

“building **excellence**  
in materials supply”

# Builders Merchant Building Index



Monthly report for July 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 Q2 report.

The collage features several report covers:

- Monthly and Quarterly Indices June 2019 and Q2 2019:** Includes charts for Heavy Building Materials and Heavy Building Materials - Quarterly.
- GfK's Product Categories Reports cover category headline values & in-depth, level insights:** Shows a pie chart and various product category insights.
- Macro factors impacting Merchants:** Features a line graph for the Consumer Confidence Index.
- Expert Panel Civils, Metal Rainwater & Drainage:** A report by John Cox, Commercial Director of Alumasac, discussing market challenges and forecasts.
- In-depth product group reporting:** Provides detailed analysis for specific product groups.

# 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 relatively small samples or 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. It's therefore a very good proxy for housing RMI.

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. BMBI data is highlighted by the Department for Business, Energy & Industrial Strategy in its monthly construction update, alongside the ONS, CPA, Experian, IHS Markit and the Bank of England.

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.

## **Further recognition for BMBI**

One of the aims of BMBI is to reach across and beyond construction. It's now syndicated to a growing number of trade magazines in different sectors on a regular basis. Outside the industry, economists, banks, consultancies, investment bodies and the big accountants regularly refer to it and BMBI is referenced alongside the Office for National Statistics (ONS) data in the Government Department for Business, Energy and Industrial Strategy (BEIS) monthly construction update. In addition, the Sunday Times sought BMBI Experts in February for a contribution to a review on preparations for Brexit. This August, BBC News contacted one of the BMBI Experts and MRA on the same subject.

## **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 Emile van der Ryst at [emile.van-der-ryst@gfk.com](mailto:emile.van-der-ryst@gfk.com).

# Overview

## July sales up 2.9% year on year

### Year on year

Total Builders Merchants sales in July were up 2.9% in value compared with the same month last year.

Most categories saw sales increase compared to July 2018. Workwear & Safetywear (+13.4%) Kitchens & Bathrooms (+6.4%), Plumbing, Heating & Electrical (+6.0%) and Landscaping (+5.6%) increased the most. Among other categories, Timber and Joinery Products (-0.1%) and Tools (-5.1%) were down.

With one more trading day in July 2019, Total Builders Merchant average sales a day were down 1.6% on July 2018. However, Workwear & Safetywear (+8.5%), Kitchens & Bathrooms (+1.8%), Plumbing, Heating & Electrical (+1.4%) and Landscaping (+1.0%) sold more per day.

### Month on month

Compared with the previous month (June), July was up 13.3%. Much of this growth can be attributed to the trading day difference of 3 days between June and July.

On a sales a day basis only two sectors performed better in July than June, Services (+2.6%) and Miscellaneous (+3.9%). Other best performers were Decorating (-0.1%) and Kitchens & Bathrooms (-0.3%).

Adjusted for trading days, Total Builders Merchant sales were 1.5% down. For comparison, Office of National Statistics (ONS) data for July estimates RMI growth was flat.

### Rolling 3 months

Comparing the three months May, June and July 2019 with February, March and April 2019, Total Builders Merchants sales were up 7.6%. When adjusted for trading days, growth was up 2.5%.

### Index

July's BMBI index was 132.8, with Landscaping the highest category at 165.4. Heavy Building Materials was very close to the overall figure at 132.5.

Total Builders Merchants sales in July were up 2.9% in value compared with the same month last year. Most categories saw sales increase this July compared to July 2018.

# The Expert Panel

## Speaking for their markets - 1



The Builders Merchant Building Index (BMBI) includes a growing panel of industry Experts. In each quarterly report they comment on the market, with a particular focus on the story behind the trends. Experts are leading brands, or brands aspiring to become leaders, who are the voice of their markets.

The Q2 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: Q2 2019 Report](#)



**John Coe**  
Commercial Director  
Alumasc Water Management Systems



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

[Read latest Comment: Q2 2019 Report](#)



**John Duffin**  
Managing Director  
Keylite Roof Windows



**Expert for Roof Windows**

[Read latest Comment: Q2 2019 Report](#)



**Andrew Simpson**  
National Commercial Director  
Hanson Cement



**Expert for Cement & Aggregates**

[Read latest Comment: Q2 2019 Report](#)



**Nigel Cox**  
Managing Director  
Timbmet



**Expert for Timber & Panel Products**

[Read latest Comment: Q2 2019 Report](#)



**Paul Owen**  
Commercial Director Distribution  
IKO PLC



**Expert for Roofing Products**

[Read latest Comment: Q2 2019 Report](#)

# The Expert Panel

## Speaking for their markets - 2



**Derrick McFarland**  
Managing Director  
Keystone Lintels

**Expert for Steel Lintels**



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**Simon Taylor**  
Director of Sales – Builders Merchants  
Ibstock

**Expert for Bricks**



[Read latest Comment: Q2 2019 Report](#)



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

**Expert for Mineral Wool Insulation**



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

**Expert for Water Heating**



[Read latest Comment: Q2 2019 Report](#)



**Mike Beard**  
Merchant Development  
Director  
Encon Insulation

**Expert for Insulation Products -  
Distribution**



[Read latest Comment: Q2 2019 Report](#)



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

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



[Read latest Comment: Q2 2019 Report](#)



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

**Expert for Paint**



[Read latest Comment: Q2 2019 Report](#)



**Mike Tattam**  
Sales & Marketing Director  
Lakes

**Expert for Shower Enclosures and  
Showering**



[Read latest Comment: Q2 2019 Report](#)



# Monthly: Index and Categories

## July 2018\* – July 2019

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



MONTHLY SALES VALUE INDEX	Index	2018					2019							
		July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July
<b>Total Builders Merchants</b>	<b>100</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>	<b>121.9</b>	<b>122.0</b>	<b>129.3</b>	<b>117.2</b>	<b>132.8</b>
Timber & Joinery Products	100	131.1	129.3	124.7	137.2	126.8	79.9	114.7	112.2	123.3	122.3	127.9	118.3	130.9
Heavy Building Materials	100	128.8	123.9	117.8	132.4	121.8	75.6	106.6	108.1	121.2	121.1	129.2	116.2	132.5
Decorating	100	119.7	117.5	112.3	124.8	116.3	78.9	104.7	103.4	114.8	109.7	115.1	108.1	124.2
Tools	100	112.5	109.7	108.0	123.2	117.8	73.0	100.3	99.8	108.8	99.5	104.5	96.7	106.7
Workwear & Safetywear	100	95.9	98.3	107.5	123.5	129.5	79.9	111.5	96.8	101.5	95.5	100.1	99.3	108.8
Ironmongery	100	128.8	124.4	117.9	133.6	129.3	84.5	120.8	115.5	125.2	122.5	127.6	117.7	133.1
Landscaping	100	156.6	142.4	122.8	126.0	106.1	64.0	87.1	98.2	131.6	154.5	171.1	146.6	165.4
Plumbing, Heating & Electrical	100	116.8	114.5	120.4	141.1	146.5	96.9	130.8	125.7	131.2	117.6	120.2	109.7	123.8
Renewables & Water Saving	100	73.5	64.8	67.8	76.4	68.5	45.8	69.3	65.7	78.5	64.5	61.4	73.1	76.1
Kitchens & Bathrooms	100	121.4	118.4	113.0	122.5	128.2	81.2	109.5	115.3	122.8	115.2	116.5	112.7	129.2
Miscellaneous	100	116.8	113.9	106.6	126.3	119.1	85.1	122.7	111.6	115.1	113.6	122.5	113.7	135.8
Services	100	121.1	120.1	106.9	125.1	114.2	79.9	94.5	99.7	110.0	113.6	121.8	106.4	125.6

\*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.

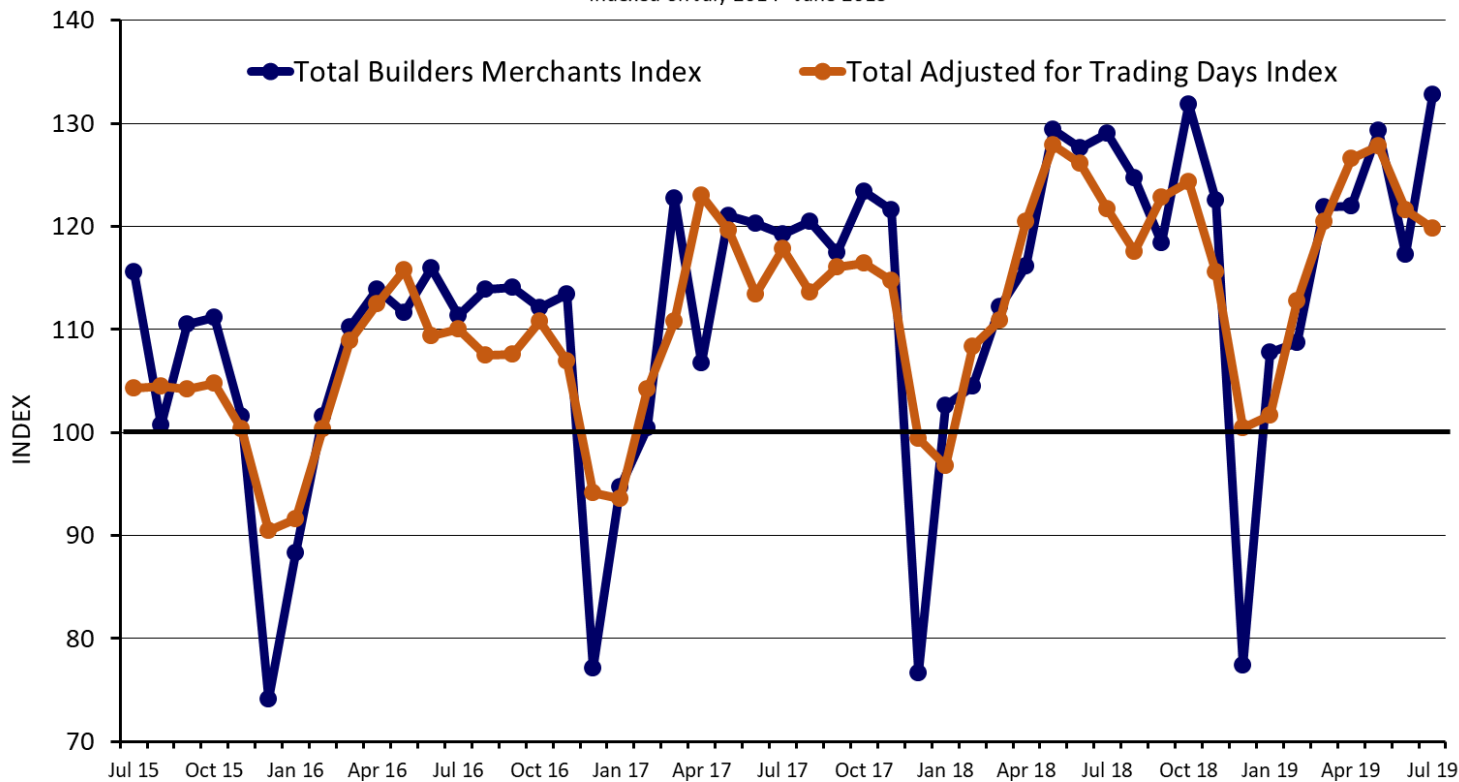
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# 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



For number of trading days, see [Slide 34](#)

