

“building **excellence**  
in materials supply”

# Builders Merchant Building Index



Monthly report for February 2019

# Building the Industry & Building Brands from Knowledge



# Contents - 1

Click links below to visit pages

Click links to visit pages:	Page
<a href="#">Introduction</a>	<a href="#">5</a>
<a href="#">Overview</a>	<a href="#">6</a>
<a href="#">BMBI Expert Panel</a>	<a href="#">7-8</a>
<b>Monthly data:</b>	
<a href="#">Monthly BMBI indices, by category</a>	<a href="#">9</a>
<a href="#">Monthly index chart, unadjusted and adjusted for trading day differences</a>	<a href="#">10</a>
<a href="#">February index chart, by category</a>	<a href="#">11</a>
<a href="#">Monthly year-on-year chart, unadjusted and adjusted for trading day differences</a>	<a href="#">12</a>
<a href="#">February year-on-year sales index chart, by category</a>	<a href="#">13</a>
<a href="#">February v January sales index chart, by category</a>	<a href="#">14</a>
<a href="#">February v January average sales a day index chart, by category</a>	<a href="#">15</a>
<b>Quarterly data:</b>	
<a href="#">Quarterly BMBI indices, by category</a>	<a href="#">16</a>
<a href="#">Quarter 4 index chart, unadjusted and adjusted for trading day differences</a>	<a href="#">17</a>
<a href="#">Quarter 4 index chart, by category</a>	<a href="#">18</a>
<a href="#">Quarterly indices, by category</a>	<a href="#">19</a>
<a href="#">Quarter 4 year-on-year chart, unadjusted and adjusted for trading day differences</a>	<a href="#">20</a>
<a href="#">Quarter 4 year-on-year sales index chart, by category</a>	<a href="#">21</a>
<a href="#">Quarter 4 v Quarter 3 sales index chart, by category</a>	<a href="#">22</a>
<a href="#">Quarter 4 v Quarter 3 average sales a day index chart, by category</a>	<a href="#">23</a>

Continued over the page...

Click links above and overleaf to visit pages. The 'Contents' link below brings you back to this page.

# Contents - 2

Continued: click links below to visit pages



Click links to visit pages:	Page
<b>Full Year data:</b>	
<a href="#">Latest 12 months compared with previous 12 months chart, by category</a>	<a href="#">24</a>
<a href="#">Latest 12 months average sales a day compared with previous 12 months chart, by category</a>	<a href="#">25</a>
<b>Monthly Category Charts:</b>	
<a href="#">Timber &amp; Joinery Products</a>	<a href="#">26</a>
<a href="#">Heavy Building Materials</a>	<a href="#">26</a>
<a href="#">Decorating</a>	<a href="#">27</a>
<a href="#">Tools</a>	<a href="#">27</a>
<a href="#">Workwear &amp; Safetywear</a>	<a href="#">28</a>
<a href="#">Ironmongery</a>	<a href="#">28</a>
<a href="#">Landscaping</a>	<a href="#">29</a>
<a href="#">Plumbing Heating &amp; Electrical</a>	<a href="#">29</a>
<a href="#">Renewables &amp; Water Saving</a>	<a href="#">30</a>
<a href="#">Kitchens &amp; Bathrooms</a>	<a href="#">30</a>
<a href="#">Miscellaneous</a>	<a href="#">31</a>
<a href="#">Services</a>	<a href="#">31</a>
<a href="#">Methodology</a>	<a href="#">32 – 34</a>
<a href="#">Contacts</a>	<a href="#">35</a>

Quarterly reports contain additional analysis, macro-economic factors and expert comments. Click the images below to read or download the Q4 report.

The collage features several report covers and charts:

- Monthly and Quarterly Indices (December 2018 and Q4 2018):** Shows line and bar charts for Plumbing, Heating & Electrical. The line chart tracks the Builders Merchant Building Index (BMBI) from Jan 2018 to Dec 2018, with a quarterly view for Q4 2018. The bar chart shows monthly sales data for the same period.
- GfK's Product Categories:** A dashboard titled 'Macro factors impacting Merchants' and 'Consumer Confidence Index' (GfK). It includes a line chart for the Consumer Confidence Index (UK) and a list of product categories with their respective values.
- Expert Panel Water Heating:** A report cover for HEATRAESADIA featuring Jeff House, Head of External Affairs. The text discusses market performance in Q4, noting a mixed picture in the UK with good performance in plumbing and heating, particularly during October and November. It also mentions a 10% reduction in demand for hot water cylinders in the residential sector.
- In-depth product group reporting:** A report cover for HEATRAESADIA featuring a photo of a man. The text highlights a 'continuing positive trend for combination boilers in housing B2B' and notes a '5% reduction in demand for hot water cylinders in the residential sector'.

# 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

## February sales growth driven by outside trades

### Year on year

Extreme weather can make comparisons difficult. Twelve months ago the country was hit by the 'Beast From the East', which spanned late February and early March. While construction was affected (especially outside trades), merchants sold 4.1% more in February 2018 than in February 2017. Against this background, Total Builders Merchant value sales in February 2019 were up 4.1% compared with February 2018 – and up 8.2% compared with February 2017.

A relatively dry and mild February this year helped outside trades. Landscaping (+11.6%) and the largest categories Heavy Building Materials (+4.7%) and Timber & Joinery Products (+4.3%) did better than merchants overall. Decorating (+2.5%) grew more slowly and Plumbing Heating & Electrical (+0.4%) and Kitchens & Bathrooms (+0.0%) were flat.

### Month on month

With February having two fewer trading days, sales were 0.9% higher than in January. Average sales a day (which takes trading day differences into account) were up 11.0%. Four categories did better, including Landscaping (+24.1%), Kitchens & Bathrooms (+15.8%) and Heavy Building Materials (+11.6%). Tools (+9.4%), Timber & Joinery Products (+7.6%) and Plumbing Heating & Electrical (+5.7%) were among six categories that grew more slowly. Only Workwear & Safetywear (-4.5%) sold less each day.

### Other periods

Cumulative sales for January and February were 4.5% ahead of the same period last year. Landscaping (+9.4%) was strongest, with Heavy Building Materials and Timber & Joinery Products both up 5.3%.

The rolling 12 months March 2018 to February 2019 were 3.6% above the same period a year earlier, with one less trading day. Timber & Joinery did best (+6.6%). Average sales a day in the period were 4.0% higher.

### Index

February's BMBI index was 108.7, the highest February BMBI index to date. Plumbing Heating & Electrical was top (125.7). The average sales a day Index for February was 112.8.

Total merchant sales in February were 4.1% higher than in February 2018 and 8.2% above February 2017, driven by outside trades.

# 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

## February 2018\* – February 2019

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



MONTHLY SALES VALUE INDEX	Index	2018											2019	
		Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb
<b>Total Builders Merchants</b>	<b>100</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>	<b>77.4</b>	<b>107.8</b>	<b>108.7</b>
Timber & Joinery Products	100	107.6	112.9	115.9	126.7	126.2	131.1	129.3	124.7	137.2	126.8	79.9	114.7	112.2
Heavy Building Materials	100	103.3	110.8	115.9	128.7	128.0	128.8	123.9	117.8	132.4	121.8	75.6	106.6	108.1
Decorating	100	100.8	106.5	106.6	117.0	114.9	119.4	117.2	112.0	124.6	116.1	78.8	104.6	103.3
Tools	100	100.0	111.2	105.1	110.5	113.3	112.5	109.7	108.0	123.2	117.8	73.0	100.3	99.8
Workwear & Safetywear	100	107.3	108.3	100.2	96.0	95.7	95.9	98.3	107.5	123.5	129.5	79.9	111.5	96.8
Ironmongery	100	114.8	118.0	117.3	125.7	123.9	128.8	124.4	117.9	133.6	129.3	84.5	120.8	115.5
Landscaping	100	88.0	104.8	132.1	170.4	164.1	156.6	142.4	122.8	126.0	106.1	64.0	87.1	98.2
Plumbing, Heating & Electrical	100	125.2	136.1	120.4	122.7	117.1	116.8	114.5	120.4	141.1	146.5	96.9	130.8	125.7
Renewables & Water Saving	100	76.3	79.8	74.2	70.4	75.0	73.5	64.8	67.8	76.4	68.5	45.8	69.3	65.7
Kitchens & Bathrooms	100	115.2	120.3	111.9	119.2	117.8	121.4	118.4	113.0	122.5	128.2	81.2	109.5	115.3
Miscellaneous	100	113.2	114.2	111.3	120.5	115.3	116.8	113.9	106.6	126.3	119.1	85.1	122.7	111.6
Services	100	96.4	107.3	109.6	125.4	116.9	121.1	120.1	106.9	125.1	114.2	79.9	94.5	99.7

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

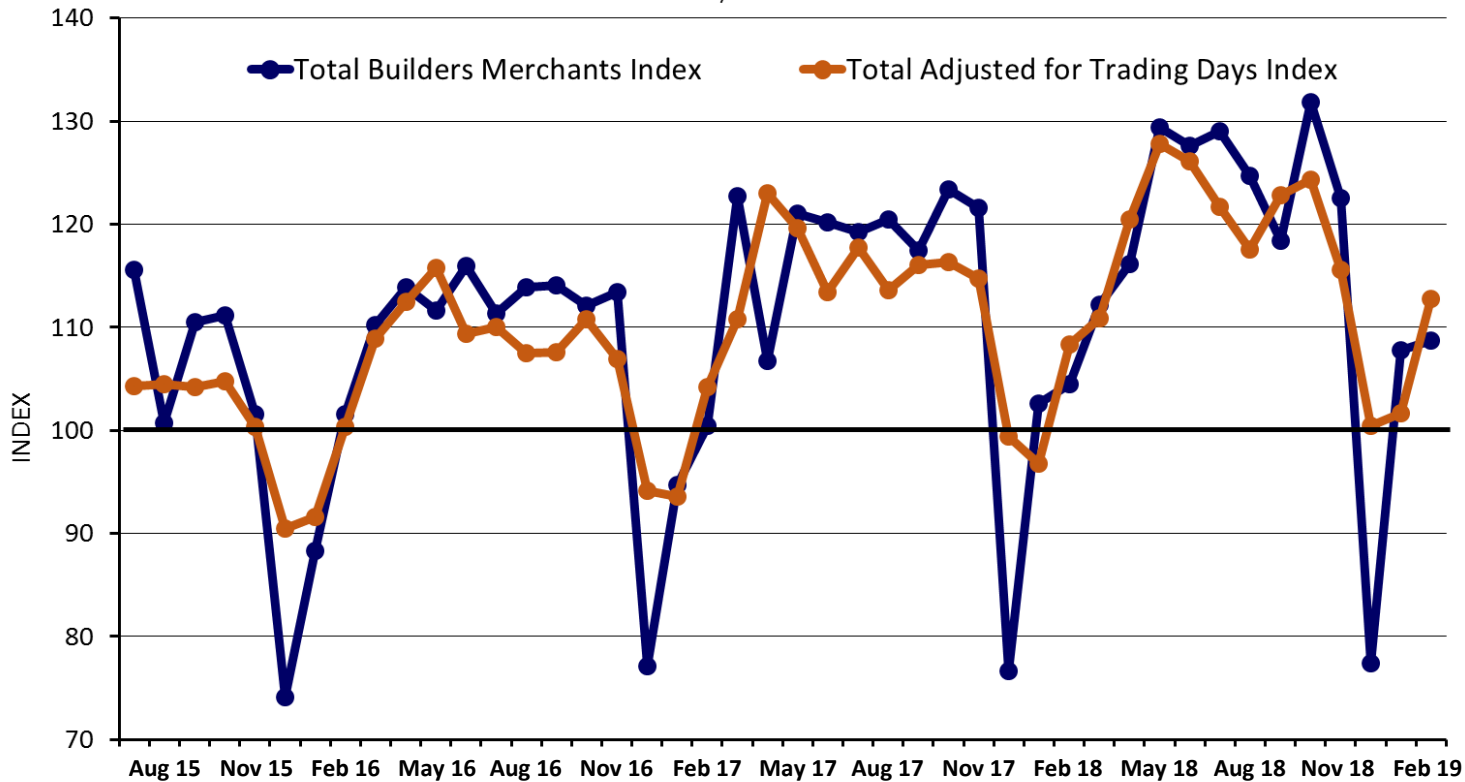
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2019

