

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for January 2019

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 Q4 report.

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.

The BMBI website enables you to compare Landscaping trends with Heavy Building Materials, or Kitchens with Timber on our interactive charts.

Download current and past reports, read the news or search through comments or blogs at www.bmbi.co.uk. Follow us and the Experts [@theBMBI](https://twitter.com/theBMBI).

Overview

A positive start to 2019

Year on year

Total Builders Merchant value sales were up 5.0% in January compared with January 2018. Four categories did better, including the two biggest: Timber & Joinery Products (+6.2%) and Heavy Building Materials (+6.1%). Plumbing Heating & Electrical (+2.8%) and Decorating (+2.7%) were among five categories that grew more slowly and Workwear & Safetywear (-4.9%) was one of three that sold less.

Month on month

Comparisons between January 2019 and December 2018 were skewed by January having six more trading days – which resulted in total sales being 39.2% higher. Average sales a day, which takes trading days into account and provides a more meaningful comparison, saw total sales grow by 1.2%. Timber & Joinery (+4.4%), Ironmongery (+4.0%) and largest category Heavy Building Materials (+2.5%) did better, whereas Kitchens & Bathrooms (-1.9%) and Decorating (-3.5%) sold less.

Other periods

Total sales in the three months November 2018 to January 2019 were 2.3% higher than the same period a year earlier. Timber & Joinery Products (+4.4%) was strongest, with Landscaping (+4.1%) close behind. Six categories had lower sales, including Tools (-1.8%) and Workwear & Safetywear (-4.0%).

The rolling 12 months February 2018 to January 2019 were 3.6% above the same period a year earlier, with one less trading day. Ten of the twelve categories sold more. Timber & Joinery (+6.8%) did best, followed by Plumbing Heating & Electrical (+6.5%). Average sales a day in the period were 4.0% higher.

Index

January's BMBI index was 107.8, with one additional trading day and was the highest January BMBI index to date. Plumbing Heating & Electrical was top (130.8). The average sales a day Index for January was 101.6.

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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 Q4 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: Q4 2018 Report](#)



John Coe
Commercial Director
Alumasc Water Management Systems



Expert for Civils, Metal Rainwater & Drainage

[Read latest Comment: Q4 2018 Report](#)



John Duffin
Managing Director
Keylite Roof Windows



Expert for Roof Windows

[Read latest Comment: Q4 2018 Report](#)



Andrew Simpson
National Commercial Director
Hanson Cement



Expert for Cement & Aggregates

[Read latest Comment: Q4 2018 Report](#)



Nigel Cox
Managing Director
Timbmet



Expert for Timber & Panel Products

[Read latest Comment: Q4 2018 Report](#)



Paul Owen
Commercial Director Distribution
IKO PLC



Expert for Roofing Products

[Read latest Comment: Q4 2018 Report](#)

The Expert Panel

Speaking for their markets - 2



Derrick McFarland
Managing Director
Keystone Lintels

Expert for Steel Lintels



[Read latest Comment: Q4 2018 Report](#)



Tony France
Sales Director
Ibstock

Expert for Bricks



[Read latest Comment: Q4 2018 Report](#)



Neil Hargreaves
Managing Director
Knauf Insulation

Expert for Mineral Wool Insulation



[Read latest Comment: Q4 2018 Report](#)



Jeff House
Head of External Affairs
Baxi Heating UK (incorporating Heatrae Sadia)

Expert for Water Heating



[Read latest Comment: Q4 2018 Report](#)



Mike Beard
Merchant Development
Director
Encon Insulation

**Expert for Insulation Products -
Distribution**



[Read latest Comment: Q4 2018 Report](#)



Malcolm Gough
Group Sales & Marketing
Director
Talasey Group

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



[Read latest Comment: Q4 2018 Report](#)



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

Expert for Paint



[Read latest Comment: Q4 2018 Report](#)



Mike Tattam
Sales & Marketing Director
Lakes

**Expert for Shower Enclosures and
Showering**



[Read latest Comment: Q4 2018 Report](#)

Monthly: Index and Categories

January 2018* – January 2019

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



MONTHLY SALES VALUE INDEX	Index	2018												2019
		Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan
Total Builders Merchants	100	102.6	104.5	112.2	116.1	129.4	127.6	129.1	124.7	118.4	131.8	122.5	77.4	107.8
Timber & Joinery Products	100	108.0	107.6	112.9	115.9	126.7	126.2	131.1	129.3	124.7	137.2	126.8	79.9	114.7
Heavy Building Materials	100	100.5	103.3	110.8	115.9	128.7	128.0	128.8	123.9	117.8	132.4	121.8	75.6	106.6
Decorating	100	101.9	100.8	106.5	106.6	117.0	114.9	119.4	117.2	112.0	124.6	116.1	78.8	104.6
Tools	100	101.3	100.0	111.2	105.1	110.5	113.3	112.5	109.7	108.0	123.2	117.8	73.0	100.3
Workwear & Safetywear	100	117.2	107.3	108.3	100.2	96.0	95.7	95.9	98.3	107.5	123.5	129.5	79.9	111.5
Ironmongery	100	120.4	114.8	118.0	117.3	125.7	123.9	128.8	124.4	117.9	133.6	129.3	84.5	120.8
Landscaping	100	81.3	88.0	104.8	132.1	170.4	164.1	156.6	142.4	122.8	126.0	106.1	64.0	87.1
Plumbing, Heating & Electrical	100	127.2	125.2	136.1	120.4	122.7	117.1	116.8	114.5	120.4	141.1	146.5	96.9	130.8
Renewables & Water Saving	100	75.2	76.3	79.8	74.2	70.4	75.0	73.5	64.8	67.8	76.4	68.5	45.8	69.3
Kitchens & Bathrooms	100	108.2	115.2	120.3	111.9	119.2	117.8	121.4	118.4	113.0	122.5	128.2	81.2	109.5
Miscellaneous	100	114.4	113.2	114.2	111.3	120.5	115.3	116.8	113.9	106.6	126.3	119.1	85.1	122.7
Services	100	93.1	96.4	107.3	109.6	125.4	116.9	121.1	120.1	106.9	125.1	114.2	79.9	94.5

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

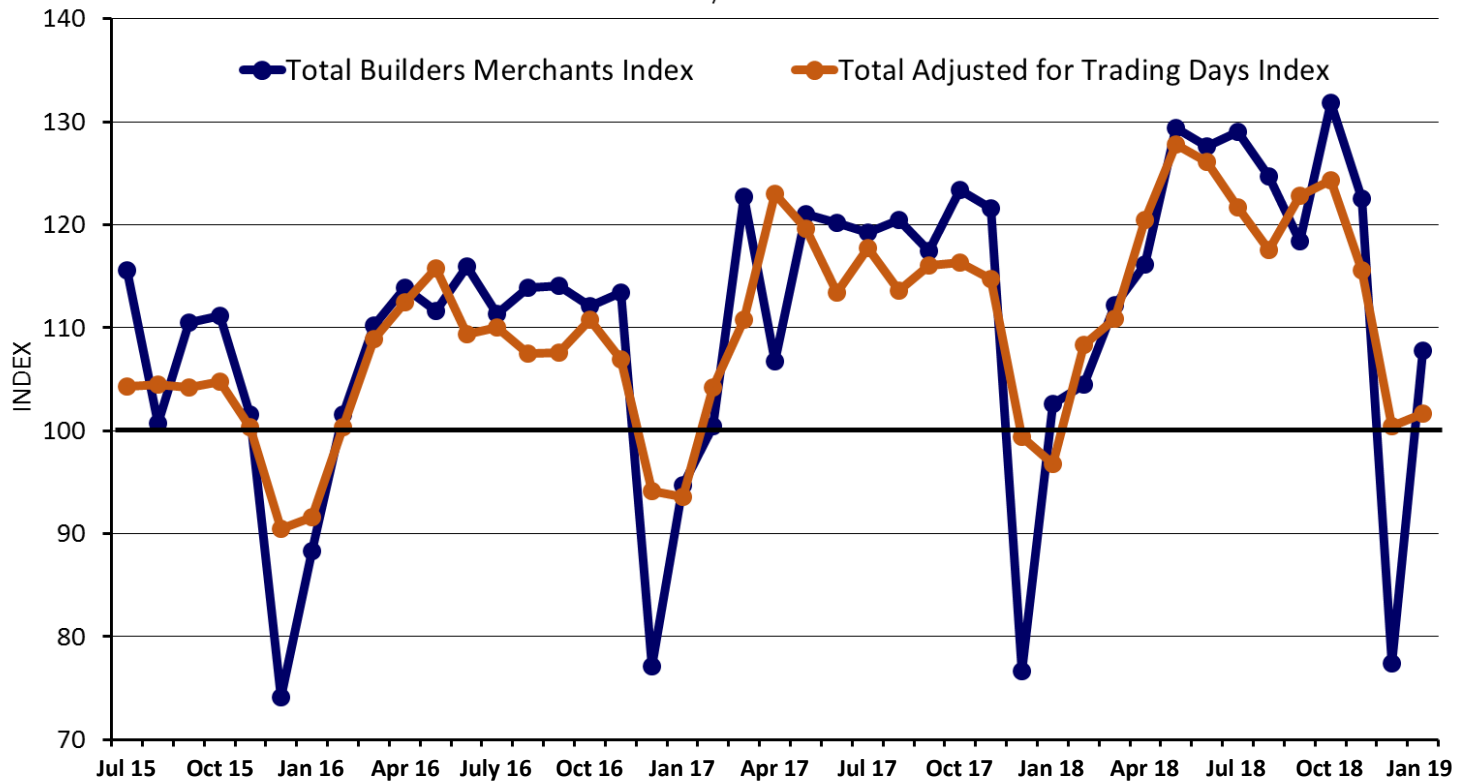
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

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: 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 20 22 22 16 22

