

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**April 2021**

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A Builders Merchant Building Index Publication

# Building the Industry & Building Brands from Knowledge



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# 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).

# Overview and Insights

## Plumbing and heating merchants see big year-on-year gains in Covid-19 anniversary

The first anniversary of Covid-19 Lockdown 1 resulted in big year-on-year gains. Plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 192.4% in April 2021 compared with April 2020. That means merchants sold almost three times as much this April as they did in April last year. (See [page 58](#)).

Looking back over two years, it is possible to see how well the market performed – by benchmarking 2021 against more normal trading conditions and validating the strength of this year's trading. April 2021 was 4.3% higher than April 2019.

Value sales in April were 13.8% lower than in March ([page 59](#)), not helped by three fewer trading days this month. Average sales a day were 0.9% lower.

The latest three months (February to April) saw sales 40.3% higher than the same three months in 2020 ([page 60](#)), with one more trading day in 2021. Average sales a day were 38.1% higher.

Sales in February to April 2021 were 6.6% higher than in February to April 2019, with two more trading days this year. Average sales a day were 3.3% higher.

Comparing the same three months (February to April 2021) with the previous three months (November 2020 to January 2021) saw sales up 9.5% ([page 61](#)), helped by five additional trading days. Average sales a day for February to April, which takes trading day differences into account, were 0.9% higher.

Year to date sales, which cover the four months January to April 2021, were 26.1% higher than in the same four months last year, with one less trading day. Average sales a day were up 27.7%.

Plumbing & Heating Merchants sales in the 12 months May 2020 to April 2021 were almost identical to the same period a year earlier, gaining 0.1%.

April's PHMI Index, which contrasts sales with the base period of January to December 2019, was 101.8 – see the table on [page 56](#) and the chart on [page 57](#). The table also shows the PHMI Index in the last three months (February to April) was marginally higher, at 107.5.

Plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 192.4% in April 2021 compared with April 2020. That means merchants sold almost three times as much this April as they did in April last year.

# Indices: Monthly and quarterly

May 2020 to April 2021

(Indexed on January to December 2019)

<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
<b>Feb 21</b>	<b>Mar 21</b>	<b>Apr 21</b>	<b>Three months</b>
102.4	118.2	101.8	107.5

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:

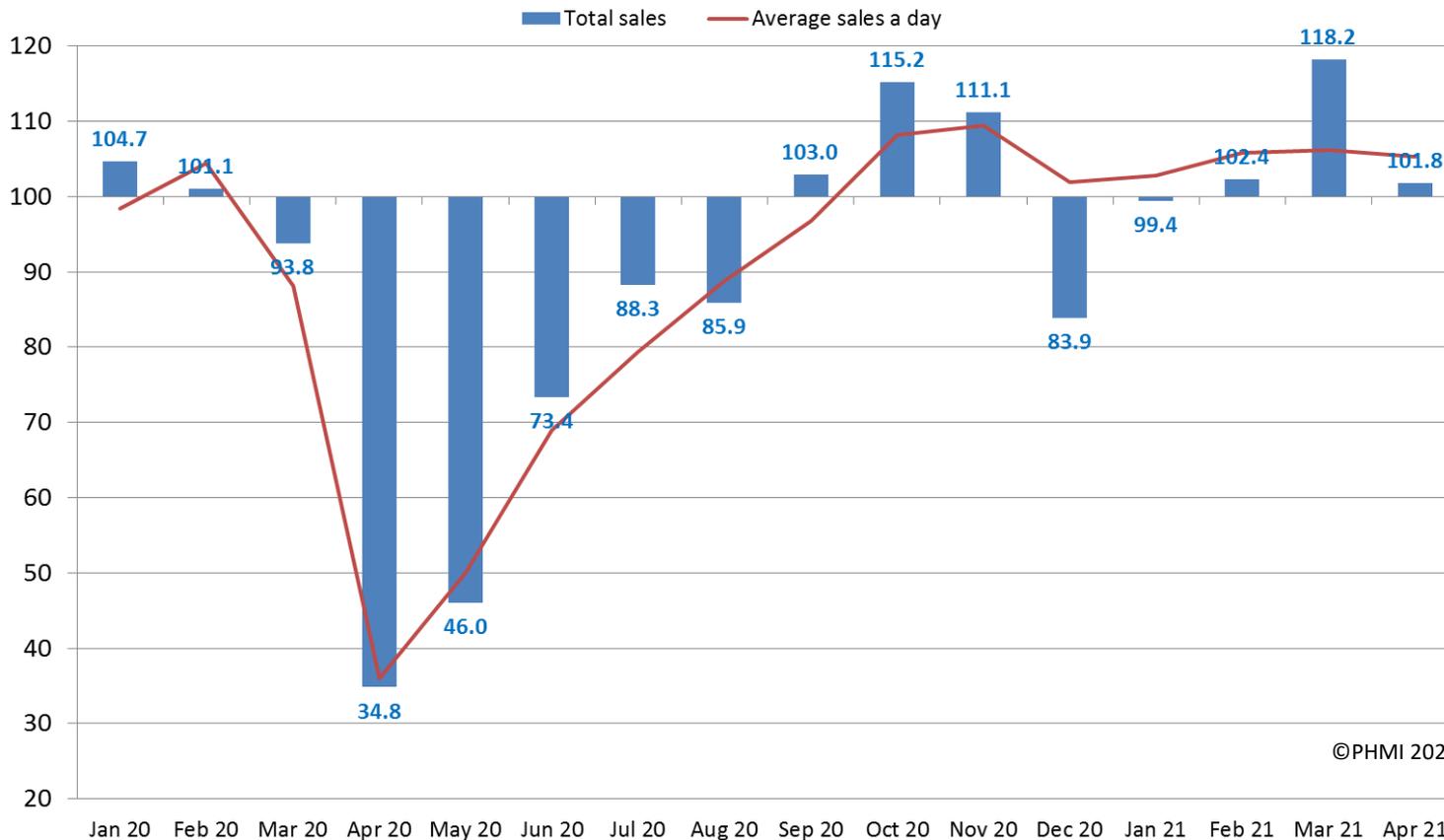
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. January's Index of 99.4 means turnover was 0.6% lower than the base period.