# 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 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 20 21 20 21 21 22 20 22 22 16 22 20

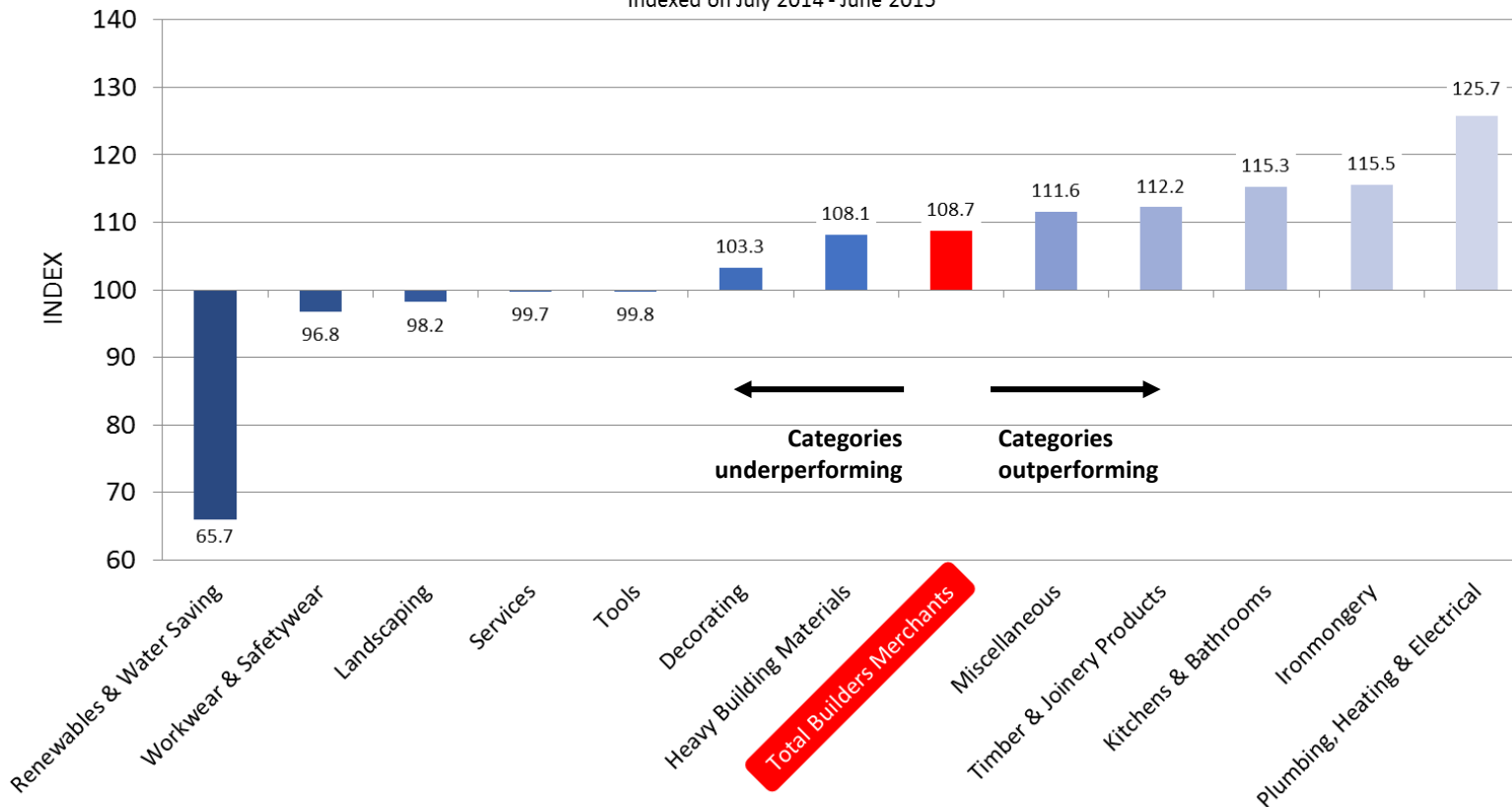
Source: GfK's Builders Merchants Total Category Report July 2015 to February 2019

# Monthly: Index and Categories

## February 2019 index

### February 2019 Index

Indexed on July 2014 - June 2015

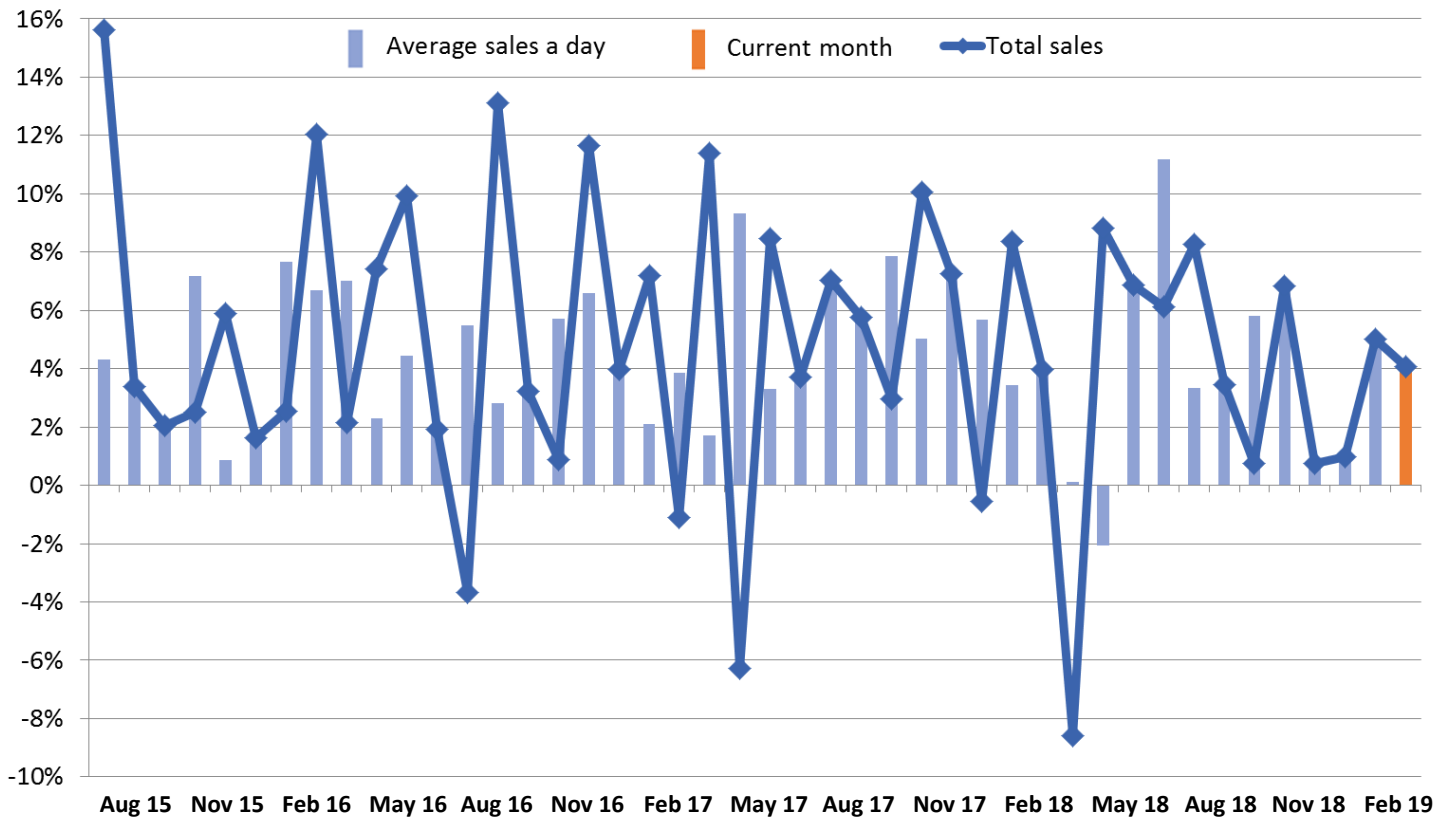


 Source: GfK's Builders Merchants Total Category Report July 2015 to February 2019

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year



Trading days:

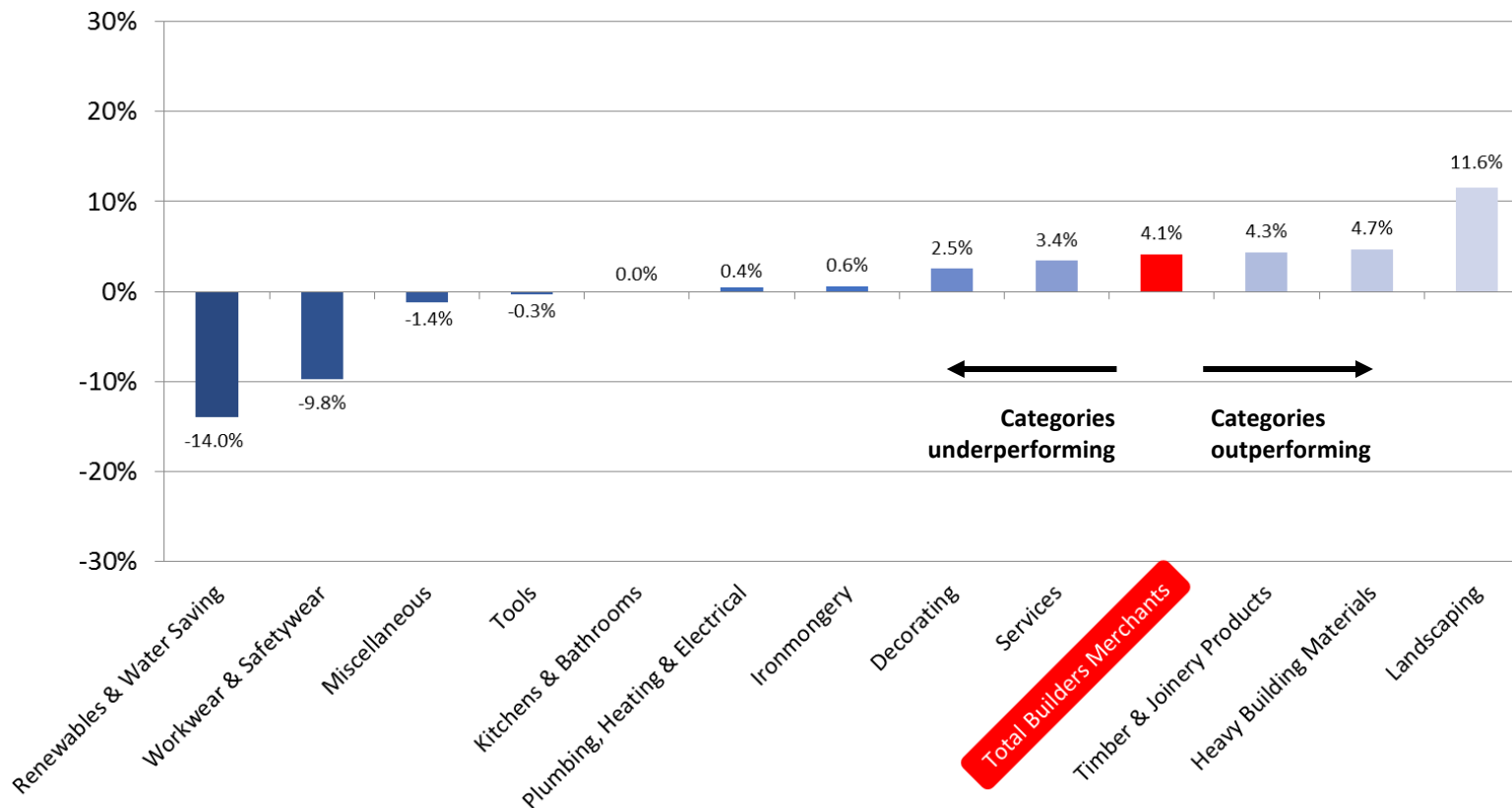
Index Months: 20.8 23 20 22 22 21 17 20 21 21 20 22 21 22 22 21 22 17 21 20 23 18 21 22 21 22 21 22 21 16 22 20 21 20 21 22 22 20 22 22 16 22 20

