

“building **excellence**
in materials supply”

Including
**Plumbing & Heating
Merchant Index**
See page 54

Builders Merchant Building Index



Monthly report for May 2021

(Published 19 July 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 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.

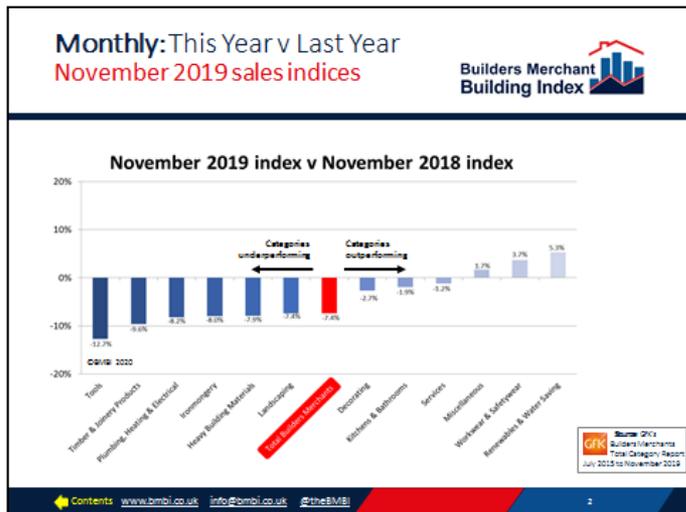
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

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.

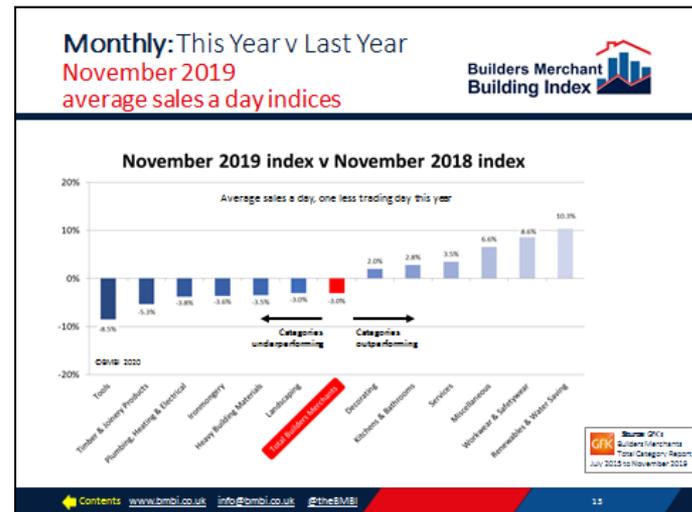
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

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, the 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.

Solid growth continues amid first anniversary of Covid-19 Lockdown 1

After a near total shutdown in April 2020, confused Government messaging meant it took time for the industry to understand it was deemed essential and to get back to work. As a result, Total Builders' Merchants' sales in May 2020 were almost 40% below May 2019. Against this background, May 2021 sales show significant growth compared with last year – although not reaching the dizzying levels seen last month. This report includes comparisons with 2019, to put May's performance into context.

Year-on-Year

Total Builders Merchants May 2021 value sales were up 79.6% in May compared with the same month last year, with no difference in trading days. All categories sold more. Tools (+180.0%) did best, having been the weakest category in May 2020. Six of the remaining 11 categories more than doubled their sales this year, including Kitchens & Bathrooms (+154.9%), Plumbing Heating & Electrical (+118.1%) – both of which were particularly weak in May 2020 – and Timber & Joinery Products (+115.1%). Four categories did less well than Total Merchants, including Heavy Building Materials (+63.8%), Landscaping (+44.5%) and weakest category Workwear & Safetywear (+43.9%).

May 2021 v May 2019

Compared with two years ago, Total Merchants sales were up 7.9% in May 2021, with two less trading days this year. Only three of the twelve categories sold more, led by Timber & Joinery Products (+28.1%) and Landscaping (+26.5%). The remaining nine categories sold less, including Tools (-5.0%), Plumbing Heating & Electrical (-5.4%) and Decorating (-6.8%). Average sales a day were 19.3% higher overall, with all categories other than Miscellaneous (-0.1%) selling more.

Month-on-Month

Total sales in May were 6.1% lower than in April, with one less trading day this month. All categories sold less. Six categories did better than Total Merchants, with Timber & Joinery Products and Kitchens & Bathrooms doing best, although both down by -1.8%. Landscaping (-14.2%) was weakest. Average sales a day in May were 1.2% lower than April.

Last three months, year on year

Total sales in March to May 2021 were 110.6% higher than the same three months in 2020, helped by one more trading day this year. Tools (+179.7%) was strongest, followed by Timber & Joinery Products (+147.3%) and Landscaping (+130.8%). Only four categories failed to at least double their sales this year, with Workwear & Safetywear (+30.7%) having the smallest growth. Average sales a day across all merchants were 107.2% higher.

Overview continues on the next page...

Total Builders Merchants May 2021 value sales were up 79.6% in May compared with the same month last year. All categories sold more. Tools (+180.0%) did best.

Compared with two years ago, Total Merchants sales in May 2021 were up 7.9%.

Overview - 2

...Overview continued from the previous page:

Last 3 months v 2019

Total Builders Merchants sales in March to May 2021 were 17.5% higher than the same three months in 2019, with no difference in trading days. Landscaping (+50.3%) did best, with Timber & Joinery Products (+33.5%) also doing well. Most categories were ahead, though less strikingly, including Heavy Building Materials (+9.9%) Ironmongery (+7.4%) and Plumbing Heating & Electrical (+0.7%). Only Kitchens & Bathrooms (-2.4%) sold less this year.

Year to date

In the first five months of 2021, Total Merchants sales were 54.9% up on January to May 2020, with one less trading day this year. All categories sold more. Landscaping (+82.9%) has been strongest this year, followed by Timber & Joinery Products (+78.8%) and Tools (+68.4%). Heavy Building Materials (+45.3%), Kitchens & Bathrooms (+41.8%) and Decorating (+38.4%). Workwear & Safetywear (+12.5%) grew less strongly. Average sales a day were up 56.4%.

Year to date v 2019

Looking back two years, sales in the first five months of 2021 were a remarkable 9.7% up on January to May 2019, with two less trading days this year. Overall growth was driven by Landscaping (+38.3%) and Timber & Joinery Products (+22.8%). Six categories increased less, including Workwear & Safetywear (+9.5%), Heavy Building Materials (+3.5%) and Tools (+0.4%). The remaining four categories sold less, with Kitchens & Bathrooms (-5.3%) weakest. Average sales a day were up 11.9%.

MAT

Overall sales in the 12 months June 2020 to May 2021 were 20.8% higher than in the same 12 months a year earlier, with two more trading days in the most recent period. All categories sold more. Landscaping (+48.4%) had the highest growth over the past 12 months., with Timber & Joinery Products (+31.2%) also strong. Ten categories grew more slowly, including Tools (+17.9%), Heavy Building Materials (+16.5%) and Kitchens & Bathrooms (+8.5%). Average sales a day were up 19.8% overall.

Index

May's BMBI index was 141.4, with two less trading days. Nine of the twelve categories exceeded 100. Seasonal category Landscaping (220.5) was significantly ahead, with Timber & Joinery Products (173.2) the second-strongest. These were the only two sectors that out-performed Total Merchants. Heavy Building Materials (128.6), Ironmongery (127.0) and Plumbing Heating & Electrical (112.9) were among seven categories having lower growth. Tools (98.2), Workwear & Safetywear (95.8) and Renewables (72.7) fell back. May's average sales a day BMBI index was 154.4.

In the first five months of 2021, Total Merchants sales were 54.9% higher than in January to May 2020 – and 9.7% higher than in January to May 2019. In both instances, Landscaping was the top-performing category.

The Expert Panel

Speaking for their markets - 1

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

The Q1 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: Q1 2021 Report](#)

Expert for Bricks & Roof Tiles:



Kevin Tolson,
Commercial Director
Wienerberger UK

[Read latest Comment: Q1 2021 Report](#)

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

[Read latest Comment: Q1 2021 Report](#)

Expert for Civils & Green Infrastructure:



Steve Durdant-Hollamby,
Managing Director
Polypipe Civils

[Read latest Comment: Q1 2021 Report](#)

Expert for Lead:



Lynn Street
Sales & Marketing Manager
Midland Lead

[Read latest Comment: Q1 2021 Report](#)

Expert for Wood-Based Panels:



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

[Read latest Comment: Q1 2021 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q1 2021 Report](#)

Expert for PVC-U Windows & Doors:



Kevin Morgan
Group Commercial Director
The Crystal Group

[Read latest Comment: Q1 2021 Report](#)

Expert for Shower Enclosures and Showering:



Mick Evans
Operations Director
Lakes

[Read latest Comment: Q1 2021 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q1 2021 Report](#)

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Hanson Cement

[Read latest Comment: Q1 2021 Report](#)

Expert for Paint:



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

[Read latest Comment: Q1 2021 Report](#)

Expert for Website & Product Data Management Solutions:



Andy Scothern
Managing Director
eCommonSense

[Read latest Comment: Q1 2021 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q1 2021 Report](#)

Monthly: Index and Categories

May 2020* – May 2021

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



		2020								2021				
MONTHLY SALES VALUE INDEX	Index	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Total Builders Merchants	100	78.7	121.4	131.9	113.3	128.7	126.4	123.5	83.5	100.7	109.4	151.9	150.6	141.4
Timber & Joinery Products	100	80.5	126.7	140.3	120.6	139.3	141.1	139.9	95.2	120.0	128.8	175.7	176.3	173.2
Heavy Building Materials	100	78.5	116.4	125.6	108.6	125.4	122.8	119.4	78.1	95.9	102.0	141.3	137.4	128.6
Decorating	100	54.8	94.4	112.4	100.1	113.1	111.7	110.5	76.2	85.8	95.7	121.7	113.2	106.5
Tools	100	35.1	79.3	99.0	85.8	98.5	101.0	100.0	70.9	84.4	93.7	120.8	110.7	98.2
Workwear & Safetywear	100	66.6	98.2	131.7	98.4	111.1	125.2	126.7	87.9	122.3	111.3	118.2	104.0	95.8
Ironmongery	100	58.9	108.8	128.7	113.6	127.3	127.3	122.9	87.8	103.1	111.5	143.1	137.4	127.0
Landscaping	100	152.5	223.7	208.2	157.2	161.0	135.6	122.8	78.0	90.1	111.9	222.5	257.0	220.5
Plumbing, Heating & Electrical	100	51.8	84.4	103.1	95.3	115.4	126.0	125.9	96.1	111.3	120.3	137.1	119.2	112.9
Renewables & Water Saving	100	26.7	55.1	69.3	58.2	71.9	67.2	70.3	50.4	62.6	62.3	85.9	78.8	72.7
Kitchens & Bathrooms	100	43.7	87.3	111.1	106.3	117.3	119.3	122.7	87.4	94.4	107.4	120.7	113.5	111.5
Miscellaneous	100	55.1	98.0	112.4	98.2	122.3	120.8	118.9	86.1	109.4	107.1	131.2	126.2	111.2
Services	100	70.2	105.9	119.4	109.2	119.2	117.5	115.4	89.0	93.5	103.3	134.5	128.8	123.5

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

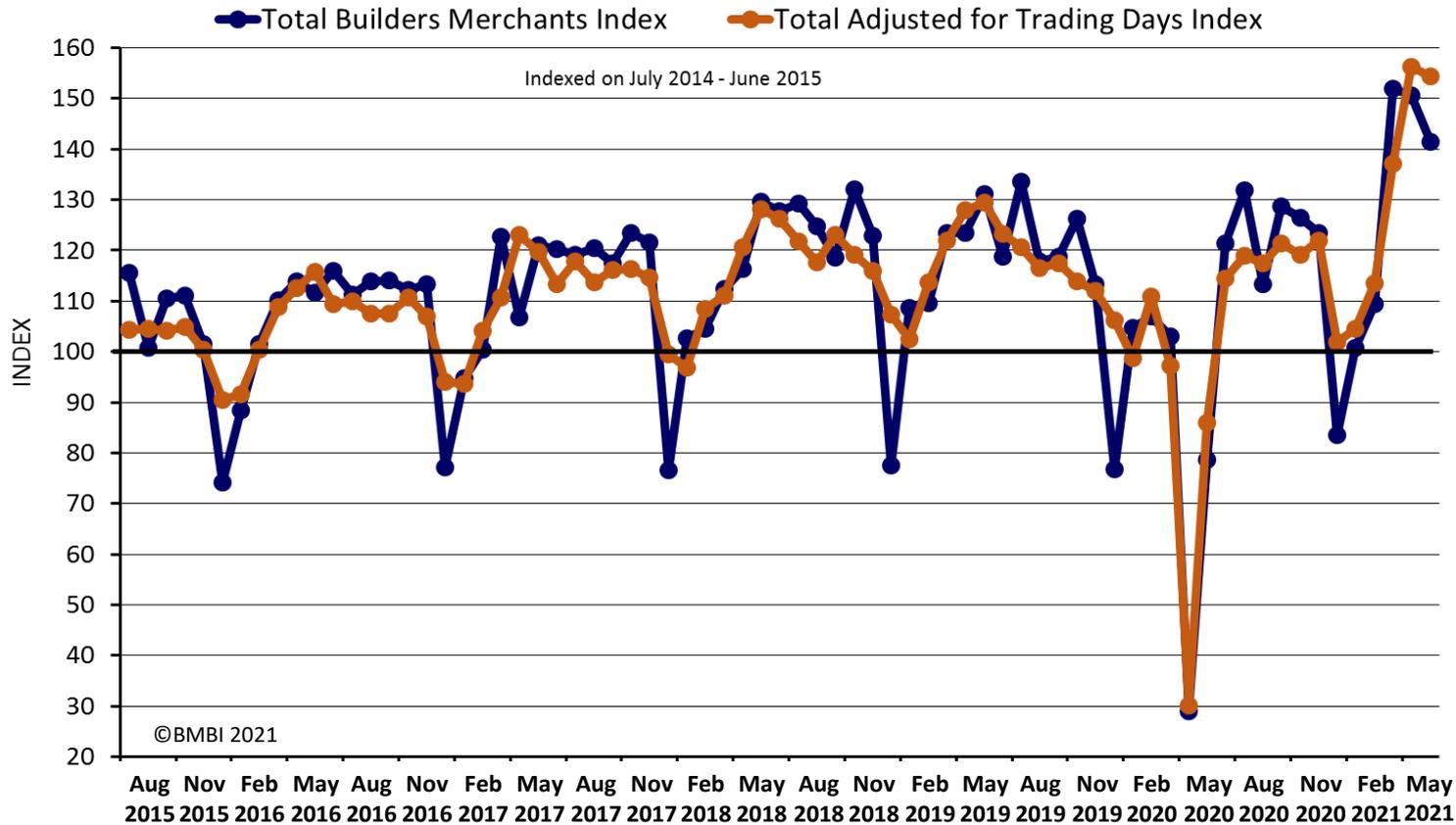
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: Index

Adjusted and unadjusted for trading days



Total Builders Merchants Index v Total Adjusted for Trading Days Index



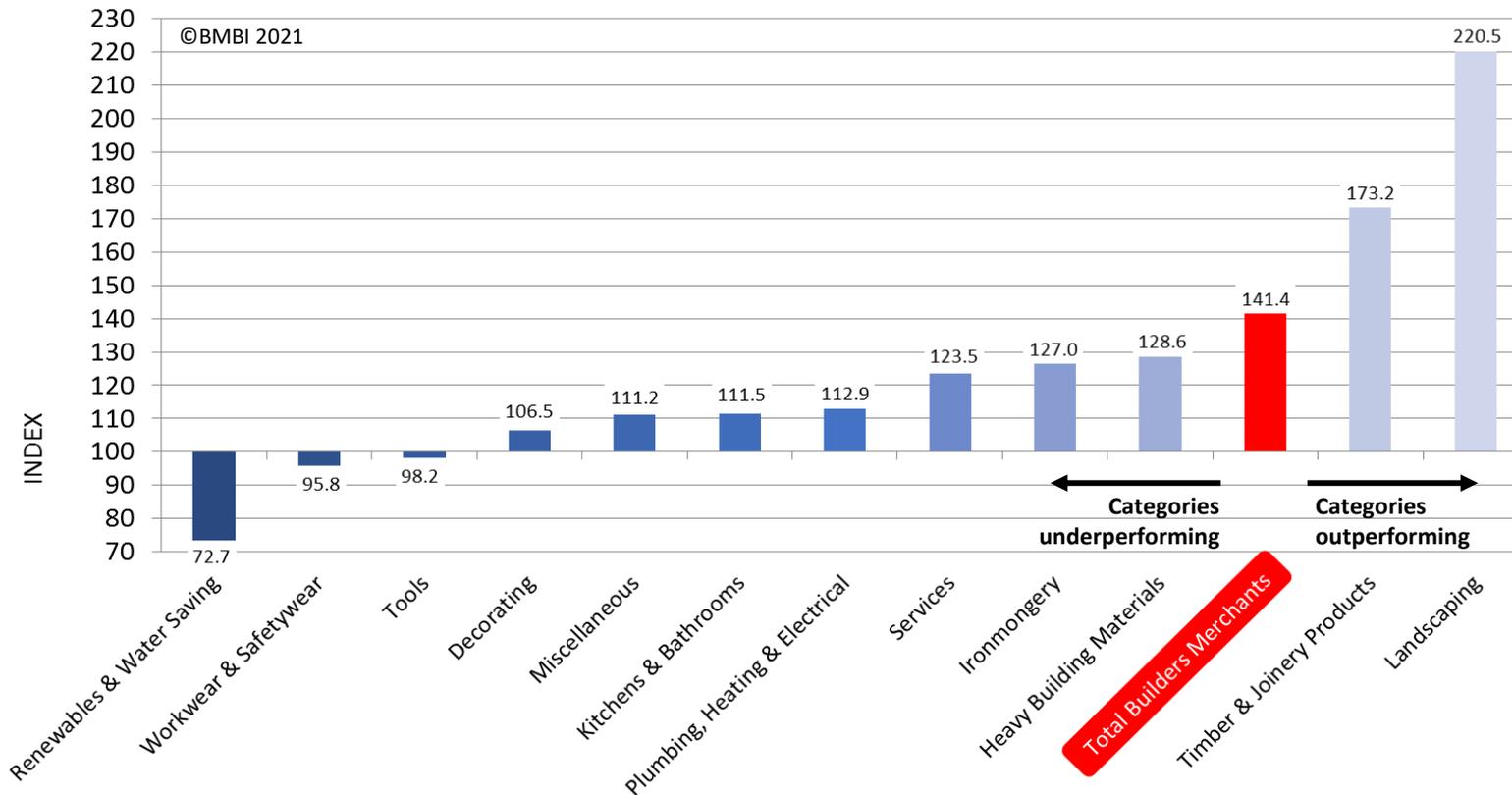
Source: GfK's Builders Merchants Total Category Report July 2015 to May 2021

Monthly: Index and Categories

May 2021 index



May 2021 Index



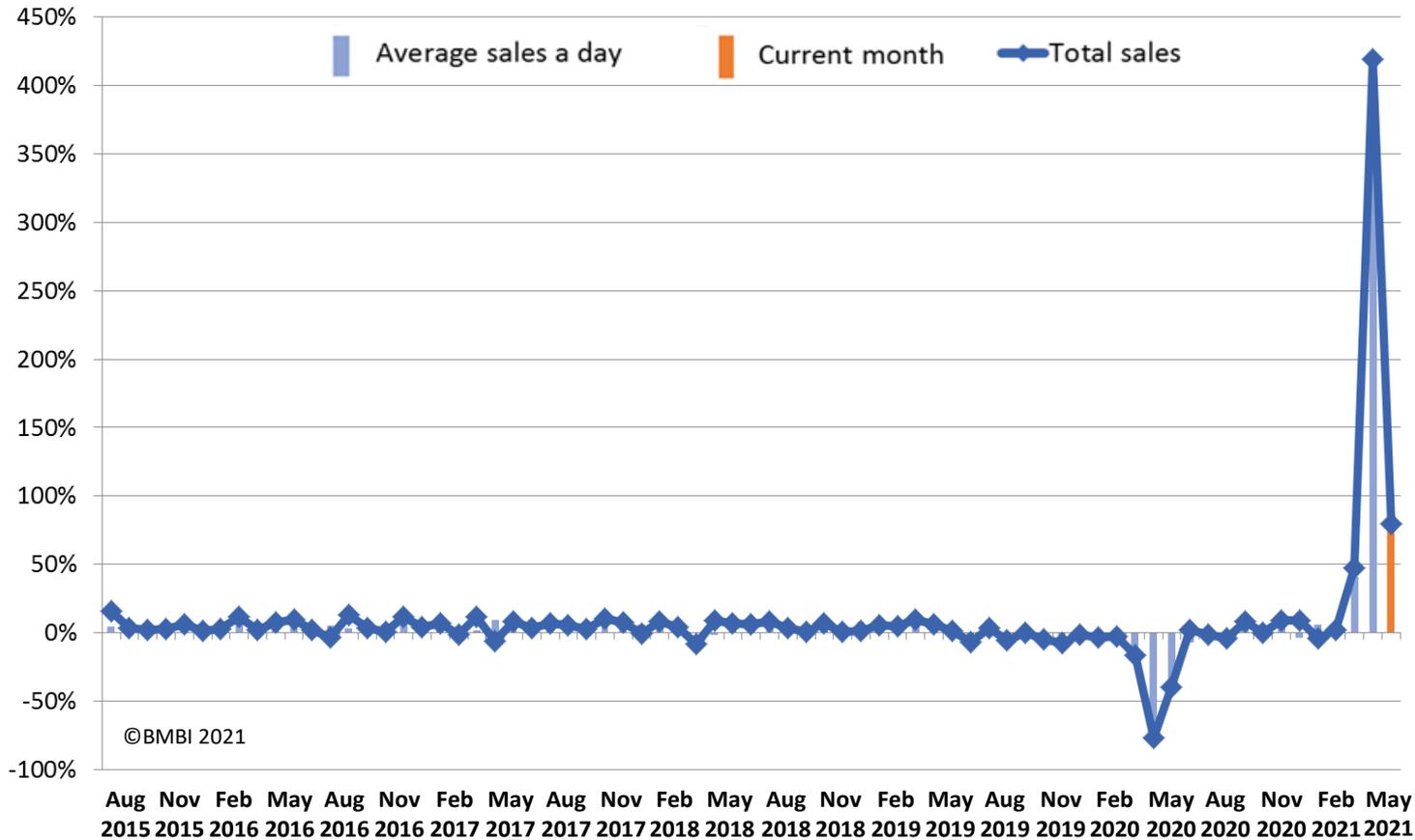
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



