

“building **excellence**
in materials supply”

Including
**Plumbing & Heating
Merchant Index**
See page 51

Builders Merchant Building Index



Monthly report for August 2021

(Published 19 October 2021)

Building the Industry & Building Brands from Knowledge



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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: West Fraser (formerly known as Norbord), Pavestone UK Ltd, eCommonSense, British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Hanson Cement, Keystone Lintels, Knauf Insulation, Dulux Trade, Lakes and Bostik UK. 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.

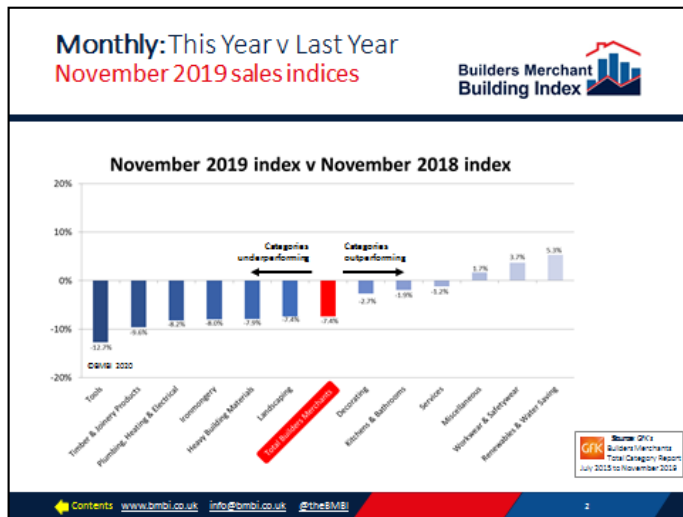
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

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.

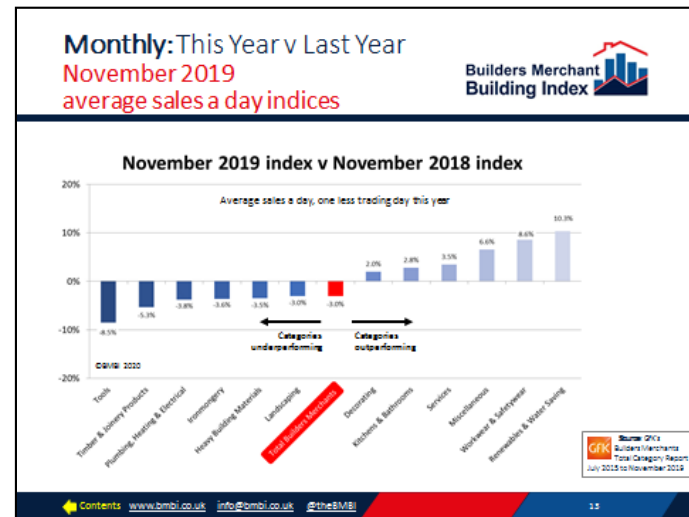
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

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. In the example above from November 2019, 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, while 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 and show like-for-like comparisons.

Very strong growth in Timber & Joinery Products, many other categories grew strongly too

Total Builders Merchants August 2021 value sales were up 23.0% compared with the same month last year, with one more trading day this year. Eleven of the twelve categories sold more. Timber & Joinery Products (+51.5%) did best, recording its third-highest ever monthly BMBI sales. Other categories saw good but slower growth, including Heavy Building Materials (+16.9%), Landscaping (+11.5%) and Kitchens & Bathrooms (+11.3%). Only Workwear & Safetywear (-2.7%) sold less this year. Overall average sales a day, which take trading day differences into account and provide a like-for-like comparison, were 17.1% higher than in August 2020.

August 2021 v August 2019

Compared with two years ago, Total Merchants sales were up 18.2% in August 2021, with no difference in trading days. As in July, this growth was mainly driven by two categories: Timber & Joinery Products (+48.4%) and Landscaping (+29.7%). Only three other categories achieved higher 2-year sales: largest category, Heavy Building Materials (+10.1%), Services (+9.7%) and Kitchens & Bathrooms (+2.9%). The other seven categories sold less, including Plumbing Heating & Electrical (-0.6%), Tools (-1.5%) and Decorating (-3.1%).

Month-on-Month

Total Merchants sales were 7.9% lower in August than in July, with no difference in trading days. Only Workwear & Safetywear (+3.1%) sold more. Categories selling less included Plumbing Heating & Electrical (-3.6%), Kitchens & Bathrooms (-6.5%), Heavy Building Materials (-7.2%) and Timber & Joinery Products (-8.6%). Landscaping (-14.4%) was weakest.

Last three months, year on year

Total sales in the three months June to August 2021 were 22.1% up on the same period last year, with one less trading day this year. Eleven of the twelve categories sold more. Timber & Joinery Products (+50.2%) was especially strong, followed by Plumbing Heating & Electrical (+22.8%). Kitchens & Bathrooms (21.4%), Heavy Building Materials (+16.0%), Decorating (+10.9%) also grew strongly. Landscaping increased +4.4%. Only Workwear & Safetywear (-8.5%) sold less. Overall like-for-like sales increased by 24.0%.

Last 3 months v 2019

Compared with two years ago, total sales in the latest three months were 20.9% higher than in June to August 2019, with no difference in trading days. Two categories did particularly well: Timber & Joinery Products (+50.7%) and Landscaping (+36.7%). Five categories grew more slowly, including Heavy Building Materials (+12.2%) and Kitchens & Bathrooms (+3.9%). The remaining five product channels all sold slightly less, with Miscellaneous (-3.3%) weakest.

Overview continues on the next page...

Total Builders Merchants August 2021 value sales were up 23.0% compared with the same month last year. Eleven of the twelve categories sold more. Timber & Joinery Products (+51.5%) did best, with much stronger growth than other sectors.

Overview - 2

...Overview continued from the previous page:

Last 3 months v previous 3 months

Total sales in June to August were 0.8% higher than in March to May, with two more trading days in the most recent period. Three categories sold more, led by Timber & Joinery Products (+10.8%) and Kitchens & Bathrooms (+7.0%). The remaining nine categories sold less, including Heavy Building Materials (-0.2%), Plumbing Heating & Electrical (-6.0%) and Tools (-11.6%). Landscaping (-12.1%) was weakest. Like-for-like sales across all merchants were 2.4% lower than in March to May.

Year to date, year on year

Total Merchants January to August 2021 sales were up 39.6% compared with Covid-affected January to August 2020 and all categories sold more. There were two less trading days this year. Timber & Joinery (+65.3) was the top-performer, followed by Tools (+41.3%) and Landscaping (+40.2%). Other categories also grew strongly: Kitchens & Bathrooms (+32.8), Plumbing Heating & Electrical (+32.5%), Heavy Building Materials (+31.9%) and Ironmongery (+30.0%). Only Workwear & Safetywear (+4.1%) failed to achieve double-digit growth. Total like-for-like sales were 41.3% higher.

Year to date v 2019

Total sales in the eight months to August 2021 were up 14.0% on January to August 2019, with two less trading days this year. Seven of the twelve categories sold more. Landscaping (+37.6%) and Timber & Joinery Products (+33.4%) did best. Heavy Building Materials (+6.9%) and Workwear & Safetywear (+5.4%) grew more slowly. Of five categories selling less, Decorating (-2.6%) was weakest. Overall like-for-like sales were 15.4% higher this year.

MAT

Total Merchants sales in September 2020 to August 2021 were 27.8% higher than in the same 12 months a year earlier, with no difference in trading days. All categories sold more. Timber & Joinery Products (+46.3%) and Landscaping (+36.2%) dominated. But Tools (+24.6%) and Heavy Building Materials (+22.4%) were also strong. Workwear & Safetywear (+1.7%) had the lowest growth.

Index

August's overall BMBI index was 139.3, helped by strong performances from Timber & Joinery Products (182.6) and Landscaping (175.3). Seven other categories recorded indices exceeding 100, including Heavy Building Materials (127.0), Ironmongery (120.2) and Kitchens & Bathrooms (118.3). Weakest were Workwear & Safetywear (95.7), Tools (93.6) and Renewables (70.6).

Sales in the eight months to August 2021 were up 39.6% on January to August 2020. Timber & Joinery Products (+65.3%) did best. Looking back two years, total sales increased by 14.0% compared with January to August 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 Q2 2021 report, which includes commentary from our experts is available [here](#)

Meet the Builders Merchant Building Index Experts here and on the next page:

Expert for Drylining Systems:



Stacey Temprell,
Marketing Director
British Gypsum

[Read latest comment: Q2 2021 Report](#)

Expert for Bricks & Roof Tiles:



Kevin Tolson,
Commercial Director
Wienerberger UK

[Read latest Comment: Q2 2021 Report](#)

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

[Read latest Comment: Q2 2021 Report](#)

Expert for Civils & Green Infrastructure:



Steve Durdant-Hollamby,
Managing Director
Polypipe Civils

[Read latest Comment: Q2 2021 Report](#)

Expert for Lead:



Lynn Street
Sales & Marketing Manager
Midland Lead

[Read latest Comment: Q2 2021 Report](#)

Expert for Wood-Based Panels:



Simon Woods, European Sales Marketing
& Logistics Director
West Fraser (formerly known as Norbord)

[Read latest Comment: Q2 2021 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q2 2021 Report](#)

Expert for PVC-U Windows & Doors:



Kevin Morgan
Group Commercial Director
The Crystal Group

[Read latest Comment: Q2 2021 Report](#)

Expert for Shower Enclosures and Showering:



Mick Evans
Operations Director
Lakes

[Read latest Comment: Q2 2021 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q2 2021 Report](#)

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Hanson Cement

[Read latest Comment: Q2 2021 Report](#)

Expert for Paint:



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

[Read latest Comment: Q2 2021 Report](#)

Expert for Website & Product Data Management Solutions:



Andy Scothern
Managing Director
eCommonSense

[Read latest Comment: Q2 2021 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q2 2021 Report](#)

Expert for Adhesives & Sealants:



Mathew Whitehouse
Marketing Director
Bostik UK

[Read latest Comment: Q2 2021 Report](#)

Monthly: Index and Categories

August 2020* – August 2021

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



		2020					2021							
MONTHLY SALES VALUE INDEX	Index	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Total Builders Merchants	100	113.3	128.7	126.4	123.5	83.5	100.7	109.4	151.9	150.6	141.4	157.1	151.1	139.3
Timber & Joinery Products	100	120.6	139.3	141.1	139.9	95.2	120.0	128.8	175.7	176.3	173.2	199.6	199.8	182.6
Heavy Building Materials	100	108.6	125.4	122.8	119.4	78.1	95.9	102.0	141.3	137.4	128.6	142.8	136.8	127.0
Decorating	100	100.1	113.1	111.7	110.5	76.2	85.8	95.7	121.7	113.2	106.5	116.7	115.0	108.7
Tools	100	85.8	98.5	101.0	100.0	70.9	84.4	93.7	120.8	110.7	98.2	100.2	97.6	93.6
Workwear & Safetywear	100	98.4	111.1	125.2	126.7	87.9	122.3	111.3	118.2	104.0	95.8	111.8	92.8	95.7
Ironmongery	100	113.6	127.3	127.3	122.9	87.8	103.1	111.5	143.1	137.4	127.0	137.0	129.2	120.2
Landscaping	100	157.2	161.0	135.6	122.8	78.0	90.1	111.9	222.5	257.0	220.5	235.1	204.8	175.3
Plumbing, Heating & Electrical	100	95.3	115.4	126.0	125.9	96.1	111.3	120.3	137.1	119.2	112.9	123.7	113.7	109.7
Renewables & Water Saving	100	58.2	71.9	67.2	70.3	50.4	62.6	62.3	85.9	78.8	72.7	80.1	72.1	70.6
Kitchens & Bathrooms	100	106.3	117.3	119.3	122.7	87.4	94.4	107.4	120.7	113.5	111.5	125.1	126.5	118.3
Miscellaneous	100	98.2	122.3	120.8	118.9	86.1	109.4	107.1	131.2	126.2	111.2	120.3	121.6	116.2
Services	100	109.2	119.2	117.5	115.4	89.0	93.5	103.3	134.5	128.8	123.5	131.4	132.8	130.2

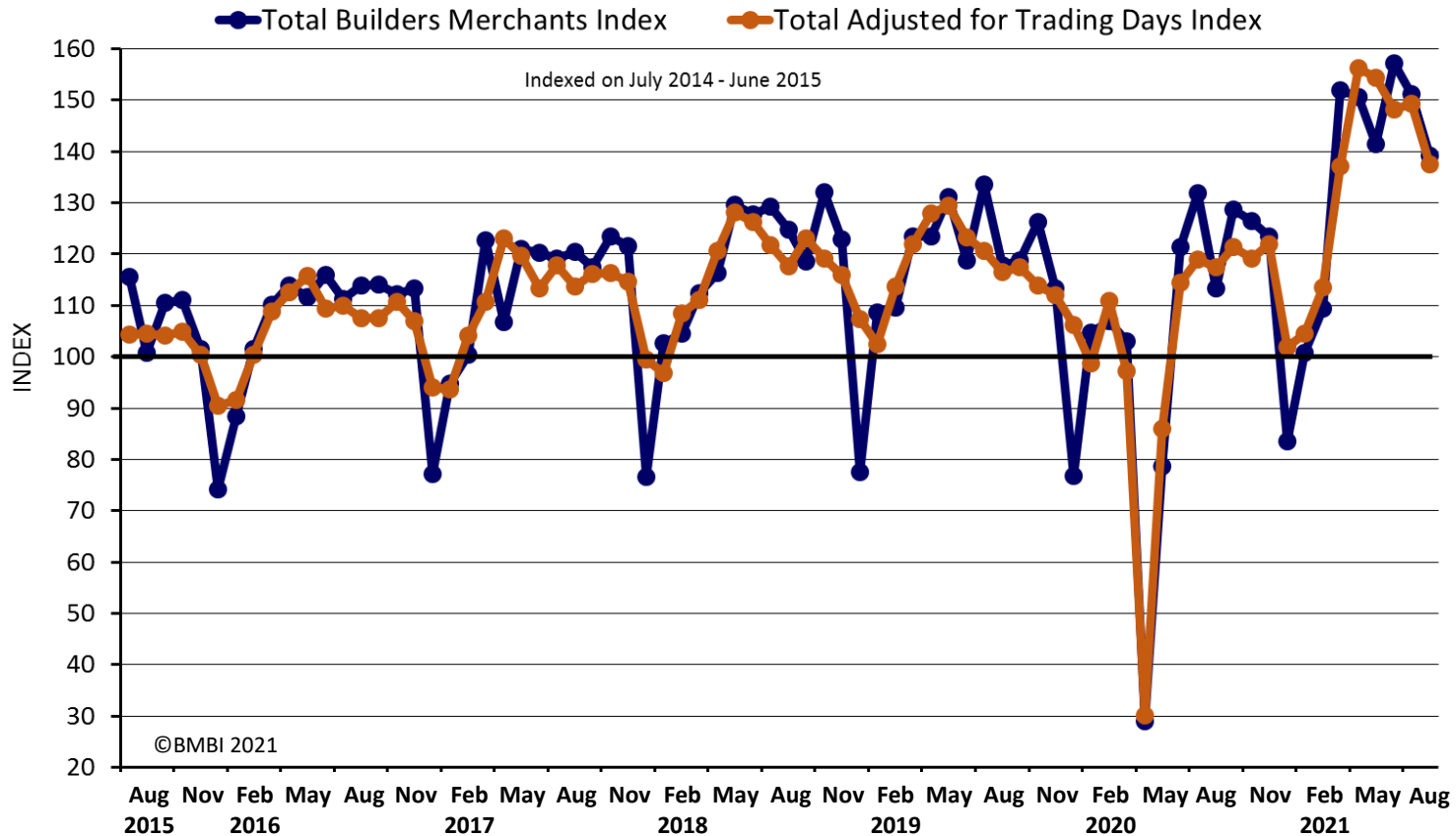
*Click the web link below to see the complete series of indices from July 2015.

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

Monthly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



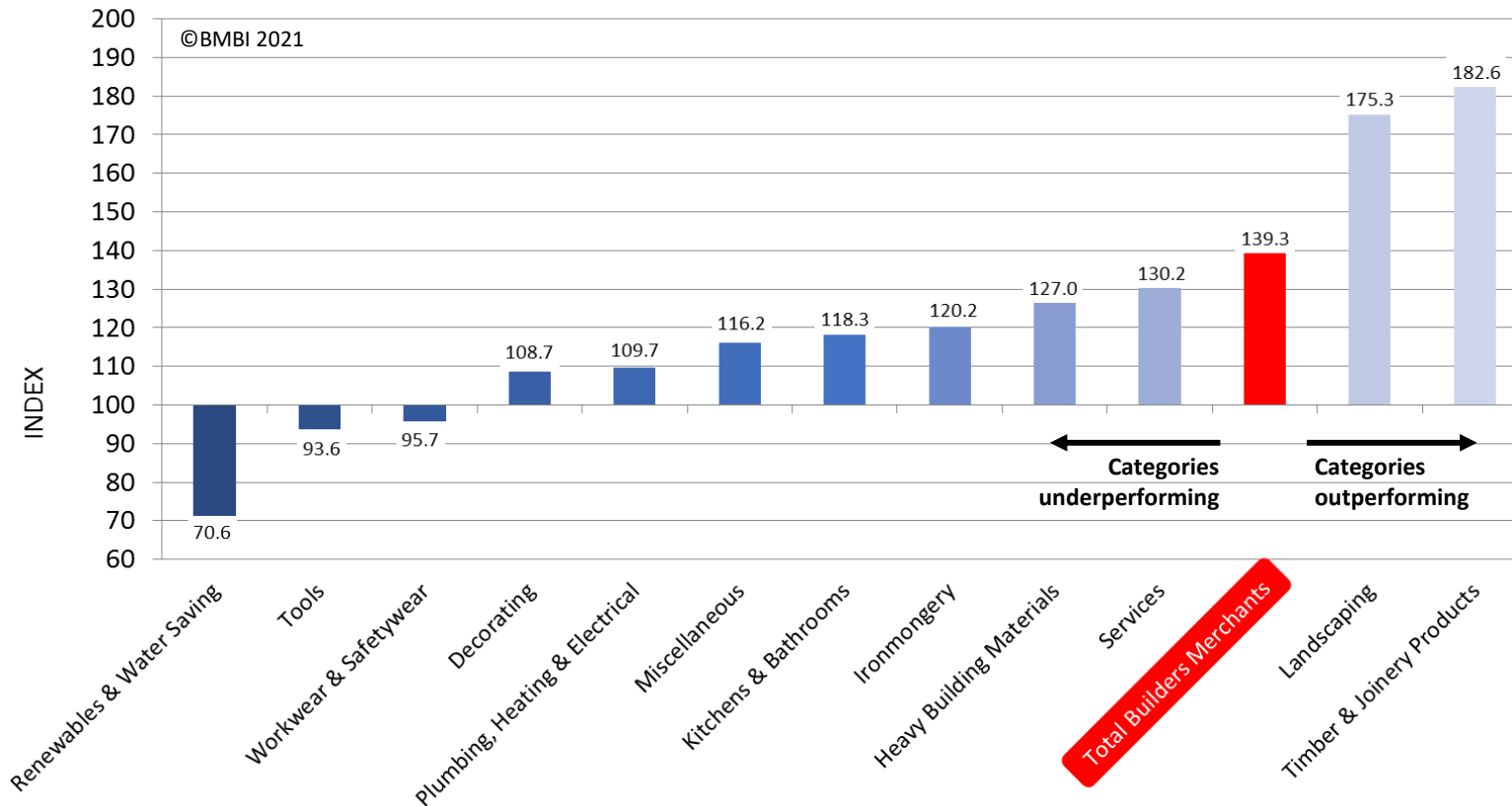
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: Index and Categories

August 2021 index



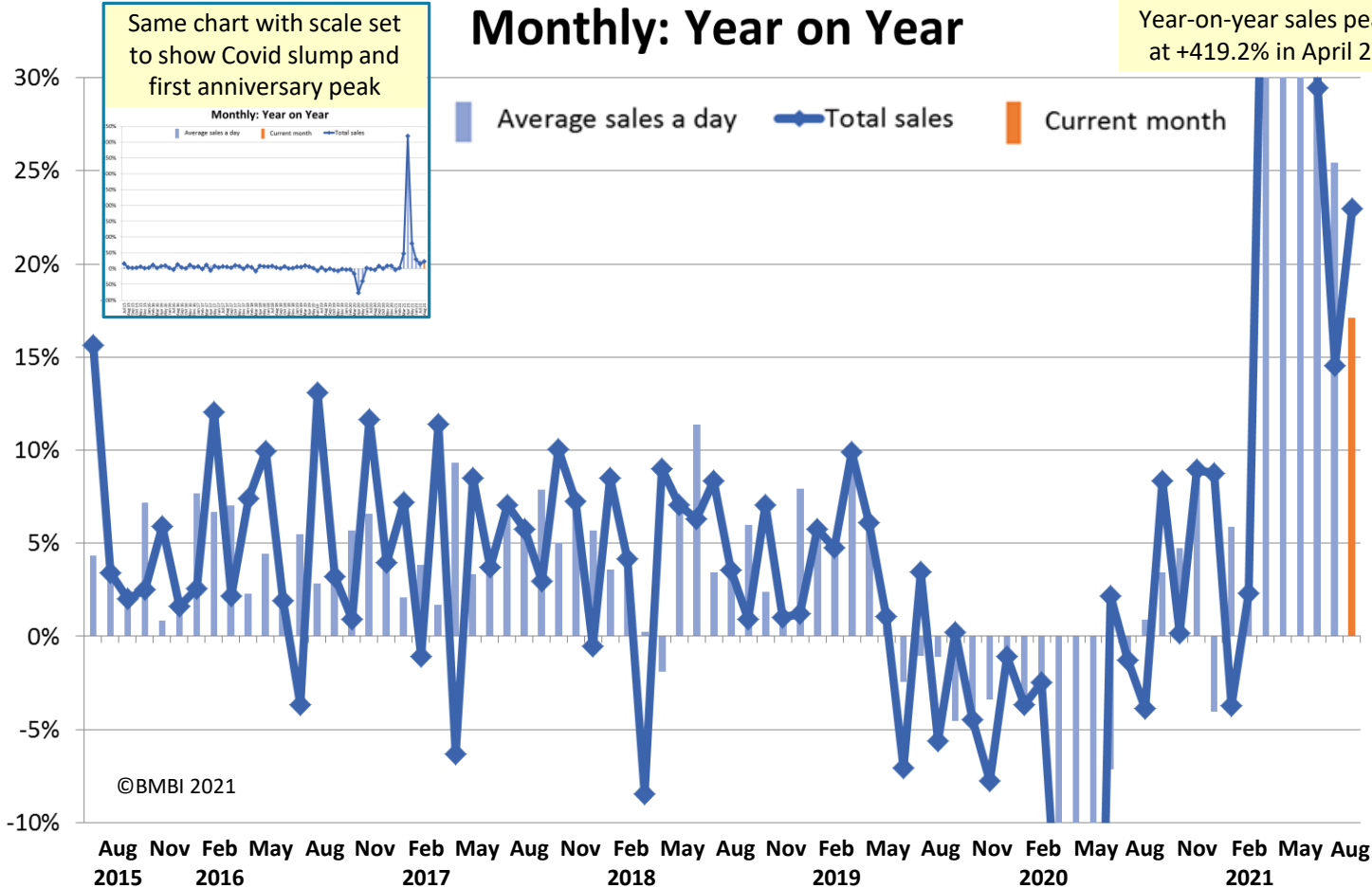
August 2021 Index



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

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



Year-on-year sales peaked at +419.2% in April 2021

Year-on-year sales slumped to -73.6% in April 2020

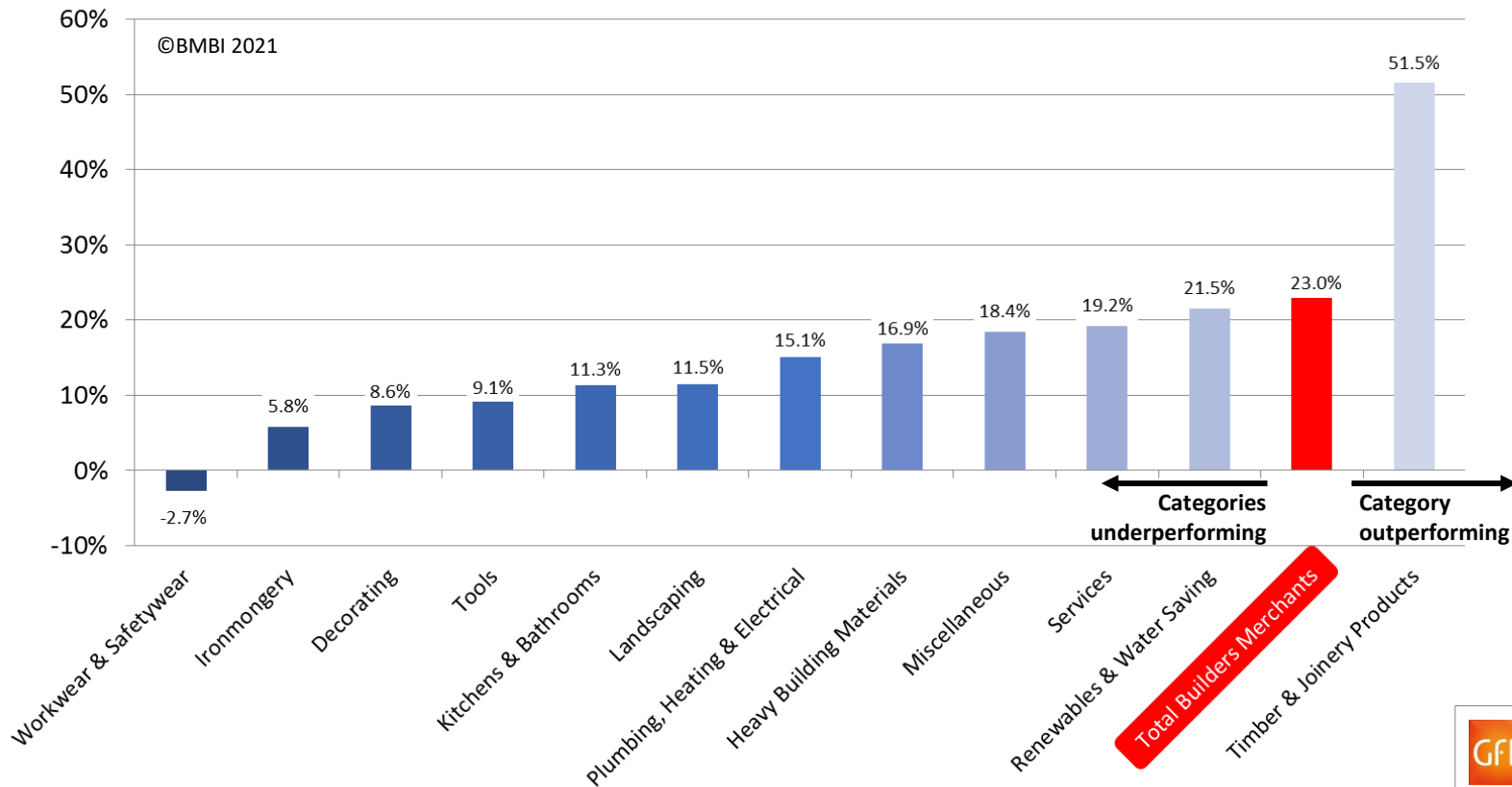
Source: GfK's Builders Merchants Total Category Report July 2015 to August 2021

