

“building **excellence**
in materials supply”

Plumbing & Heating Merchant Index



August 2021

(Published 19 October 2021)

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 or Toby Aiken: toby@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:

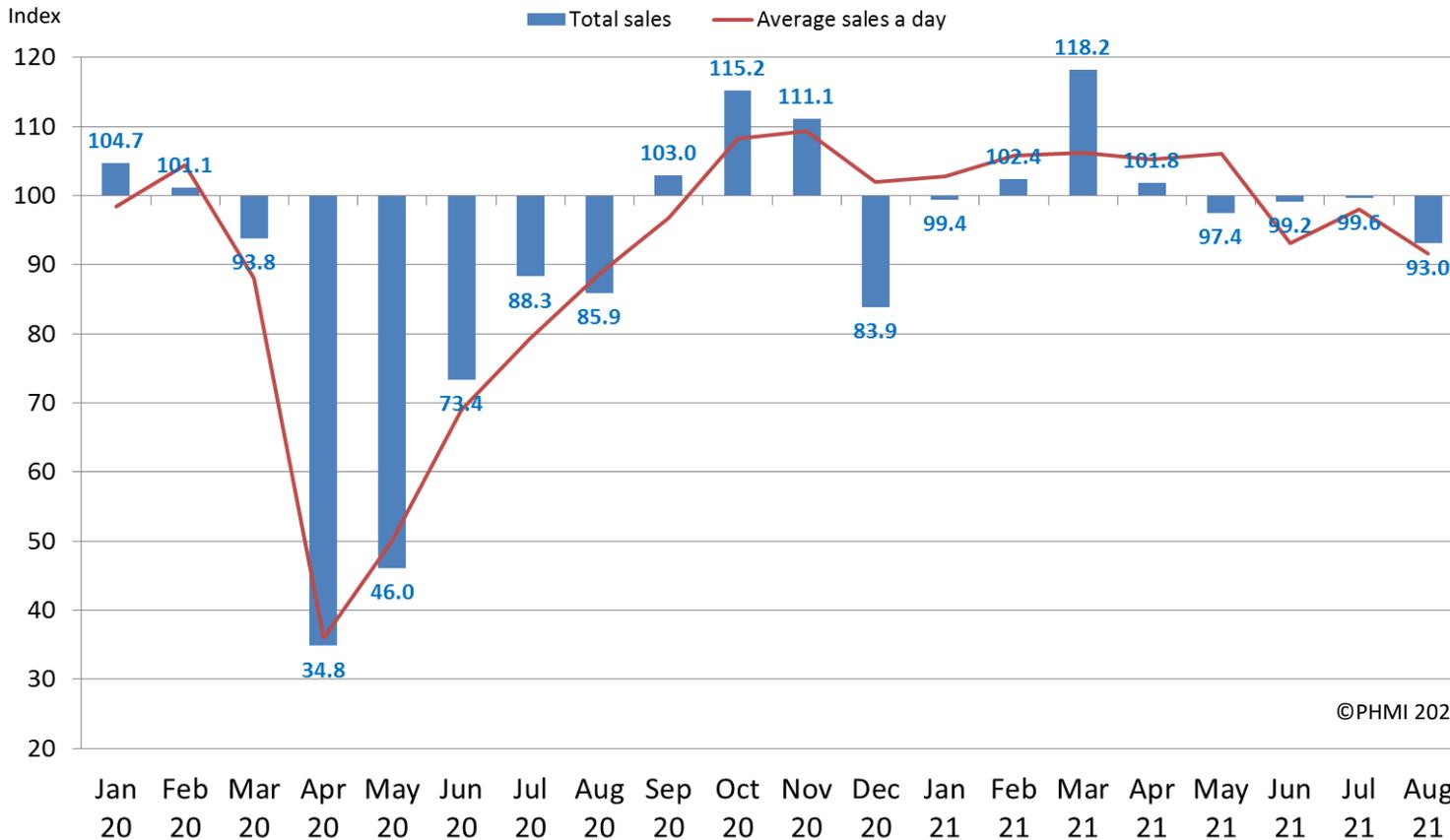
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. August's Index of 93.0 means turnover was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

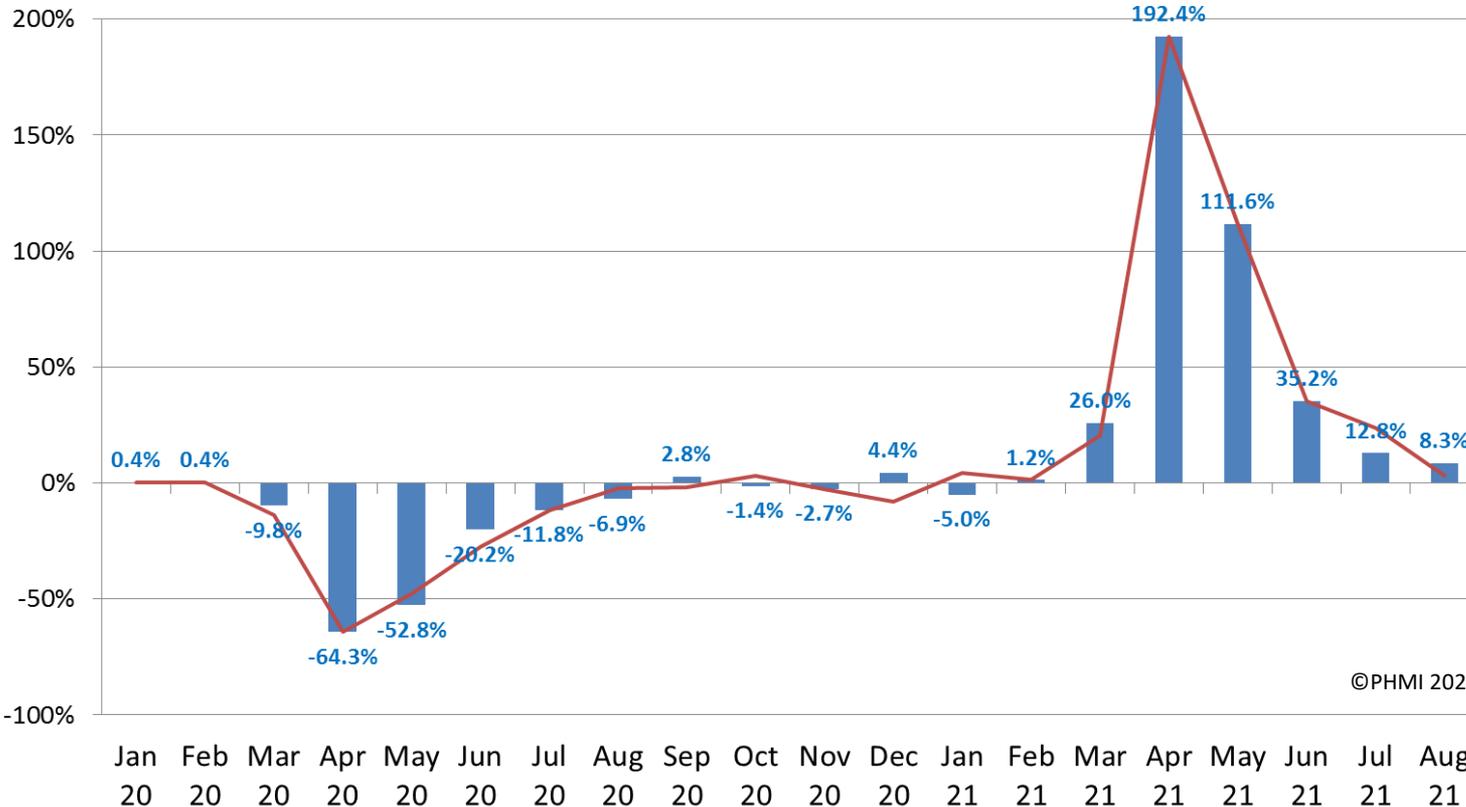
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

