

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for August 2019

Building the Industry & Building Brands from Knowledge



Contents - 1

Click links below to visit pages

Click links to visit pages:	Page
Introduction	5
Overview	6
BMBI Expert Panel	7-8
Monthly data:	
Monthly BMBI indices, by category	9
Monthly index chart, unadjusted and adjusted for trading day differences	10
August index chart, by category	11
Monthly year-on-year chart, unadjusted and adjusted for trading day differences	12
August year-on-year sales index chart, by category	13
August year-on-year average sales a day index chart, by category	14
August v July sales index chart, by category	15
August v July average sales a day index chart, by category	16
Quarterly data:	
Quarterly BMBI indices, by category	17
Quarter 2 index chart, unadjusted and adjusted for trading day differences	18
Quarter 2 index chart, by category	19
Quarterly indices, by category	20
Quarter 2 year-on-year chart, unadjusted and adjusted for trading day differences	21
Quarter 2 year-on-year sales index chart, by category	22
Quarter 2 year-on-year average sales a day index chart	23
Quarter 2 v Quarter 1 sales index chart, by category	24
Quarter 2 v Quarter 1 average sales a day index chart, by category	25

Click links on this page and overleaf to visit pages. The 'Contents' link in the footer brings you back to this page.

Continued over the page...

Contents - 2

Continued: click links below to visit pages



Click links to visit pages:	Page
Full Year data:	
Rolling 12 months compared with previous 12 months chart, by category	26
Latest 12 months average sales a day compared with previous 12 months chart, by category	27
Monthly Category Charts:	
Timber & Joinery Products	28
Heavy Building Materials	28
Decorating	29
Tools	29
Workwear & Safetywear	30
Ironmongery	30
Landscaping	31
Plumbing Heating & Electrical	31
Renewables & Water Saving	32
Kitchens & Bathrooms	32
Miscellaneous	33
Services	33
Trading days	34
Methodology	35 – 37
BMF Forecast Report	38
Contacts	39

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:** Includes a photo of John Cox, Commercial Director at Alumasac, and text 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.

Overview

Merchants' sales fall as Brexit deadline nears

After a strong start to the year, growing uncertainty around Brexit led to a marked slowdown in merchants' sales in Q2. As the deadline looms closer it's clear that the uncertainty continues to impact negatively on merchants' sales.

Year-on-Year

Total Builders Merchants' sales in August 2019 were down 5.6% compared with the same period in 2018. On a like-for-like basis, with one less trading day, average sales a day were only 1.1% down. The best performing sector in August was Kitchens & Bathrooms, which increased by 3.0% year-on-year, on an adjusted basis.

Other sectors which recorded positive growth on an equal number of trading days included Plumbing, Heating & Electrical (+2.3%), Workwear & Safetywear (+1.8%) and Ironmongery (+1.5%). Average sales a day fell back in Timber & Joinery (-5.2%), Tools (-7.1%) and Heavy Building Materials (-0.8%).

Month-on-Month

Total August 2019 sales were down by 11.4% compared with the previous month. However, when adjusted for the two-day trading difference, sales were down 2.9%. Landscaping (-9.5%), Timber & Joinery (-2.1%) and Heavy Building Materials (-3%) were significantly down. All product categories saw sales decrease in August compared to July.

Other periods

Sales in the rolling 12 months September 2018 to August 2019 were up 1.6% on the same period last year. Year-to-date sales also remained positive at 1.2% compared to August 2018.

Index

August's BMBI index was 117.7, with Landscaping the highest category at 136.7.

Total Builders Merchants sales in August 2019 were down 5.6% compared with the same period in 2018. On a like-for-like basis, the decline was 1.1%.

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



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



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



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



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

August 2018* – August 2019

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



		2018					2019							
MONTHLY SALES VALUE INDEX	Index	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug
Total Builders Merchants	100	124.7	118.4	131.8	122.5	77.4	107.8	108.7	121.9	122.0	129.3	117.2	132.8	117.7
Timber & Joinery Products	100	129.3	124.7	137.2	126.8	79.9	114.7	112.2	123.3	122.3	127.9	118.3	130.9	117.0
Heavy Building Materials	100	123.9	117.8	132.4	121.8	75.6	106.6	108.1	121.2	121.1	129.2	116.2	132.5	117.3
Decorating	100	117.5	112.3	124.8	116.3	78.9	104.7	103.4	114.8	109.7	115.1	108.1	124.2	113.2
Tools	100	109.7	108.0	123.2	117.8	73.0	100.3	99.8	108.8	99.5	104.5	96.7	106.7	97.3
Workwear & Safetywear	100	98.3	107.5	123.5	129.5	79.9	111.5	96.8	101.5	95.5	100.1	99.3	108.8	95.5
Ironmongery	100	124.4	117.9	133.6	129.3	84.5	120.8	115.5	125.2	122.5	127.6	117.7	133.1	120.6
Landscaping	100	142.4	122.8	126.0	106.1	64.0	87.1	98.2	131.6	154.5	171.1	146.6	165.4	136.7
Plumbing, Heating & Electrical	100	114.5	120.4	141.1	146.5	96.9	130.8	125.7	131.2	117.6	120.2	109.7	123.8	111.8
Renewables & Water Saving	100	64.8	67.8	76.4	68.5	45.8	69.3	65.7	78.5	64.5	61.4	73.1	76.1	78.0
Kitchens & Bathrooms	100	118.4	113.0	122.5	128.2	81.2	109.5	115.3	122.8	115.2	116.5	112.7	129.2	116.4
Miscellaneous	100	113.9	106.6	126.3	119.1	85.1	122.7	111.6	115.1	113.6	122.5	113.7	135.8	118.5
Services	100	120.1	106.9	125.1	114.2	79.9	94.5	99.7	110.0	113.6	121.8	106.4	125.6	116.0

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

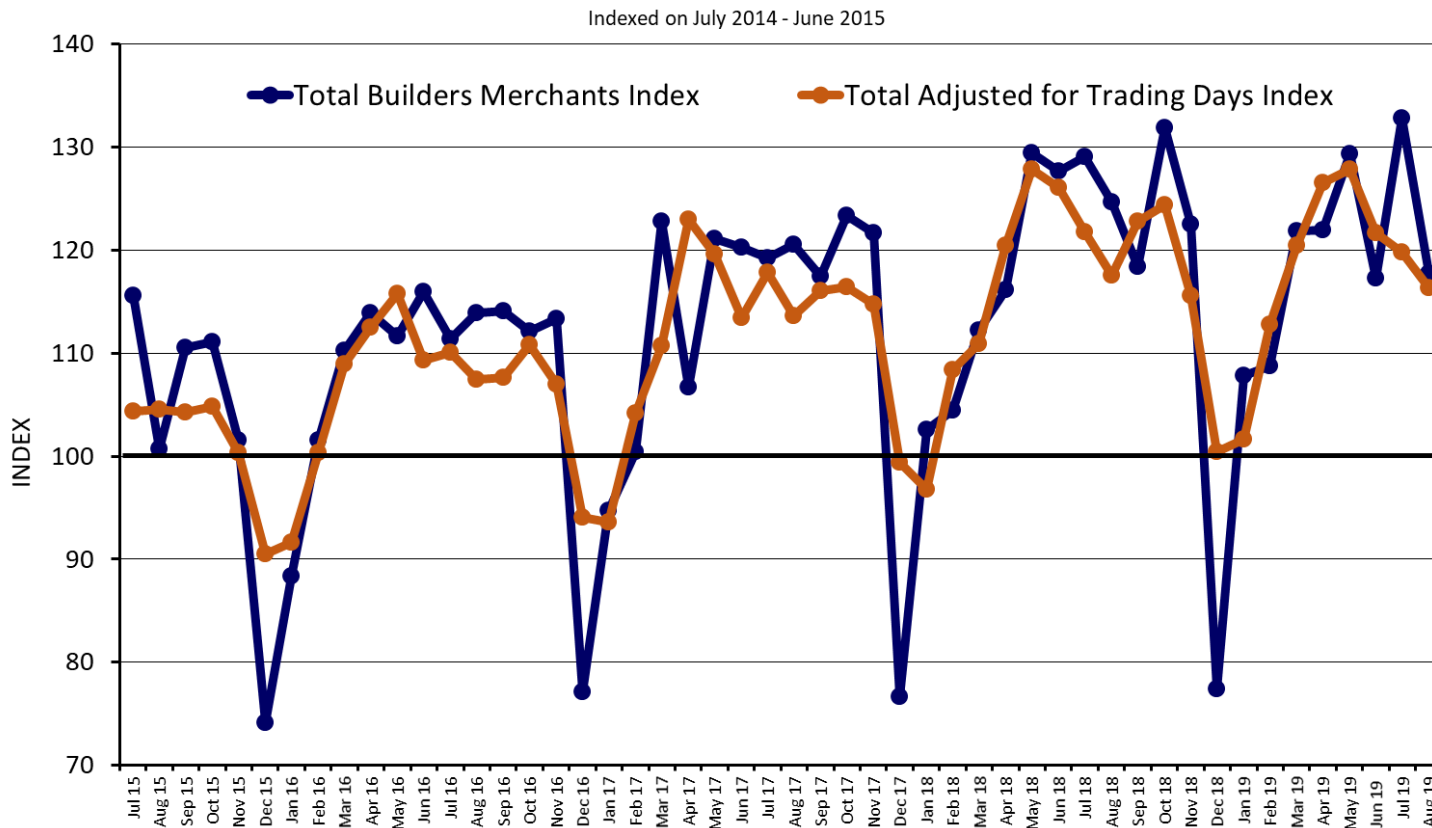
NB: The April 2019 index for services has been updated following a data submission revision.

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

Monthly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



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

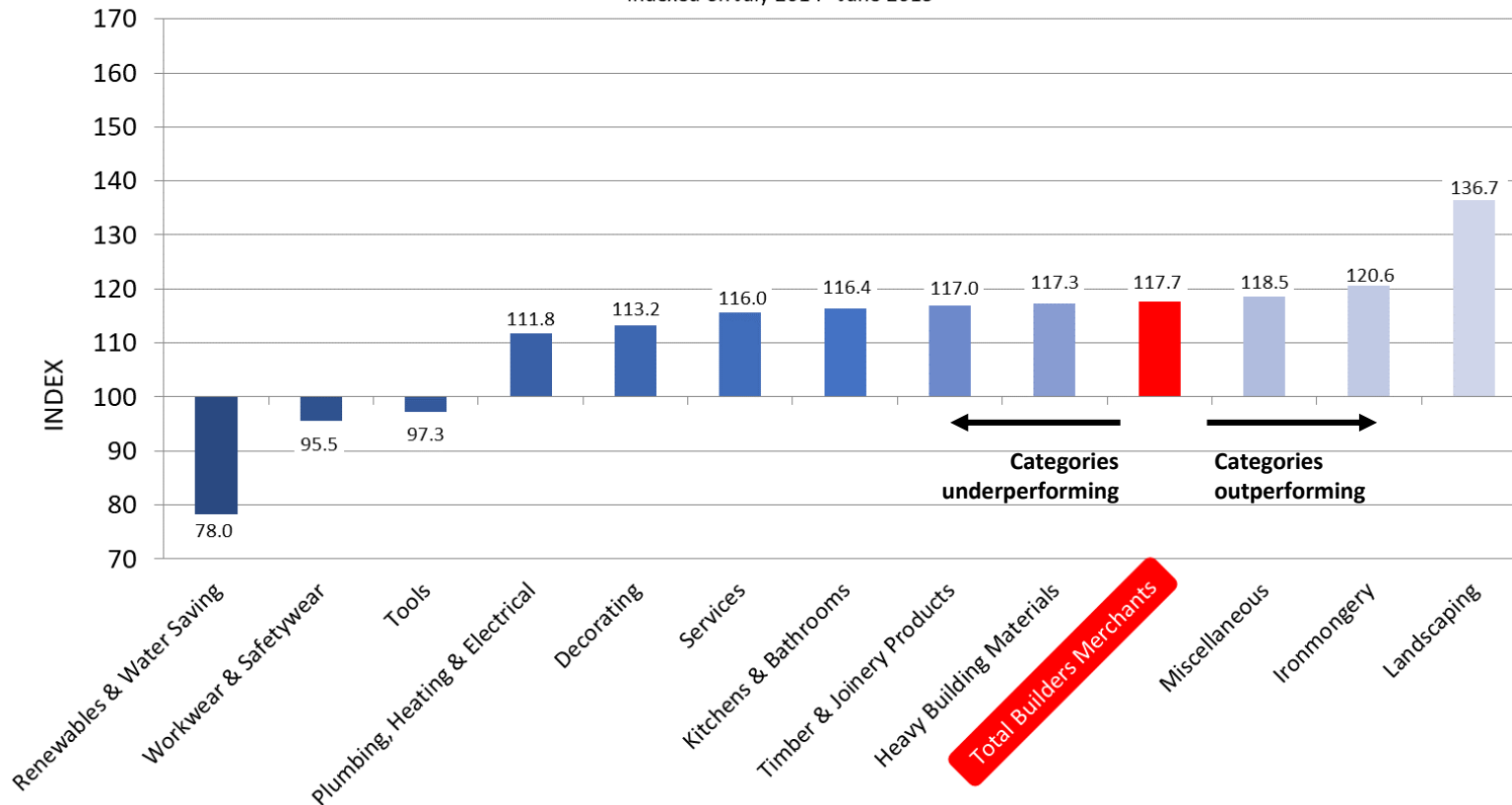
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: Index and Categories

