

“building **excellence**
in materials supply”

Including
**Plumbing & Heating
Merchant Index**
See page 73

Builders Merchant Building Index



Quarter 3 2021

(Published 23 November 2021)

Building the Industry & Building Brands from Knowledge



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Introduction:

Builders Merchant Building Index



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: Bostik UK, 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 22 to 36 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.

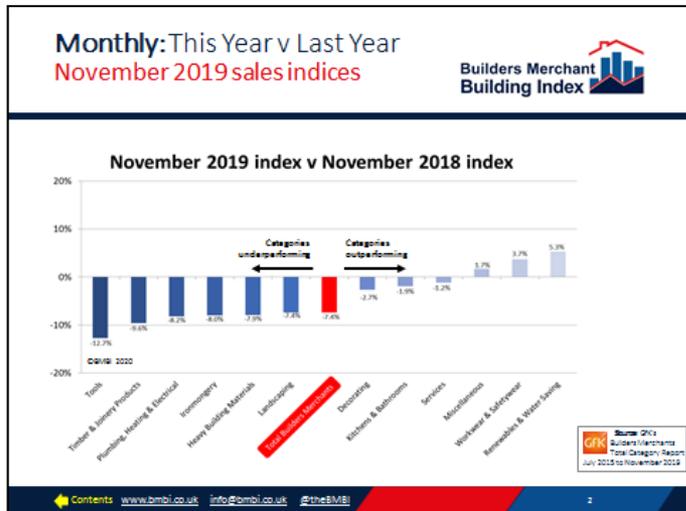
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

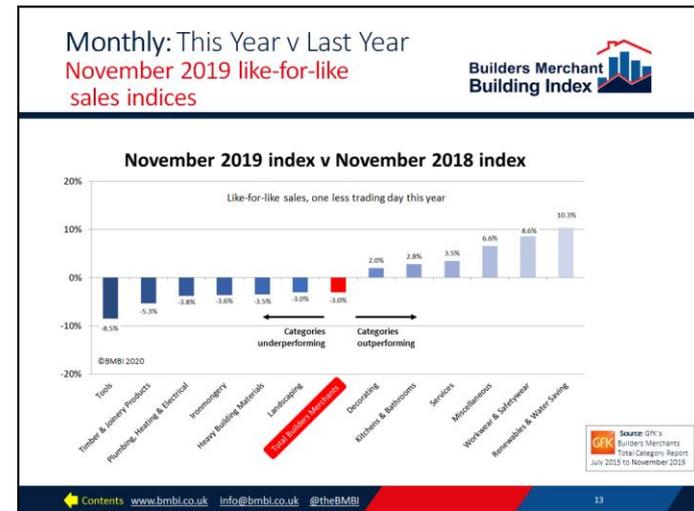
Direct comparison of sales indices:



The first of the two charts directly compares revenue in the two periods, regardless of the number of trading days. Total Builders Merchants sales (the red column) were 7.4% lower.

Average sales a day indices comparison:

(Expressed on charts as 'Like-for-like sales indices')



In the second chart, revenue has been divided by the number of trading days. In this example, revenue in November 2019 has been divided by 21 days, revenue November 2018 by 22 days and the results compared, showing a 3.0% fall in Total Builders Merchants sales activity (the red column) stripped of trading day differences.

The charts provide two valid views of the same data. Direct comparisons (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.

Overview and Insights

Emile van der Ryst,

Senior Client Insight Manager - Trade, GfK



Q3 2021 is second best quarter on record

The most recent quarter has seen a continuation of the strong growth experienced throughout 2021, but the sector is now starting to see the first signs of easing. This year has been just as unexpected as 2020 for merchants, albeit for more positive reasons. While Q3 wasn't another record quarter, it was only -2.4% behind Q2 in absolute value and was the second-best quarter on record. Volume growth has come to a standstill in Q3, with most value growth now being driven by price increases.

Year-to-date the sector is up by 36.2% in value, with this noticeably ahead of some of the growth forecasts made at the beginning of the year. Against 2019, which is a more accurate benchmark, year-to-date growth is up by 15.1%. Further evidence of continued growth is that the year-to-date growth against 2019 at the end of Q2 was sitting at 13.5%, which is lower than the abovementioned 15.1% by the end of Q3.

Going into the drivers behind the growth, the Builders Merchants sector is very much influenced by all the heavyside activity. Year-to-date Heavy Building Materials is up by 28.6% against 2020 and 7.9% against 2019. Using the same year-to-date metric both Timber & Joinery and Landscaping have continued their astounding growth. Timber & Joinery is up 61.4% against 2020 and 35.7% against 2019, while Landscaping is up 35.9% against 2020 and 37.9% against 2019.

In the previous quarter categories such as Blocks, Bricks, Insulation, Lintels, Sheet Materials and Timber were highlighted for their record performance and this has continued strongly. Blocks, Lintels, Sheet Materials and Timber have again had record quarters, with Bricks and Insulation not far behind Q2's record figures.

The final quarter of the year should see further sales easing, but still moving along very well. Supply chain issues are reducing, but wider UK market sentiment suggests this could persist until 2023. Pricing will most likely continue to drive any value growth. It's safe to say that the final year figures will be noticeably ahead of initial forecasts, but we expect that 2022 will see a decline against this most exceptional year.

“This year has been just as unexpected as 2020 for merchants, albeit for more positive reasons. While Q3 wasn't another record quarter, it was only 2.4% behind Q2 in absolute value and the second-best quarter on record.”

Merchants' View

John Newcomb, CEO BMF



Reports from the wider construction market are beginning to show the effect of ongoing supply chain issues, which this quarter have been further exacerbated by a shortage of HGV drivers and significant cost pressures on manufacturers. However, by working closely and collaboratively, the supply chain continues to manage these challenges.

Provisional figures from the Office of National Statistics (ONS) reveal a curate's egg of results for Q3 2021, with two months of falling output before volumes increased in September.

September saw monthly construction output grow in volume terms by 1.3%, with increases in both RMI (+1.2%) and new work (+1.3%). However, month on month declines in both July and August led to a 1.5% overall fall in Q3 2021 construction growth compared with Q2 2021. This is the first quarterly fall following four successive quarters of growth.

The ONS noted anecdotal evidence of supply chain issues affecting output, with reports of healthy order books but availability of certain construction products affecting projects currently underway.

Supply chain issues are also reported in the Federation of Master Builder's (FMB) Q3 State of Trade, which focuses on SME firms. This found 89% facing delays due to either material or skilled labour shortages. The vast majority, 97%, had experienced material price rises, with 93% expecting this situation to continue next year.

On a positive note, 55% of FMB respondents reported higher workloads in Q3 over Q2 2021 (with just 8% lower) and 56% reported more enquiries for future work (15% lower). This is only a slight dip on Q2 with enquiries returning towards pre-pandemic levels after an exceptionally strong period.

The latest NHBC figures are also positive. Headline results show 33,779 new homes registered in Q3 2023, an increase of 14% on the same period last year. There has also been a shift towards larger homes since the start of the pandemic, with detached properties representing 36% of new homes registered in Q3 2021, the highest proportion of registrations this quarter.

“Reports from the wider construction market are beginning to show the effect of ongoing supply chain issues, which this quarter have been further exacerbated by a shortage of HGV drivers and significant cost pressures on manufacturers.”

Quarterly: Index and Categories

Quarter 3 2019* to Quarter 3 2021

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Total Builders Merchants	100	123.4	105.4	104.9	76.4	124.6	111.1	120.7	149.7	146.1
Timber & Joinery Products	100	128.9	111.3	108.5	78.0	133.4	125.4	141.5	183.0	191.9
Heavy Building Materials	100	121.0	102.3	102.5	75.1	119.9	106.8	113.1	136.3	133.3
Decorating	100	115.7	104.7	101.1	56.3	108.5	99.5	101.1	112.2	112.9
Tools	100	98.5	92.2	86.0	41.0	94.4	90.7	99.6	103.0	97.6
Workwear & Safetywear	100	105.3	117.4	128.7	67.5	113.7	113.3	117.3	103.9	98.3
Ironmongery	100	126.1	113.6	112.9	65.0	123.2	112.6	119.3	133.8	126.2
Landscaping	100	141.3	91.2	100.1	138.8	175.5	112.1	141.5	237.5	184.0
Plumbing, Heating & Electrical	100	118.7	123.4	118.5	53.9	104.6	116.0	122.9	118.6	116.7
Renewables & Water Saving	100	75.3	65.8	76.6	31.5	66.4	62.6	70.3	77.2	71.2
Kitchens & Bathrooms	100	120.2	112.8	109.4	48.4	111.6	109.8	107.5	116.7	125.3
Miscellaneous	100	128.0	114.9	129.1	63.3	111.0	108.6	115.9	119.2	122.1
Services	100	121.8	110.3	104.8	72.8	115.9	107.3	110.4	127.9	132.1

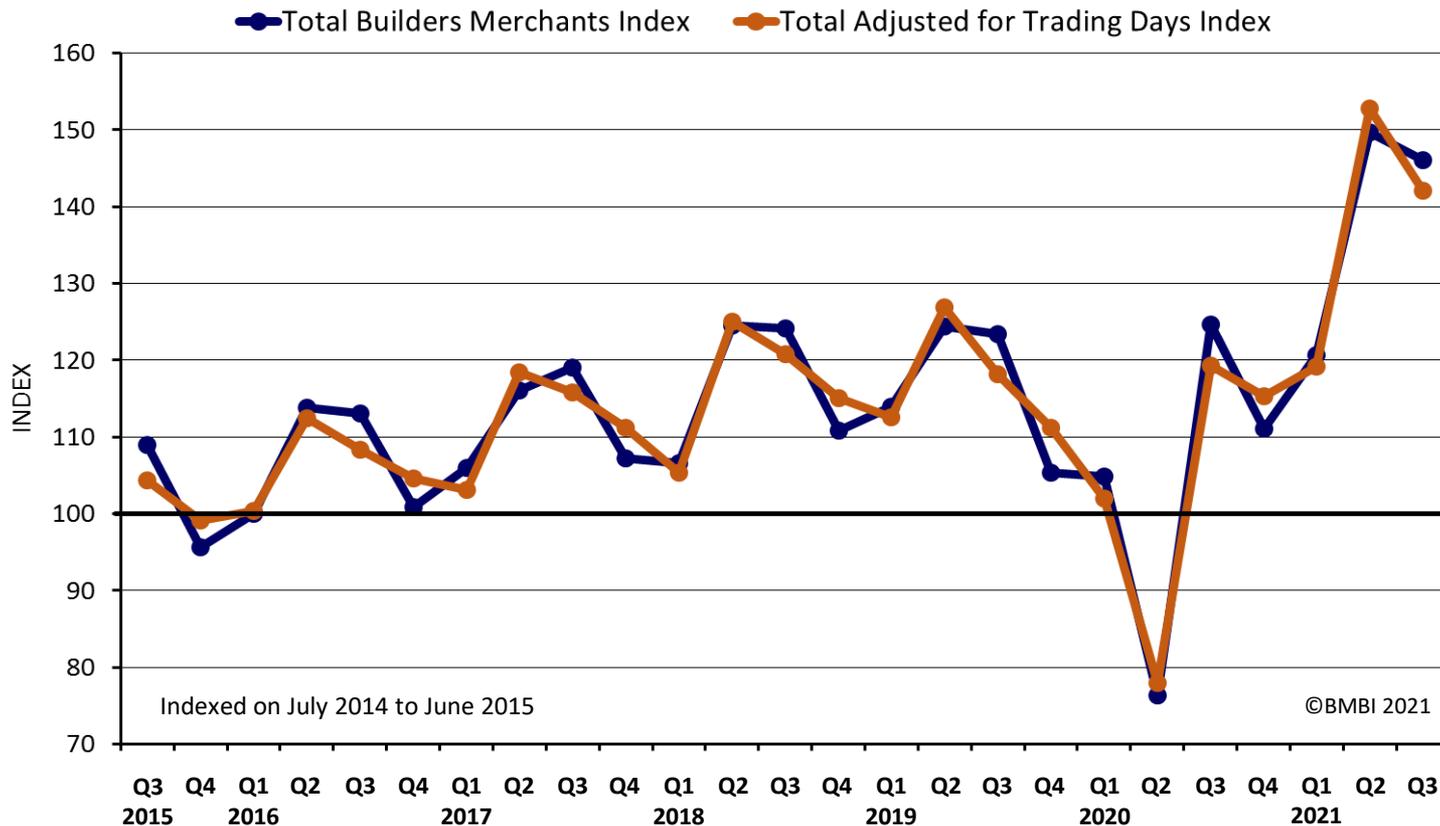
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

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

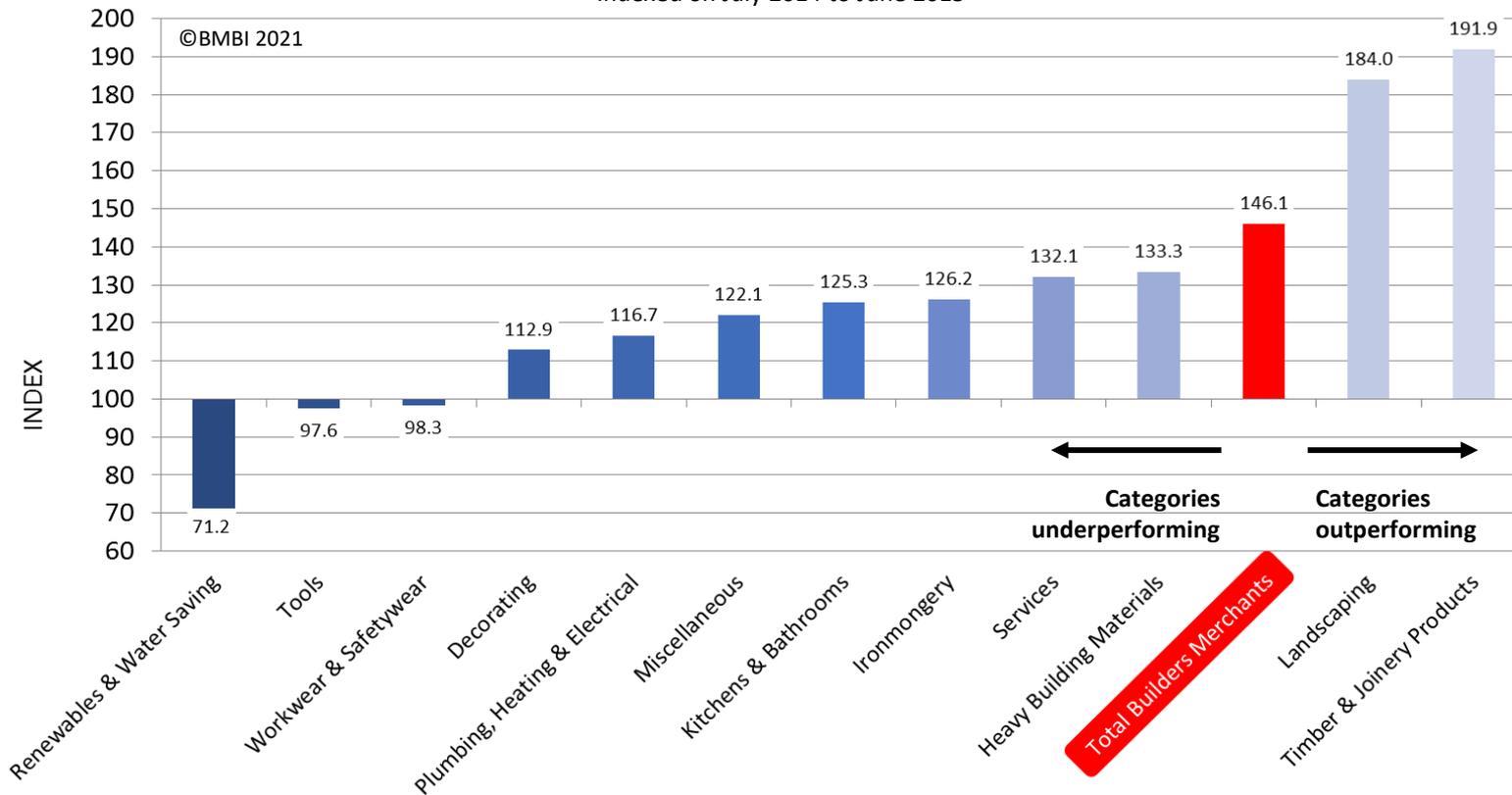
Quarterly: Index and Categories

Q3 2021 index



Quarter 3 2021

Indexed on July 2014 to June 2015



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

Quarterly: Index and Categories - 1

Quarterly indices



Quarterly Indices Q3 2015 to Q3 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
- Q3 2021



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

Quarterly: Index and Categories - 2

Quarterly indices



Quarterly Indices Q3 2015 to Q3 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
- Q3, 2021

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

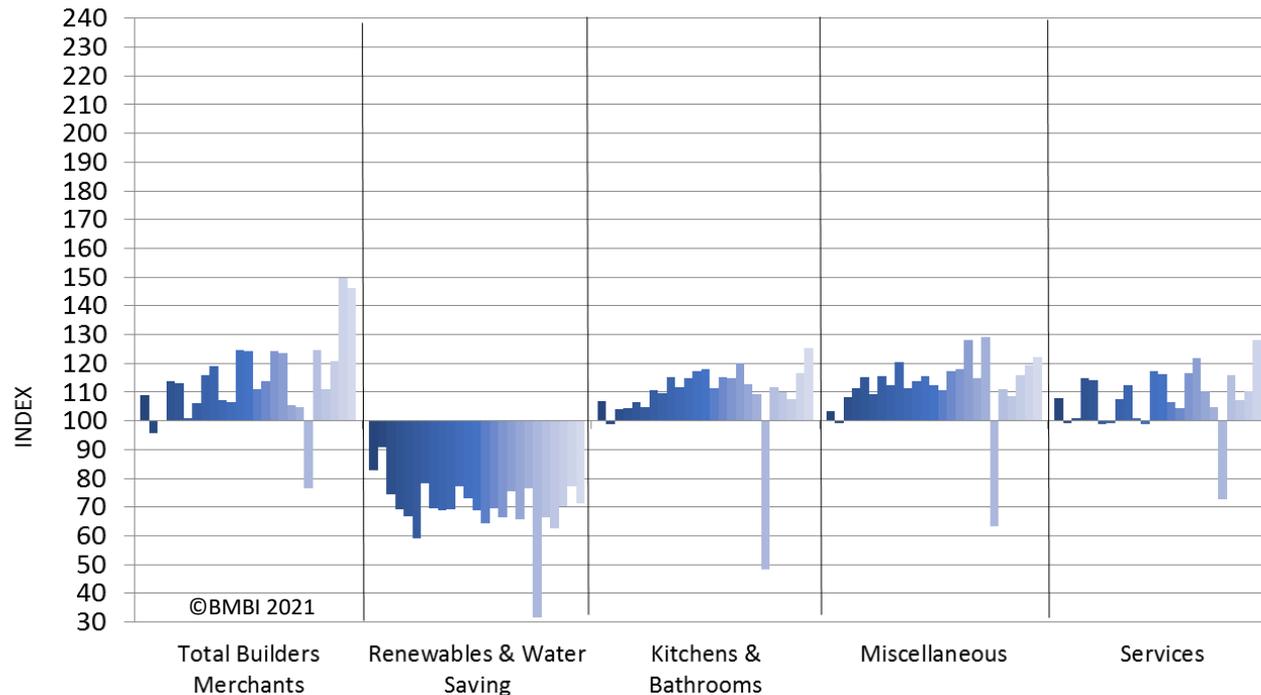
Quarterly: Index and Categories - 3

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
- Q3 2021

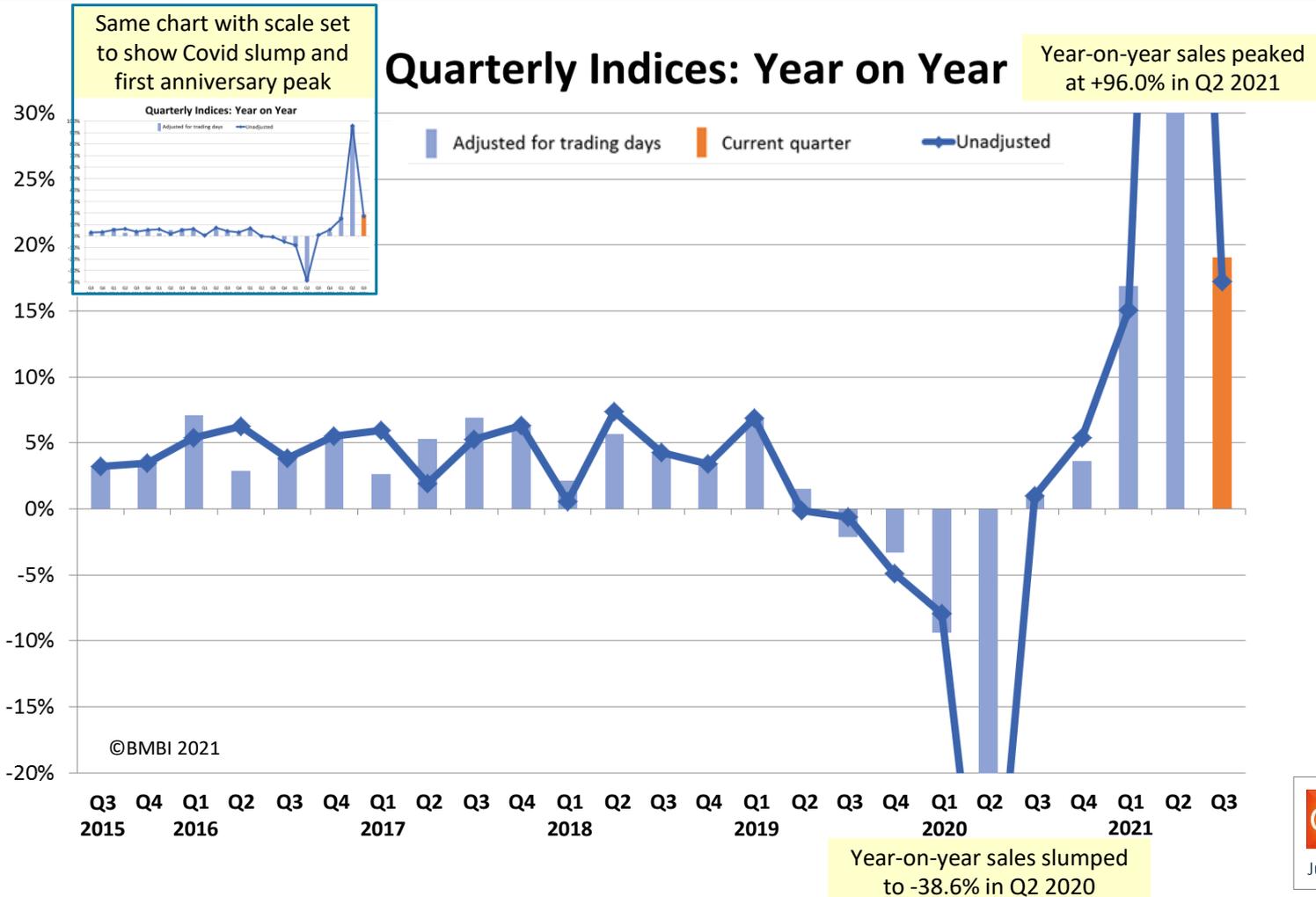
Quarterly Indices Q3 2015 to Q3 2021



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

Quarterly: Sales Indices

Adjusted and unadjusted for trading days



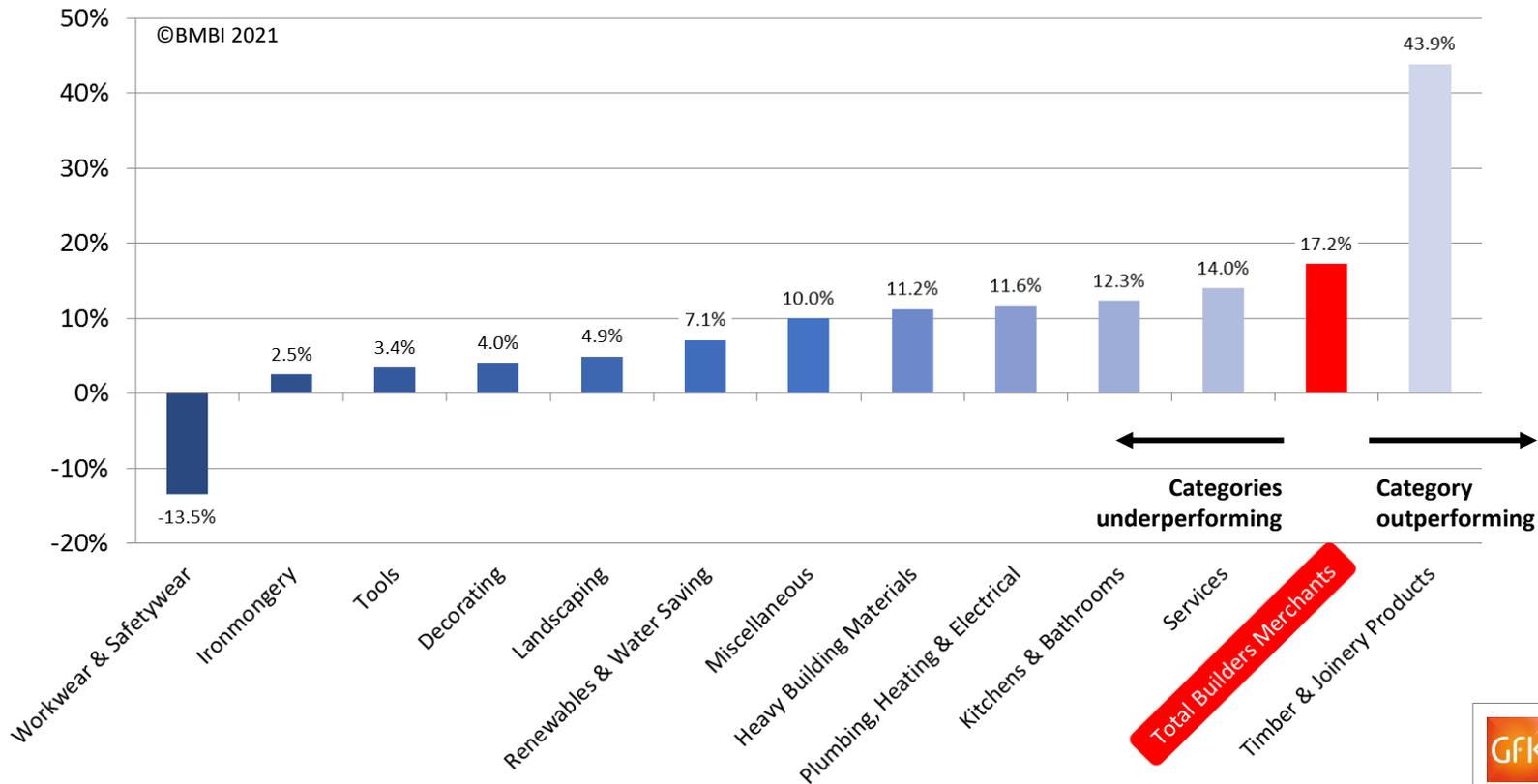
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