Monthly: This Year v Last Year

August 2021 sales indices



August 2021 index v August 2020 index



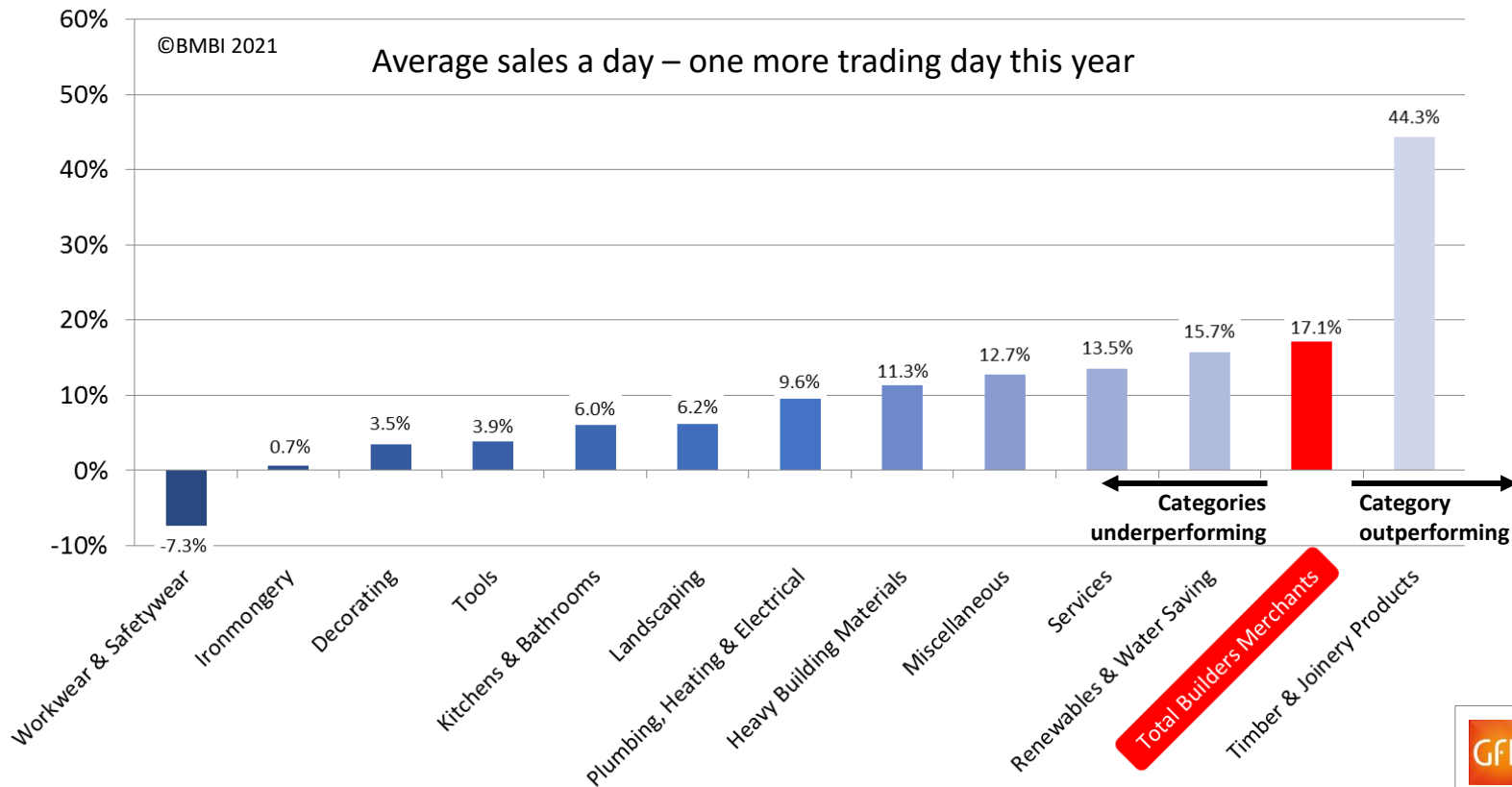
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: This Year v Last Year

August 2021 average sales a day indices



August 2021 index v August 2020 index

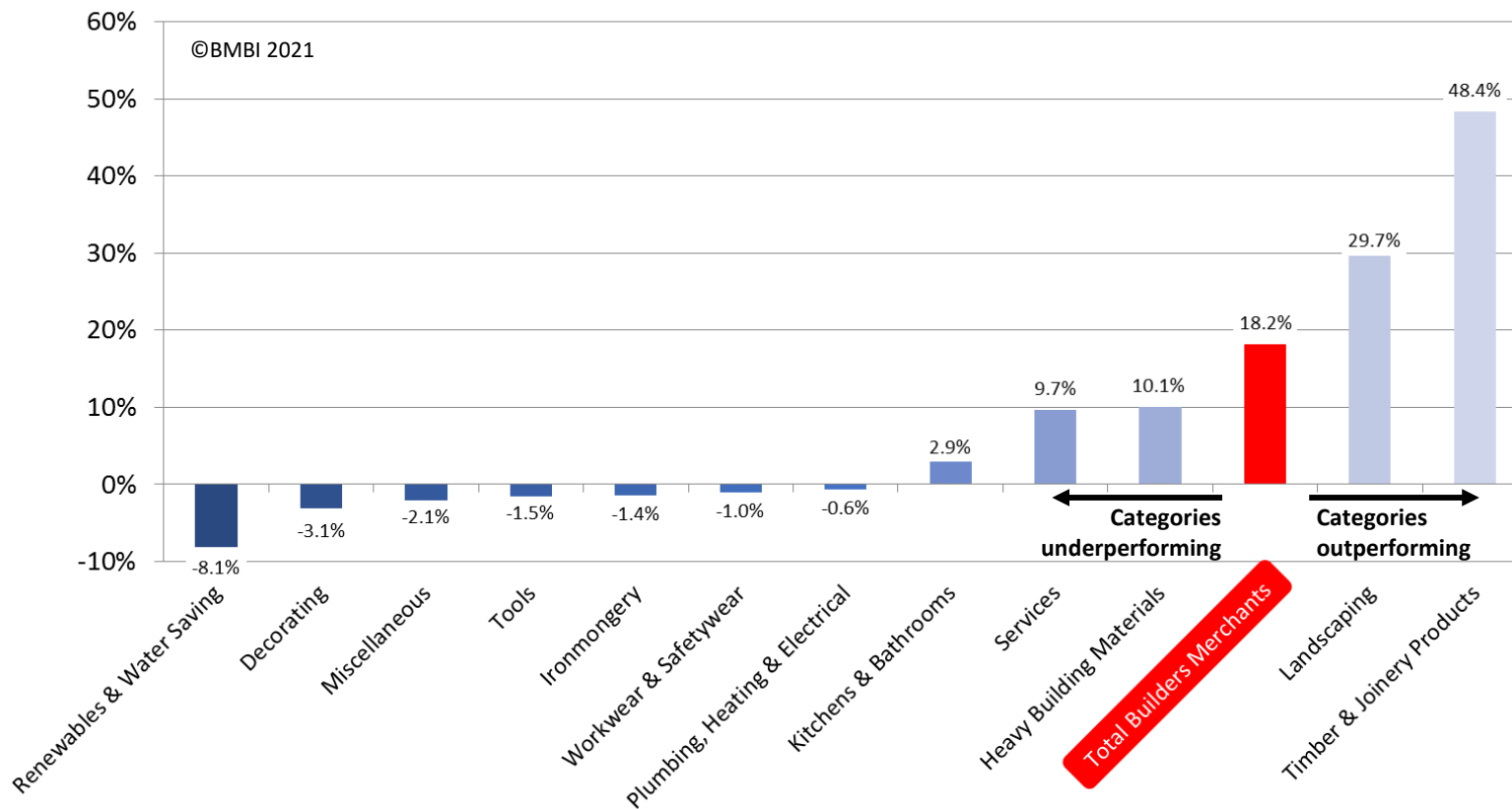


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: This year v 2019

August 2021 2-year sales indices

2-year comparison: August 2021 v August 2019



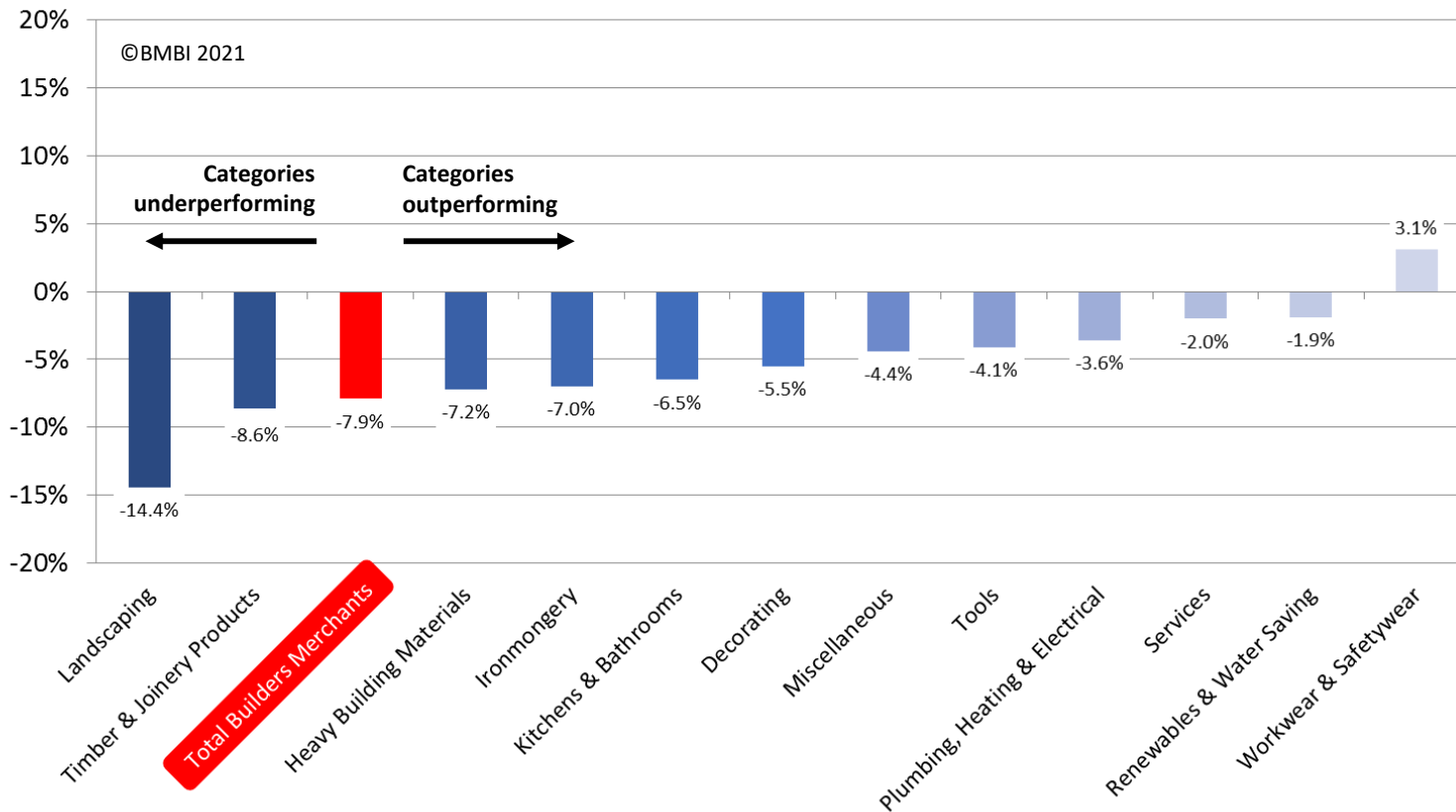
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: This Month v Last Month

August 2021 sales indices



August 2021 Index v July 2021 Index



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

Quarterly: Index and Categories

Quarter 2 2020* to Quarter 2 2021

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
Total Builders Merchants	100	76.4	124.6	111.1	120.7	149.7
Timber & Joinery Products	100	78.0	133.4	125.4	141.5	183.0
Heavy Building Materials	100	75.1	119.9	106.8	113.1	136.3
Decorating	100	56.3	108.5	99.5	101.1	112.2
Tools	100	41.0	94.4	90.7	99.6	103.0
Workwear & Safetywear	100	67.5	113.7	113.3	117.3	103.9
Ironmongery	100	65.0	123.2	112.6	119.3	133.8
Landscaping	100	138.8	175.5	112.1	141.5	237.5
Plumbing, Heating & Electrical	100	53.9	104.6	116.0	122.9	118.6
Renewables & Water Saving	100	31.5	66.4	62.6	70.3	77.2
Kitchens & Bathrooms	100	48.4	111.6	109.8	107.5	116.7
Miscellaneous	100	63.3	111.0	108.6	115.9	119.2
Services	100	72.8	115.9	107.3	110.4	127.9

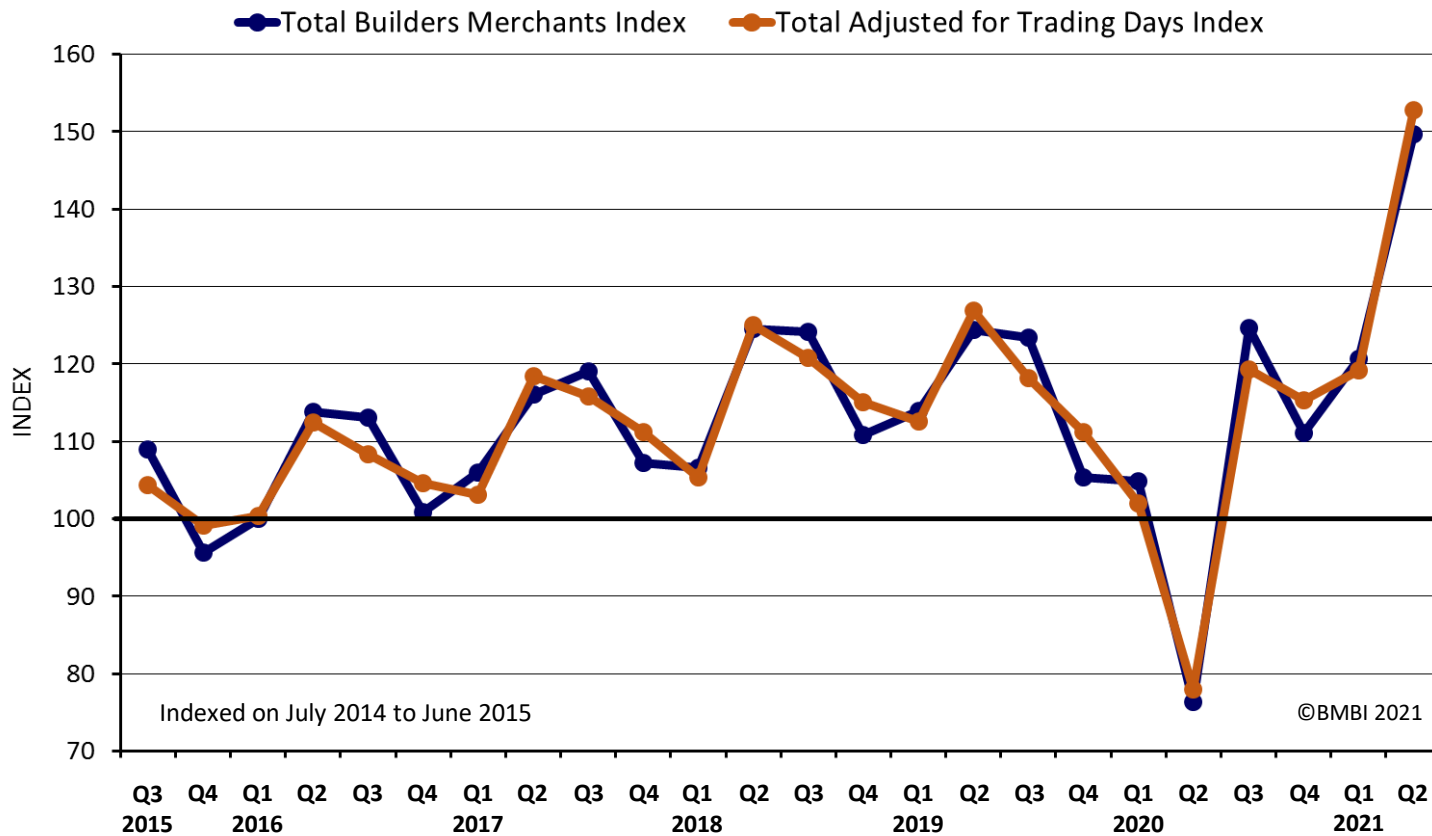
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.


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

Quarterly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



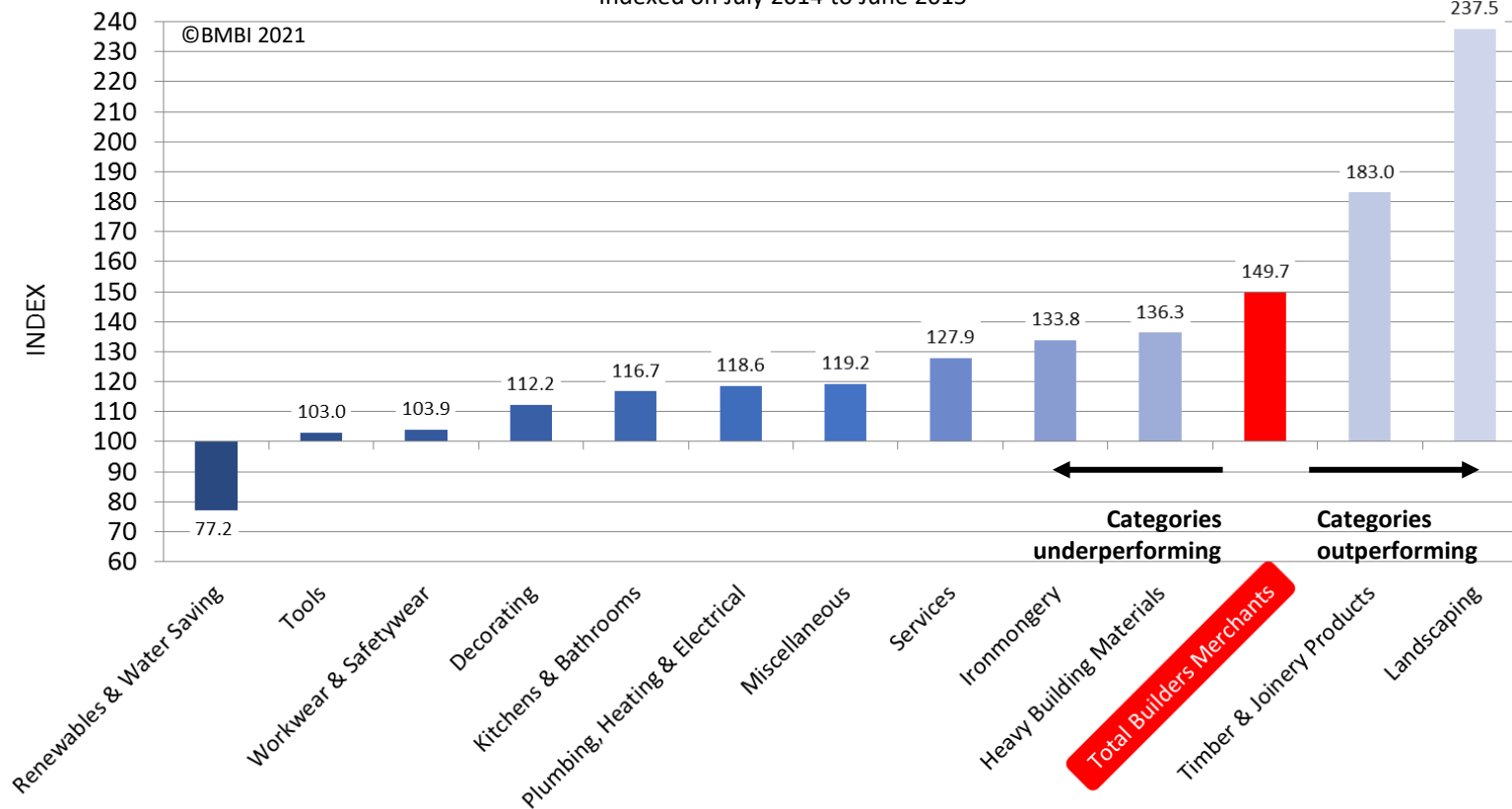
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021