August 2019 index

August 2019 Index

Indexed on July 2014 - June 2015

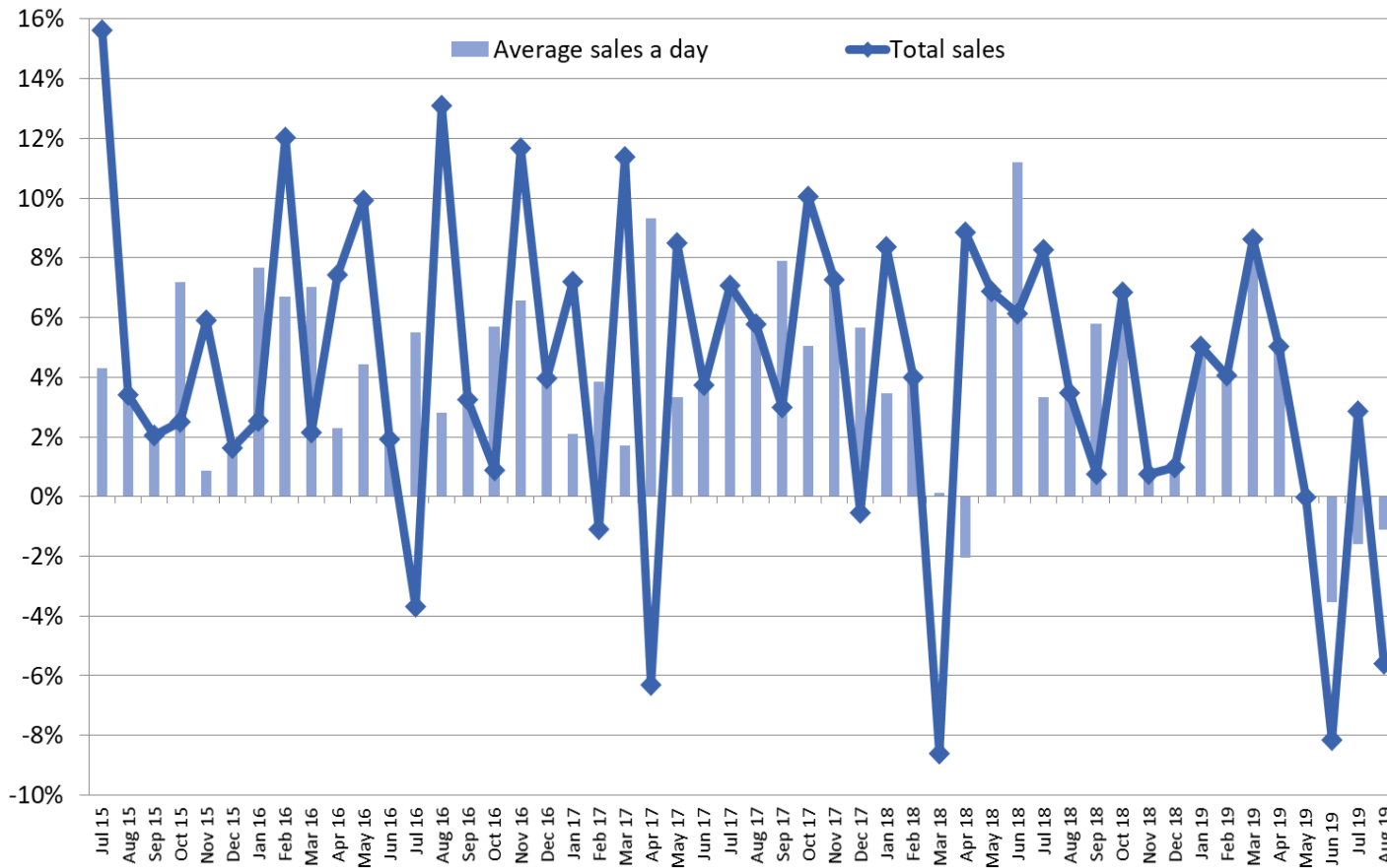


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: Sales Indices

Adjusted and unadjusted for trading days

Monthly: Year on Year



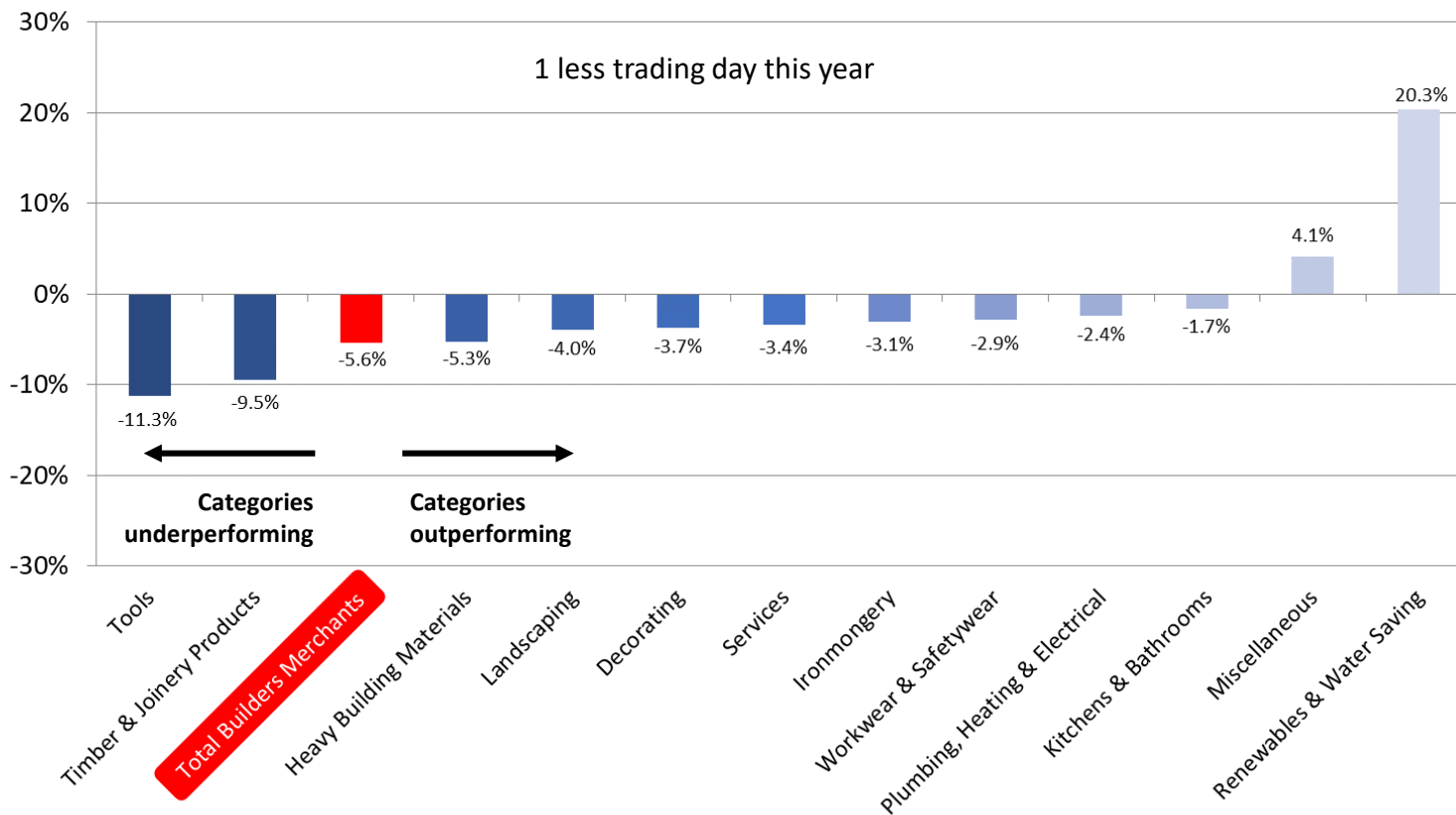
For number of trading days, see [Slide 34](#)