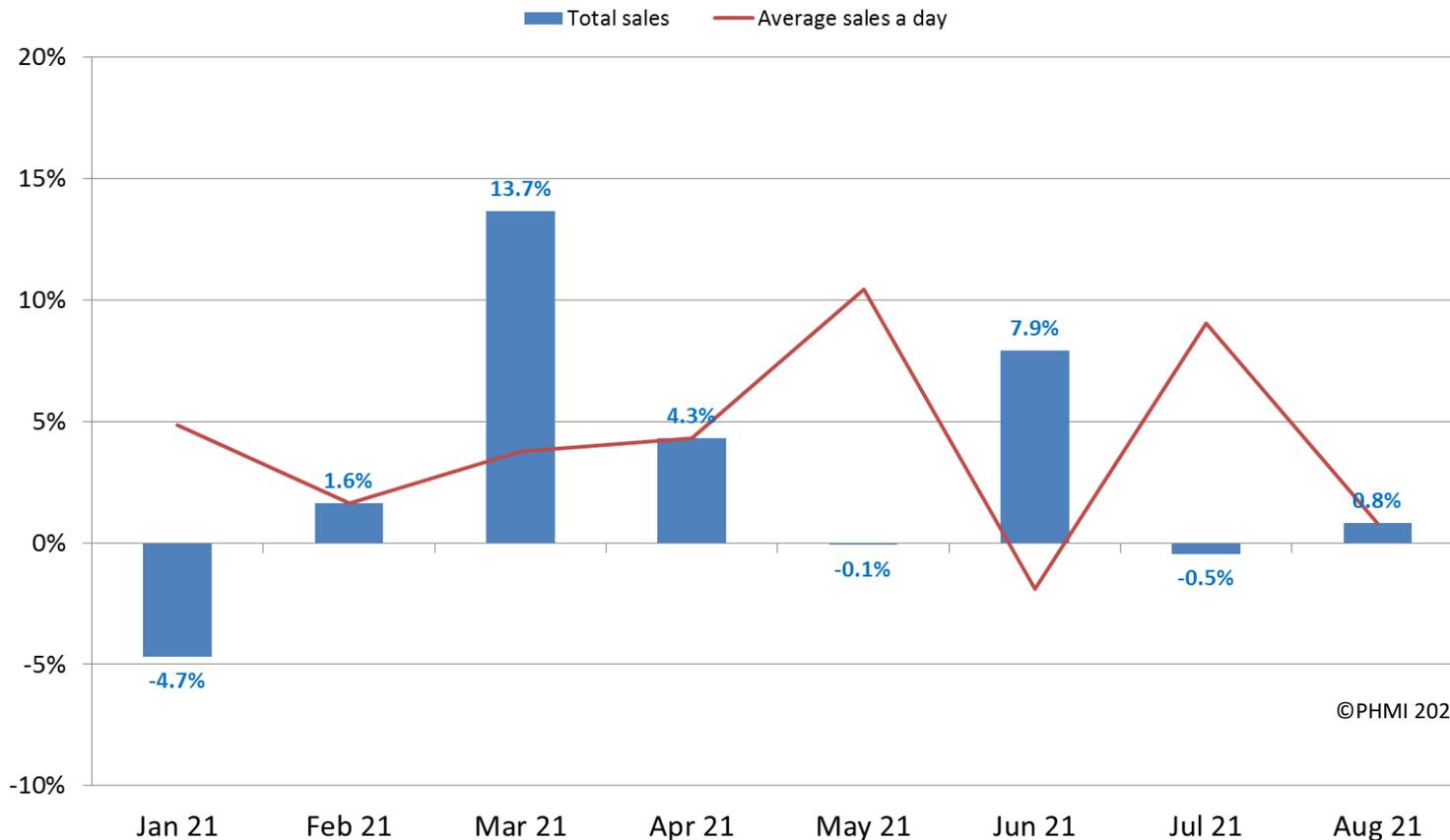
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