Monthly: Year on Year



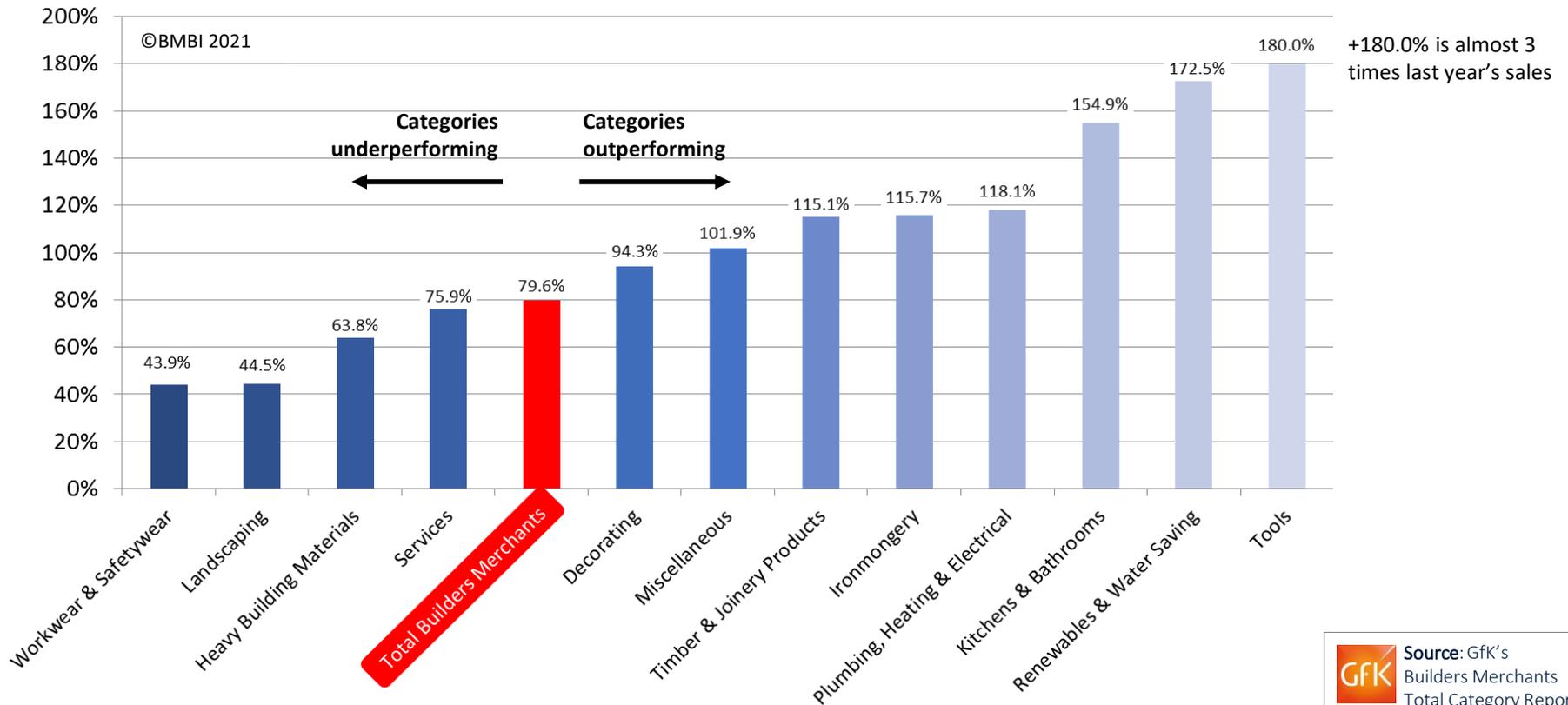
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: This Year v Last Year

May 2021 sales indices



May 2021 index v May 2020 index

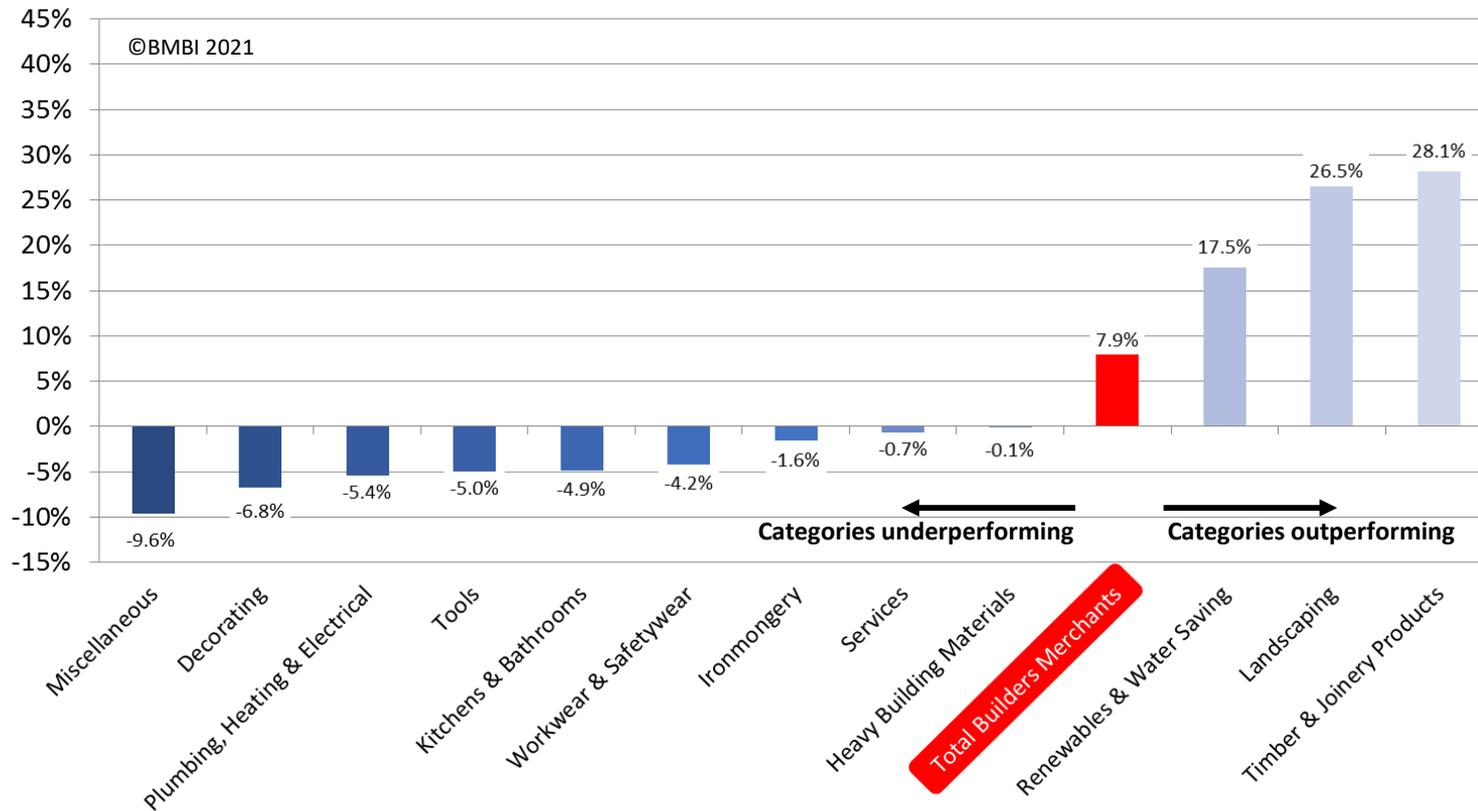


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: This year v 2019

May 2021 2-year sales indices

2-year comparison: May 2021 v May 2019

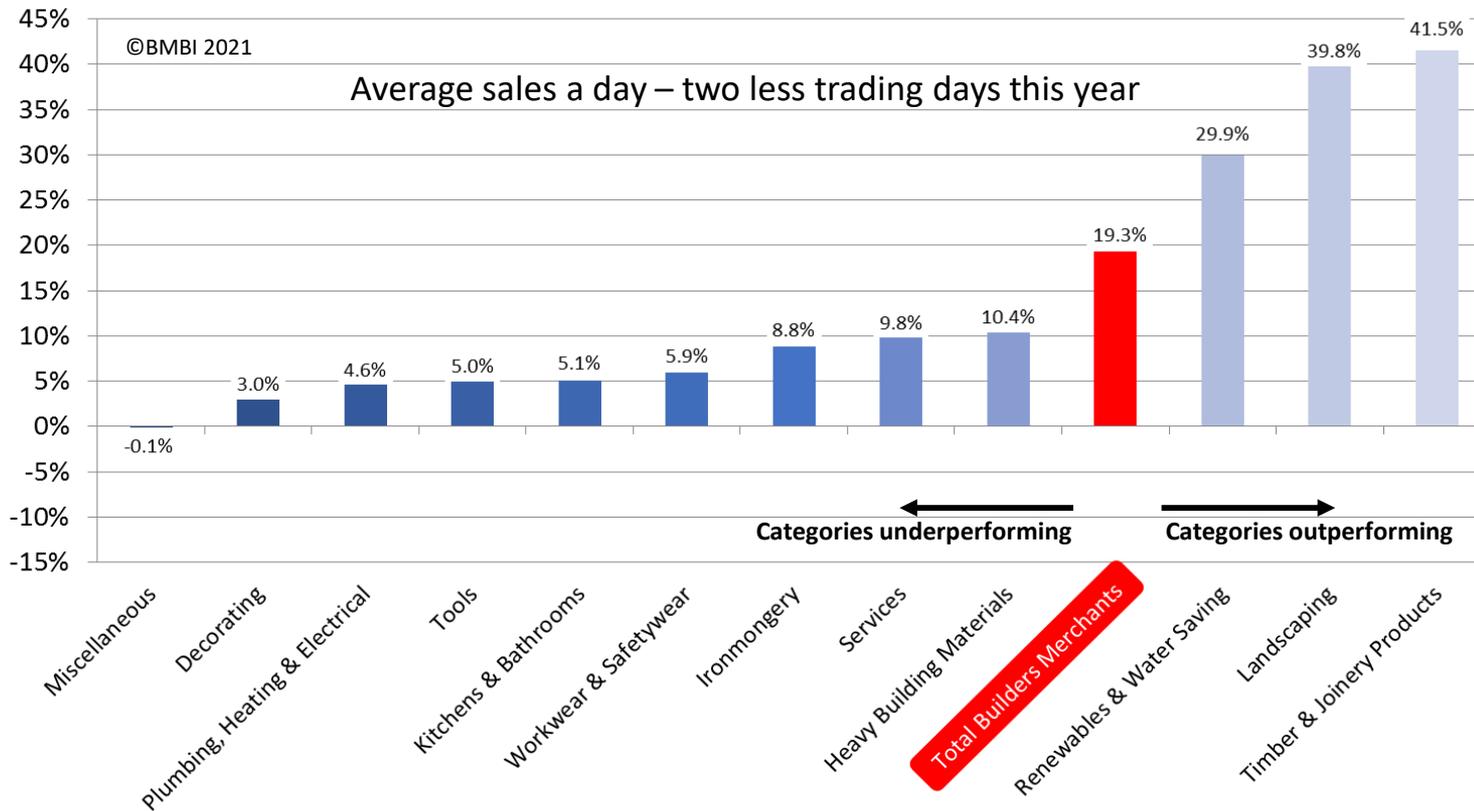


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: This year v 2019

May 2021 2-year average sales a day indices

2-year comparison: May 2021 v May 2019



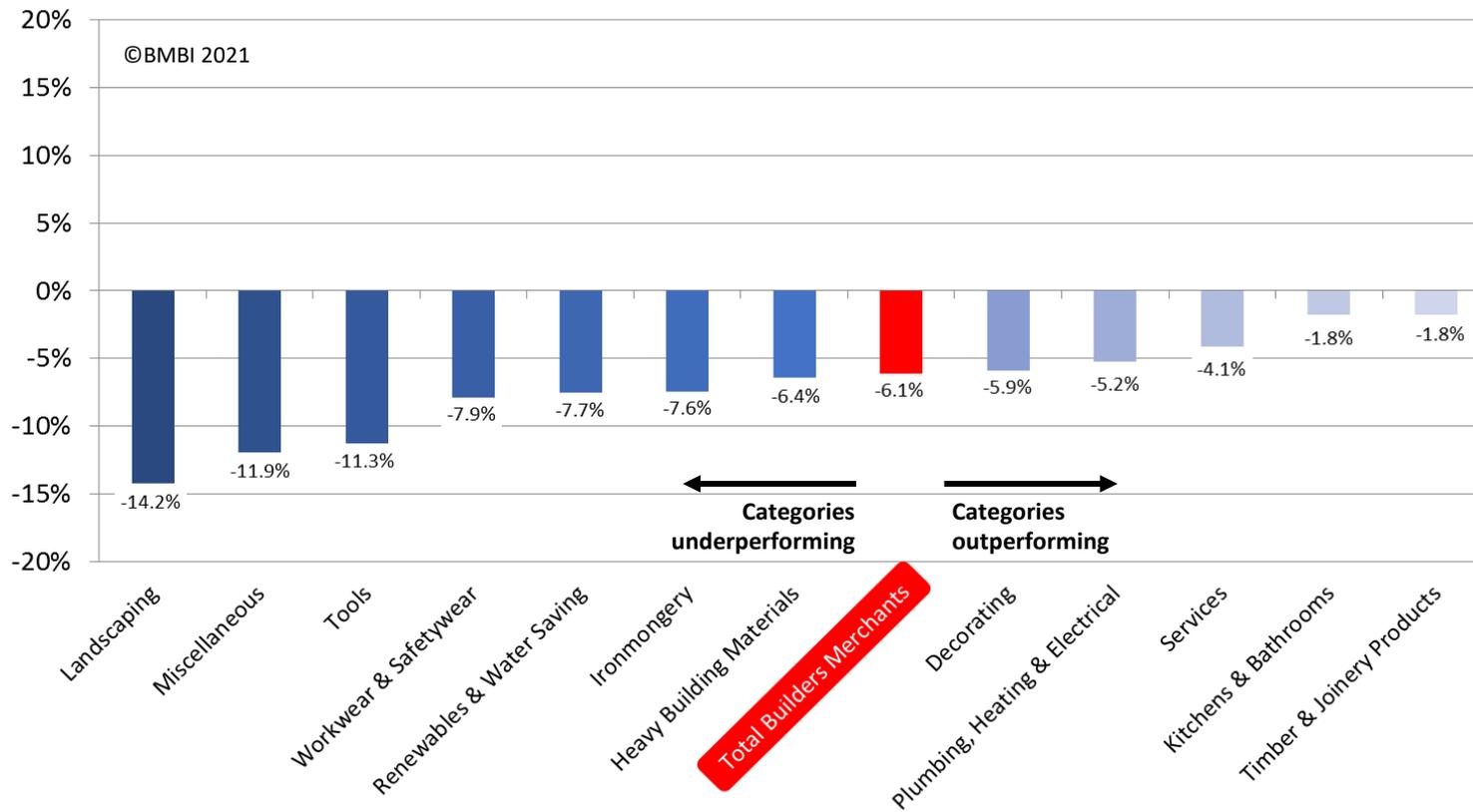
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: This Month v Last Month

May 2021 sales indices



May 2021 Index v April 2021 Index



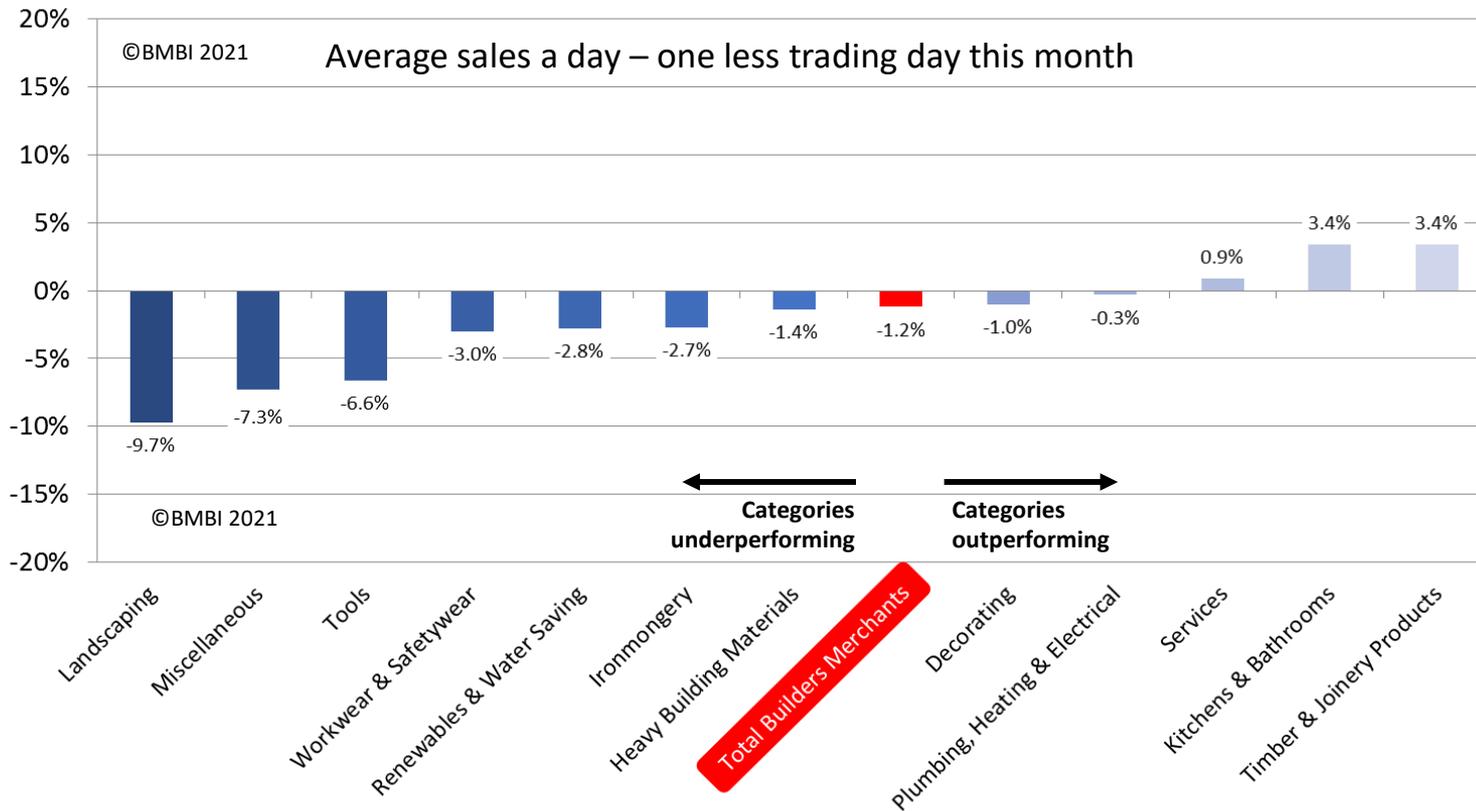
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: This Month v Last Month

May 2021 average sales a day indices



May 2021 Index v April 2021 Index



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

Quarterly: Index and Categories

Quarter 1 2020* to Quarter 1 2021

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021
Total Builders Merchants	100	104.9	76.4	124.6	111.1	120.7
Timber & Joinery Products	100	108.5	78.0	133.4	125.4	141.5
Heavy Building Materials	100	102.5	75.1	119.9	106.8	113.1
Decorating	100	101.1	56.3	108.5	99.5	101.1
Tools	100	86.0	41.0	94.4	90.7	99.6
Workwear & Safetywear	100	128.7	67.5	113.7	113.3	117.3
Ironmongery	100	112.9	65.0	123.2	112.6	119.3
Landscaping	100	100.1	138.8	175.5	112.1	141.5
Plumbing, Heating & Electrical	100	118.5	53.9	104.6	116.0	122.9
Renewables & Water Saving	100	76.6	31.5	66.4	62.6	70.3
Kitchens & Bathrooms	100	109.4	48.4	111.6	109.8	107.5
Miscellaneous	100	129.1	63.3	111.0	108.6	115.9
Services	100	104.8	72.8	115.9	107.3	110.4

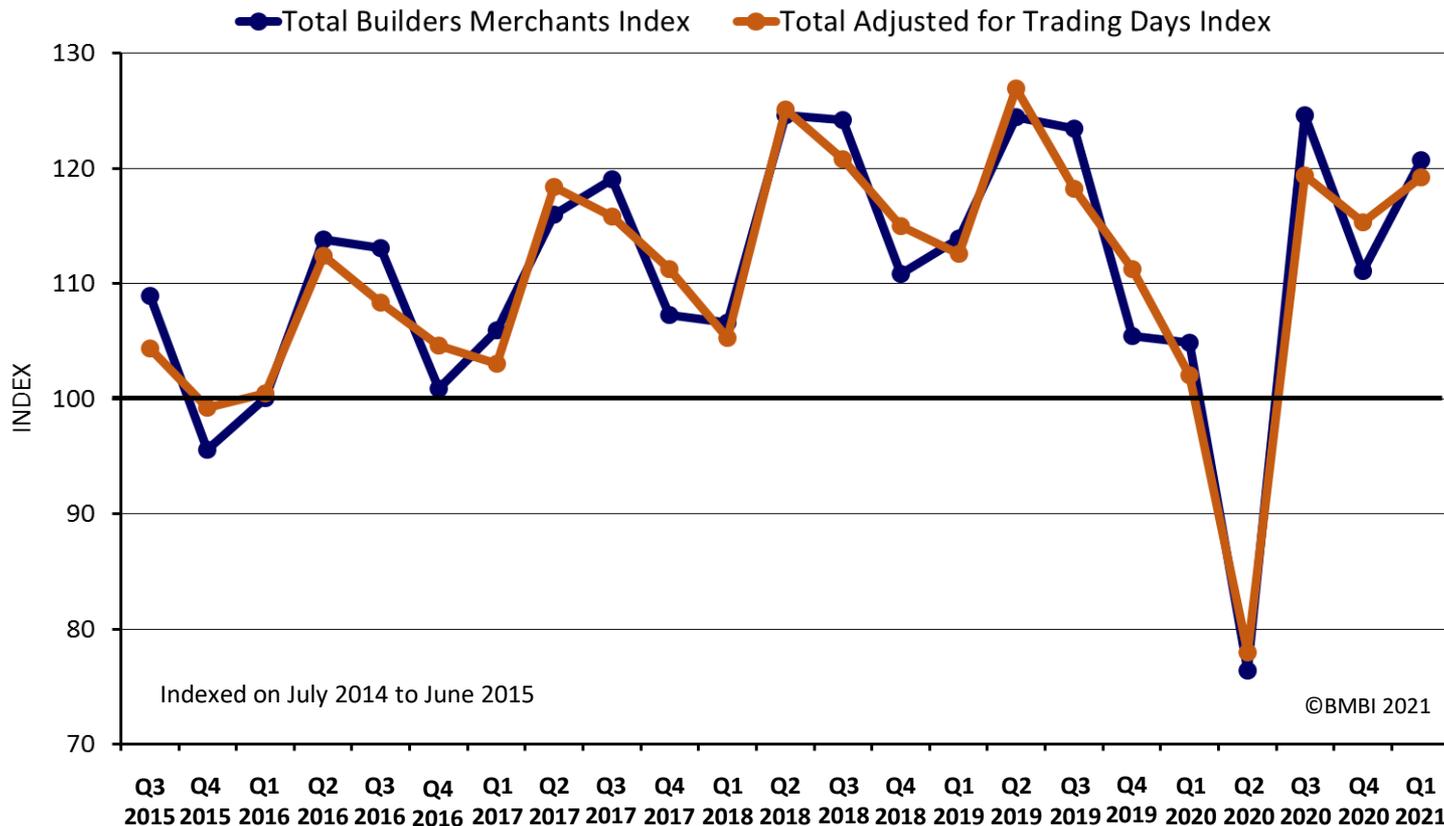
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.