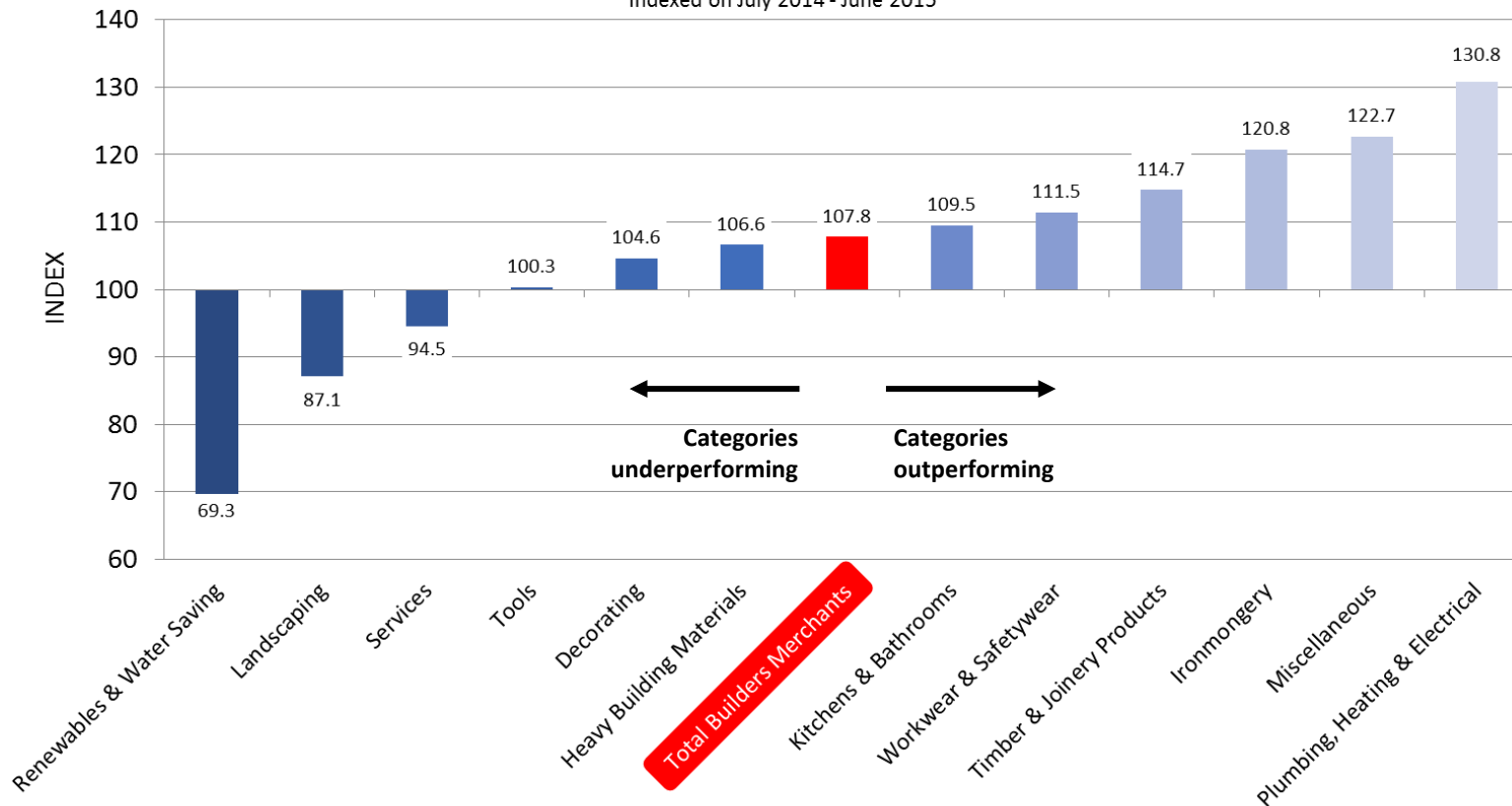
 Source: GfK's Builders Merchants Total Category Report July 2015 to January 2019

Monthly: Index and Categories

January 2019 index

January 2019 Index

Indexed on July 2014 - June 2015

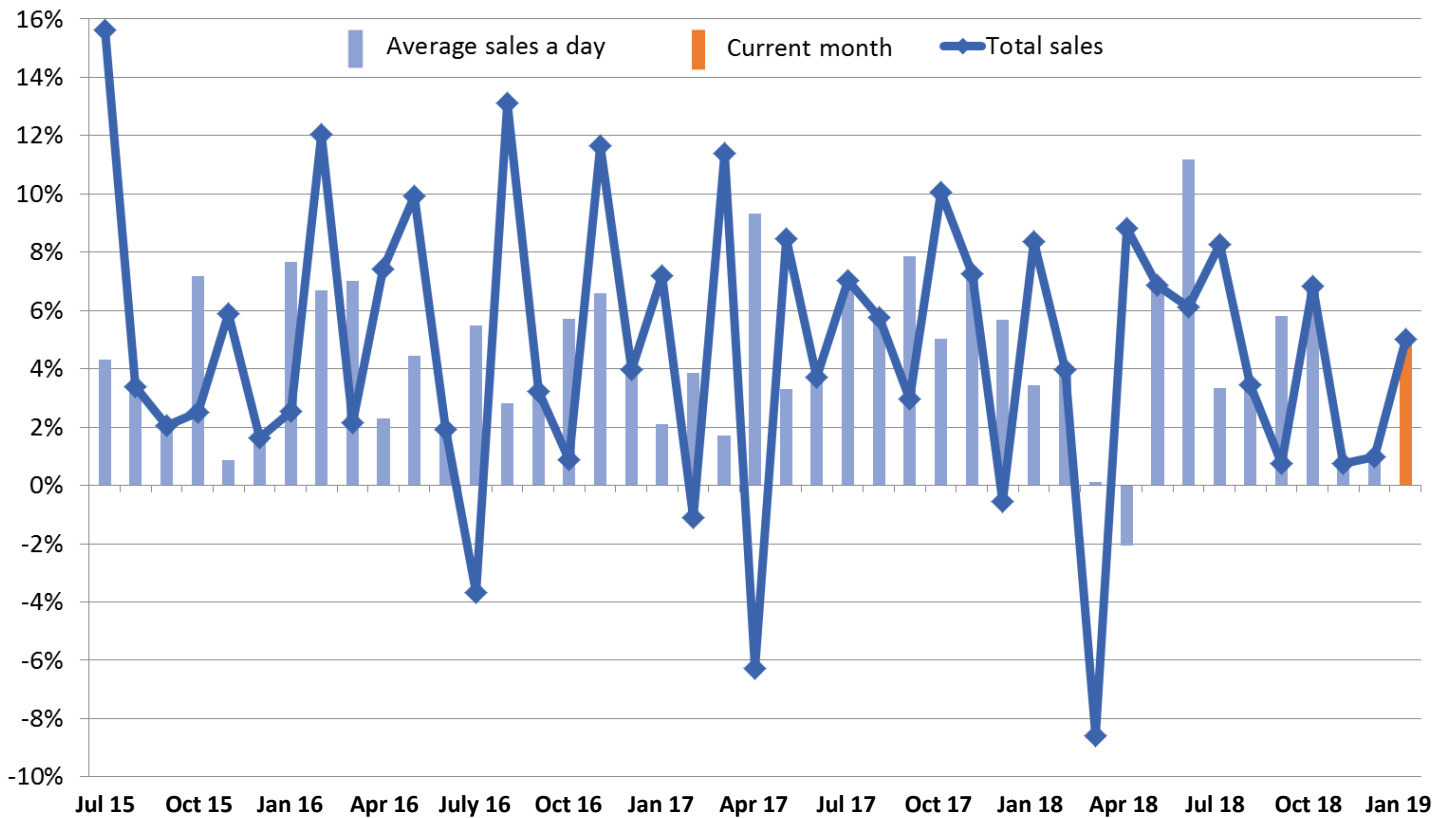


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: Sales Indices

Adjusted and unadjusted for trading days

Monthly: Year on Year



Trading days:

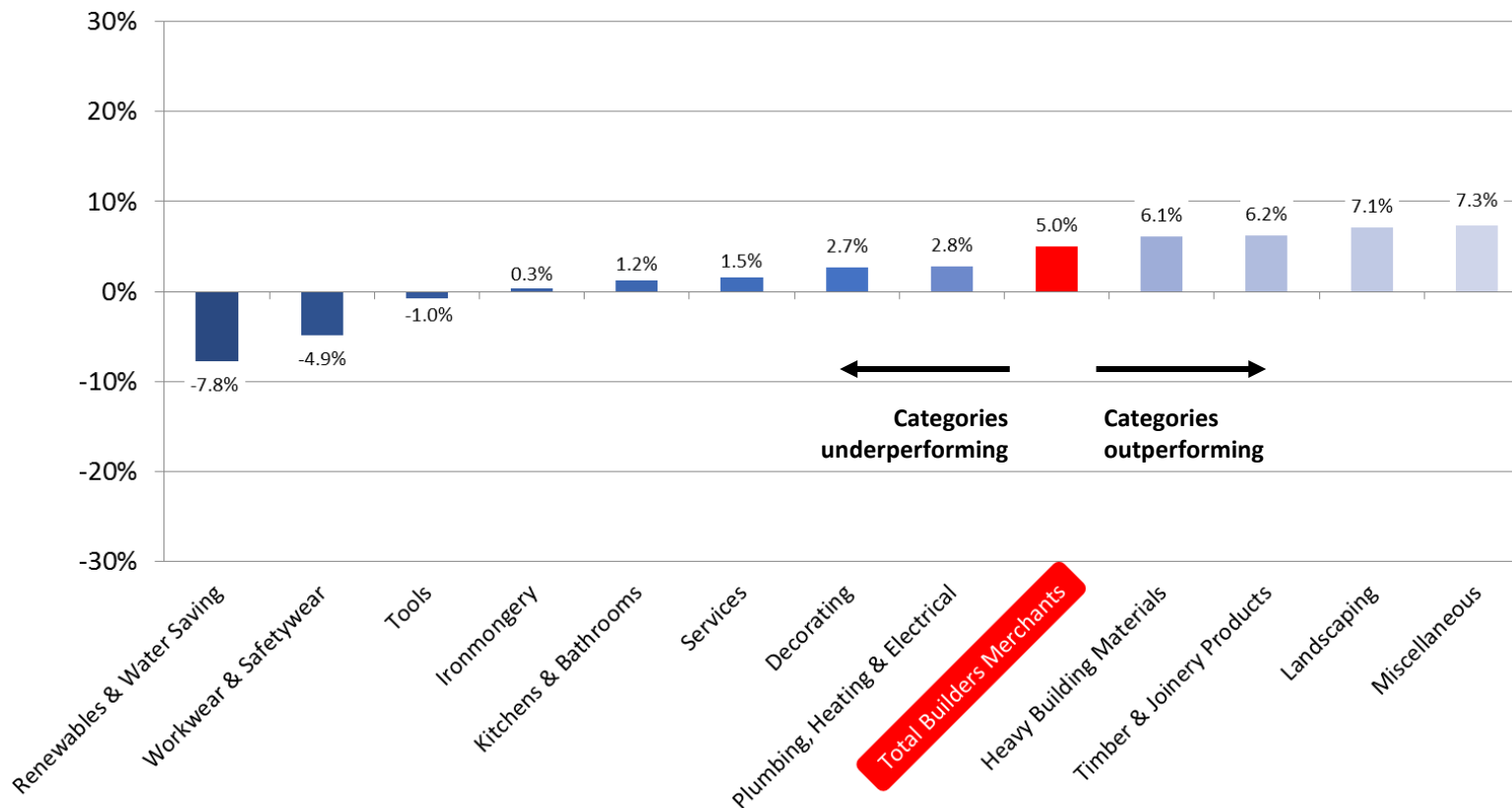
Index Months: 20.8 23 20 22 22 21 17 20 21 21 21 20 22 21 22 22 21 22 22 21 20 23 18 21 22 21 22 22 21 22 22 16 22 20 21 20 21 21 22 22 20 22 22 20 22 22 16 22

