

“building **excellence**  
in materials supply”

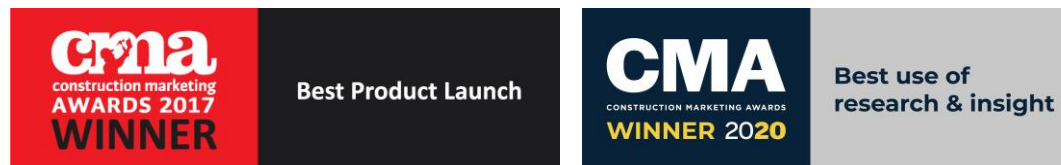
# Builders Merchant Building Index



## Monthly report for October 2020

(Published 17 December 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 Q3 2020 report.

The collage features several report covers and charts:

- Monthly and Quarterly Indices:** A line and bar chart showing the Builders Merchant Building Index for September 2020 and Q3 2020, with a focus on Landscaping.
- GfK's Product Categories:** A report cover titled 'GfK's Product Categories' with the subtitle 'Cover category headline values & in-depth, rel insights', listing various product categories like Landscaping, Plumbing/Heating/Electrical, etc.
- Macro factors impacting Merchants:** A report cover with a GfK logo.
- Consumer Confidence Index:** A line chart showing the Index Score of England MPC Interest rate from May 2019 to May 2020, with a 'High' label and a 'Low' label.
- Expert Panel:** A report cover for 'Natural Stone Landscaping Products' by TALASEY GROUP, featuring Malcolm Gough, Group Sales & Marketing Director.
- In-depth product group reporting:** A report cover with a pie chart and the text 'In-depth product group reporting'.

# 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, Dulux Trade and Lakes. Meet the Experts [here](#) and on pages 9 and 10 of this report.

## 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.

BMBI was recently recognised at the prestigious 2020 Construction Marketing Awards (CMA), winning the 'Best Use of Research and Insight' category.

## More data available

This BMBI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and include sales value data. GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you.

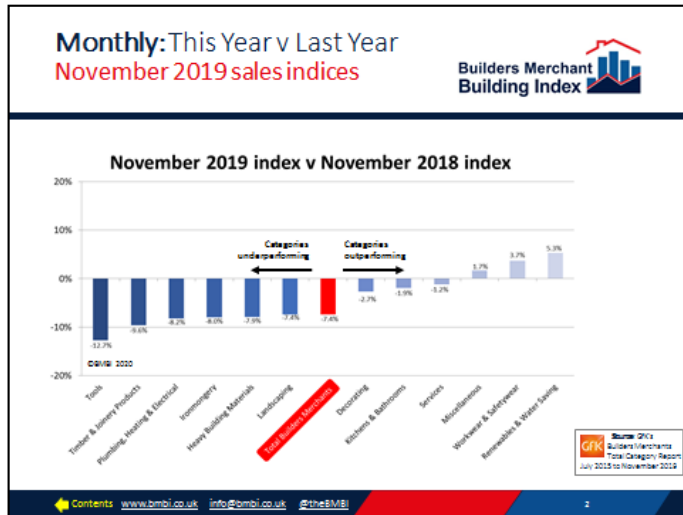
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

# 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.

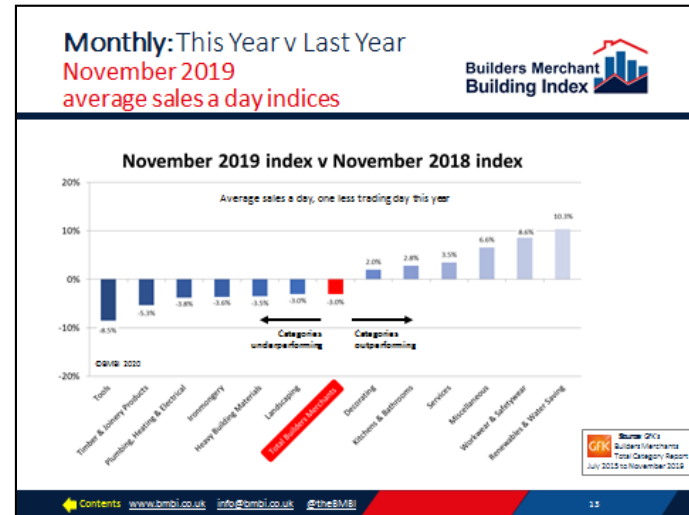
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

## 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.

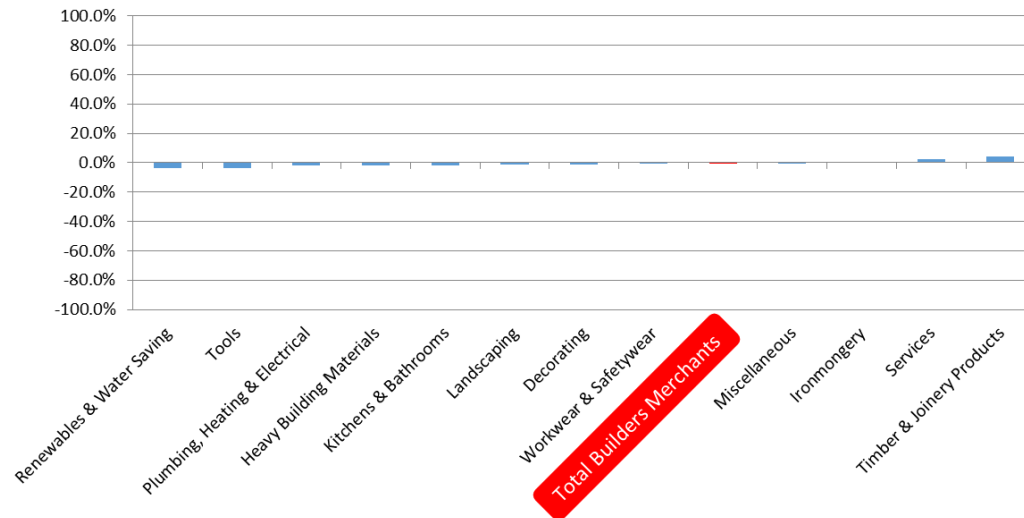
# GfK's Builders Merchant Panel update



After almost six years without change, GfK's Builders Merchant Panel, which powers the Builders Merchant Building Index, saw three merchants leave and three join in Spring 2020. A lengthy transition period took place in the background and as a result, data covering January 2019 onwards now reflects the new panel. This has ensured the robust nature of the Builders Merchant Building Index has been maintained.

The overall impact of the changes was 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 had 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 was more significant, and only Timber & Joinery Products and Tools among the main categories were appreciably different, as illustrated in this chart.

**Change in revenue May 2019 to Apr 2020**



The tables and charts in this report use the refreshed data from January 2019 onwards. For example, the values between October 2019 and April 2020 in the Indices table on page 12 are marginally different to those in reports published prior to May 2020. 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](mailto:Tom@mra-marketing.com) or [Emile.van-der-Ryst@gfk.com](mailto:Emile.van-der-Ryst@gfk.com)

# Overview

## October sales flat but Landscaping and Timber & Joinery Products shone

### Year-on-Year

Total Builders Merchants October value sales were 0.2% higher than in October 2019, with one less trading day this year. Two categories sold more, led by Landscaping (+16.5%). Timber & Joinery Products (+5.0%) had its highest monthly turnover since BMBI data was first recorded in July 2014. Sales were driven by Timber – which encompasses Carcassing (Treated & Untreated), Timber Battens, Softwood, Hardwood, Pre-Cut Timber, Panels, Planks, Stud Work, Partitions, Roof Trusses and Porches. Largest category Heavy Building Materials was 0.6% lower. Indoor categories saw larger falls, with Plumbing Heating & Electrical (-10.5%) weakest. Decorating (-8.1%) and Kitchens & Bathrooms (-6.5%) were also down.

Average sales a day, which take trading day differences into account, were 4.7% up on October 2019.

### Month-on-Month

Total Merchants October sales were 1.8% lower than in September. Five of the categories sold more this month, with Workwear & Safetywear (+12.7%) doing best, followed by Plumbing Heating & Electrical (+9.2%). Three categories were weaker than merchants generally, including Landscaping (-15.8%) and Heavy Building Materials (-2.1%).

### Other periods

Sales in the last three months (August to October) were up 1.5% overall compared with the same three months in 2019, with one less trading day this year. Landscaping (+21.3%) did significantly better than other categories. Timber & Joinery Products (+4.7%) and Heavy Building Materials (+0.3%) also sold more. The other nine categories sold less, including Plumbing Heating & Electrical (-10.1%), Tools (-4.9%) and Kitchens & Bathrooms (-4.6%).

Sales were up 10.9% in the last three months compared with the previous three months (May to July). All but one of the categories sold more, with Kitchens & Bathrooms (+41.6%) and Plumbing Heating & Electrical (+40.7%) strongest. Decorating (24.1%) and Heavy Building Materials (+11.3%) also did better. Landscaping (-22.4%) was the only category that sold less in August to October, against very strong sales in May to July.

In the nine months January to October, total sales were down 13.8% compared with the same months in 2019. Landscaping (+2.8%) sold more and Workwear & Safetywear (+0.1%) was flat. The remaining ten categories all sold less, with Tools (-23.9%) Plumbing Heating & Electrical (-22.1%) and Kitchens & Bathrooms (-21.3%) weakest.

### Index

October's BMBI index was 126.4, with one more trading day this month. Timber & Joinery Products (141.1) was strongest.

Timber & Joinery Products (+5.0%) had its highest monthly turnover since BMBI data was first recorded in July 2014.



# 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 Q3 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: Q3 2020 Report](#)

#### Expert for Bricks & Roof Tiles:



**Kevin Tolson,**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q3 2020 Report](#)

#### Expert for Website & Product Data Management Solutions:



**Andy Scothern**  
Managing Director  
eCommonSense

[Read latest Comment: Q3 2020 Report](#)

#### Expert for Civils & Green Infrastructure:



**Steve Durdant-Hollamby,**  
Managing Director  
Polypipe Civils

[Read latest Comment: Q3 2020 Report](#)

#### Expert for Lead:



**Lynn Street**  
Sales & Marketing Manager  
Midland Lead

[Read latest Comment: Q3 2020 Report](#)

#### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q3 2020 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q3 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: Q3 2020 Report](#)

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



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

[Read latest Comment: Q3 2020 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q3 2020 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q3 2020 Report](#)

### Expert for Paint:



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

[Read latest Comment: Q3 2020 Report](#)

### Expert for Shower Enclosures and Showering:



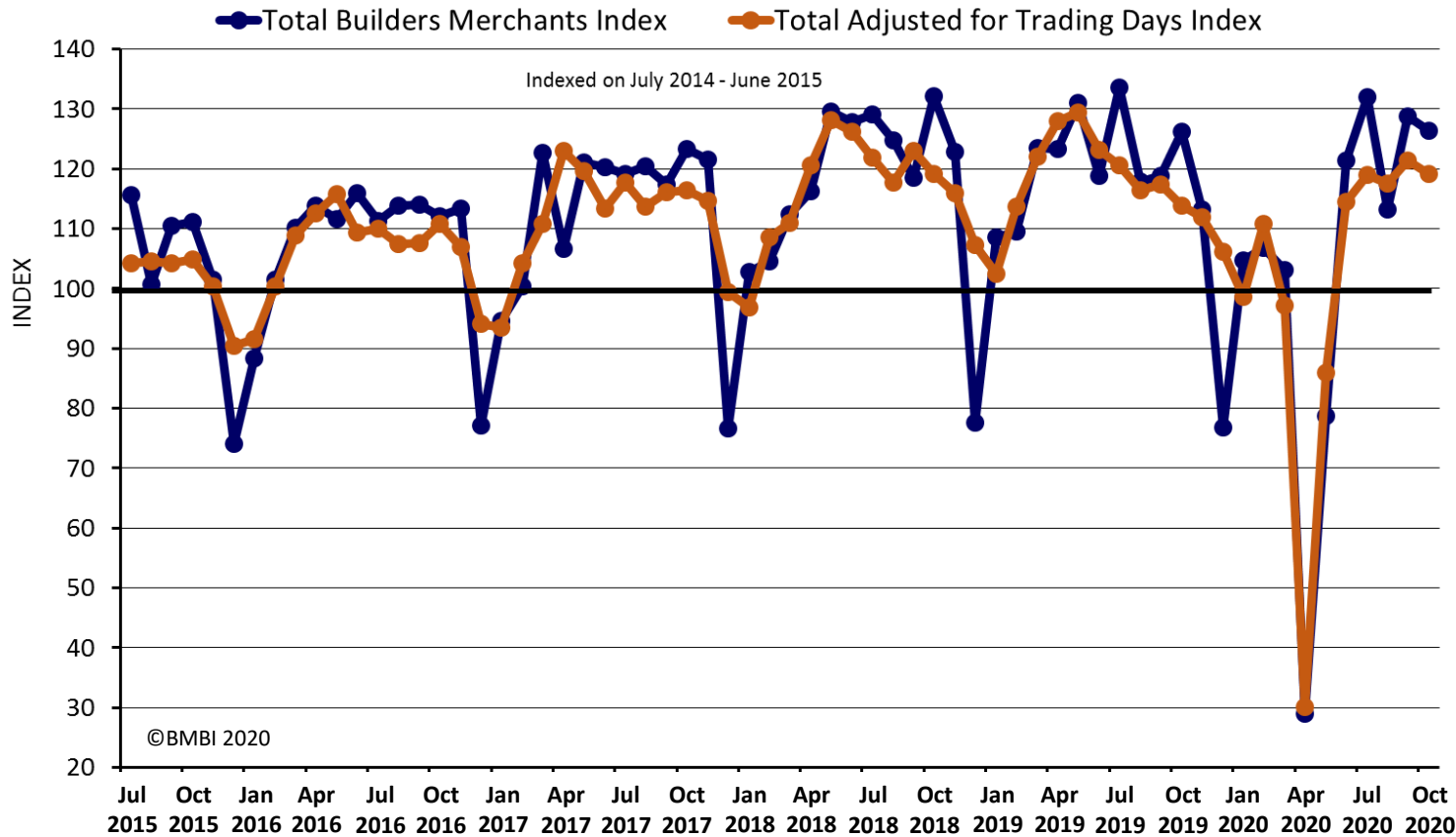
**Mike Tattam**  
Sales & Marketing Director  
Lakes

[Read latest Comment: Q3 2020 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 October 2020

