

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for May 2020

Building the Industry & Building Brands from Knowledge



Contents - 1

Click links below to visit pages

Click links to visit pages:	Page
Introduction	5
Trading day differences explained	6
GfK's Merchant Panel update	7
Overview	8
BMBI Expert Panel	9-10
Monthly data:	
Monthly index chart, unadjusted and adjusted for trading day differences	11
Monthly BMBI indices, by category	12
May index chart, by category	13
Monthly year-on-year chart, unadjusted and adjusted for trading day differences	14
May year-on-year sales index chart, by category	15
May year-on-year average sales a day index chart, by category	16
May v April sales index chart, by category	17
May v April average sales a day index chart, by category	18
Quarterly data:	
Quarterly BMBI indices, by category	19
Quarter 1 index chart, unadjusted and adjusted for trading day differences	20
Quarter 1 index chart, by category	21
Quarter 1 average sales a day index chart, by category	22
Quarterly indices, by category	23-25
Quarter 1 year-on-year chart, unadjusted and adjusted for trading days	26
Quarter 1 year-on-year sales index chart, by category	27
Quarter 1 year-on-year average sales a day index chart, by category	28
Quarter 1 v Quarter 4 sales index chart, by category	29
Quarter 1 v Quarter 4 average sales a day index chart, by category	30

Click links on these links 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
Other periods:	
Year to date index chart, by category	31
Year to date average sales a day index chart, by category	32
Rolling 12 months compared with previous 12 months chart, by category	33
Rolling 12 months average sales a day compared with previous 12 months chart, by category	34
Monthly Category Charts:	
Timber & Joinery Products	35
Heavy Building Materials	35
Decorating	36
Tools	36
Workwear & Safetywear	37
Ironmongery	37
Landscaping	38
Plumbing Heating & Electrical	38
Renewables & Water Saving	39
Kitchens & Bathrooms	39
Miscellaneous	40
Services	40
Trading days	41
Methodology	42 – 44
Contacts	45

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 features several report covers:

- Monthly and Quarterly Indices:** March 2020 and Q1 2020. Includes charts for Plumbing, Heating & Electrical.
- GfK's Product Categories:** Cover category headline values & in-depth, level insights. Includes pie charts and data tables.
- Macro factors impacting Merchants:** A report cover with a GfK logo.
- Property transactions:** Monthly transactions, residential, seasonally adjusted. Includes a bar chart showing annual totals from 2010 to 2019.
- Expert Panel:** Shower Enclosures & Showering. Features a photo of Mike Tattam, Sales & Marketing Director at LAKES.
- In-depth product group reporting:** A report cover with a GfK logo and various charts.

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 contact 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.

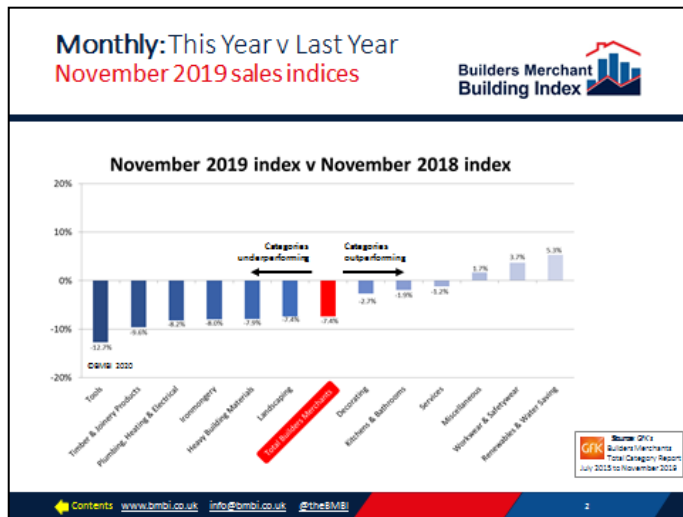
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in 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.

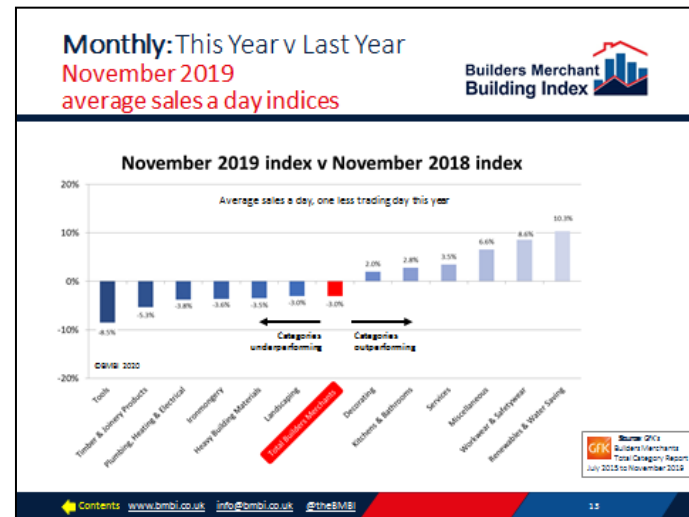
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

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.

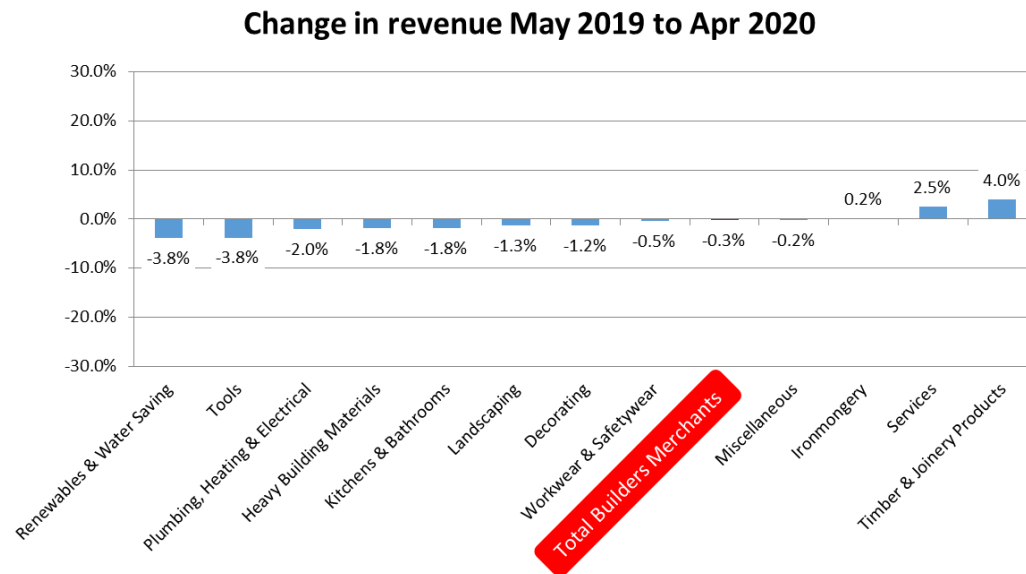
The charts provide two valid views of the same data. Direct comparisons (on the left) show what happened in absolute numbers – average sales a day (on the right) enables trading day differences to be set aside.

GfK's Builders Merchant Panel update



After almost six years without change, GfK's Builders Merchant Panel, which powers the Builders Merchant Building Index, has seen three merchants leave and three join. While this month's report is the first to incorporate the new data, there has been a lengthy transition period taking place in the background. As a result, data covering January 2019 onwards now reflects the new panel. This ensures the robust nature of the Builders Merchant Building Index has been maintained.

The overall impact of the changes has been very small, with total revenue for the 12 months May 2019 to April 2020 being just -0.3% different to that previously published. Individual categories have mostly small changes, some a little up and some a little down, depending on the mix of sales contributed by the joining and leaving merchants. Small category Renewables & Water Saving is more significant, and only Timber & Joinery Products and Tools among the main categories are appreciably different, as illustrated in this chart.



The tables and charts in this report use the refreshed data from January 2019 onwards. For example, the values between May 2019 and April 2020 in the Indices table on page 12 are marginally different to those in the April report (eg. March 2020 Index: 103.8 in April report, 103.1 in May report). The chart on page 11 incorporates the new values from January 2019 onwards but the differences are relatively small.

Incorporating the new data back to January 2019 has also meant that year-on-year, month-on-month and year-to-date comparisons are all calculated using the refreshed data throughout, to ensure accurate reporting – a hallmark of the Builders Merchant Building Index.

If you have questions on the changes email Tom@mra-marketing.com or Emile.van-der-Ryst@gfk.com

Overview

Builders' Merchant sales bounce back sharply in May

After April's unprecedented sales collapse due to the Covid-19 lockdown, trades began to return to work in May, encouraging merchants to start re-opening branches – with most still offering a restricted service. This BMBI report documents the start of what appears to be a strong bounce back.

Year-on-Year

Total Builders Merchants value sales in May were down 39.9% compared with May 2019 (a significant improvement on April, which was -76.3% less than April 2019). All categories sold less, with Tools (-66.1%) and Kitchens & Bathrooms (-62.7%) hit hardest. Workwear & Safetywear (-33.4%) was affected less and Landscaping finished just 12.5% below last May. With May having two less trading days this year, overall average sales a day for the month were 33.6% lower than May 2019.

Month-on-Month

With April sales at unprecedented levels, May's partial recovery resulted in some highly unusual month-on-month growth figures. Total merchant value sales in May were 171.3% above April 2020, with one less trading day this month. Five categories did better, lead by Tools (+308%), despite it being the weakest category year-on-year. To put this percentage growth into context, Tools revenue in May was four times that of April. Landscaping sold 278.9% more than in April and Kitchens & Bathrooms was up 210.7%. Largest category Heavy Building Materials (+157.6%) grew more slowly. Average sales a day in May across all merchants were 185.6% higher than in April.

Other periods

Year to date sales in the first five months of 2020 were 29.2% down on January to May 2019, with one less trading day this year. Workwear & Safetywear (-2.7%) did best, boosted by strong demand for protective equipment. The three weakest categories were Tools (-40.4%), Kitchens & Bathrooms (-33.2%) and Timber & Joinery Products (-31.3%).

The 12 months June 2019 to May 2020 were down 14.1% on the same period a year earlier. Eight categories did better, led by Workwear & Safetywear (+1.7%), the only category that sold more. Tools (-23.3%) did least well.

Index

May's BMBI index was 78.7 and with the exception of seasonal category Landscaping (152.5), all categories were well down.

Total Builders Merchants value sales in May were down 39.9% compared with May 2019 (an improved position since April, which was -76.3% on April 2019).

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](#)

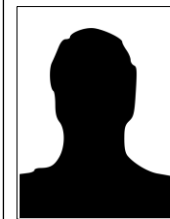
Expert for Shower Enclosures and Showering:



Mike Tattam
Sales & Marketing Director
Lakes

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

Interested in joining our panel of Experts?:



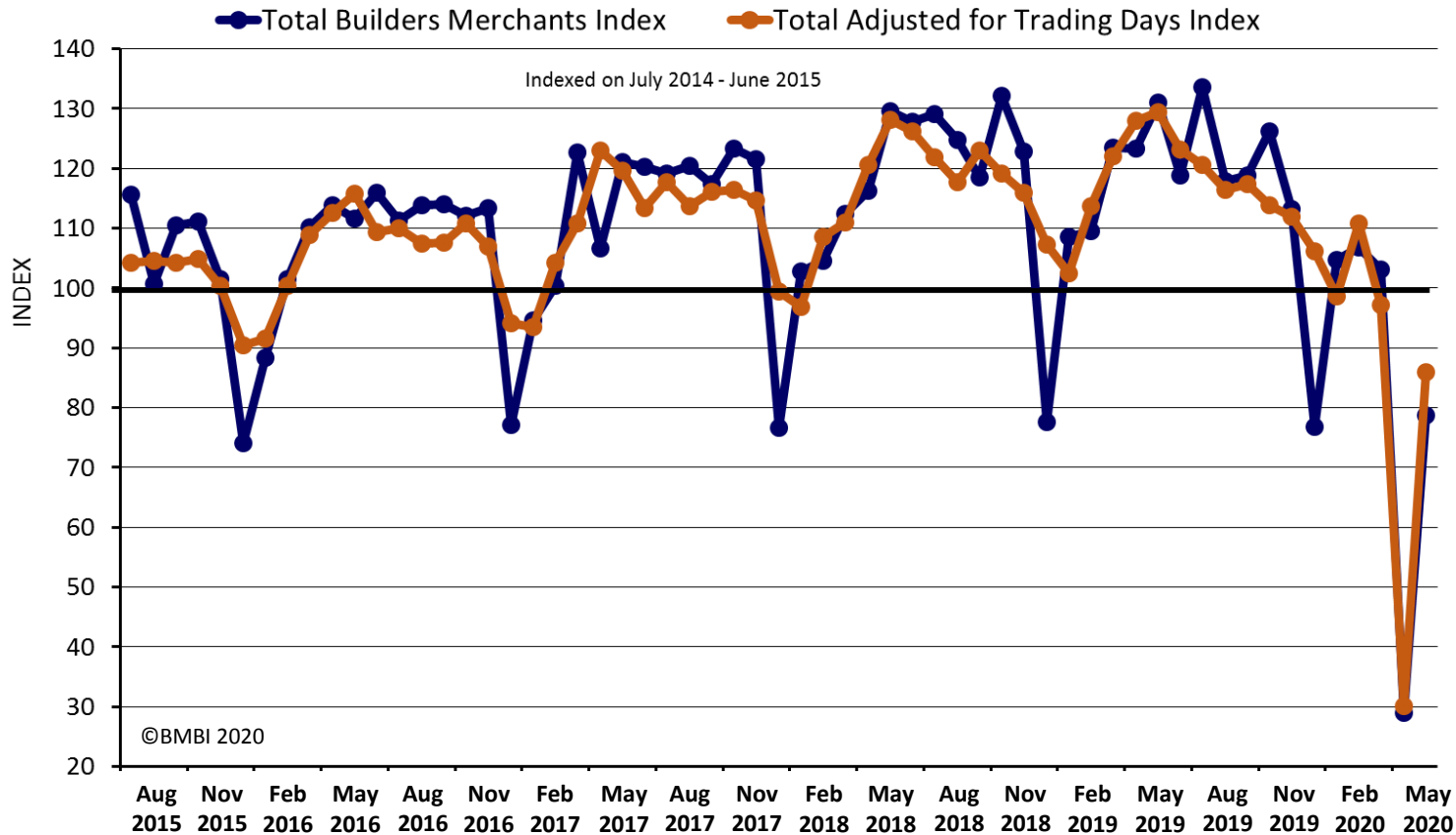
If you have a finger on the pulse of your industry sector and would like to join the Expert panel, please contact Tom Rigby at MRA Marketing:

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 May 2020

Monthly: Index and Categories

May 2019* – May 2020

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



		2019								2020				
MONTHLY SALES VALUE INDEX	Index	May	Jun	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Total Builders Merchants	100	131.0	118.8	133.6	117.8	118.8	126.2	113.3	76.8	104.7	106.9	103.1	29.0	78.7
Timber & Joinery Products	100	135.3	124.9	138.2	123.1	125.4	134.4	120.4	79.1	111.5	109.0	105.0	26.9	80.5
Heavy Building Materials	100	128.8	116.1	130.9	115.3	116.9	123.5	109.9	73.5	101.7	103.8	102.0	30.5	78.5
Decorating	100	114.4	107.5	123.4	112.2	111.5	121.5	112.5	80.0	103.6	104.5	95.2	19.8	54.8
Tools	100	103.3	95.3	104.4	95.0	96.0	108.9	100.8	67.0	91.8	91.9	74.2	8.6	35.1
Workwear & Safetywear	100	100.0	99.1	108.6	96.7	110.7	135.0	134.8	82.4	119.4	127.7	139.1	37.7	66.6
Ironmongery	100	129.0	119.2	134.3	121.9	122.0	133.2	120.0	87.7	118.7	116.1	104.0	27.3	58.9
Landscaping	100	174.2	148.9	166.0	135.2	122.6	116.3	94.9	62.4	86.9	103.0	110.4	40.3	152.5
Plumbing, Heating & Electrical	100	119.4	108.9	122.4	110.4	123.4	140.7	133.7	95.9	126.3	124.8	104.3	25.4	51.8
Renewables & Water Saving	100	61.9	72.8	76.2	76.9	73.0	74.0	72.0	51.4	75.2	86.1	68.6	12.7	26.7
Kitchens & Bathrooms	100	117.3	112.6	128.6	115.0	116.9	127.6	125.4	85.4	109.1	117.5	101.7	14.1	43.7
Miscellaneous	100	123.0	114.9	136.8	118.7	128.5	131.8	122.0	90.8	119.9	114.7	152.6	36.7	55.1
Services	100	124.4	109.1	130.2	118.7	116.6	125.5	115.7	89.7	103.0	106.1	105.3	42.3	70.2

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

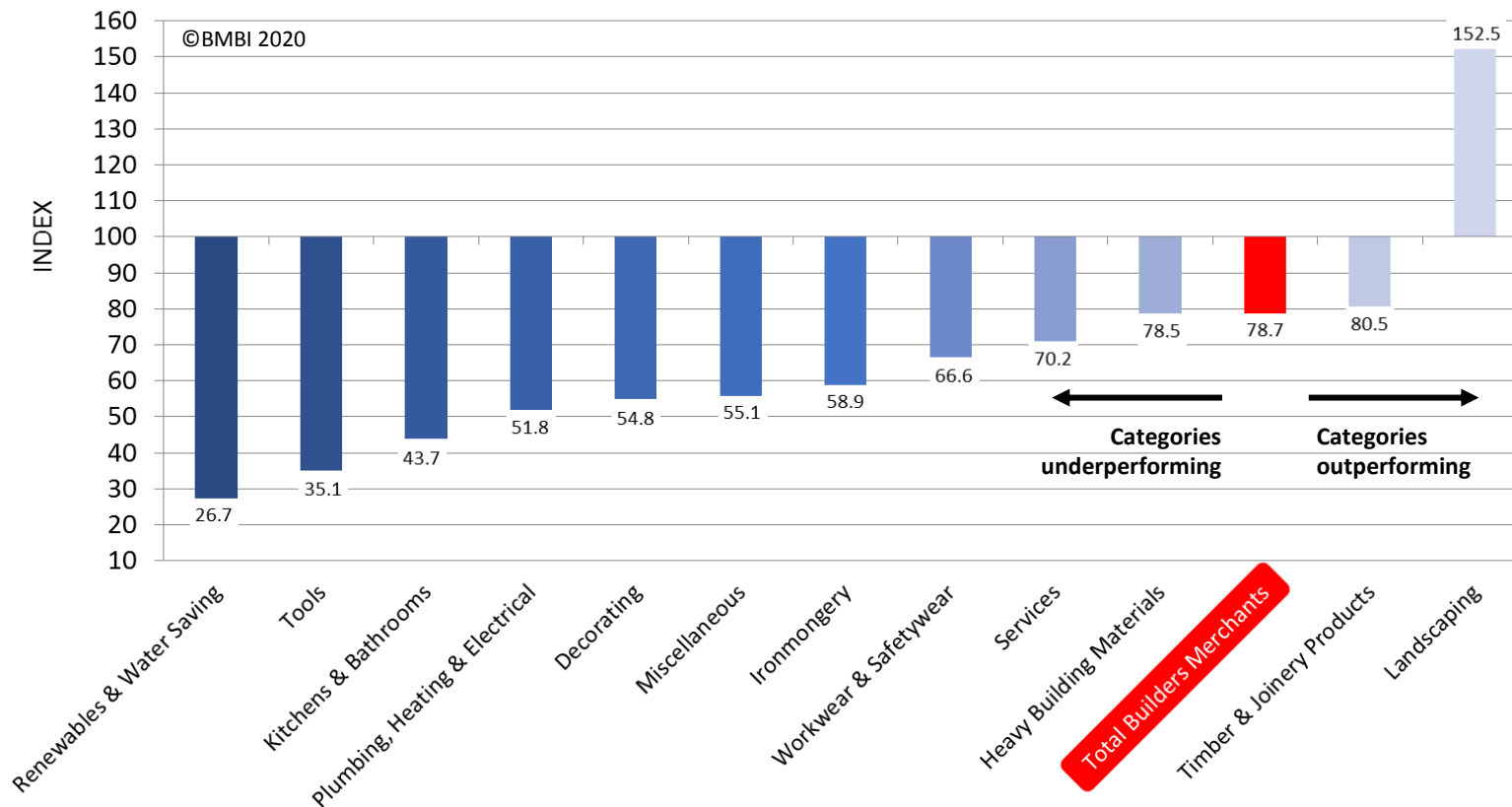
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2020


Monthly: Index and Categories

May 2020 index



May 2020 Index



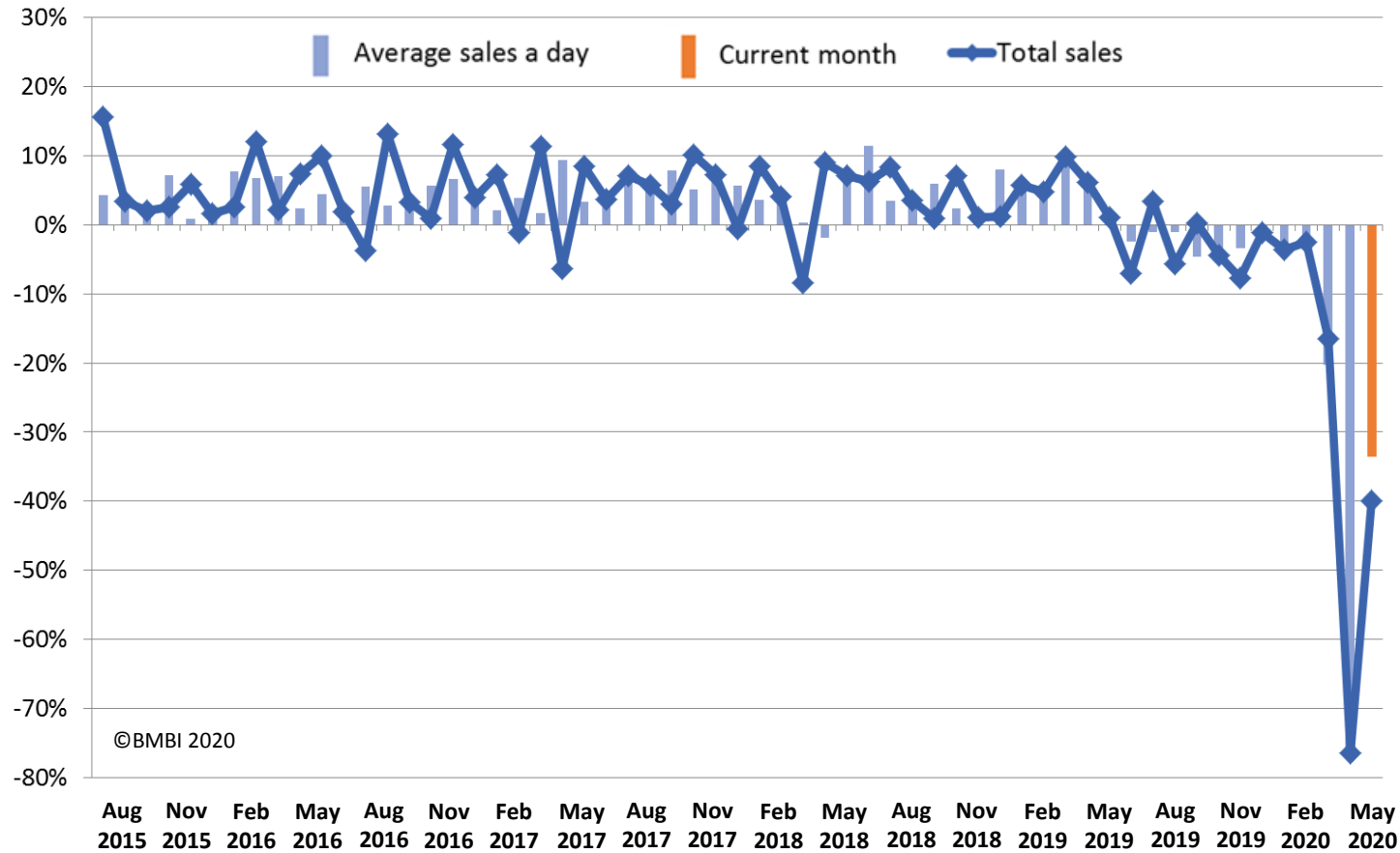
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2020

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



Monthly: Year on Year



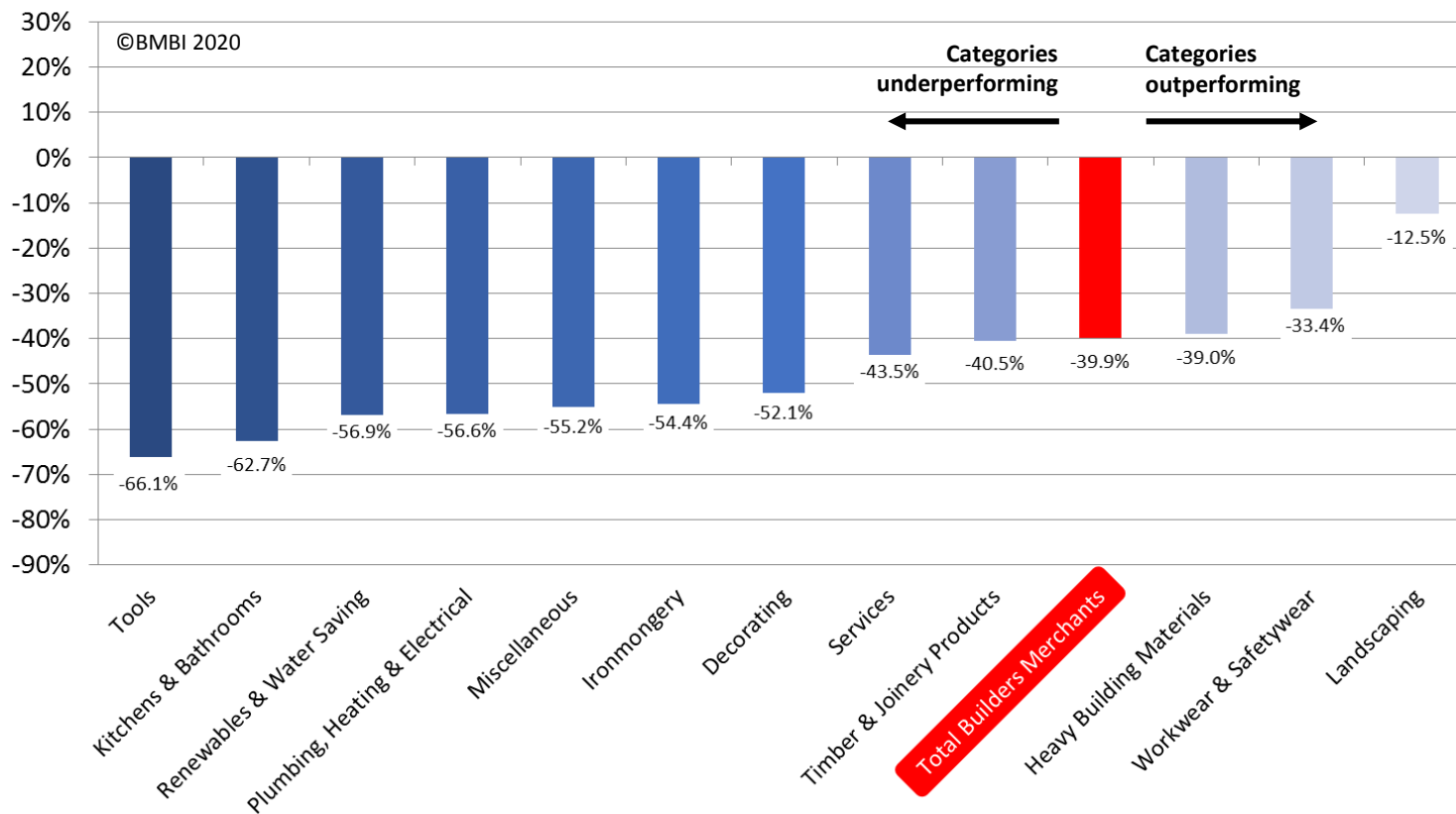
GfK Source: GfK's Builders Merchants Total Category Report July 2015 to May 2020