*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

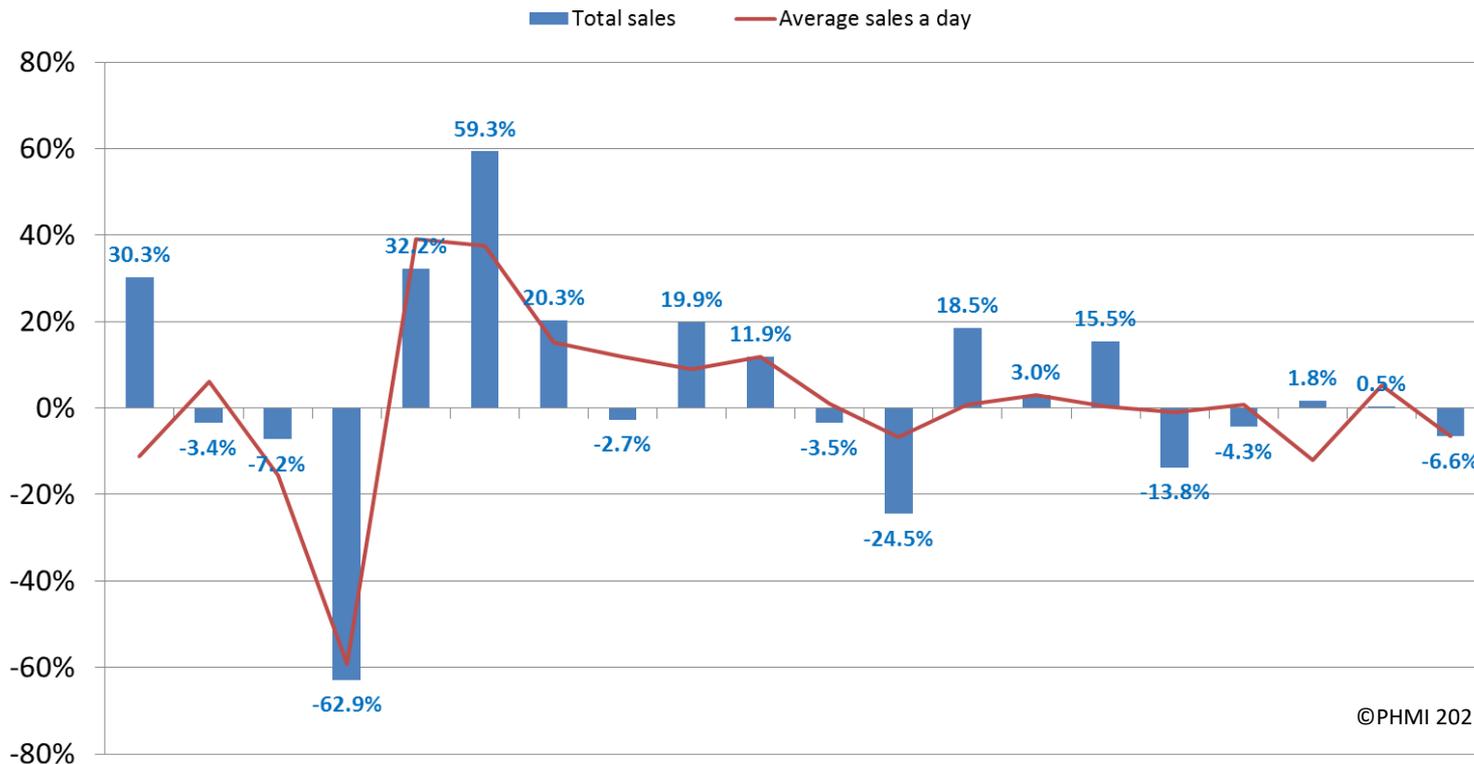
 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Aug 2021

*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

©PHMI 2021

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.

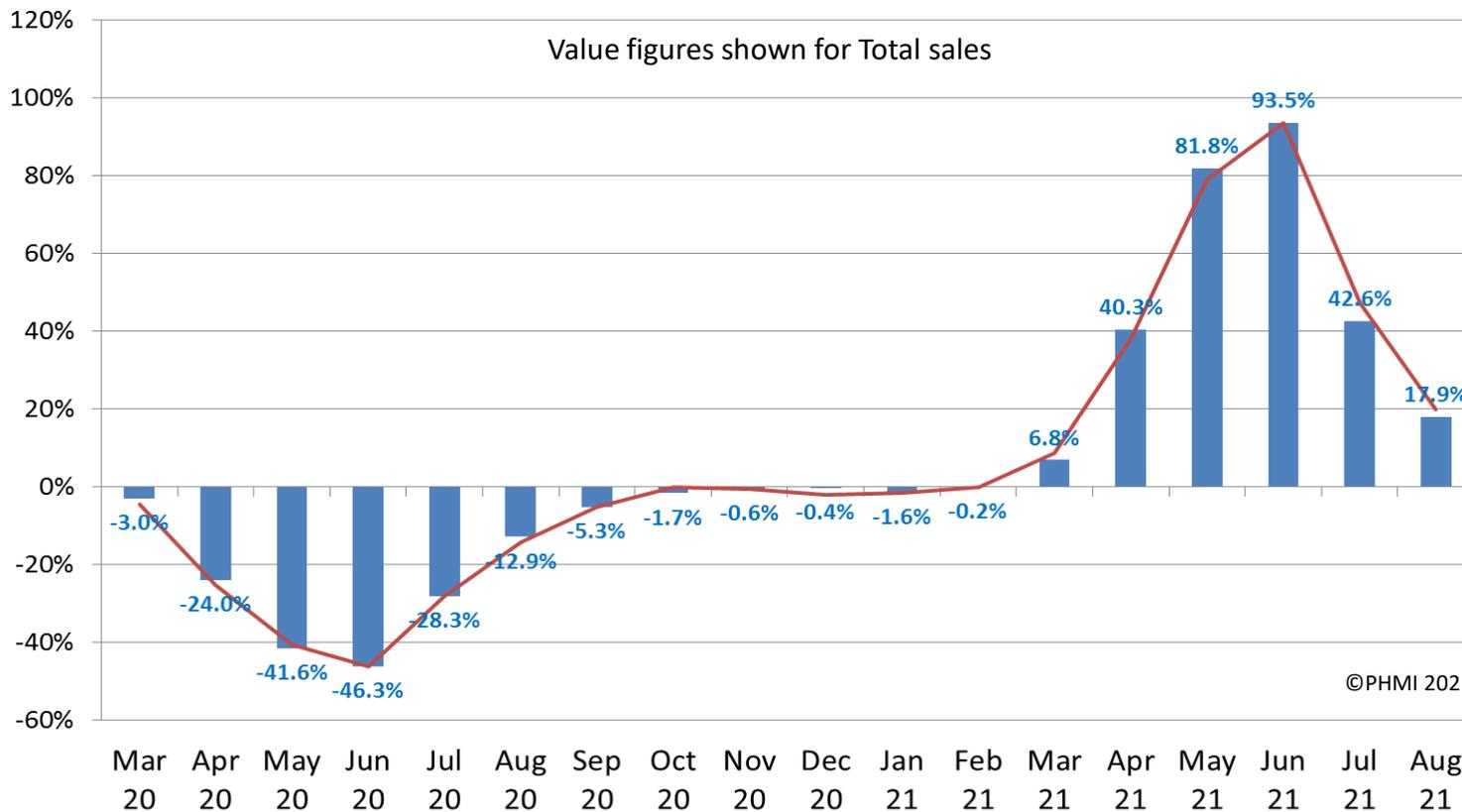
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

