

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for May 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 Q1 report.

The collage features several reports:

- Monthly and Quarterly Indices March 2019 and Q1 2019:** Includes line and bar charts for Timber & Joinery Products.
- GfK's Product Categories:** Reports cover category headline values & in-depth, level insights.
- Macro factors impacting Merchants:** Includes a Consumer Confidence Index chart.
- Expert Panel Water Heating:** A report by HEATRAESADIA featuring Jeff House, Head of External Affairs. It discusses market trends in the water heating sector, including the impact of the EU Ecodesign Directive and the Energy Label on boiler sales, and the effect of the 2018 Energy Label on hot water cylinder sales.

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 there is 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. BMBI data is listed by the Department for Business, Energy & Industrial Strategy as one of the data sources for their monthly construction update, alongside the ONS, CPA, OECD, the Bank of England and others.

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 e.g. 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

Merchants' sales up 6% in May compared to April 2019 - but flat year on year

Year on year

Total Builders Merchants value sales in May 2019 were flat (+0.0%) compared with the same period in 2018. Following strong growth in the period February to April, sales were somewhat disappointing in May – in particular for Landscaping, which had seen three months of double-digit growth, but a sales increase of only 0.4% in May compared to last year. Both Timber & Joinery Products (+0.9%) and Heavy Building Materials (+0.3%) saw sales increase only marginally. The strongest category was Workwear & Safetywear, in which sales had increased by 4.2%.

Many sectors, including Tools (-5.4%), Decorating (-1.9%), Plumbing, Heating & Electrical (-2.0%) and Kitchens & Bathrooms (-2.3%) reported lower sales in May 2019 compared to last year.

This more subdued performance was echoed in ONS construction output figures, and consumer confidence remains low. Total output in May 2019 had grown compared with last year, but RMI output was down by 1.8%, and the most significant drop was seen in private housing RMI (-6.8%) in the month.

Month on month

Total Builders Merchants sales were up 6.0% compared with the previous month. Sectors that performed well on a month-by-month unadjusted basis included Landscaping (up 10.7%), Heavy Building Materials (up 6.7%), Tools (up 5.0%) and Decorating (up 4.9%).

However, the adjusted May 2019 figures, which take into account the trading day difference, show that on a like for like basis, Total Builders Merchants' sales in May were just 1% higher than April and all categories except Landscaping and Heavy Building Materials had seen a fall in sales compared to April.

Index

May's BMBI index was 129.3, with Landscaping the highest category at 171.1 – it's highest index ever - but all other sectors were positioned below the Total Builders Merchants index.

Total merchant sales in May were flat compared to May 2018. Workwear & Safetywear was the strongest sector with growth of 4.2%.

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 Q1 2019 report, which includes commentary from our experts is available [here](#)

Meet the Builders Merchant Building Index Experts:



Kevin Morgan
Group Commercial Director
The Crystal Group



Expert for PVC-U Windows & Doors

[Read latest Comment: Q1 2019 Report](#)



John Coe
Commercial Director
Alumasc Water Management Systems



Expert for Civils, Metal Rainwater & Drainage

[Read latest Comment: Q1 2019 Report](#)



John Duffin
Managing Director
Keylite Roof Windows



Expert for Roof Windows

[Read latest Comment: Q1 2019 Report](#)



Andrew Simpson
National Commercial Director
Hanson Cement



Expert for Cement & Aggregates

[Read latest Comment: Q1 2019 Report](#)



Nigel Cox
Managing Director
Timbmet



Expert for Timber & Panel Products

[Read latest Comment: Q1 2019 Report](#)



Paul Owen
Commercial Director Distribution
IKO PLC



Expert for Roofing Products

[Read latest Comment: Q1 2019 Report](#)

The Expert Panel

Speaking for their markets - 2



Derrick McFarland
Managing Director
Keystone Lintels

Expert for Steel Lintels



[Read latest Comment: Q1 2019 Report](#)



Tony France
Sales Director
Ibstock

Expert for Bricks



[Read latest Comment: Q1 2019 Report](#)



Neil Hargreaves
Managing Director
Knauf Insulation

Expert for Mineral Wool Insulation



[Read latest Comment: Q1 2019 Report](#)



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

Expert for Water Heating



[Read latest Comment: Q1 2019 Report](#)



Mike Beard
Merchant Development
Director
Encon Insulation

**Expert for Insulation Products -
Distribution**



[Read latest Comment: Q1 2019 Report](#)



Malcolm Gough
Group Sales & Marketing
Director
Talasey Group

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



[Read latest Comment: Q1 2019 Report](#)



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

Expert for Paint



[Read latest Comment: Q1 2019 Report](#)



Mike Tattam
Sales & Marketing Director
Lakes

**Expert for Shower Enclosures and
Showering**



[Read latest Comment: Q1 2019 Report](#)

Monthly: Index and Categories

May 2018* – May 2019

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



MONTHLY SALES VALUE INDEX	Index	2018									2019			
		May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Total Builders Merchants	100	129.4	127.6	129.1	124.7	118.4	131.8	122.5	77.4	107.8	108.7	121.9	122.0	129.3
Timber & Joinery Products	100	126.7	126.2	131.1	129.3	124.7	137.2	126.8	79.9	114.7	112.2	123.3	122.3	127.9
Heavy Building Materials	100	128.7	128.0	128.8	123.9	117.8	132.4	121.8	75.6	106.6	108.1	121.2	121.1	129.2
Decorating	100	117.0	114.9	119.4	117.2	112.0	124.6	116.1	78.8	104.6	103.3	114.8	109.7	115.1
Tools	100	110.5	113.3	112.5	109.7	108.0	123.2	117.8	73.0	100.3	99.8	108.8	99.5	104.5
Workwear & Safetywear	100	96.0	95.7	95.9	98.3	107.5	123.5	129.5	79.9	111.5	96.8	101.5	95.5	100.1
Ironmongery	100	125.7	123.9	128.8	124.4	117.9	133.6	129.3	84.5	120.8	115.5	125.2	122.5	127.6
Landscaping	100	170.4	164.1	156.6	142.4	122.8	126.0	106.1	64.0	87.1	98.2	131.6	154.5	171.1
Plumbing, Heating & Electrical	100	122.7	117.1	116.8	114.5	120.4	141.1	146.5	96.9	130.8	125.7	131.2	117.6	120.2
Renewables & Water Saving	100	70.4	75.0	73.5	64.8	67.8	76.4	68.5	45.8	69.3	65.7	78.5	64.5	61.4
Kitchens & Bathrooms	100	119.2	117.8	121.4	118.4	113.0	122.5	128.2	81.2	109.5	115.3	122.8	115.2	116.5
Miscellaneous	100	120.5	115.3	116.8	113.9	106.6	126.3	119.1	85.1	122.7	111.6	115.1	113.6	122.5
Services	100	125.4	116.9	121.1	120.1	106.9	125.1	114.2	79.9	94.5	99.7	110.0	113.6	121.8

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

NB: The April 2019 index for services has been updated following a data submission revision.

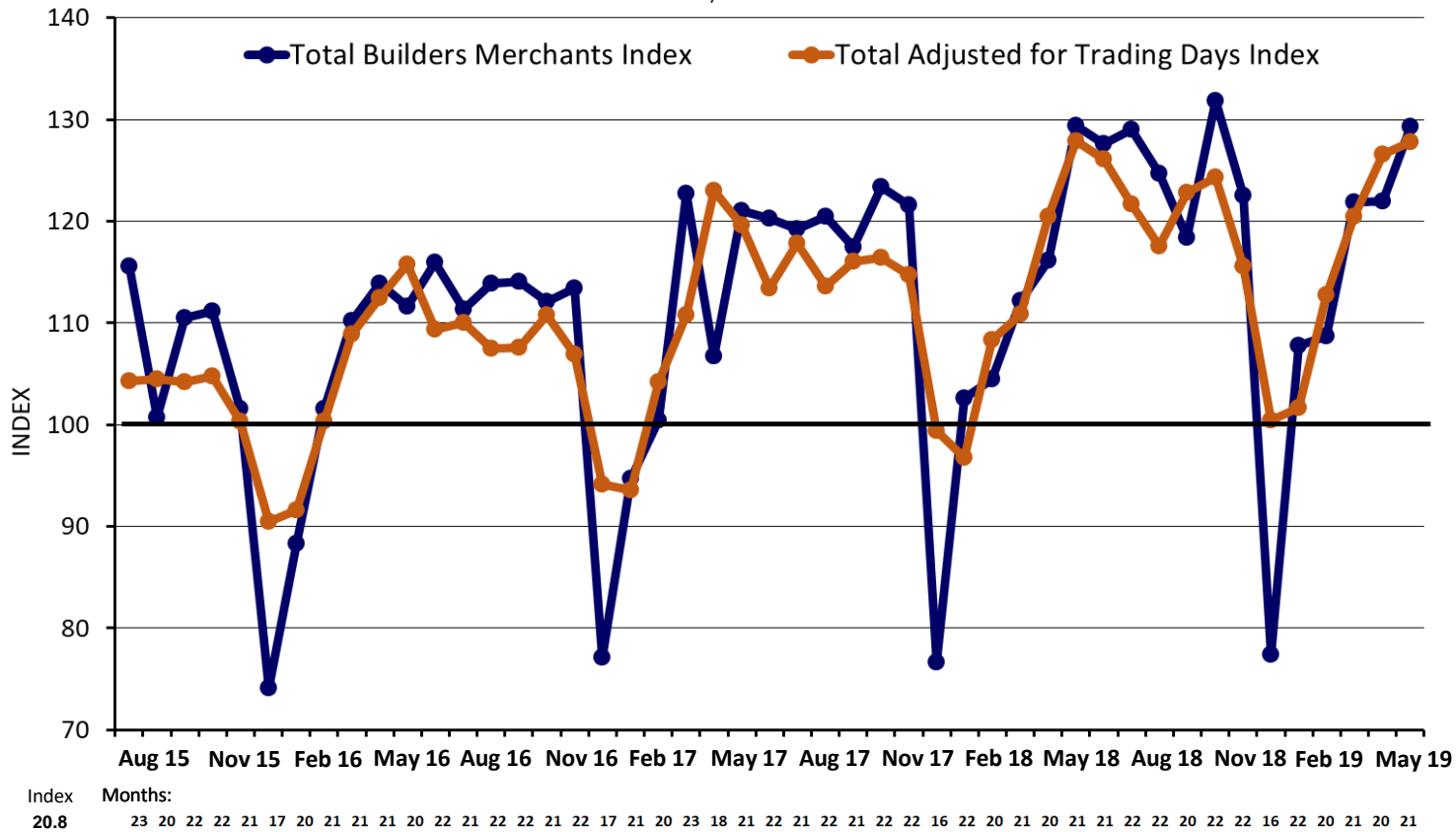
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