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

# Monthly: This Year v Last Year

## February 2019 sales indices

### February 2019 index v February 2018 index



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

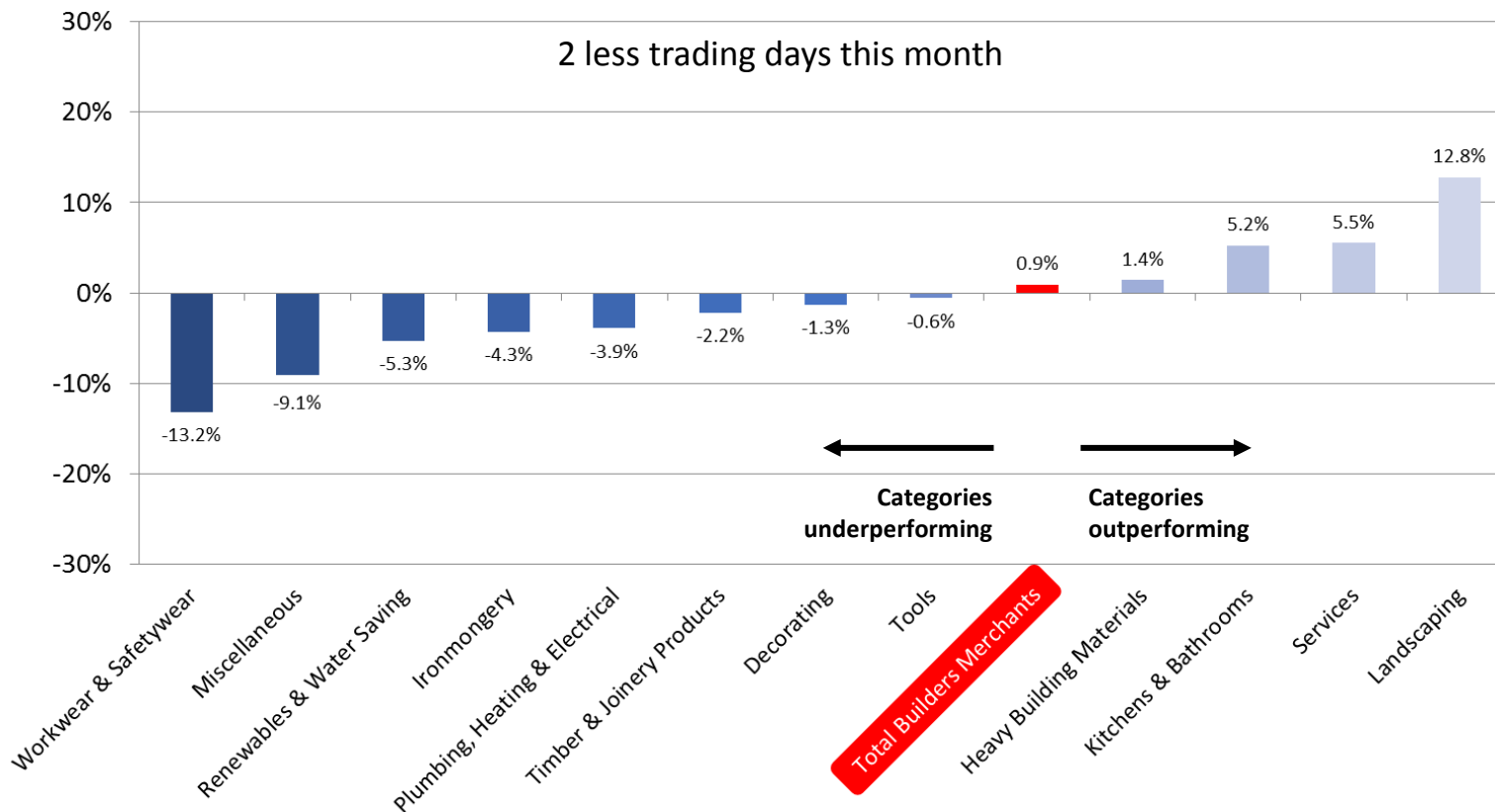
# Monthly: This Month v Last Month

## February 2019 sales indices



### February 2019 index v January 2019 index

2 less trading days this month

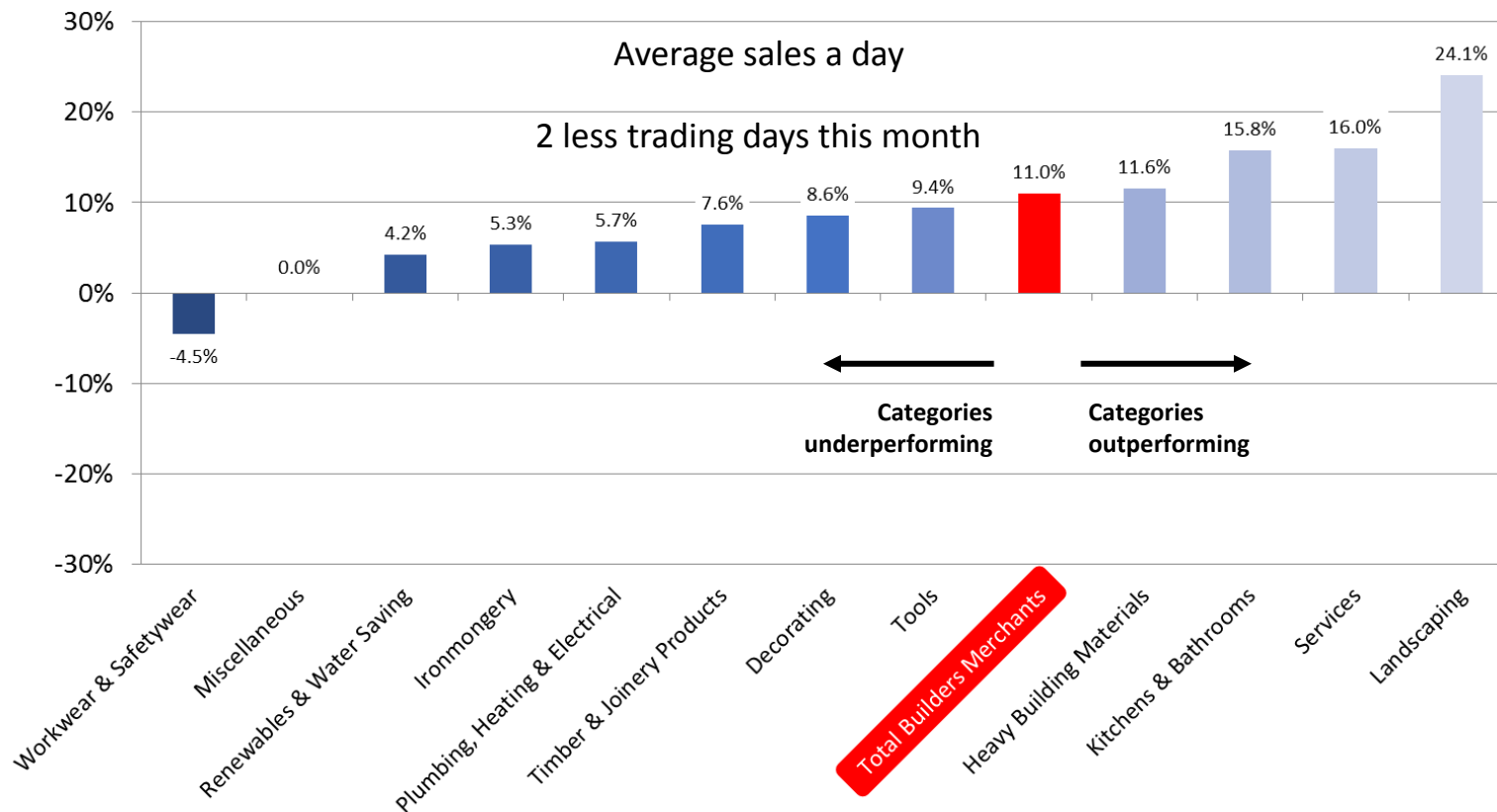


Source: GfK's Builders Merchants Total Category Report July 2015 to February 2019

# Monthly: This Month v Last Month

## February 2019 average sales a day indices

### February 2019 index v January 2019 index



 Source: GfK's Builders Merchants Total Category Report July 2015 to February 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
<b>Total Builders Merchants</b>	<b>100</b>	<b>107.2</b>	<b>106.4</b>	<b>124.4</b>	<b>124.0</b>	<b>110.6</b>
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.

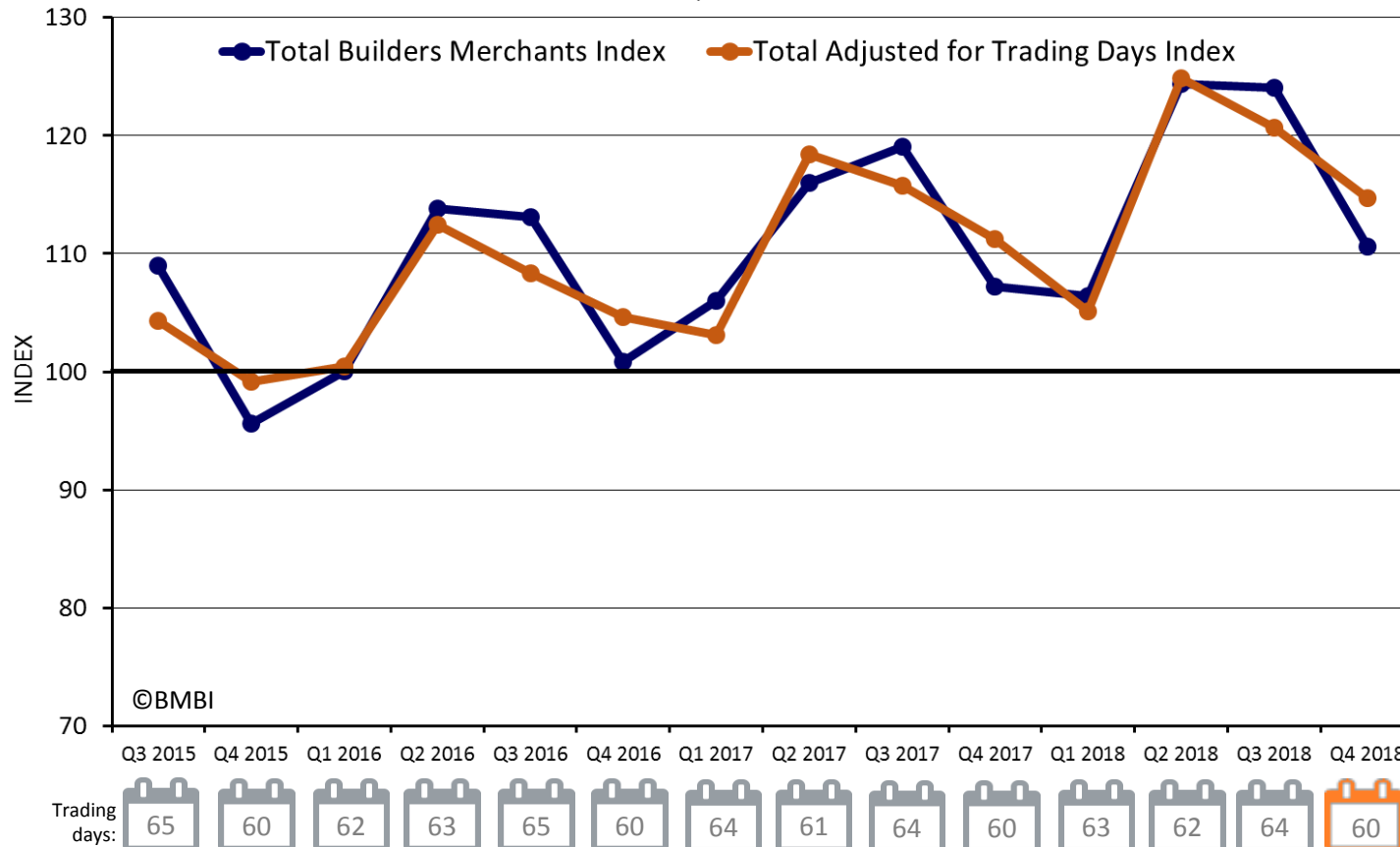
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2018

