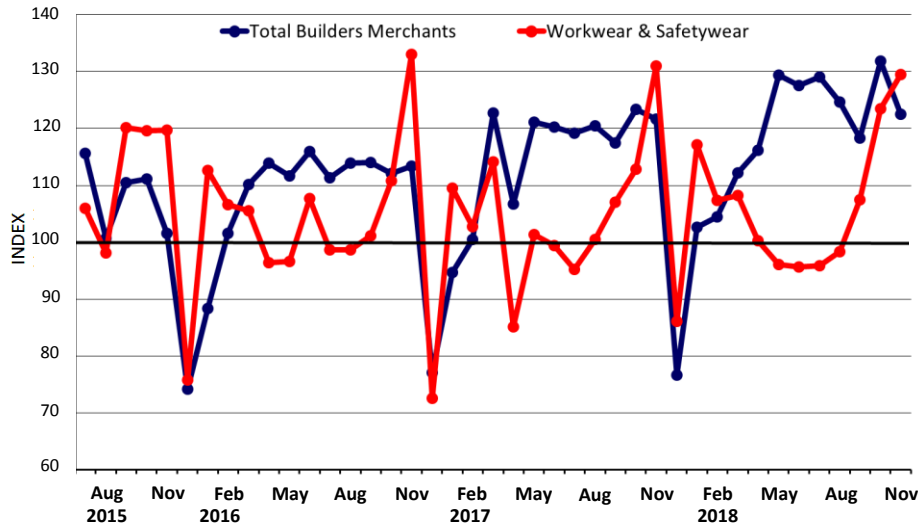


Indexed on July 2014 – June 2015

# Monthly: Indices

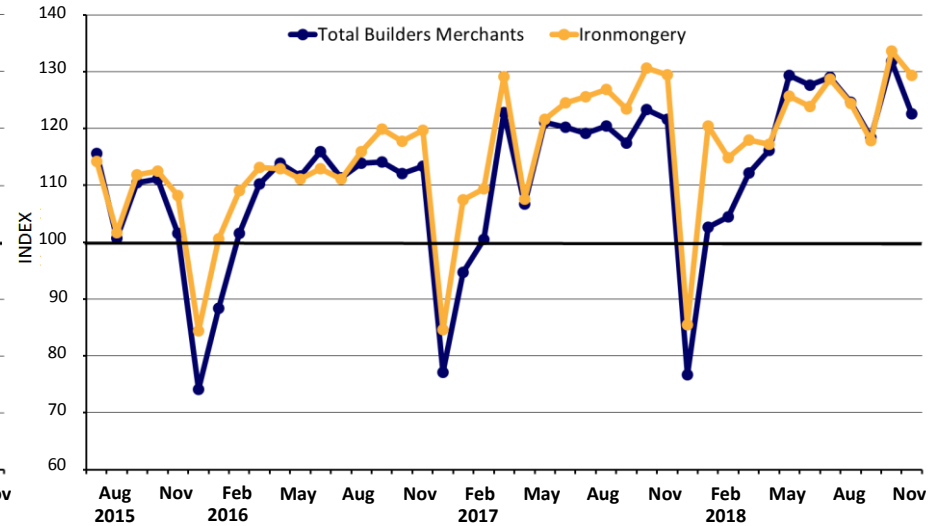
## November 2018

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



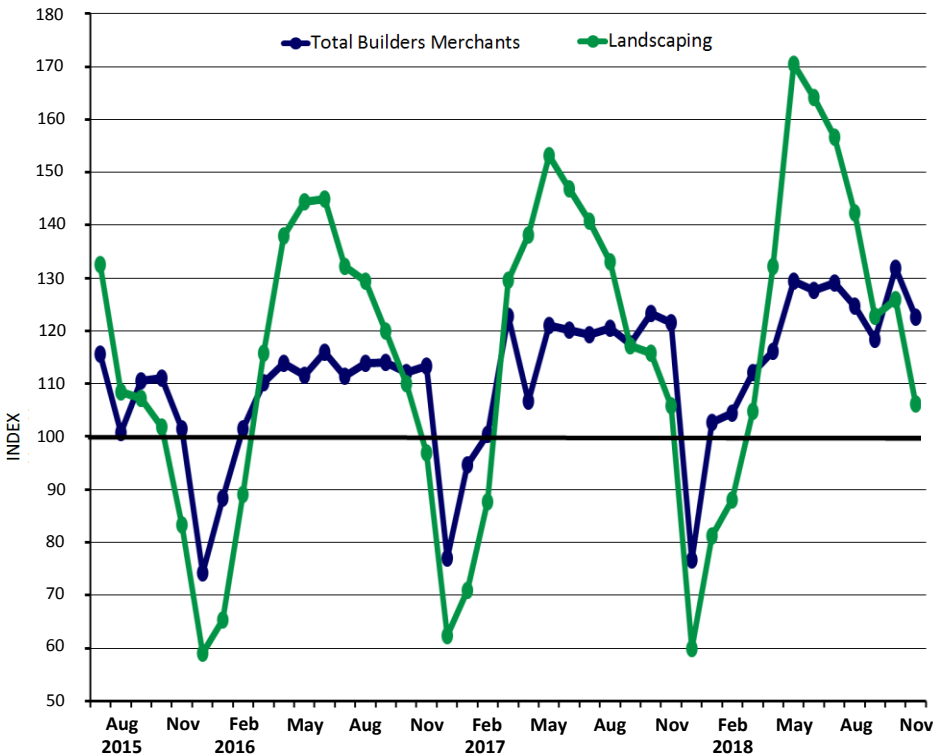