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

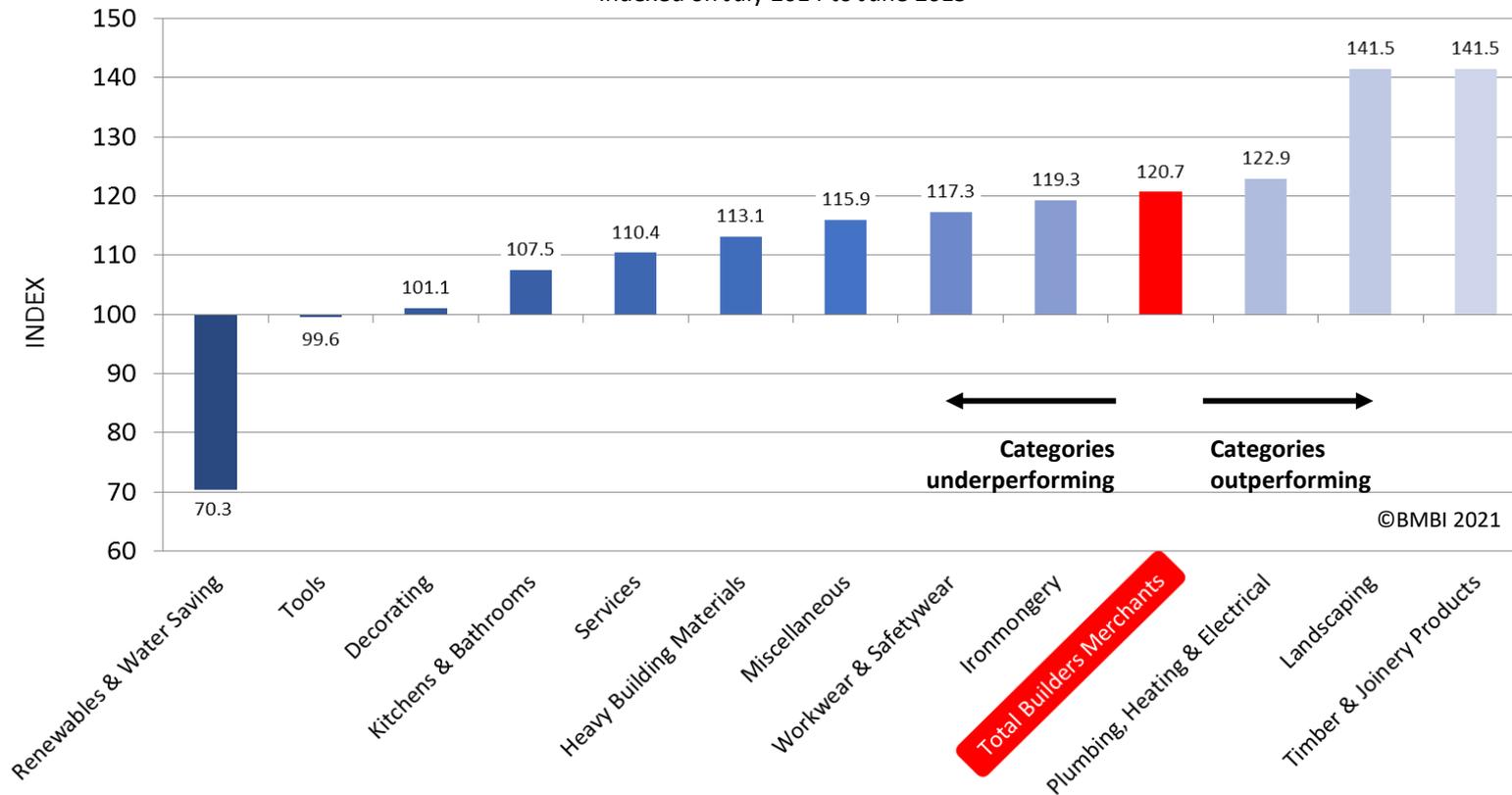
Quarterly: Index and Categories

Q1 2021 index



Quarter 1 2021

Indexed on July 2014 to June 2015



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

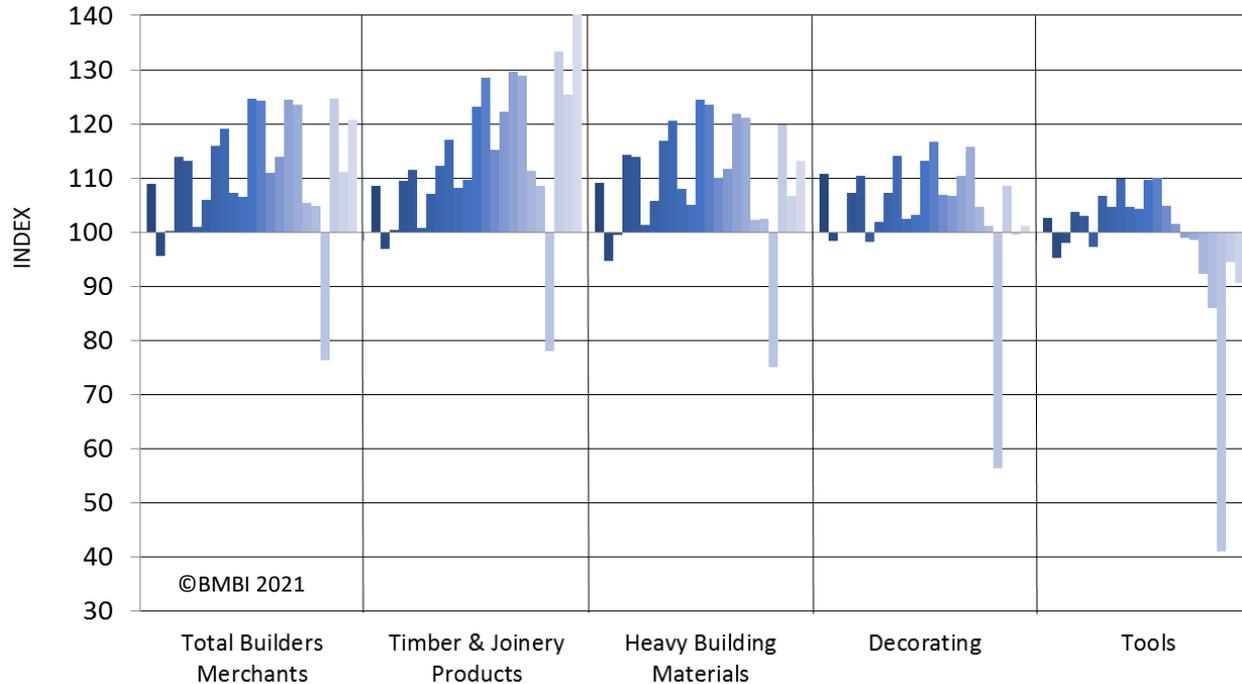
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 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



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

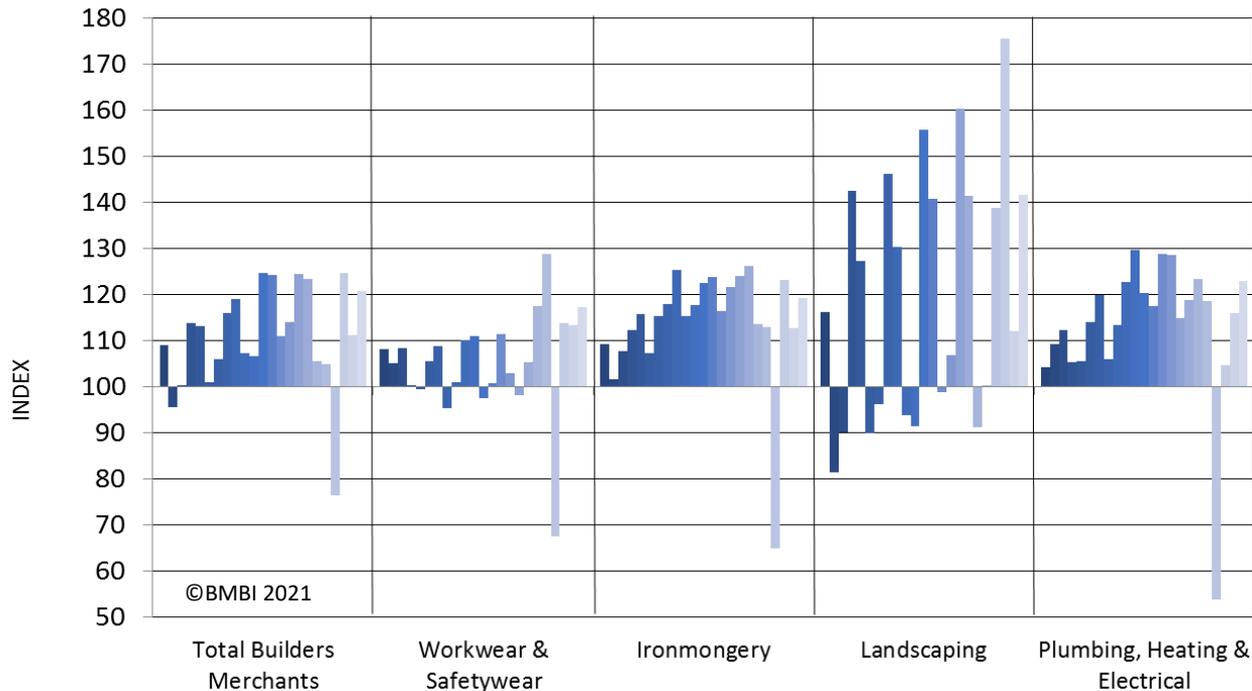
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 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



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

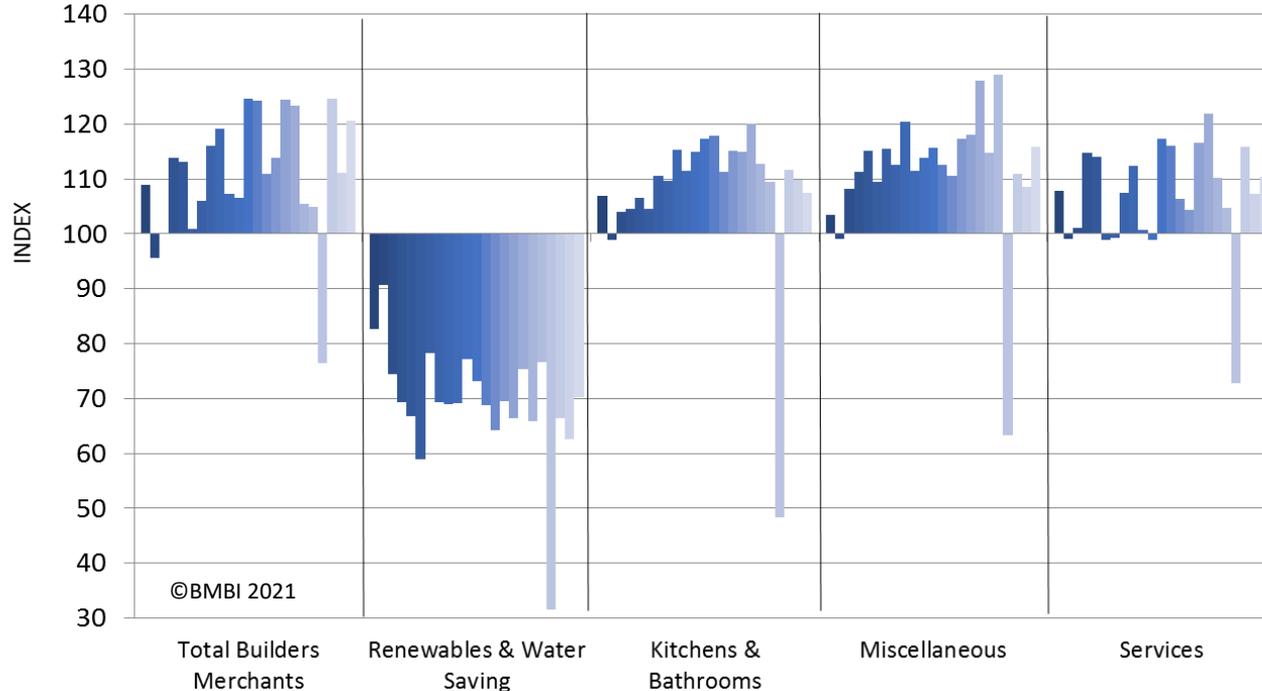
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 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
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- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020
- Q1 2021

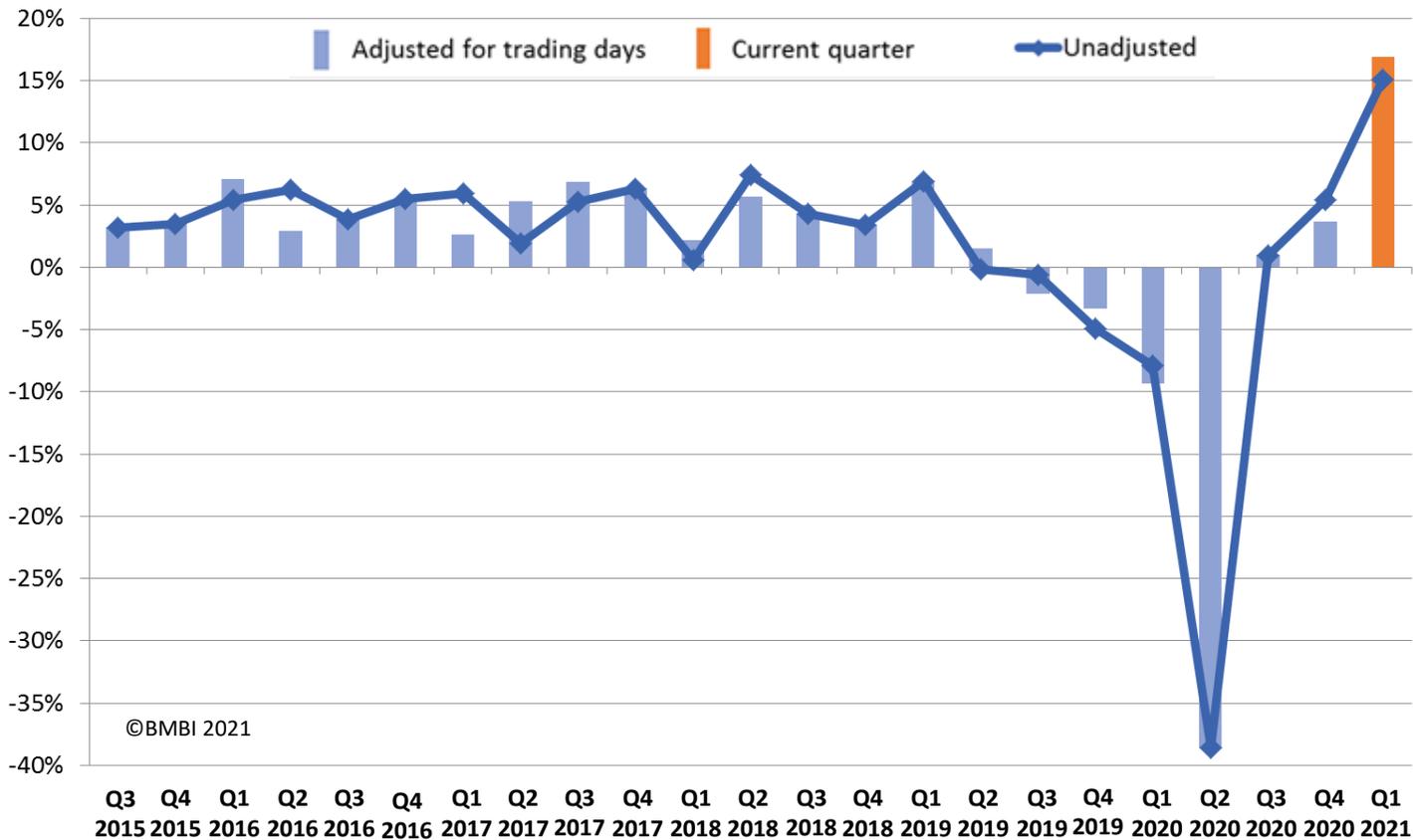


Source: GfK's Builders Merchants Total Category Report July 2015 to March 2021

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year



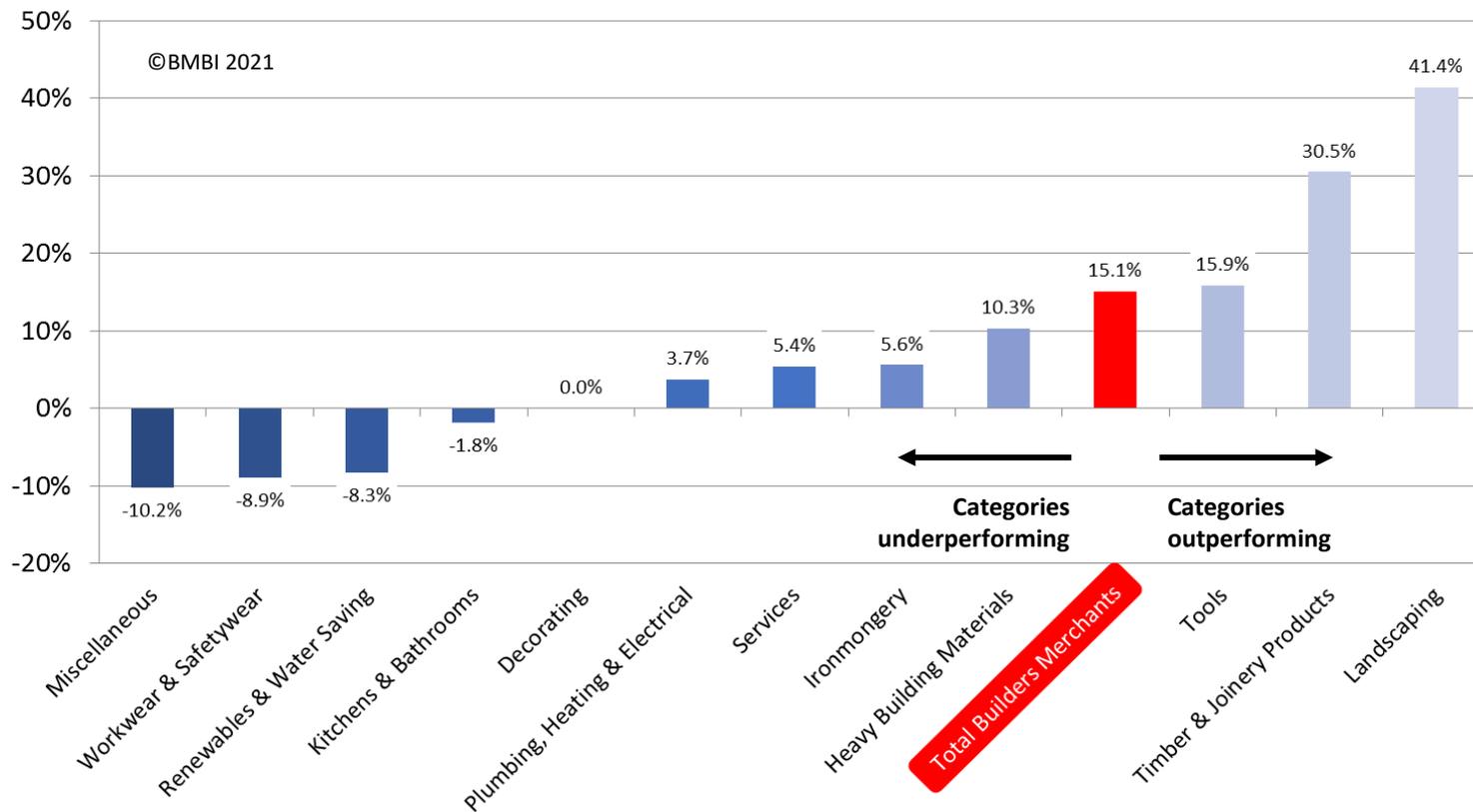
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: This Year v Last Year

Q1 2021 sales indices



Quarter 1 2021 index v Quarter 1 2020 index



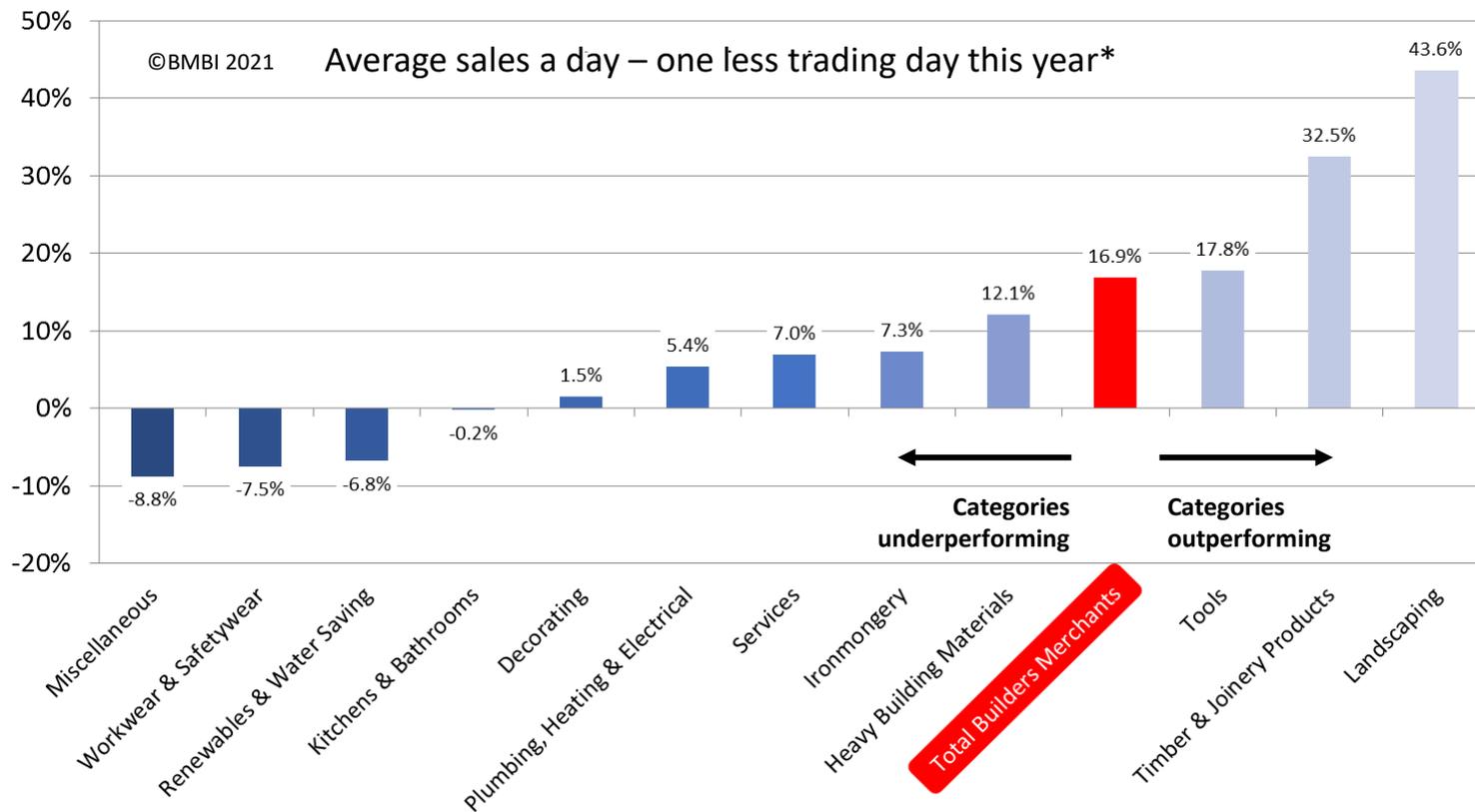
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: This Year v Last Year