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

# Monthly: Index

Adjusted and unadjusted for trading days\*

## Indices: January 2020 to April 2021



Value figures  
shown for Total  
sales

©PHMI 2021

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

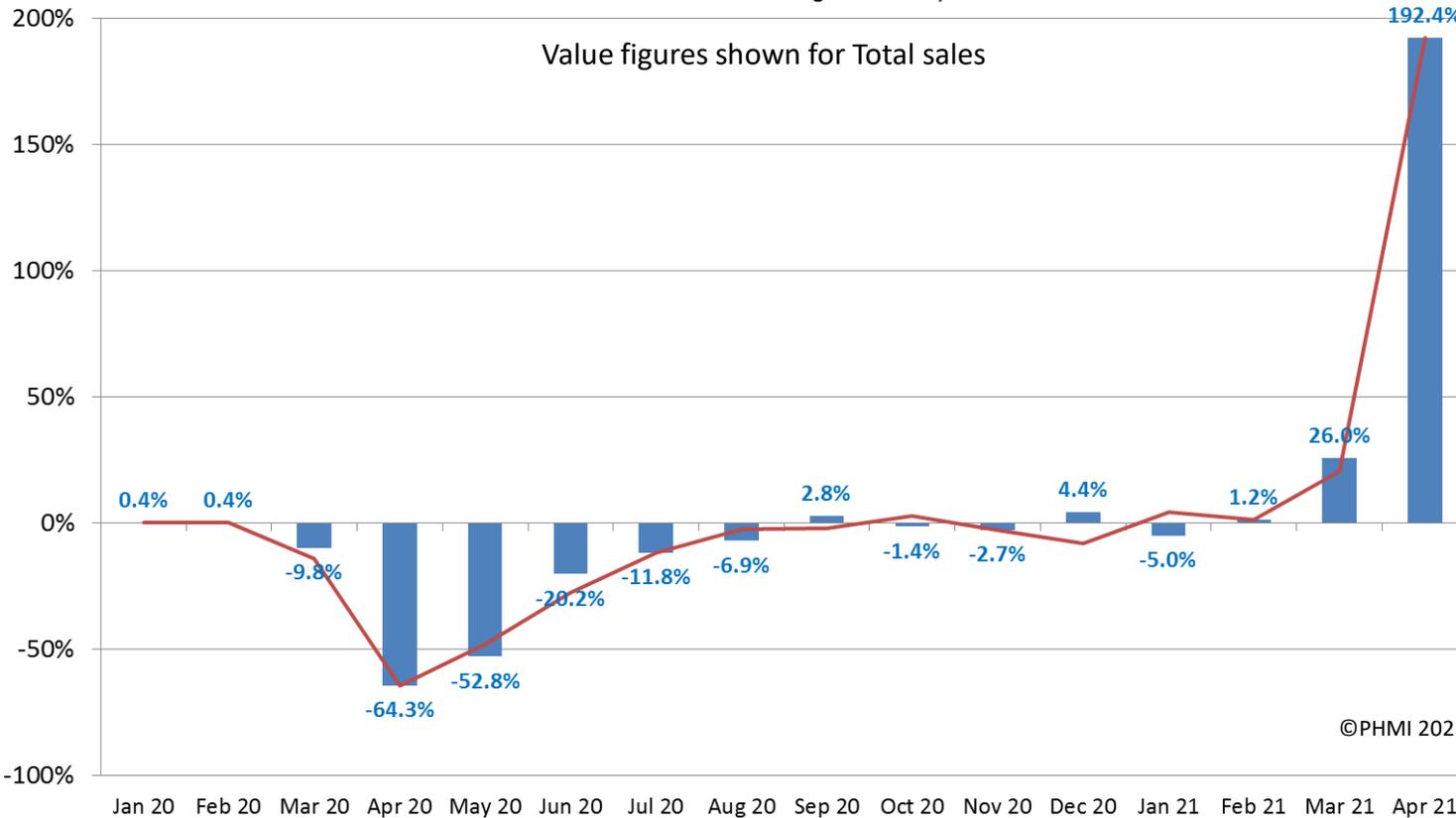
# Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted for trading days\*

