

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for February 2020

Building the Industry & Building Brands from Knowledge



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

The collage features several key reports and charts:

- Monthly and Quarterly Indices:** A chart comparing December 2019 and Q4 2019 for the Plumbing, Heating & Electrical category, showing a significant dip in December 2019 followed by a recovery in Q4 2019.
- GfK's Product Categories:** A report titled 'Cover category headline values & in-depth, reveal insights' showing available values for various product categories like Landscaping, Plumbing, Heating & Electrical, etc.
- Macro factors impacting Merchants:** A report discussing the impact of Brexit and other macro factors on the building industry.
- Consumer Confidence Index:** A line chart showing the Consumer Confidence Index for the UK from 2010 to 2019, with a notable dip in 2019.
- Expert Panel:** A report titled 'Civils & Green Urbanisation' by Steve Durrant-Hollamby, Managing Director of Polypipe Civils, discussing the impact of climate change and the need for green urbanisation.
- In-depth product group reporting:** A report providing detailed insights into specific product categories, including monthly sales values, volume, pricing analysis, and distribution.

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.

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: British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Alumasc Water Management Solutions, Hanson Cement, IKO PLC, Keystone Lintels, Knauf Insulation, Talasey Group, Heatrae Sadia (Baxi Heating UK), Dulux Trade and Lakes.

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. From time to time, news outlets, including the BBC contacts BMBI Experts and MRA for commentary on the industry.

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

Lacklustre February – before COVID-19

Having endured three and a half years of Brexit turmoil, the country now faces a far bigger challenge and greater uncertainty. February pre-dated social distancing (which started on 19 March) and the lockdown (which took effect on 24 March), hence merchants' February trading will not have been much affected by the emerging Coronavirus pandemic..

Year-on-Year

Total Builders' Merchant sales in February were down 1.3% compared with February 2019. Three categories were weaker: Timber & Joinery Products (-6.9%); Tools (-4.0%) and Heavy Building Materials (-1.9%). Among the seven categories that sold more this year, Workwear & Safetywear showed strong growth (+30.8%) driven by higher demand for protective equipment (including masks, goggles and gloves). Landscaping sold 7.4% more and Kitchens & Bathrooms grew by 3.5%.

Month-on-Month

Compared with January, sales in February were 2.2% higher despite having two less trading days. Eight categories sold more, led by Landscaping (+16.5%) – despite it being the wettest February on record. Kitchens & Bathrooms (+7.8%) and Workwear & Safetywear (+6.8%) also did well. Four categories sold less, including Timber & Joinery Products (-2.2%) and Plumbing Heating & Electrical (-1.5%). Average sales a day (which takes trading day differences into account) were 12.4% higher than in January and all categories increased.

Other periods

Sales in the three months December 2019 to February 2020 were 1.2% lower than in the same period a year earlier. Nine categories did better, including Workwear & Safetywear (+14.1%) and Landscaping (+5.3%). However Timber & Joinery Products (-6.0%) and Tools (-4.8%) were weaker.

The 12 months March 2019 to February 2020 were down 0.9% on the same period a year earlier, with one less trading day. Average sales a day in the last 12 months were down 0.5%.

Index

February's BMBI index was 107.6. Ten of the twelve categories exceeded 100, led by Workwear & Safetywear (128.0) and seasonal category Plumbing, Heating & Electrical (126.9).

Workwear & Safetywear showed strong growth (+30.8%) driven by higher demand for protective equipment (including masks, goggles and gloves).

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

Meet the Builders Merchant Building Index Experts:

Expert for Drylining Systems:



Stacey Temprell,
Marketing Director
British Gypsum

[Read latest comment: Q4 2019 Report](#)

Expert for Bricks & Roof Tiles:



Kevin Tolson,
Commercial Director
Wienerberger UK

[Read latest Comment: Q4 2019 Report](#)

Expert for PVC-U Windows & Doors:



No.1 for choice • No.1 for colour

Kevin Morgan
Group Commercial Director
The Crystal Group

[Read latest Comment: Q4 2019 Report](#)

Expert for Civils & Green Urbanisation:



Steve Durdant-Hollamby,
Managing Director
Polypipe Civils

[Read latest Comment: Q4 2019 Report](#)

Expert for Lead:



Lynn Street
Sales & Marketing Manager
Midland Lead

[Read latest Comment: Q4 2019 Report](#)

Expert for Roof Windows:



Roof Windows

John Duffin
Managing Director
Keylite Roof Windows

[Read latest Comment: Q4 2019 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q4 2019 Report](#)

Expert for Civils, Metal Rainwater & Drainage:



John Coe
Commercial Director
Alumasc Water Management Systems

[Read latest Comment: Q4 2019 Report](#)

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



Malcolm Gough
Group Sales & Marketing Director
Talasey Group

[Read latest Comment: Q4 2019 Report](#)

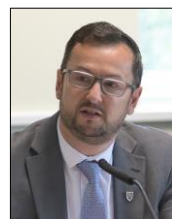
Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q4 2019 Report](#)

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Hanson Cement

[Read latest Comment: Q4 2019 Report](#)

Expert for Paint:



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

[Read latest Comment: Q4 2019 Report](#)

Expert for Water Heating:



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

[Read latest Comment: Q4 2019 Report](#)

Expert for Roofing Products:



Paul Owen
Commercial Director Distribution
IKO PLC

[Read latest Comment: Q4 2019 Report](#)

Expert for Shower Enclosures and Showering:



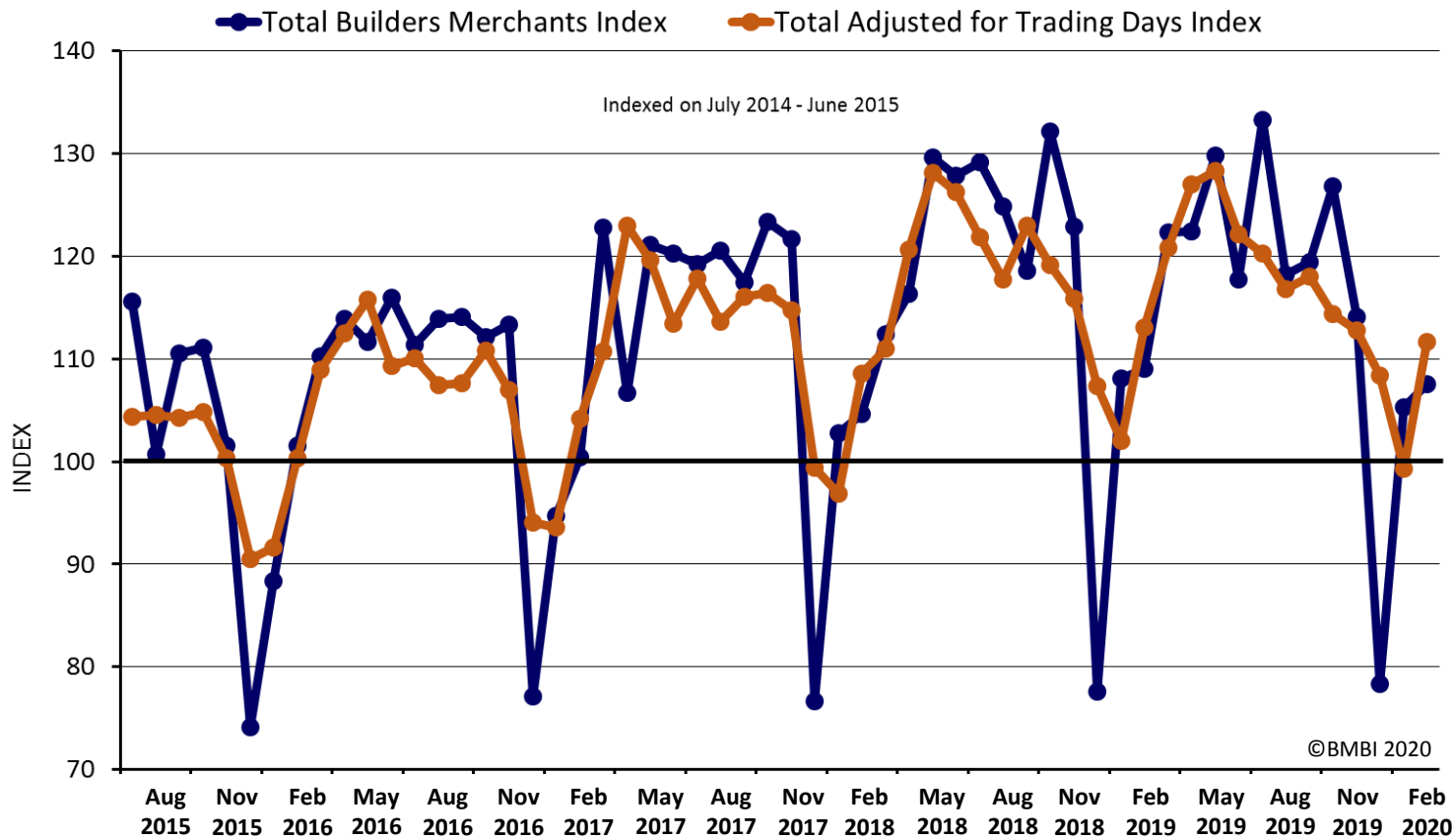
Mike Tattam
Sales & Marketing Director
Lakes

[Read latest Comment: Q4 2019 Report](#)

Monthly: 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 February 2020

Monthly: Index and Categories

February 2019* – February 2020

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



		2019											2020	
MONTHLY SALES VALUE INDEX	Index	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Total Builders Merchants	100	109.0	122.3	122.4	129.8	117.7	133.3	118.2	119.4	126.8	114.1	78.4	105.3	107.6
Timber & Joinery Products	100	112.6	124.1	123.3	128.9	119.3	131.9	118.1	120.5	128.8	115.9	77.4	107.2	104.9
Heavy Building Materials	100	108.2	121.4	121.3	129.4	116.5	132.8	117.5	119.3	126.3	112.5	76.3	103.8	106.2
Decorating	100	103.8	115.1	110.1	115.5	108.5	124.7	113.6	112.9	122.7	113.7	81.6	104.9	105.8
Tools	100	100.2	109.3	100.0	104.9	97.2	107.3	97.7	100.4	113.7	103.9	70.3	94.8	96.2
Workwear & Safetywear	100	97.9	102.0	95.8	100.5	99.5	109.1	97.3	111.7	135.4	135.1	83.2	119.9	128.0
Ironmongery	100	116.3	126.2	123.2	128.4	118.6	134.0	121.6	121.7	132.9	119.9	88.4	118.4	115.9
Landscaping	100	98.2	131.7	154.6	171.1	146.7	165.5	136.8	125.5	120.2	99.0	66.7	90.5	105.5
Plumbing, Heating & Electrical	100	127.0	132.6	118.7	121.3	110.8	124.9	112.9	126.0	143.0	135.9	98.5	128.9	126.9
Renewables & Water Saving	100	67.1	81.0	66.1	63.6	74.8	78.3	79.6	77.5	76.7	74.2	54.1	79.7	88.0
Kitchens & Bathrooms	100	116.0	123.5	115.9	117.3	113.6	130.2	117.4	119.5	128.7	126.7	88.3	111.4	120.1
Miscellaneous	100	112.2	115.7	114.2	123.1	114.6	136.8	119.6	128.7	132.4	121.9	90.8	120.3	115.1
Services	100	99.8	110.0	113.6	121.8	106.5	125.6	116.0	113.2	122.7	113.1	87.2	100.1	103.2

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

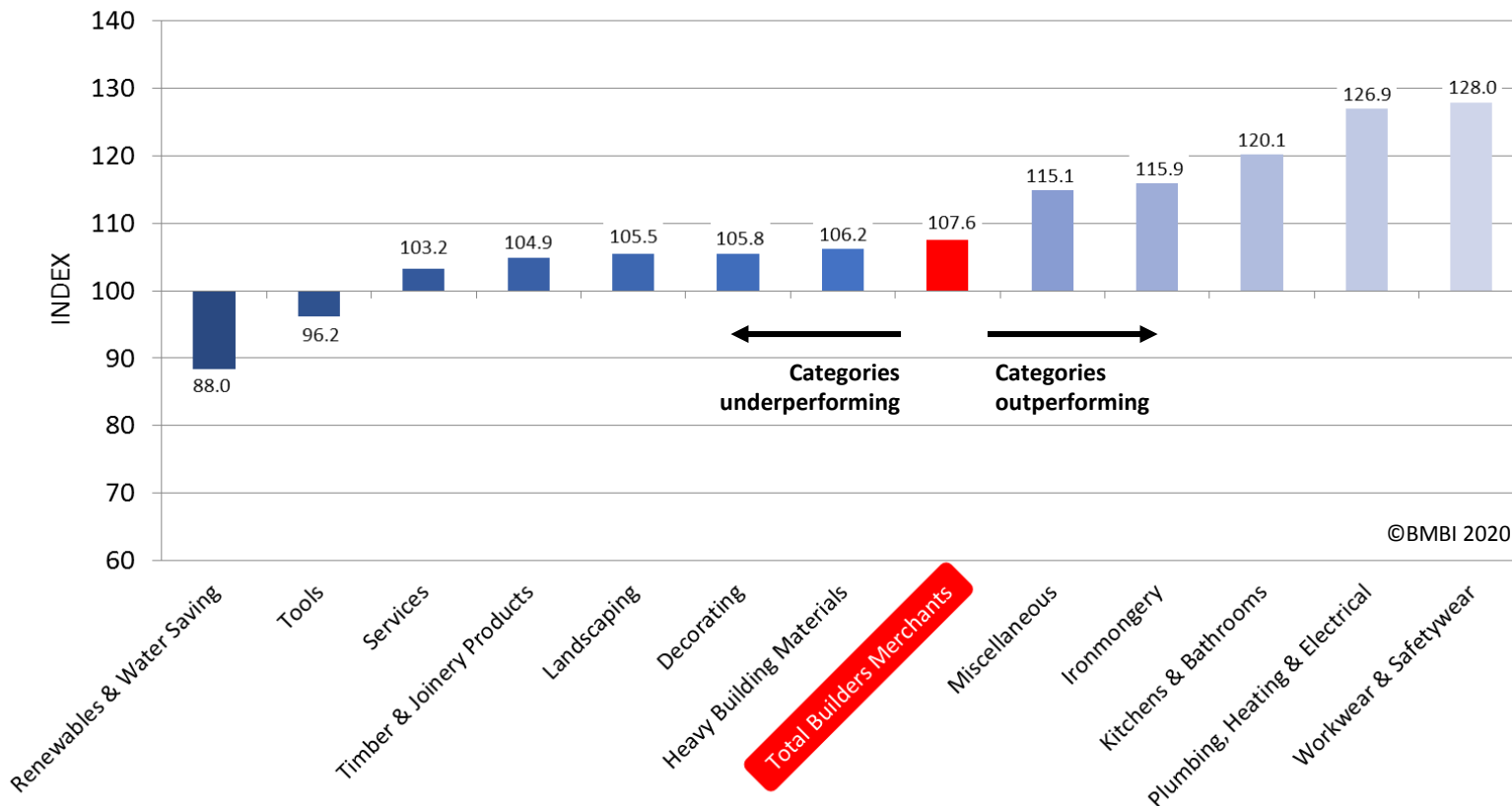
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: Index and Categories