Quarterly: This Year v Last Year

Q3 2021 sales indices



Quarter 3 2021 index v Quarter 3 2020 index



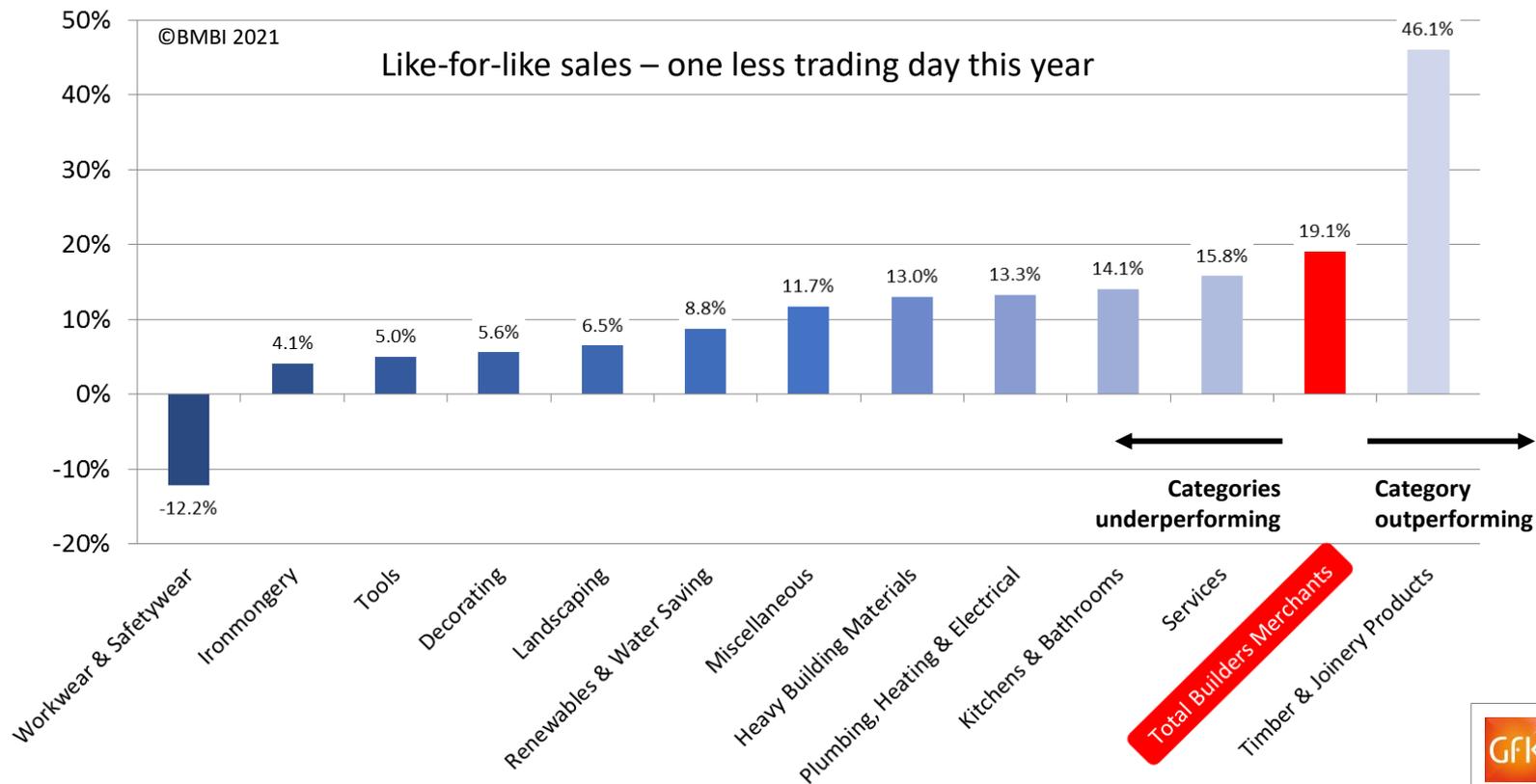
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Quarterly: This Year v Last Year

Q3 2021 like-for-like sales indices



Quarter 3 2021 index v Quarter 3 2020 index

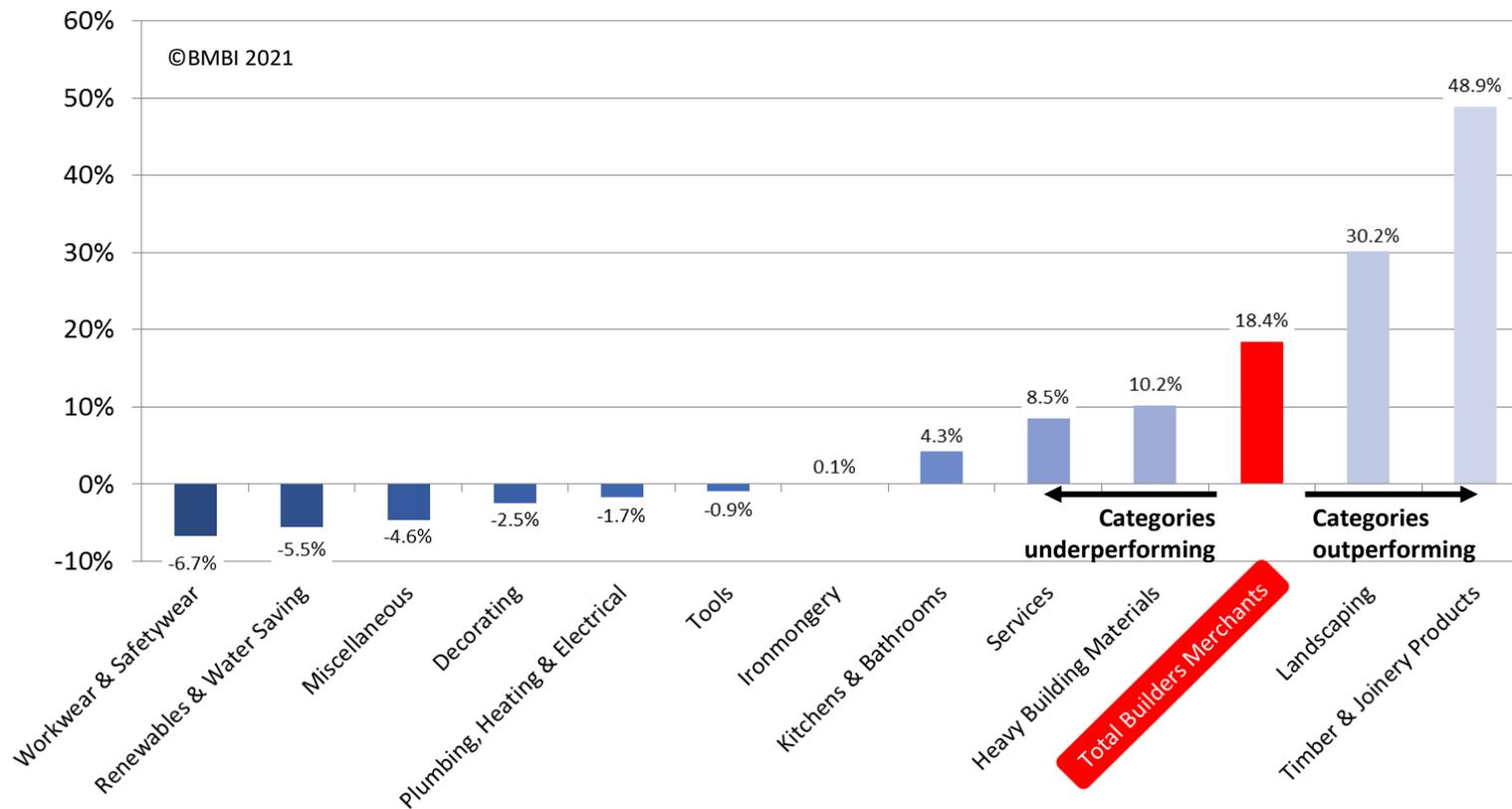


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Quarterly: This Year v 2019

Q3 2021 2-year sales indices

2-year comparison: Quarter 3 2021 v Quarter 3 2019

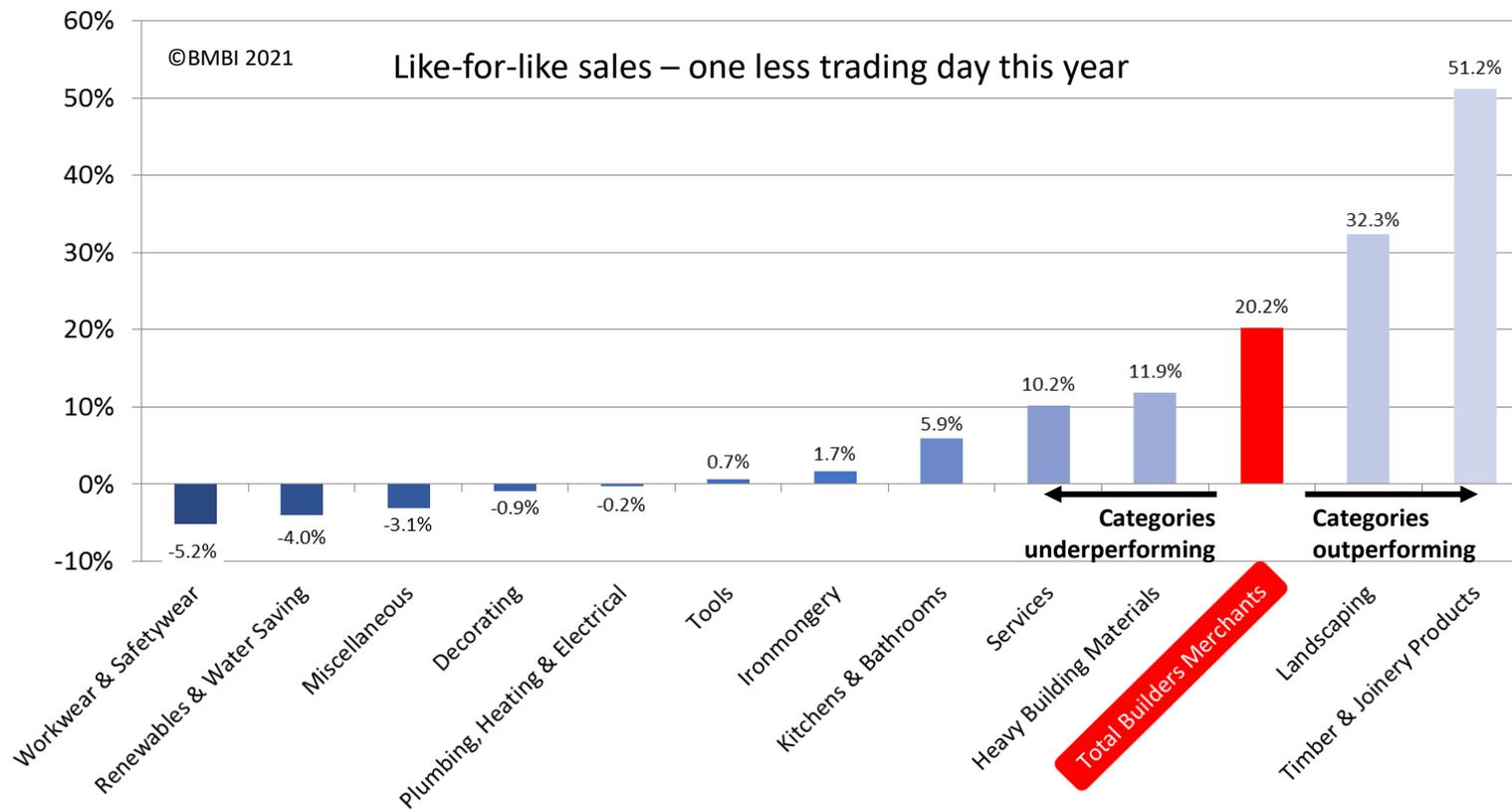


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Quarterly: This Year v 2019

Q3 2021 2-year like-for-like sales indices

2-year comparison: Quarter 3 2021 v Quarter 3 2019



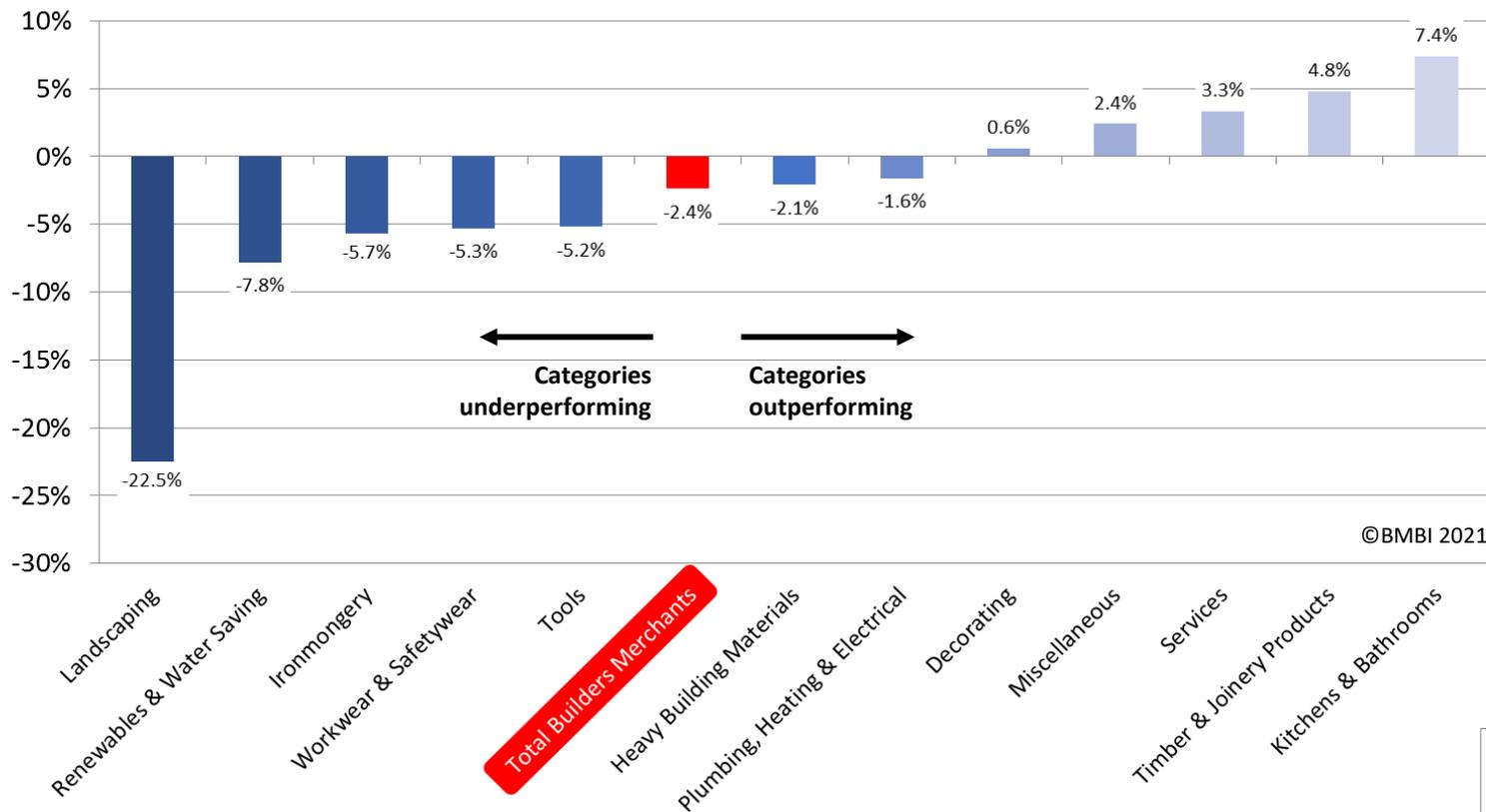
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Quarterly: Quarter on Quarter

Q3 2021 sales indices



Quarter 3 2021 index v Quarter 2 2021 index



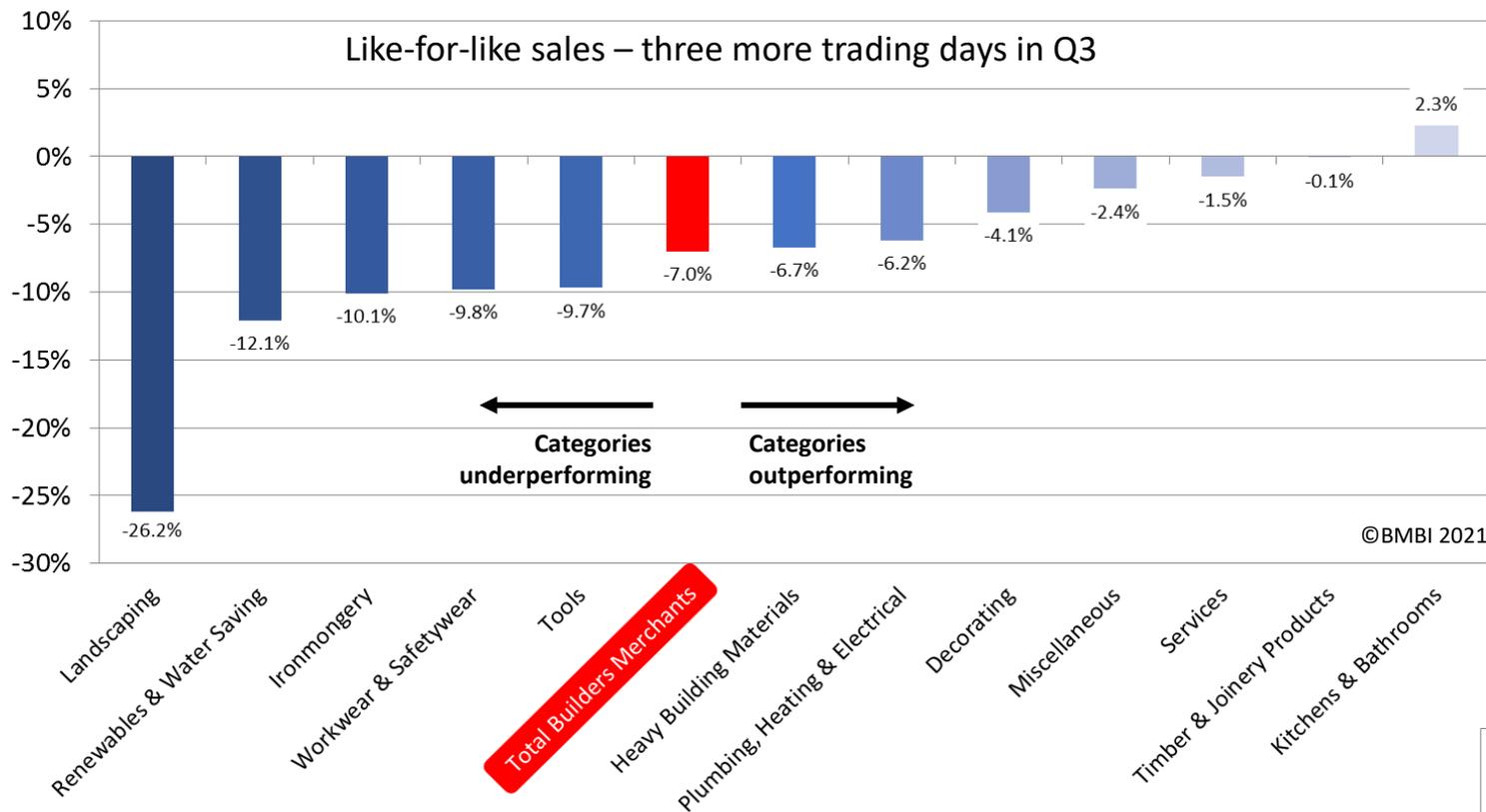
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

Quarterly: Quarter on Quarter

Q3 2021 like-for-like sales indices



Quarter 3 2021 index v Quarter 2 2021 index



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

Expert Panel

Wood-Based Panels

(Part of Timber & Joinery Products)



Simon Woods, European Sales Marketing & Logistics Director West Fraser (formerly known as Norbord) is BMBI's Expert for Wood-Based Panels.

While it's been another quarter of unprecedented growth for timber, don't expect demand to tail off anytime soon as this sustainable material can make a positive contribution to reducing the climate crisis.

With the COP26 discussions fresh in people's minds, it's a good time to reopen discussions on the UK construction industry's impact on the planet. Net zero is the target we are all striving for, but should we strive to go further?

Over time, construction moved away from timber as a primary construction material, but a return to wood would be very beneficial for the planet. There is a strong movement from many architects to increase their use of wood, something we would welcome.

Carbon is sequestered within wood as it grows and this stays locked up for the lifetime of a timber product. Wood can be recycled too, which keeps the sequestered carbon locked up for even longer. Our particleboard products, for example, contain high ratios of post-consumer recycled wood.

As the main component of our products, a majority of our wood is homegrown to minimise carbon emissions from transportation, as well as protecting our supply chain. Wood can be a carbon neutral building material, but why stop there? Norbords' wood panelboards are carbon negative, which means that we lock up more carbon in our products than we emit in the end-to-end production and distribution of them.

Attaining net carbon negativity is a significant step and demonstrates our determination to be a market leader in sustainable, climate-friendly products. This approach also helps us save 1.18 million tonnes of CO₂ per year.

Net carbon negative status benefits specifiers and users of our engineered wood panel products. When used in construction, these products can move a project's carbon count in the right direction, helping companies meet their net zero targets, which is good for reputation, compliance and the planet. For builders' merchants looking to do their bit, encouraging the use of wood-based products contributes to the movement towards sustainable building and to reducing the impact of the construction process on our increasingly fragile climate.

“While it's been another quarter of unprecedented growth for timber, don't expect demand to tail off anytime soon as this sustainable material can make a positive contribution to reducing the climate crisis.”

Expert Panel

Natural Stone & Porcelain Paving

(Part of Landscaping)



Krystal Williams, Managing Director Pavestone UK Ltd, is BMBI's Expert for Natural Stone & Porcelain Paving.

The market started to slow down in Q3, as we move past the unprecedented peaks in demand experienced in 2020 and early 2021. A combination of being able to travel and homeowners having other things to spend their savings on has pushed RMI down the priorities' list, and sales are back to a manageable level.

The sudden drop in demand has left many suppliers and merchants with surplus stock after months of buy, buy, buy. While the temptation is to shift excess stock, it's worth maintaining healthy levels on key lines as we expect strong demand in the Spring.

Whilst shipping prices have finally plateaued, and UK port congestion seems to be getting better, things have certainly not been 'fixed'. We're only seeing an improvement as demand has dropped. Should demand rise heavily again, we can expect much of the same with haulage shortages, port congestion and many shipping lines refusing to stop at some UK ports.

Porcelain sales have been another positive in Q3. Sales have grown despite sandstone and other alternatives being available. Merchants now have much more confidence to sell porcelain and we hope this will continue in the future.

Unfortunately, we're seeing a race to the bottom with porcelain having to compete with cheaper, lower quality products hitting the market. We've destocked our Indian-sourced porcelain as the shipping and haulage costs make it unviable to compete with better priced, European product.

There is a new colour trend on the horizon for Q4 and 2022: greige (grey beige). It's a soft grey, and a warmer contemporary product. We're seeing this hit European markets quite heavily and we expect it to have a big impact here.

Finally, in the aftermath of COP26, we expect a renewed focus on sustainability in Q4 and beyond, as the industry addresses how it can reduce its environmental impact and make a measurable difference.

“Whilst shipping prices have finally plateaued, and UK port congestion seems to be getting better, things have certainly not been ‘fixed’. We’re only seeing an improvement as demand has dropped.”

Expert Panel

Adhesives & Sealants

(Part of Decorating)



Mathew Whitehouse, Marketing Director at Bostik UK is BMBI's Expert for Adhesives and Sealants.

Demand for construction products is buoyant and overall production output remains strong, however the growing price of raw materials is creating a challenging economic picture. We've seen first-hand the impact on adhesive and sealant raw material feedstock prices, which have increased every quarter throughout 2021 due to a strong rebound across all markets where they are used including construction, automotive, electronics and personal care. Some key raw materials have reached historic highs, with prices increasing by more than 40% since August.

Approximately 60% of the global volume for some of these feedstocks is produced in China, where we are again witnessing increases, as plants reduce production capacity to meet regional Chinese government emission and energy control targets. China is the world's biggest producer of silicon and its price has increased by 300%, with no reduction expected for at least the next year.

In terms of regulatory changes, the plastic packaging tax takes effect from April 2022. The construction sector is one of the worst offenders consuming 23% of all UK plastic packaging and generating an estimated 50,000 tonnes of plastic packaging waste each year. It is our responsibility to lead a change in the industry by pushing suppliers for alternative materials and ways of packaging our goods.

The UK government's decision to delay the introduction of the UKCA mark by a year because of the pandemic is sensible. However, that doesn't mean we should take our foot off the pedal. It's essential we use this time to good effect by organising retesting and packaging updates to avoid any delays come 1st January 2023.

The Code for Construction Product Information (CCPI), developed by the CPA's Marketing Integrity Group, also continues to gather momentum. The CCPI sets a level playing field for all construction product manufacturers to ensure that the information they provide is clear, accurate, up-to-date, accessible and unambiguous.

The CCPI is likely to become a benchmark for any public sector work and may be more widely adopted by specifiers for private sector work, so we're keeping a close eye on the scheme's progress.

“Demand for construction products is buoyant and overall production output remains strong, however the growing price of raw materials is creating a challenging economic picture.”

Expert Panel

Bricks & Roof Tiles

(Part of Heavy Building Materials)



Kevin Tolson, Commercial Director Wienerberger UK is BMBI's Expert for Bricks & Roof Tiles.

As we enter the final few months of 2021, it is useful to reflect on the year so far, while also looking to the future of the industry and our business.

Many in our sector have performed beyond expectations and have bounced back well from last year, despite a variety of challenges. However, the construction industry is often a reliable indicator for wider economic performance, and we'll enter the fourth quarter with a note of caution.

According to the Purchasing Managers Index (PMI) of industry activity, post-lockdown growth in the construction sector fell to its slowest for eight months in September. This trend reflected in the high-street where retail sales dipped 0.2% in September. This was the fifth monthly fall in a row.

Business confidence is holding up according to ONS and CBI surveys, but consumer confidence, captured by GfK in its Consumer Confidence Index, was -17 in October 2021, down four points from -13 in September to its lowest level since February. These will be key areas to keep an eye on during 2022.

During the final quarter, Glasgow will have hosted the 2021 United Nations Climate Change Conference (COP26). As a company we've been a signatory to the UN Global Compact since 2003, which ensures that we're focused on driving action and support of achieving the Sustainable Development Goals by 2030.