Quarterly: Index and Categories

Q2 2021 index

Quarter 2 2021

Indexed on July 2014 to June 2015



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

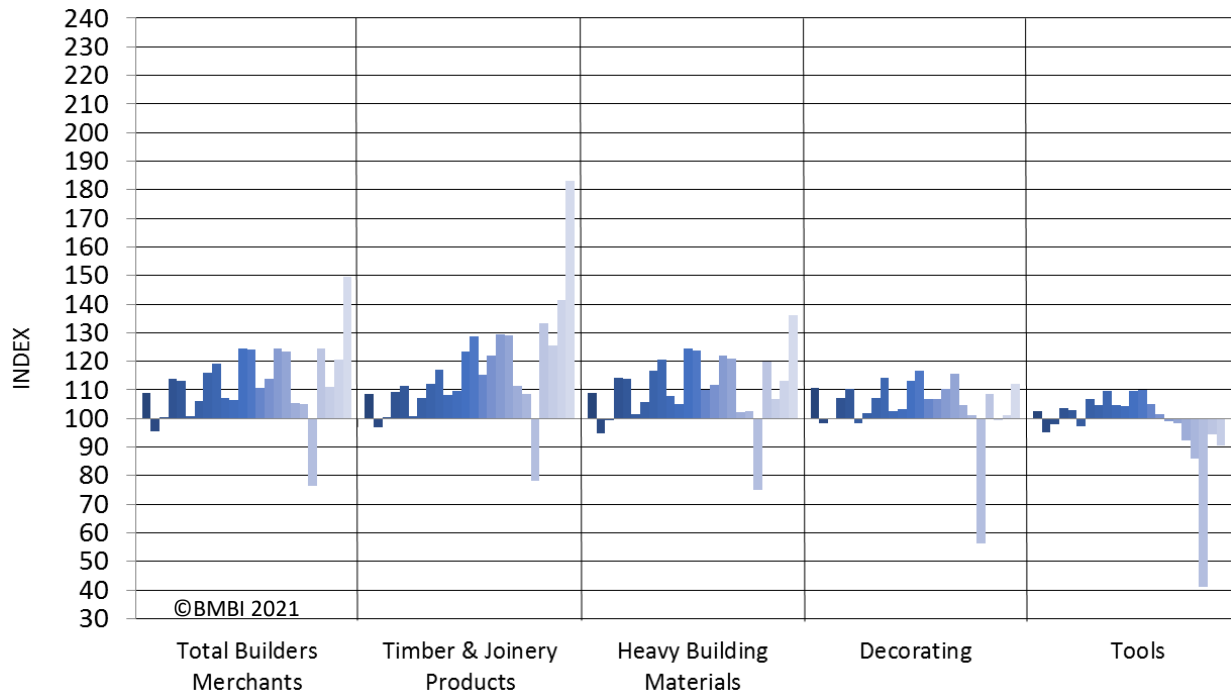
Quarterly: Index and Categories - 1

Quarterly indices



Quarterly Indices Q3 2015 to Q2 2021

- 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
- Q1 2021
- Q2 2021



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

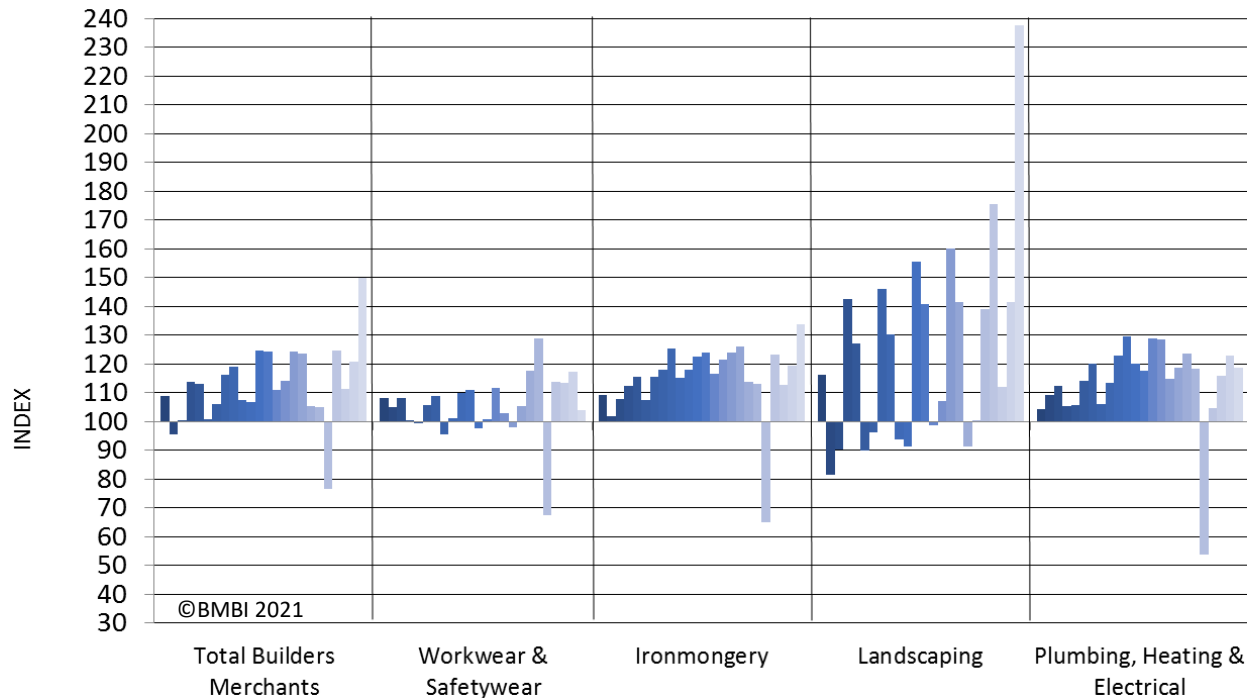
Quarterly: Index and Categories - 2

Quarterly indices



- 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
- Q1 2021
- Q2 2021

Quarterly Indices Q3 2015 to Q2 2021



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

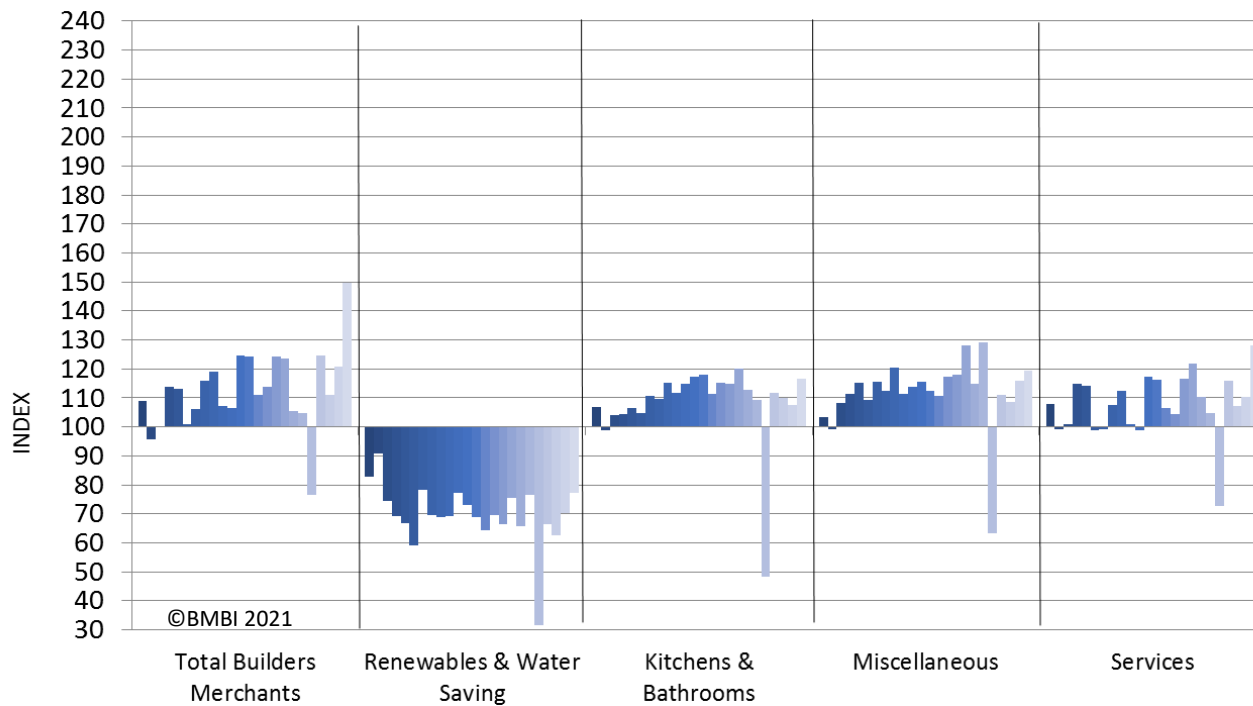
Quarterly: Index and Categories - 3

Quarterly indices



Quarterly Indices Q3 2015 to Q2 2021

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
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- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020
- Q1 2021
- Q2 2021

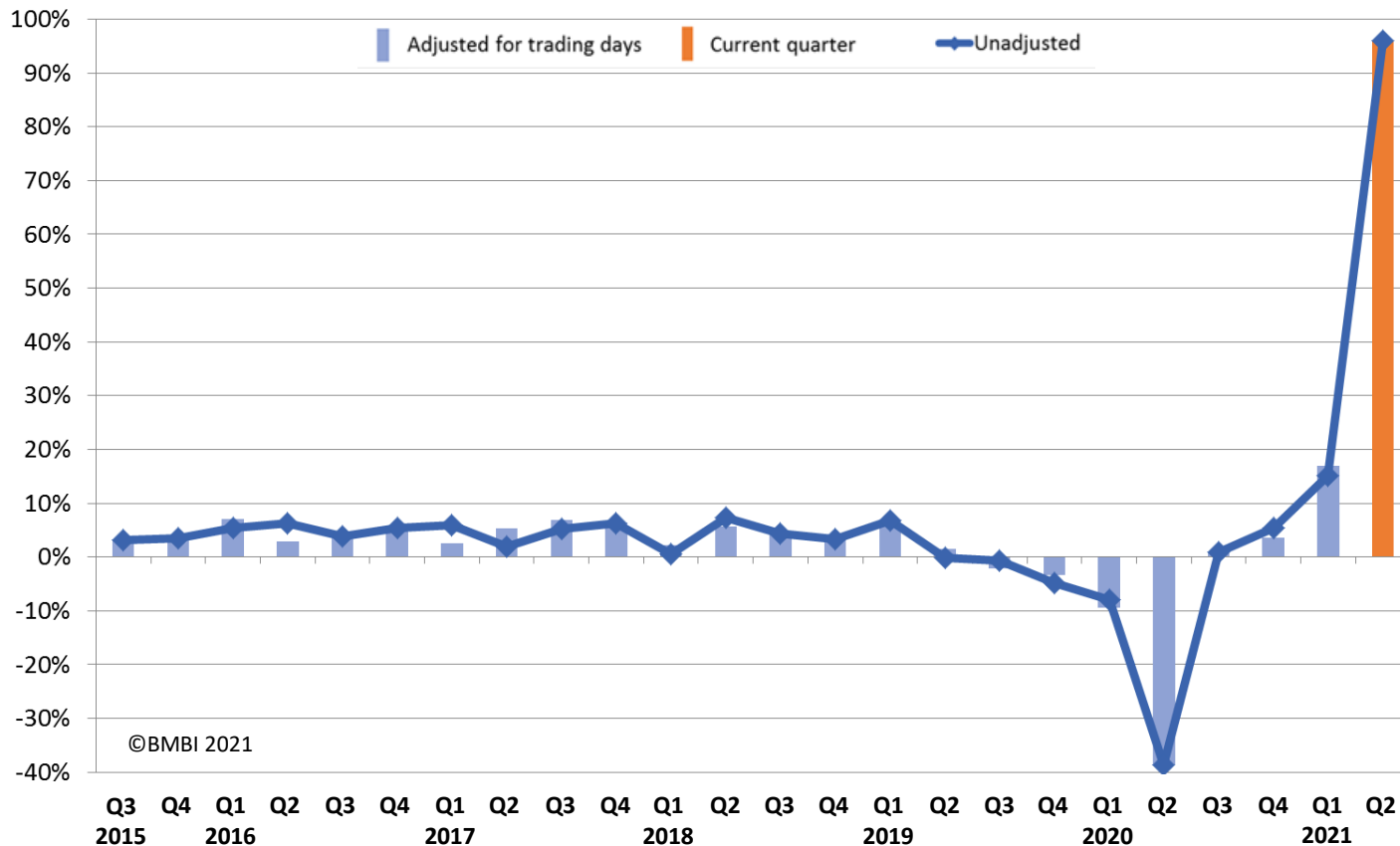


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year



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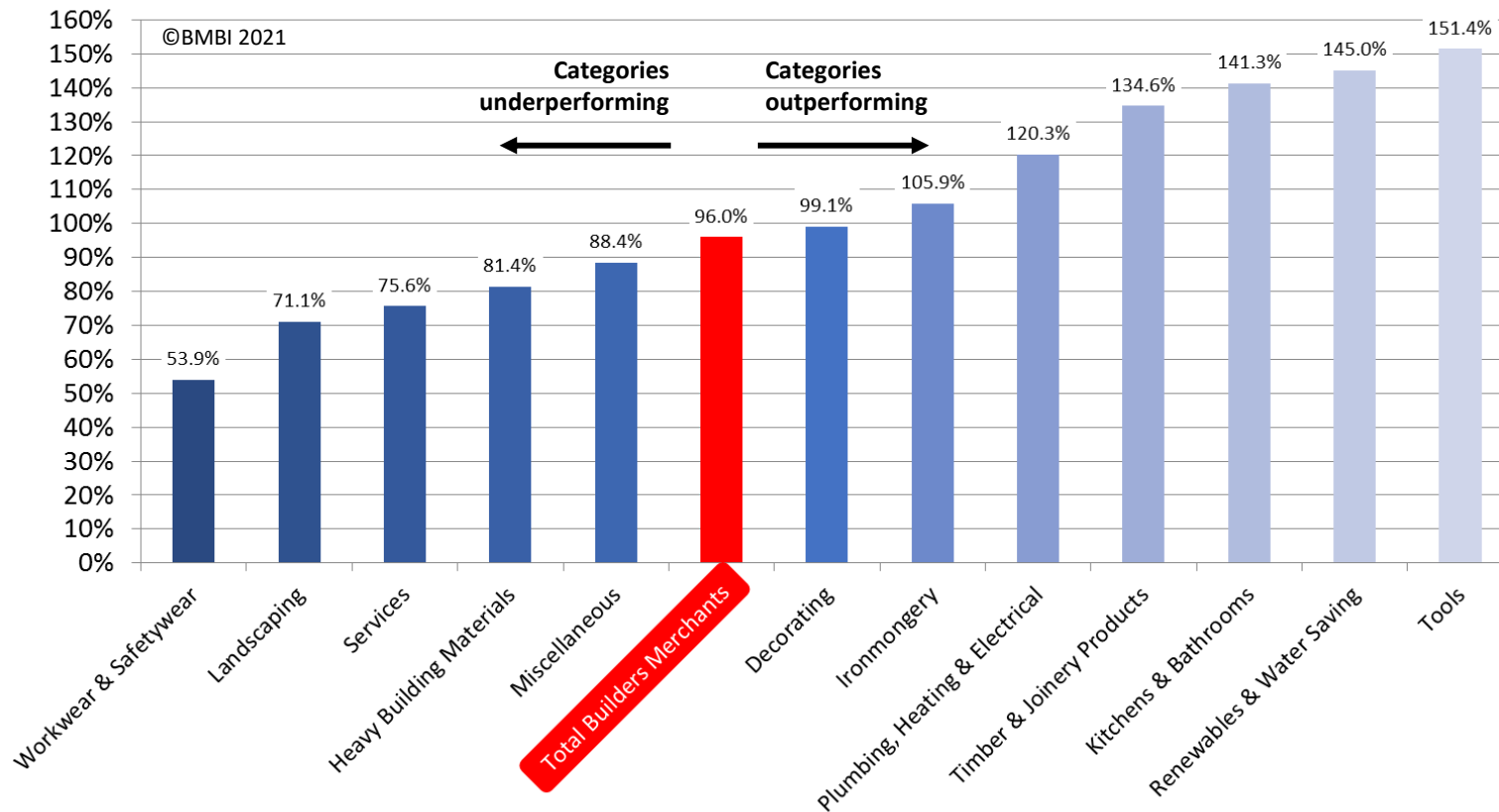
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021

Quarterly: This Year v Last Year

Q2 2021 sales indices



Quarter 2 2021 index v Quarter 2 2020 index



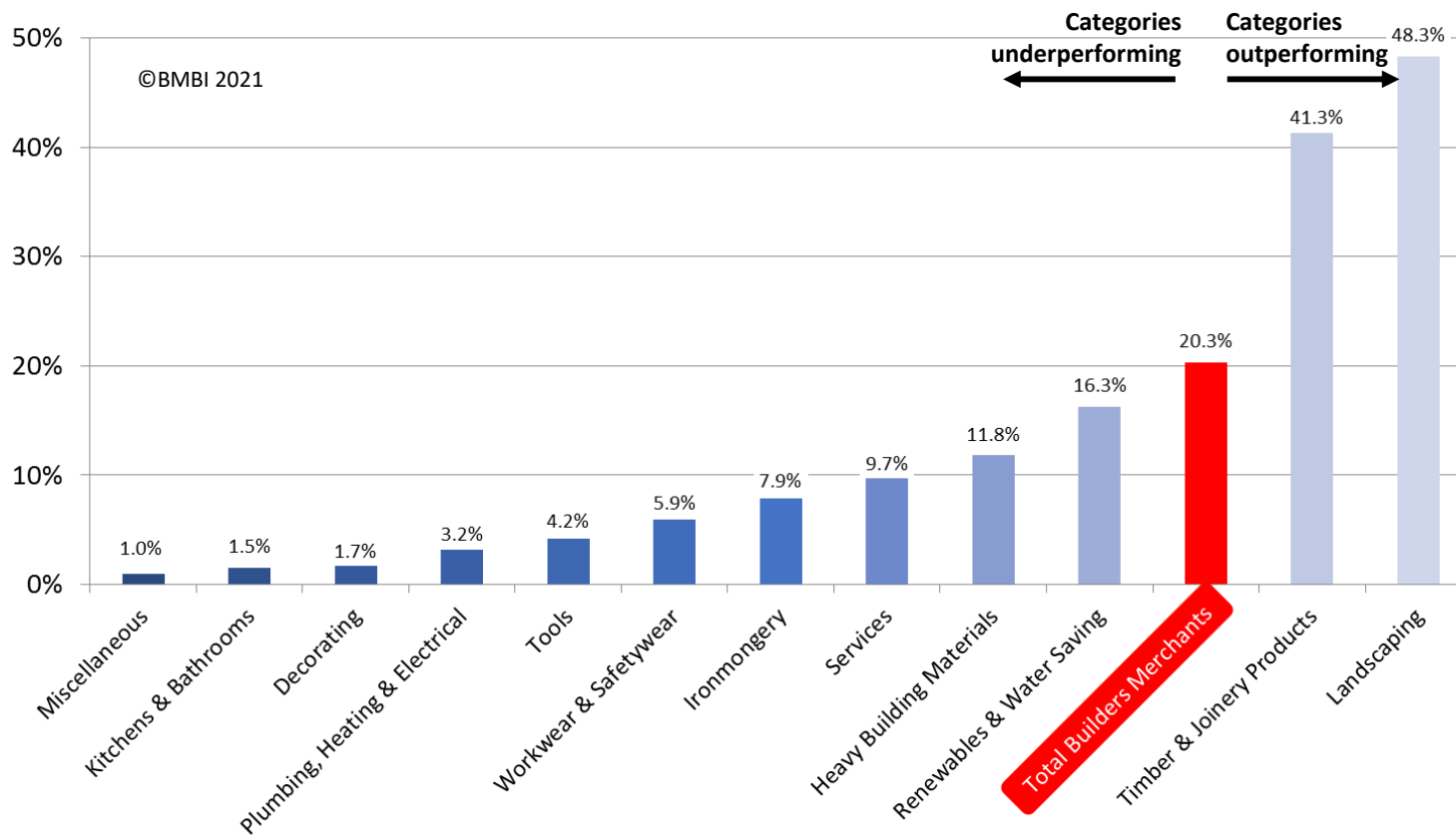
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021


Quarterly: This Year v 2019

Q2 2021 2-year sales indices



2-year comparison: Quarter 2 2021 v Quarter 2 2019



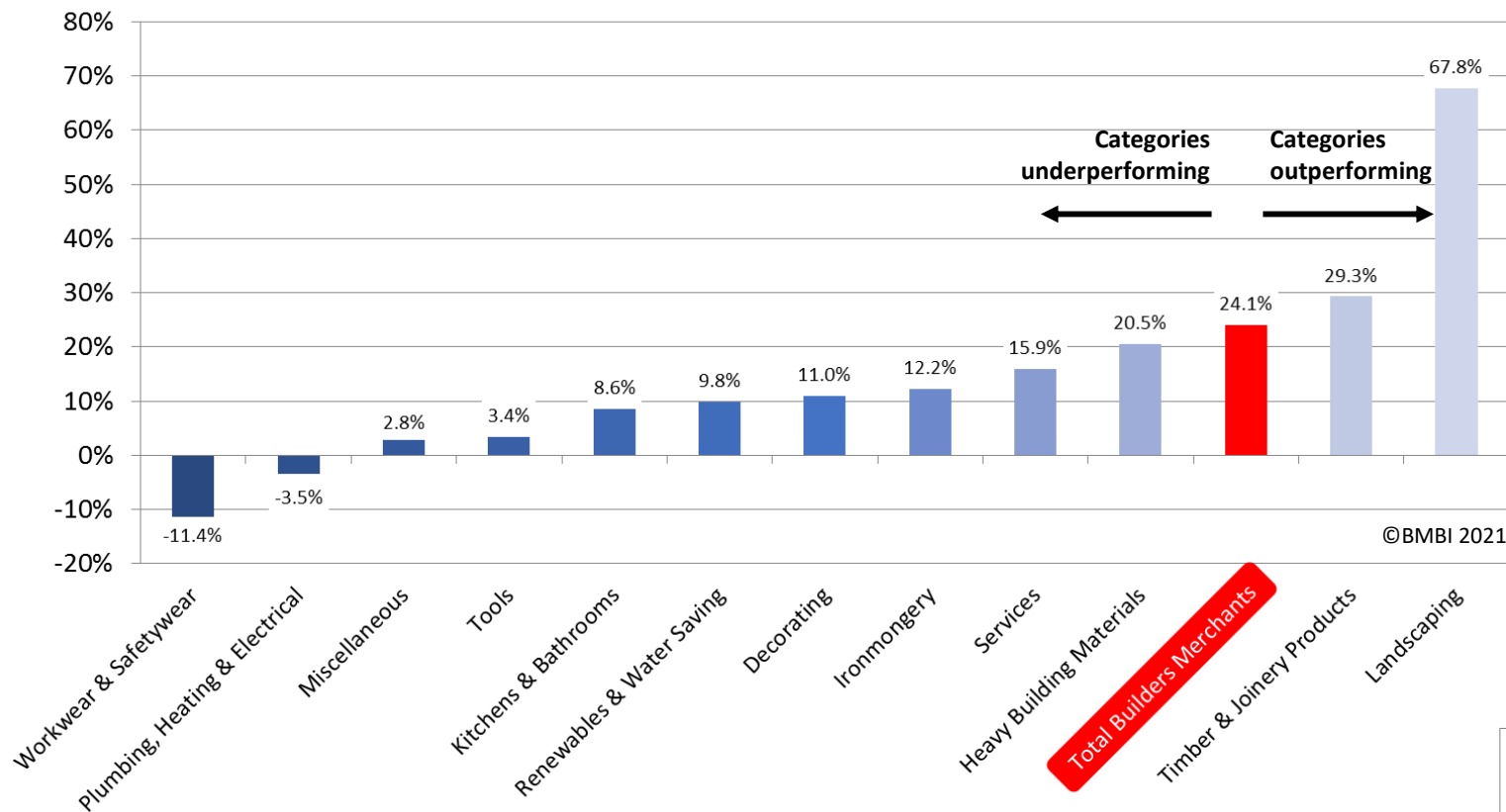
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021

