

“building **excellence**  
in materials supply”

Including  
**Plumbing & Heating  
Merchant Index**  
See page 45

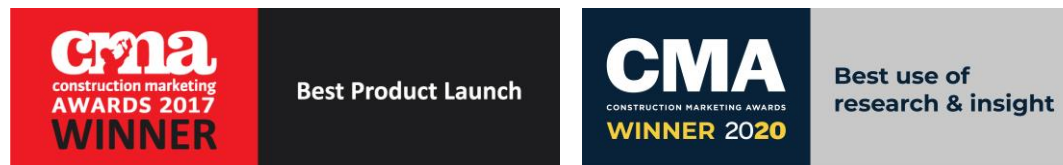
# Builders Merchant Building Index



## Monthly report for January 2021

(Published 19 March 2021)

# Building the Industry & Building Brands from Knowledge



# Contents - 1

Click links below to visit pages



Click links to visit pages:	Page
<a href="#">Introduction</a>	<a href="#">5</a>
<a href="#">Trading day differences explained</a>	<a href="#">6</a>
<a href="#">GfK's Merchant Panel update</a>	<a href="#">7</a>
<a href="#">Overview</a>	<a href="#">8</a>
<a href="#">BMBI Expert Panel</a>	<a href="#">9-10</a>
<b>Monthly data:</b>	
<a href="#">Monthly BMBI indices, by category</a>	<a href="#">11</a>
<a href="#">Monthly index chart, unadjusted and adjusted for trading day differences</a>	<a href="#">12</a>
<a href="#">January index chart, by category</a>	<a href="#">13</a>
<a href="#">Monthly year-on-year chart, unadjusted and adjusted for trading day differences</a>	<a href="#">14</a>
<a href="#">January year-on-year sales index chart, by category</a>	<a href="#">15</a>
<a href="#">January year-on-year average sales a day index chart, by category</a>	<a href="#">16</a>
<a href="#">January v December sales index chart, by category</a>	<a href="#">17</a>
<a href="#">January v December average sales a day index chart, by category</a>	<a href="#">18</a>
<b>Quarterly data:</b>	
<a href="#">Quarterly BMBI indices, by category</a>	<a href="#">19</a>
<a href="#">Quarterly index chart, unadjusted and adjusted for trading day differences</a>	<a href="#">20</a>
<a href="#">Quarter 4 index chart, by category</a>	<a href="#">21</a>
<a href="#">Quarter 4 average sales a day index chart, by category</a>	<a href="#">22</a>
<a href="#">Quarterly indices, by category</a>	<a href="#">23-25</a>
<a href="#">Quarter 4 year-on-year chart, unadjusted and adjusted for trading days</a>	<a href="#">26</a>
<a href="#">Quarter 4 year-on-year sales index chart, by category</a>	<a href="#">27</a>
<a href="#">Quarter 4 year-on-year average sales a day index chart, by category</a>	<a href="#">28</a>
<a href="#">Quarter 4 v Quarter 3 sales index chart, by category</a>	<a href="#">29</a>
<a href="#">Quarter 4 v Quarter 3 average sales a day index chart, by category</a>	<a href="#">30</a>

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
<b>Other periods:</b>	
<a href="#">Last 3 months year-on-year sales index chart, by category</a>	<a href="#">31</a>
<a href="#">Last 3 months v previous 3 months sales index chart, by category</a>	<a href="#">32</a>
<a href="#">Last 3 months v previous 3 months average sales a day index chart, by category</a>	<a href="#">33</a>
<a href="#">Last 12 months index chart, by category</a>	<a href="#">34</a>
<b>Monthly Category Charts:</b>	
<a href="#">Timber &amp; Joinery Products</a>	<a href="#">35</a>
<a href="#">Heavy Building Materials</a>	<a href="#">35</a>
<a href="#">Decorating</a>	<a href="#">36</a>
<a href="#">Tools</a>	<a href="#">36</a>
<a href="#">Workwear &amp; Safetywear</a>	<a href="#">37</a>
<a href="#">Ironmongery</a>	<a href="#">37</a>
<a href="#">Landscaping</a>	<a href="#">38</a>
<a href="#">Plumbing Heating &amp; Electrical</a>	<a href="#">38</a>
<a href="#">Renewables &amp; Water Saving</a>	<a href="#">39</a>
<a href="#">Kitchens &amp; Bathrooms</a>	<a href="#">39</a>
<a href="#">Miscellaneous</a>	<a href="#">40</a>
<a href="#">Services</a>	<a href="#">40</a>
<a href="#">Trading days</a>	<a href="#">41</a>
<a href="#">Methodology</a>	<a href="#">42 – 44</a>

Click links to visit pages:	Page
<b>NEW: Plumbing &amp; Heating Merchant Index:</b>	
<a href="#">Plumbing &amp; Heating Merchant Index</a>	<a href="#">45</a>
<a href="#">Introduction</a>	<a href="#">46</a>
<a href="#">Overview</a>	<a href="#">47</a>
<a href="#">Month and 3-month index table</a>	<a href="#">48</a>
<a href="#">Monthly index</a>	<a href="#">49</a>
<a href="#">Month, year-on-year</a>	<a href="#">50</a>
<a href="#">Month, year-on-year, average sales a day</a>	<a href="#">51</a>
<a href="#">Month on month</a>	<a href="#">52</a>
<a href="#">Rolling 3 months, month-on-month</a>	<a href="#">53</a>
<a href="#">Quarterly index</a>	<a href="#">54</a>
<a href="#">Quarter, year-on-year</a>	<a href="#">55</a>
<a href="#">Quarter on quarter</a>	<a href="#">56</a>
<a href="#">Trading days</a>	<a href="#">57</a>
<a href="#">Plumbing &amp; Heating channel definition and merchants</a>	<a href="#">58</a>
<a href="#">PHMI Contacts</a>	<a href="#">59</a>
<a href="#">BMF Forecast Report</a>	<a href="#">60-61</a>
<a href="#">BMBI Contacts</a>	<a href="#">62</a>

# 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 Research 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.

## 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.

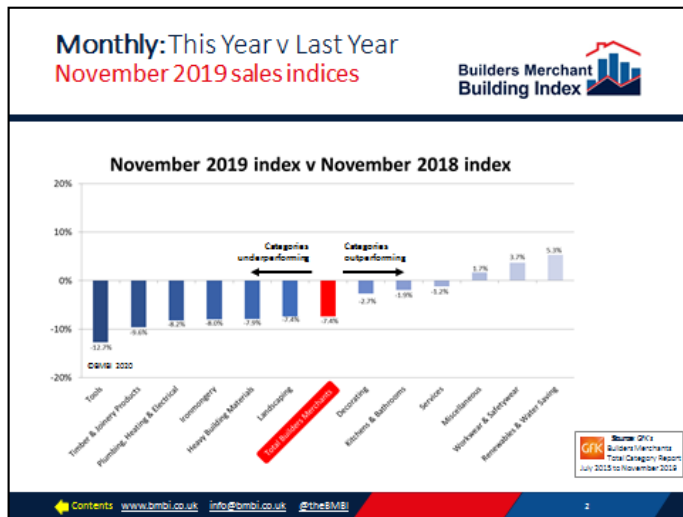
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

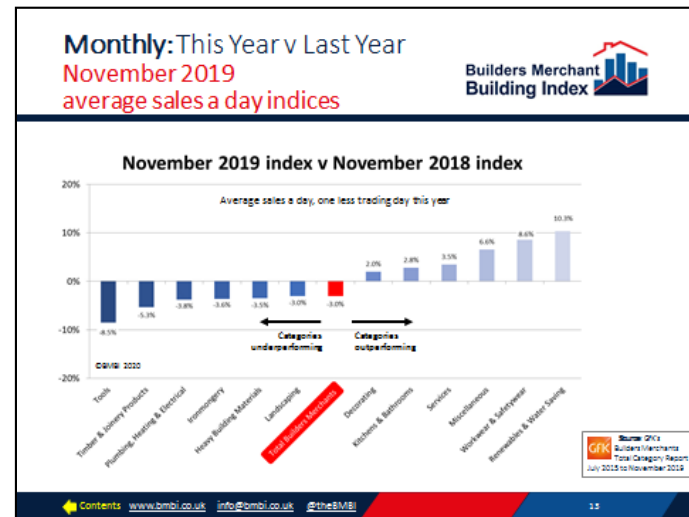
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

## 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 comparison (on the left) show what happened in absolute numbers – average sales a day (on the right) enables trading day differences to be set aside.

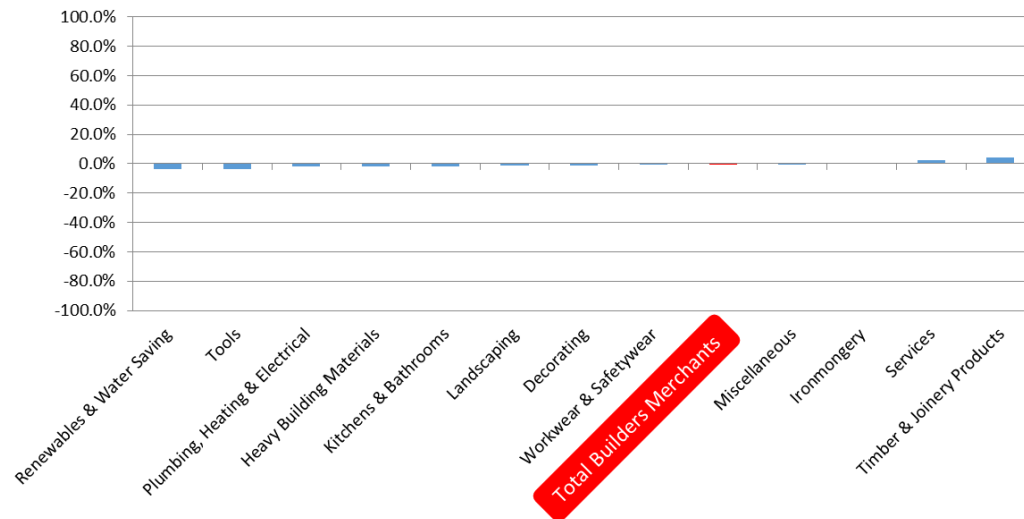
# GfK's Builders Merchant Panel update



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 January 2020 and April 2020 in the Indices table on page 11 are marginally different to those in reports published prior to May 2020. The chart on page 12 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

## Last three months up on previous year, despite lower overall sales in January

### Year-on-Year

Total Builders Merchants January 2021 value sales were 3.7% lower than in January 2020, with two less trading days this year . The month saw the country in lockdown for the third time, potentially affecting indoor trades. Three categories sold more this year, Timber & Joinery Products (+7.7%), Landscaping (+3.7%) and Workwear & Safetywear (+2.4%). The nine categories selling less included Heavy Building Materials (-5.6%), Plumbing Heating & Electrical (-11.9%) and Kitchens & Bathrooms (-13.5%), with Decorating (-17.2%) weakest.

Average sales a day, which take trading differences into account, were 5.9% higher than in January 2020.

### Month-on-Month

Total Merchants January sales were 20.6% higher than in December, helped by three more trading days and all categories sold more. Workwear & Safetywear (+39.1%) did best, with Timber & Joinery Products (+26.2%) and Heavy Building Materials (+22.8%), the largest category, also out-performing merchants generally. Seven categories grew more slowly, including Plumbing Heating & Electrical (+15.8%), Decorating (+12.5%) and Kitchens & Bathrooms (+8.0%).

Average sales a day in January were 2.6% higher than December.

### Other periods

Total sales in the last three months (November 2020 to January 2021) were 4.4% higher than in November 2019 to January 2020, with no difference in trading days. Landscaping (+19.1%) was particularly strong. Timber & Joinery Products (+14.2%) and Heavy Building Materials (+2.9%) were the only other categories selling more, with Workwear & Safetywear (+0.1%) equalling last year. All other categories sold less, with Decorating (-8.0%) doing least well.,

Sales in the 12 months February 2020 to January 2021 were 10.8% lower than in the preceding 12 months. Only Landscaping (+5.7%) sold more. Workwear & Safetywear (-0.6%) and Timber & Joinery Products (-8.4%) did better than merchants overall. Tools (-20.4%) was weakest, closely followed by Plumbing Heating & Electrical (-19.9%) and Kitchens & Bathrooms (-19.2%). However as the first anniversary of Lockdown 1 approaches, with its severe impact on sales in April and May 2020, the scope of returning to MAT year-on-year growth can be anticipated.

### Index

January's BMBI index was 100.7. Workwear & Safetywear (122.3) was strongest followed by Timber & Joinery Products (120.0) and Plumbing Heating & Electrical (+111.3).

Total Builders Merchants January 2021 value sales were 3.7% lower than in January 2020, with two less trading days this year . The month saw the country in lockdown for the third time, potentially affecting indoor trades.



# The Expert Panel

## Speaking for their markets - 1

The Builders Merchant Building Index (BMBI) includes a growing panel of industry Experts. In each quarterly report they comment on the market, with a particular focus on the story behind the trends. Experts are leading brands, or brands aspiring to become leaders, who are the voice of their markets.

The Q4 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: Q4 2020 Report](#)

#### Expert for Bricks & Roof Tiles:



**Kevin Tolson,**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q4 2020 Report](#)

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



**Andy Scothern**  
Managing Director  
eCommonSense

[Read latest Comment: Q4 2020 Report](#)

#### Expert for Civils & Green Infrastructure:



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

[Read latest Comment: Q4 2020 Report](#)

#### Expert for Lead:



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

[Read latest Comment: Q4 2020 Report](#)

#### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q4 2020 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q4 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: Q4 2020 Report](#)

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



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

[Read latest Comment: Q4 2020 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q4 2020 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q4 2020 Report](#)

### Expert for Paint:



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

[Read latest Comment: Q4 2020 Report](#)

### Expert for Shower Enclosures and Showering:



**Mike Tattam**  
Sales & Marketing Director  
Lakes

[Read latest Comment: Q4 2020 Report](#)

# Monthly: Index and Categories

January 2020\* – January 2021

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



		2020												2021
MONTHLY SALES VALUE INDEX	Index	Jan	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan
<b>Total Builders Merchants</b>	<b>100</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>	<b>123.5</b>	<b>83.5</b>	<b>100.7</b>
Timber & Joinery Products	100	111.5	109.0	105.0	26.9	80.5	126.7	140.3	120.6	139.3	141.1	139.9	95.2	120.0
Heavy Building Materials	100	101.7	103.8	102.0	30.5	78.5	116.4	125.6	108.6	125.4	122.8	119.4	78.1	95.9
Decorating	100	103.6	104.5	95.2	19.8	54.8	94.4	112.4	100.1	113.1	111.7	110.5	76.2	85.8
Tools	100	91.8	91.9	74.2	8.6	35.1	79.3	99.0	85.8	98.5	101.0	100.0	70.9	84.4
Workwear & Safetywear	100	119.4	127.7	139.1	37.7	66.6	98.2	131.7	98.4	111.1	125.2	126.7	87.9	122.3
Ironmongery	100	118.7	116.1	104.0	27.3	58.9	108.8	128.7	113.6	127.3	127.3	122.9	87.8	103.1
Landscaping	100	86.9	103.0	110.4	40.3	152.5	223.7	208.2	157.2	161.0	135.6	122.8	78.0	90.1
Plumbing, Heating & Electrical	100	126.3	124.8	104.3	25.4	51.8	84.4	103.1	95.3	115.4	126.0	125.9	96.1	111.3
Renewables & Water Saving	100	75.2	86.1	68.6	12.7	26.7	55.1	69.3	58.2	71.9	67.2	70.3	50.4	62.6
Kitchens & Bathrooms	100	109.1	117.5	101.7	14.1	43.7	87.3	111.1	106.3	117.3	119.3	122.7	87.4	94.4
Miscellaneous	100	119.9	114.7	152.6	36.7	55.1	98.0	112.4	98.2	122.3	120.8	118.9	86.1	109.4
Services	100	103.0	106.1	105.3	42.3	70.2	105.9	119.4	109.2	119.2	117.5	115.4	89.0	93.5

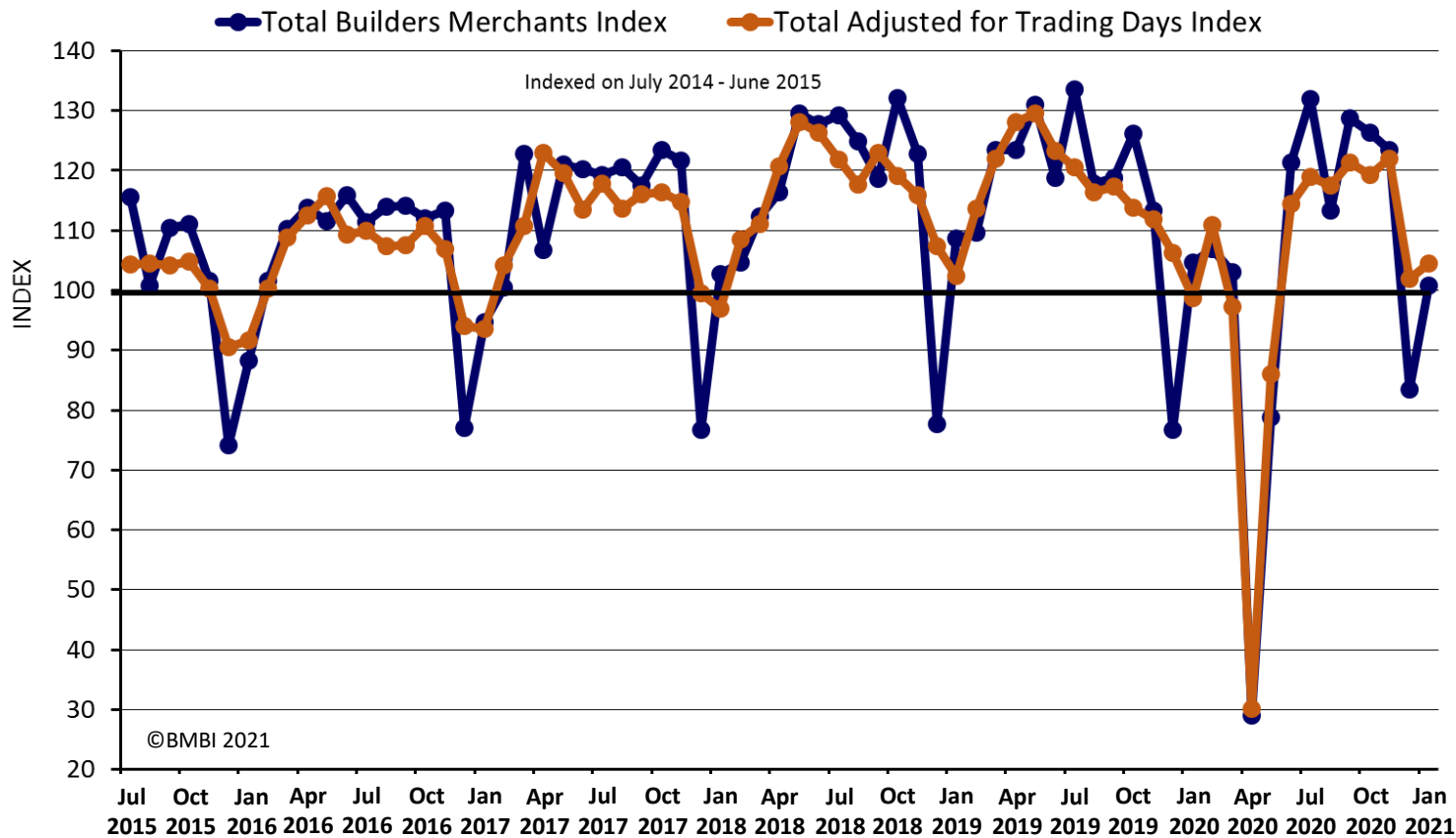
\*Click the web link below to see the complete series of indices from July 2015.