Q1 2021 average sales a day indices



Quarter 1 2021 index v Quarter 1 2020 index



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

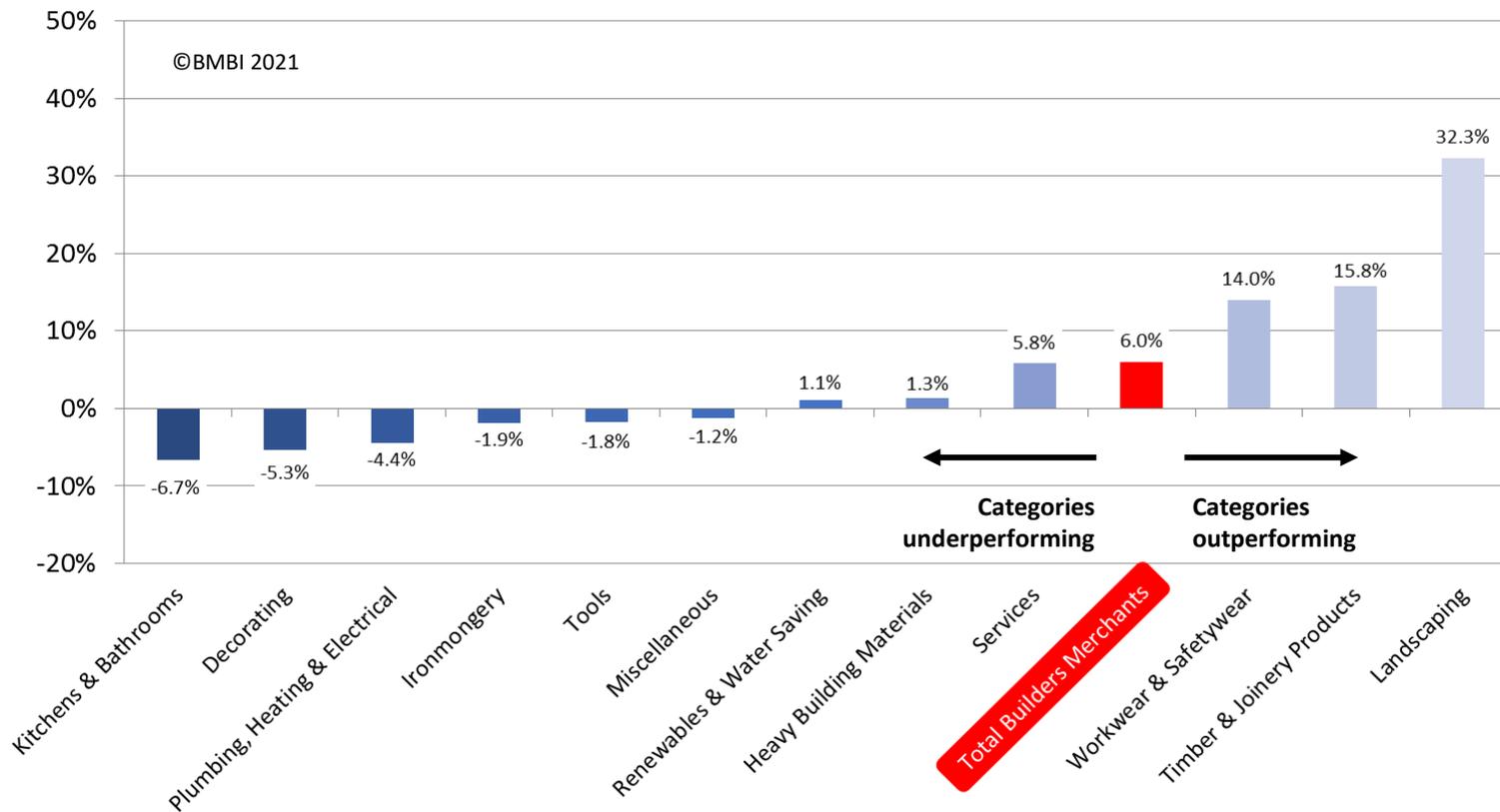
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Quarterly: This Year v Q1 2019

Q1 2021 2-year sales indices



2-year comparison: Quarter 1 2021 v Quarter 1 2019



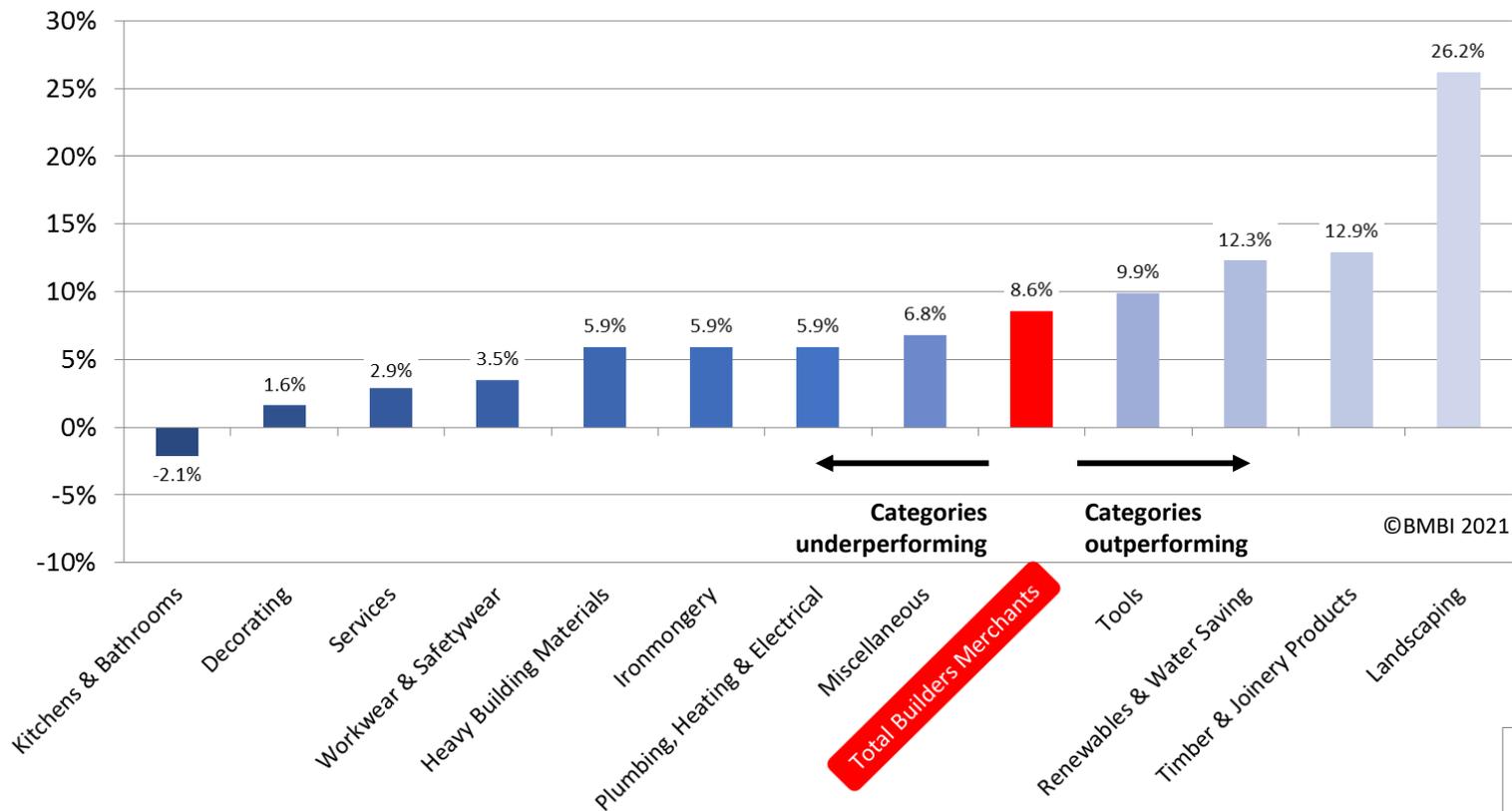
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: Quarter on Quarter

Q1 2021 sales indices



Quarter 1 2021 index v Quarter 4 2020 index



©BMBI 2021

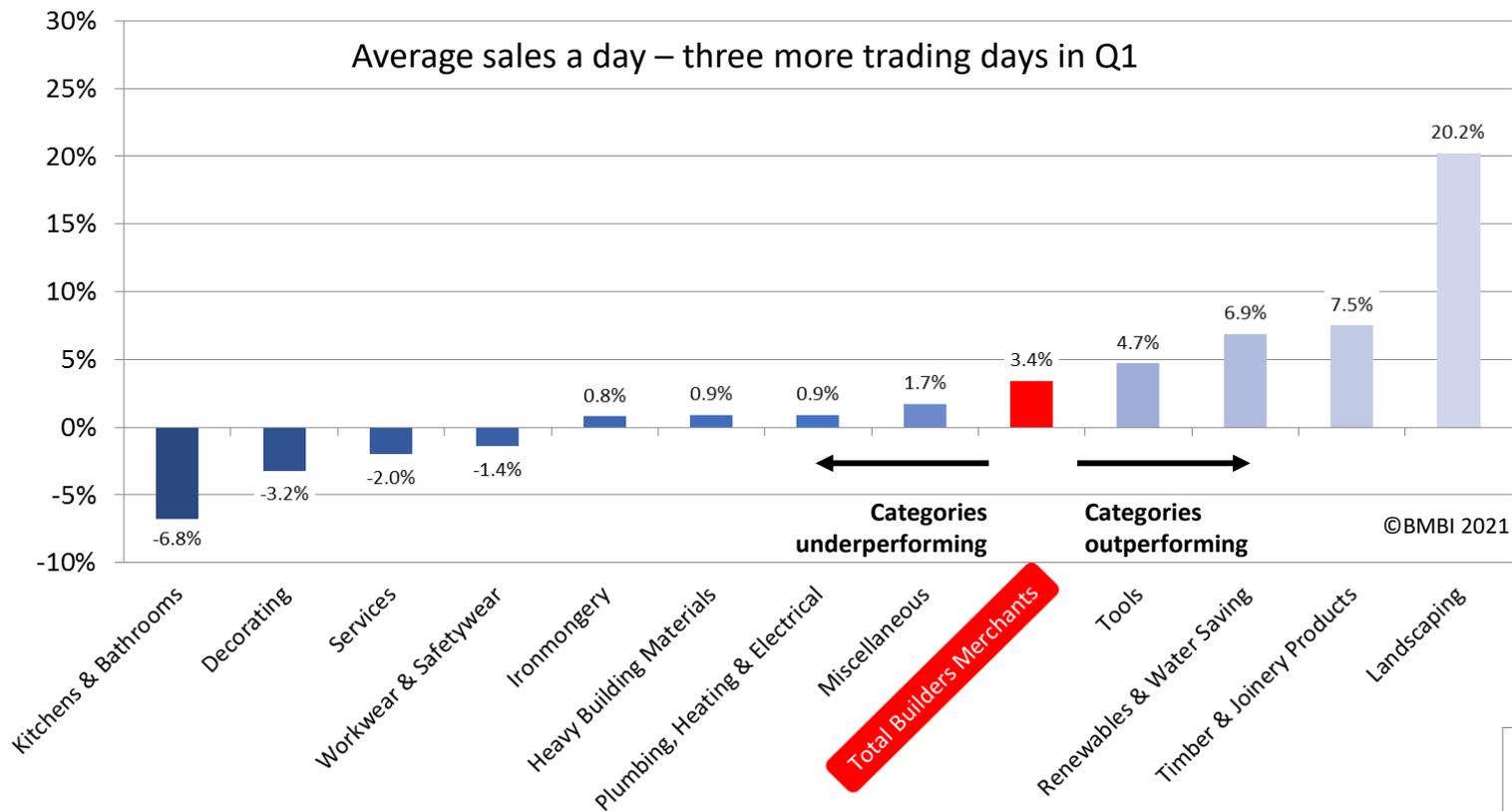
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: Quarter on Quarter

Q1 2021 average sales a day indices



Quarter 1 2021 index v Quarter 4 2020 index

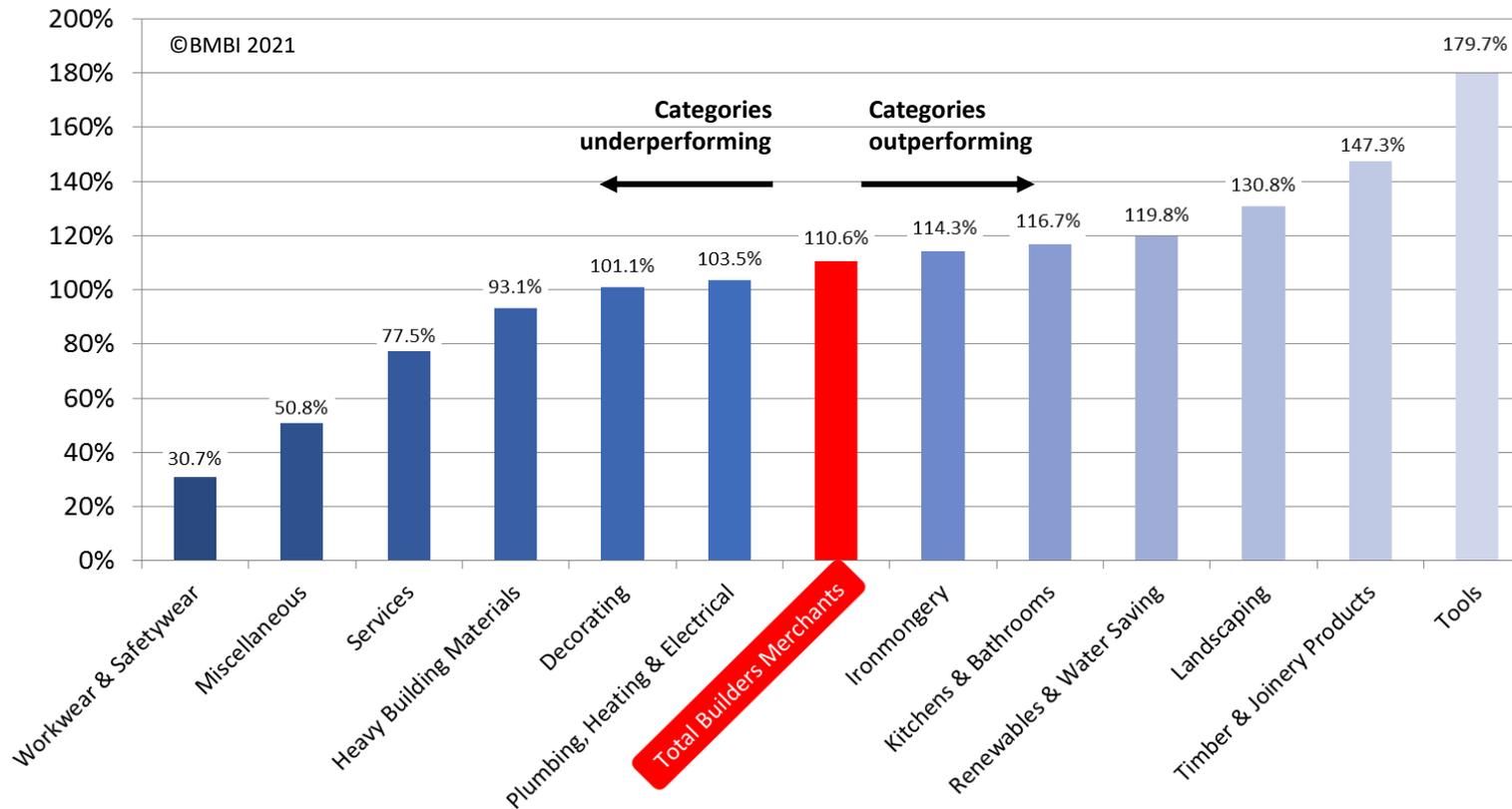


Source: GfK's Builders Merchants Total Category Report July 2015 to March 2021

Latest 3 months: v last year

March to May sales indices

3 months Mar 21 to May 21 v 3 months Mar 20 to May 20

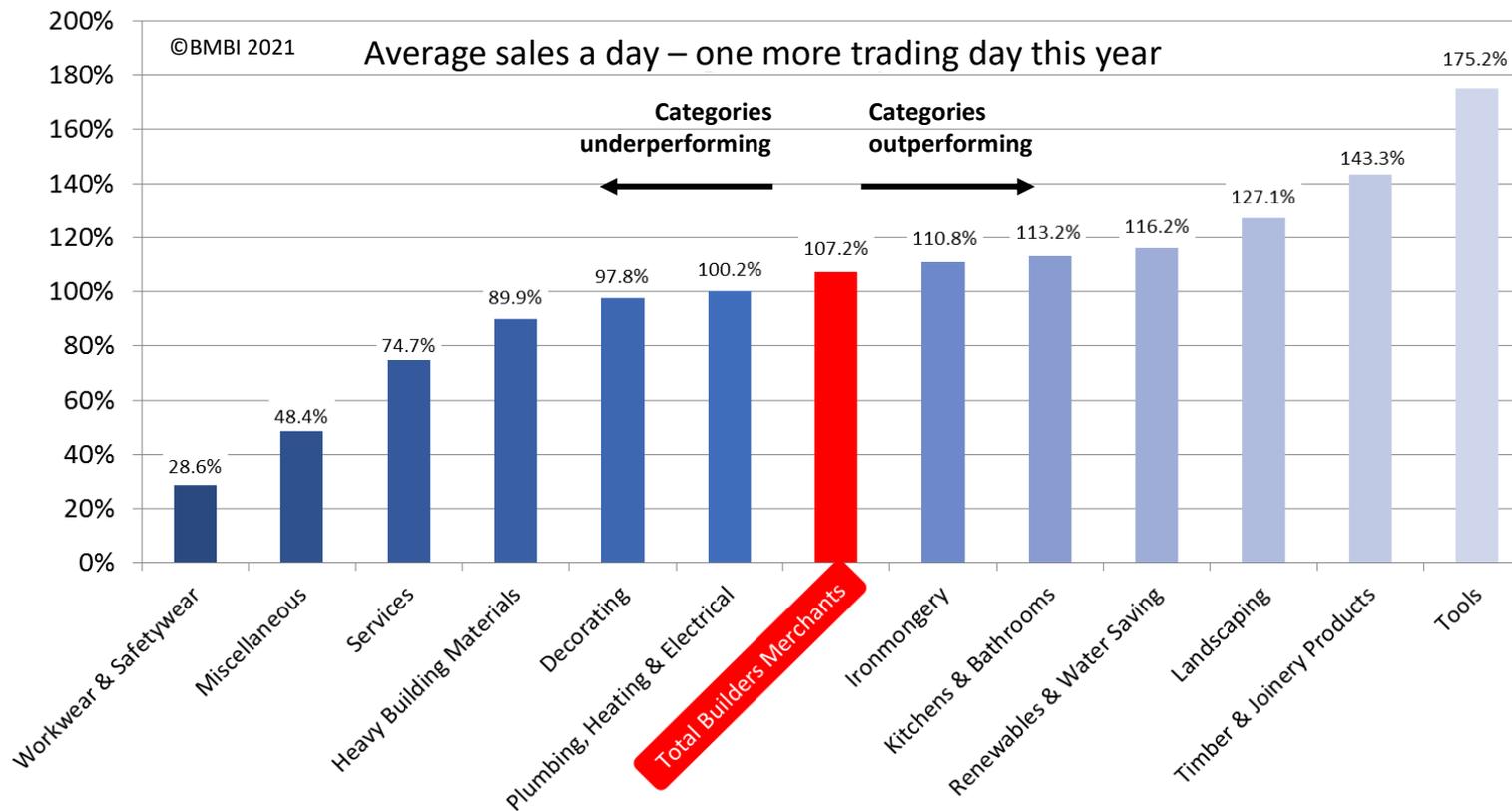


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Latest 3 months: v last year

