

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for April 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 Q1 2020 report.

The collage includes several key reports and charts:

- Monthly and Quarterly Indices:** A line and bar chart showing 'Plumbing, Heating & Electrical' performance for March 2020 and Q1 2020, comparing 2020 data against 2019.
- Macro factors impacting Merchants:** A GfK report discussing the impact of COVID-19 lockdowns on the construction industry.
- Property transactions:** A GfK report showing monthly residential transactions from 2017 to 2019, with a significant dip in early 2020.
- GfK's Product Categories:** A report detailing various product categories such as Plumbing, Heating & Electrical, and Kitchens & Bathrooms, with associated value and volume insights.
- Expert Panel Lead:** A report featuring Lyn Street, Sales & Marketing Manager at Midland Lead, discussing the challenges of the construction industry in early 2020.

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: eCommonSense, British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Hanson Cement, 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.

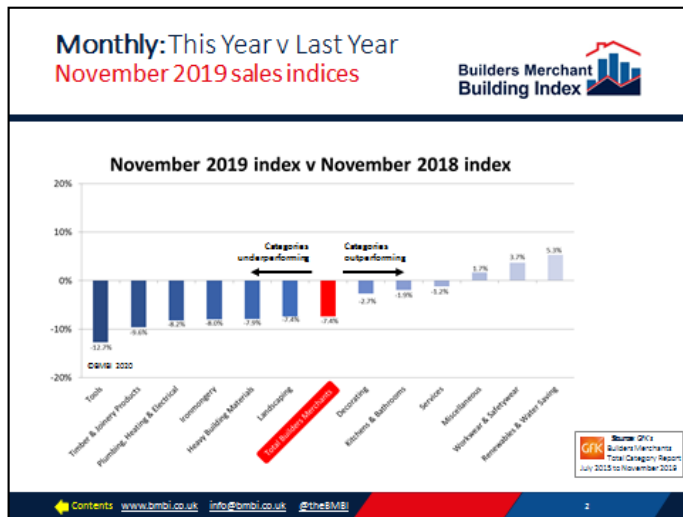
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in acquiring data or getting involved should contact Emile van der Ryst at emile.van-der-ryst@gfk.com.

Trading day differences explained

BMBI reports track changes in Merchants' performance over a variety of time periods. However, the number of trading days in a period can change how we judge relative performance. More trading days in a month could boost total sales, whereas the level of sales a day could be lower.

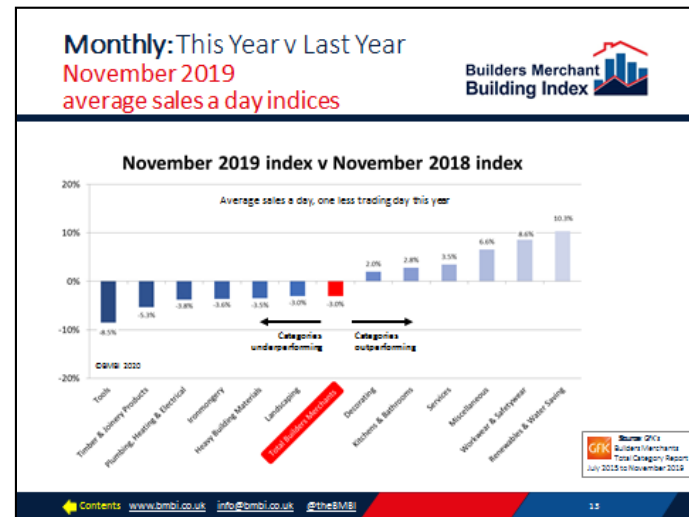
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

Direct comparison of sales indices:



The first of the two charts directly compares revenue in the two periods, regardless of the number of trading days. Total Builders Merchants sales (the red column) were 7.4% lower.

Average sales a day indices comparison:



In the second chart, revenue has been divided by the number of trading days. In this example, revenue in November 2019 has been divided by 21 days, revenue November 2018 by 22 days and the results compared, showing a 3.0% fall in Total Builders Merchants sales activity (the red column) stripped of trading day differences.

The charts provide two valid views of the same data. Direct comparisons (on the left) show what happened in absolute numbers – average sales a day (on the right) enables trading day differences to be set aside.

Overview

April sales collapse under Covid-19 lockdown

This month's BMBI report is unlike any other. The Government enforced Covid-19 lockdown came late in March, so had a limited impact last month. However, April took the full force, with many trades not working and most merchants temporarily closing branches or providing a restricted service only for essential sectors or emergencies. As a result, this report contains unprecedented figures

Year-on-Year

Total Builders Merchants value sales in April were down 76.3% compared with April 2019. All categories saw heavy falls, with Workwear & Safetywear least affected (-60.2%), and Tools (-90.0%) hit hardest. Kitchens & Bathrooms (-86.8%) and Decorating (-81.6%) were also particularly weak.

Month-on-Month

Total merchant value sales in April were 72.1% below March 2020, with two less trading days this month. All categories were severely hit with Services (-59.0%) and Landscaping (-64.5%) the least affected. Tools (-87.4%) and Kitchens & Bathrooms (-85.3%) were weakest. Average sales a day, which removes trading day differences, were 69.3% lower overall than in March

Other periods

Sales in the first four months of 2020 were 25.2% lower than in January to April 2019, with one more trading day this year. Workwear & Safetywear (+4.4%) was the only category that sold more – having experienced a significant uplift in March driven by strong demand for protective equipment. The two weakest categories were Tools (-31.5%) and Timber & Joinery Products (-28.7%). Average sales a day in the first four months were 26.0% lower than last year.

The 12 months May 2019 to April 2020 were down 9.9% on the same period a year earlier. Three categories sold more, led by Workwear & Safetywear (+5.0%). Tools (-15.8%) and Timber & Joinery Products (-12.3%) did least well.

Index

April's BMBI index was 29.0 and all categories were well down.

Total Builders Merchants sales in April were down 76.3% compared with April 2019. All categories saw heavy falls. Tools (-90.0%) was hit hardest

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 2020 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: Q1 2020 Report](#)

Expert for Bricks & Roof Tiles:



Kevin Tolson,
Commercial Director
Wienerberger UK

[Read latest Comment: Q1 2020 Report](#)

Expert for Website & Product Data Management Solutions:



Andy Scothern
Managing Director
eCommonSense

[Read latest Comment: Q1 2020 Report](#)

Expert for Civils & Green Infrastructure:



Steve Durdant-Hollamby,
Managing Director
Polypipe Civils

[Read latest Comment: Q1 2020 Report](#)

Expert for Lead:



Lynn Street
Sales & Marketing Manager
Midland Lead

[Read latest Comment: Q1 2020 Report](#)

Expert for Roof Windows:



John Duffin
Managing Director
Keylite Roof Windows

[Read latest Comment: Q1 2020 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q1 2020 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: Q1 2020 Report](#)

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



Malcolm Gough
Group Sales & Marketing Director
Talasey Group

[Read latest Comment: Q1 2020 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q1 2020 Report](#)

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Hanson Cement

[Read latest Comment: Q1 2020 Report](#)

Expert for Paint:



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

[Read latest Comment: Q1 2020 Report](#)

Expert for Water Heating:



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

[Read latest Comment: Q1 2020 Report](#)

Expert for Shower Enclosures and Showering:



Mike Tattam
Sales & Marketing Director
Lakes

[Read latest Comment: Q1 2020 Report](#)

Interested in joining our panel of Experts?:



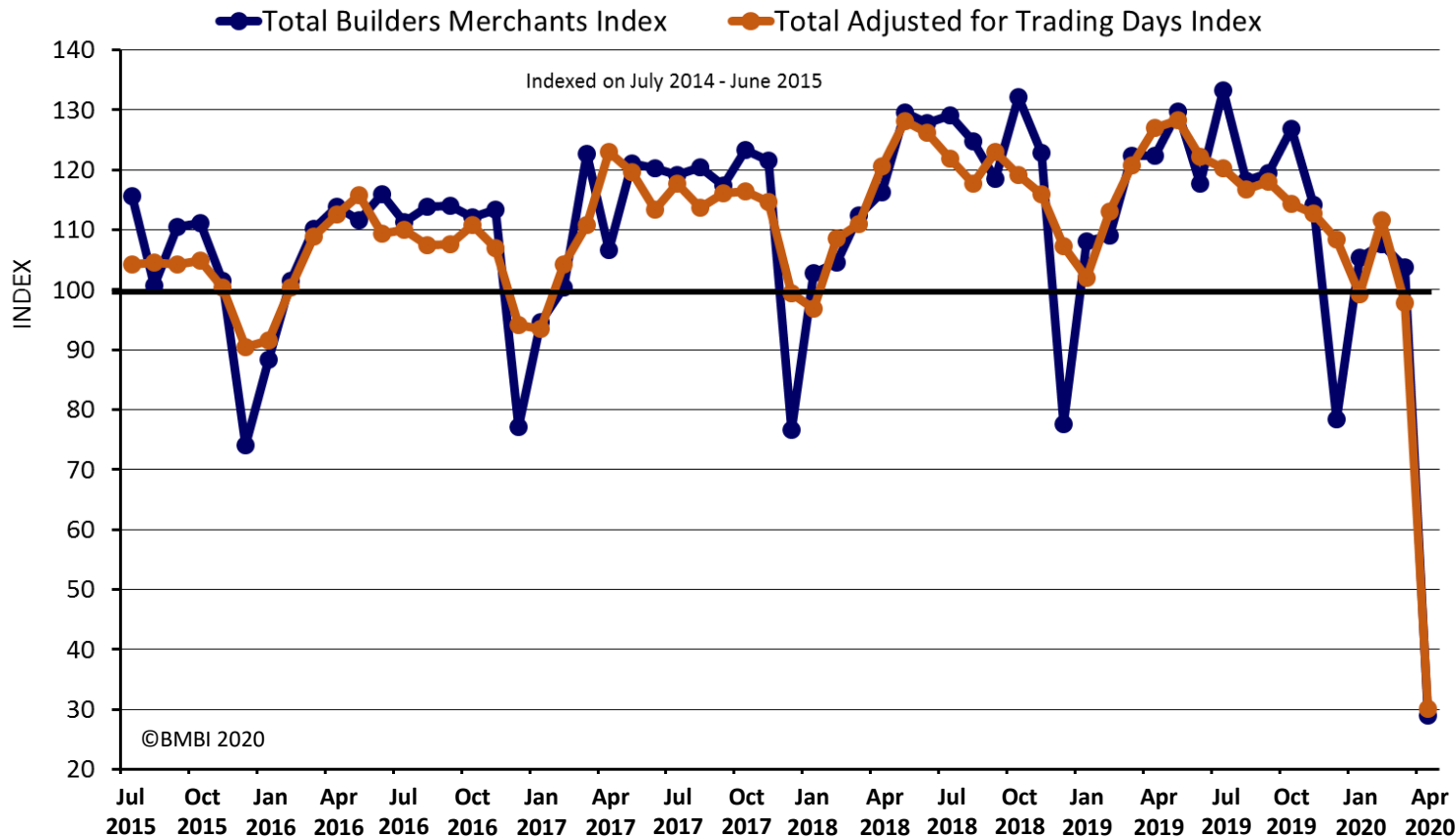
If you have a finger on the pulse of your industry sector and would like to join the Expert panel, please contact Tom Rigby at MRA Marketing:

tom@mra-marketing.com

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 April 2020

Monthly: Index and Categories

April 2019* – April 2020

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



		2019									2020			
MONTHLY SALES VALUE INDEX	Index	Apr	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Total Builders Merchants	100	122.4	129.8	117.7	133.3	118.2	119.4	126.8	114.1	78.4	105.3	107.6	103.8	29.0
Timber & Joinery Products	100	123.3	128.9	119.3	131.9	118.1	120.5	128.8	115.9	77.4	107.2	104.9	100.8	25.8
Heavy Building Materials	100	121.3	129.4	116.5	132.8	117.5	119.3	126.3	112.5	76.3	103.8	106.2	104.4	30.7
Decorating	100	110.1	115.5	108.5	124.7	113.6	112.9	122.7	113.7	81.6	104.9	105.8	96.7	20.3
Tools	100	100.0	104.9	97.2	107.3	97.7	100.4	113.7	103.9	70.3	94.8	96.2	80.0	10.0
Workwear & Safetywear	100	95.8	100.5	99.5	109.1	97.3	111.7	135.4	135.1	83.2	119.9	128.0	139.3	38.1
Ironmongery	100	123.2	128.4	118.6	134.0	121.6	121.7	132.9	119.9	88.4	118.4	115.9	103.8	27.4
Landscaping	100	154.6	171.1	146.7	165.5	136.8	125.5	120.2	99.0	66.7	90.5	105.5	111.7	39.6
Plumbing, Heating & Electrical	100	118.7	121.3	110.8	124.9	112.9	126.0	143.0	135.9	98.5	128.9	126.9	107.1	26.3
Renewables & Water Saving	100	66.1	63.6	74.8	78.3	79.6	77.5	76.7	74.2	54.1	79.7	88.0	69.9	15.0
Kitchens & Bathrooms	100	115.9	117.3	113.6	130.2	117.4	119.5	128.7	126.7	88.3	111.4	120.1	104.0	15.3
Miscellaneous	100	114.2	123.1	114.6	136.8	119.6	128.7	132.4	121.9	90.8	120.3	115.1	152.9	36.9
Services	100	113.6	121.8	106.5	125.6	116.0	113.2	122.7	113.1	87.2	100.1	103.2	102.7	42.2