Quarterly: Quarter on Quarter

Q2 2021 sales indices



Quarter 2 2021 index v Quarter 1 2021 index



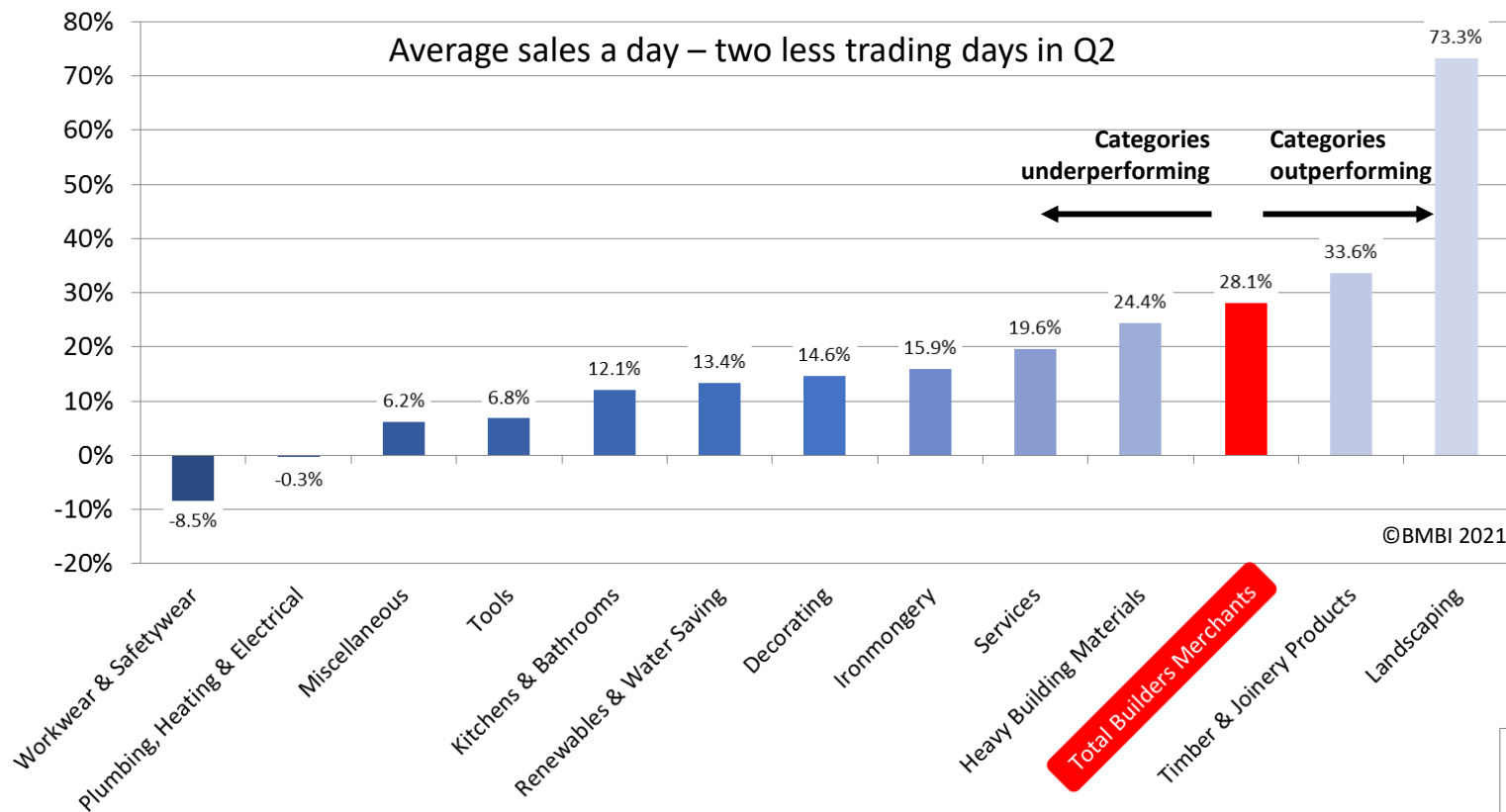
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021

Quarterly: Quarter on Quarter

Q2 2021 average sales a day indices



Quarter 2 2021 index v Quarter 1 2021 index



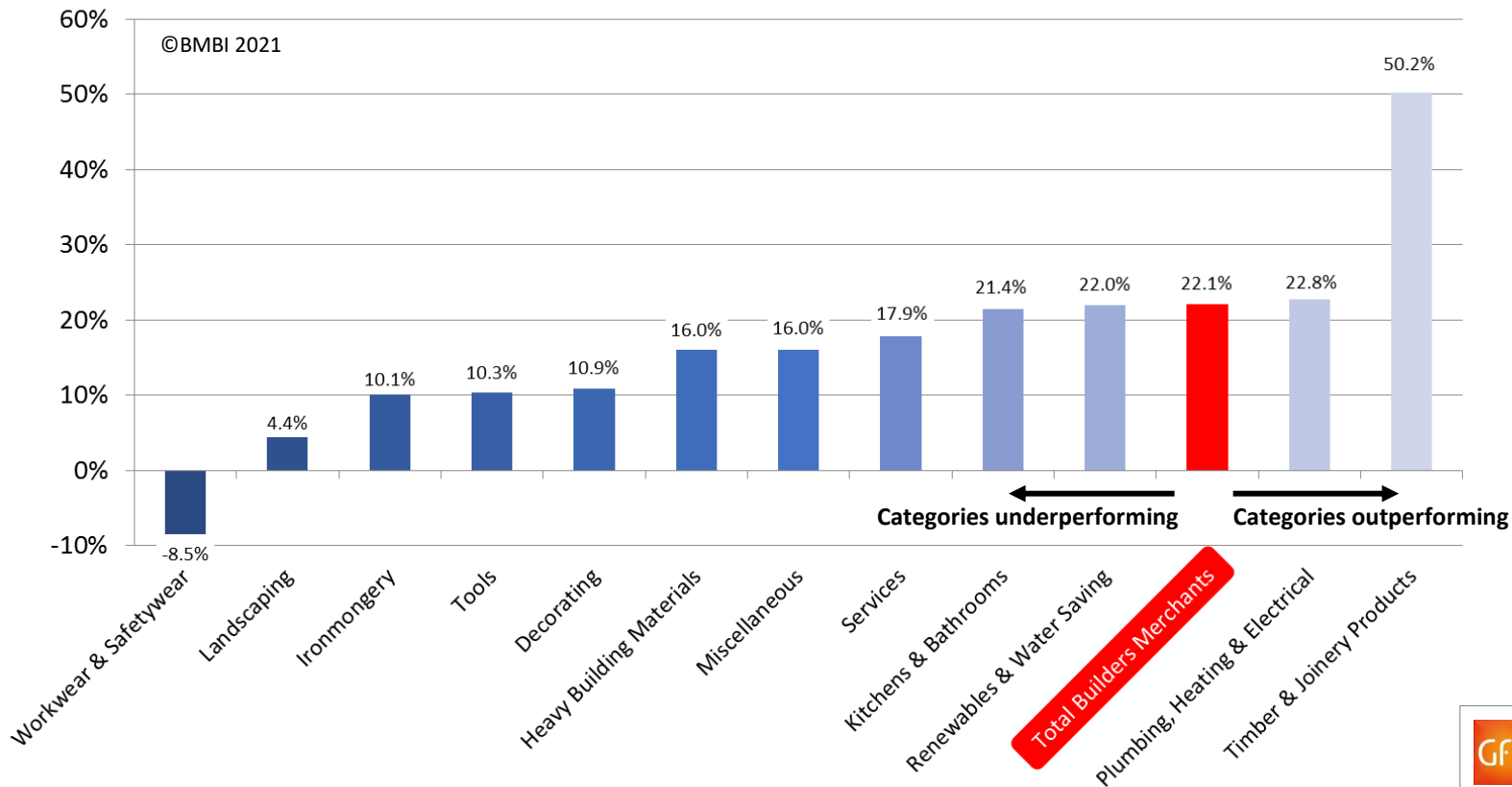
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to June 2021

Latest 3 months: v last year

June to August sales indices



3 months Jun 21 to Aug 21 v 3 months Jun 20 to Aug 20



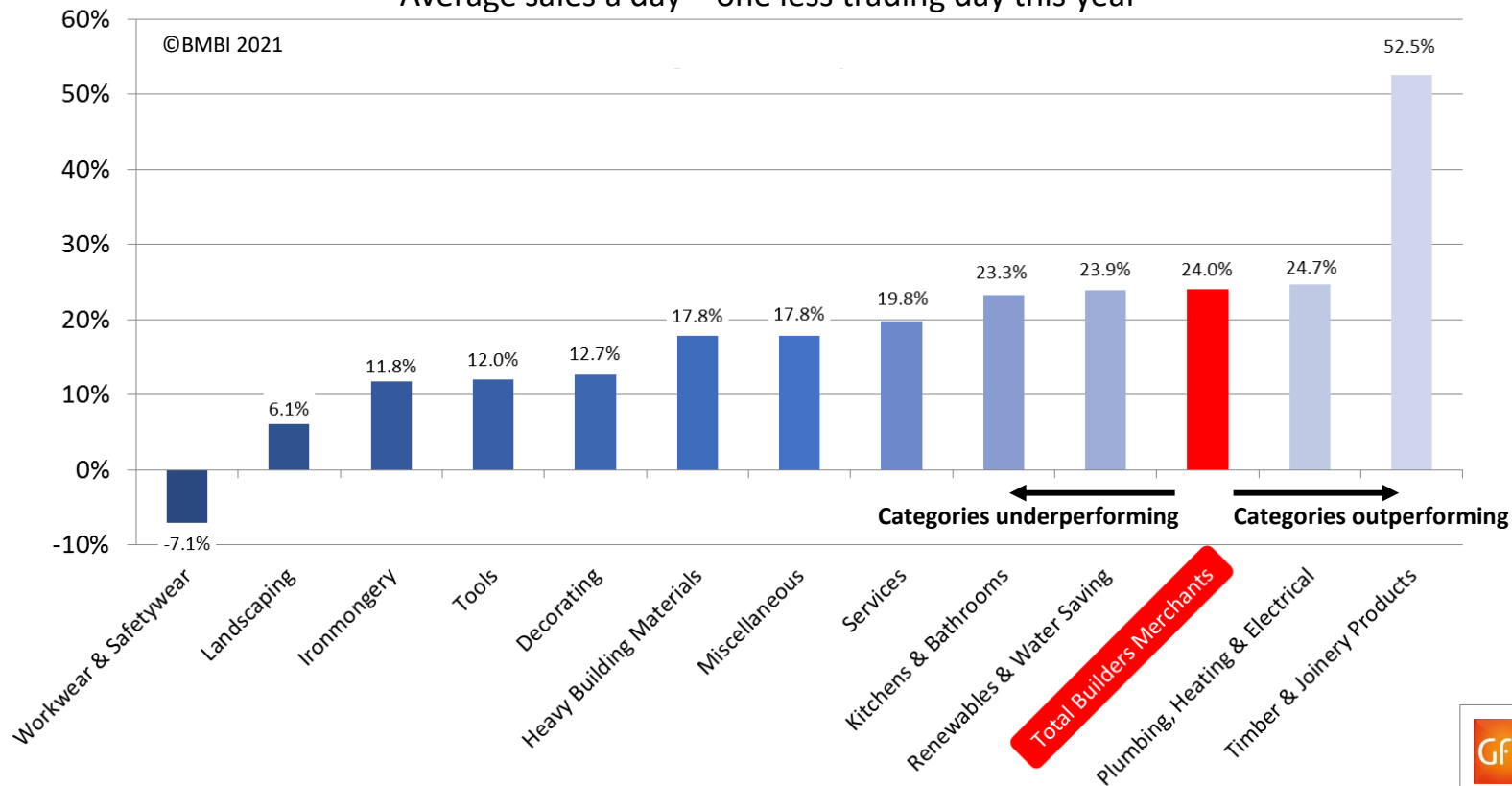
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Latest 3 months: v last year

June to August average sales a day indices

3 months Jun 21 to Aug 21 v 3 months Jun 20 to Aug 20

Average sales a day – one less trading day this year

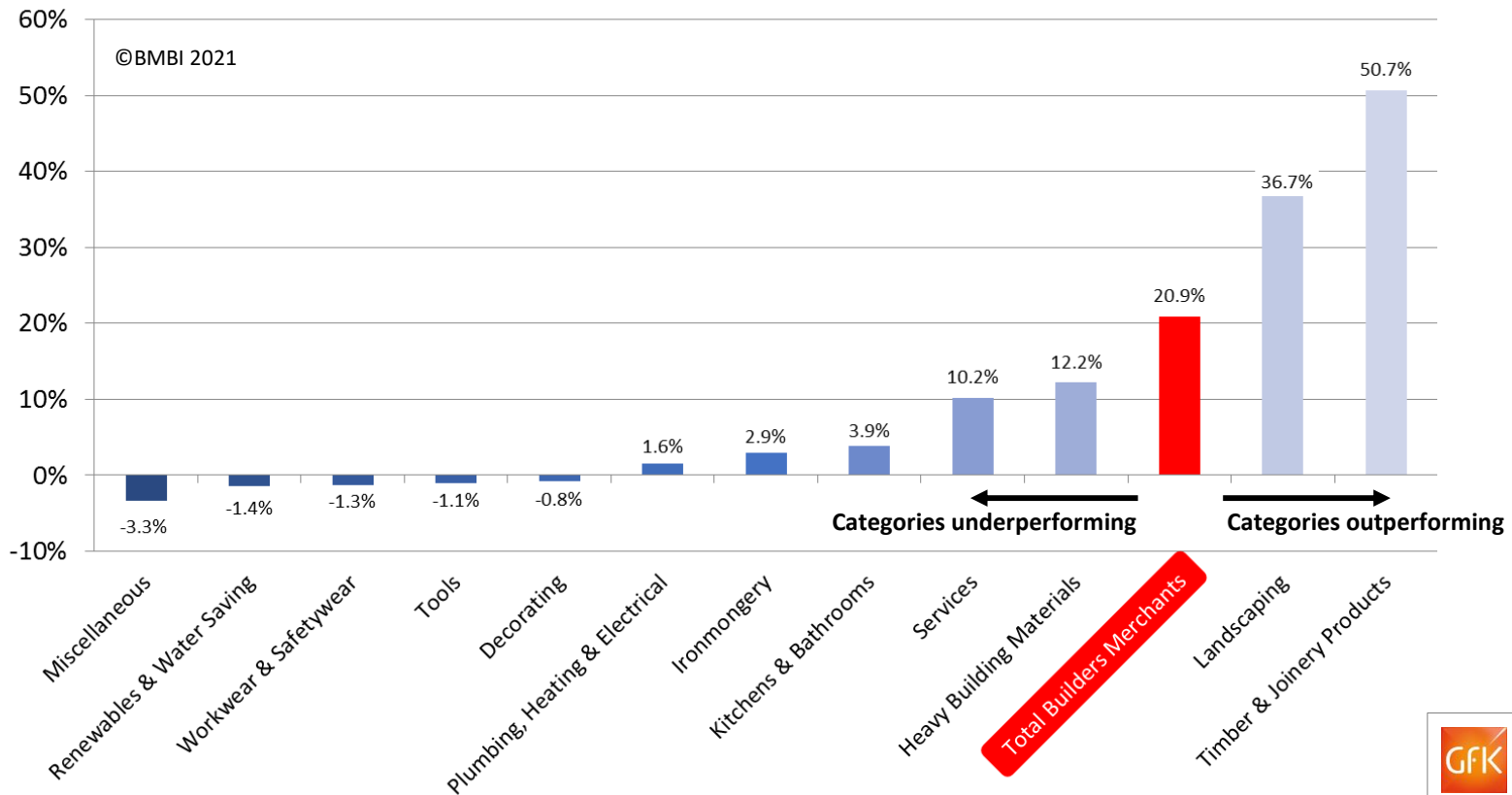


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Latest 3 months: v 2019

June to August 2-year sales indices

2-year comparison: Jun 21 to Aug 21 v Jun 19 to Aug 19



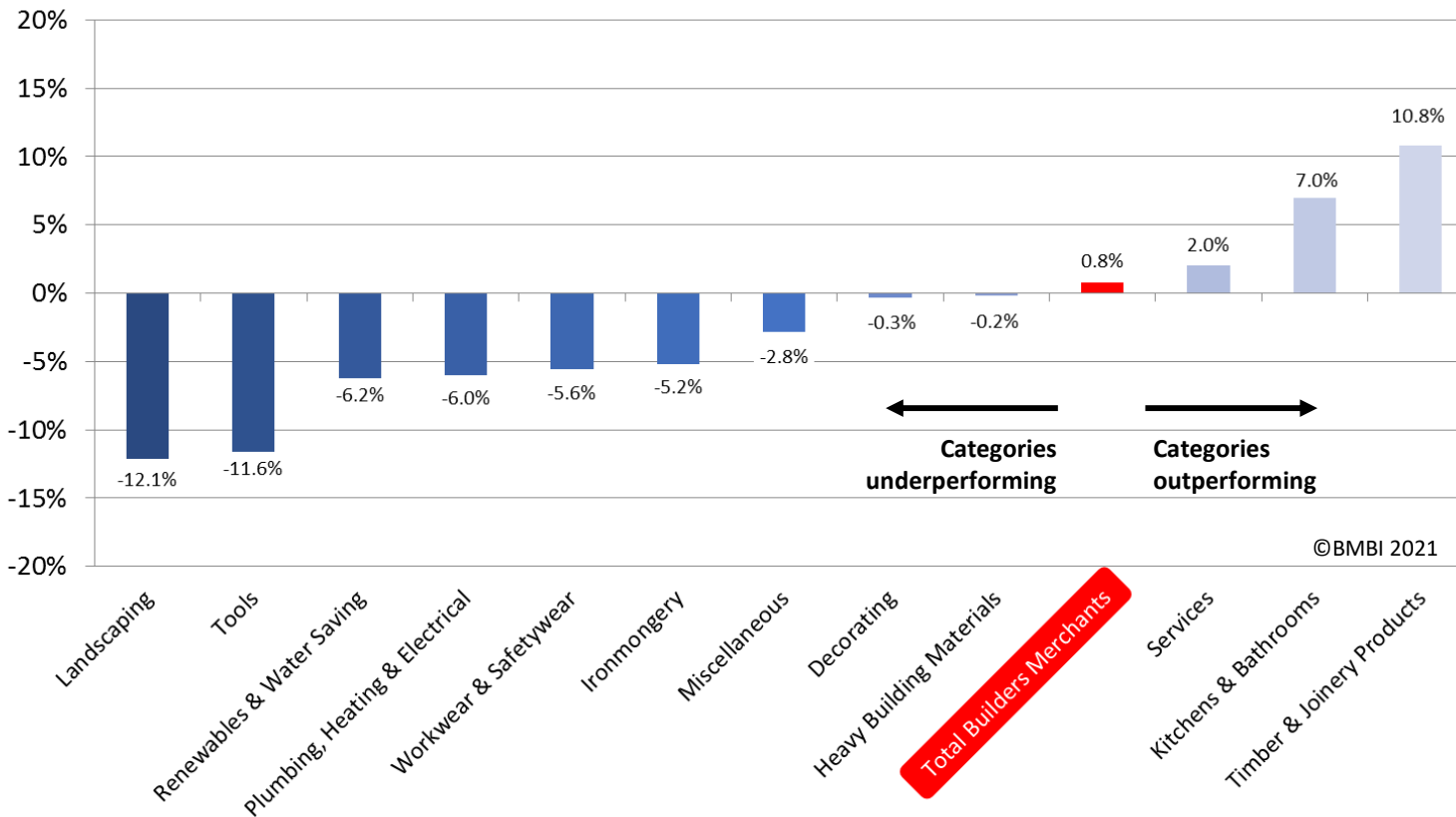
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Latest 3 months: v previous 3 months

June to August sales indices



3 months Jun 21 to Aug 21 v 3 months Mar 21 to May 21



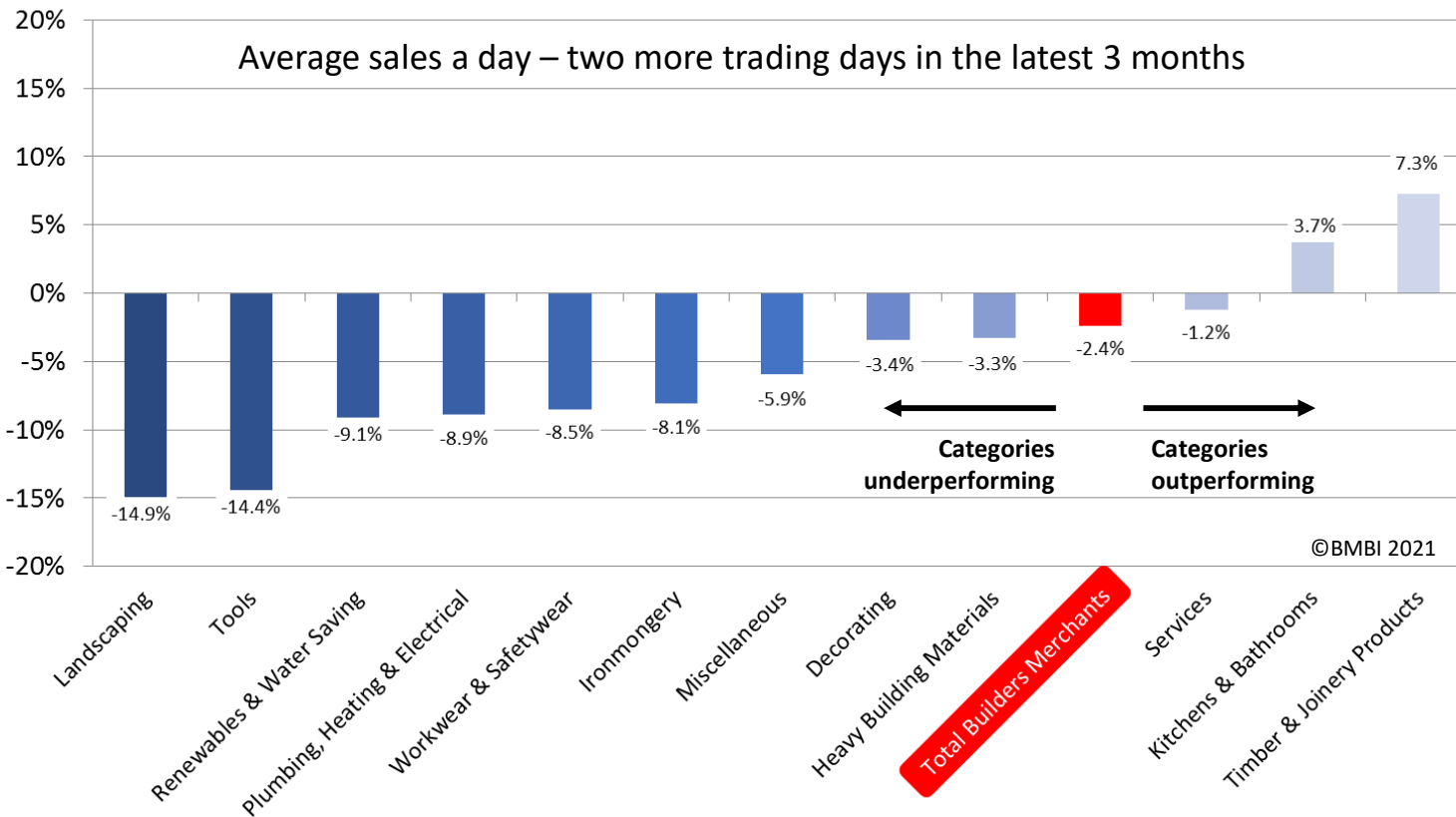
Source: GfK's Builders Merchants Total Category Report July 2015 to August 2021