March to May average sales a day indices

3 months Mar 21 to May 21 v 3 months Mar 20 to May 20

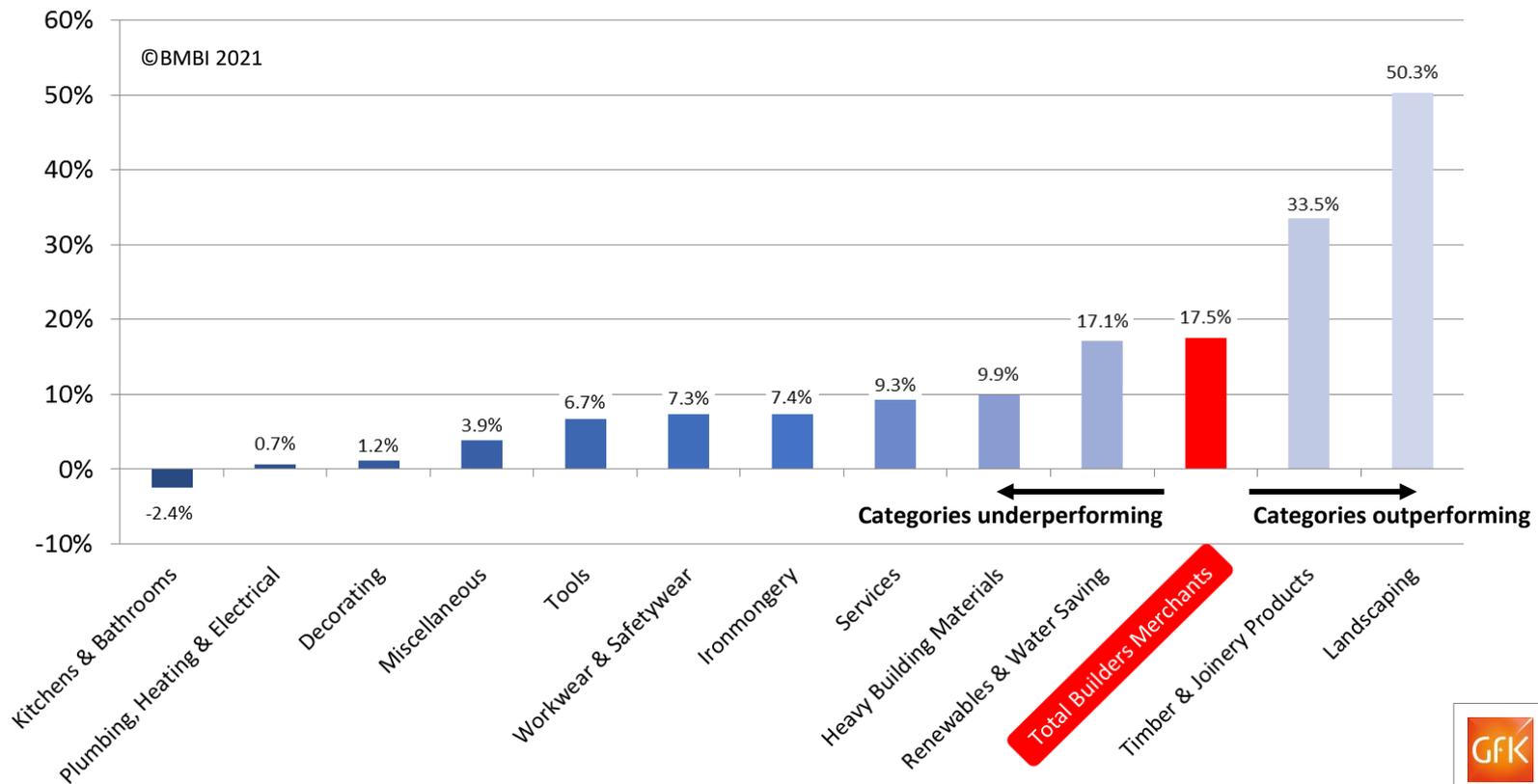


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Latest 3 months: v 2019

March to May 2-year sales indices

2-year comparison: Mar 21 to May 21 v Mar 19 to May 19



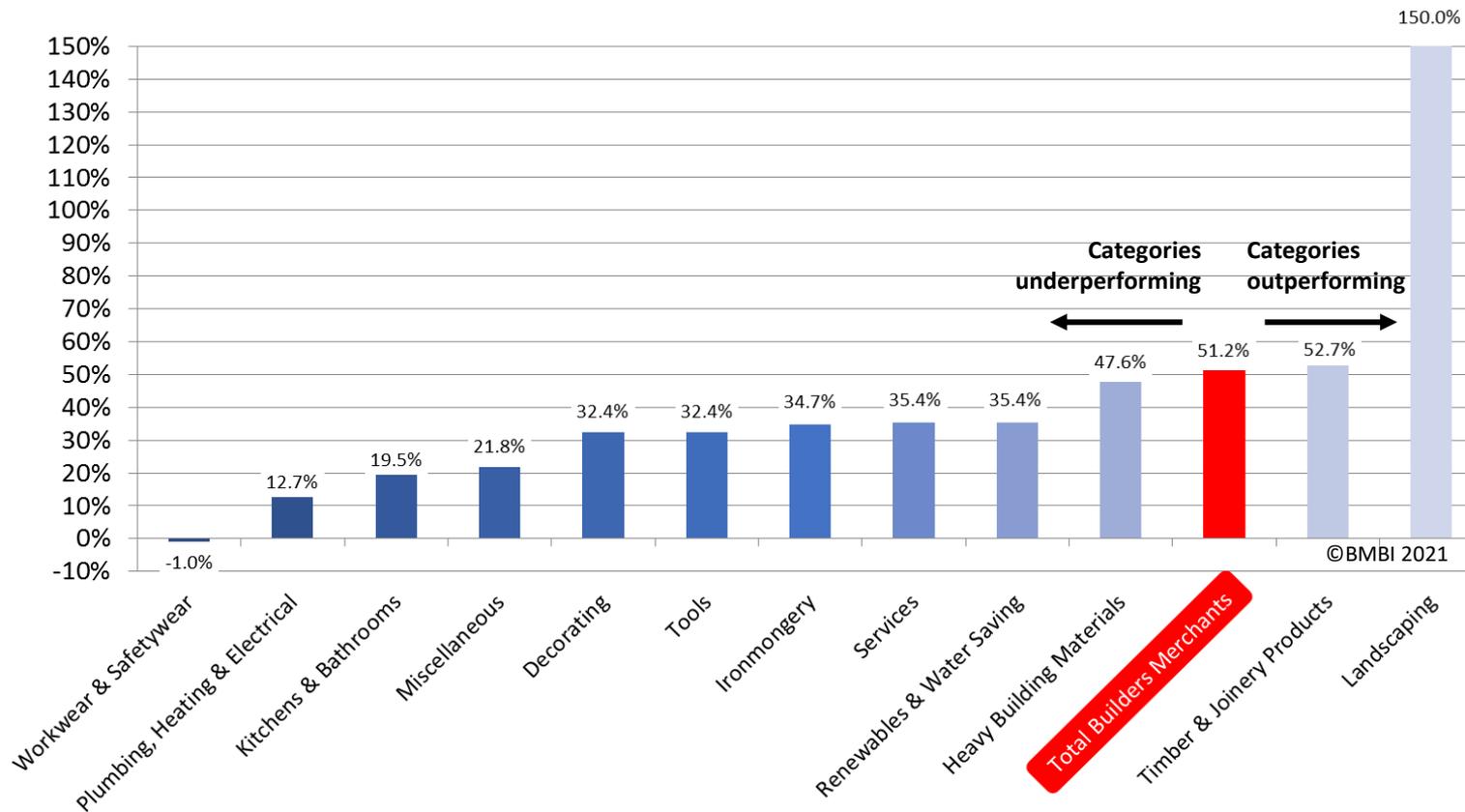
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Latest 3 months: v previous 3 months

March to May sales indices



3 months Mar 21 to May 21 v 3 months Dec 20 to Feb 21



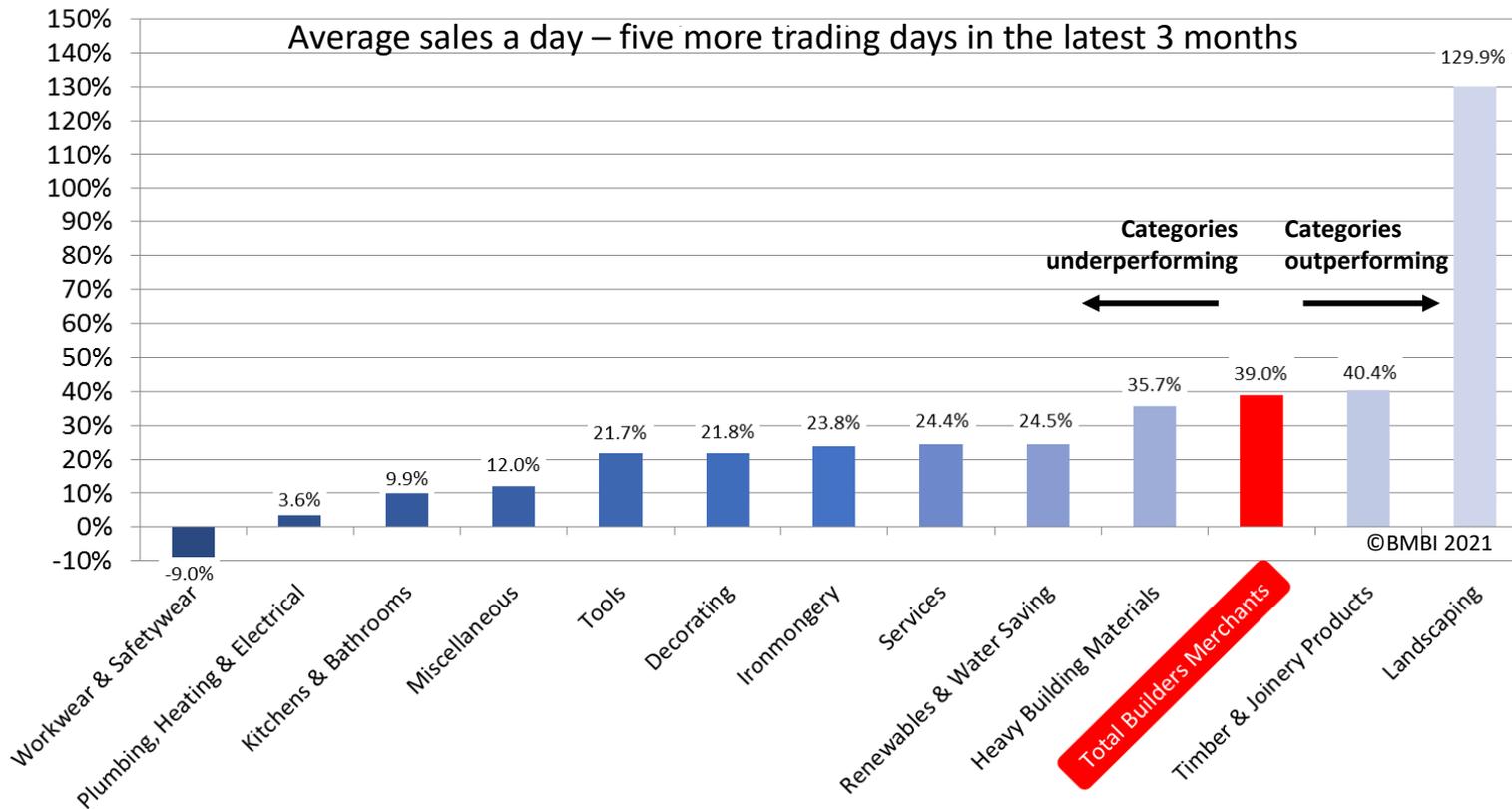
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Latest 3 months: v previous 3 months

March to May average sales a day indices



3 months Mar 21 to May 21 v 3 months Dec 20 to Feb 21

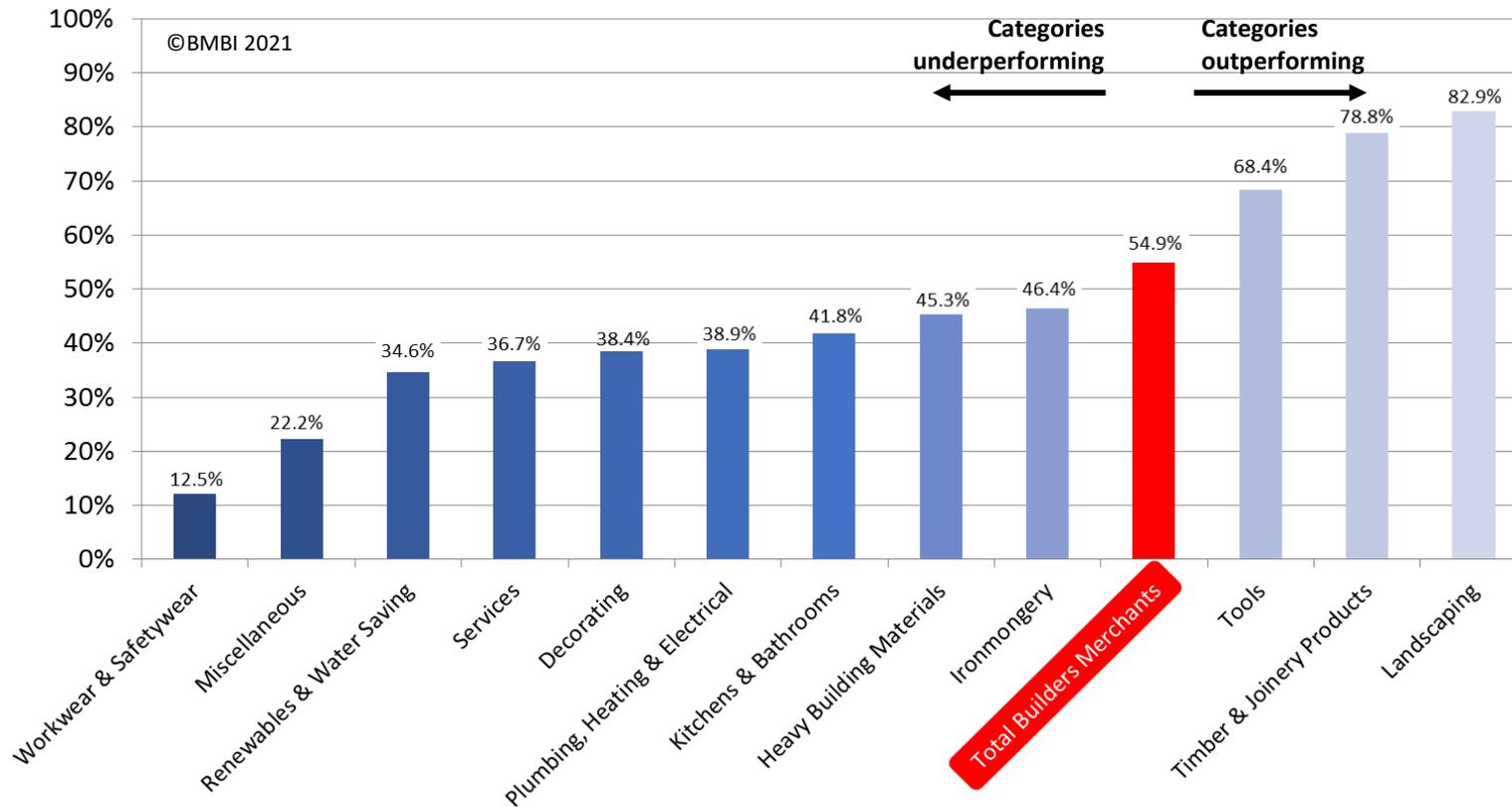


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Year to date: Year on Year

Last 5 months sales indices

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



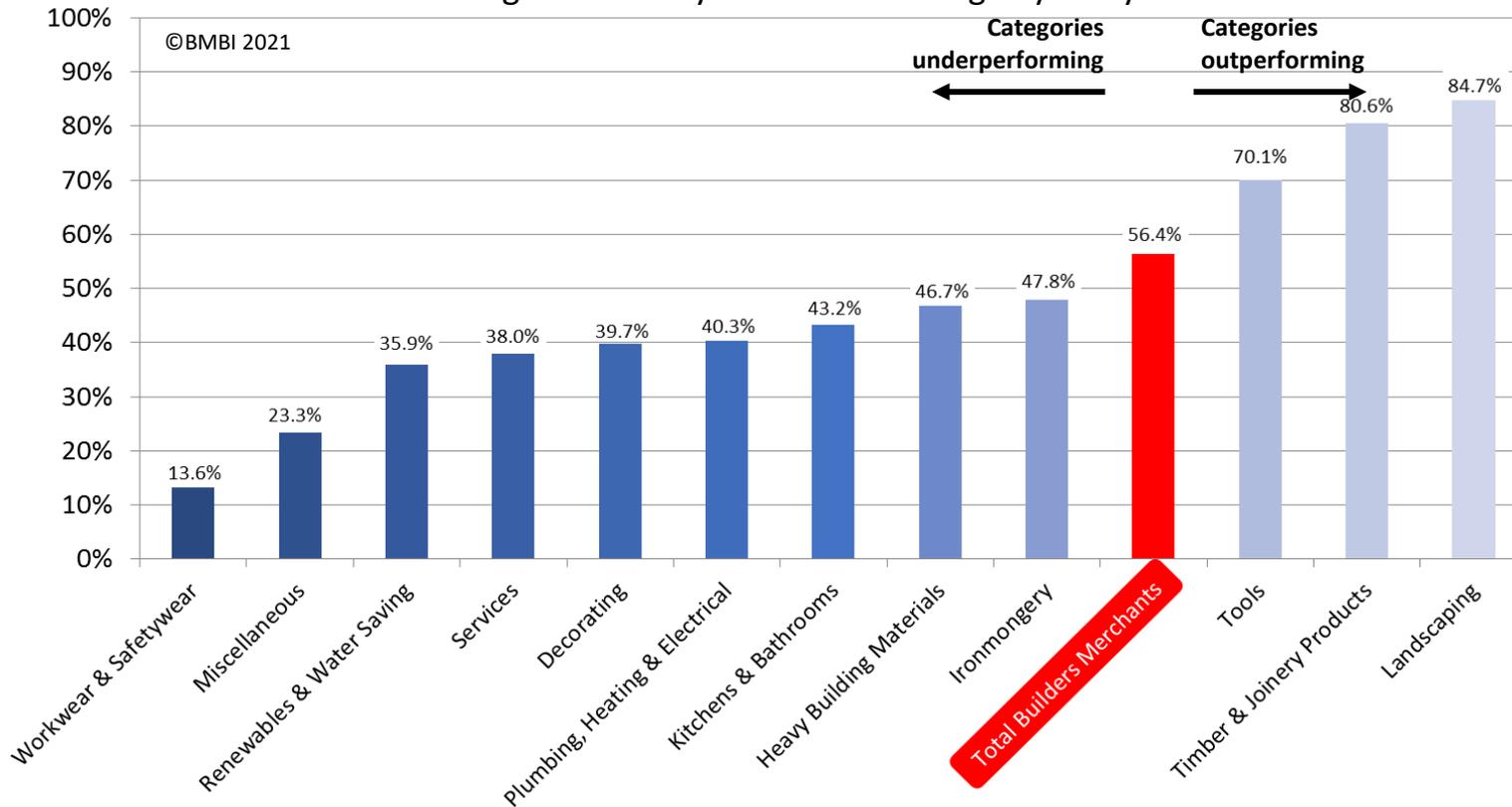
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Year to date: Year on Year

Last 5 months average sales a day indices

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

Average sales a day – one less trading day this year

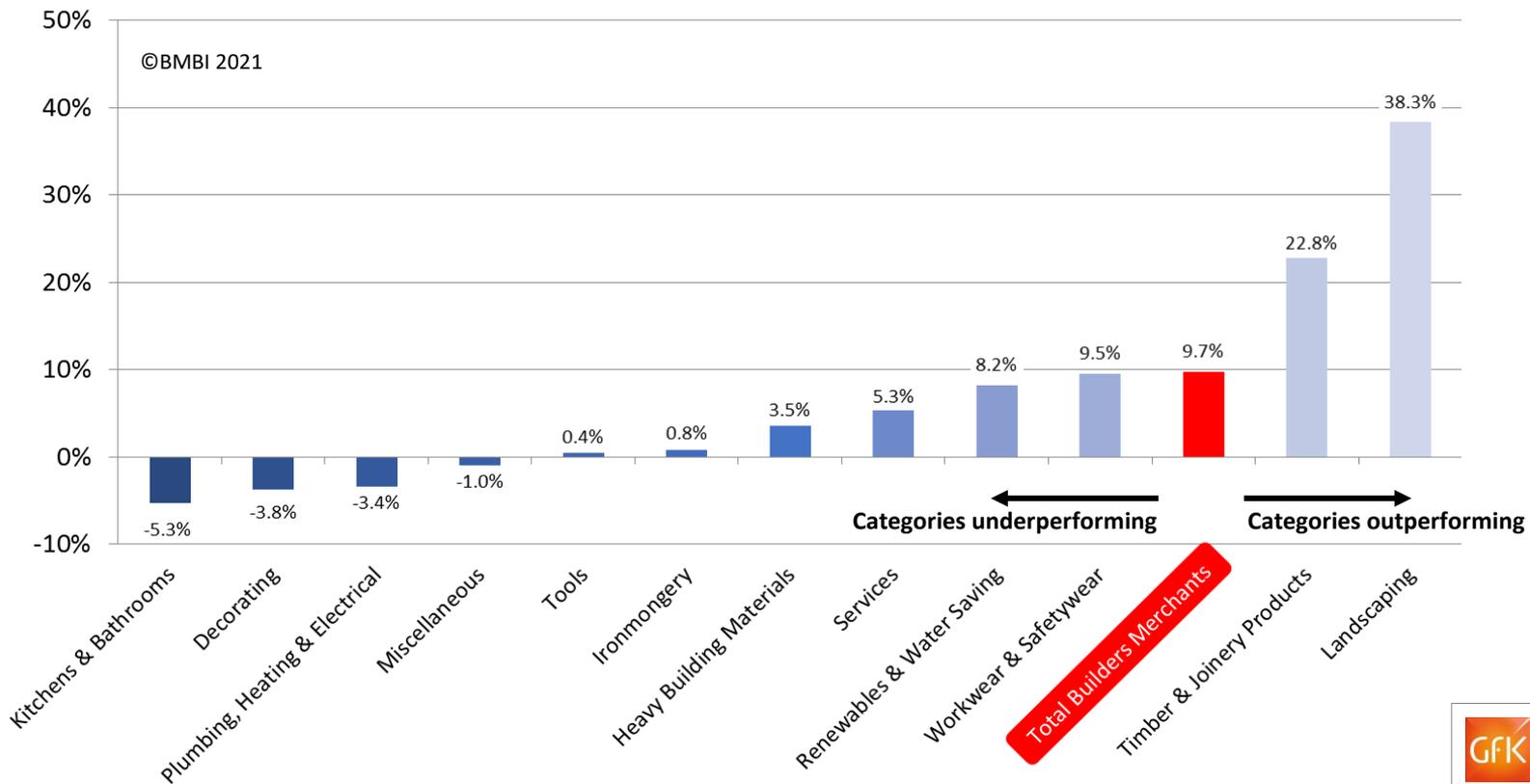


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Year to date: v 2019

Last 5 months 2-year sales indices

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



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

Year to date: v 2019

Last 5 months 2-year average sales a day indices

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

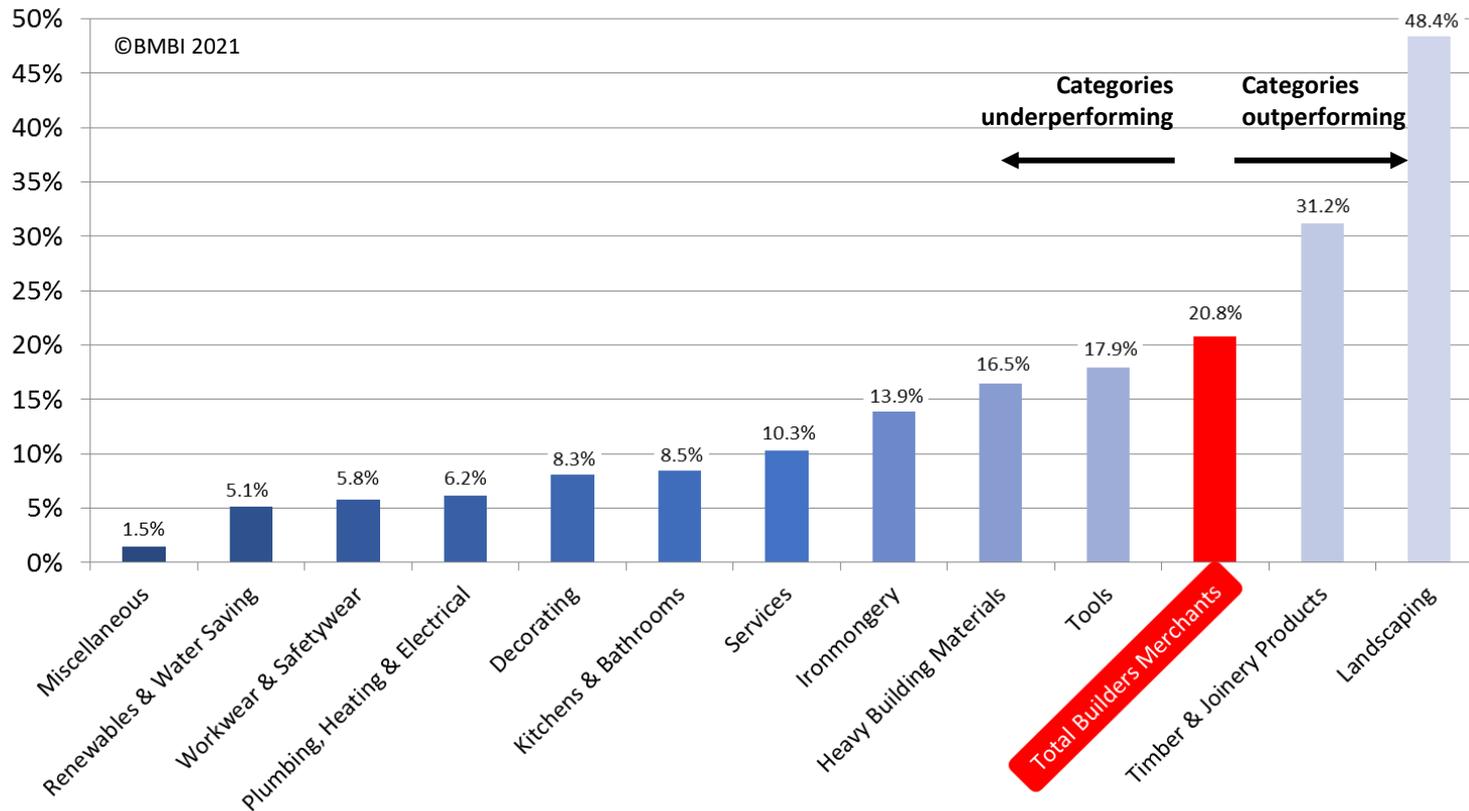


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Last 12 months: Year on Year