Indexed on July 2014 – June 2015

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

# Monthly: Indices

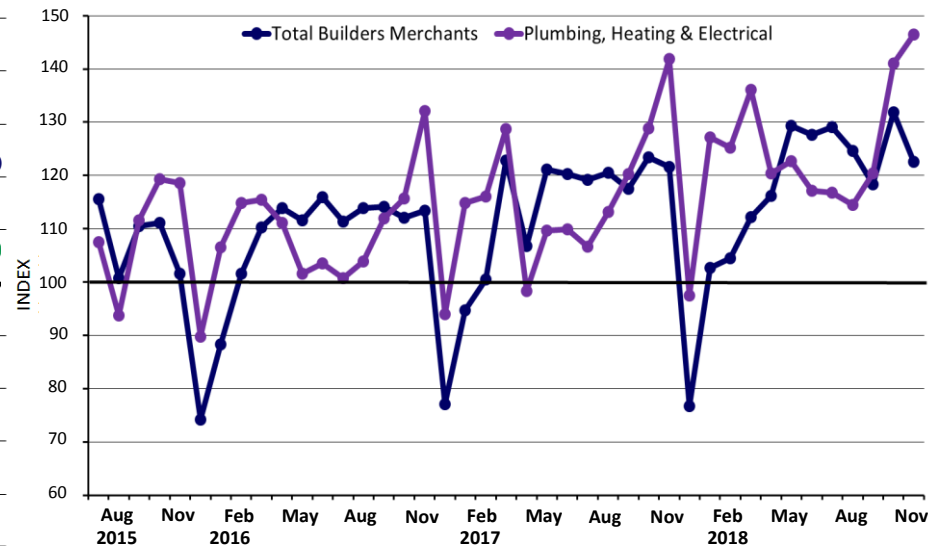
## November 2018

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical

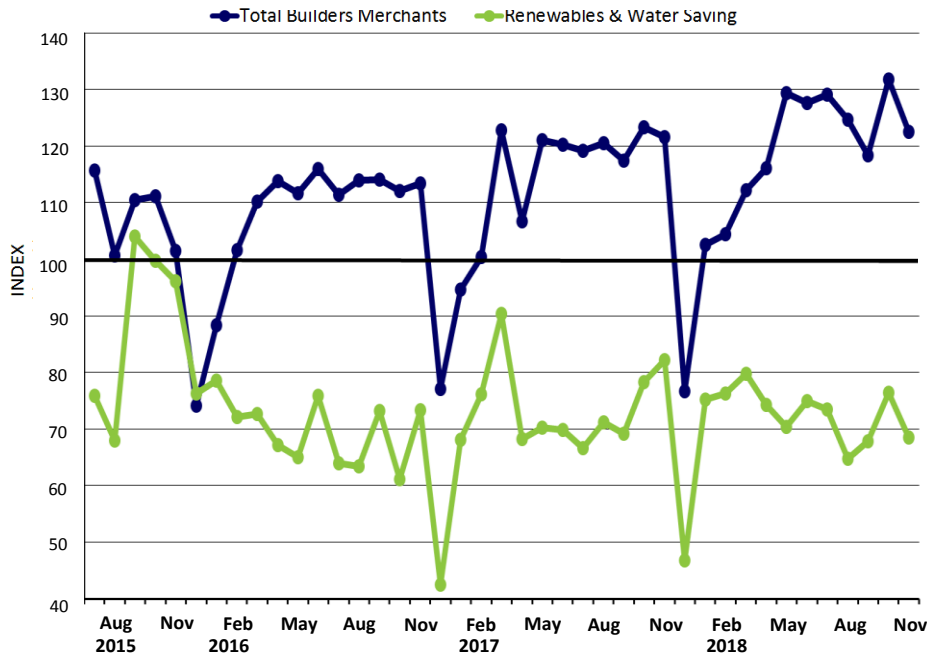