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



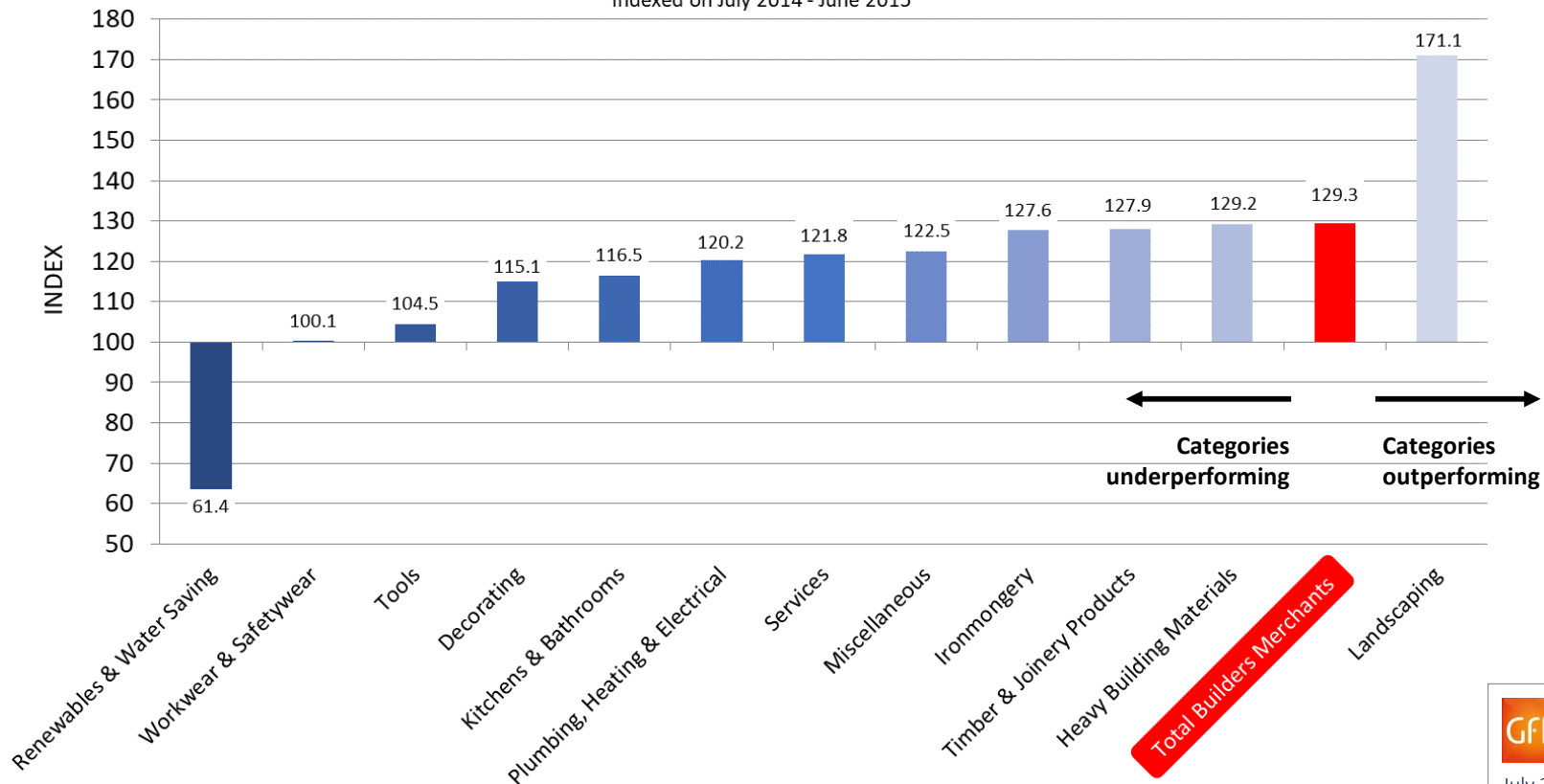
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

Monthly: Index and Categories

May 2019 index

May 2019 Index

Indexed on July 2014 - June 2015

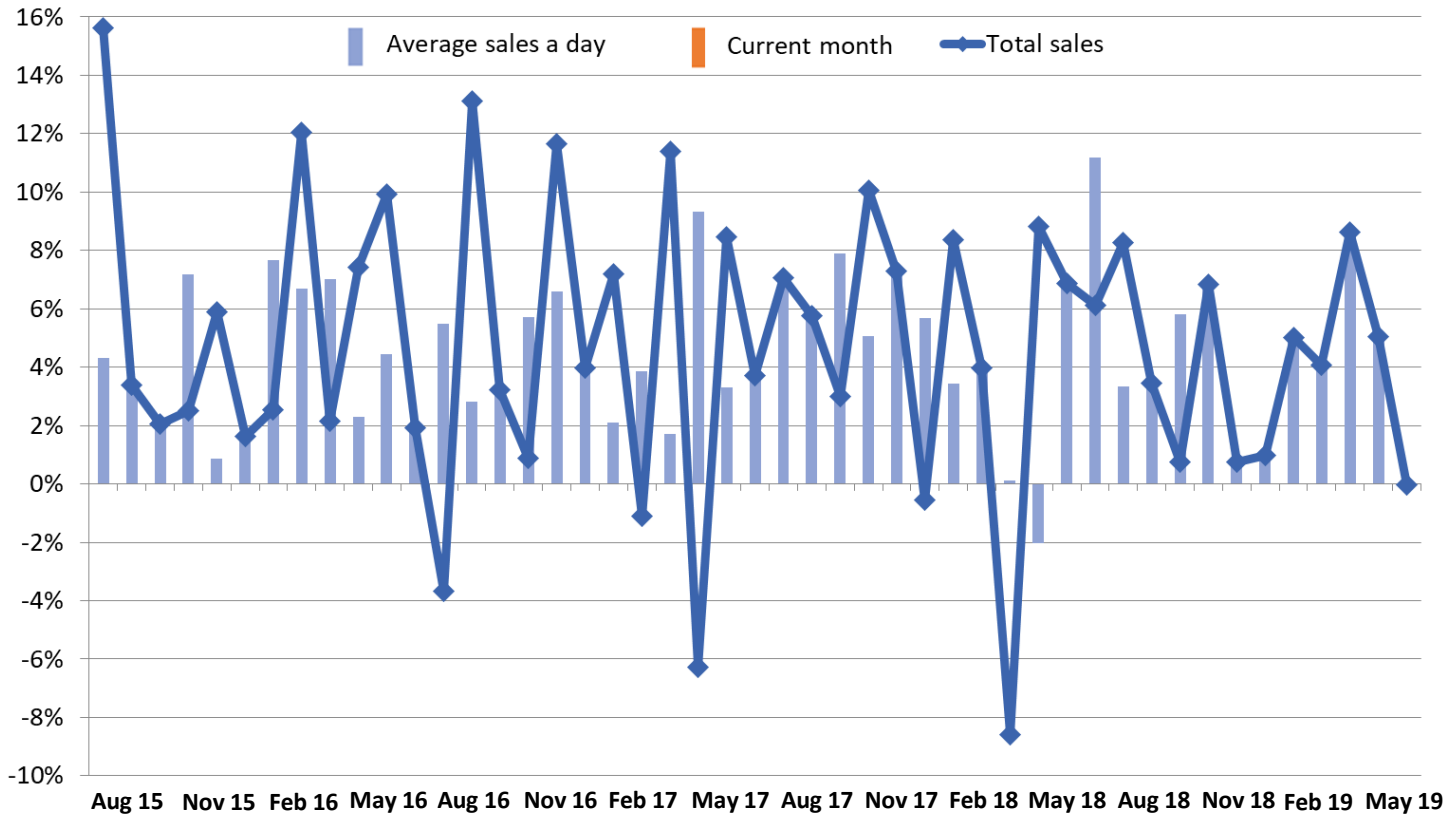


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

Monthly: Sales Indices

Adjusted and unadjusted for trading days

Monthly: Year on Year



Trading days:

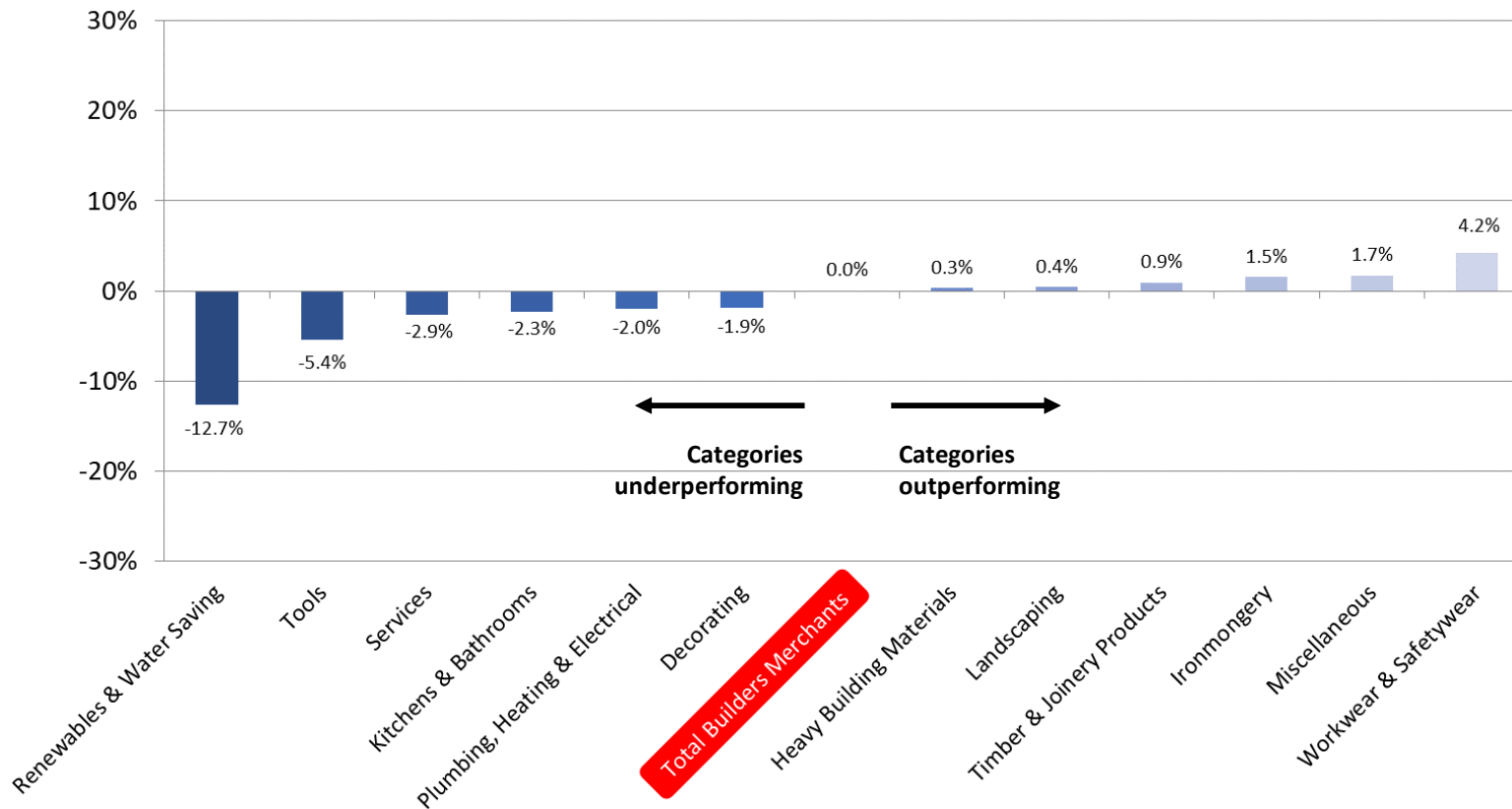
Index Months: 20.8 23 20 22 22 21 17 20 21 21 21 20 22 21 22 22 21 22 17 21 20 23 18 21 22 21 22 22 16 22 20 21 20 21