## Month: year on year

■ Total sales — Average sales a day

Value figures shown for Total sales



+192.4% is almost three times last year's value sales.

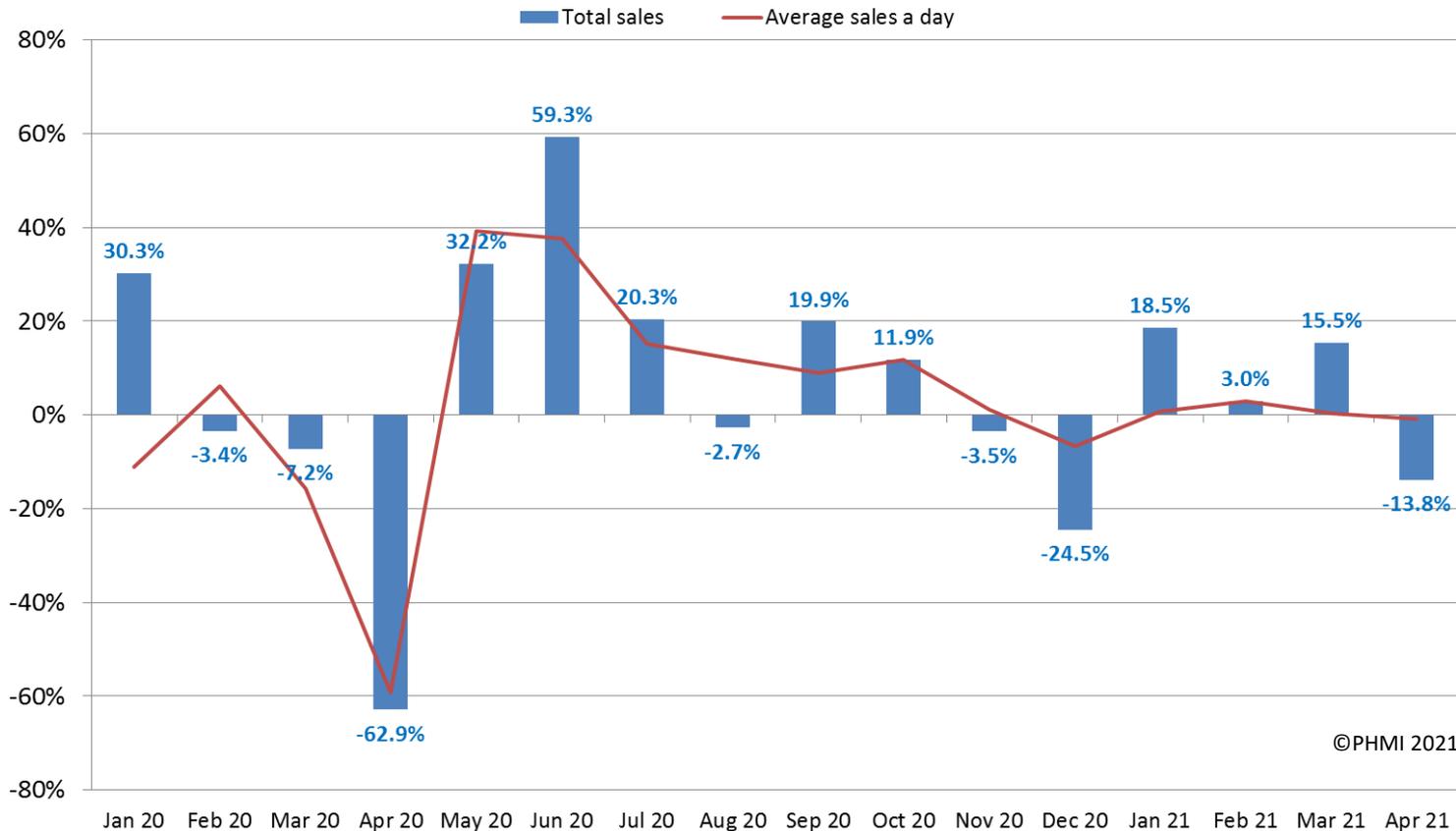
©PHMI 2021

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