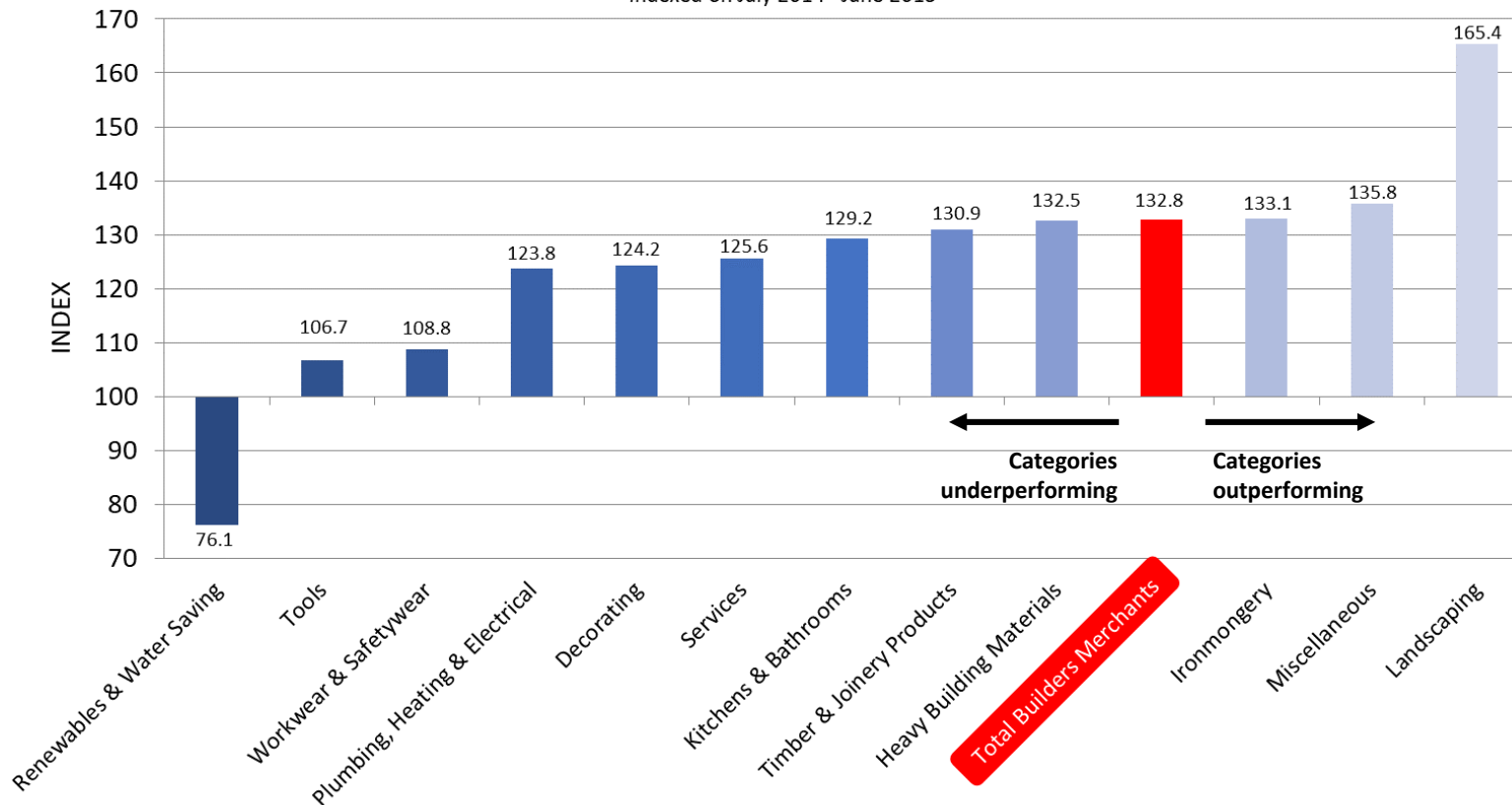
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: Index and Categories

## July 2019 index

### July 2019 Index

Indexed on July 2014 - June 2015

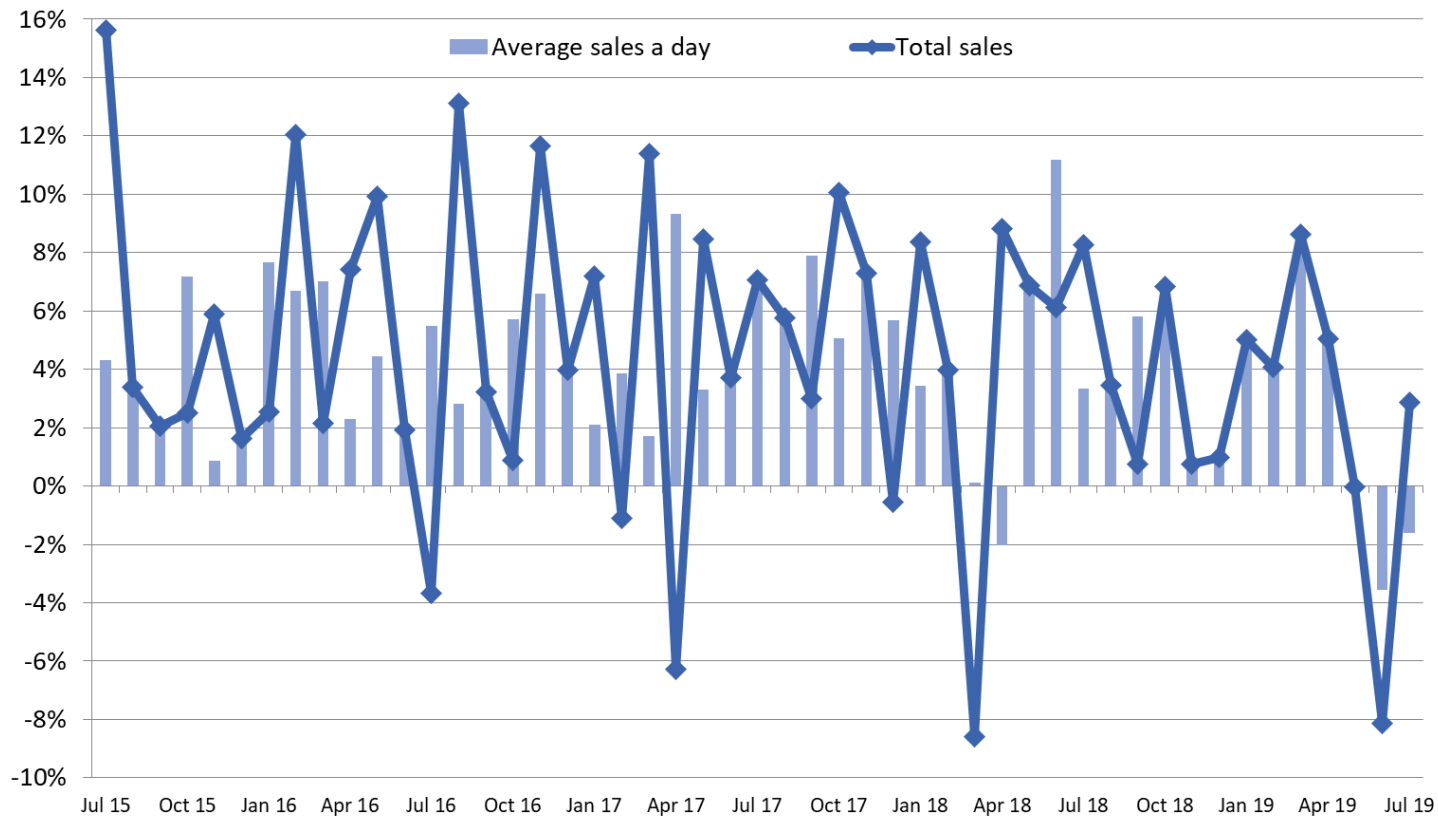


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: Sales Indices

## Adjusted and unadjusted for trading days

### Monthly: Year on Year



For number of trading days, see [Slide 34](#)

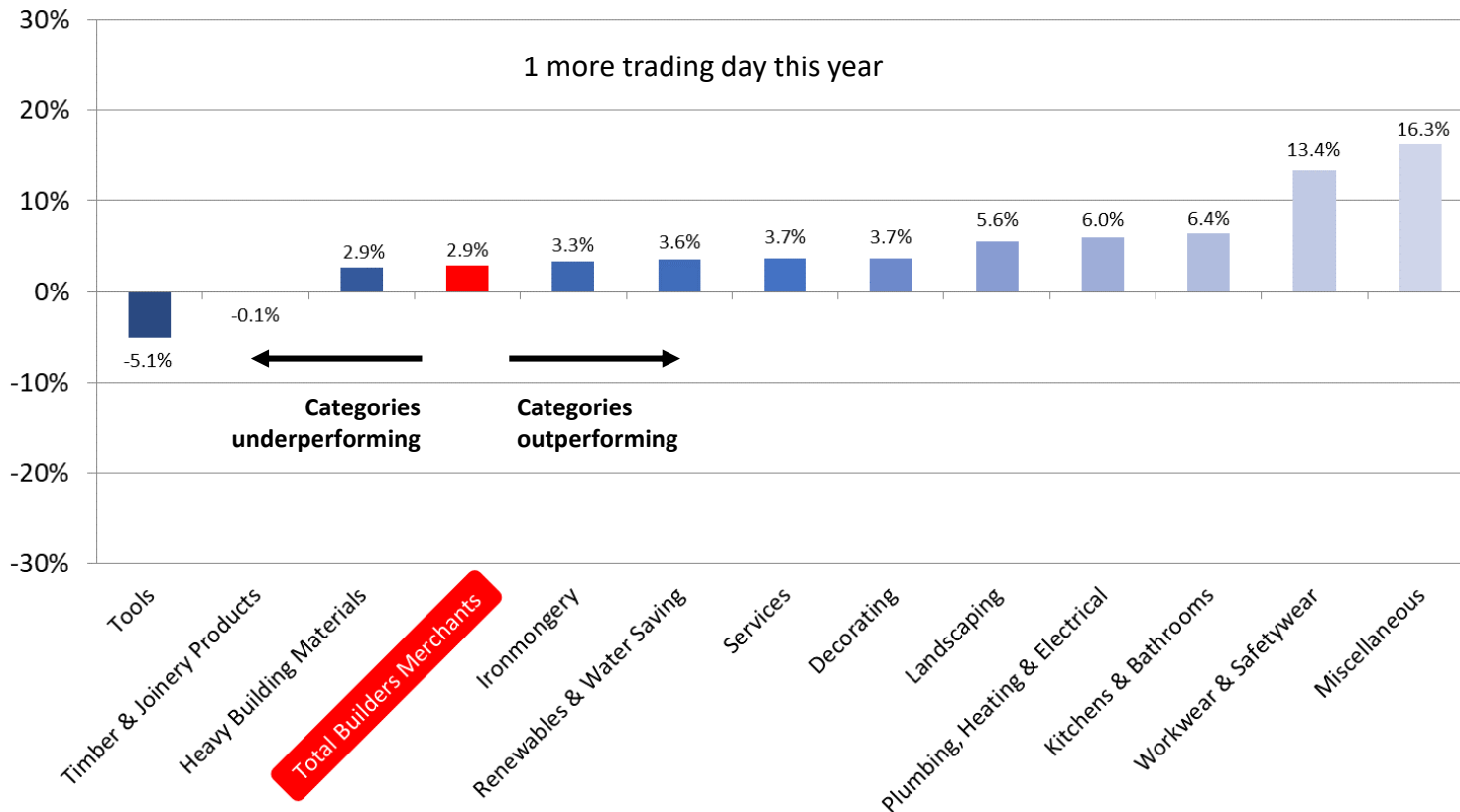
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: This Year v Last Year