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

Monthly: This Year v Last Year

May 2019 sales indices

May 2019 index v May 2018 index



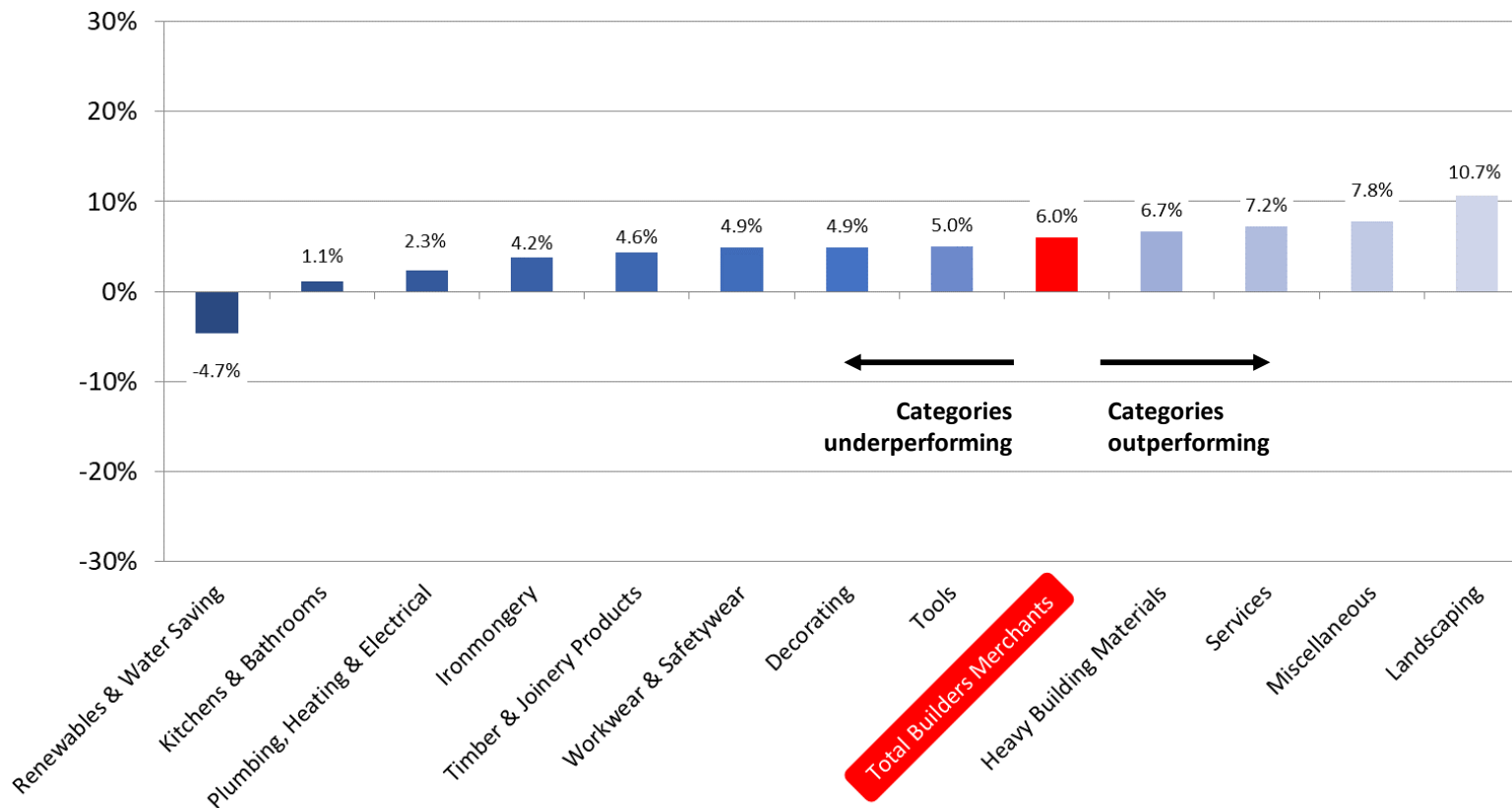
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

Monthly: This Month v Last Month

May 2019 sales indices



May 2019 index v April 2019 index




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

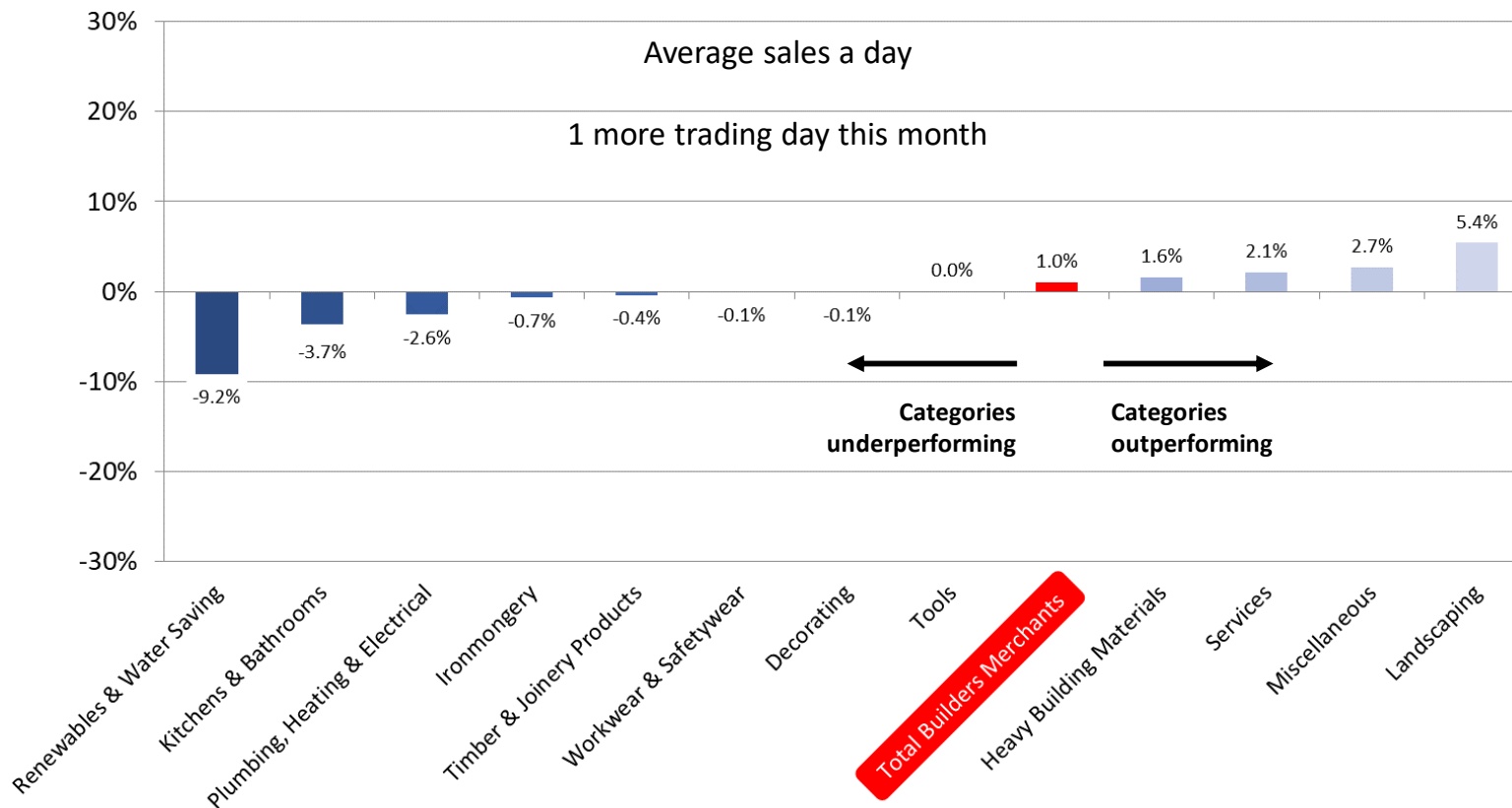
Monthly: This Month v Last Month

May 2019

average sales a day indices



May 2019 index v April 2019 index



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

Quarterly: Index and Categories


Quarter 1 2018* to Quarter 1 2019

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q1 2018	Q2 2018	Q3 2018	Q4 2018	Q1 2019
Total Builders Merchants	100	106.4	124.4	124.0	110.6	112.7
Timber & Joinery Products	100	109.5	122.9	128.3	114.7	116.7
Heavy Building Materials	100	104.9	124.2	123.5	109.9	112.0
Decorating	100	103.0	112.8	116.2	106.5	107.5
Tools	100	104.2	109.6	110.1	104.7	103.0
Workwear & Safetywear	100	110.9	97.3	100.6	110.9	103.2
Ironmongery	100	117.8	122.3	123.7	115.8	120.5
Landscaping	100	91.4	155.5	140.6	98.7	105.6
Plumbing, Heating & Electrical	100	129.5	120.1	117.2	128.1	129.2
Renewables & Water Saving	100	77.1	73.2	68.7	63.6	71.2
Kitchens & Bathrooms	100	114.6	116.3	117.6	110.6	115.9
Miscellaneous	100	113.9	115.7	112.4	110.1	116.5
Services	100	98.9	117.3	116.1	106.4	98.8