Indexed on July 2014 – June 2015

# Monthly: Indices

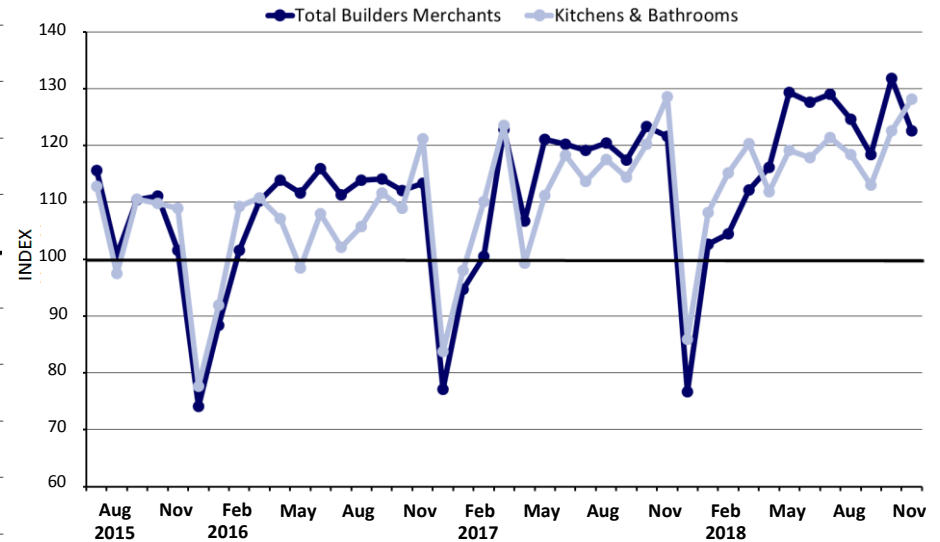
## November 2018

### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms

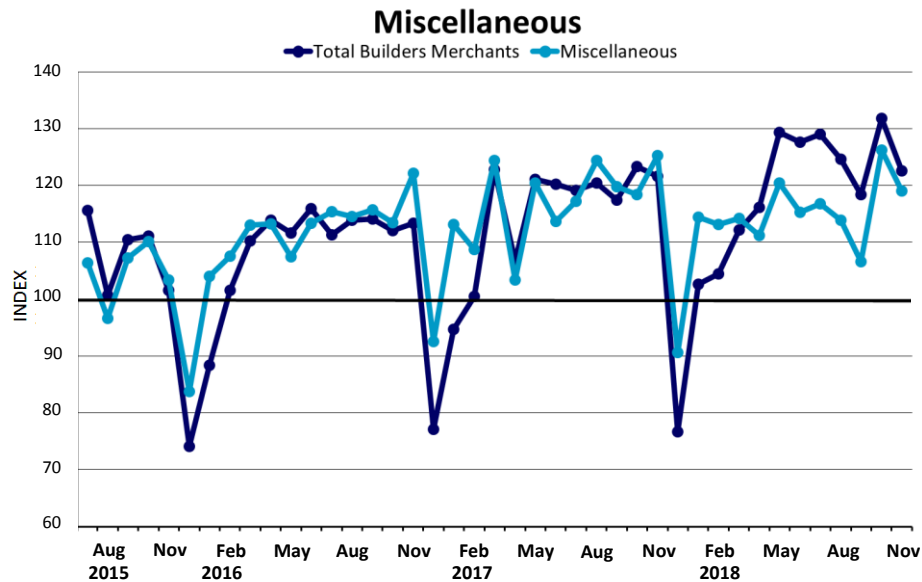


Indexed on July 2014 – June 2015

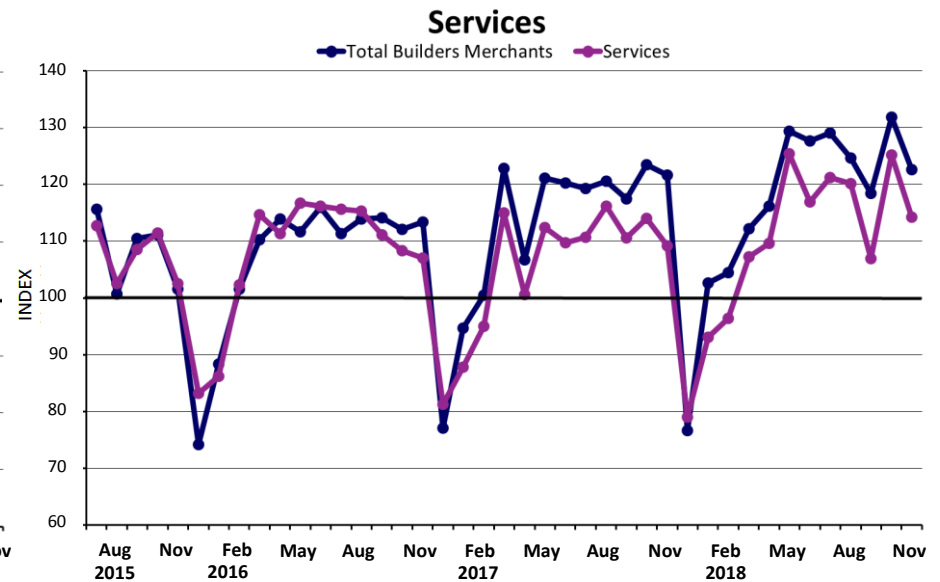