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Index

Adjusted and unadjusted for trading days

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



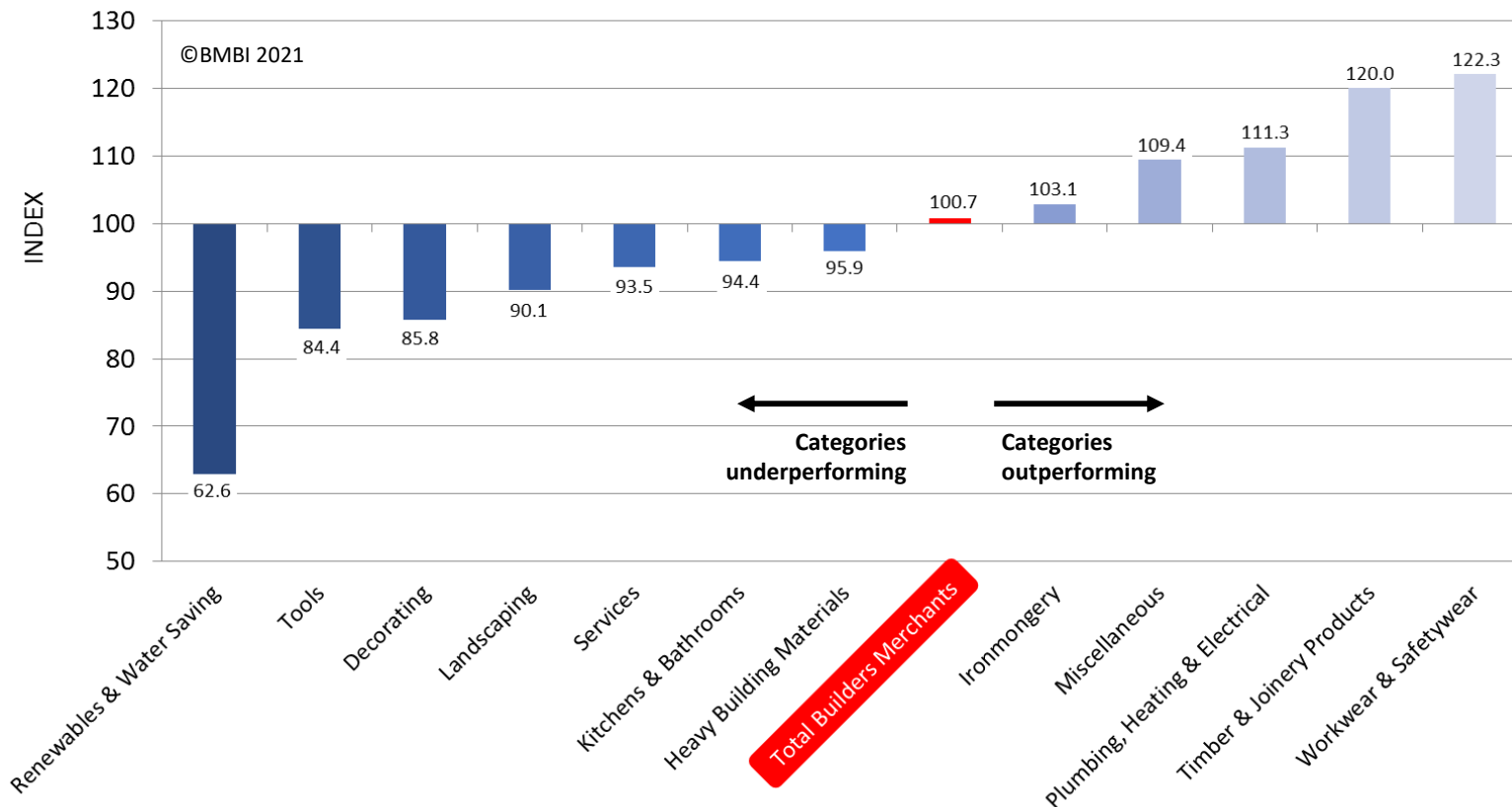
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Index and Categories

January 2021 index



## January 2021 Index



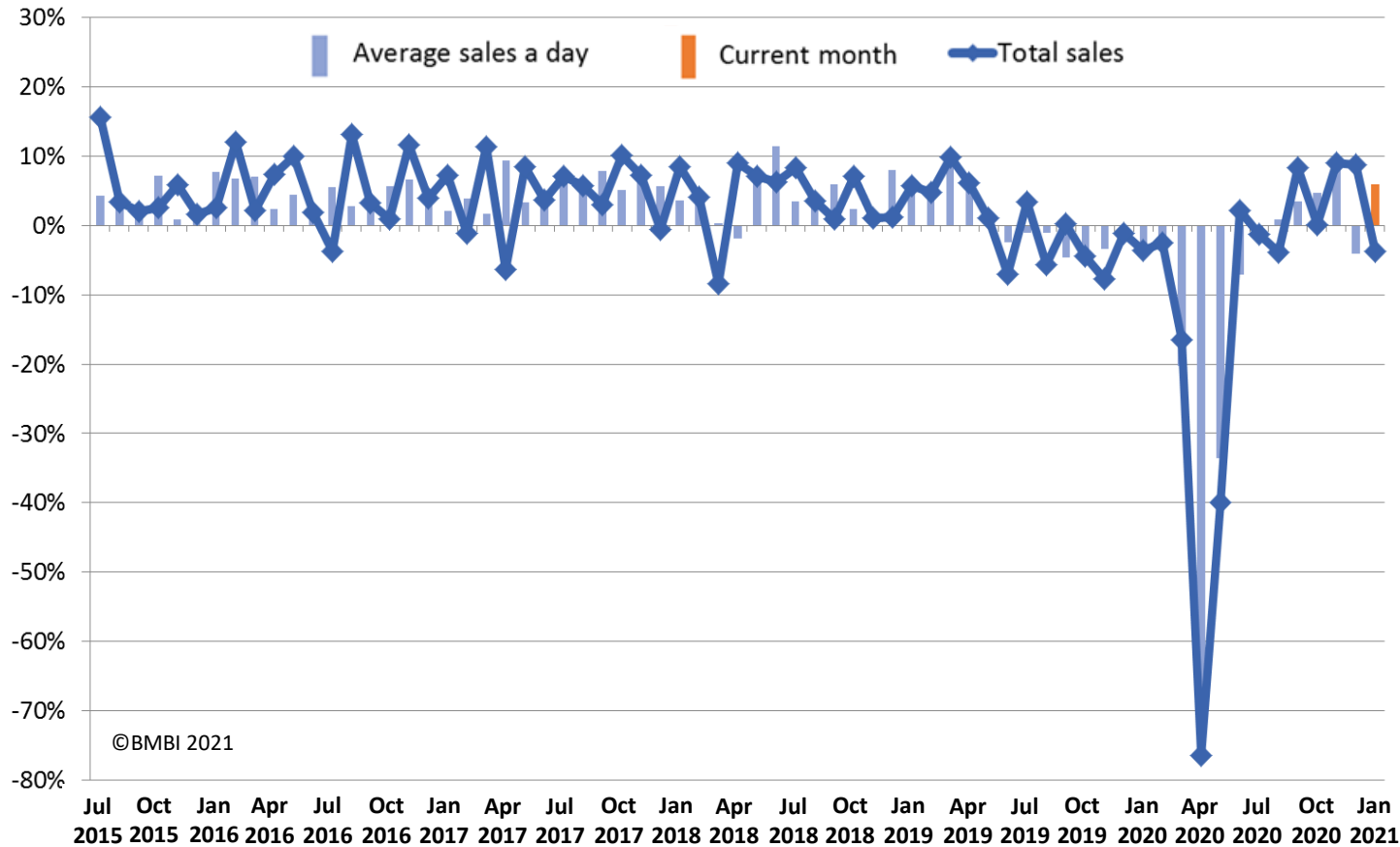
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



## Monthly: Year on Year



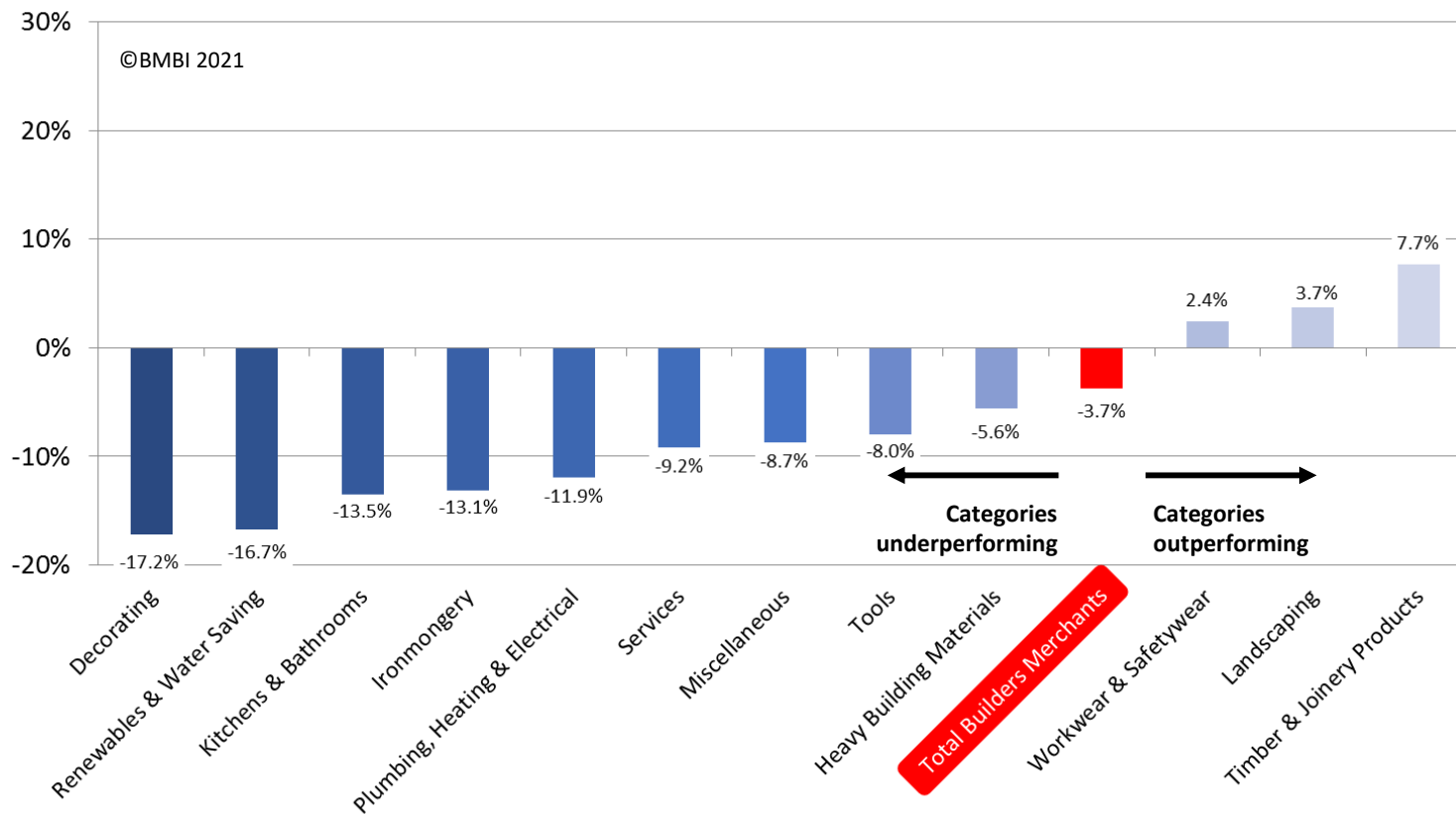
 Source: GfK's Builders Merchants Total Category Report July 2015 to January 2021

# Monthly: This Year v Last Year

January 2021 sales indices



## January 2021 index v January 2020 index



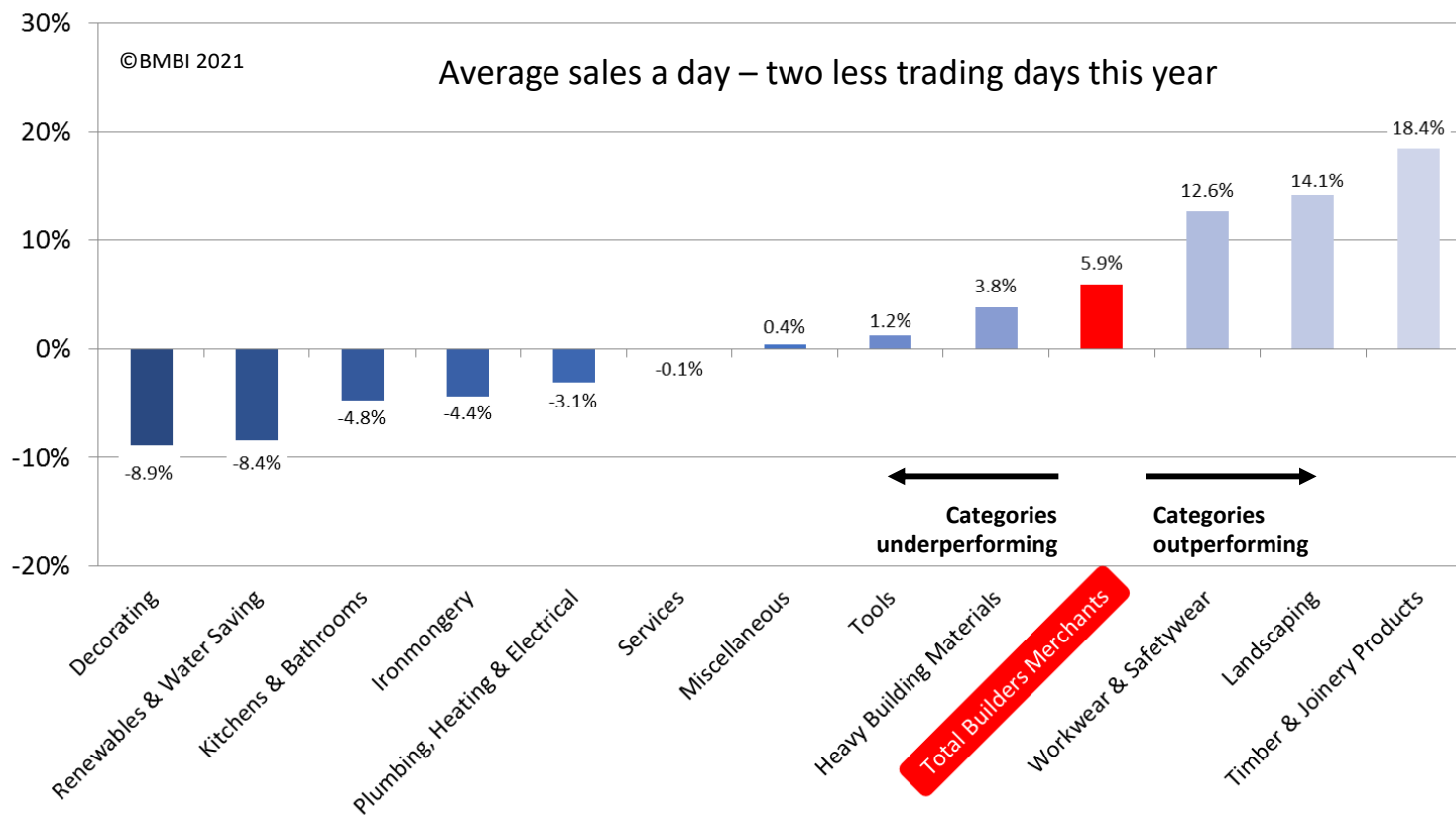
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: This Year v Last Year

January 2021 average sales a day indices



## January 2021 index v January 2020 index



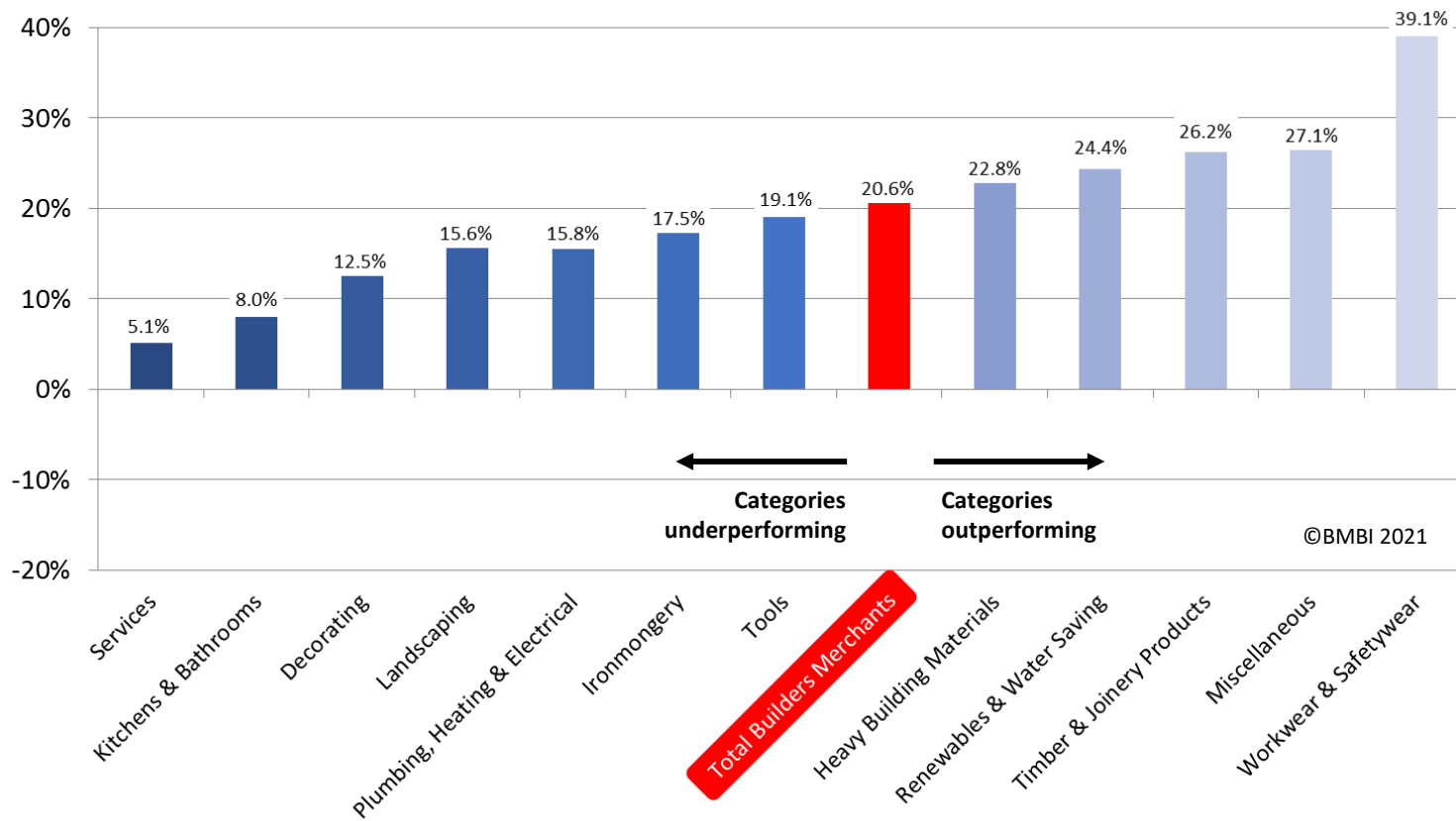
Source: GfK's Builders Merchants Total Category Report July 2015 to January 2021



# Monthly: This Month v Last Month

January 2021 sales indices

## January 2021 Index v December 2020 Index



 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: This Month v Last Month

January 2021 average sales a day indices



## January 2021 Index v December 2020 Index



 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Quarterly: Index and Categories