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

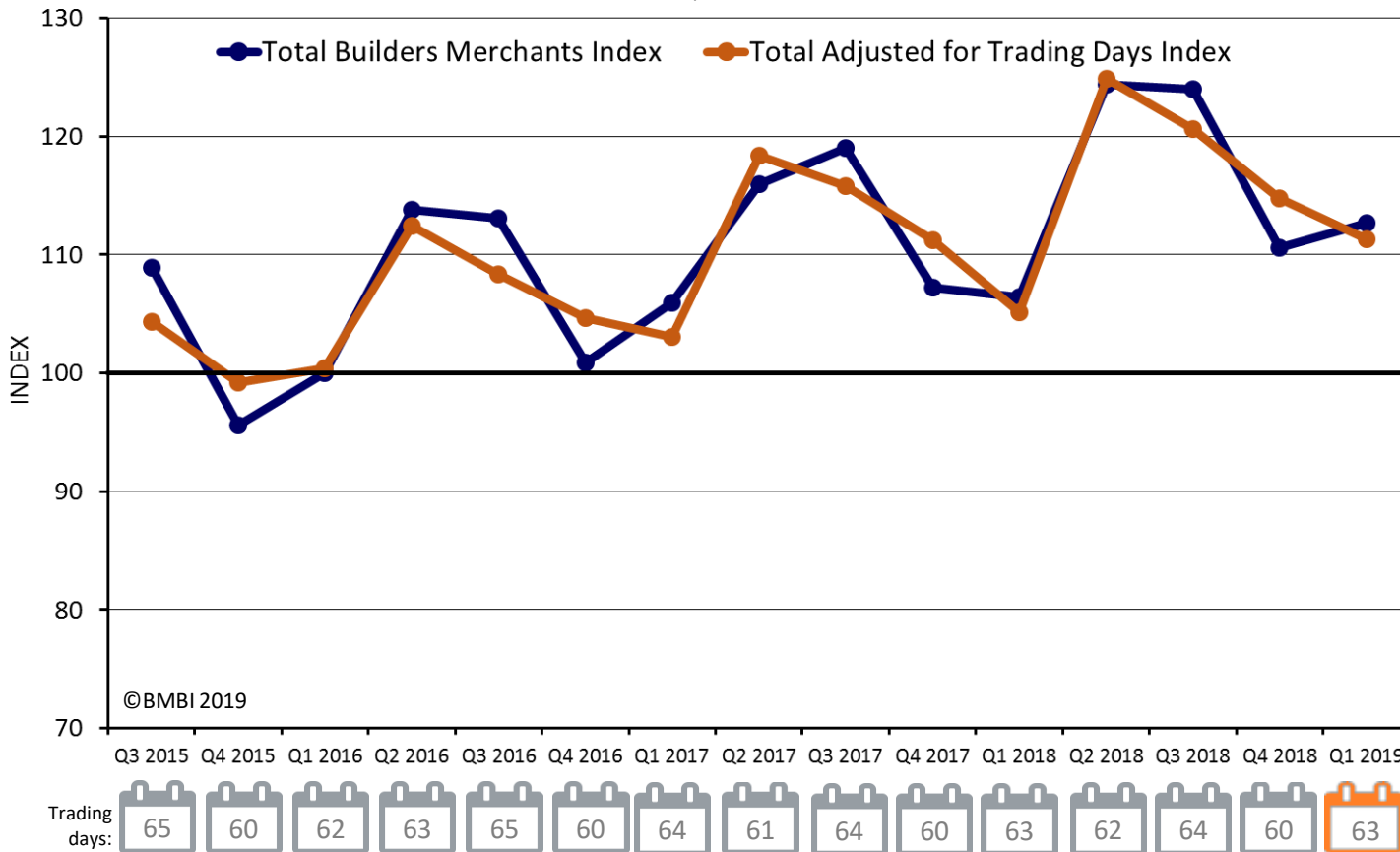
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2019

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



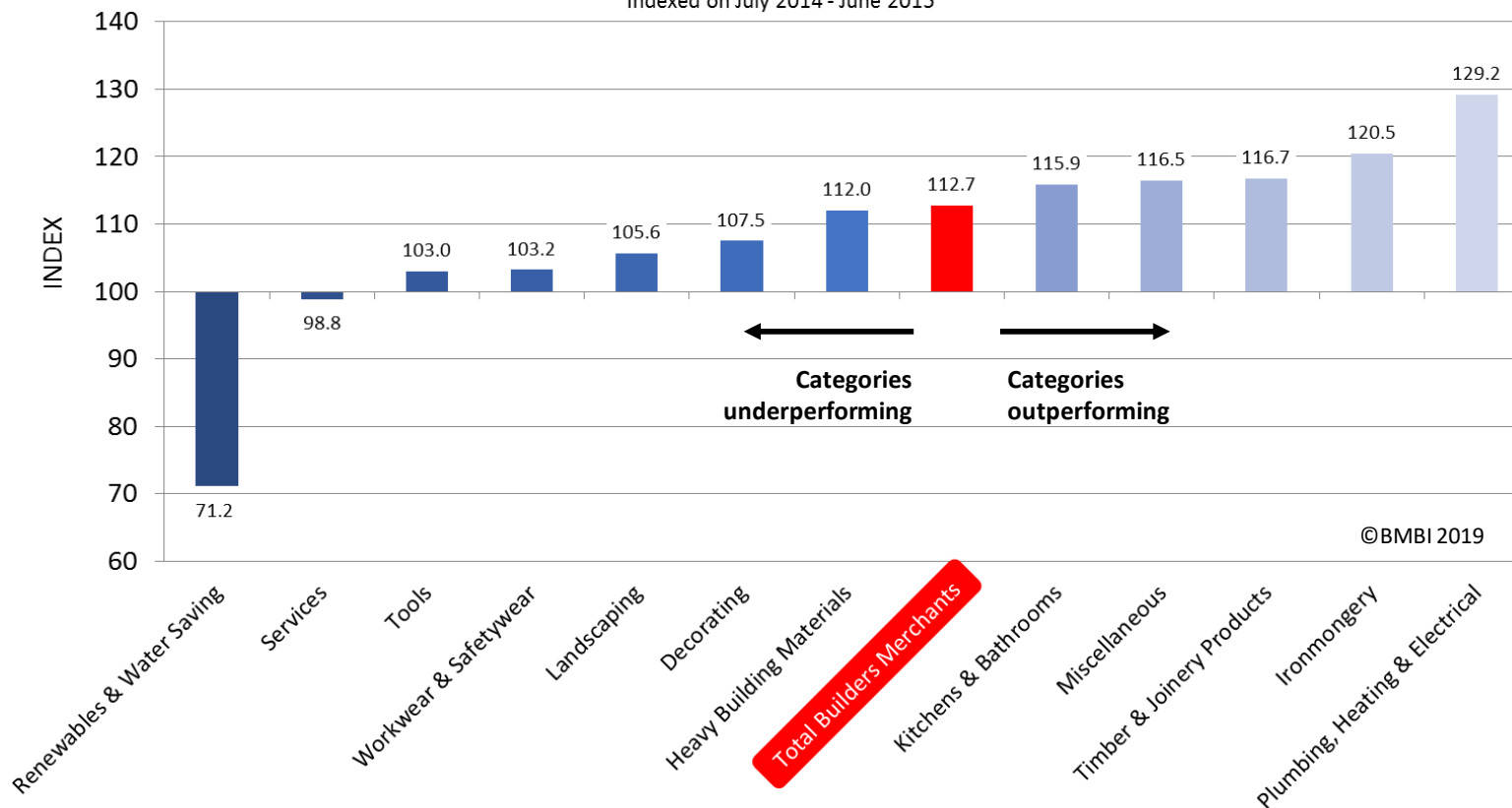
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2019

Quarterly: Index and Categories

Q1 2019 index

Quarter 1 2019

Indexed on July 2014 - June 2015



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

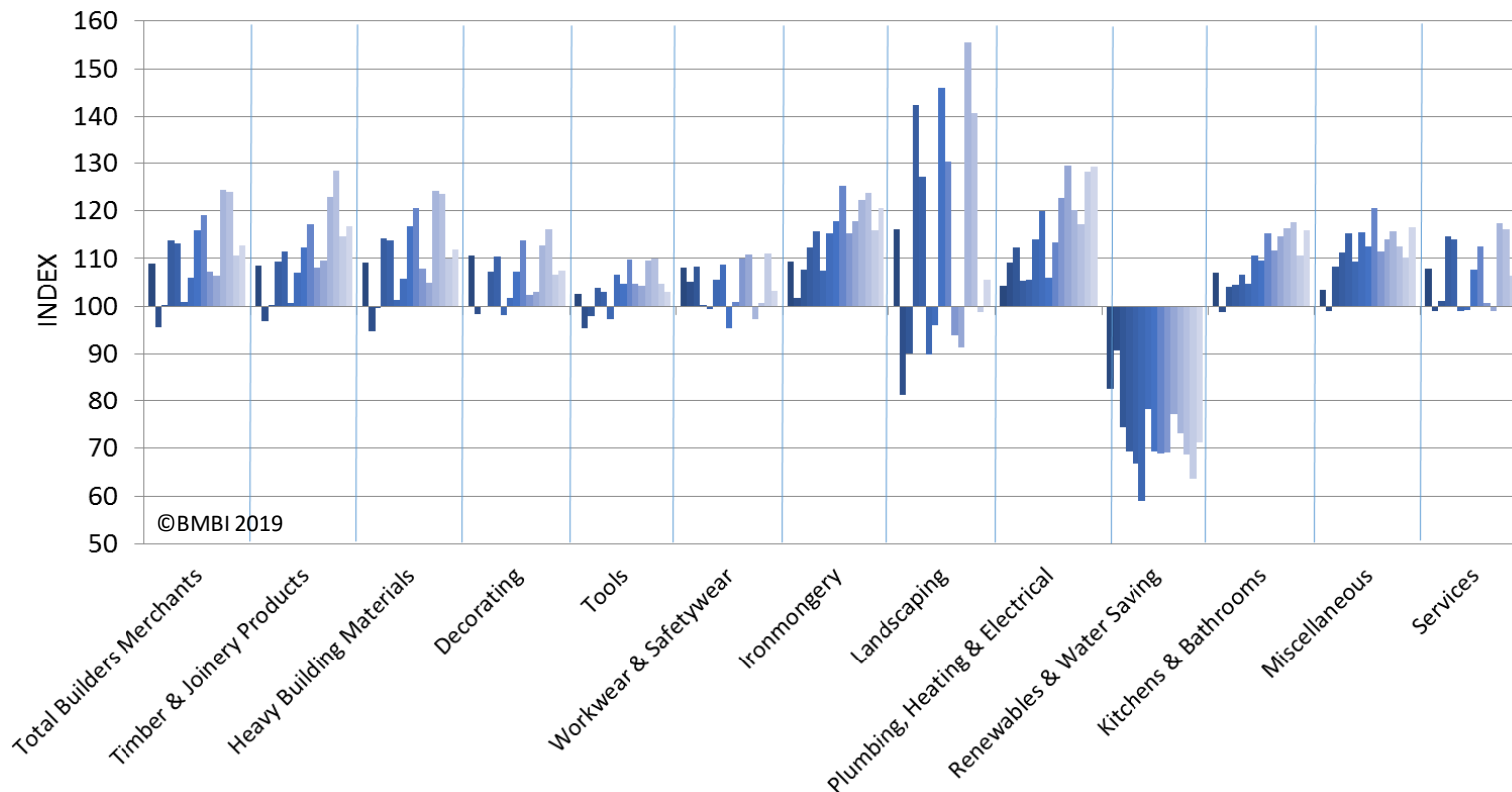
Quarterly: Index and Categories

Quarterly indices

Quarterly Indices

Indexed on July 2014 to June 2015

Chart shows quarterly indices, by category, from Q3 2015 (darkest blue) to Q1 2019 (lightest blue)