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

Monthly: This Year v Last Year

August 2019 sales indices

August 2019 index v August 2018 index

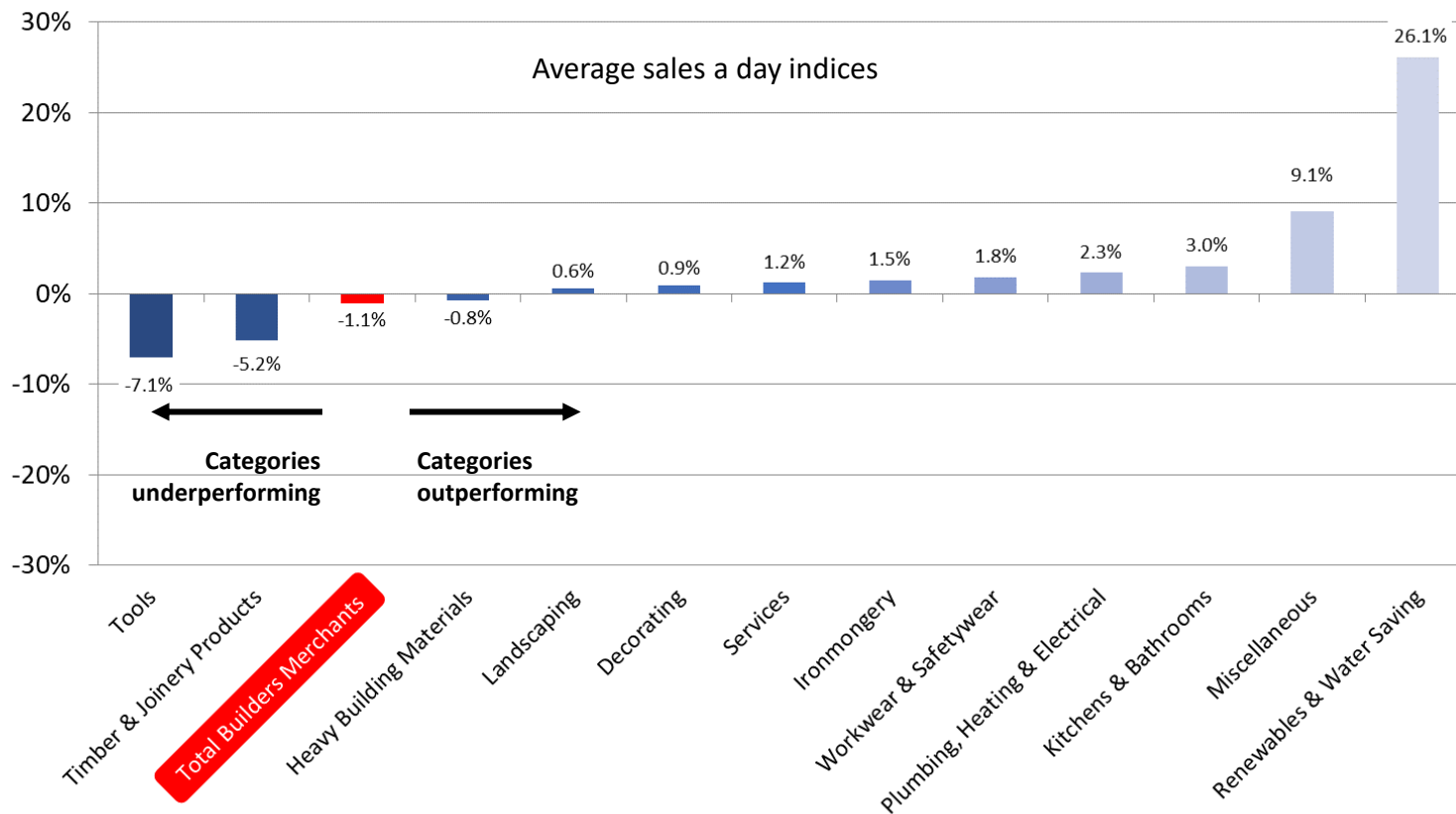


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: This Year v Last Year

August 2019 average sales a day indices

August 2019 index v August 2018 index

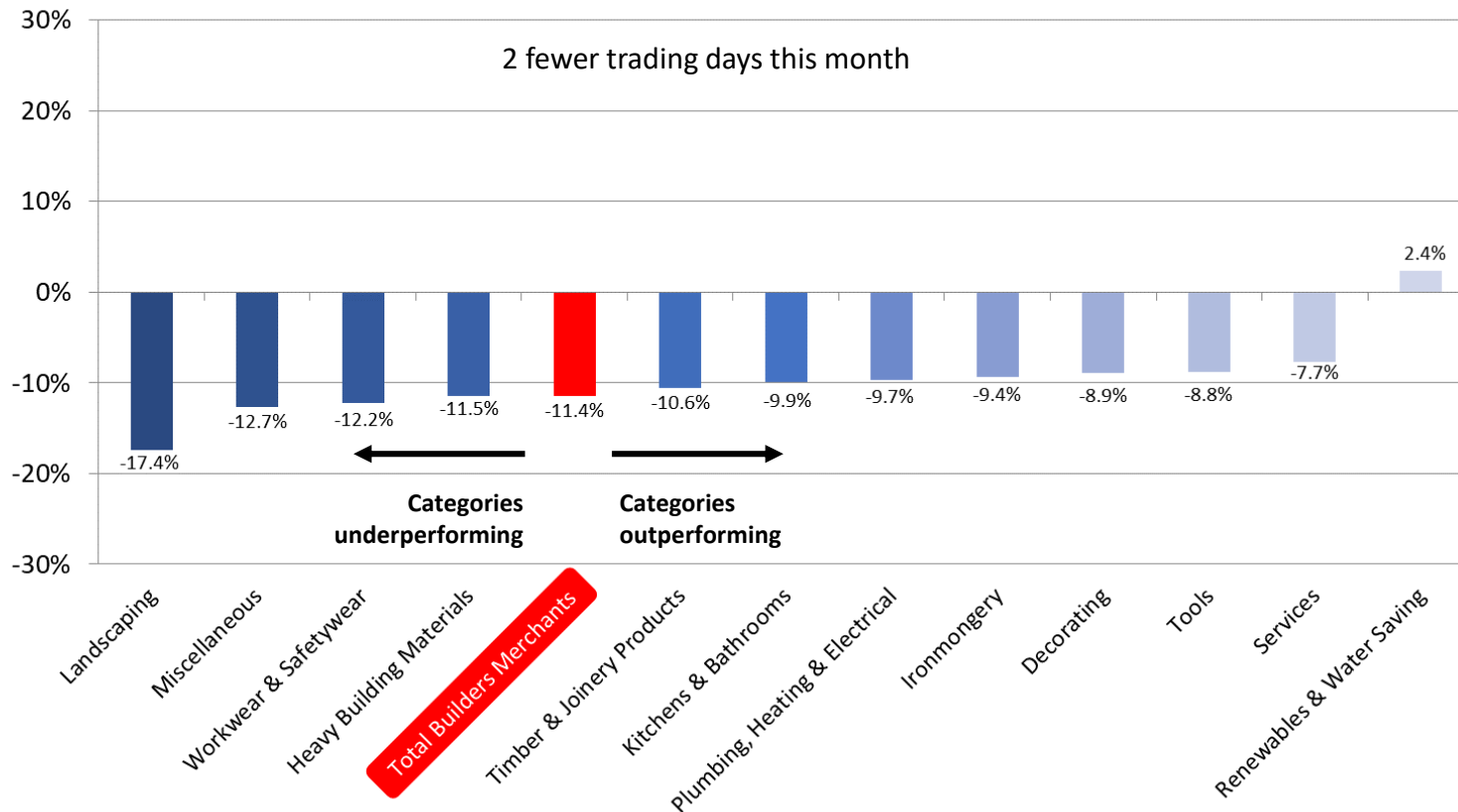


GfK Source: GfK's Builders Merchants Total Category Report July 2015 to August 2019

Monthly: This Month v Last Month

August 2019 sales indices

August 2019 index v July 2019 index

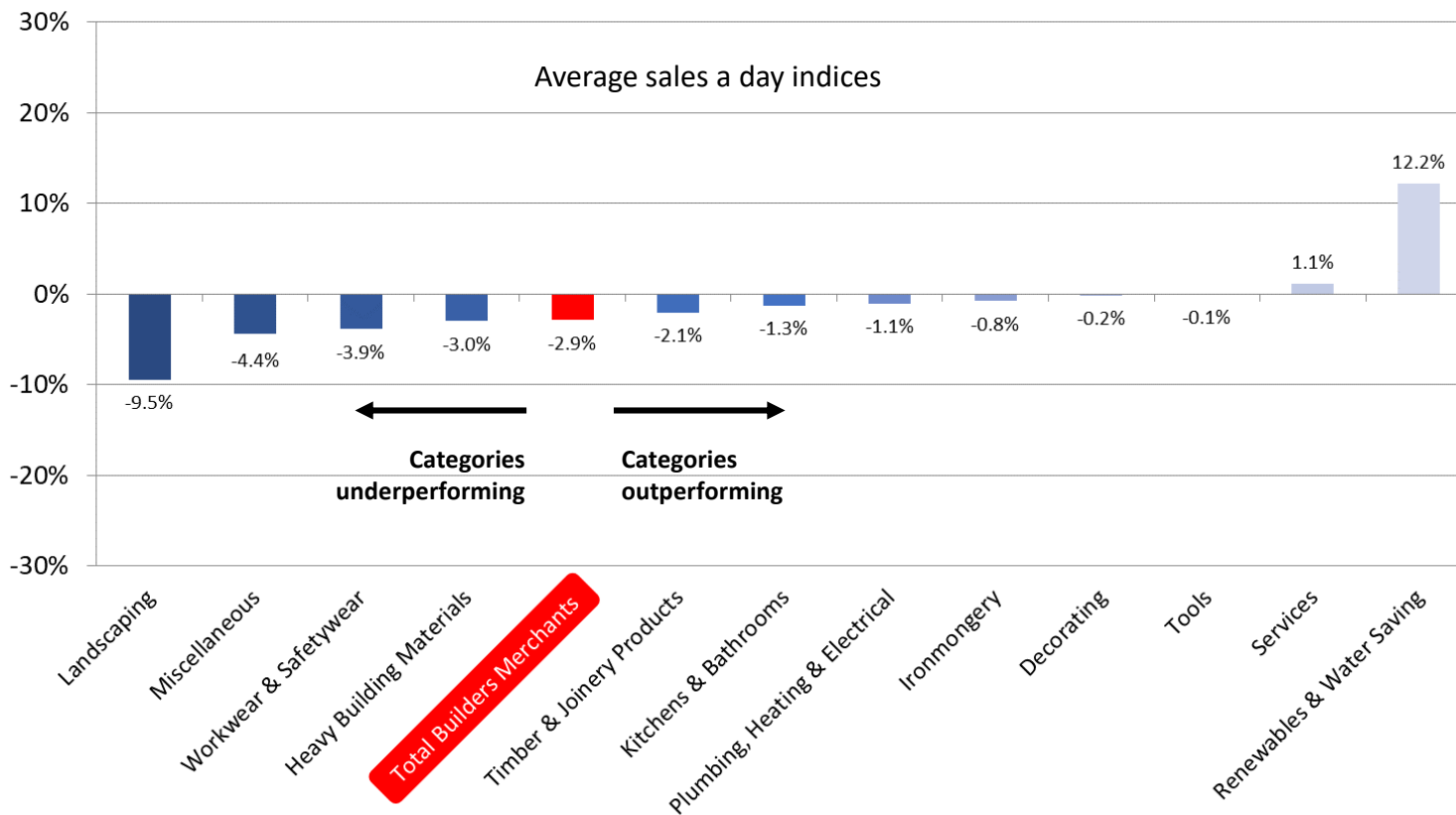


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: This Month v Last Month

August 2019 average sales a day indices

August 2019 index v July 2019 index



 Source: GfK's Builders Merchants Total Category Report July 2015 to August 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
Total Builders Merchants	100	124.4	124.0	110.6	112.7	122.9
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