# 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



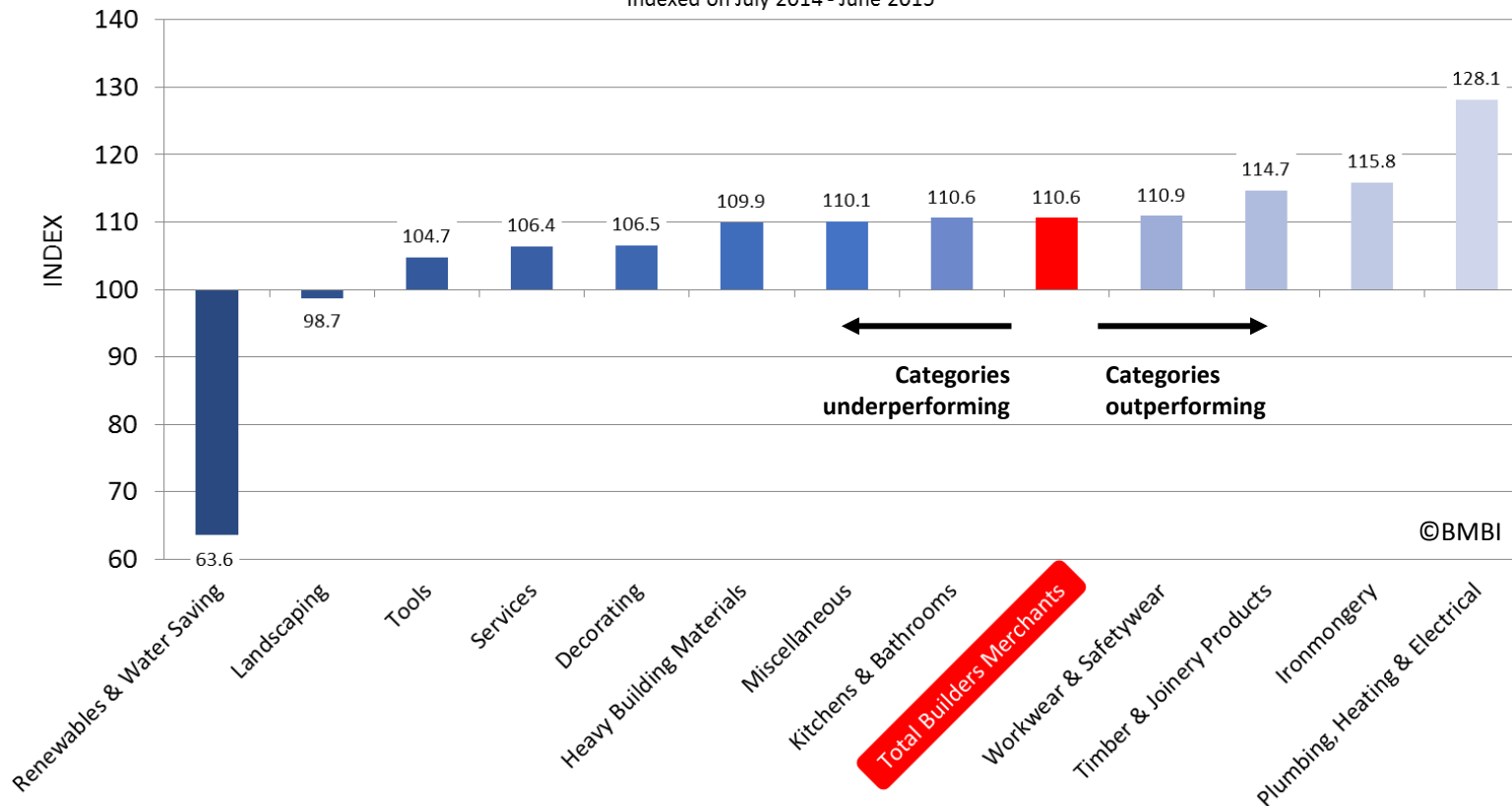
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2018