# Monthly: Index and Categories

October 2019\* – October 2020

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



		2019			2020									
MONTHLY SALES VALUE INDEX	Index	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct
<b>Total Builders Merchants</b>	<b>100</b>	<b>126.2</b>	<b>113.3</b>	<b>76.8</b>	<b>104.7</b>	<b>106.9</b>	<b>103.1</b>	<b>29.0</b>	<b>78.7</b>	<b>121.4</b>	<b>131.9</b>	<b>113.3</b>	<b>128.7</b>	<b>126.4</b>
Timber & Joinery Products	100	134.4	120.4	79.1	111.5	109.0	105.0	26.9	80.5	126.7	140.3	120.6	139.3	141.1
Heavy Building Materials	100	123.5	109.9	73.5	101.7	103.8	102.0	30.5	78.5	116.4	125.6	108.6	125.4	122.8
Decorating	100	121.5	112.5	80.0	103.6	104.5	95.2	19.8	54.8	94.4	112.4	100.1	113.1	111.7
Tools	100	108.9	100.8	67.0	91.8	91.9	74.2	8.6	35.1	79.3	99.0	85.8	98.5	101.0
Workwear & Safetywear	100	135.0	134.8	82.4	119.4	127.7	139.1	37.7	66.6	98.2	131.7	98.4	111.1	125.2
Ironmongery	100	133.2	120.0	87.7	118.7	116.1	104.0	27.3	58.9	108.8	128.7	113.6	127.3	127.3
Landscaping	100	116.3	94.9	62.4	86.9	103.0	110.4	40.3	152.5	223.7	208.2	157.2	161.0	135.6
Plumbing, Heating & Electrical	100	140.7	133.7	95.9	126.3	124.8	104.3	25.4	51.8	84.4	103.1	95.3	115.4	126.0
Renewables & Water Saving	100	74.0	72.0	51.4	75.2	86.1	68.6	12.7	26.7	55.1	69.3	58.2	71.9	67.2
Kitchens & Bathrooms	100	127.6	125.4	85.4	109.1	117.5	101.7	14.1	43.7	87.3	111.1	106.3	117.3	119.3
Miscellaneous	100	131.8	122.0	90.8	119.9	114.7	152.6	36.7	55.1	98.0	112.4	98.2	122.3	120.8
Services	100	125.5	115.7	89.7	103.0	106.1	105.3	42.3	70.2	105.9	119.4	109.2	119.2	117.5

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

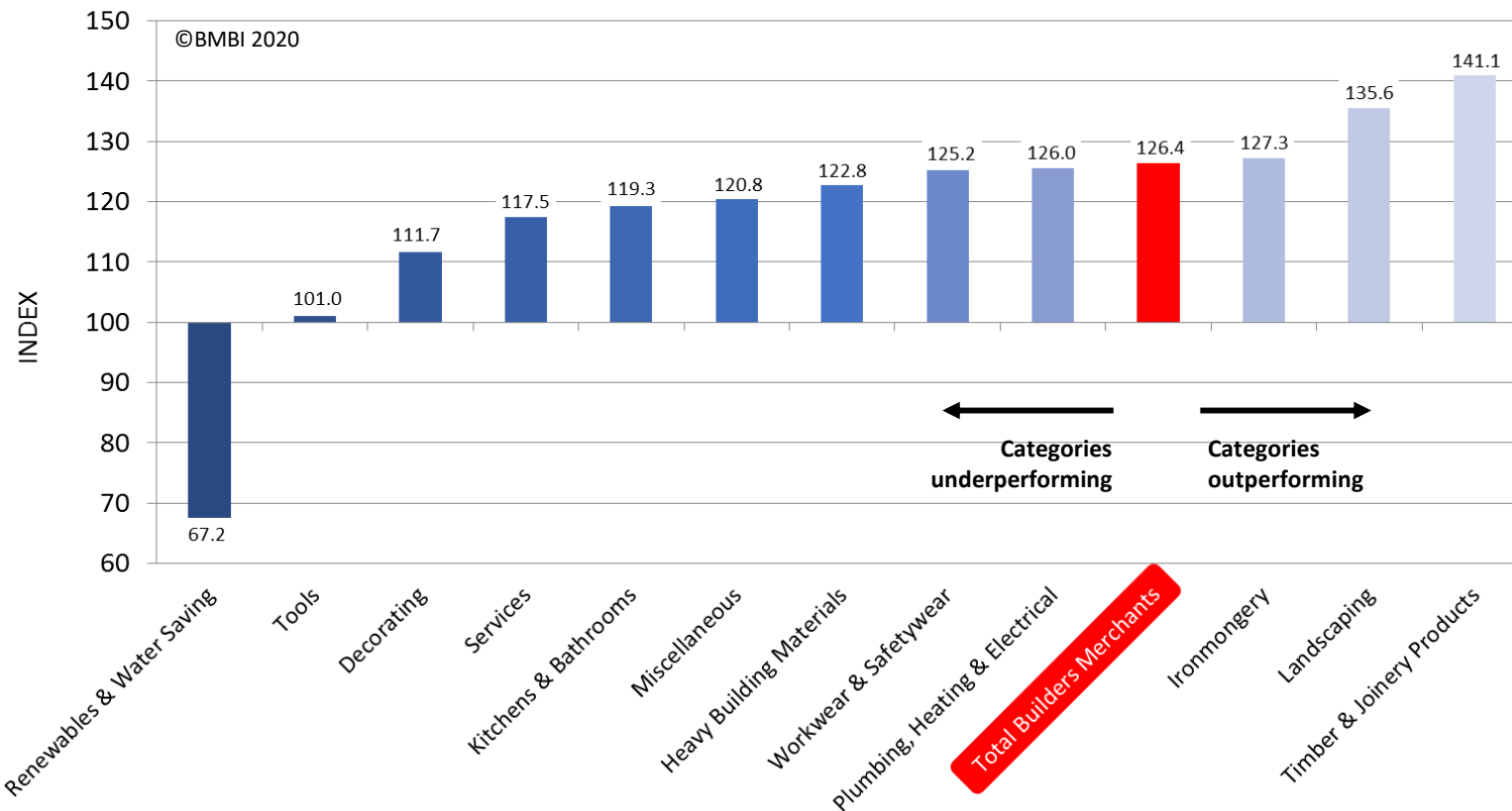
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# Monthly: Index and Categories

October 2020 index



## October 2020 Index



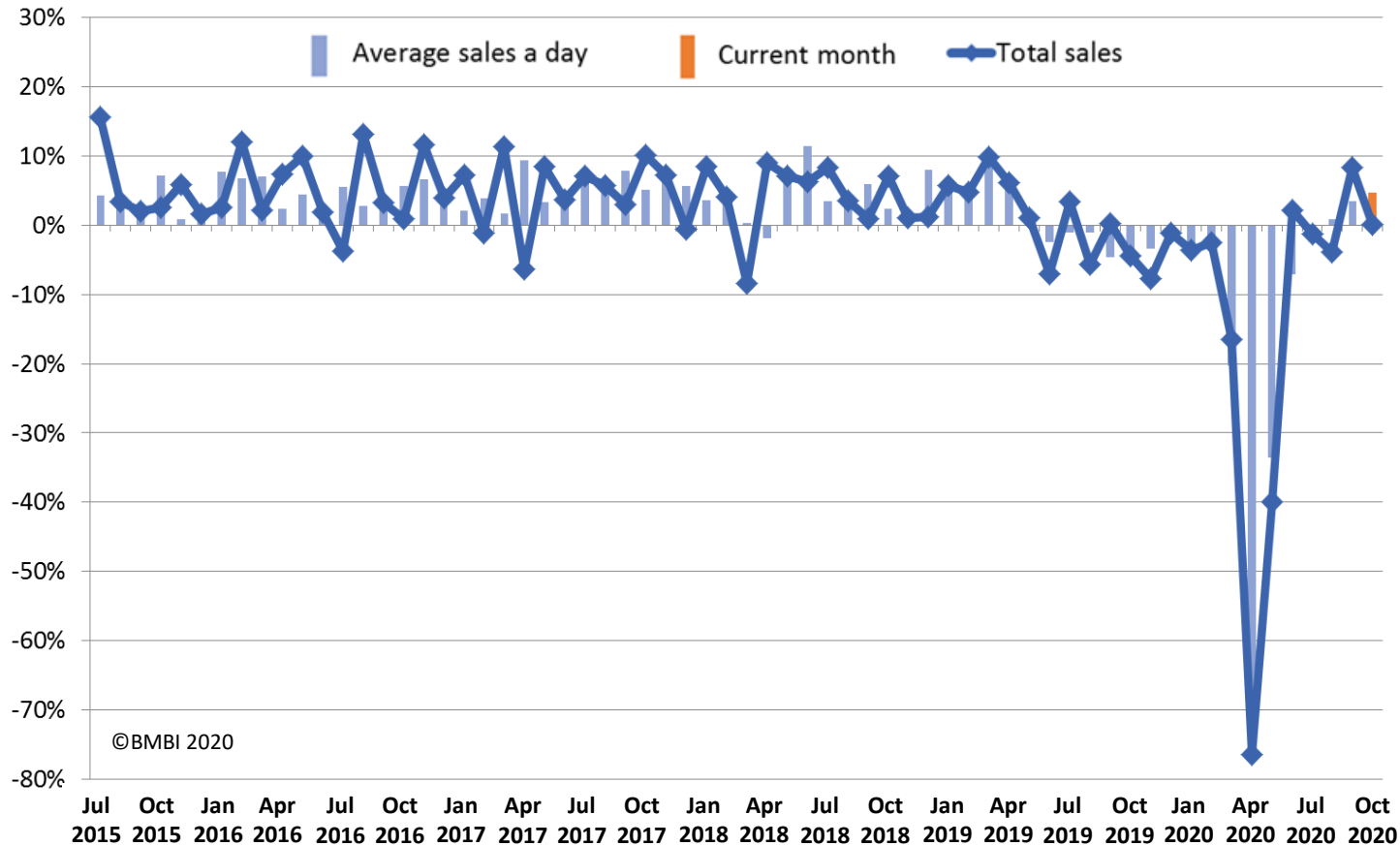
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



## Monthly: Year on Year



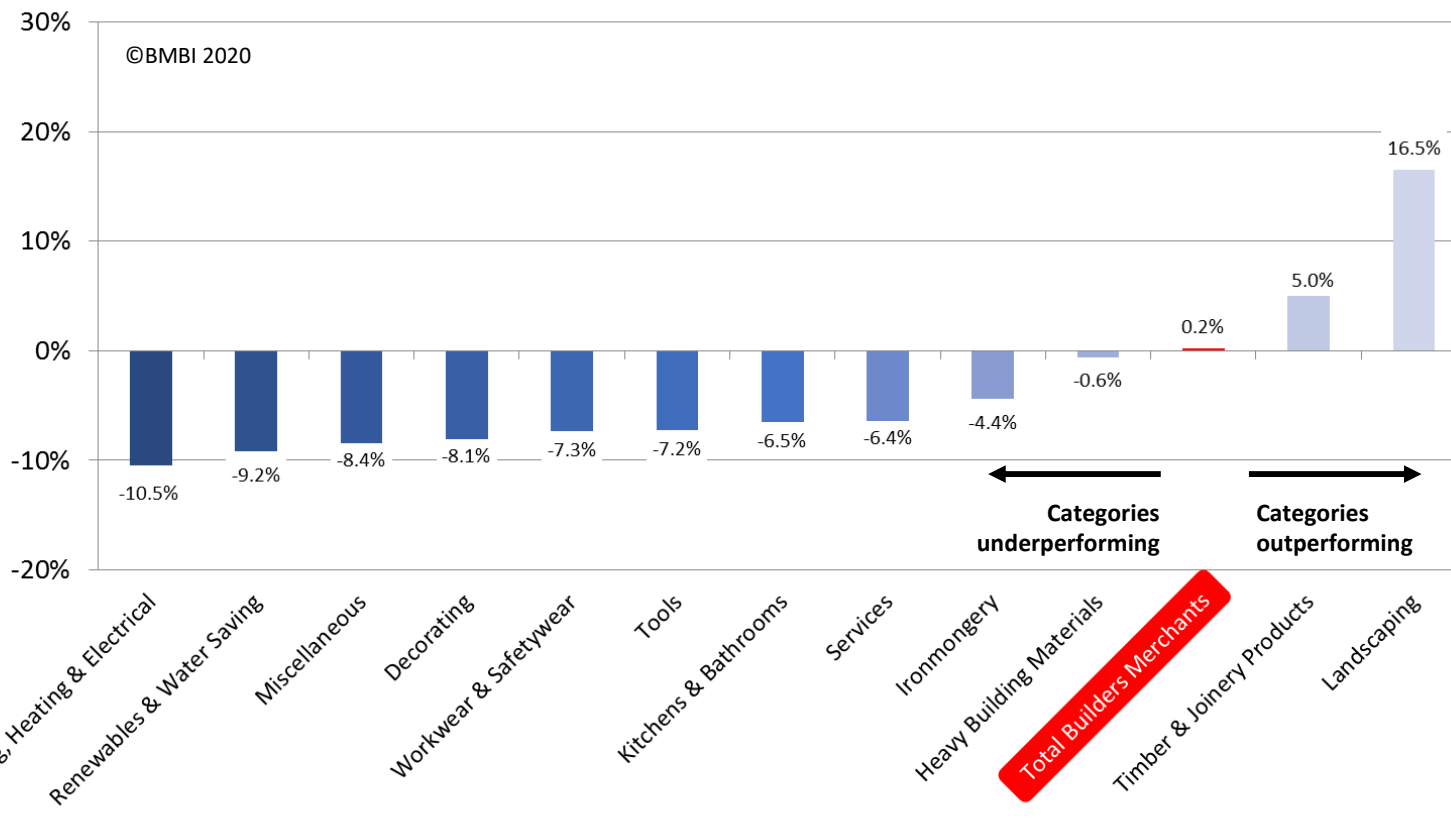
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# Monthly: This Year v Last Year