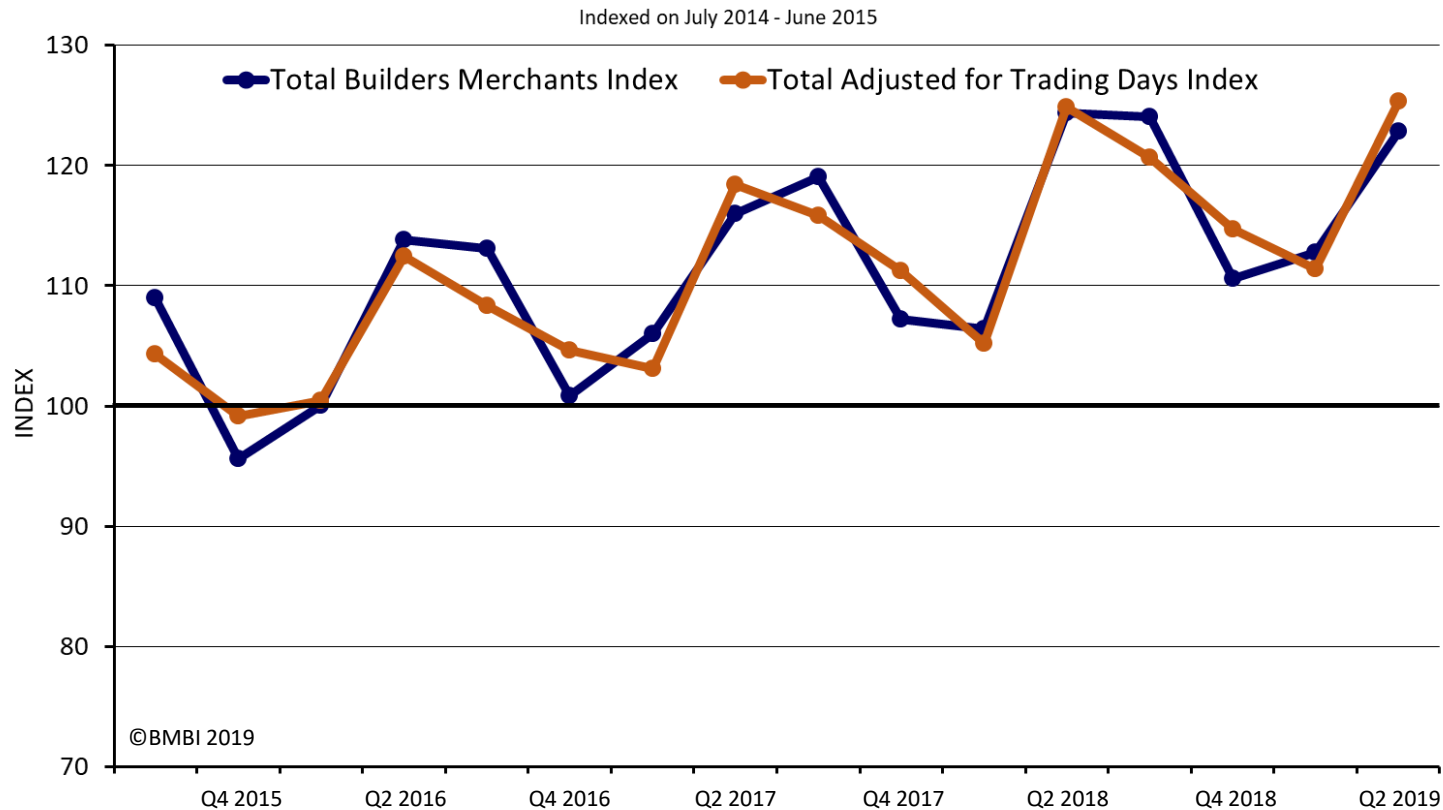
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

 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



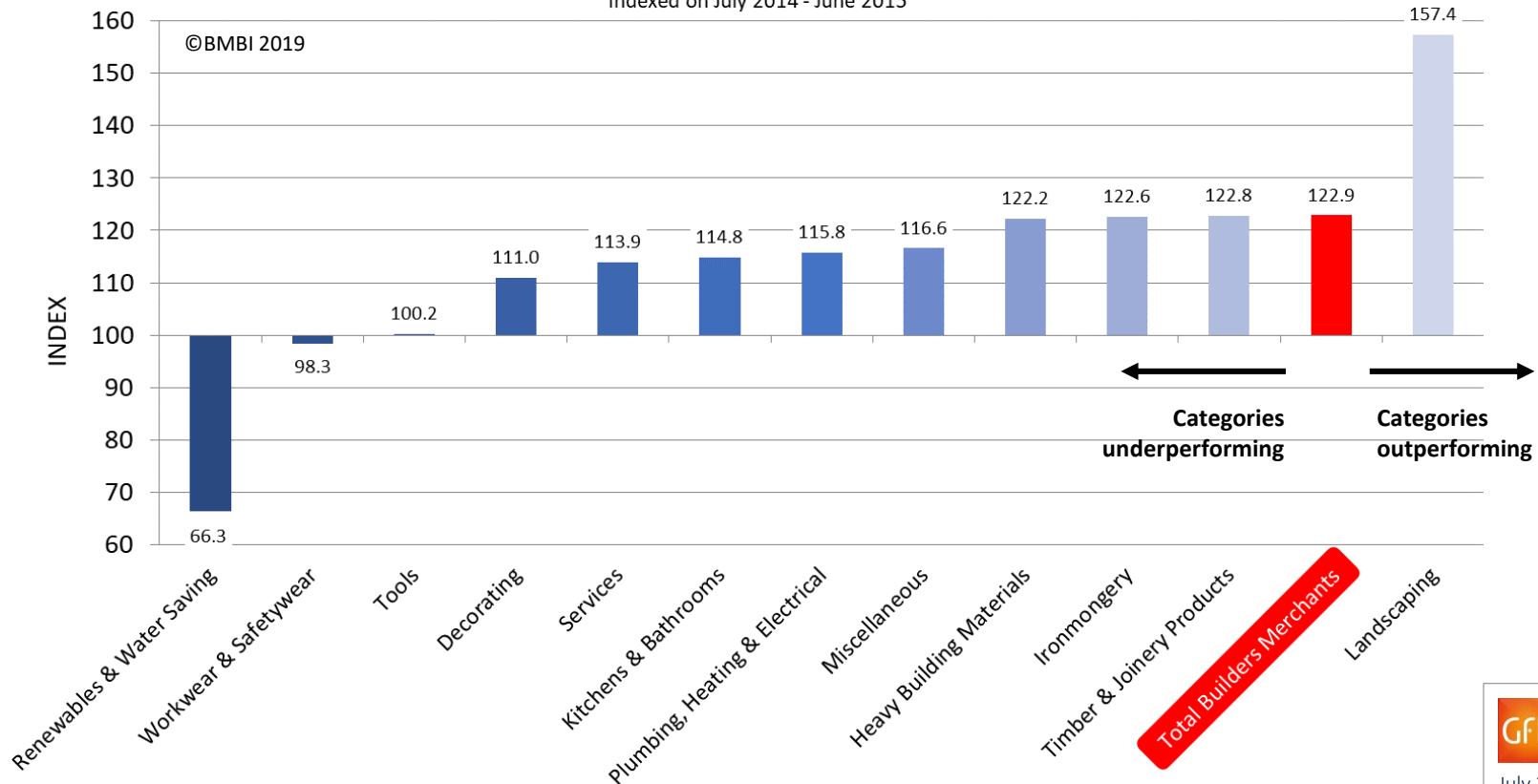
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2019