# 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

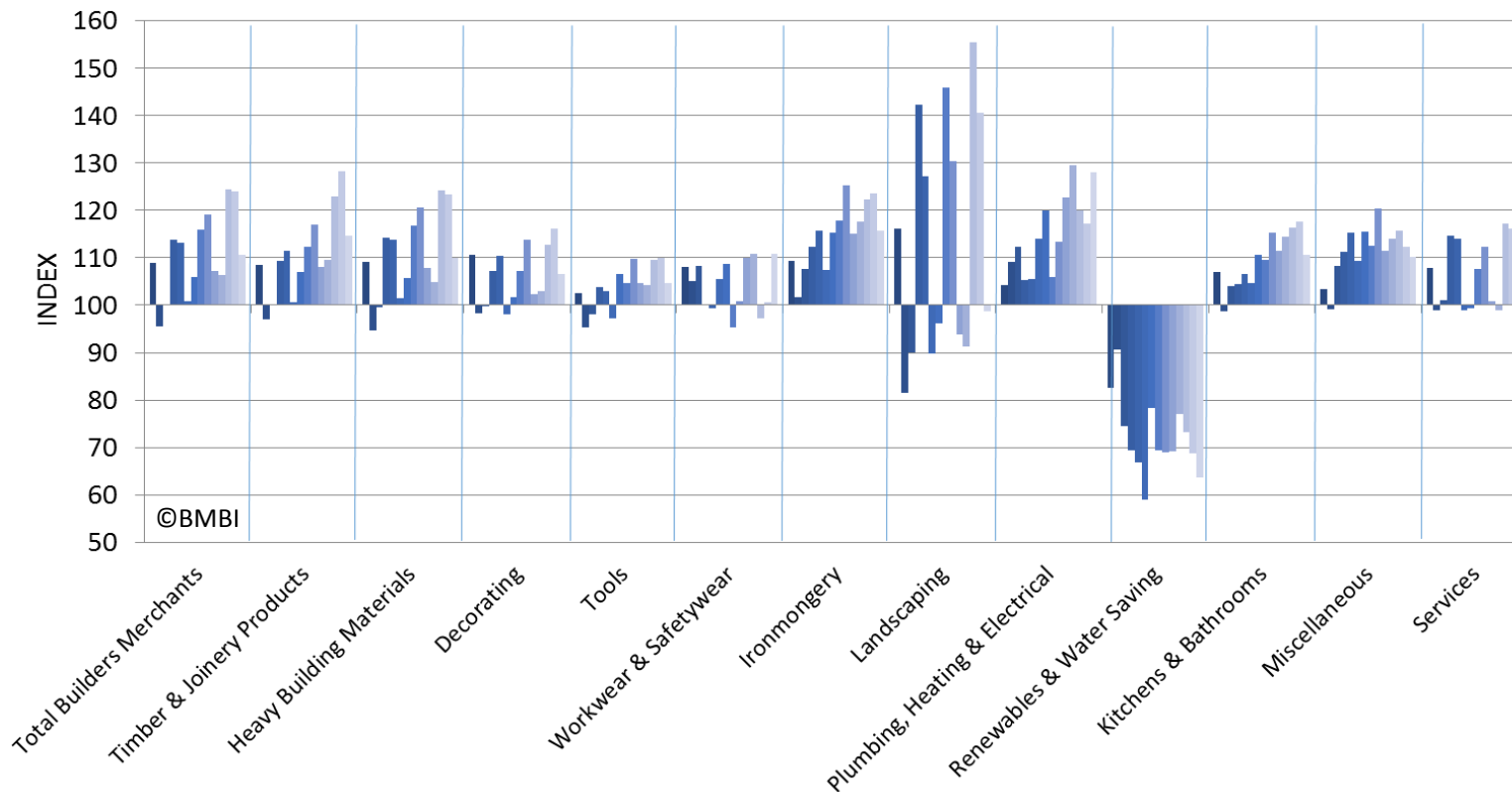
# Quarterly: Index and Categories

## 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)

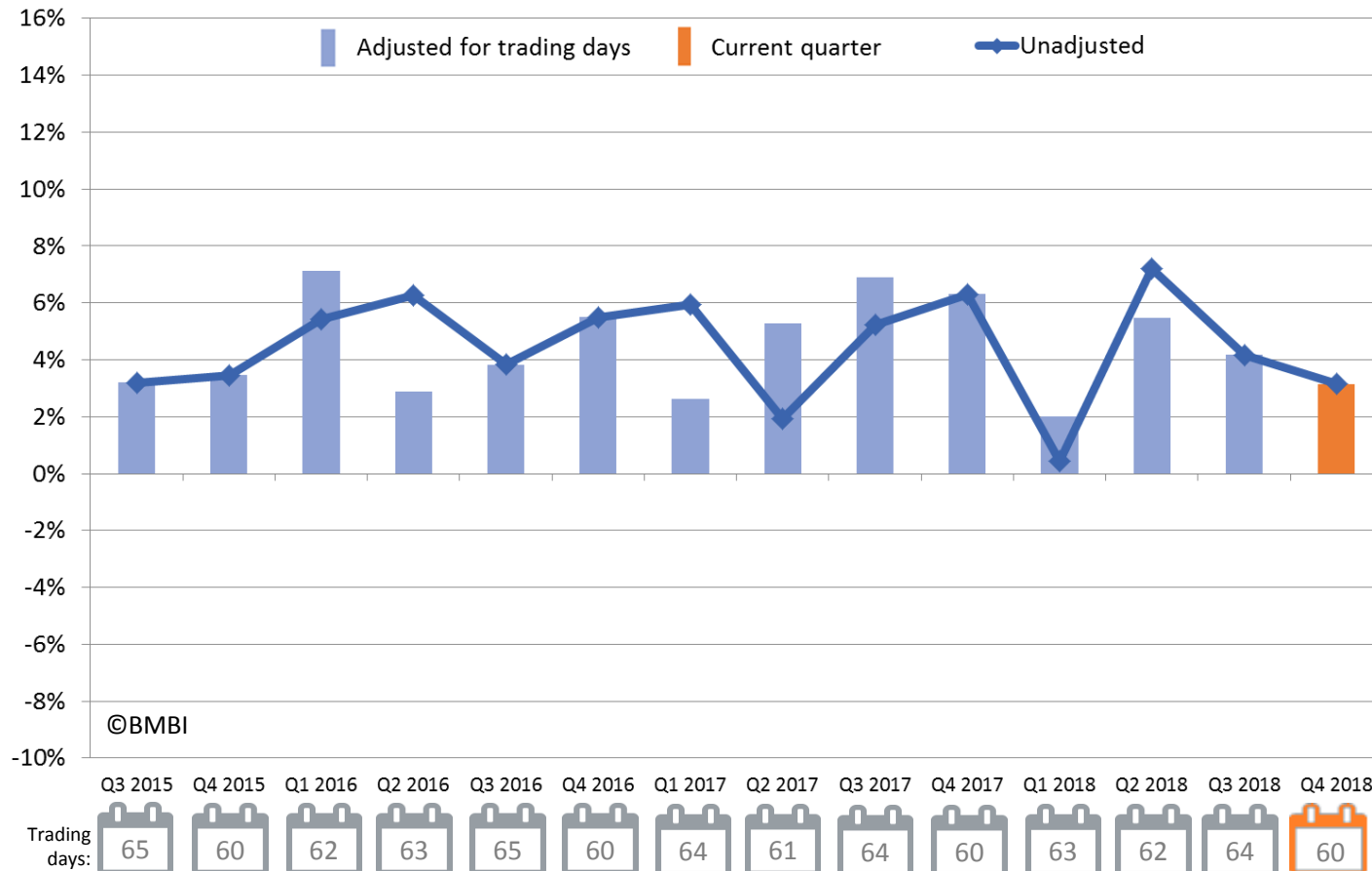


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2018

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

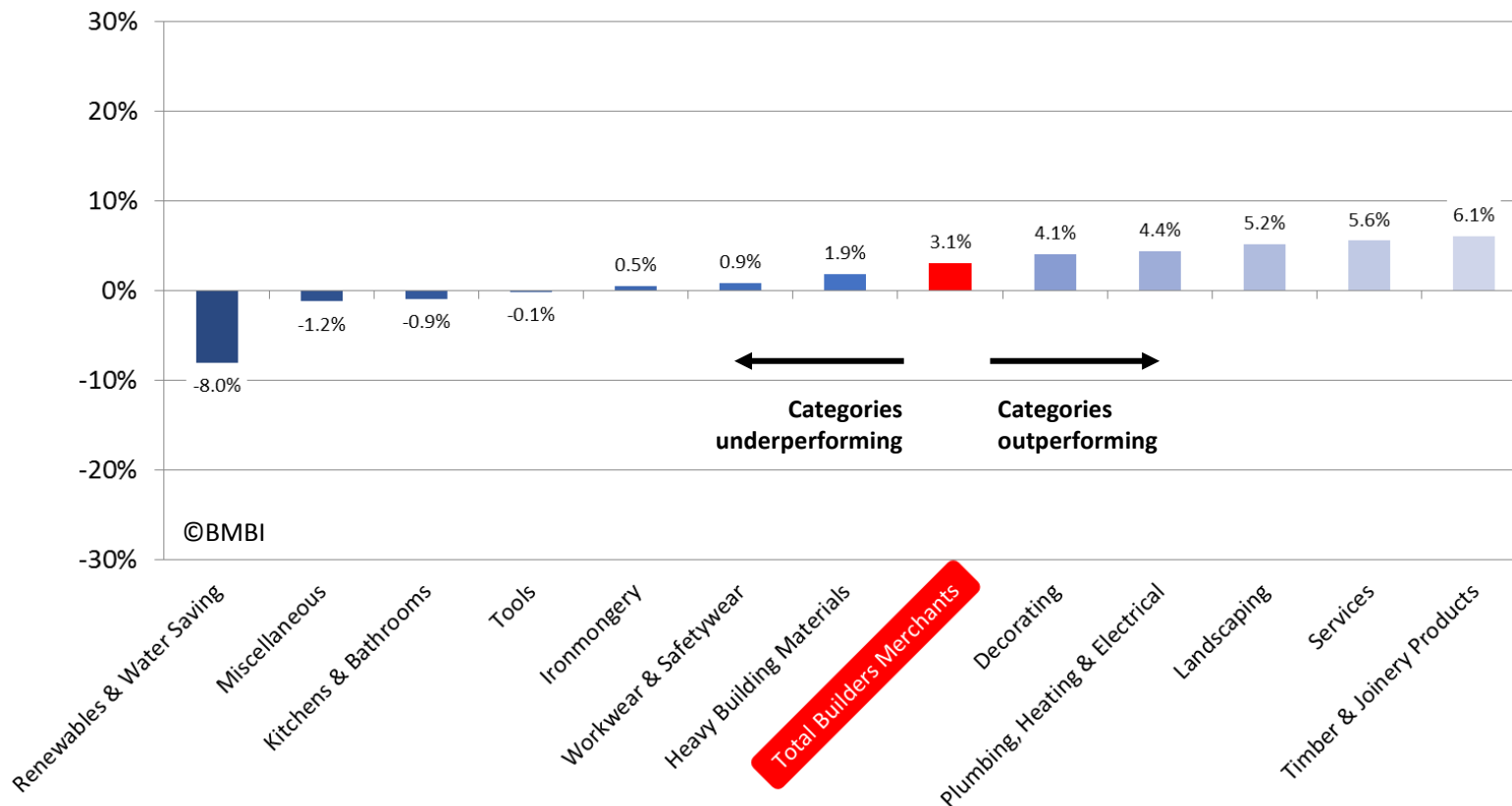


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2018

# Quarterly: This Year v Last Year

## Q4 2018 sales indices

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

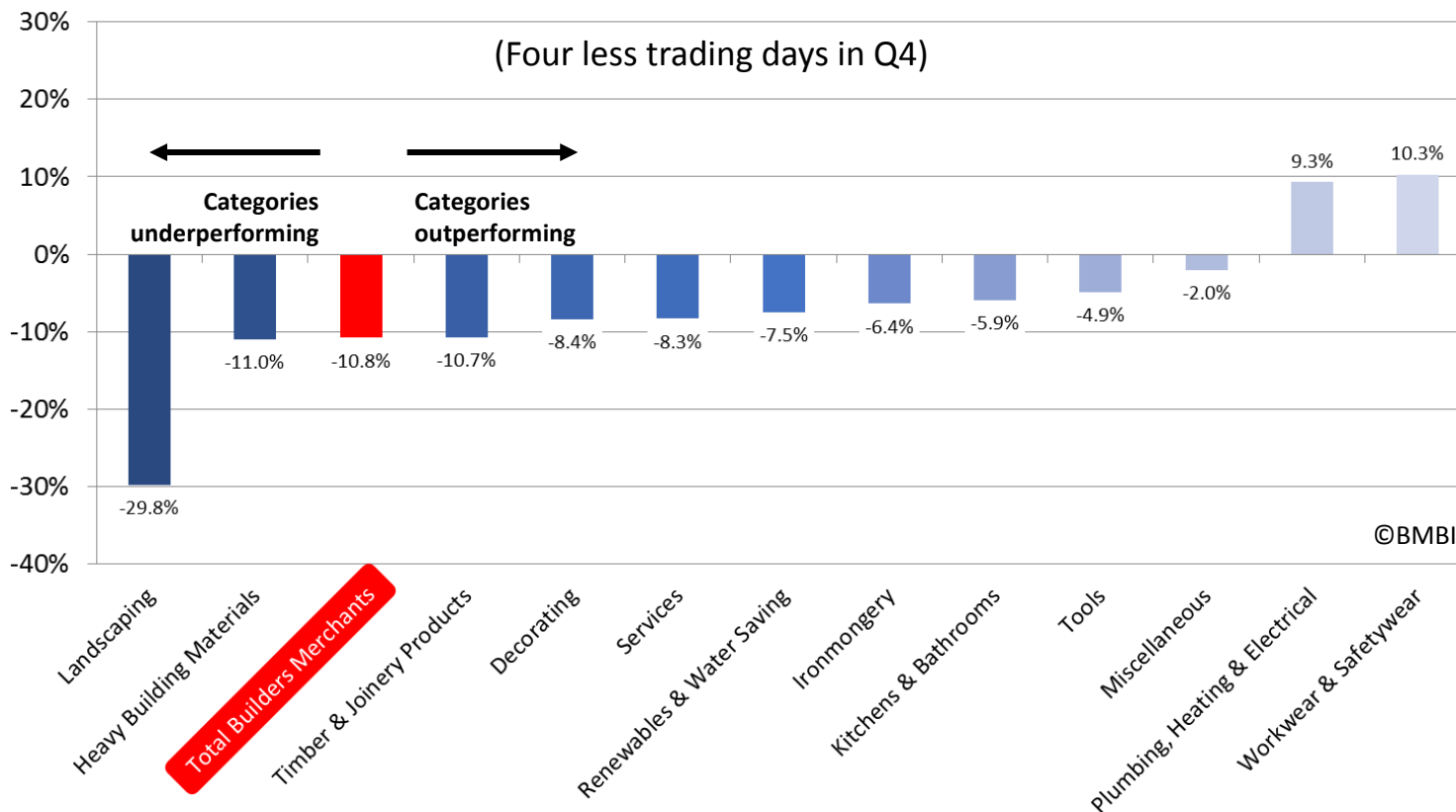


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2018

# Quarterly: Quarter on Quarter

## Q4 2018 sales indices

### Quarter 4 2018 index v Quarter 3 2018 index



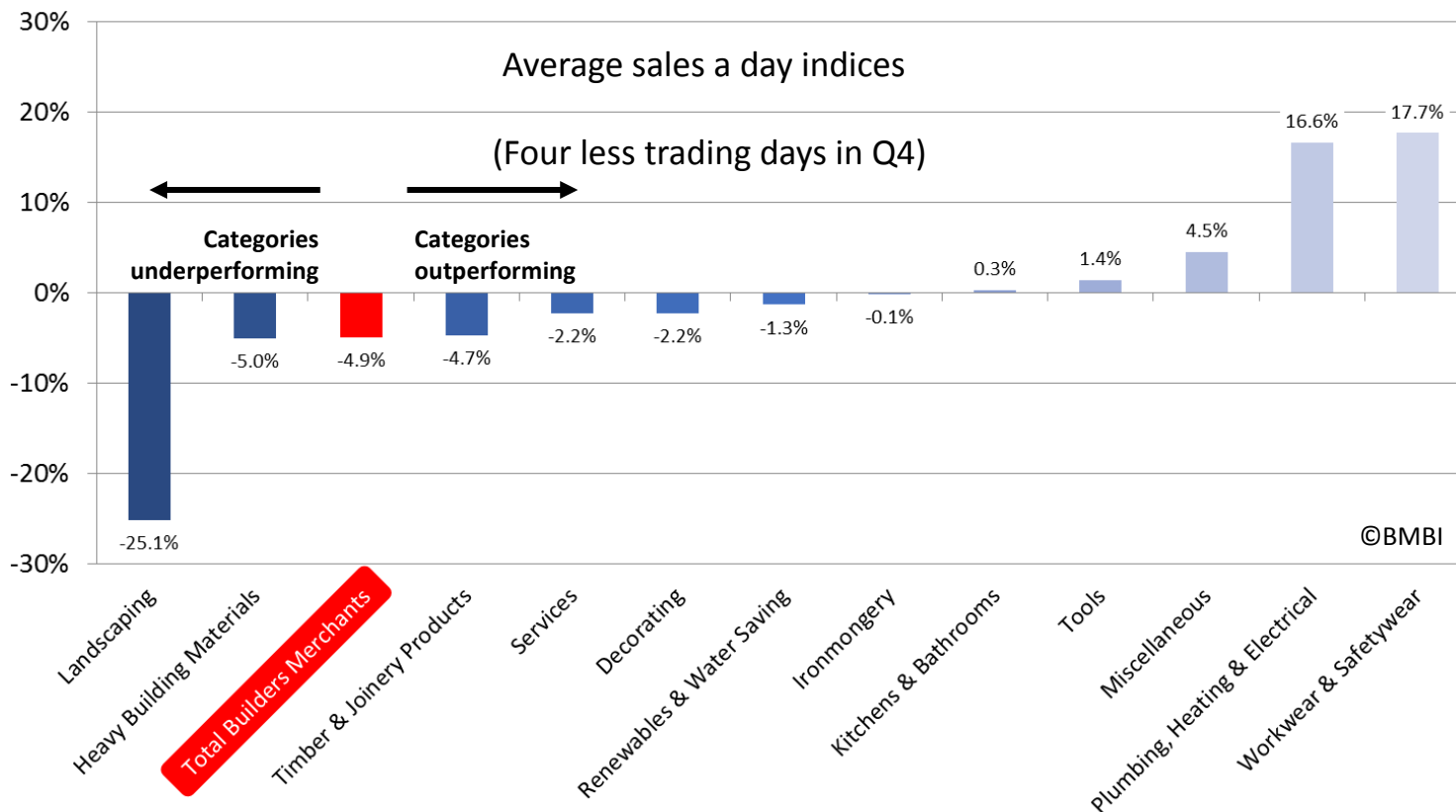
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2018