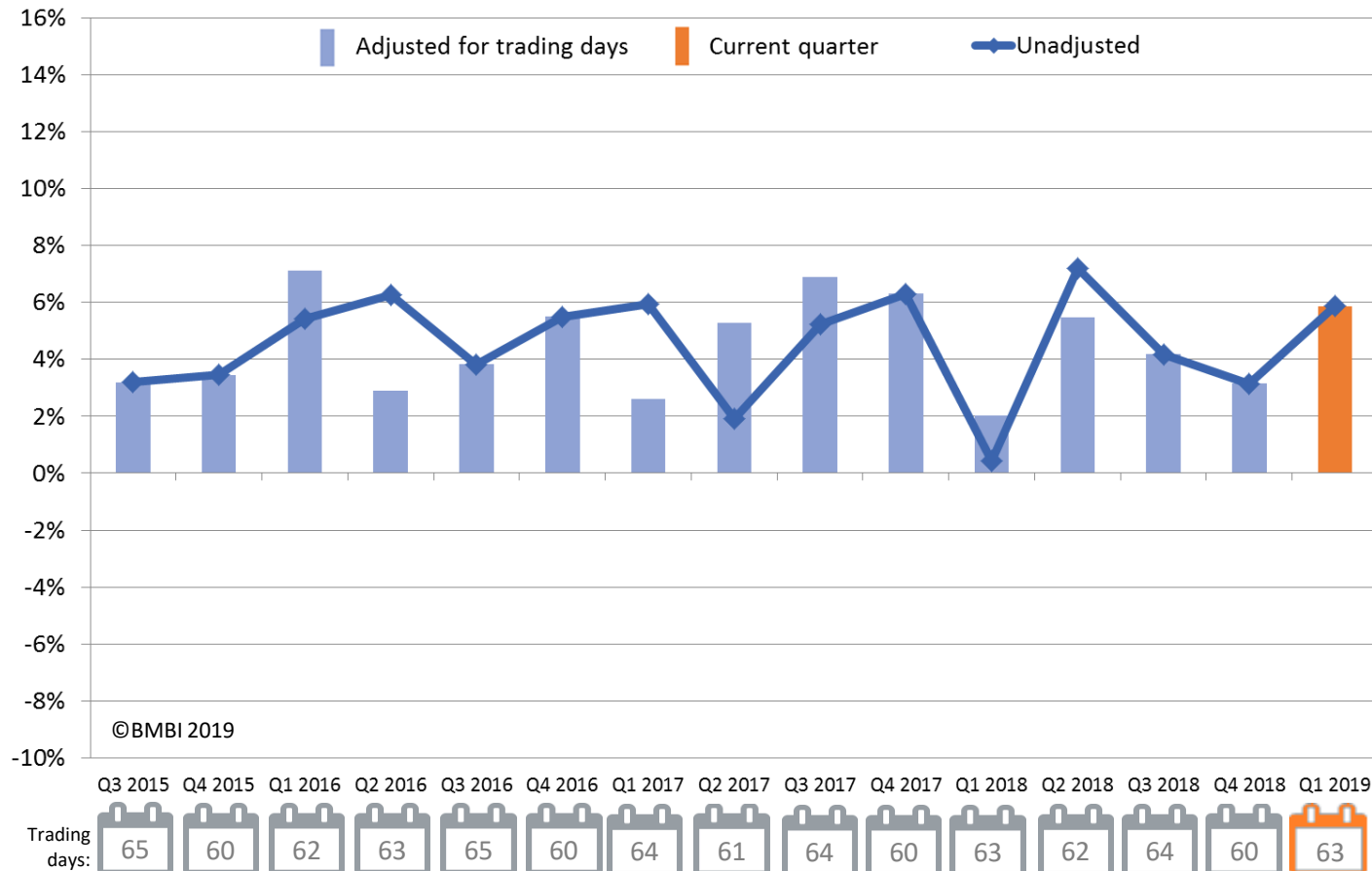


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2019

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year

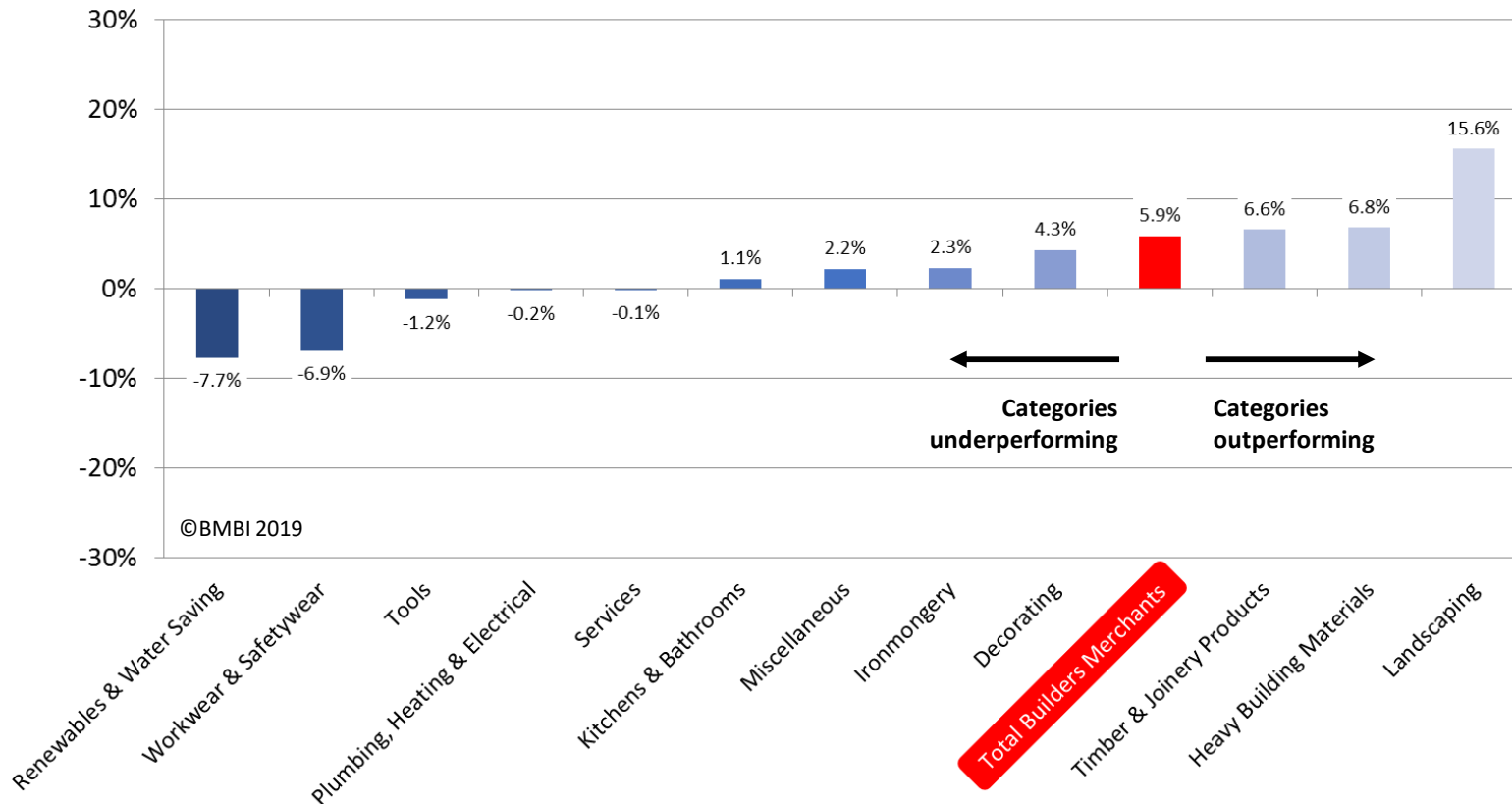


 Source: GfK's Builders Merchants Total Category Report July 2015 to March 2019

Quarterly: This Year v Last Year

Q1 2019 sales indices

Quarter 1 2019 index v Quarter 1 2018 index



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

Quarterly: Quarter on Quarter