We've strengthened this commitment and launched our 'Let's Build Beyond' sustainability strategy that ensures our organisation and stakeholders in the UK can see a path to a more sustainable future for construction as we head into 2022.

While we have been busy doing our bit for the planet, it's good to know that we are not alone. We are seeing many within construction starting to take positive steps in the right direction to becoming more sustainable. Over time, all of these small steps will get bigger, and they will no doubt combine to bring about significant momentum in our industry and for the environment.

“Many in our sector have performed beyond expectations and have bounced back well from last year, despite a variety of challenges. However...we'll enter the fourth quarter with a note of caution.”

Expert Panel

Civils & Green Infrastructure

(Part of Heavy Building Materials)



Steve Durdant-Hollamby, Managing Director Polypipe Civils is BMBI's Expert for Civils & Green Infrastructure.

To a large extent, the challenges faced in the previous quarter are the same in Q3 with material availability continuing to cause disruption across all sectors. In addition, we are now being subject to further commercial uncertainties as a result of significant energy price fluctuations, skills shortages and a far more mobile labour force.

Demand is high and it's forecast to stay that way, although with the usual seasonal variations around the end of the year. Yet the ever-present threat of reimposed COVID restrictions also hangs over us. Our industry finds itself in exceptional times.

It is said that 'necessity is the mother of invention'. With the challenges our industry faces, there has never been a better opportunity to embrace change and to look for new solutions and new ways of working.

The need for a new approach is not just in relation to the current supply issues. It's also true in response to climate change and our pledge to achieve Net-Zero. COP26 presented us with a stark picture of what needs to be done to limit the global temperature rise to 1.5 degrees.

The wider acceptance of recycled materials is one area where our industry could look to effect a positive change on the environment. Opening or creating new standards allows the use of breakthrough technologies which deliver wider, long-term benefits to support a true circular economy.

Staying with the theme of climate goals, we were pleased to see the Government's Environment Act finally achieve Royal Assent on 9th November, two years after its introduction. Setting out the Government's overarching vision for leaving nature in a better state for future generations, the Act is seen as a milestone in shaping ambitious resilience and ecological policy.

The Act's requirements for developments to achieve a net-gain uplift in biodiversity will transform our urban landscape and deliver a wealth of multi-functional benefits for communities and the environment. Further legally binding targets to improve nature, air and water quality will be introduced next year.

“COP26 presented us with a stark picture of what needs to be done to limit the global temperature rise to 1.5 degrees. The wider acceptance of recycled materials is one area where our industry could look to effect a positive change on the environment.”

Expert Panel

Steel Lintels

(Part of Heavy Building Materials)



Derrick McFarland, Managing Director Keystone Lintels is BMBI's Expert for Steel Lintels.

Demand for steel lintels has remained strong, but as a result of escalating material and labour costs, we saw the price shoot up at the beginning of Q3. This would normally result in high volumes sold, however, for the first time I know of in my career, we had to put steel lintels on allocation to help manage the restricted supply of raw material. Allocations were calculated based on the average purchased in the six months from 2019, and by branch.

Despite these restrictions, we have so far been able to deliver 2.5% more tonnes of steel lintels in 2021 compared to 2019, so supplies are still getting through. It is fair to say that orders did not always arrive fully shipped and on time, however our teams behind the scenes have been working tirelessly to satisfy customer demands as best they can in the current conditions.

That said, we are part of a global supply chain and there are still serious challenges. The new barrier to normality is the pending energy crisis, with some factories in China reportedly working two days on and two days off to share the country's energy resources. It is inevitable this will affect the global steel market, particularly in terms of availability and future pricing.

The NHBC is reporting completions in Q3 2021 compared to 2020 are down 5% (1692 units), reflecting the combination of last year's post-lockdown recovery compared to the material challenges of 2021. On a more positive note, NHBC reports that 36% of new homes registered are detached, which is up from 28% on the same period last year, while apartments registered in Q3 2021 fell from 29% to 13%. With detached houses on the increase, coupled with new building regulations, demand for high thermal performing lintels is also set to rise.

Looking ahead, we believe the industry will see a reduction in raw material shortages and supplies becoming more stable in Q4, which will in turn slowly improve overall service levels for steel lintel customers.

“Demand for steel lintels has remained strong, but as a result of escalating material and labour costs, we saw the price shoot up at the beginning of Q3. For the first time I know of in my career, we had to put steel lintels on allocation...”

Expert Panel

Drylining Systems

(Part of Heavy Building Materials)



Stacey Temprell, Marketing Director British Gypsum is BMBI's Expert for Drylining Systems.

During Q3, we continued to see the ongoing challenge of high prices and low availability of materials, with fuel shortages and some very wet weather thrown in for good measure.

Like others in our industry, we found that these factors affected production output in different ways, presenting a mixed picture across the board. The commercial and non-housing repair sectors continue to struggle, while production output for infrastructure and private housing repair is significantly above levels recorded in February 2020.

However overall the ONS reports a cautiously positive outlook on the economy. Although still below pre-pandemic levels, UK GDP is continuing to rise slowly while the falling unemployment rate indicates further signs of recovery.

With the huge number of job vacancies on offer as the economy adjusts post-Covid, average weekly earnings have increased to attract and retain staff in a competitive labour market. Wages have risen by 9.7% in construction, but economists warn that eventually these costs may well find their way home to the consumer's pocket.

Q3 also saw the publication of the Code for Construction Product Information. Developed in the wake of the Grenfell Tower disaster, in direct response to Dame Judith Hackitt's independent review, the CCPI promotes the need for urgent and positive industry change.

At British Gypsum, we share the Construction Products Association's goal to drive higher standards in the presentation of product information, and we are committed to raising the bar across our industry.

As dedicated supporters of the CCPI, we are committed to providing our customers and construction partners with a 'golden thread' of information to support them with complete transparency and do our part in building better. Since the first publication of our own White Book in 1972, we have been leading the way in providing clear and accurate product, system and specification information that can be relied upon, doing our part in raising industry standards further.

“With the huge number of job vacancies on offer as the economy adjusts post-Covid, average weekly earnings have increased to attract and retain staff in a competitive labour market. Wages have risen by 9.7% in construction...”

Expert Panel

Mineral Wool Insulation

(Part of Heavy Building Materials)



Neil Hargreaves, Managing Director Knauf Insulation is BMBI's Expert for Mineral Wool Insulation.

Amid the uncertainty of last March, most of us would have pounced on any positive sign that construction was bouncing back. After a 2021 dominated by supply challenges caused in large part by insatiable demand, we're reminded of the risks of "too much of a good thing".

Merchants don't need me to spell out the difficulties they've faced in sourcing construction materials of almost every type – insulation included. And not just imported products, but those made here in the UK too. Nor do they need another lengthy explanation of the causes. Take one part voracious demand (witness this year's BMBI data), add a post-lockdown backlog and a touch of logistics disruption, and you've got a recipe for trouble. In this case, a just-in-time supply chain knocked out of tune.

As I said last quarter, merchants and their partners are having to use equal measures of collaboration, creativity and patience to navigate this challenging time. But what about the mid to long-term picture? Because unfortunately, all indications suggest merchants will face disruption for some time to come (the Construction Products Association has revised its growth forecasts for 2022 down from 6.3% to 4.8% in anticipation).

There are two issues to be solved; distribution and demand. The former requires carefully untangling and rebuilding supply chains. It will take time, but the logistics industry will eventually adapt. For the latter, manufacturers will need to increase supply.

At Knauf Insulation, for example, we've brought new capacity onstream globally, and we're planning investments here in the UK that will deliver in the longer term too. That's important because the demand for Mineral Wool insulation is only likely to increase. This winter's energy price crisis has sharpened the appetite for buildings that are energy efficient to run, while COP26 reminds us that we mustn't forget embodied carbon either.

When construction emerges from its current demand shock – and eventually it will – there will remain a strong, underlying demand for Mineral Wool because it can deliver genuinely sustainable buildings. And that's one good thing we can't have too much of.

“This winter’s energy price crisis has sharpened the appetite for buildings that are energy efficient to run, while COP26 reminds us that we mustn’t forget embodied carbon either.”

Expert Panel

Cement & Aggregates

(Part of Heavy Building Materials)



Andrew Simpson, Packed Products Director Hanson Cement is BMBI's Expert for Cement & Aggregates.

Q3 saw a shift in the trends for 2021, as typical seasonal trading patterns began to return. According to the Mineral Products Association (MPA), construction demand for mineral products slowed in Q3, with ready-mixed concrete down 6.7% compared to Q2 while asphalt (-4.3%) and mortar sales (-3.7%) were also down. But while retail demand for DIY has eased, trade business continues to drive merchant sales for cement and aggregates, and construction is strong.

As part of an energy intensive industry, we're one of many businesses lobbying for government help with skyrocketing energy prices. Energy costs doubled in Q3, and we expect them to stay high throughout Q4 and into 2022.

We're also experiencing cost pressures caused by pallet, packaging and raw material shortages, and haulage difficulties, particularly for packed products. Increases in the cost of carbon is placing manufacturers under significant pressure, to the extent that manufacturers may need to pause production. The price of carbon is now much higher than we had forecast, with a peak of £75 a tonne.

In the next five years, construction can expect to see changes in cement types as the industry drives to cut carbon. To avoid escalating carbon credit costs and volatile energy prices, we are investing in measures to reduce energy usage and emissions. Currently Hanson is investing in two pilot schemes: a carbon capture and storage (CCS) scheme for our Padeswood cement plant, and we have trialled using a net zero fuel mix including hydrogen at a kiln in Ribblesdale. Together, in the future, these could reduce emissions by almost 1m tonnes of carbon a year.

But schemes like this are at the cutting edge of innovation and the infrastructure required for them to be adopted at scale doesn't yet exist. To implement CCS at our three sites would require hundreds of millions of pounds investment. At Hanson, we've reduced our CO₂ emissions by 50% since 1990, and further investment is planned to reduce them even further.

With supply problems and price pressures coming at us from all angles, it looks like a bumpy ride in 2022. Most companies are at capacity and cannot make more, and without a magic wand, we'd just ask for calm and understanding in the short term as the industry struggles to meet demand.

“Increases in the cost of carbon is placing manufacturers under significant pressure, to the extent that manufacturers may need to pause production. The price of carbon is now much higher than we had forecast, with a peak of £75 a tonne.”

Expert Panel

Lead

(Part of Heavy Building Materials)



Lynn Street, Sales & Marketing Manager Midland Lead is BMBI's Expert for Lead.

The lead industry, like others, is affected by short-term issues such as Brexit and the driver shortage. We believe it will take a while for it to settle back to normal levels. Hefty price rises for energy, raw materials and packaging are hitting the industry, and shortages in the supply chain are affecting buying habits.

But it's sustainability which is rightly at the top of the industry agenda. Attending a BMF Parliamentary Reception to support the CO2nstructZero Campaign and Sustainable Construction a few weeks before the COP26 summit in Glasgow we saw the industry's appetite to reduce its negative impact on the environment.

The event was well attended by builders' merchants, industry leaders and politicians. However it's clear that legislation is needed to force construction to work towards the target of all buildings becoming net zero before 2050.

Builders' merchants and other construction materials suppliers source and provide to meet demand, and the cost to the end user will always be a priority until legislation dictates otherwise.

As a sustainable material, lead is at the forefront of building materials because, by its very nature, it's the most sustainable roofing product available. Lead alternatives cannot be recycled or reused indefinitely like lead. But it's up to manufacturers to get in front of specifiers and buyers to demonstrate what is needed to reduce the negative impact that construction has on the environment.

Midland Lead is the first lead manufacturer to be awarded an EPD for its cast sheet lead. An EPD, or Environmental Product Declaration, transparently communicates the environmental performance or impact of a product or material over its lifetime. We worked hard to achieve this, but does it influence purchasers' decision to use real lead? The answer is still yes and no, but construction is becoming more aware of its impact on the environment.

Legislation needs to change significantly to help create a truly sustainable future. So, keep your eye on that and be aware of your business' environmental impact because change is on its way.

“Hefty price rises for energy, raw materials and packaging are hitting the industry, and shortages in the supply chain are affecting buying habits.”

Expert Panel

PVC-U Windows & Doors

(Part of Timber & Joinery Products)



No.1 for choice • No.1 for colour



Kevin Morgan, Group Commercial Director The Crystal Group is BMBI's Expert for PVC-U Windows & Doors.

2021 is turning out to be a game of two halves, as a buoyant Q1 and Q2 have made way for a tail off in demand in Q3 and perhaps – finally – a return to normality.

Normal service has resumed for raw material and component supplies, with resin, PVC-U profiles, and glass all readily available. We aren't entirely out of the woods on supply issues, but we seem to be over the worst of it.

The availability of materials in Q3 has moderated the stream of price rises we saw earlier in the year. We expect to see an end to additional surcharges by the end of the year too.

Digital sales were the driving force behind half of our own Q3 sales, and as many merchants will agree, a mix of clicks and bricks is necessary to stay competitive in the building industry. Hence our rollout of Crystal Window Centres for the merchants is gathering pace.

As we move into Q4, and COP26 discussions draw to a close, sustainability is top of the agenda. We're confident there will be another incarnation of the green homes scheme in 2022 under a different name, and a push for windows to be classed as primary measures. While the government is championing subsidies for costly air source heat pumps, it makes sense to ensure homes are well-insulated, so they don't waste energy.

As well as thermal efficiency, we are seeing increased interest in noise abatement windows. Many new housing estates are being built on brownfield sites near roads or rail lines, and developers need windows which keep the noise out. They will also need to be retrofitted to homes affected by the HS2 project.

The big watch point going forward will be cash flow, as the industry recalibrates to new levels of demand and a backlog of orders. A lot of money is being spent on buying materials and components, but with lead times extended to 8-9 week or more before jobs are completed, suppliers, fabricators and installers could struggle before the money comes in.

“Normal service has resumed for raw material and component supplies, with resin, PVC-U profiles, and glass all readily available. We aren't entirely out of the woods on supply issues, but we seem to be over the worst of it.”

Expert Panel

Paint

(Part of Decorating)



Paul Roughan, Trade Merchants Sales Director Dulux Trade is BMBI's Expert for Paint.

It has been another difficult quarter, as the industry grapples with labour and materials supply issues. Job vacancies are at a record high and supply chain problems facing the UK have led to a fall in construction output for four consecutive months. This is likely to have an impact downstream on the trade paint market as these are problematic for our major customers.

Early in Q3, demand stayed strong within the trade as total market volume for August 2021 was only slightly down (-4%) compared to the same month last year. On a moving annual totals (MAT) basis though, volumes were up 14% year-on-year and we were still 4.6% to the good versus the MAT volume for August 2019 – a more normal pre-Covid period.

However, change is in the air. According to figures from the British Coatings Federation, trade paint sales in September were down 15% against September sales last year, following what they called 'lacklustre' performances in each of the previous three months.

The downward trend was replicated in the decorative paint market, where September was down 26% year-on-year, following a run of falls since May this year as consumer confidence faltered and the property boom from earlier in the year started to fizzle out.

Despite the gloom, year-to-date trade paint sales for 2021 are still up by more than 8% compared to last year. Is it a big ask to maintain this as we move into Q4? Maybe, maybe not. The CPA expects construction growth to stay strong for the rest of the year, so much will depend on the industry's ability to overcome the frustrations of supply shortages, bottlenecks at ports and mounting cost pressures.

There is one area of potential growth that merchants should be aware of as we head towards the end of the year, and that is the number of generalist or multiskilled tradespeople who are now applying paint. Their numbers are growing, yet a majority aren't buying their paint from builders' merchants. They are buying elsewhere. Why? If you can answer that, there's a lucrative new revenue stream waiting for merchants to pick up.

“According to figures from the British Coatings Federation, trade paint sales in September were down 15% against September sales last year, following what they called 'lacklustre' performances in each of the previous three months.”

Expert Panel

Roof Windows

(Part of Timber & Joinery Products)



Jim Blanthorne Managing Director of Keylite Roof Windows is BMBI's Expert for Roof Windows.

The last quarter brought more of the same for roof windows; more demand, more material challenges and more cost increases.

The cost of containers from the Far East shows no sign of normalising. Perhaps the current rates are the new normal, however we assume competitive forces will return once global supply chains find an equilibrium. Most commentators have given up predicting when this will be, but it won't be before Chinese New Year.

At our manufacturing and distribution locations, statutory changes and market forces are resulting in wage costs continuing to rise above the rate of inflation.

Timber prices have softened, yet availability remains a challenge on certain specifications. Aluminium and PVC prices are up significantly. All in all, a shortage of good news stories when it comes to supply and cost.

Speaking for Keylite, we have taken every possible measure to shelter customers from price increases, holding the modest increase announced in January 2021 through to year end without passing on any of the exceptional cost inflation.

At the end of September, we duly announced our 2022 price increase, which will take effect 1st January. Again, we have mitigated cost increases as far as possible, keeping the increase for roof windows to single digits.

At Keylite, our strategy throughout 2021 has been to invest in stock and position ourselves to grow the category with the market, resulting in record sales volumes. Demand has come from both existing customers, which we planned for, and an increase in their wallet share due to the supply issues encountered by some competitors, which we hadn't. The extraordinary demand we have seen in recent weeks means we will be communicating an allocation system for Q4 to ensure our growing output is apportioned fairly.

We will continue to invest in both stock and manufacturing capacity to support our customers in advance of what we expect to be a strong Q4 and into 2022.

“Timber prices have softened, yet availability remains a challenge on certain specifications. Aluminium and PVC prices are up significantly.”

Expert Panel

Shower Enclosures & Showering

(Part of Kitchens & Bathrooms)



Mick Evans, Operations Director Lakes is BMBI's Expert for Shower Enclosures & Showering.

In Q3 we have seen sustained slow growth in our sector, but the stage is set for a bigger finish to the year. All the indications are that consumer spending on home improvements will continue for the rest of the year and into 2022, as colder weather brings with it increased interest in indoor projects.

The value of bathroom projects is going up too. The average bathroom renovation spend was £5,000 in 2020, up a quarter on 2019, according to a [consumer survey](#) by Houzz – the home improvement platform. Its research revealed that more than half of homeowners were planning renovations this year.

While we expect 2021 to finish with a flourish, not everything in the industry is positive. [Research](#) suggests that one in eight firms fear they will fail within a year as the cost of COVID compliance and surging materials prices squeezes margins, and a [shortage of skilled workers](#) is threatening to derail the industry's recovery as customers wait months for new bathrooms to be installed.

The British Institute of Kitchen, Bedroom & Bathroom Installation (BiKBBI) is calling for a co-ordinated effort from Government and industry to plug the skills gap but there are no quick wins to fix the problem. Bringing new people and new ideas into the industry is essential to future growth, something aptly demonstrated by the increase in bathroom companies utilising digital channels to improve operations and customer satisfaction.

We have reached a turning point. The pandemic pushed us to embrace digital, and companies who did - by introducing services like online booking, electronic payments and other omnichannel options - are thriving. Even if a customer only does their initial product research online, if you aren't online, you aren't part of the conversation. It's as simple as that.

Can anything spoil the bathroom industry party as we move into Q4 and 2022? Supply chain issues, rising prices, port congestion and the haulage driver shortage will continue, but overall we are cautiously optimistic.

“A shortage of skilled workers is threatening to derail the industry's recovery as customers wait months for new bathrooms to be installed. Bringing new people and new ideas into the industry is essential to future growth...”

Expert Panel

Website & Product Data Management Solutions



Andy Scothern, Managing Director eCommonSense is BMBI's Expert for Website & Product Data Management Solutions.

Climate change is the biggest single threat facing the planet, and everyone needs to act if the predicted crisis is to be avoided. With COP26 having recently taken place along with a series of damning reports criticising attempts to reduce CO2 emissions, will 2022 be a year for change?

The Government is realising the detrimental impact of the built environment sector on the nation's net-zero ambition. Construction has a crucial role to play in driving a more sustainable future but action needs to be taken before it's too late.

At the recent BMF parliamentary reception, 'Building a Sustainable Britain', an event designed to showcase sustainability in the manufacturing and distribution of building materials and home improvement products, it was encouraging to speak to builders' merchants and building materials manufacturers about the urgent actions that need to be taken.

Solving inefficiencies in the supply chain should be a significant focus, with the rise of eCommerce presenting new opportunities in efficiency. The entire industry needs to go through a digital transformation, part of which will involve connecting the websites, product databases and back-office systems of merchants, suppliers and, further downstream, construction companies. This will enable rapid and accurate data exchange to allow customers to make informed buying decisions, and help improve inventory and delivery management, but it will also reduce waste from the number of part-full delivery trucks on the road.

Many merchants have invested limited amounts of money in digital transformation, as they are unsure if customers would favour online systems and they are sceptical of the benefits. However, since the start of the COVID-19 pandemic, the digital revolution has gathered pace. Research shows that almost 50% of people now prefer to transact online with customers, suppliers and merchants, often preferring the more efficient and sustainable option.

Those that fail to invest and realise the potential of these digital solutions risk losing out to more agile competitors. They may also fall foul of future legislation as sustainability becomes an increasingly influential factor driving buying decisions.

“Since the start of the COVID-19 pandemic, the digital revolution has gathered pace. Research shows that almost 50% of people now prefer to transact online with customers, suppliers and merchants, often preferring the more efficient and sustainable option.”

Monthly: Index and Categories

September 2020* – September 2021

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



MONTHLY SALES VALUE INDEX	Index	2020				2021								
		Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
Total Builders Merchants	100	128.7	126.4	123.5	83.5	100.7	109.4	151.9	150.6	141.4	157.1	151.1	139.3	147.9
Timber & Joinery Products	100	139.3	141.1	139.9	95.2	120.0	128.8	175.7	176.3	173.2	199.6	199.8	182.6	193.3
Heavy Building Materials	100	125.4	122.8	119.4	78.1	95.9	102.0	141.3	137.4	128.6	142.8	136.8	127.0	136.2
Decorating	100	113.1	111.7	110.5	76.2	85.8	95.7	121.7	113.2	106.5	116.7	115.0	108.7	114.8
Tools	100	98.5	101.0	100.0	70.9	84.4	93.7	120.8	110.7	98.2	100.2	97.6	93.6	101.8
Workwear & Safetywear	100	111.1	125.2	126.7	87.9	122.3	111.3	118.2	104.0	95.8	111.8	92.8	95.7	106.5
Ironmongery	100	127.3	127.3	122.9	87.8	103.1	111.5	143.1	137.4	127.0	137.0	129.2	120.2	129.2
Landscaping	100	161.0	135.6	122.8	78.0	90.1	111.9	222.5	257.0	220.5	235.1	204.8	175.3	171.9
Plumbing, Heating & Electrical	100	115.4	126.0	125.9	96.1	111.3	120.3	137.1	119.2	112.9	123.7	113.7	109.7	126.7
Renewables & Water Saving	100	71.9	67.2	70.3	50.4	62.6	62.3	85.9	78.8	72.7	80.1	72.1	70.6	70.9
Kitchens & Bathrooms	100	117.3	119.3	122.7	87.4	94.4	107.4	120.7	113.5	111.5	125.1	126.5	118.3	131.2
Miscellaneous	100	122.3	120.8	118.9	86.1	109.4	107.1	131.2	126.2	111.2	120.3	121.6	116.2	128.4
Services	100	119.2	117.5	115.4	89.0	93.5	103.3	134.5	128.8	123.5	131.4	132.8	130.2	133.4

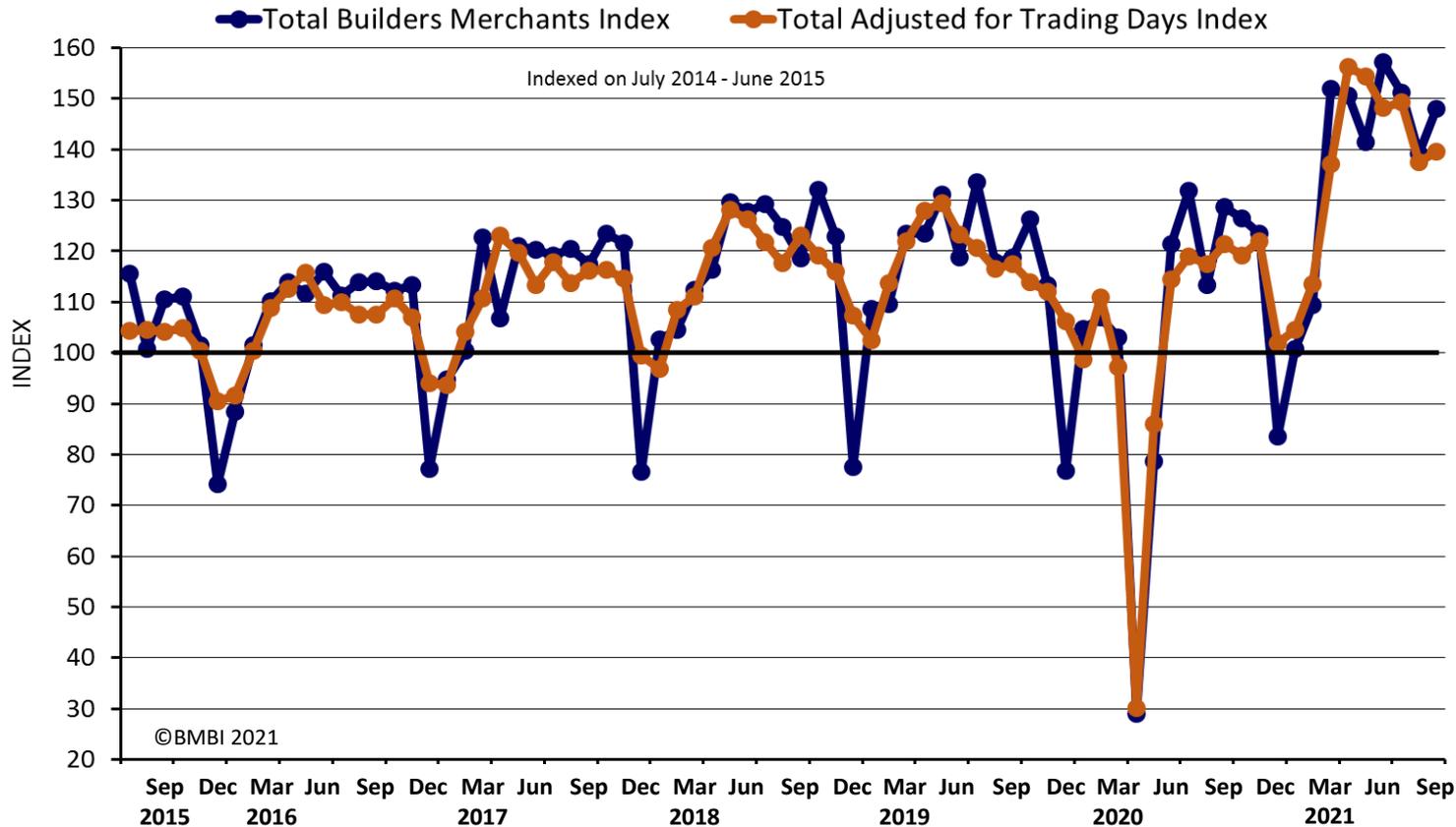
*Click the web link below to see the complete series of indices from July 2015.