October 2020 sales indices



## October 2020 index v October 2019 index



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

# Monthly: This Year v Last Year

October 2020 average sales a day indices



## October 2020 index v October 2019 index



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

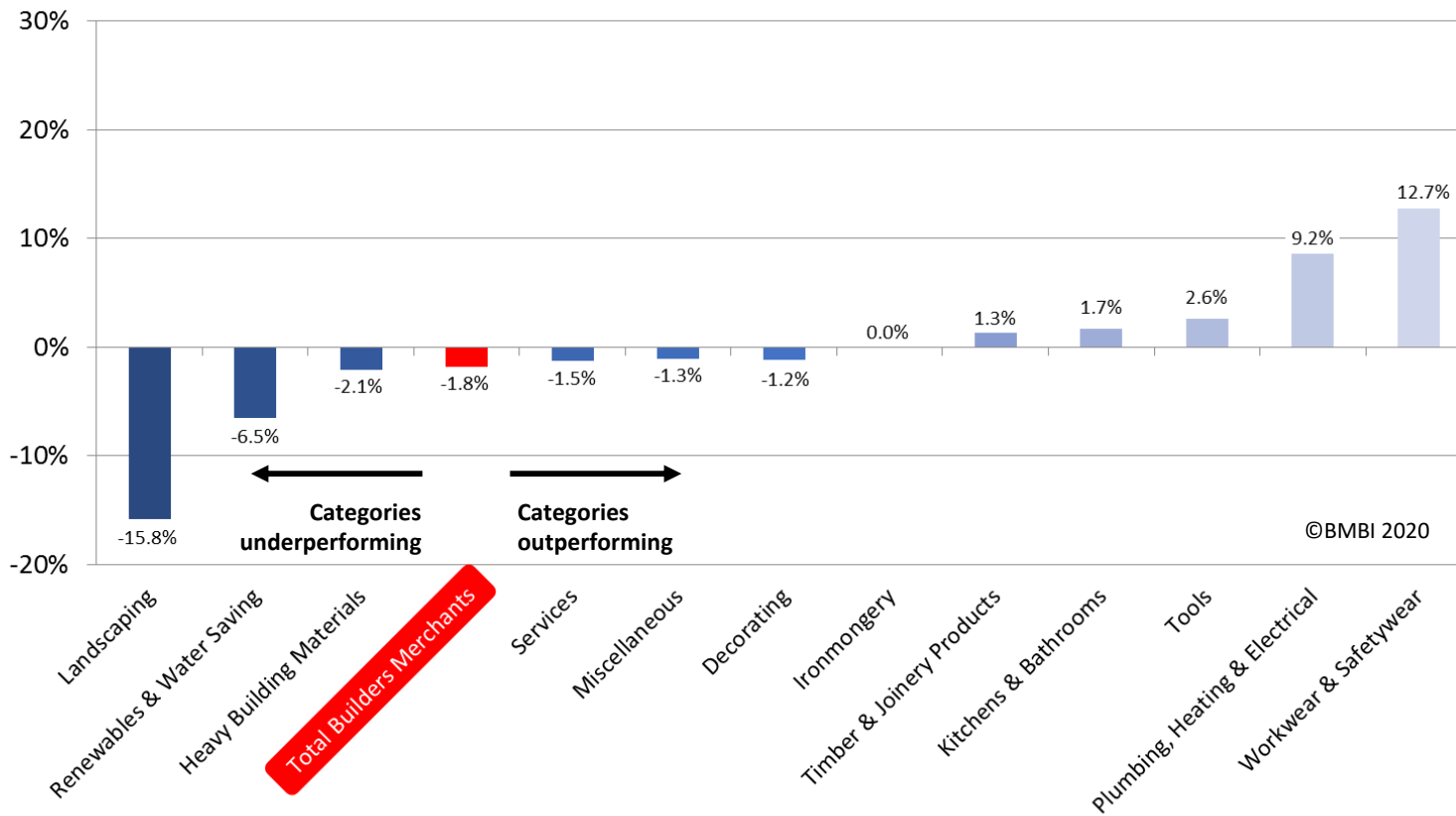


# Monthly: This Month v Last Month

October 2020 sales indices



## October 2020 v September 2020



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

# Quarterly: Index and Categories

Quarter 3 2019\* to Quarter 3 2020

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020
<b>Total Builders Merchants</b>	<b>100</b>	<b>123.4</b>	<b>105.4</b>	<b>104.9</b>	<b>76.4</b>	<b>124.6</b>
Timber & Joinery Products	100	128.9	111.3	108.5	78.0	133.4
Heavy Building Materials	100	121.0	102.3	102.5	75.1	119.9
Decorating	100	115.7	104.7	101.1	56.3	108.5
Tools	100	98.5	92.2	86.0	41.0	94.4
Workwear & Safetywear	100	105.3	117.4	128.7	67.5	113.7
Ironmongery	100	126.1	113.6	112.9	65.0	123.2
Landscaping	100	141.3	91.2	100.1	138.8	175.5
Plumbing, Heating & Electrical	100	118.7	123.4	118.5	53.9	104.6
Renewables & Water Saving	100	75.3	65.8	76.6	31.5	66.4
Kitchens & Bathrooms	100	120.2	112.8	109.4	48.4	111.6
Miscellaneous	100	128.0	114.9	129.1	63.3	111.0
Services	100	121.8	110.3	104.8	72.8	115.9

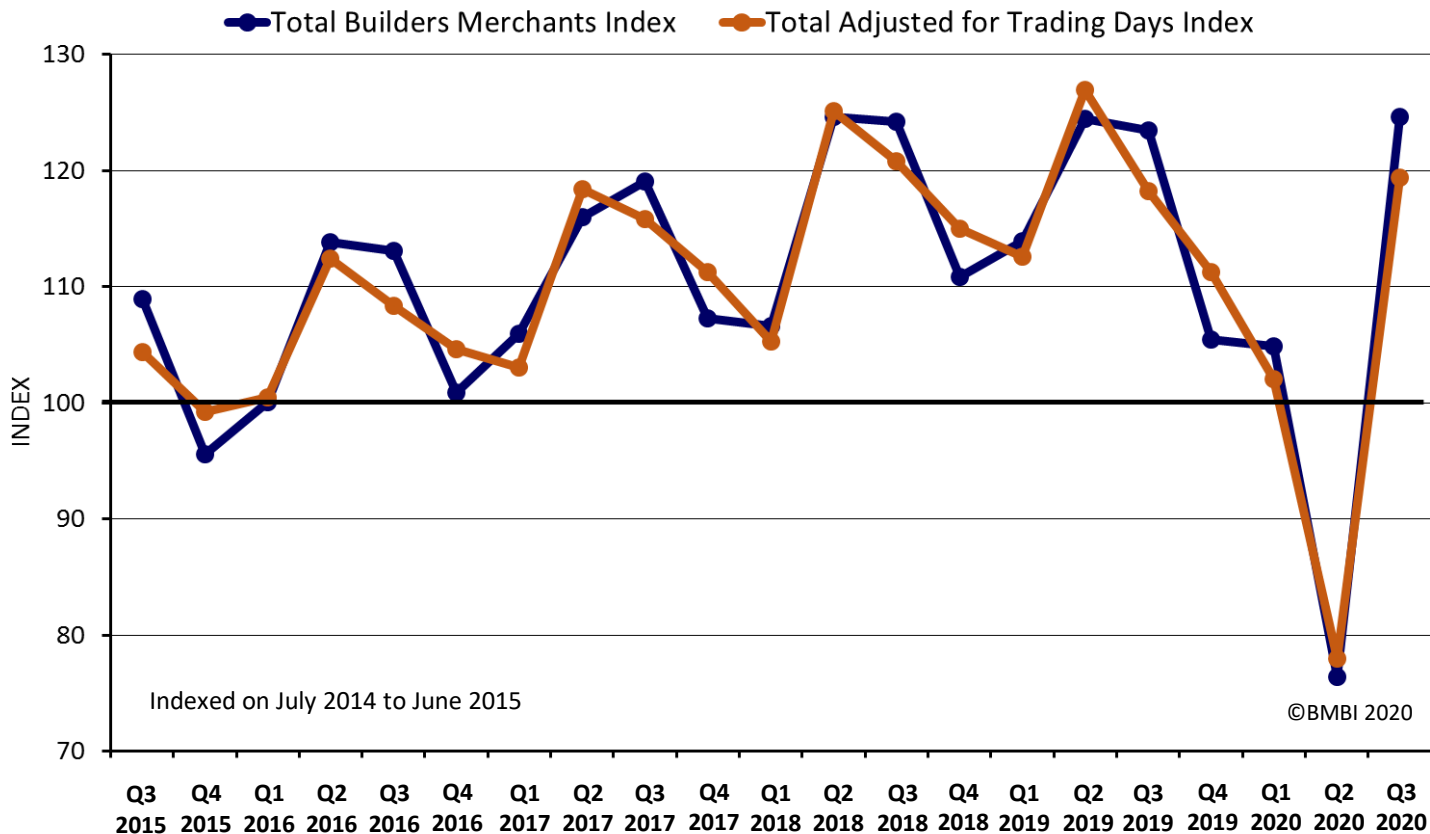
\*Click the web link below to see the complete series of quarterly indices from Q2, 2015.


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

# Quarterly: Index

Adjusted and unadjusted for trading days

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



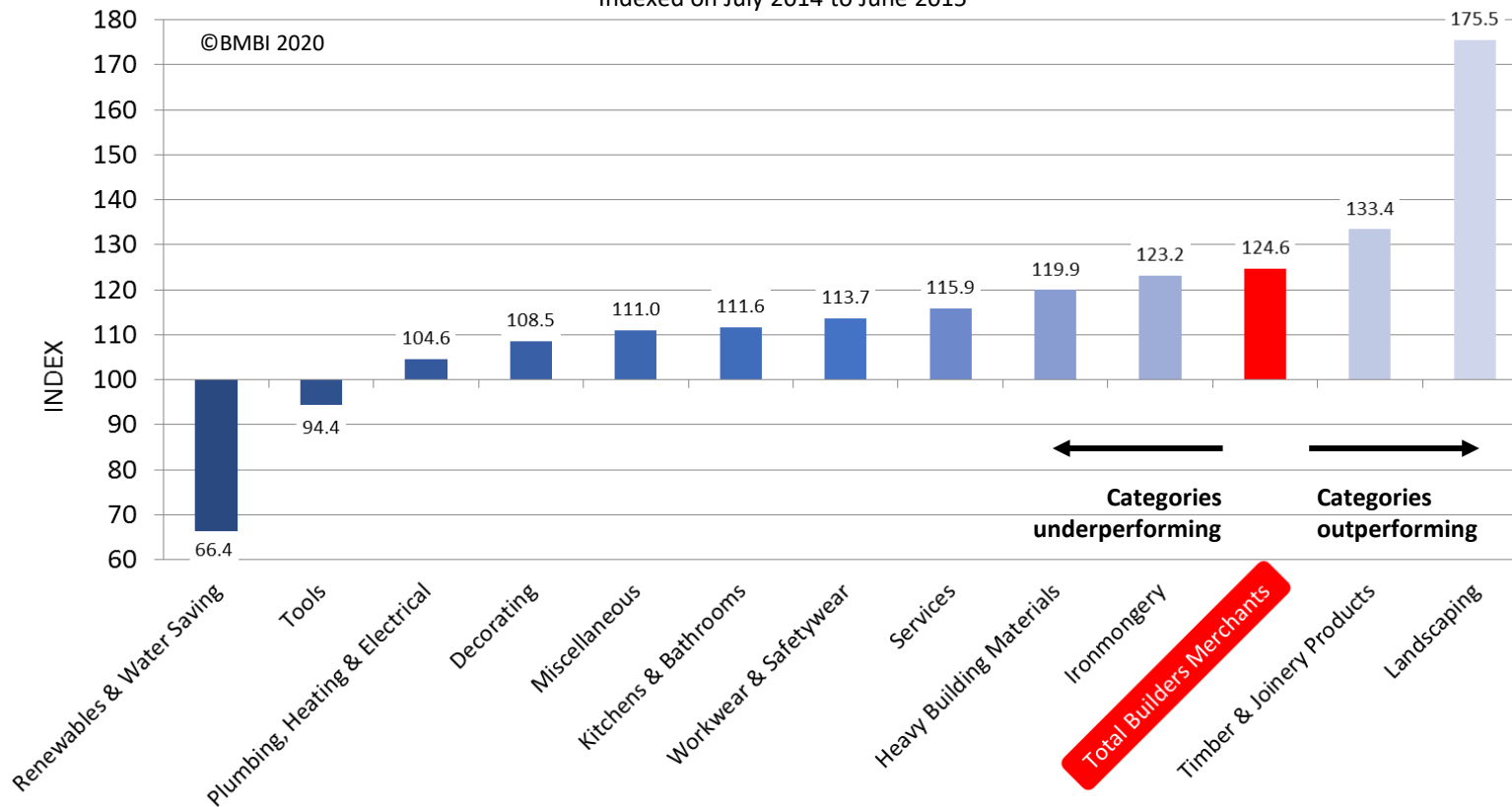
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2020