Quarter 4 2019\* to Quarter 4 2020

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
<b>Total Builders Merchants</b>	<b>100</b>	<b>105.4</b>	<b>104.9</b>	<b>76.4</b>	<b>124.6</b>	<b>111.1</b>
Timber & Joinery Products	100	111.3	108.5	78.0	133.4	125.4
Heavy Building Materials	100	102.3	102.5	75.1	119.9	106.8
Decorating	100	104.7	101.1	56.3	108.5	99.5
Tools	100	92.2	86.0	41.0	94.4	90.7
Workwear & Safetywear	100	117.4	128.7	67.5	113.7	113.3
Ironmongery	100	113.6	112.9	65.0	123.2	112.6
Landscaping	100	91.2	100.1	138.8	175.5	112.1
Plumbing, Heating & Electrical	100	123.4	118.5	53.9	104.6	116.0
Renewables & Water Saving	100	65.8	76.6	31.5	66.4	62.6
Kitchens & Bathrooms	100	112.8	109.4	48.4	111.6	109.8
Miscellaneous	100	114.9	129.1	63.3	111.0	108.6
Services	100	110.3	104.8	72.8	115.9	107.3

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

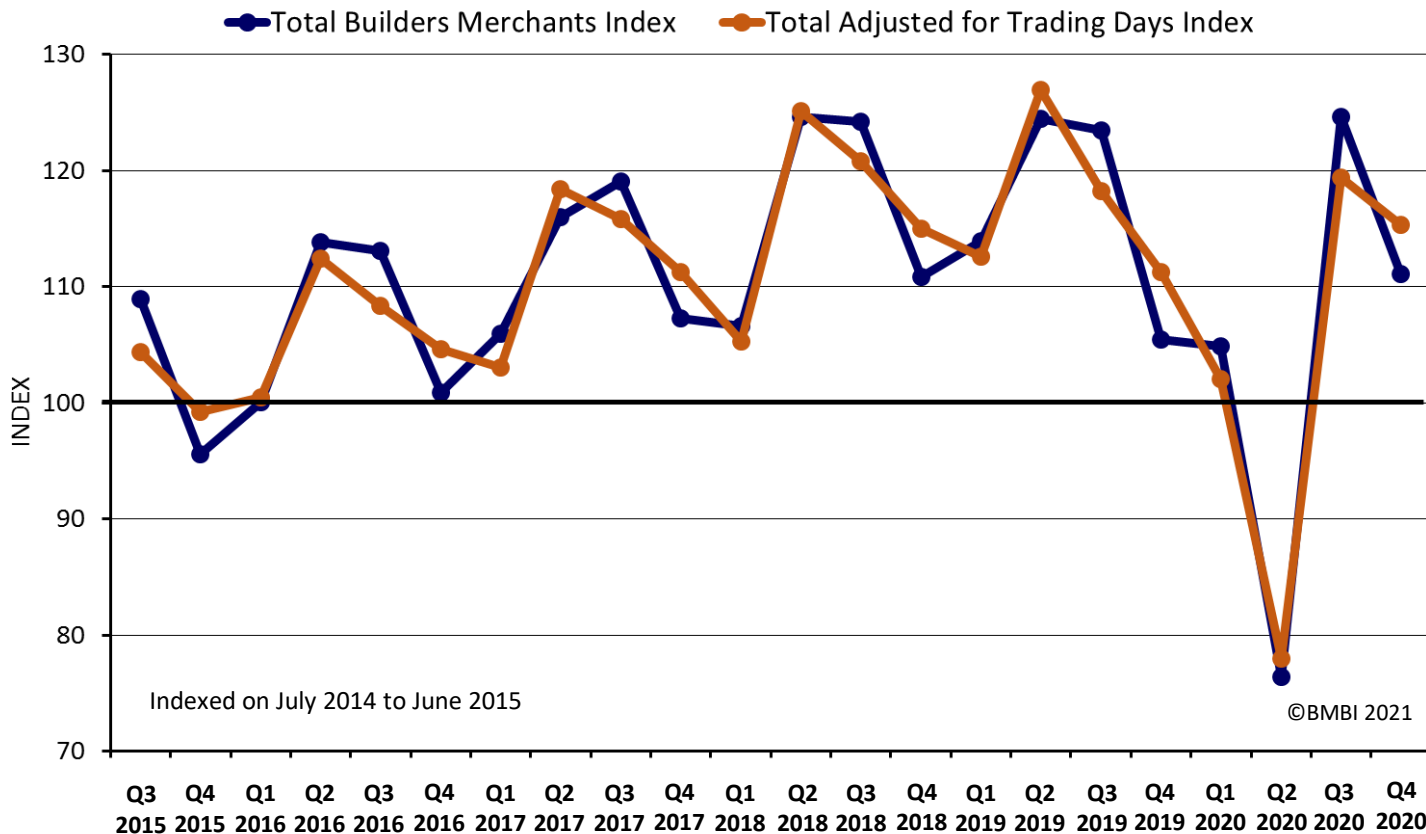

**Source:** GfK's  
 Builders Merchants  
 Total Category Report  
 July 2015 to December 2020

# 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 December 2020

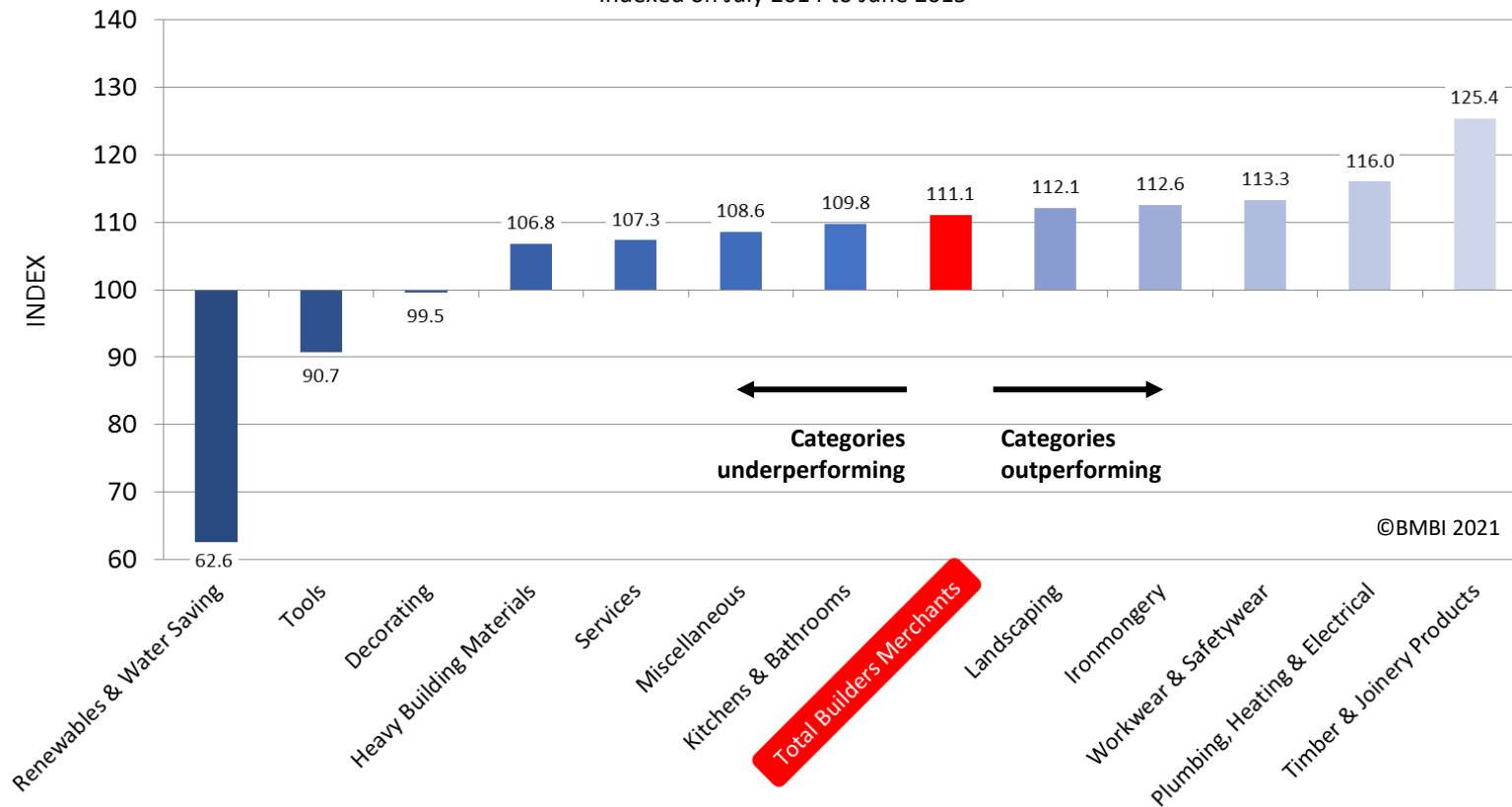
# Quarterly: Index and Categories

Q4 2020 index



## Quarter 4 2020

Indexed on July 2014 to June 2015



©BMBI 2021

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

# Quarterly: Index and Categories

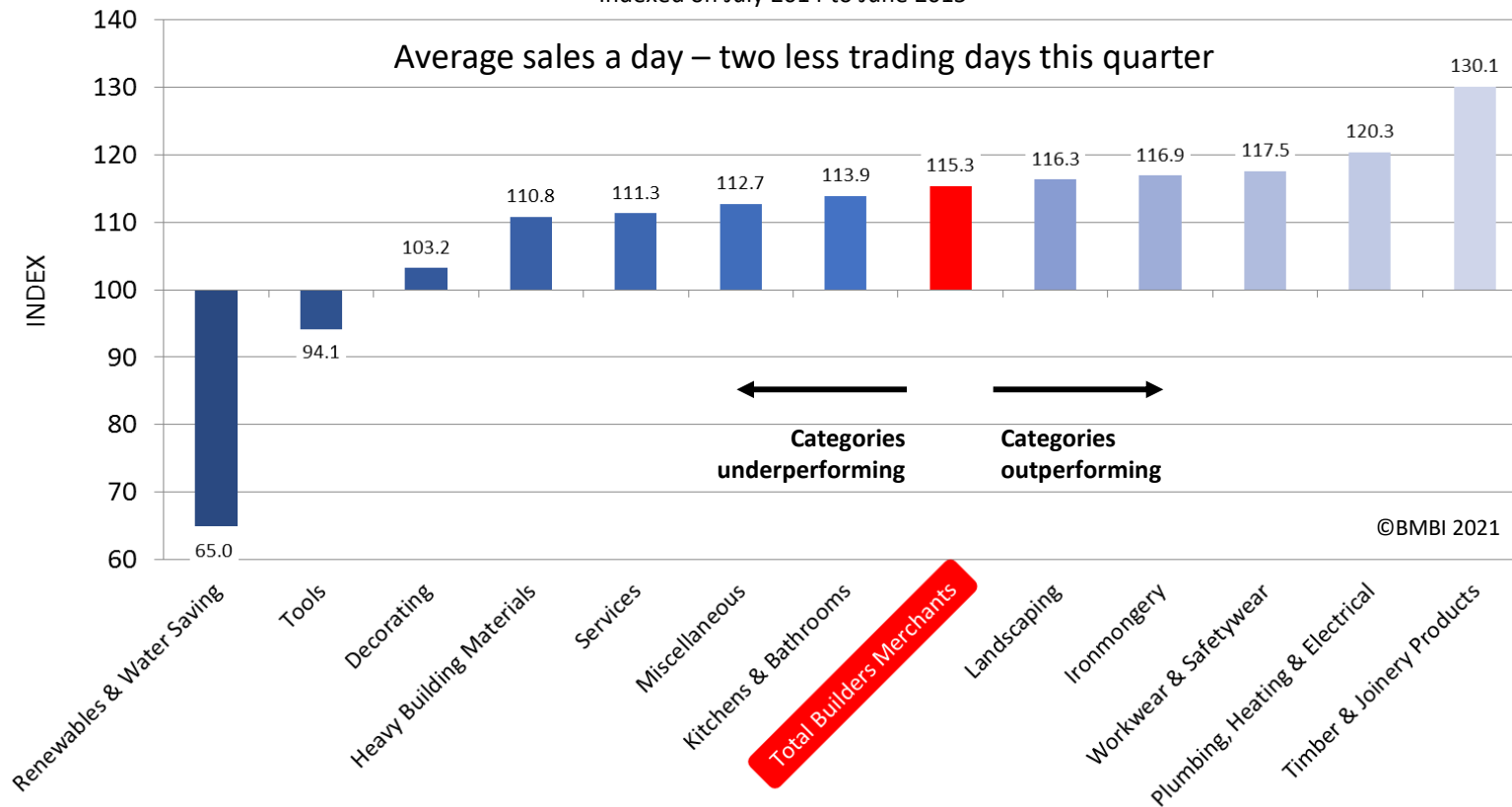
Q4 2020 average sales a day index



## Quarter 4 2020

Indexed on July 2014 to June 2015

Average sales a day – two less trading days this quarter



©BMBI 2021

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

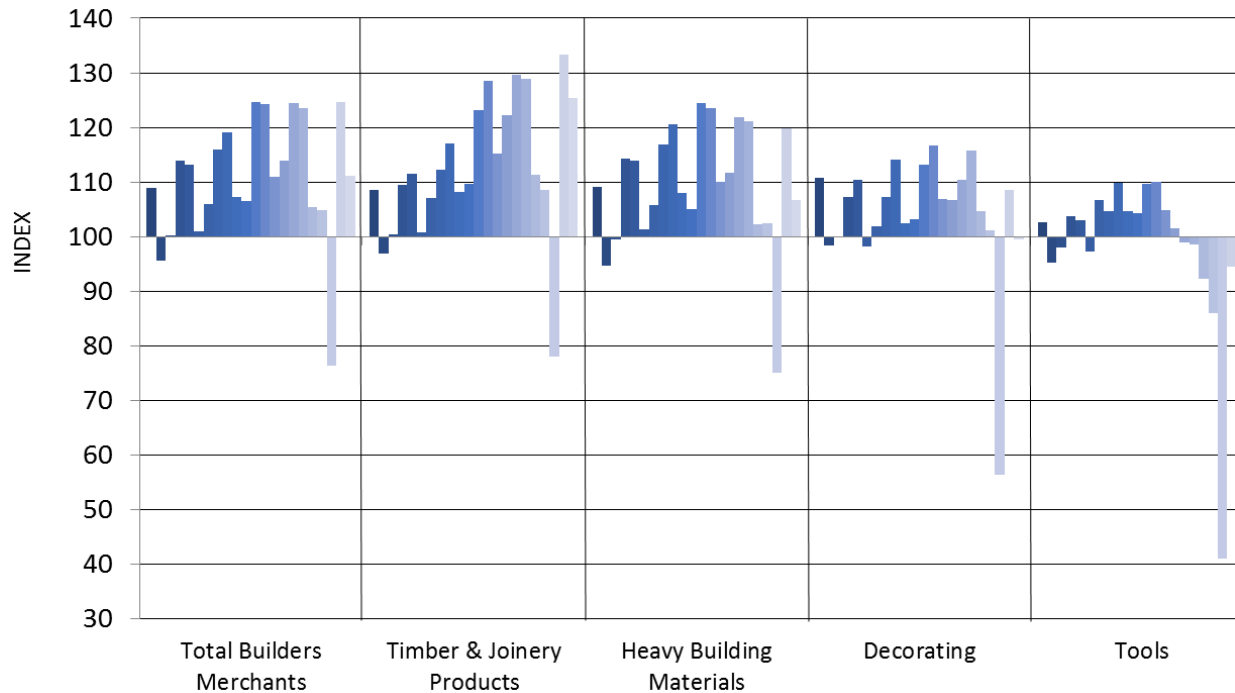
# Quarterly: Index and Categories

Quarterly indices



## Quarterly Indices Q3 2015 to Q4 2020

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020



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

# Quarterly: Index and Categories

Quarterly indices



## Quarterly Indices Q3 2015 to Q4 2020

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020



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



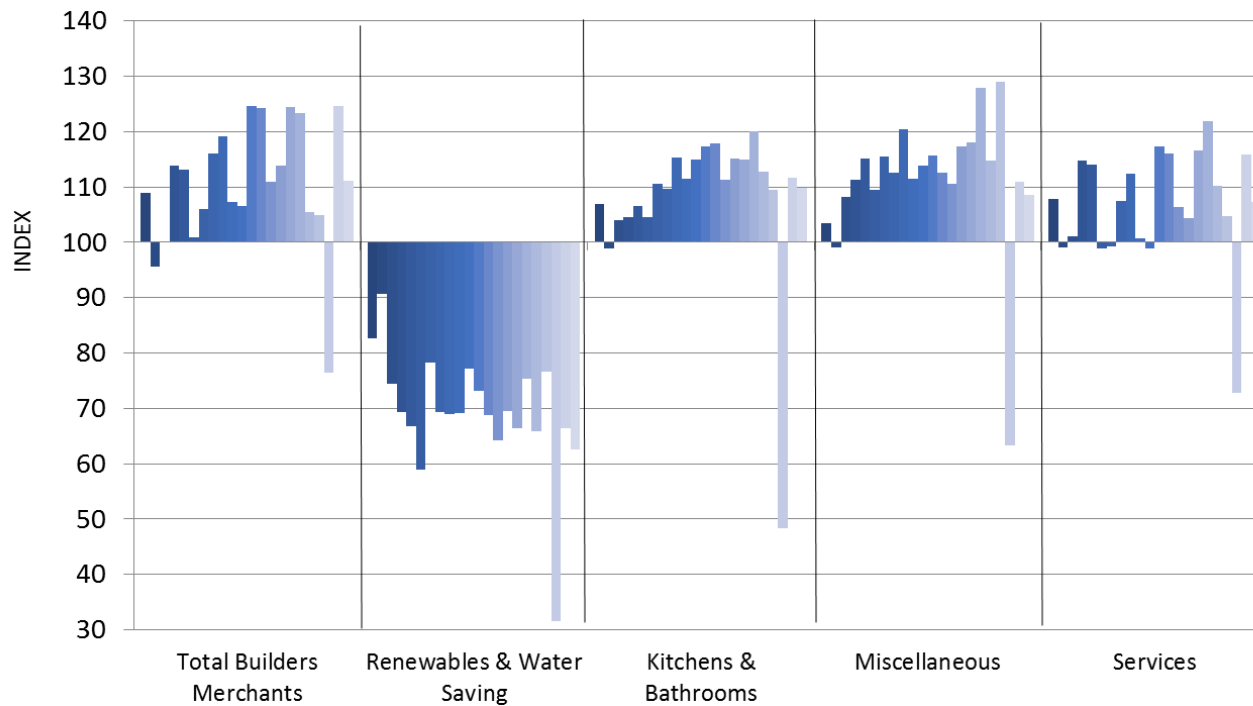
# Quarterly: Index and Categories

Quarterly indices



## Quarterly Indices Q3 2015 to Q4 2020

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020

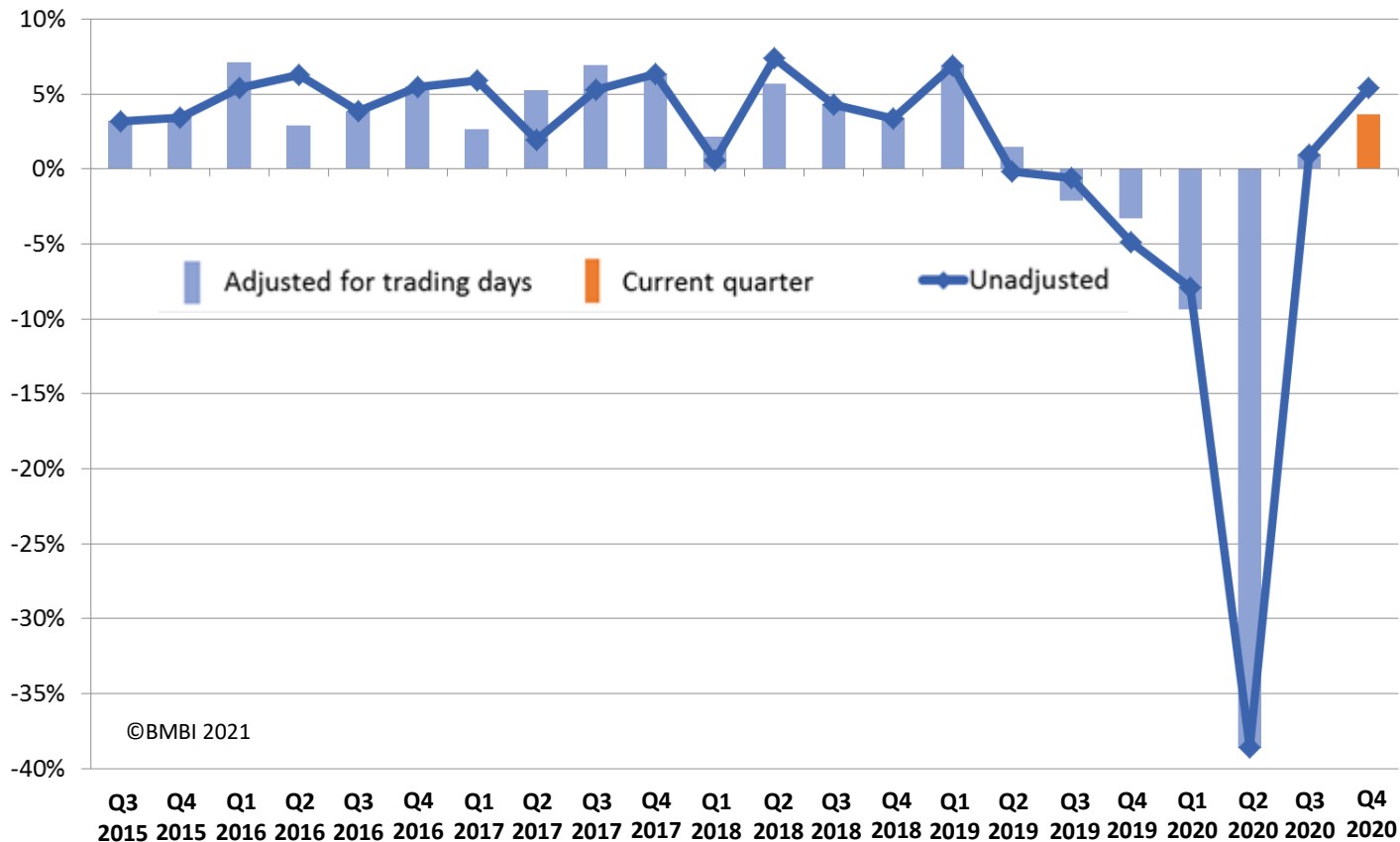


 Source: GfK's Builders Merchants Total Category Report July 2015 to December 2020