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.

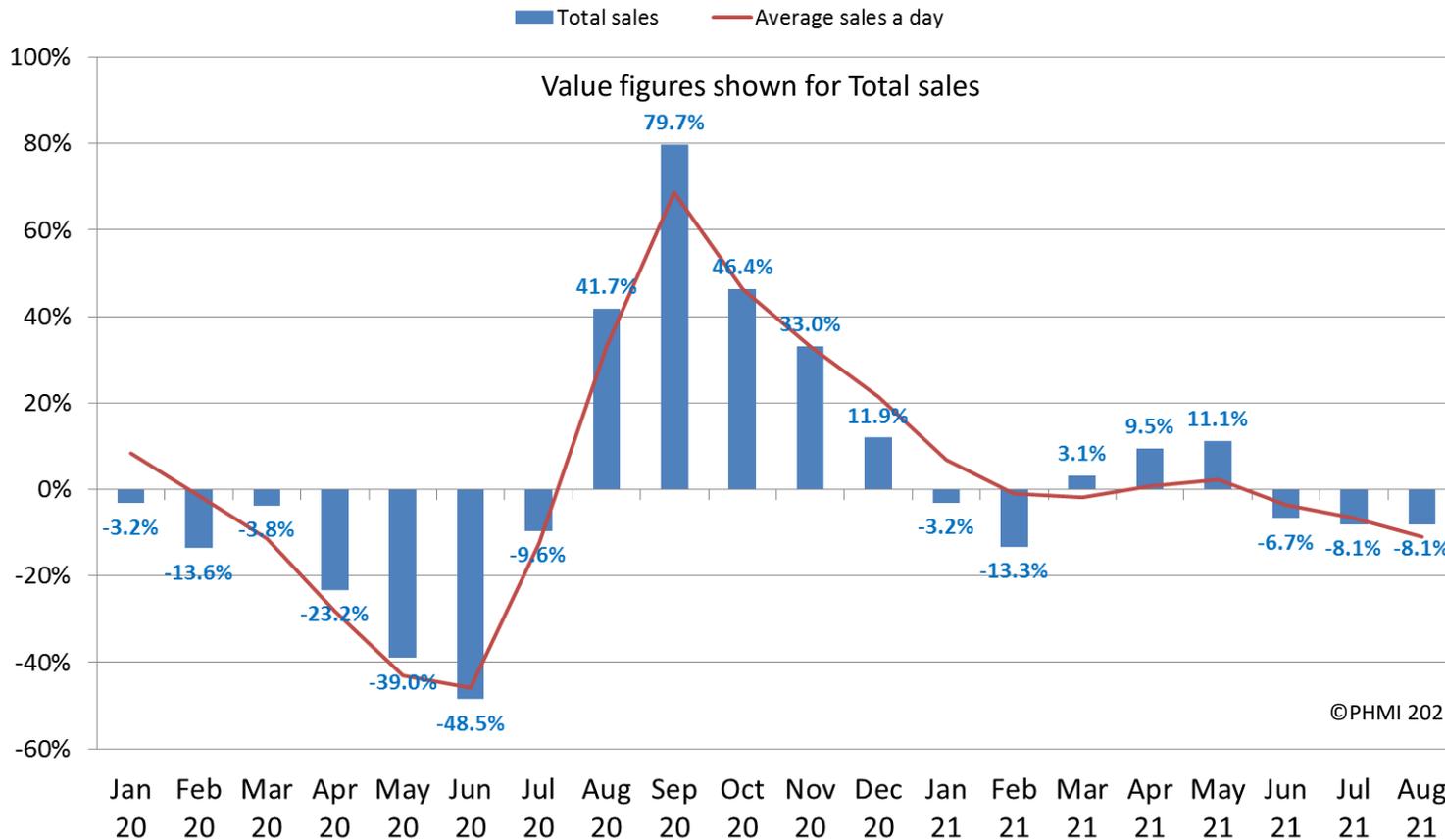
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Aug 2021