Q1 2019 sales indices

Quarter 1 2019 index v Quarter 4 2018 index

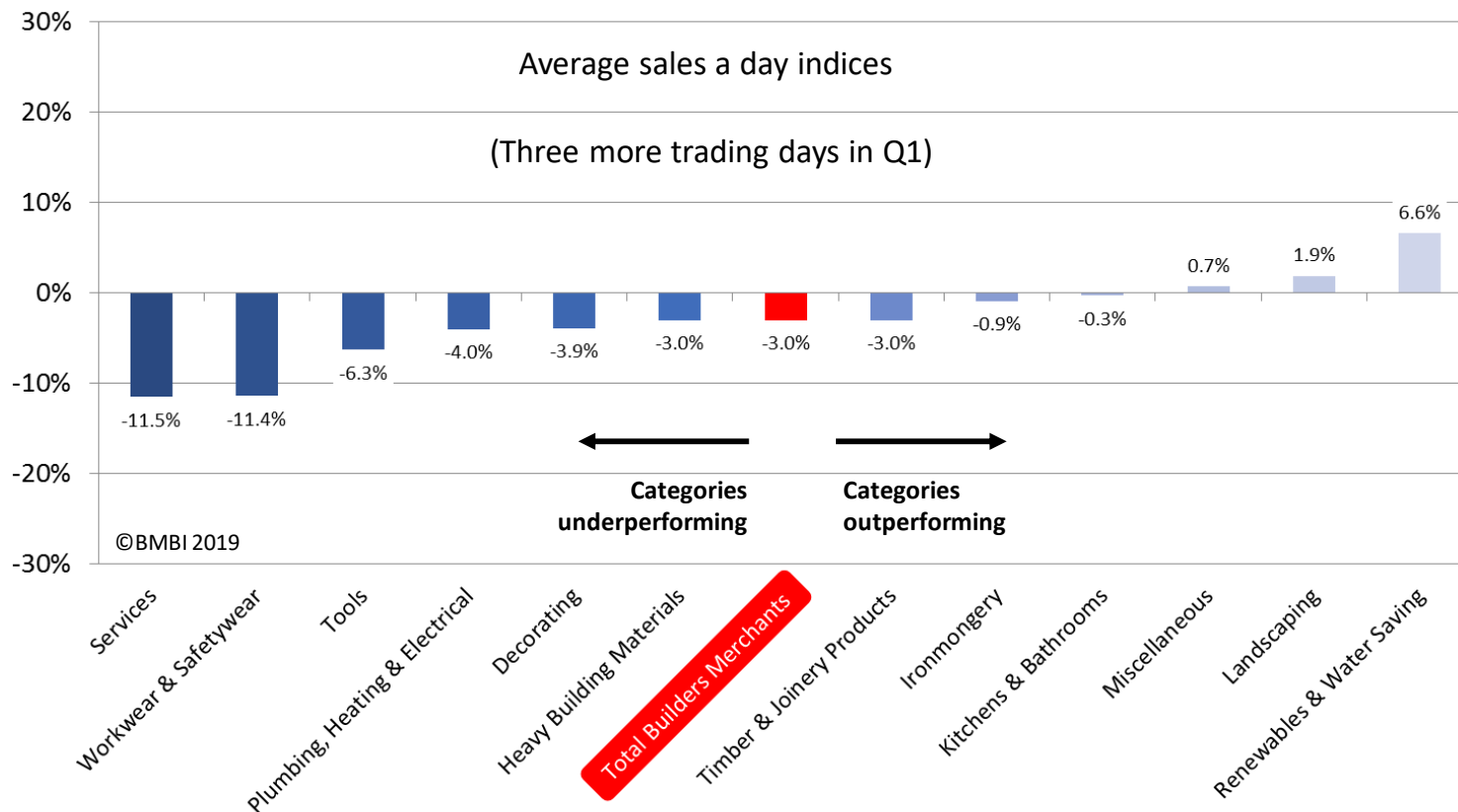


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2019

Quarterly: Quarter on Quarter

Average sales a day indices

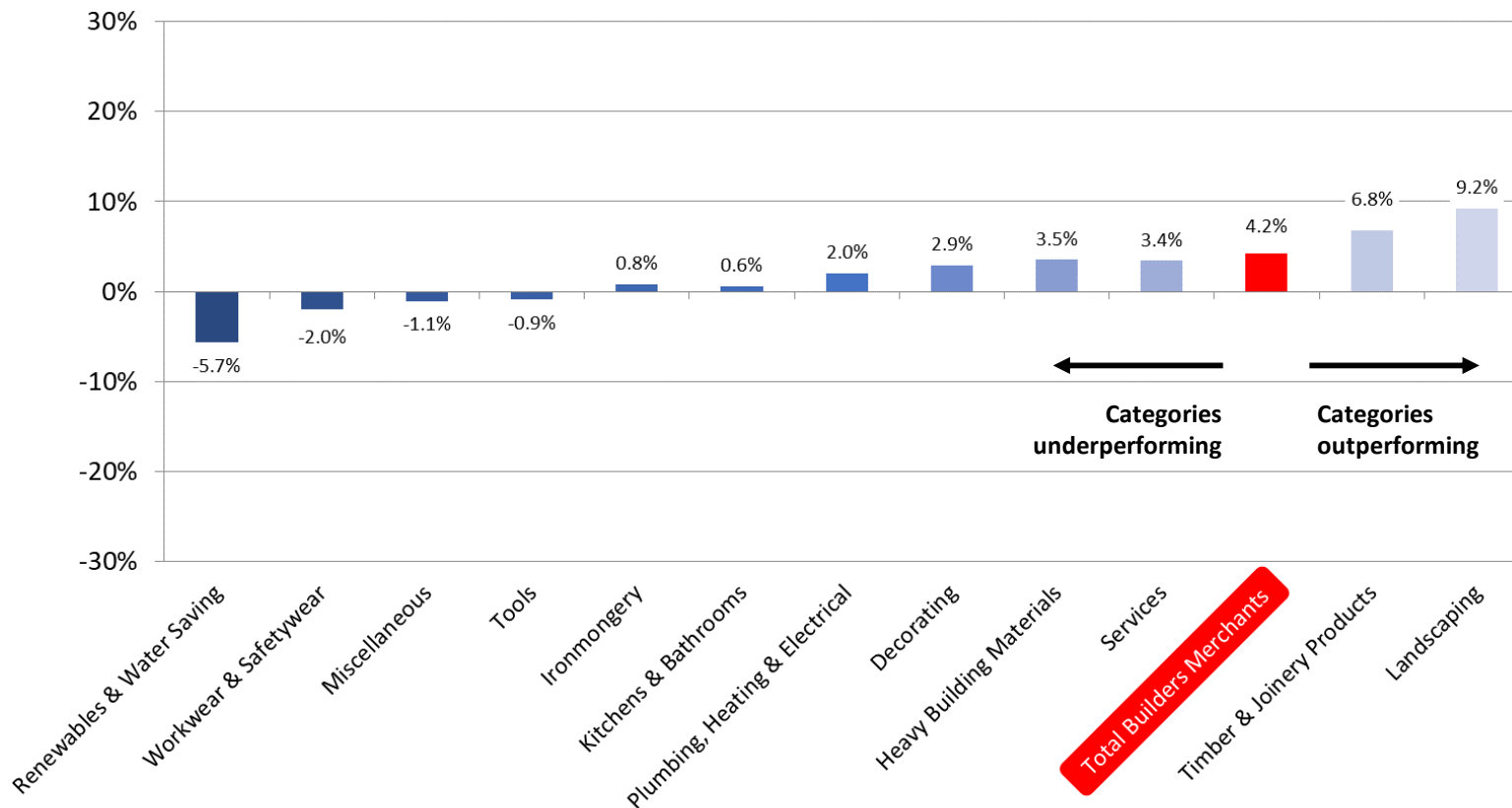
Quarter 1 2019 Index v Quarter 4 2018



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

Last 12 Months: Year on Year

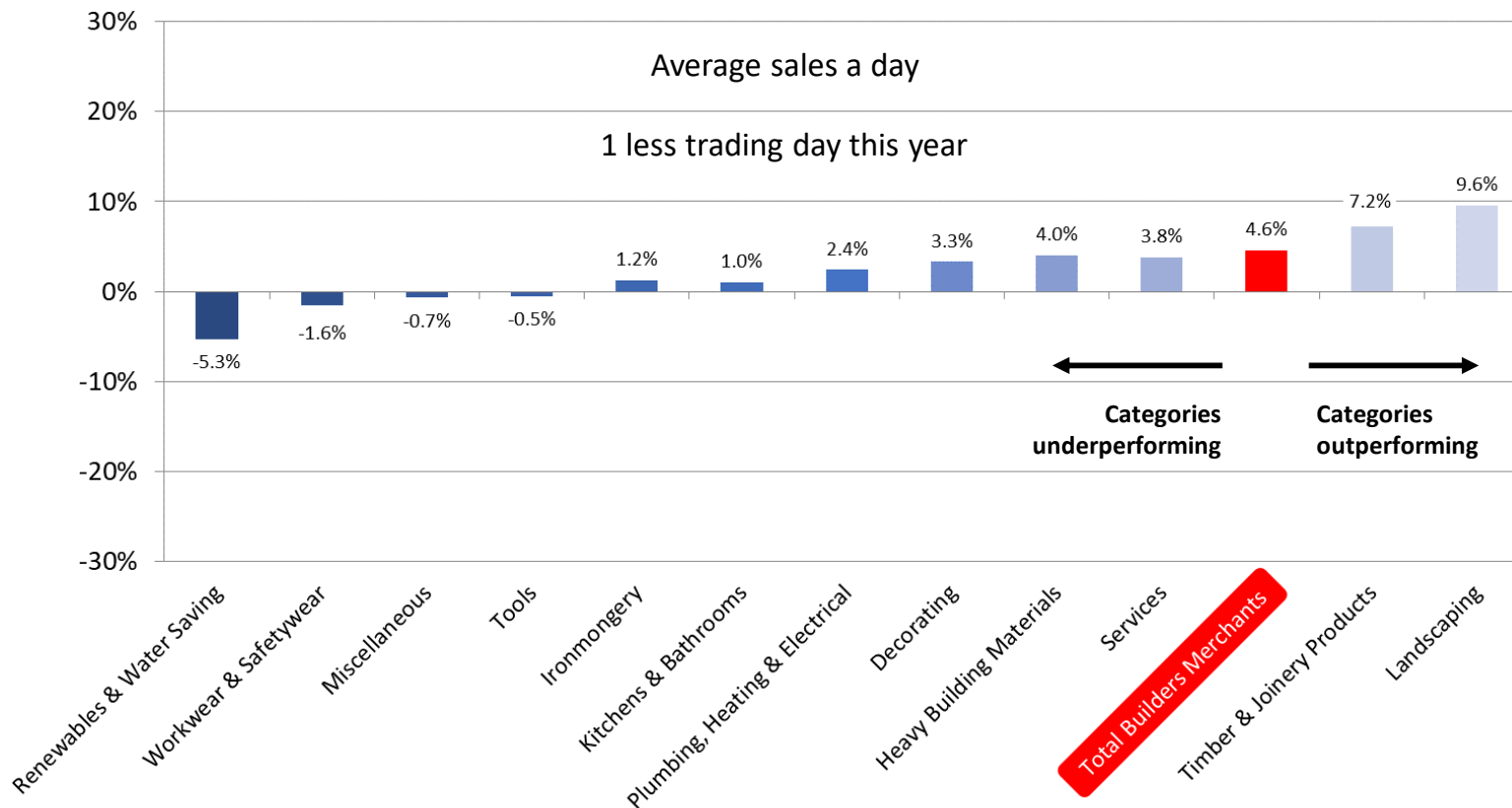
12 months Jun 18 to May 19 v 12 months Jun 17 to May 18