Latest 3 months: v previous 3 months

June to August average sales a day indices



3 months Jun 21 to Aug 21 v 3 months Mar 21 to May 21

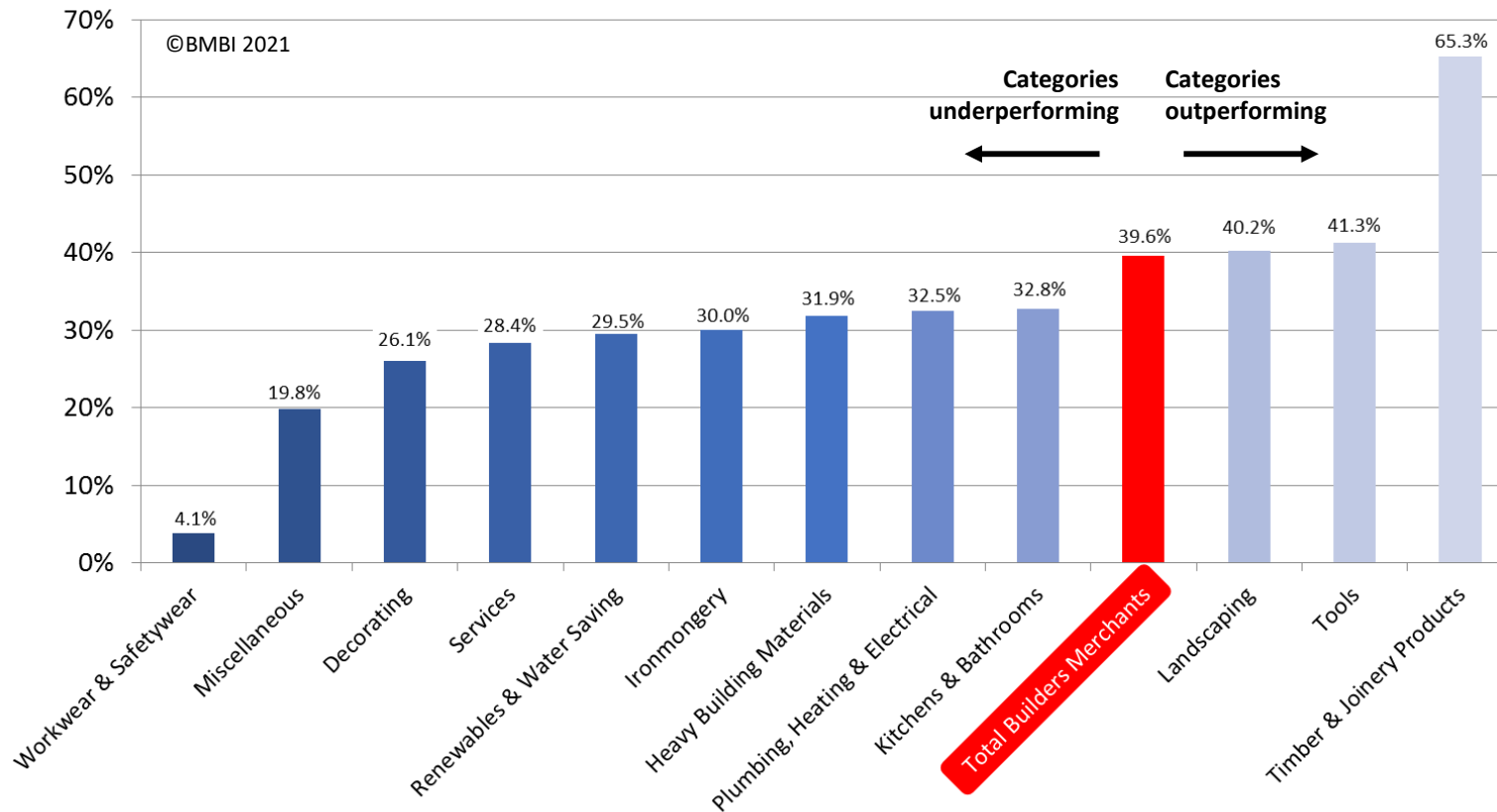


Source: GfK's Builders Merchants Total Category Report July 2015 to August 2021

Year to date: Year on Year

Last 8 months sales indices

Year to date: Jan 21 to Aug 21 index v Jan 20 to Aug 20 index



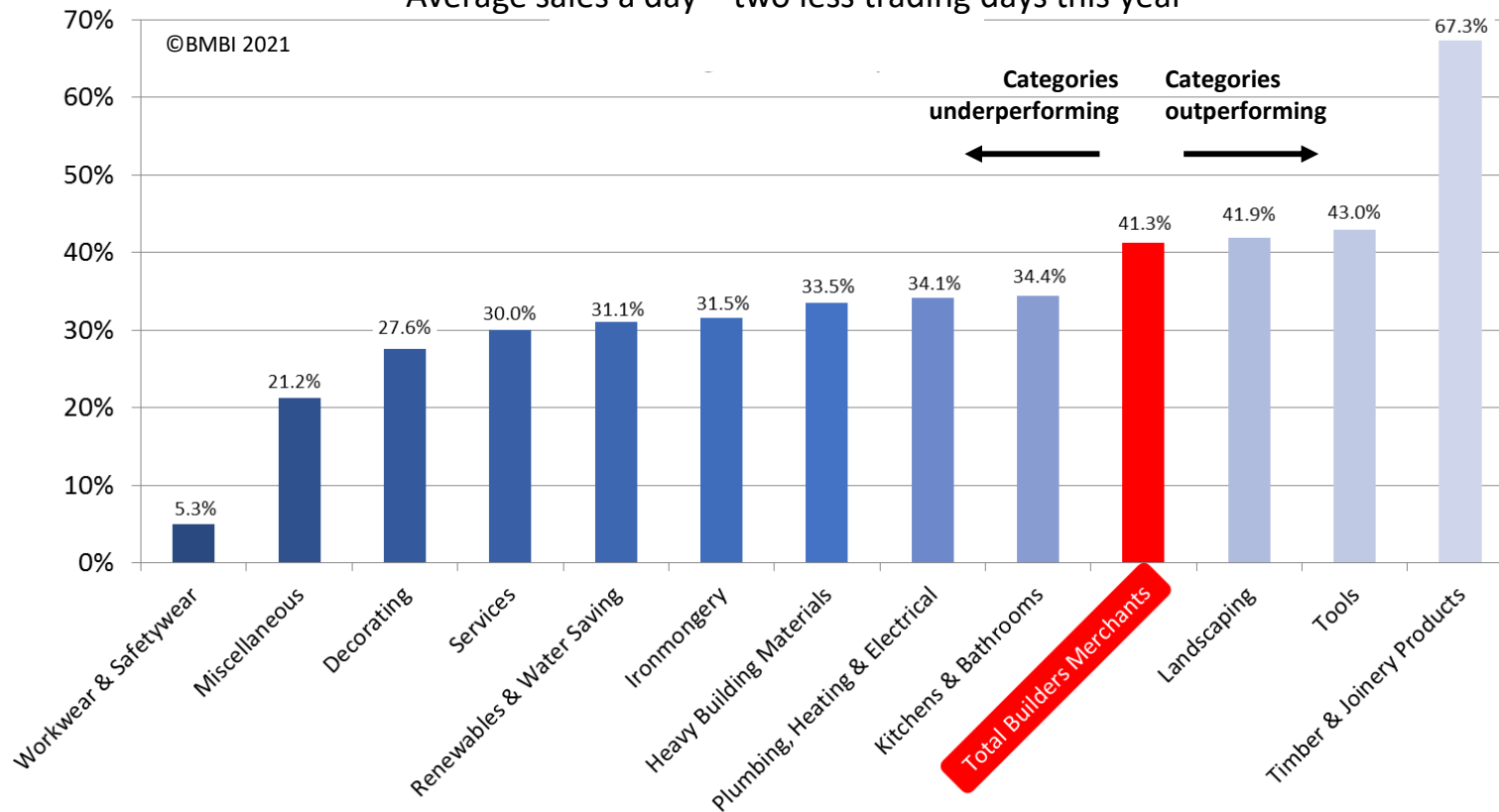
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Year to date: Year on Year

Last 8 months average sales a day indices

Year to date: Jan 21 to Aug 21 index v Jan 20 to Aug 20 index

Average sales a day – two less trading days this year

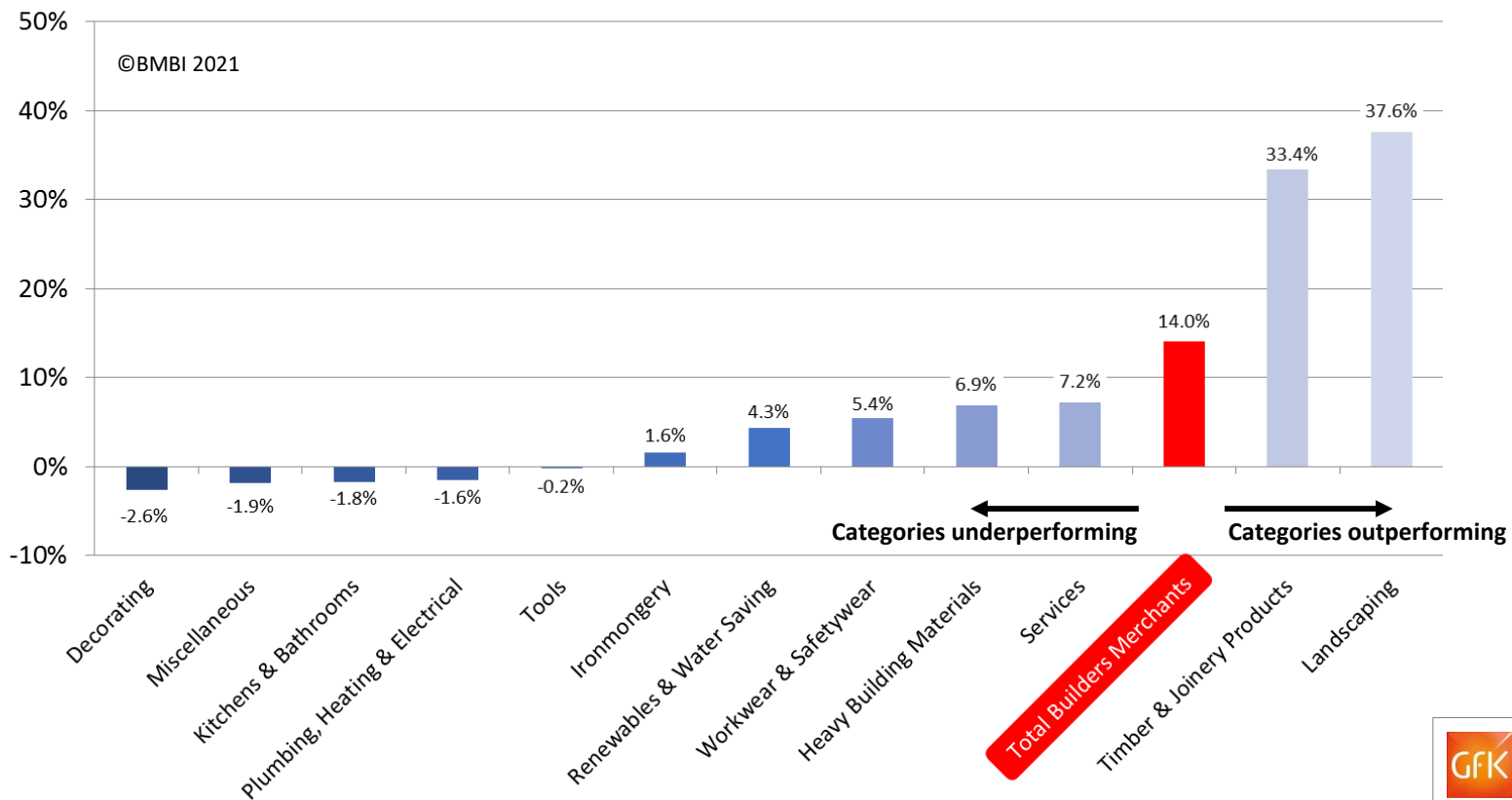


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Year to date: v 2019

Last 8 months 2-year sales indices

2-year comparison: Jan 21 to Aug 21 v Jan 19 to Aug 19



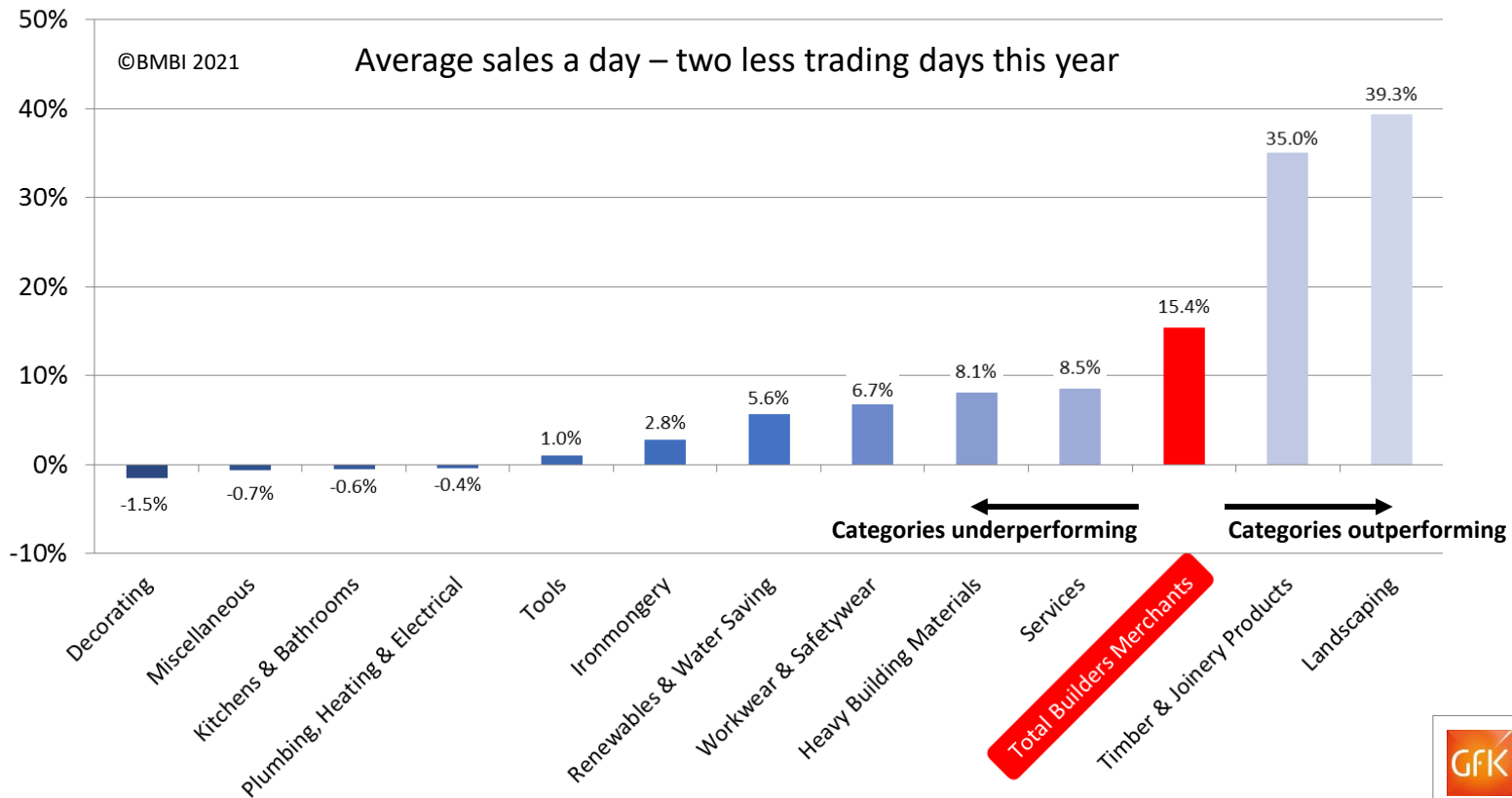
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Year to date: v 2019

Last 8 months 2-year average sales a day indices



2-year comparison: Jan 21 to Aug 21 v Jan 19 to Aug 19

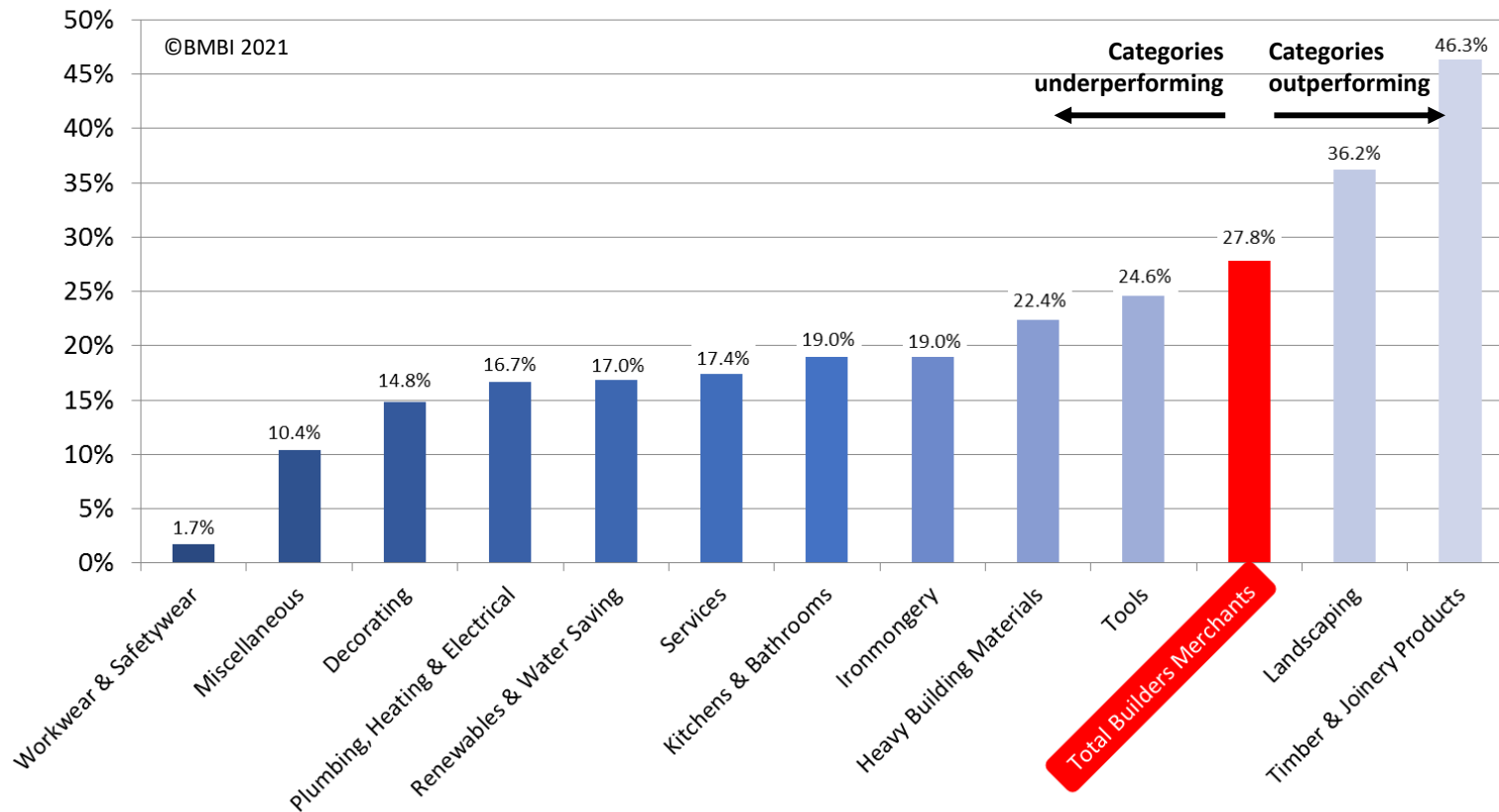



Source: GfK's Builders Merchants Total Category Report July 2015 to August 2021

Last 12 months: Year on Year

MAT

12 months Sep 20 to Aug 21 v 12 months Sep 19 to Aug 20



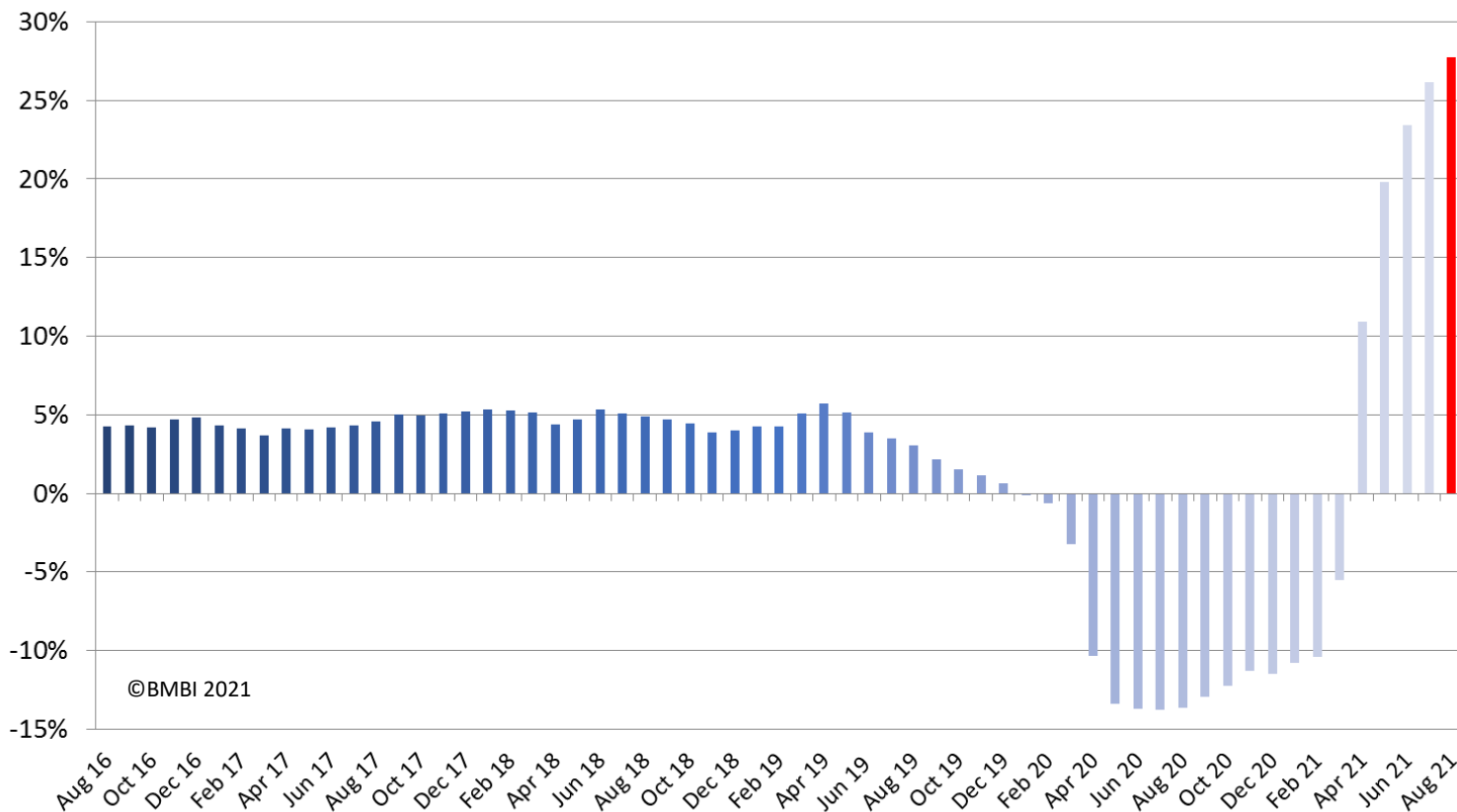
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

12 months: Year on Year

MAT



MAT: Total Builders Merchants July 2016 to August 2021



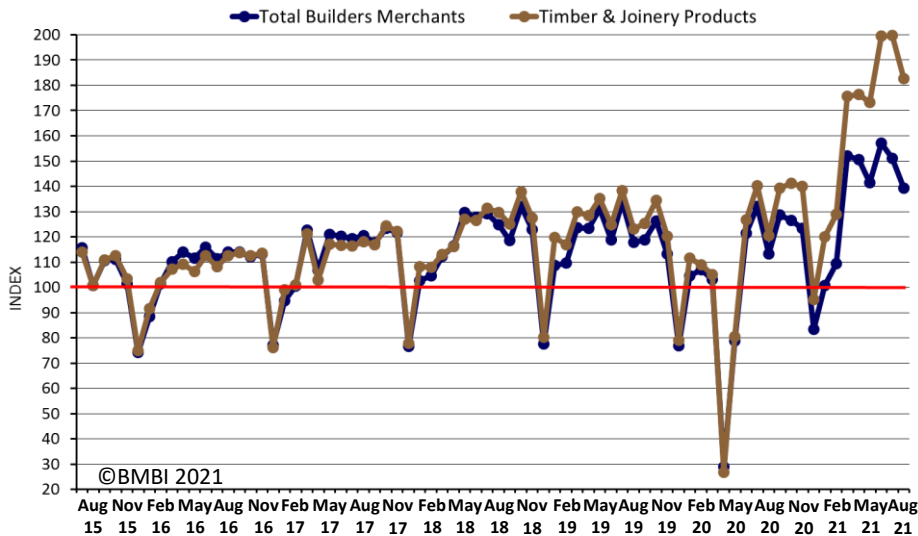
©BMBI 2021

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

Monthly: Indices

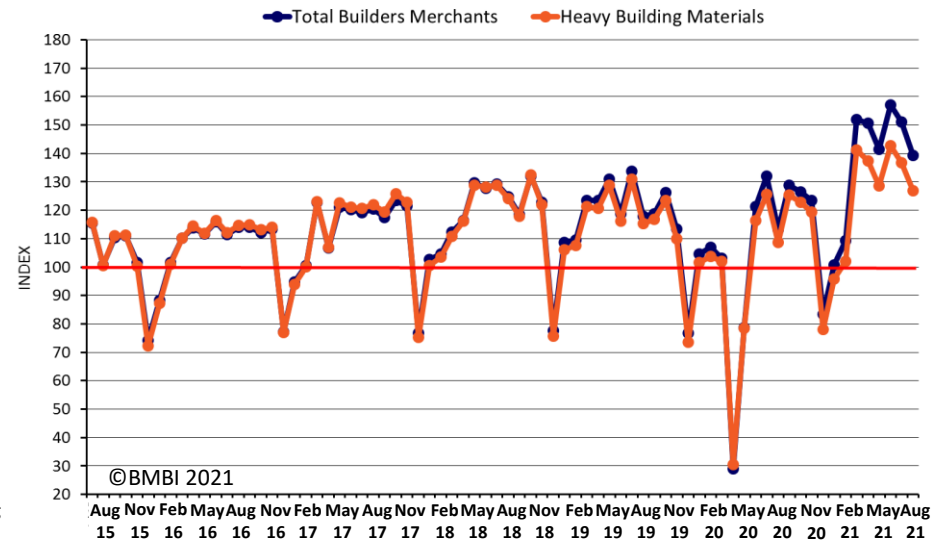
August 2021

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



Indexed on July 2014 – June 2015

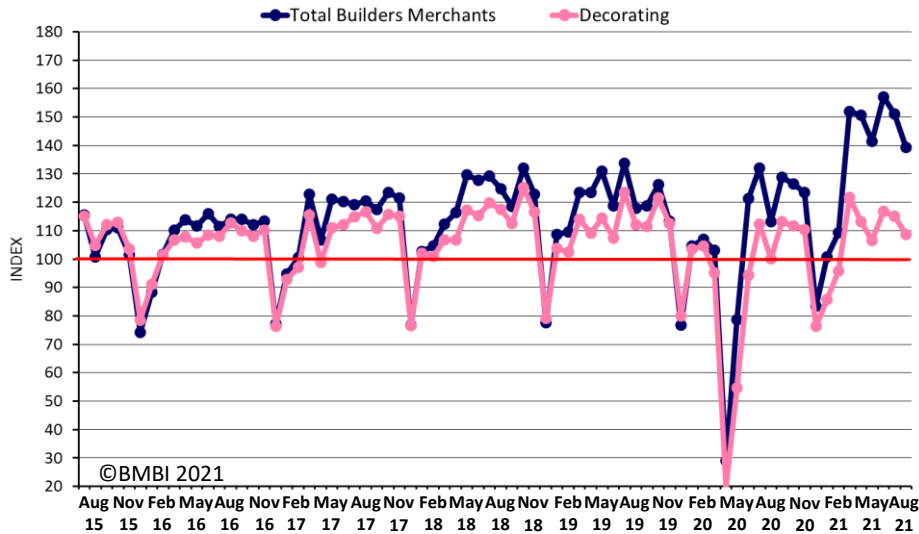
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: Indices