Monthly: This Year v Last Year

May 2020 sales indices



May 2020 index v May 2019 index



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

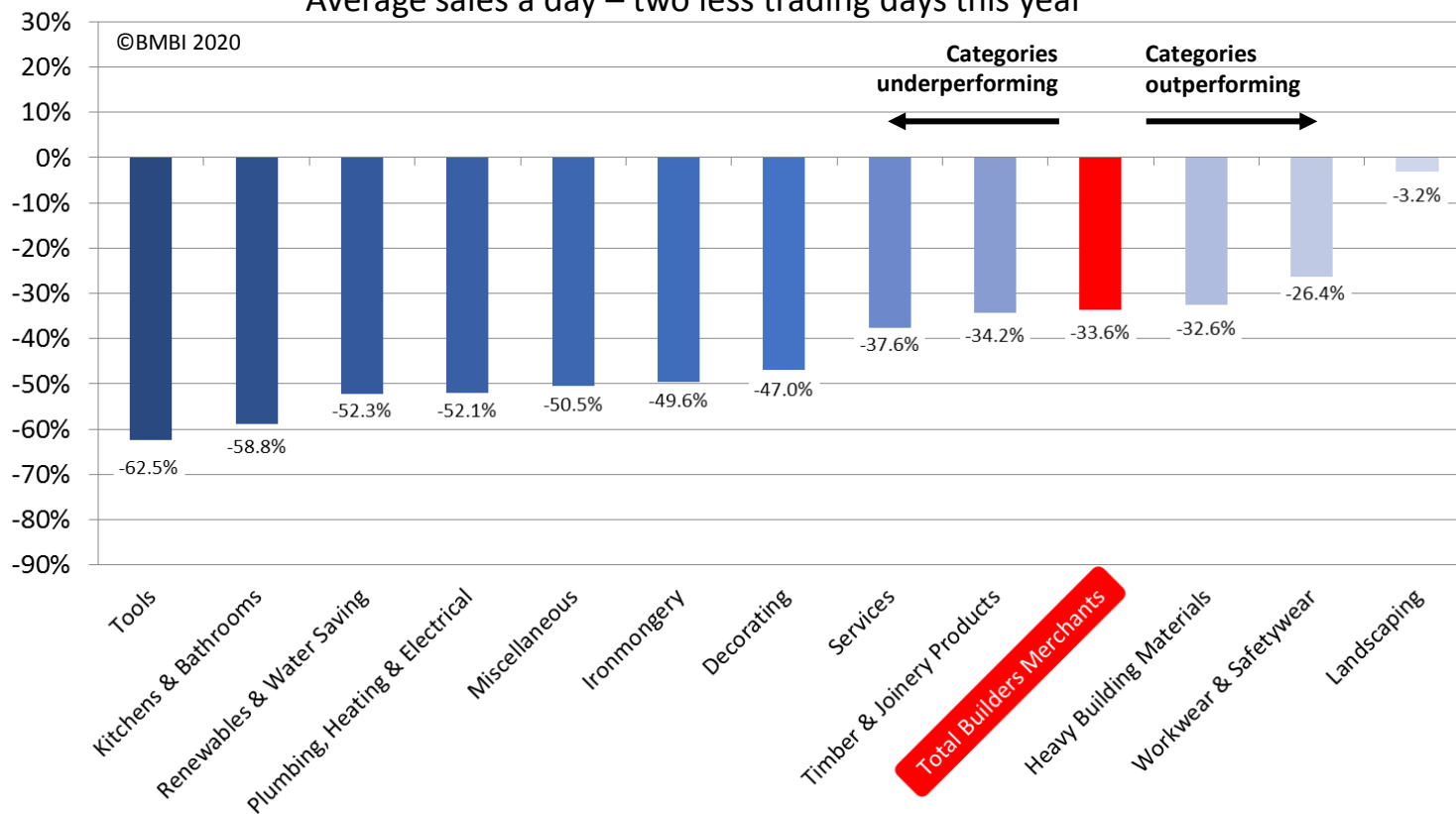
Monthly: This Year v Last Year

May 2020 average sales a day indices



May 2020 index v May 2019 index

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



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

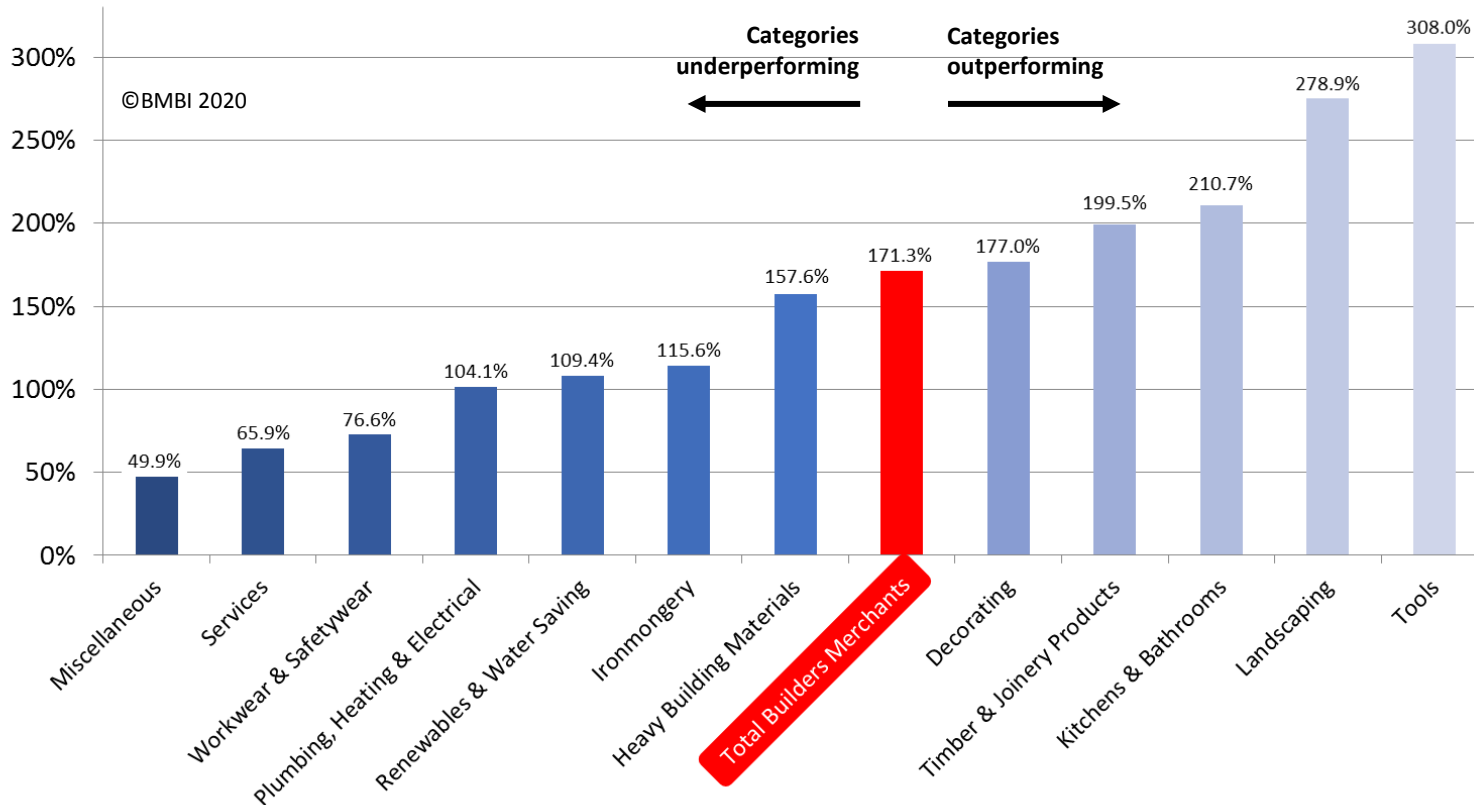
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Monthly: This Month v Last Month

May 2020 sales indices



May 2020 index v April 2020 index



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

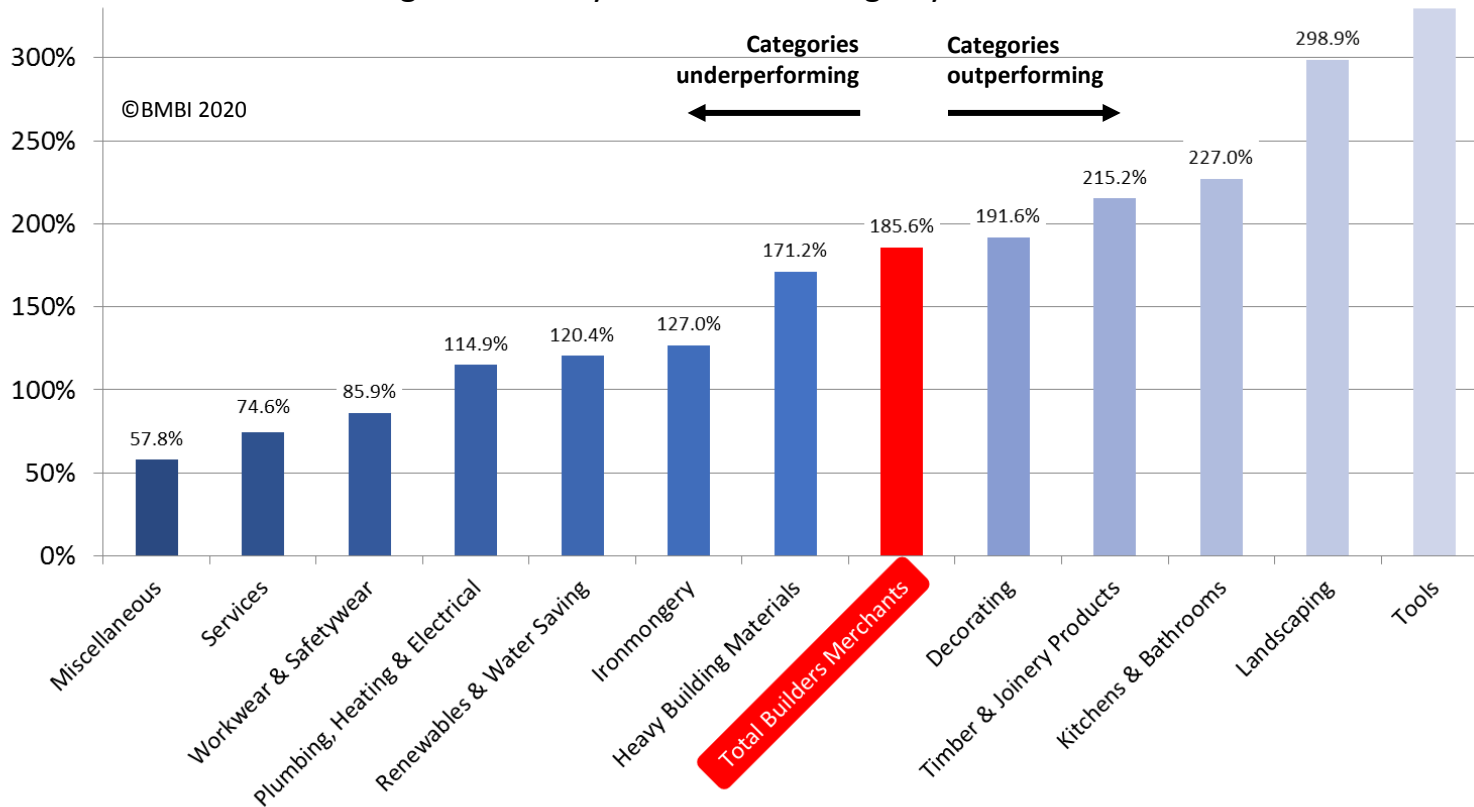
Monthly: This Month v Last Month

May 2020 average sales a day indices



May 2020 index v April 2020 index

Average sales a day – one less trading day this month*



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

*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

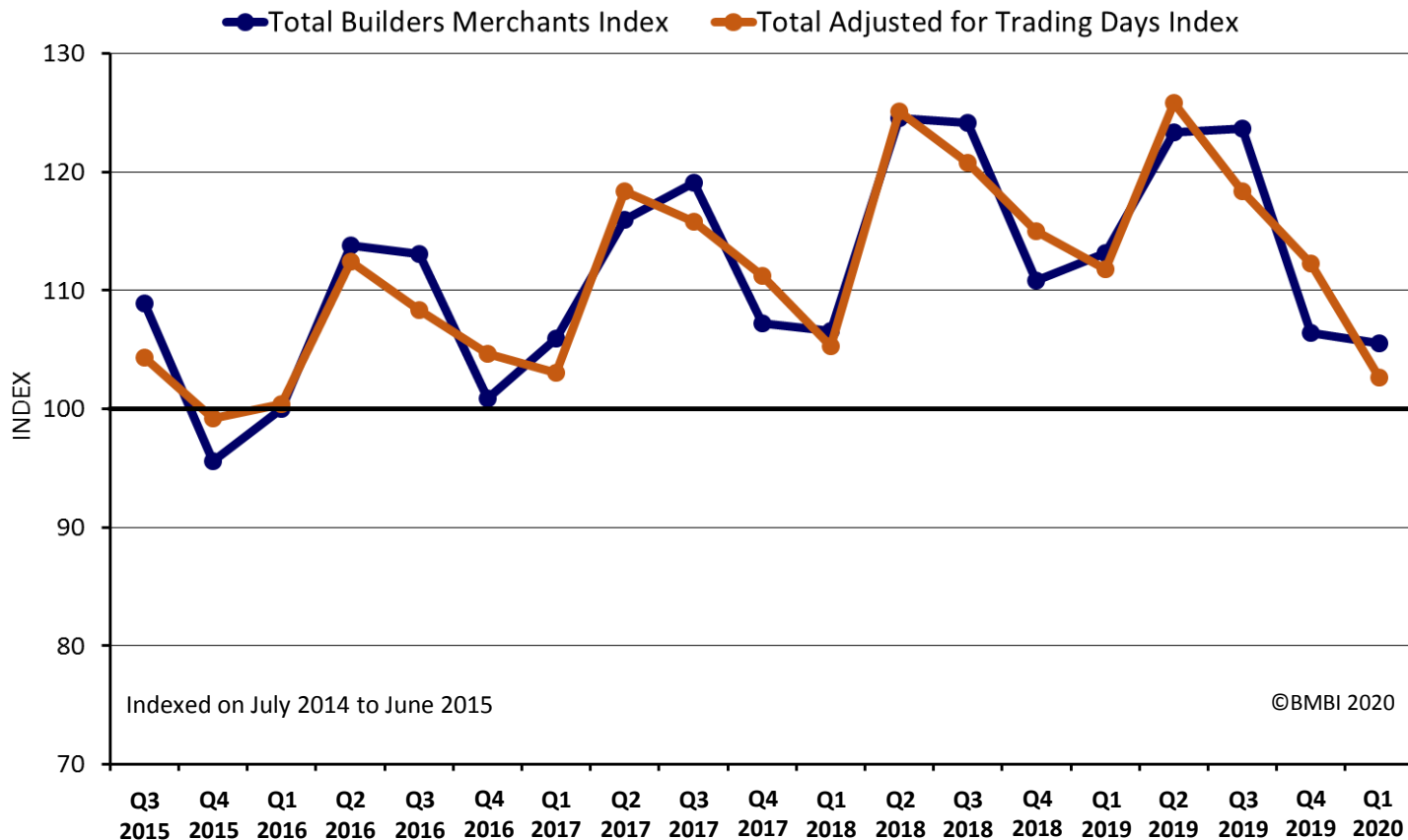
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.