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

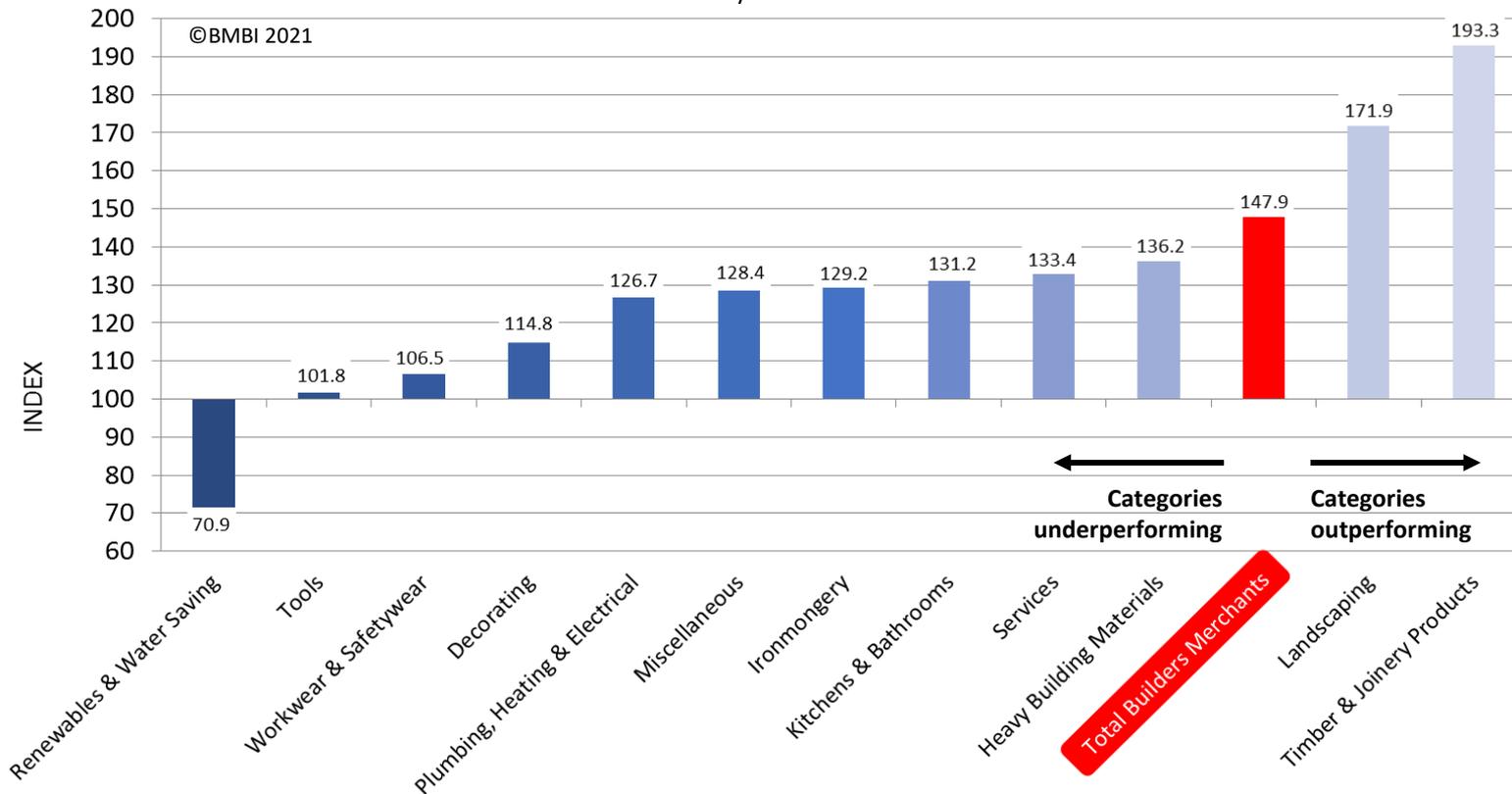
Monthly: Index and Categories

September 2021 index



September 2021 Index

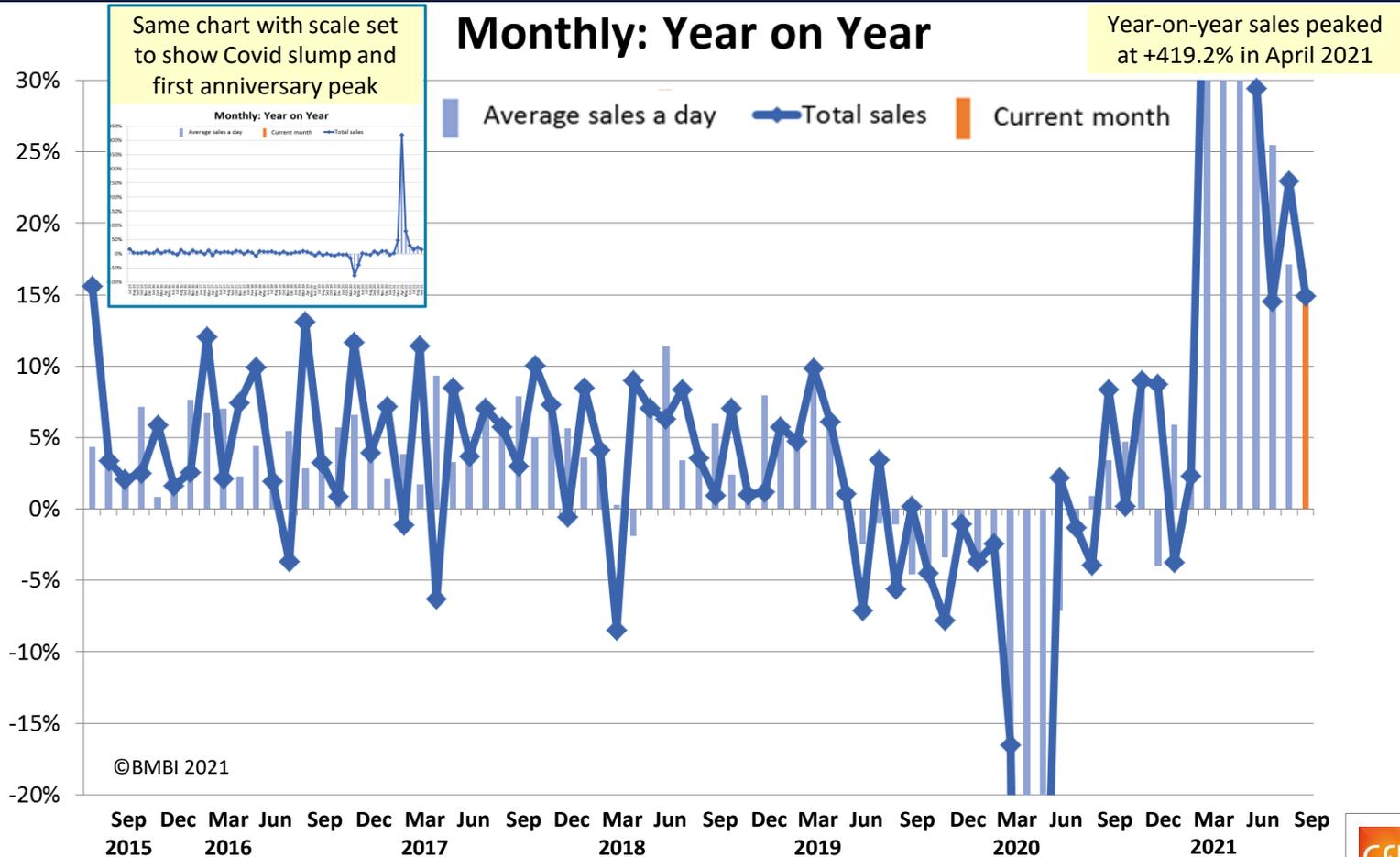
Indexed on July 2014 to June 2015



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

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



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

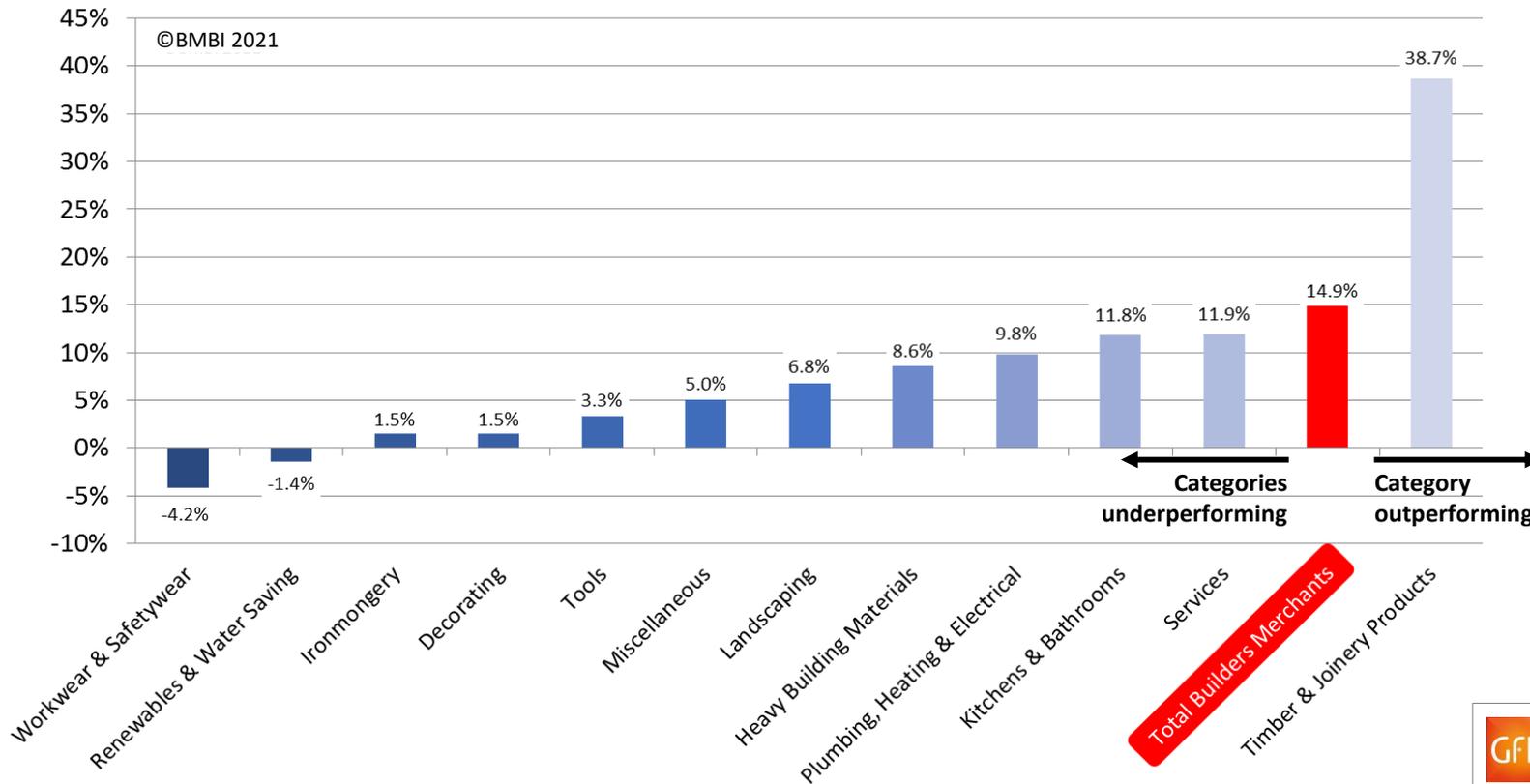
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

Monthly: This year v last year

September 2021 sales indices



September 2021 index v September 2020 index



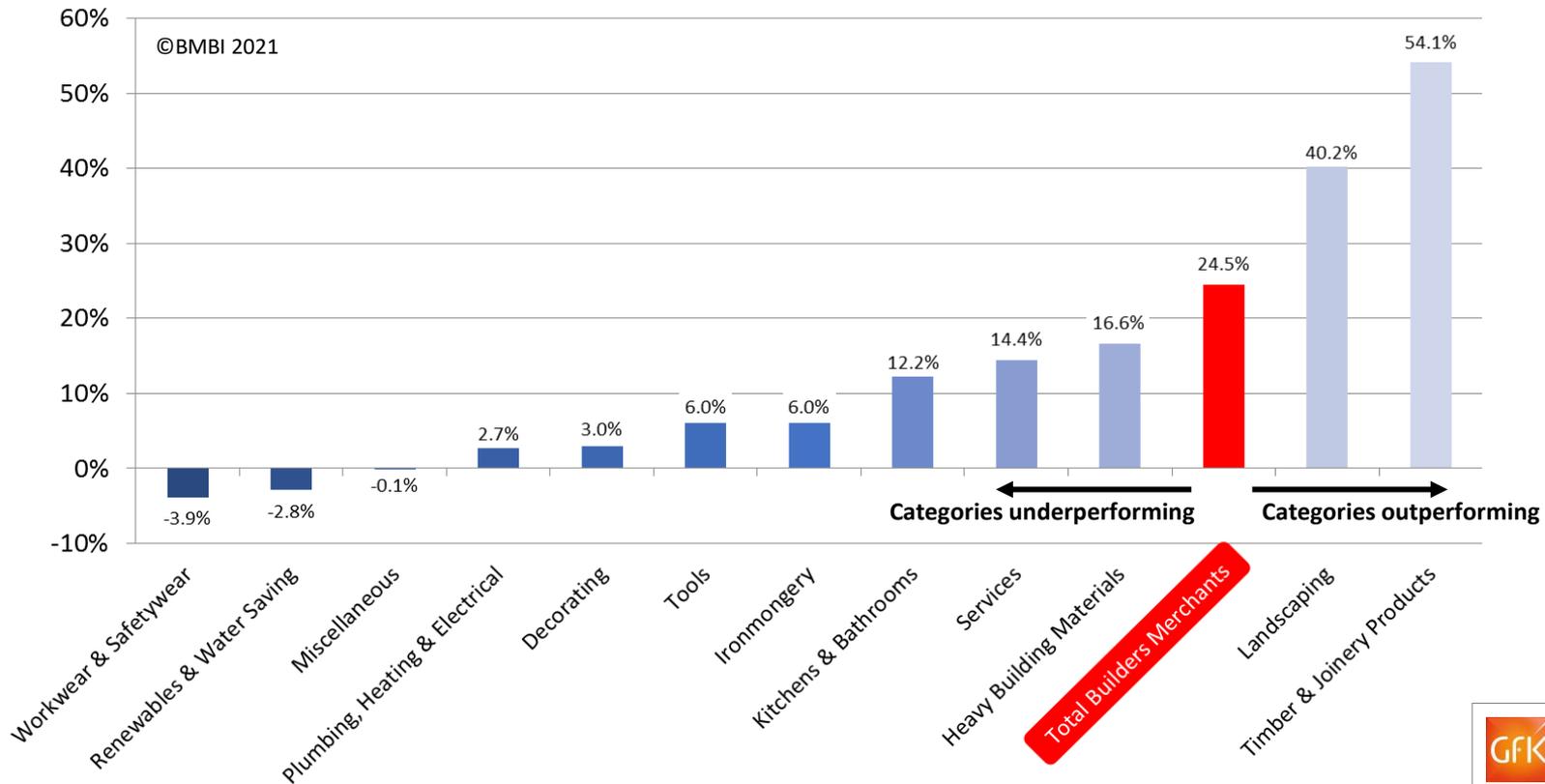
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly: This year v 2019

September 2021 2-year sales indices



2-year comparison: September 2021 v September 2019

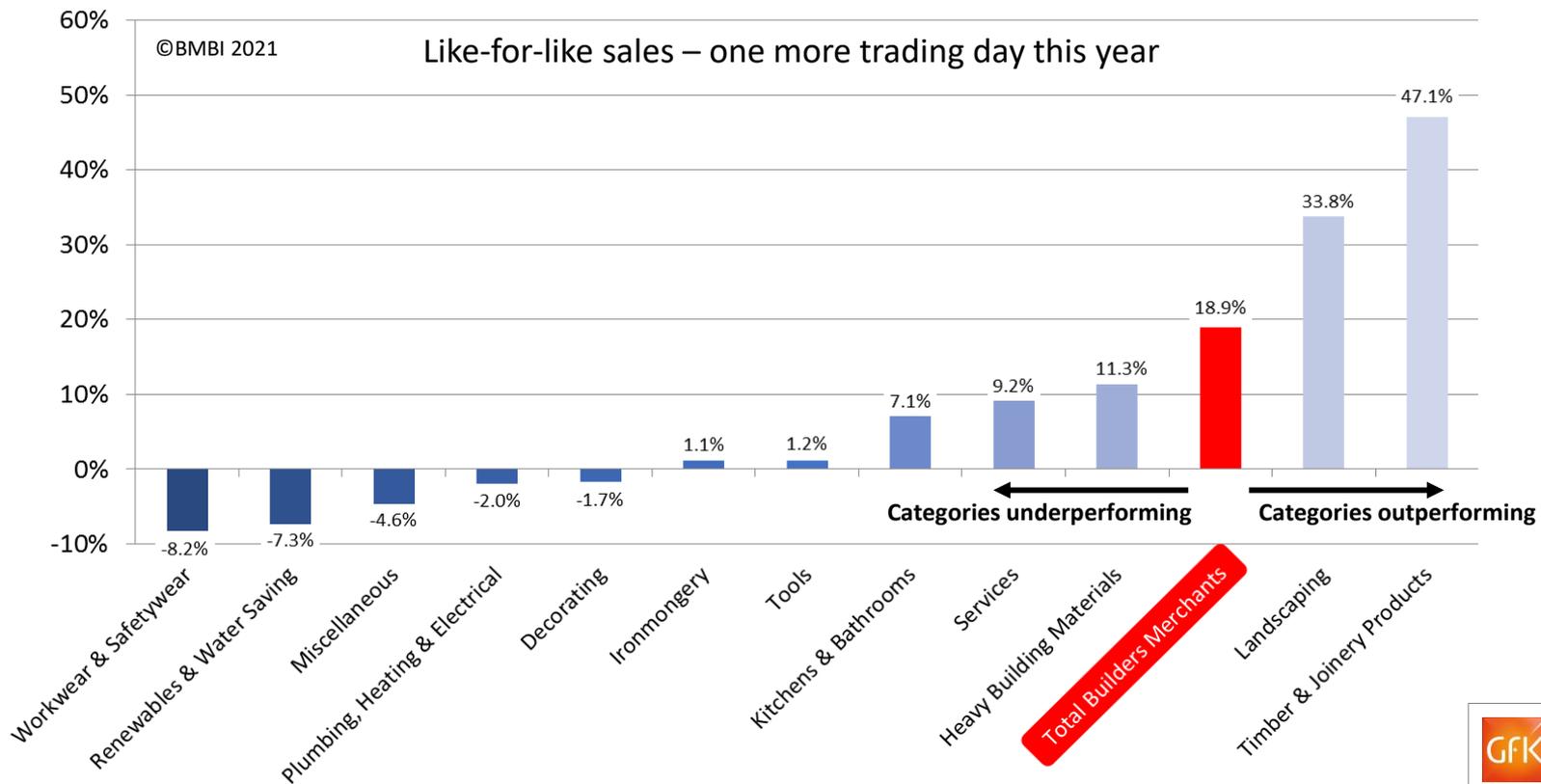


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly: This year v 2019

September 2021 2-year like-for-like sales indices

2-year comparison: September 2021 v September 2019

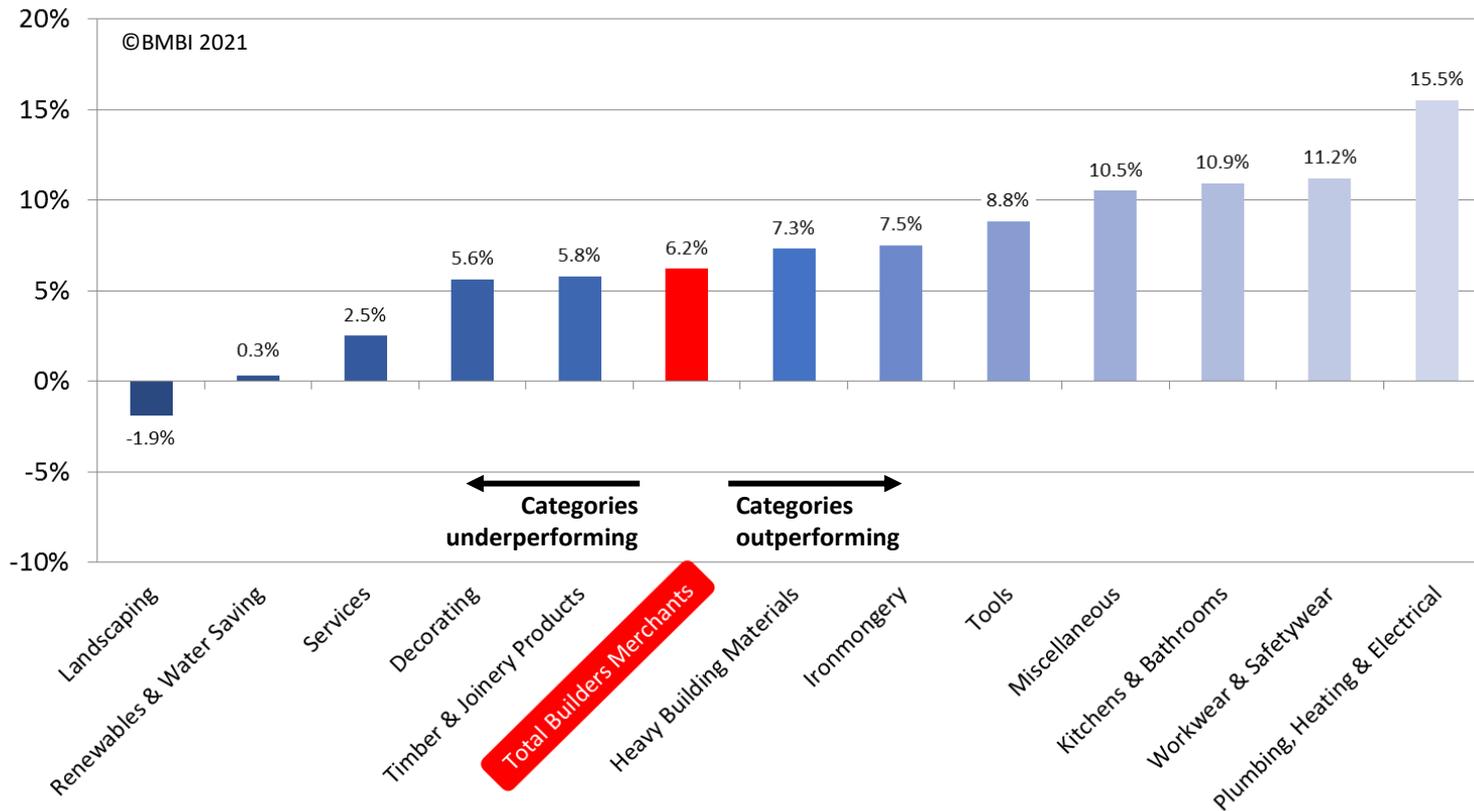


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly: This month v last month

September 2021 sales indices

September 2021 Index v August 2021 Index



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

Monthly: This month v last month

September 2021 like-for-like sales indices



September 2021 Index v August 2021 Index



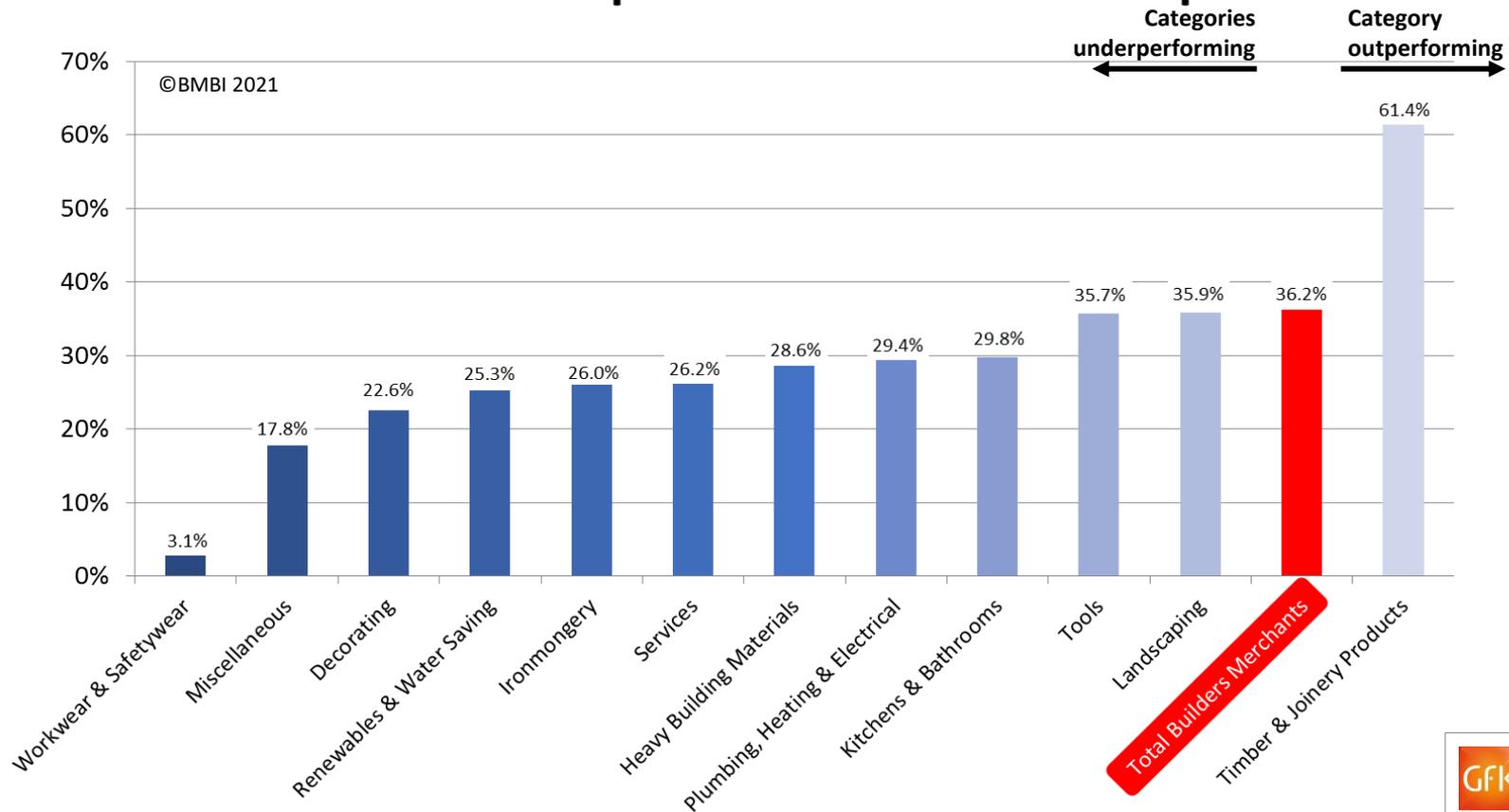
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Year to date: Year on Year