## July 2019 sales indices



### July 2019 index v July 2018 index



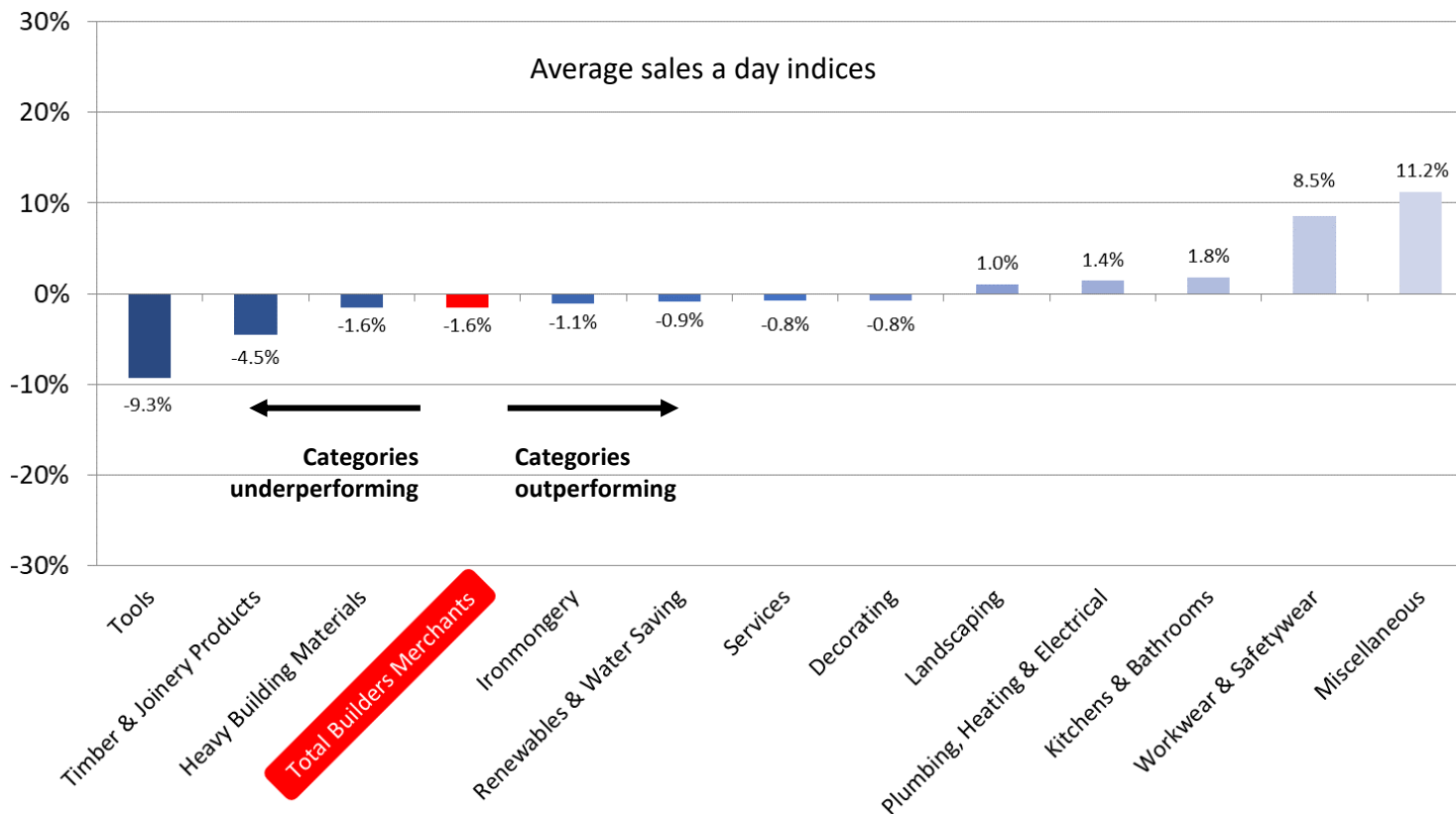
Source: GfK's Builders Merchants Total Category Report July 2015 to July 2019

# Monthly: This Year v Last Year

## July 2019 average sales a day indices



### July 2019 index v July 2018 index

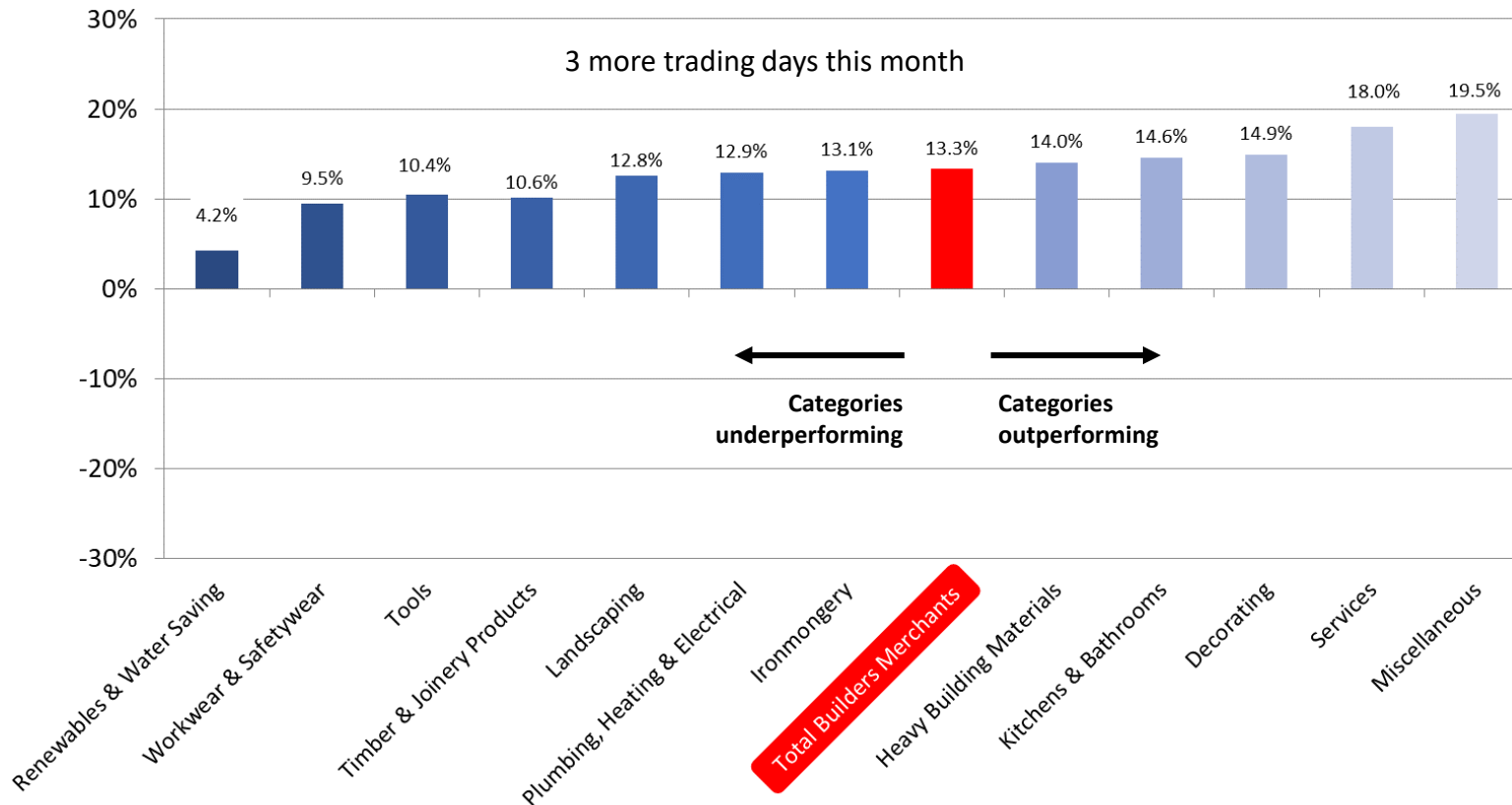


Source: GfK's Builders Merchants Total Category Report July 2015 to July 2019

# Monthly: This Month v Last Month

## July 2019 sales indices

### July 2019 index v June 2019 index



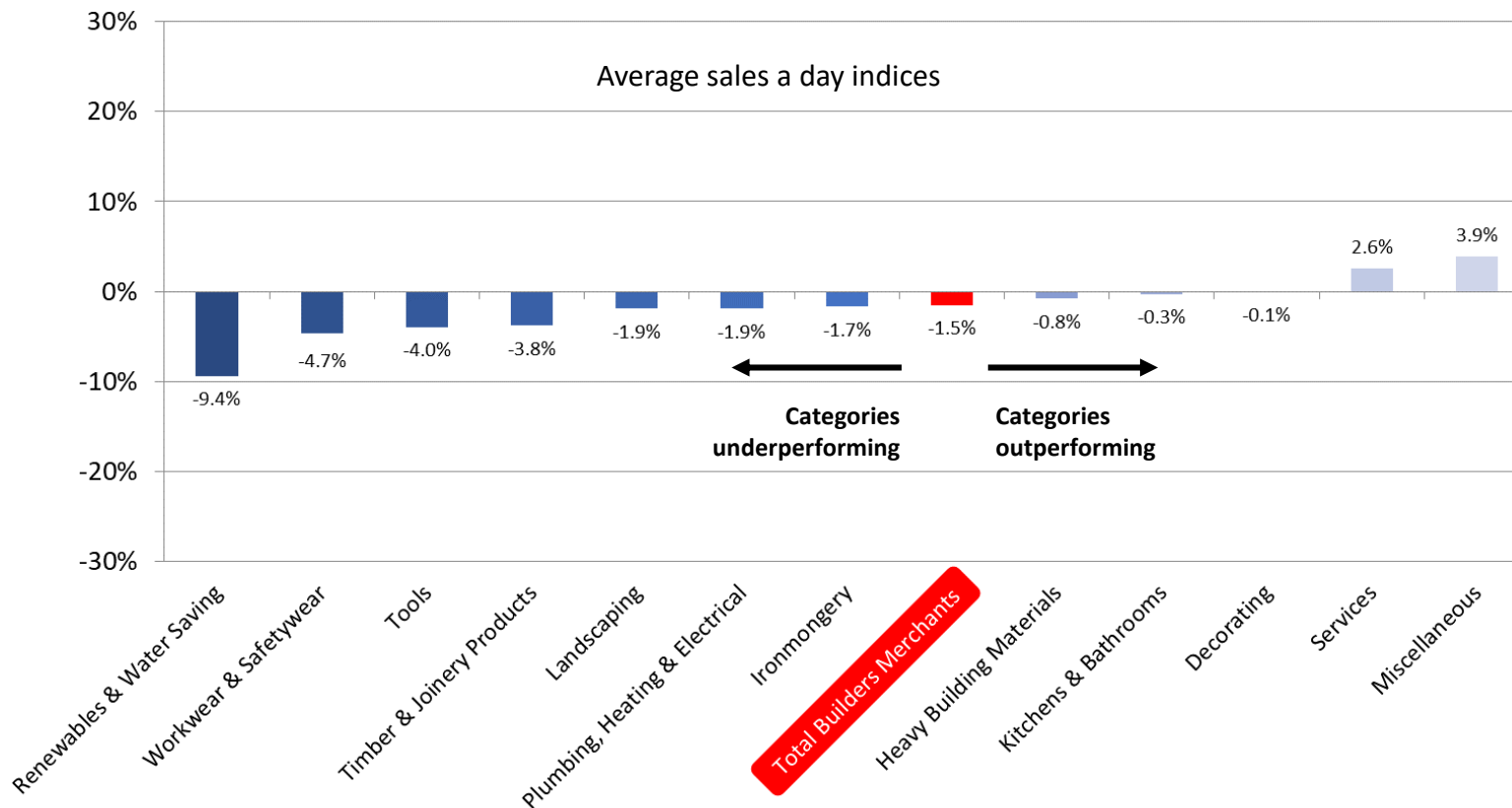
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: This Month v Last Month

## July 2019 average sales a day indices



### July 2019 index v June 2019 index



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



# Quarterly: Index and Categories

## Quarter 2 2018\* to Quarter 2 2019

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q2 2018	Q3 2018	Q4 2018	Q1 2019	Q2 2019
<b>Total Builders Merchants</b>	<b>100</b>	<b>124.4</b>	<b>124.0</b>	<b>110.6</b>	<b>112.7</b>	<b>122.9</b>
Timber & Joinery Products	100	122.9	128.3	114.7	116.7	122.8
Heavy Building Materials	100	124.2	123.5	109.9	112.0	122.2
Decorating	100	112.8	116.2	106.5	107.5	111.0
Tools	100	109.6	110.1	104.7	103.0	100.2
Workwear & Safetywear	100	97.3	100.6	110.9	103.2	98.3
Ironmongery	100	122.3	123.7	115.8	120.5	122.6
Landscaping	100	155.5	140.6	98.7	105.6	157.4
Plumbing, Heating & Electrical	100	120.1	117.2	128.1	129.2	115.8
Renewables & Water Saving	100	73.2	68.7	63.6	71.2	66.3
Kitchens & Bathrooms	100	116.3	117.6	110.6	115.9	114.8
Miscellaneous	100	115.7	112.4	110.1	116.5	116.6
Services	100	117.3	116.1	106.4	98.8	113.9