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



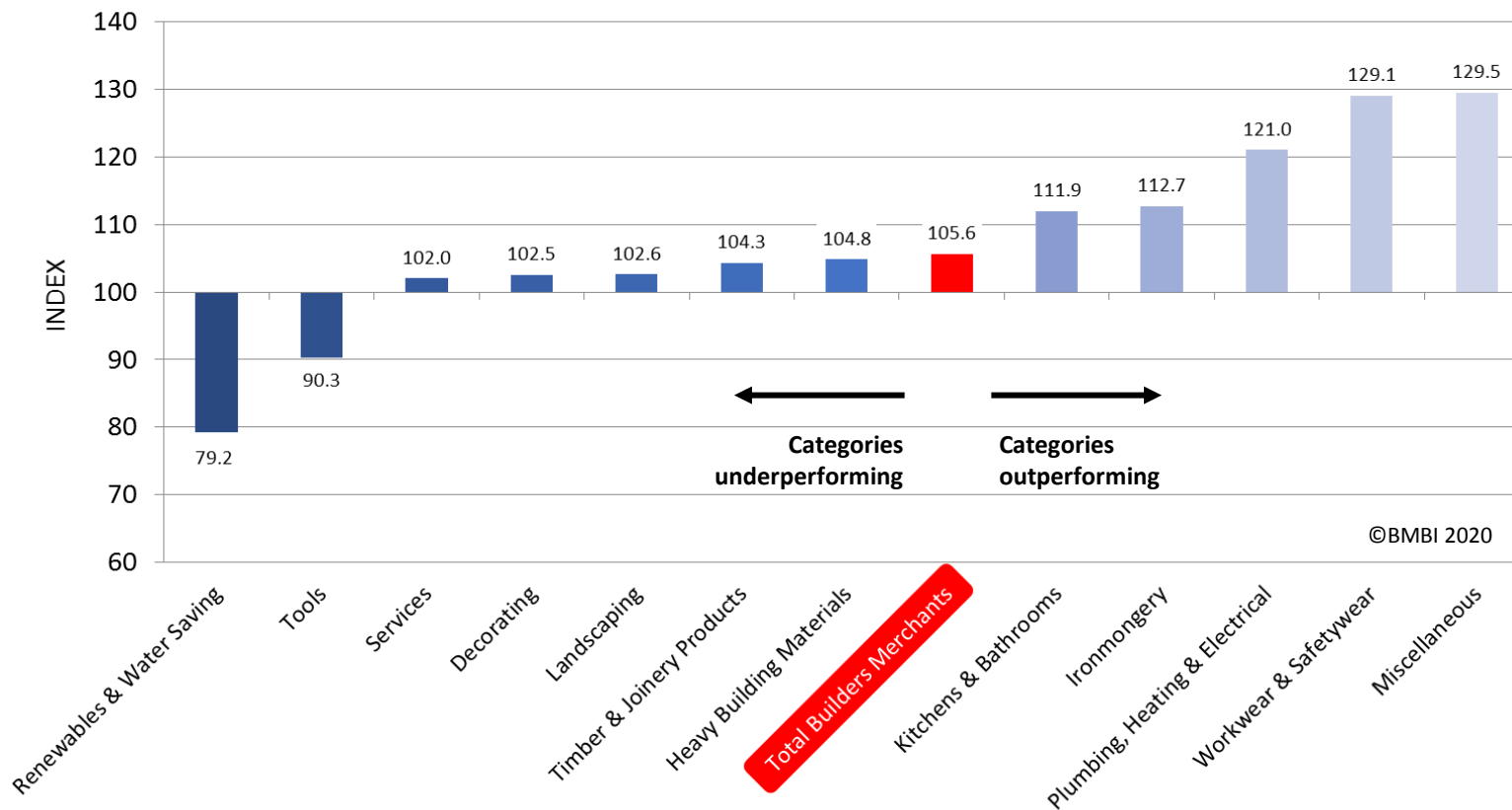
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

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

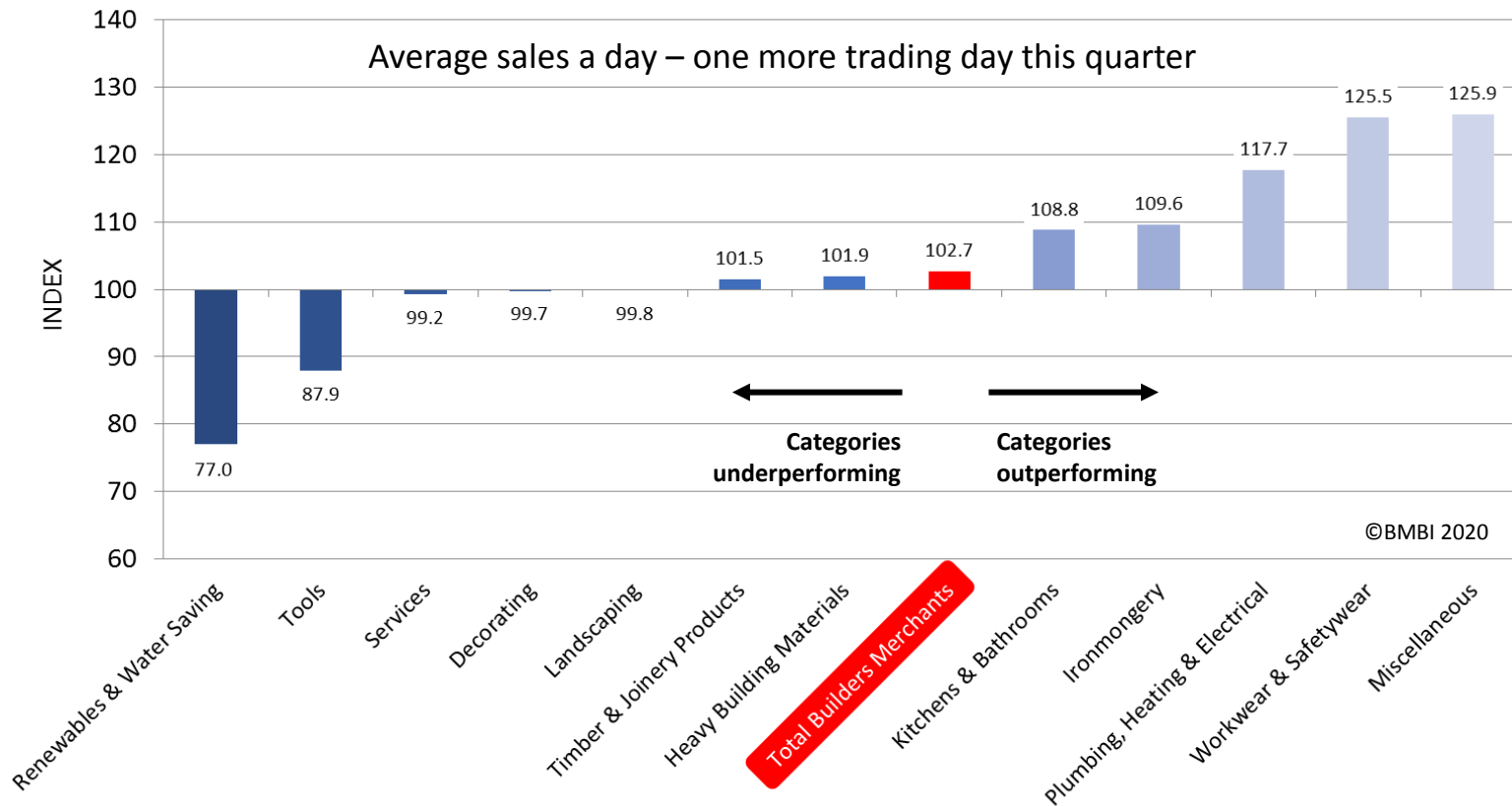
Quarterly: Index and Categories

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

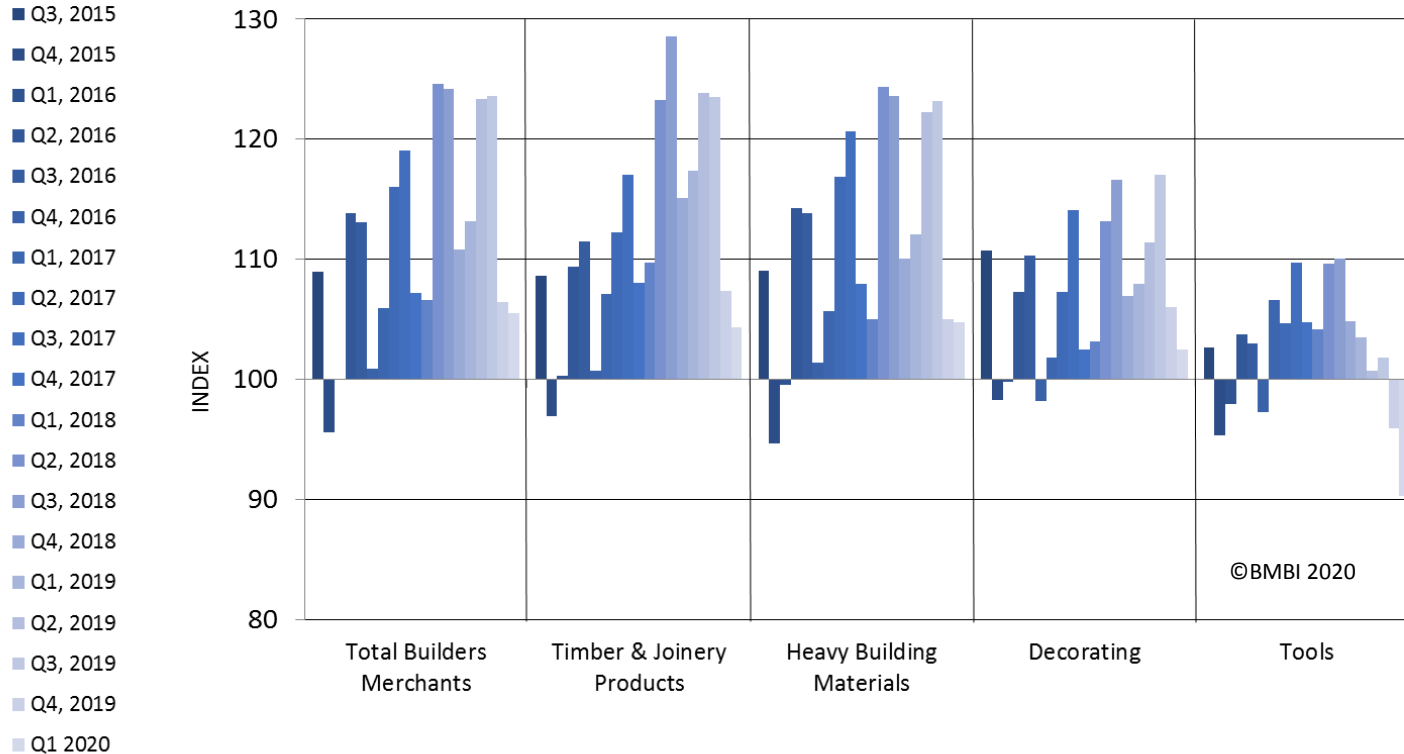
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