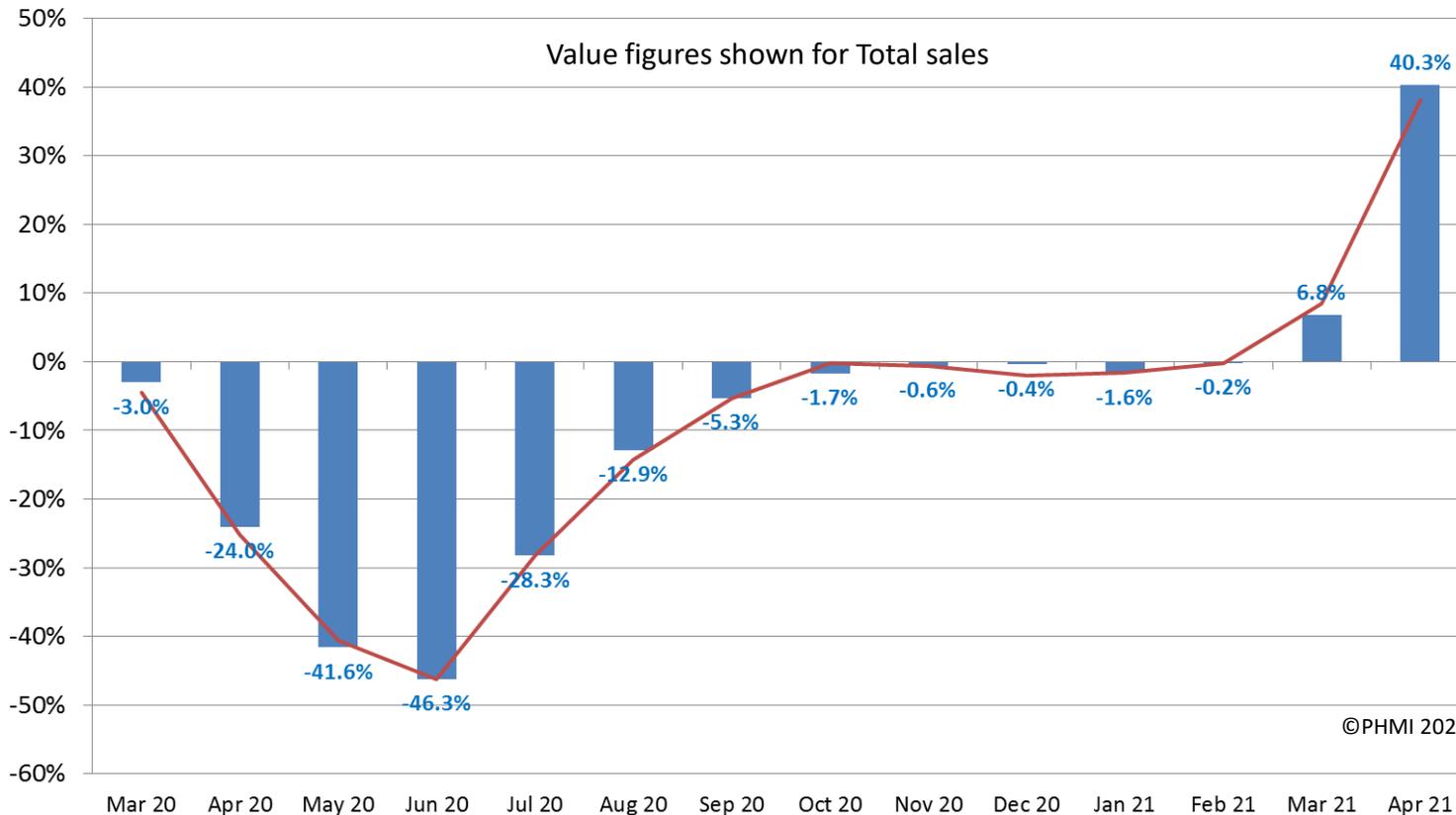
 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Apr 2021

# 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. Apr 21 shows the three months Feb-Apr were 40.3% higher than the same three months last year.