August 2021

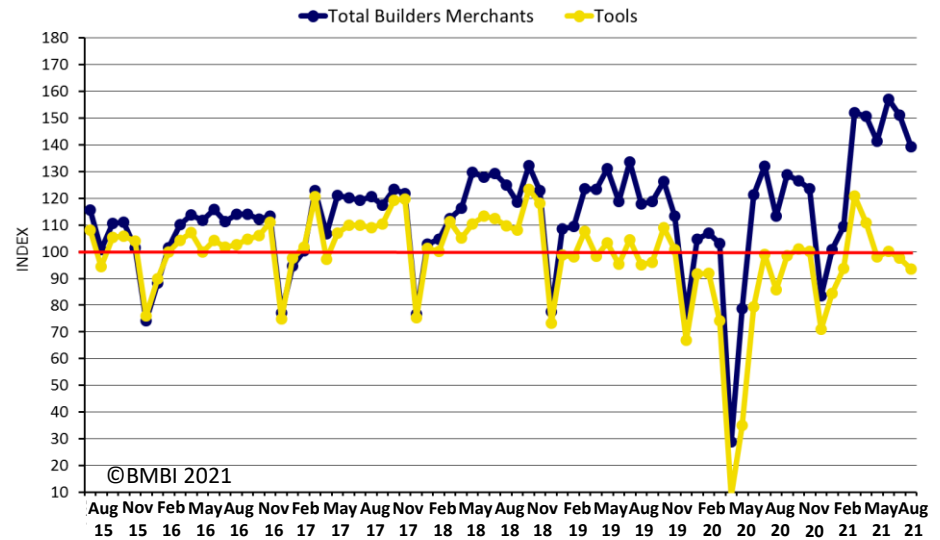


Decorating



Indexed on July 2014 – June 2015

Tools



Indexed on July 2014 – June 2015

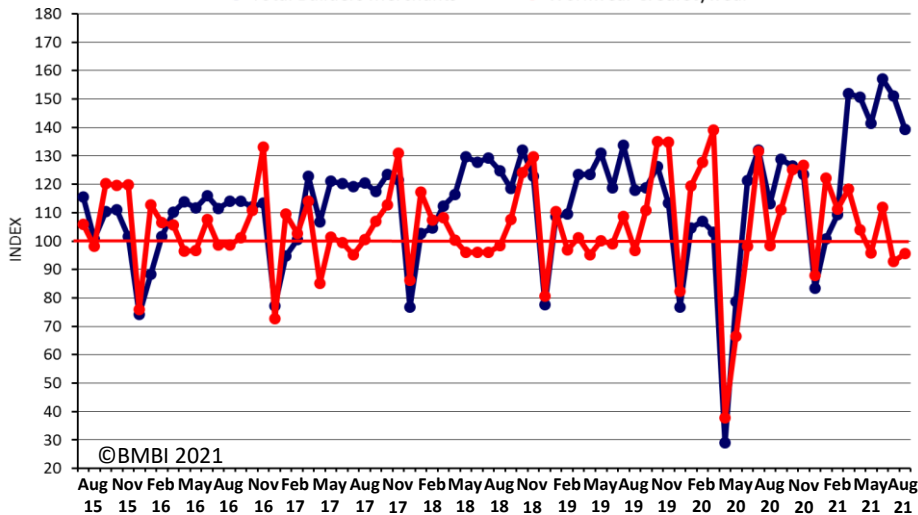
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: Indices

August 2021

Workwear & Safetywear

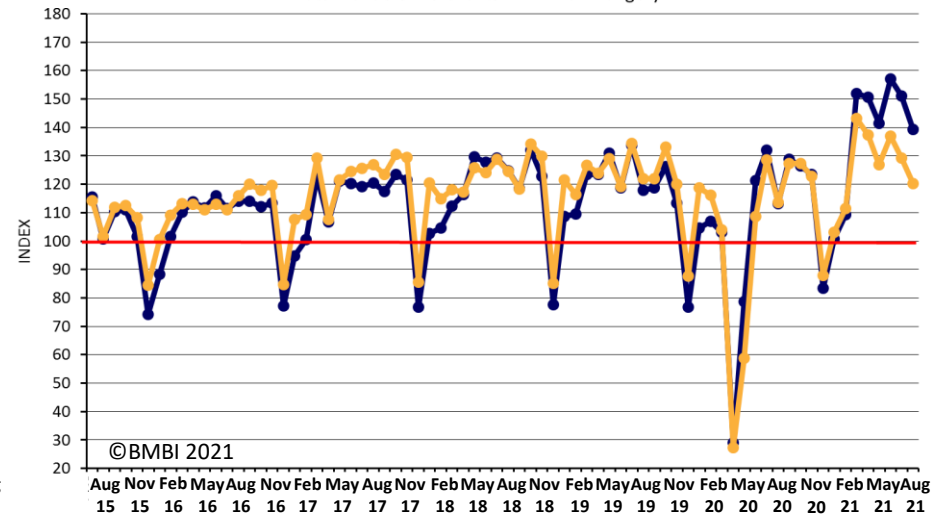
— Total Builders Merchants — Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery

— Total Builders Merchants — Ironmongery



Indexed on July 2014 – June 2015

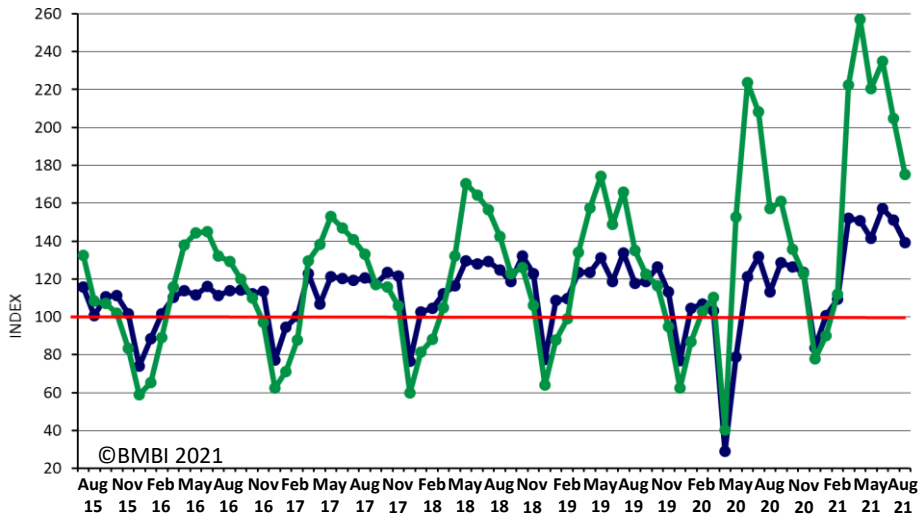
Monthly: Indices

August 2021



Landscaping

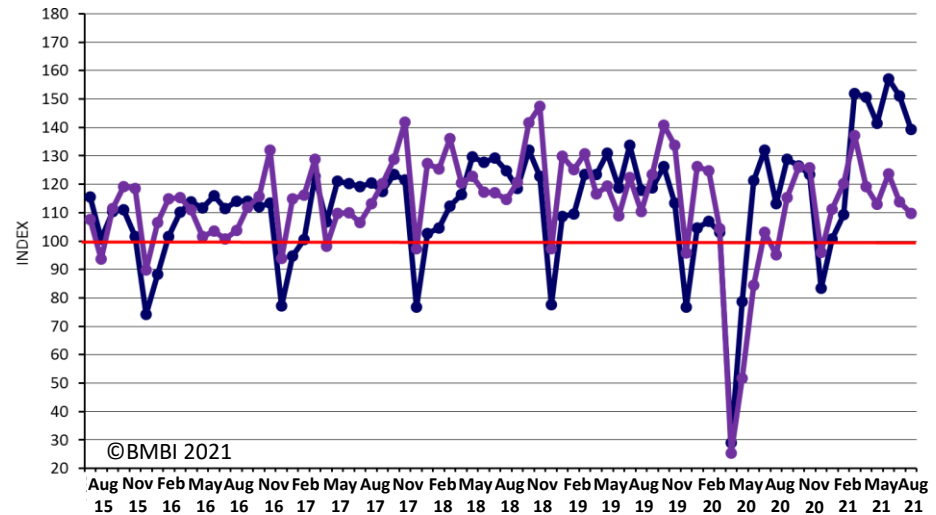
◆ Total Builders Merchants ◆ Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical

◆ Total Builders Merchants ◆ Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

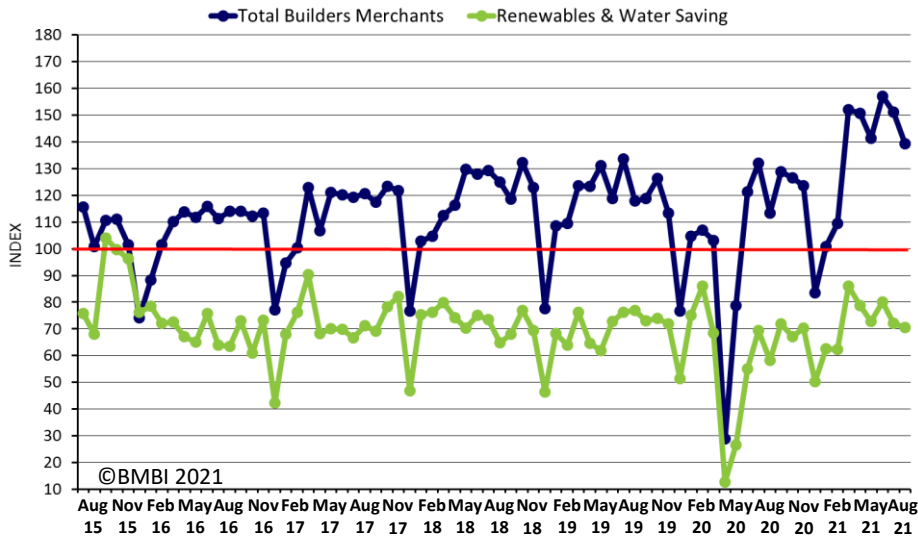
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: Indices

August 2021

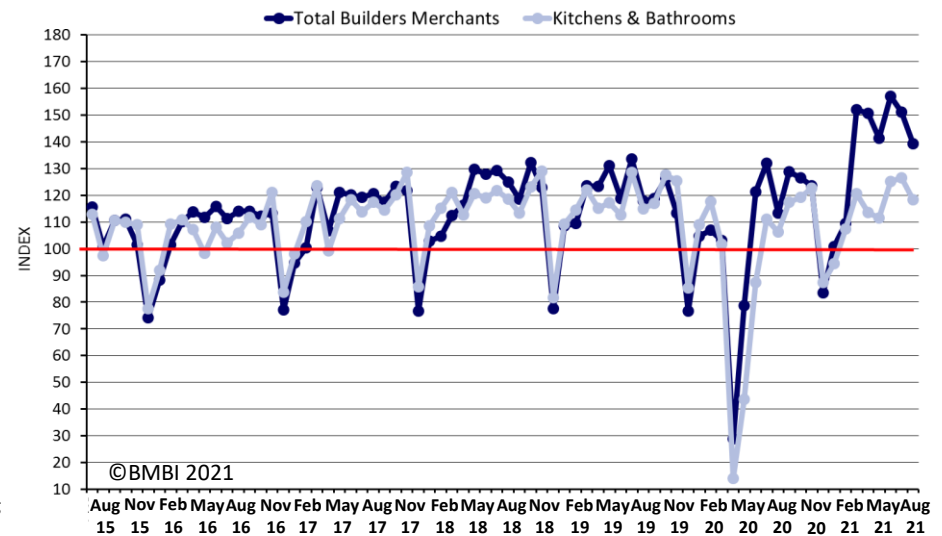


Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



Indexed on July 2014 – June 2015

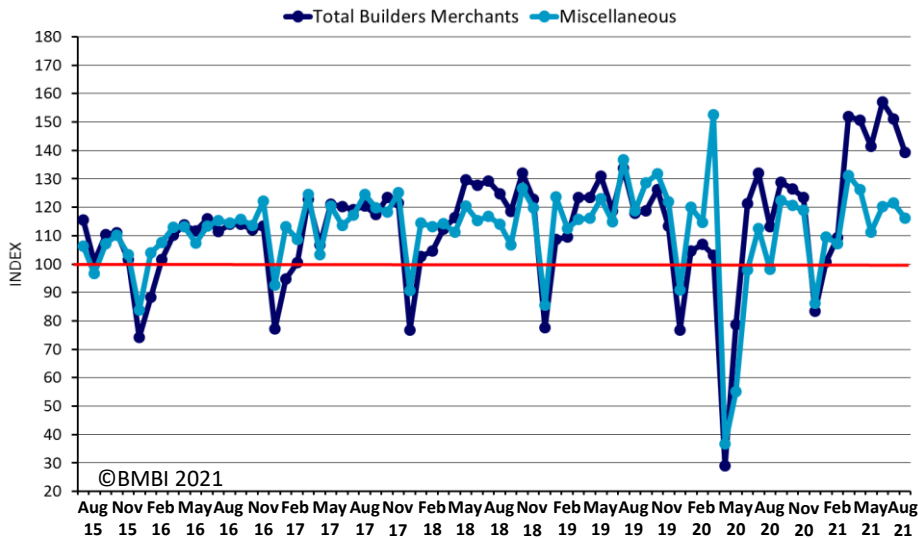
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to August 2021

Monthly: Indices

August 2021

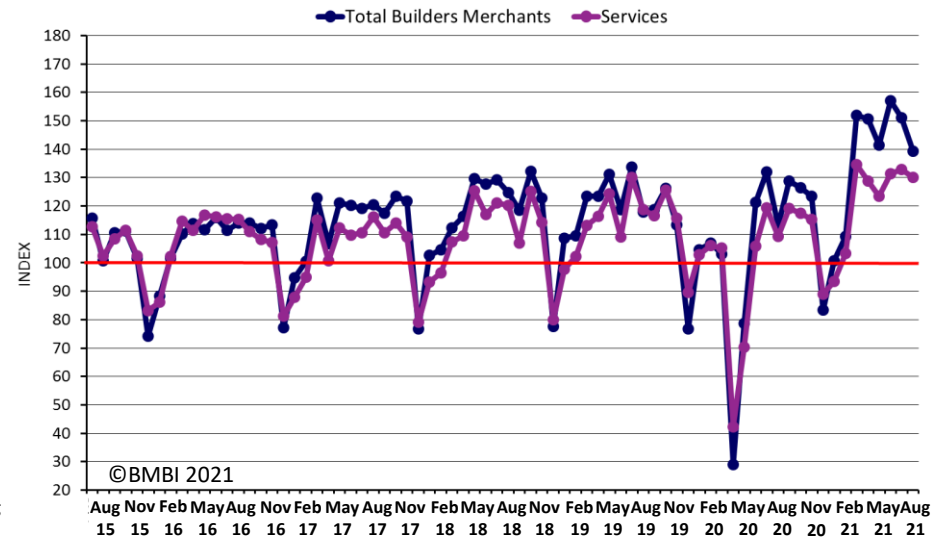


Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

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

Trading Days

Monthly

Index: 20.8

2015											
						Jul 22	Aug 20	Sep 22	Oct 22	Nov 21	Dec 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	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	20	19	22	21	21				

Quarterly

Index: 62.3

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	61	65	60
2021			
Q1	Q2	Q3	Q4
63	61		

Half Year

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
125	125
2021	
H1	H2
124	

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.

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

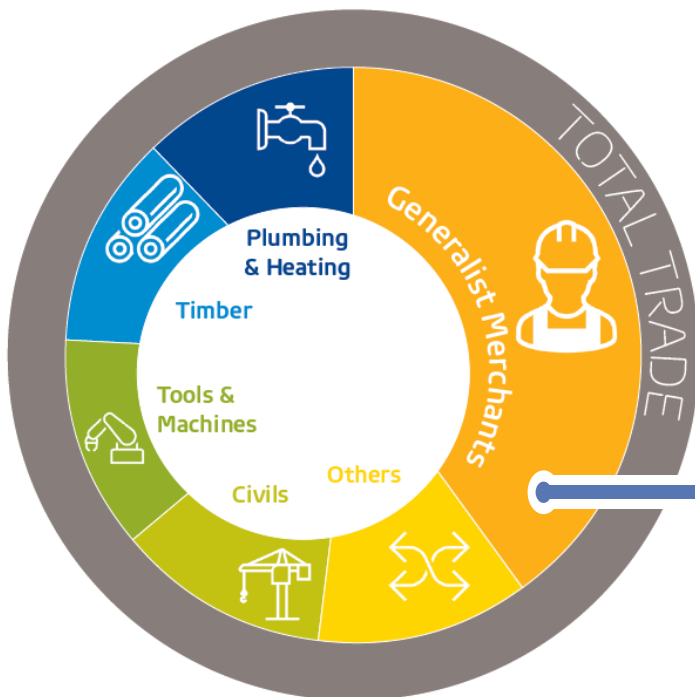
GfK's Definition of Builders Merchant Panel



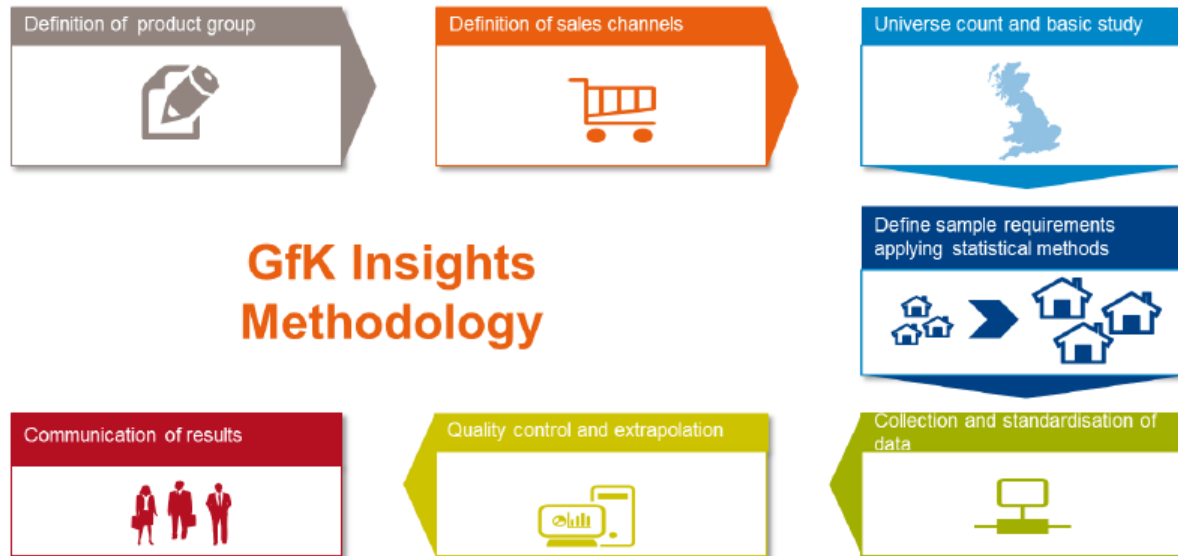
Generalist Builders Merchants definition:

- 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

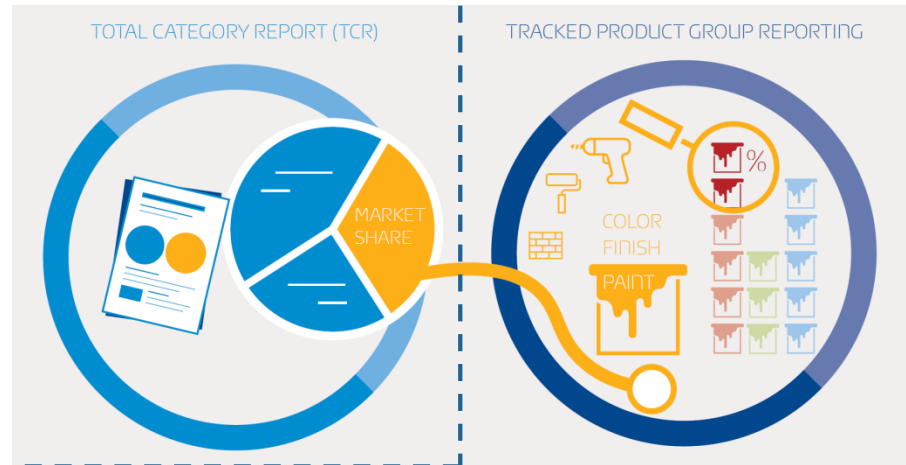
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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

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



August 2021

(Published 19 October 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 or Toby Aitken: toby.aitken@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.

Overview and Insights

August sales up 8.3% on August 2020 and up 0.8% on August 2019

Total plumbing and heating value sales, from over 80% of specialist Plumbing & Heating merchants throughout Great Britain, were up 8.3% in August 2021 compared to August 2020 (see [page 56](#)), with one more trading day this year. Like-for-like, average sales a day, which take trading day differences into account, were 3.2% higher. Compared with two years ago, absolute sales values in August 2021 were 0.8% higher than in August 2019, with no difference in trading days ([page 57](#)).

Total value sales in August were 6.6% lower than in July, with no difference in trading days ([page 58](#)).

August's PHMI Index, which contrasts sales with the base period of January to December 2019, was 93.0 – see the table on [page 54](#) and the chart on [page 55](#). The PHMI Index for the last three months (June to August) was slightly higher (97.3).

Sales in the three months June to August 2021 were 17.9% higher compared with the same three months last year, with one less trading day this year ([page 59](#)). Average sales a day were 19.7% higher.

Sales in June to August 2021 were up 2.7% on the same three months in 2019, with no difference in trading days.

Comparing the three months June to August 2021 with the previous 3 months (March to May) sales were 8.1% lower, with two more trading days in the most recent period ([page 60](#)). Like-for-like sales were down 11.0%.

Sales in the first eight months of 2021 were 29.2% higher than in January to August 2020, with two less trading days this year ([page 64](#)). Like-for-like sales were 30.7% higher.

Looking back two years, sales in the first eight months of 2021 were 2.9% ahead of January to August 2019, with two less trading days this year. Like-for-like sales increased by 4.1% ([page 65](#)).

Plumbing & Heating Merchants' sales in the 12 months September 2020 to August 2021 were 17.8% higher than in the same period a year earlier, with no difference in trading days ([page 66](#)).

Sales in the three months June to August 2021 were 17.9% higher compared with the same three months last year – and up 2.7% on the June to August 2019.