February 2020 index



February 2020 Index



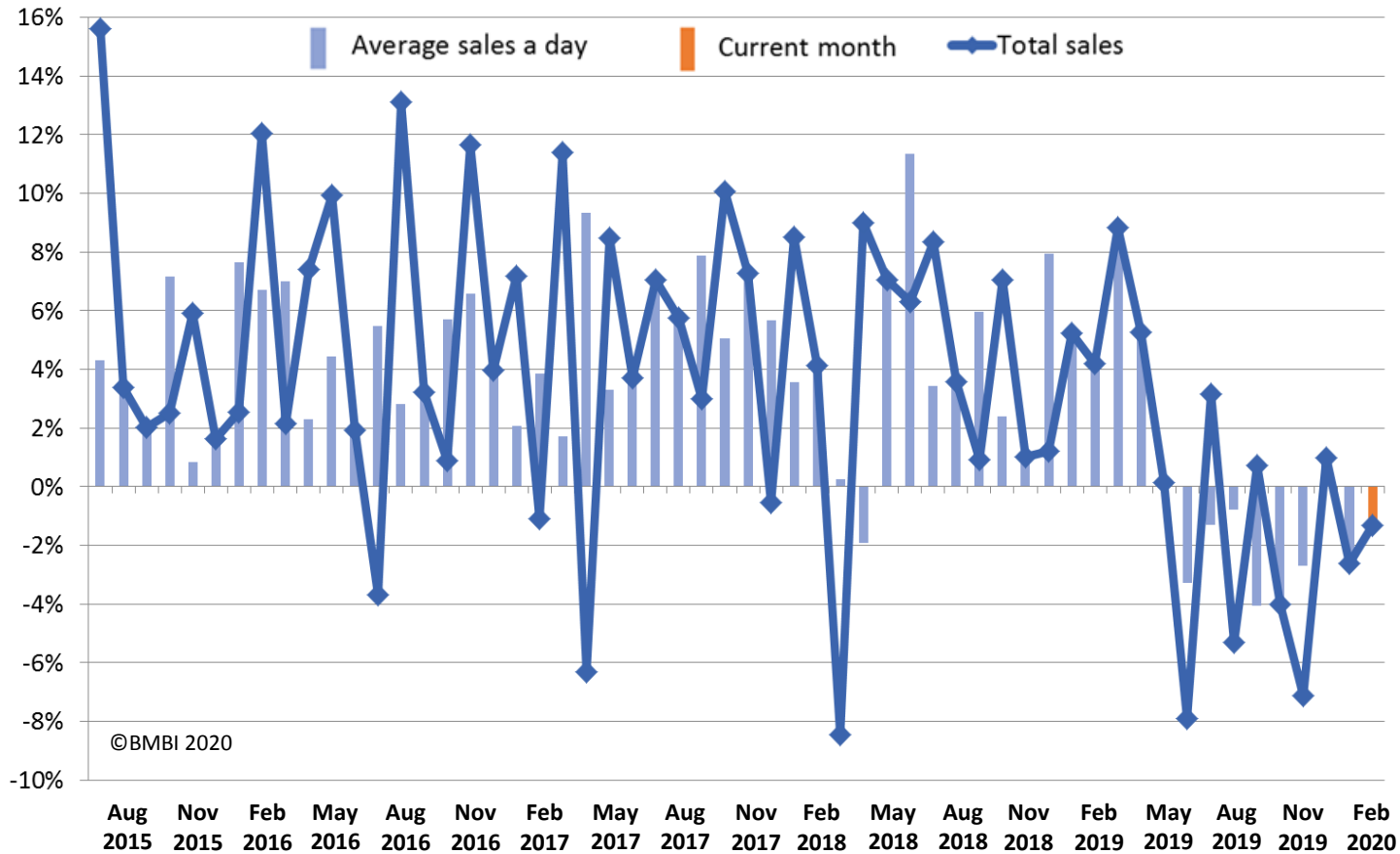
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 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days