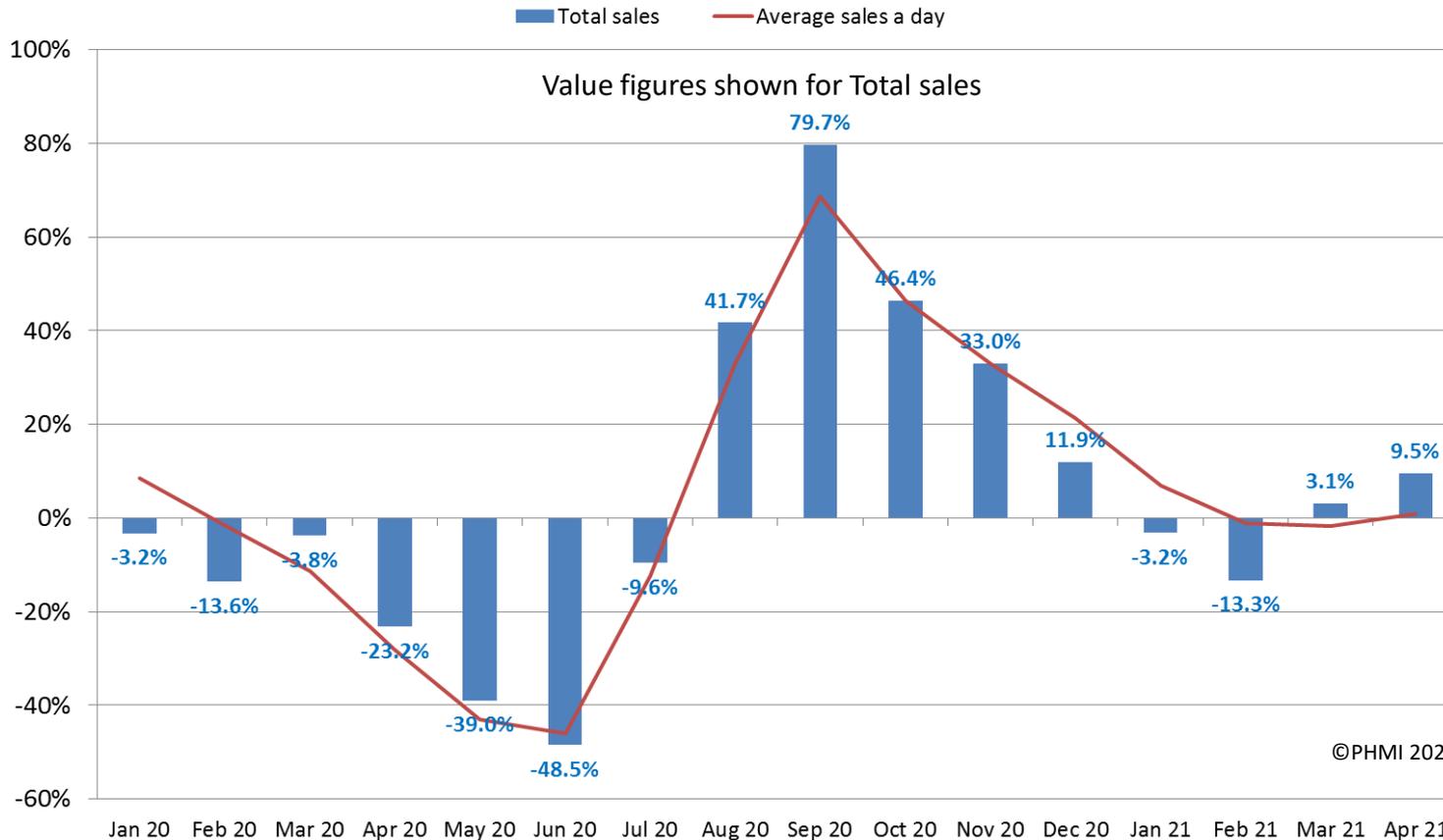
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

# Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted  
for trading days\*

## Rolling 3 months v previous 3 months



Eg. Apr 21 shows the three months Feb-Apr were 9.5% higher than the three months Nov 20 to Jan 21