Indices: Monthly and quarterly

September 2020 to August 2021

(Indexed on January to December 2019)

Sep 20	Oct 20	Nov 20	Three months
103.0	115.2	111.1	109.8
Dec 20	Jan 21	Feb 21	Three months
83.9	99.4	102.4	95.2
Mar 21	Apr 21	May 21	Three months
118.2	101.8	97.4	105.8
Jun 21	Jul 21	Aug 21	Three months
99.2	99.6	93.0	97.3

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:

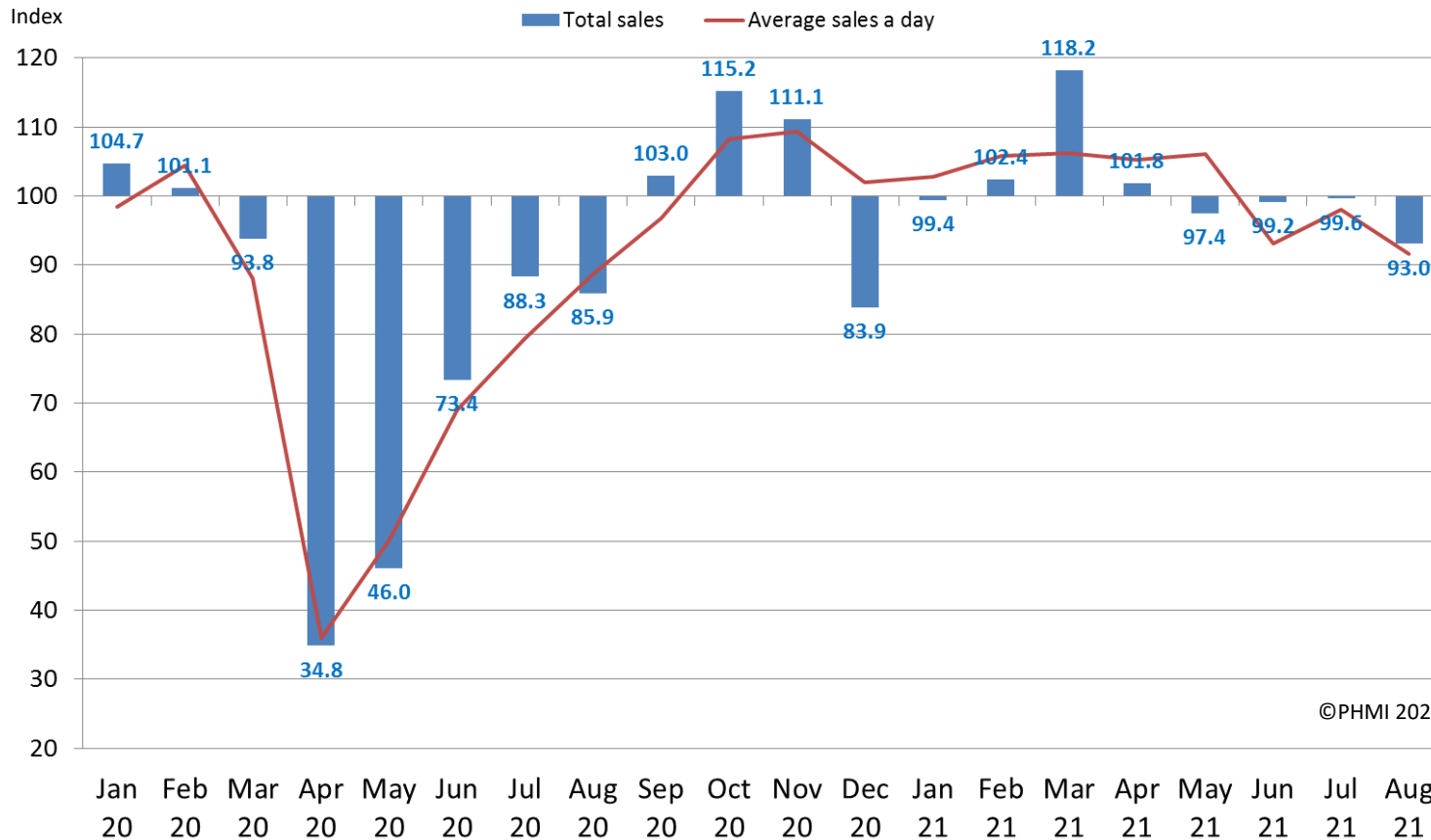
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. August's Index of 93.0 means turnover was 7.0% lower than the base period.

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

Monthly: Index

Adjusted and unadjusted for trading days*

Indices: January 2020 to August 2021



Values shown for Total sales

©PHMI 2021

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

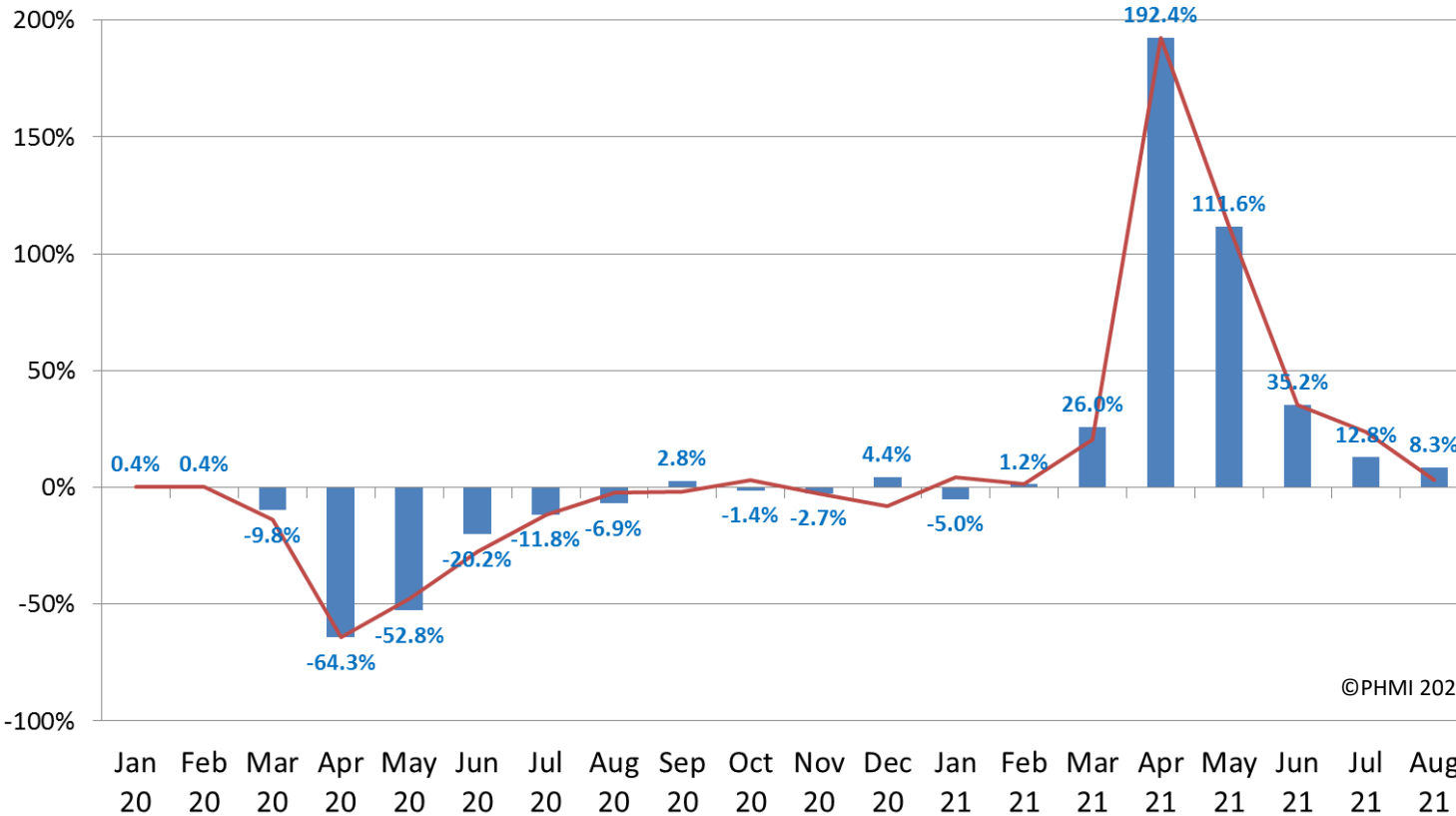
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted for trading days*

Month: year on year

■ Total sales — Average sales a day



Values shown for Total sales

©PHMI 2021

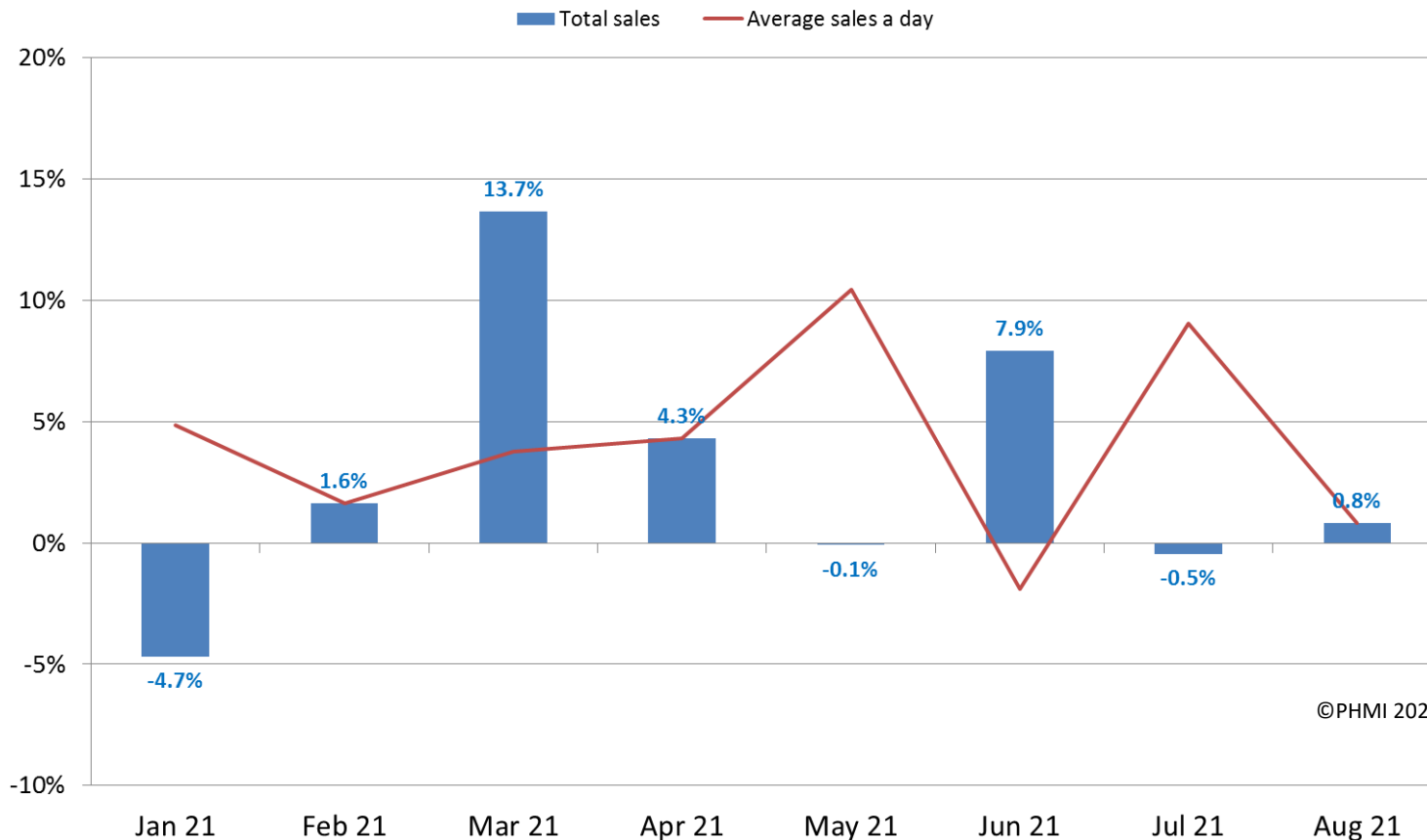
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

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

Monthly: This Year v 2019

Sales indices, adjusted and unadjusted for trading days*

Month: compared with 2019



Values shown for Total sales

©PHMI 2021

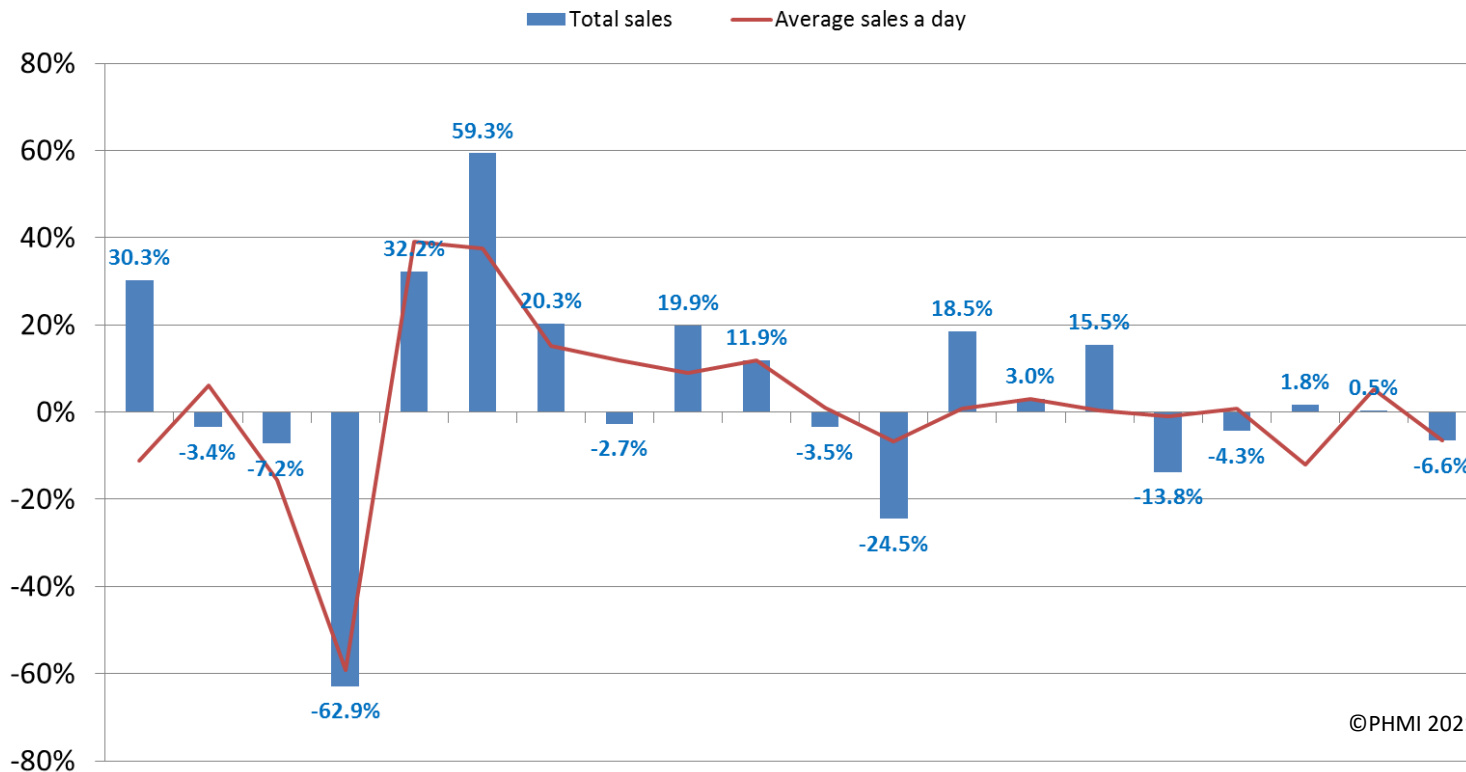
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

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

Monthly: Month v previous month

Sales indices, adjusted and unadjusted for trading days*

Month v previous month



Values shown for Total sales

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

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

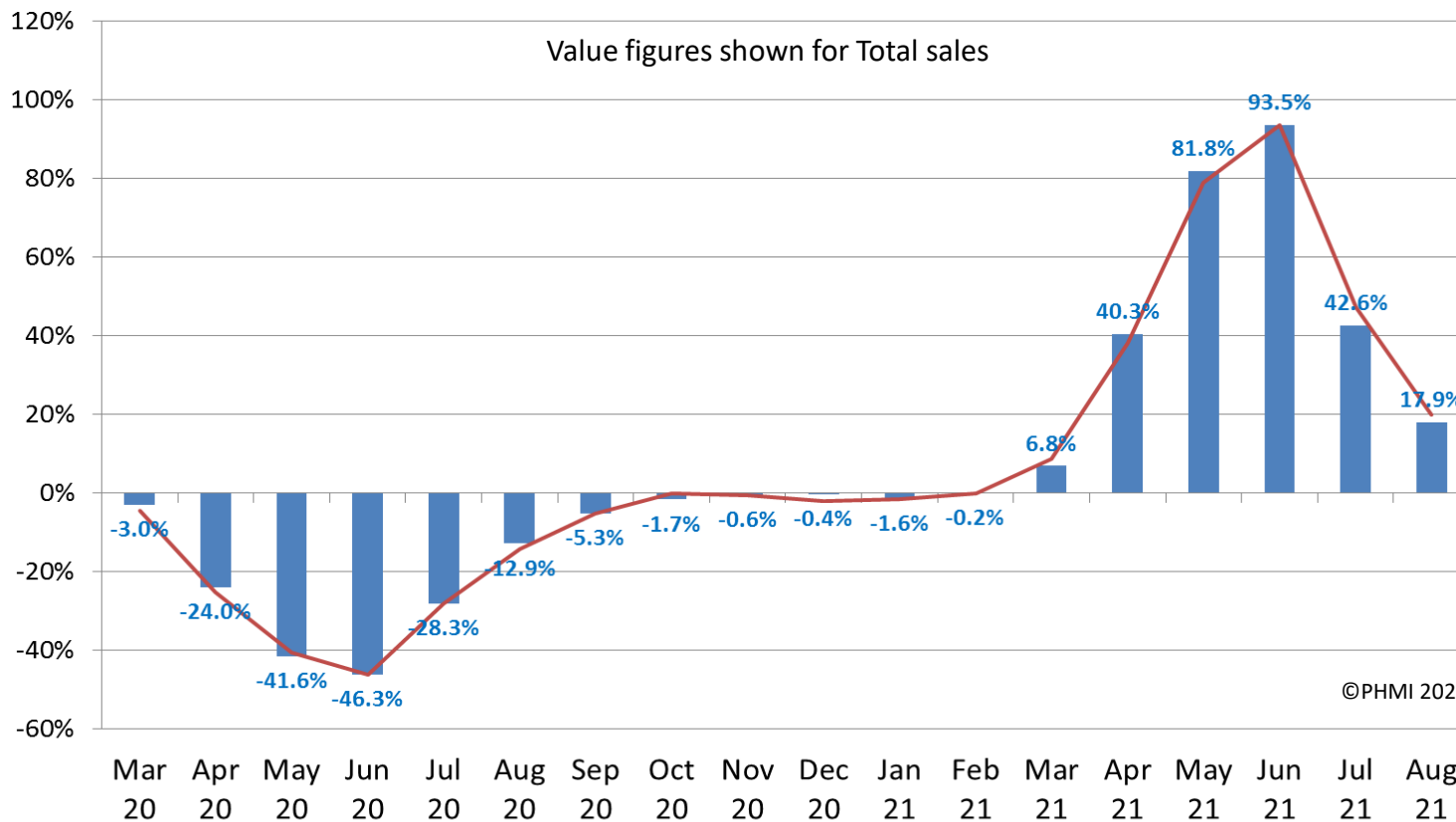
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted for trading days*

Rolling 3 months: year on year

■ Total sales — Average sales a day



Eg. August 21 shows sales in the three months June to August were 17.9% higher than the same three months last year.

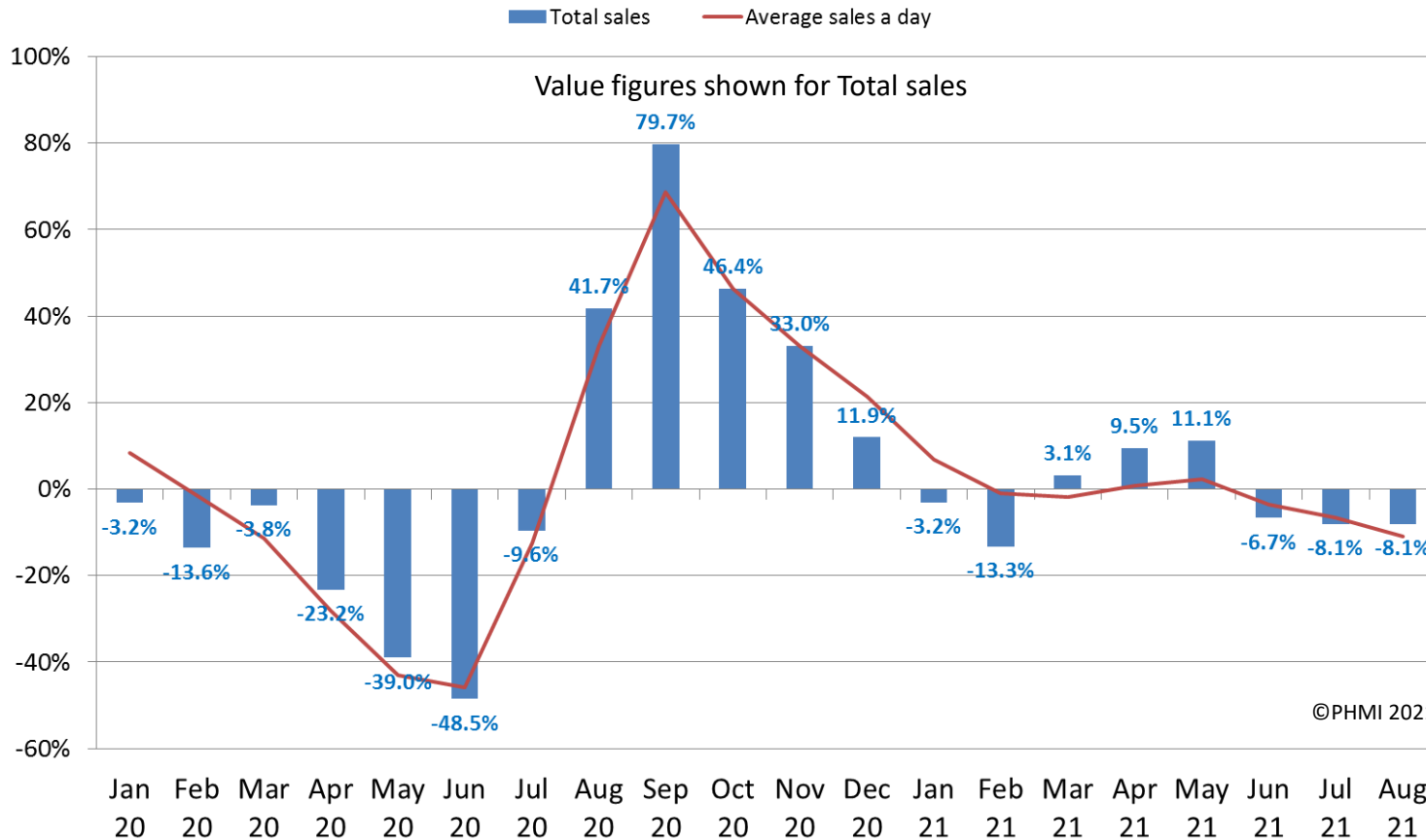
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

*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



Eg. August 21 shows the three months June to August were 8.1% lower than the three months March to May