 Source: GfK's Builders Merchants Total Category Report July 2015 to January 2019

Monthly: This Year v Last Year

January 2019 sales indices

January 2019 index v January 2018 index

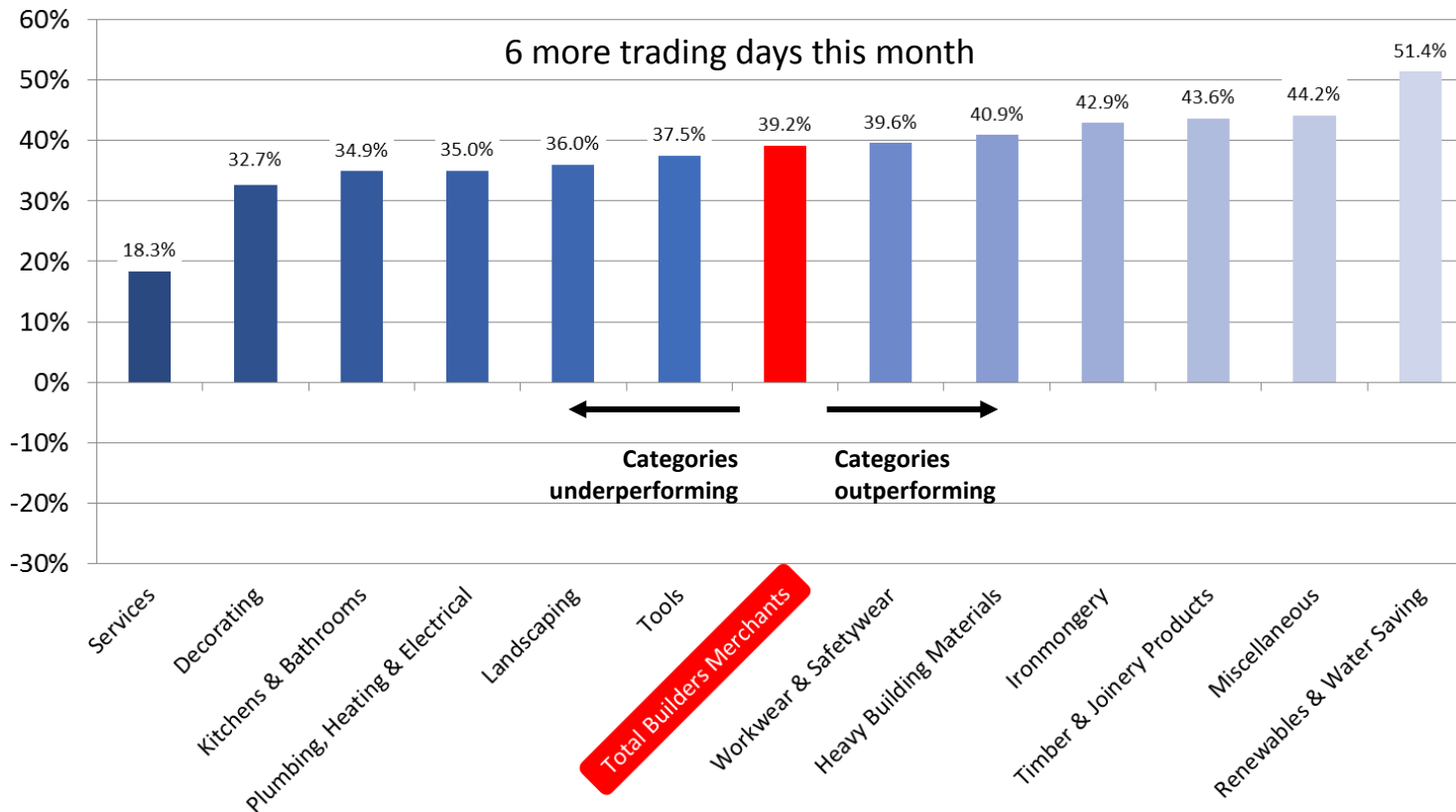


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: This Month v Last Month

January 2019 sales indices

January 2019 index v December 2018 index



 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: This Month v Last Month

January 2019 average sales a day indices

January 2019 index v December 2018 index



 Source: GfK's Builders Merchants Total Category Report July 2015 to January 2019

Quarterly: Index and Categories

Quarter 4 2017* to Quarter 4 2018

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q4 2017	Q1 2018	Q2 2018	Q3 2018	Q4 2018
Total Builders Merchants	100	107.2	106.4	124.4	124.0	110.6
Timber & Joinery Products	100	108.1	109.5	122.9	128.3	114.7
Heavy Building Materials	100	107.9	104.9	124.2	123.5	109.9
Decorating	100	102.3	103.0	112.8	116.2	106.5
Tools	100	104.7	104.2	109.6	110.1	104.7
Workwear & Safetywear	100	110.0	110.9	97.3	100.6	110.9
Ironmongery	100	115.2	117.8	122.3	123.7	115.8
Landscaping	100	93.8	91.4	155.5	140.6	98.7
Plumbing, Heating & Electrical	100	122.7	129.5	120.1	117.2	128.1
Renewables & Water Saving	100	69.1	77.1	73.2	68.7	63.6
Kitchens & Bathrooms	100	111.6	114.6	116.3	117.6	110.6
Miscellaneous	100	111.4	113.9	115.7	112.4	110.1
Services	100	100.7	98.9	117.3	116.1	106.4

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

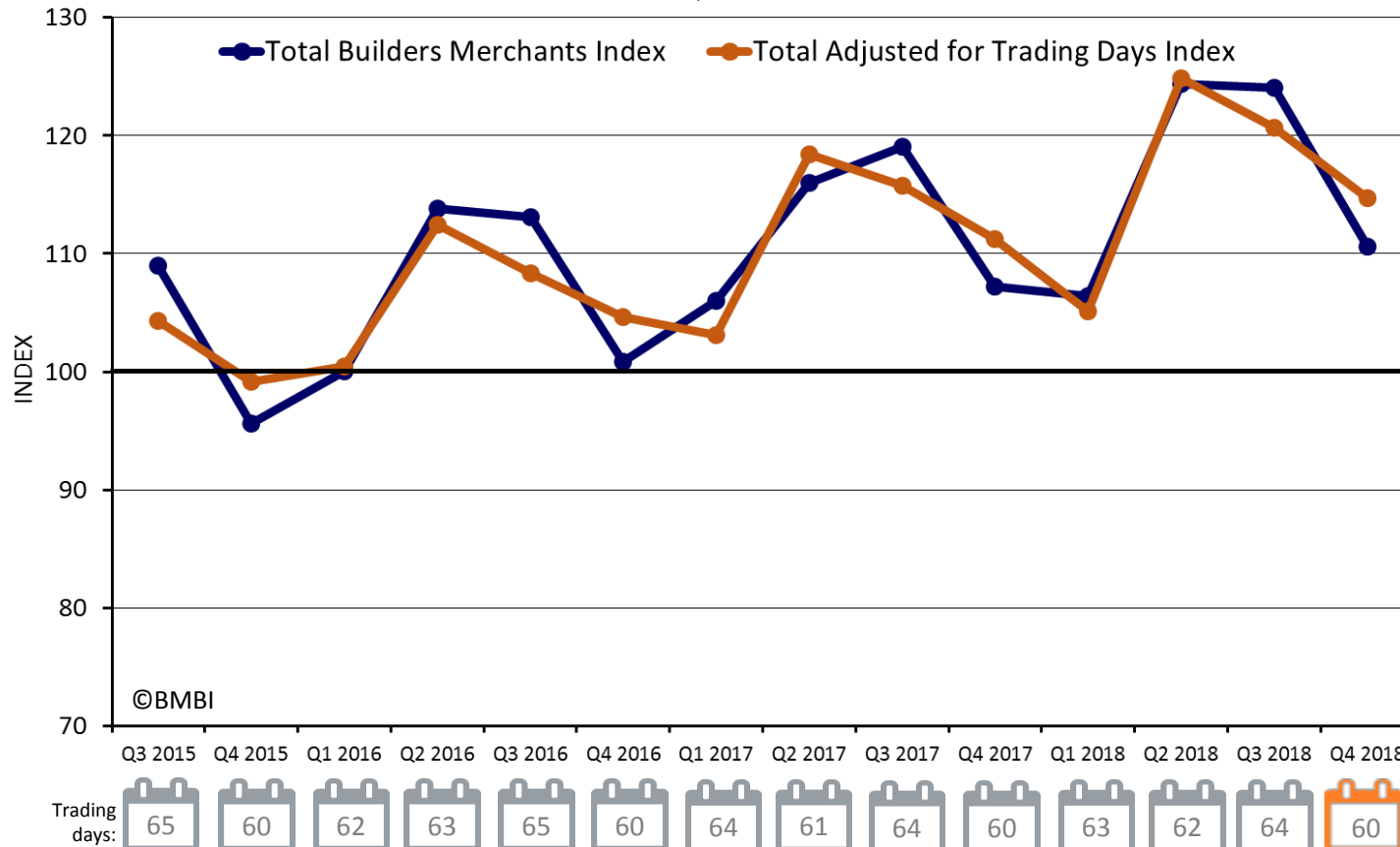
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2018