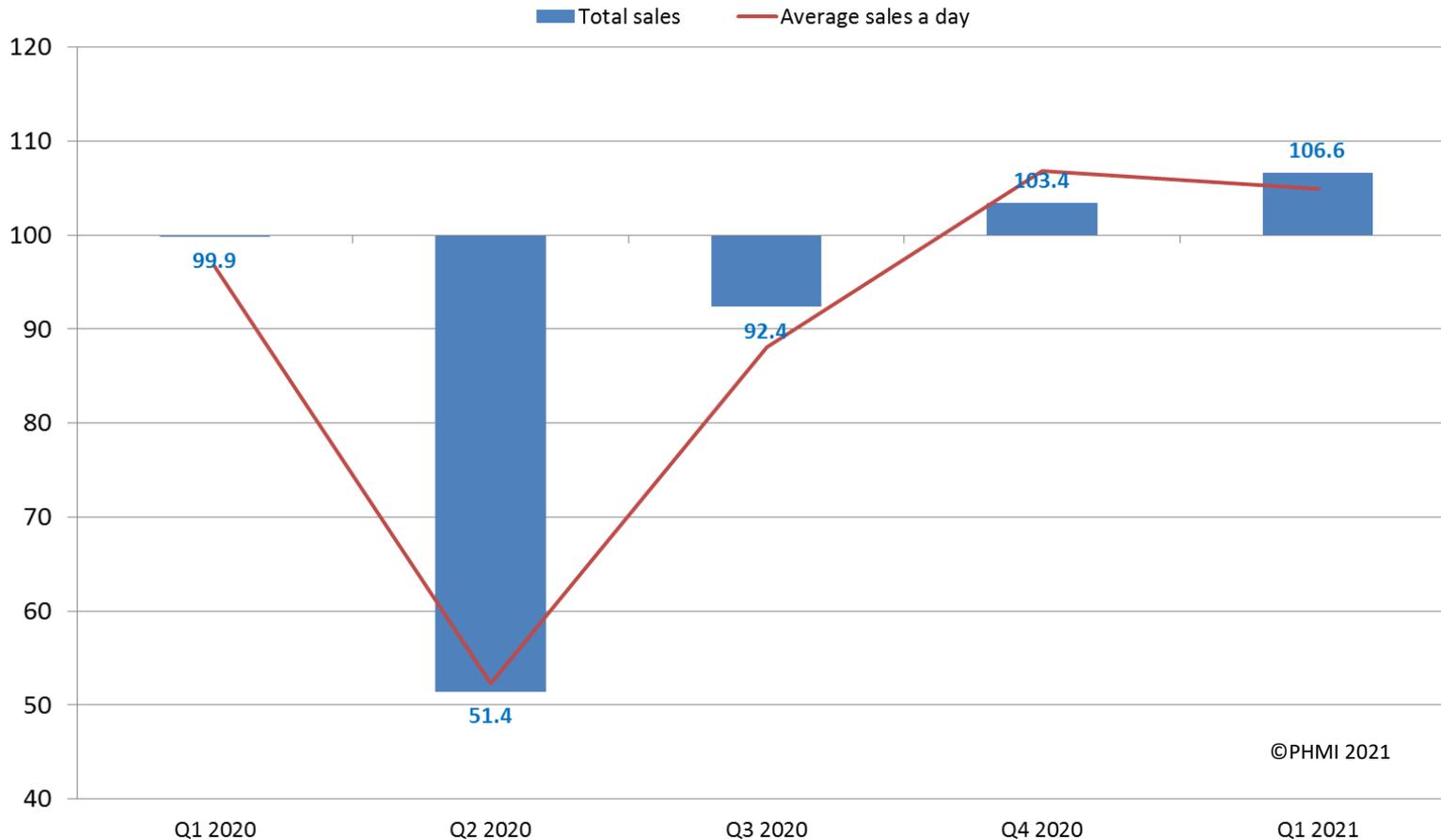
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 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Apr 2021