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

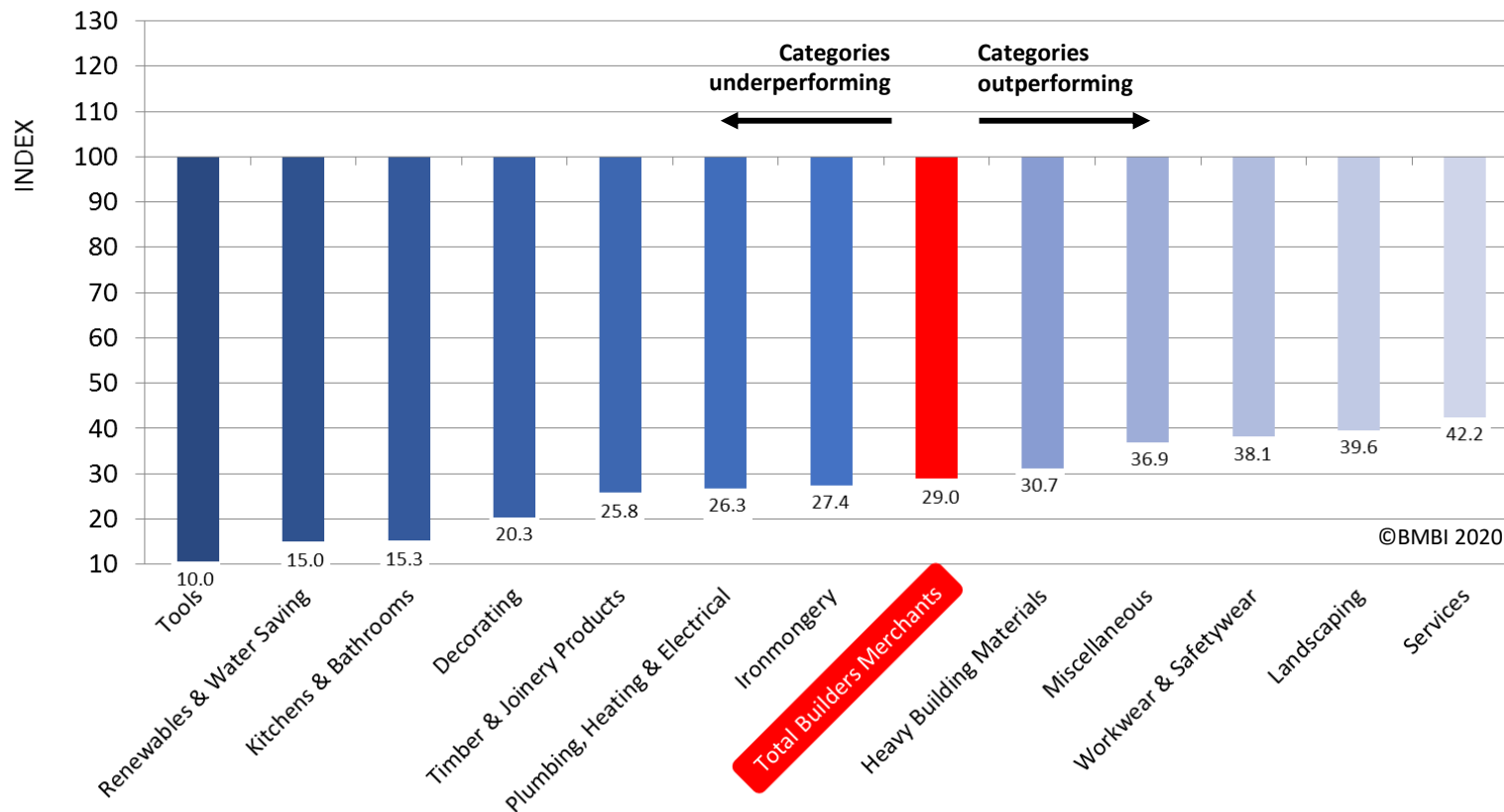
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Monthly: Index and Categories

April 2020 index



April 2020 Index



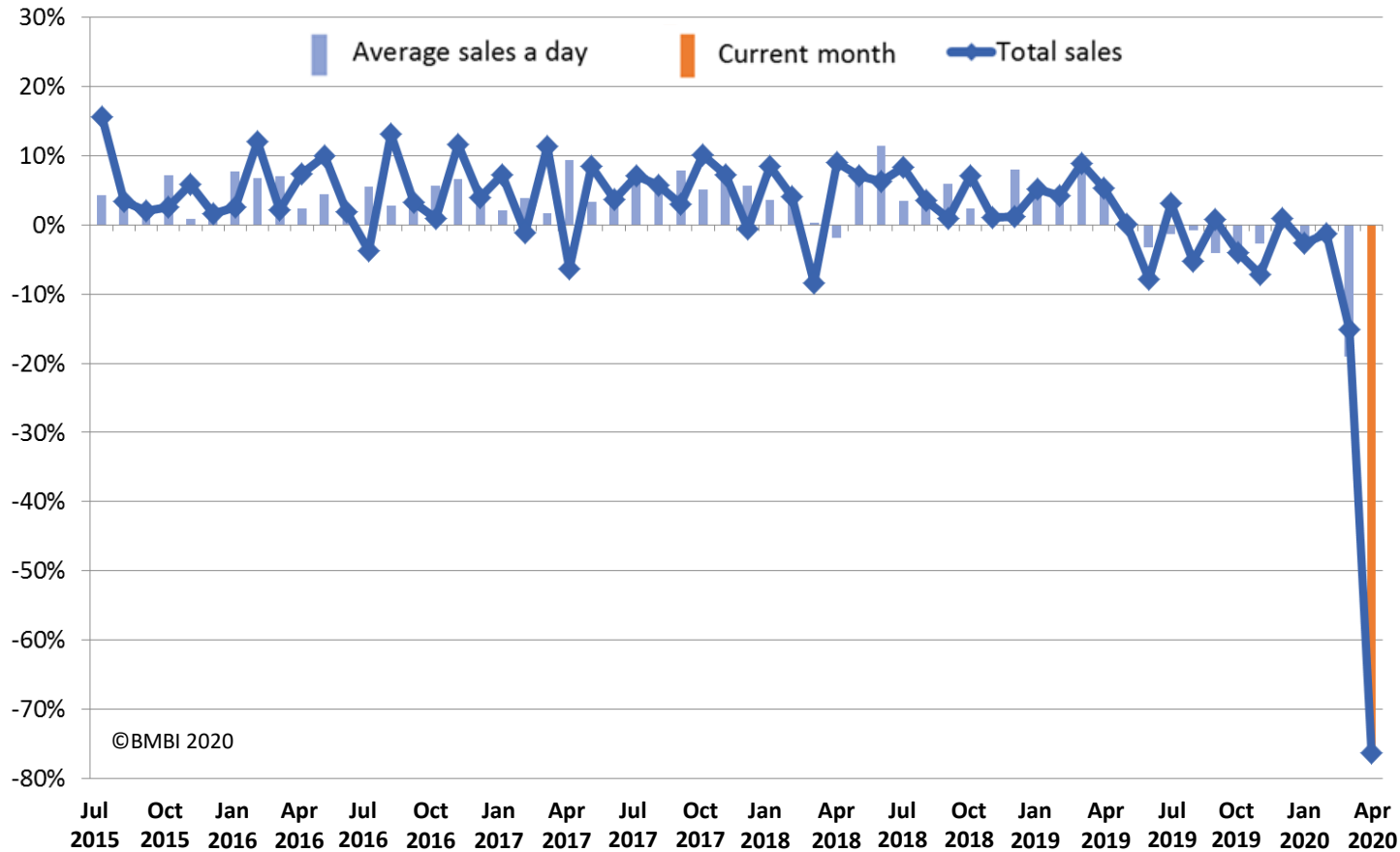
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



Monthly: Year on Year



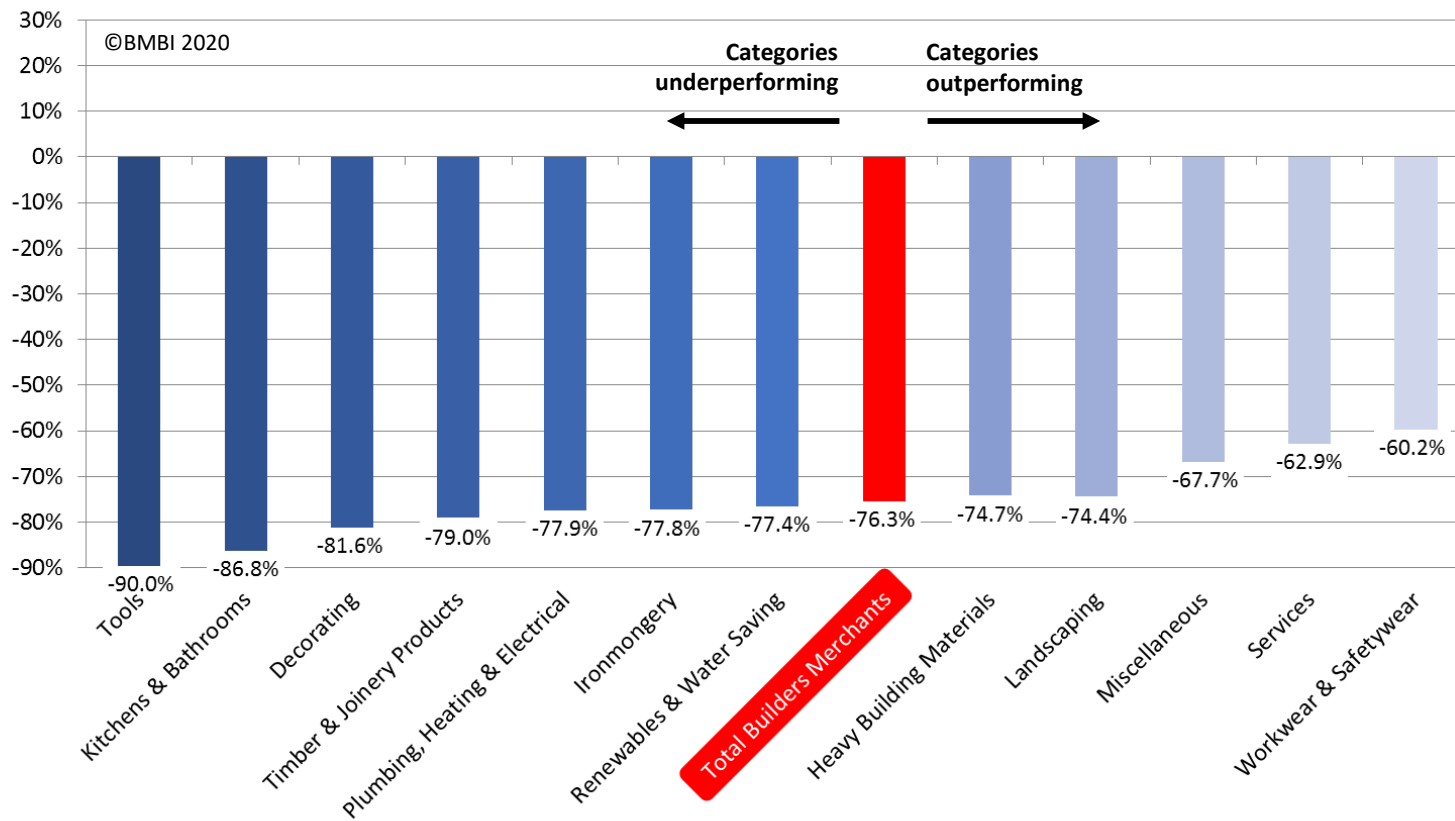
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Monthly: This Year v Last Year

April 2020 sales indices



April 2020 index v April 2019 index



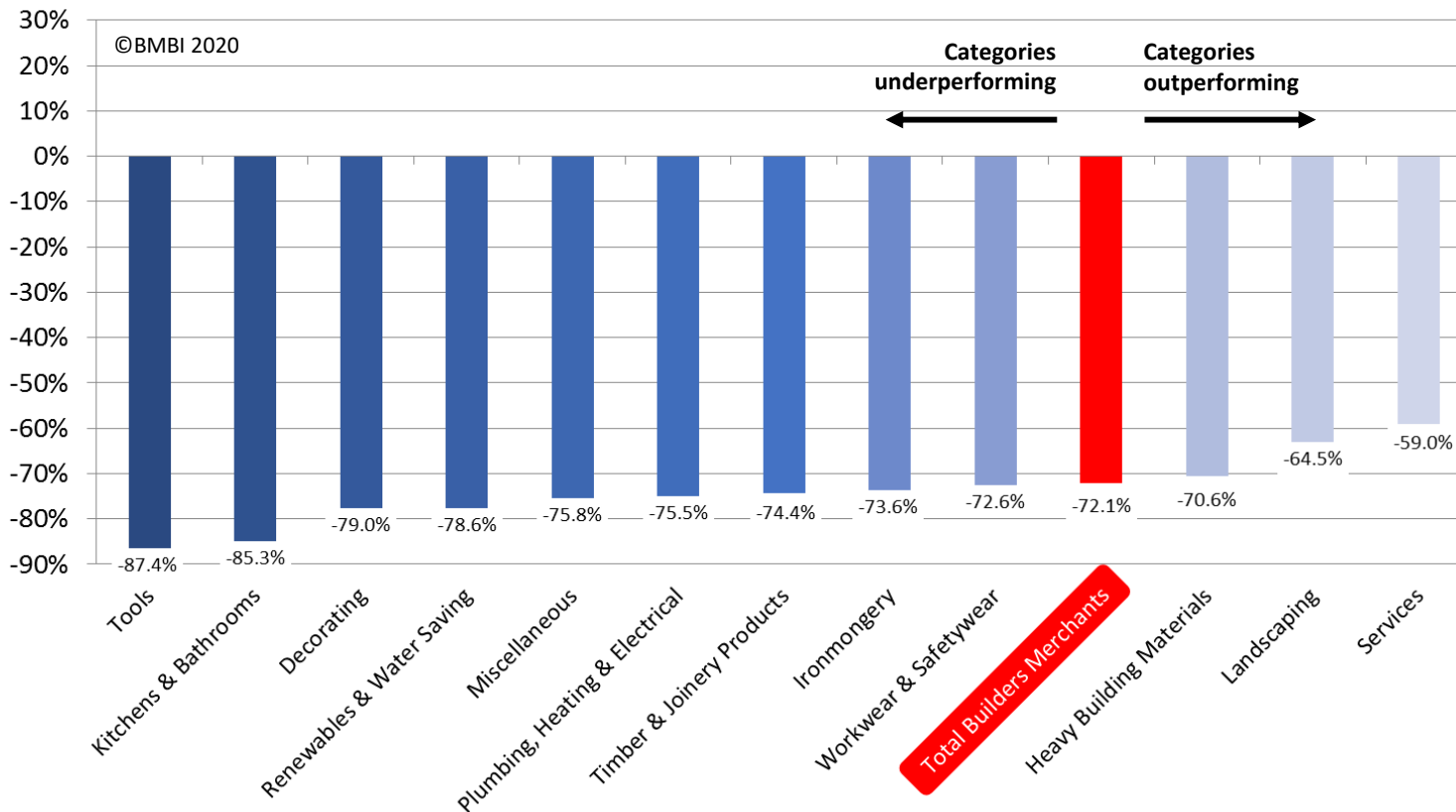
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Monthly: This Month v Last Month