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# Monthly: Indices

## November 2018



Indexed on July 2014 – June 2015



Indexed on July 2014 – June 2015

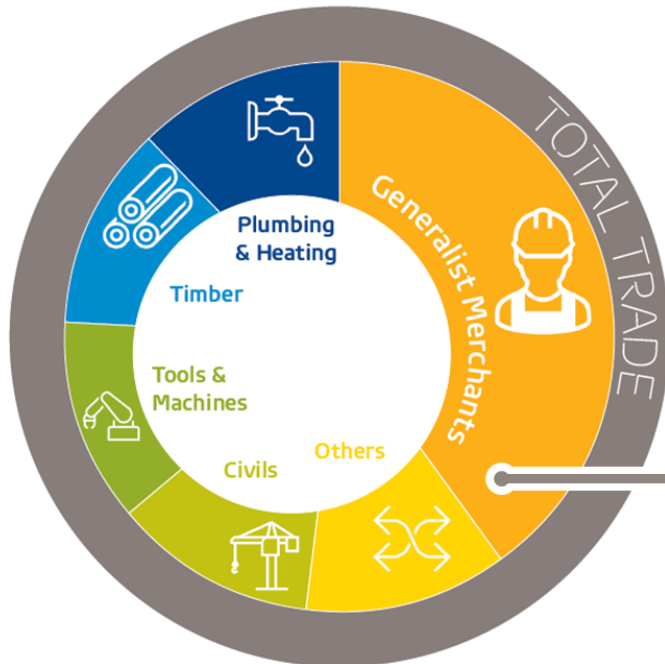
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2018