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



©BMBI 2020

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

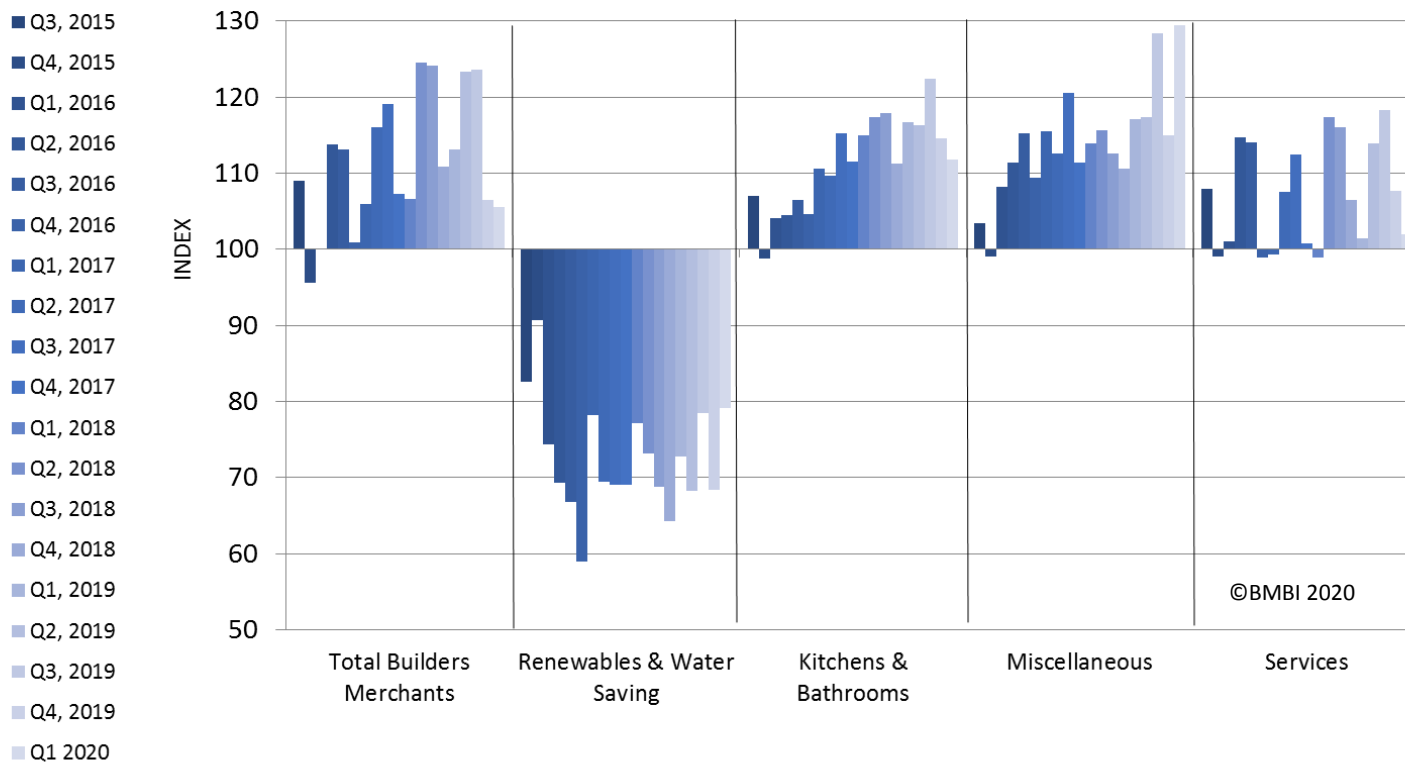
Indexed on July 2014 to June 2015

Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2020



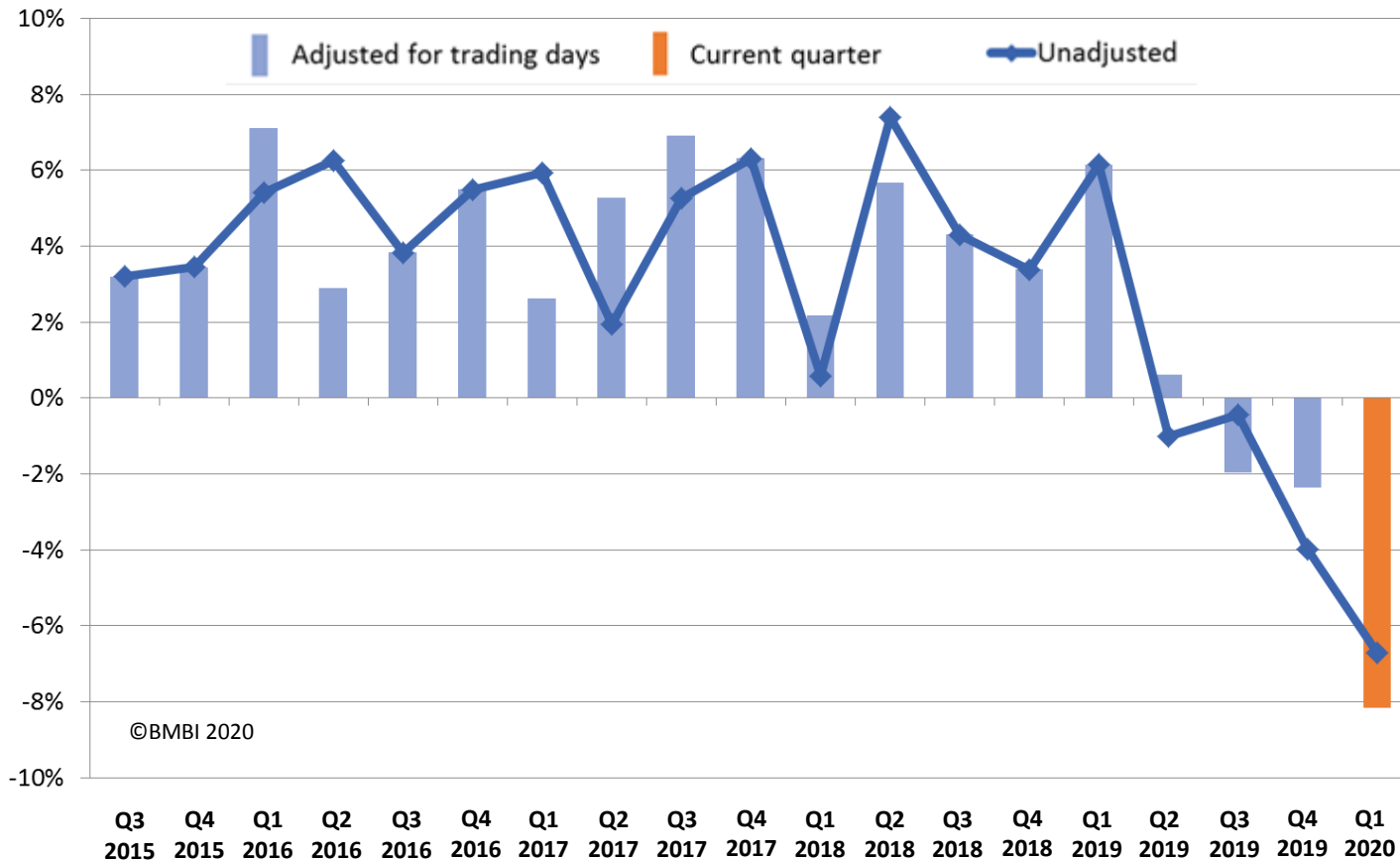
Indexed on July 2014 to June 2015

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



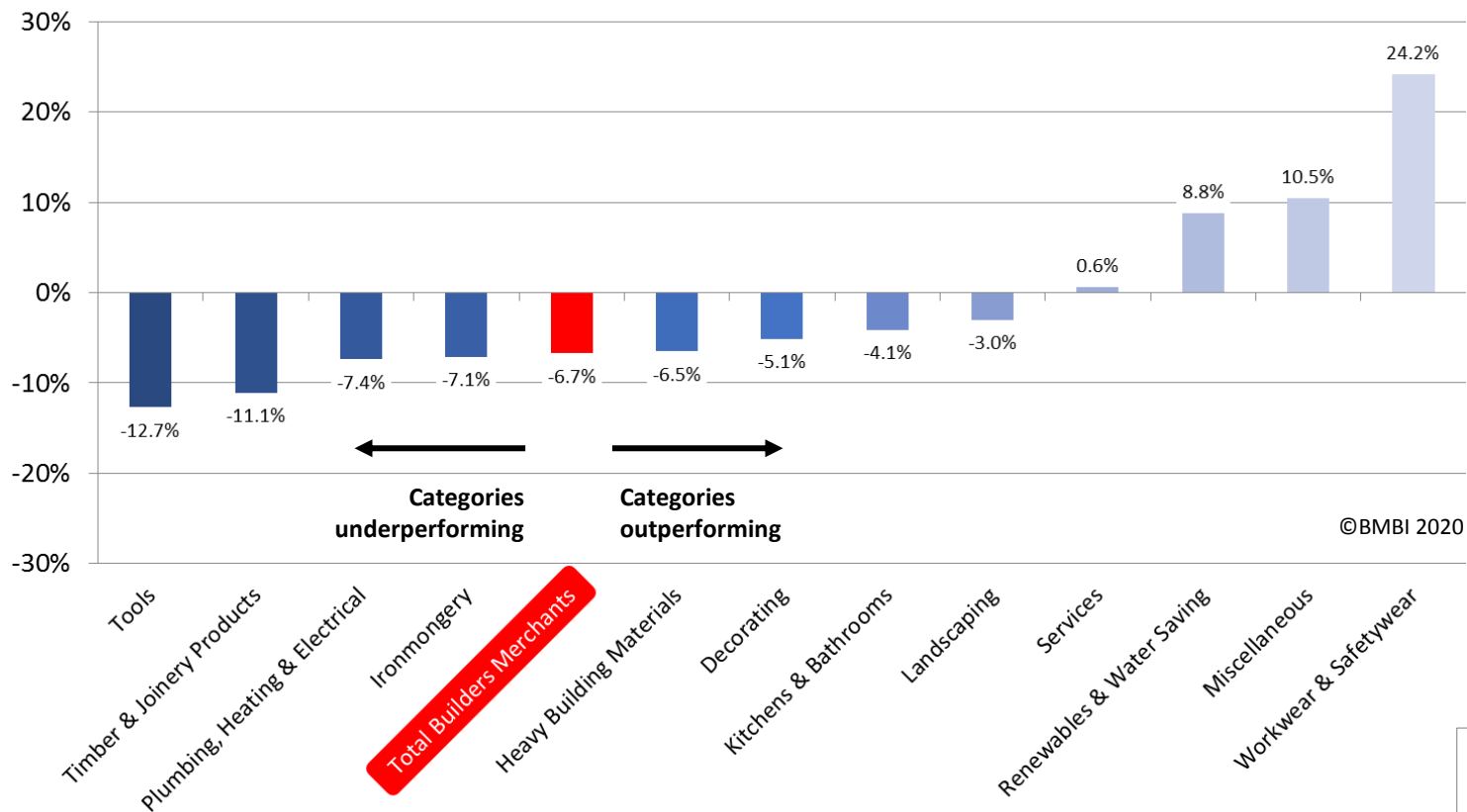
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

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



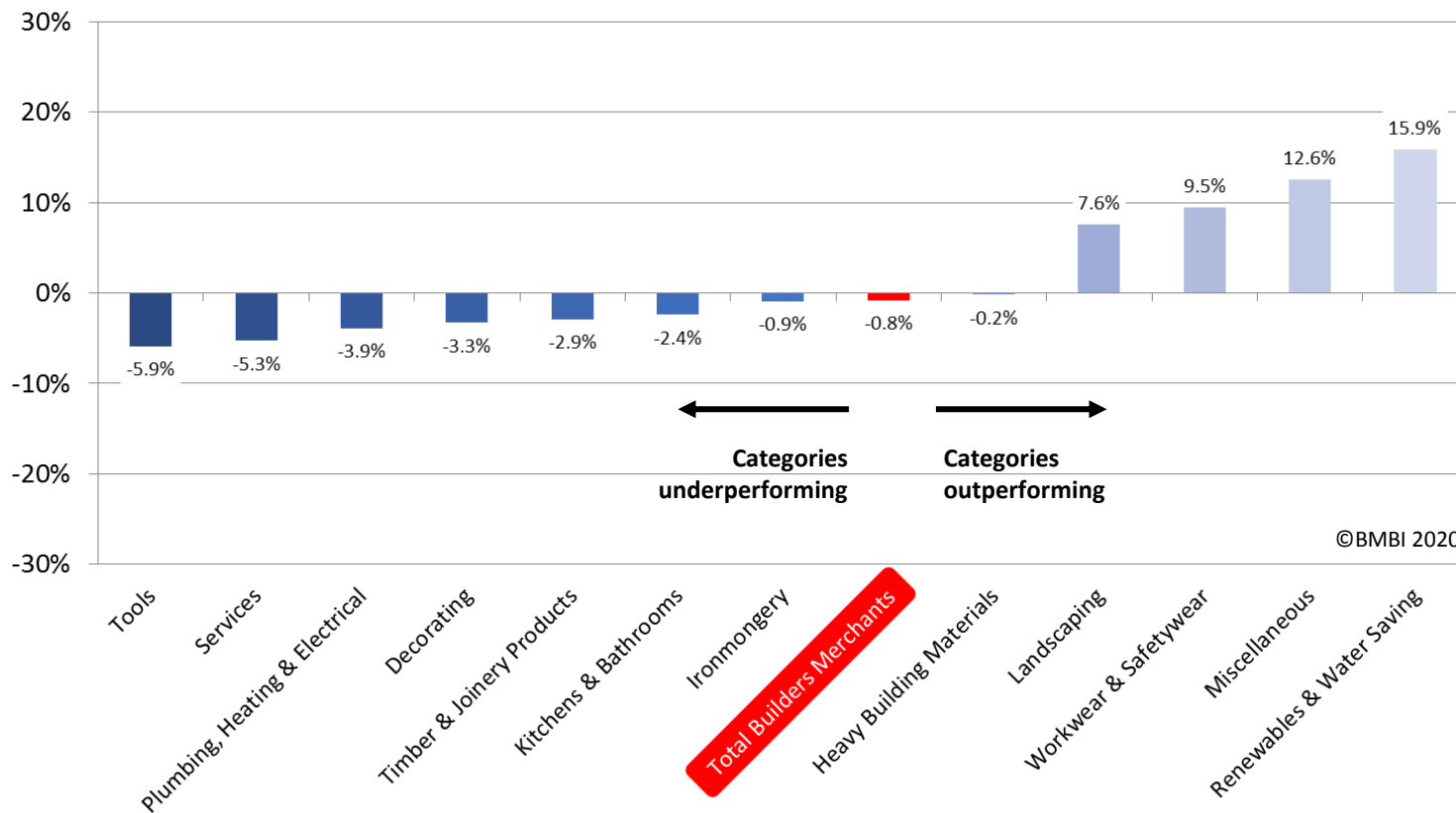
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Quarter on Quarter