# Quarterly: Index and Categories

Q3 2020 index

## Quarter 3 2020

Indexed on July 2014 to June 2015



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

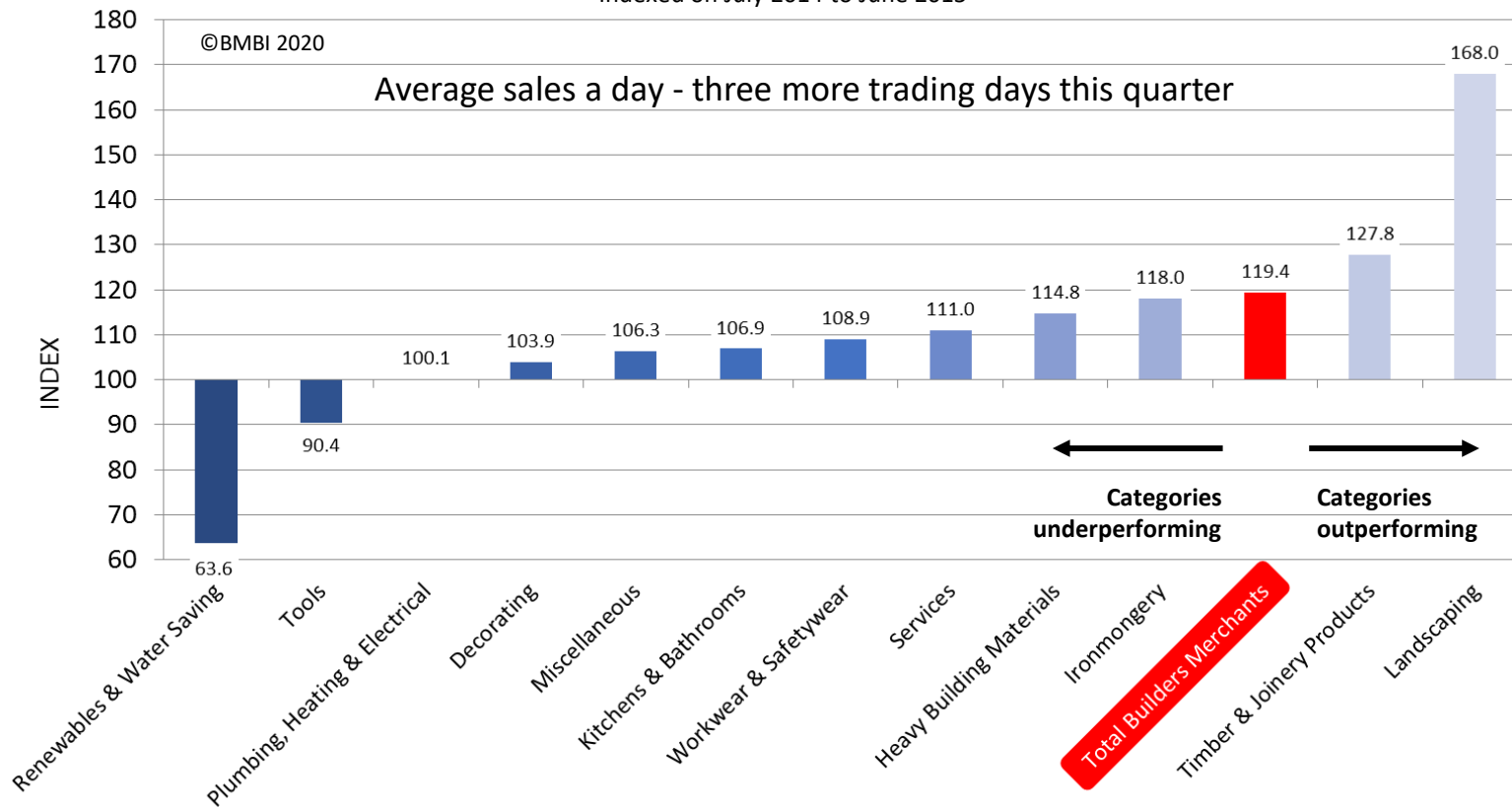
# Quarterly: Index and Categories

Q3 2020 average sales a day index



## Quarter 3 2020

Indexed on July 2014 to June 2015



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

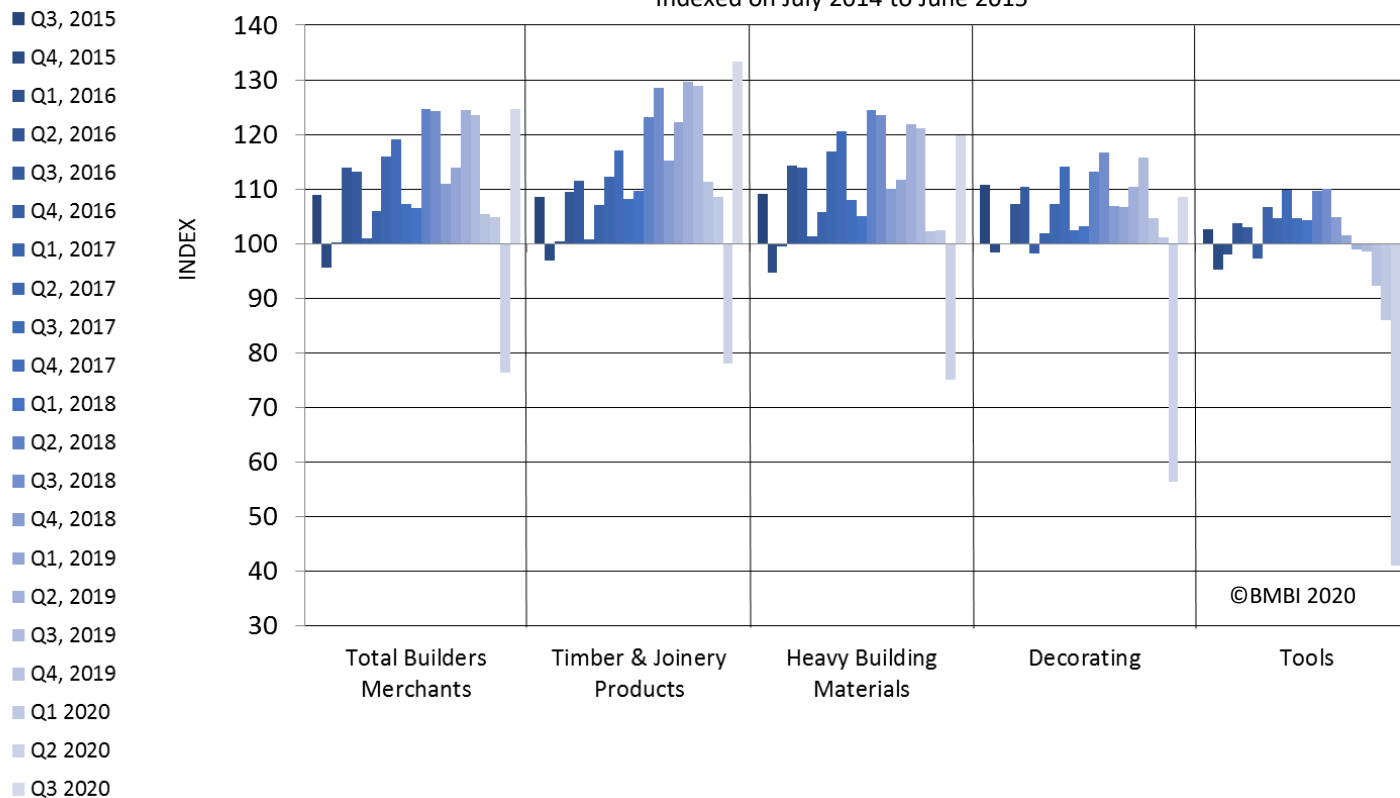
# Quarterly: Index and Categories

Quarterly indices



## Quarterly Indices Q3 2015 to Q3 2020

Indexed on July 2014 to June 2015



©BMBI 2020

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

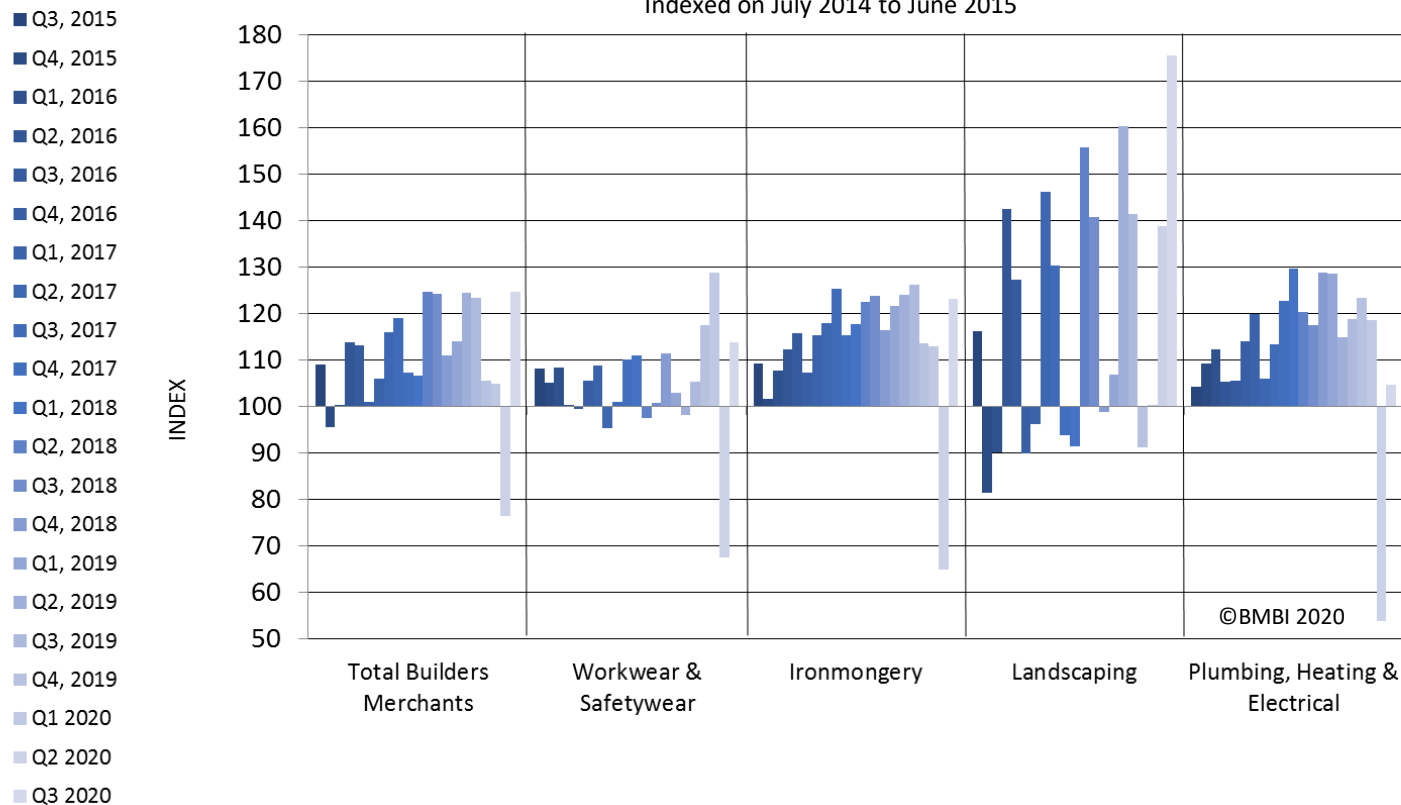
# Quarterly: Index and Categories

Quarterly indices



## Quarterly Indices Q3 2015 to Q3 2020

Indexed on July 2014 to June 2015



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

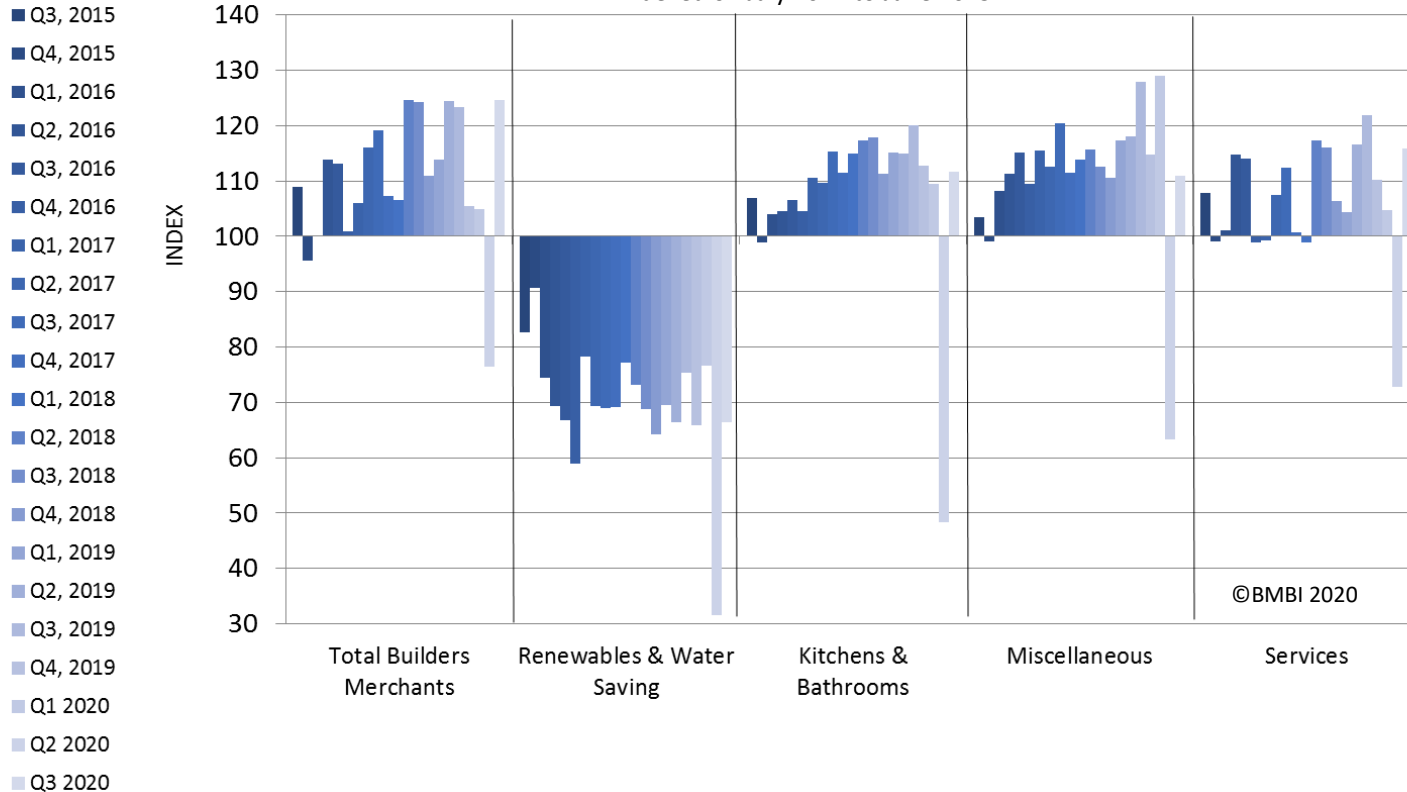