# Quarterly: Index

Adjusted and unadjusted for trading days

## Indices: Q1 2020 to Q1 2021



Value figures  
shown for Total  
sales

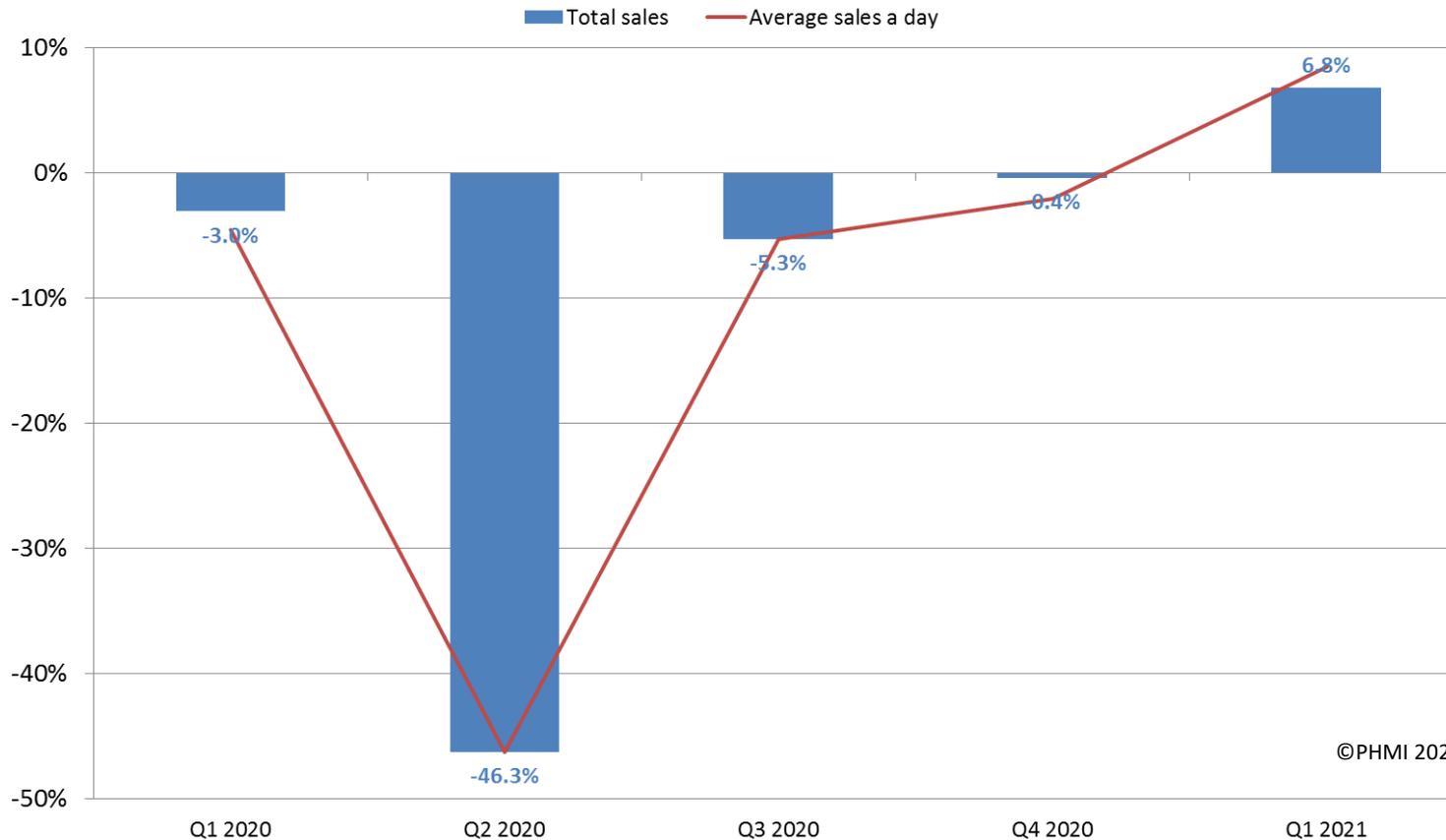
©PHMI 2021

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

# 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 Mar 2021

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

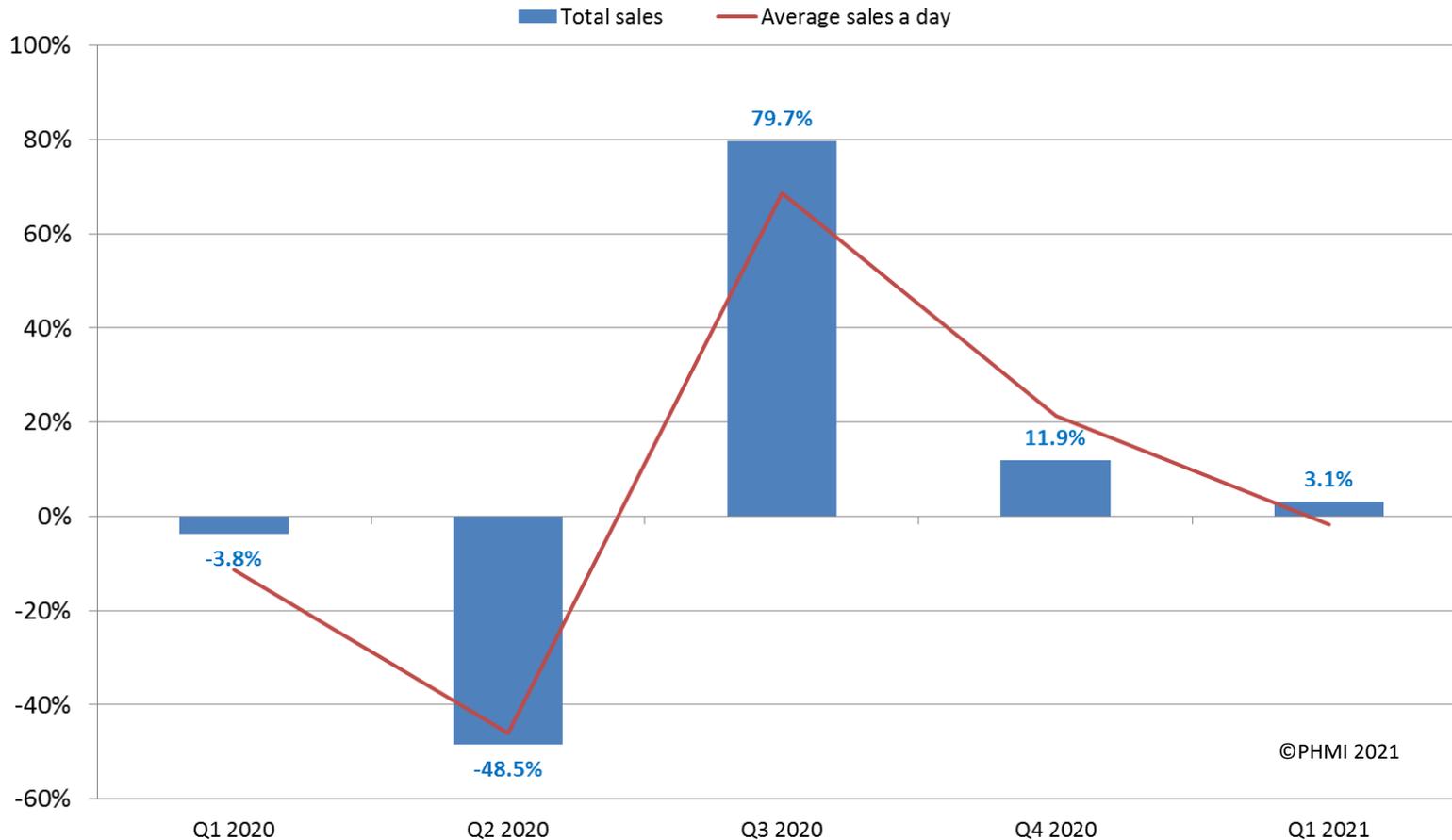
# Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted  
for trading days

Plumbing & Heating  