Monthly: Year on Year

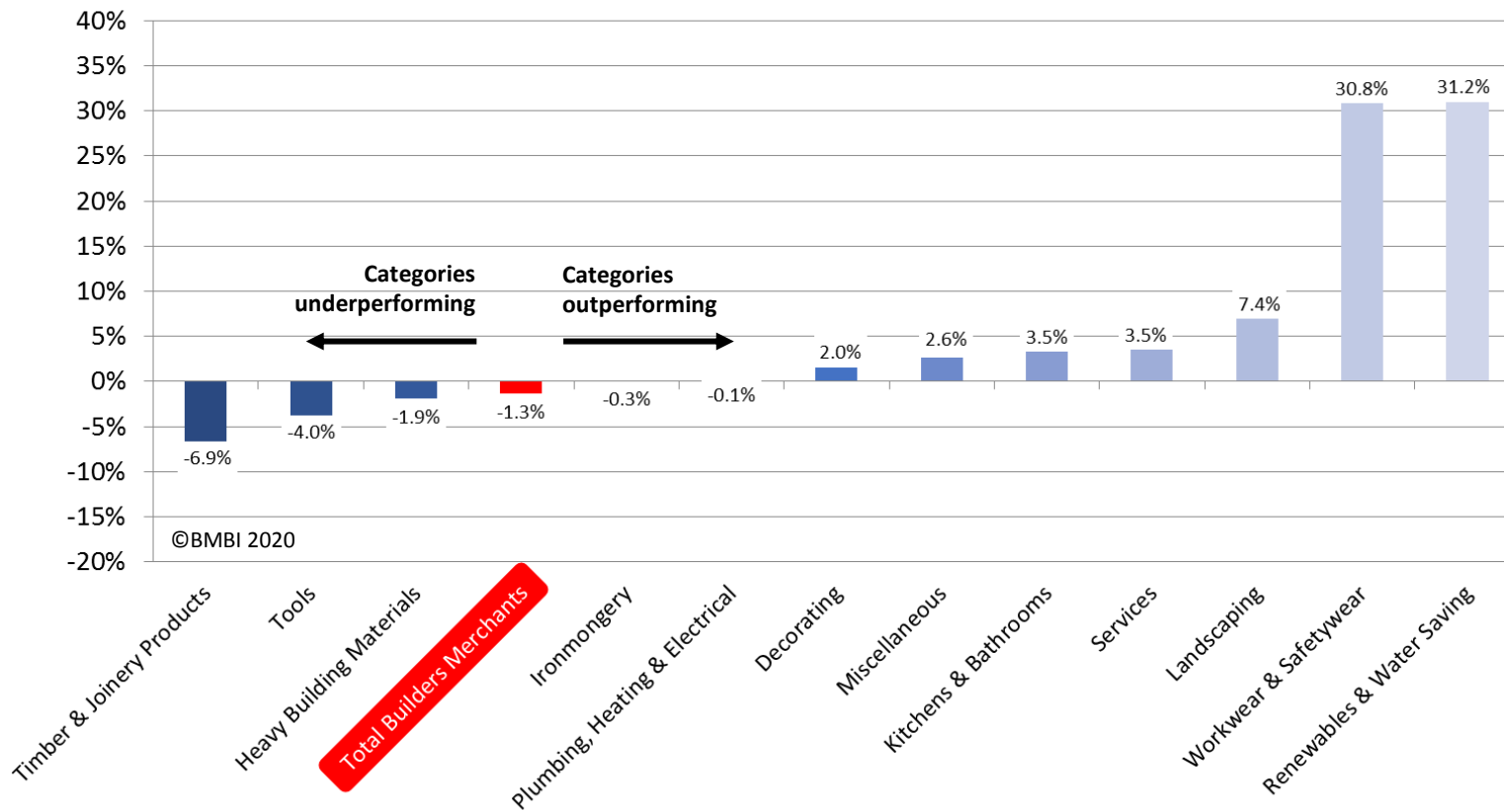


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: This Year v Last Year

February 2020 sales indices

February 2020 index v February 2019 index

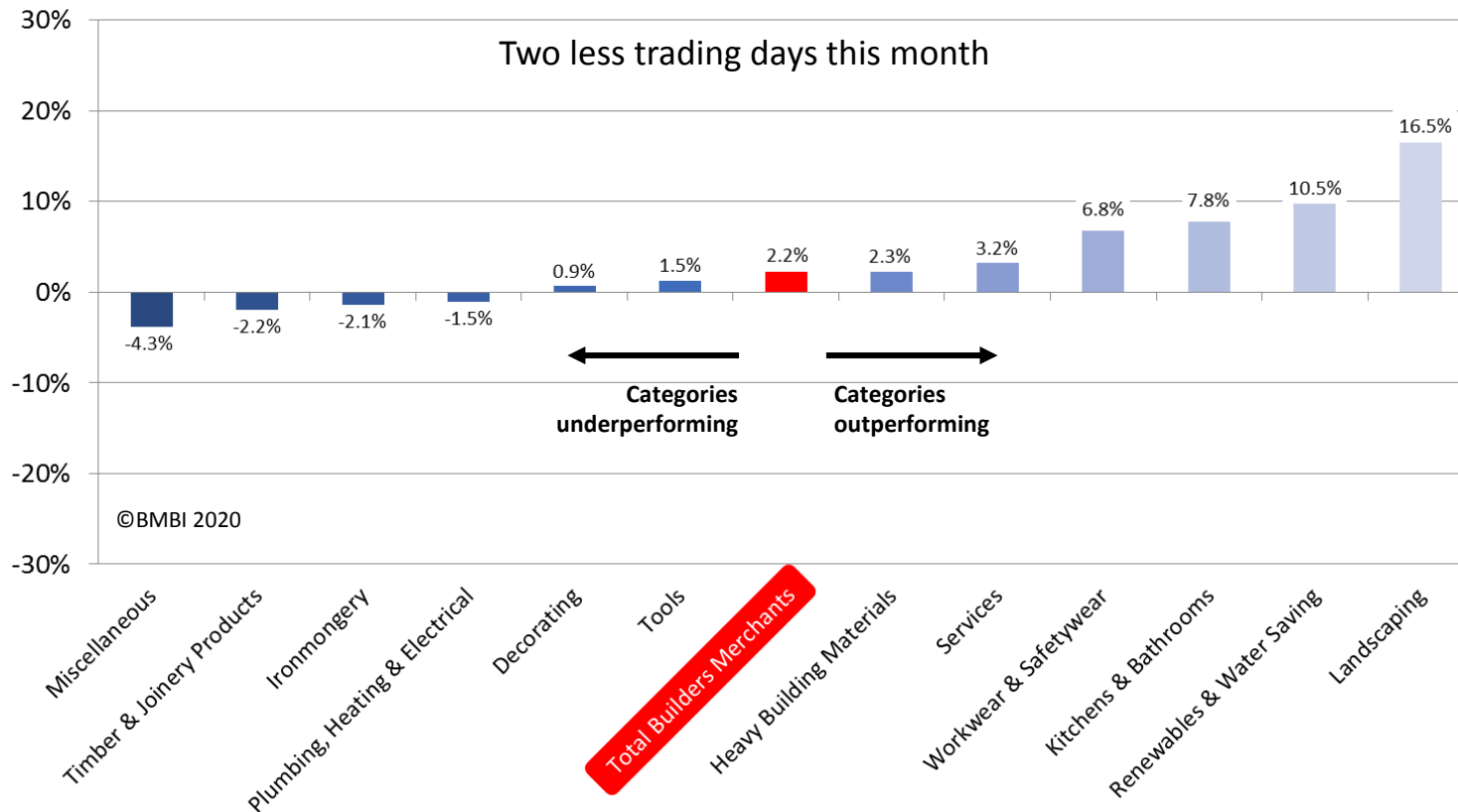


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: This Month v Last Month

February 2020 sales indices

February 2020 index v January 2020 index

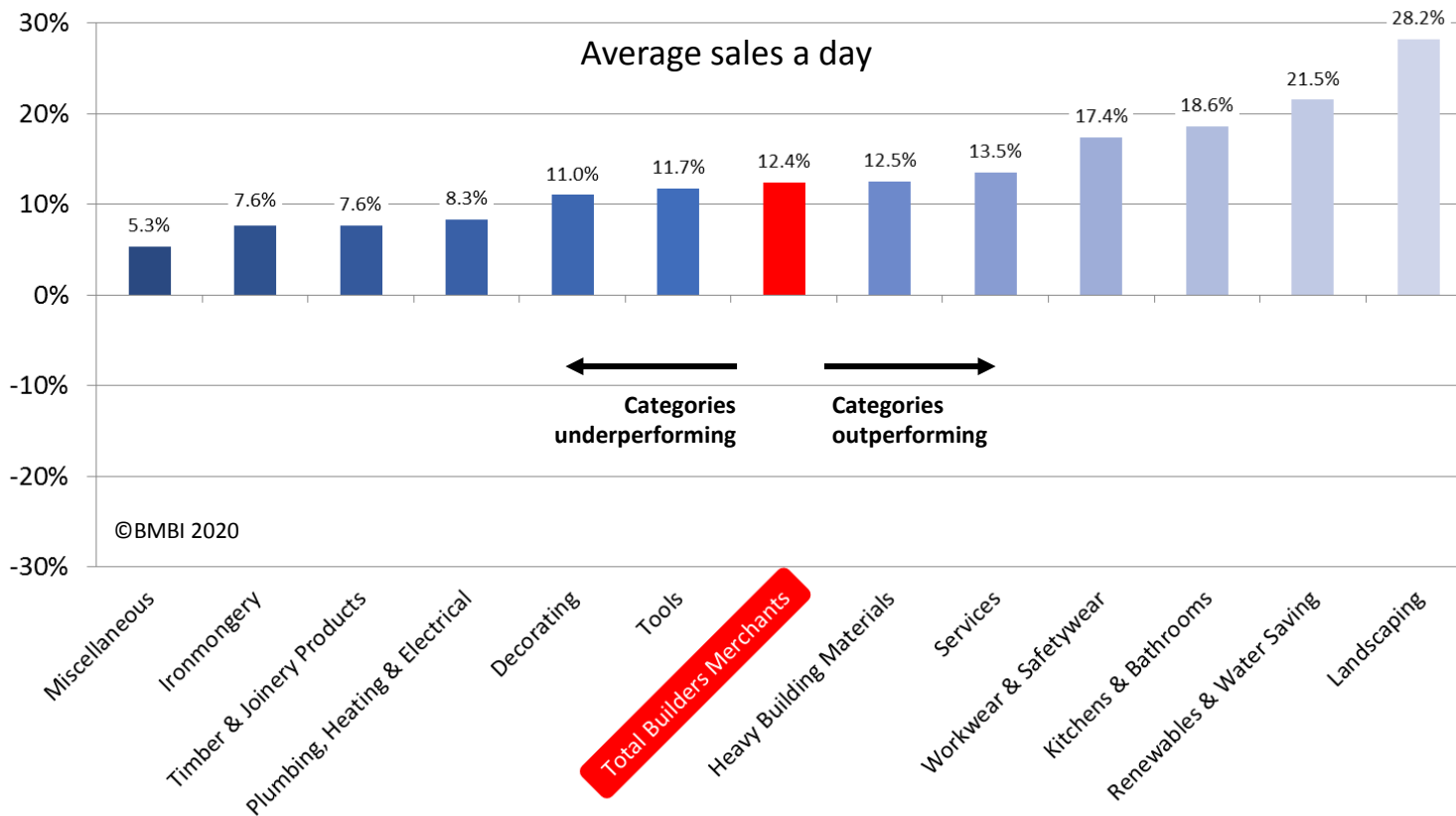


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: This Month v Last Month

February 2020 average sales a day indices

February 2020 index v January 2020 index



 Source: GfK's Builders Merchants Total Category Report July 2015 to February 2020

Quarterly: Index and Categories

Quarter 4 2018* to Quarter 4 2019

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
Total Builders Merchants	100	110.9	113.1	123.3	123.6	106.4
Timber & Joinery Products	100	115.1	117.4	123.8	123.5	107.4
Heavy Building Materials	100	110.1	112.1	122.4	123.2	105.0
Decorating	100	106.9	108.0	111.4	117.1	106.0
Tools	100	104.9	103.5	100.7	101.8	96.0
Workwear & Safetywear	100	111.5	103.9	98.6	106.0	117.9
Ironmongery	100	116.4	121.3	123.4	125.8	113.8
Landscaping	100	98.8	105.7	157.5	142.6	95.3
Plumbing, Heating & Electrical	100	128.8	130.6	117.0	121.3	125.8
Renewables & Water Saving	100	64.2	72.8	68.2	78.5	68.3
Kitchens & Bathrooms	100	111.3	116.7	115.6	122.3	114.6
Miscellaneous	100	110.7	117.2	117.3	128.4	115.0
Services	100	106.4	101.4	113.9	118.3	107.7

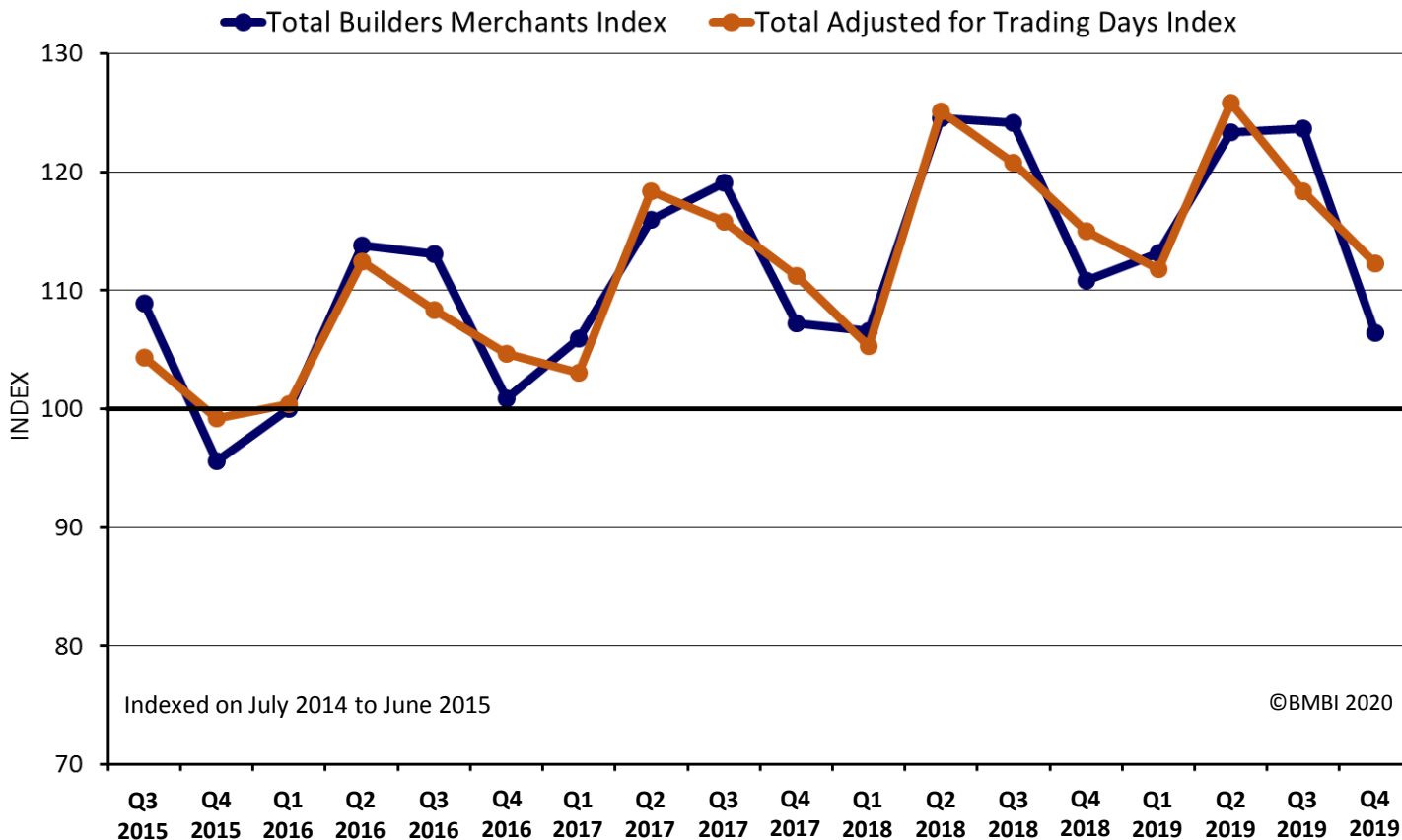
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

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

Quarterly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



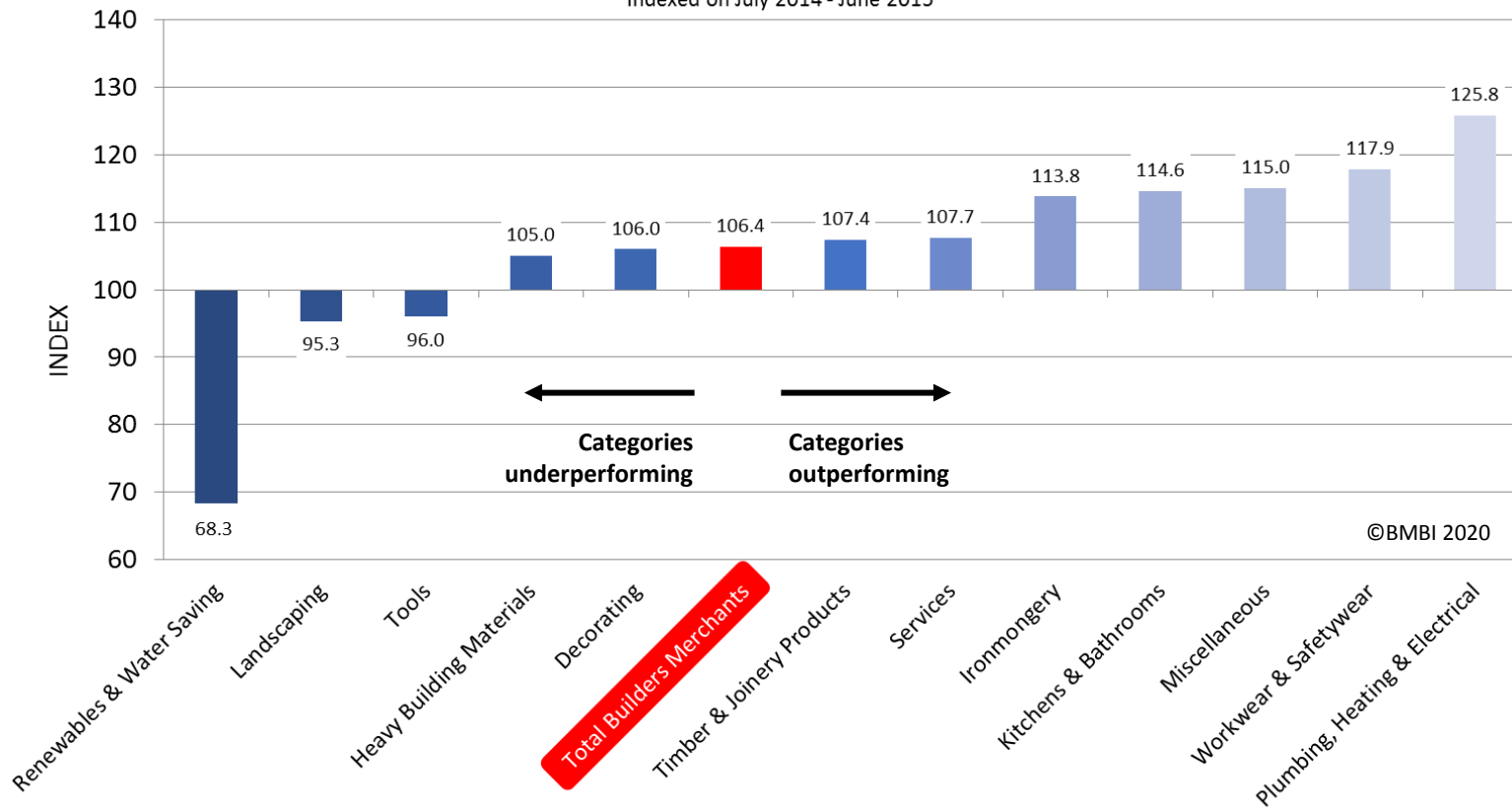
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2019