April 2020 sales indices



April 2020 index v March 2020 index



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

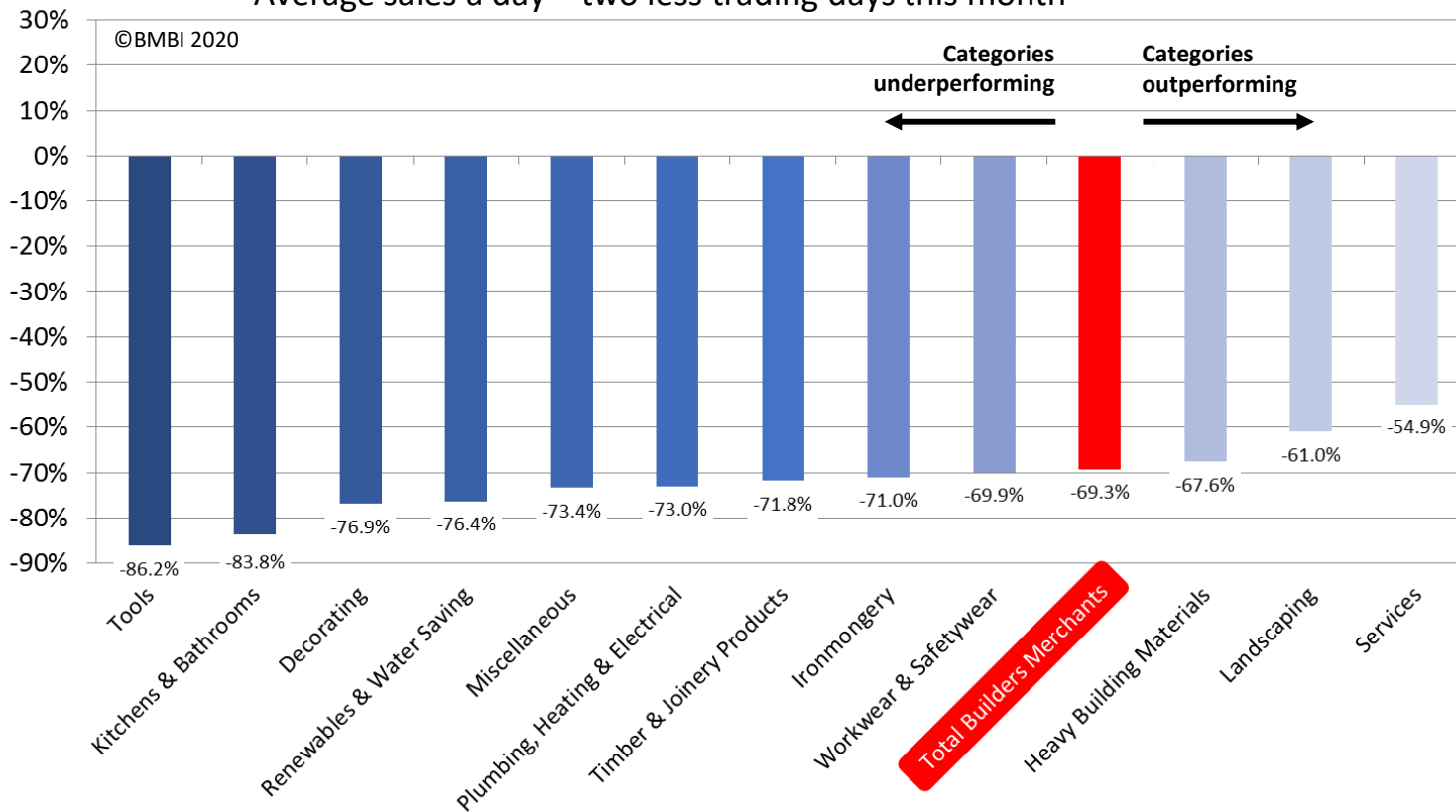
Monthly: This Month v Last Month

April 2020 average sales a day indices



April 2020 index v March 2020 index

Average sales a day – two less trading days this month*



*Some merchants temporarily closed branches in April 2020 and this will have affected trading day comparisons.

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

Quarterly: Index and Categories


Quarter 1 2019* to Quarter 1 2020

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q1 2019	Q2 2019	Q3 2019	Q4 2019	Q1 2020
Total Builders Merchants	100	113.1	123.3	123.6	106.4	105.6
Timber & Joinery Products	100	117.4	123.8	123.5	107.4	104.3
Heavy Building Materials	100	112.1	122.4	123.2	105.0	104.8
Decorating	100	108.0	111.4	117.1	106.0	102.5
Tools	100	103.5	100.7	101.8	96.0	90.3
Workwear & Safetywear	100	103.9	98.6	106.0	117.9	129.1
Ironmongery	100	121.3	123.4	125.8	113.8	112.7
Landscaping	100	105.7	157.5	142.6	95.3	102.6
Plumbing, Heating & Electrical	100	130.6	117.0	121.3	125.8	121.0
Renewables & Water Saving	100	72.8	68.2	78.5	68.3	79.2
Kitchens & Bathrooms	100	116.7	115.6	122.3	114.6	111.9
Miscellaneous	100	117.2	117.3	128.4	115.0	129.5
Services	100	101.4	114.0	118.3	107.7	102.0

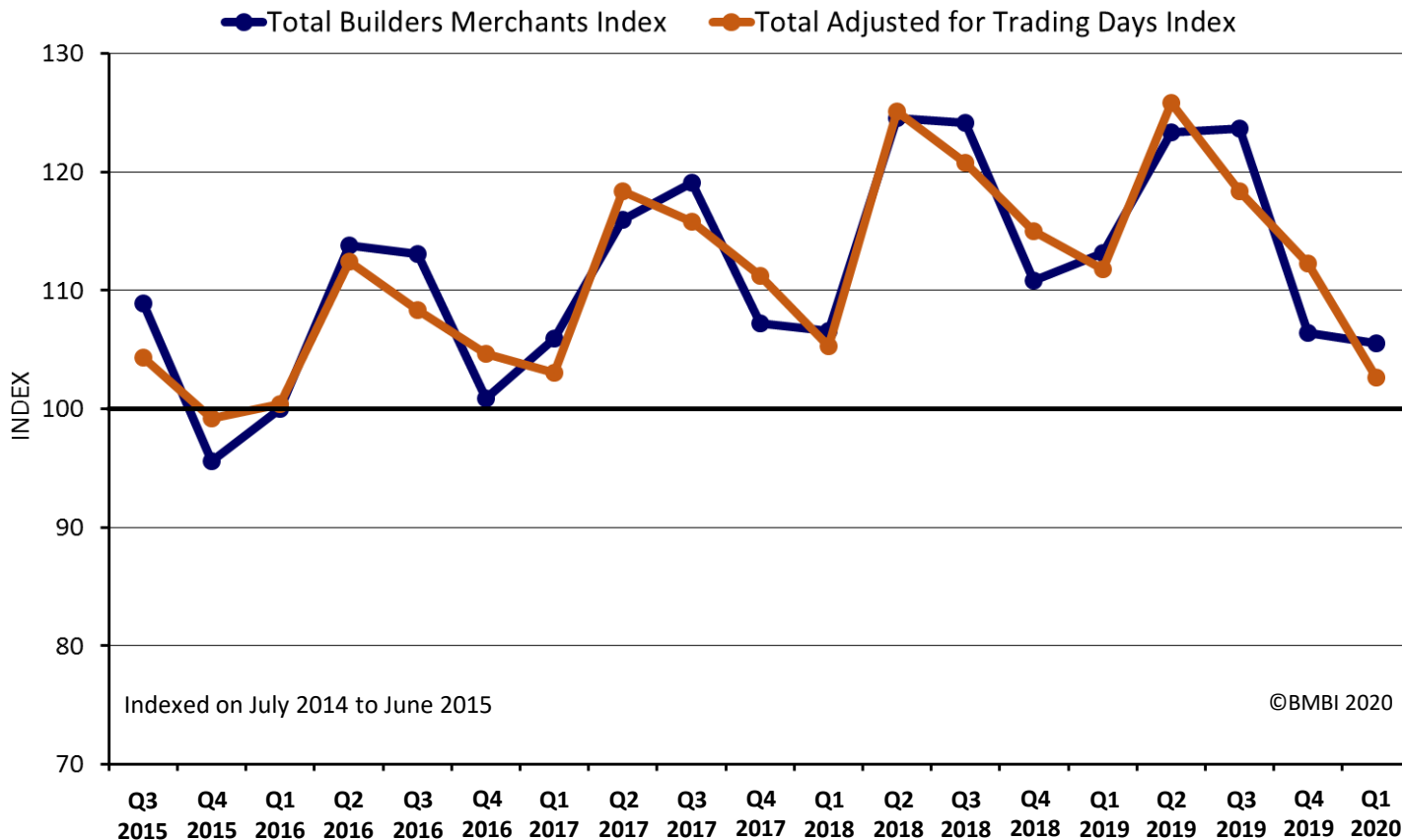
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.


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

Quarterly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



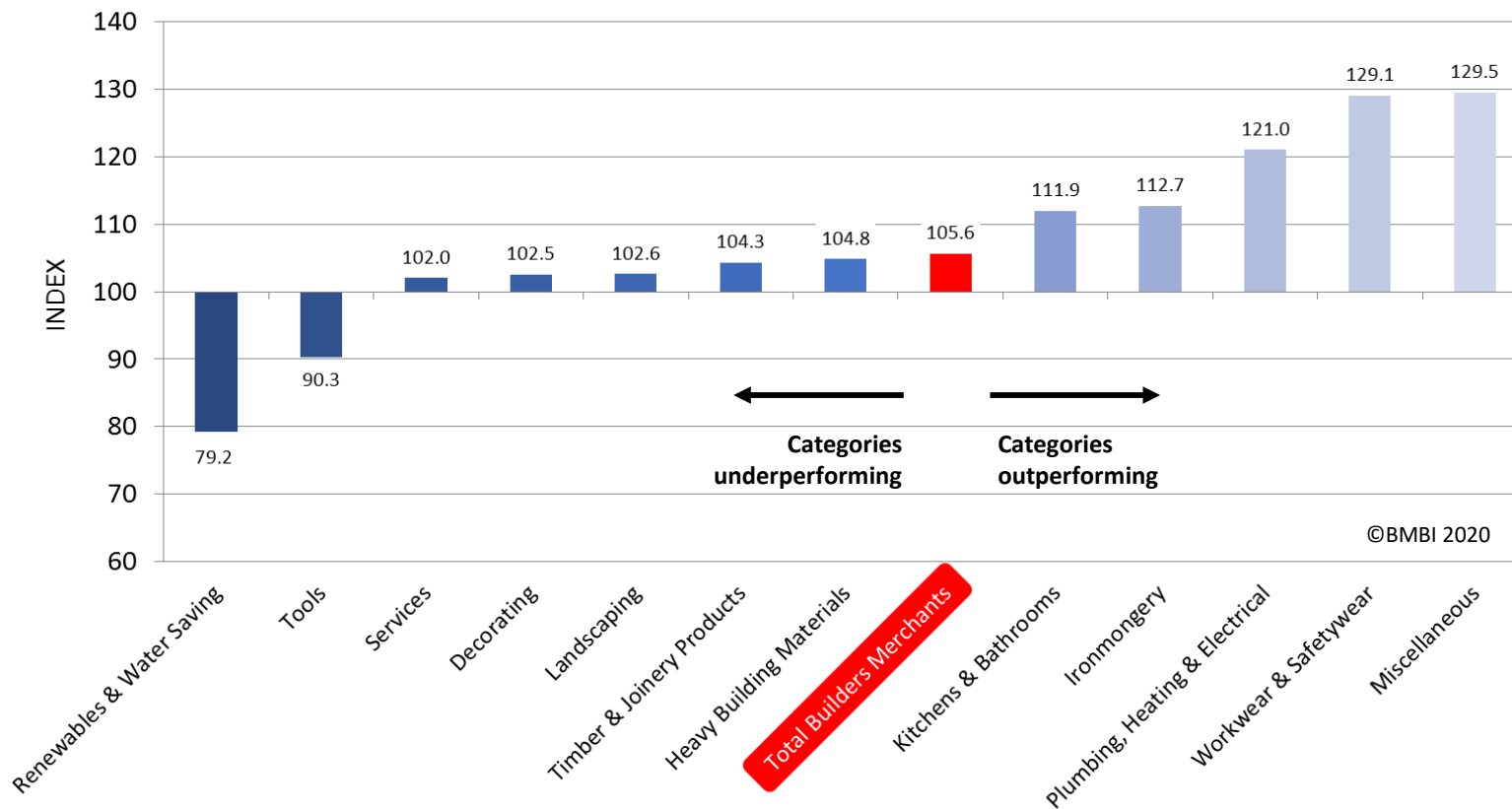
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Index and Categories