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

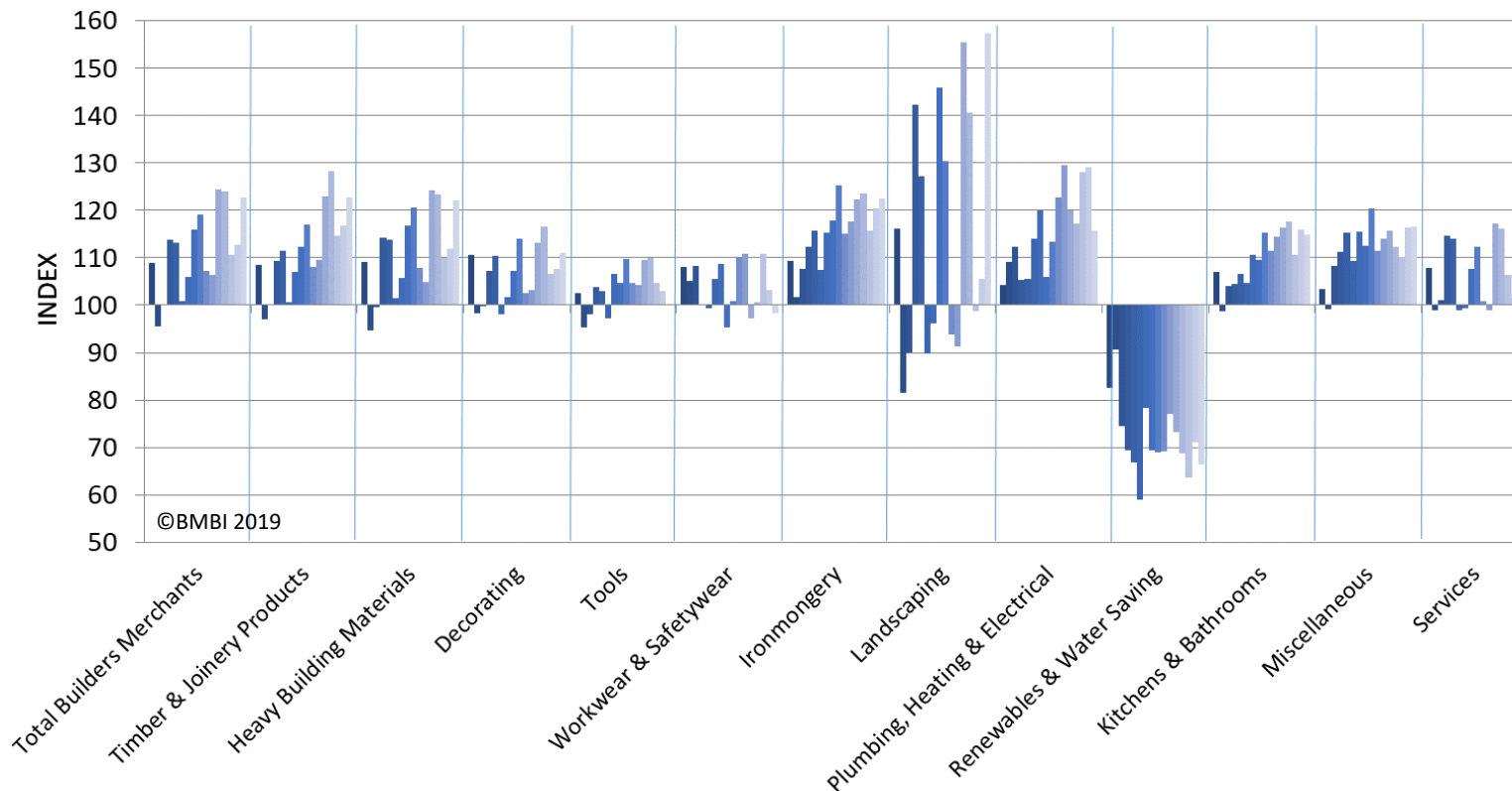
Quarterly indices



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

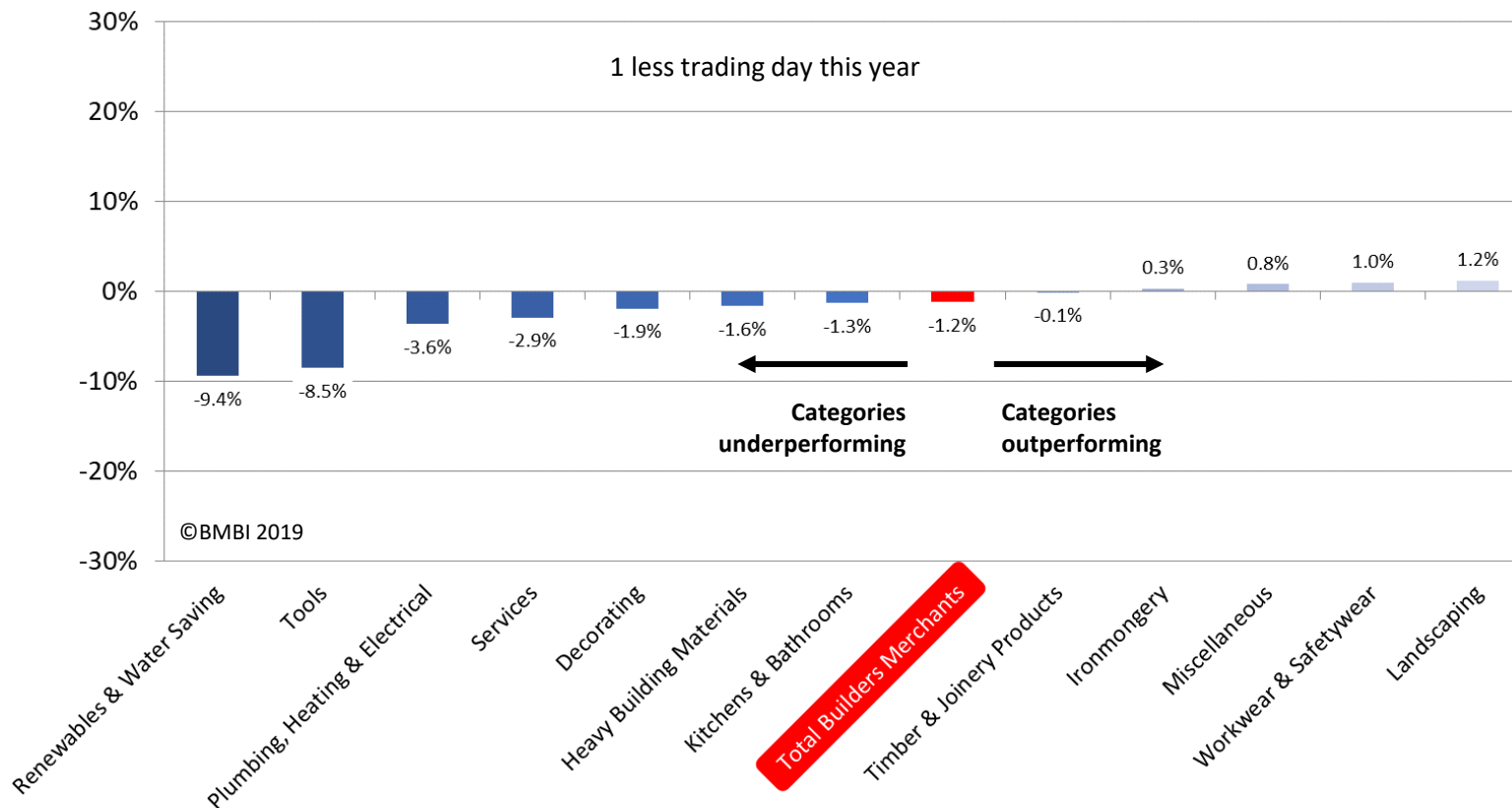


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2019

Quarterly: This Year v Last Year

Q2 2019 sales indices

Quarter 2 2019 index v Quarter 2 2018 index

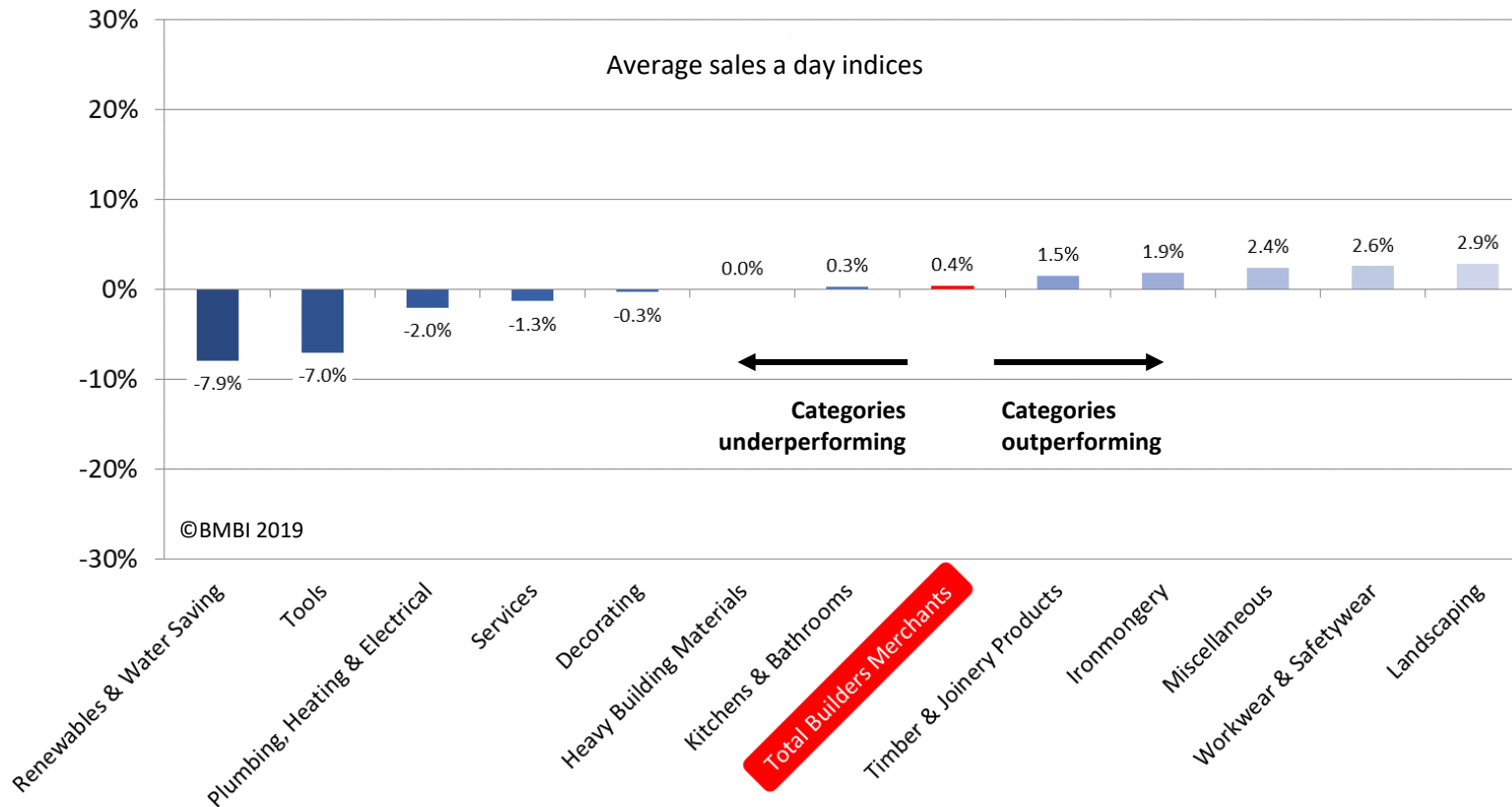


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2019

Quarterly: This Year v Last Year

Q2 2019 average sales a day indices

Quarter 2 2019 index v Quarter 2 2018

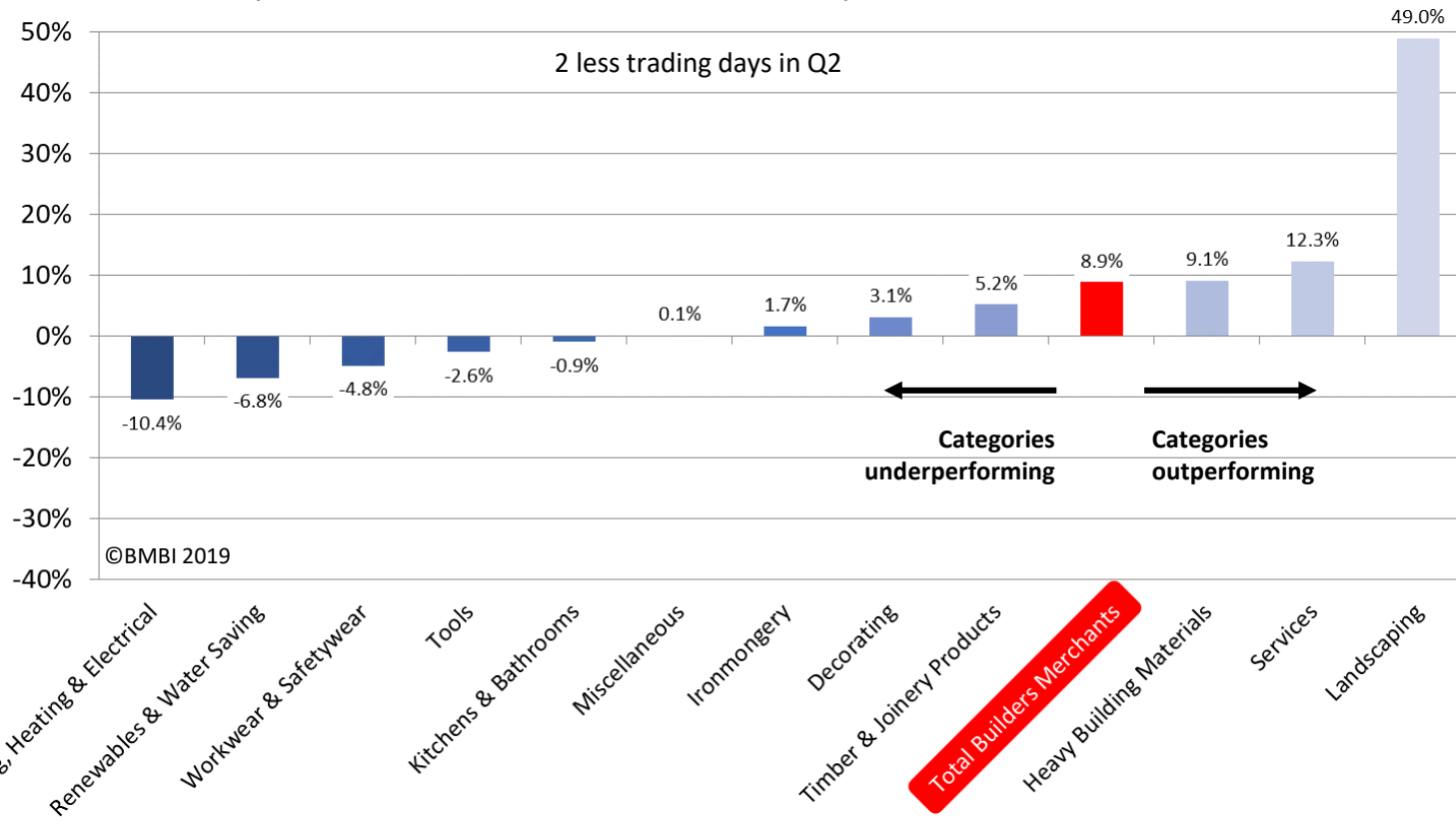


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2019

Quarterly: Quarter on Quarter

Q2 2019 sales indices

Quarter 2 2019 index v Quarter 1 2019