# Quarterly: Quarter on Quarter

## Q4 2018 average sales a day indices

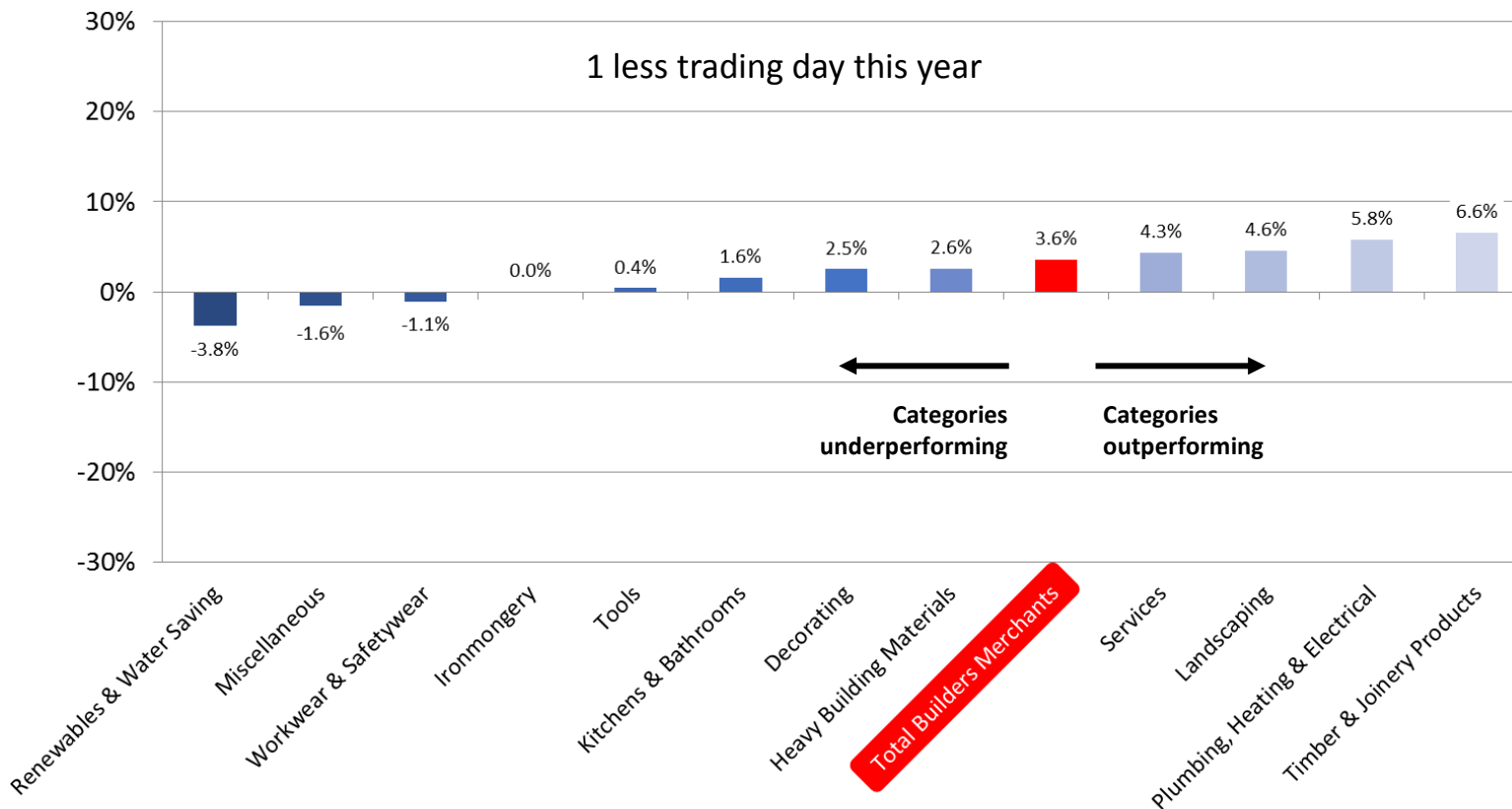
### Quarter 4 2018 Index v Quarter 3 2018 Index



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

# Last 12 Months: Year on Year

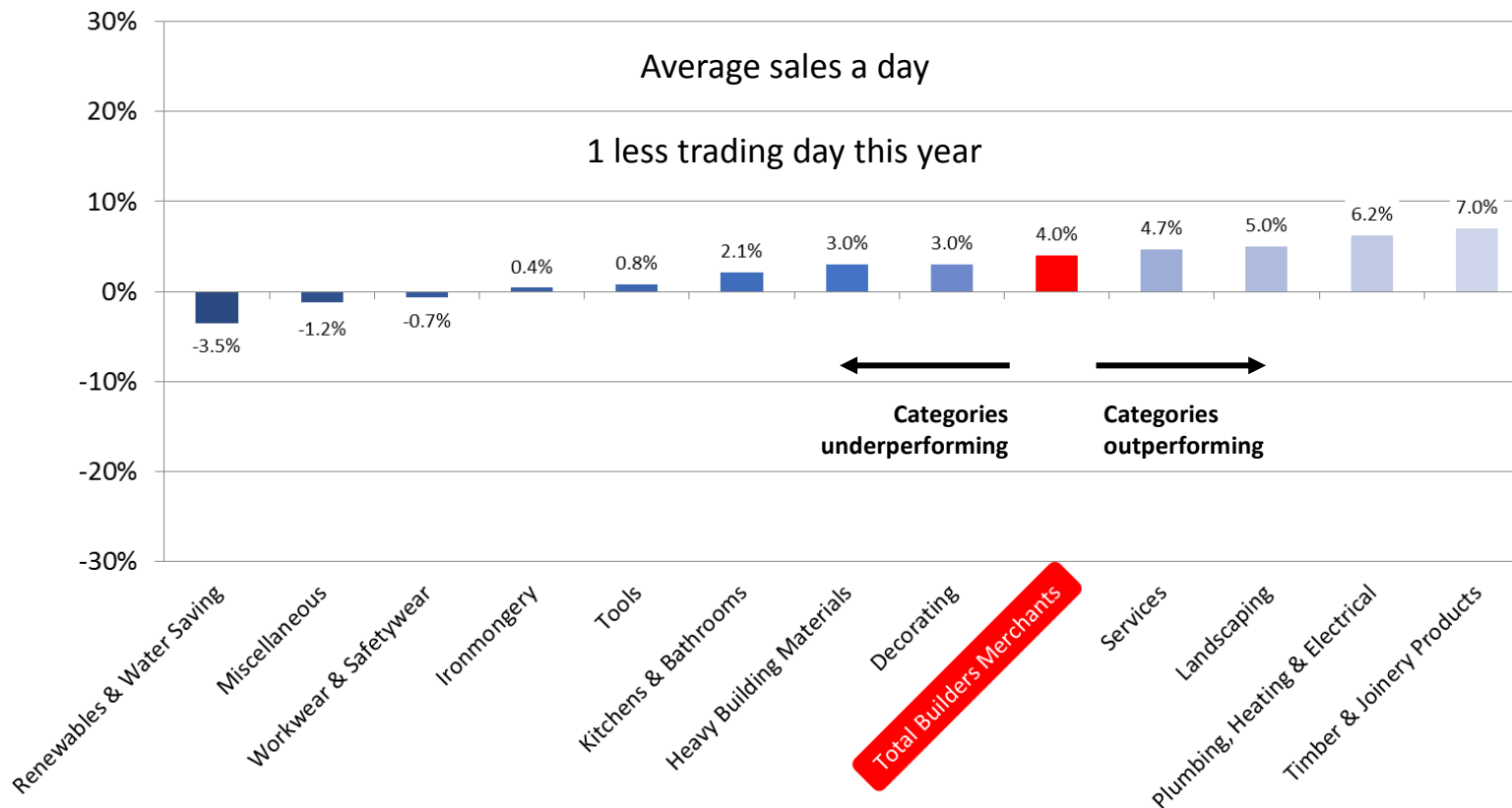
## 12 months Mar 18 to Feb 19 v 12 months Mar 17 to Feb 18