MAT

12 months Jun 20 to May 21 v 12 months Jun 19 to May 20

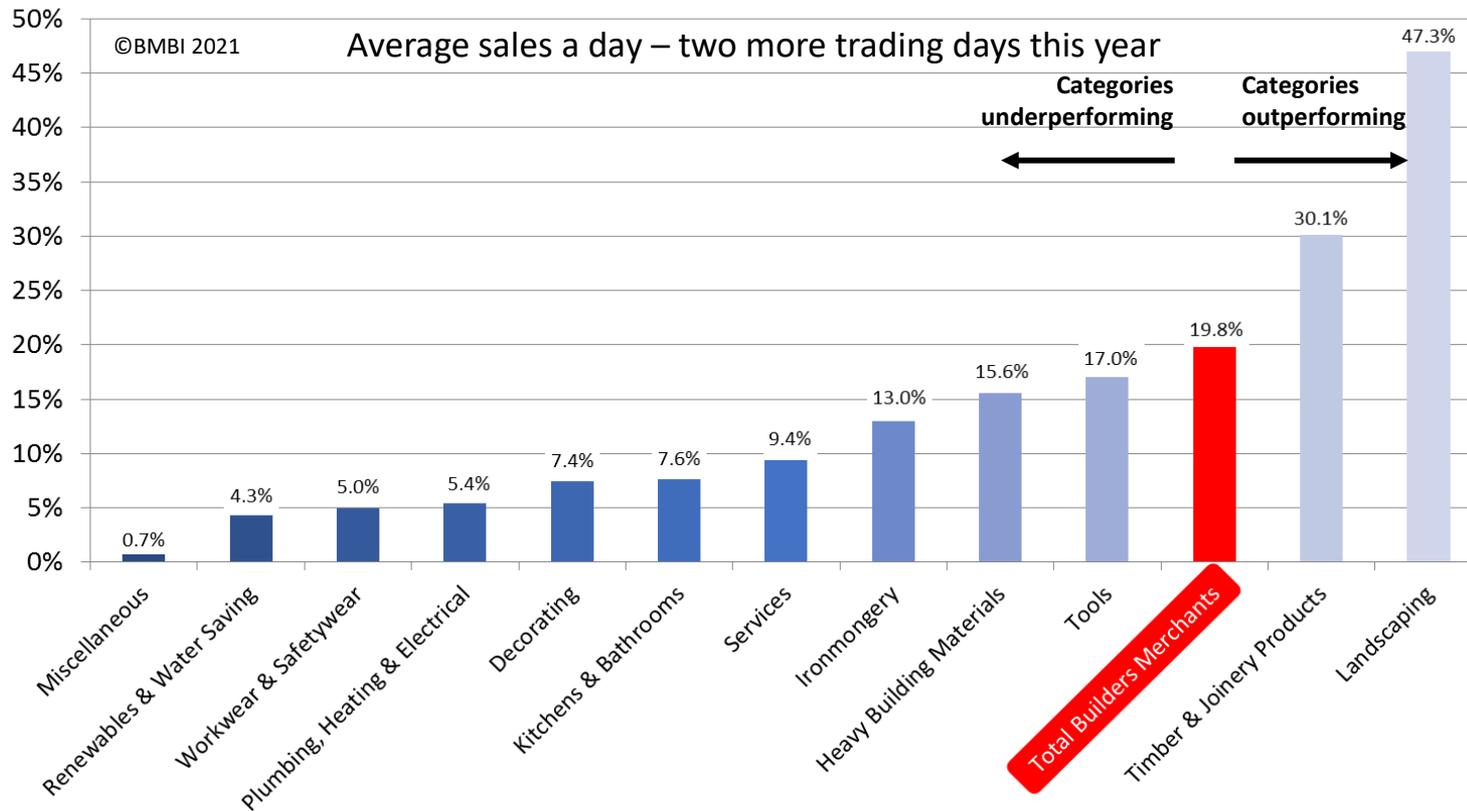


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Last 12 months: Year on Year

MAT average sales a day

12 months Jun 20 to May 21 v 12 months Jun 19 to May 20

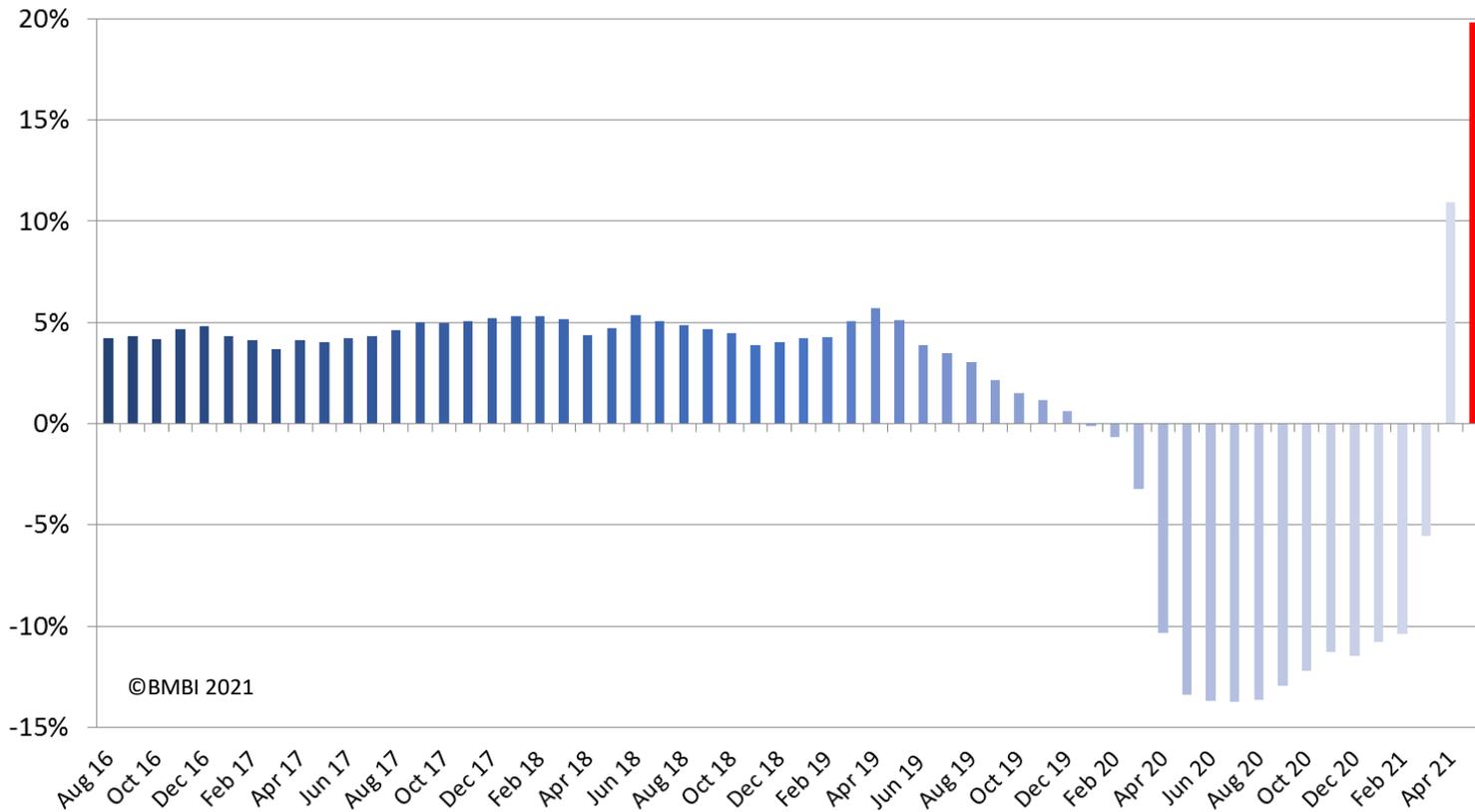


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

12 months: Year on Year

MAT

MAT: Total Builders Merchants August 2016 to May 2021



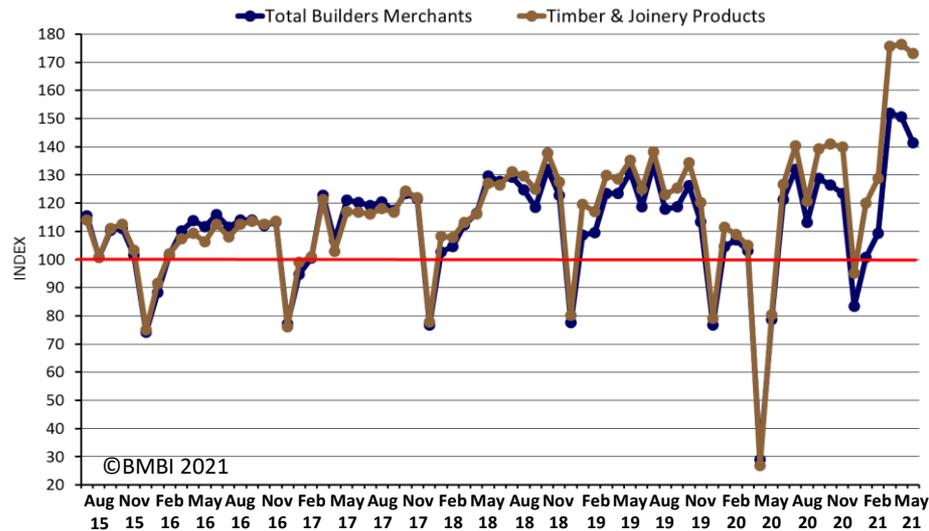
©BMBI 2021

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

Monthly: Indices

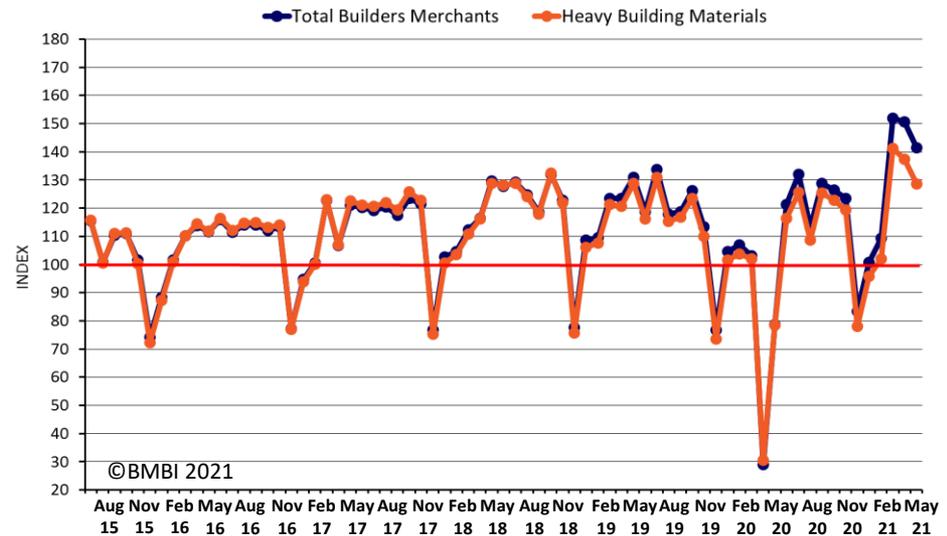
May 2021

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



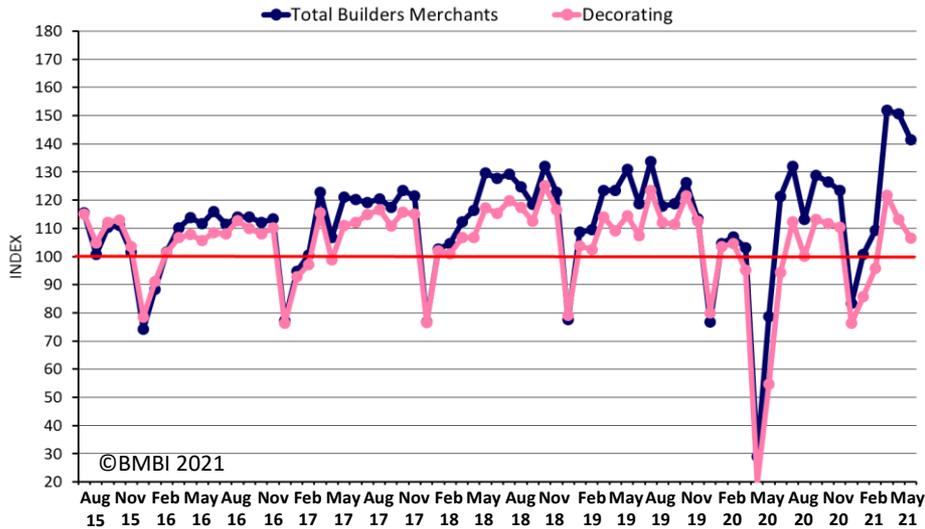
Indexed on July 2014 – June 2015

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

Monthly: Indices

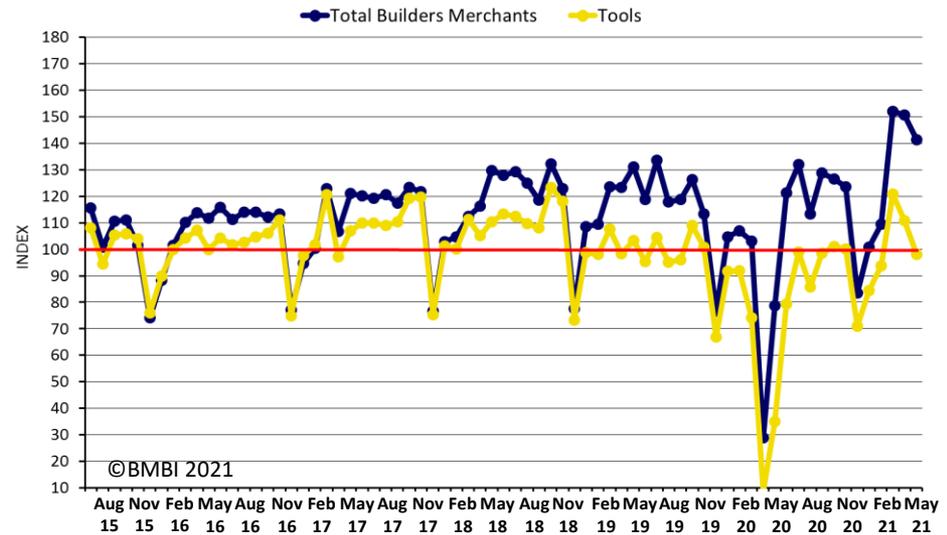
May 2021

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 May 2021

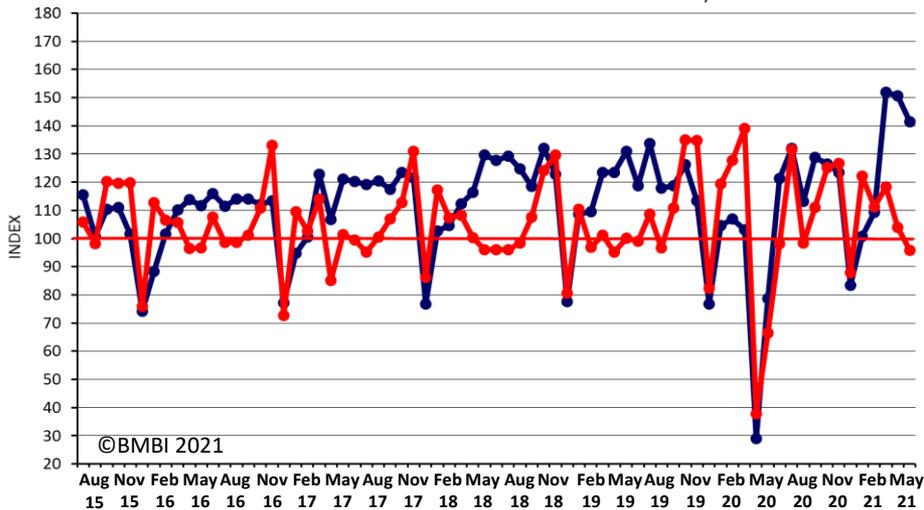
Monthly: Indices

May 2021



Workwear & Safetywear

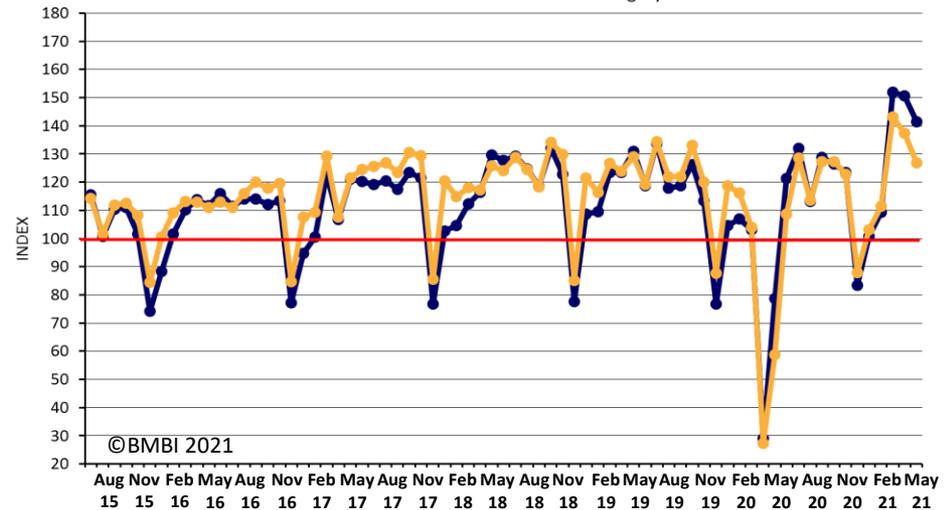
—●— Total Builders Merchants —●— Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery

—●— Total Builders Merchants —●— Ironmongery



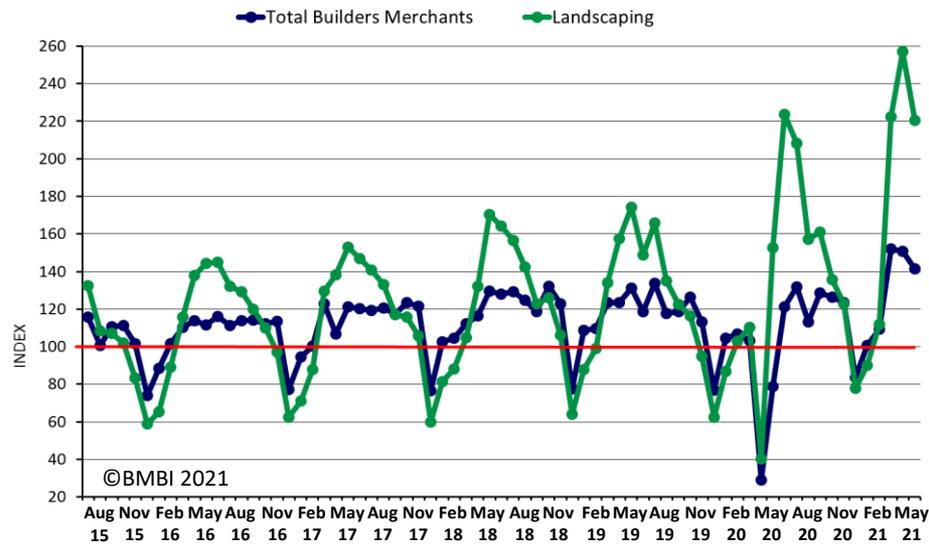
Indexed on July 2014 – June 2015

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

Monthly: Indices

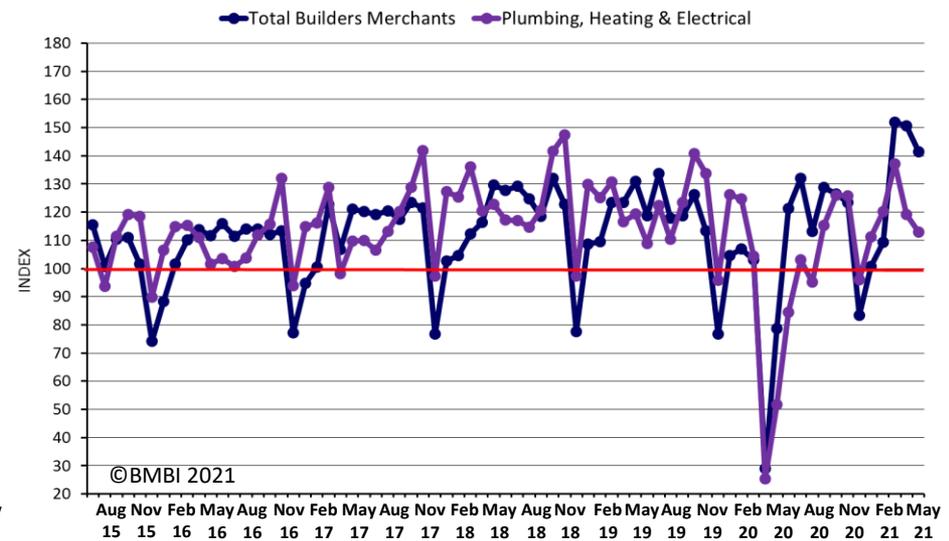
May 2021

Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

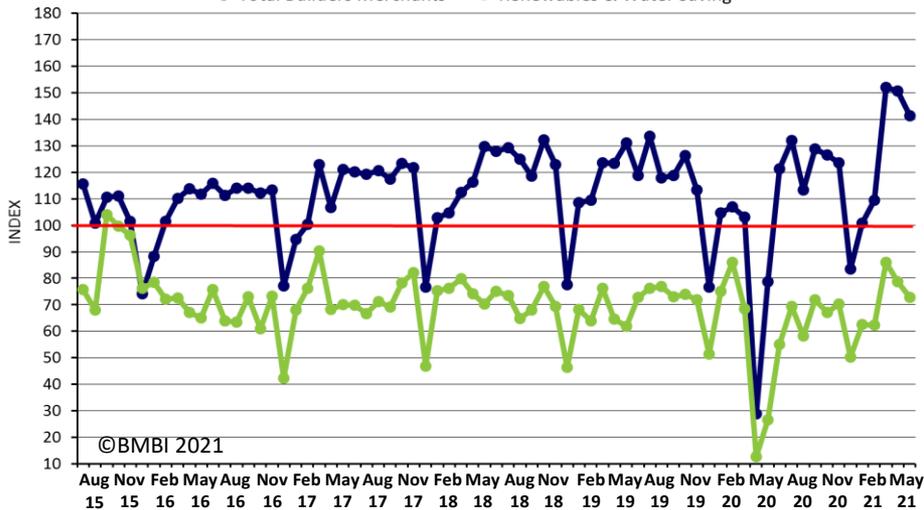
Monthly: Indices

May 2021



Renewables & Water Saving

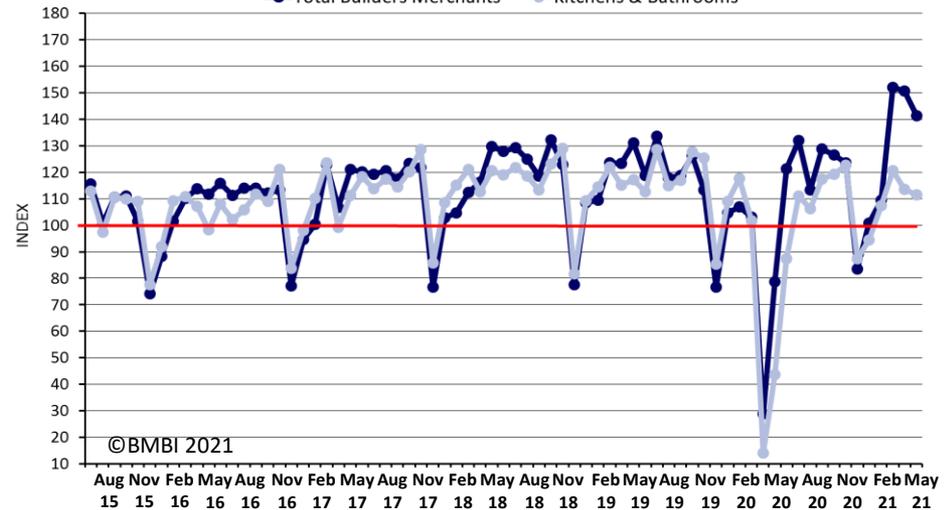
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms

● Total Builders Merchants ● Kitchens & Bathrooms



Indexed on July 2014 – June 2015

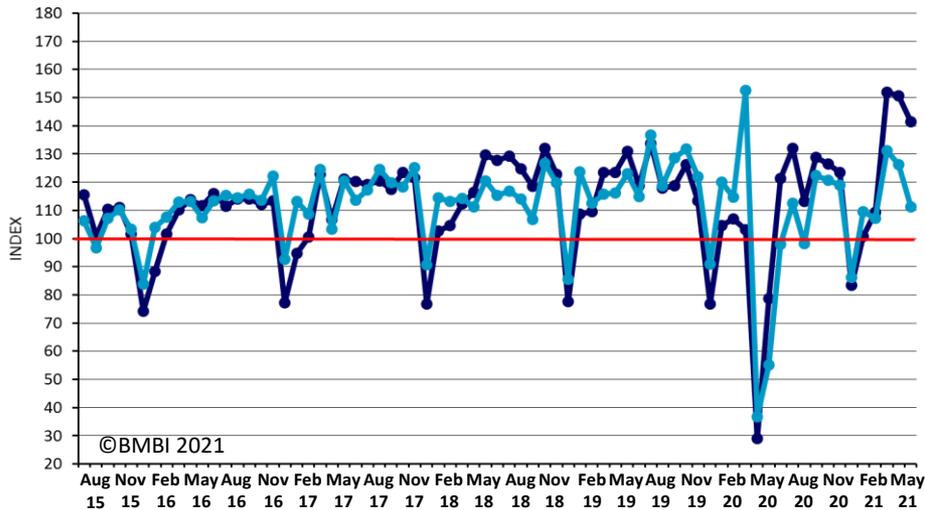
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to May 2021

Monthly: Indices

May 2021

Miscellaneous

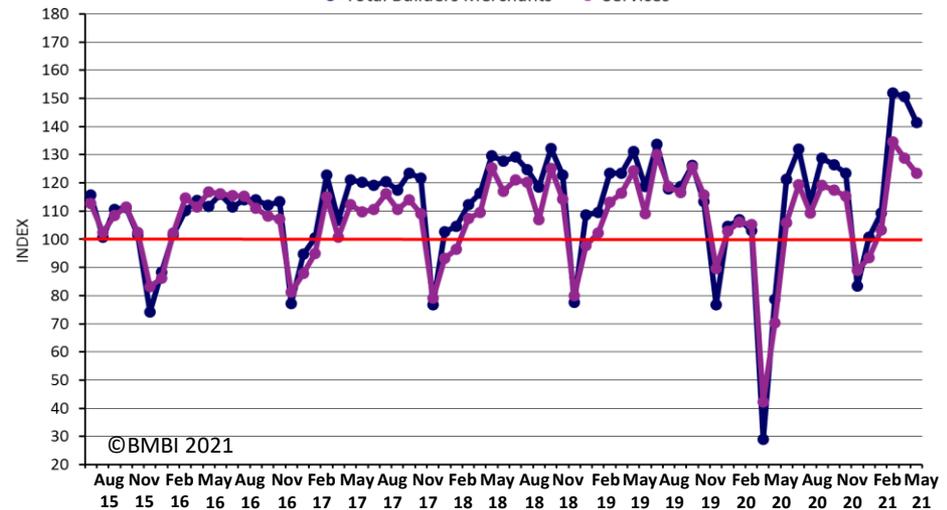
◆ Total Builders Merchants ◆ Miscellaneous



Indexed on July 2014 – June 2015

Services

◆ Total Builders Merchants ◆ Services



Indexed on July 2014 – June 2015

Trading Days

Monthly

Index: 20.8

2015											
						Jul 22	Aug 20	Sep 22	Oct 22	Nov 21	Dec 17
2016											
Jan	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							

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			

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

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 May 2021

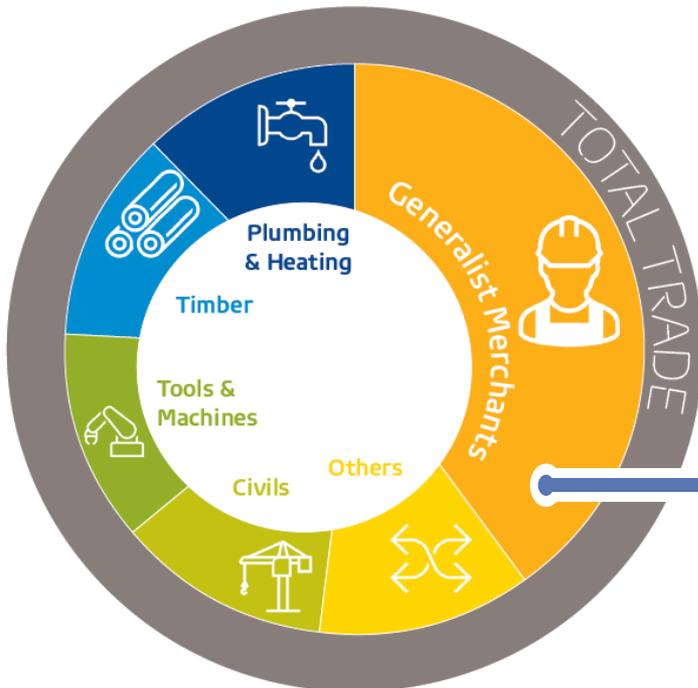
GfK's Definition of Builders Merchant Panel



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

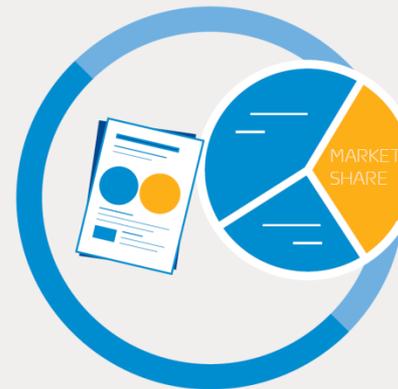
Miscellaneous

Cleaning/Domestic/Personal
Automotive
Glass
Other Furniture & Shelving
Other Misc

Services

Toolhire / Hire Services
Other Services

TOTAL CATEGORY REPORT (TCR)



TRACKED PRODUCT GROUP REPORTING



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



May 2021

(Published 19 July 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 Tom Rigby: 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.

Overview and Insights

Last year's Covid confusion helps plumbing and heating merchants double sales in May

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 111.6% in May 2021 compared to May 2020 (see [page 59](#)) - a time when many branches remained closed due to confusion over Covid-19 restrictions.

Compared with two years ago, May 2021 sales were flat (-0.1%), but with two less trading days this year average sales a day were 10.4% higher than in May 2019.

Total value sales in May were 4.3% lower than in April, with one less trading day this month ([page 60](#)). Average sales a day were 0.7% higher.

Sales in the three months March to May 2021 were 81.8% up on the same three months last year, helped by one more trading day this year and a fully opened market ([page 61](#)). Average sales a day were 78.8% higher.

Sales in March to May 2021 were 6.1% up on the same three months in 2019, with no difference in trading days.

Comparing the three months March to May 2021 with the previous 3 months (December to February) sales increased by 11.1%, helped by five more trading days in the most recent period ([page 62](#)). Average sales a day were 2.2% higher.

Sales in the first five months of 2021 were 36.5% higher than in January to May 2020, with one less trading day this year. Average sales a day were 37.8% higher.

Looking back two years, sales in the first five months of 2021 were 3.0% ahead of January to May 2019, with two less trading days this year. Average sales a day increased by 5.0%

Plumbing & Heating Merchants' sales in the 12 months June 2020 to May 2021 were 9.6% higher than in the same period a year earlier, with two more trading days in the most recent period. Average sales a day grew by 8.7%.

May's PHMI Index, which contrasts sales with the base period of January to December 2019, was 97.4 – see the table on [page 57](#) and the chart on [page 58](#). The table also shows the PHMI Index in the last three months (February to April) was higher, at 105.8.

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 111.6% in May 2021 compared with May 2020 – a time when many branches remained closed due to confusion over Covid-19 restrictions.

Indices: Monthly and quarterly

June 2020 to May 2021

(Indexed on January to December 2019)

Jun 20	Jul 20	Aug 20	Three months
73.4	88.3	85.9	82.5
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

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:

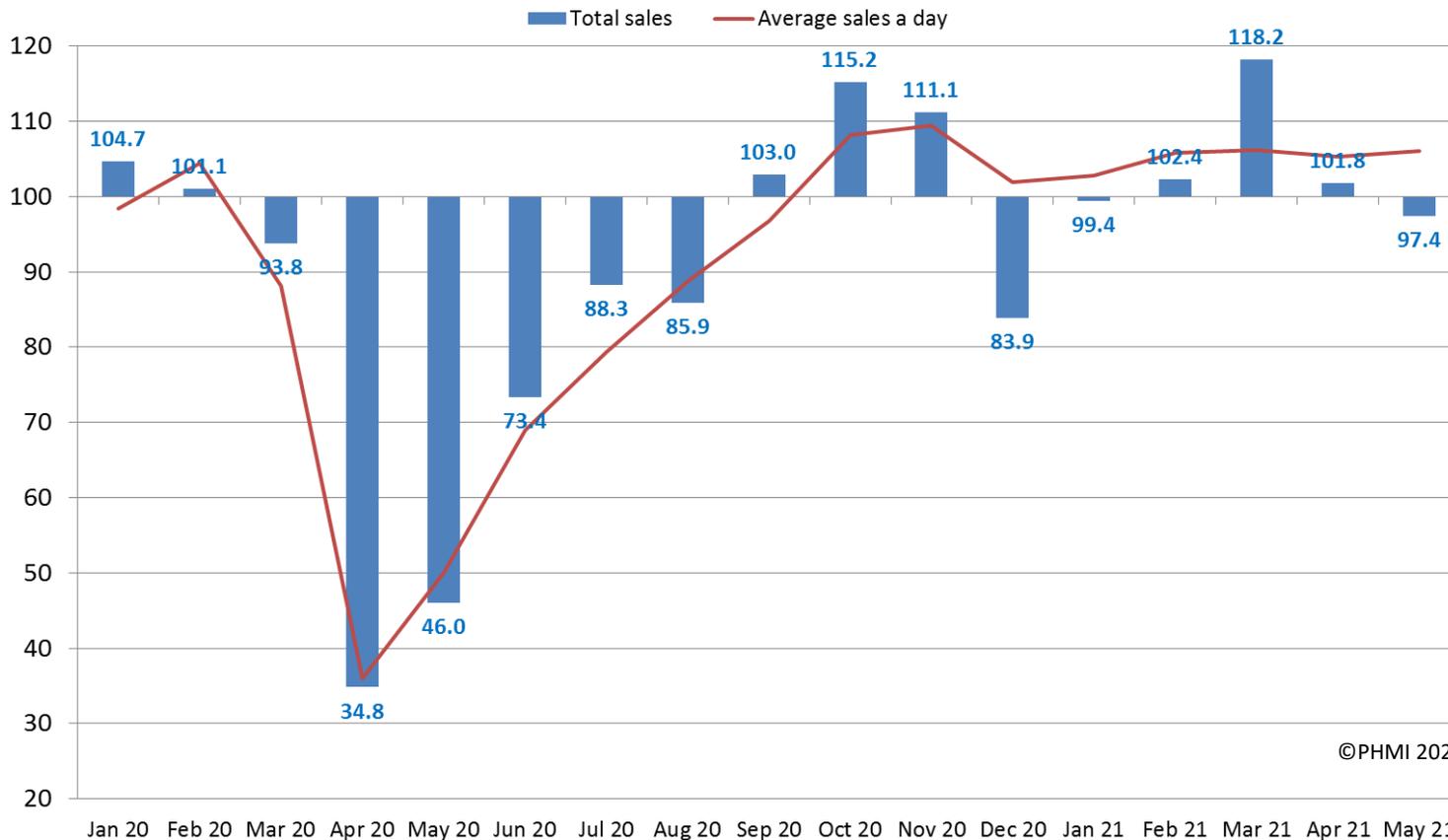
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. May's Index of 97.4 means turnover was 2.6% lower than the base period.

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

Monthly: Index

Adjusted and unadjusted for trading days*

Indices: January 2020 to May 2021



Values shown
for Total sales

©PHMI 2021

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

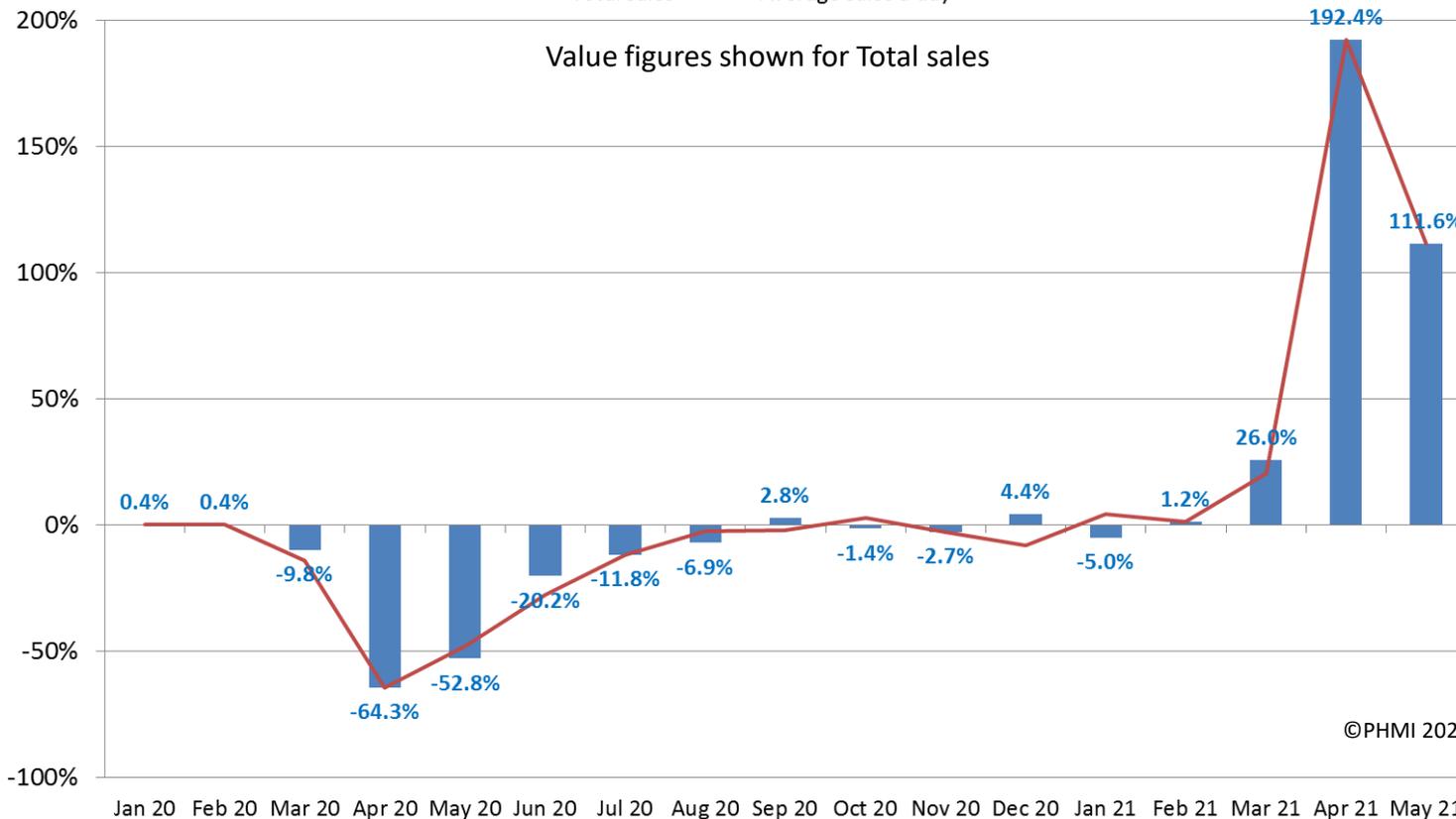
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted for trading days*

Month: year on year

■ Total sales — Average sales a day



+111.6% is more than double last year's value sales.