*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

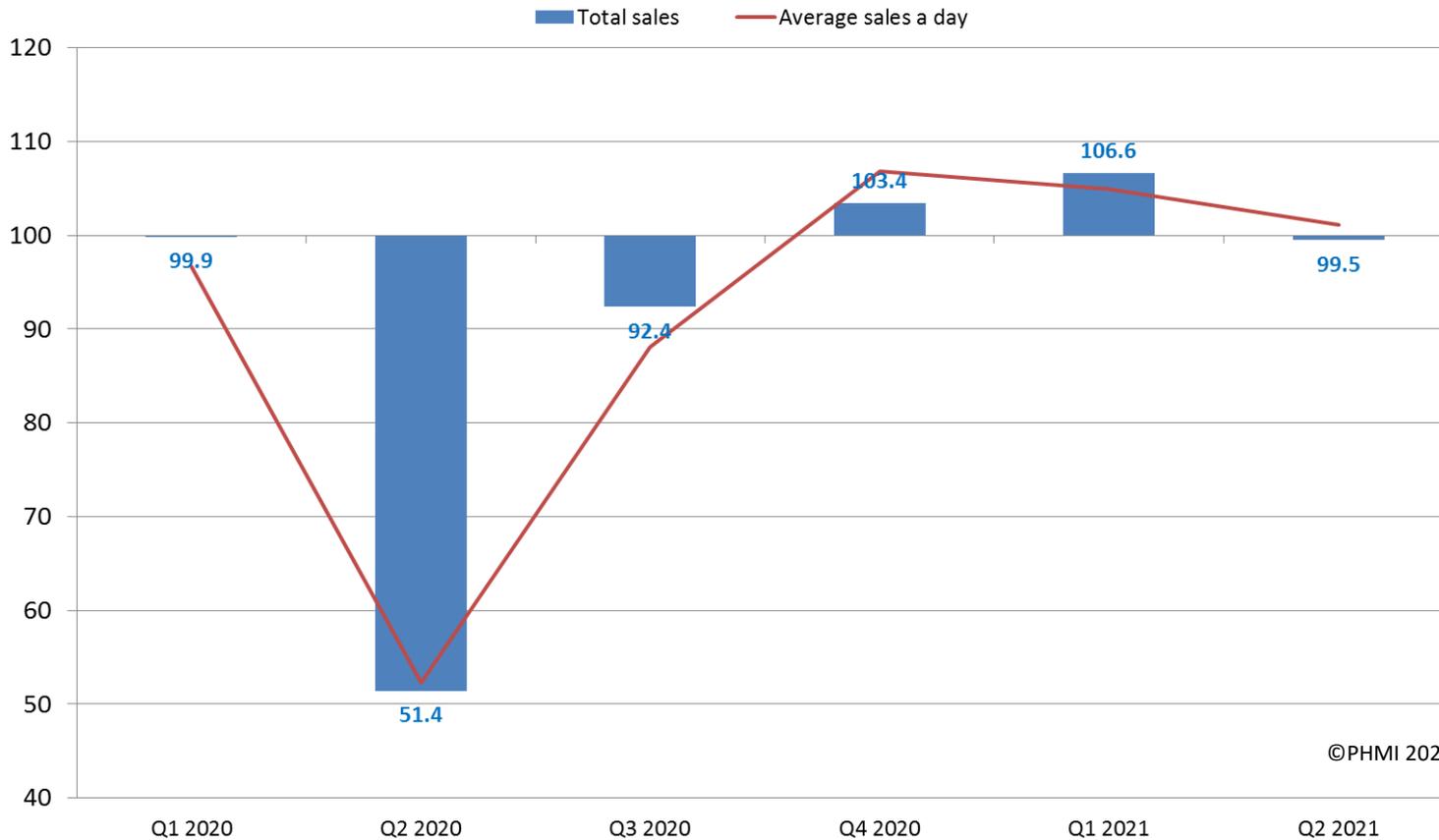
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