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



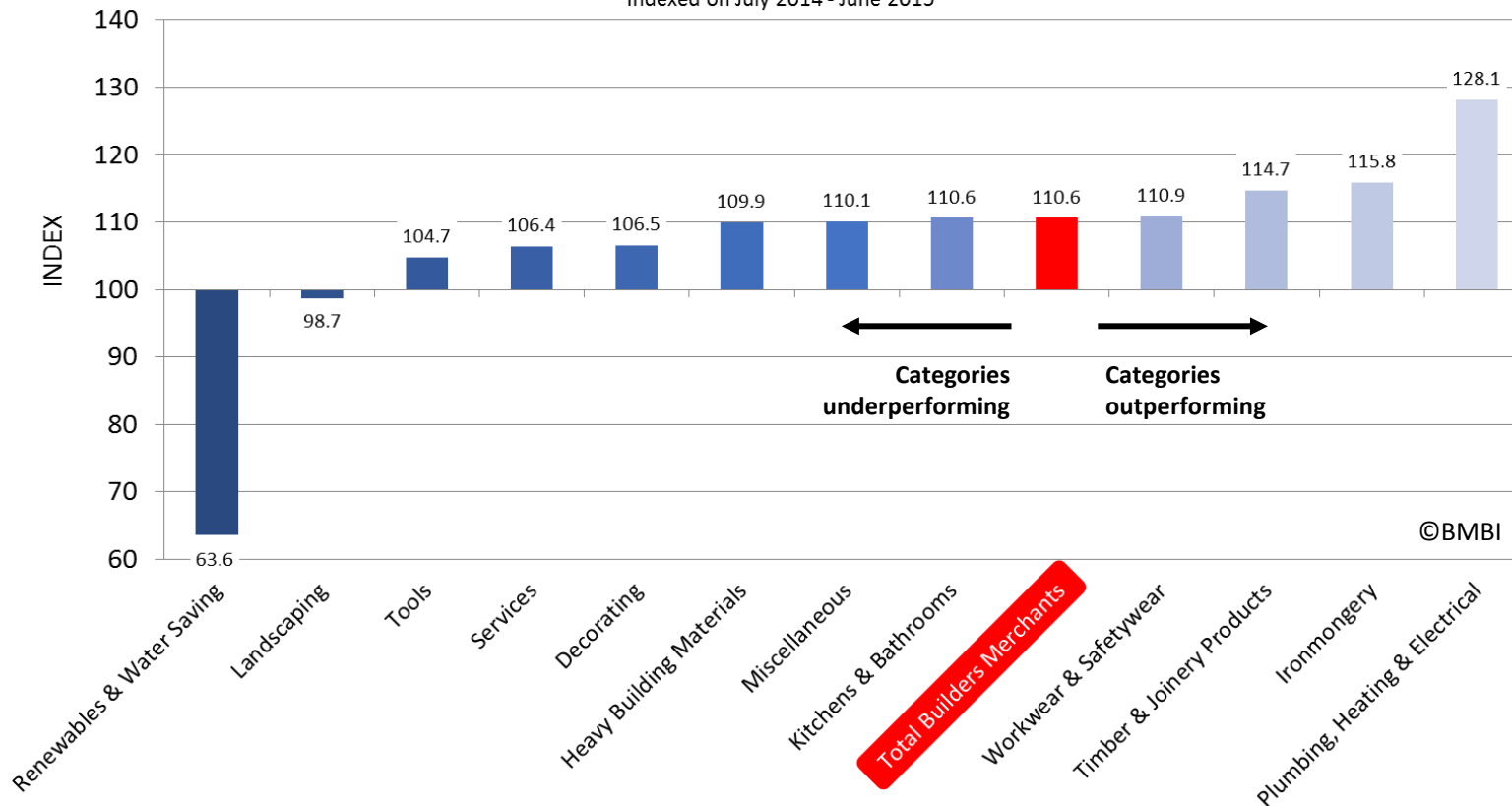
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2018

Quarterly: Index and Categories

Q4 2018 index

Quarter 4 2018

Indexed on July 2014 - June 2015



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

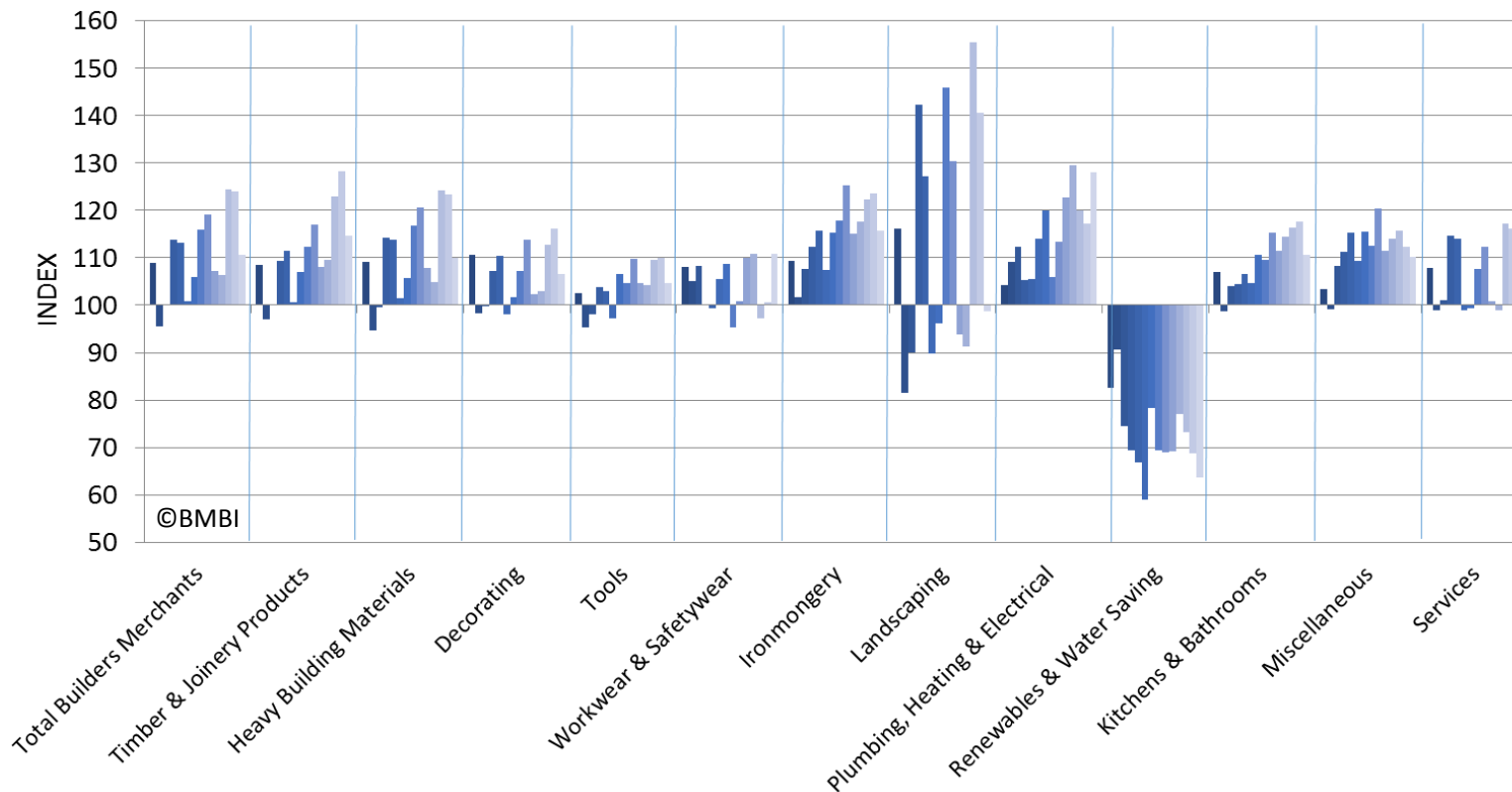
Quarterly: Index and Categories

Quarterly indices

Quarterly Indices

Indexed on July 2014 to June 2015

Chart shows quarterly indices, by category, from Q3 2015 (darkest blue) to Q4 2018 (lightest blue)