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

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

## 12 months Mar 18 to Feb 19 v 12 months Mar 17 to Feb 18

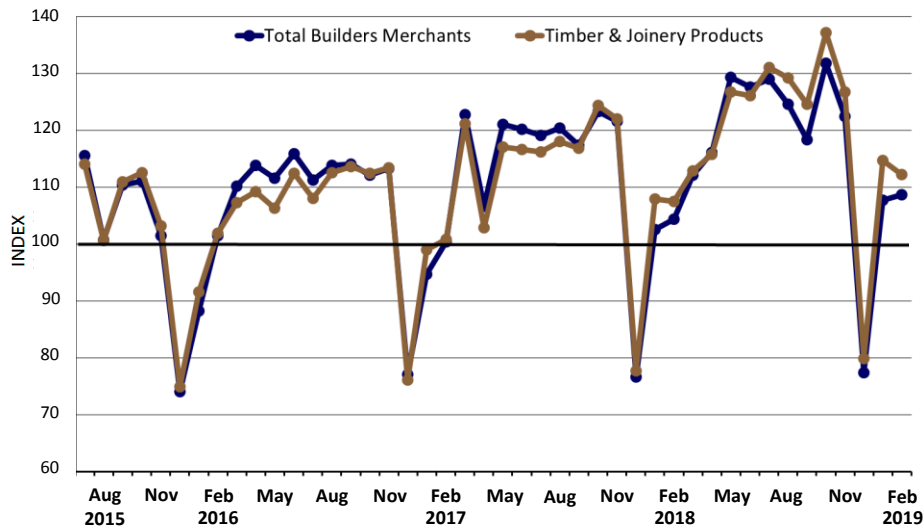


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2019

# Monthly: Indices

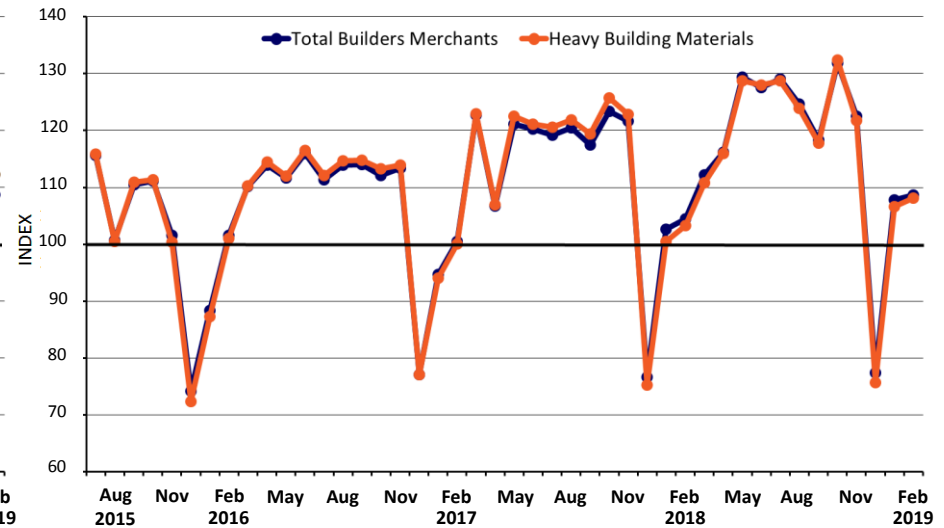
## February 2019

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



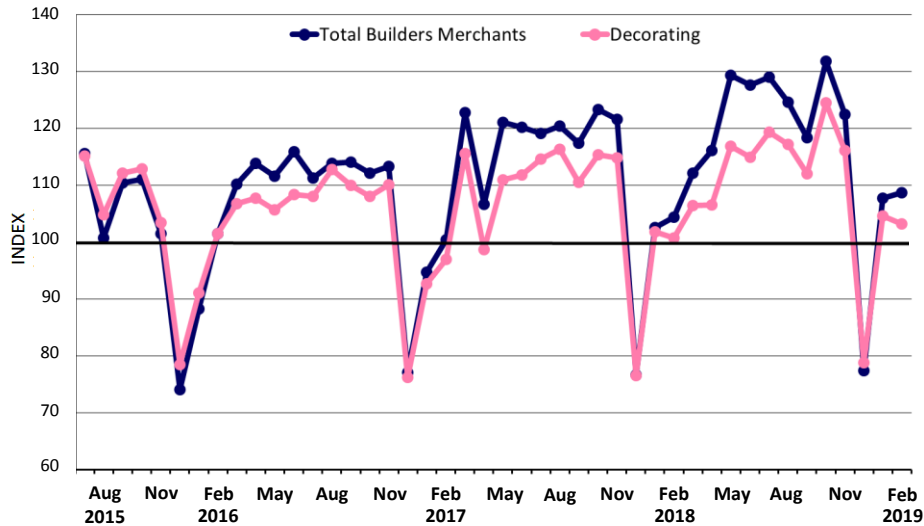
Indexed on July 2014 – June 2015

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

# Monthly: Indices

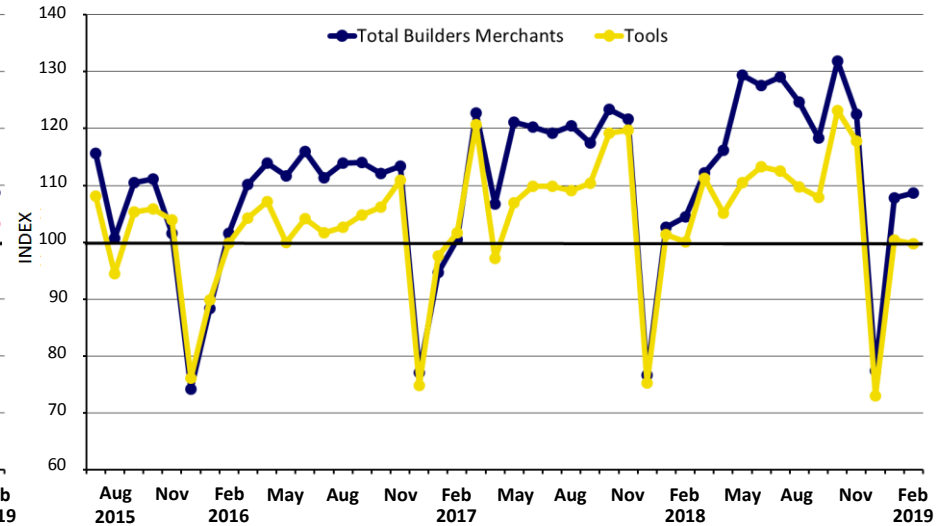
## February 2019

### Decorating



Indexed on July 2014 – June 2015

### Tools

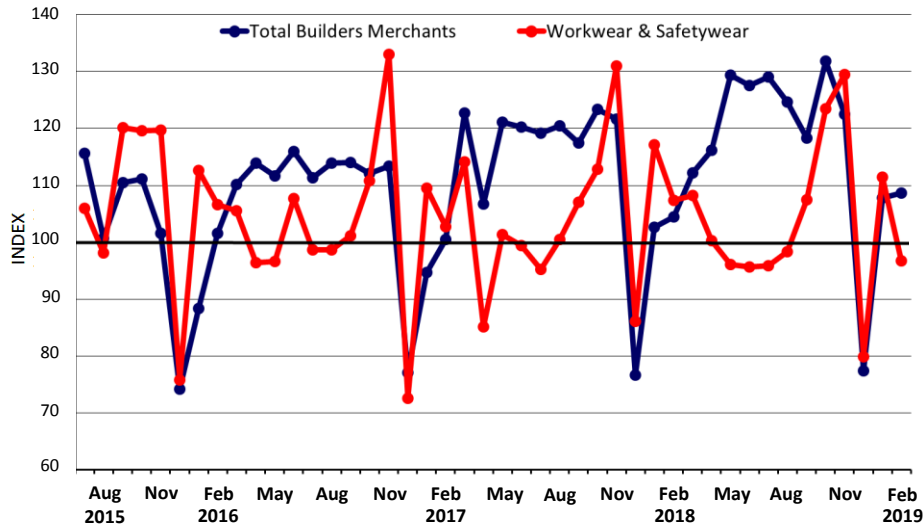


Indexed on July 2014 – June 2015

# Monthly: Indices

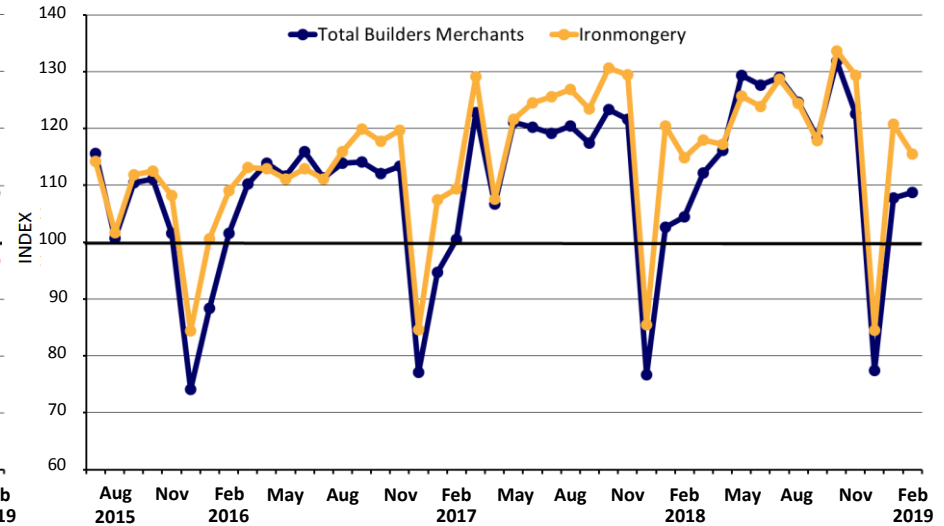
## February 2019

### Workwear & Safetywear



Indexed on July 2014 – June 2015

### Ironmongery



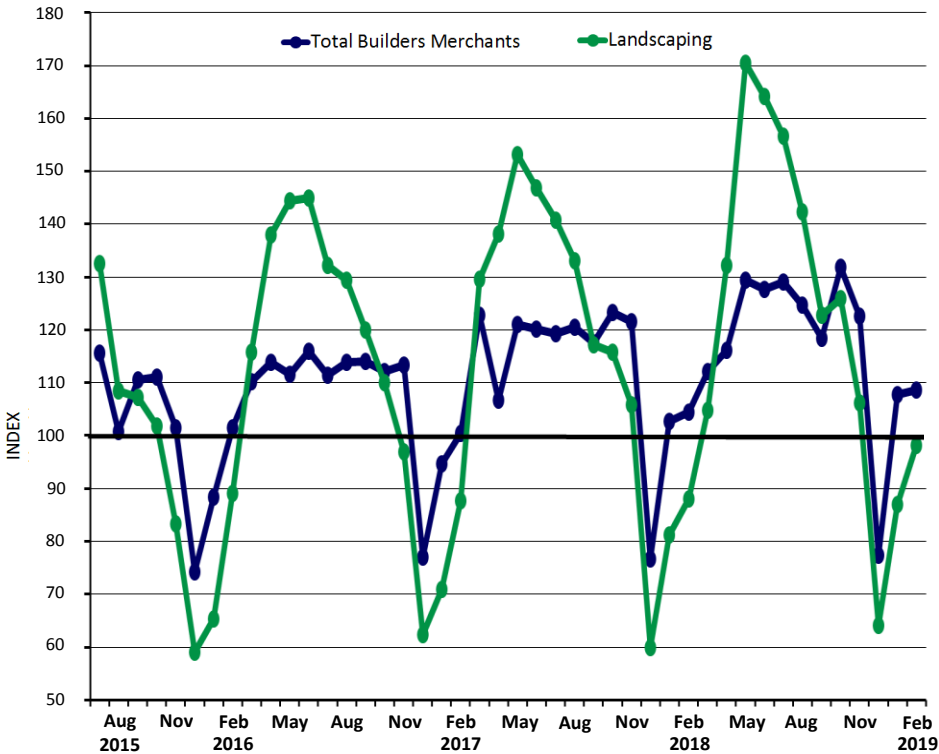
Indexed on July 2014 – June 2015

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

# Monthly: Indices

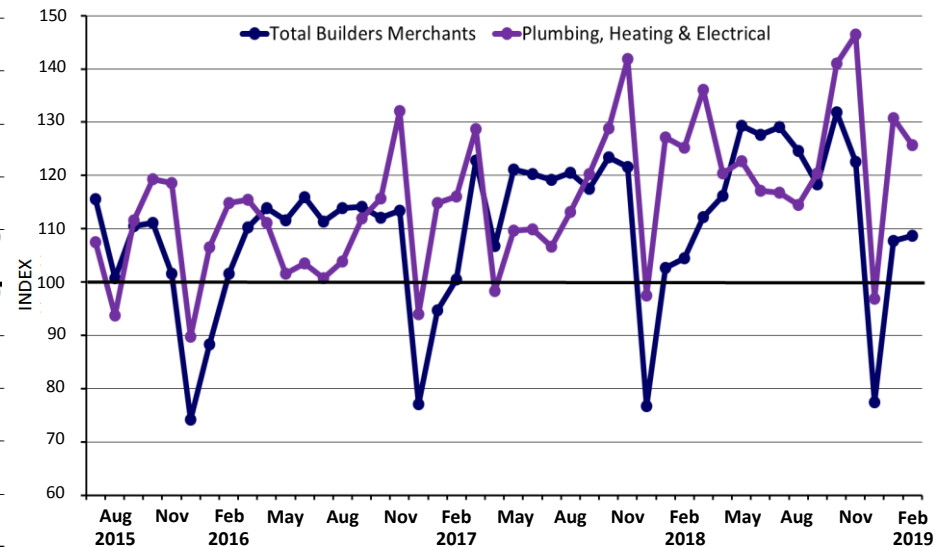
## February 2019

### Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