Last 9 months sales indices



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



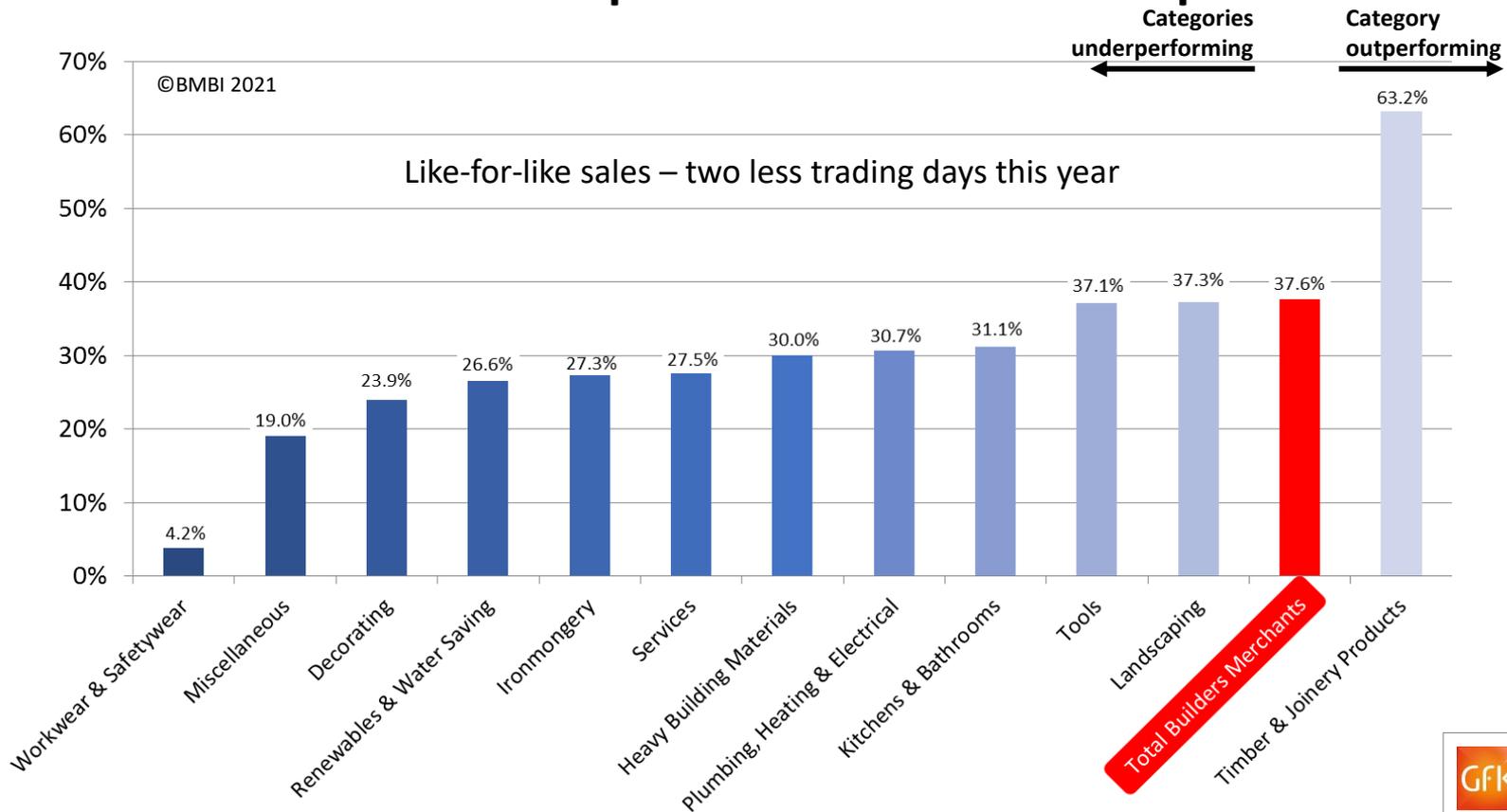
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Year to date: Year on Year

Last 9 months like-for-like sales indices



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

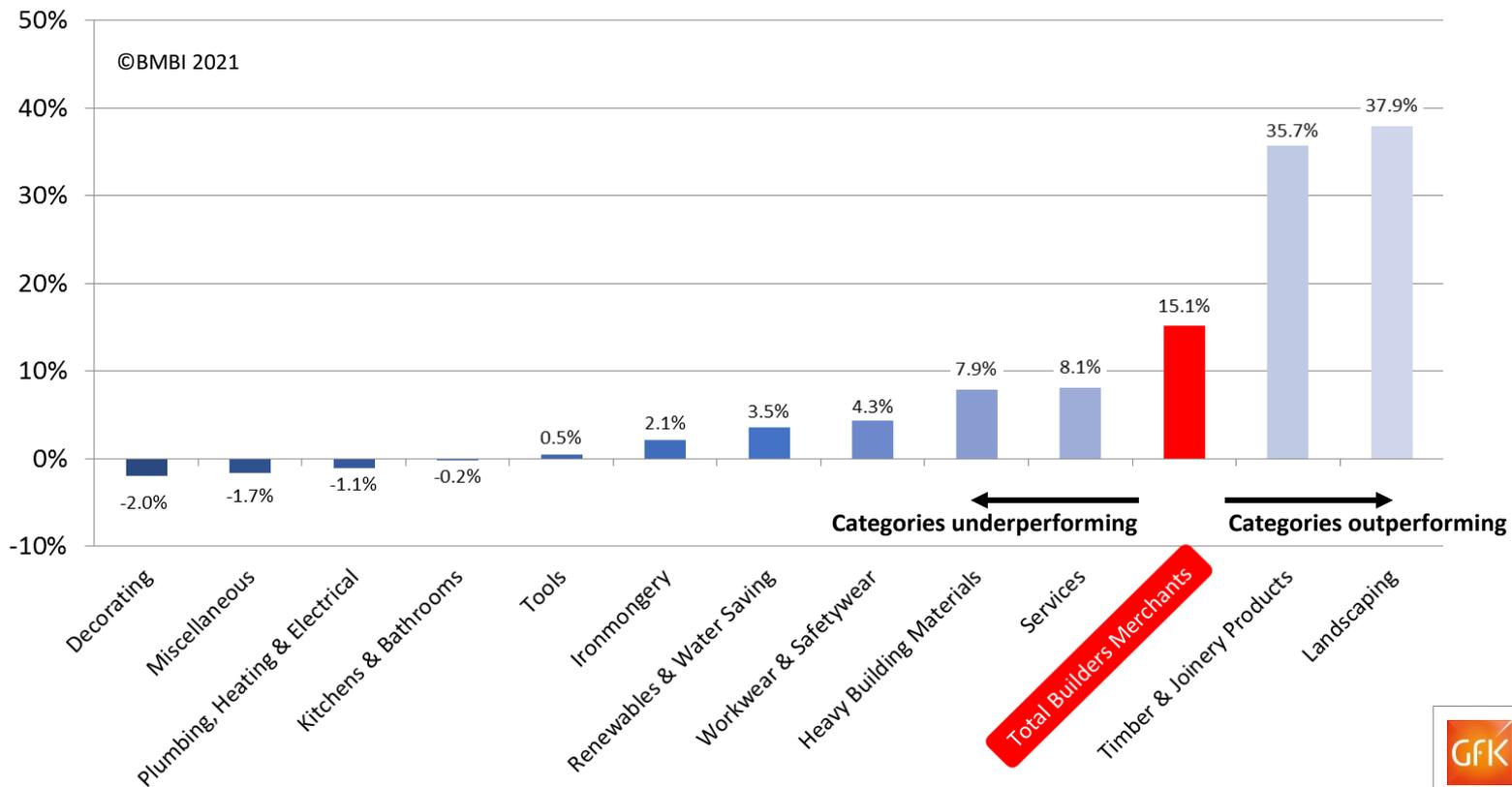


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Year to date: v 2019

Last 9 months 2-year sales indices

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



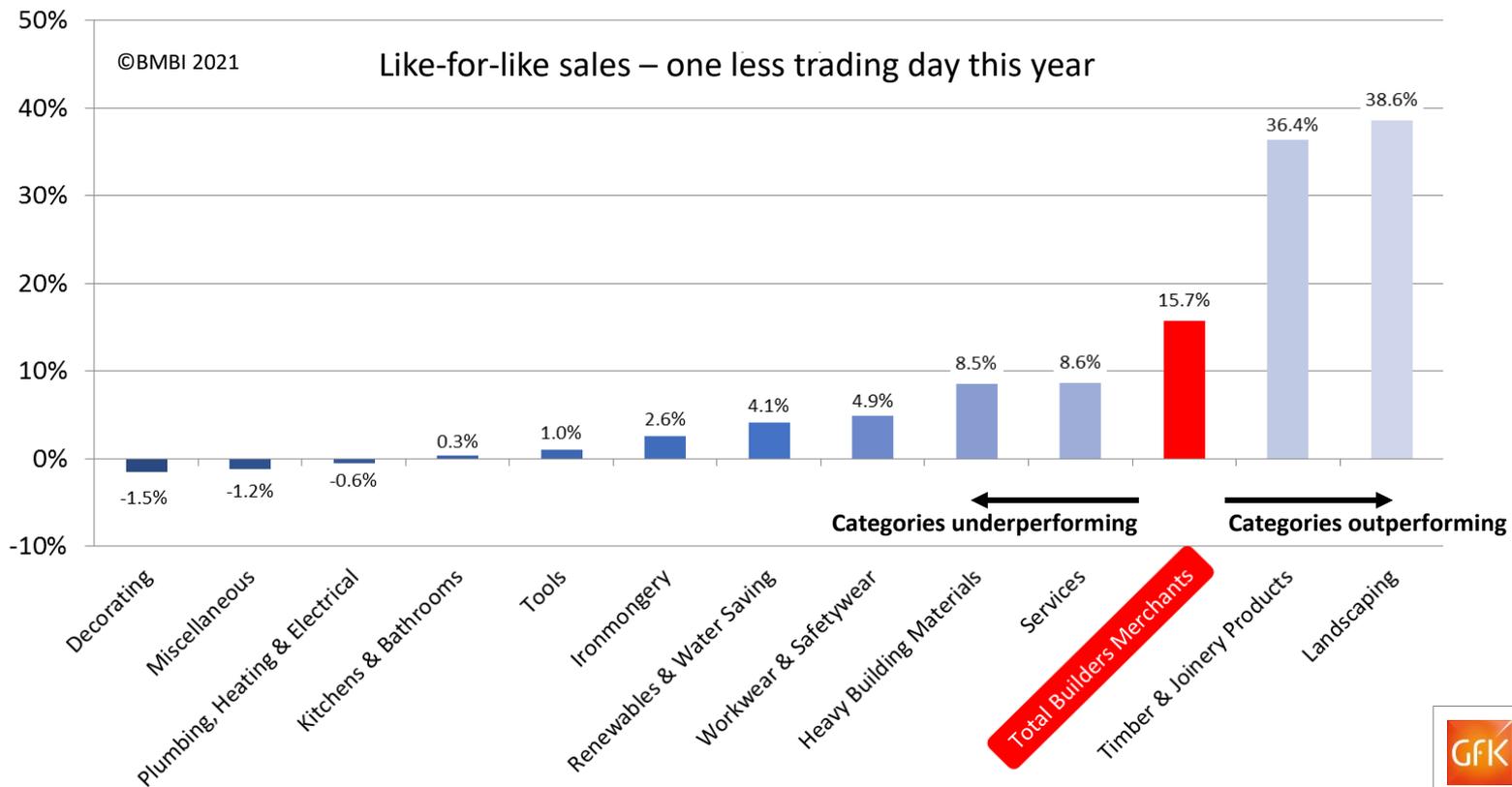
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

Year to date: v 2019

Last 9 months 2-year like-for-like sales indices



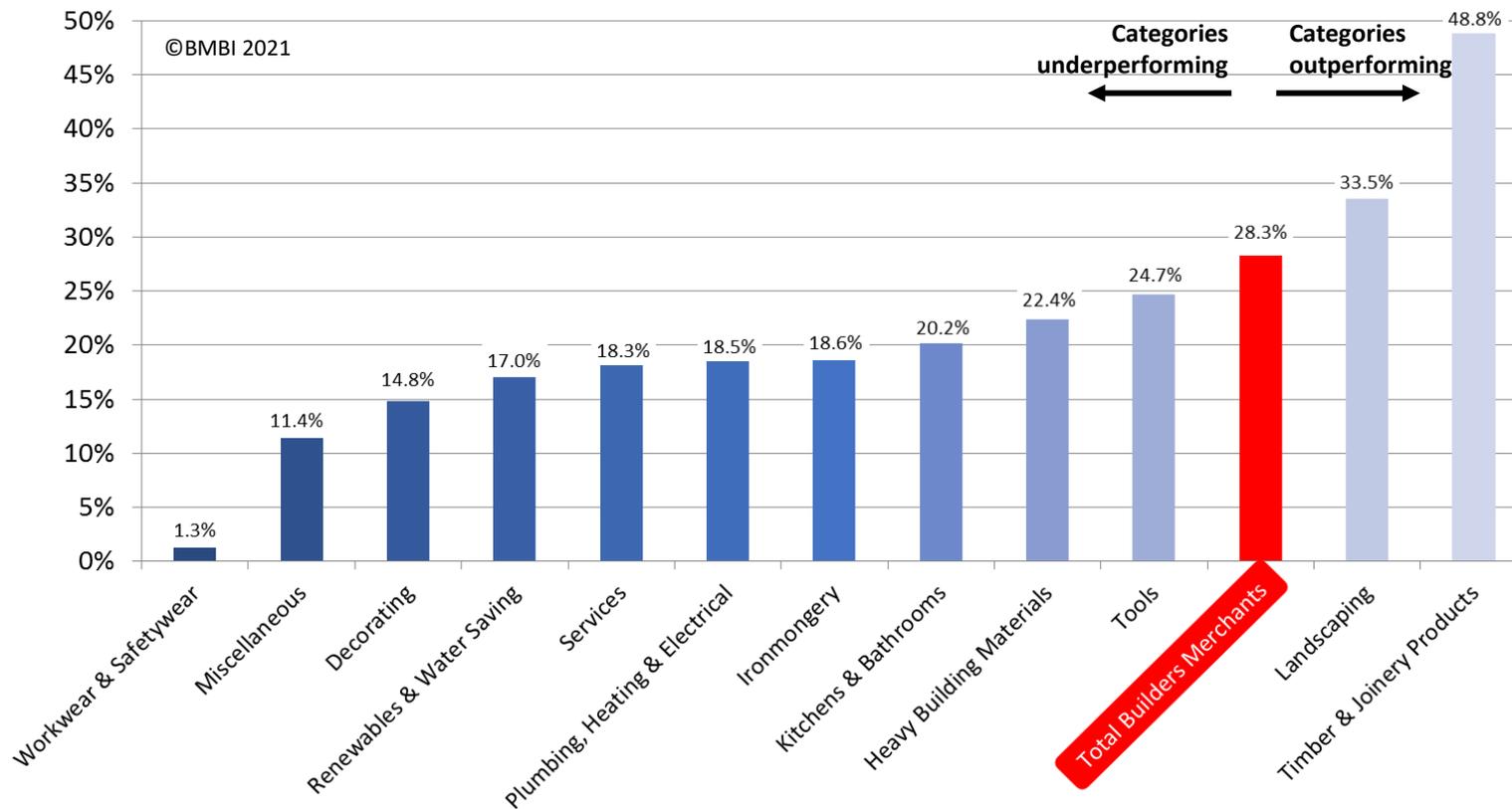
2-year comparison: Jan 21 to Sep 21 v Jan 19 to Sep 19



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

Last 12 Months: Year on Year

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



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

Last 12 Months: Year on Year

Like-for-like sales indices



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



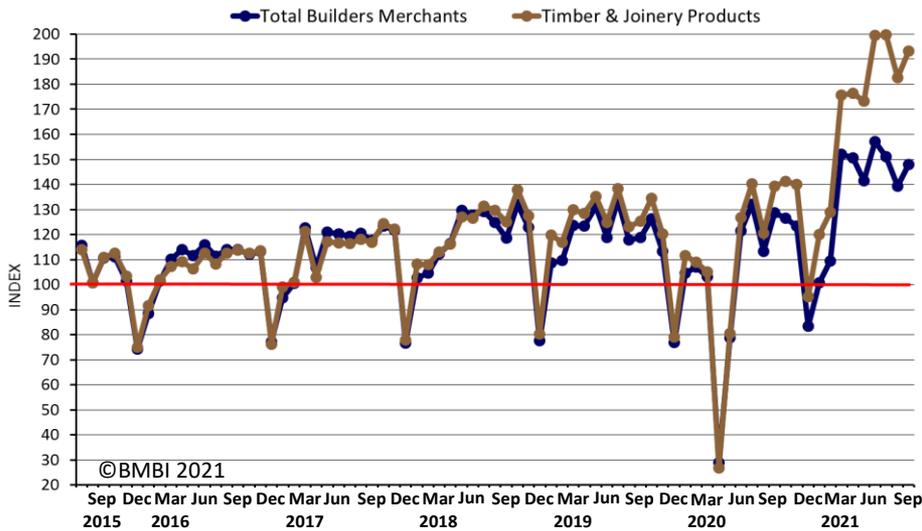
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly and Quarterly Indices

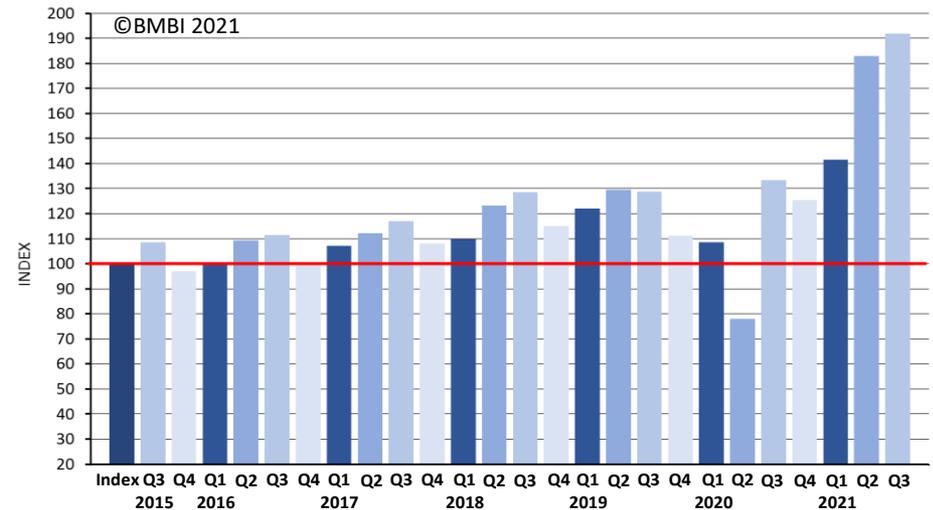
September 2021 and Q3 2021



Timber & Joinery Products



Timber & Joinery Products - Quarterly



Charts indexed on July 2014 – June 2015

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

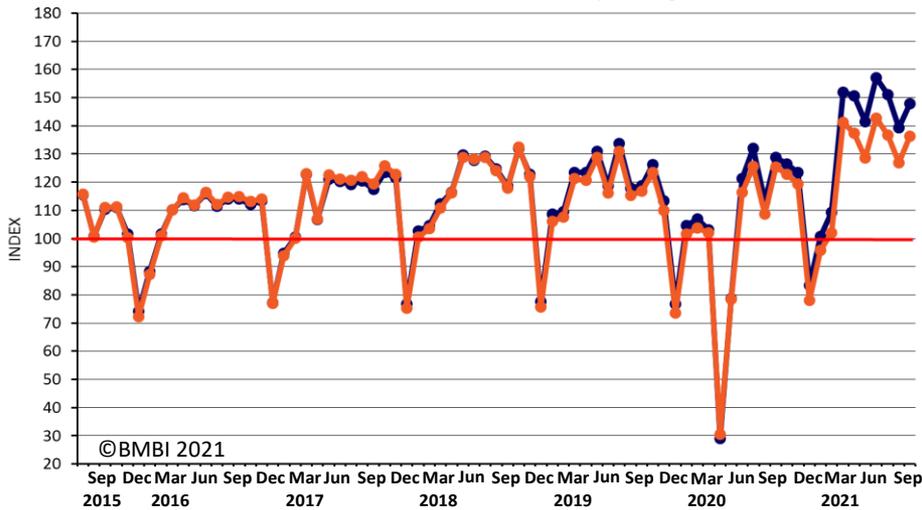
Monthly and Quarterly Indices

September 2021 and Q3 2021

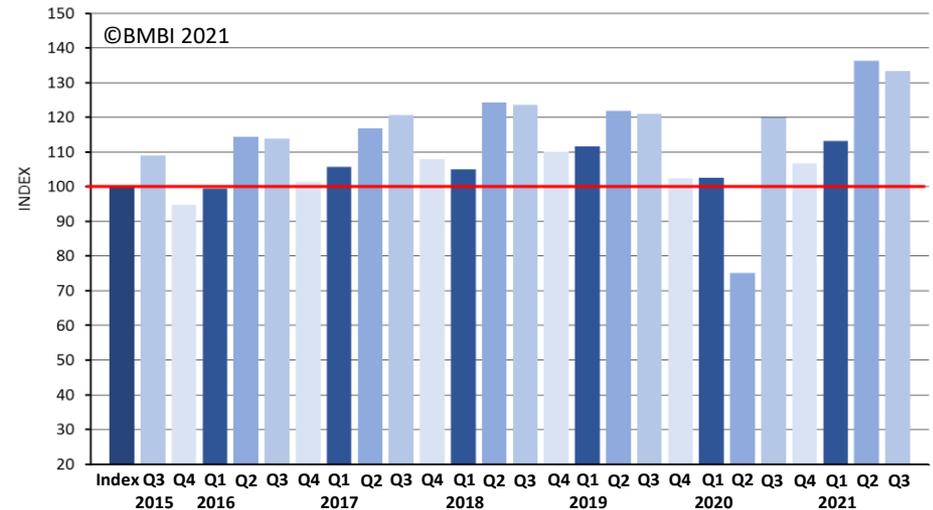


Heavy Building Materials

◆ Total Builders Merchants ◆ Heavy Building Materials



Heavy Building Materials - Quarterly



Charts indexed on July 2014 – June 2015

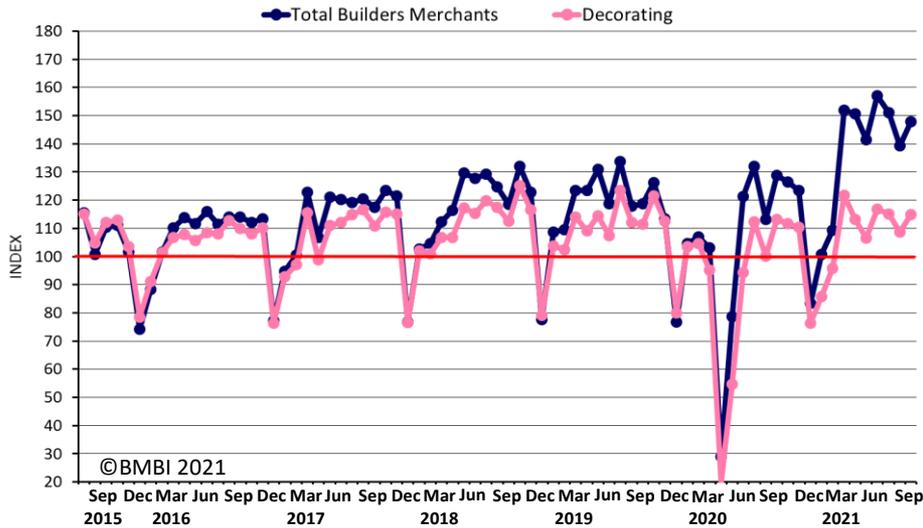
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly and Quarterly Indices