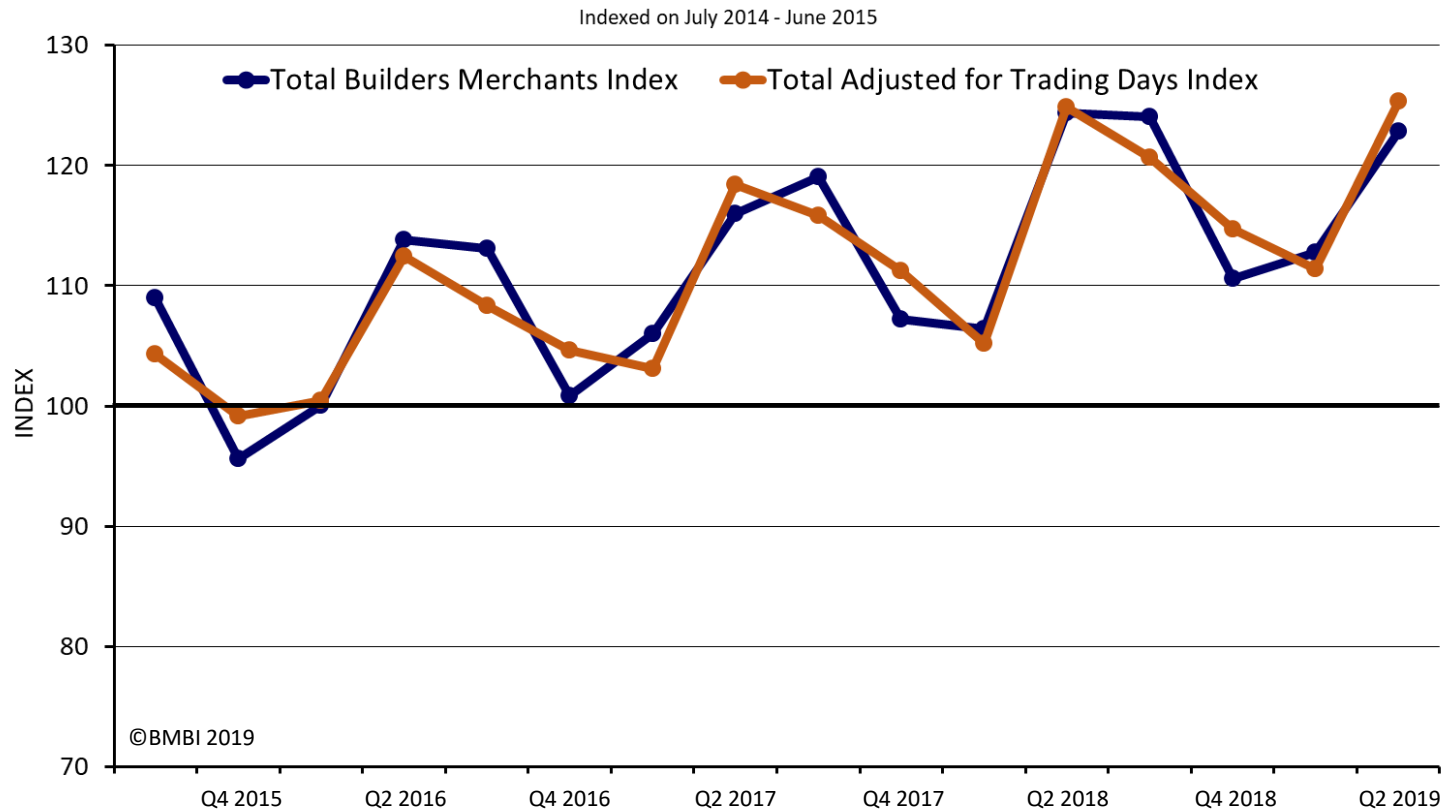
\*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

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

# Quarterly: Index

## Adjusted and unadjusted for trading days

### Total Builders Merchants Index v Total Adjusted for Trading Days Index



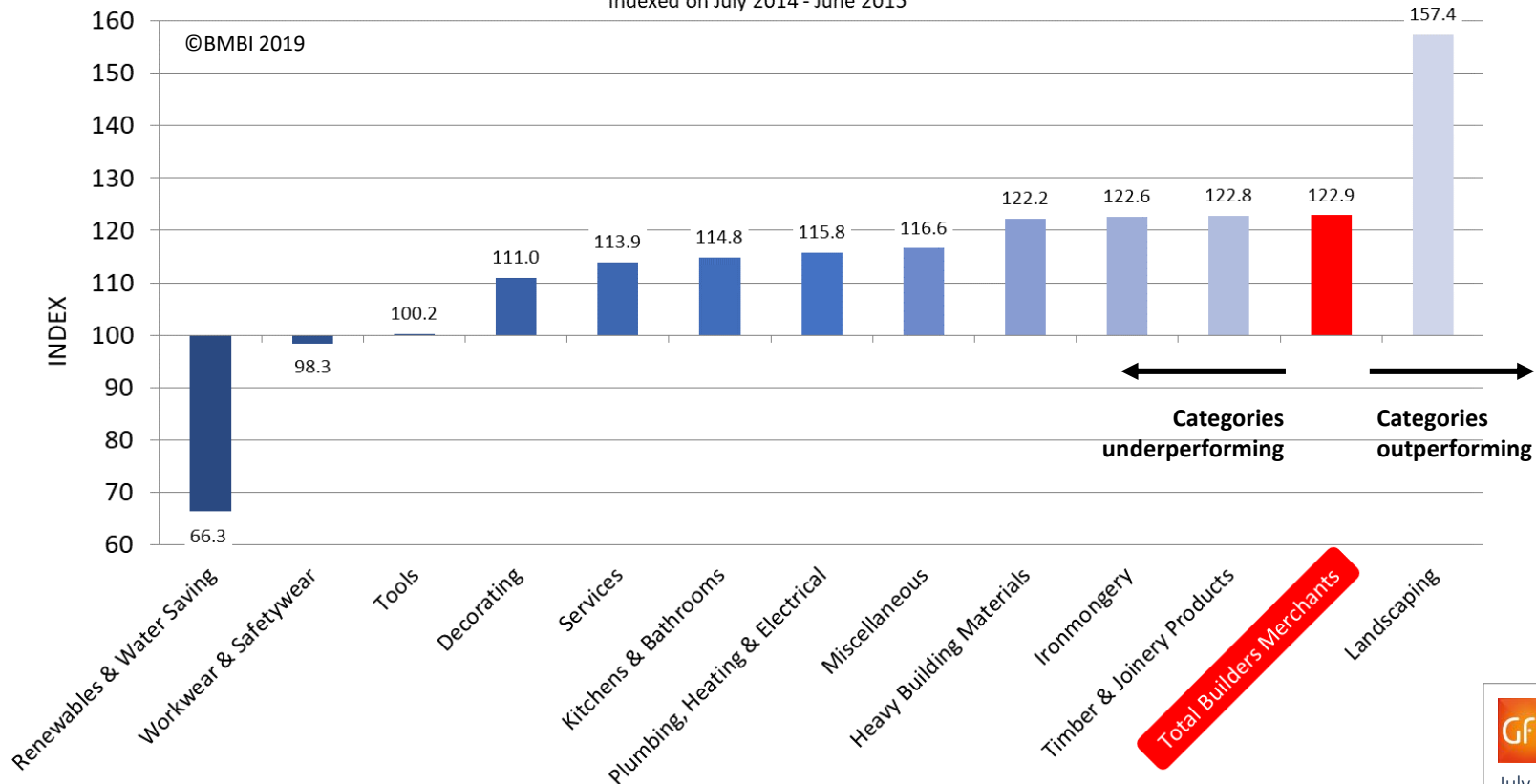
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2019


# Quarterly: Index and Categories

## Q2 2019 index

### Quarter 2 2019

Indexed on July 2014 - June 2015



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

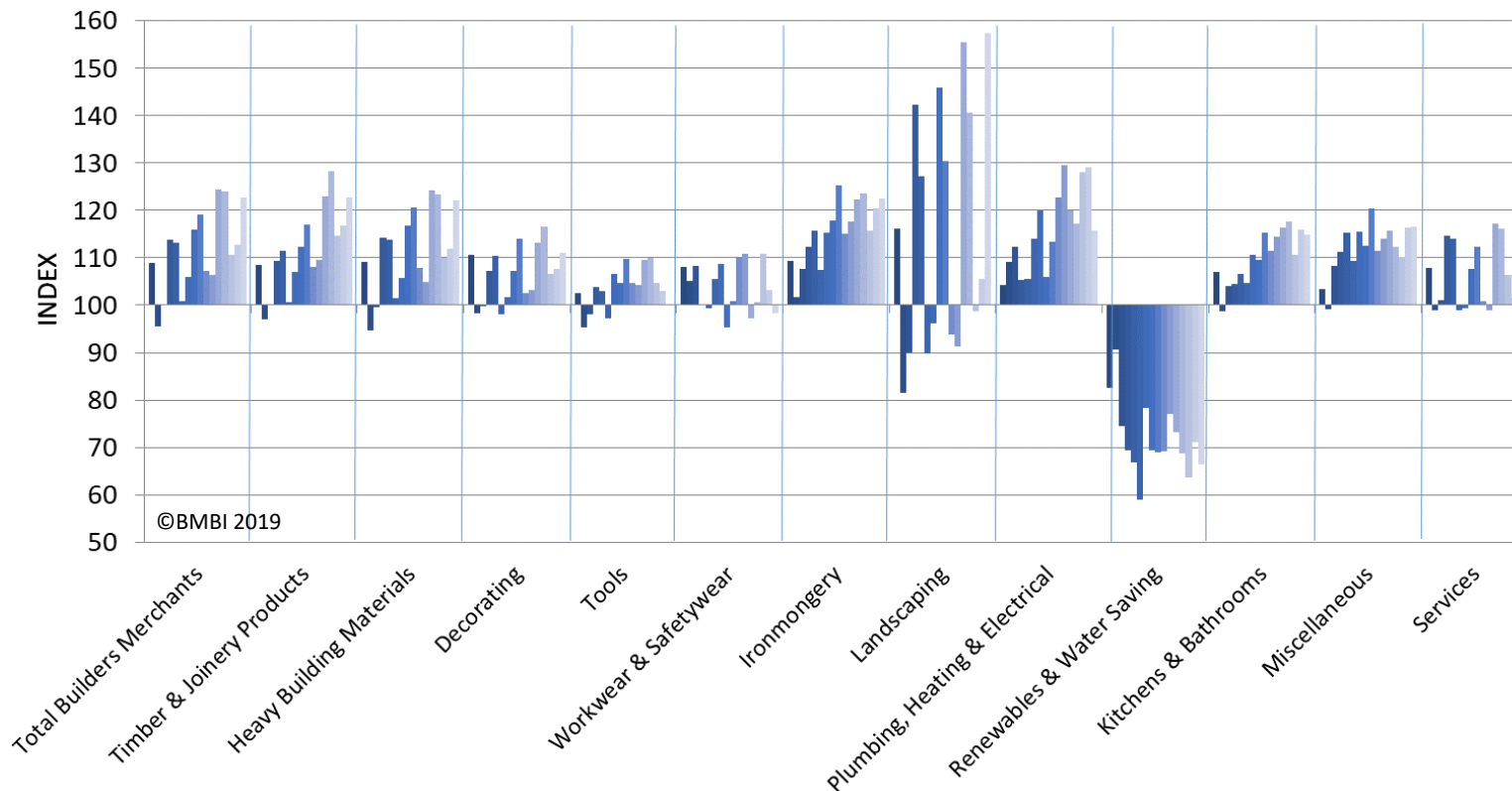
# Quarterly: Index and Categories


## Quarterly indices

### Quarterly Indices

Indexed on July 2014 to June 2015

Chart shows quarterly indices, by category, from Q3 2015 (darkest blue) to Q2 2019 (lightest blue)