# Quarterly: Sales Indices

Adjusted and unadjusted for trading days

## Quarterly Indices: Year on Year



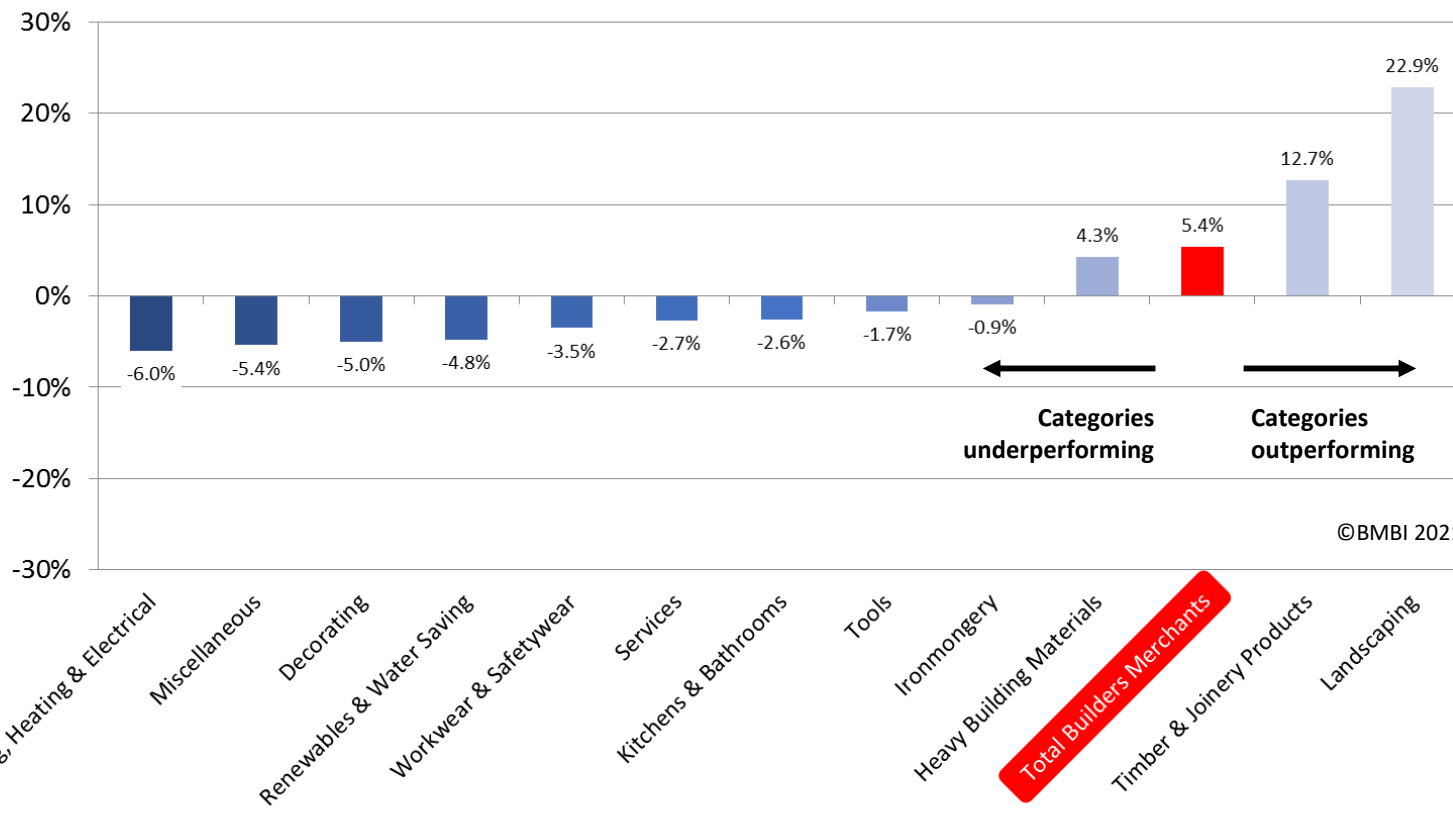
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2020

# Quarterly: This Year v Last Year

Q4 2020 sales indices



## Quarter 4 2020 index v Quarter 4 2019 index



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

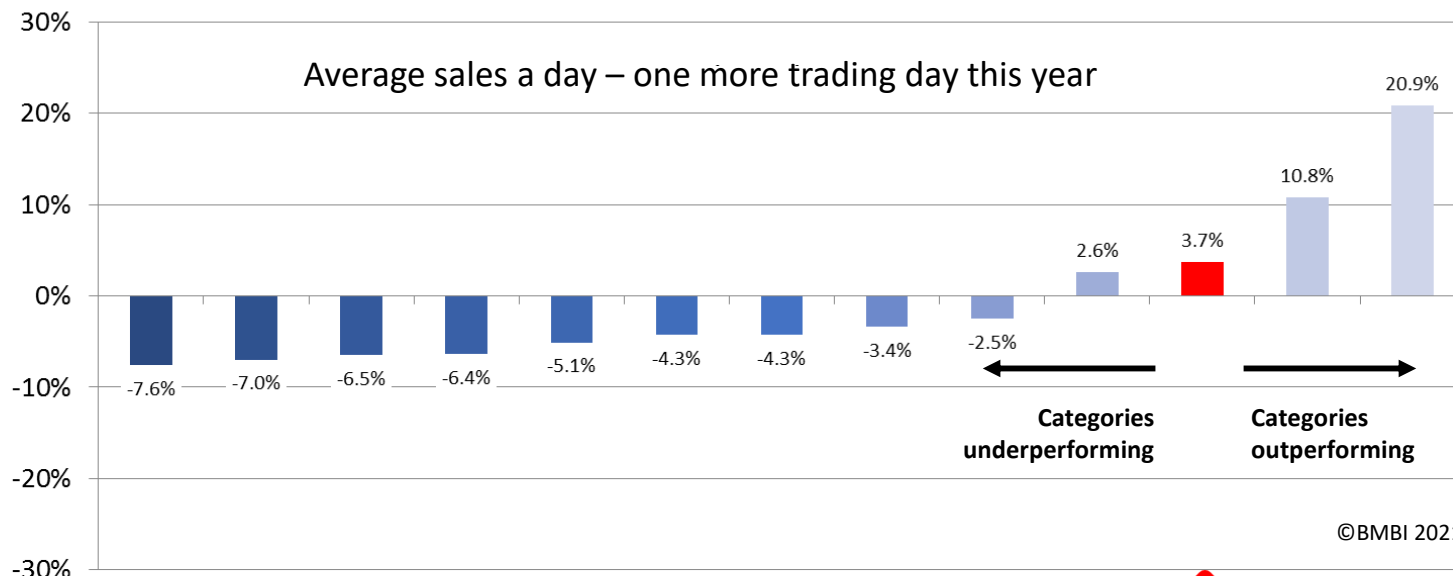
# Quarterly: This Year v Last Year

Q4 2020 average sales a day indices



## Quarter 4 2020 index v Quarter 4 2019 index

Average sales a day – one more trading day this year



©BMBI 2021

**Total Builders Merchants**

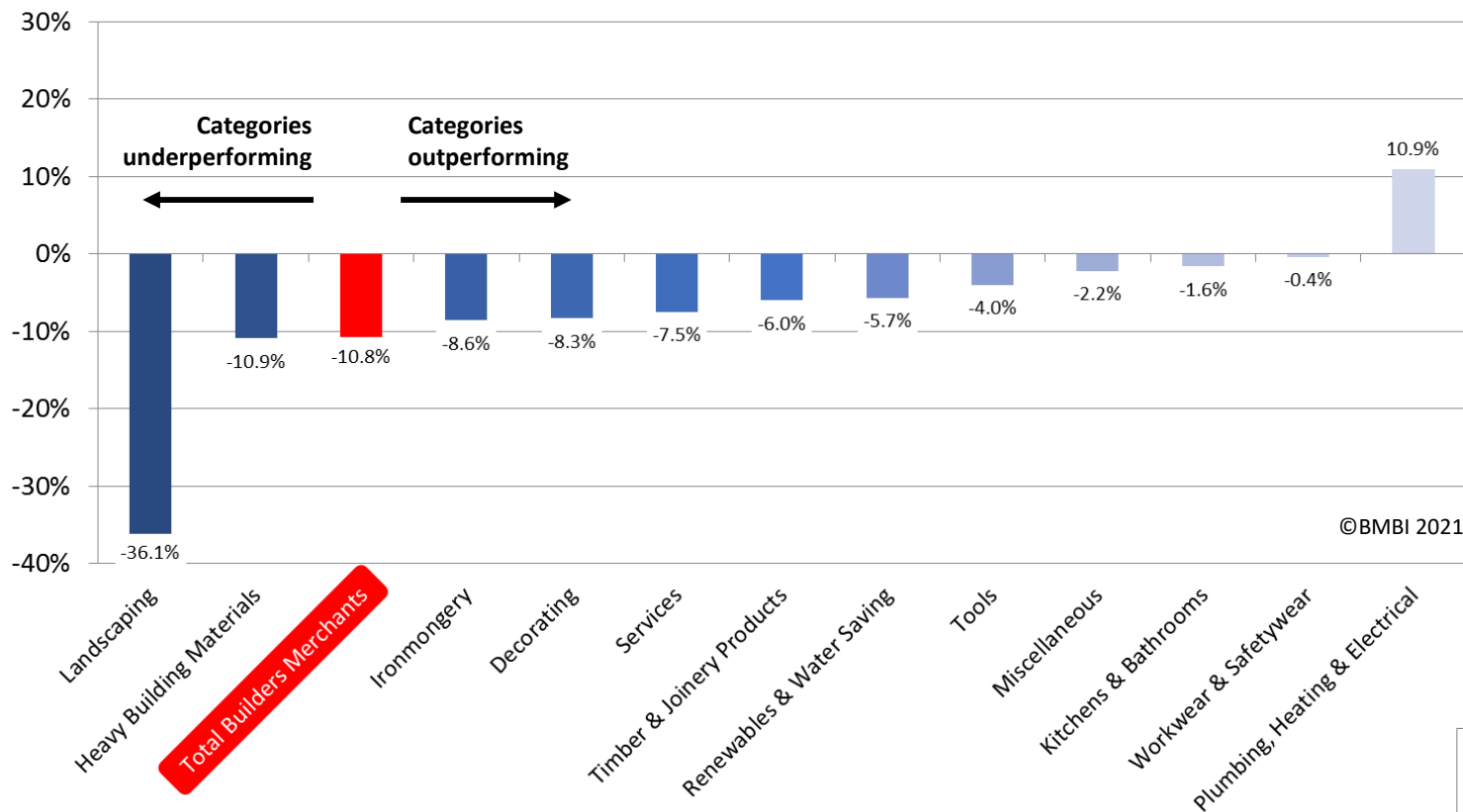
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2020

# Quarterly: Quarter on Quarter

Q4 2020 sales indices



## Quarter 4 2020 index v Quarter 3 2020 index



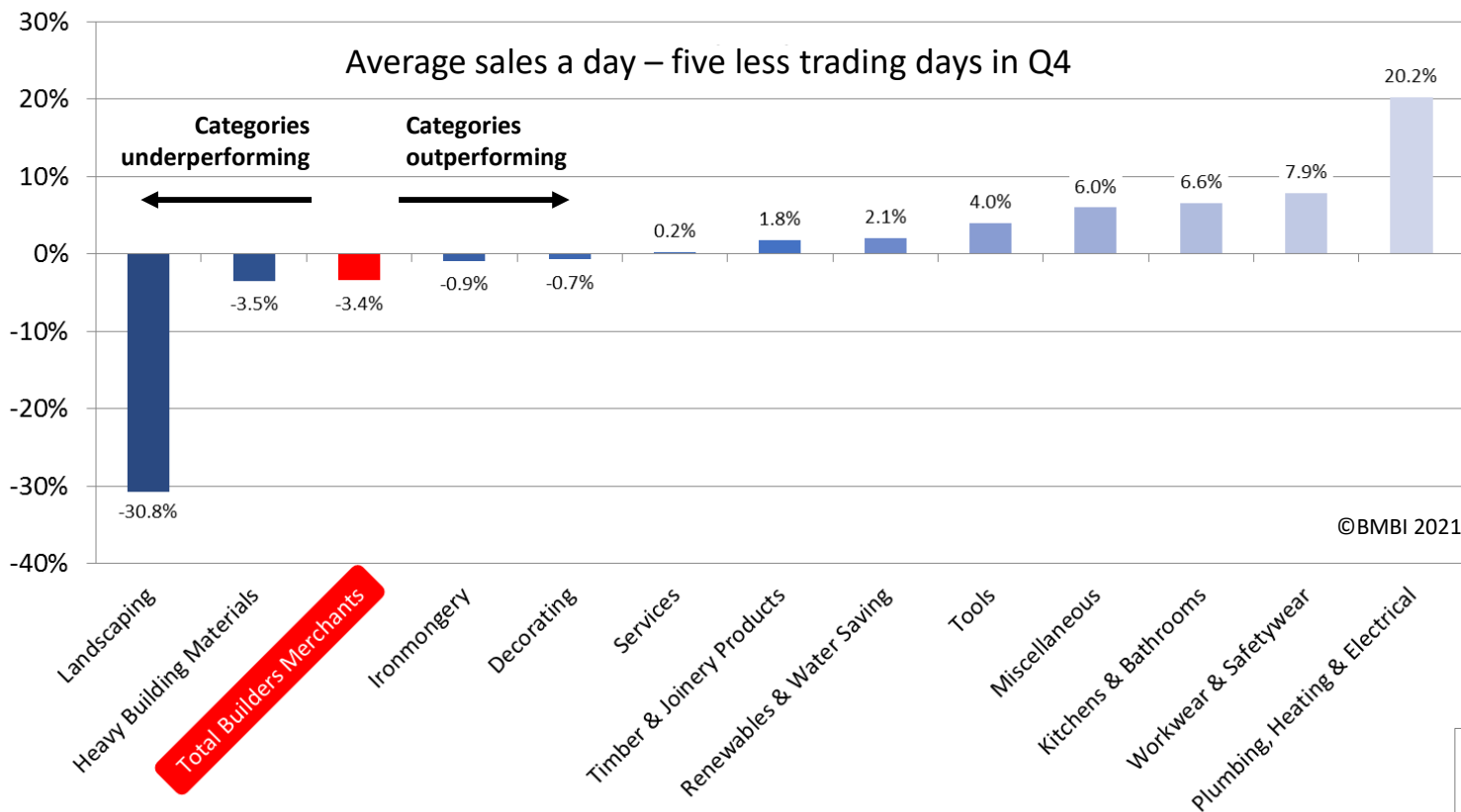
©BMBI 2021

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

# Quarterly: Quarter on Quarter

Q4 2020 average sales a day indices

## Quarter 4 2020 index v Quarter 3 2020 index



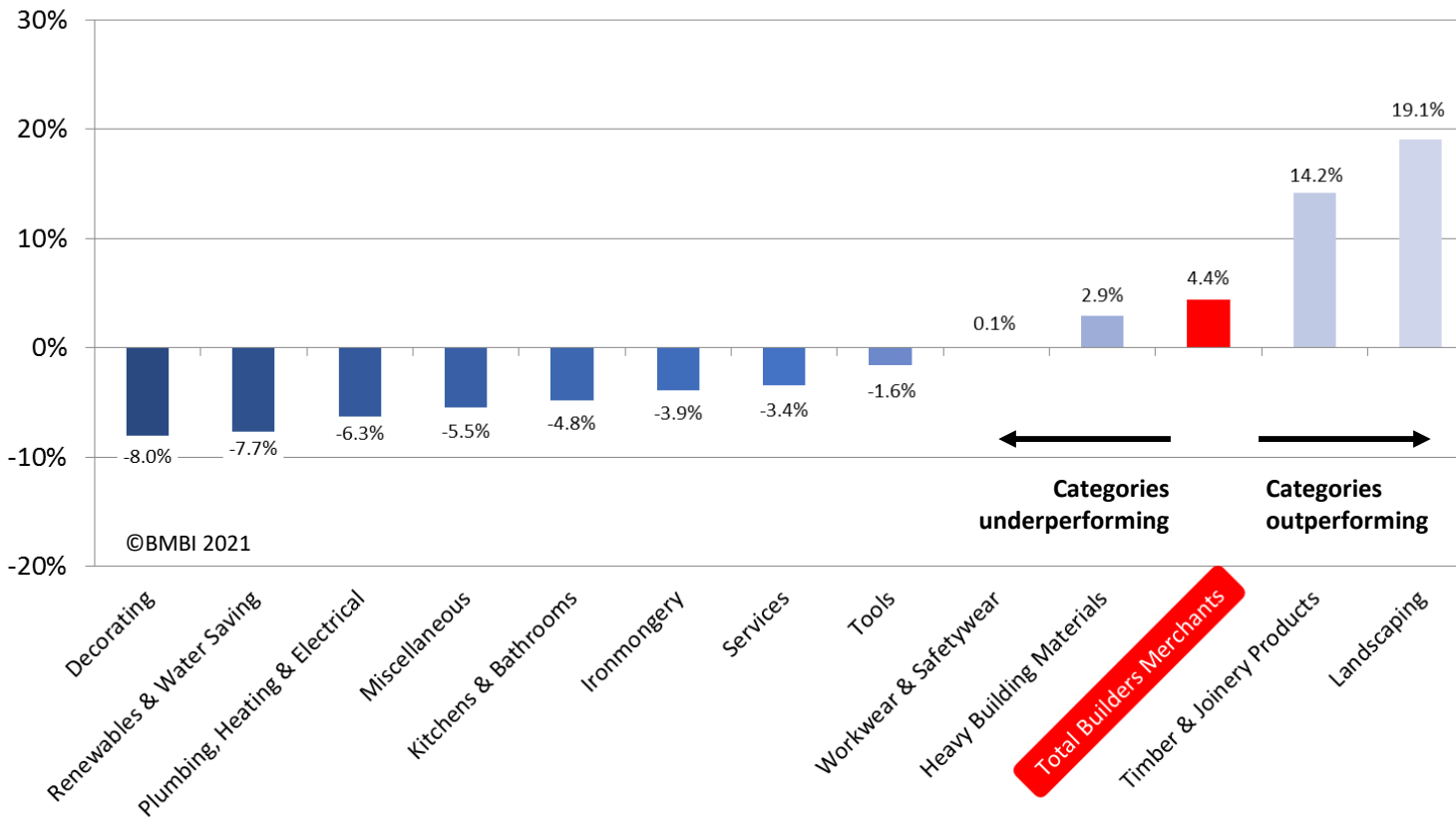
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to December 2020