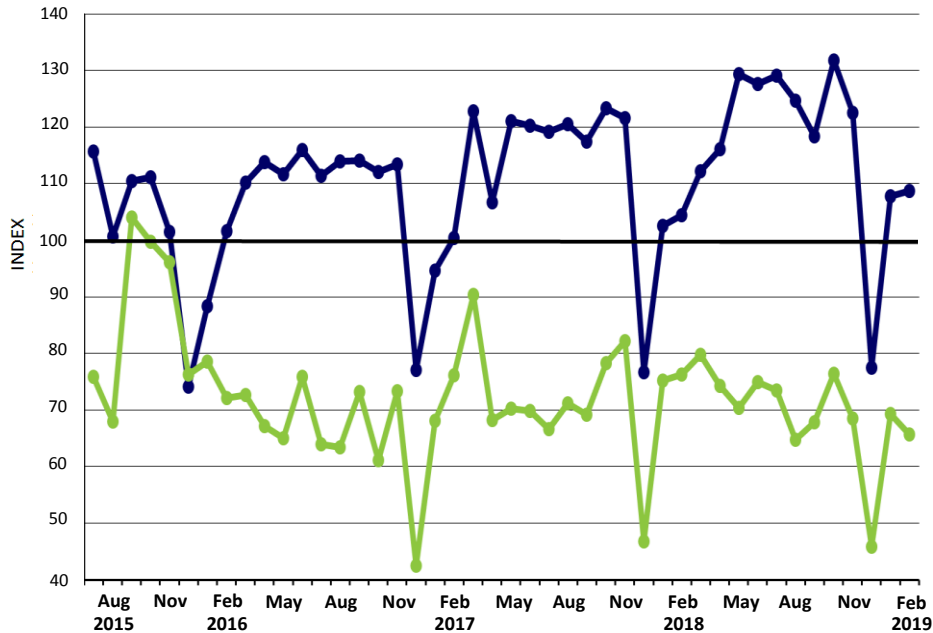


# Monthly: Indices

## February 2019

### Renewables & Water Saving

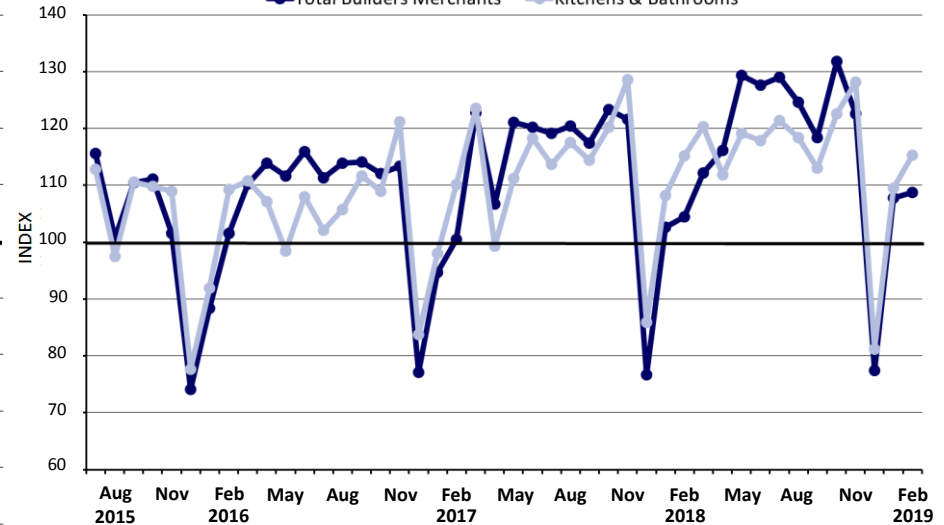
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms

● Total Builders Merchants ● Kitchens & Bathrooms

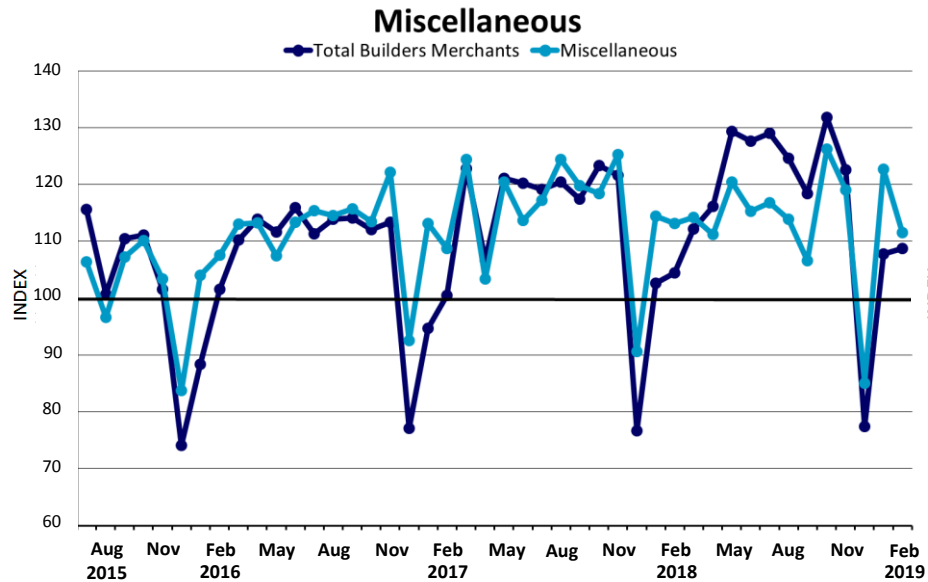


Indexed on July 2014 – June 2015

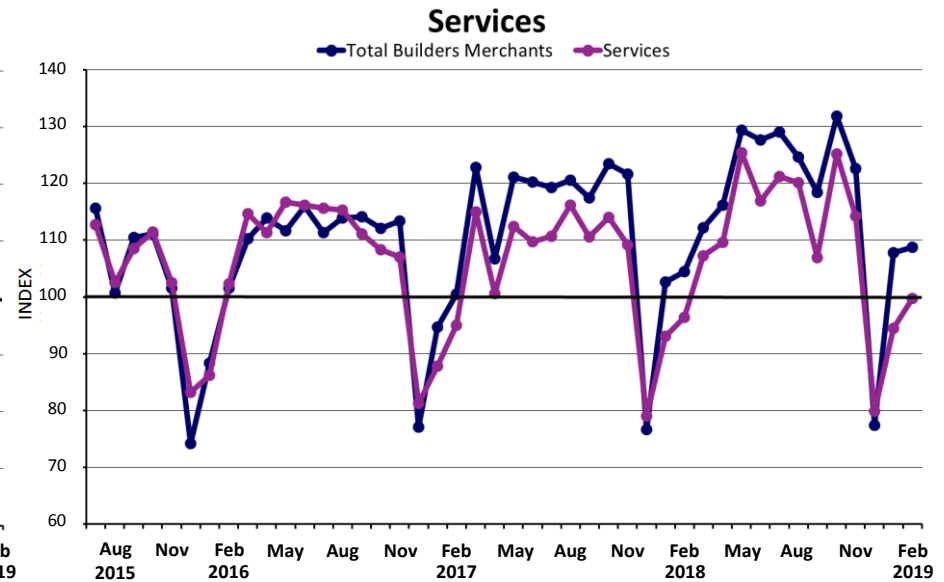
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2019

# Monthly: Indices

## February 2019



Indexed on July 2014 – June 2015



Indexed on July 2014 – June 2015

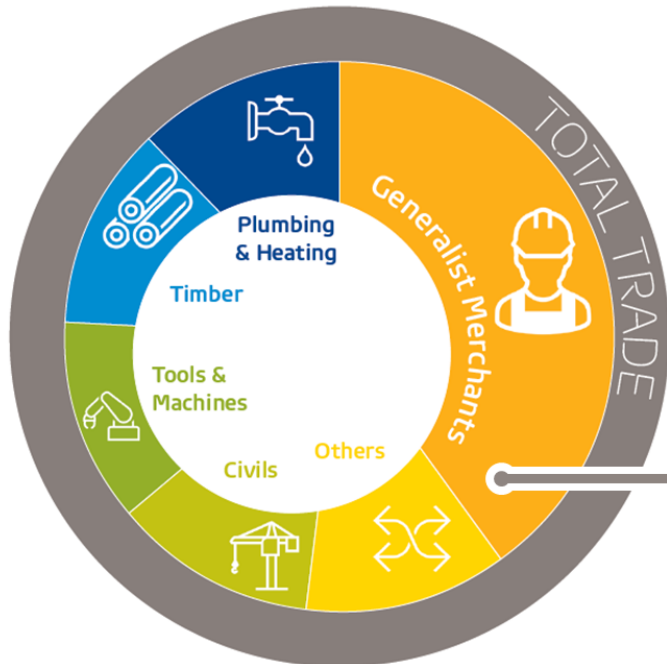
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2019

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

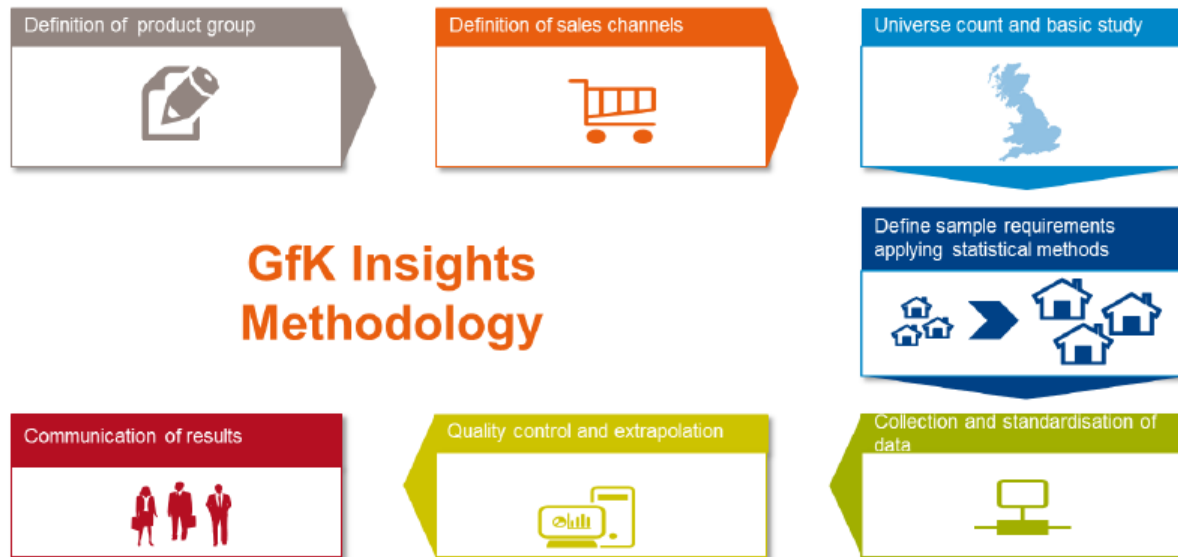
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

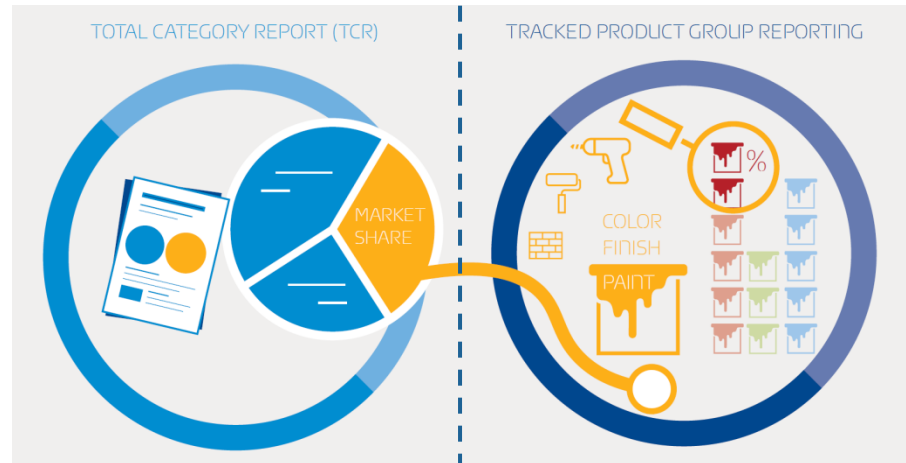
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

Cleaning/Domestic/Personal  
Automotive  
Glass  
Other Furniture & Shelving  
Other Misc

### Services

Toolhire / Hire Services  
Other Services



## 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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