Quarterly: Index and Categories

Q4 2019 index

Quarter 4 2019

Indexed on July 2014 - June 2015



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

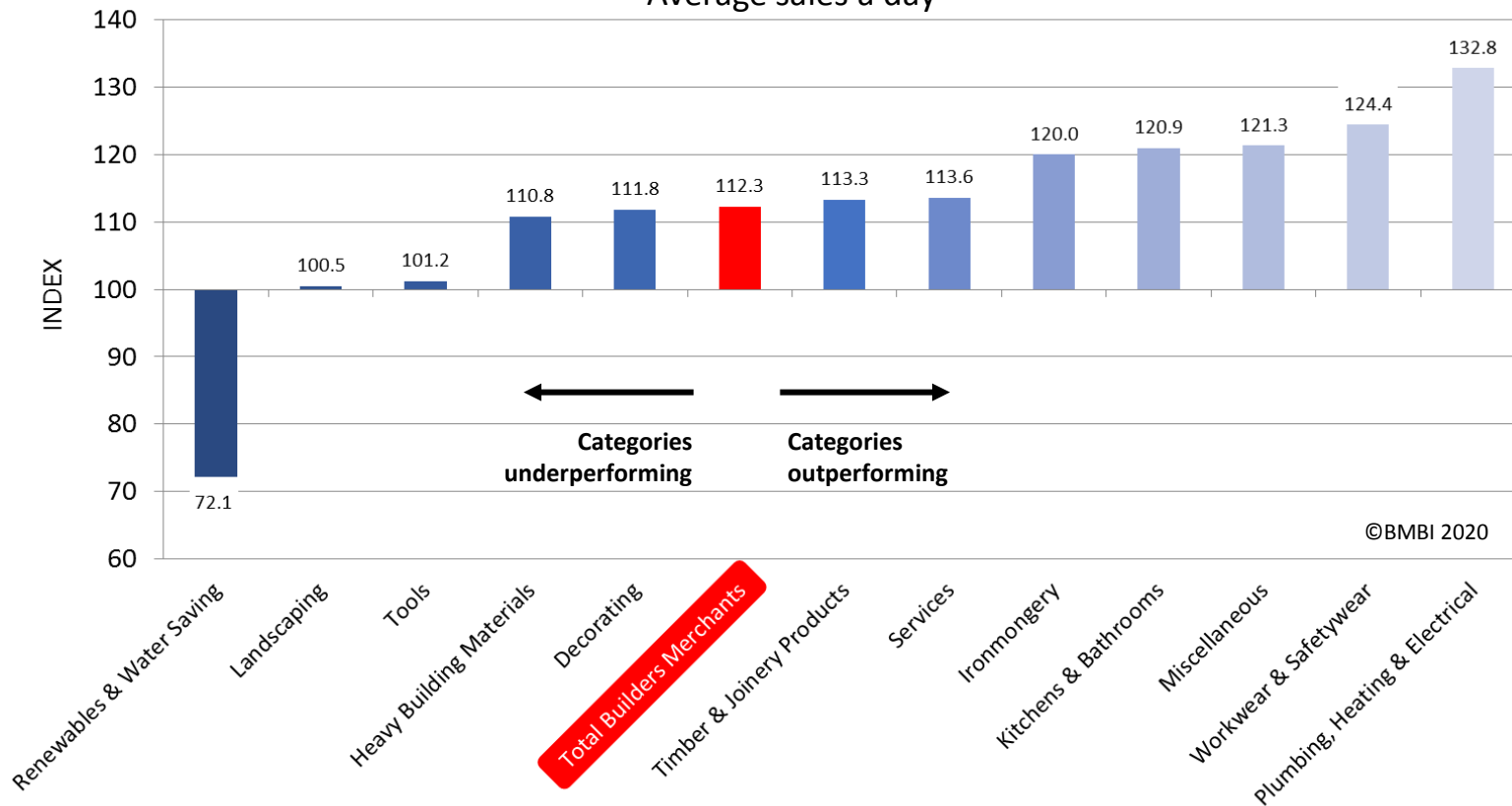
Quarterly: Index and Categories

Q4 2019 average sales a day index



Quarter 4 2019

Average sales a day



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

Indexed on July 2014 - June 2015

Quarterly: Index and Categories

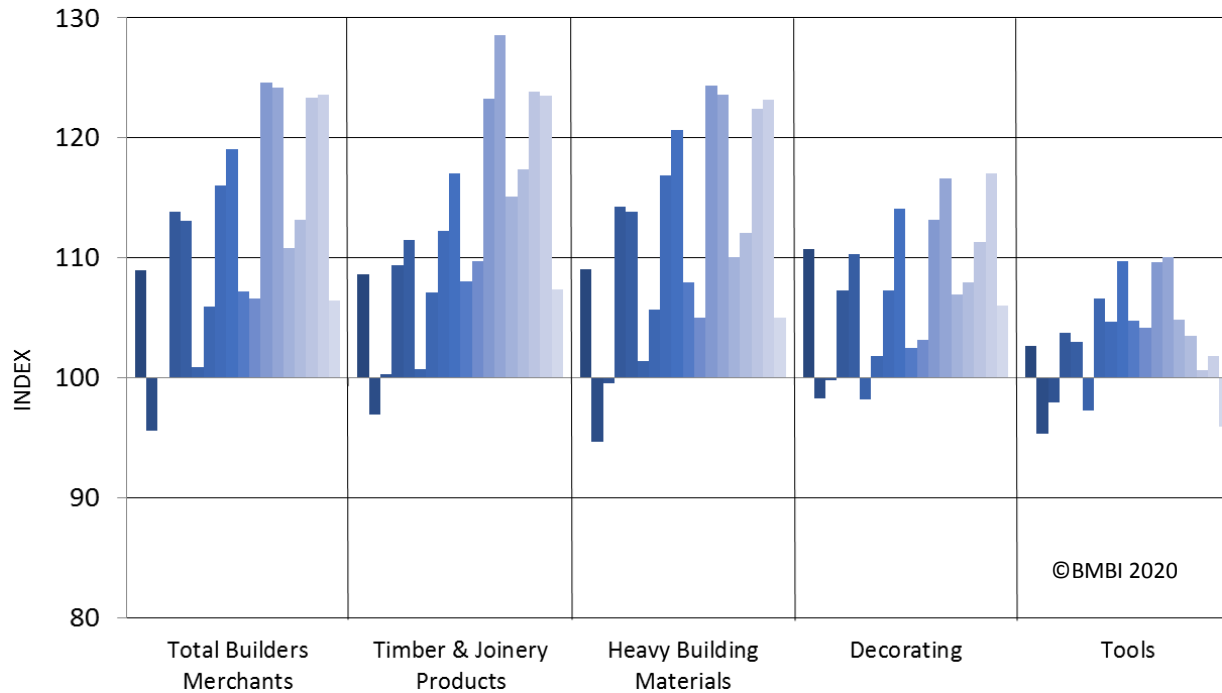
Quarterly indices



Quarterly Indices

Q3 2015 to Q4 2019

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019



©BMBI 2020

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

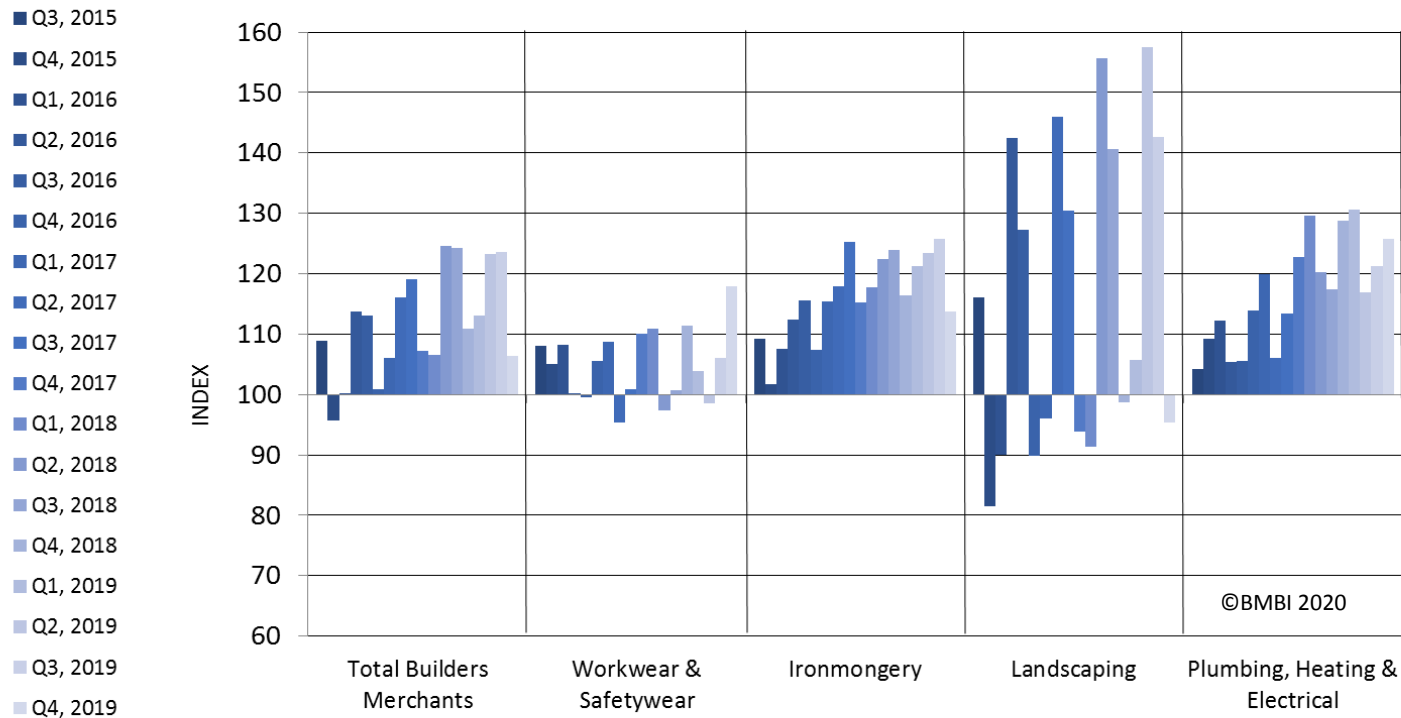
Indexed on July 2014 to June 2015

Quarterly: Index and Categories

Quarterly indices

Quarterly Indices

Q3 2015 to Q4 2019



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

Indexed on July 2014 to June 2015

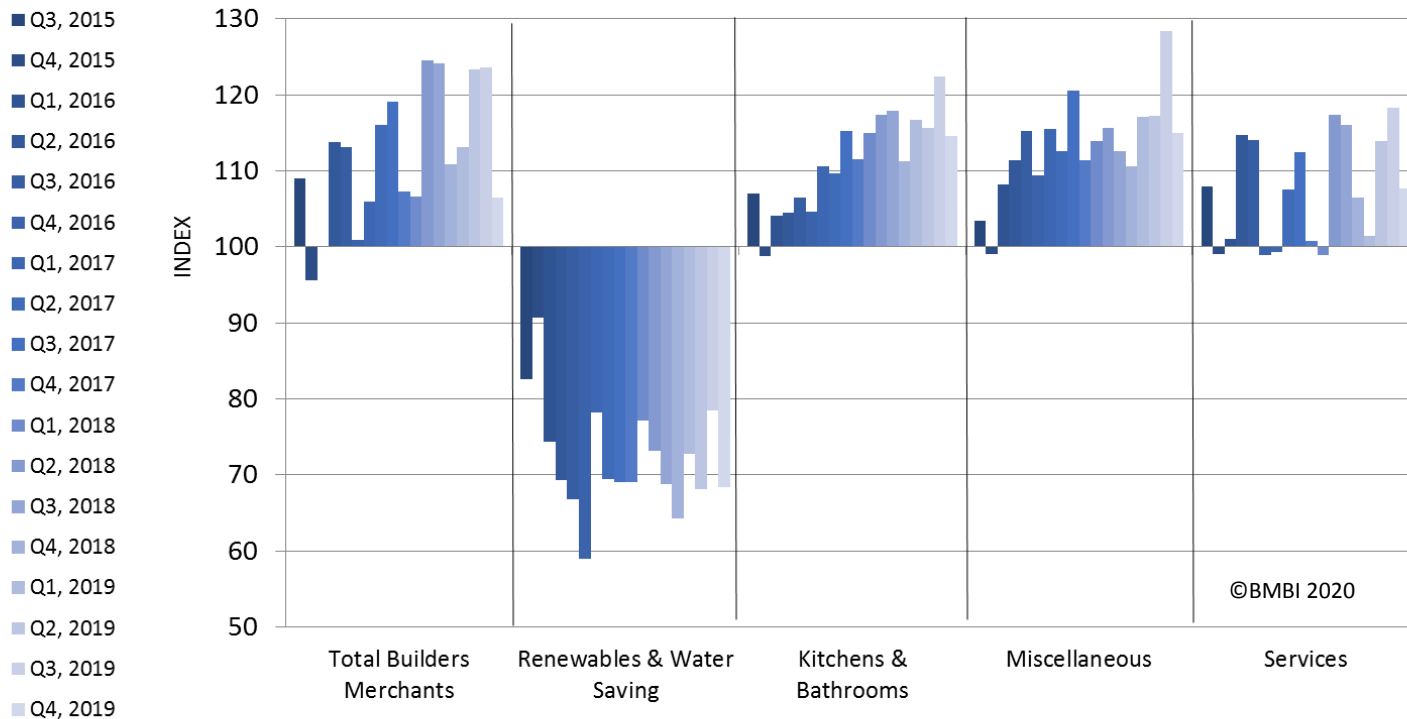
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices

Q3 2015 to Q4 2019



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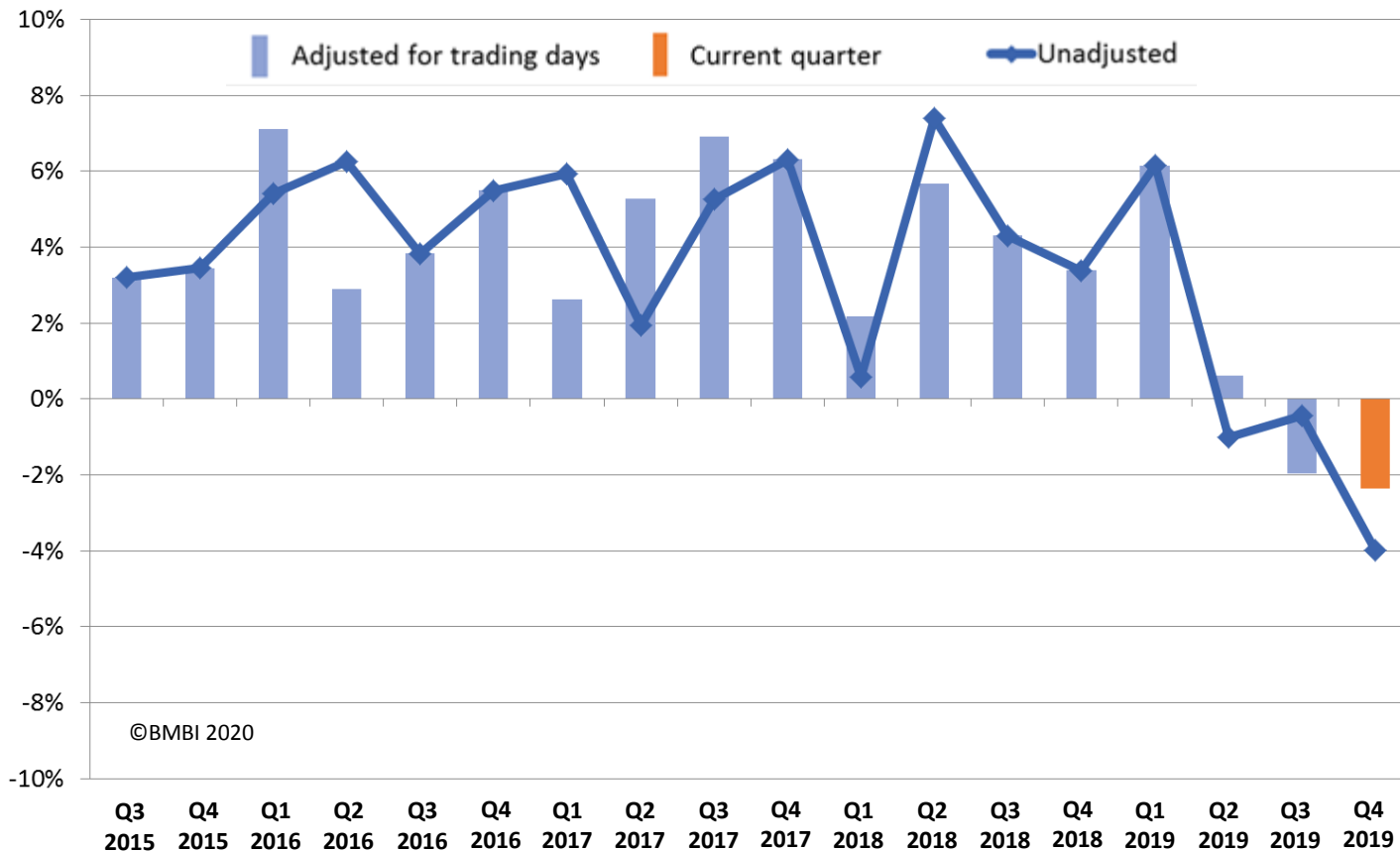
GfK Source: GfK's Builders Merchants Total Category Report July 2015 to December 2019

Indexed on July 2014 to June 2015

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year

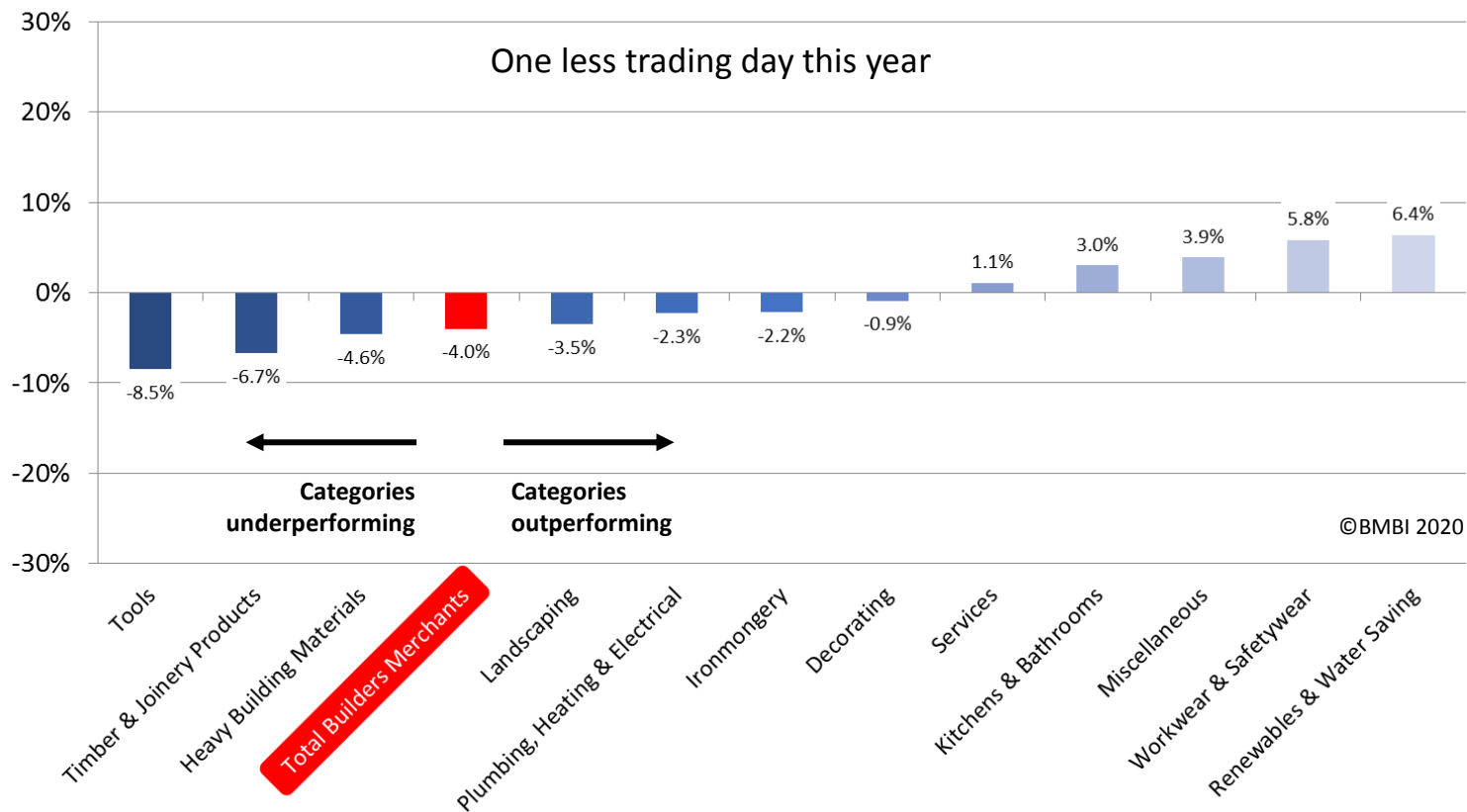


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2019

Quarterly: This Year v Last Year

Q4 2019 sales indices

Quarter 4 2019 index v Quarter 4 2018 index

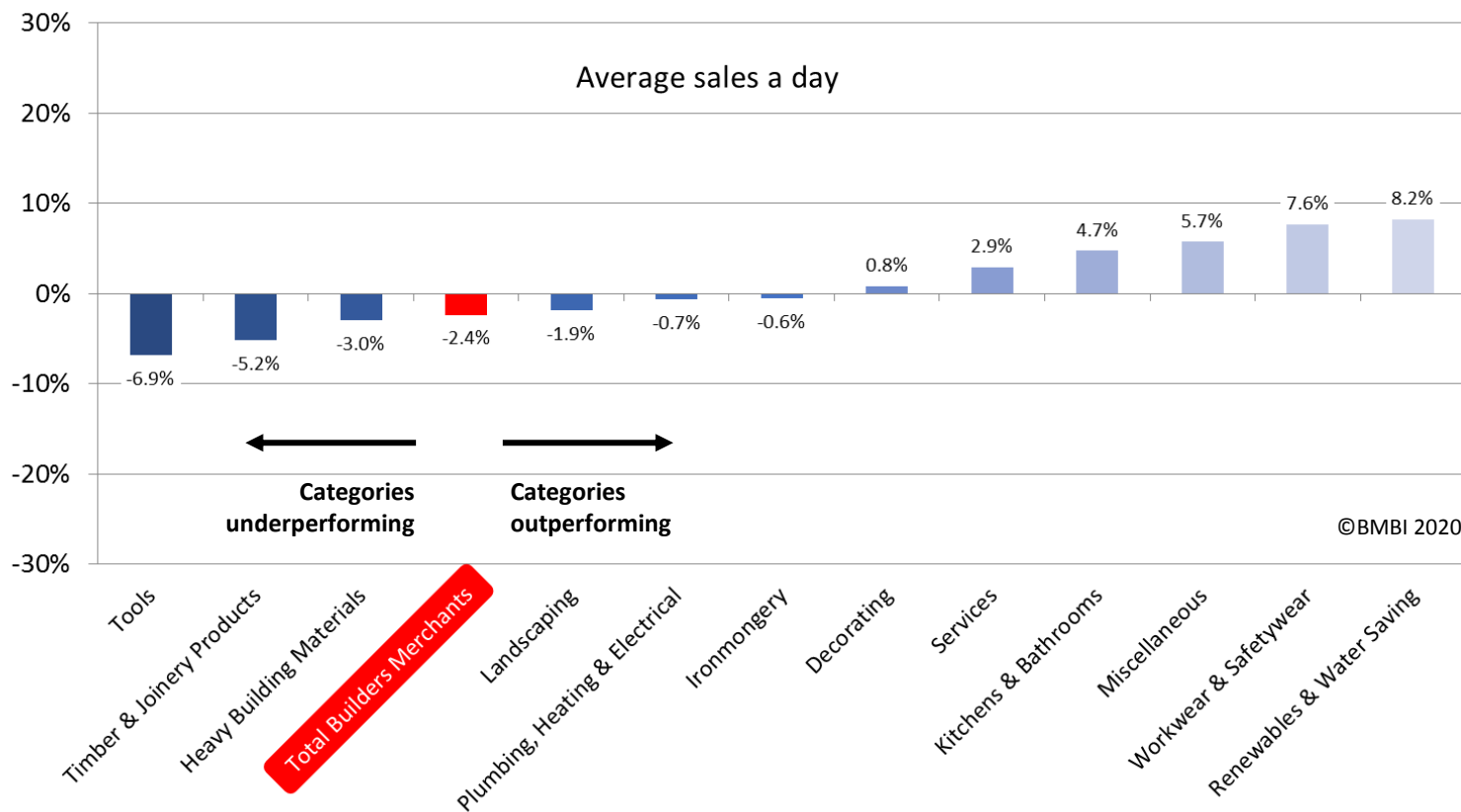


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2019

Quarterly: This Year v Last Year

Q4 2019 average sales a day indices

Quarter 4 2019 index v Quarter 4 2018 index

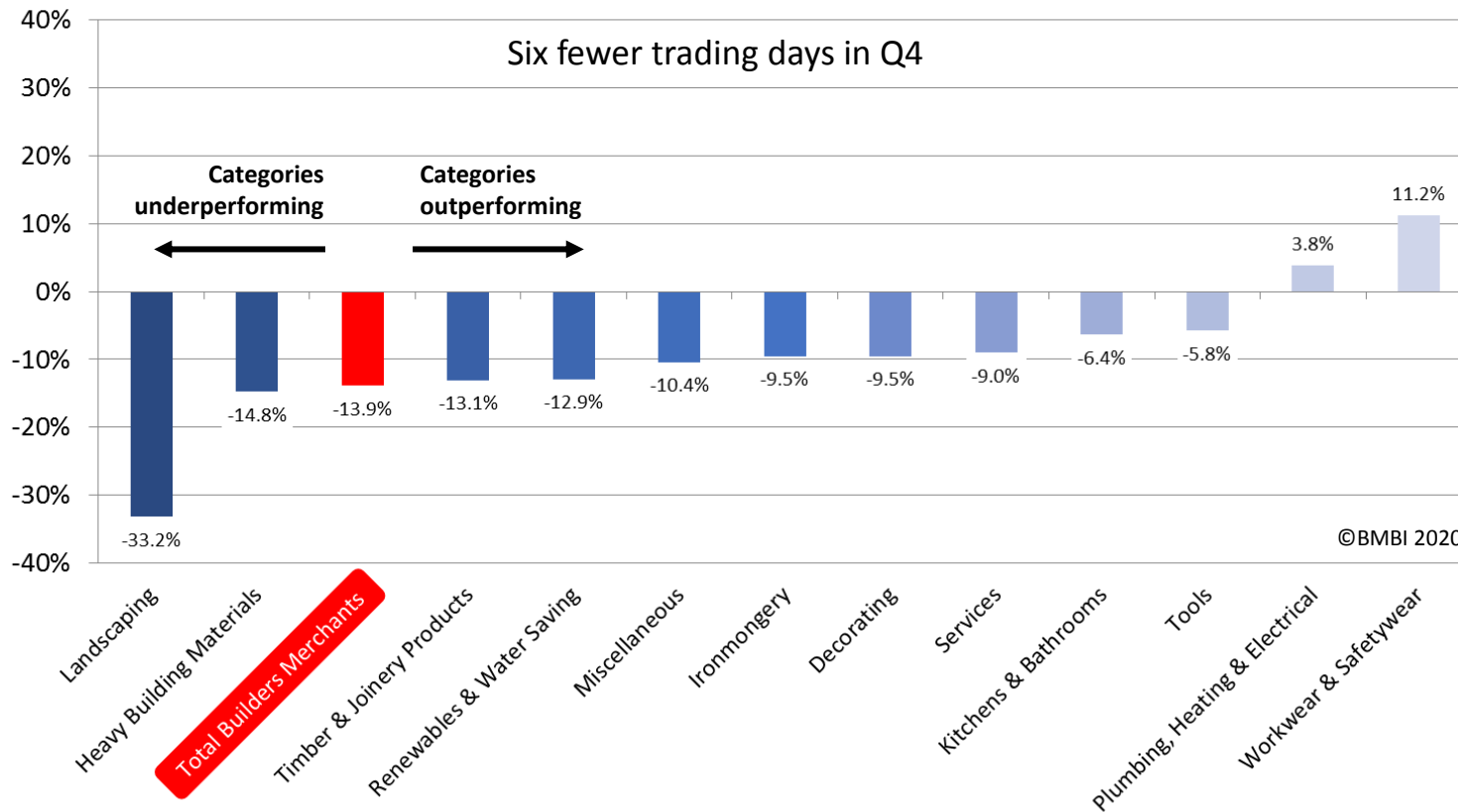


 Source: GfK's Builders Merchants Total Category Report July 2015 to December 2019