# Latest 3 months: Year on Year

November to January sales indices



## 3 months Nov 20 to Jan 21 v 3 months Nov 19 to Jan 20



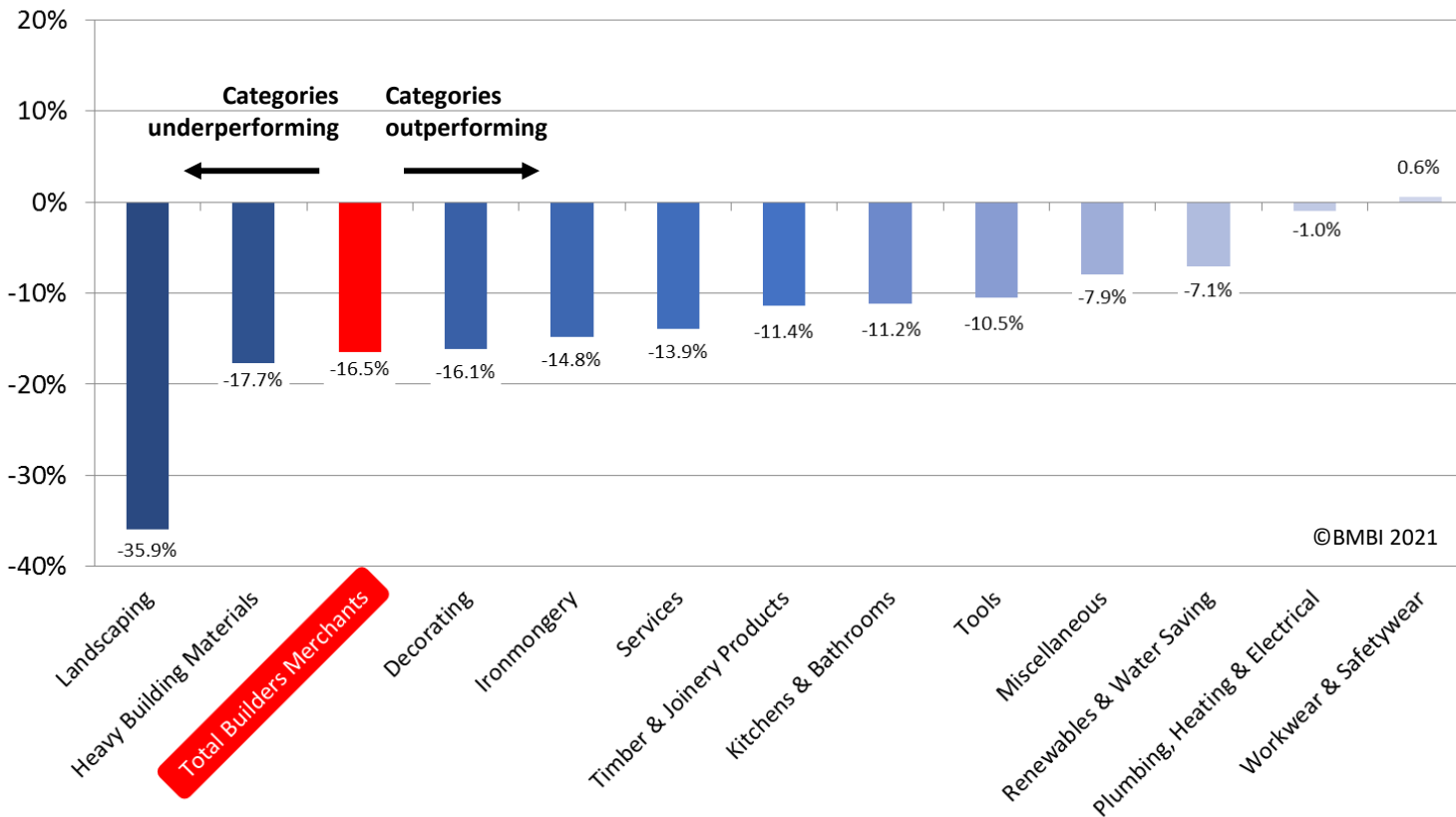
Source: GfK's Builders Merchants Total Category Report July 2015 to January 2021

# Latest 3 months: previous 3 months

November to January sales indices



## 3 months Nov 20 to Jan 21 v 3 months Aug 20 to Oct 20



©BMBI 2021

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

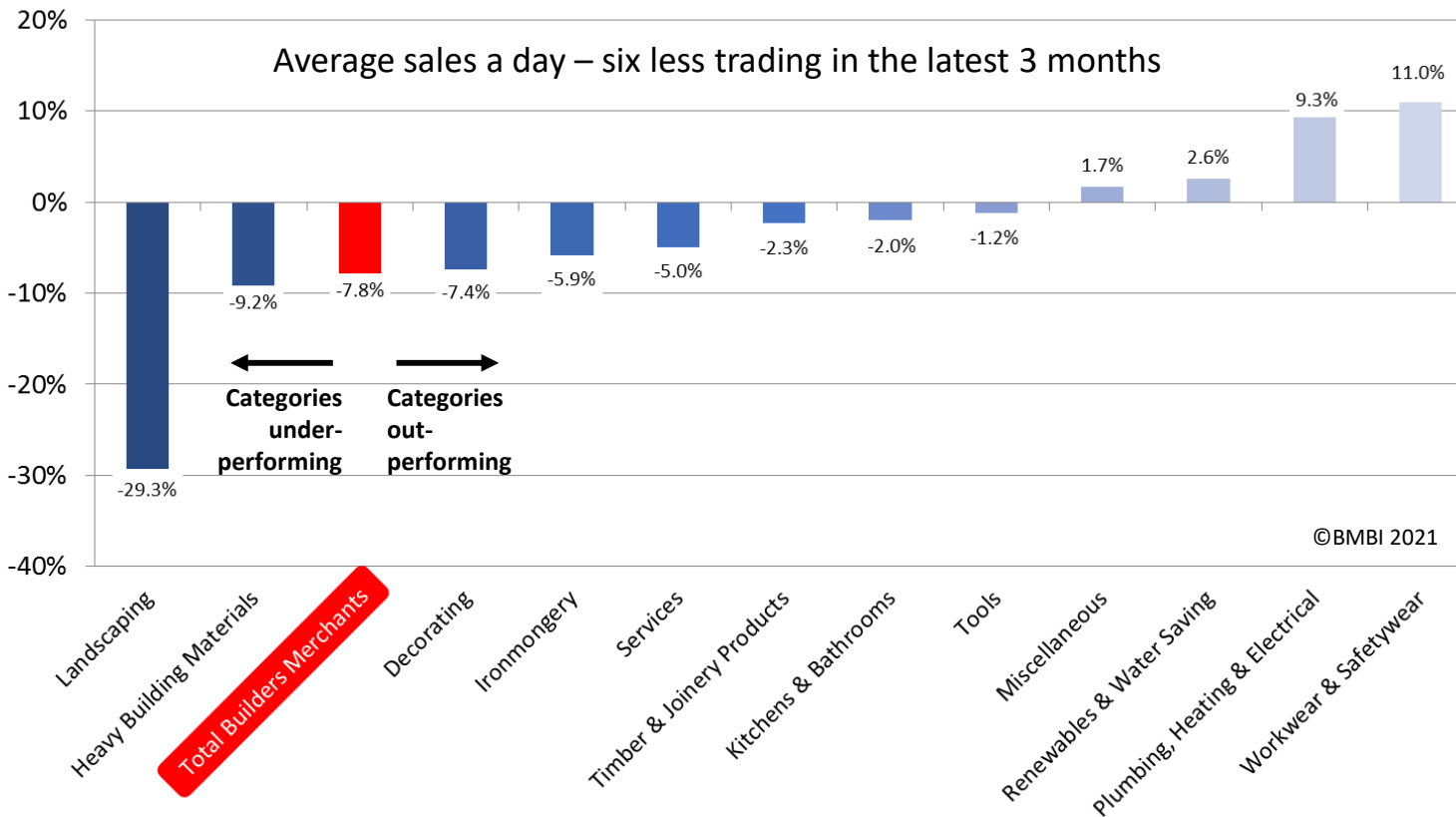


# Latest 3 months: previous 3 months

November to January average sales a day indices



## 3 months Nov 20 to Jan 21 v 3 months Aug 20 to Oct 20

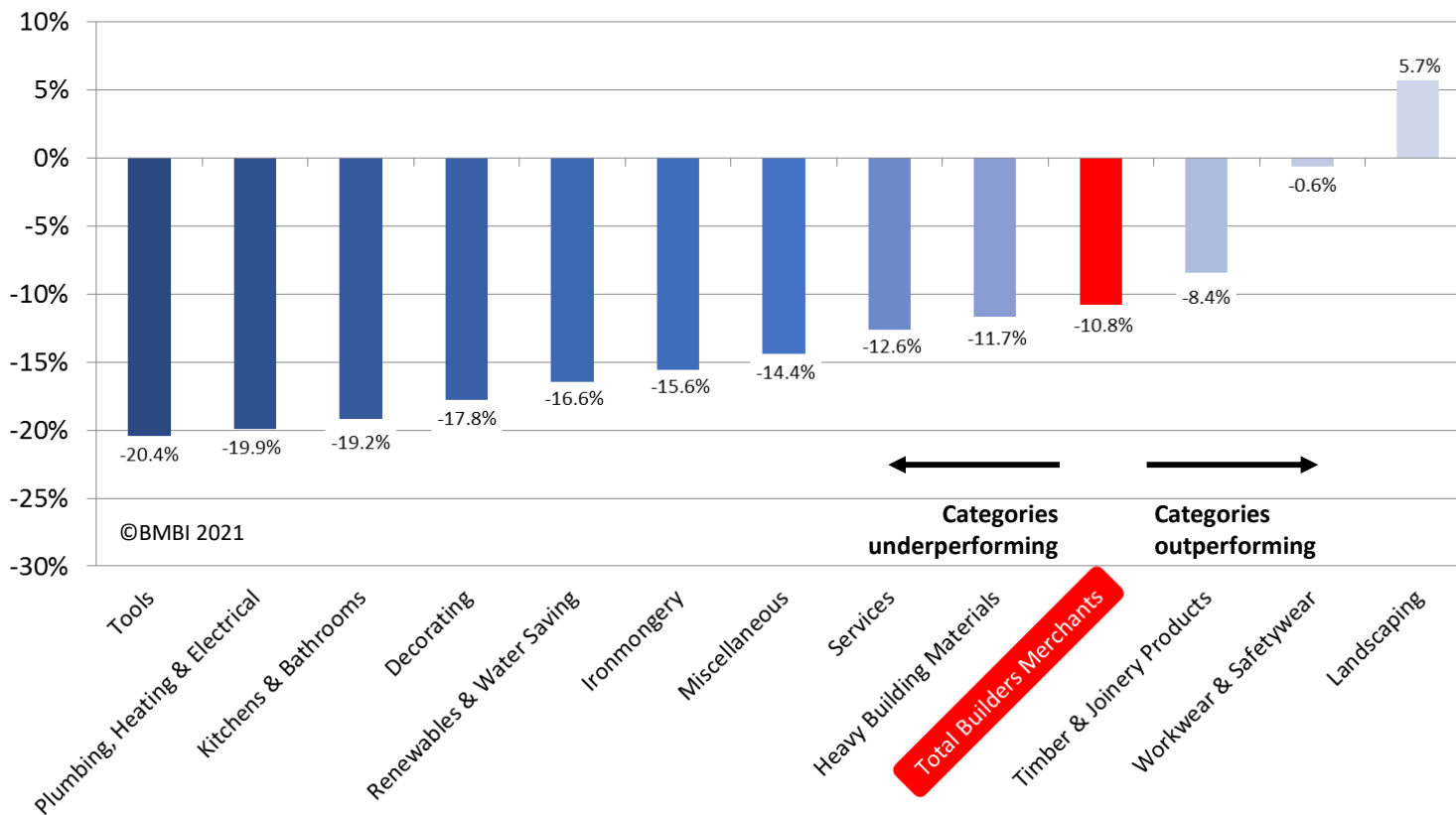


Source: GfK's Builders Merchants Total Category Report July 2015 to January 2021

# Last 12 months: Year on Year

MAT

## 12 months Feb 20 to Jan 21 v 12 months Feb 19 to Jan 20



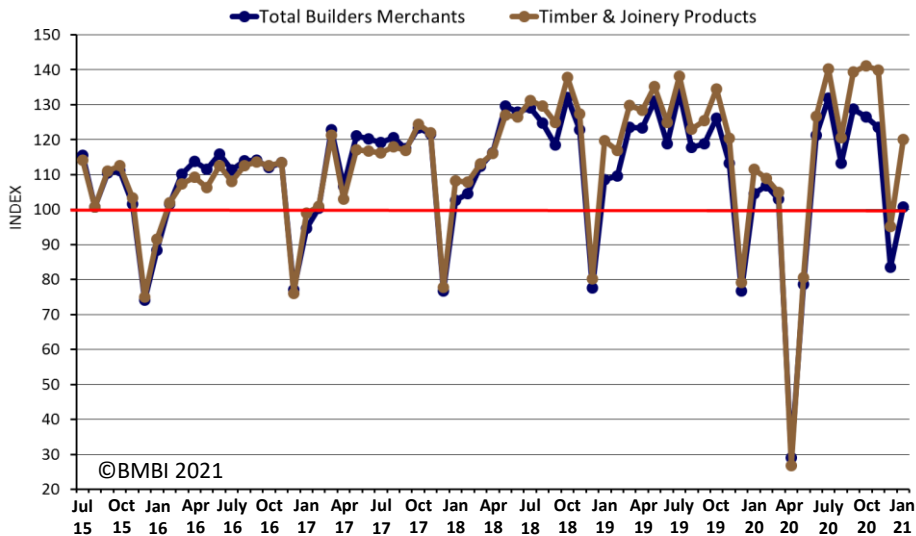
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Indices

## January 2021

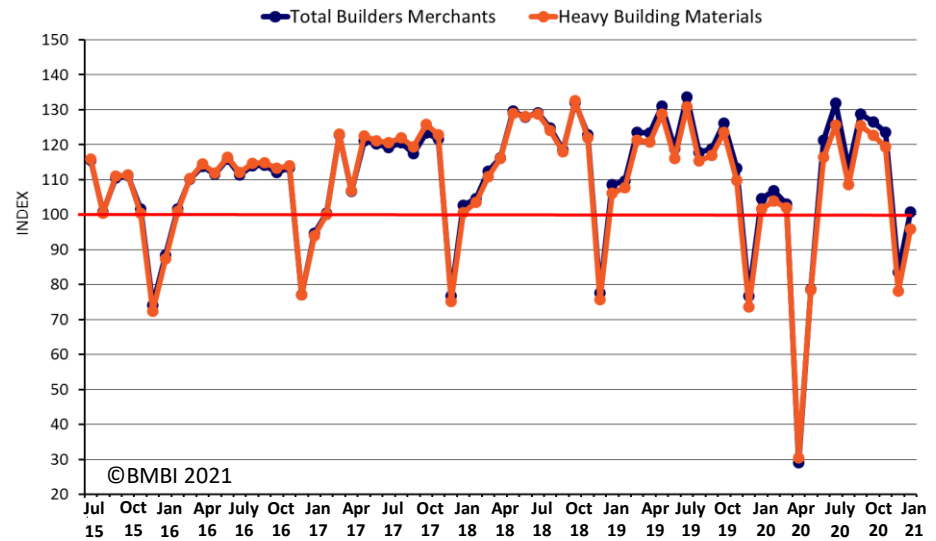


### Timber & Joinery Products



Indexed on July 2014 – June 2015

### Heavy Building Materials



Indexed on July 2014 – June 2015

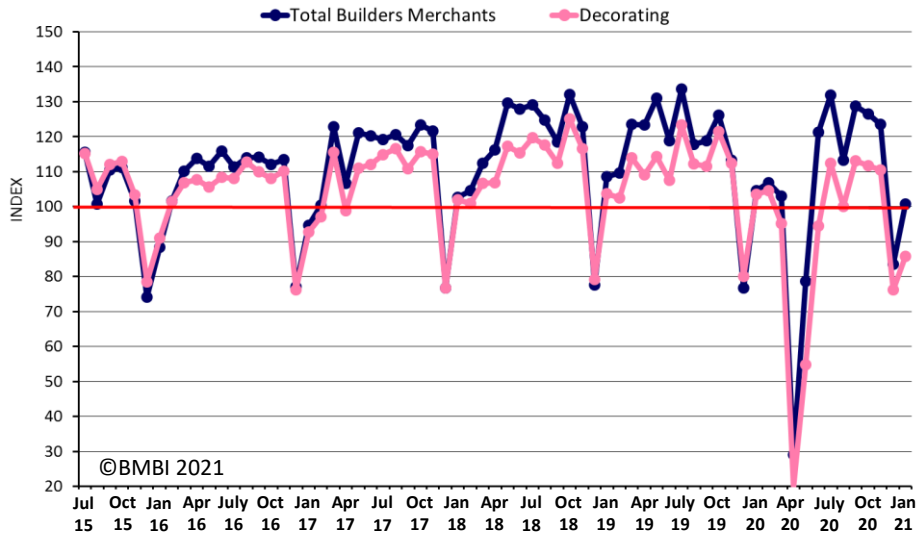
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Indices