# Quarterly: Index and Categories

Quarterly indices



## Quarterly Indices Q3 2015 to Q3 2020

Indexed on July 2014 to June 2015



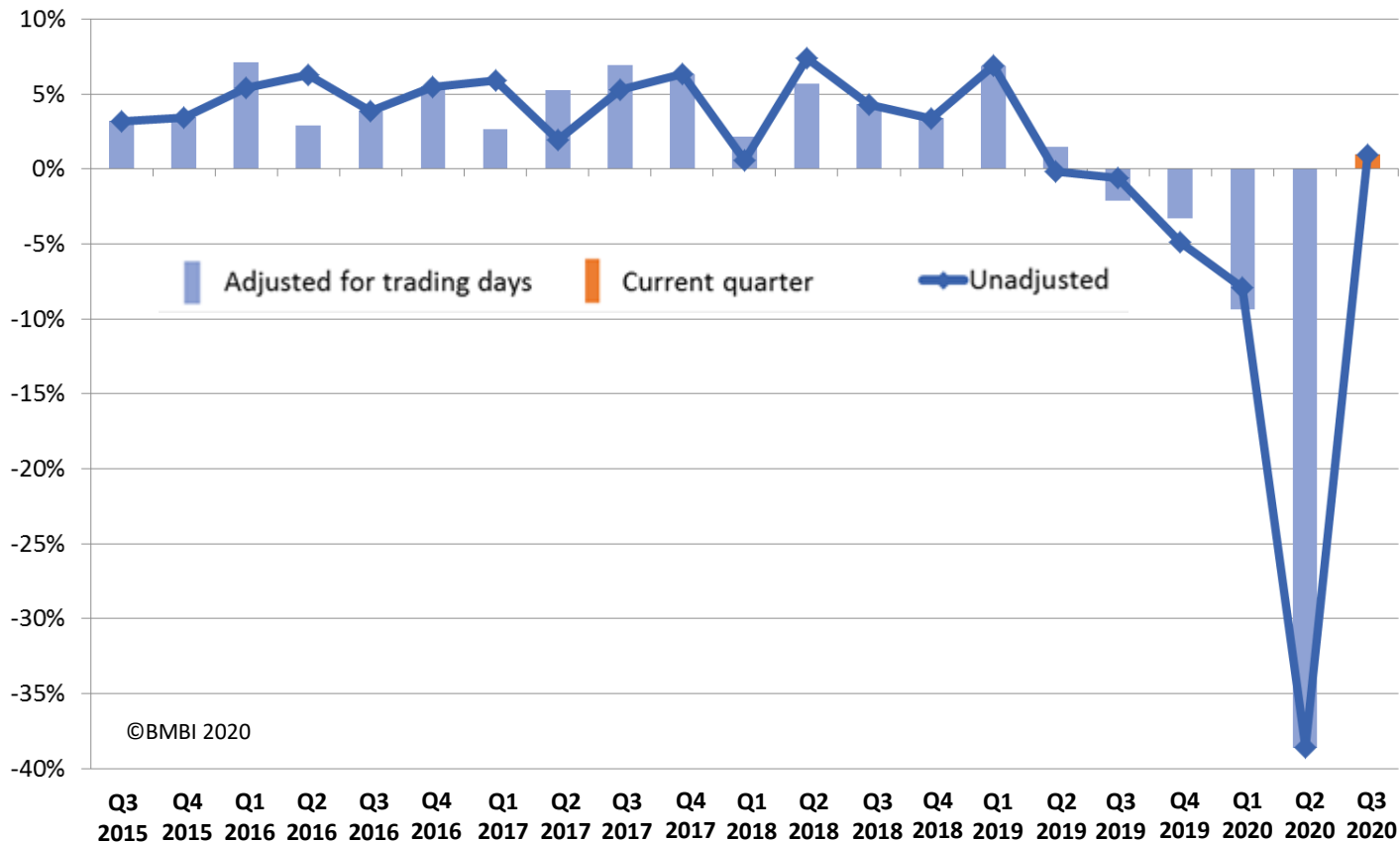
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2020



# Quarterly: Sales Indices

Adjusted and unadjusted for trading days

## Quarterly Indices: Year on Year



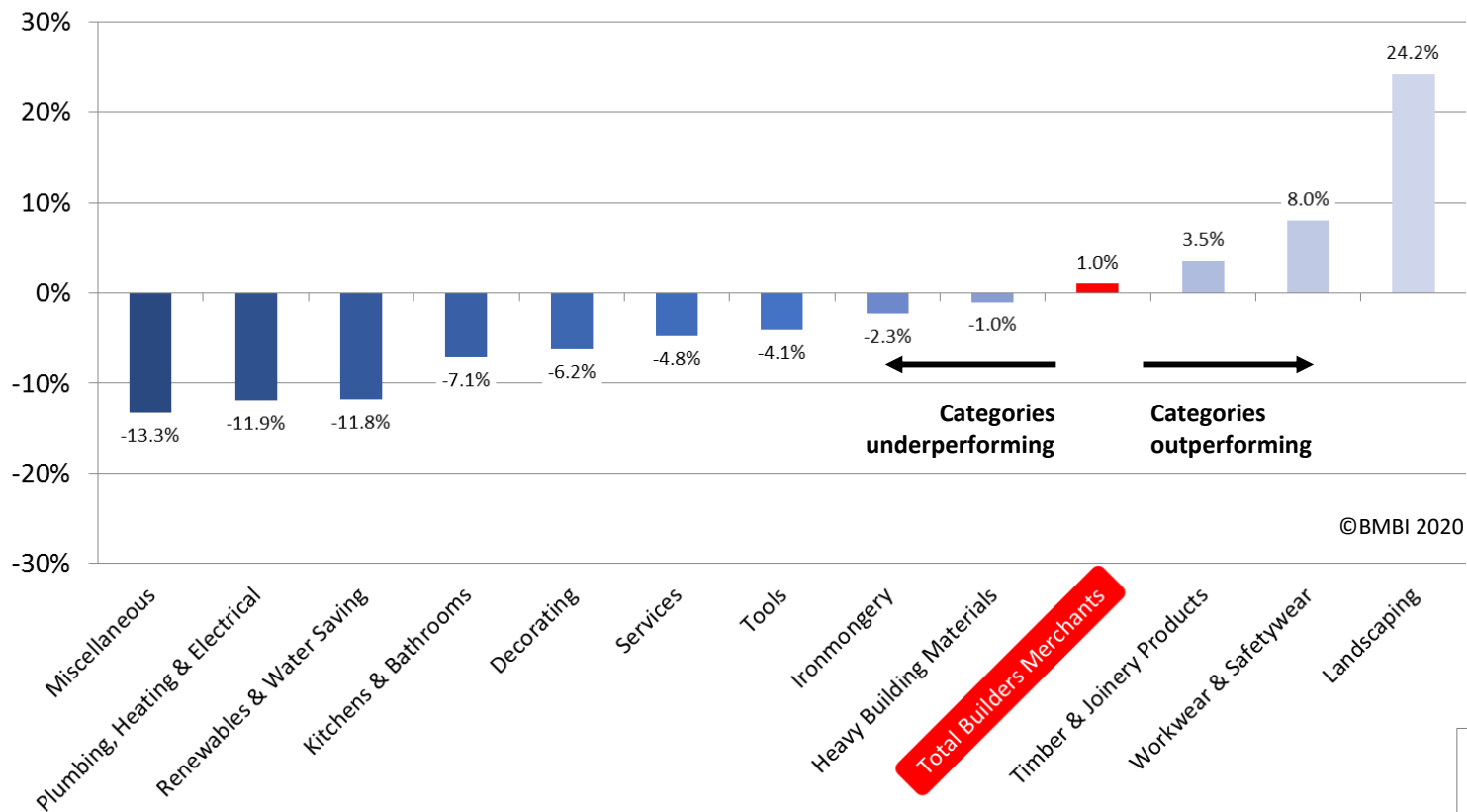
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2020

# Quarterly: This Year v Last Year

Q3 2020 sales indices



## Quarter 3 2020 index v Quarter 3 2019 index



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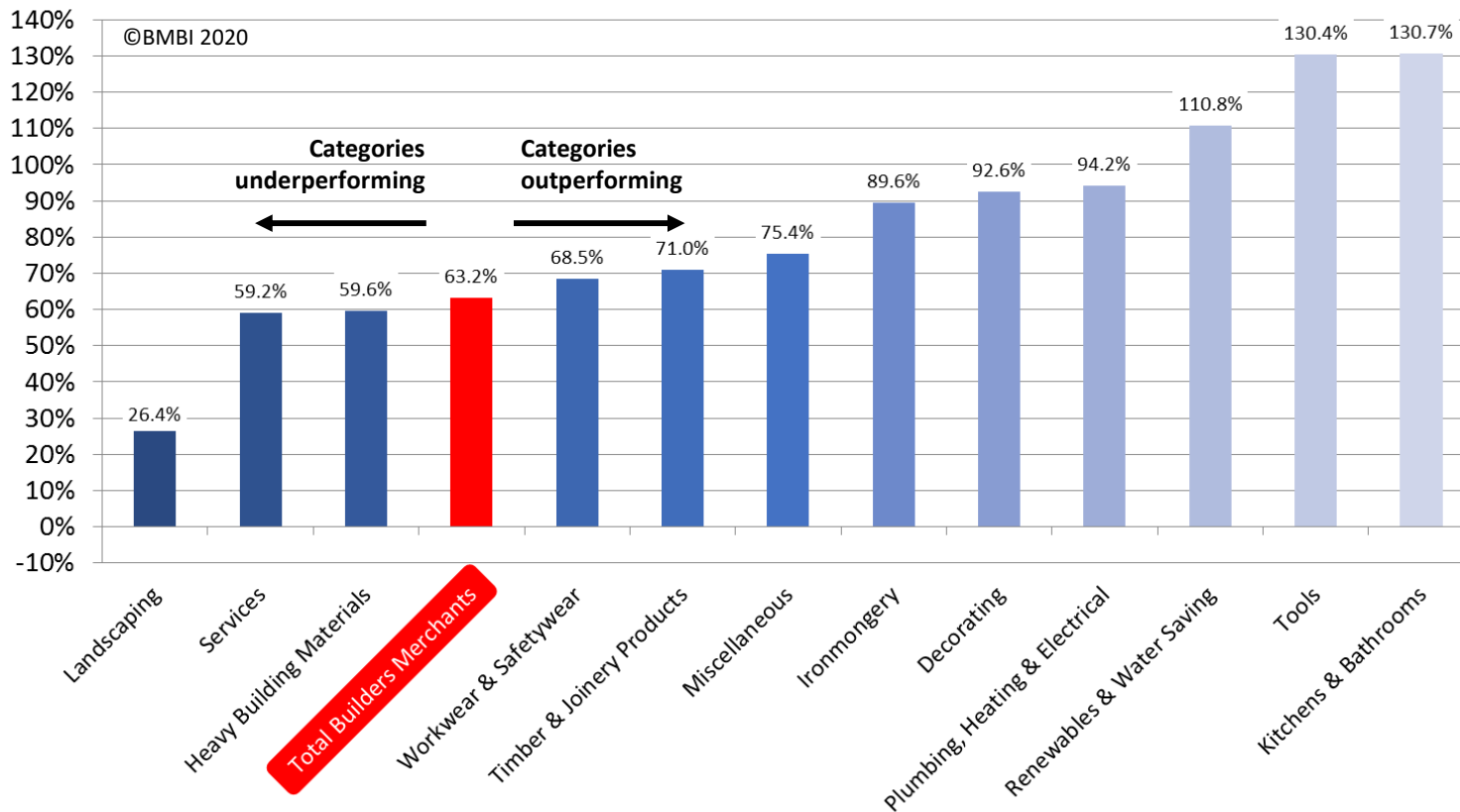
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2020

# Quarterly: Quarter on Quarter

Q3 2020 sales indices



## Quarter 3 2020 index v Quarter 2 2020 index



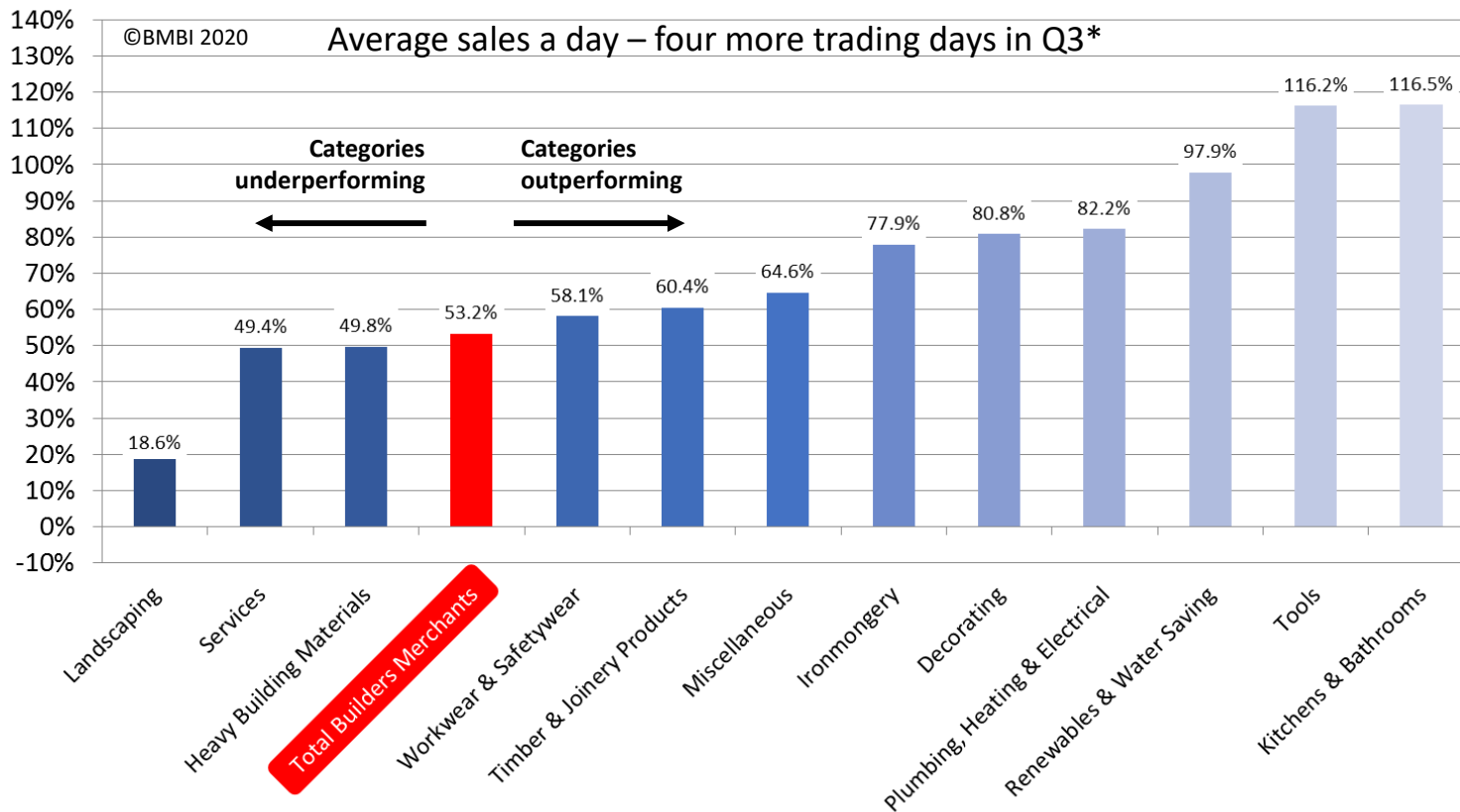
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2020