Quarterly: Quarter on Quarter

Q4 2019 sales indices

Quarter 4 2019 v Quarter 3 2019

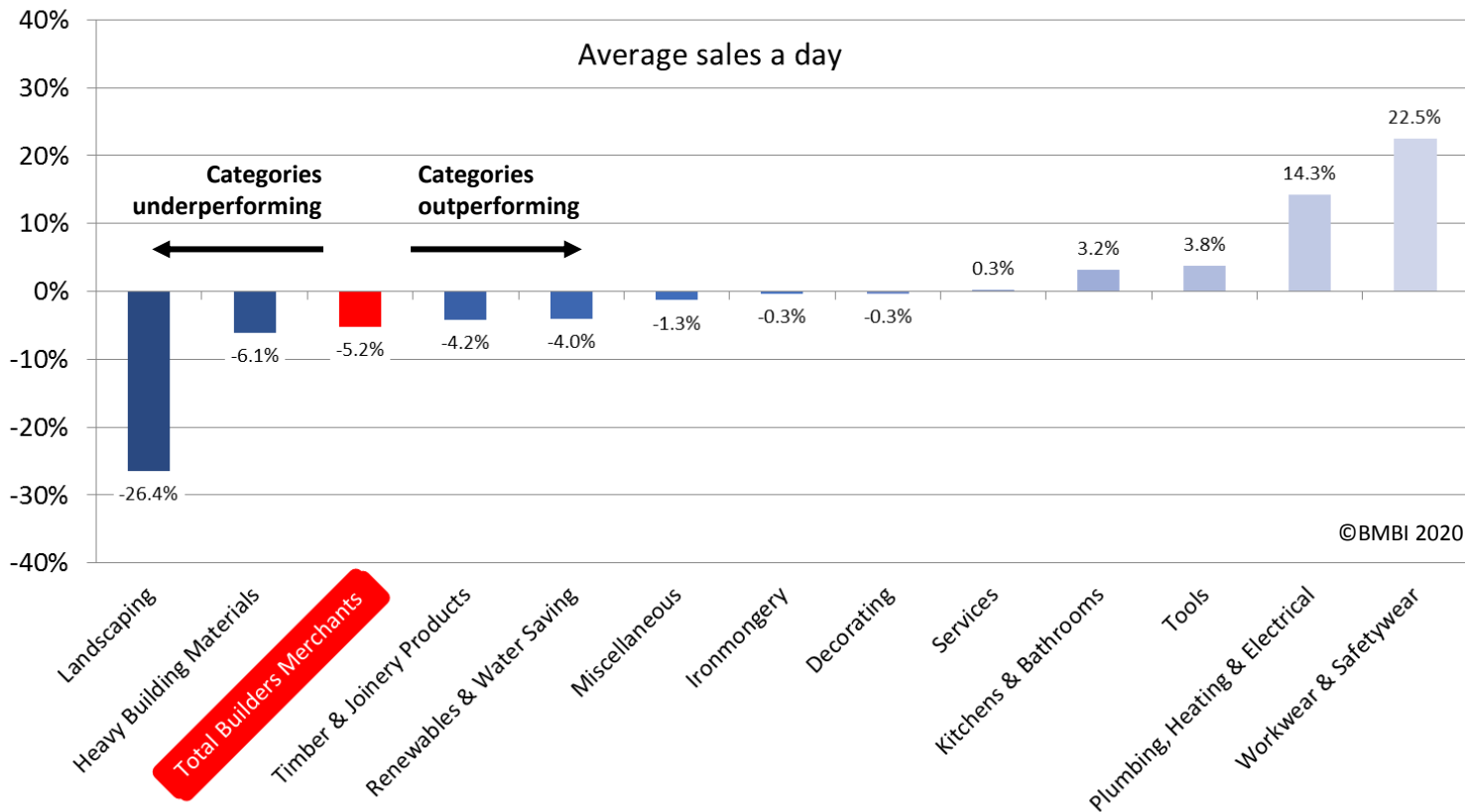


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2019

Quarterly: Quarter on Quarter

Q4 2019 average sales a day indices

Quarter 4 2019 v Quarter 3 2019

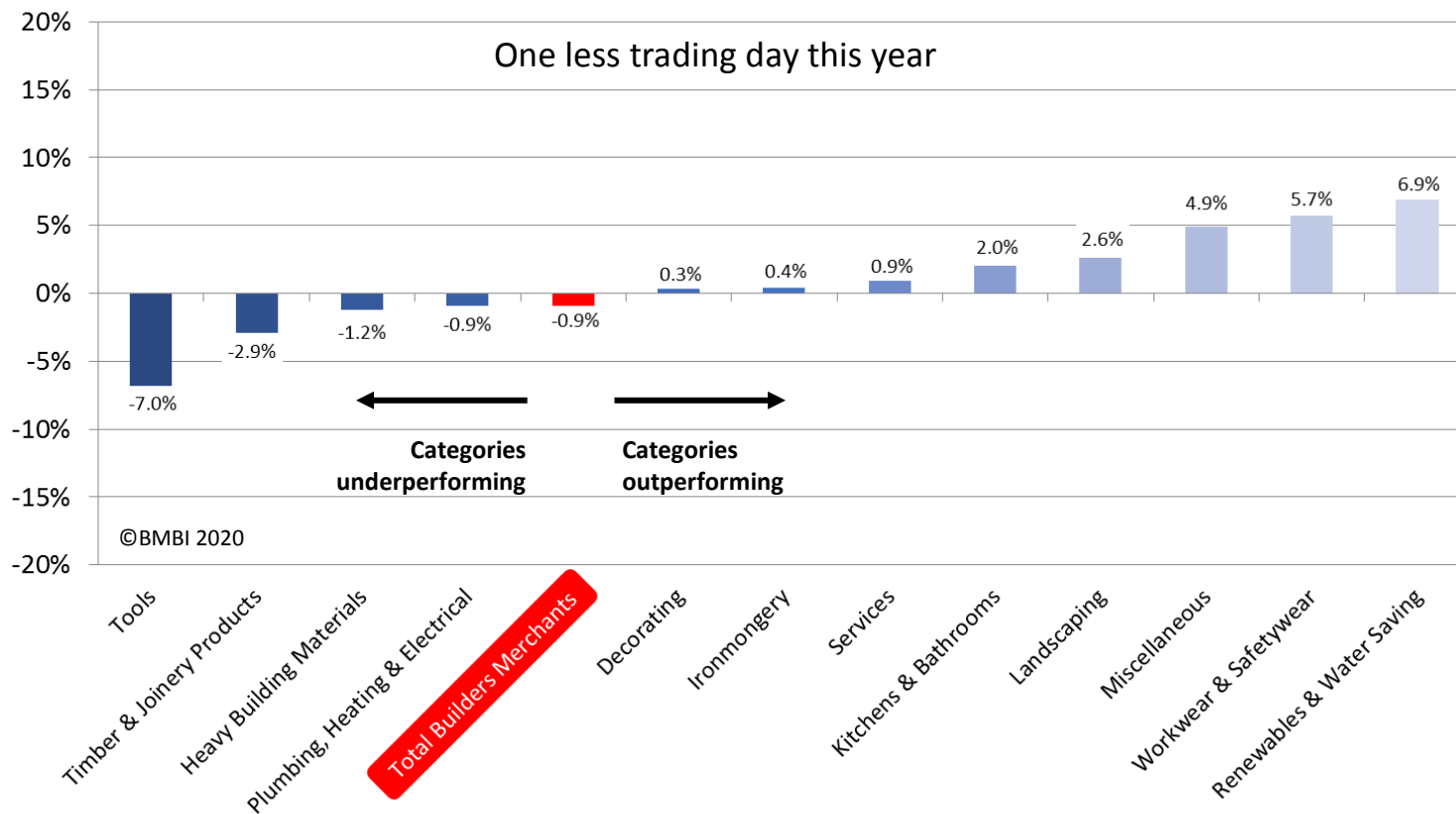


 Source: GfK's Builders Merchants Total Category Report July 2015 to December 2019

Last 12 Months: Year on Year

Rolling 12 months sales indices

12 months Mar 19 to Feb 20 v 12 months Mar 18 to Feb 19



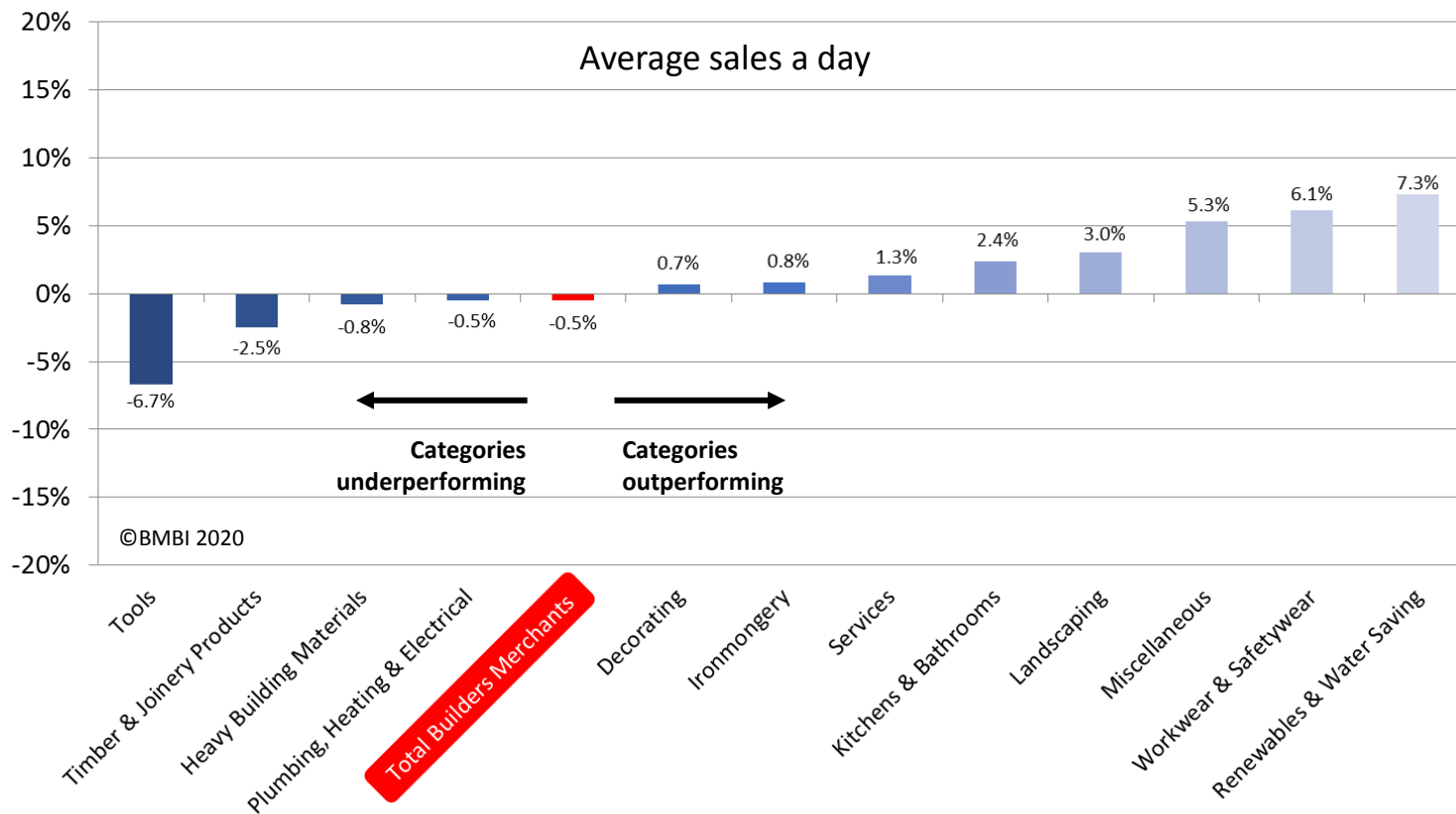
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Last 12 Months: Year on Year