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

12 Months: Year on Year Average sales a day indices

12 months Jun 18 to May 19 v 12 months Jun 17 to May 18

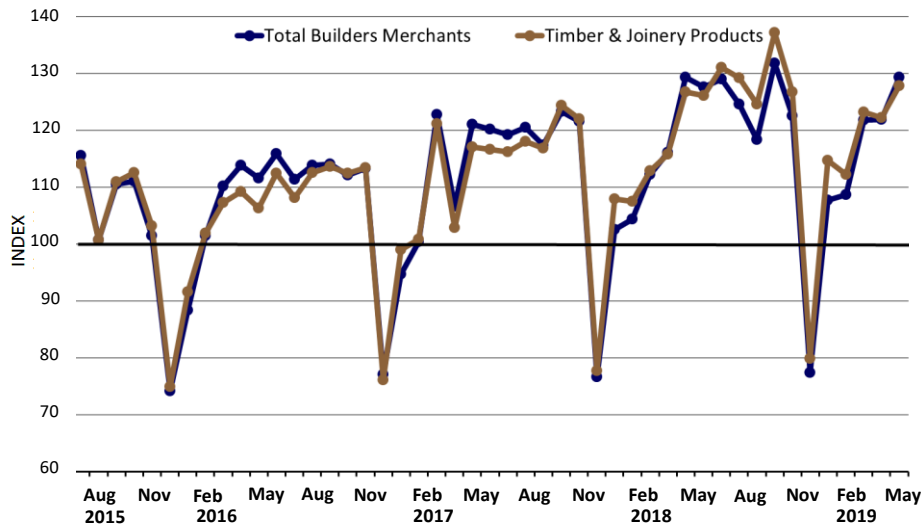


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

Monthly: Indices

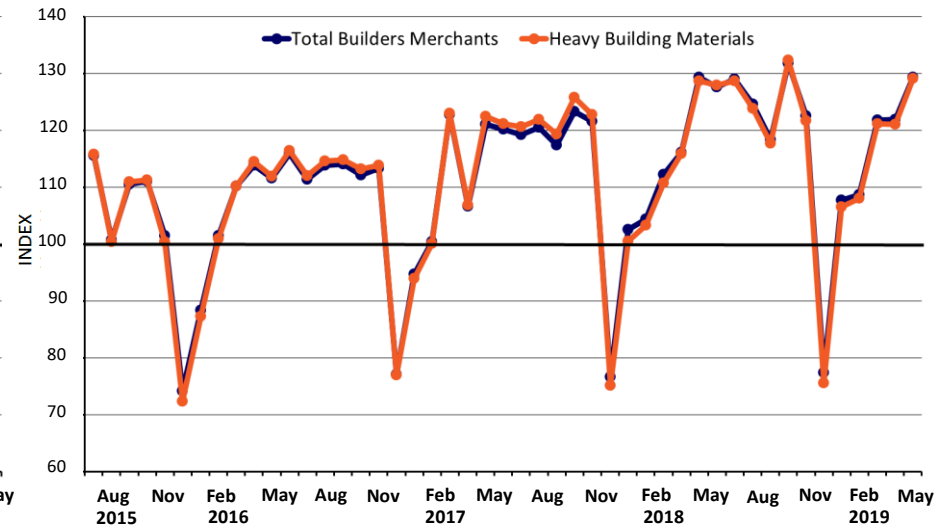
May 2019

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



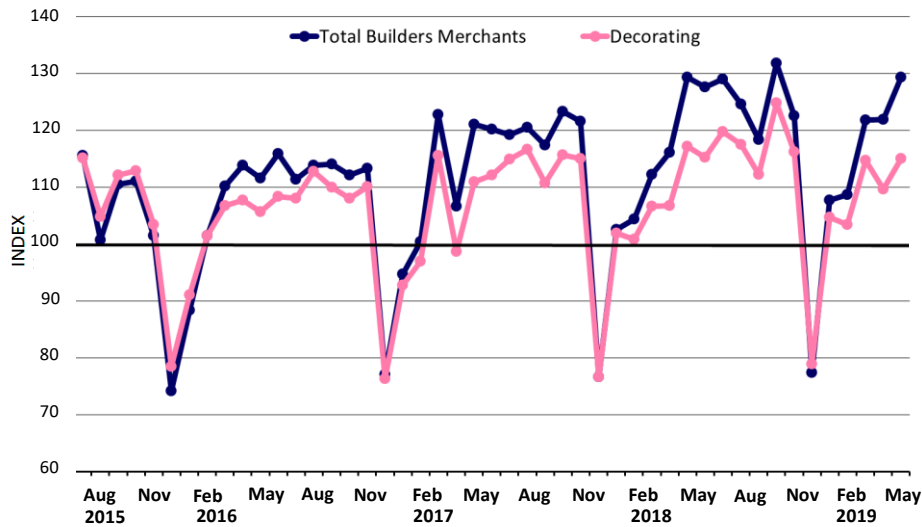
Indexed on July 2014 – June 2015

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

Monthly: Indices

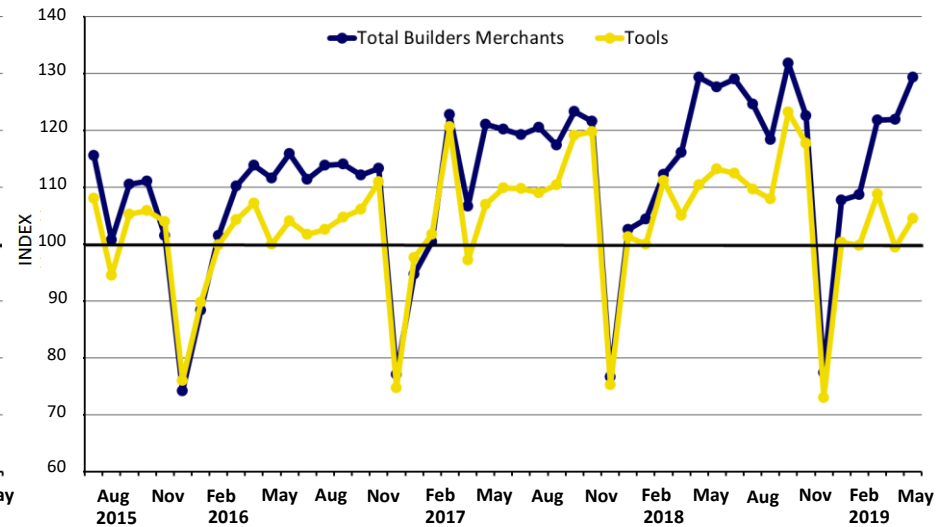
May 2019

Decorating



Indexed on July 2014 – June 2015

Tools

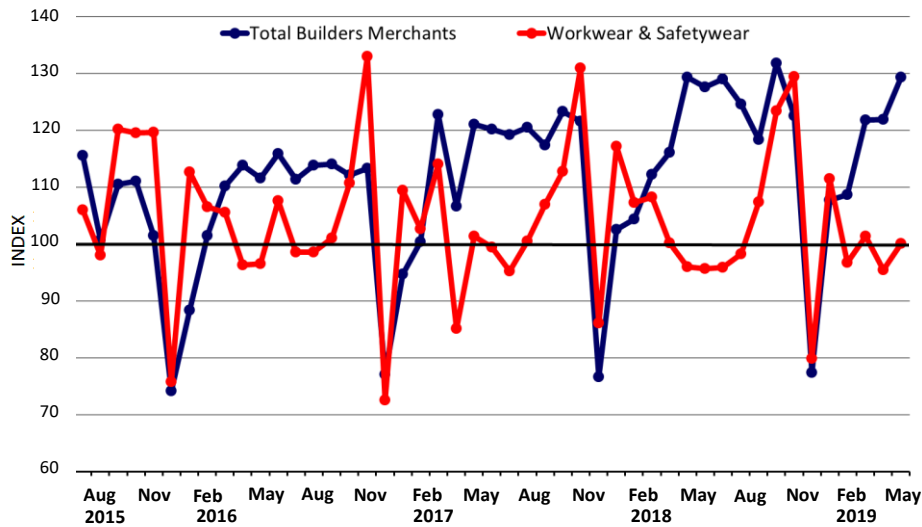


Indexed on July 2014 – June 2015

Monthly: Indices

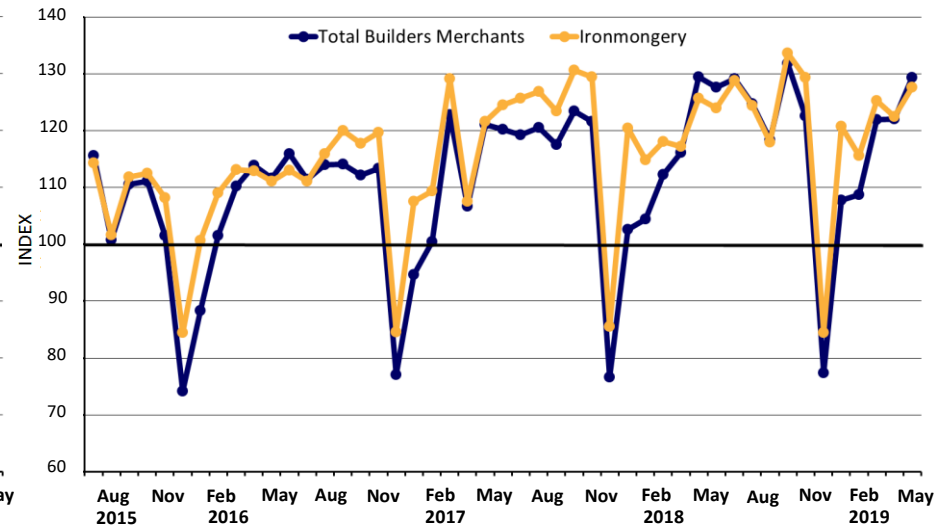
May 2019

Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery



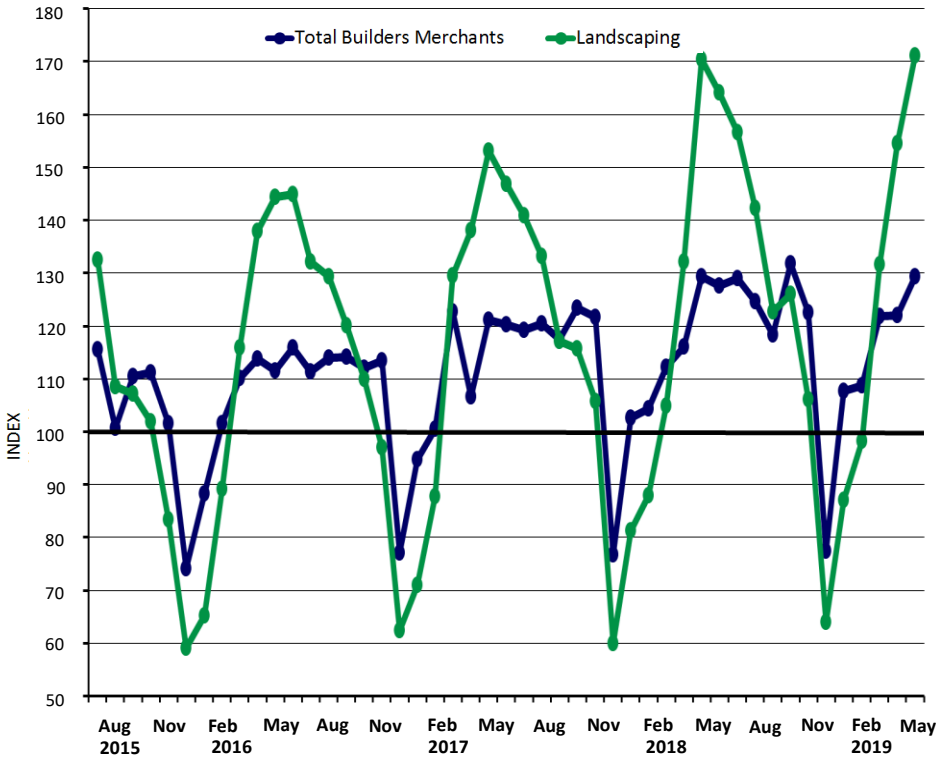
Indexed on July 2014 – June 2015

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

Monthly: Indices

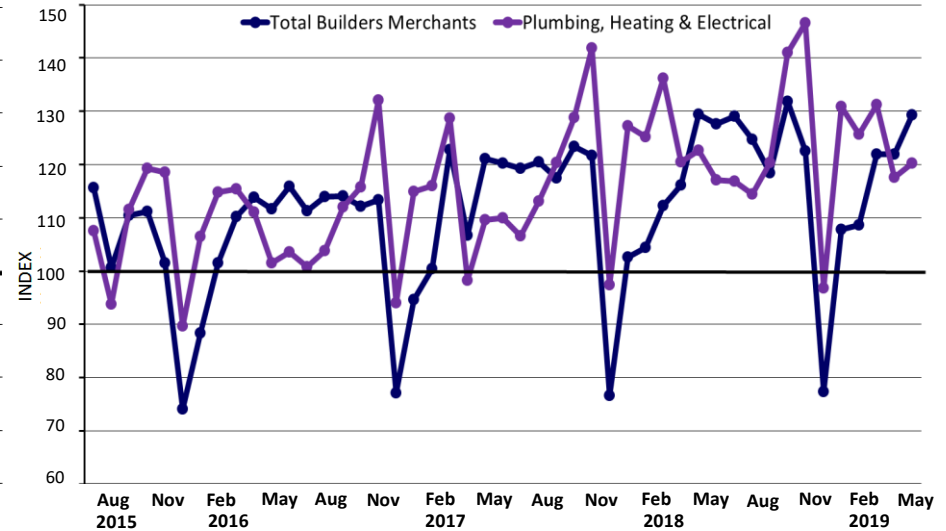
May 2019

Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

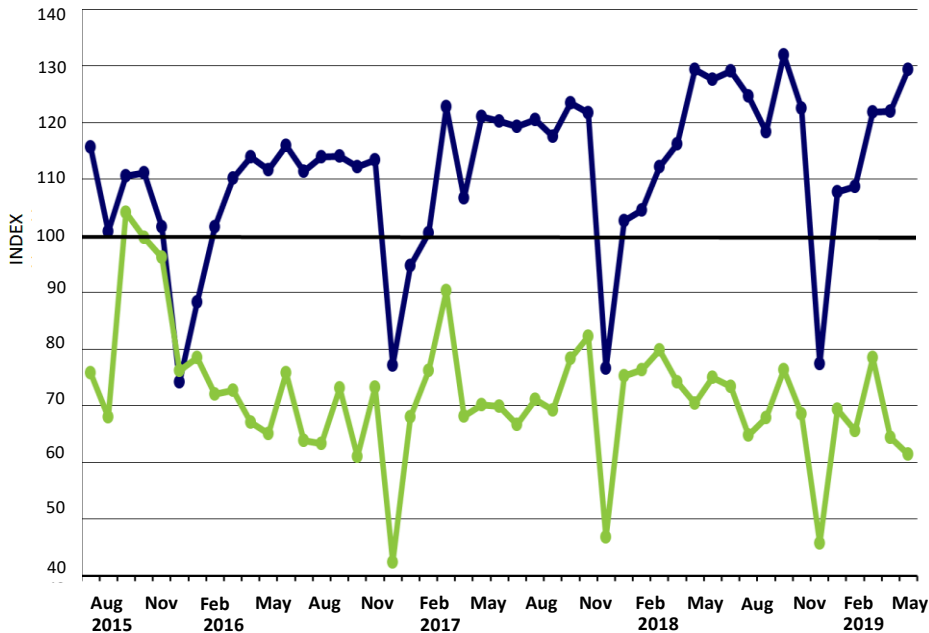
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