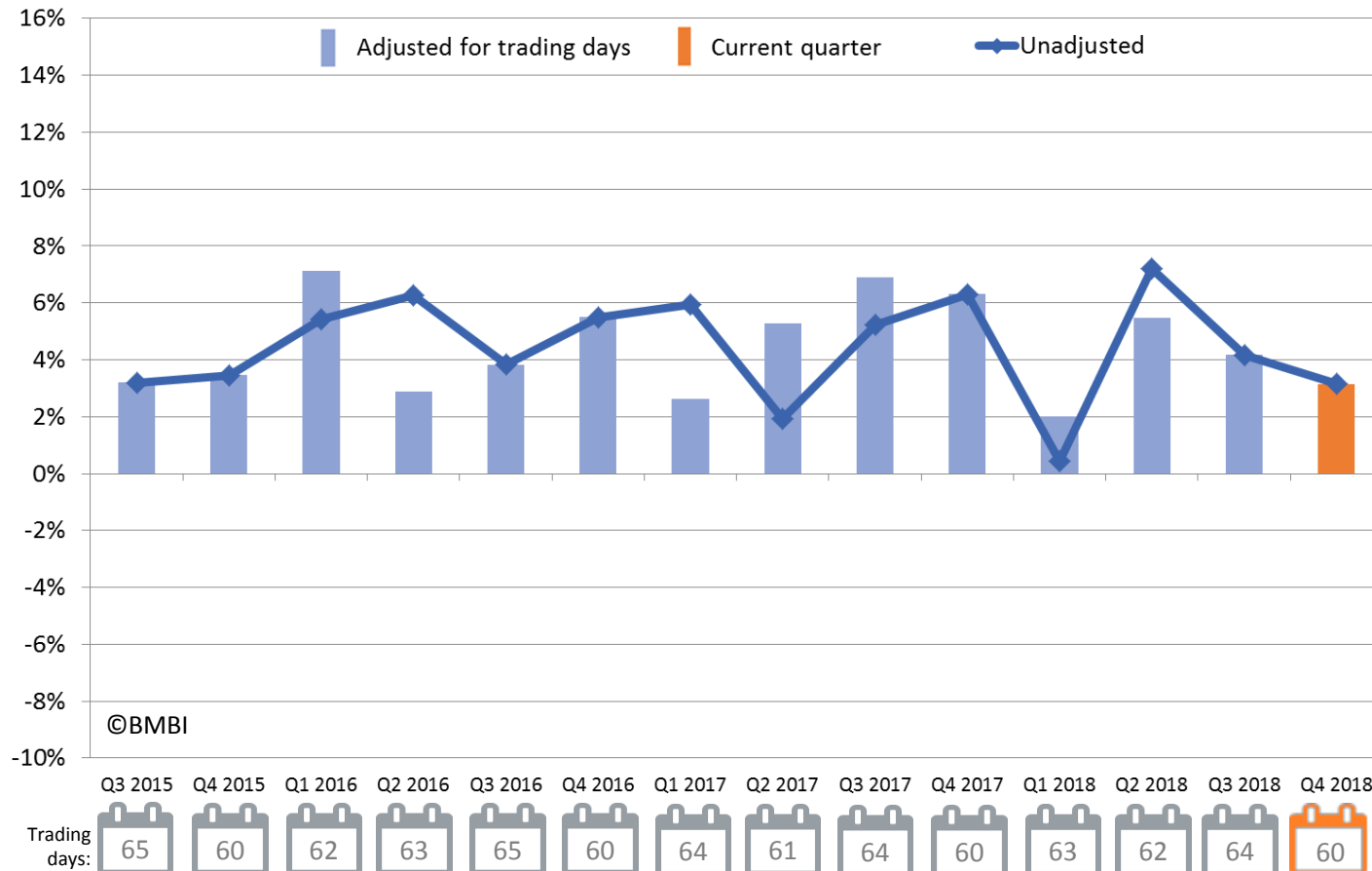


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2018

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year

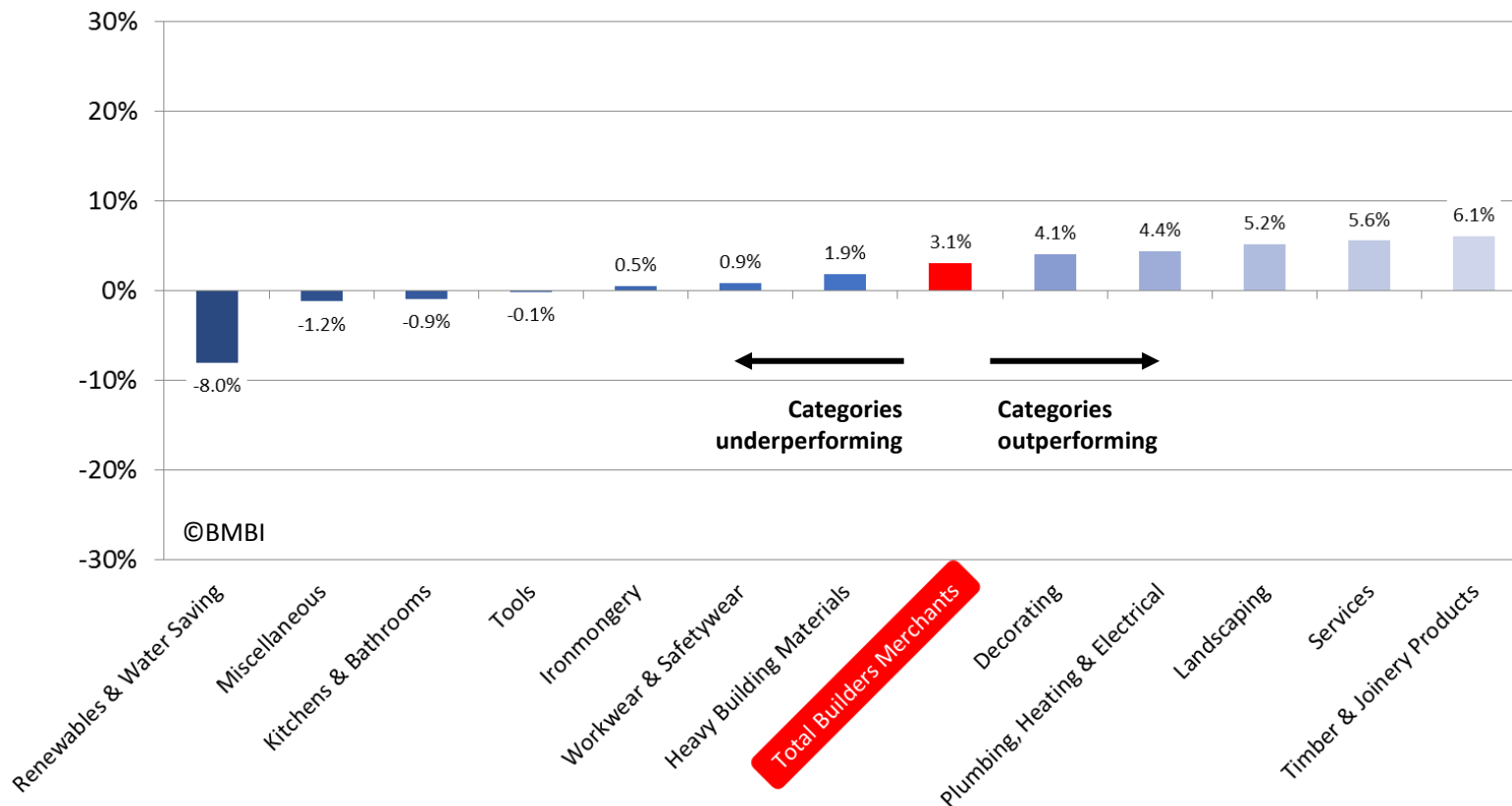


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2018

Quarterly: This Year v Last Year

Q4 2018 sales indices

Quarter 4 2018 index v Quarter 4 2017 index

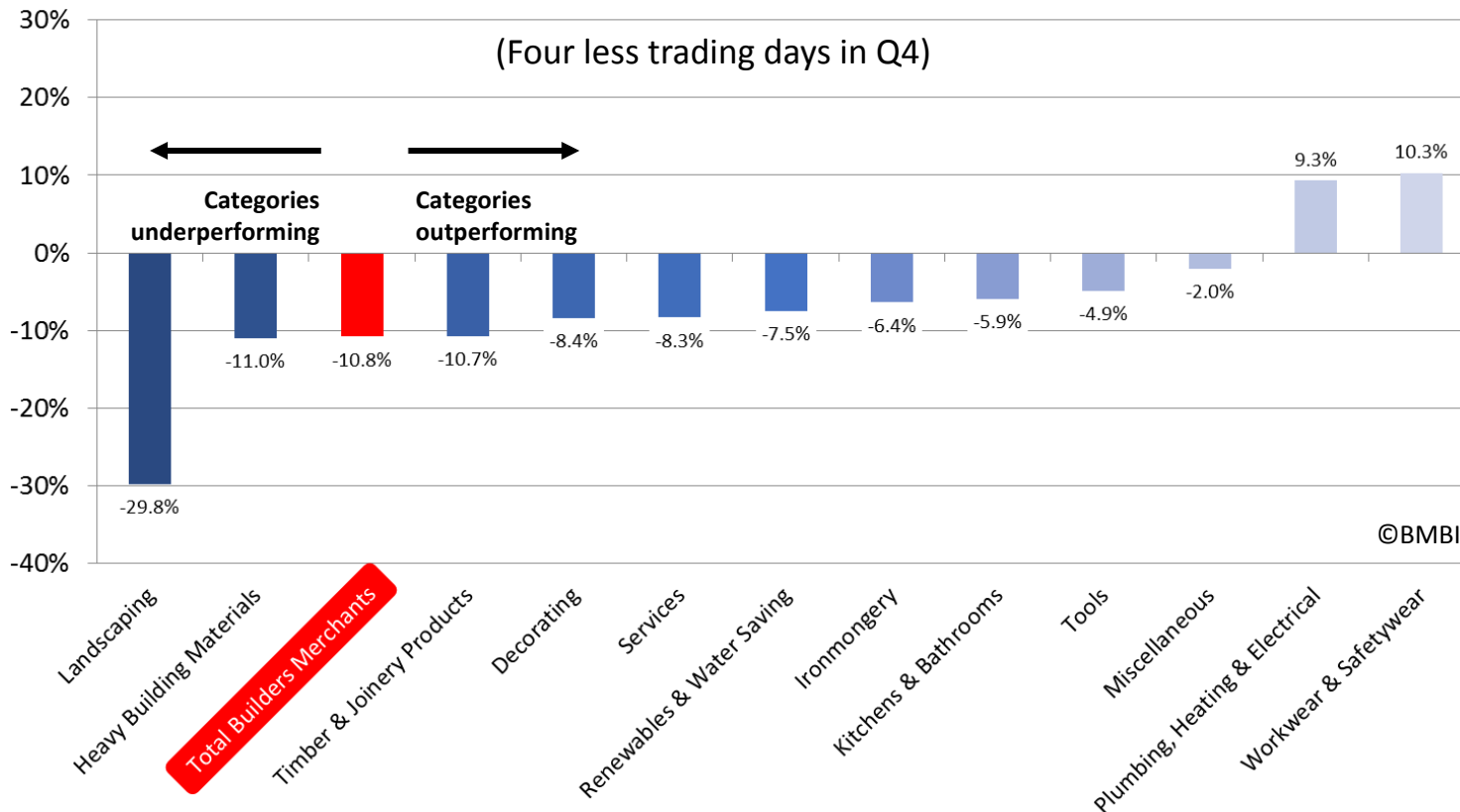


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2018

Quarterly: Quarter on Quarter