Q1 2020 index



Quarter 1 2020



©BMBI 2020

Indexed on July 2014 to June 2015

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

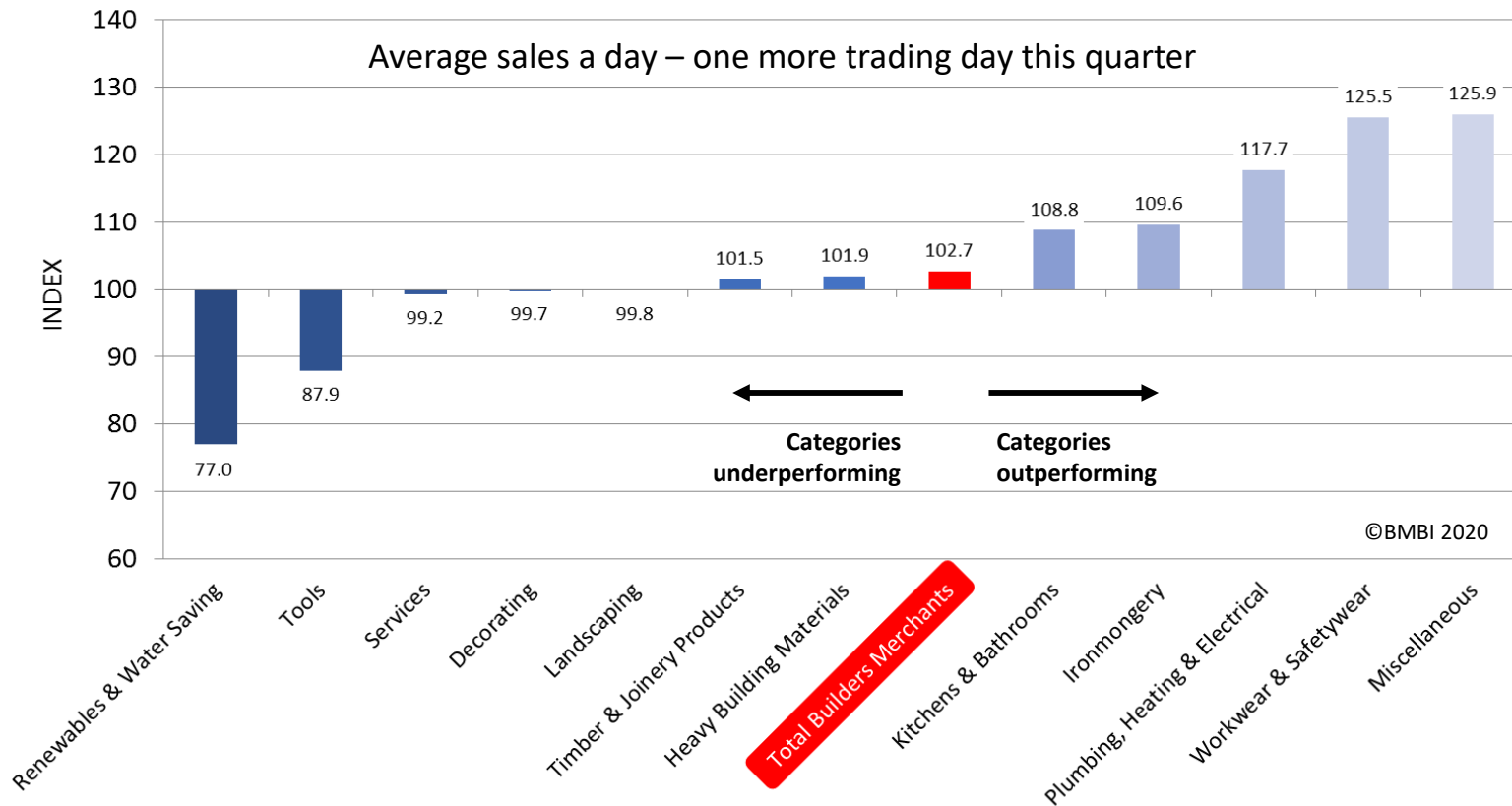
Quarterly: Index and Categories

Q1 2020 average sales a day index



Quarter 1 2020

Average sales a day – one more trading day this quarter



©BMBI 2020

Indexed on July 2014 to June 2015

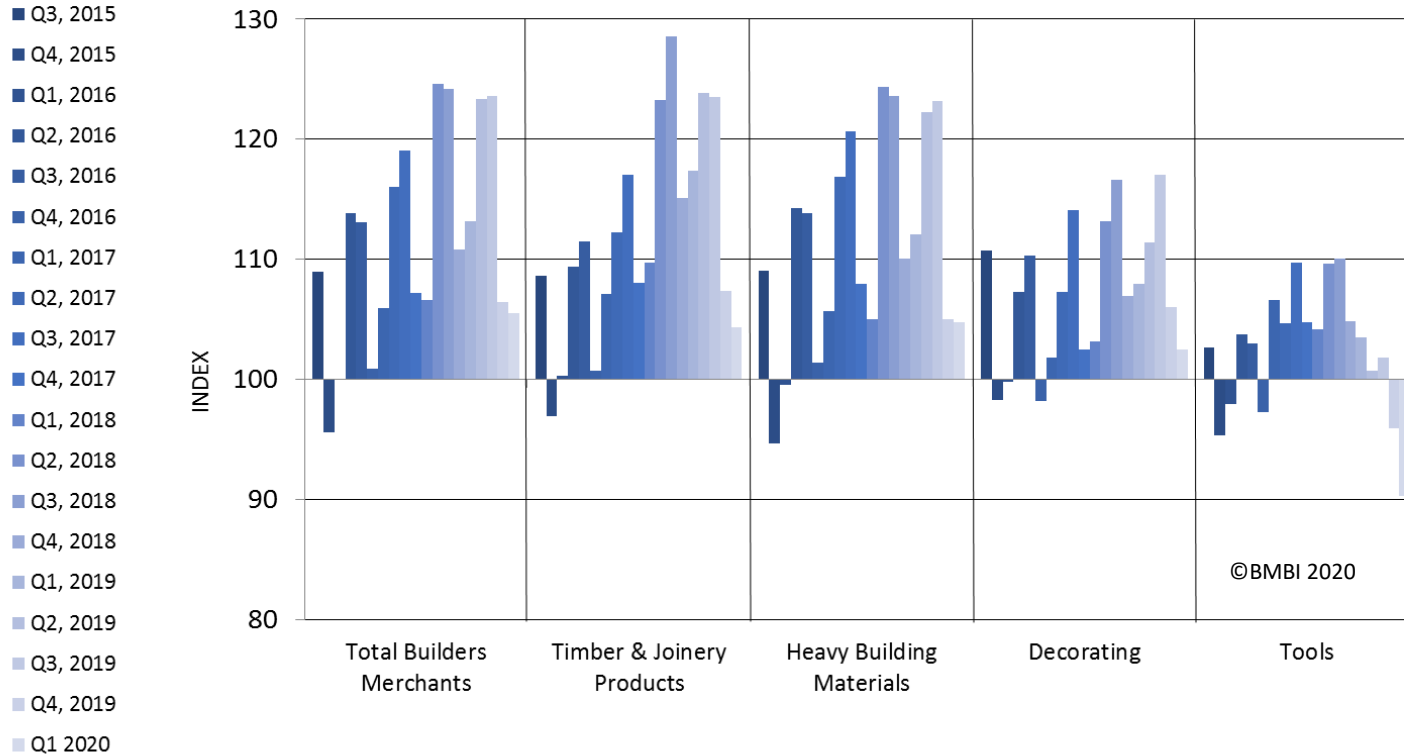
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2020



Indexed on July 2014 to June 2015

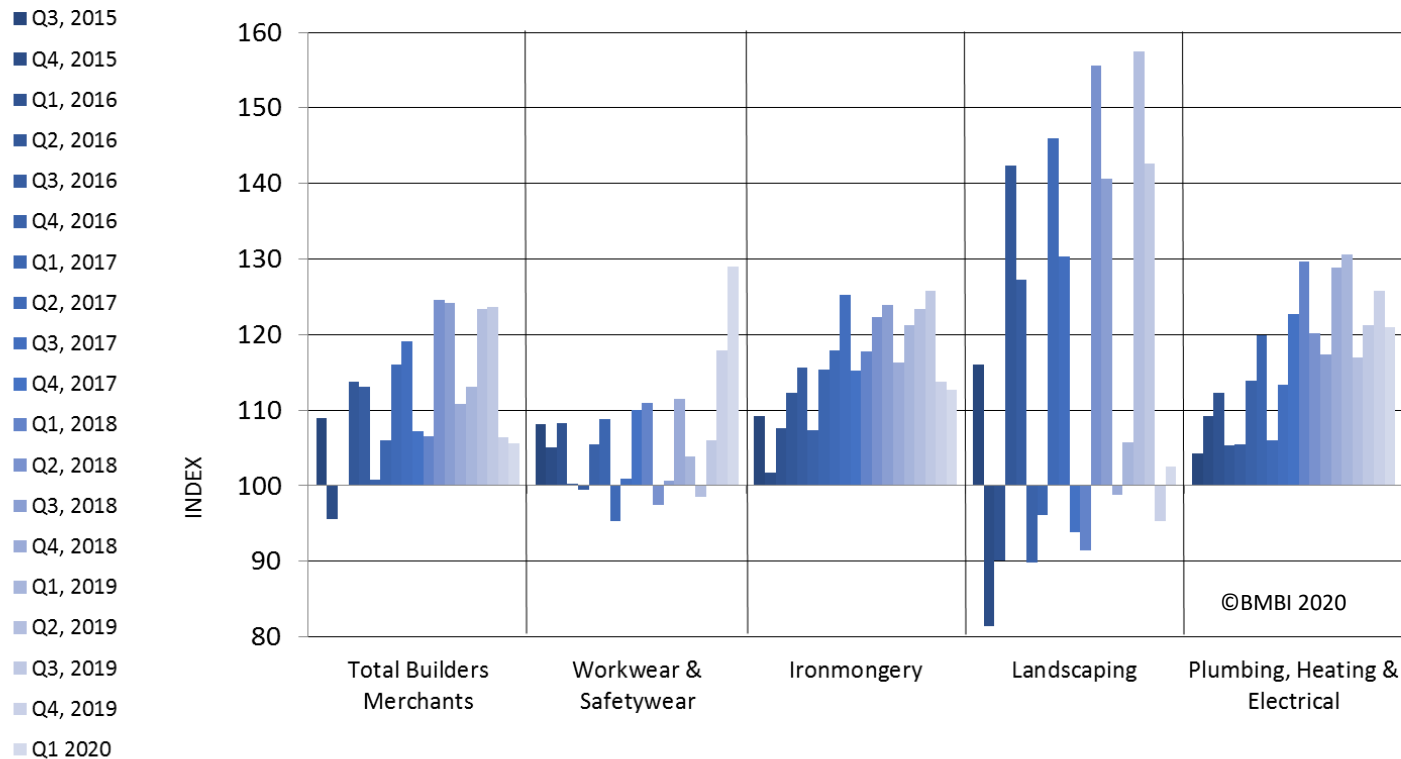
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2020



Indexed on July 2014 to June 2015

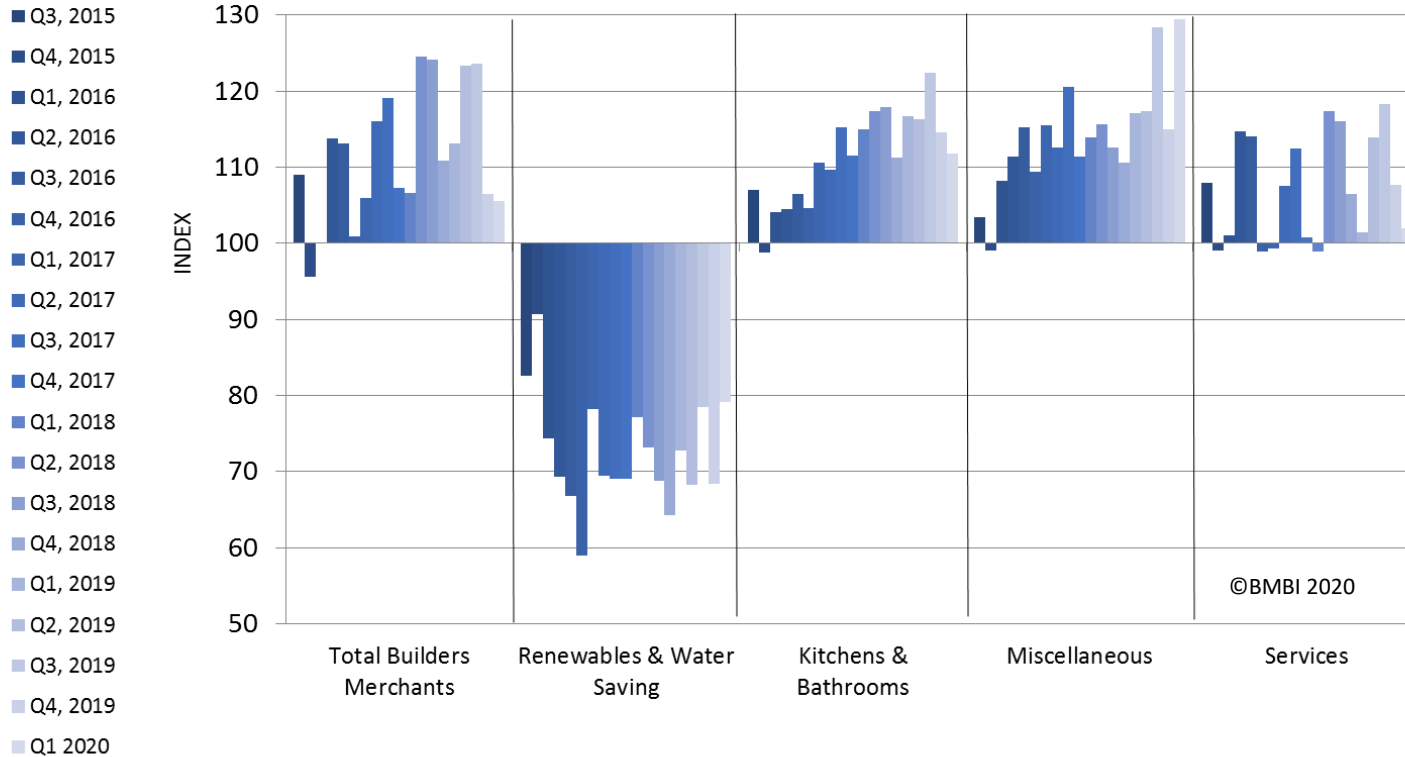
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2020