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

# Quarterly: Sales Indices

## Adjusted and unadjusted for trading days

### Quarterly Indices: Year on Year

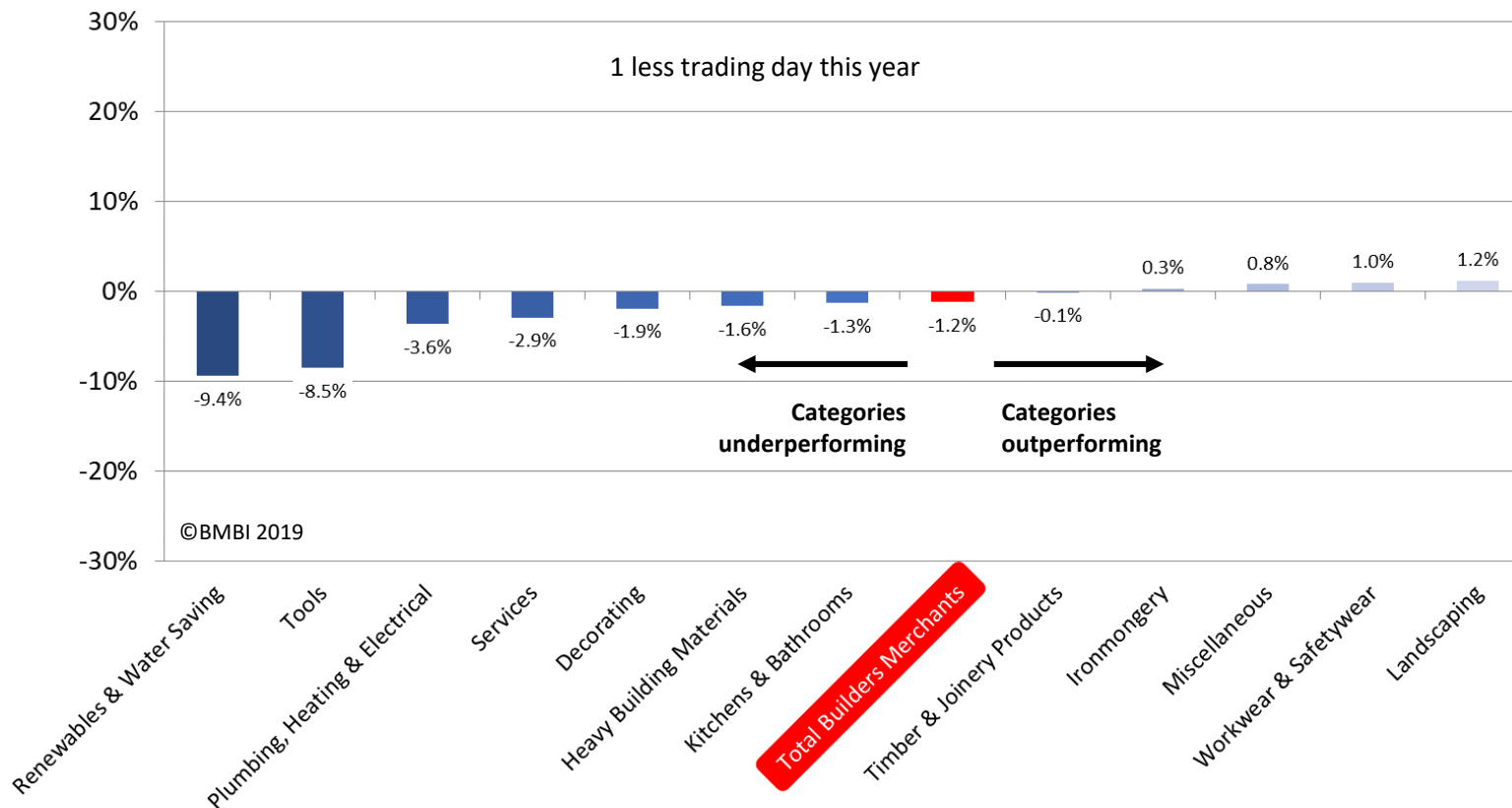


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2019

# Quarterly: This Year v Last Year

## Q2 2019 sales indices

### Quarter 2 2019 index v Quarter 2 2018 index

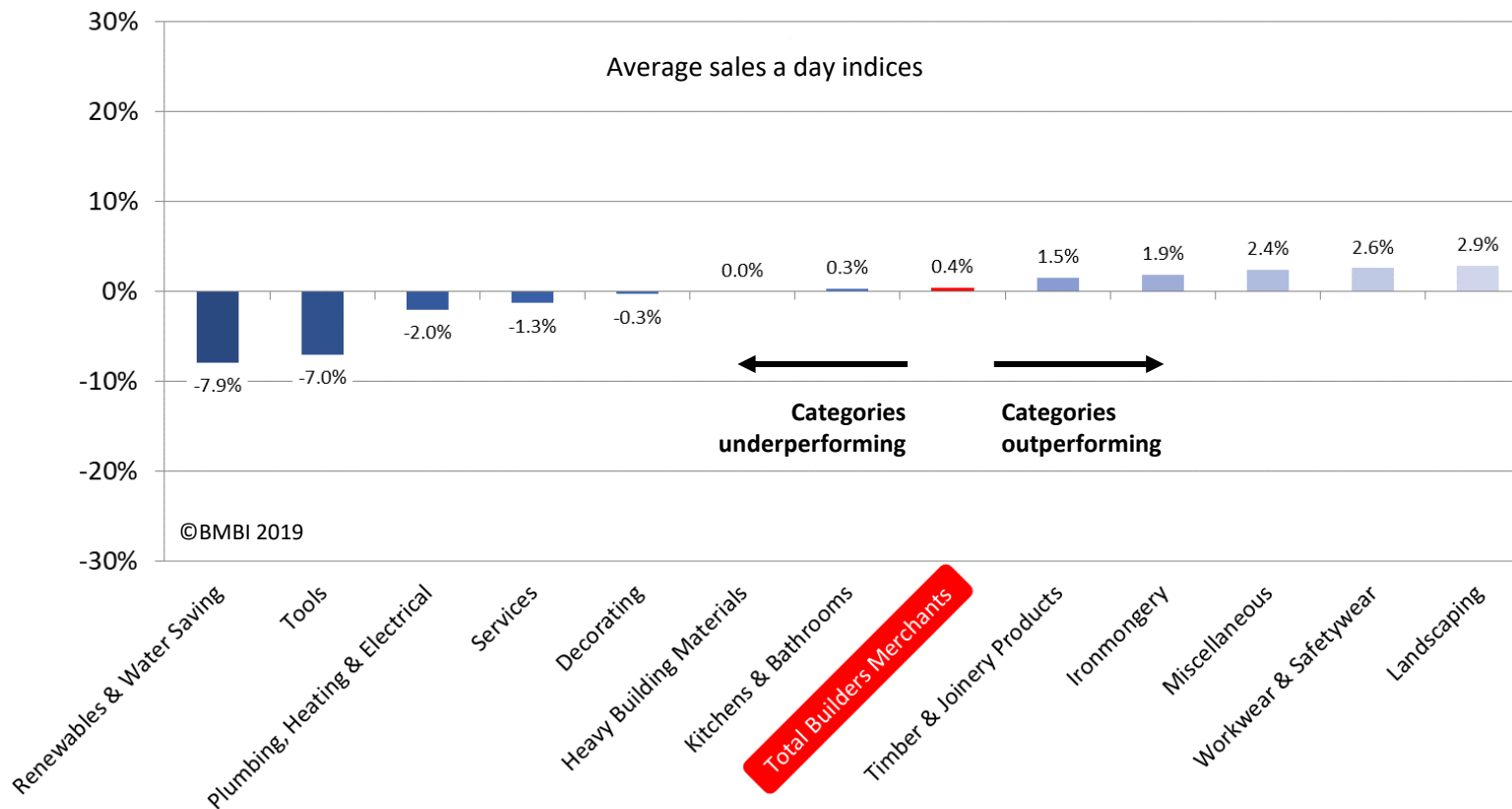


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2019

# Quarterly: This Year v Last Year

## Q2 2019 average sales a day indices

### Quarter 2 2019 index v Quarter 2 2018

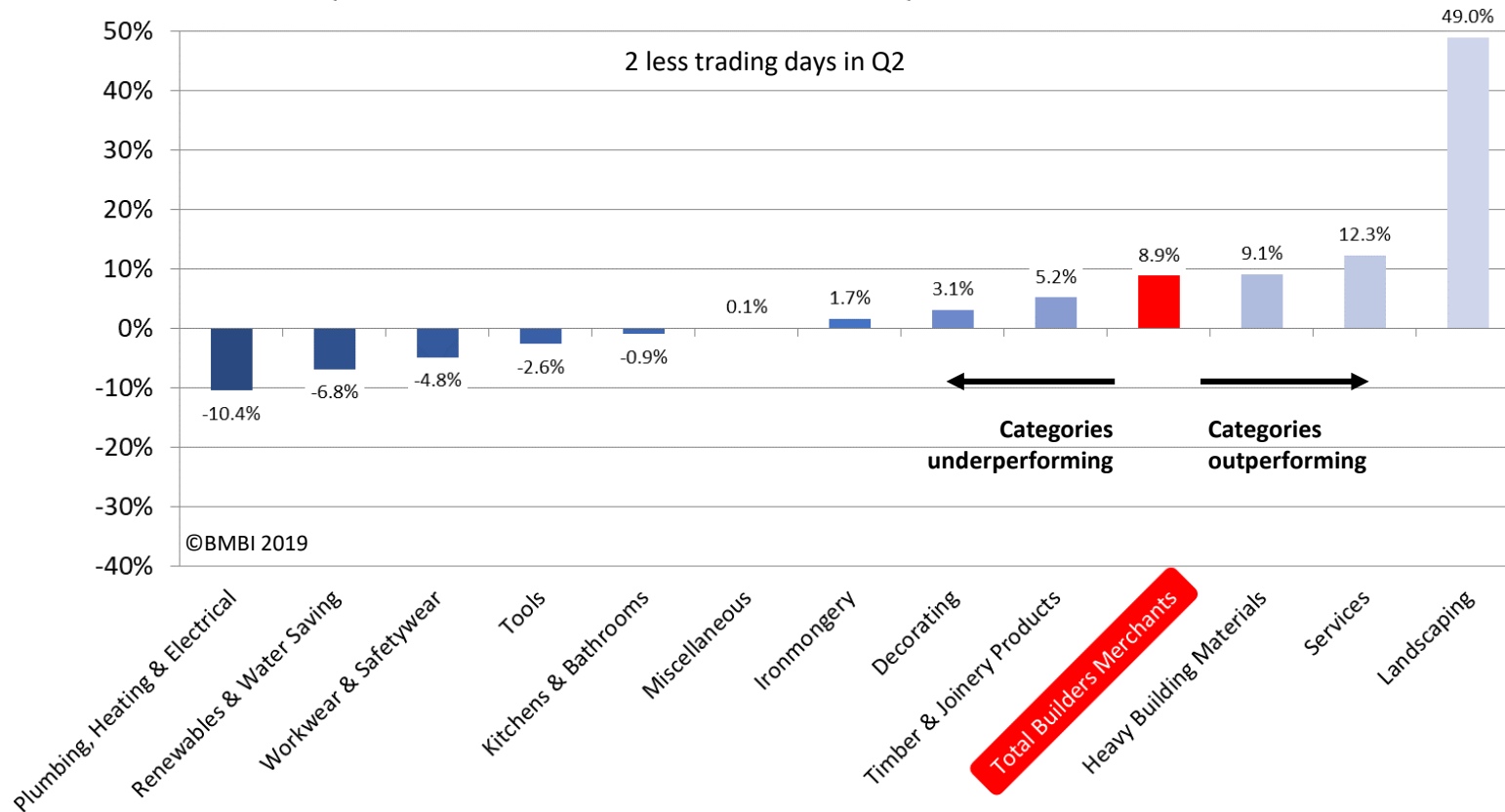