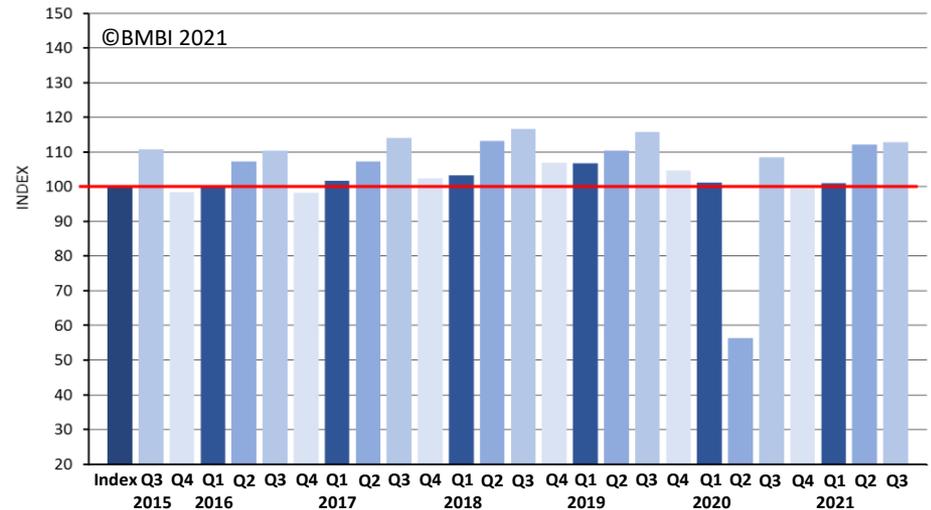
September 2021 and Q3 2021



Decorating



Decorating - Quarterly



Charts indexed on July 2014 – June 2015

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

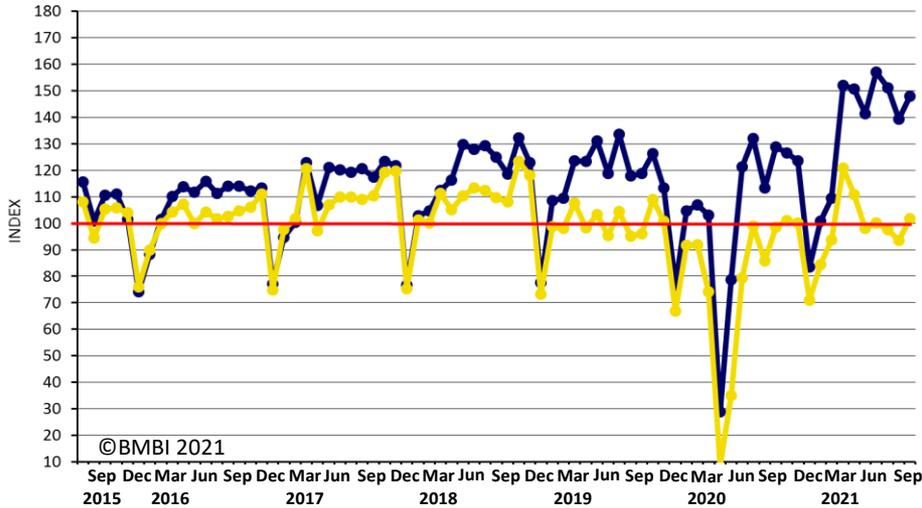
Monthly and Quarterly Indices

September 2021 and Q3 2021

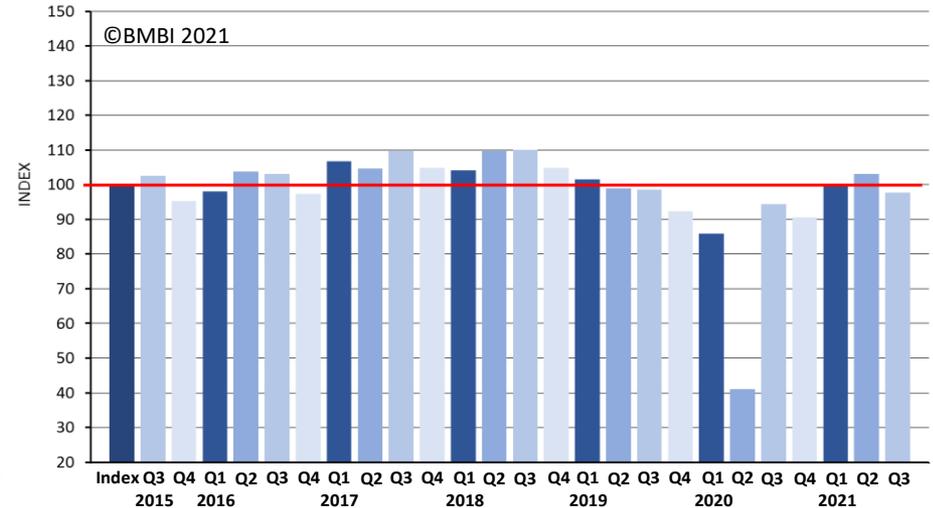


Tools

◆ Total Builders Merchants ◆ Tools



Tools - Quarterly



Charts indexed on July 2014 – June 2015

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

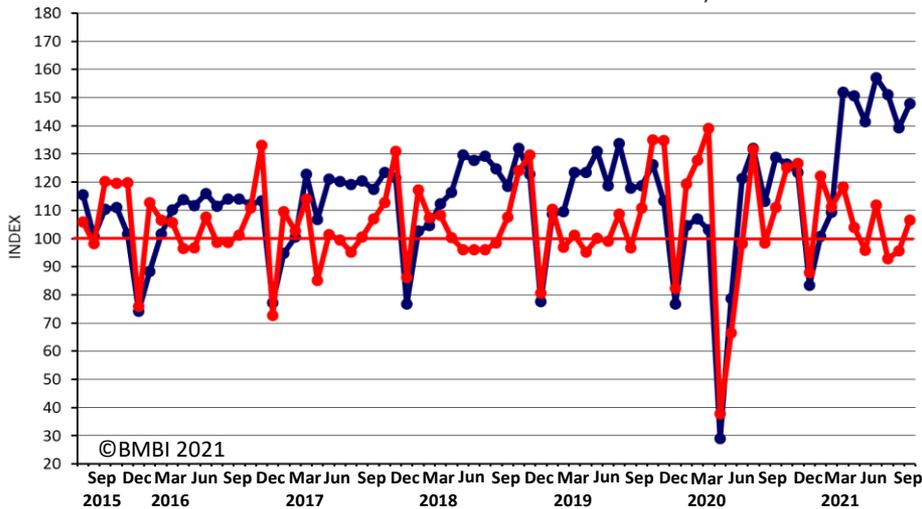
Monthly and Quarterly Indices

September 2021 and Q3 2021

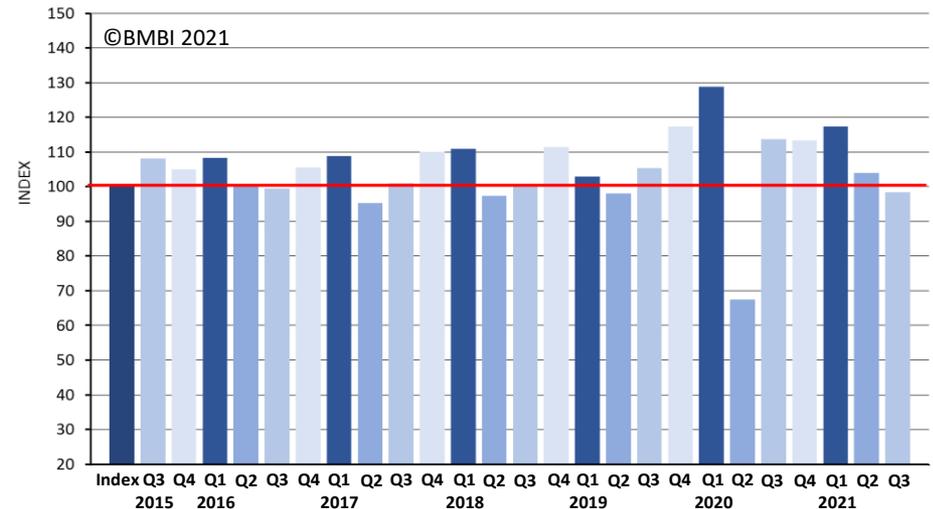


Workwear & Safetywear

— Total Builders Merchants — Workwear & Safetywear



Workwear & Safetywear - Quarterly



Charts indexed on July 2014 – June 2015

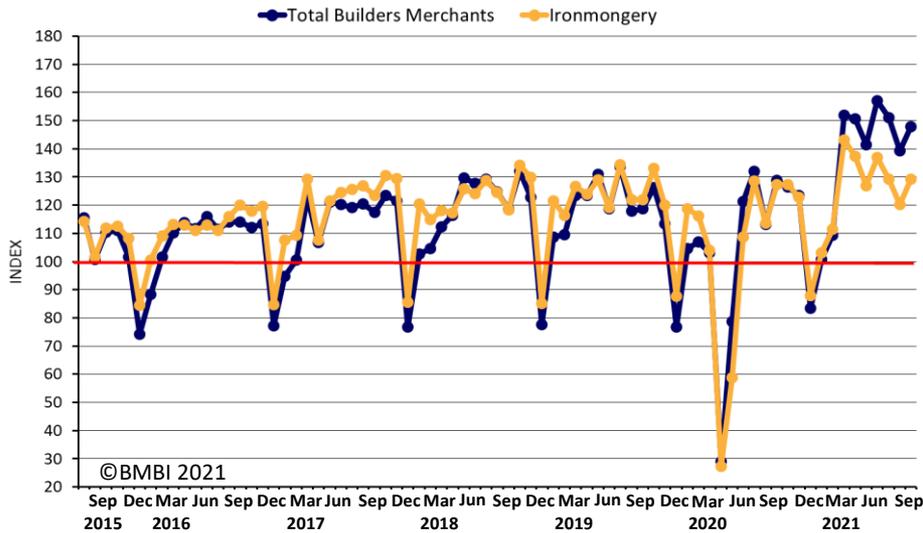
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly and Quarterly Indices

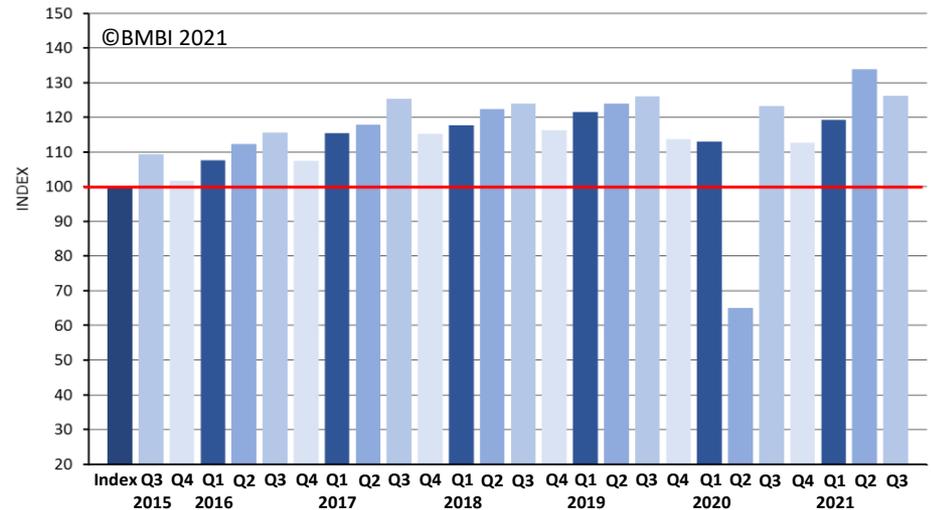
September 2021 and Q3 2021



Ironmongery



Ironmongery - Quarterly



Charts indexed on July 2014 – June 2015

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

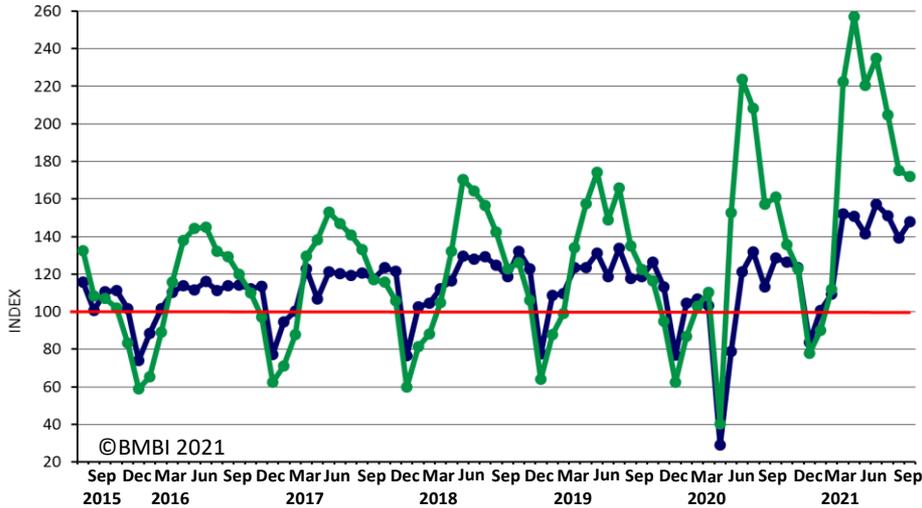
Monthly and Quarterly Indices

September 2021 and Q3 2021

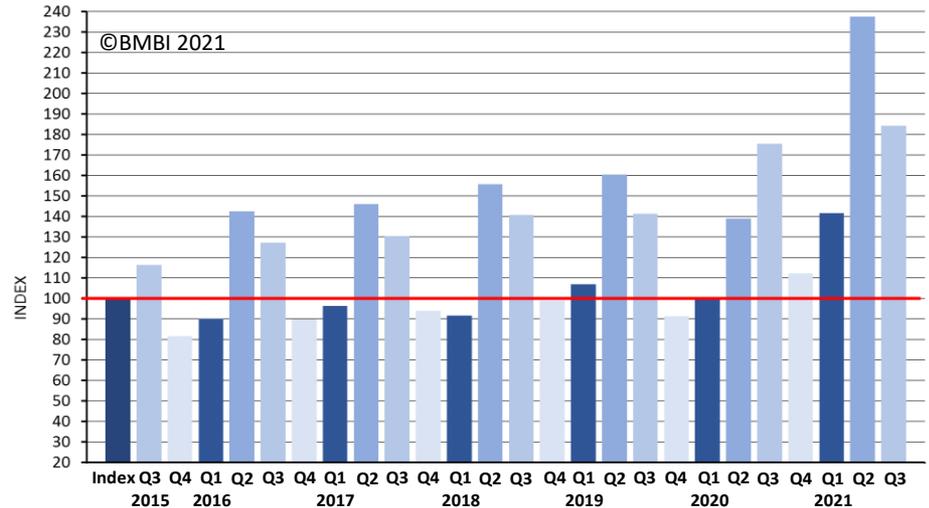


Landscaping

◆ Total Builders Merchants ◆ Landscaping



Landscaping - Quarterly



Charts indexed on July 2014 – June 2015

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

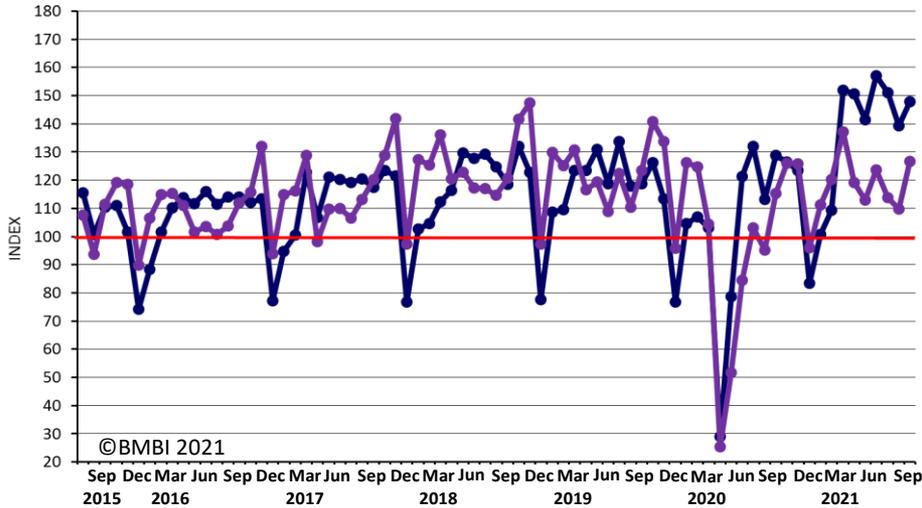
Monthly and Quarterly Indices

September 2021 and Q3 2021

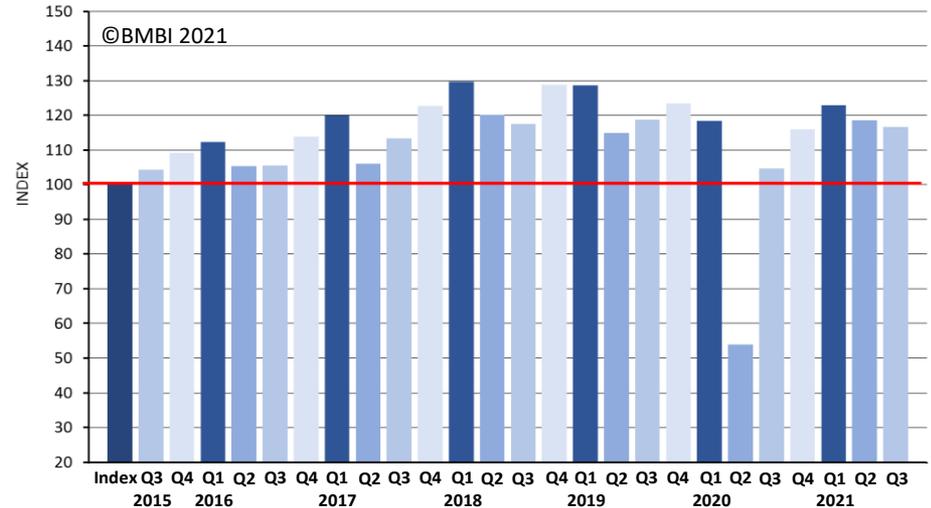


Plumbing, Heating & Electrical

● Total Builders Merchants ● Plumbing, Heating & Electrical



Plumbing, Heating & Electrical - Quarterly



Charts indexed on July 2014 – June 2015

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

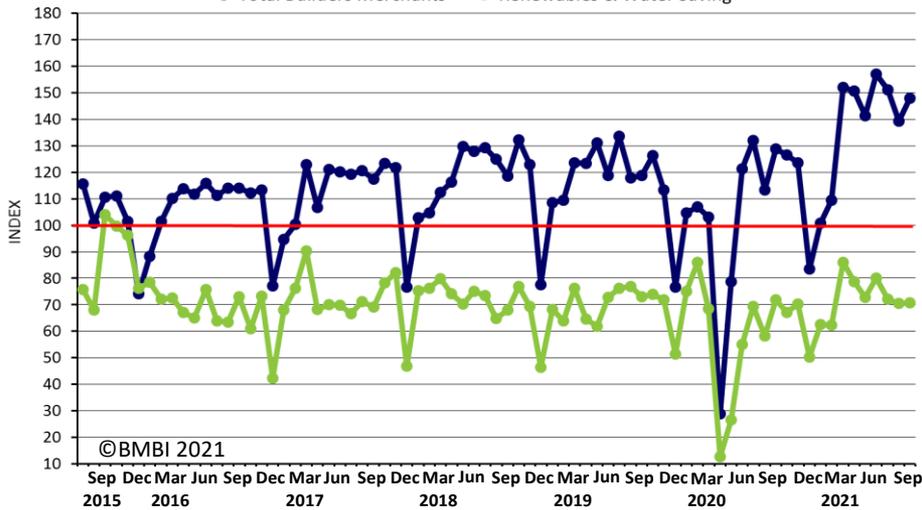
Monthly and Quarterly Indices

September 2021 and Q3 2021

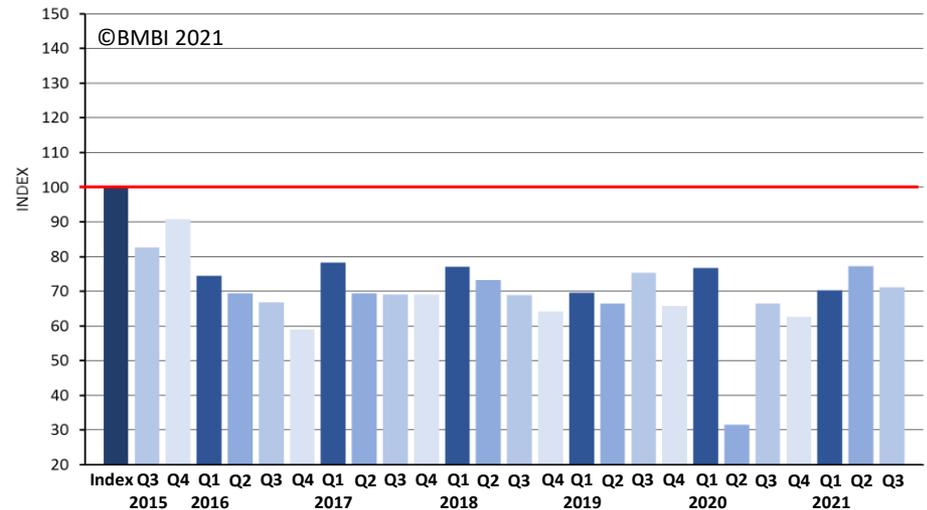


Renewables & Water Saving

— Total Builders Merchants — Renewables & Water Saving



Renewables & Water Saving - Quarterly



Charts indexed on July 2014 – June 2015

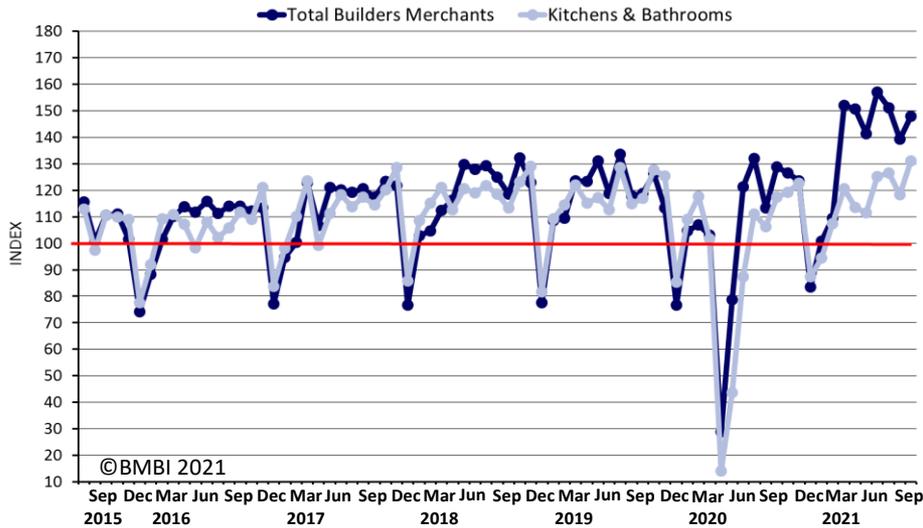
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly and Quarterly Indices

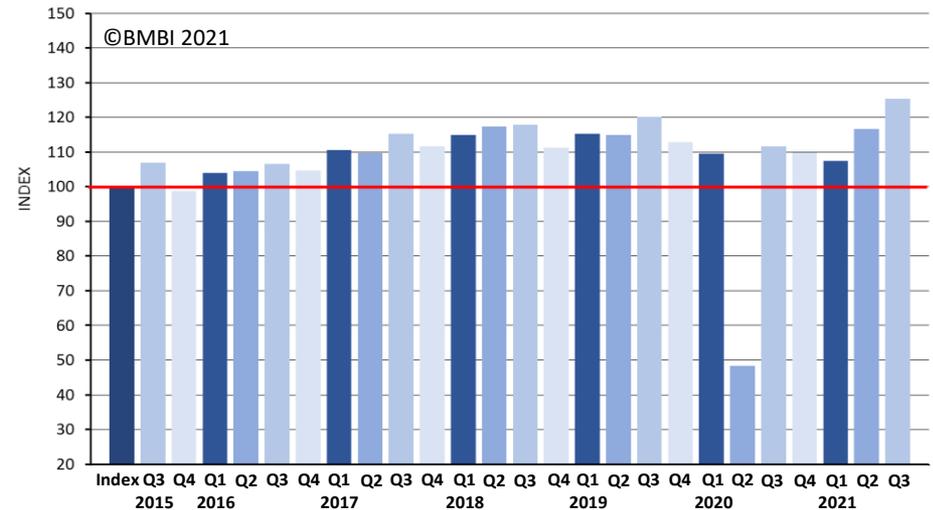
September 2021 and Q3 2021



Kitchens & Bathrooms



Kitchens & Bathrooms - Quarterly



Charts indexed on July 2014 – June 2015

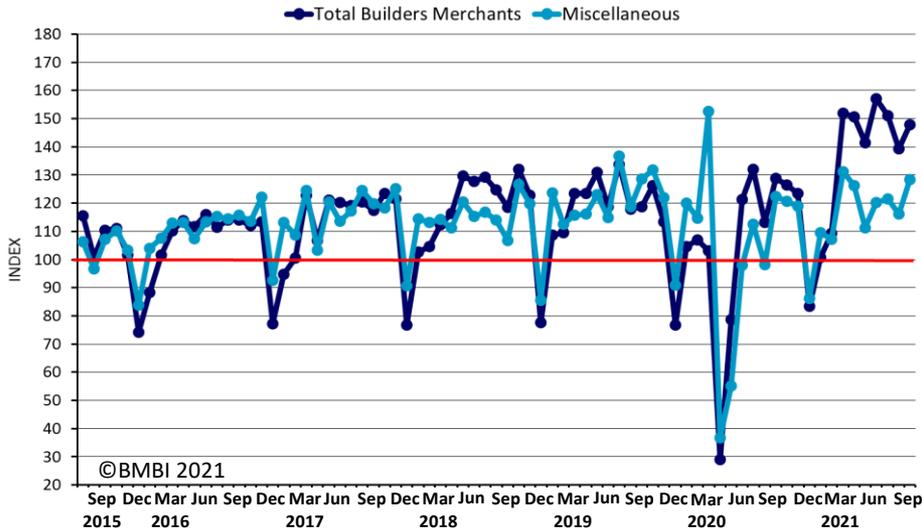
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2021

Monthly and Quarterly Indices

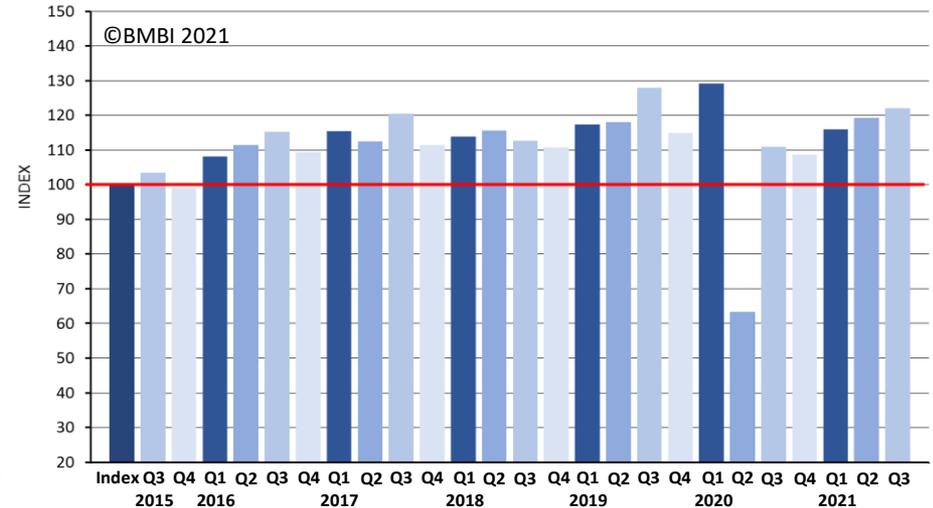
September 2021 and Q3 2021



Miscellaneous



Miscellaneous- Quarterly

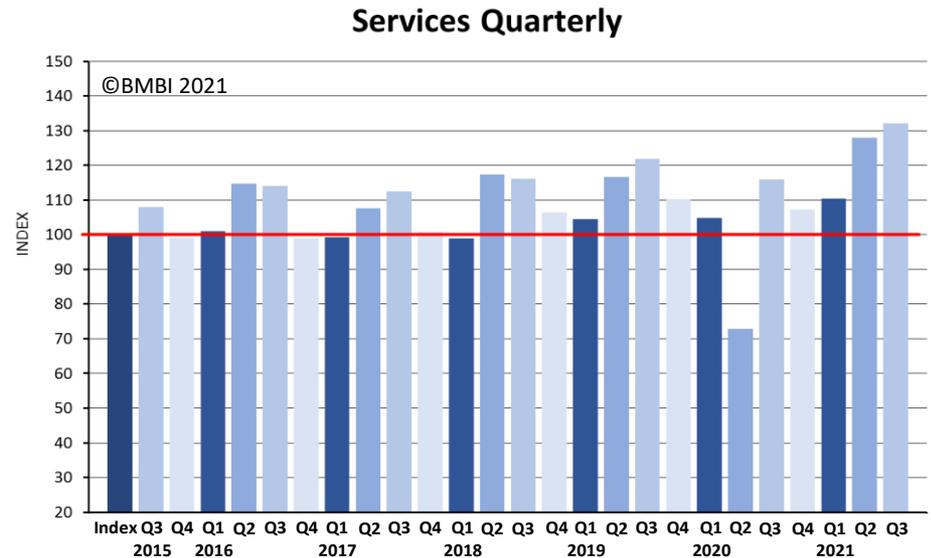
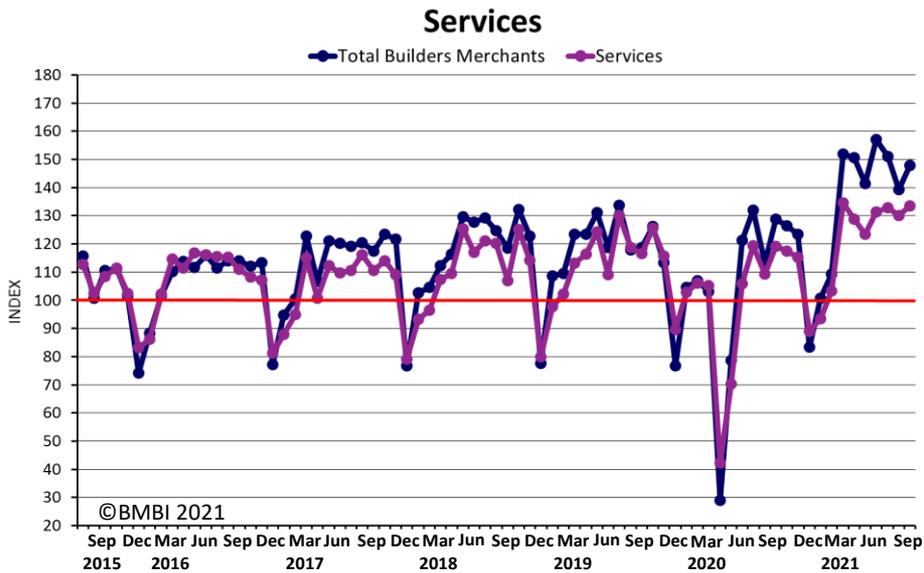