January 2021

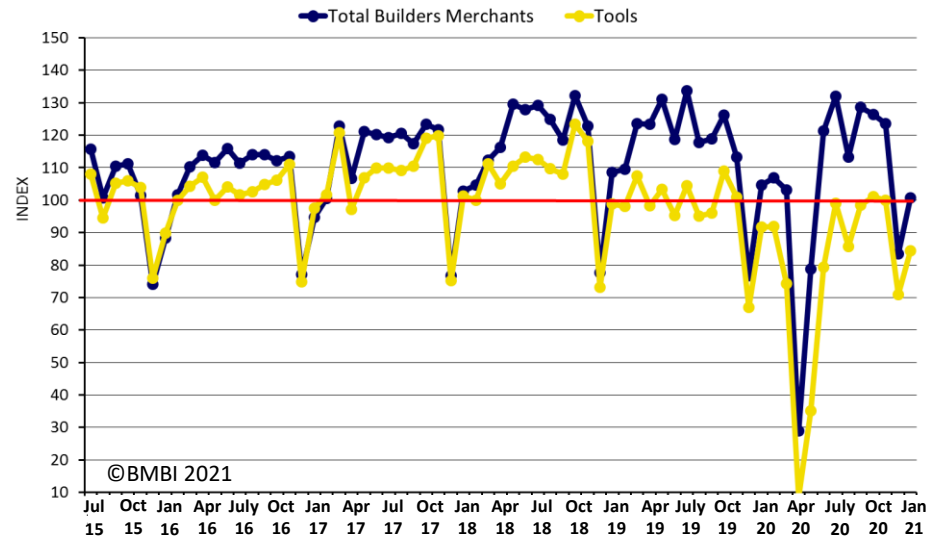


## Decorating



Indexed on July 2014 – June 2015

## Tools



Indexed on July 2014 – June 2015

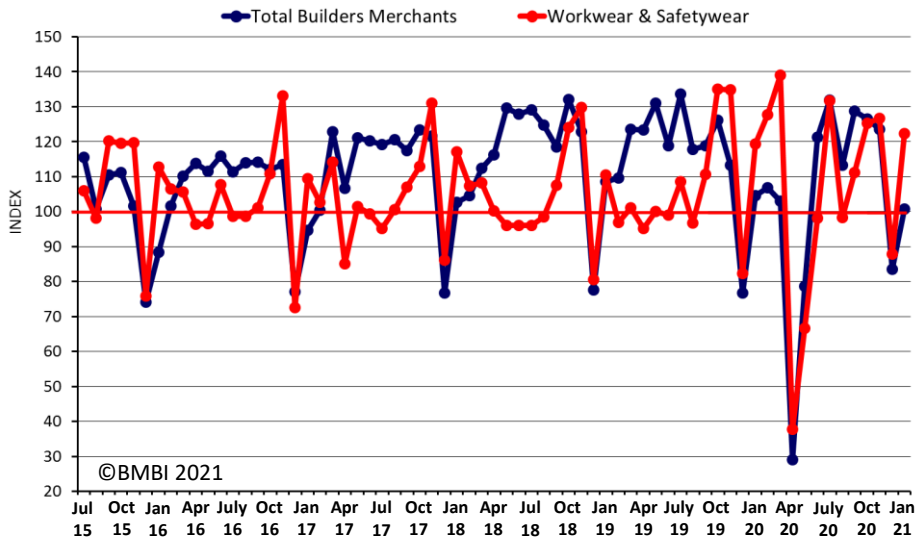
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Indices

January 2021

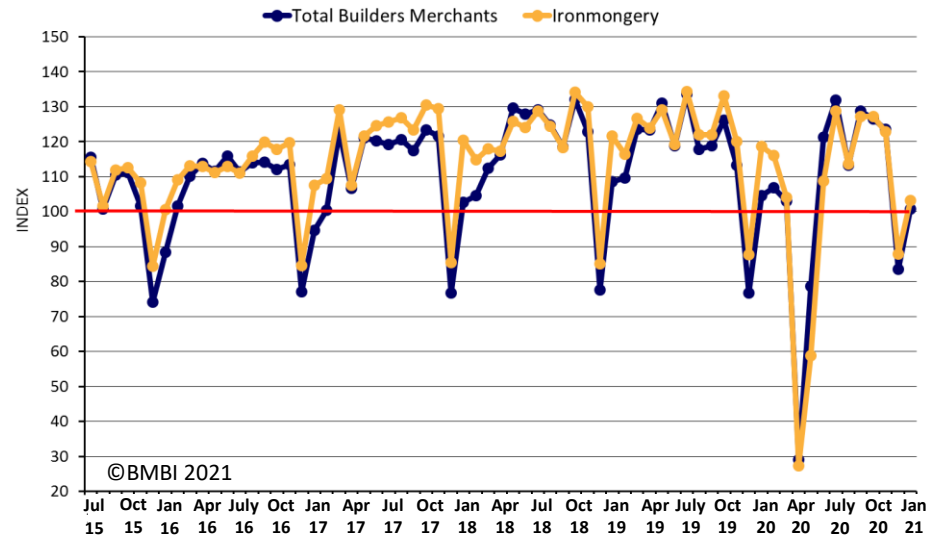


## Workwear & Safetywear




Indexed on July 2014 – June 2015

## Ironmongery



Indexed on July 2014 – June 2015

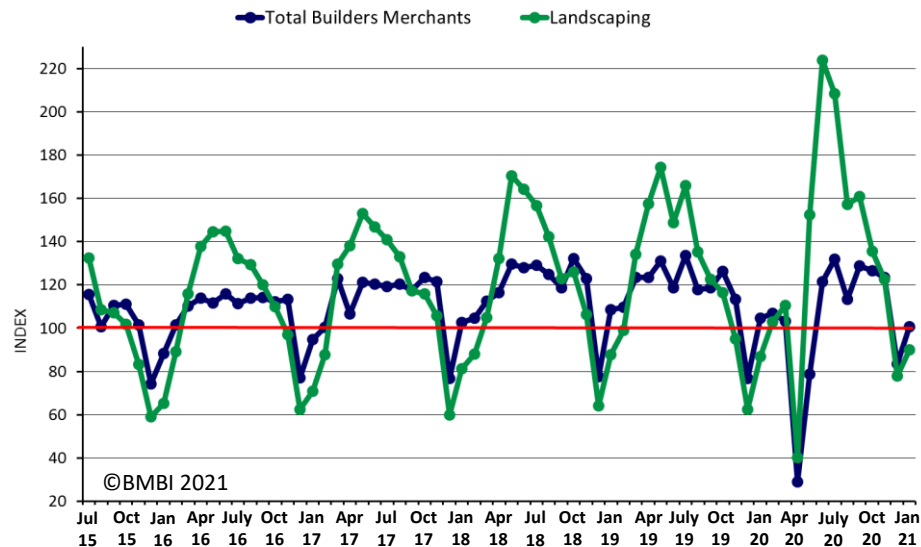
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Indices

January 2021

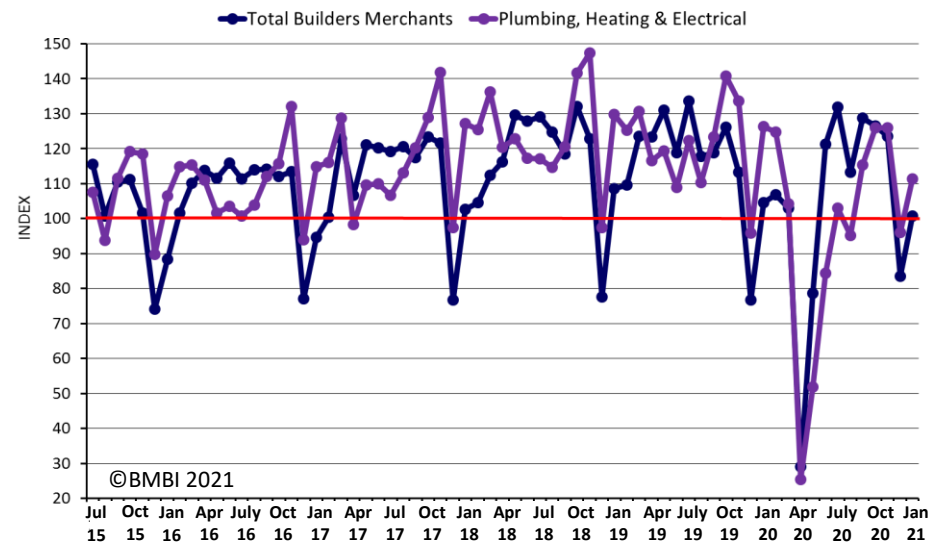


## Landscaping




Indexed on July 2014 – June 2015

## Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

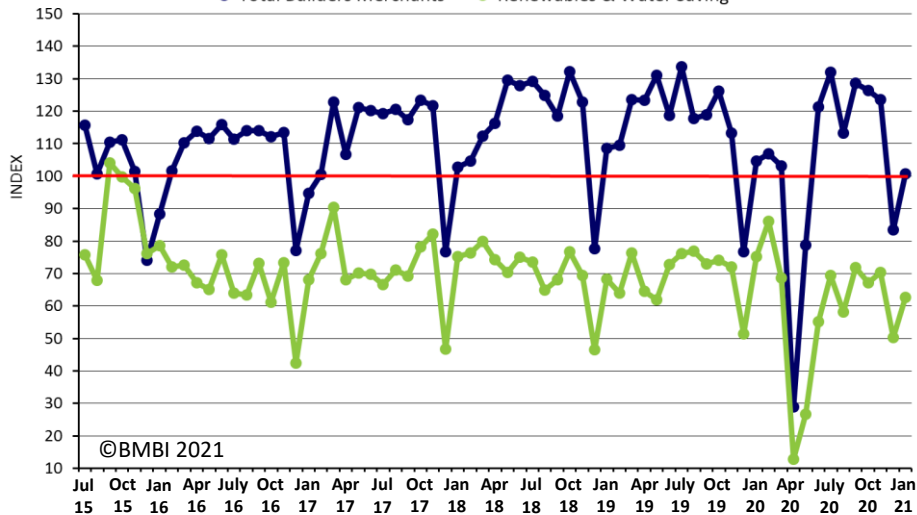
# Monthly: Indices

January 2021



## Renewables & Water Saving

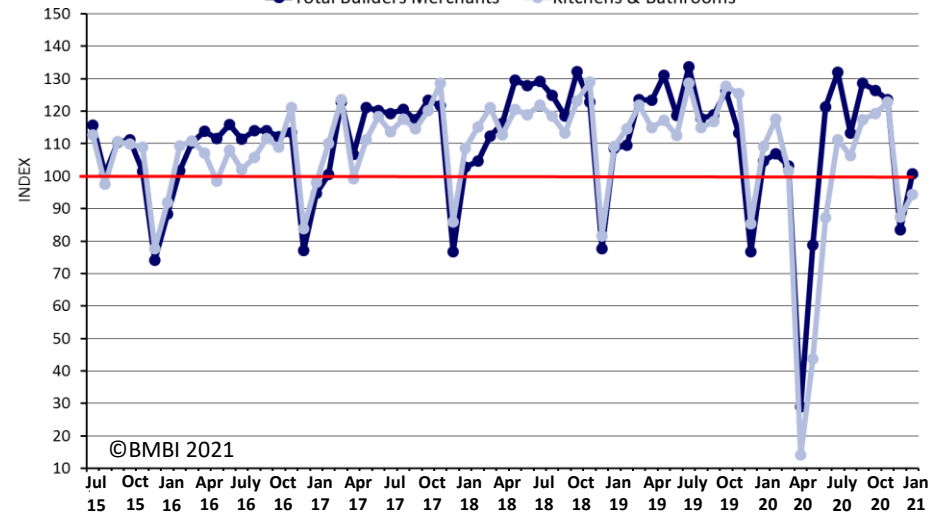
— Total Builders Merchants — Renewables & Water Saving




Indexed on July 2014 – June 2015

## Kitchens & Bathrooms

— Total Builders Merchants — Kitchens & Bathrooms



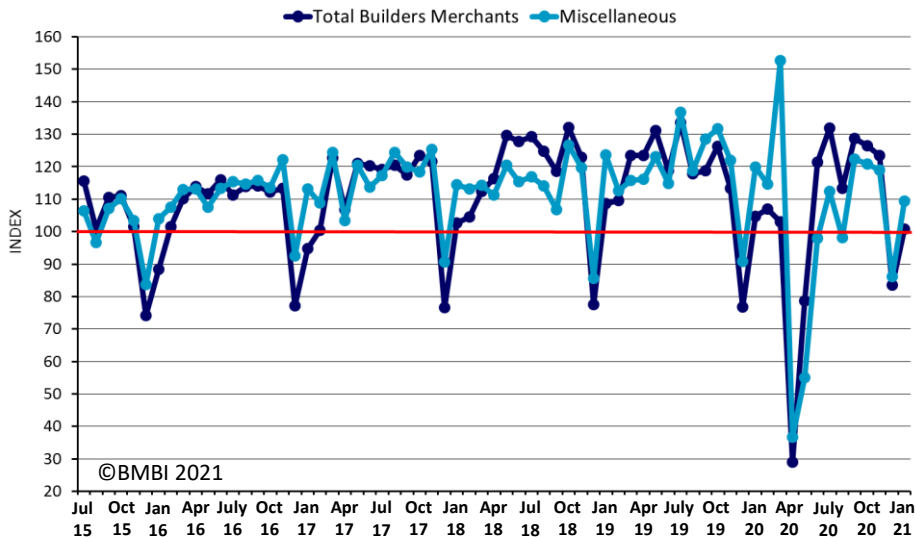
Indexed on July 2014 – June 2015

 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to January 2021

# Monthly: Indices

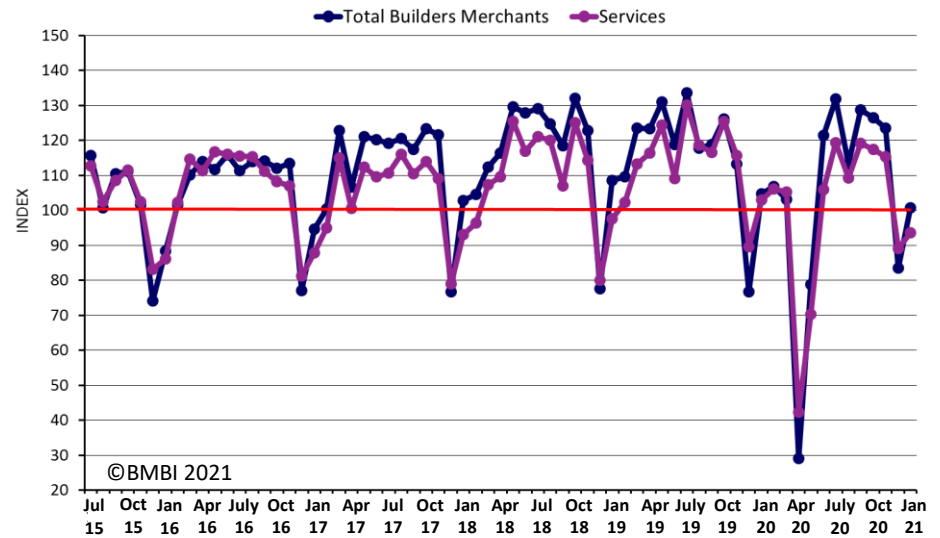
January 2021

## 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 January 2021



# 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 21	Dec 17
2021											
Jan 20	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

## Quarterly

Index: 62.3

2015			
		Q3 64	Q4 60
2016			
Q1 62	Q2 63	Q3 65	Q4 60
2017			
Q1 64	Q2 61	Q3 64	Q4 60
2018			
Q1 63	Q2 62	Q3 64	Q4 60
2019			
Q1 63	Q2 61	Q3 65	Q4 59
2020			
Q1 64	Q2 61	Q3 65	Q4 60
2021			
Q1	Q2	Q3	Q4

## Half Year

2015	
	H2 124
2016	
H1 125	H2 125
2017	
H1 125	H2 124
2018	
H1 125	H2 124
2019	
H1 124	H2 124
2020	
H1 125	H2 125
2021	
H1	H2

## Full Year

2016
250
2017
249
2018
249
2019
248
2020
250
2021

\*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.

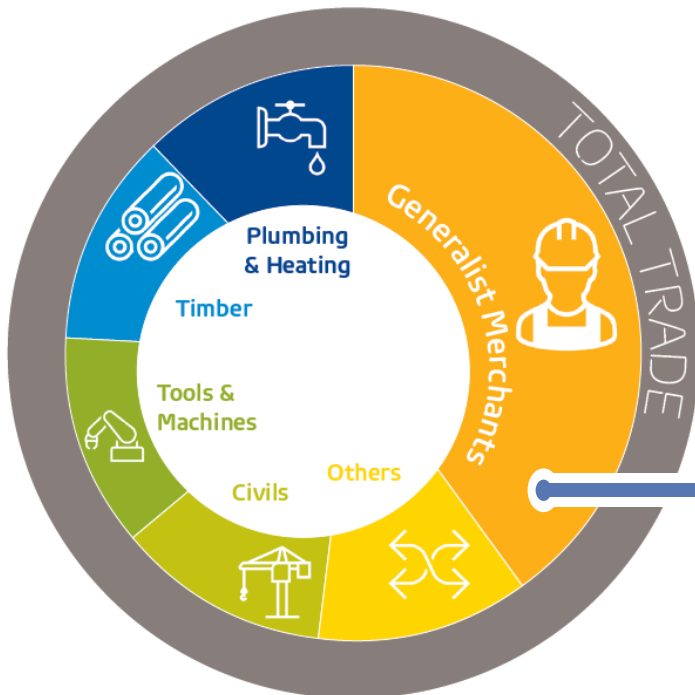
# GfK's Definition of Builders Merchant Panel



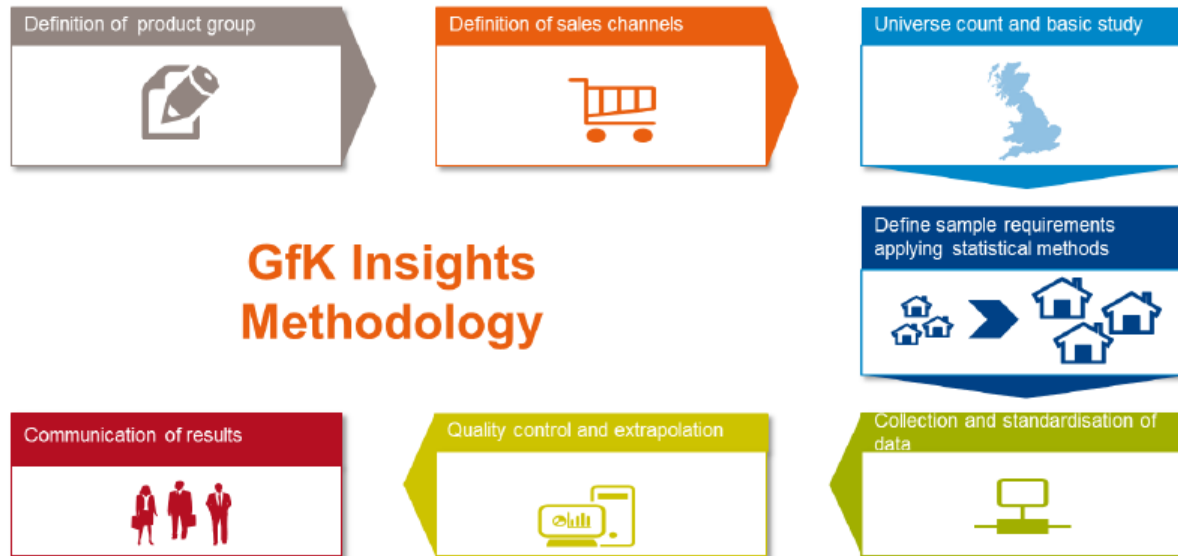
## Generalist Builders Merchants definition:

- 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. Only multiple merchants are considered; they are defined as having more than 3 outlets or a turnover of greater than £3m p.a.
- This excludes branches that generate all their sales from specialized areas such as Civils, Tiles and Tools. Estimated coverage of this channel sits at 82%.