Indexed on July 2014 to June 2015

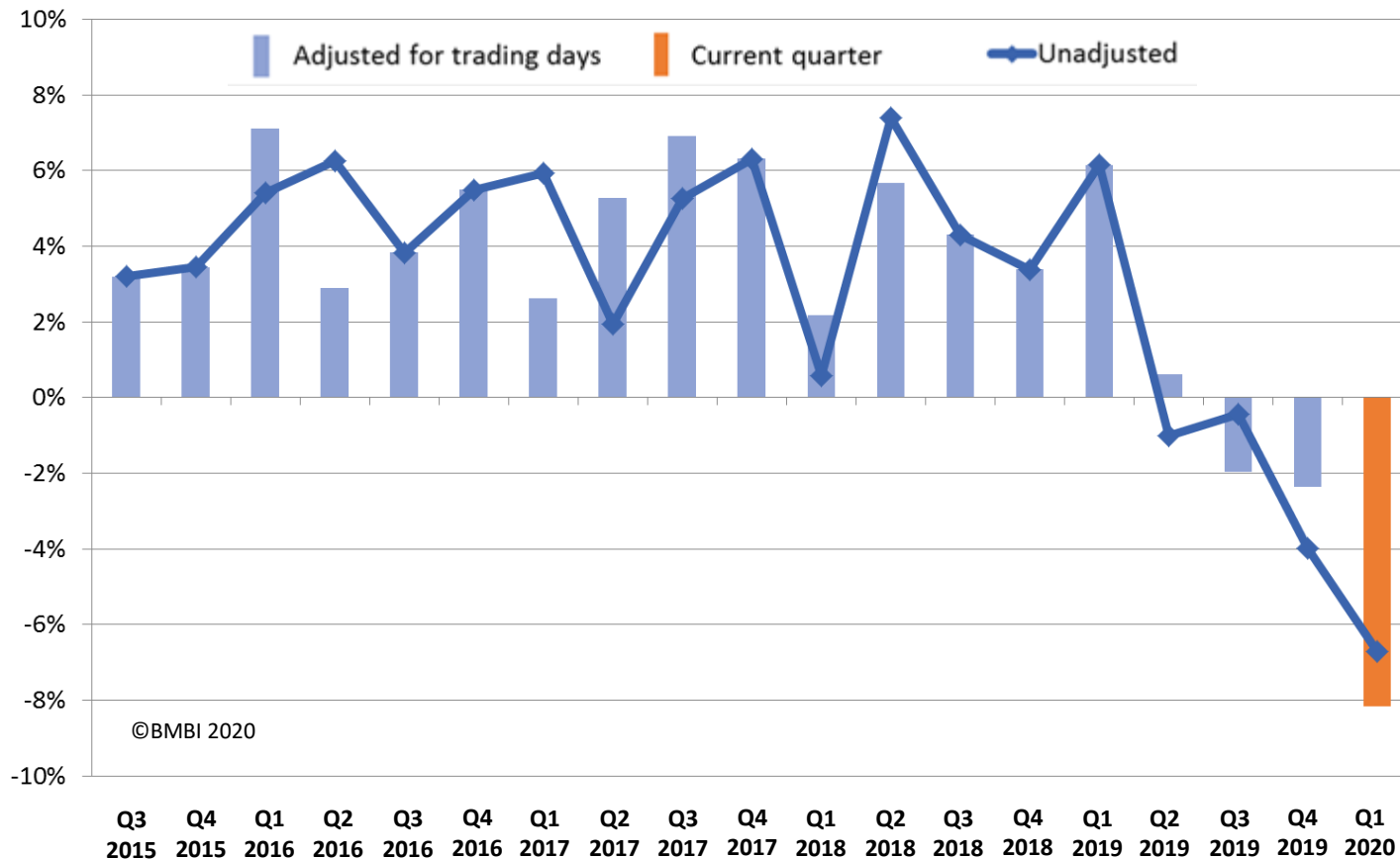
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Sales Indices

Adjusted and unadjusted for trading days



Quarterly Indices: Year on Year



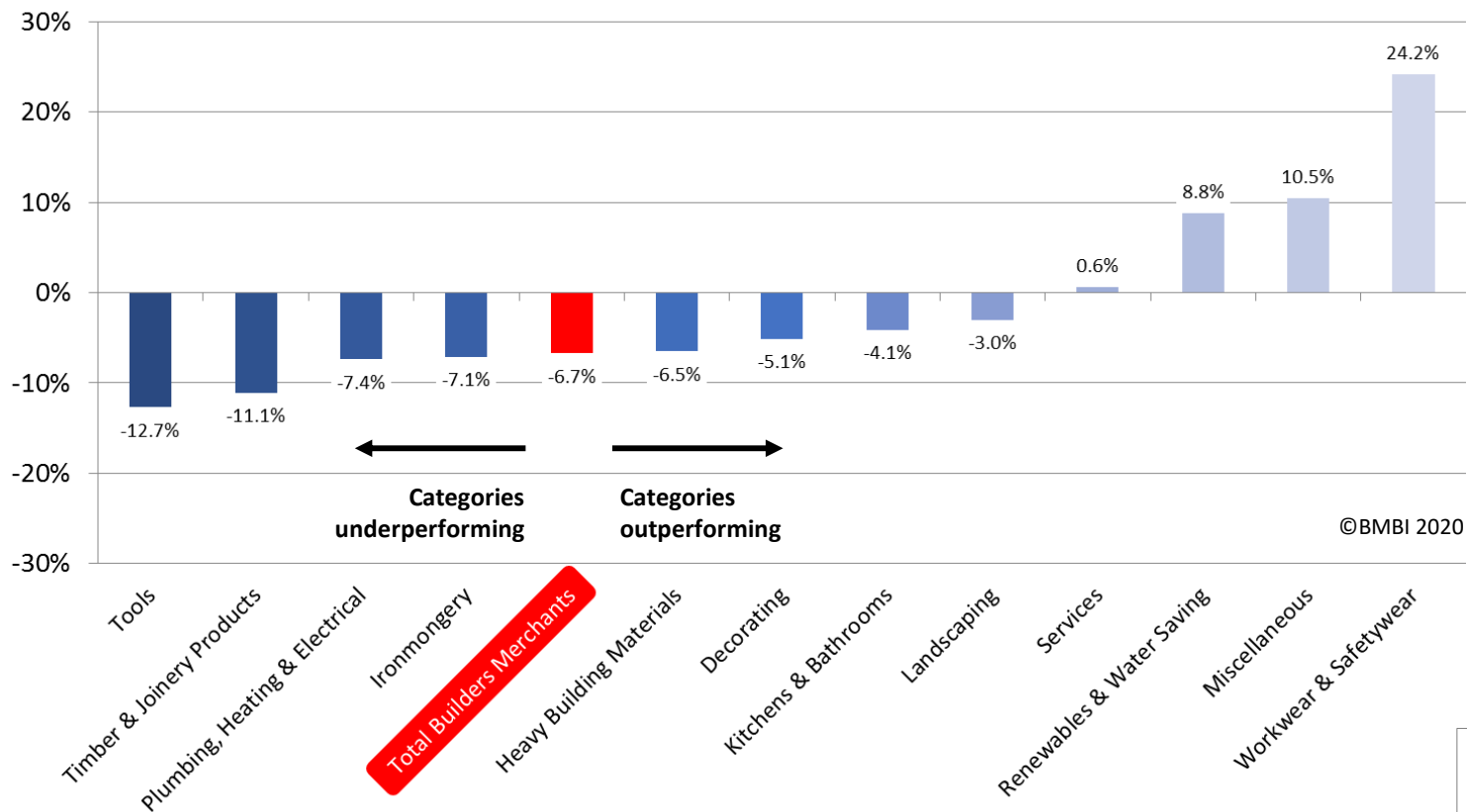
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: This Year v Last Year

Q1 2020 sales indices



Quarter 1 2020 index v Quarter 1 2019 index



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

Quarterly: This Year v Last Year

Q1 2020 average sales a day indices



Quarter 1 2020 index v Quarter 1 2019 index



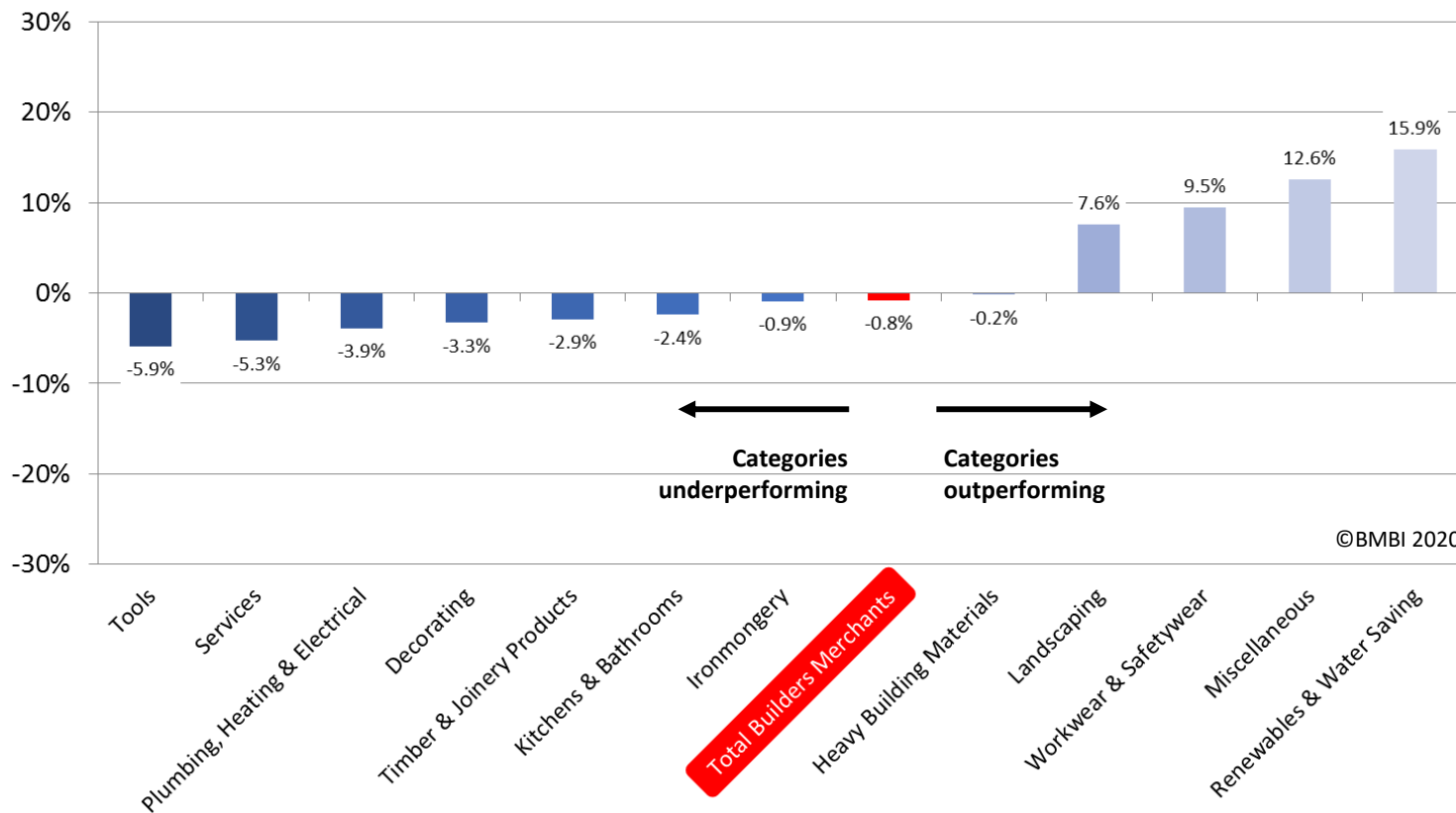
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Quarter on Quarter