Monthly: Indices

May 2019

Renewables & Water Saving

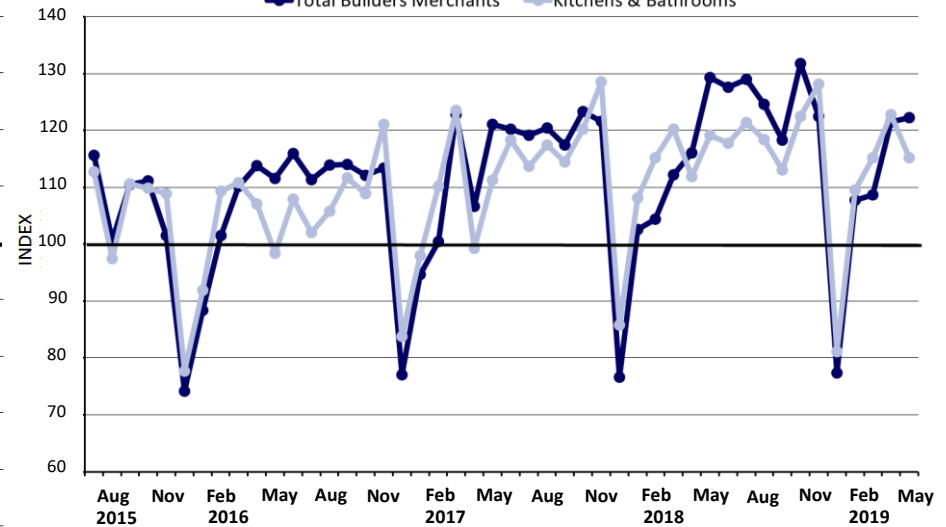
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms

● Total Builders Merchants ● Kitchens & Bathrooms

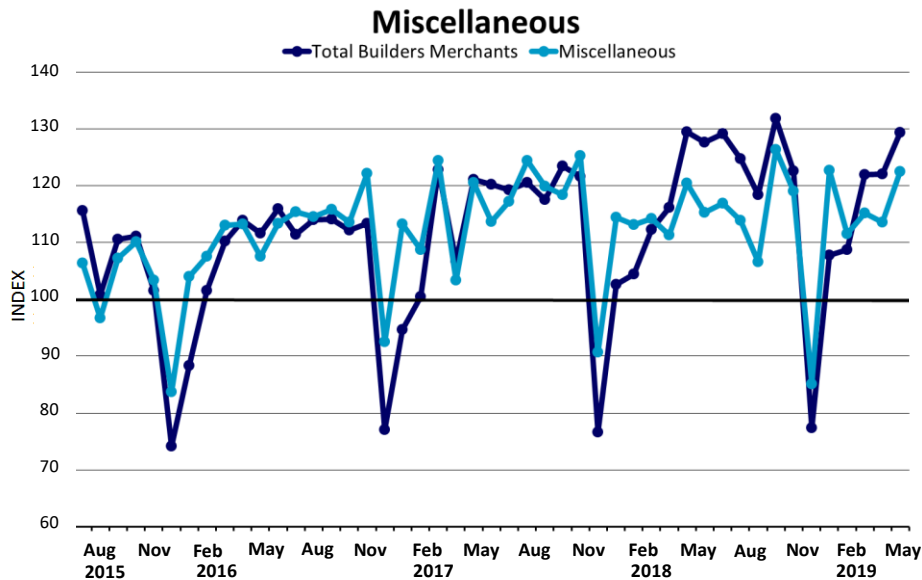


Indexed on July 2014 – June 2015

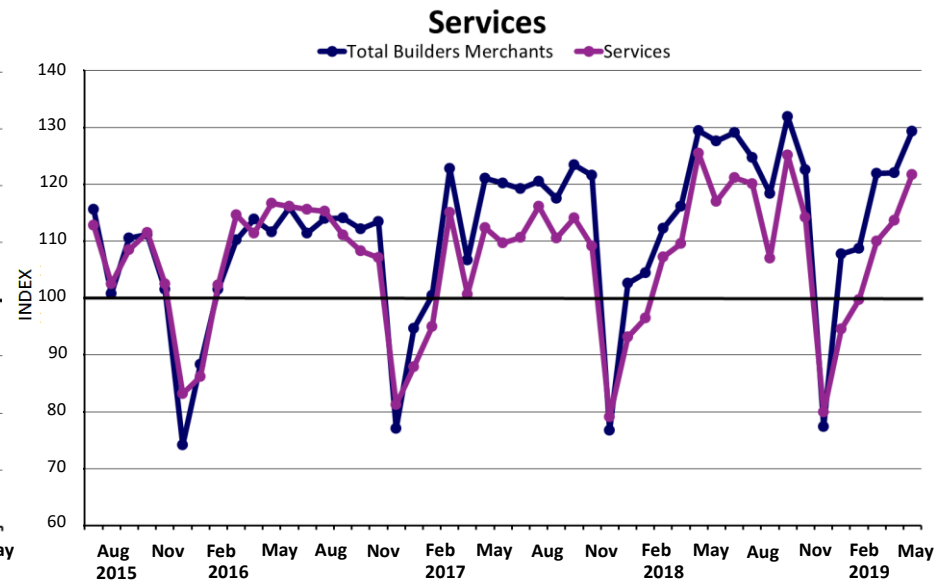
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

Monthly: Indices

May 2019



Indexed on July 2014 – June 2015



Indexed on July 2014 – June 2015

NB: The April 2019 index for services has been updated following a data submission revision.

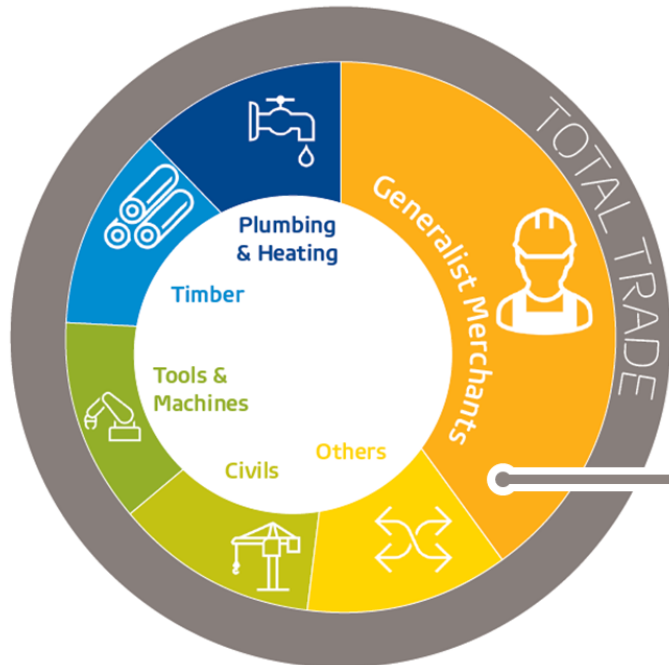
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2019

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

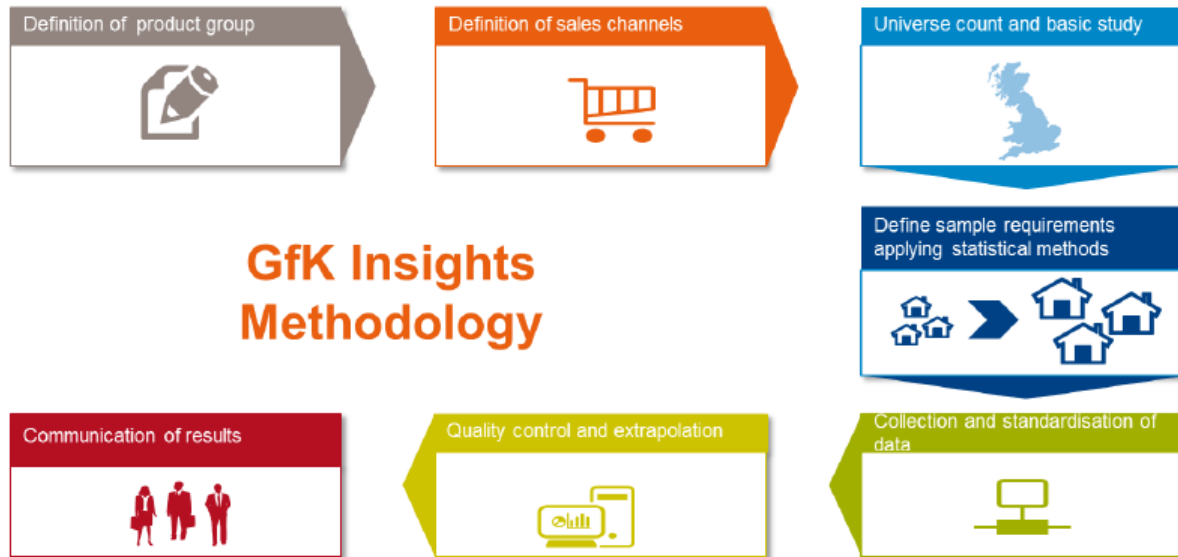
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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)

BMF Forecast Report

Q2 2019 edition



Builders Merchants Industry Forecast Report

The BMF have released the Q2 edition of their Builders Merchants Industry Forecast.

While Builders Merchants Building Index (BMBI) data, which is provided by GfK and is based on actual sales category performance, has enabled users to see which products and regions are currently growing, the forecast report takes this one stage further to meet the industry's need for accurate forecasting.

The BMF forecast model incorporates several lead indicators to signal future events that will impact our markets.

Using BMBI data coupled with advanced modelling techniques the BMF have developed a channel specific forecasting model to show what is likely to happen in the next 12 months, making it possible for merchants and suppliers to forecast their customers' requirements more accurately.

The report is updated on a quarterly basis, with the Q2 edition available now. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Nyssa Patel on 024 7685 4994 or email nyssa.patel@bmf.org.uk



**Builders Merchants
Industry Forecast**
2019 - 2021

Nyssa Patel
Industry Analyst/Economist
Quarter 2 edition – £195

The BMF. Building your people. Building your skills. Building your business. Building your voice. Building excellence.

Contact us

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