Q4 2018 sales indices

Quarter 4 2018 index v Quarter 3 2018 index

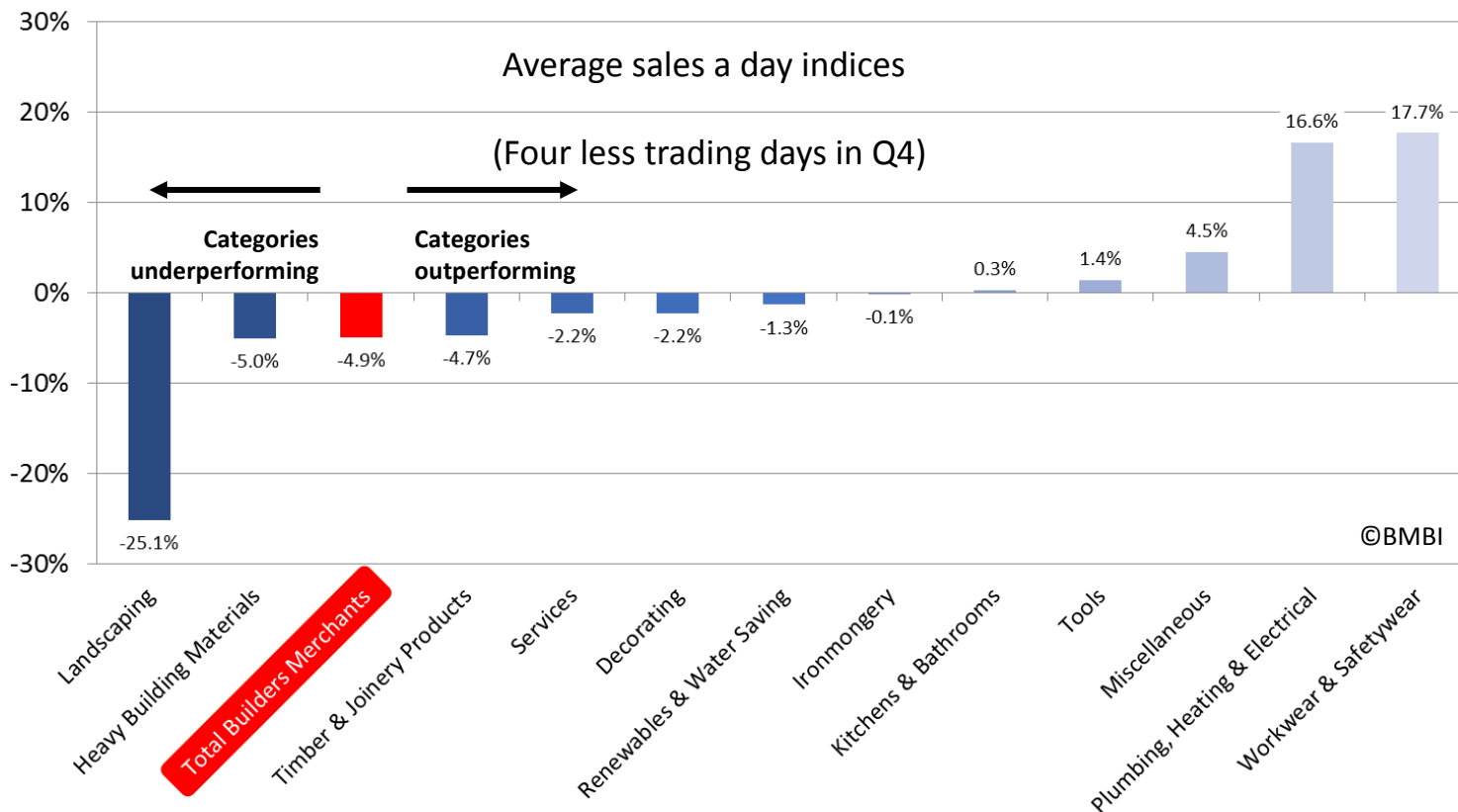


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2018

Quarterly: Quarter on Quarter

Q4 2018 average sales a day indices

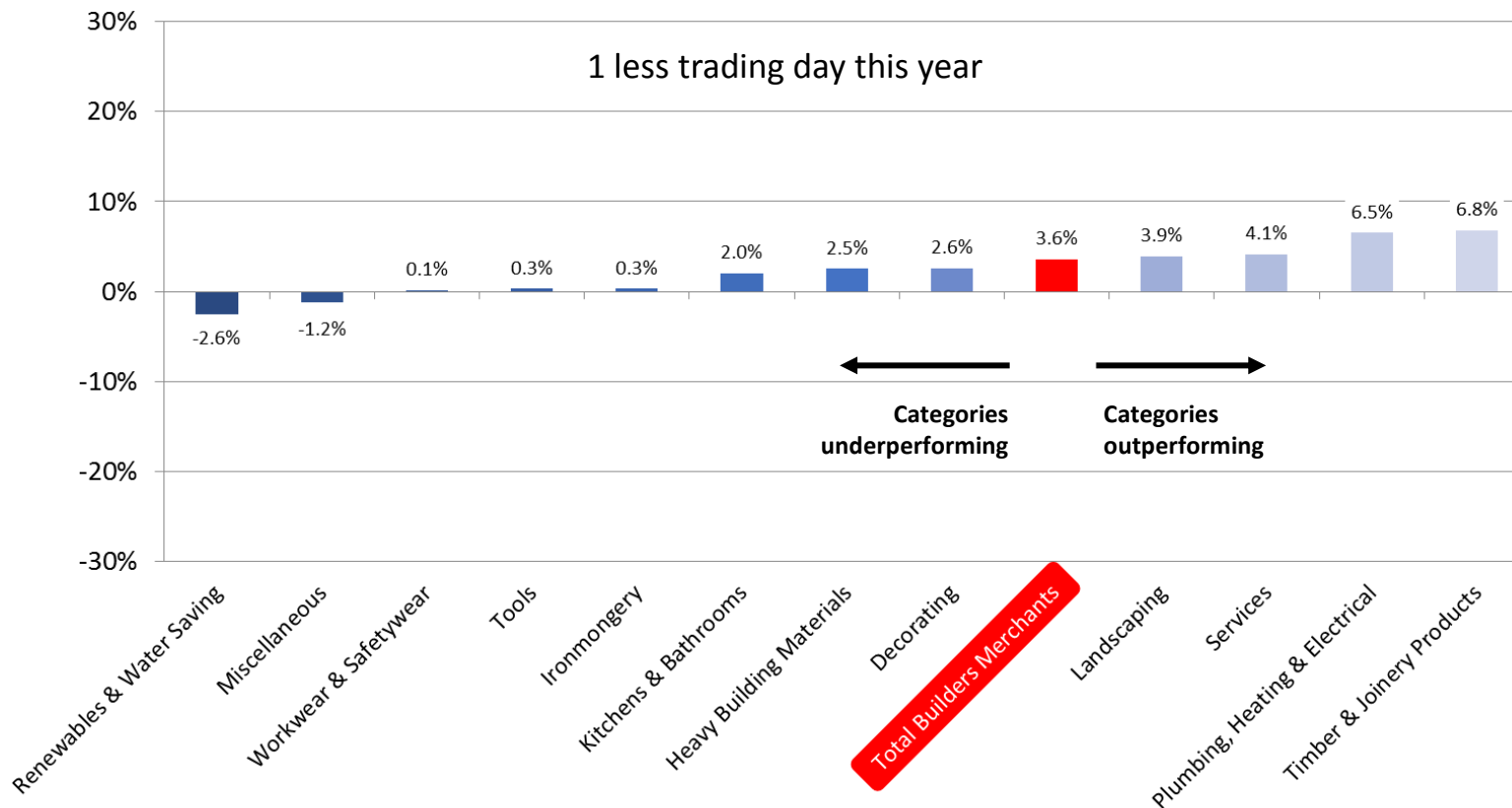
Quarter 4 2018 Index v Quarter 3 2018 Index



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

Last 12 Months: Year on Year

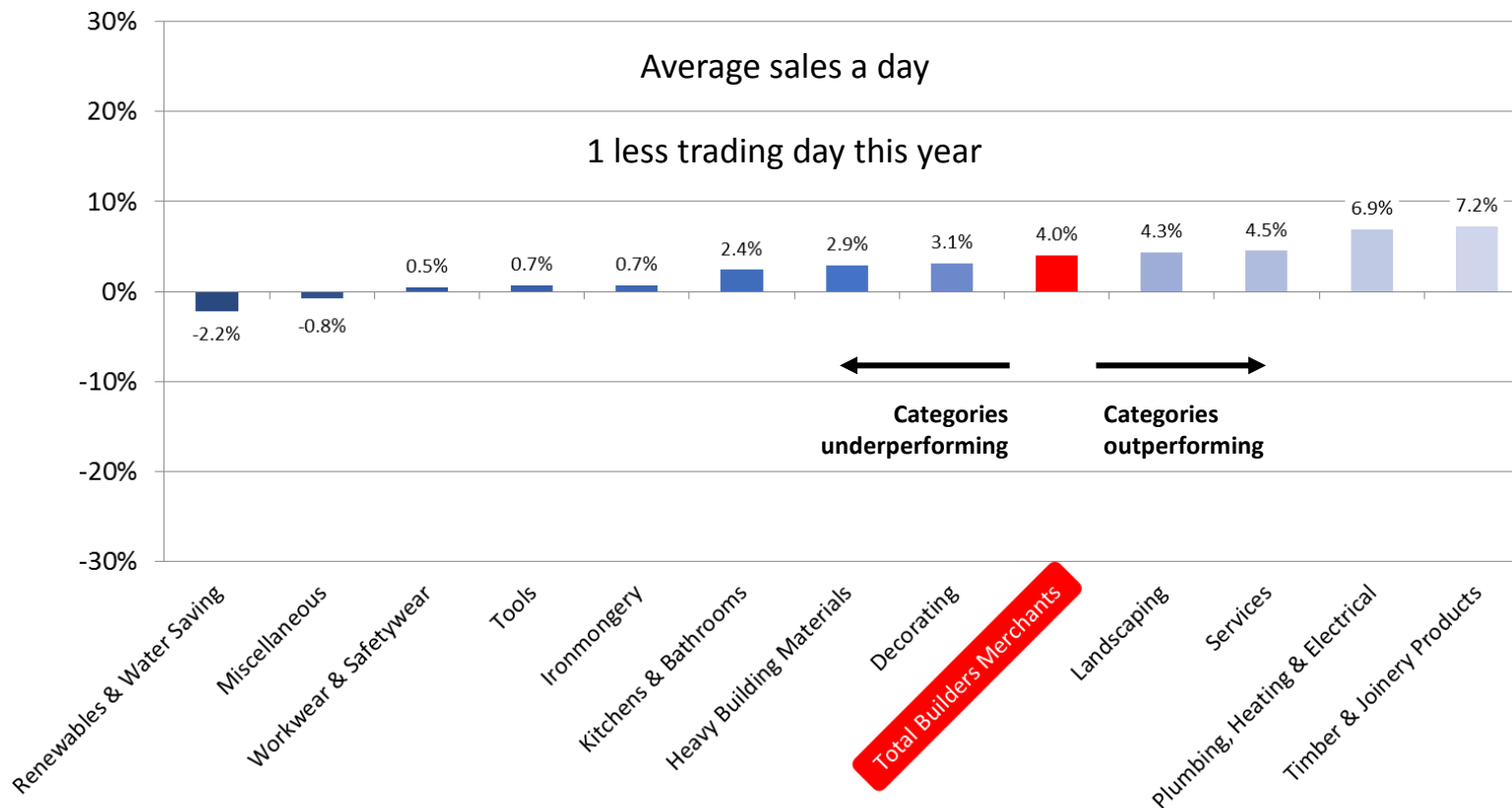
12 months Feb 18 to Jan 19 v 12 months Feb 17 to Jan 18