# Quarterly: Quarter on Quarter

Q3 2020 average sales a day indices



## Quarter 3 2020 index v Quarter 2 2020 index



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

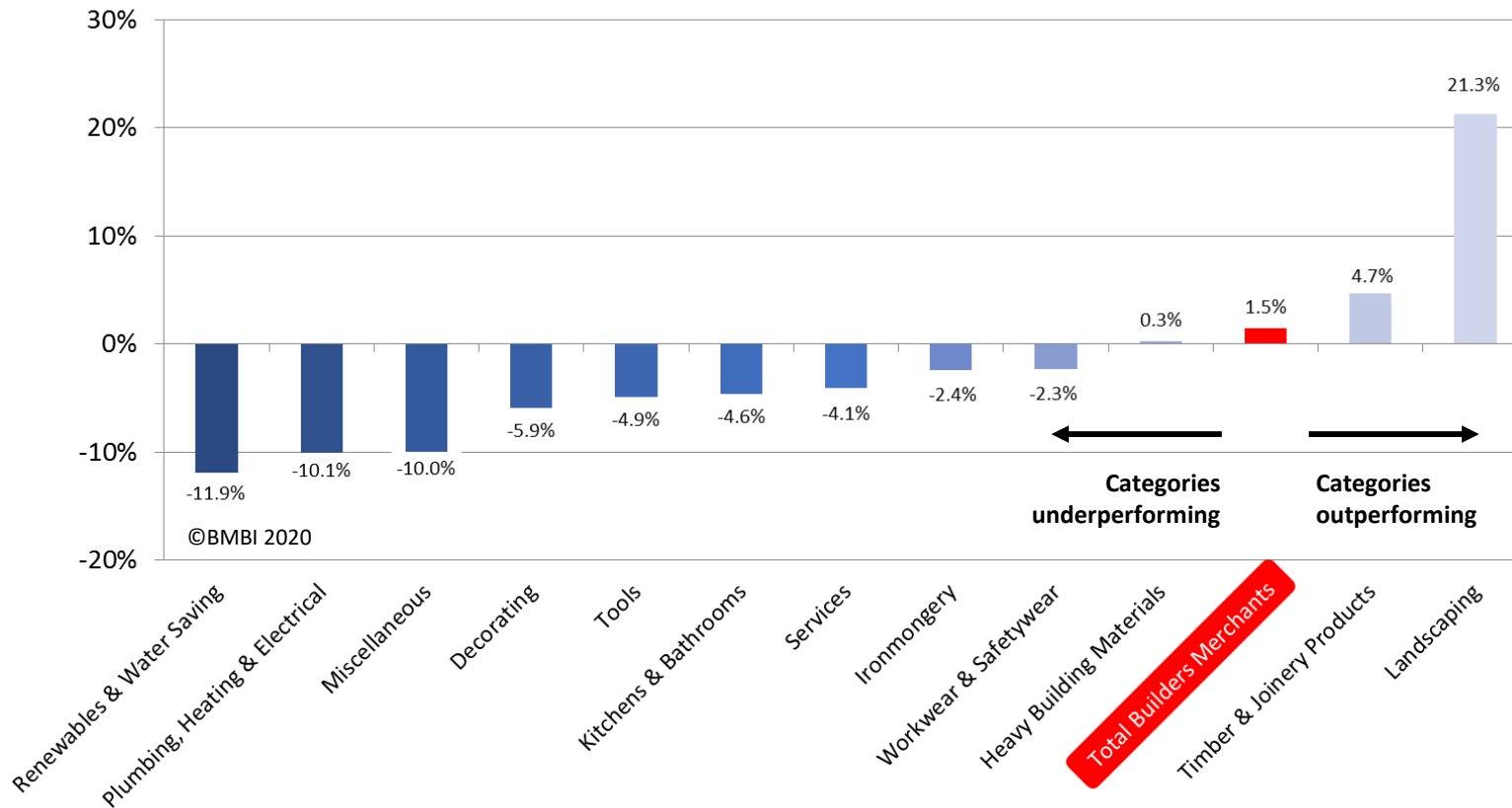
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Latest 3 months: Year on Year

August to October sales indices



## 3 months Aug 20 to Oct 20 v 3 months Aug 19 to Oct 19



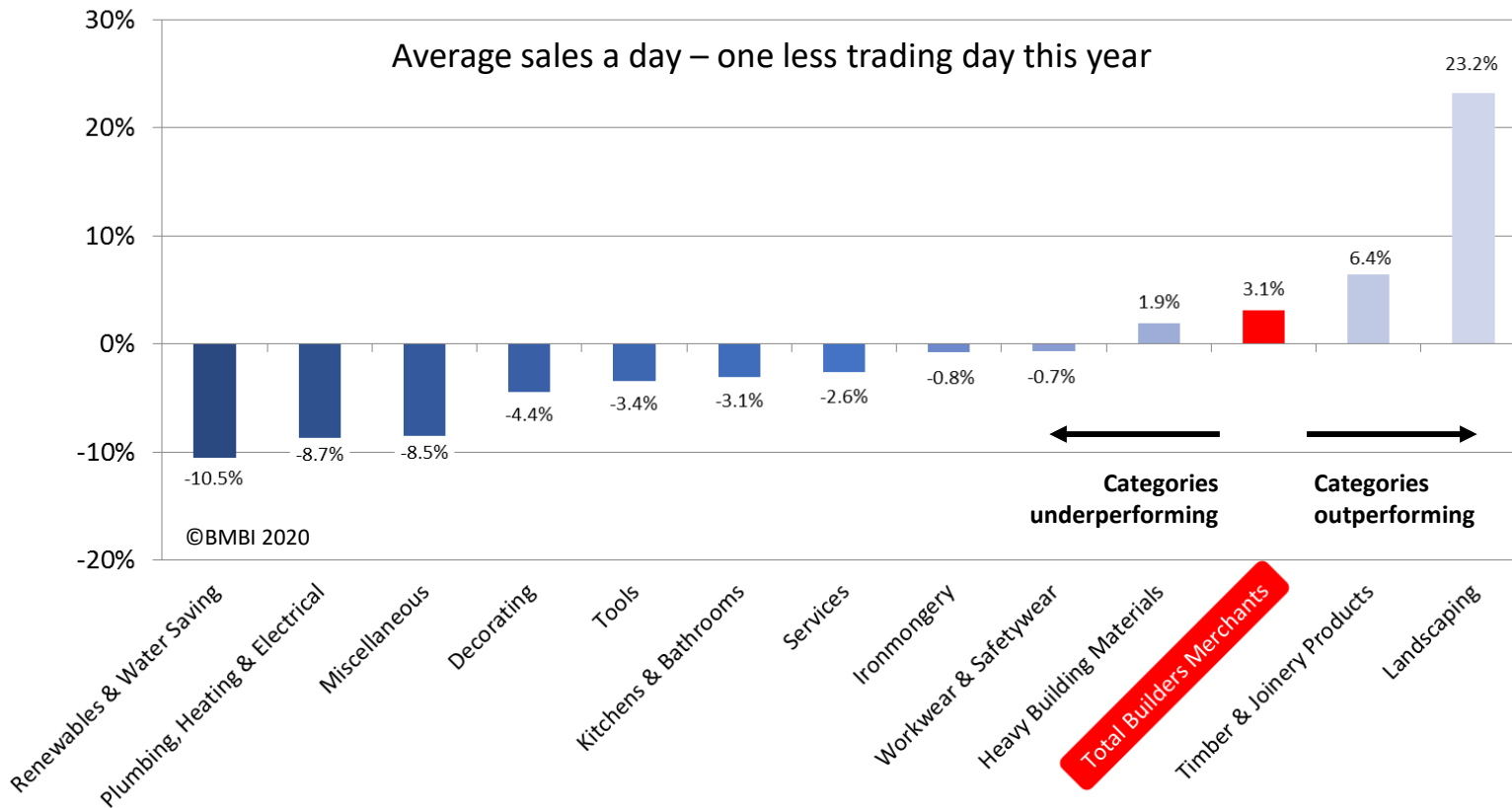
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# Latest 3 months: Year on Year

August to October average sales a day indices



## 3 months Aug 20 to Oct 20 v 3 months Aug 19 to Oct 19

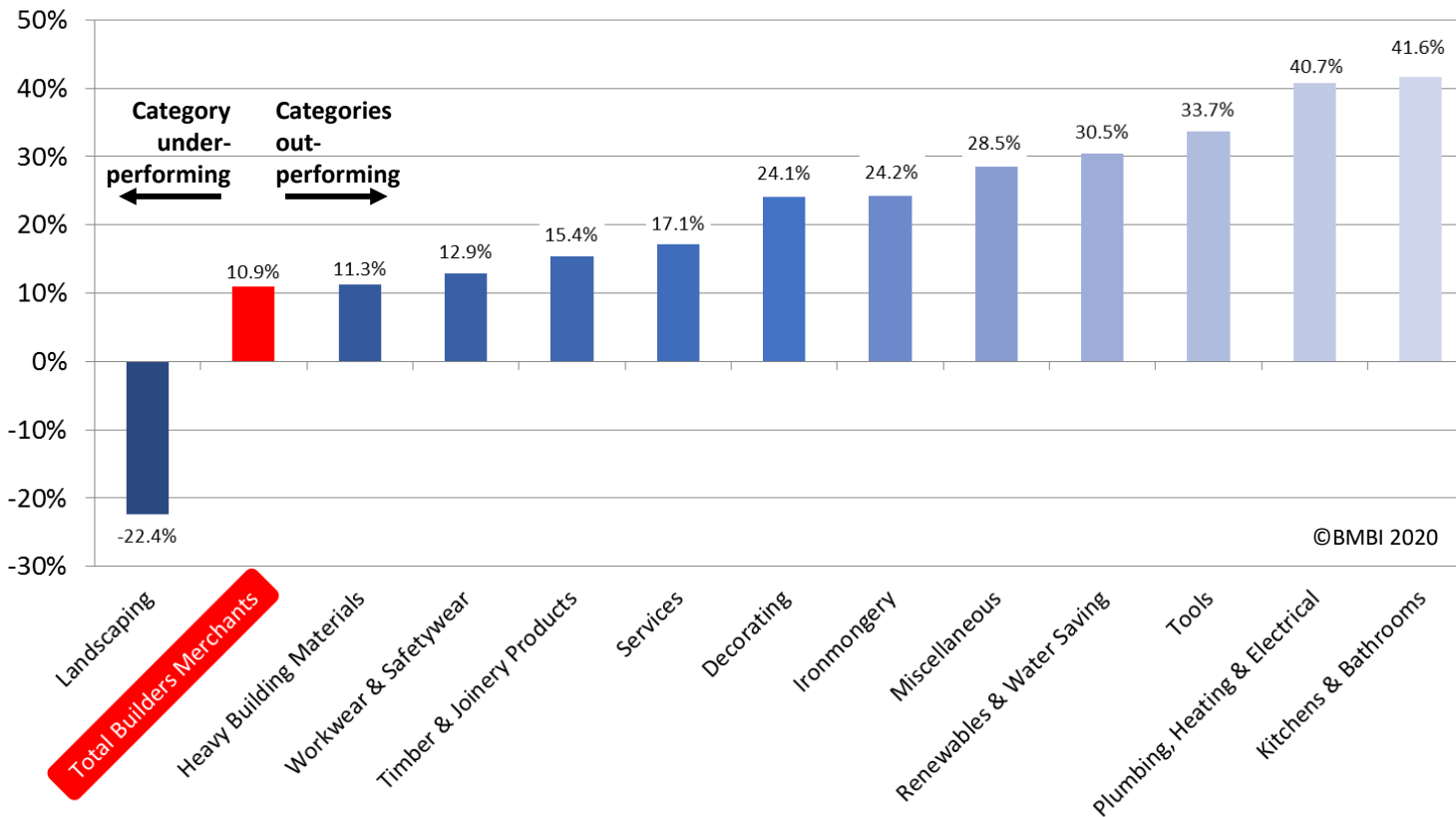


Source: GfK's Builders Merchants Total Category Report July 2015 to October 2020

# Latest 3 months: previous 3 months

August to October sales indices

## 3 months Aug 20 to Oct 20 v 3 months May 20 to Jul 20



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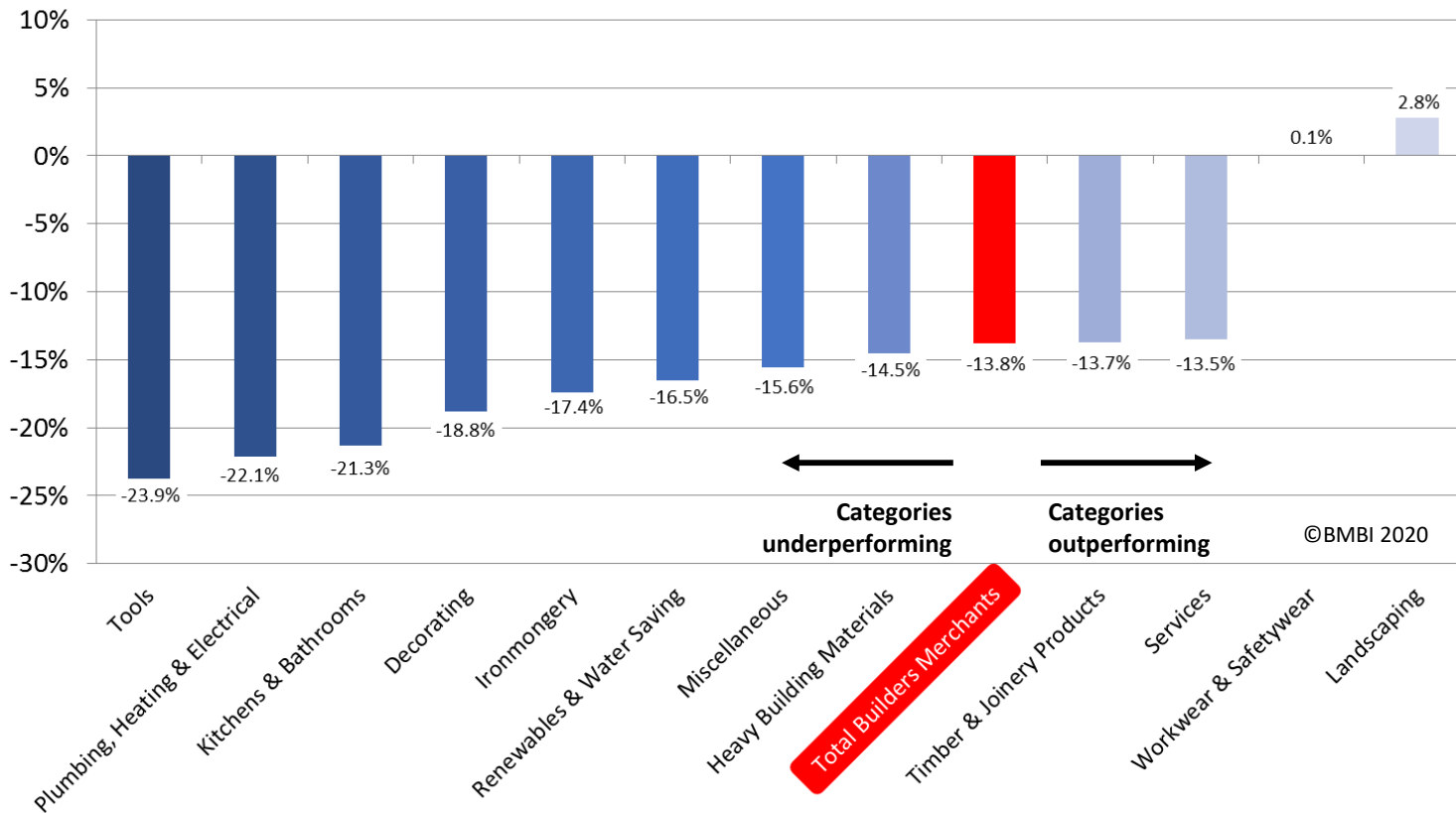
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# Year to date: Year on Year