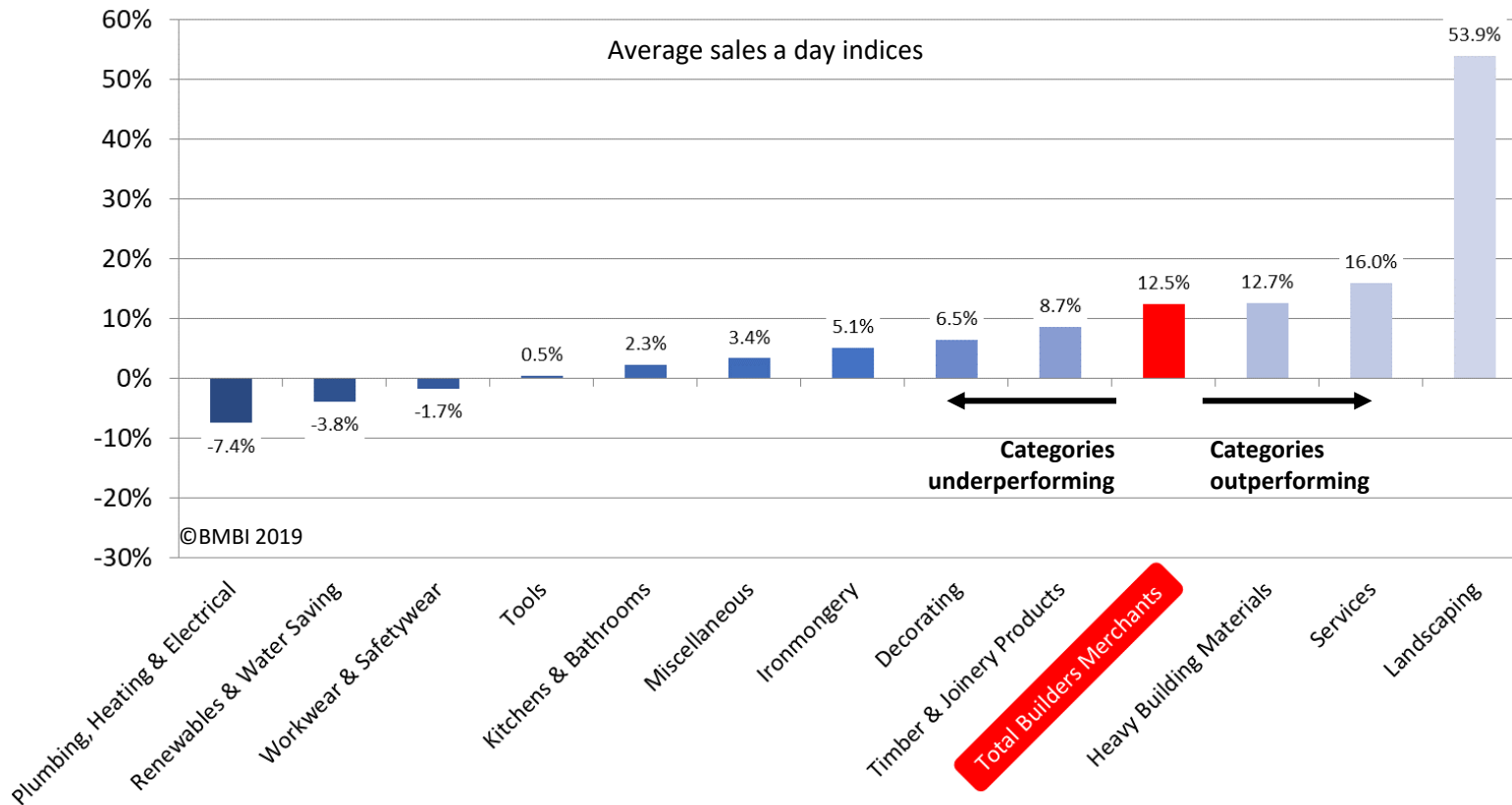


 Source: GfK's Builders Merchants Total Category Report July 2015 to June 2019

Quarterly: Quarter on Quarter

Average sales a day indices

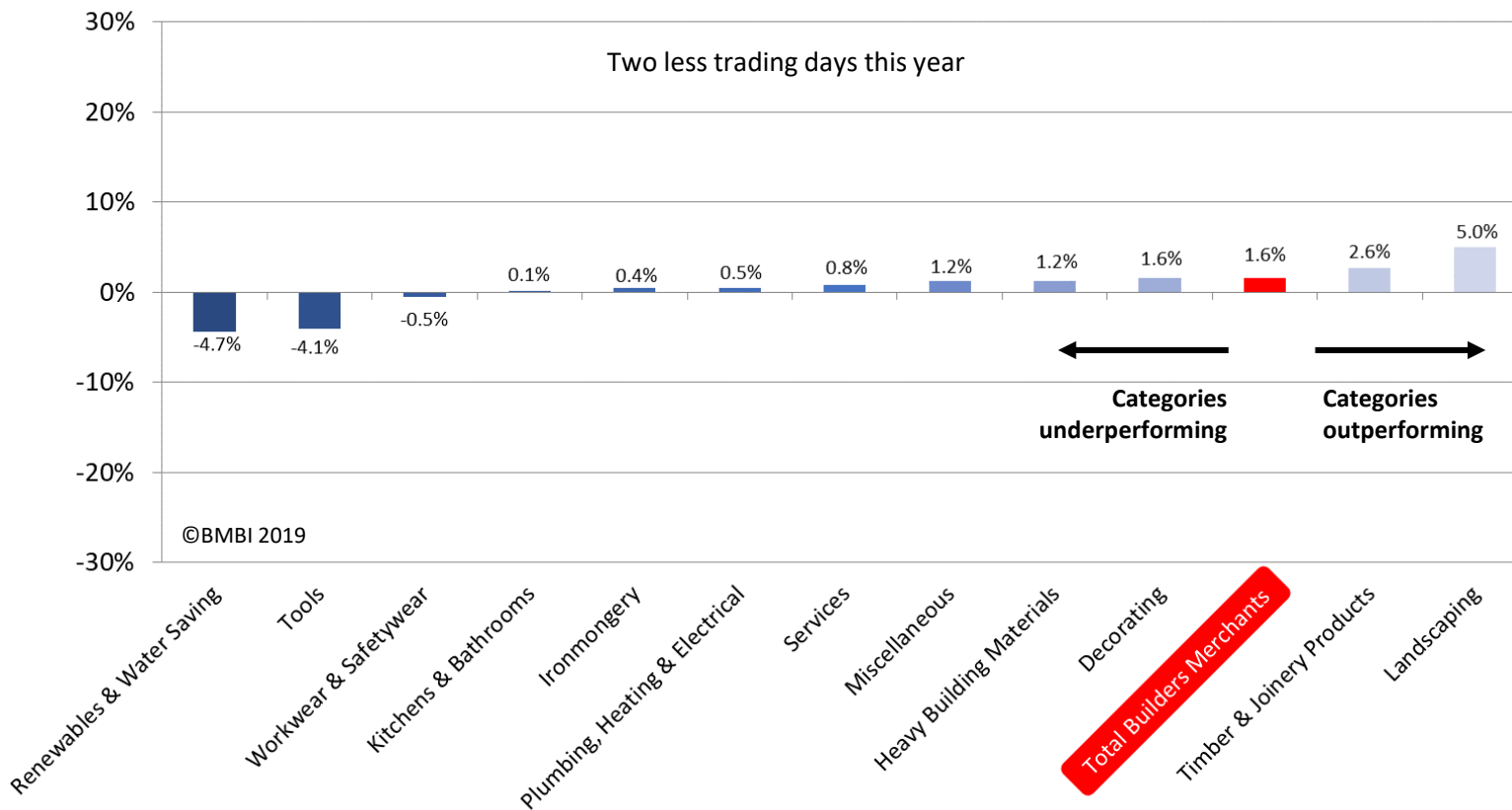
Quarter 2 2019 Index v Quarter 1 2019



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

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

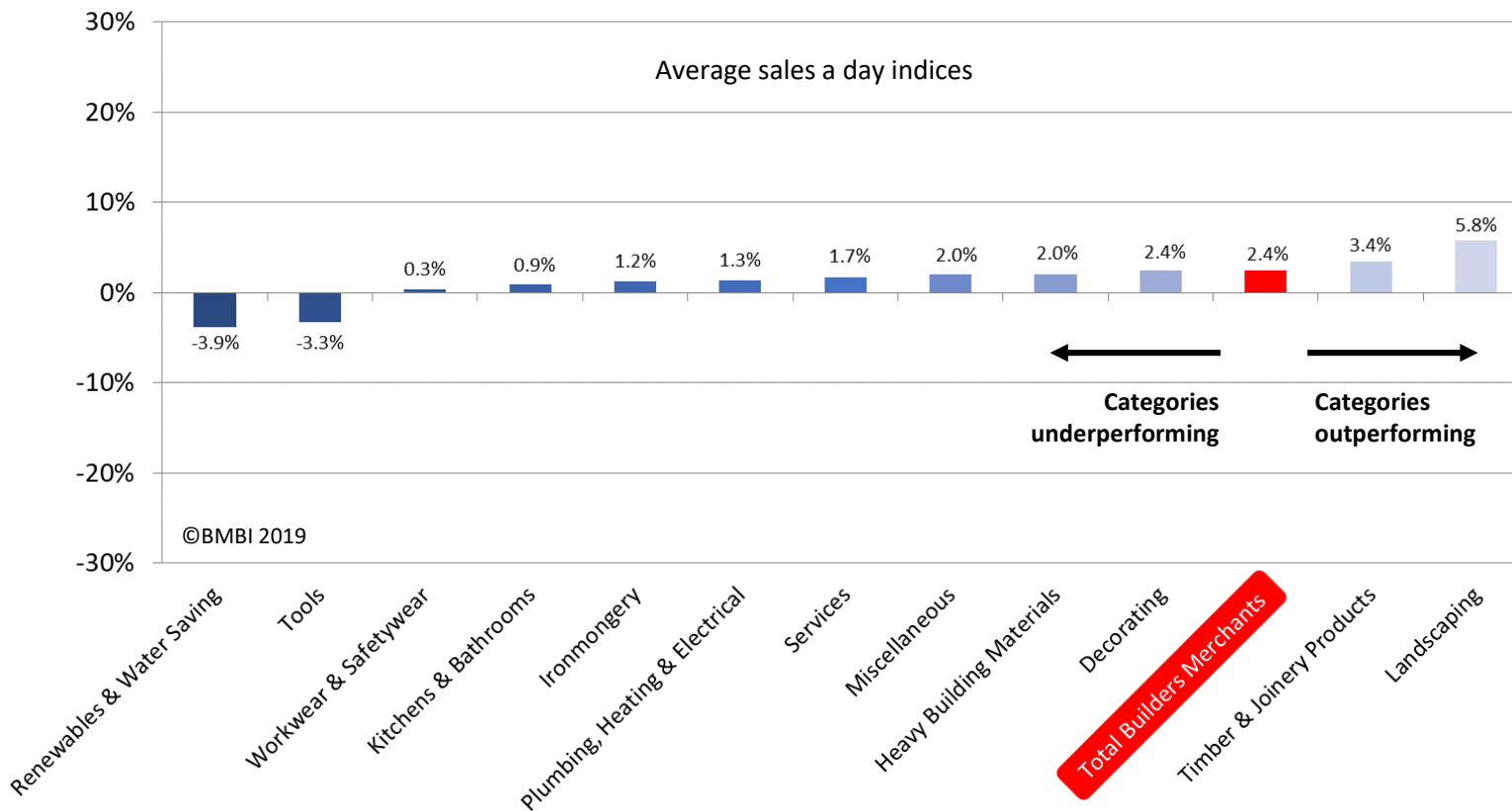
12 months Sep 18 to Aug 19 v 12 months Sep 17 to Aug 18



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

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

12 months Sep 18 to Aug 19 v 12 months Sep 17 to Aug 18



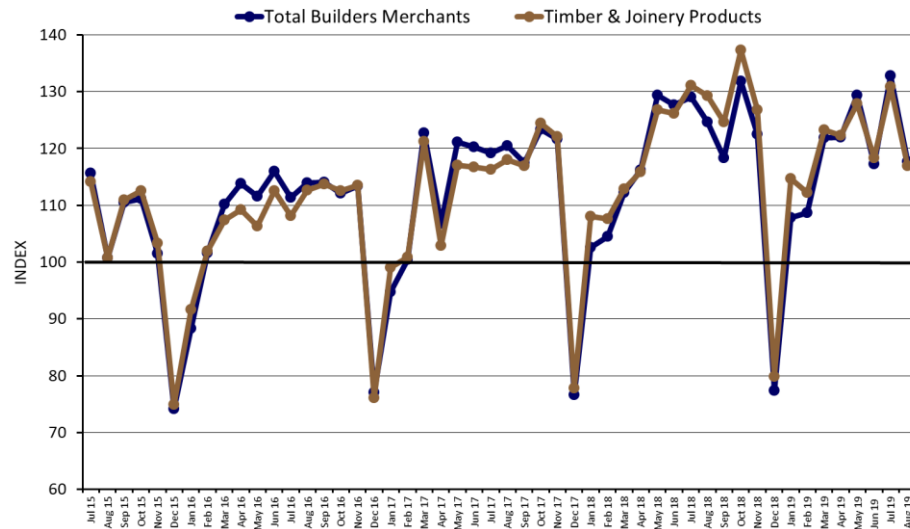
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: Indices