Charts indexed on July 2014 – June 2015

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

Monthly and Quarterly Indices

September 2021 and Q3 2021



Charts indexed on July 2014 – June 2015

Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 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	22			

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	64	

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

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

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

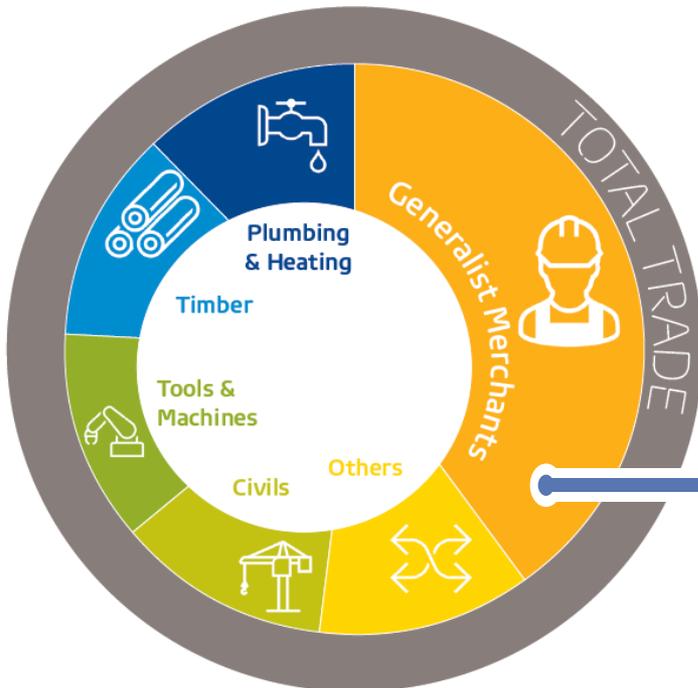
GfK's Definition of Builders Merchant Panel



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

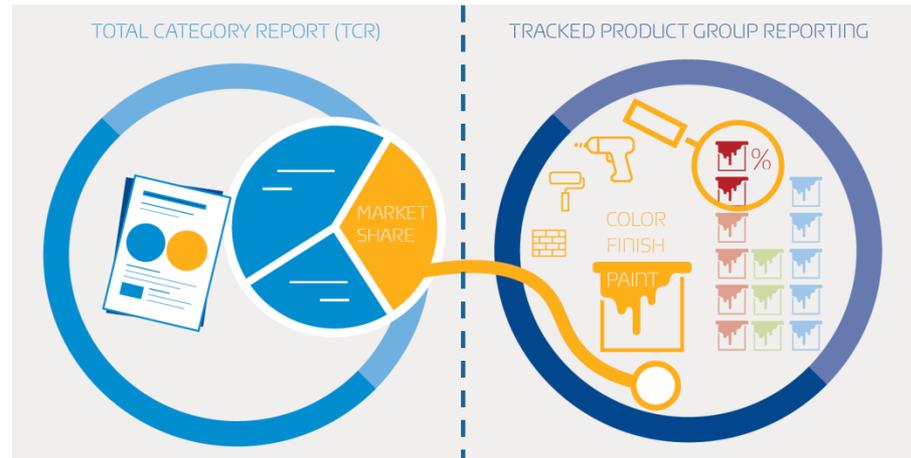
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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)

Macro factors impacting Merchants



Bank interest rates

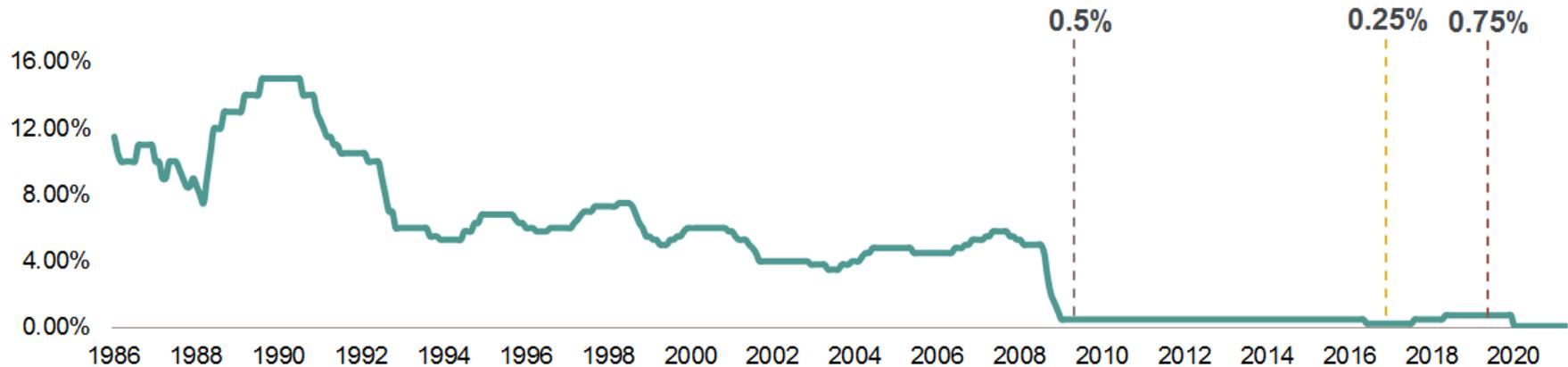
Set monthly by the MPC (Monetary Policy Committee)

▪ The base rate of interest is one of the tools used by the Bank of England to target price stability. Since 1997, when the Bank's Monetary Policy Committee gained autonomy, the rate has been between 7.5% and 0.25%.

▪ The economic crisis caused the Bank to drop rates to 0.5%, as the inflation pressure was considered less important than the stability of the economy.
▪ The further reduction in August 2016 was designed to further promote growth and achieve the Bank's 2% inflation target.

▪ At its meeting on 4 August 2016, the Bank of England reduced the base rate from the previous historic low of 0.5% to a record-breaking 0.25%.

▪ The MPC voted unanimously to maintain Bank Rate at 0.1% in September 2021.
▪ The Committee voted unanimously for the Bank of England to maintain the stock of sterling non-financial investment-grade corporate bond purchases, financed by the issuance of central bank reserves, at £20 billion.



Source: Bank of England

© GfK 2020 | Consumer Confidence Barometer | September 2021

Macro factors impacting Merchants



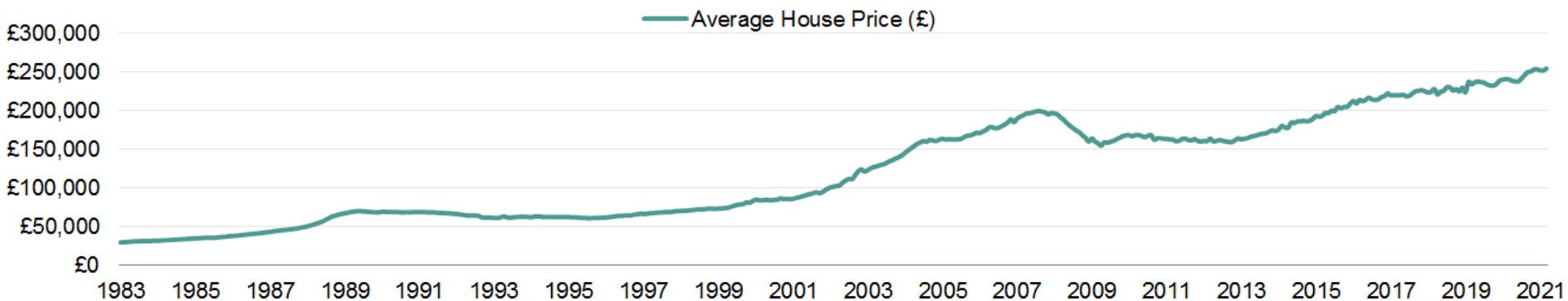
Standardised average house prices

Average Price (year end)		
2010	£168,390	+3%
2015	£208,286	+10%
2016	£222,190	+7%
2017	£225,032	+1%
2018	£229,729	+2%
2019	£238,963	+2%
2020	£244,112	+2%

▪ Average house prices climbed again in August, with the cost of a property increasing by 0.7% or £1,789. Back-to-back monthly price gains have now pushed the cost of a typical home to a record of £262,954, topping the previous high (£261,642) recorded in May this year.

▪ At the end of August 2021, the average house price in the UK increased to £262,954 from £261,221 in July 2021.

▪ House prices in August were 7.1% higher than in the same month a year earlier.



Source: Halifax House Price Index

© GfK 2020 | Consumer Confidence Barometer | September 2021

Macro factors impacting Merchants



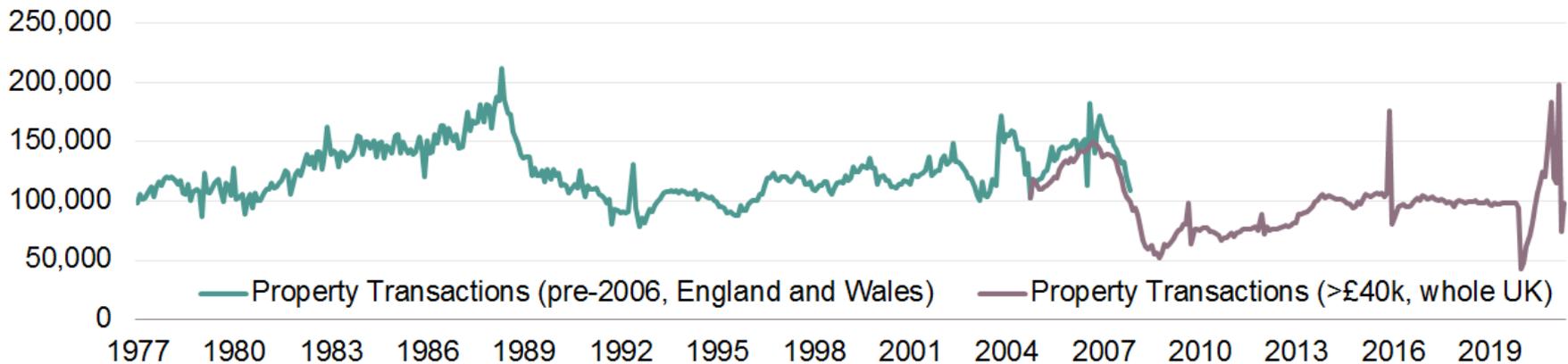
Property transactions

Monthly transactions, residential, seasonally adjusted

Annual total	
2016	1,234,500
2017	1,223,400
2018	1,190,350
2019	1,171,520
2020	1,041,610

- Stamp duty was altered significantly on 1 December 2003.
- In April 2016, there were major changes to the amount of Stamp Duty property investors will have to pay when purchasing a second home or a buy to let property.

- The seasonally adjusted UK property transaction count for August 2021 was 98,300 residential and 10,250 non-residential transactions.
- The seasonally adjusted count of residential property transactions in August 2021 is 32.0% higher than July 2021 and 20.8% higher than August 2020.



Source: HM Revenue & Customs

© GfK 2020 | Consumer Confidence Barometer | September 2021

Macro factors impacting Merchants



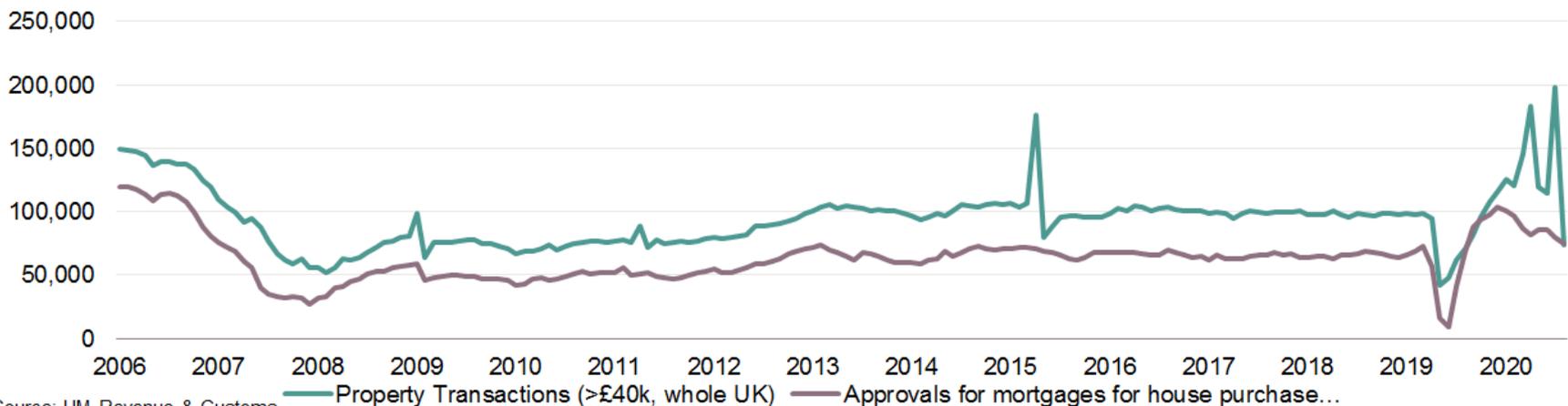
Mortgage approvals and property transactions

Monthly residential transactions and mortgage approvals (seasonally adjusted)

▪ Mortgage approvals for house purchase refers to the firm offers of lenders to advance credit secured on specific dwellings to their customers.

▪ The number of loan approvals for house purchase in the United Kingdom fell to 75,152 in July 2021 - this represents a 6.4% decrease from June 2021.

▪ The March/April 2016 peak and subsequent fall in property transactions, may be attributed to people rushing to beat the new stamp duty changes coming into force in April 2016.



Source: HM Revenue & Customs

Property Transactions (>£40k, whole UK) Approvals for mortgages for house purchase...

© GfK 2020 | Consumer Confidence Barometer | September 2021

Macro factors impacting Merchants



Consumer Confidence Index



The Index Score is calculated using the results of five questions (1,2,3,4, and 8). The mean score from each of these five questions is combined and the Index Score is the average.

“building **excellence**
in materials supply”

Plumbing & Heating Merchant Index



Quarter 3 2021

(Published 23 November 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 Aiken: toby.aiken@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.

Strong third quarter driven by buoyant July and August

September

September 2021 plumbing and heating value sales, with data from over 80% of Plumbing & Heating merchants' sales, were up 1.7% on September 2020. (See [page 81](#)). Compared with 2 years ago, total sales were up 4.6%, with one more trading day this year. Like-for-like sales, which take trading day differences into account, were 0.2% lower ([page 82](#)).

Sales in September were 12.7% higher than in August, with one more trading day this month ([page 84](#)). Like-for-like sales were 7.5% higher than in August.

Quarter 3:

Sales in the third quarter were up 7.3% compared with July to September last year, with one less trading day this year. ([page 78](#)). Most of this growth was driven by strong year-on-year sales in July (+12.8%) and August (+8.3%), whereas September grew more slowly (1.7%). Like-for-like sales were 9.0% higher. Compared with two years ago, total sales were up 1.7% in the third quarter, with one less trading day this year. Like-for-like sales increased by 3.2%.

Other periods:

In the nine months to September 2021, total revenue was 25.3% higher than in Covid-affected January-September 2020, with two less trading days this year ([page 86](#)). Like-for-like sales were up 26.6%. Total sales in January to September 2021 were 3.1% higher than the same nine months in 2019, with one less trading day this year ([page 87](#)). Average sales a day were 3.6% higher.

The rolling 12 months October 2020 to September 2021 were 17.6% ahead of October 2019 to September 2020 ([page 88](#)), with one less trading day in the most recent period. Like-for-like sales increased by 18.1%

PHMI index:

The PHMI Index, which contrasts sales with the base period of January to December 2019, was 104.8 for September, which included one more trading day – see the table on [page 76](#) and the chart on [page 80](#). The table on [page 76](#) and chart on [page 77](#) show the PHMI Index for Quarter 3 2021 was slightly lower at 99.1, with two less trading days.

Sales in the third quarter were up 7.3% compared with July to September last year. Most of this growth was driven by strong year-on-year sales in July (+12.8%) and August (+8.3%). September grew more slowly (1.7%).

Indices: Monthly and quarterly

October 2020 to September 2021

(Indexed on January to December 2019)

Oct 20	Nov 20	Dec 20	Three months
115.2	111.1	83.9	103.4
Jan 21	Feb 21	Mar 21	Three months
99.4	102.4	118.2	106.6
Apr 21	May 21	Jun 21	Three months
101.8	97.4	99.2	99.5
Jul 21	Aug 21	Sep 21	Three months
99.6	93.0	104.8	99.1

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

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

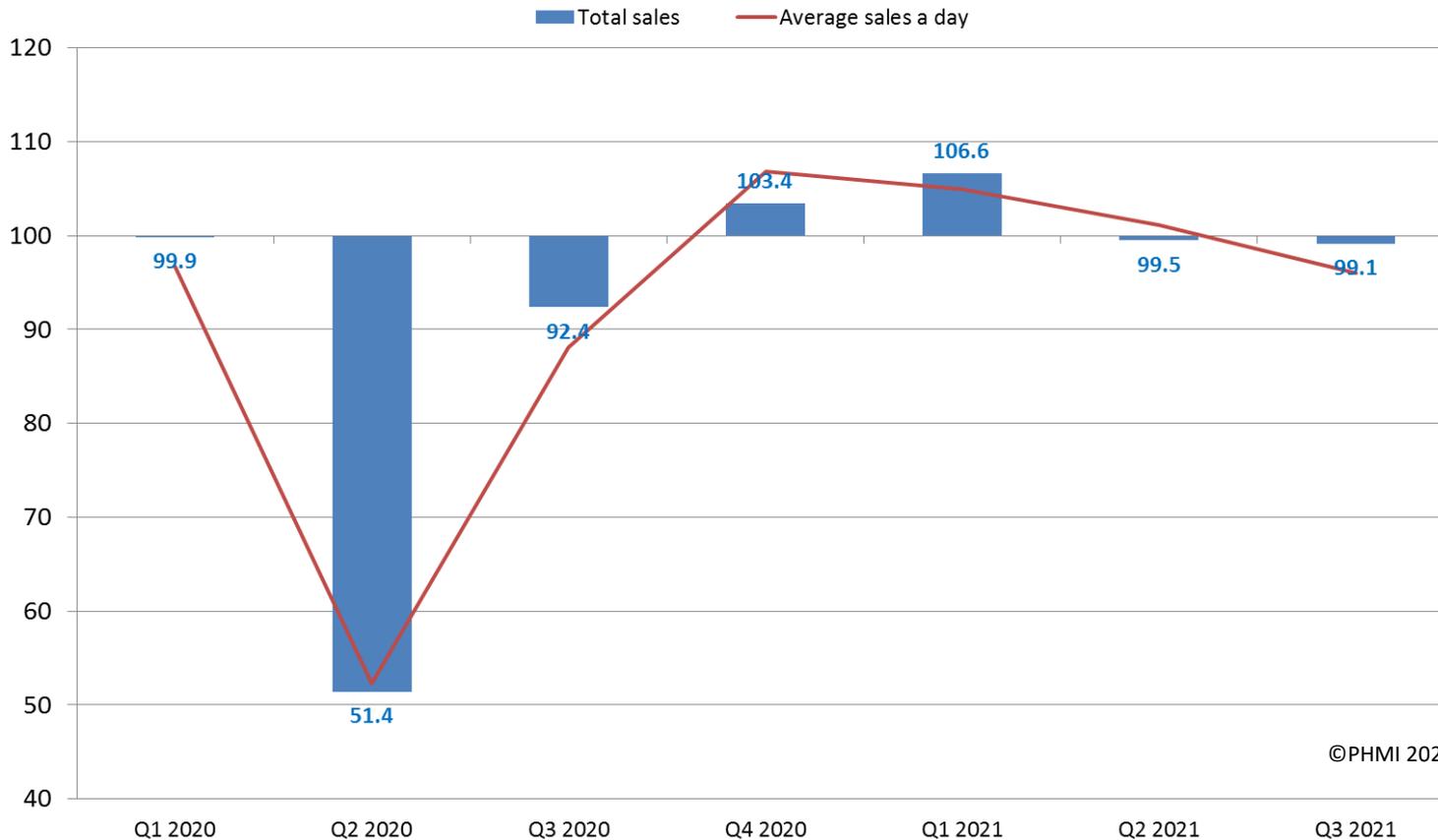
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, September's index of 104.8 means turnover was 4.8% above the base period.
- Values below 100 indicate lower turnover in that period. August's Index of 93.0 means turnover was 7.0% lower than the base period.

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

Quarterly: Index

Adjusted and unadjusted for trading days*

Indices: Q1 2020 to Q3 2021



Value figures
shown for Total
sales

©PHMI 2021

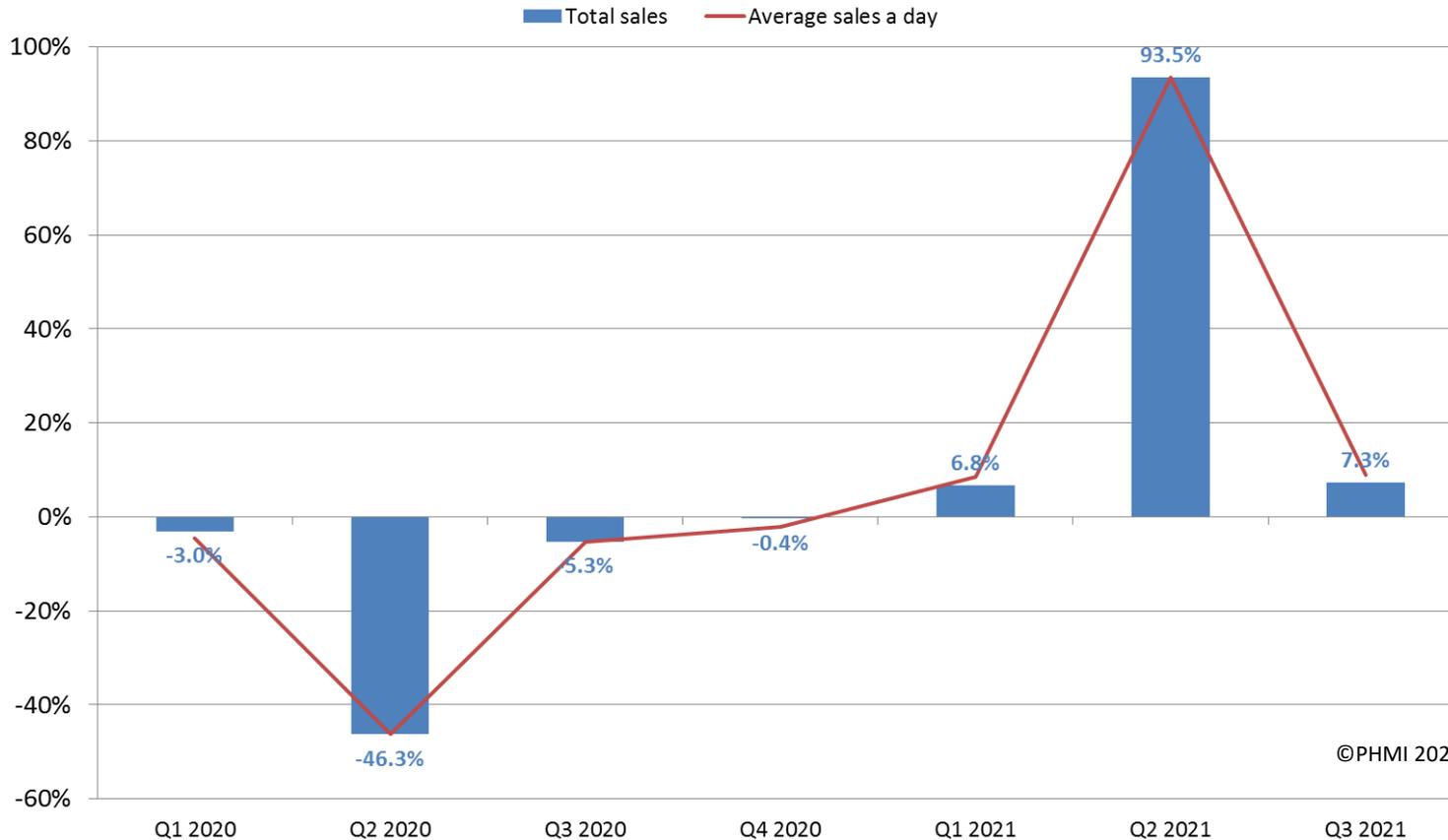
 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Sep 2021