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

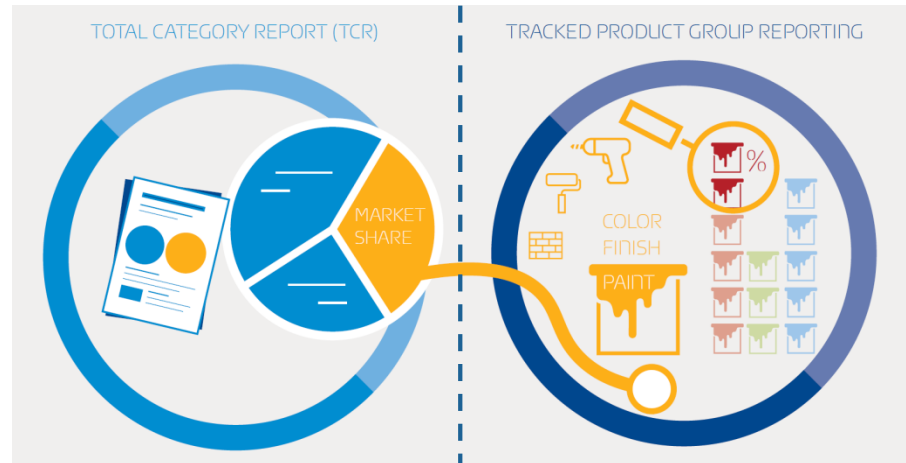
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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)

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**January 2021**

(Published 19 March 2021)

A Builders Merchant Building Index Publication

# Introduction:

## Plumbing & Heating Merchant Index



This Plumbing & Heating Merchant Index (PHMI) report contains data from GfK's ground-breaking Plumbing & Heating Merchants Panel, which analyses data from over 80% of Plumbing & Heating merchants' sales throughout Great Britain, accounting for about £3bn. There is no overlap or double counting between PHMI and Builders Merchant Building Index (BMBI).

GfK's Plumbing & Heating Point of Sale Tracking Data is 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 specialist plumbing & heating merchants. It is, in effect, the market.

PHMI trend data is indexed on the 12 months of 2019. Currently, data is available by total monthly value sales and the series tracks what is happening in the plumbing and heating market month by month. This trend series gives the industry access to far more accurate insights than has been available. MRA Research produces the Plumbing & Heating Merchant Index, a brand of the BMF, to provide reliable data, and a platform and voice for this important industry and for leading plumbing and heating brands to communicate to the wider market.

### PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts, speaking for their markets and building their brands, should contact Ralph Sutcliffe: [Ralph@mra-research.co.uk](mailto:Ralph@mra-research.co.uk) or Tom Rigby: [Tom@mra-research.co.uk](mailto:Tom@mra-research.co.uk)

### More data available

This PHMI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and 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 produce like-for-like market comparability tailored to the requirements of an individual business. 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).

## A mixed start to 2021 for plumbing and heating merchants

January 2021 plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were down 5.0% on January 2020. The start of Lockdown 3 may have impacted adversely on inside work and there were two less trading days this year. However, average sales a day in January, which take trading day differences into account, were 4.5% higher than in January last year. (See [page 50](#)).

Sales in January 2021 were 18.5% higher than in December, helped by three more trading days in January ([page 52](#)). Average sales a day were 0.7% higher.

The last three months (November 2020 to January 2021) saw sales 1.6% lower than in the same three months a year earlier, with no difference in trading days ([page 51](#)).

Comparing the same three months (November 2020 to January 2021) with the previous three months (August to October 2020) saw a larger fall of 3.2% ([page 53](#)). The potential impact on inside work of Lockdown 2 in November and Lockdown 3 in January may have contributed to the decline. However there were also six fewer trading days in the most recent period and taking these into account saw average sales a day 6.9% higher than in August to October.

January's PHMI Index, which contrasts sales with the base period of January to December 2019, was 99.4 – see the table on [page 48](#) and the chart on [page 49](#). The table also shows the PHMI Index in the last three months (November 2020 to January 2021) was marginally weaker, at 98.1, but with four less trading days.

January 2021 plumbing and heating product sales by plumbing and heating merchants, were down 5.0% on January 2020. The start of 'Lockdown 3' may have impacted adversely on inside work and there were two less trading days this year.

# Indices: Monthly and quarterly

February 2020 to January 2021

(Indexed on January to December 2019)

<b>Feb 20</b>	<b>Mar 20</b>	<b>Apr 20</b>	<b>Three months</b>
101.1	93.8	34.8	76.6
<b>May 20</b>	<b>Jun 20</b>	<b>Jul 20</b>	<b>Three months</b>
46.0	73.4	88.3	69.2
<b>Aug 20</b>	<b>Sep 20</b>	<b>Oct 20</b>	<b>Three months</b>
85.9	103.0	115.2	101.3
<b>Nov 20</b>	<b>Dec 20</b>	<b>Jan 21</b>	<b>Three months</b>
111.1	83.9	99.4	98.1

Indices are a measure that express sales values relative to a fixed base, enabling rapid performance comparisons to be made. The Plumbing & Heating Merchant Index uses total sales in 2019 to create monthly and quarterly base periods. These represent average performance.

The figures above express how the periods compare with the 2019 base:

- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, October's index of 115.2 means turnover was 15.2% above the base period.
- Values below 100 indicate lower turnover in that period. May's Index of 46.0 means turnover was 54.0% lower than the base period.

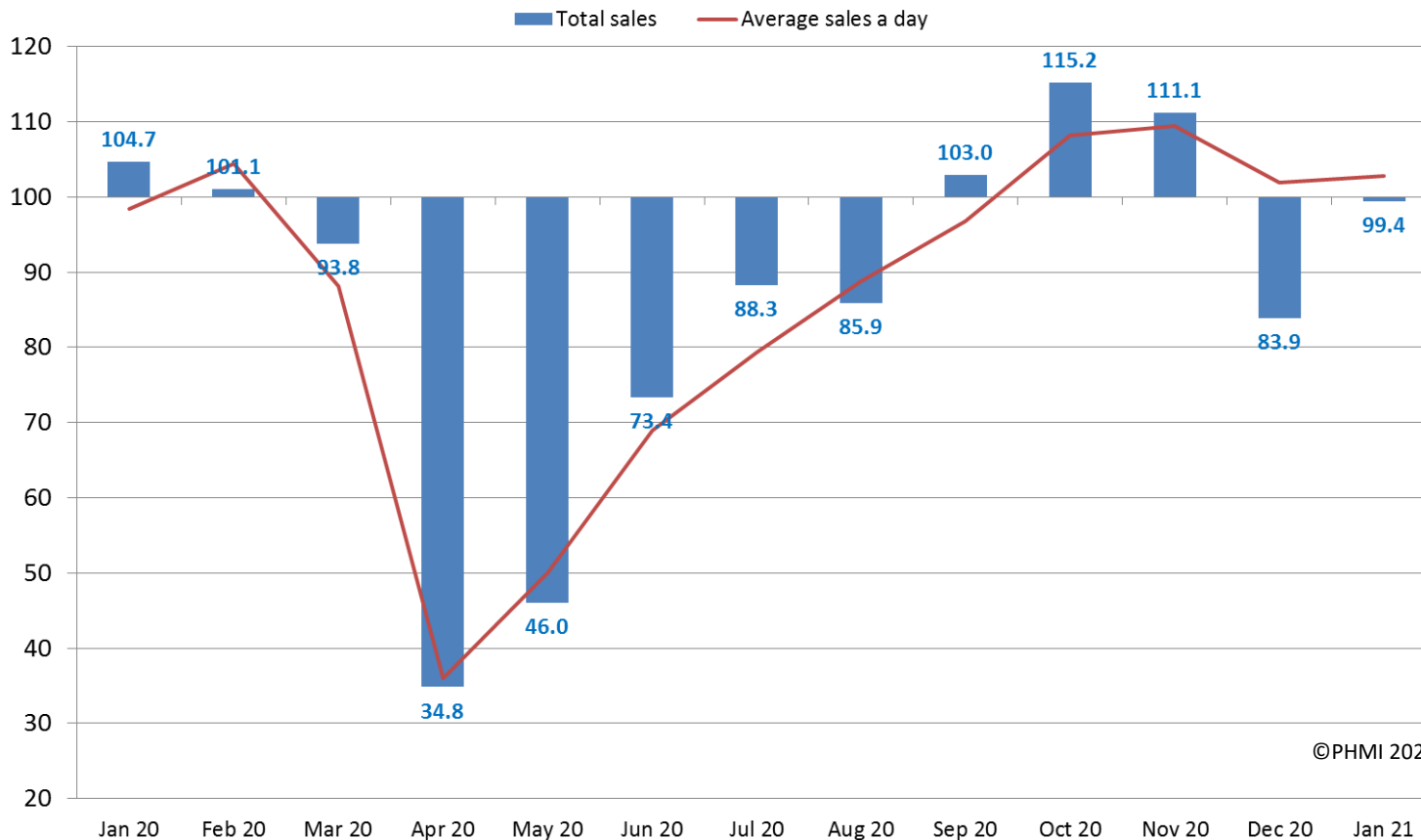
 **Source:** GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Jan 2021



# Monthly: Index


Adjusted and unadjusted for trading days\*

## Indices: January 2020 to January 2021



Value figures  
shown for Total  
sales

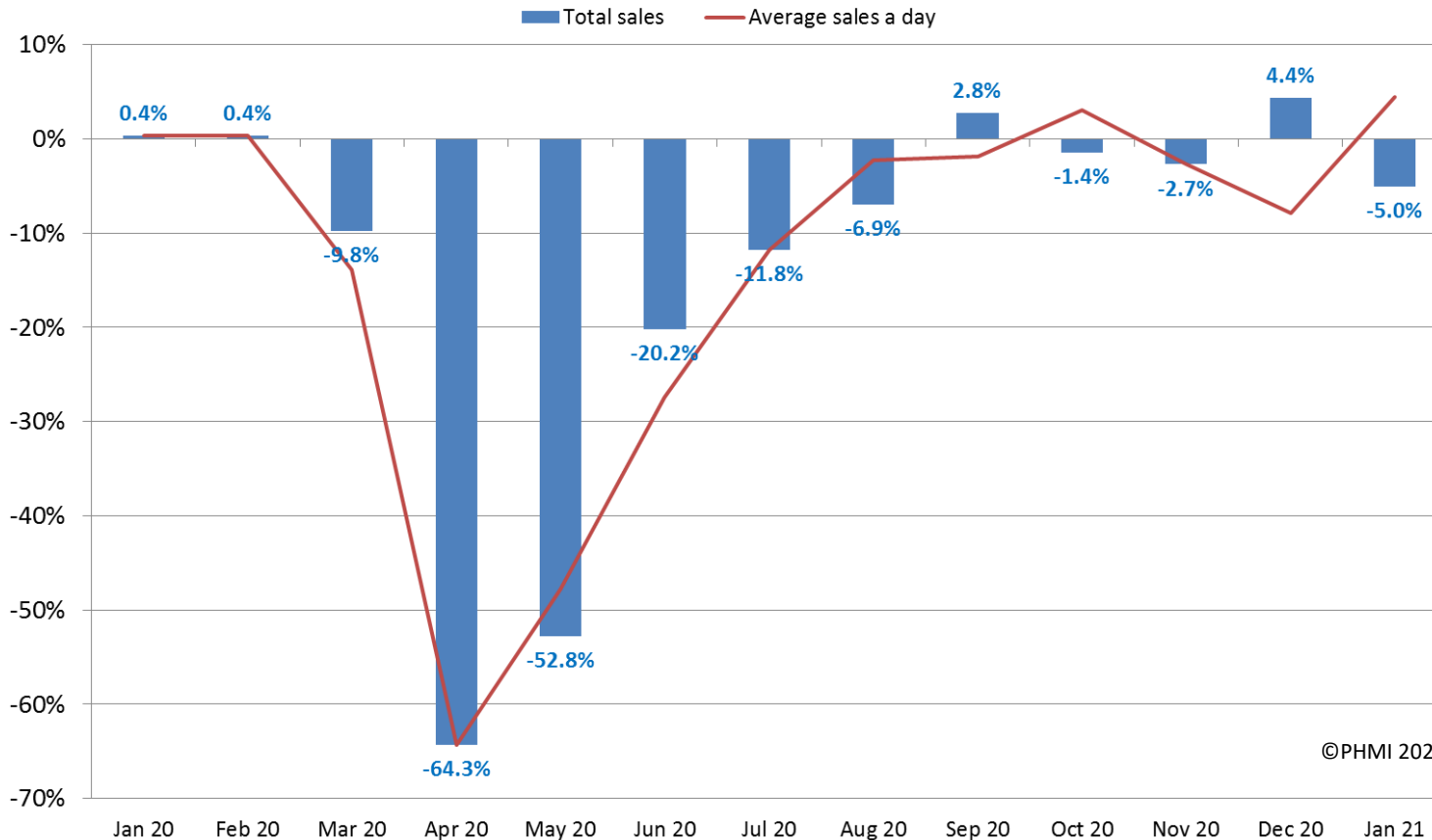
©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Jan 2021

# Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted  
for trading days\*

## Month: year on year



Value figures  
shown for Total  
sales

©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Jan 2021

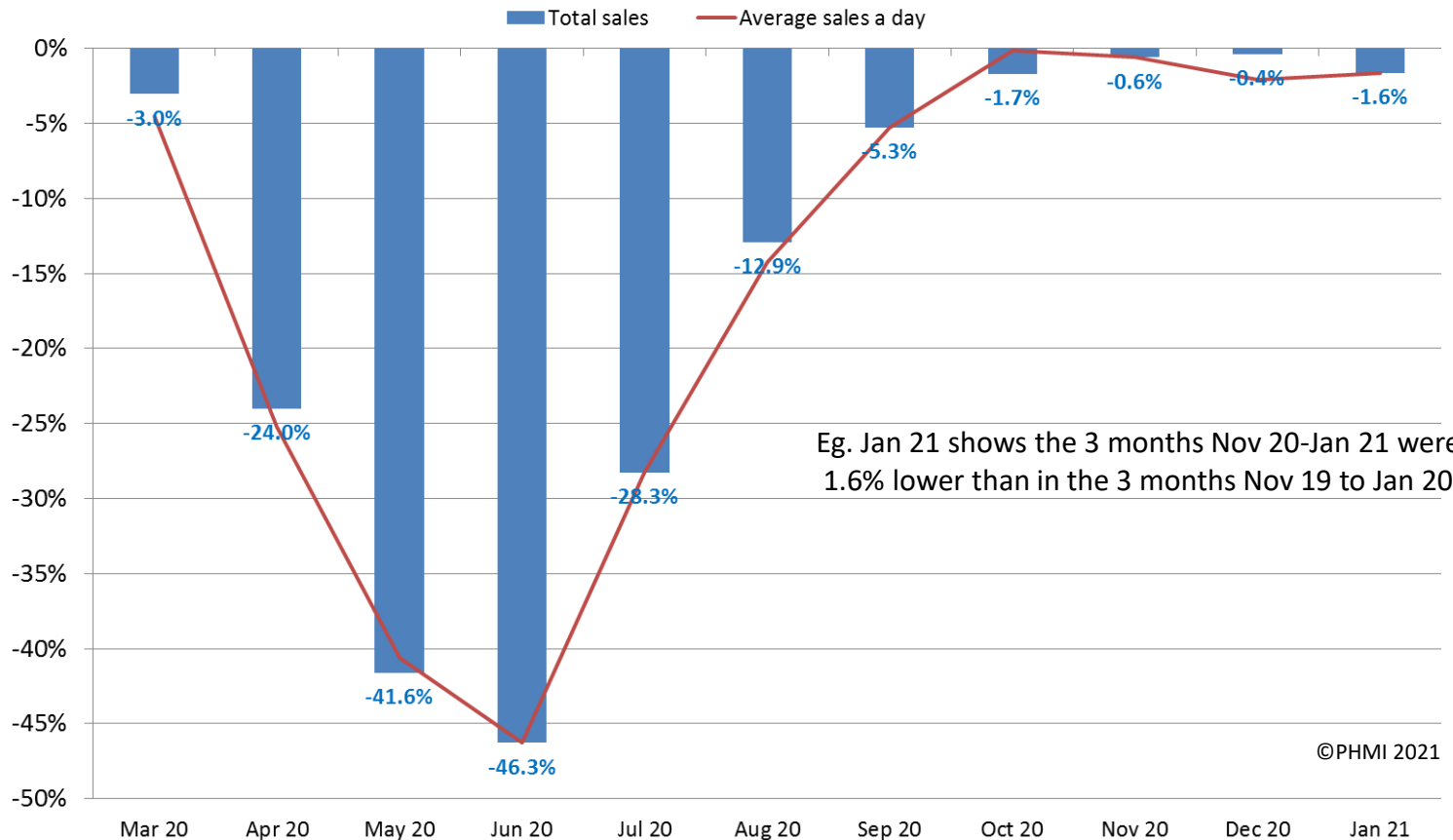
# Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index




## Rolling 3 months: year on year



Value figures  
shown for Total  
sales

Eg. Jan 21 shows the 3 months Nov 20-Jan 21 were  
1.6% lower than in the 3 months Nov 19 to Jan 20

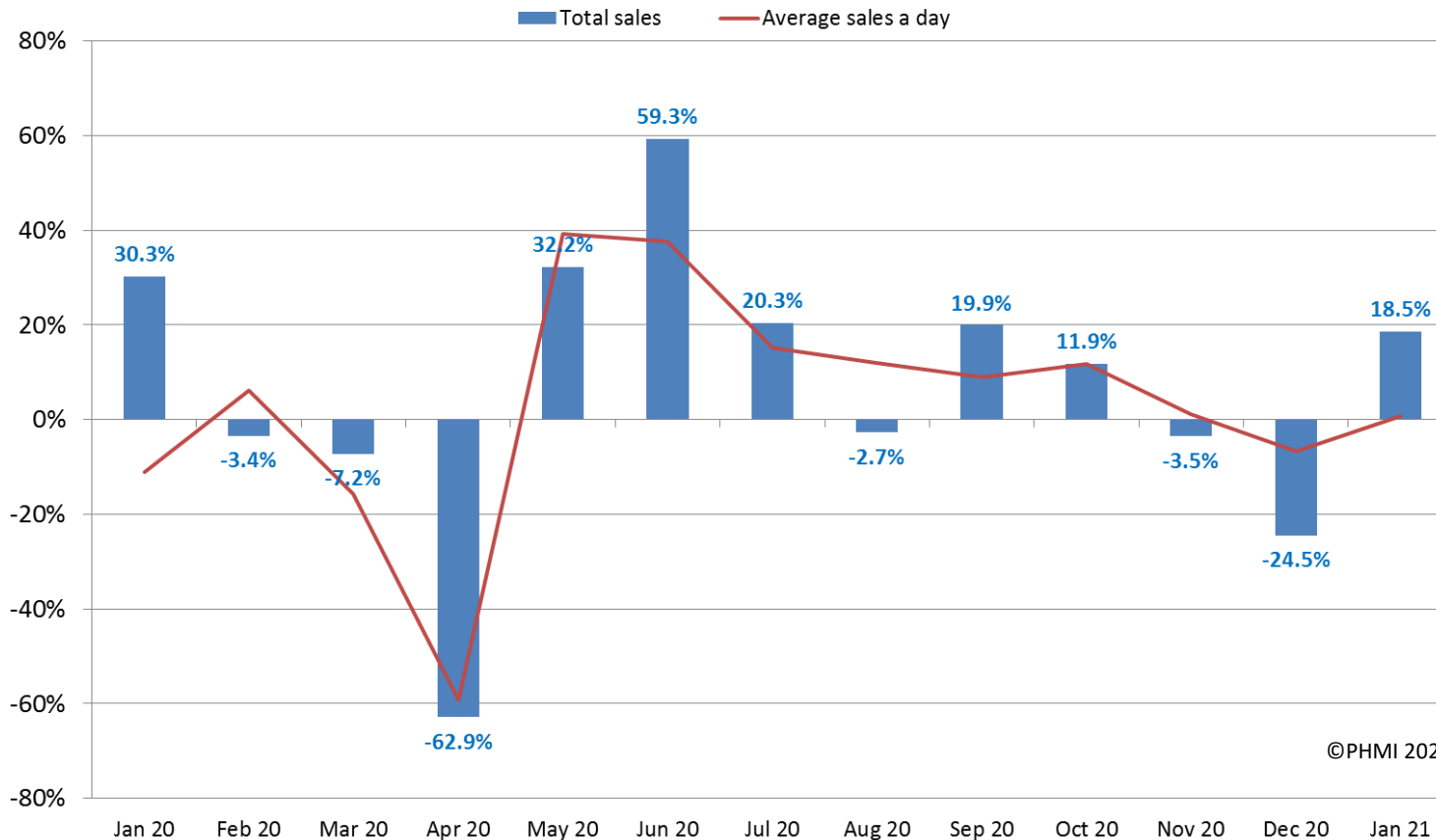
©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Jan 2021