Rolling 12 months
average sales a day indices



12 months Mar 19 to Feb 20 v 12 months Mar 18 to Feb 19

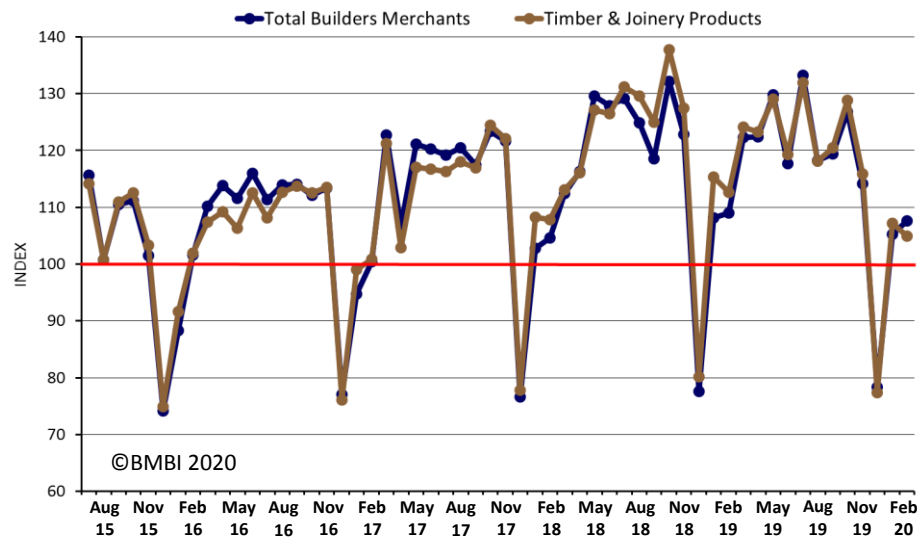


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2019

Monthly: Indices

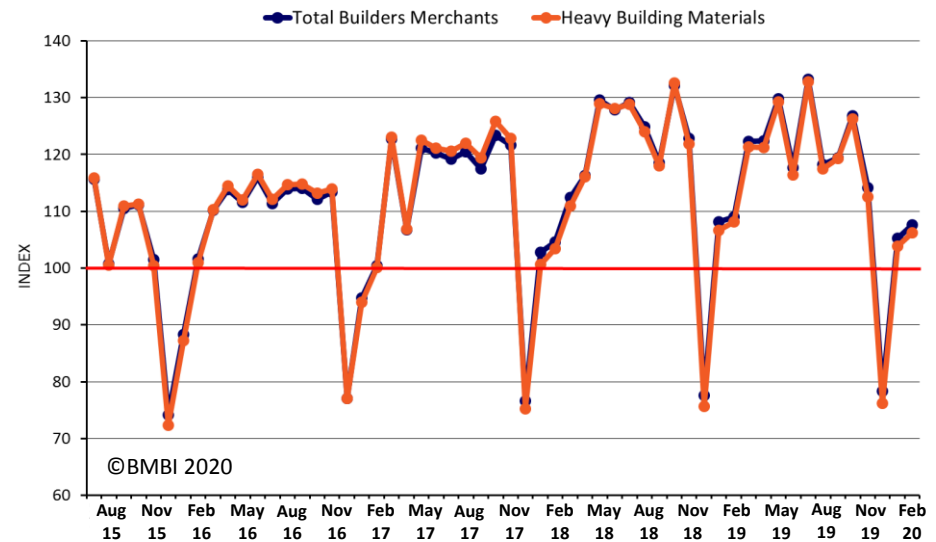
February 2020

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials

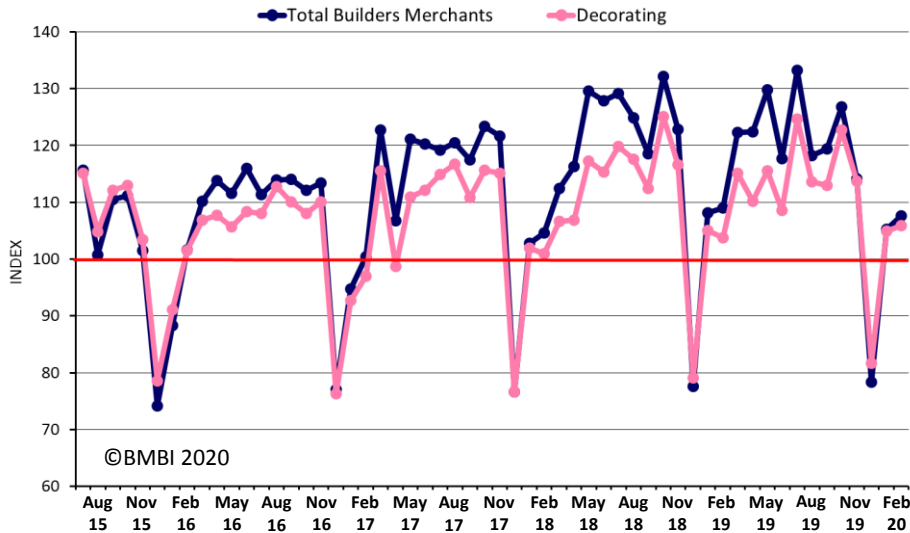


Indexed on July 2014 – June 2015

Monthly: Indices

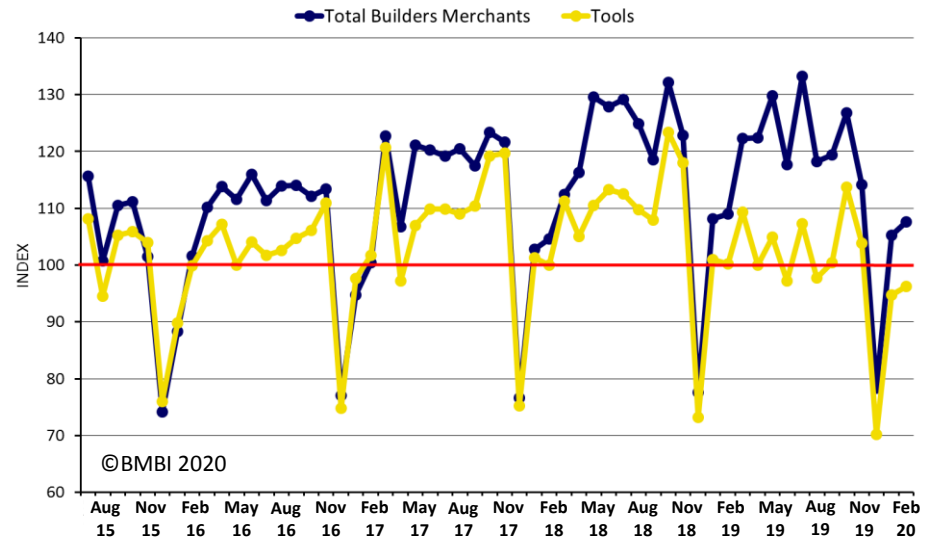
February 2020

Decorating




Indexed on July 2014 – June 2015

Tools



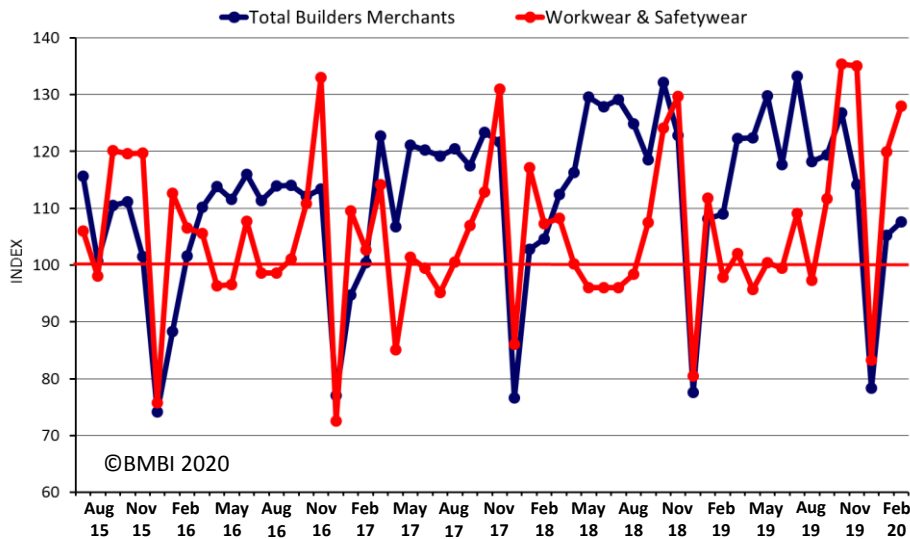
Indexed on July 2014 – June 2015

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: Indices

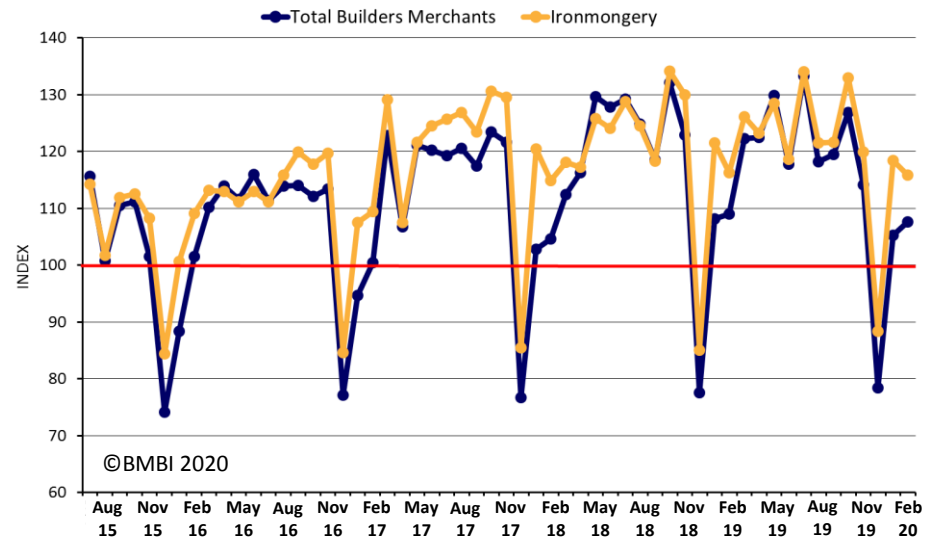
February 2020

Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery

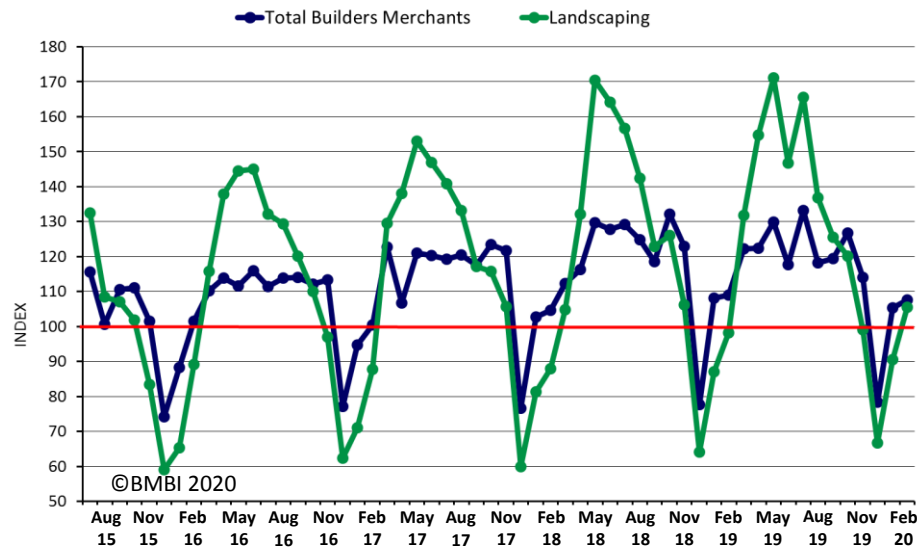


Indexed on July 2014 – June 2015

Monthly: Indices

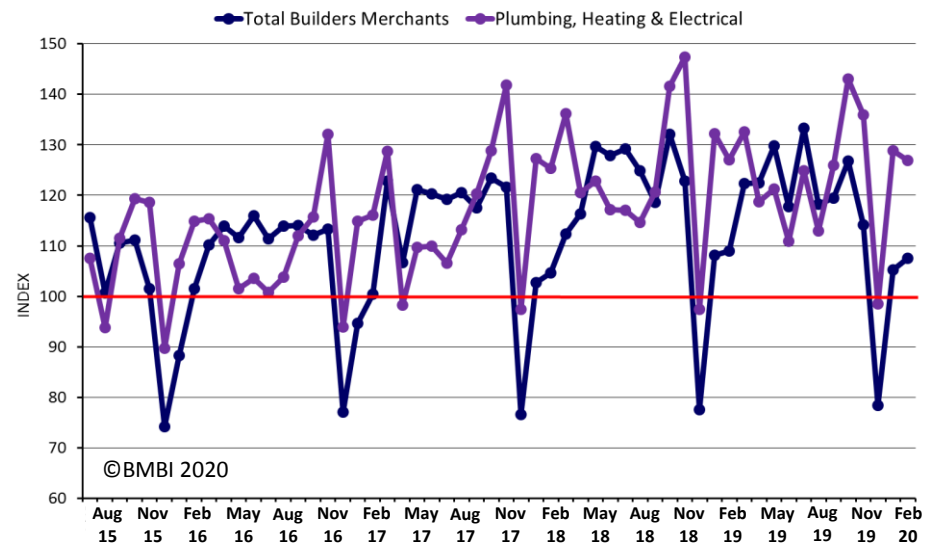
February 2020

Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



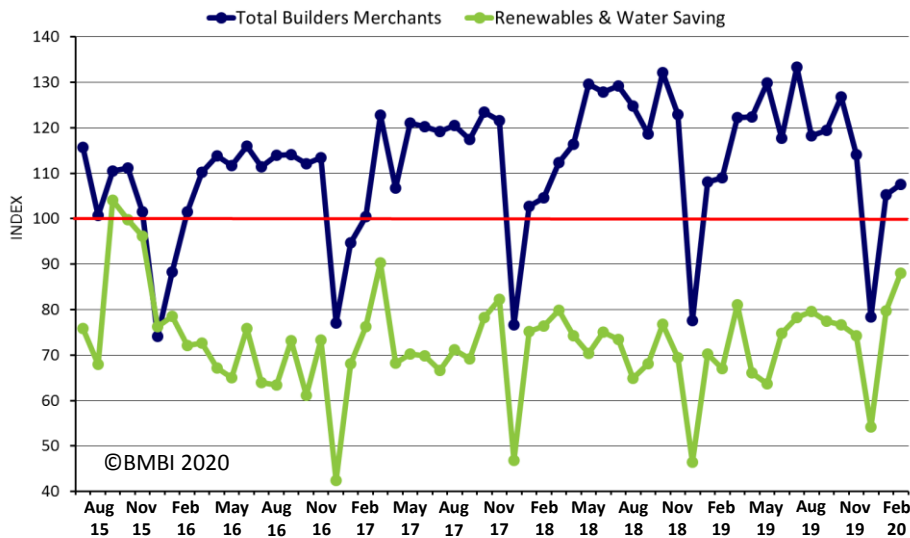
Indexed on July 2014 – June 2015

Monthly: Indices

February 2020

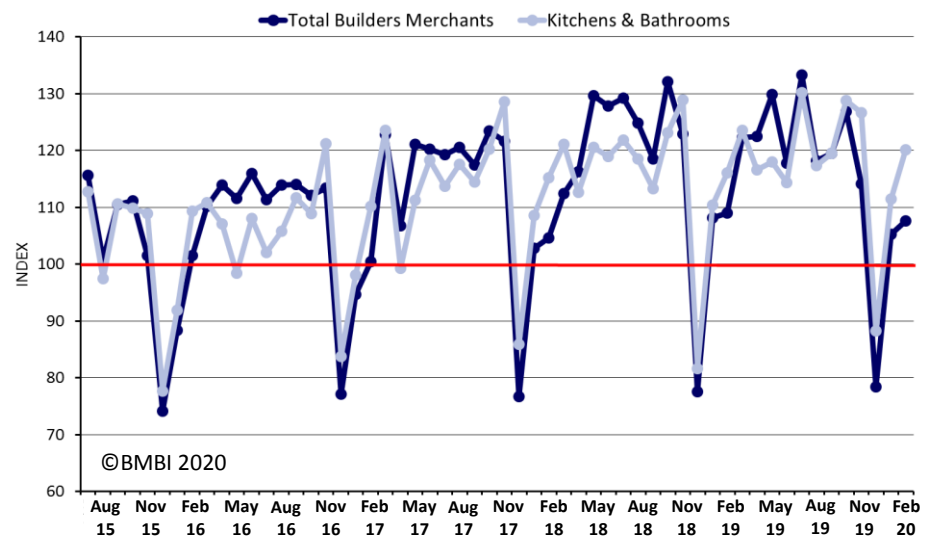


Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



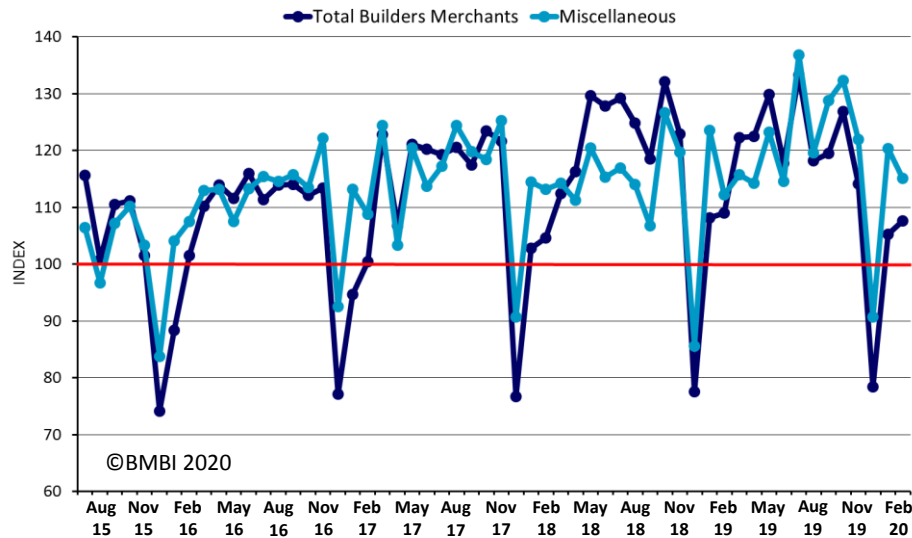
Indexed on July 2014 – June 2015

Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

Monthly: Indices

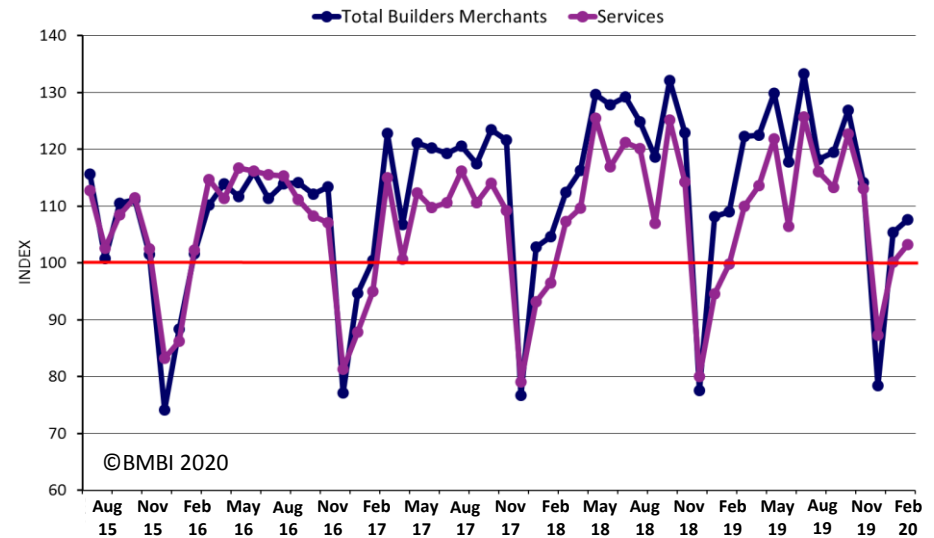
February 2020

Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

Trading Days



Monthly

Index: 20.8

2015											
						Jul 22	Aug 20	Sep 22	Oct 22	Nov 21	Dec 17
2016											
Jan 20	Feb 21	Mar 21	Apr 21	May 20	Jun 22	Jul 21	Aug 22	Sep 22	Oct 21	Nov 22	Dec 17
2017											