 Source: GfK's Builders Merchants Total Category Report July 2015 to January 2019

12 Months: Year on Year Average sales a day indices

12 months Feb 18 to Jan 19 v 12 months Feb 17 to Jan 18

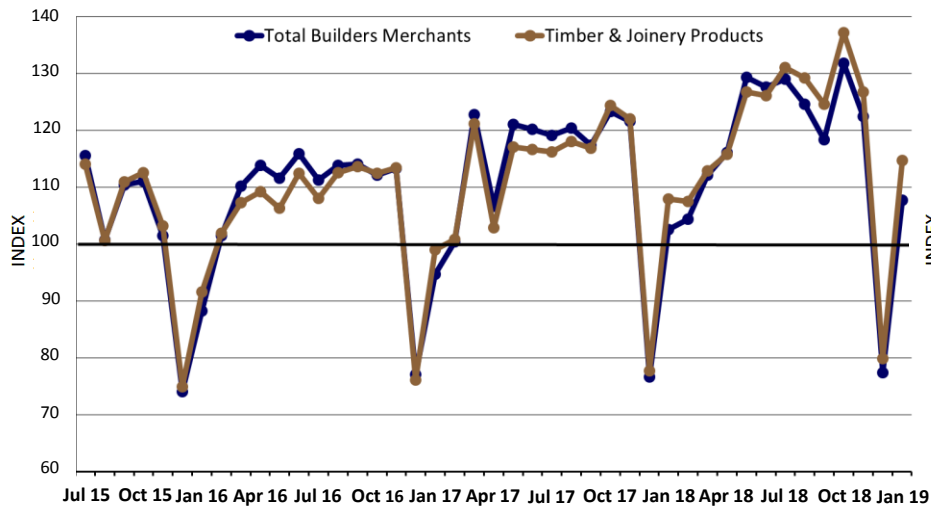


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: Indices

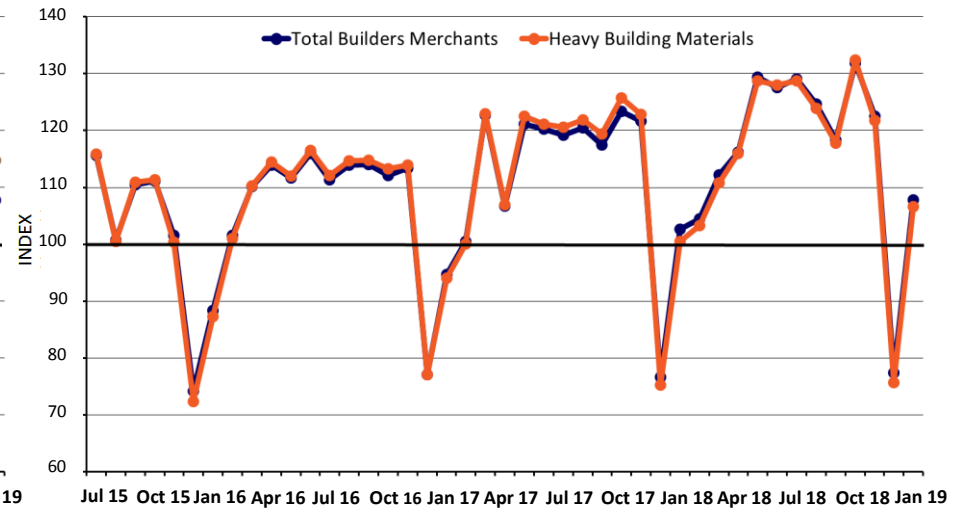
January 2019

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



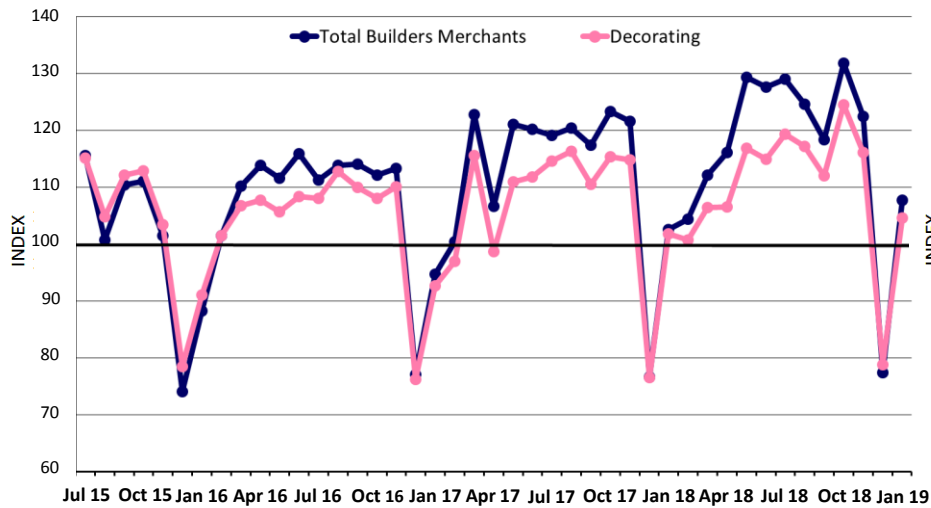
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: Indices

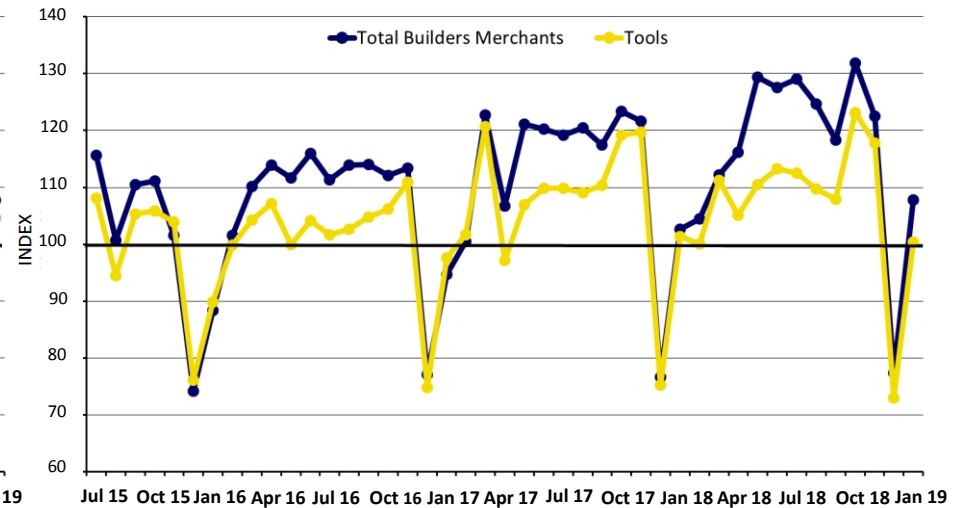
January 2019

Decorating




Indexed on July 2014 – June 2015

Tools



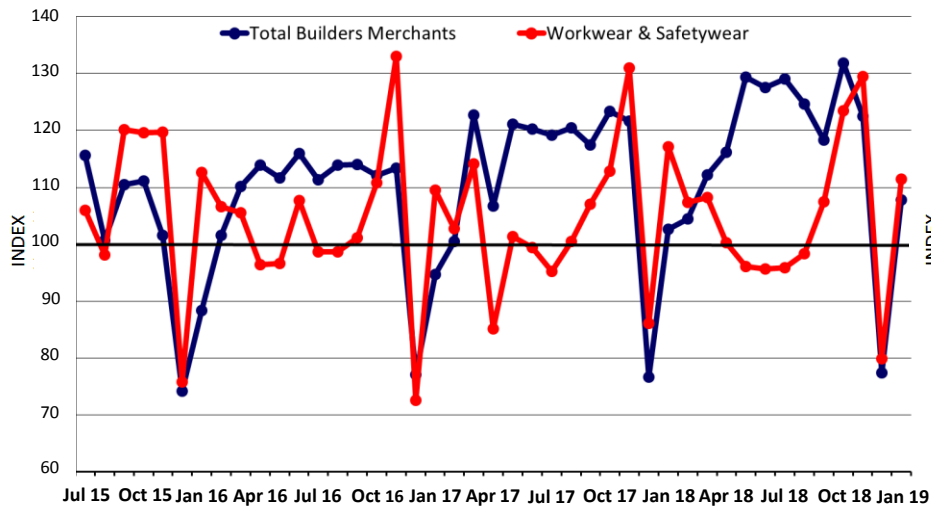
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: Indices