Q1 2020 sales indices



Quarter 1 2020 index v Quarter 4 2019 index



©BMBI 2020

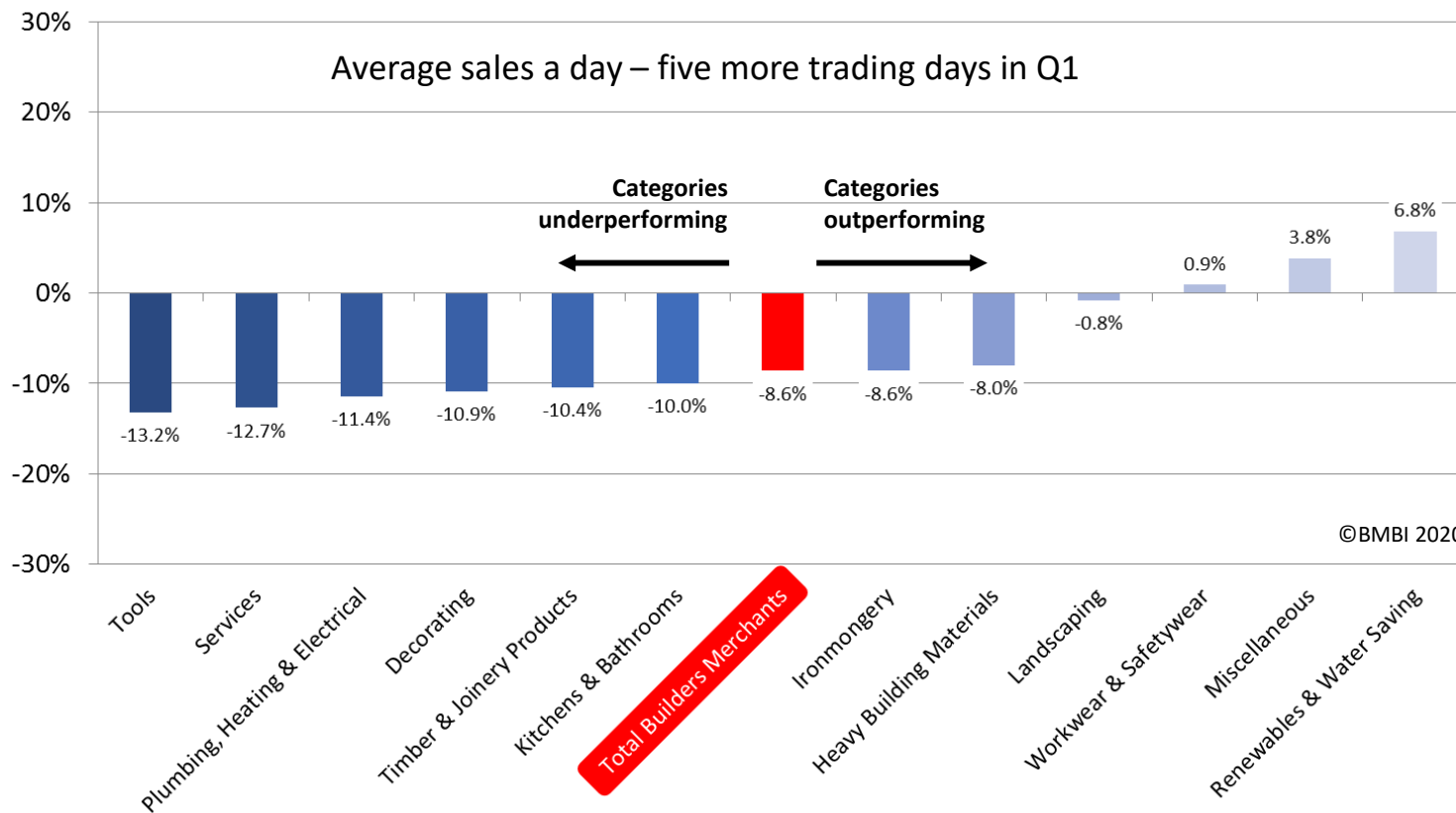
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Quarter on Quarter

Q1 2020 average sales a day indices



Quarter 1 2020 index v Quarter 4 2019 index

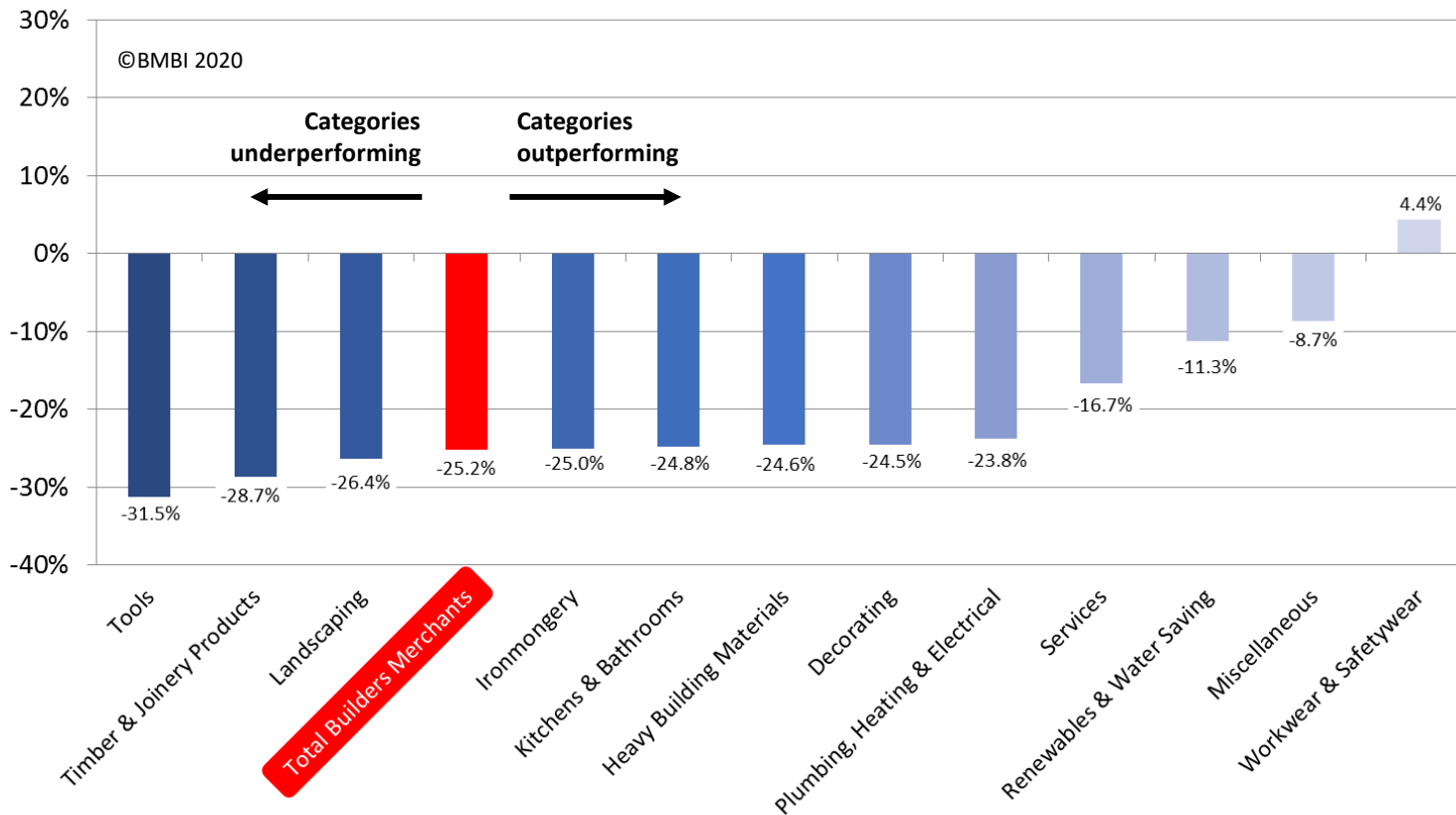


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Year to date: Year on Year

Last 4 months sales indices

Year to date: Jan 20 to Apr 20 index v Jan 19 to Apr 19 index



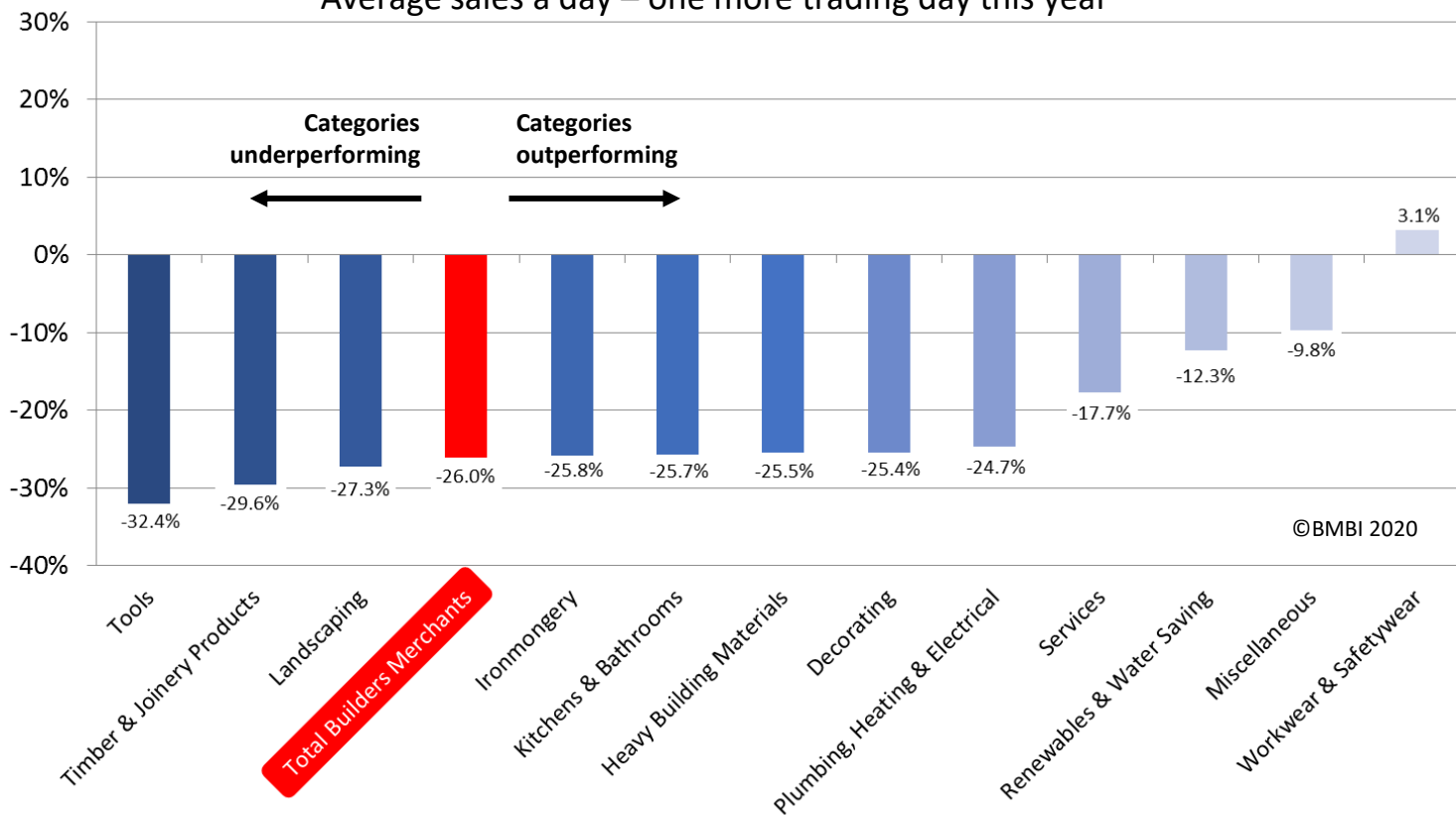
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Year to date: Year on Year

Last 4 months average sales a day indices

Year to date: Jan 20 to Apr 20 index v Jan 19 to Apr 19 index

Average sales a day – one more trading day this year*



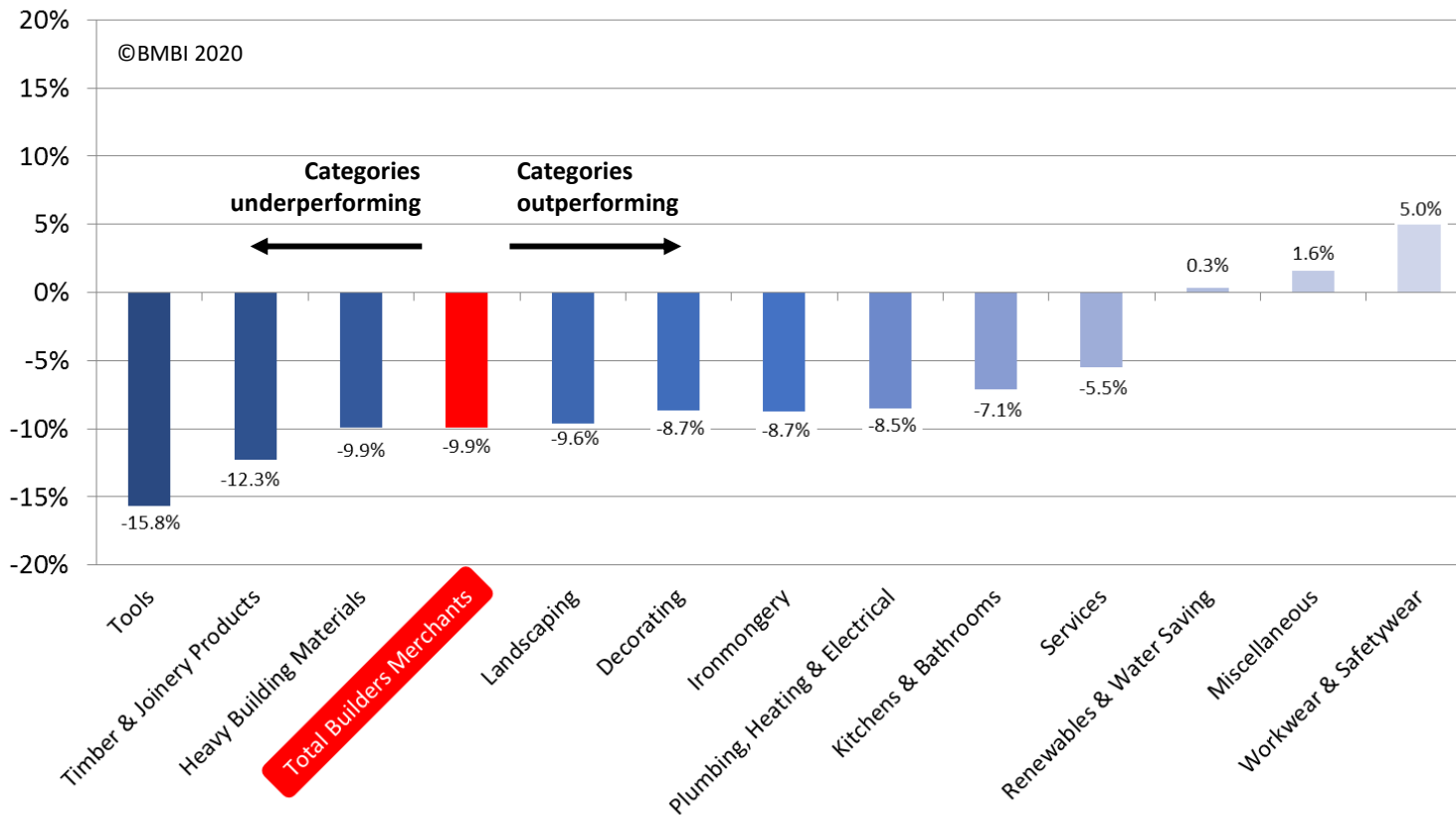
Source: GfK's Builders Merchants Total Category Report July 2015 to April 2020

*Some merchants temporarily closed branches in April 2020 and this will have affected trading day comparisons.