August 2019

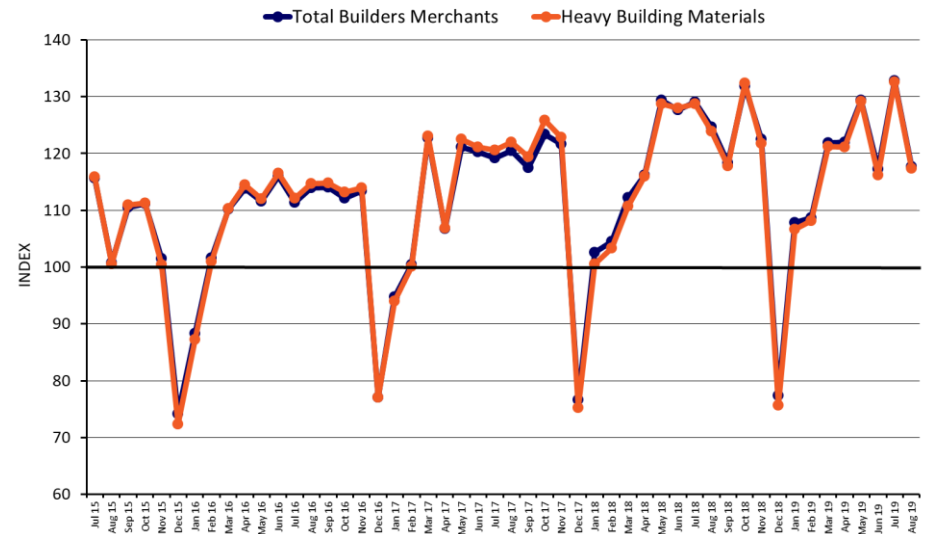


Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



Indexed on July 2014 – June 2015

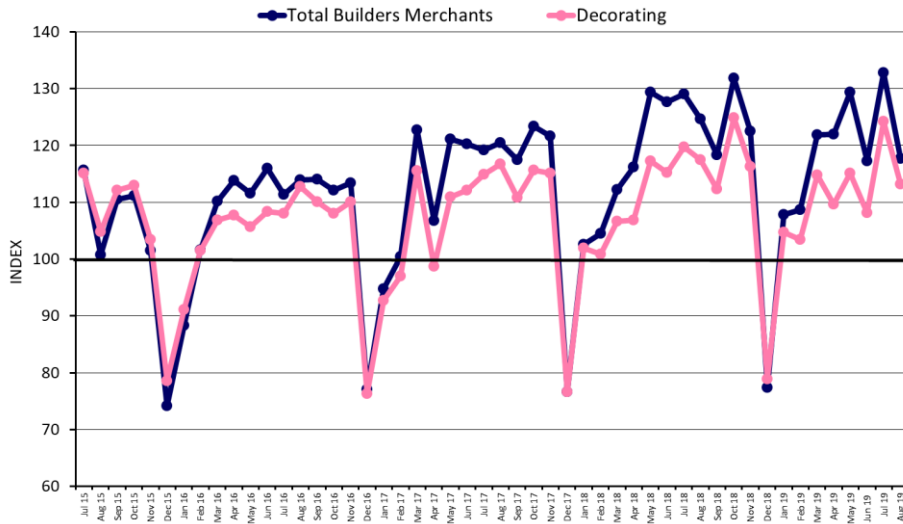
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: Indices

August 2019

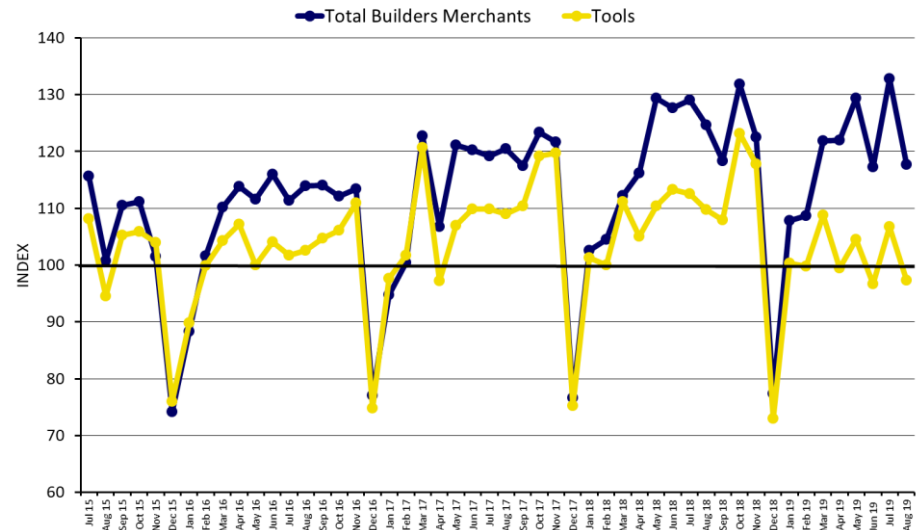


Decorating



Indexed on July 2014 – June 2015

Tools



Indexed on July 2014 – June 2015

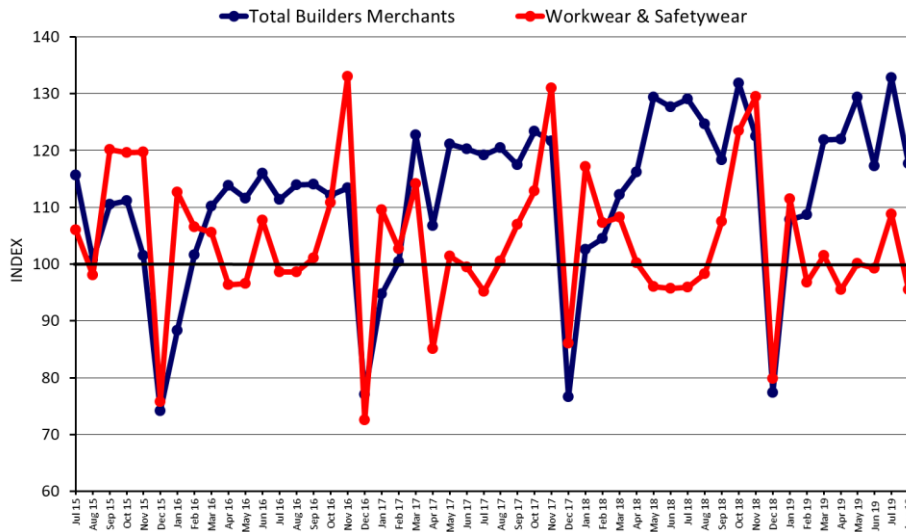
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: Indices

August 2019

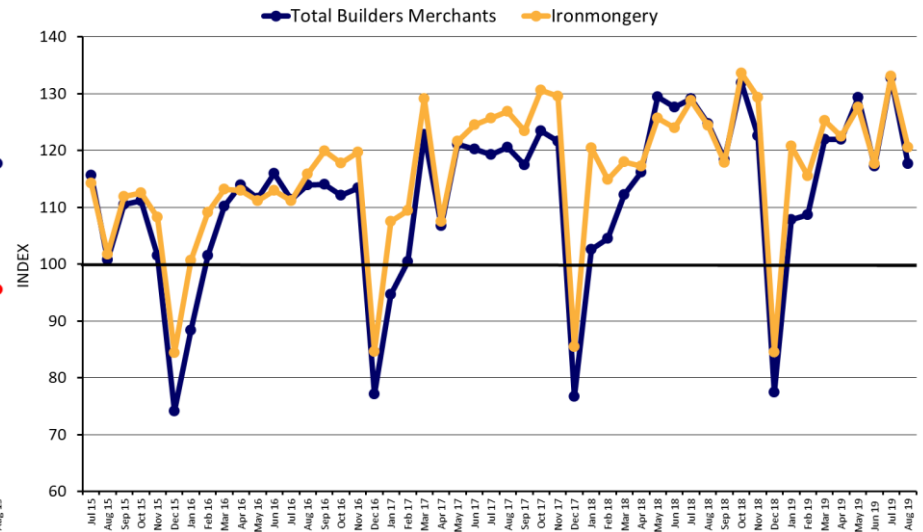


Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery



Indexed on July 2014 – June 2015

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

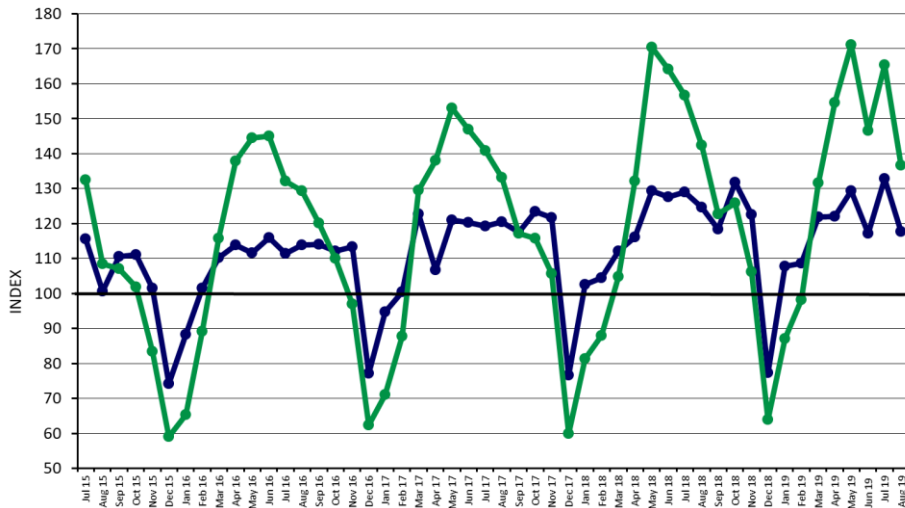
Monthly: Indices

August 2019



Landscaping

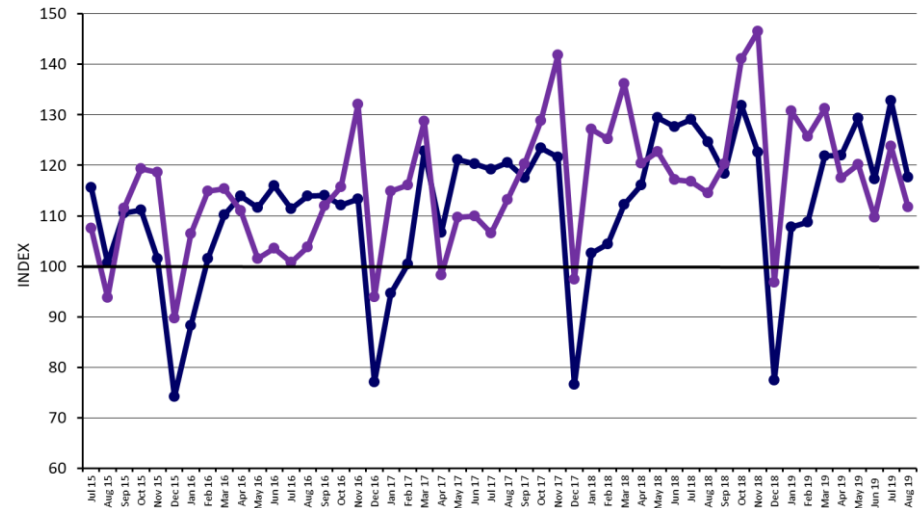
● Total Builders Merchants ● Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical

● Total Builders Merchants ● Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