# Monthly: Month v previous month


Sales indices, adjusted and unadjusted  
for trading days\*

## Month v previous month



Value figures  
shown for Total  
sales

©PHMI 2021

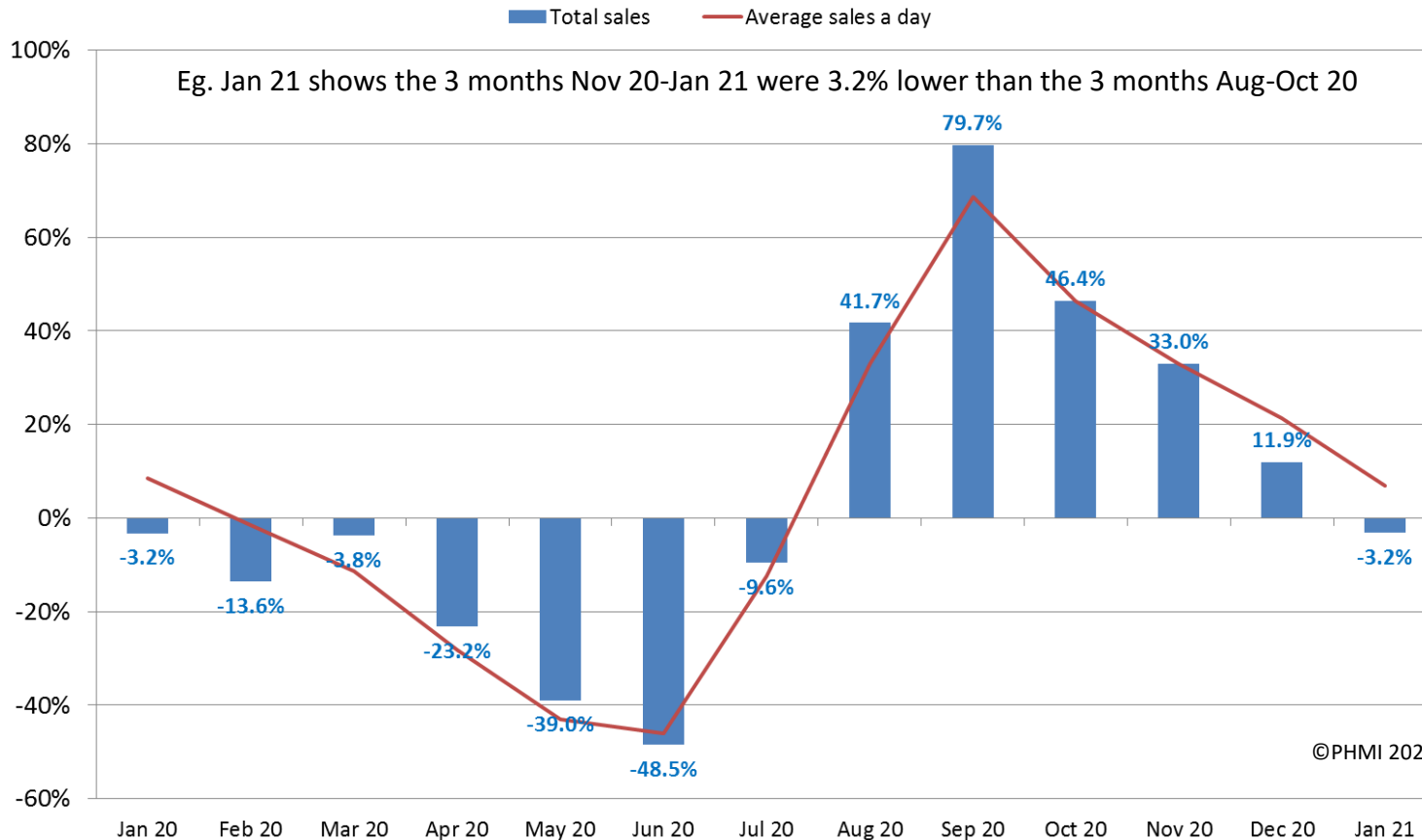
 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Jan 2021

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

# Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted for trading days\*

## Rolling 3 months v previous 3 months



Value figures shown for Total sales

©PHMI 2021

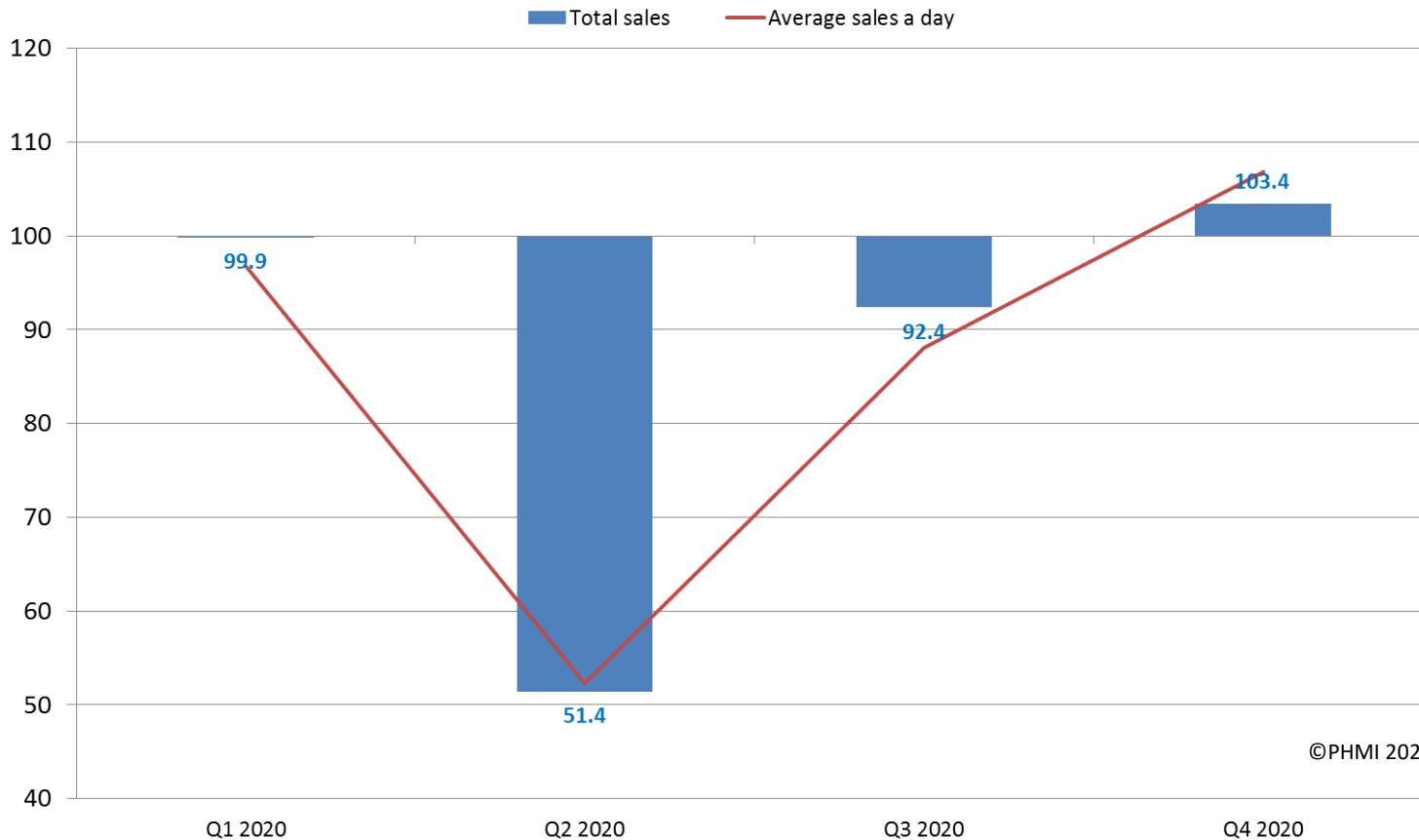
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Jan 2021

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

# Quarterly: Index

Adjusted and unadjusted for trading days

## Indices: Q1 2020 to Q4 2020



Value figures  
shown for Total  
sales

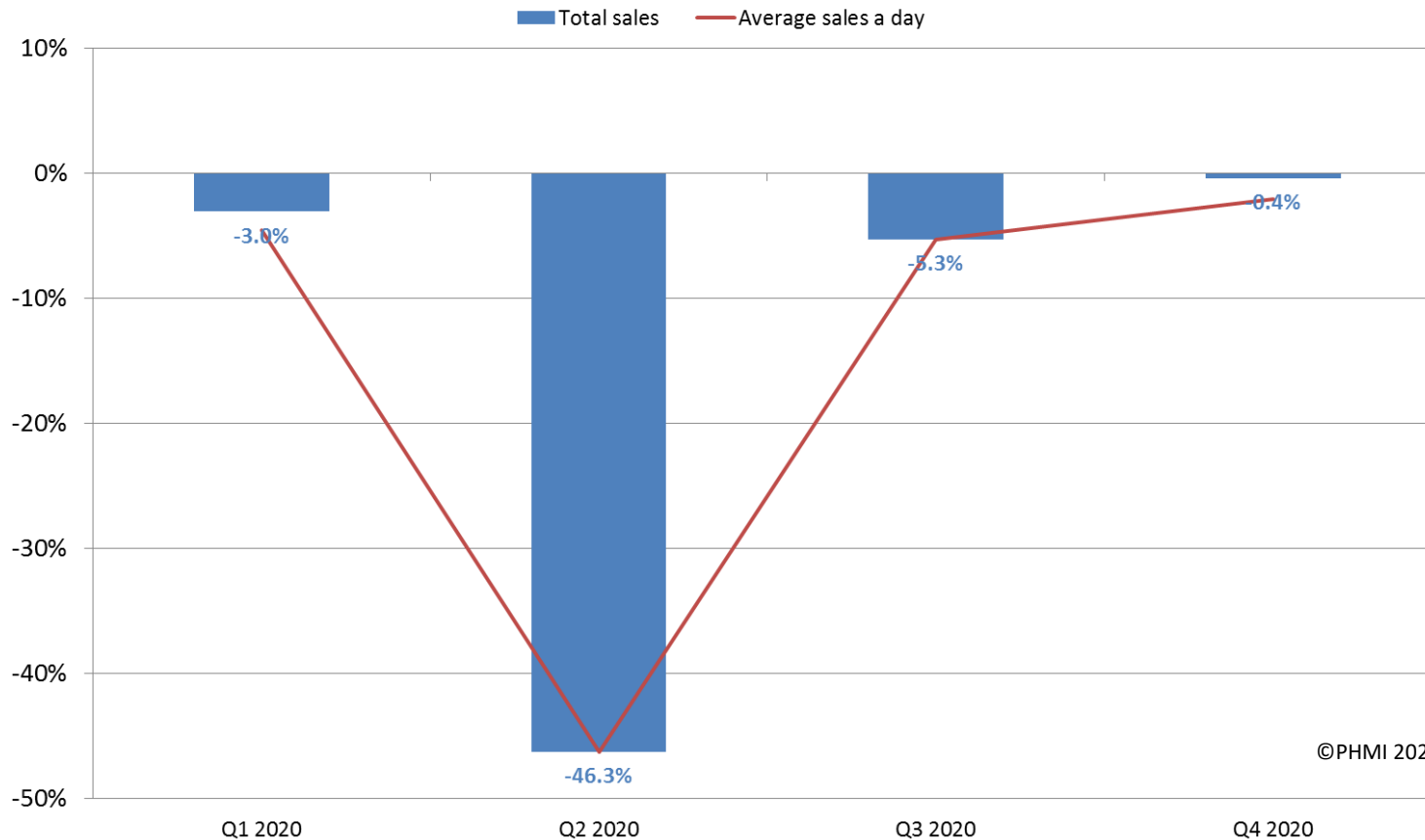
©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Dec 2020

# Quarterly: This Year v Last Year

Sales indices, adjusted and unadjusted  
for trading days\*

## Quarter: year on year



Value figures  
shown for Total  
sales

©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Dec 2020

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

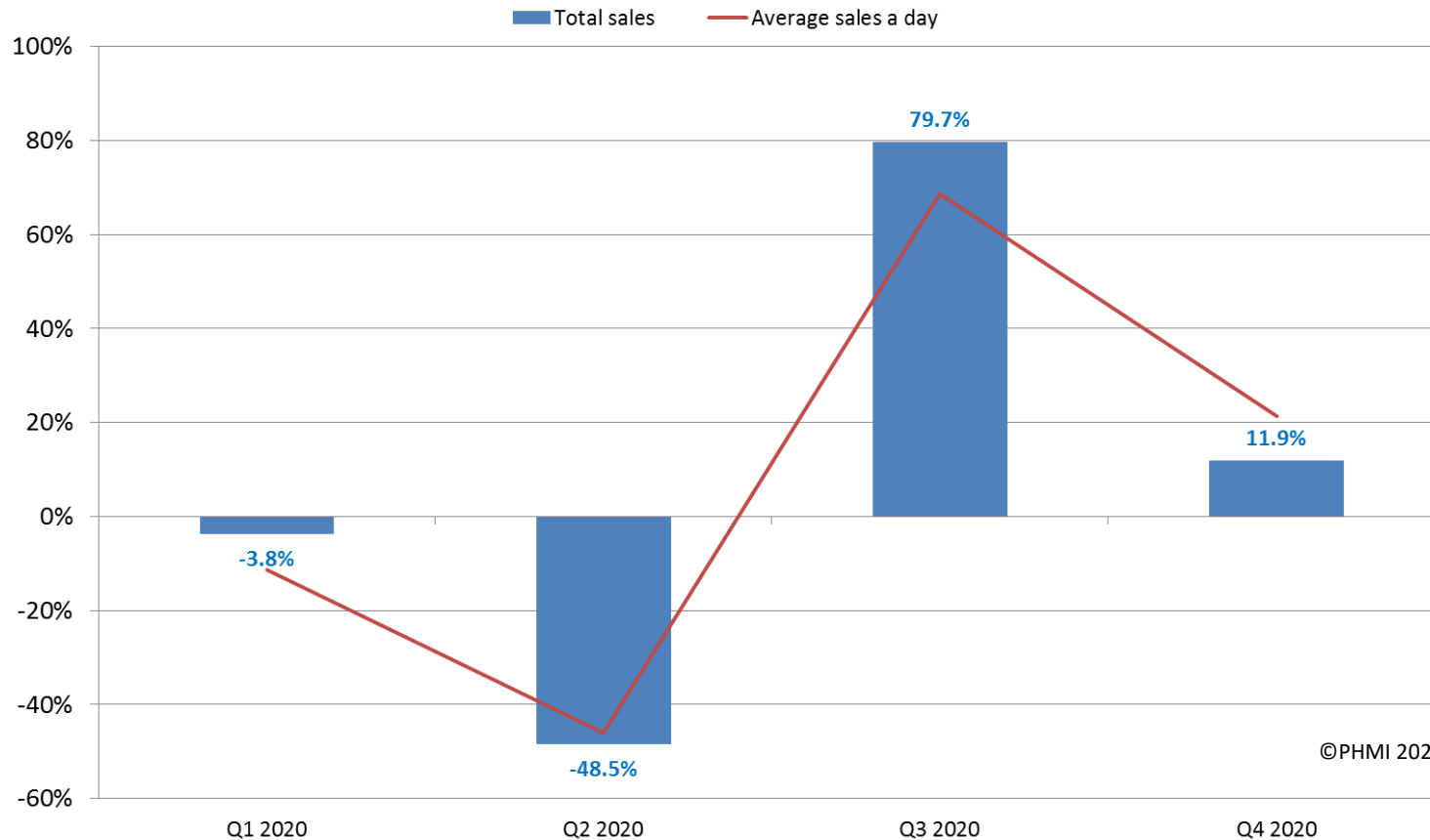
# Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted  
for trading days

Plumbing & Heating  
Merchant Index



## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Dec 2020



# PHMI Trading Days

## Monthly

Index: 20.8

2020											
Jan	Feb	Mar*	Apr*	May*	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20											

## Quarterly

Index: 62.3

2020			
Q1	Q2	Q3	Q4
64	61	65	60
2021			
Q1	Q2	Q3	Q4

## Half Year

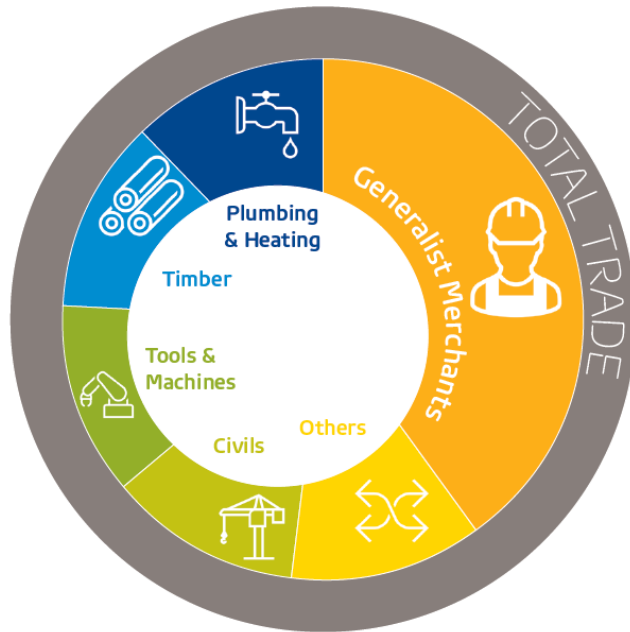
2020	
H1	H2
125	125
2021	
H1	H2

## Full Year

2020
250
2021

\*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.

# Plumbing & Heating channel definition and merchants



## Plumbing Specialists

Plumbing & Hardware Specialists are small outlets handling nails, hardware products, pipes, ironware, paint, faucets, sanitary products, bathroom accessories, ceramic tiles and heating equipment such as boilers, radiators & heating controls.

Their main turnover is generated with product groups such as installation, paint & plumbing/hardware product groups (e.g. nails, saws, scissors, keys).

## Plumbing Merchants

Large outlets handling nails, hardware products, pipes, ironware, paint, faucets, sanitary products, bathroom accessories & kitchen, bathroom furniture, bath tubs and heating equipment such as boilers, radiators & heating controls. Compared with Plumbing Specialists they are bigger & generate a higher turnover.

Their main turnover is generated with bath/kitchen faucets, sanitary & complementary products, bathroom accessories, tiles and bath tubs and bathroom furniture.

Turnover is generated with professional end users (B2B) as well as private end users (B2C).

Merchant partners include:



Plumbing Trade Supplies



# Contacting PHMI

## PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts and speaking for their markets and building their brands should contact Tom Rigby or Ralph Sutcliffe :



**Tom Rigby**

Commercial Manager

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

+44 (0) 7392 081276



**Ralph Sutcliffe**

Business Development  
Director

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

+44 (0) 1453 521621

## More data available

The PHMI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and 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 produce like-for-like market comparability tailored to the requirements of an individual business. Merchants or suppliers who are interested in acquiring data or getting involved should contact Emile van der Ryst:



**Emile van der Ryst**

Senior Client Insight Manager -  
Trade

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

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in materials supply”



## BMF Forecast Report

# BMF Forecast Report

## Spring 2021 edition



### Builders Merchants Industry Forecast Report

The BMF has released the seventh edition of its Builders Merchants Industry Forecast, covering 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 Spring 2021 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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# Contact us

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