Q1 2020 sales indices



Quarter 1 2020 index v Quarter 4 2019 index



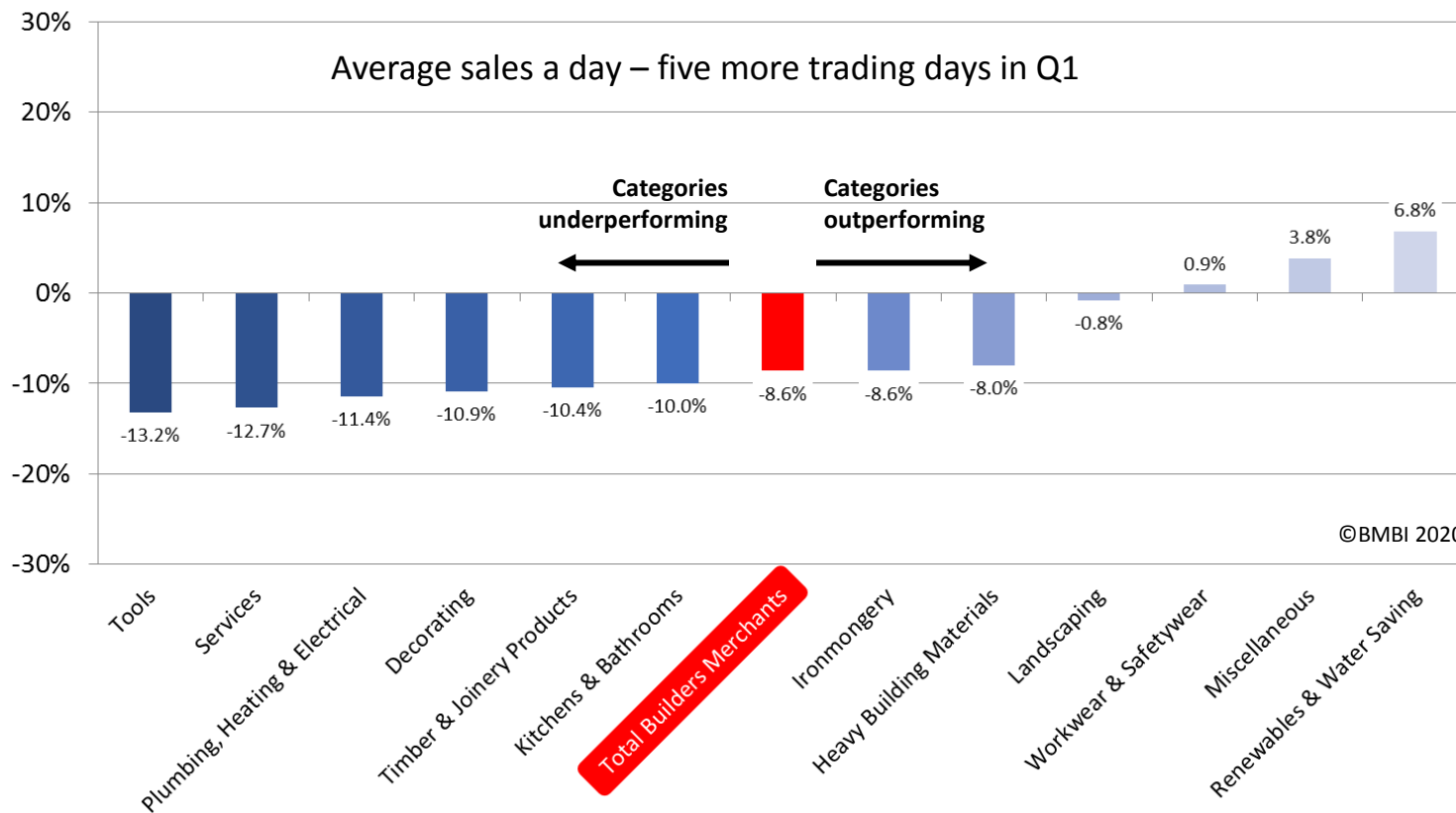
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Quarterly: Quarter on Quarter

Q1 2020 average sales a day indices



Quarter 1 2020 index v Quarter 4 2019 index



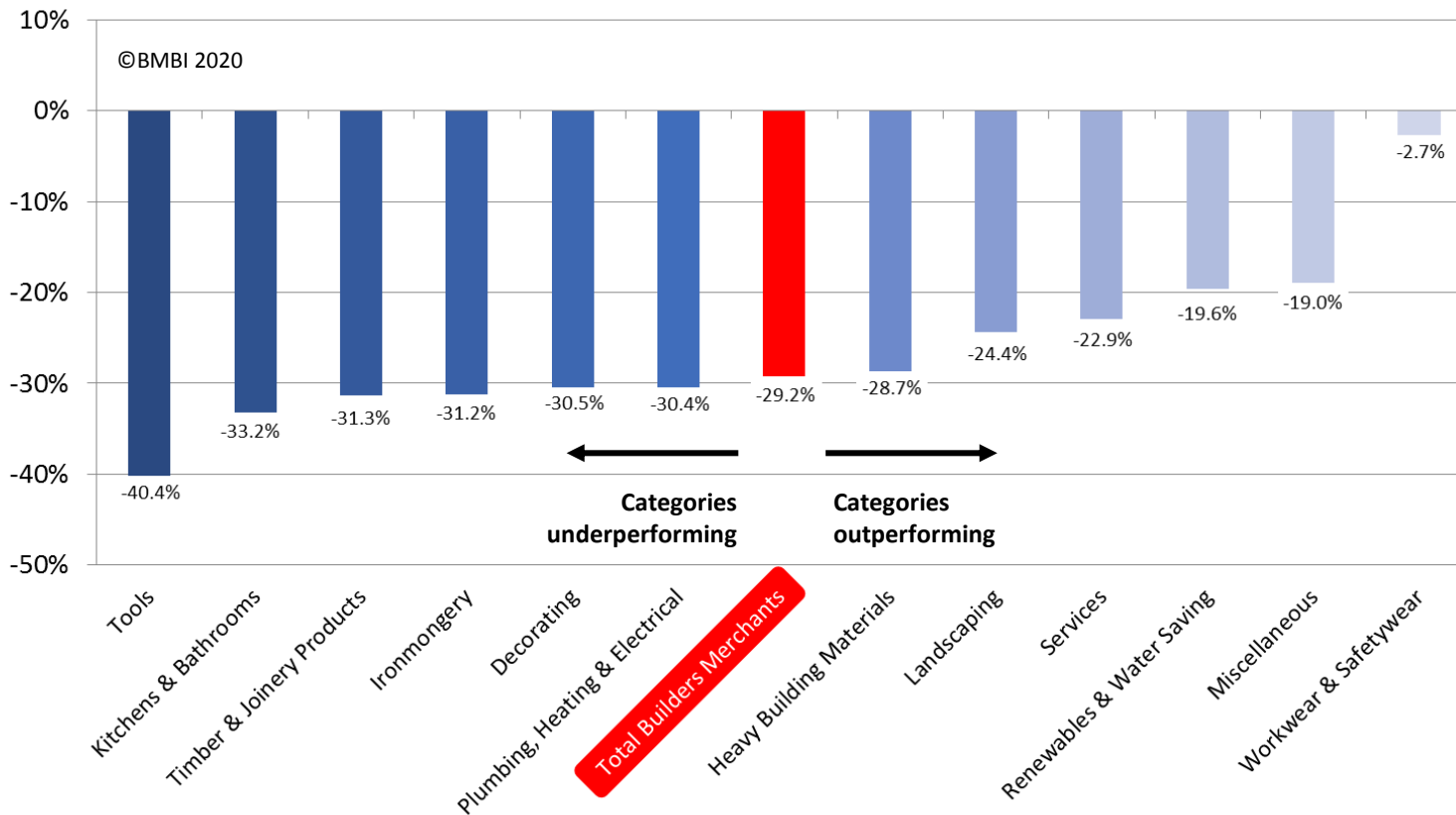
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2020

Year to date: Year on Year

Last 5 months sales indices



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



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

Year to date: Year on Year

Last 5 months average sales a day indices

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



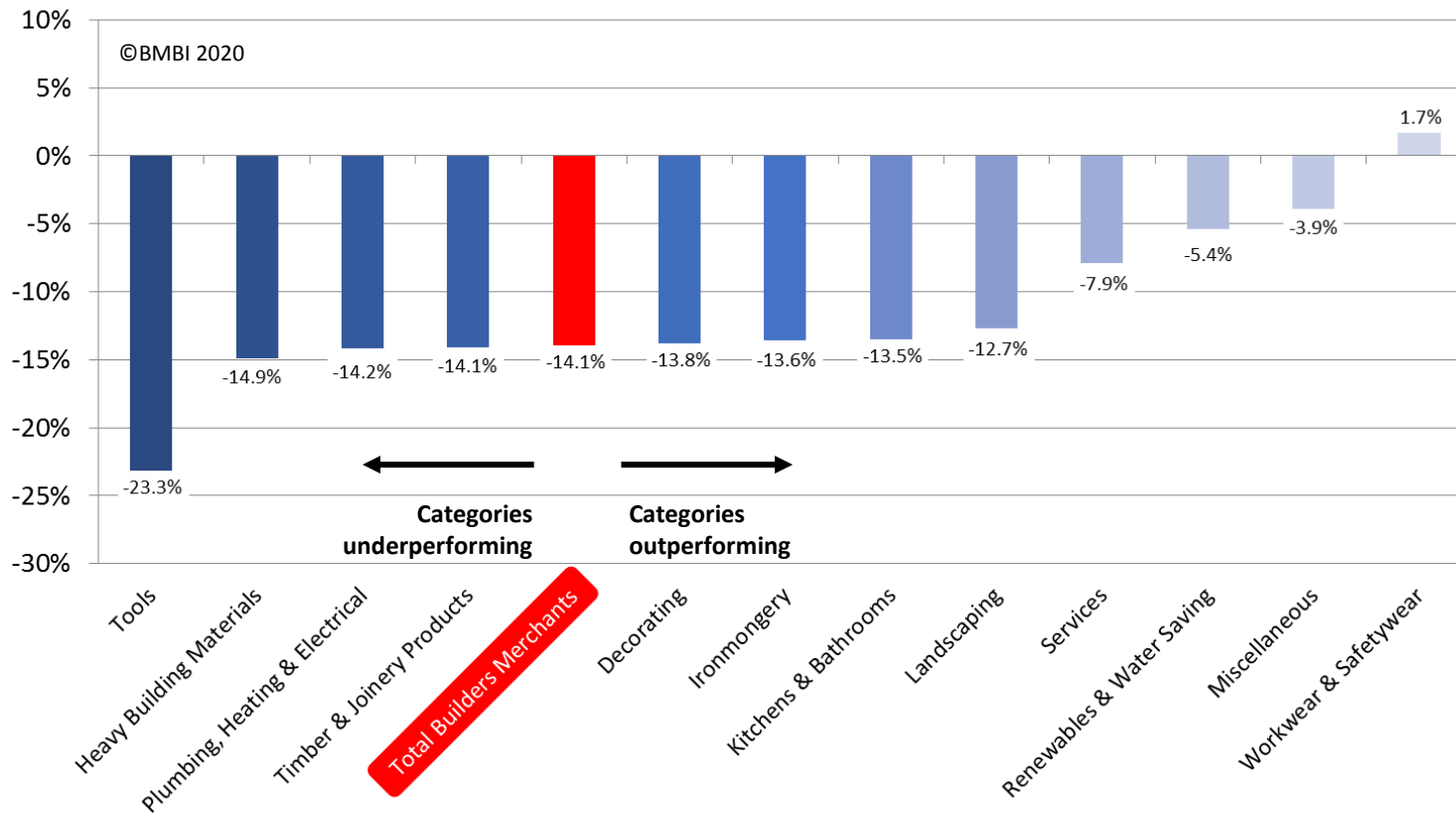
GfK Source: GfK's Builders Merchants Total Category Report July 2015 to May 2020

*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Last 12 Months: Year on Year

Rolling 12 months sales indices

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



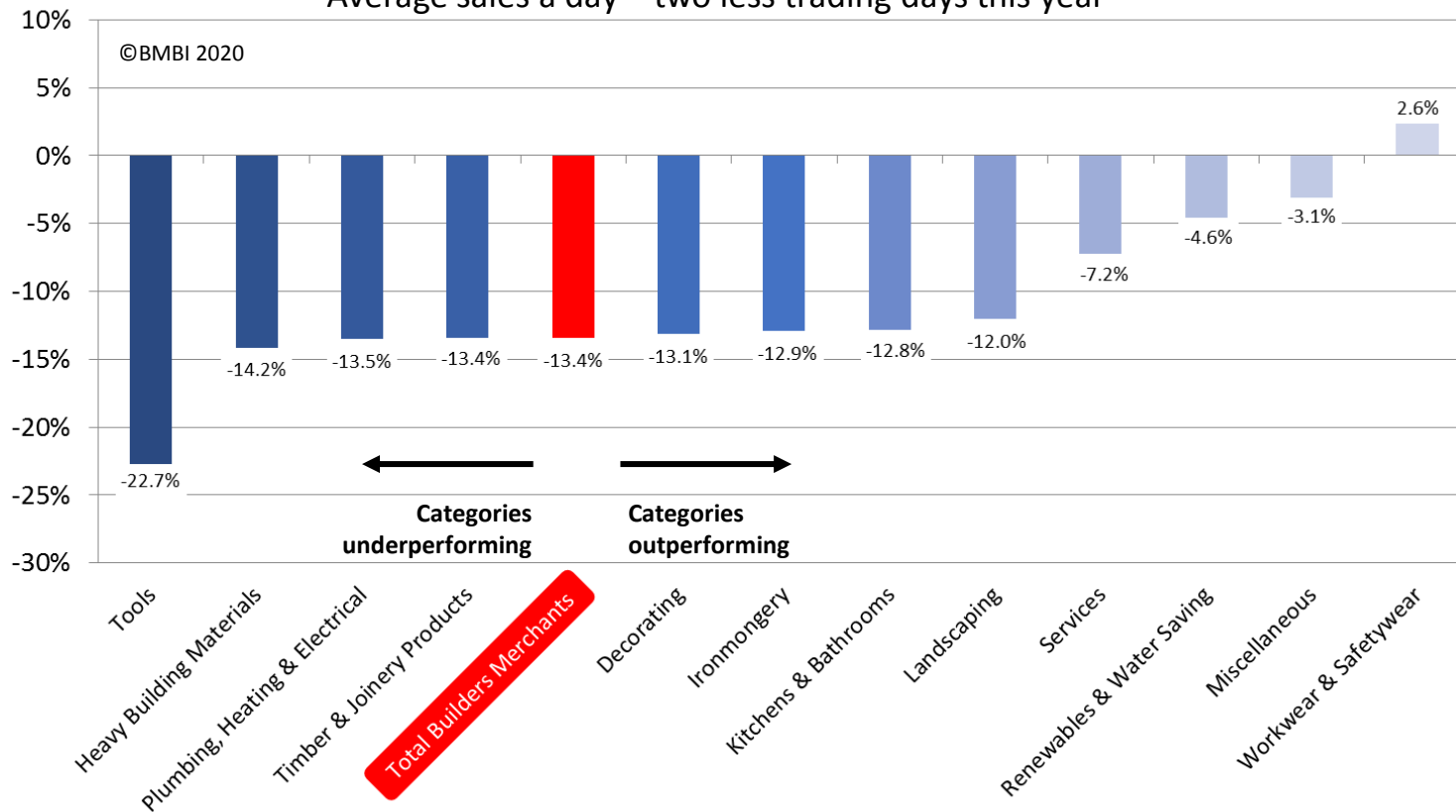
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2020