Merchant Index



## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

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

## Quarterly

Index: 62.3

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

## Half Year

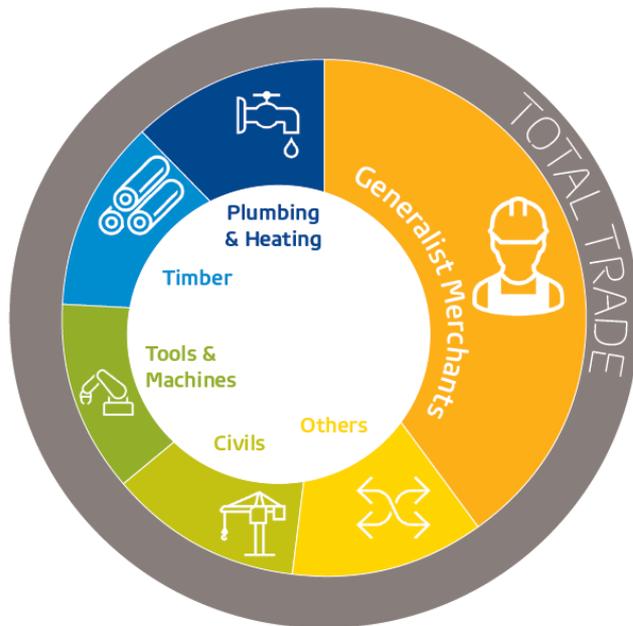
2020	
H1	H2
125	125
2021	
H1	H2

## 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:



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## More data available

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