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2019

# Quarterly: Quarter on Quarter

## Q2 2019 sales indices

### Quarter 2 2019 index v Quarter 1 2019



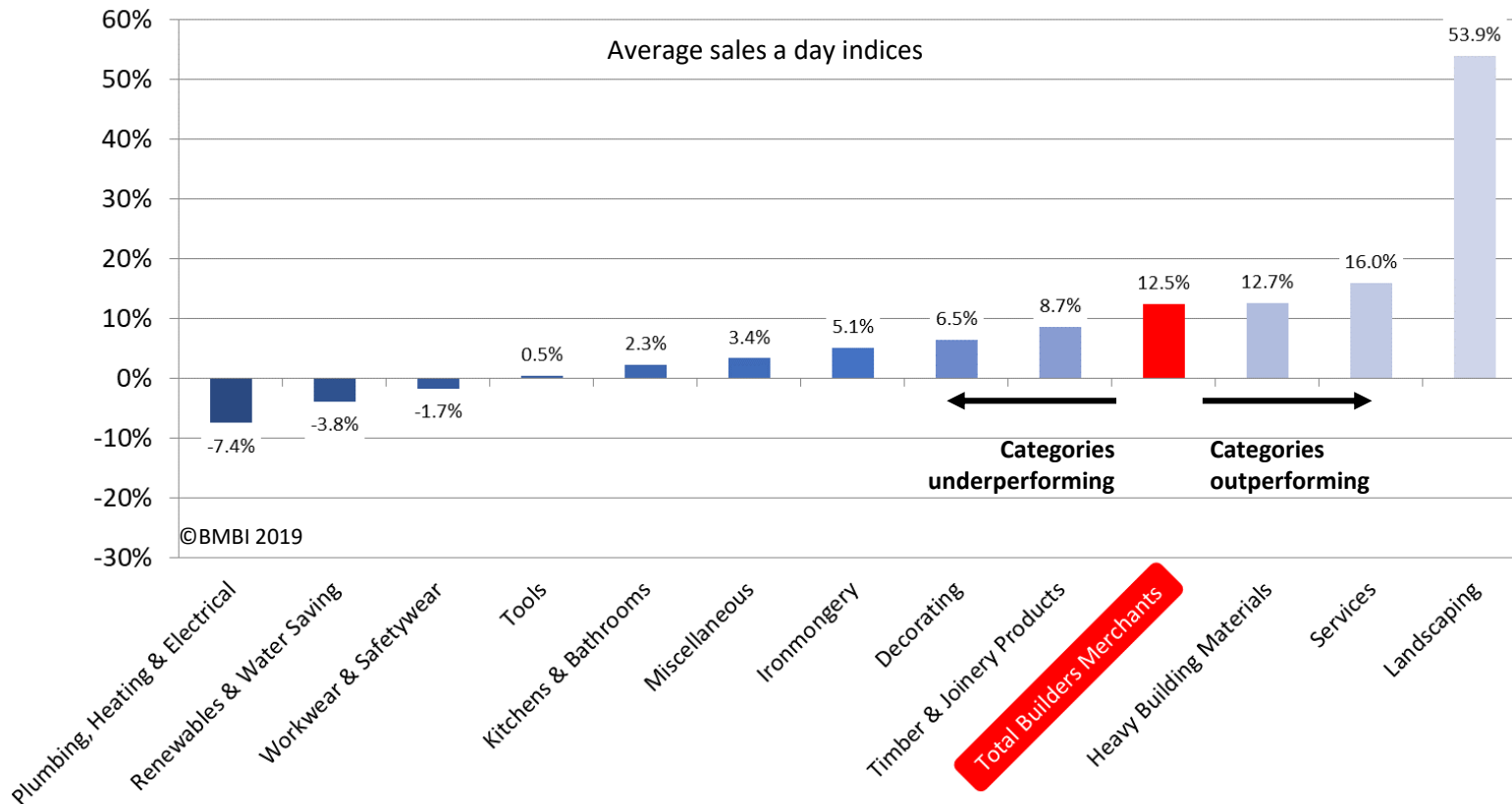
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2019



# Quarterly: Quarter on Quarter

## Average sales a day indices

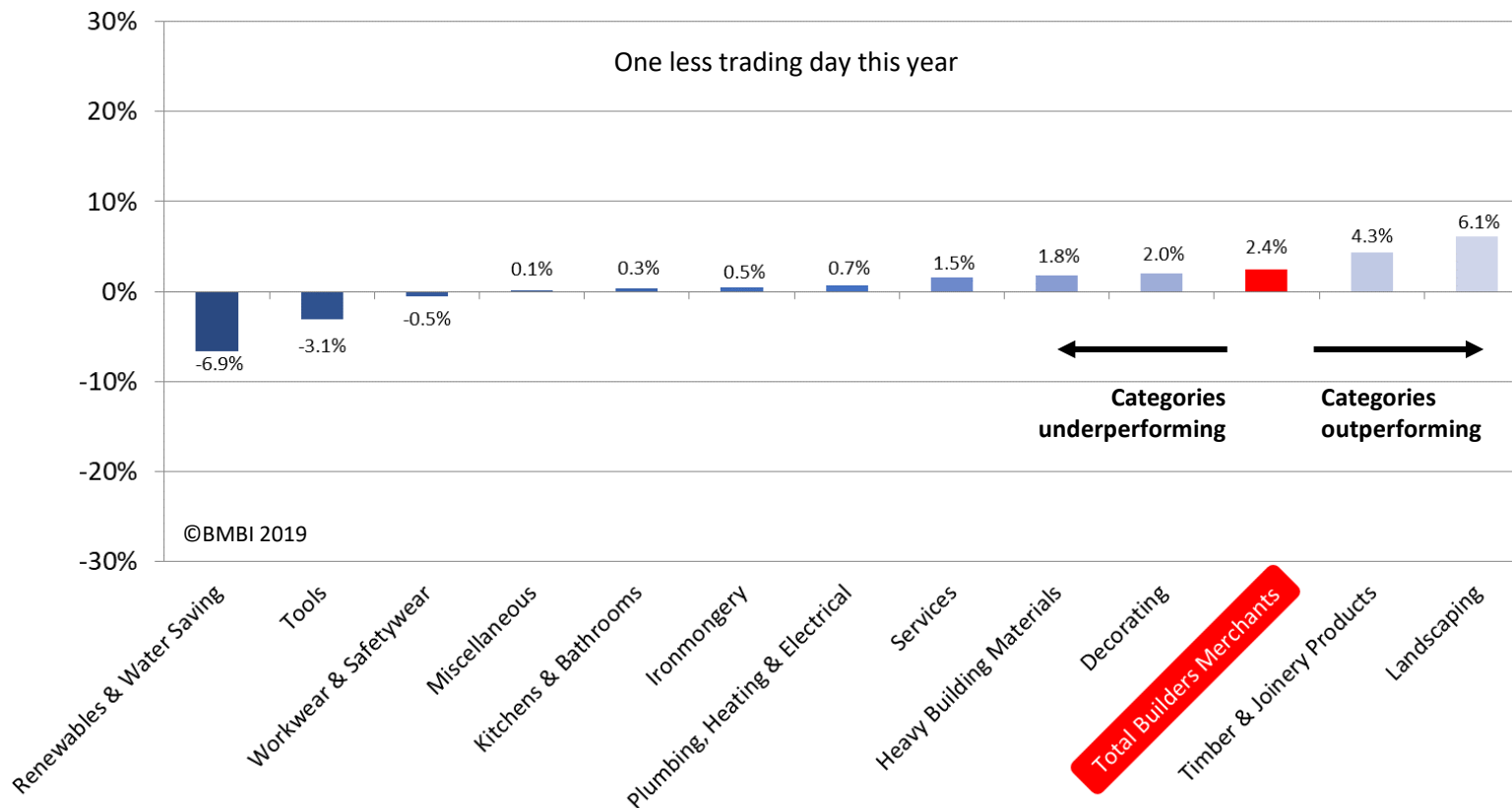
### Quarter 2 2019 Index v Quarter 1 2019



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

# Last 12 Months: Year on Year Rolling 12 months sales indices

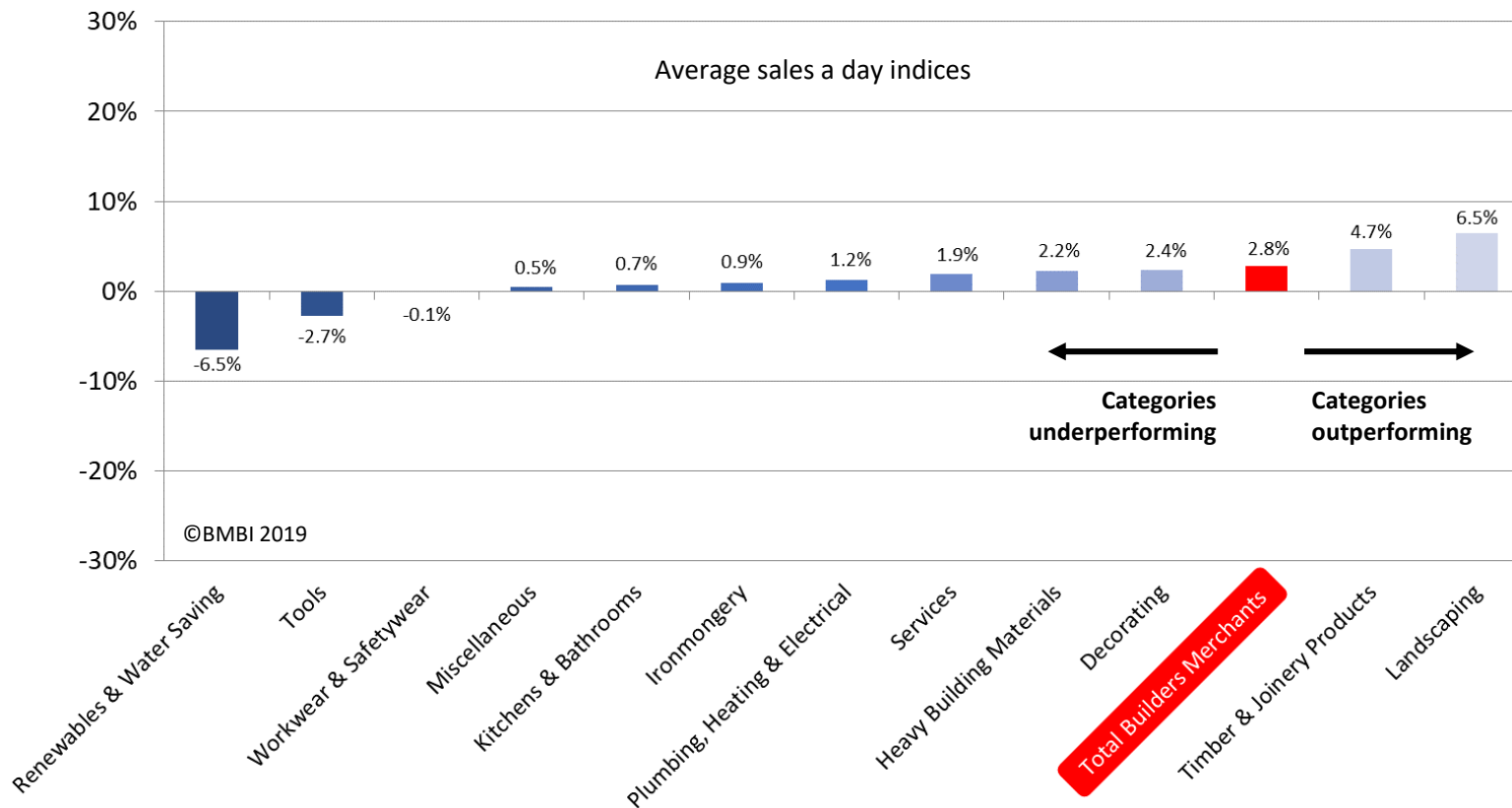
## 12 months Aug 18 to Jul 19 v 12 months Aug 17 to Jul 18