Jan 21	Feb 20	Mar 23	Apr 18	May 21	Jun 22	Jul 21	Aug 22	Sep 21	Oct 22	Nov 22	Dec 16
2018											
Jan 22	Feb 20	Mar 21	Apr 20	May 21	Jun 21	Jul 22	Aug 22	Sep 20	Oct 23	Nov 22	Dec 15
2019											
Jan 22	Feb 20	Mar 21	Apr 20	May 21	Jun 20	Jul 23	Aug 21	Sep 21	Oct 23	Nov 21	Dec 15
2020											
Jan 22	Feb 20	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Quarterly

Index: 62.4

2015			
		Q3 64	Q4 60
2016			
Q1 62	Q2 63	Q3 65	Q4 60
2017			
Q1 64	Q2 61	Q3 64	Q4 60
2018			
Q1 63	Q2 62	Q3 64	Q4 60
2019			
Q1 63	Q2 61	Q3 65	Q4 59
2020			
Q1	Q2	Q3	Q4

Half Year

Index: 125

2015	
	H2 124
2016	
H1 125	H2 125
2017	
H1 125	H2 124
2018	
H1 125	H2 124
2019	
H1 124	H2 124
2020	
H1	H2

Full Year

Index: 250

2016
250
2017
249
2018
249
2019
248
2020

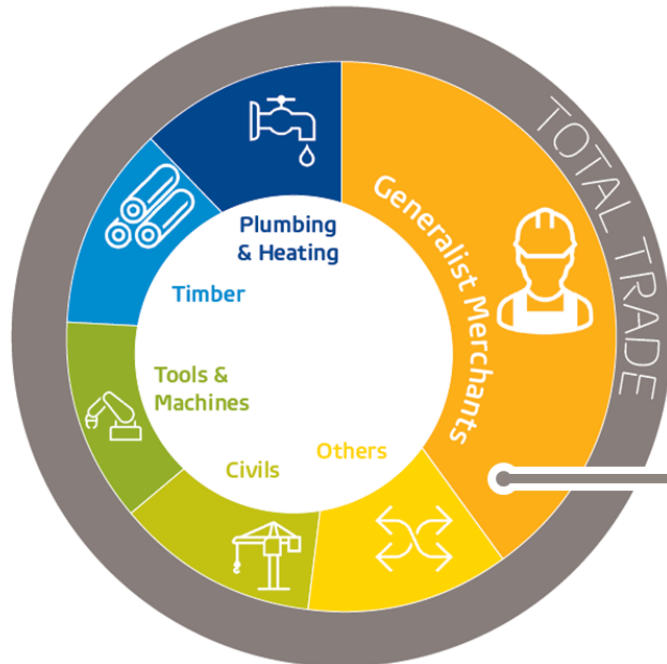
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2020

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

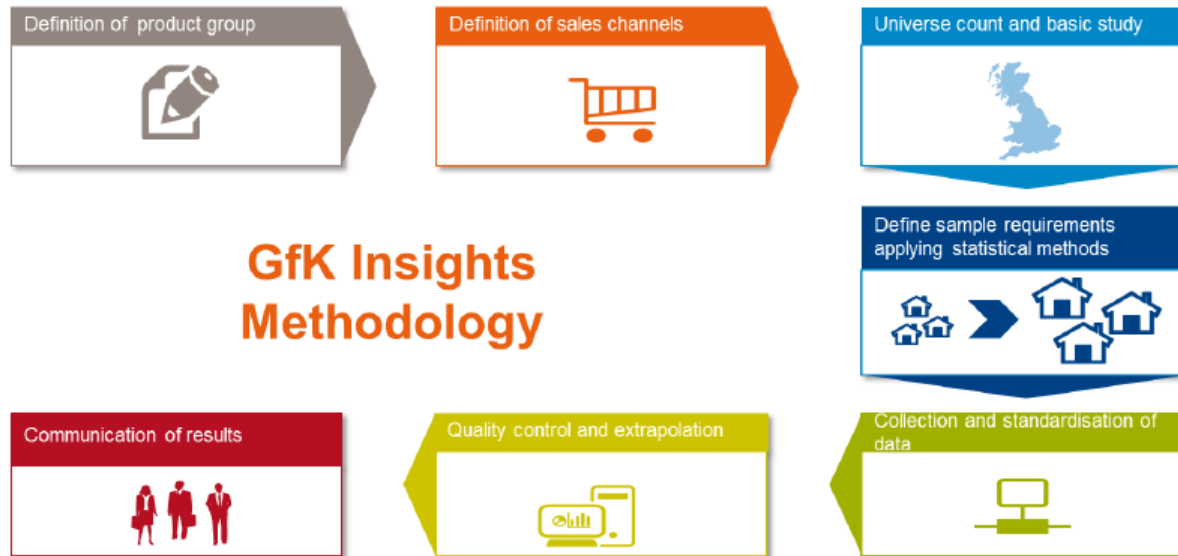
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

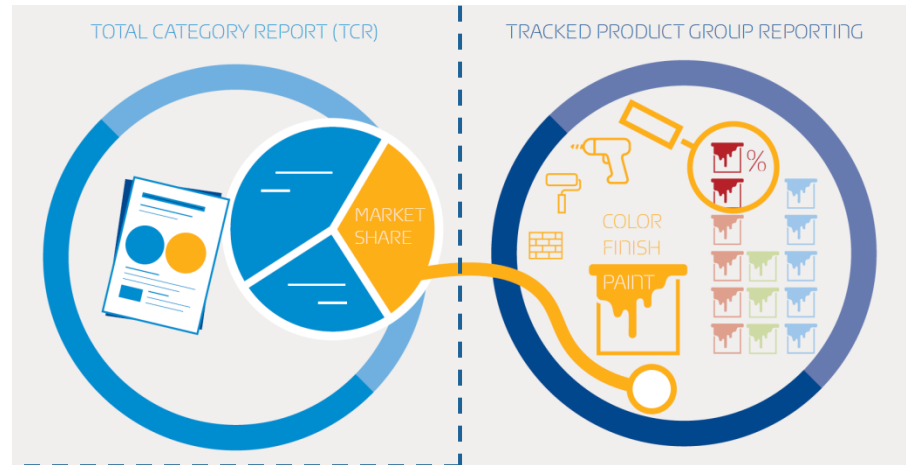
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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

Spring 2020 edition



Builders Merchants Industry Forecast Report

The BMF has released the Spring 2020 edition of its 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 Spring 2020 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 Richard Ellithorne on 024 7685 4984 or email richard.ellithorne@bmf.org.uk



**Builders Merchants
Industry Forecast**
2020 - 2022

Spring edition – £195
Year in Review

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

Contact us

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