 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

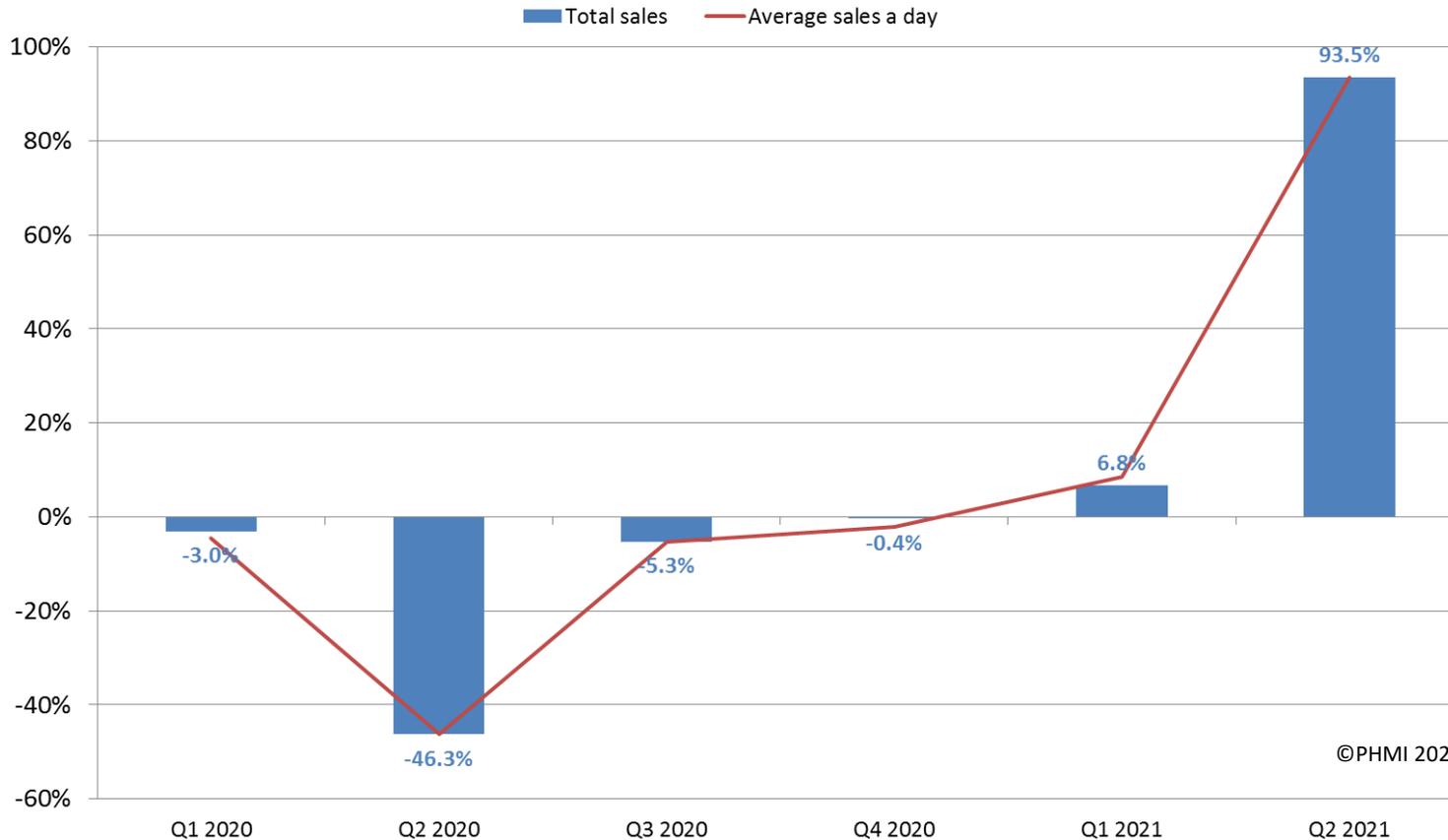
©PHMI 2021

 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

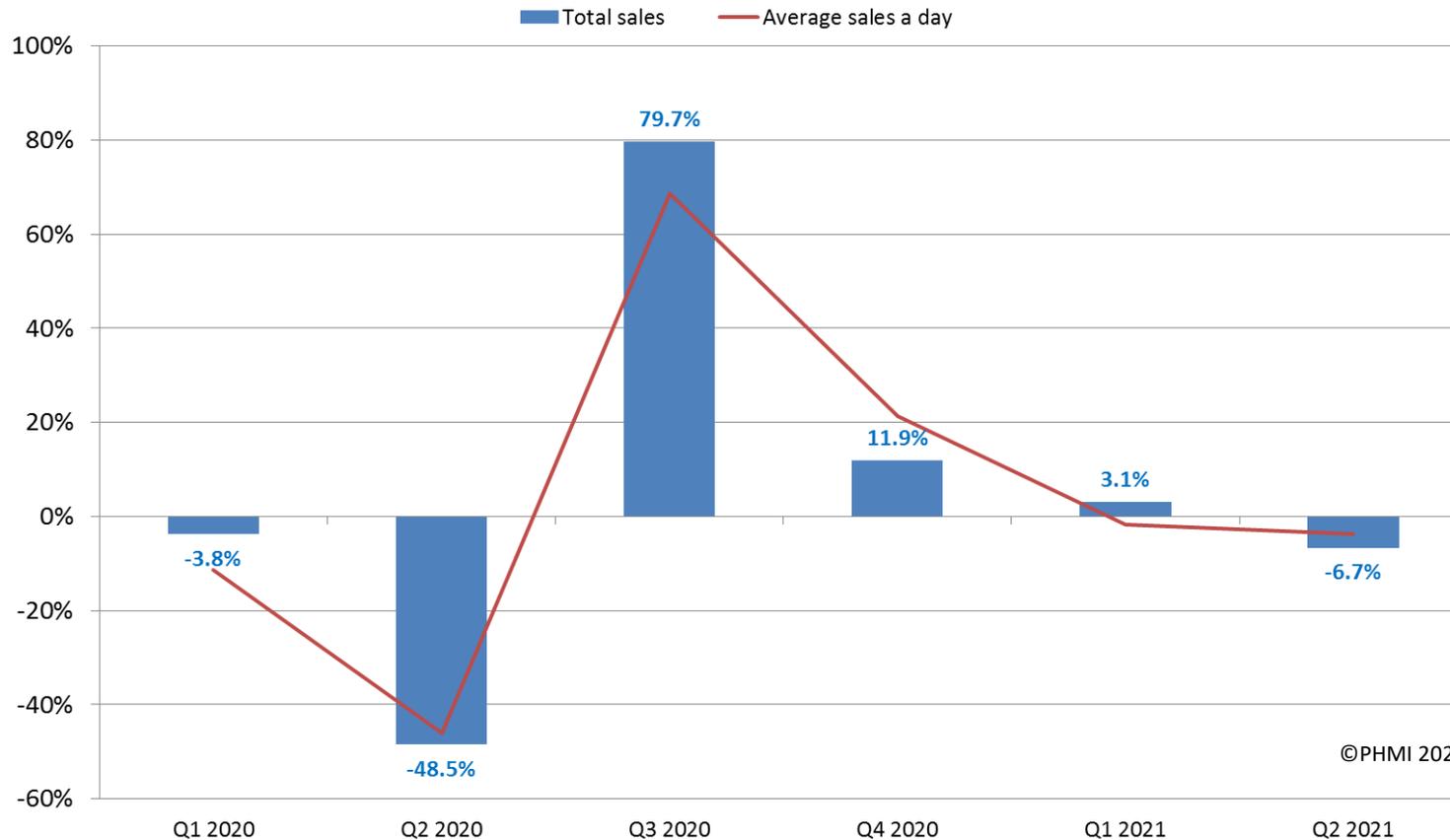
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Jun 2021

*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.