Last 10 months sales indices



## Year to date: Jan 20 to Oct 20 index v Jan 19 to Oct 19 index



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

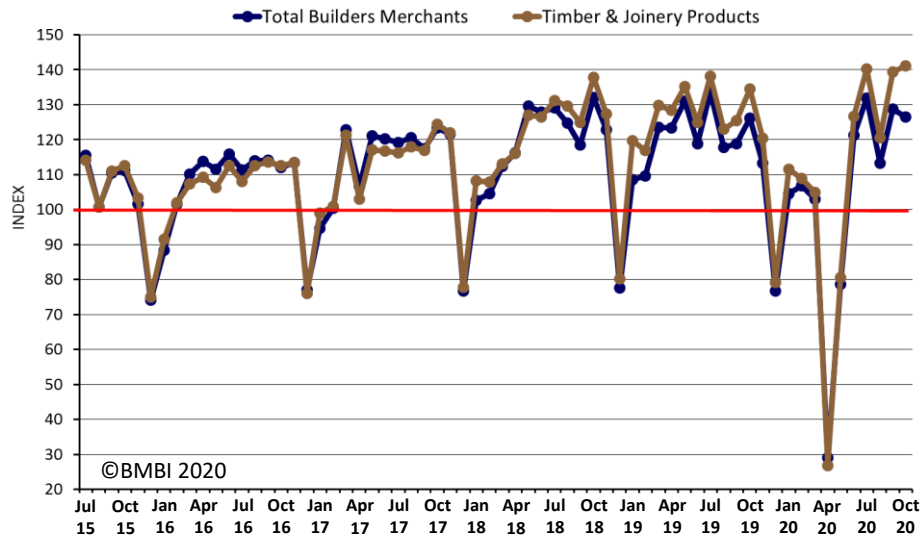


# Monthly: Indices

October 2020

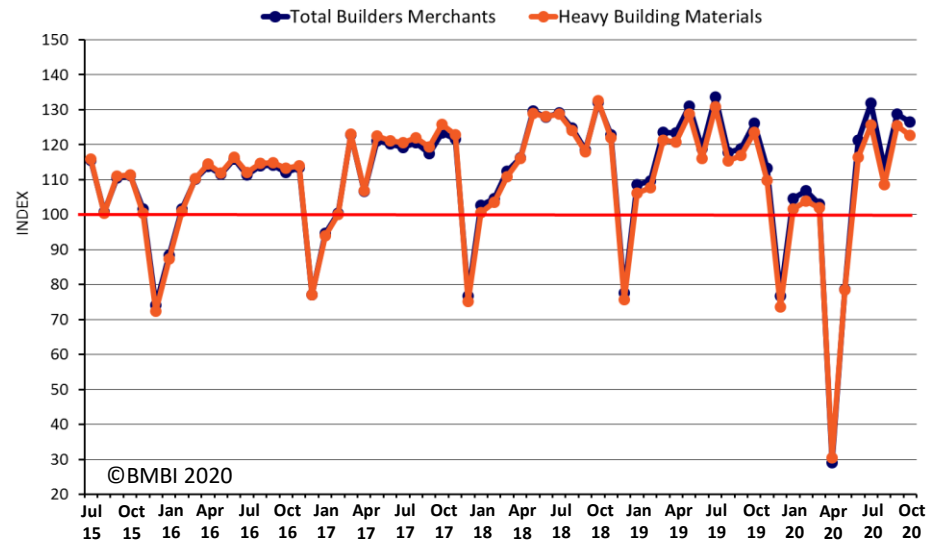


## Timber & Joinery Products



Indexed on July 2014 – June 2015

## Heavy Building Materials



Indexed on July 2014 – June 2015

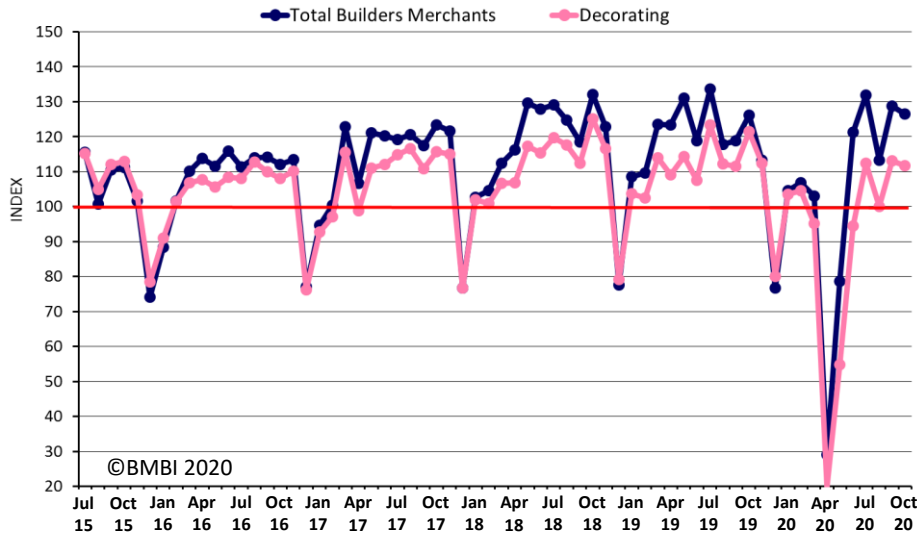
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# Monthly: Indices

October 2020

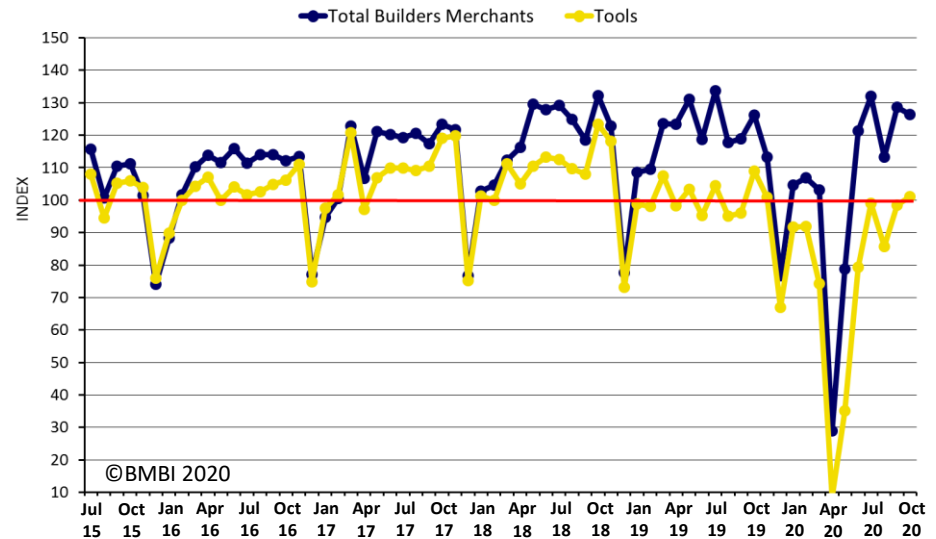


## Decorating



Indexed on July 2014 – June 2015

## Tools



Indexed on July 2014 – June 2015

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

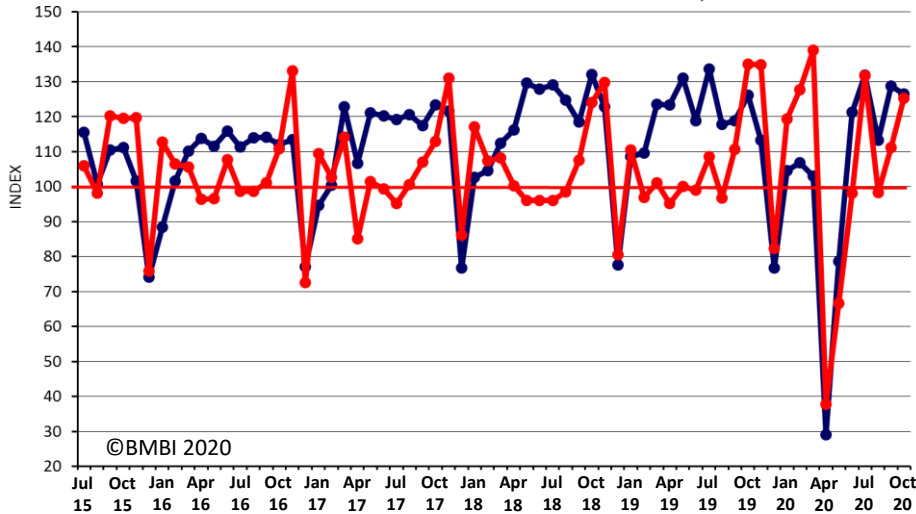
# Monthly: Indices

October 2020



## Workwear & Safetywear

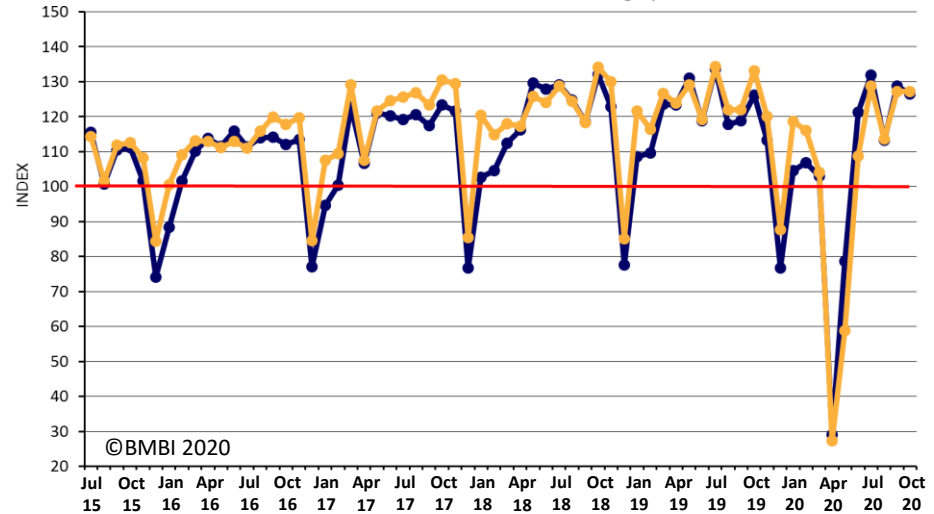
— Total Builders Merchants — Workwear & Safetywear




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 October 2020

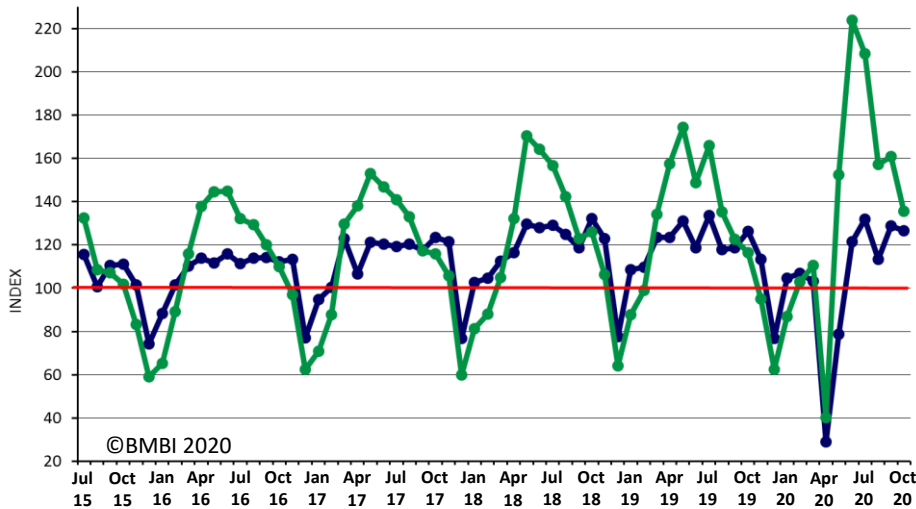
# Monthly: Indices

October 2020



## Landscaping

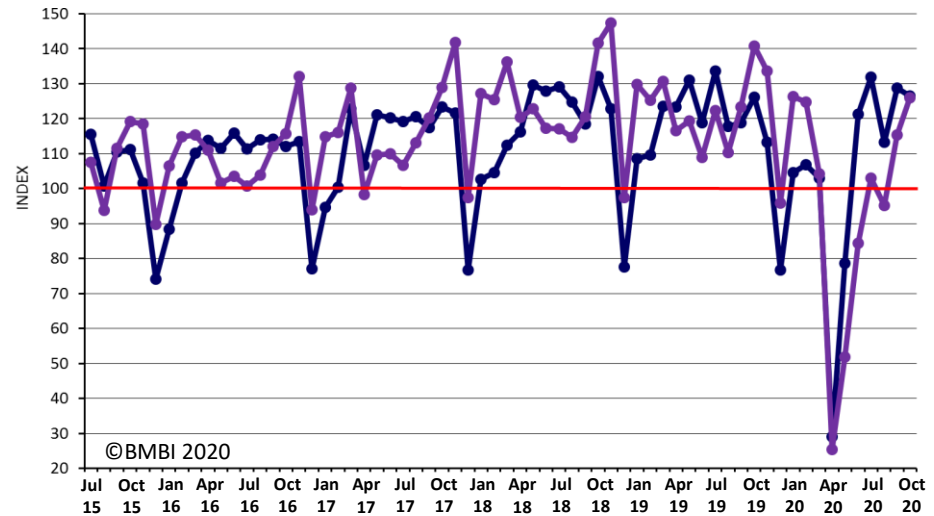
◆ Total Builders Merchants    ◆ Landscaping