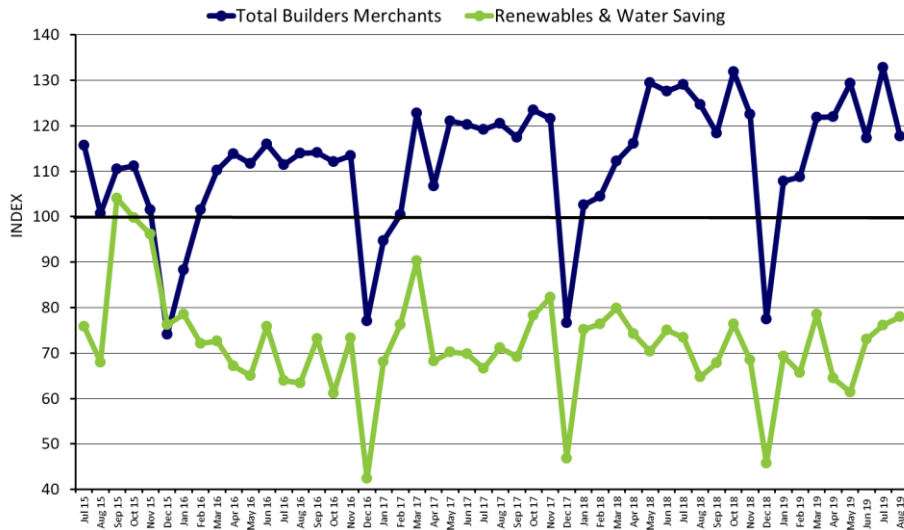
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2019

Monthly: Indices

August 2019

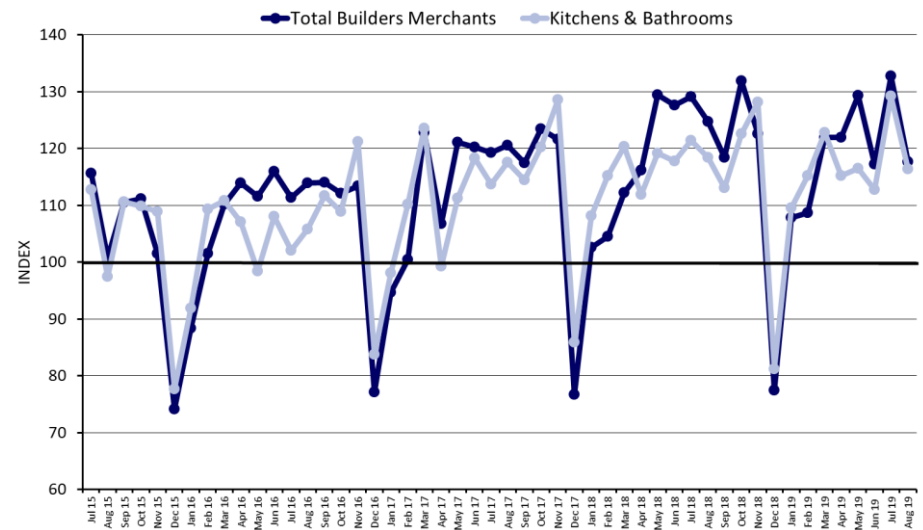


Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



Indexed on July 2014 – June 2015

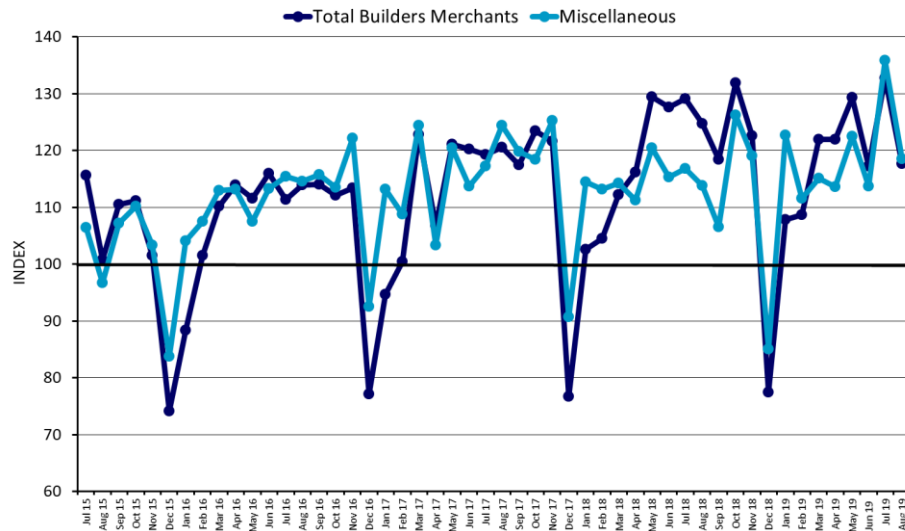
Source: GfK's Builders Merchants Total Category Report July 2015 to August 2019

Monthly: Indices

August 2019

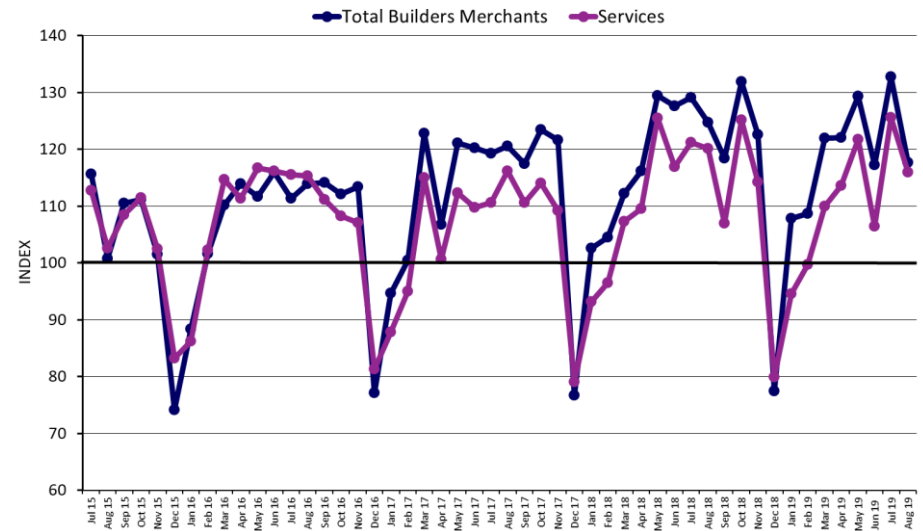


Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

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

Trading Days

Monthly

Index: 20.8

2015											
						Jul	Aug	Sep	Oct	Nov	Dec
						22	20	22	22	21	17
2016											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	21	21	21	20	22	21	22	22	21	22	17
2017											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	23	18	21	22	21	22	21	22	22	16
2018											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	21	21	22	22	20	22	22	16
2019											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug				
22	20	21	20	21	20	23	21				

Quarterly

Index: 62.4

2015			
			Q4
			60
2016			
Q1	Q2	Q3	Q4
62	63	65	60
2017			
Q1	Q2	Q3	Q4
64	61	64	60
2018			
Q1	Q2	Q3	Q4
63	62	64	60
2019			
Q1	Q2		
63	61		

Half Year

Index: 125

2016	
H1	H2
125	125
2017	
H1	H2
125	124
2018	
H1	H2
125	124
2019	
H1	H2
124	

Full Year

Index: 250

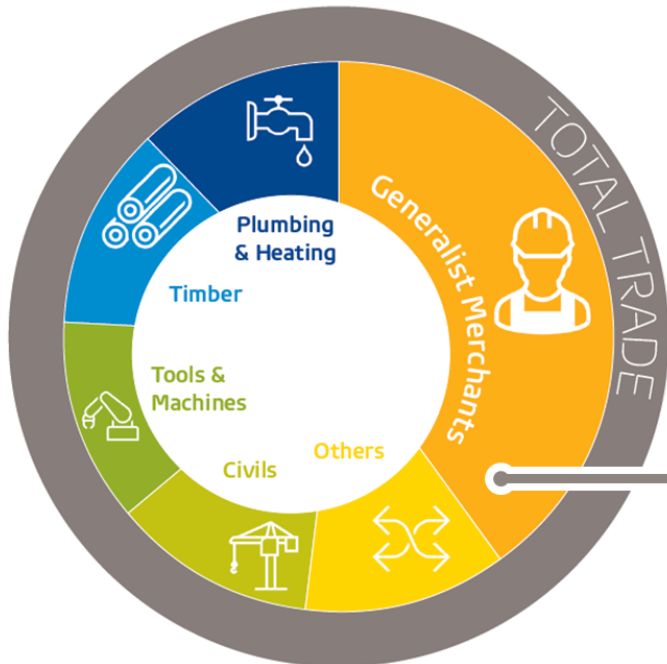
2016
2016
250
2017
2017
249
2018
2018
249
2019
2019
124

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

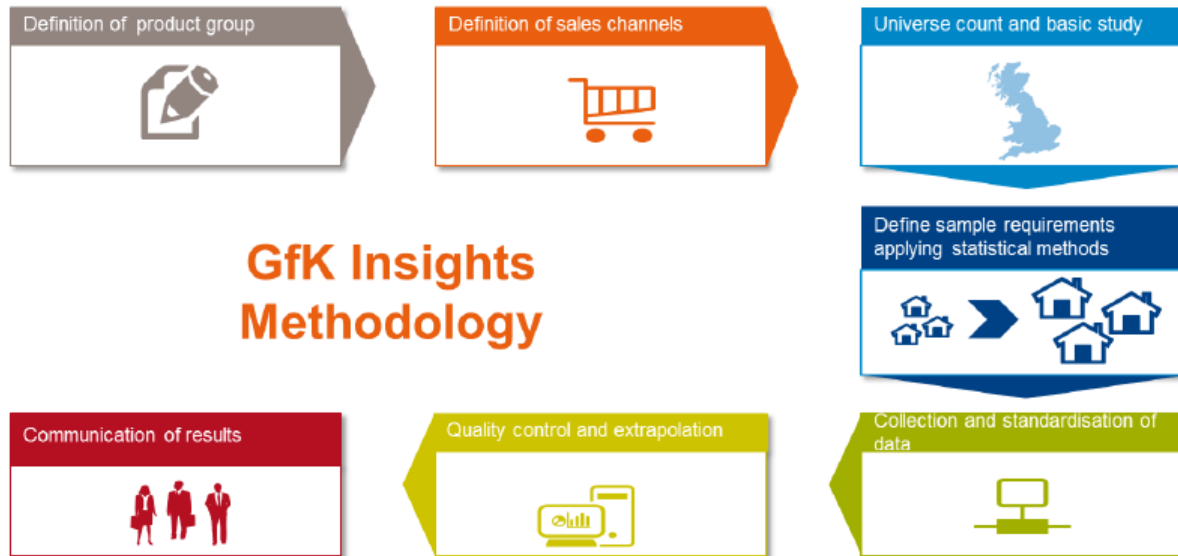
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

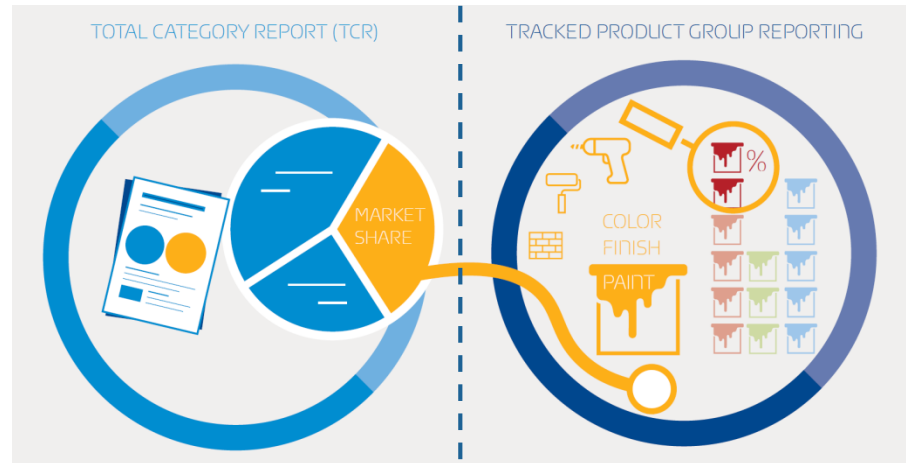
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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 Pete Church at GfK (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



**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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