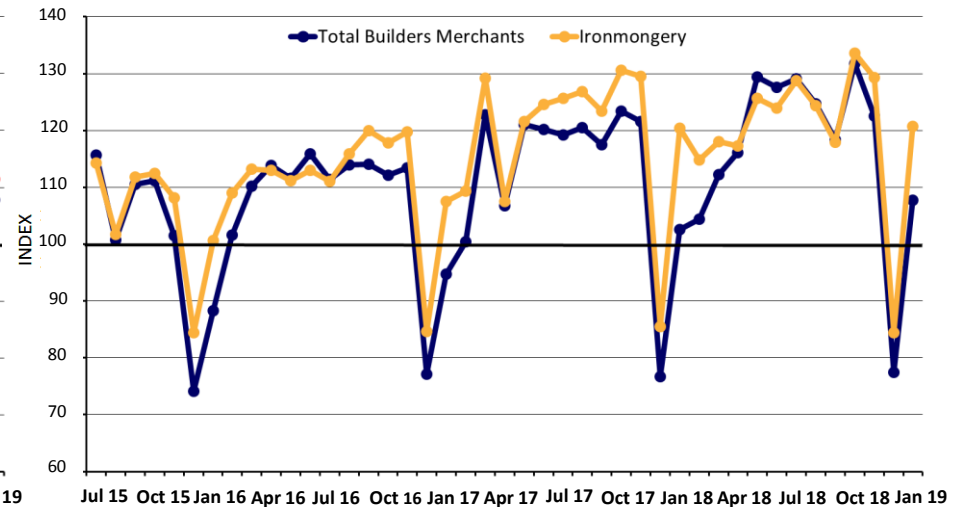
January 2019

Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery

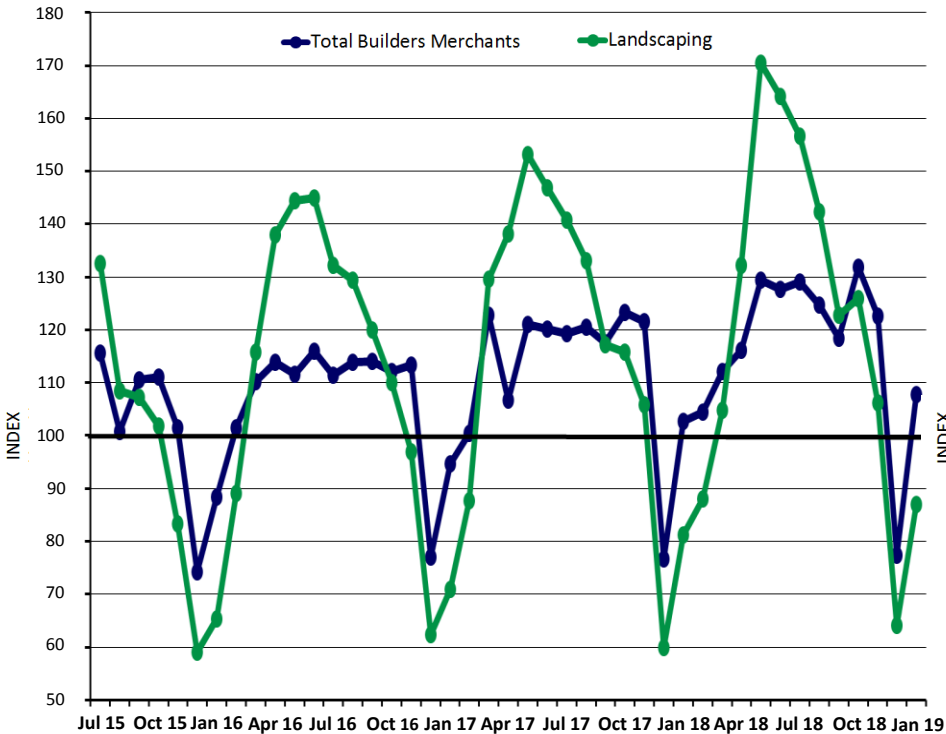


Indexed on July 2014 – June 2015

Monthly: Indices

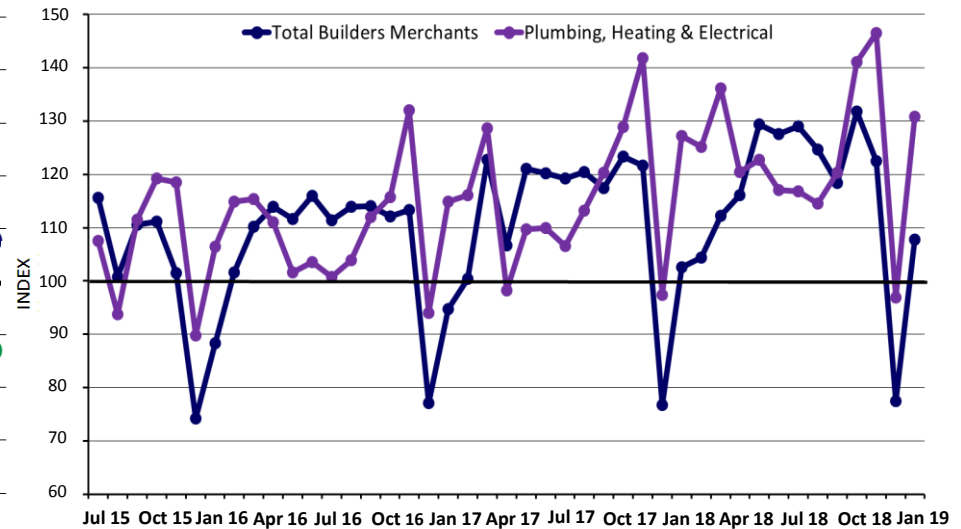
January 2019

Landscaping




Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

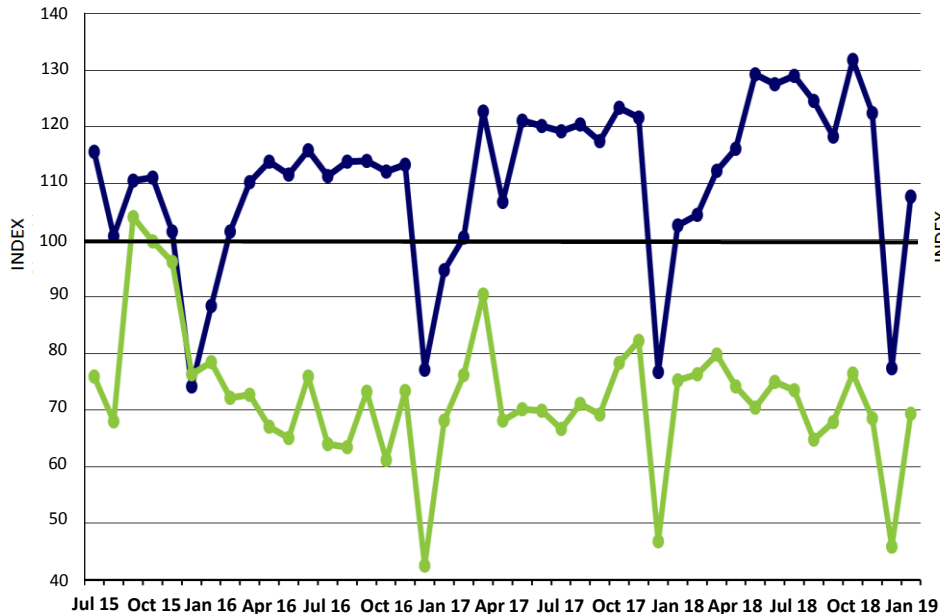
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

Monthly: Indices

January 2019

Renewables & Water Saving

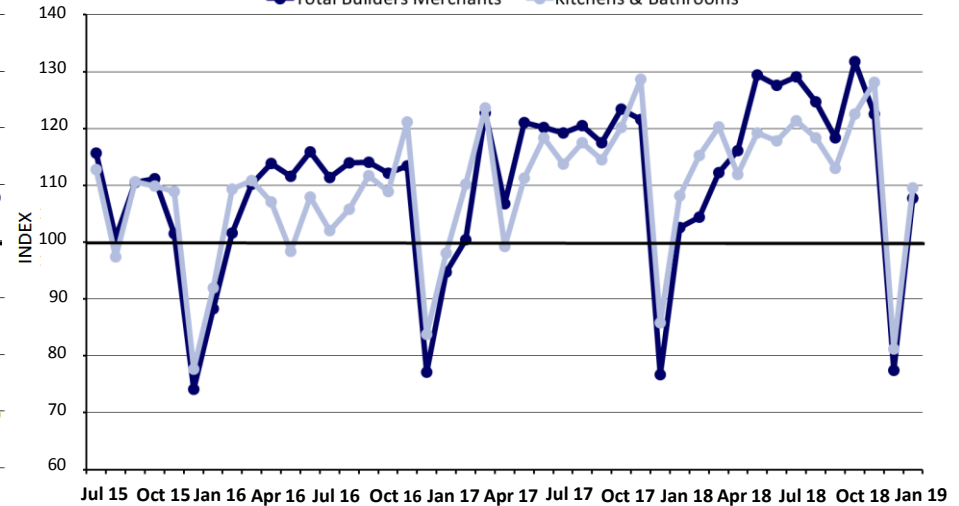
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms

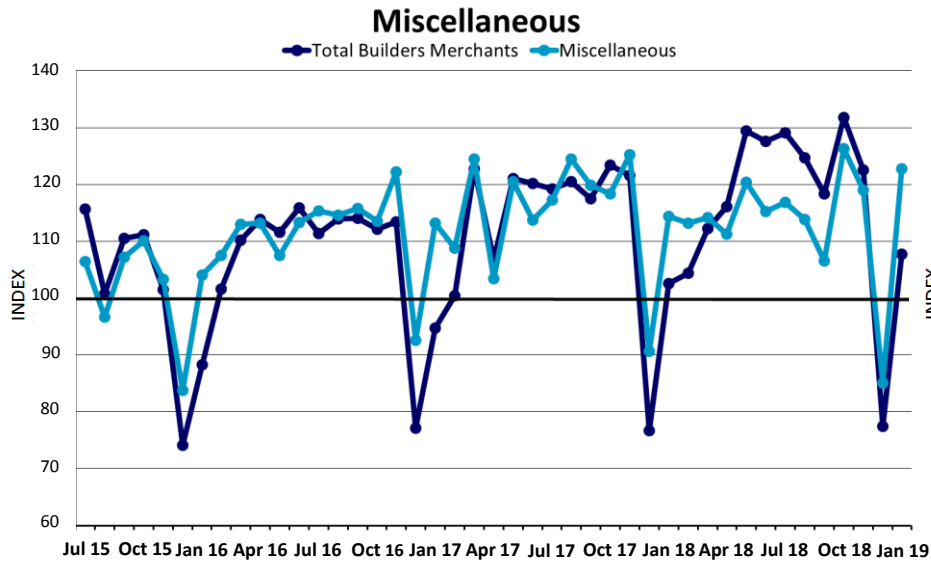
● Total Builders Merchants ● Kitchens & Bathrooms



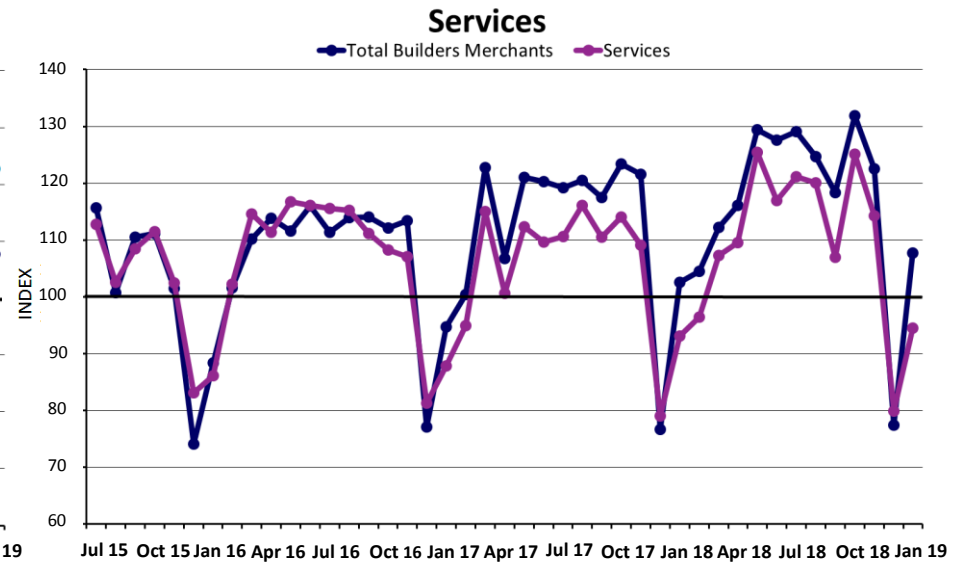
Indexed on July 2014 – June 2015

Monthly: Indices


January 2019



Indexed on July 2014 – June 2015



Indexed on July 2014 – June 2015

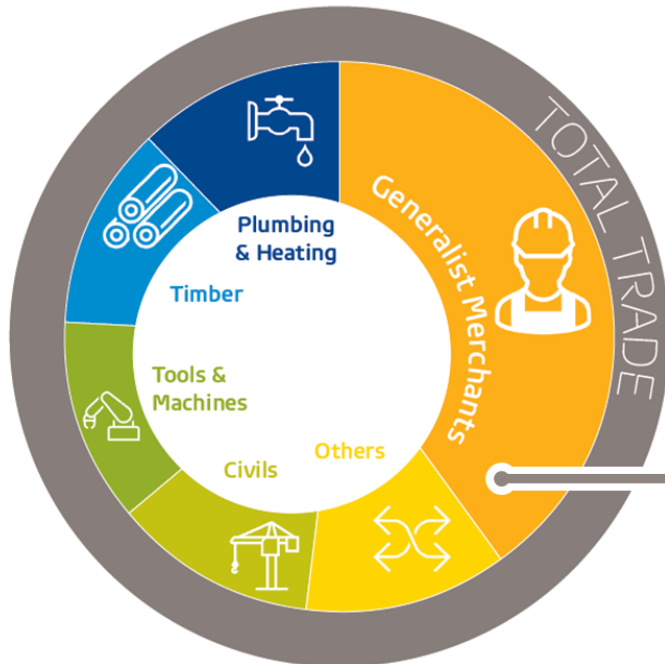
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to January 2019

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

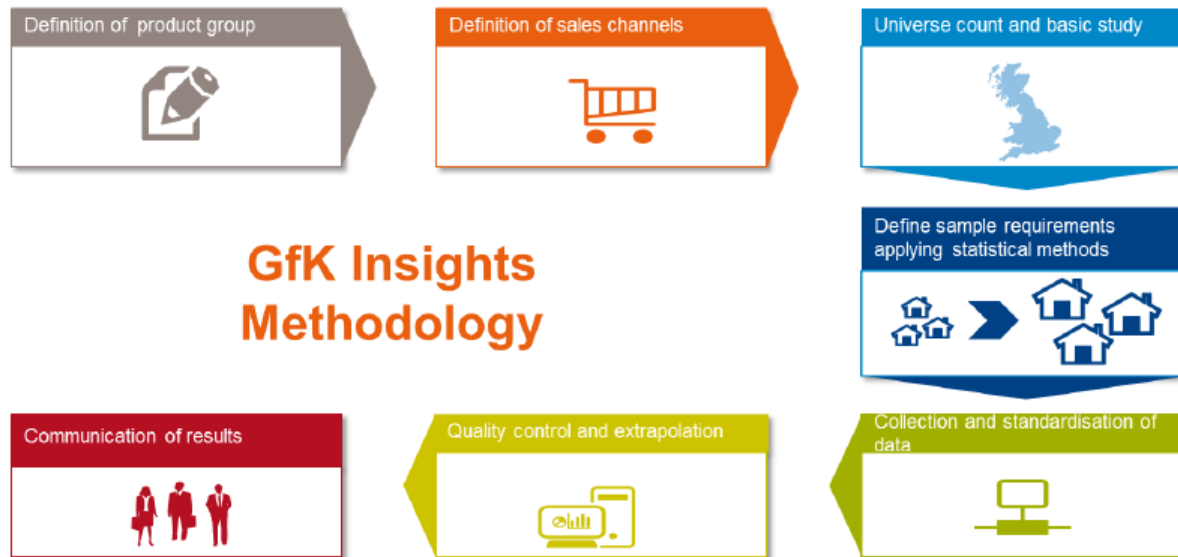
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

TOTAL CATEGORY REPORT (TCR)



TRACKED PRODUCT GROUP REPORTING



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



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