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

# Last 12 Months: Year on Year Rolling 12 months average sales a day indices

## 12 months Aug 18 to Jul 19 v 12 months Aug 17 to Jul 18

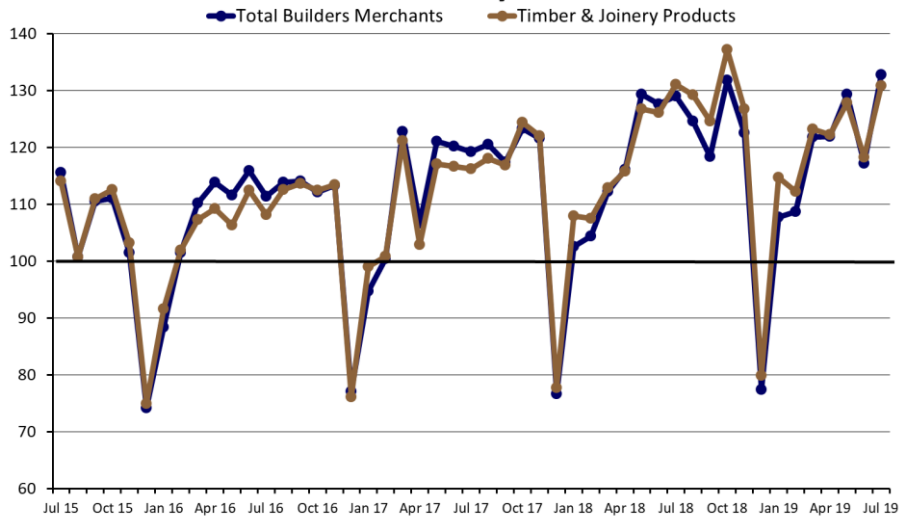


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: Indices

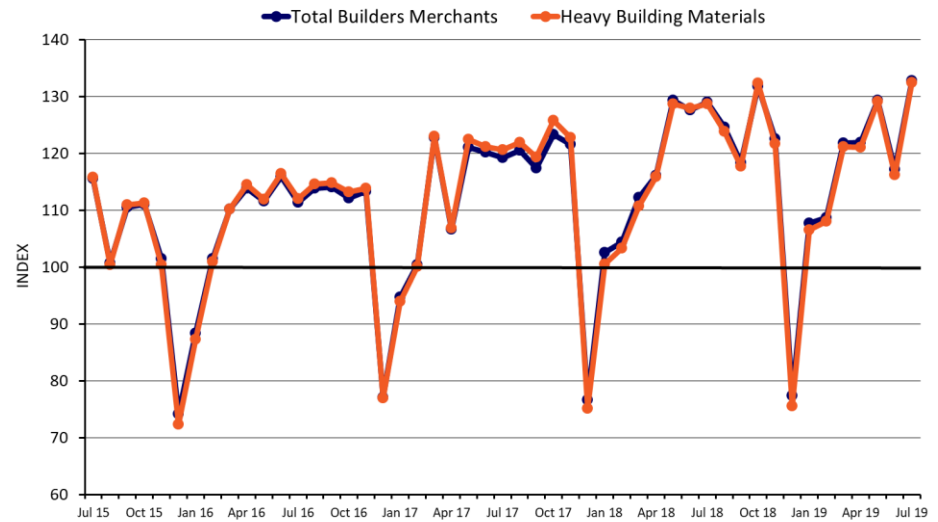
## July 2019

### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



Indexed on July 2014 – June 2015

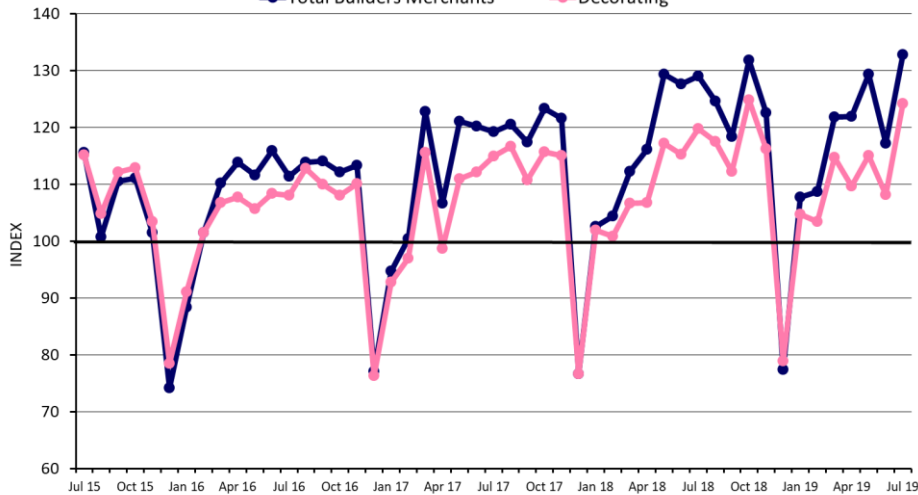
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: Indices

## July 2019

### Decorating

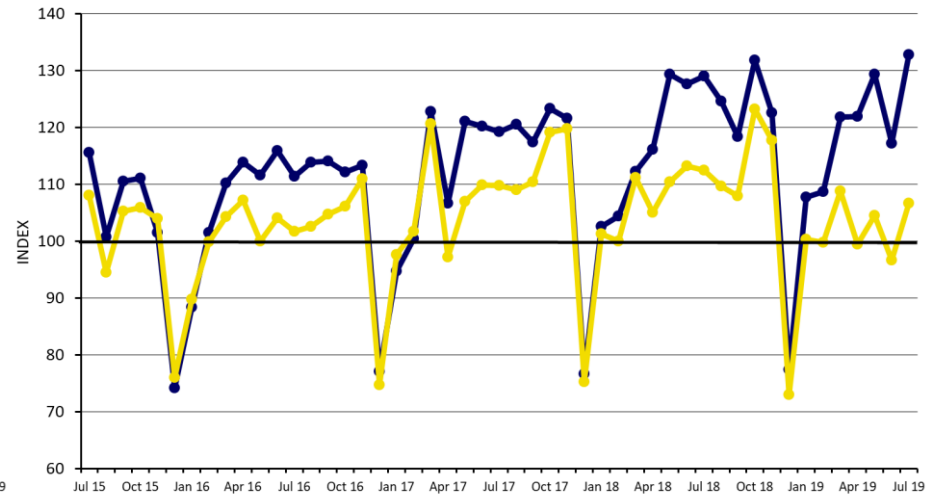
— Total Builders Merchants — Decorating



Indexed on July 2014 – June 2015

### Tools

— Total Builders Merchants — Tools

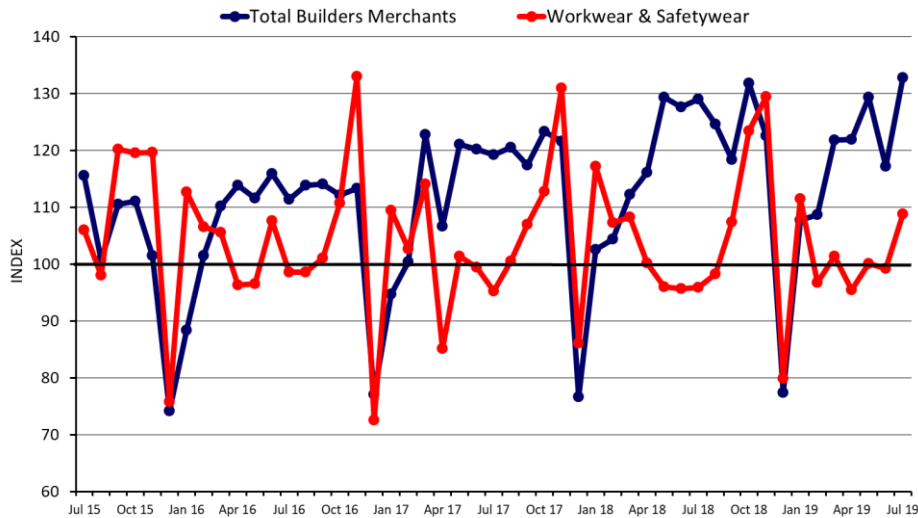


Indexed on July 2014 – June 2015

# Monthly: Indices

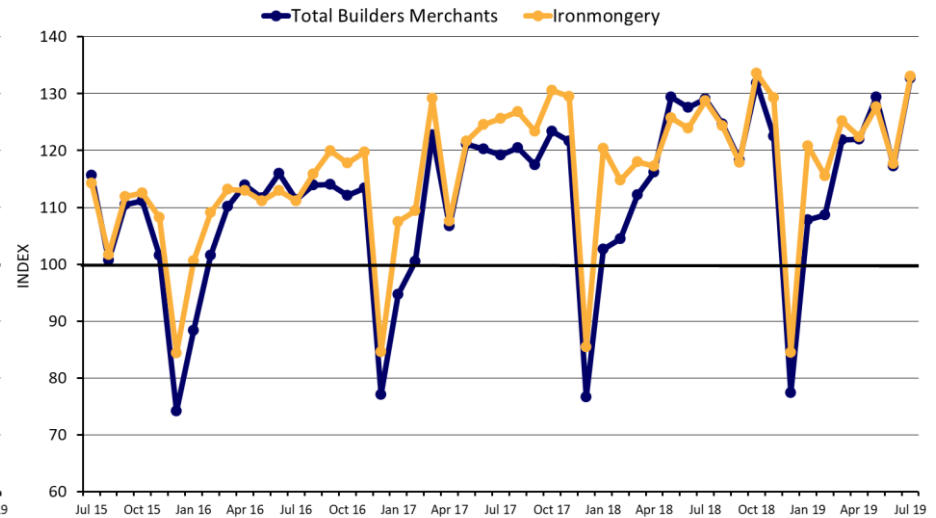
## July 2019

### Workwear & Safetywear




Indexed on July 2014 – June 2015

### Ironmongery



Indexed on July 2014 – June 2015

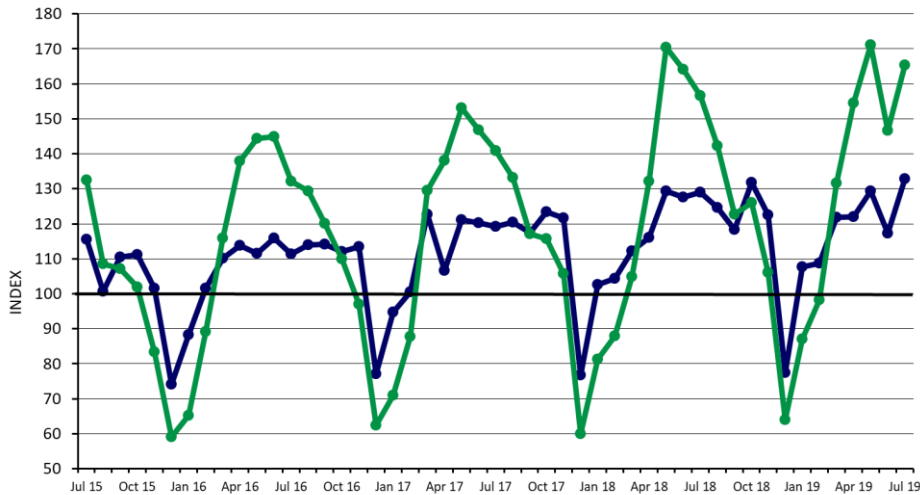
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: Indices

## July 2019

### Landscaping

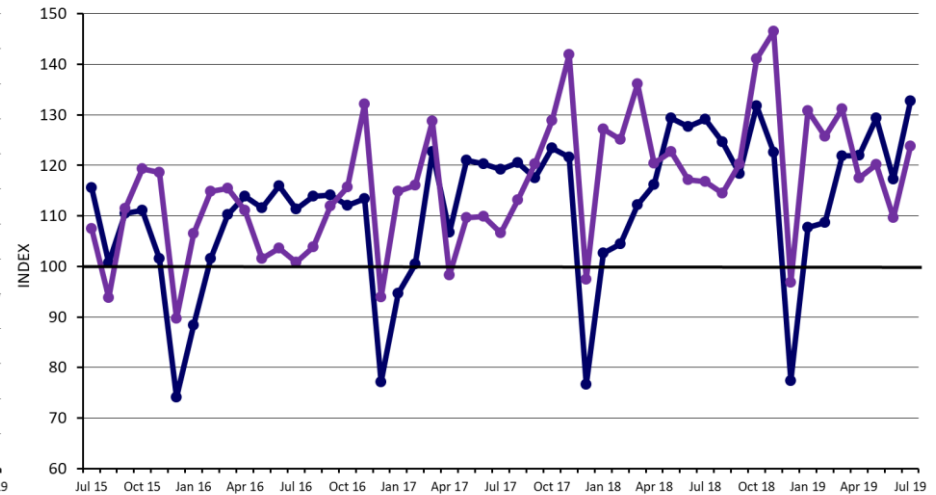
● Total Builders Merchants ● Landscaping