Last 12 Months: Year on Year

Rolling 12 months average sales a day indices

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

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



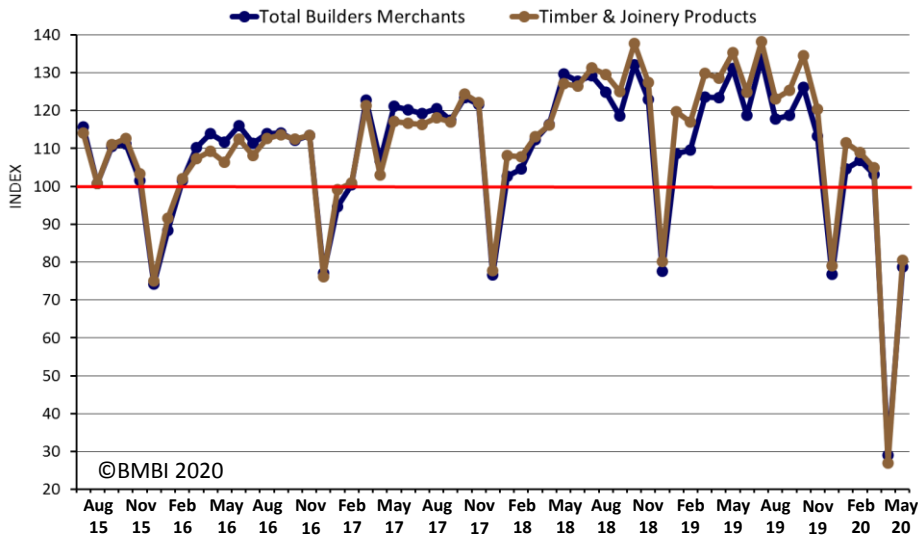
 Source: GfK's Builders Merchants Total Category Report July 2015 to May 2020

*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Monthly: Indices

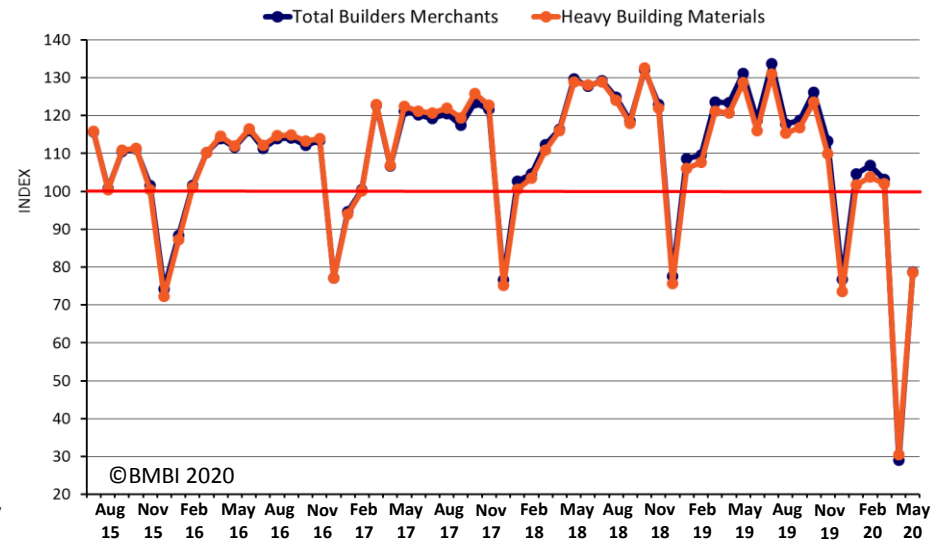
May 2020

Timber & Joinery Products




Indexed on July 2014 – June 2015

Heavy Building Materials



Indexed on July 2014 – June 2015

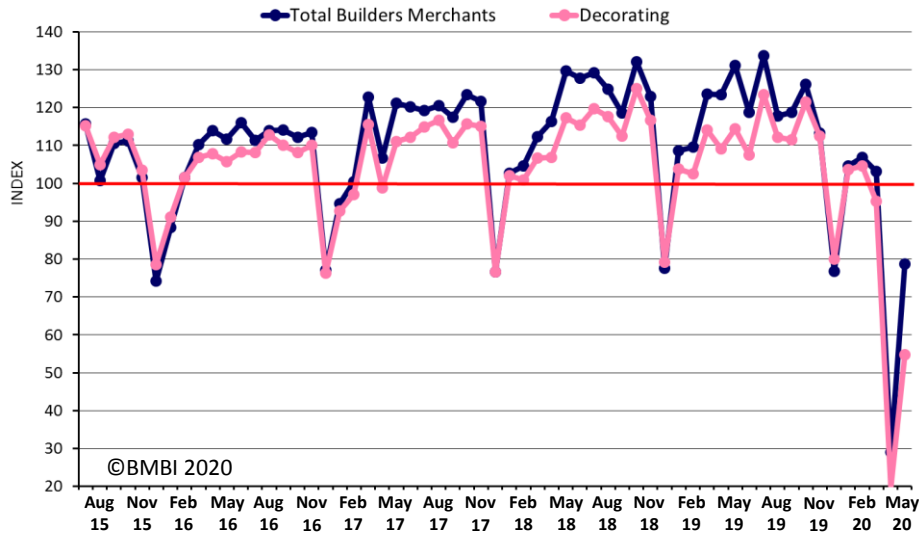
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2020

Monthly: Indices

May 2020

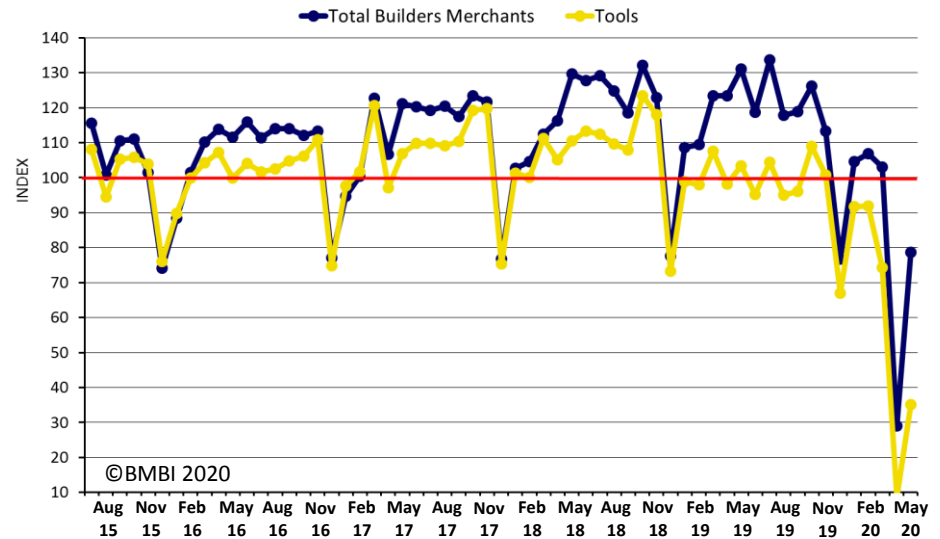


Decorating



Indexed on July 2014 – June 2015

Tools



Indexed on July 2014 – June 2015

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

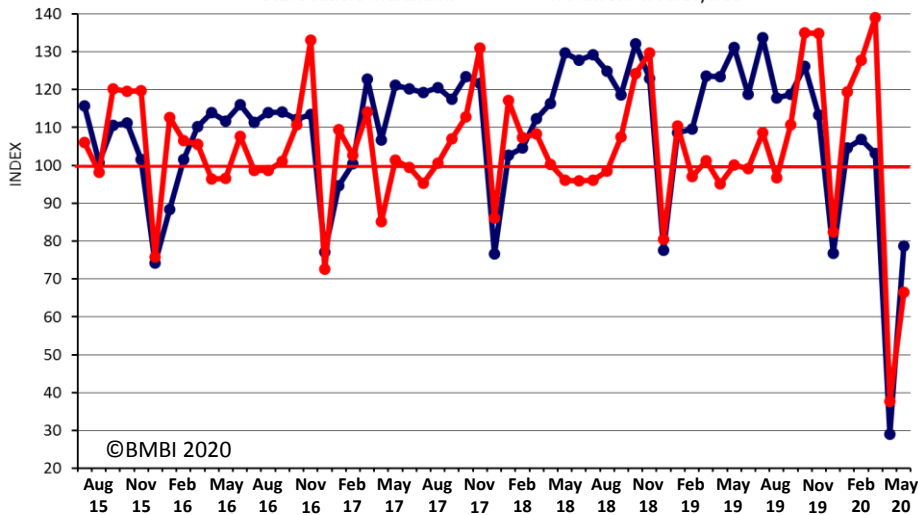
Monthly: Indices

May 2020



Workwear & Safetywear

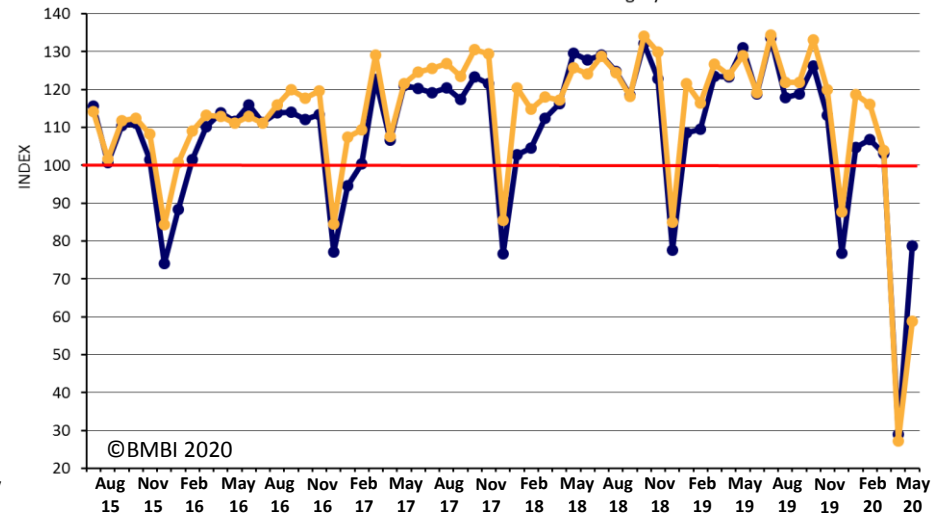
— Total Builders Merchants — Workwear & Safetywear