Last 12 Months: Year on Year

Rolling 12 months sales indices

12 months May 19 to Apr 20 v 12 months May 18 to Apr 19



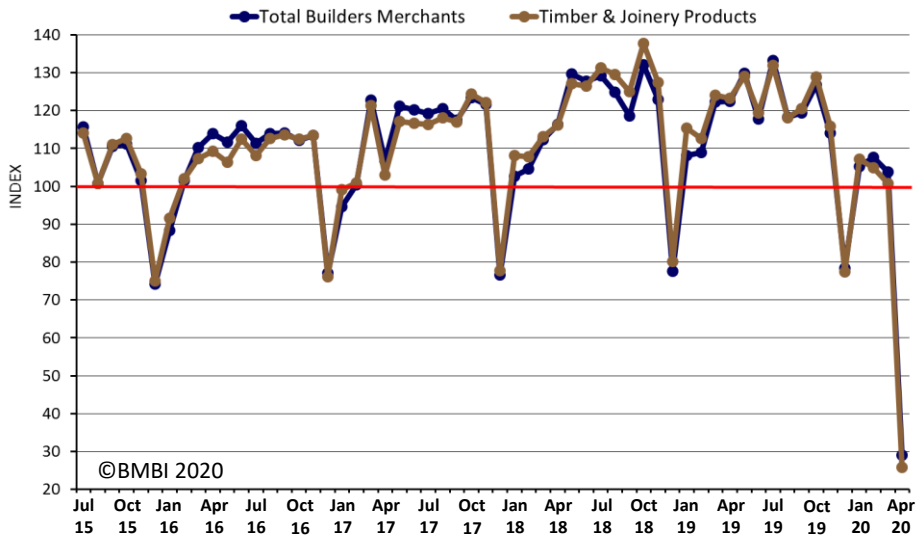
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Monthly: Indices

April 2020

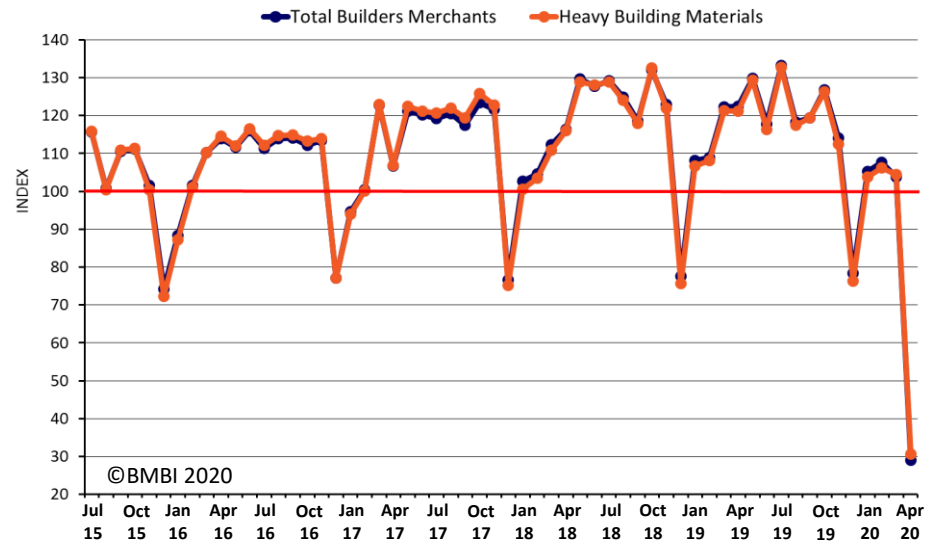


Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



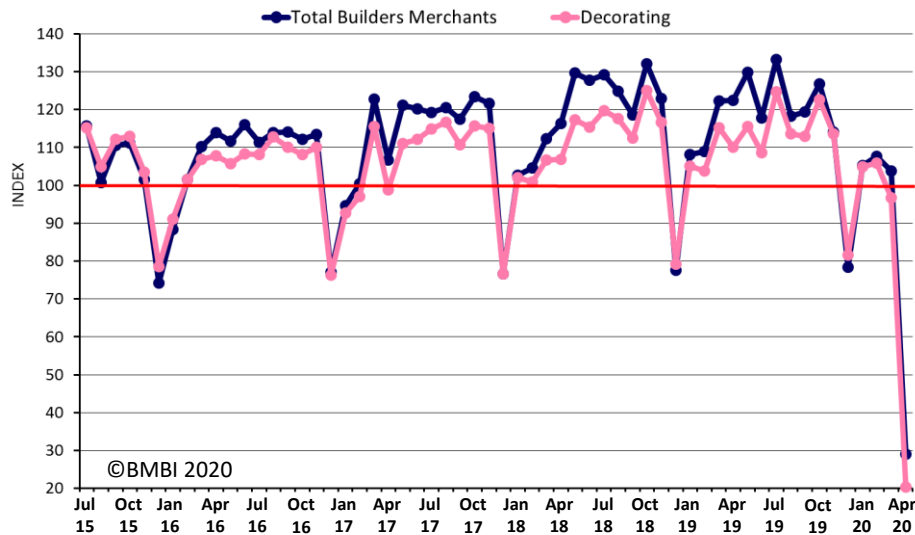
Indexed on July 2014 – June 2015

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

Monthly: Indices

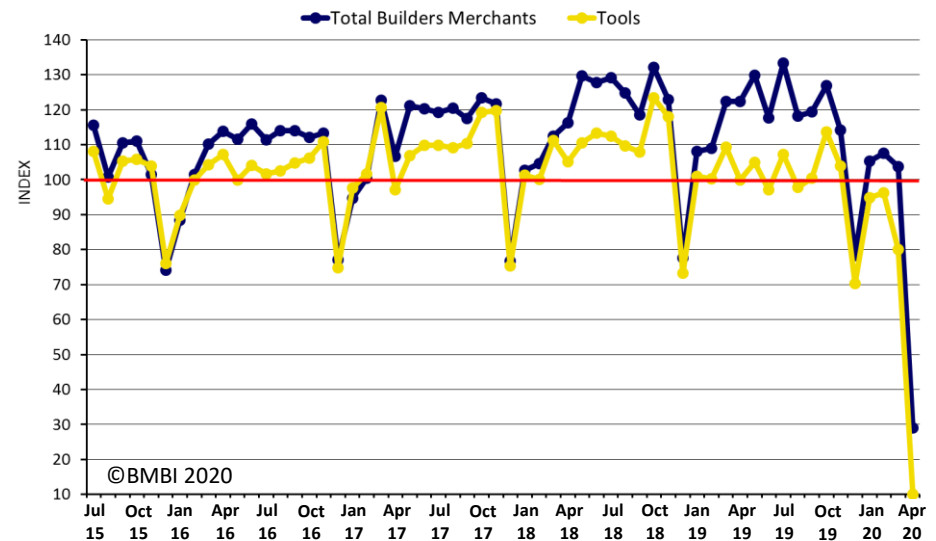
April 2020

Decorating



Indexed on July 2014 – June 2015

Tools



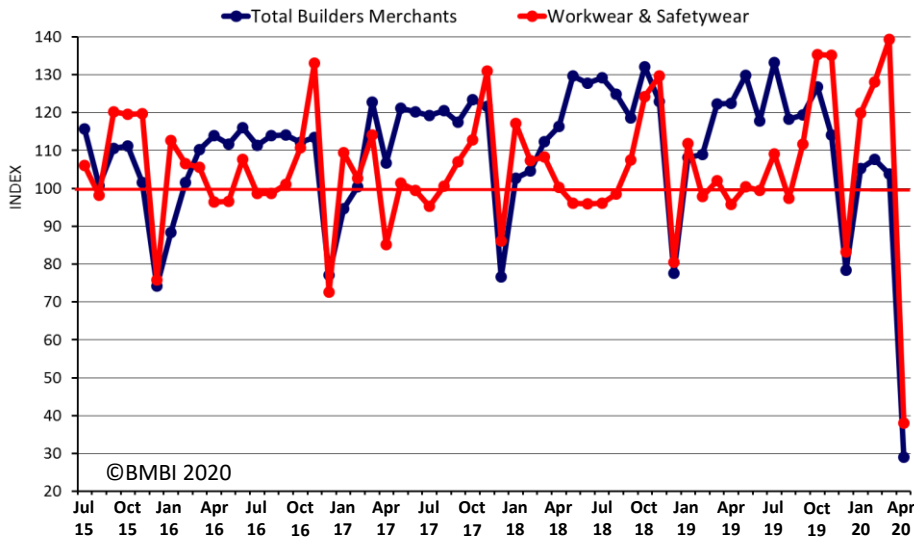
Indexed on July 2014 – June 2015

Monthly: Indices

April 2020

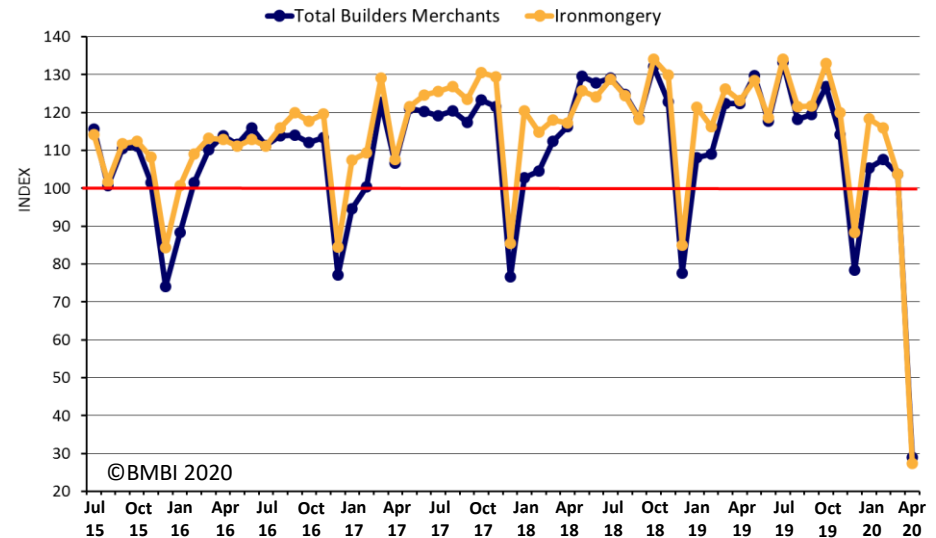


Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery



Indexed on July 2014 – June 2015

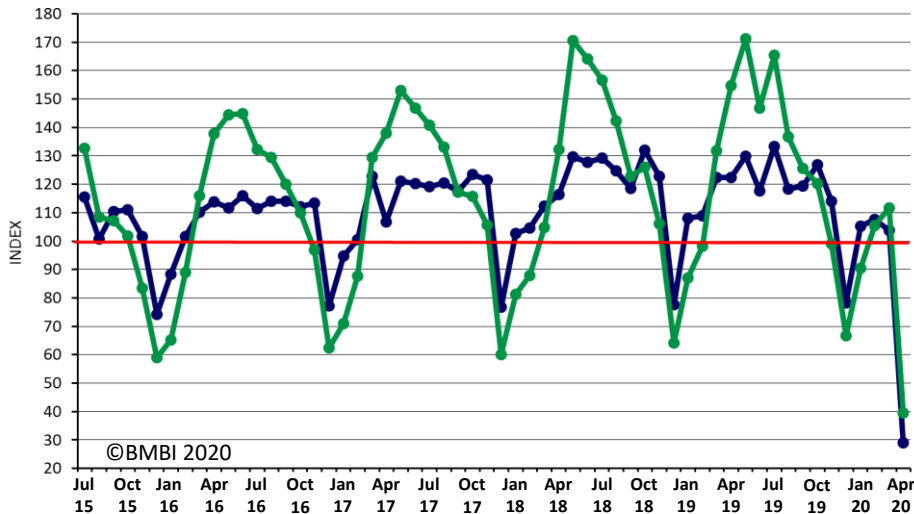
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