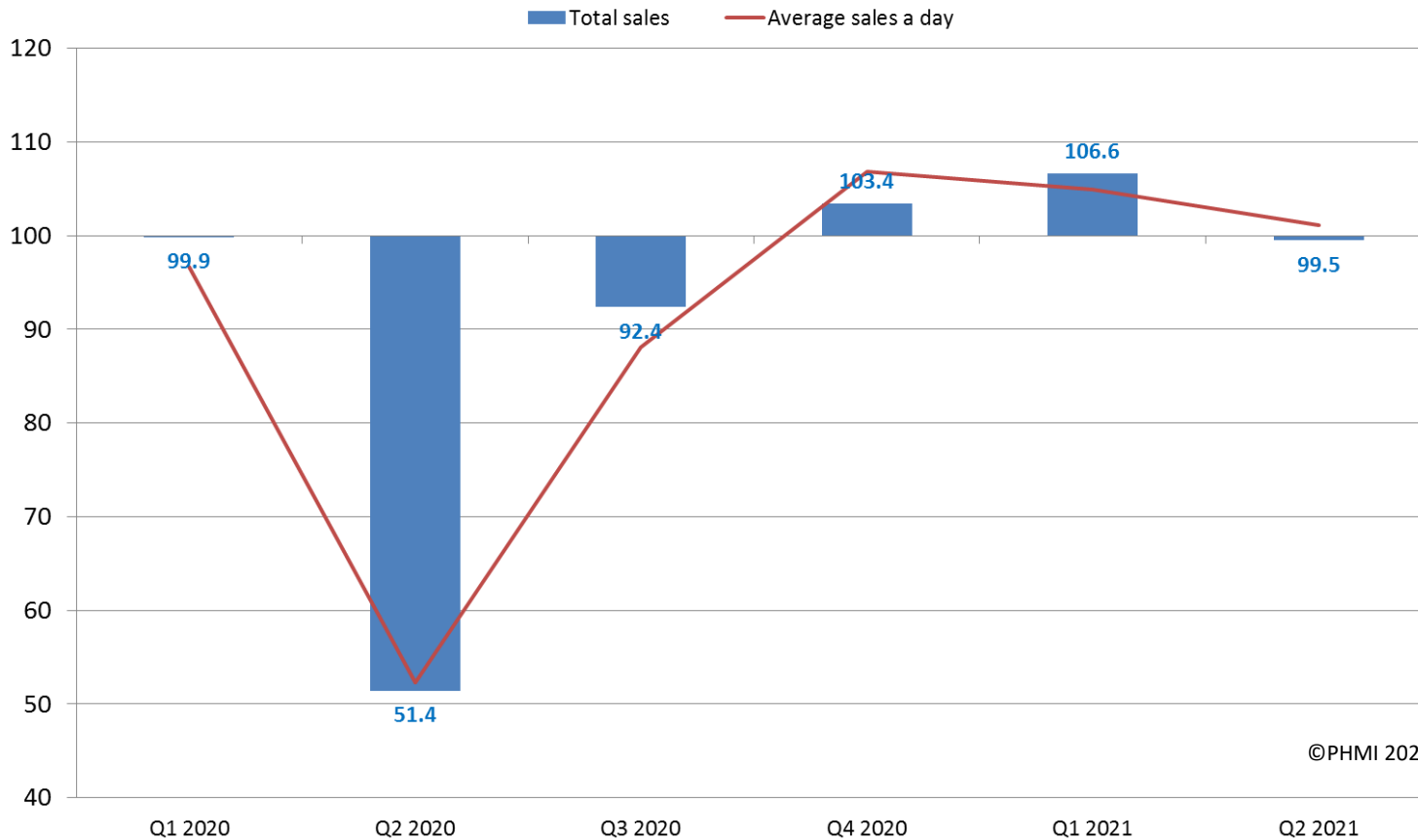
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

Quarterly: Index

Adjusted and unadjusted for trading days

Indices: Q1 2020 to Q2 2021



Value figures
shown for Total
sales

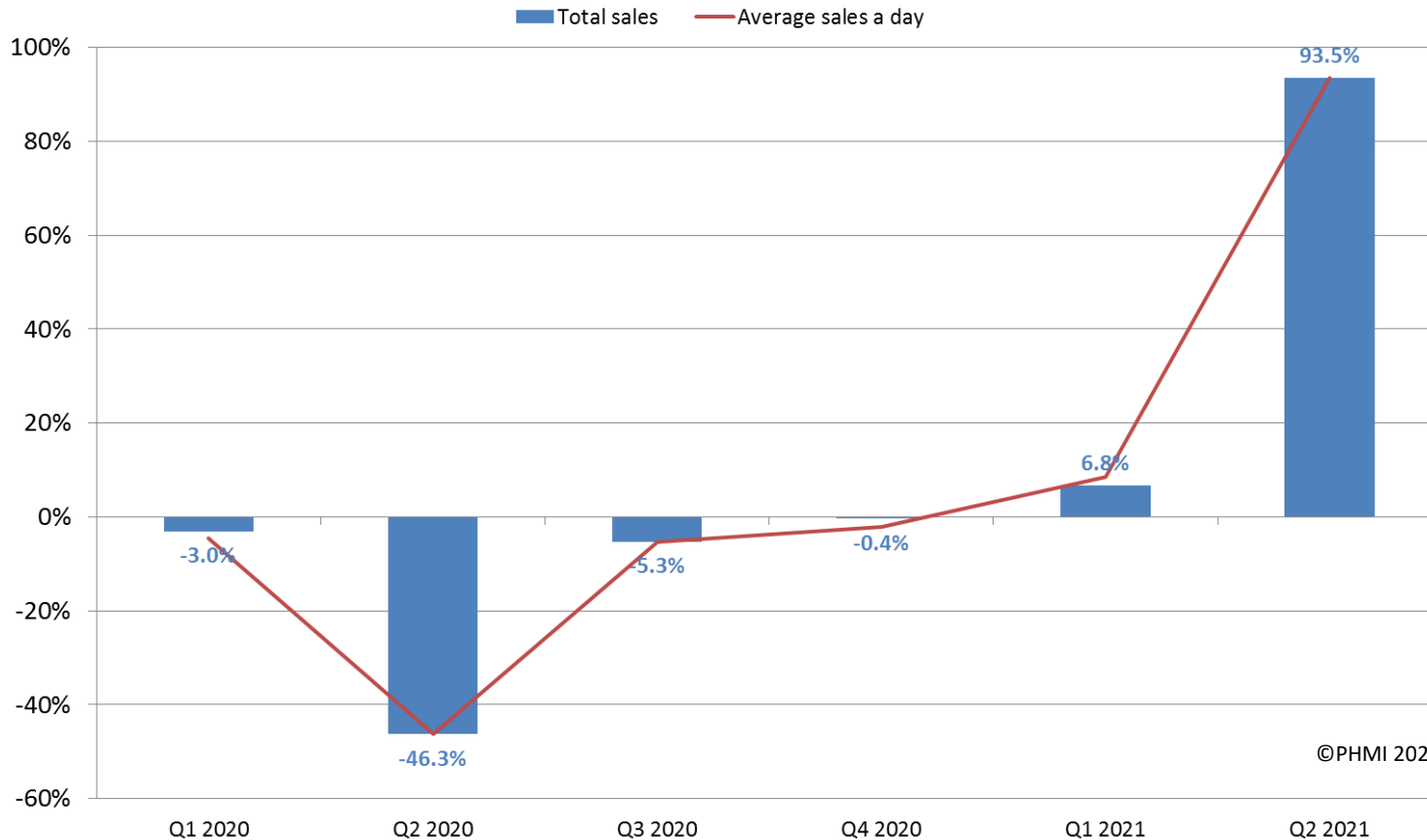
©PHMI 2021

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

Quarterly: Year on Year

Sales indices, adjusted and unadjusted for trading days*

Quarter: year on year



Value figures shown for Total sales

©PHMI 2021

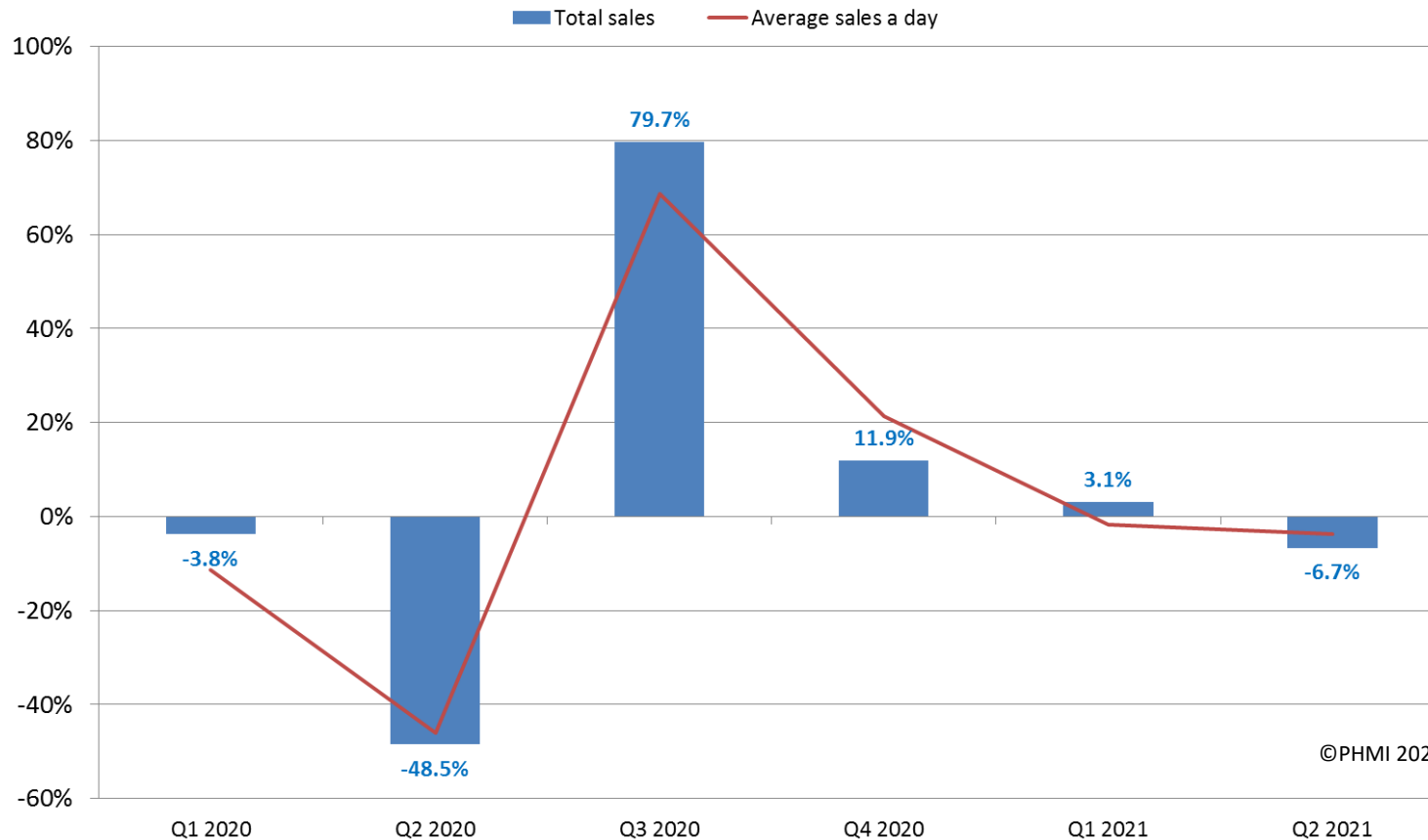
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Jun 2021

*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*

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 Jun 2021

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

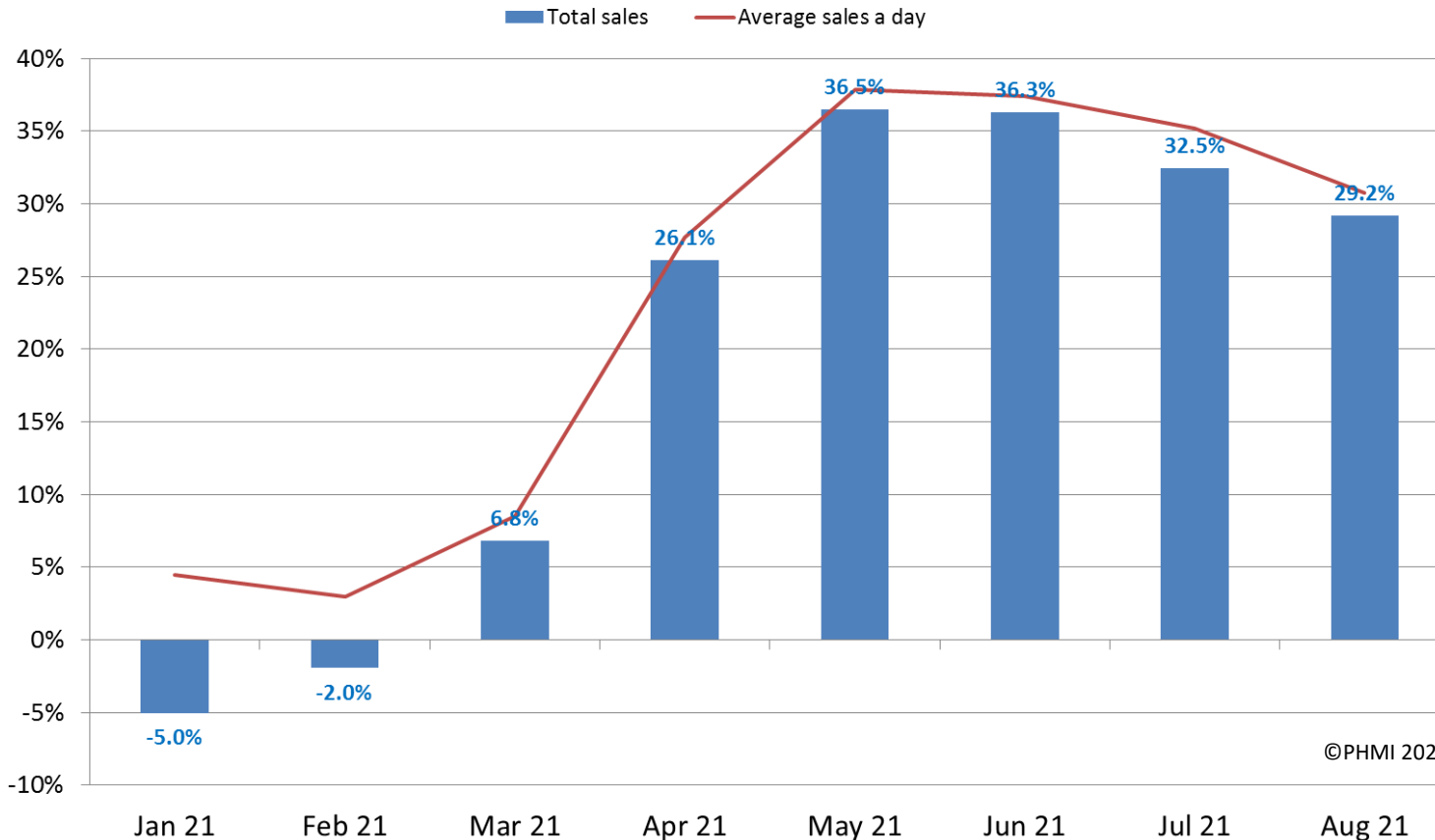
Year To Date: Year on year

Last 8 months sales indices, adjusted and unadjusted for trading days*

Plumbing & Heating Merchant Index



Cumulative year to date: Jan 21 to Aug 21 v last year



Value figures shown for Total sales

©PHMI 2021

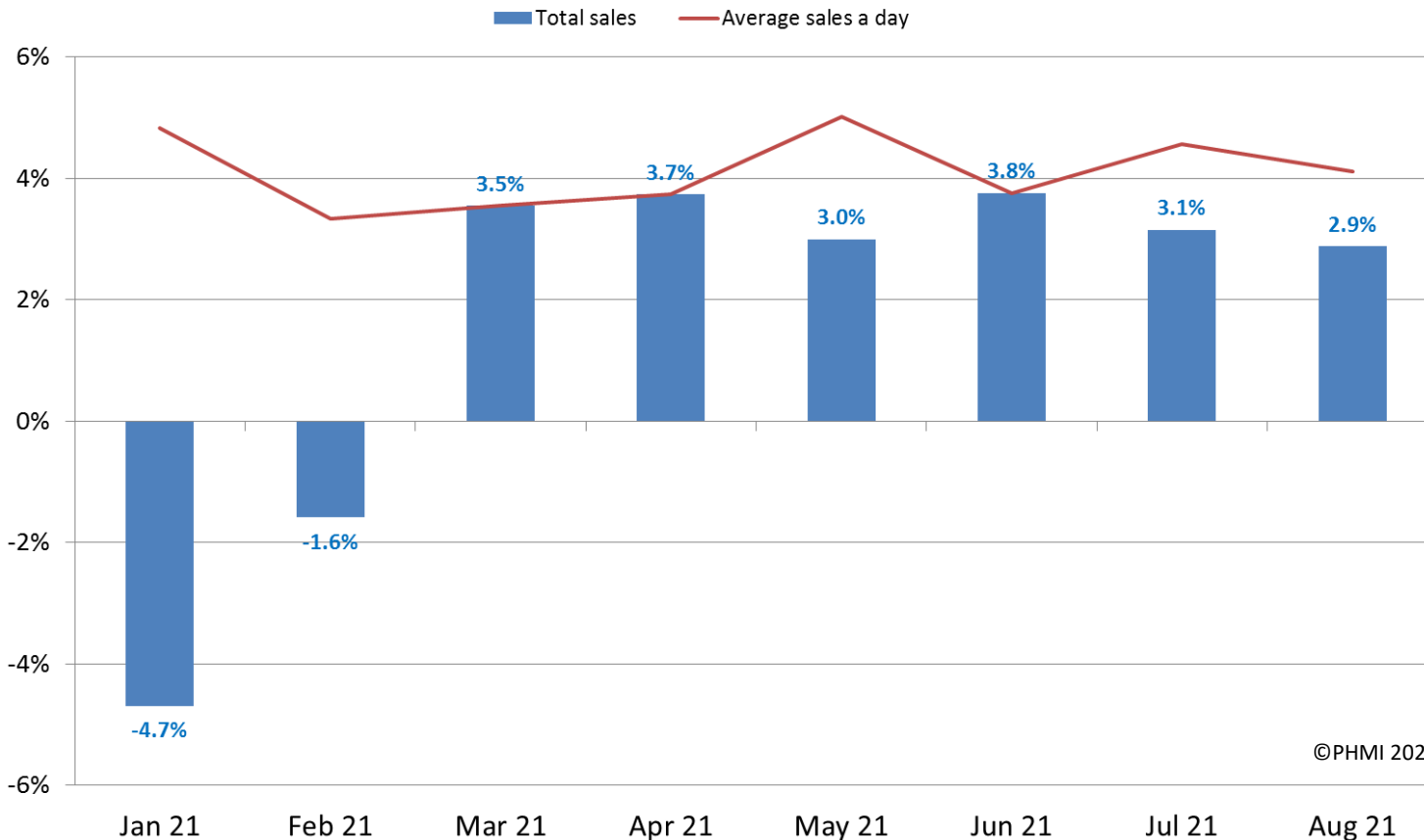
Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

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

Year To Date: 2021 v 2019

Last 8 months sales indices, adjusted and unadjusted for trading days

Cumulative year to date: 2-year comparison



Value figures shown for Total sales

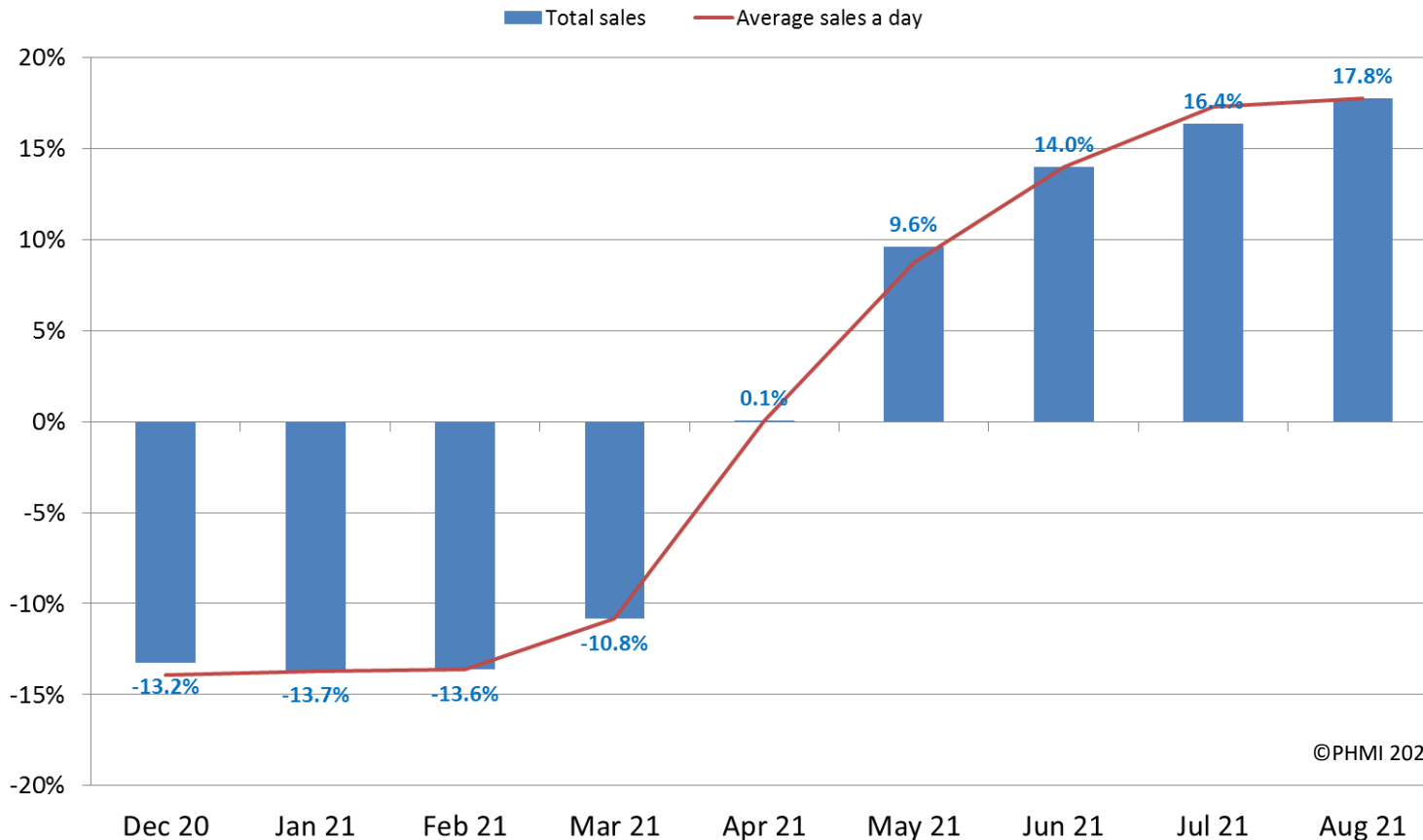
©PHMI 2021

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

Last 12 months: Year on year

Sales indices, adjusted and unadjusted
for trading days*

Rolling 12 months v previous 12 months



Value figures
shown for Total
sales

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

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

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	20	23	20	19	22	21	21				

Quarterly
Index: 62.3

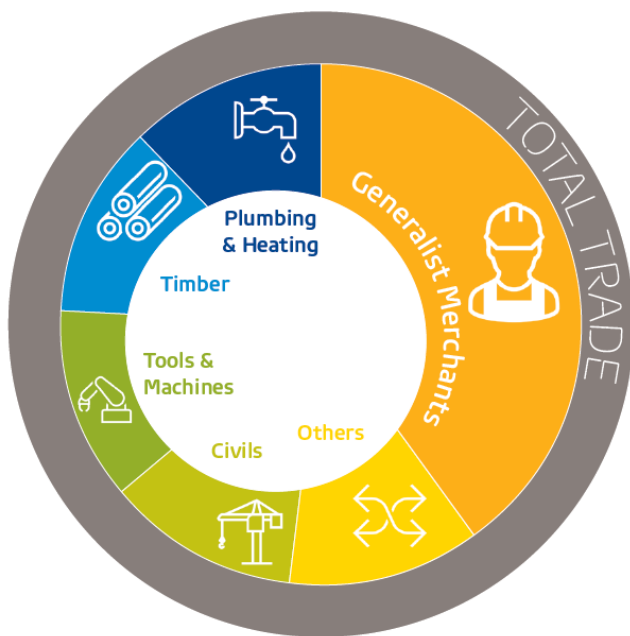
2020			
Q1	Q2	Q3	Q4
64	61	65	60
2021			
Q1	Q2	Q3	Q4
63	61		

Half Year		Full Year
2020		2020
H1	H2	250
125	125	
2021		2021
H1	H2	
124		

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

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 Toby Aitken or Ralph Sutcliffe:



Toby Aitken

Account Director

toby@mra-marketing.com

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Ralph Sutcliffe

Business Development
Director

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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

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in materials supply”



“building **excellence**
in materials supply”

BMF Forecast Report & BMF Sales Indicators

BMF Forecast Report

Autumn 2021 edition



Builders Merchants Industry Forecast Report

The eighth edition of the BMF's Builders Merchants Industry Forecast, covering Autumn 2021 onwards, is available now.

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 Autumn 2021 edition now available. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Sarup Ubhi on 024 7685 4994 or email: sarup.ubhi@bmf.org.uk



Contact us

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in materials supply"



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