Indexed on July 2014 – June 2015

Ironmongery

— Total Builders Merchants — Ironmongery



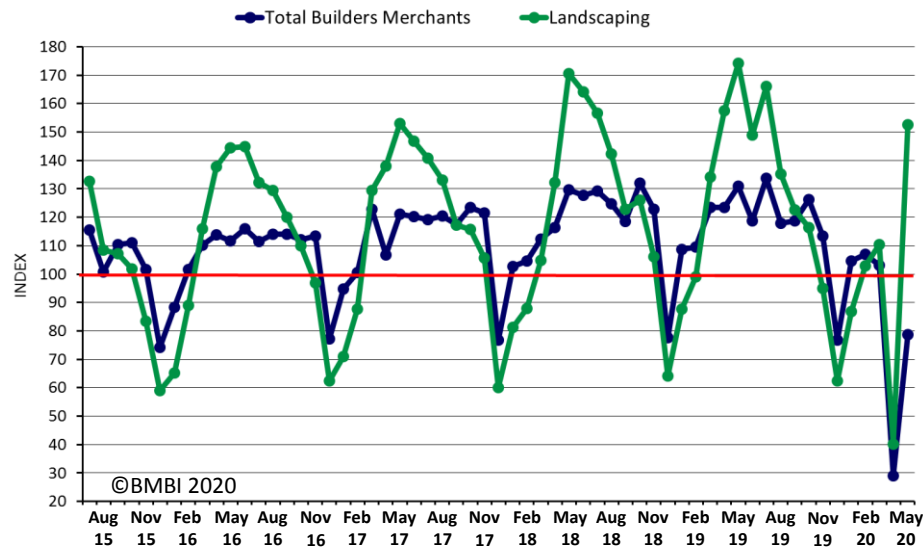
Indexed on July 2014 – June 2015

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

Monthly: Indices

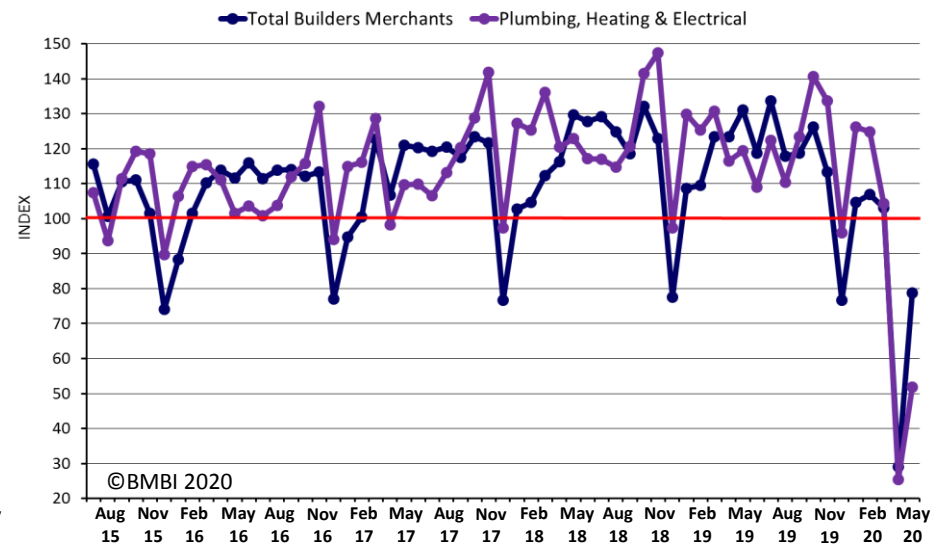
May 2020

Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



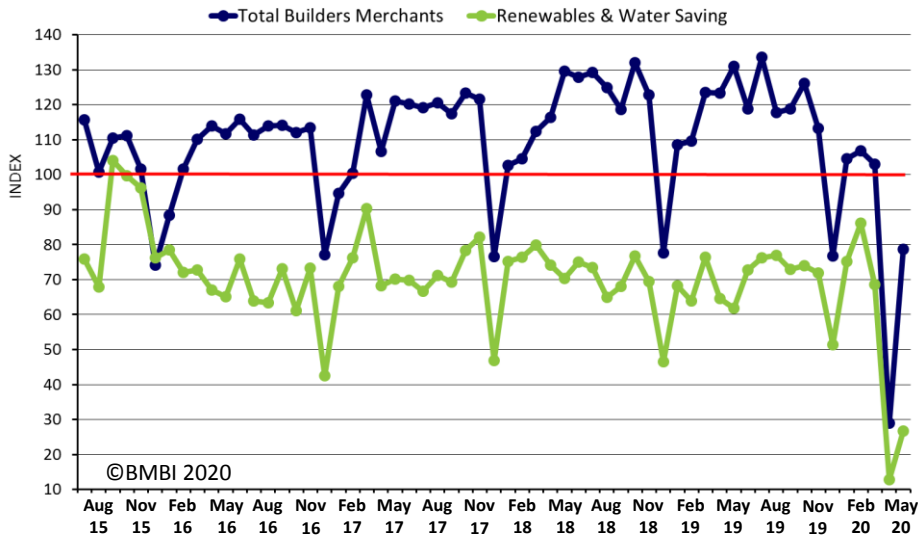
Indexed on July 2014 – June 2015

Monthly: Indices

May 2020

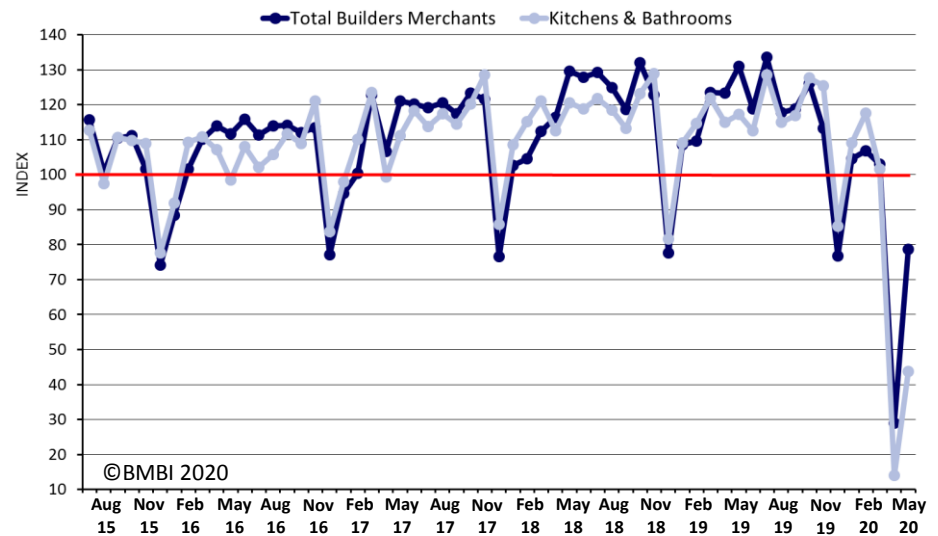


Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



Indexed on July 2014 – June 2015

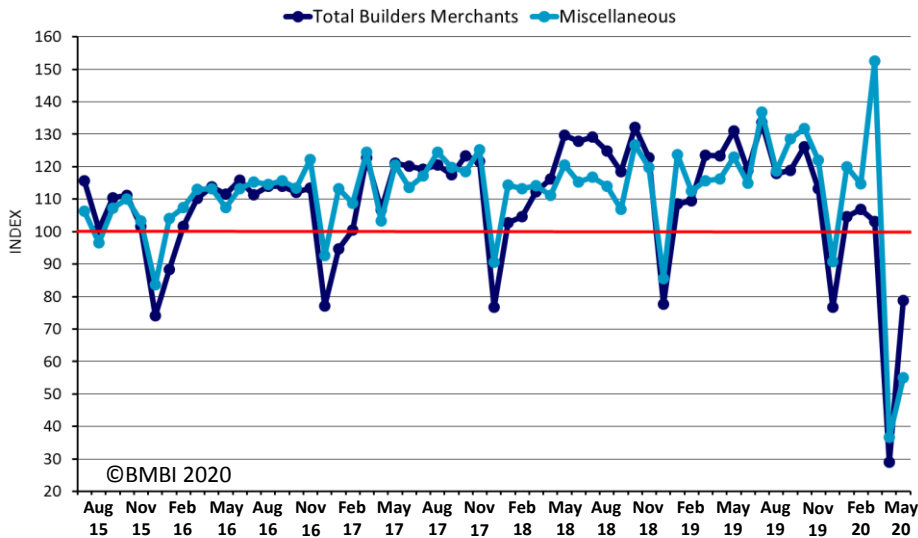
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2020

Monthly: Indices

May 2020

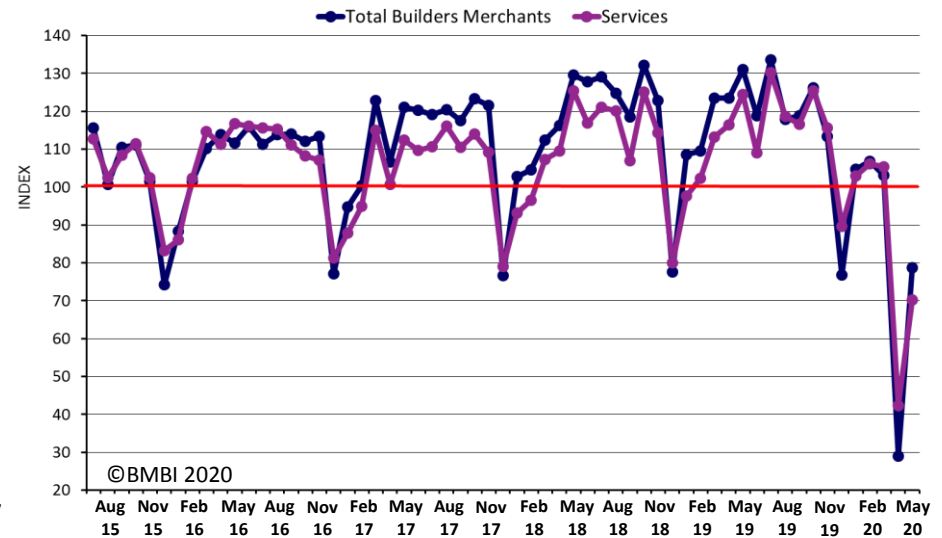


Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

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

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	23	22	15
2019											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	21	20	23	21	21	23	21	15
2020											
Jan	Feb	* Mar	* Apr	* May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19							

Quarterly

Index: 62.4

2015			
		Q3	Q4
		64	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	Q3	Q4
63	61	65	59
2020			
Q1	Q2	Q3	Q4
64			

Half Year

Index: 124.8


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

Full Year

Index: 249.6

2015
2016
2017
2018
2019
2020
250
249
249
248

*Due to the Covid-19 pandemic, some merchants temporarily closed branches in the period March to May 2020, hence their trading days may have differed from the standard numbers shown above.

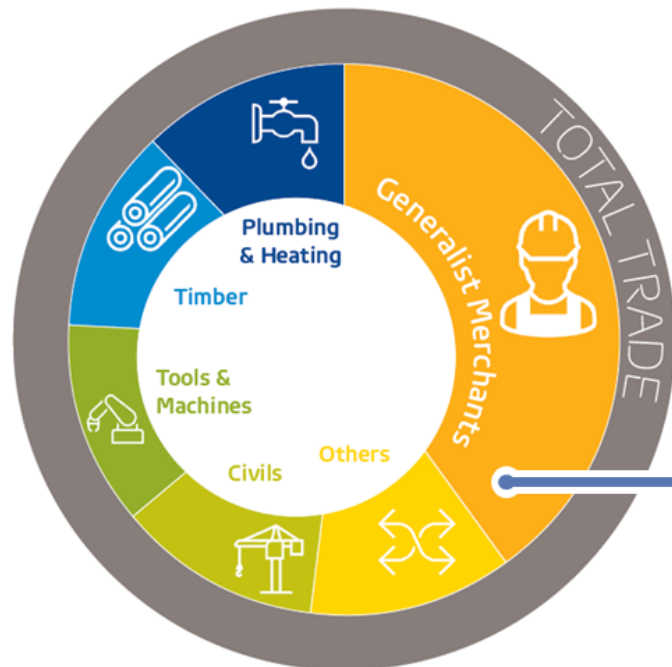
 Source: GfK's Builders Merchants Total Category Report July 2015 to May 2020

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



We define the Builders Merchants channel as the following:



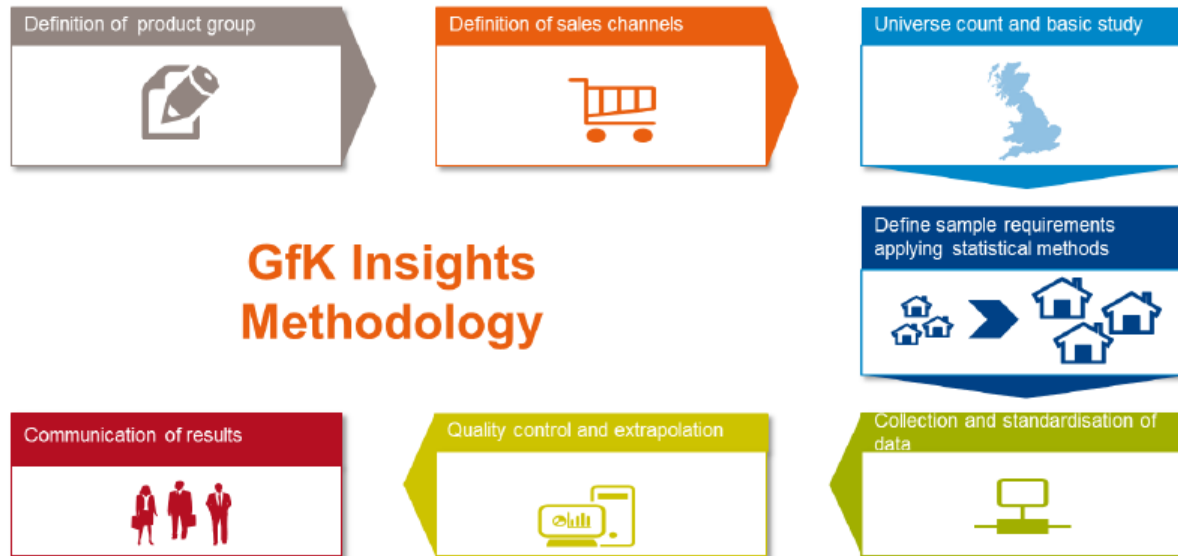
Generalist Builders Merchants definition

- 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. This excludes branches that generate all of their sales from specialized areas such as Civils, Tiles and Tools. Estimated coverage of this channel sits at 82%.
- 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

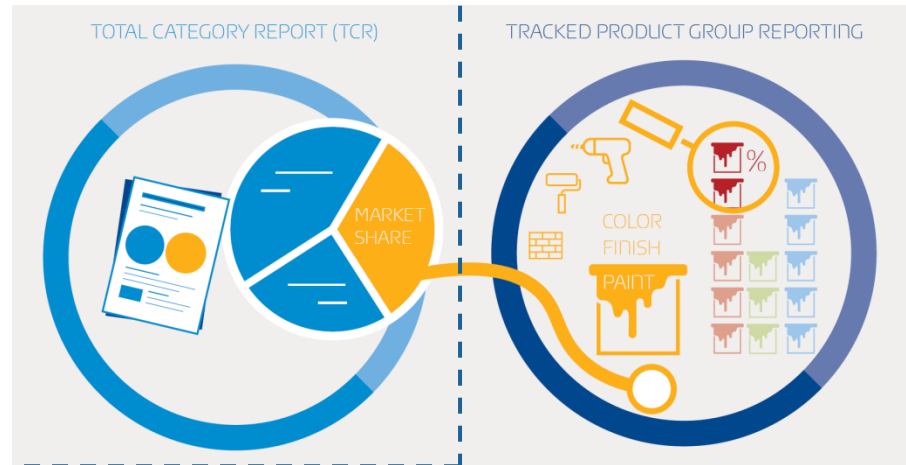
- Bathroom (Including Showering)
- Fitted Kitchens
- Major Appliances

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



Emile van der Ryst

Senior Client Insight Manager - Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615



Neil Frackiewicz

Head of Retail UK

Neil.frackiewicz@gfk.com

+44 (0) 20 7890 9123



Nyssa Patel

Industry Analyst / Economist

nyssa.patel@bmf.org.uk

+44 (0) 24 7685 4994



Lucia Di Stazio

Managing Director

lucia@mra-marketing.com

+44 (0) 1453 521621



Tom Rigby

Commercial Manager

tom@mra-marketing.com

+44 (0) 7392 081276