Monthly: Indices

April 2020

Landscaping

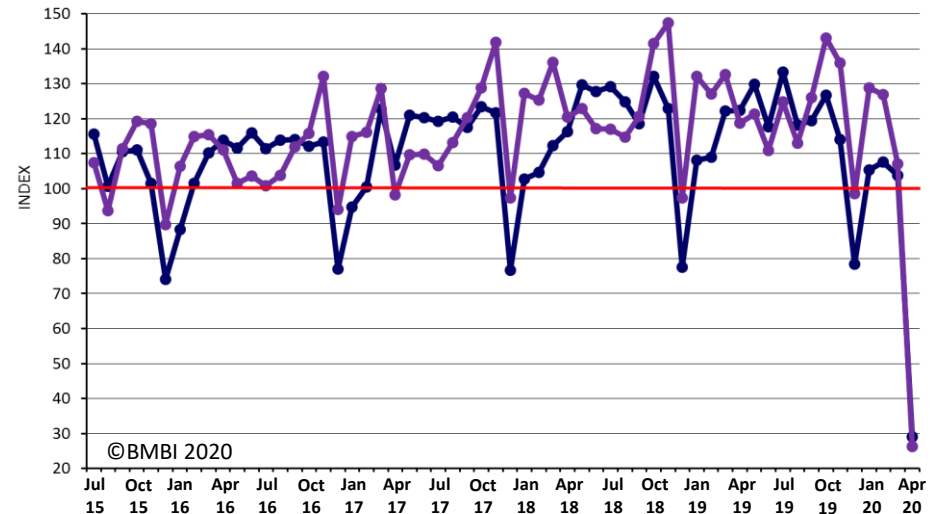
● Total Builders Merchants ● Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical

● Total Builders Merchants ● Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

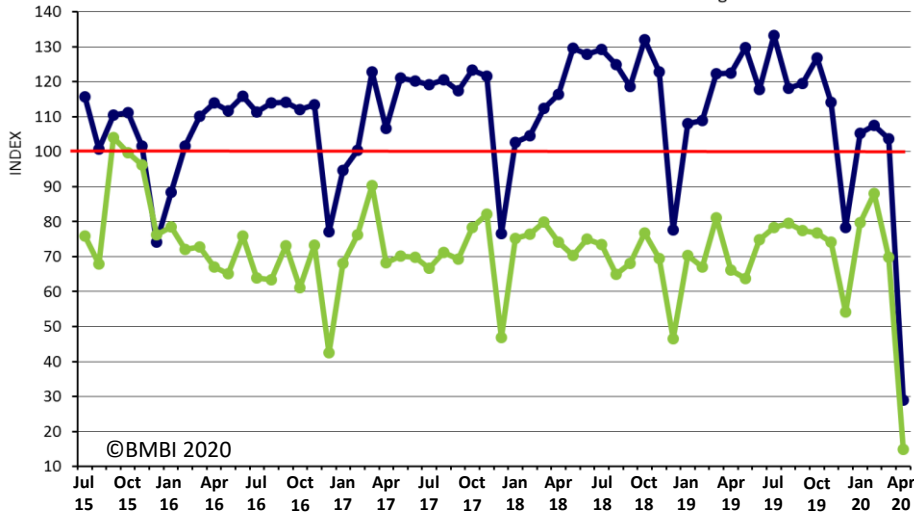
Monthly: Indices

April 2020



Renewables & Water Saving

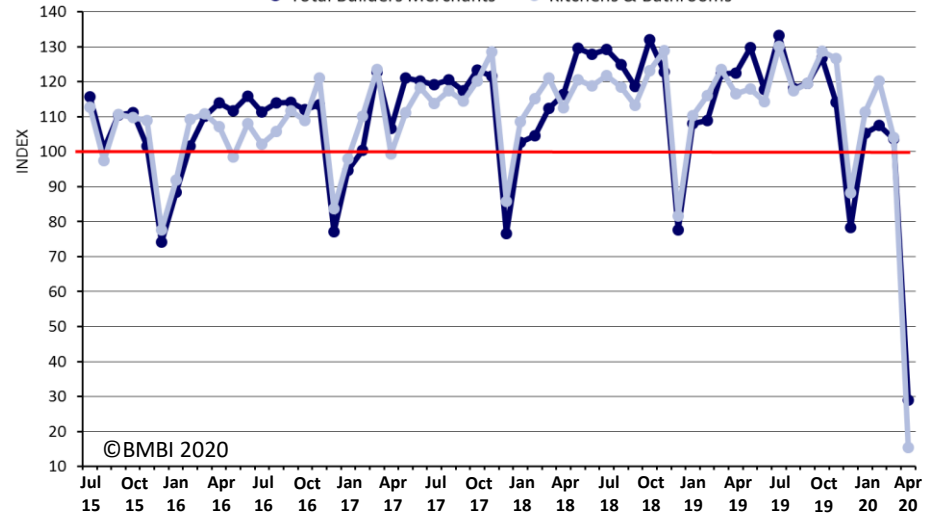
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms

● Total Builders Merchants ● Kitchens & Bathrooms



Indexed on July 2014 – June 2015

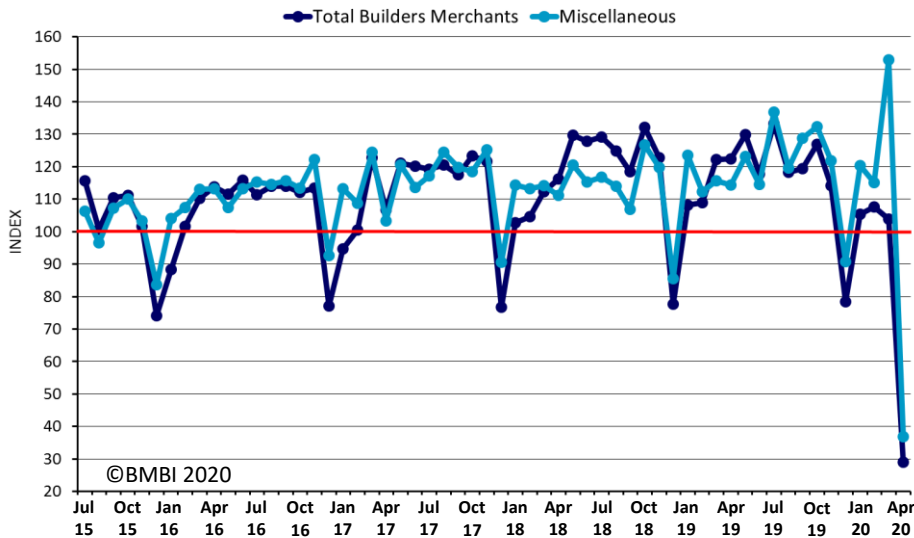
GfK Source: GfK's Builders Merchants Total Category Report July 2015 to April 2020

Monthly: Indices

April 2020

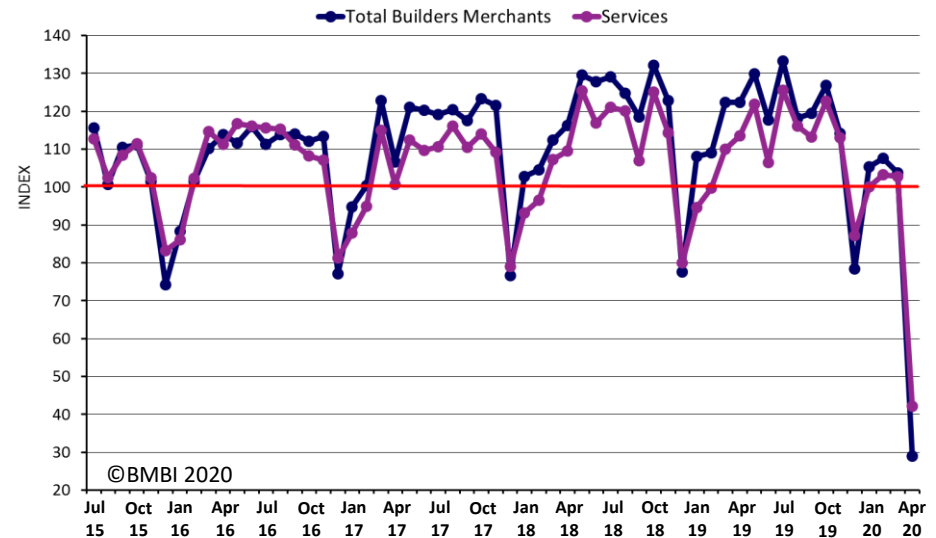


Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

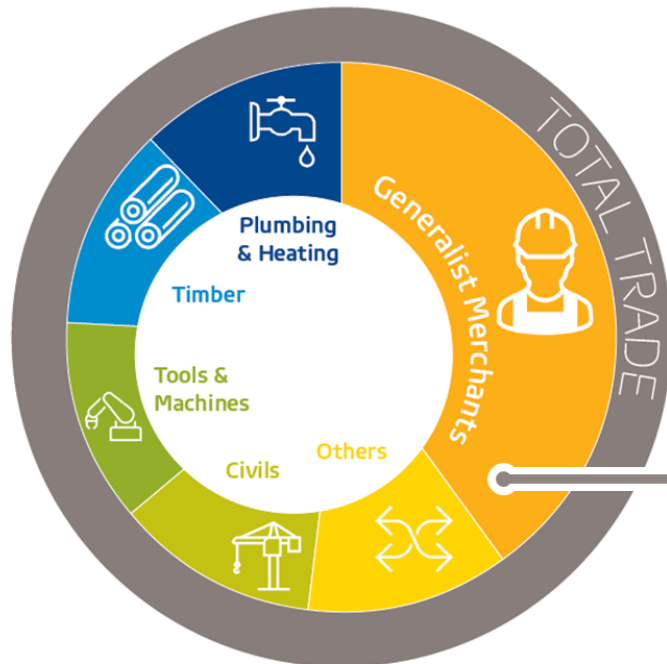
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2020

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

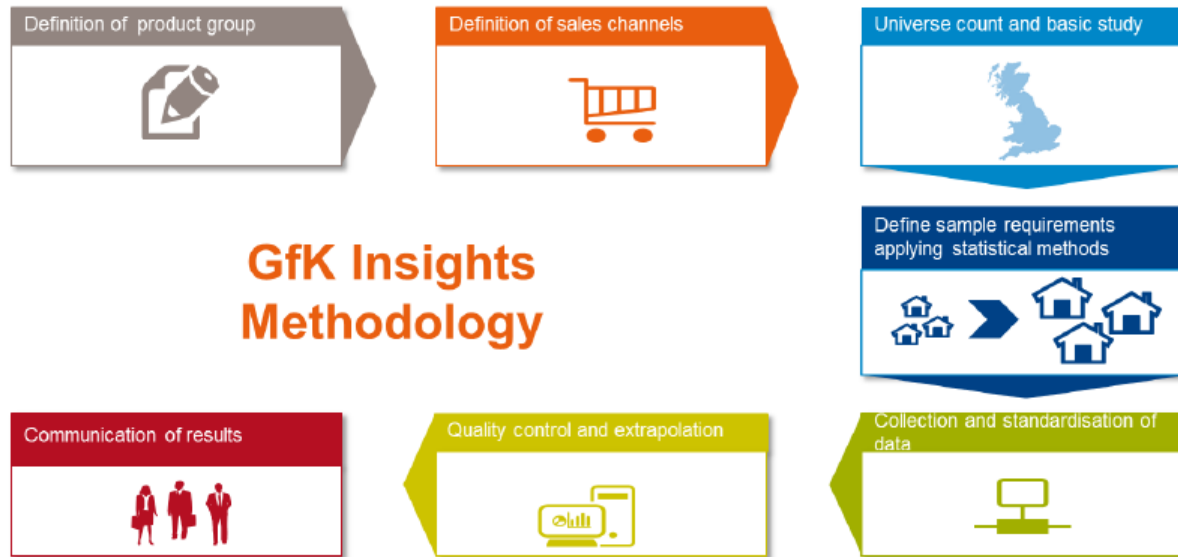
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

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

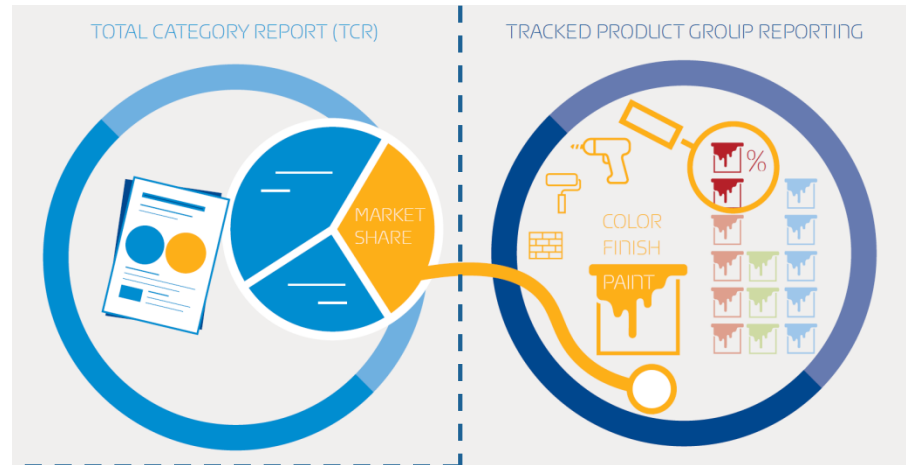
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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 Emile van der Ryst at GfK
emile.van-der-ryst@gfk.com

Available categories:

Heavyside

Bricks
Insulation

Lightside

Emulsion Paints (incl. Masonry & Base)
Trim Paints
Primers/Undercoats
Woodcare
Adhesives
Sealants
Fillers/PU Foam
Tile Fixing (Adhesives/Grout)

Contact us

For further information



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