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

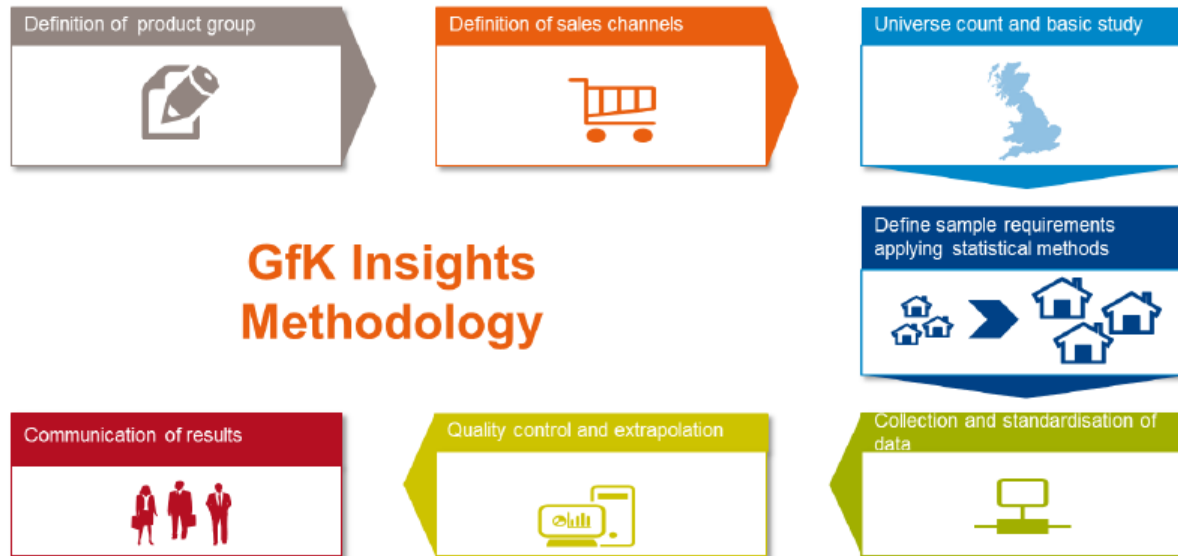
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

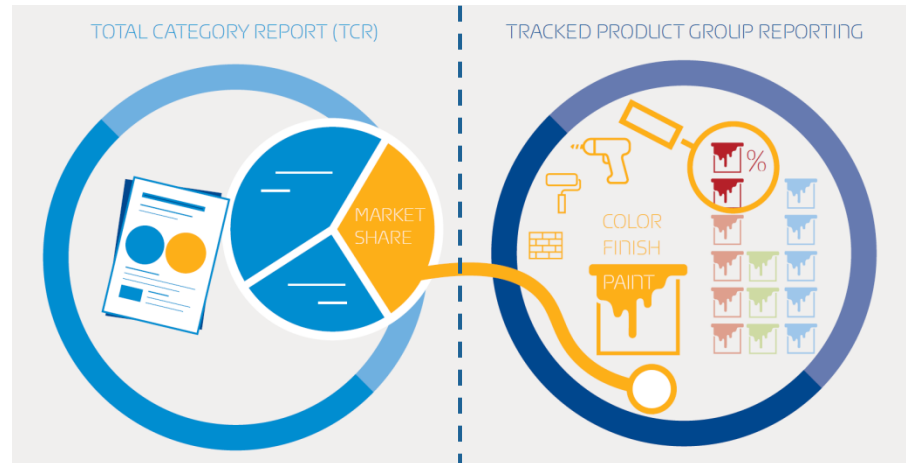
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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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“building excellence  
in materials supply”



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