Indexed on July 2014 – June 2015

## Plumbing, Heating & Electrical

◆ Total Builders Merchants    ◆ Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

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

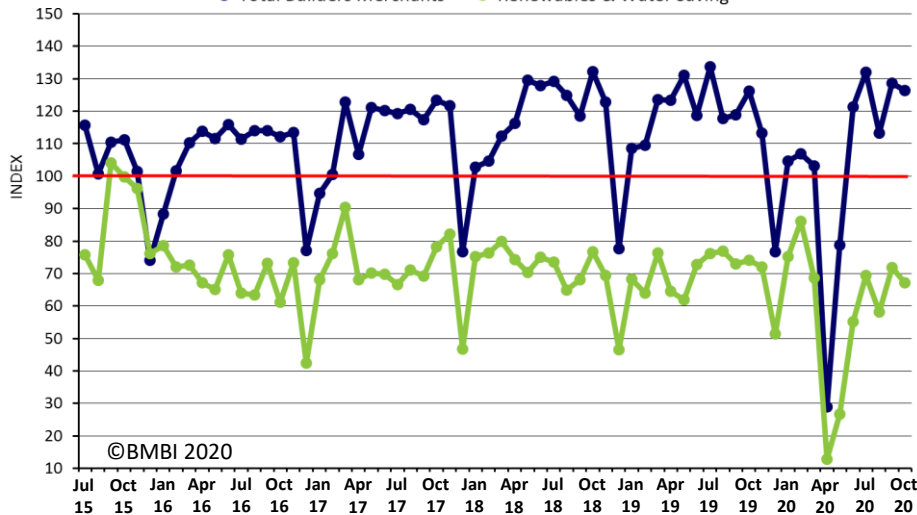
# Monthly: Indices

October 2020



## Renewables & Water Saving

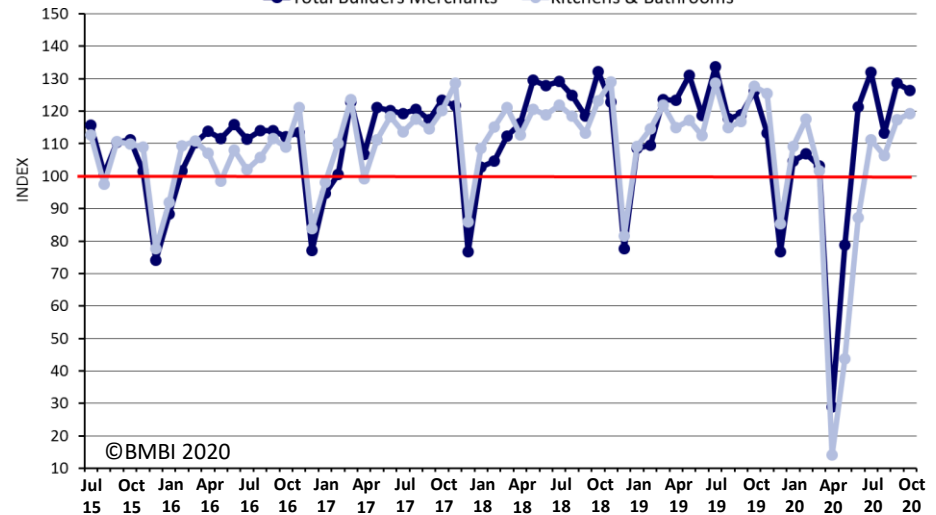
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

## Kitchens & Bathrooms

● Total Builders Merchants ● Kitchens & Bathrooms



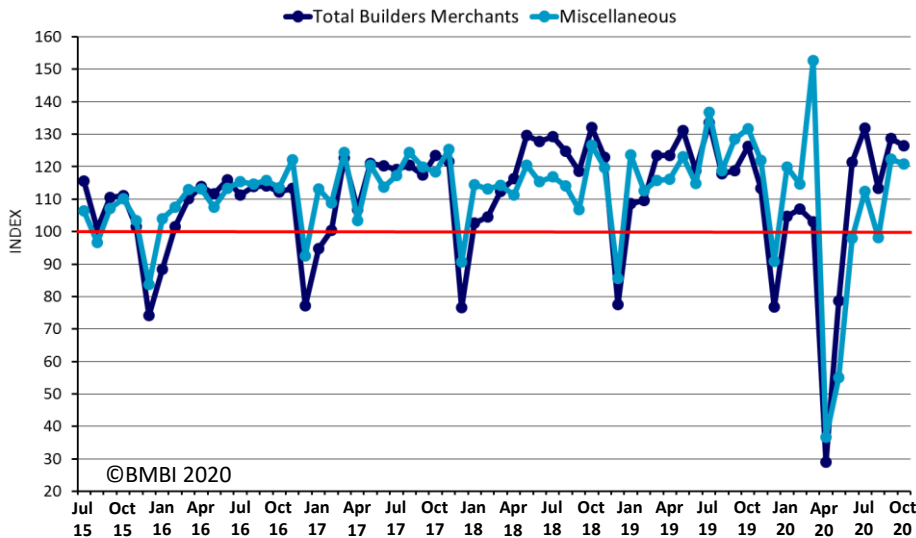
Indexed on July 2014 – June 2015

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

# Monthly: Indices

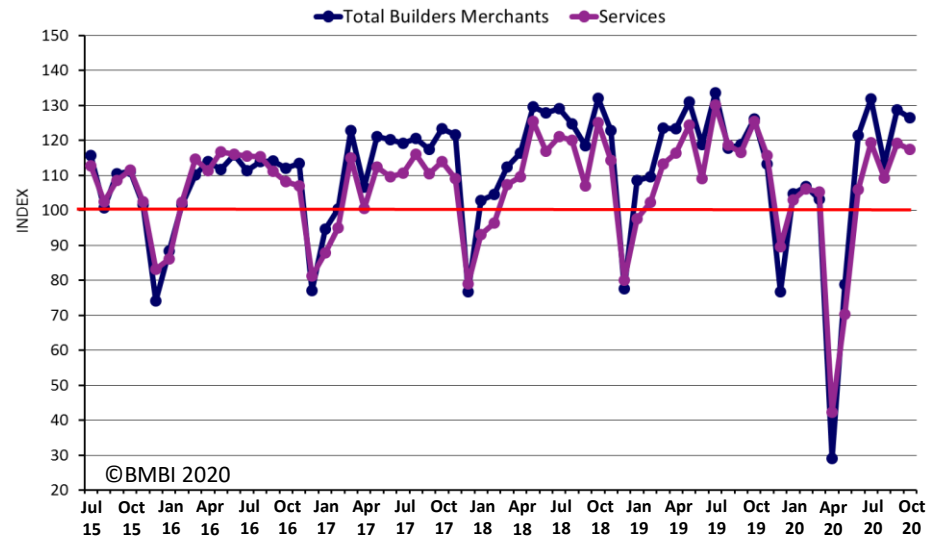
## October 2020

### 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 22	*Apr 20	*May 19	Jun 22	Jul 23	Aug 20	Sep 22	Oct 22	Nov	Dec

## Quarterly

Index: 62.3

2015				2015		2016	
		Q3 64	Q4 60		H2 124		
2016				2016		2016	
Q1 62	Q2 63	Q3 65	Q4 60	H1 125	H2 125	250	
2017				2017		2017	
Q1 64	Q2 61	Q3 64	Q4 60	H1 125	H2 124	249	
2018				2018		2018	
Q1 63	Q2 62	Q3 64	Q4 60	H1 125	H2 124	249	
2019				2019		2019	
Q1 63	Q2 61	Q3 65	Q4 59	H1 124	H2 124	248	
2020				2020		2020	
Q1 64	Q2 61	Q3 65	Q4	H1 125	H2		

\*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.

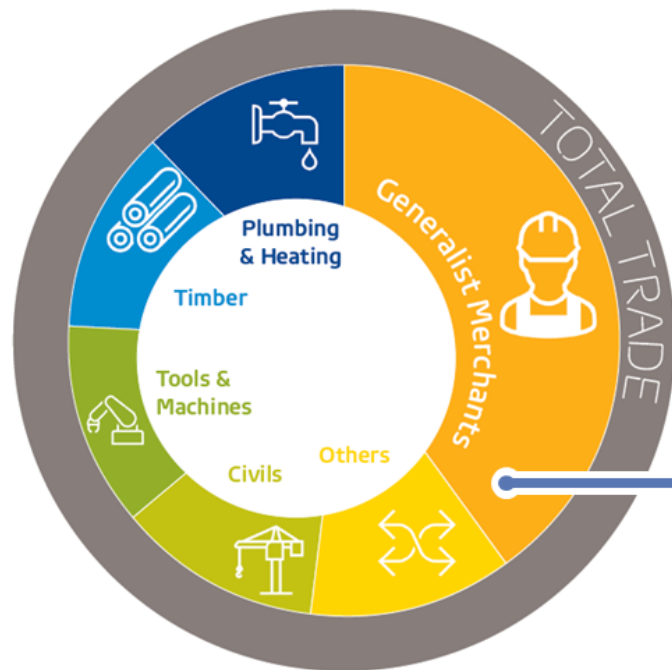
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2020

# GfK's Panel

## Generalist Builders Merchant Panel (GBM's)



We define the Builders Merchants channel as the following:



### Generalist Builders Merchants definition

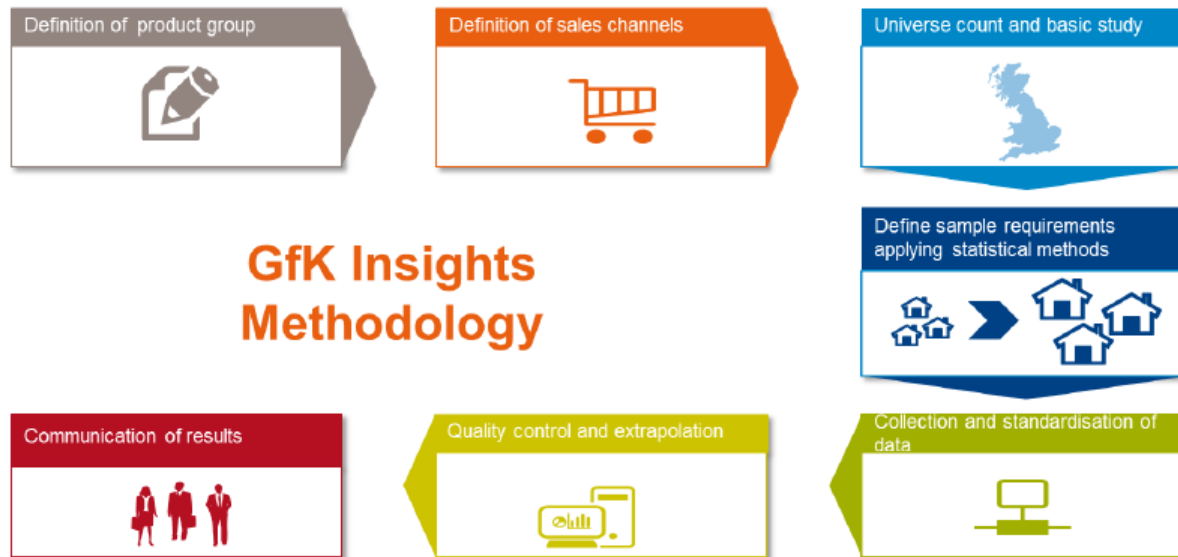
- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end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

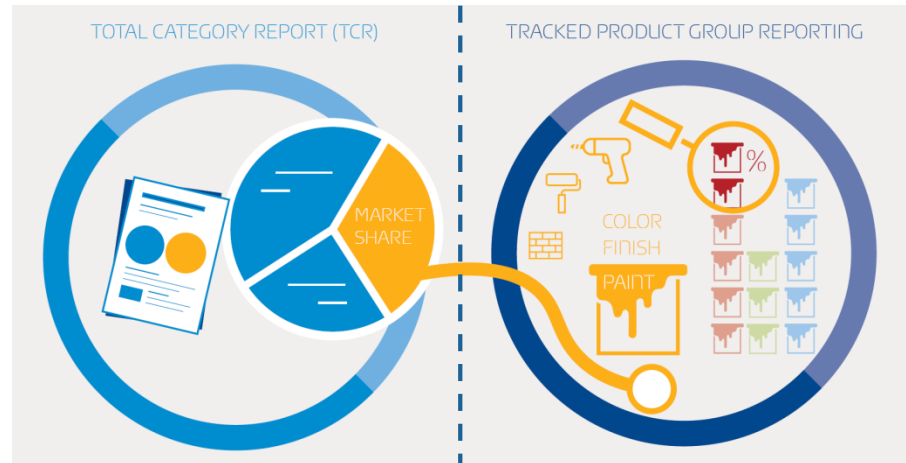
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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](mailto: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)

# BMF Forecast Report

## Winter 2020 edition



### Builders Merchants Industry Forecast Report

The BMF has released the sixth edition of its Builders Merchants Industry Forecast, covering the period October 2020 – December 2021.

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 has 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 Winter 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 Nyssa Patel on 024 7685 4984 or email [nyssa.patel@bmf.org.uk](mailto:nyssa.patel@bmf.org.uk)



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in materials supply"

**Builders Merchants  
Industry Forecast**  
2020 - 2021

**Brexit Report  
Winter Edition**  
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# Contact us

For further information



**Emile van der Ryst**

Senior Client Insight Manager - Trade

[Emile.van-der-ryst@gfk.com](mailto:Emile.van-der-ryst@gfk.com)

+44 (0) 20 7890 9615



**Neil Frackiewicz**

Head of Retail UK

[Neil.frackiewicz@gfk.com](mailto:Neil.frackiewicz@gfk.com)

+44 (0) 20 7890 9123



**Nyssa Patel**

Industry Analyst / Economist

[nyssa.patel@bmf.org.uk](mailto:nyssa.patel@bmf.org.uk)

+44 (0) 24 7685 4994



**Lucia Di Stazio**

Managing Director

[lucia@mra-marketing.com](mailto:lucia@mra-marketing.com)

+44 (0) 1453 521621



**Tom Rigby**

Commercial Manager

[tom@mra-marketing.com](mailto:tom@mra-marketing.com)

+44 (0) 7392 081276