Indexed on July 2014 – June 2015

### Plumbing, Heating & Electrical

● Total Builders Merchants ● Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

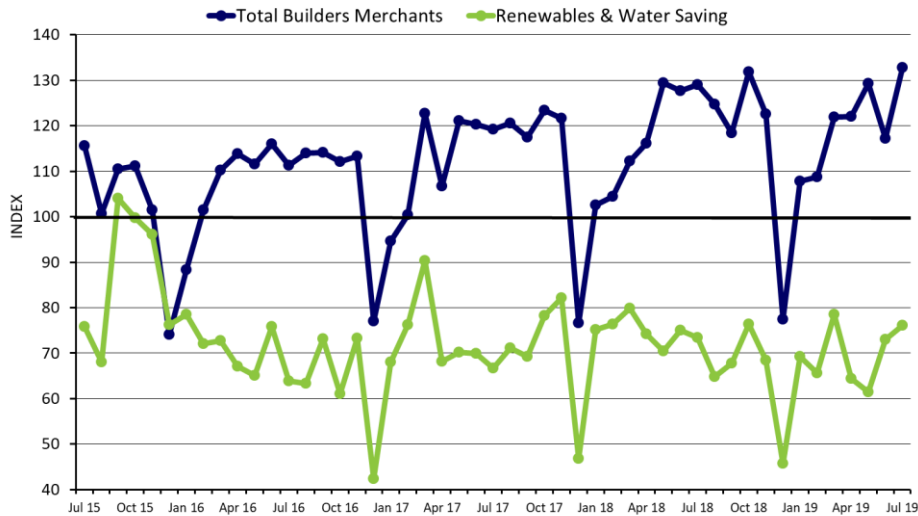
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019

# Monthly: Indices

## July 2019

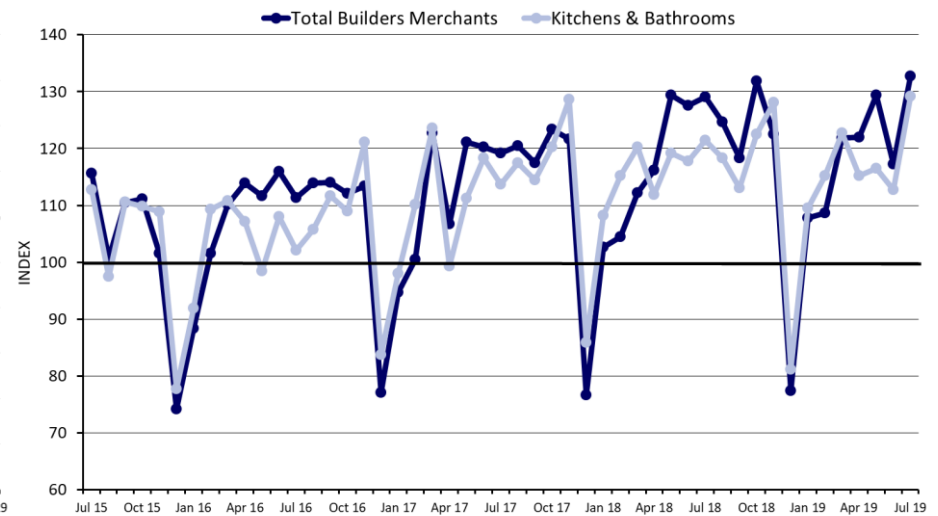


### Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms



Indexed on July 2014 – June 2015

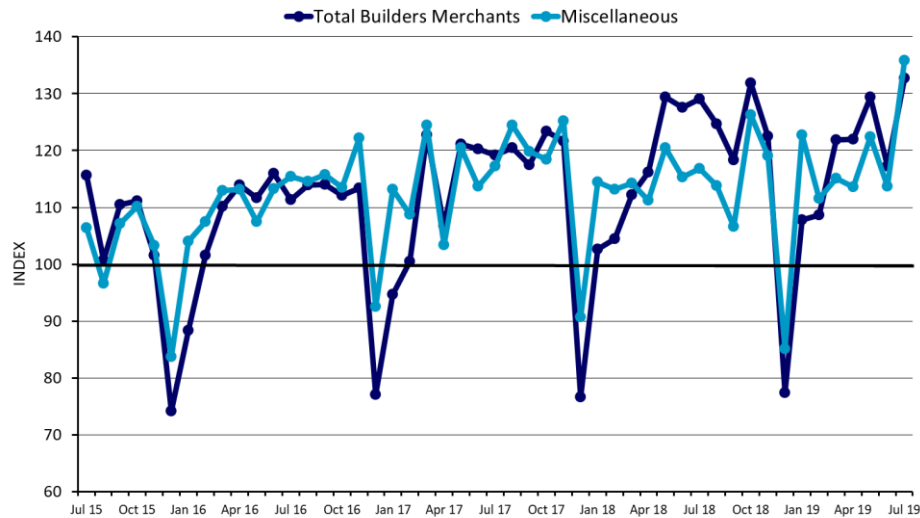
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2019



# Monthly: Indices

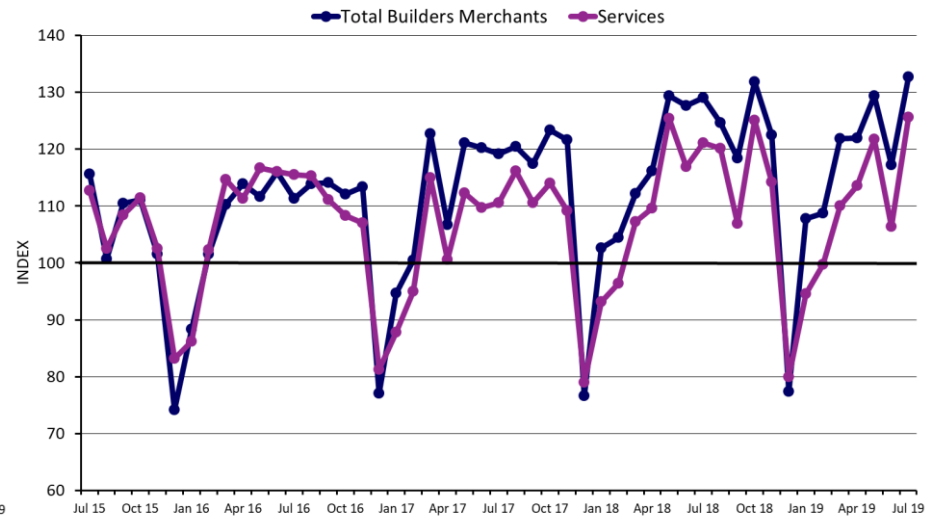
## July 2019

### Miscellaneous



Indexed on July 2014 – June 2015

### Services



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 July 2019

# Trading Days



Monthly												Quarterly				Half Year		Full Year
Index: 20.8												Index: 62.4				Index: 125		Index: 250
2015												2015						
						Jul	Aug	Sep	Oct	Nov	Dec							
						22	20	22	22	21	17							
2016												2016				2016		2016
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	H1	H2	250
20	21	21	21	20	22	21	22	22	21	22	17	62	63	65	60	125	125	
2017												2017				2017		2017
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	H1	H2	249
21	20	23	18	21	22	21	22	21	22	22	16	64	61	64	60	125	124	
2018												2018				2018		2018
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	H1	H2	249
22	20	21	20	21	21	22	22	20	22	22	16	63	62	64	60	125	124	
2019												2019				2019		2019
Jan	Feb	Mar	Apr	May	Jun	Jul						Q1	Q2			H1	H2	124
22	20	21	20	21	20	23						63	61			124		

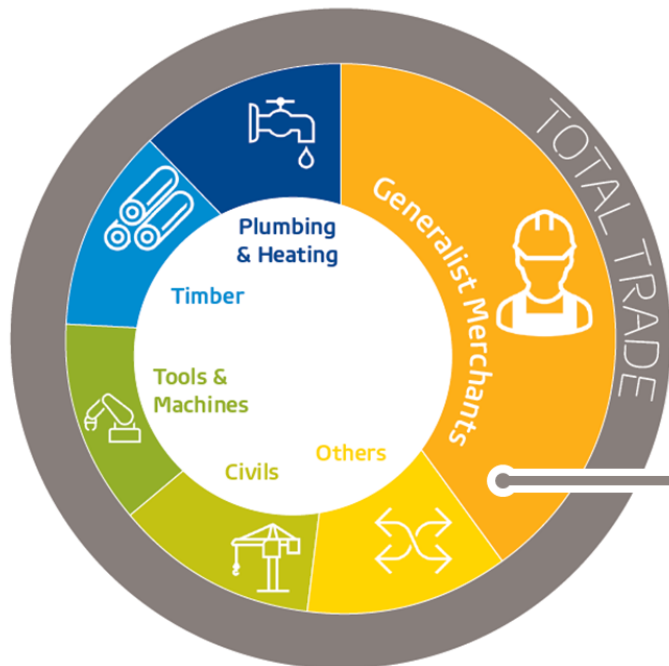

 Source: GfK's  
 Builders Merchants  
 Total Category Report  
 July 2015 to July 2019

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



### The Multiple Generalist Builders Merchants Channel



#### Generalist Builders Merchants

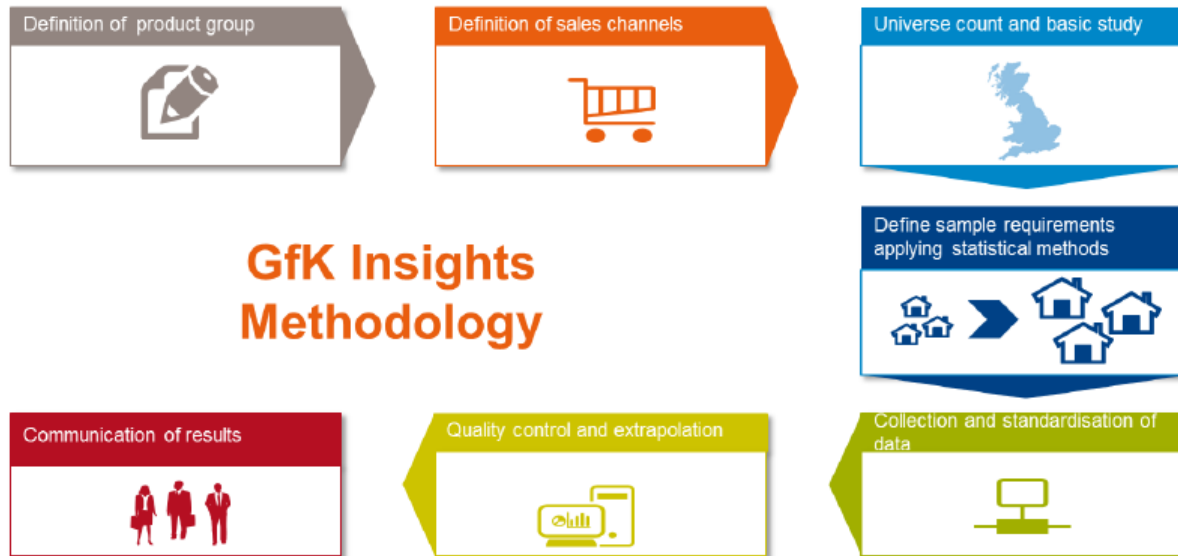
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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 Pete Church at GfK ([pete.church@gfk.com](mailto:pete.church@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](mailto: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

For further information



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