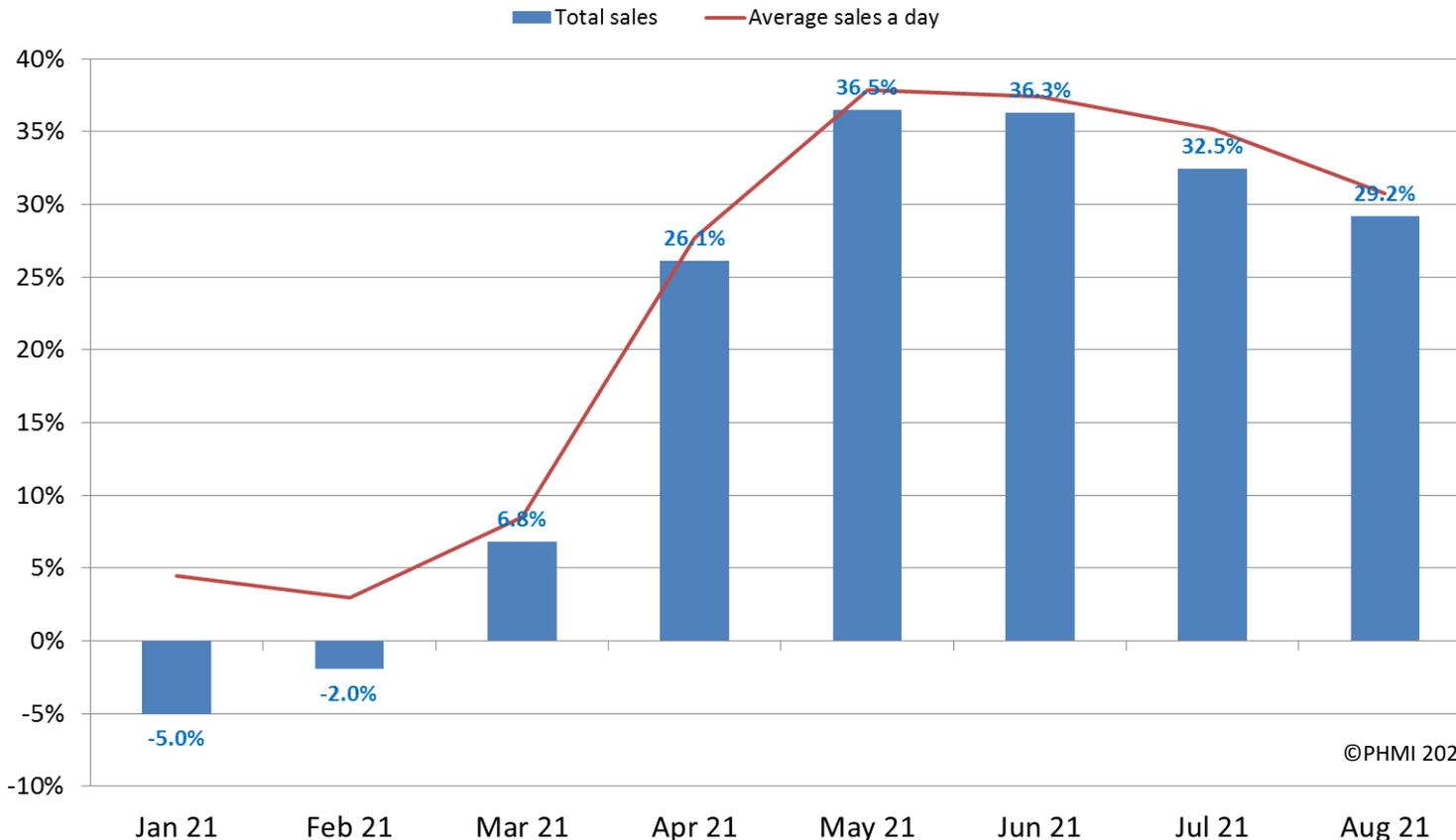
Year To Date: Year on year

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.