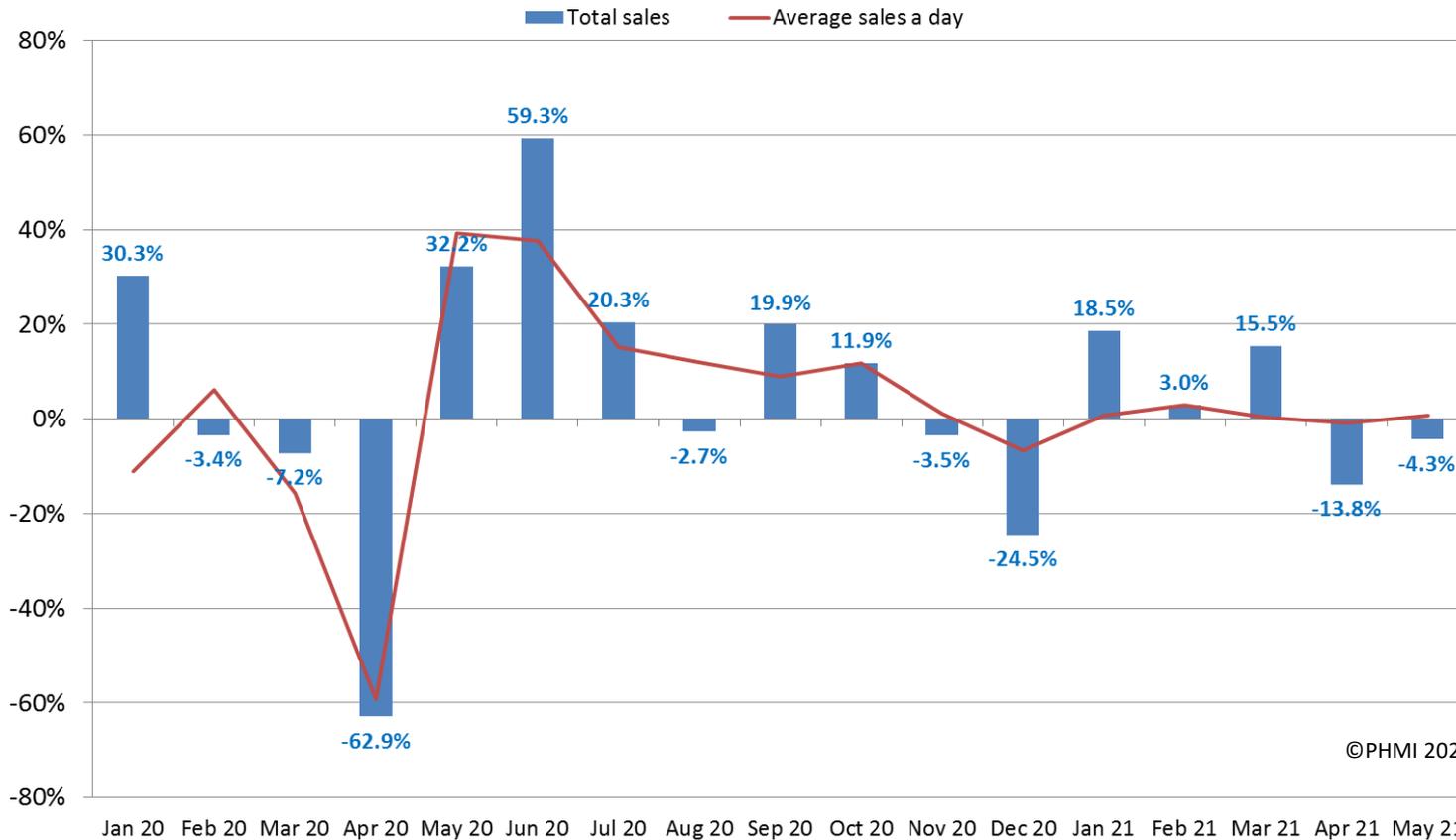
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

Monthly: Month v previous month

Sales indices, adjusted and unadjusted
for trading days*

Month v previous month



Values shown
for Total sales

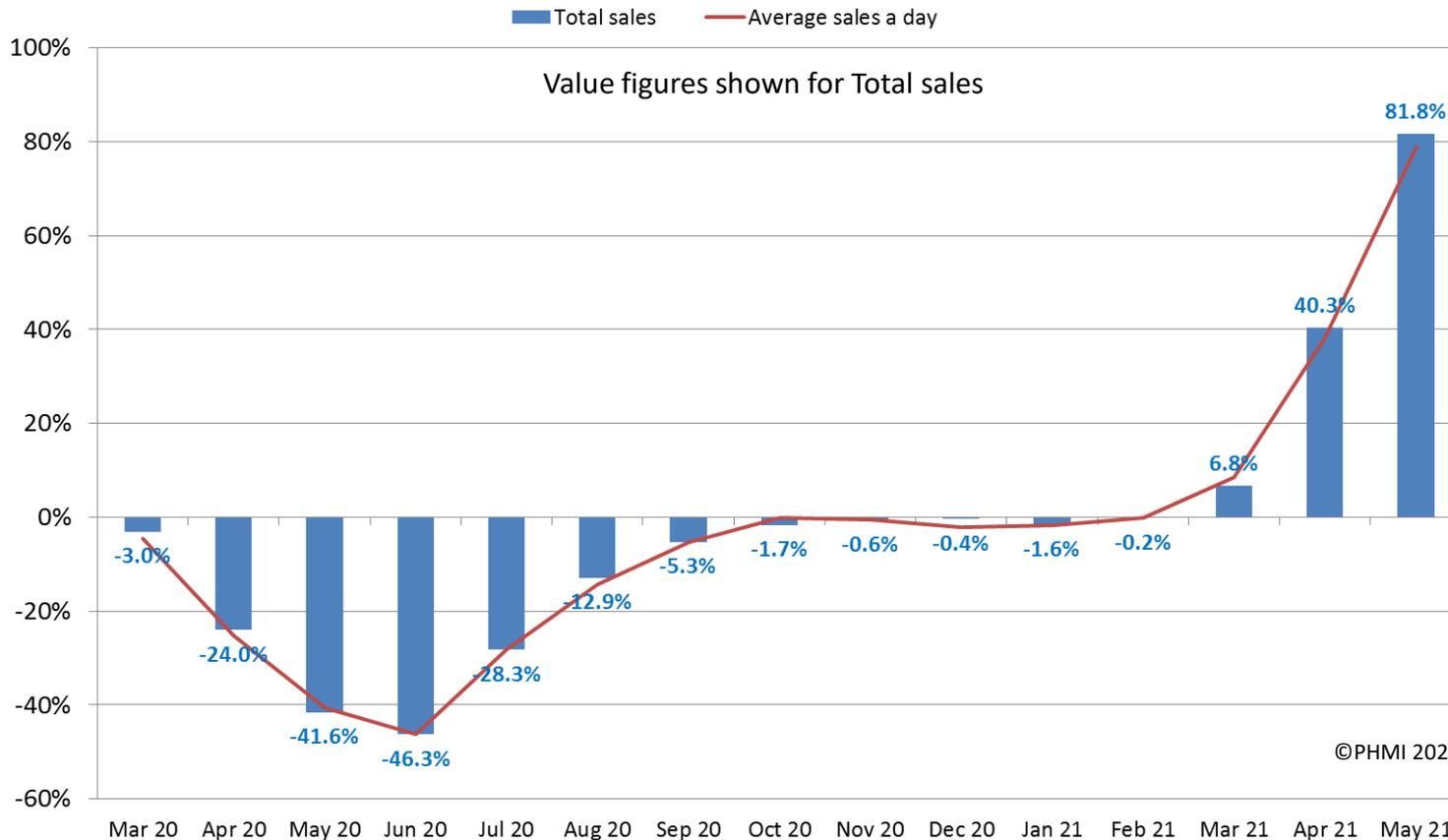
©PHMI 2021

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

Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted
for trading days*

Rolling 3 months: year on year



Eg. May 21 shows sales in the three months March to May were 81.8% higher than the same three months last year.

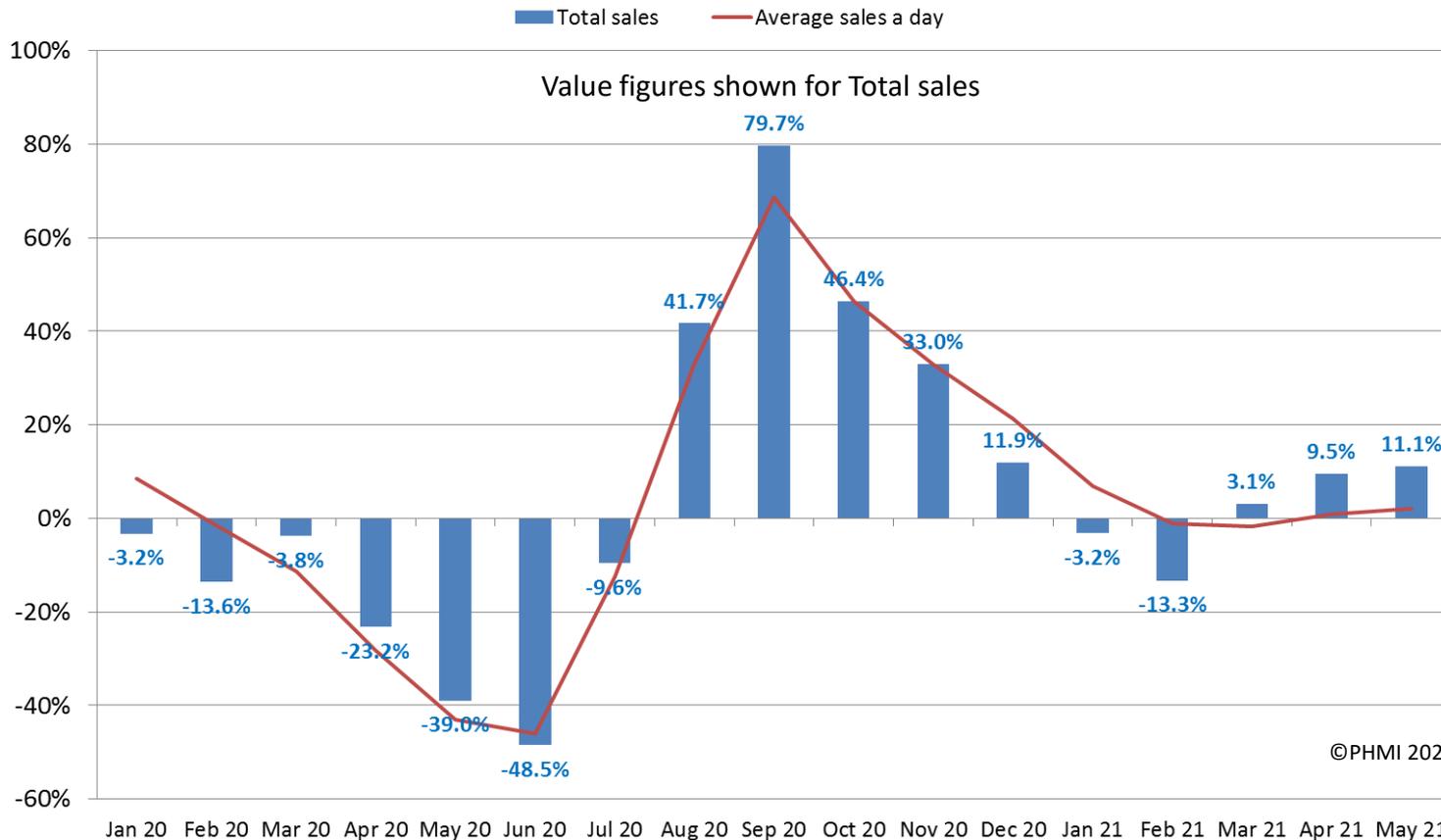
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted
for trading days*

Rolling 3 months v previous 3 months



Eg. May 21 shows the three months Mar-May were 11.1% higher than the three months Dec 20 to Feb 21

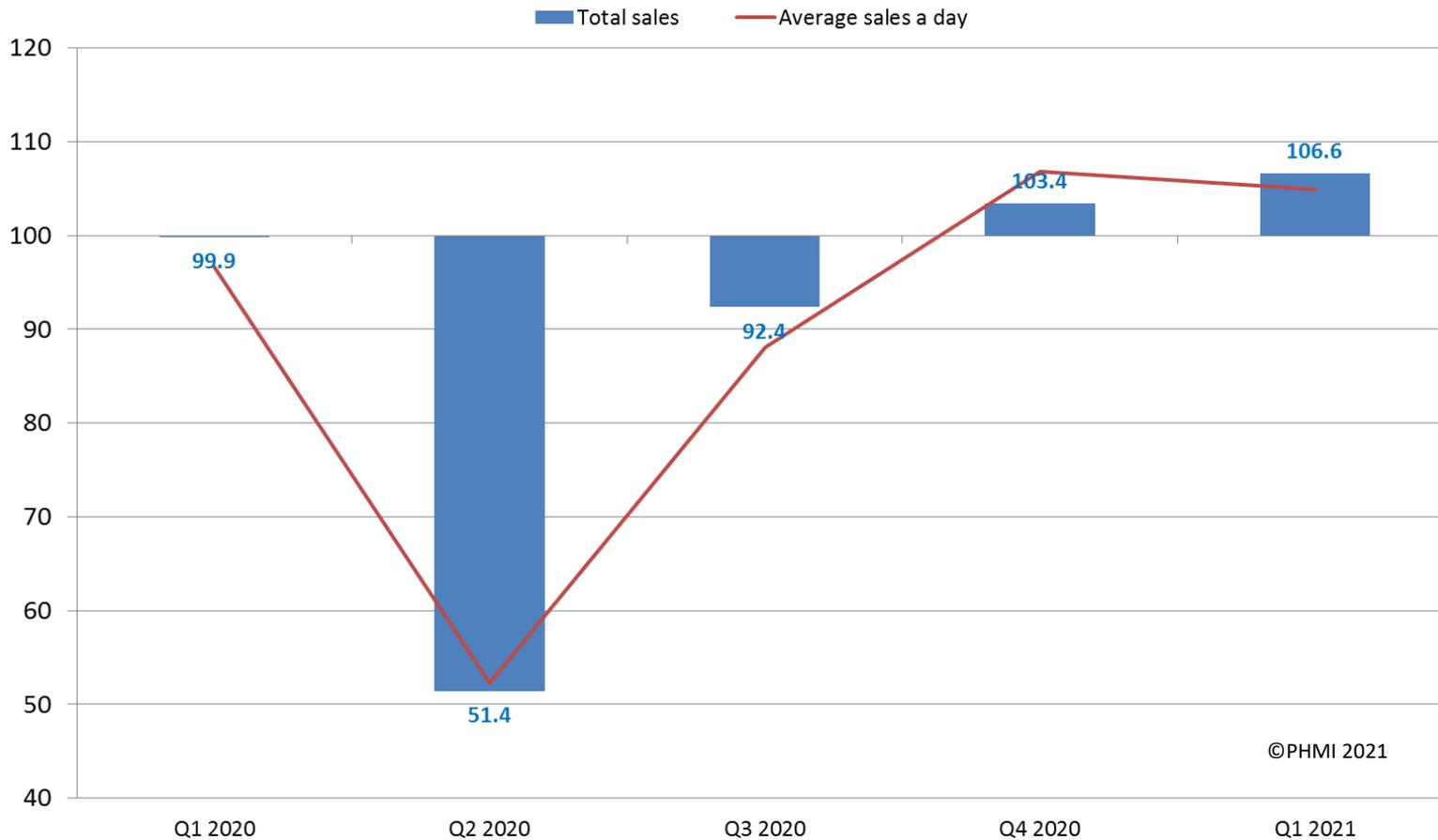
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

Quarterly: Index

Adjusted and unadjusted for trading days

Indices: Q1 2020 to Q1 2021



Value figures
shown for Total
sales

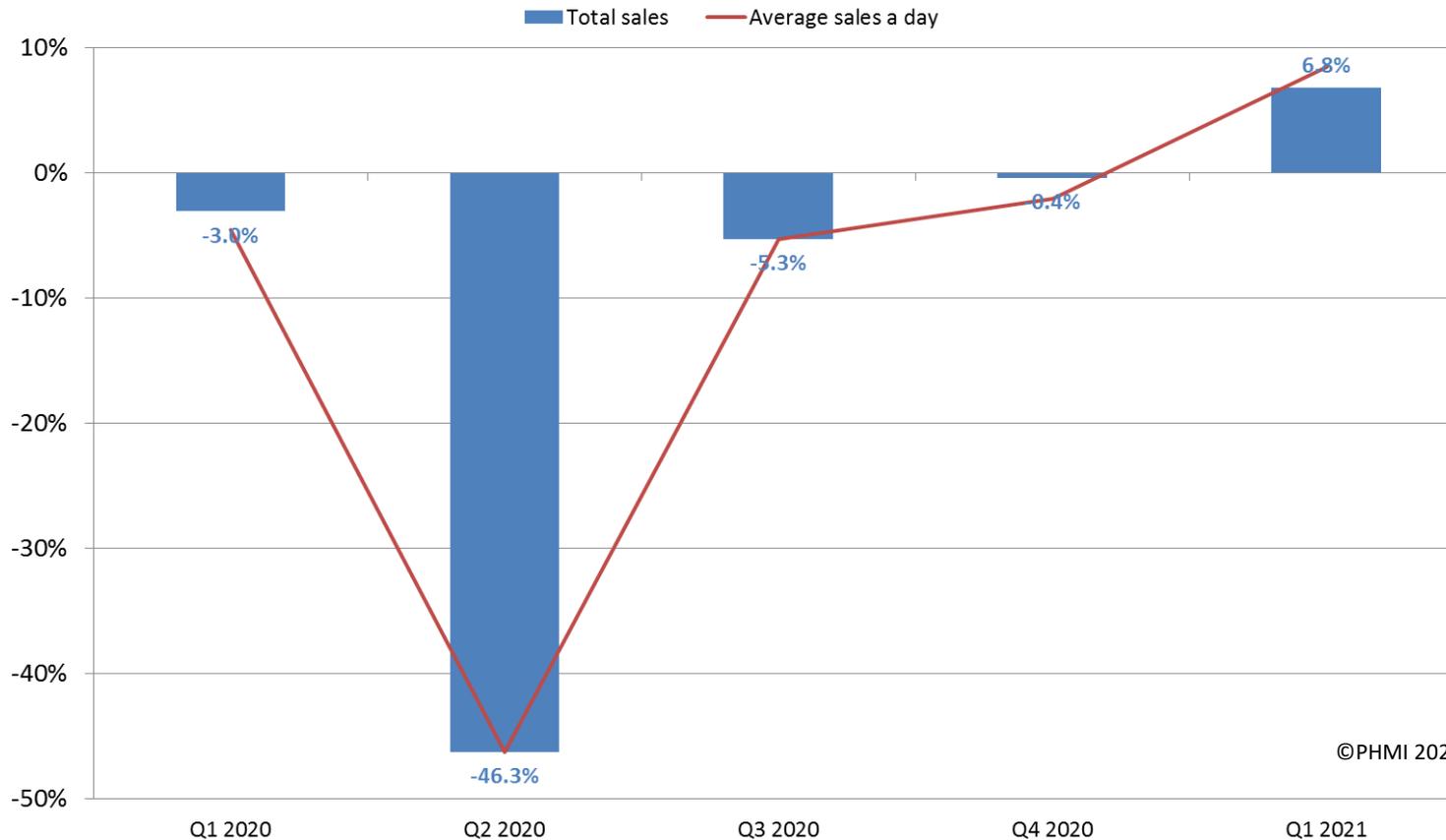
©PHMI 2021

 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.

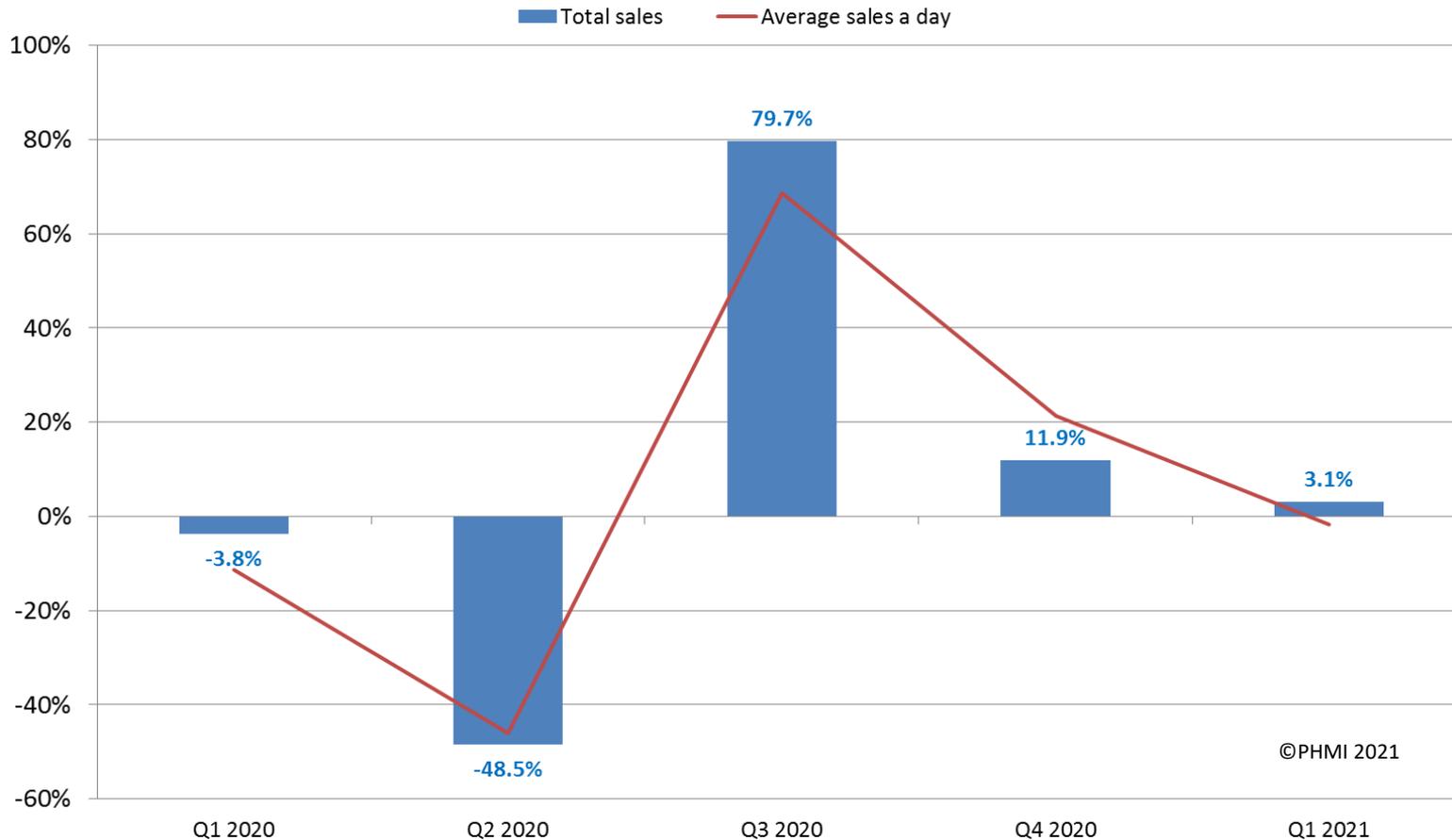
Quarterly: Quarter v previous quarter

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	19							

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

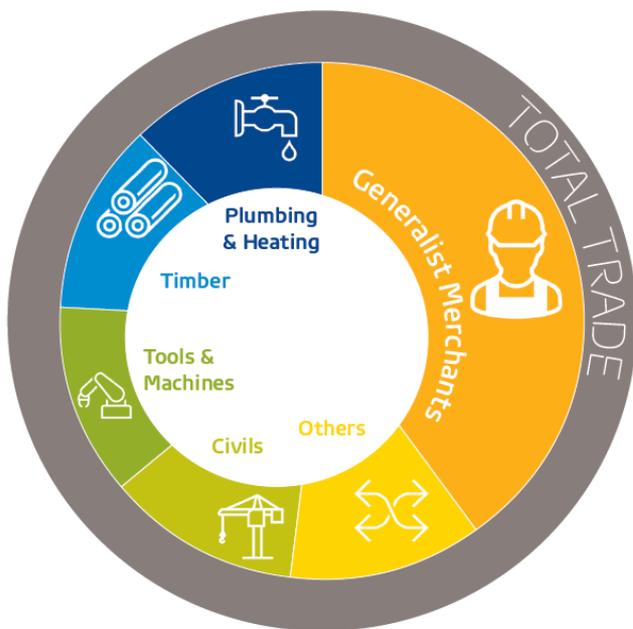
Full Year

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 & Heating Merchant Index



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

+44 (0) 7392 081276



Ralph Sutcliffe

Business Development
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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

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“building **excellence**
in materials supply”



BMF Forecast Report & BMF Sales Indicators

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 Richard Ellithorne on 024 7685 4980 or email: richard.ellithorne@bmf.org.uk



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**Builders Merchants
Industry Forecast**
2021

Year in Review
Spring Edition
£250

The BMF. Building your people. Building your skills. Building your business. Building your voice. Building excellence.

Contact us

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