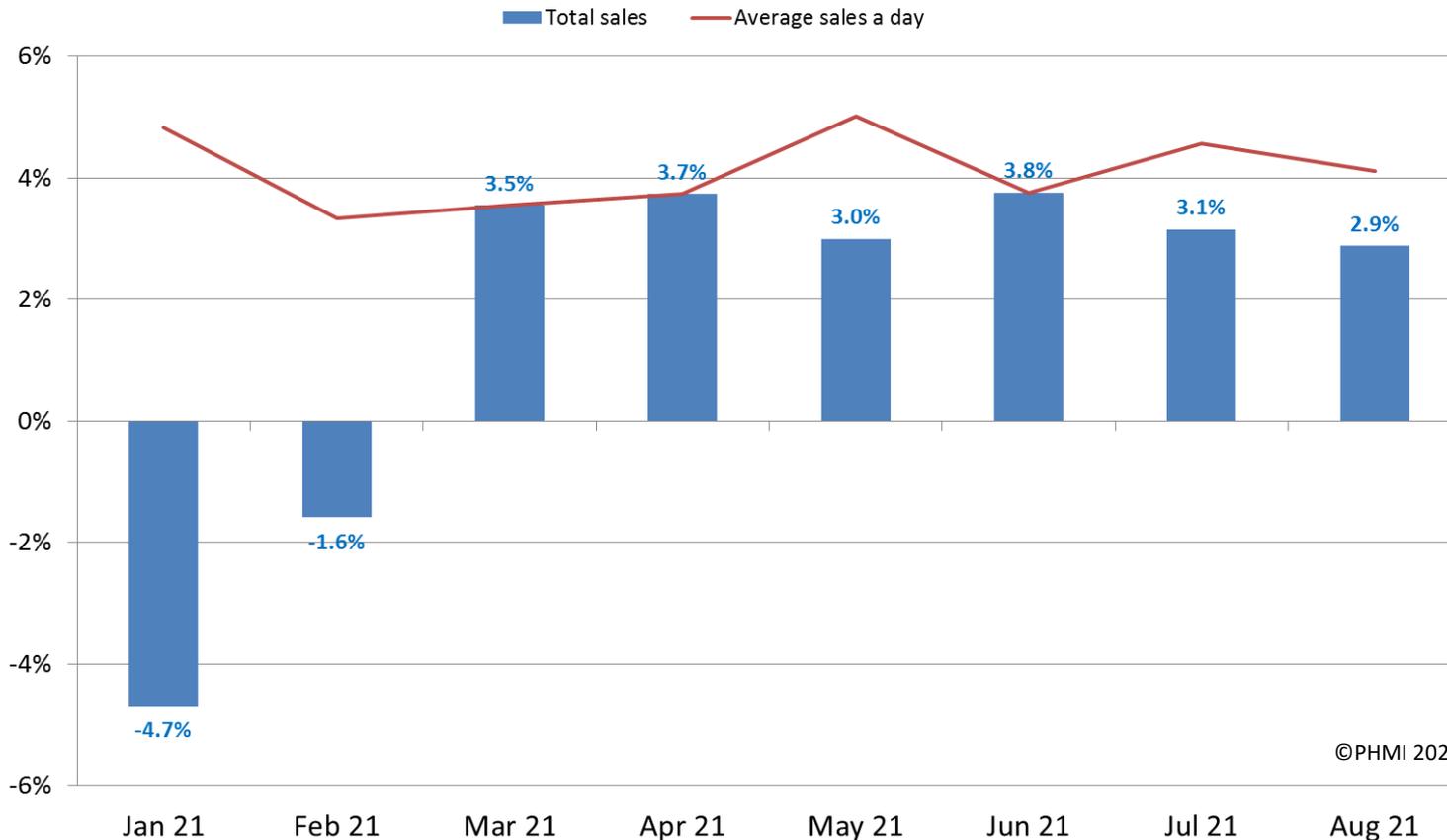
Year To Date: 2021 v 2019

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

Plumbing & Heating Merchant Index



Cumulative year to date: 2-year comparison



Value figures shown for Total sales

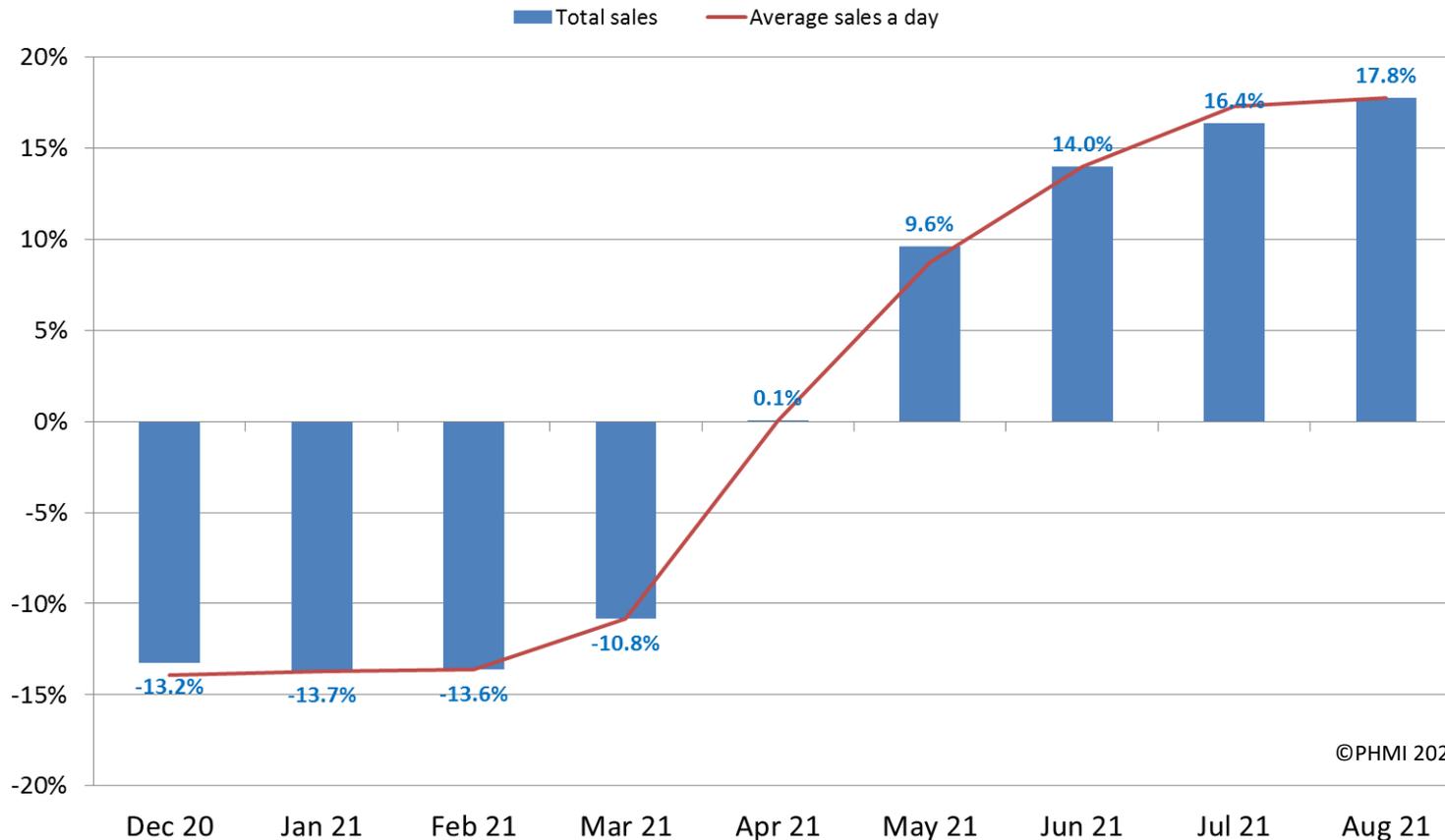
©PHMI 2021

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

©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.

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

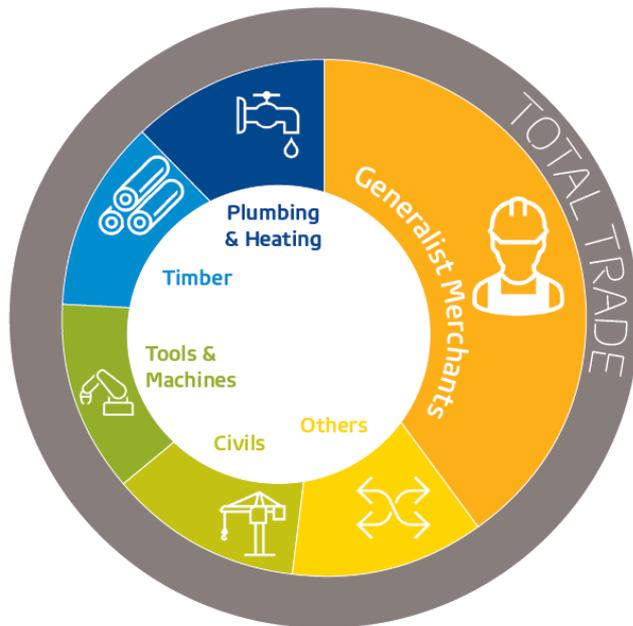
2020	
H1	H2
125	125
2021	
H1	H2
124	

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 Toby Aitken or Ralph Sutcliffe:



Toby Aitken

Account Director

toby@mra-marketing.com

+44(0) 1453 521621



Ralph Sutcliffe

Business Development
Director

ralph@mra-marketing.com

+44 (0) 1453 521621

More data available

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Emile van der Ryst

Senior Client Insight Manager -
Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615

Contact us

For further information



Neil Frackiewicz

Head of Retail UK

Neil.frackiewicz@gfk.com

+44 (0) 20 7890 9123



Emile van der Ryst

Senior Client Insight Manager - Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615



Sarup Ubhi

Industry analyst / economist

sarup.ubhi@bmf.org.uk

+44 (0) 24 7685 4994



Toby Aiken

Account Director

toby@mra-marketing.com

+44(0) 7989 557643



Ralph Sutcliffe

Business Development Director

ralph@mra-marketing.com

+44 (0) 1453 521621