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

Quarterly: Year on Year

Sales indices, adjusted and unadjusted for trading days*

Quarter: year on year



Value figures shown for Total sales

©PHMI 2021

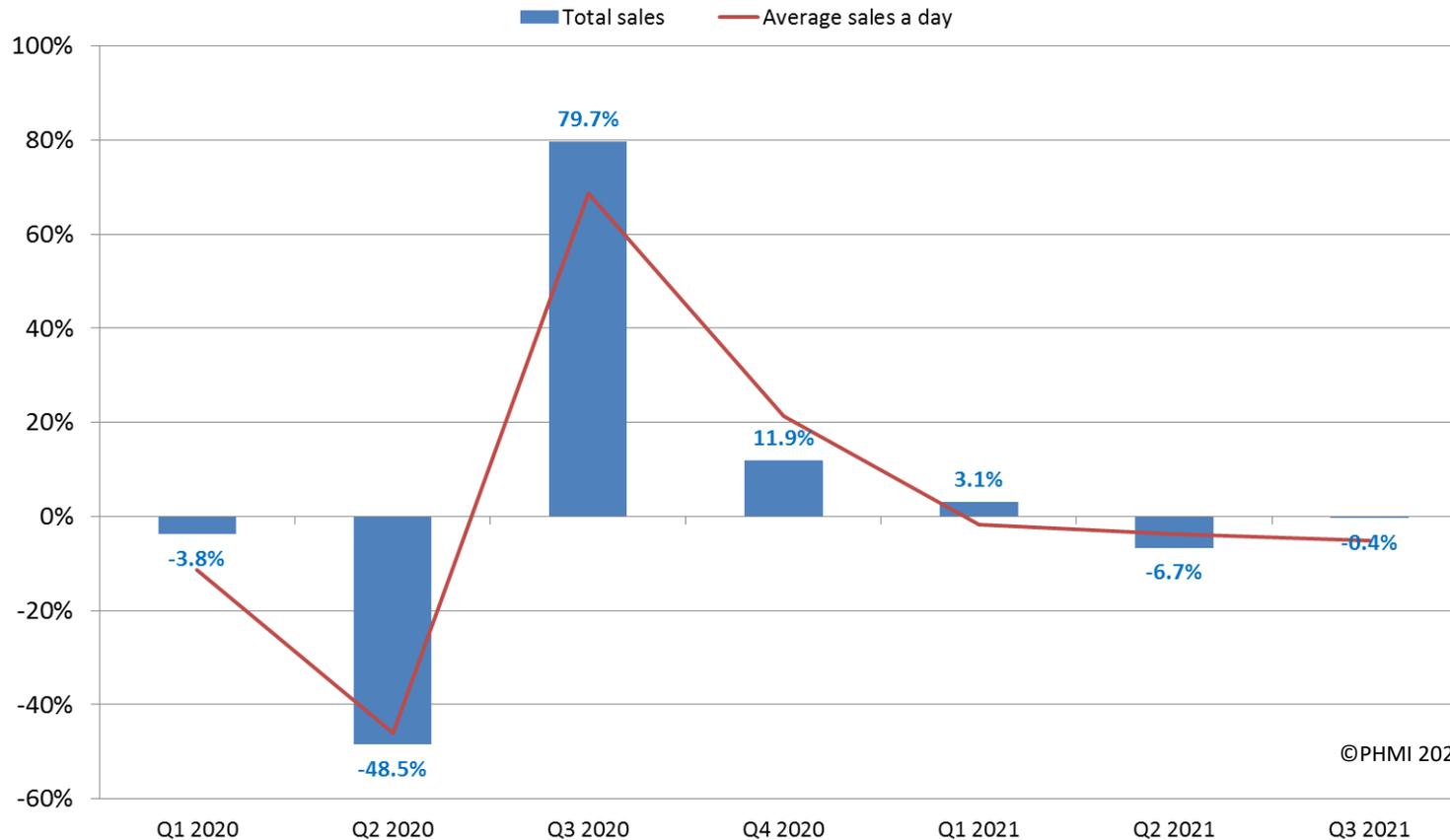
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Sep 2021

*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

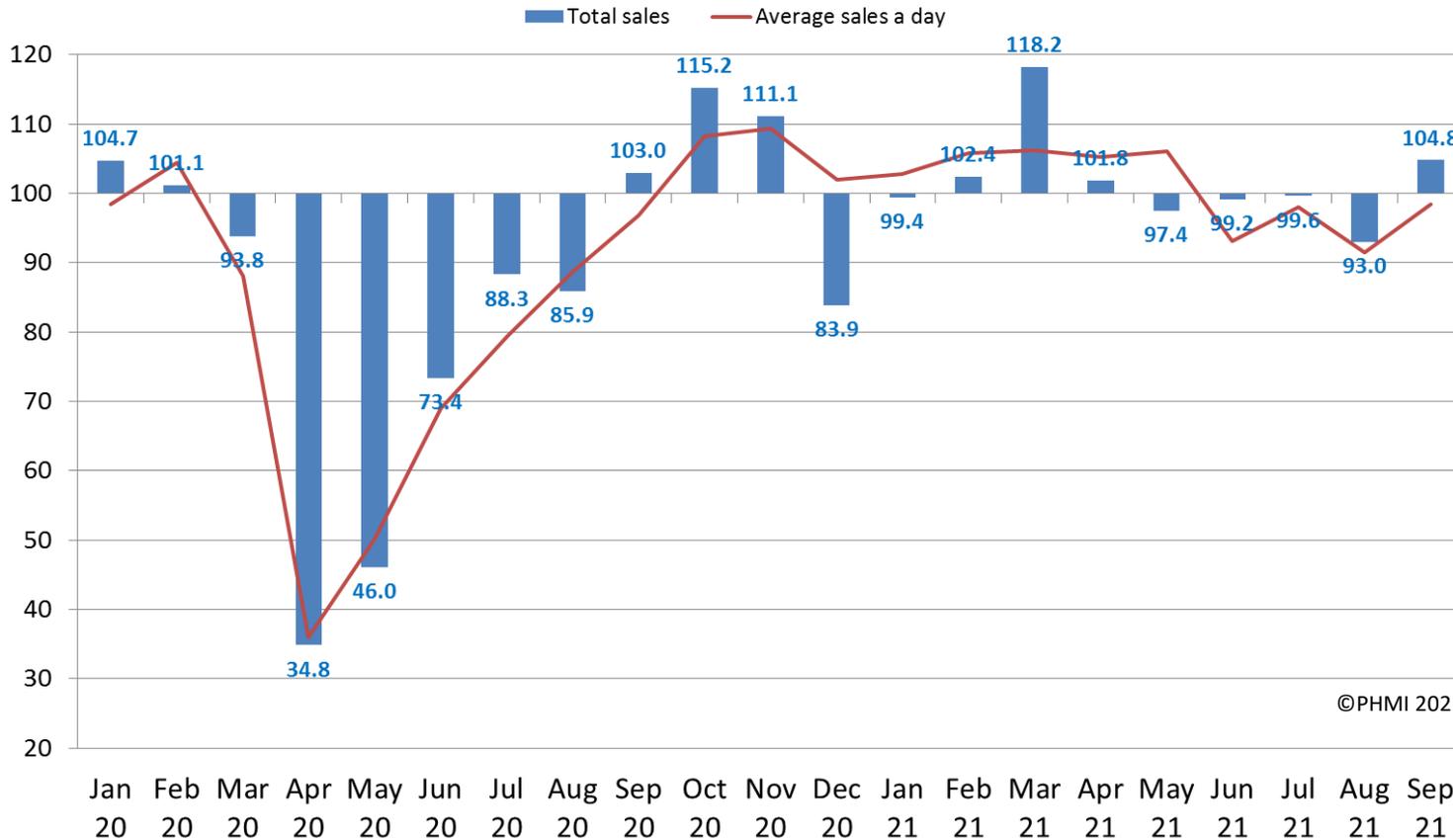
 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Sep 2021

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

Monthly: Index

Adjusted and unadjusted for trading days*

Indices: January 2020 to September 2021



Value figures shown for Total sales

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

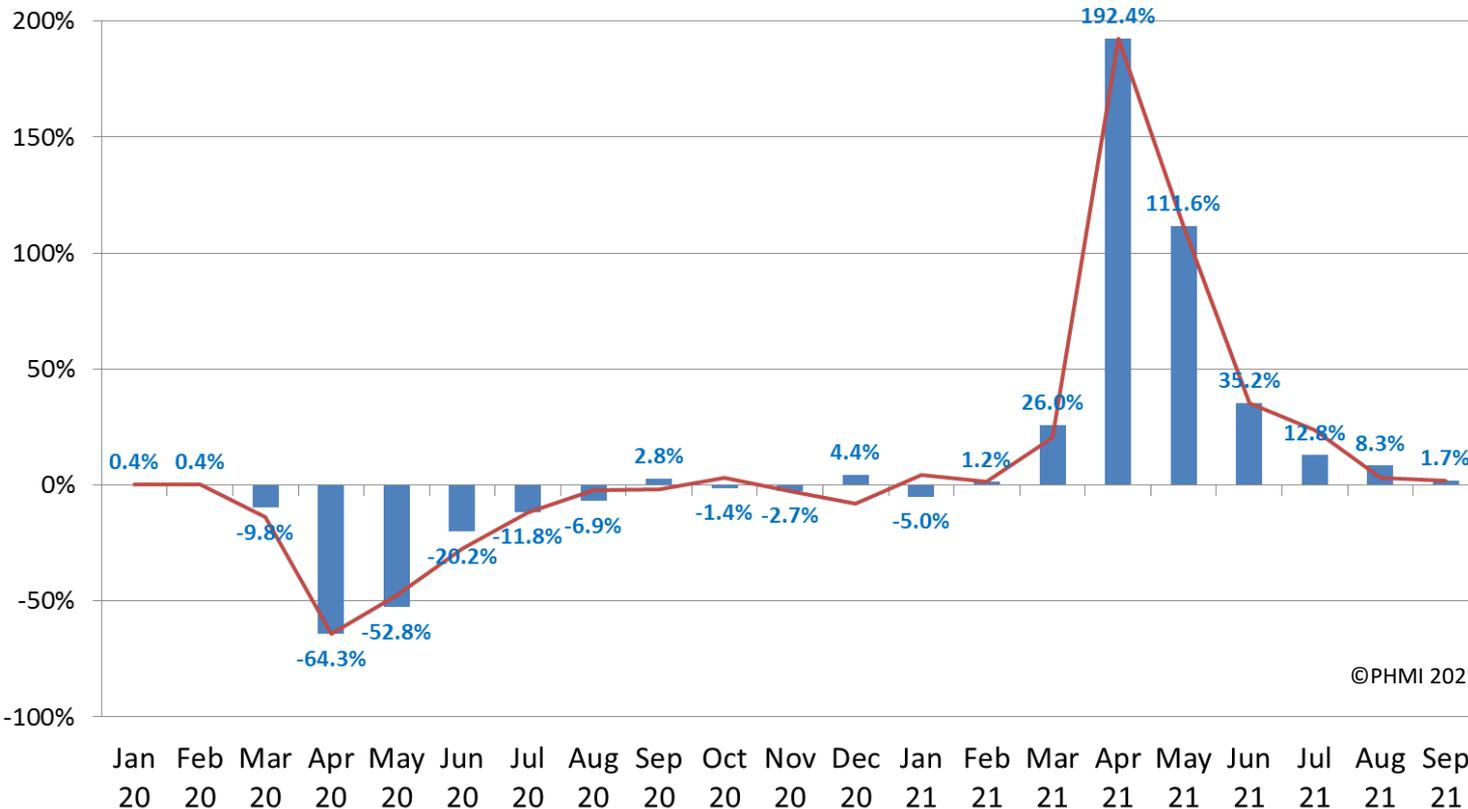
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Monthly: Year on 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

©PHMI 2021

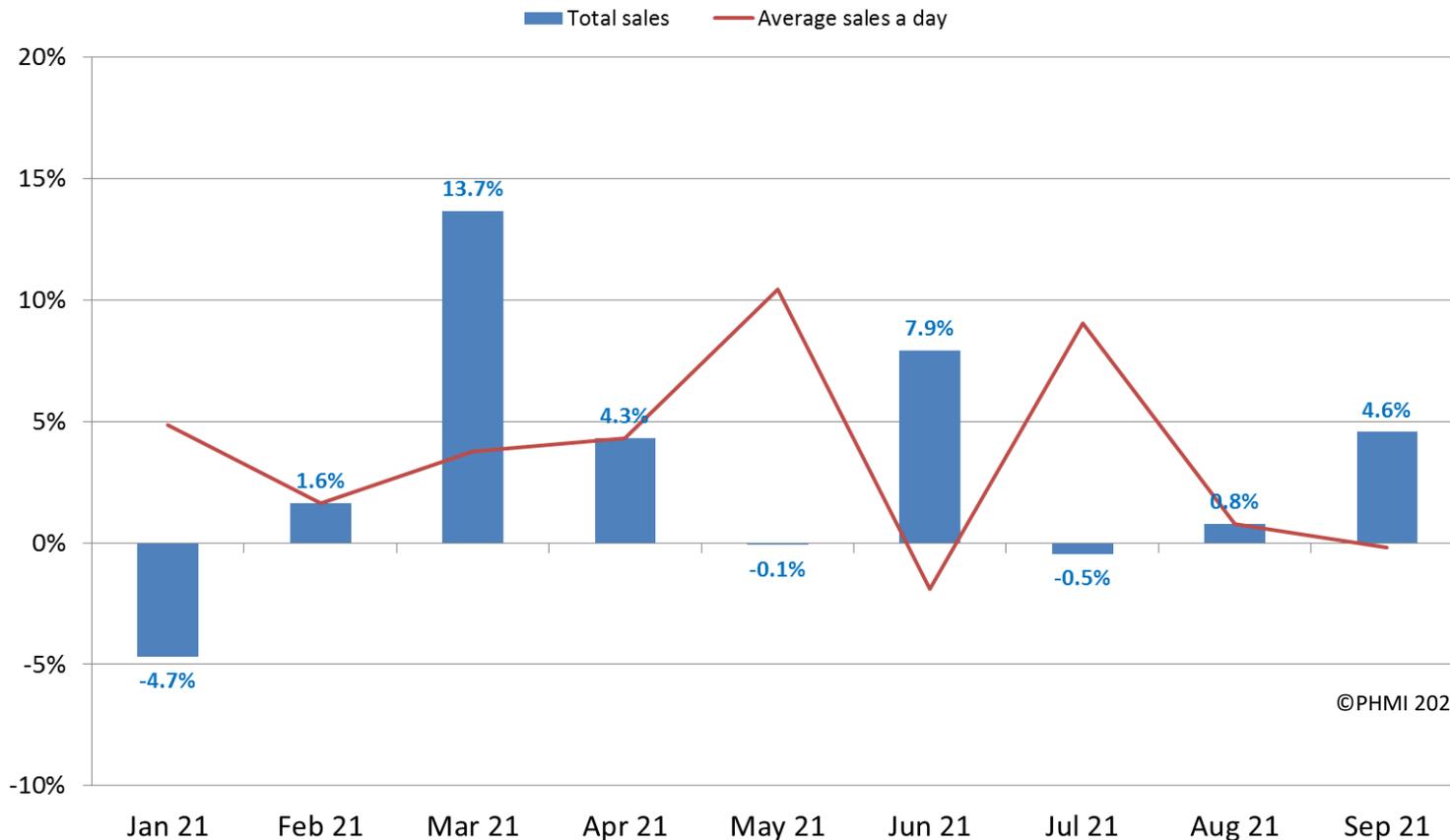
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Sep 2021

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

Monthly: 2021 v 2019

Sales indices, adjusted and unadjusted
for trading days

Month: compared with 2019



Value figures
shown for Total
sales

©PHMI 2021

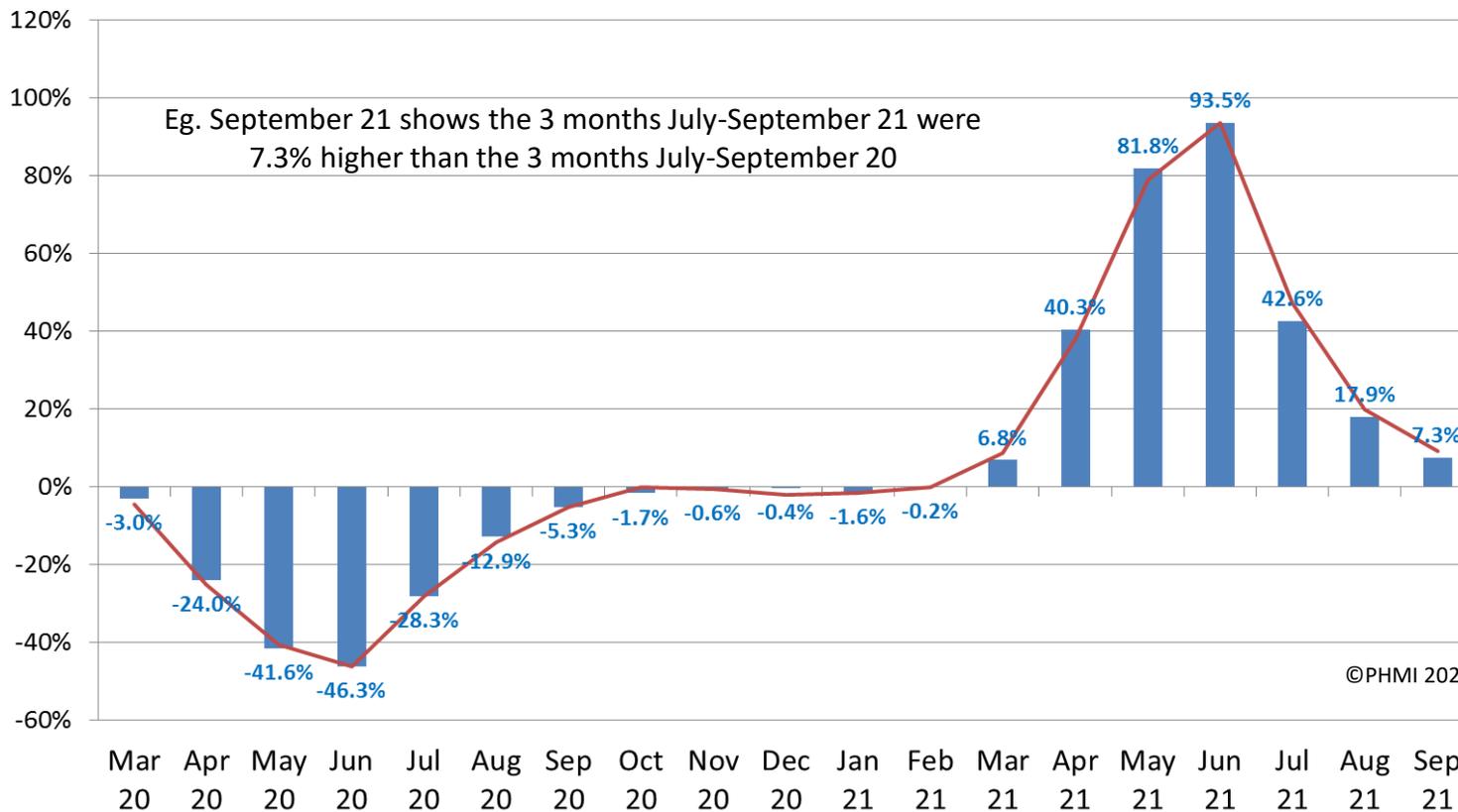
 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Sep 2021

Rolling 3-months: Year on year

Sales indices, adjusted and unadjusted for trading days*

Rolling 3 months: year on year

■ Total sales — Average sales a day



Value figures shown for Total sales

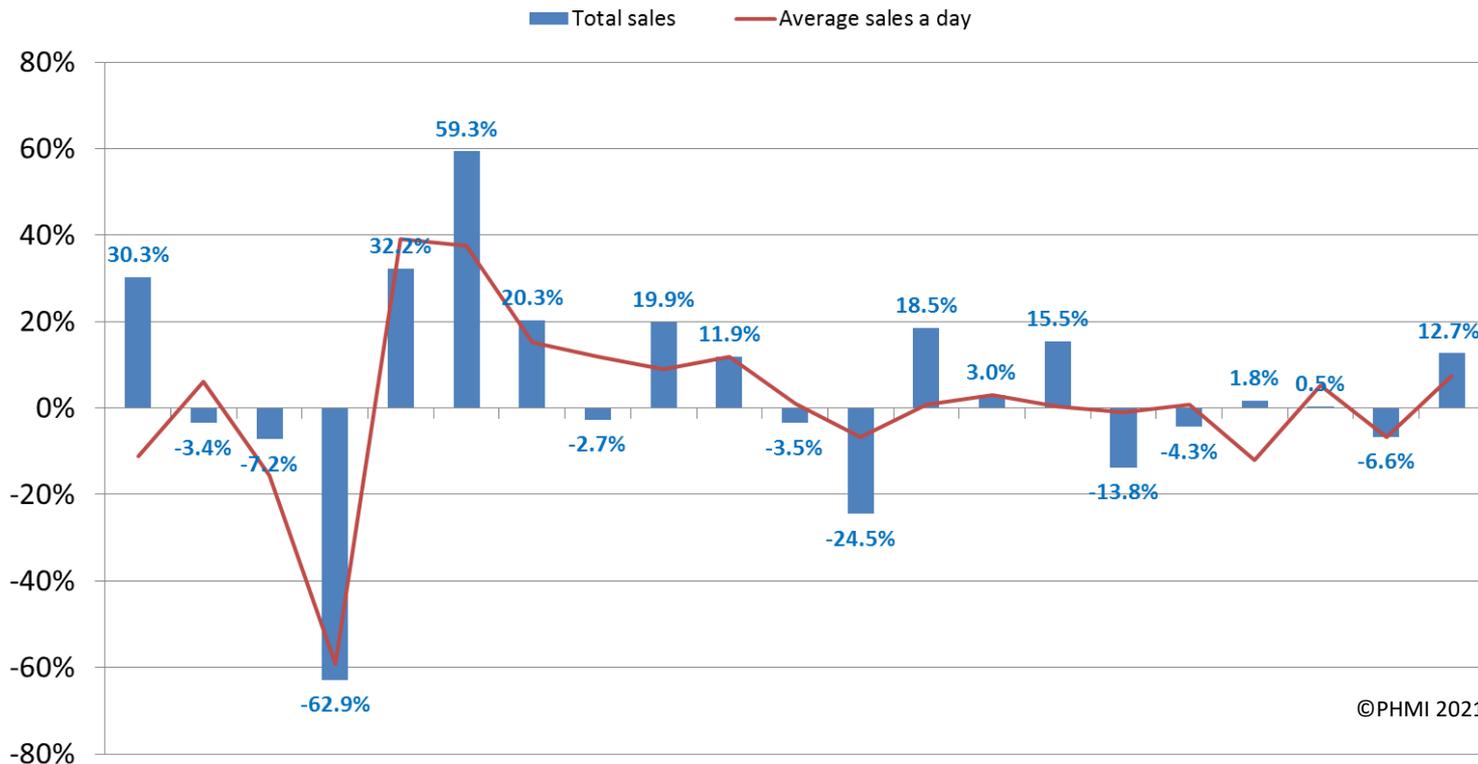
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

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 Sep 21

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

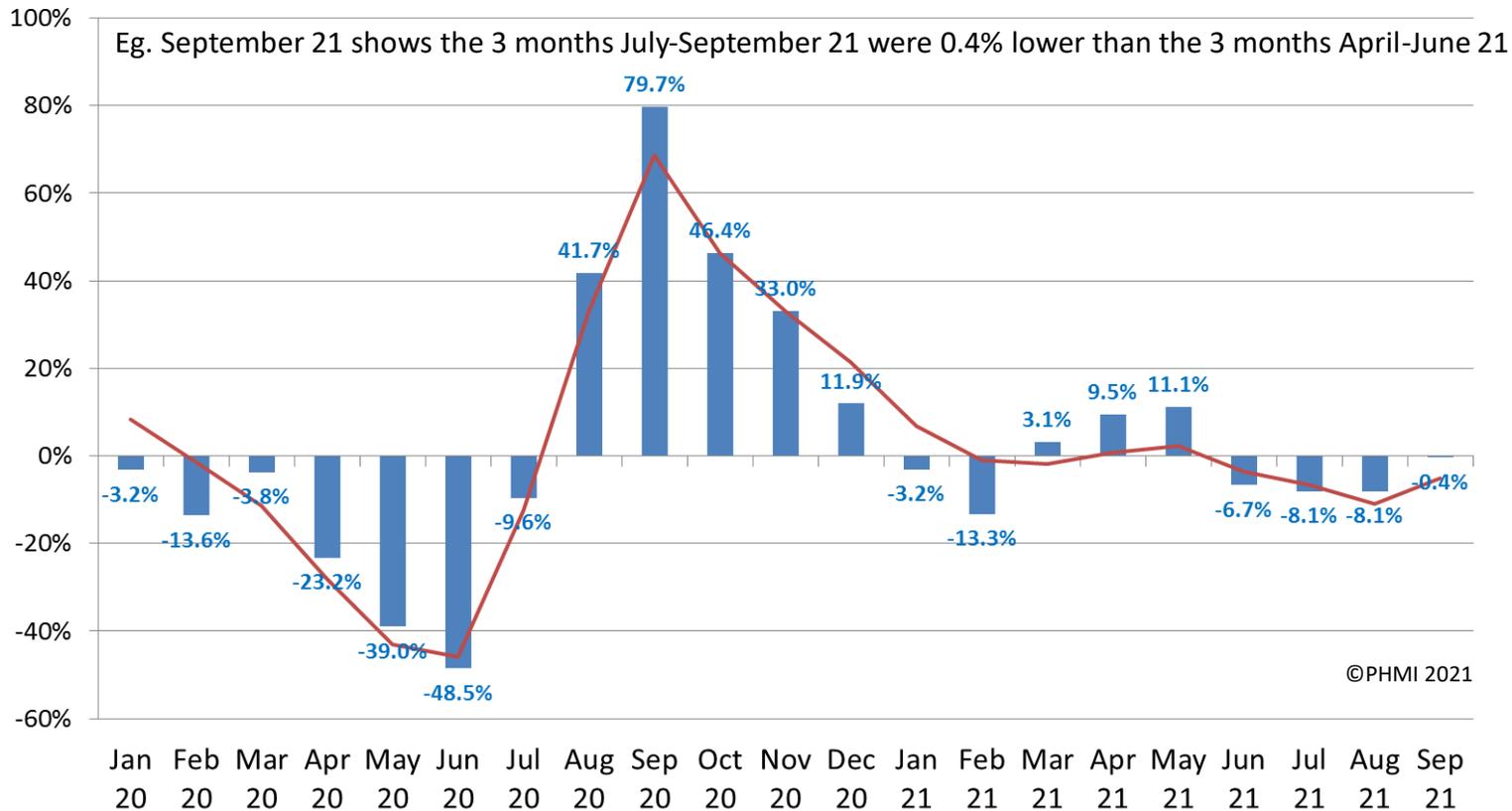
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Sep 2021

Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted for trading days*

Rolling 3 months v previous 3 months

■ Total sales — Average sales a day



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 Sep 2021

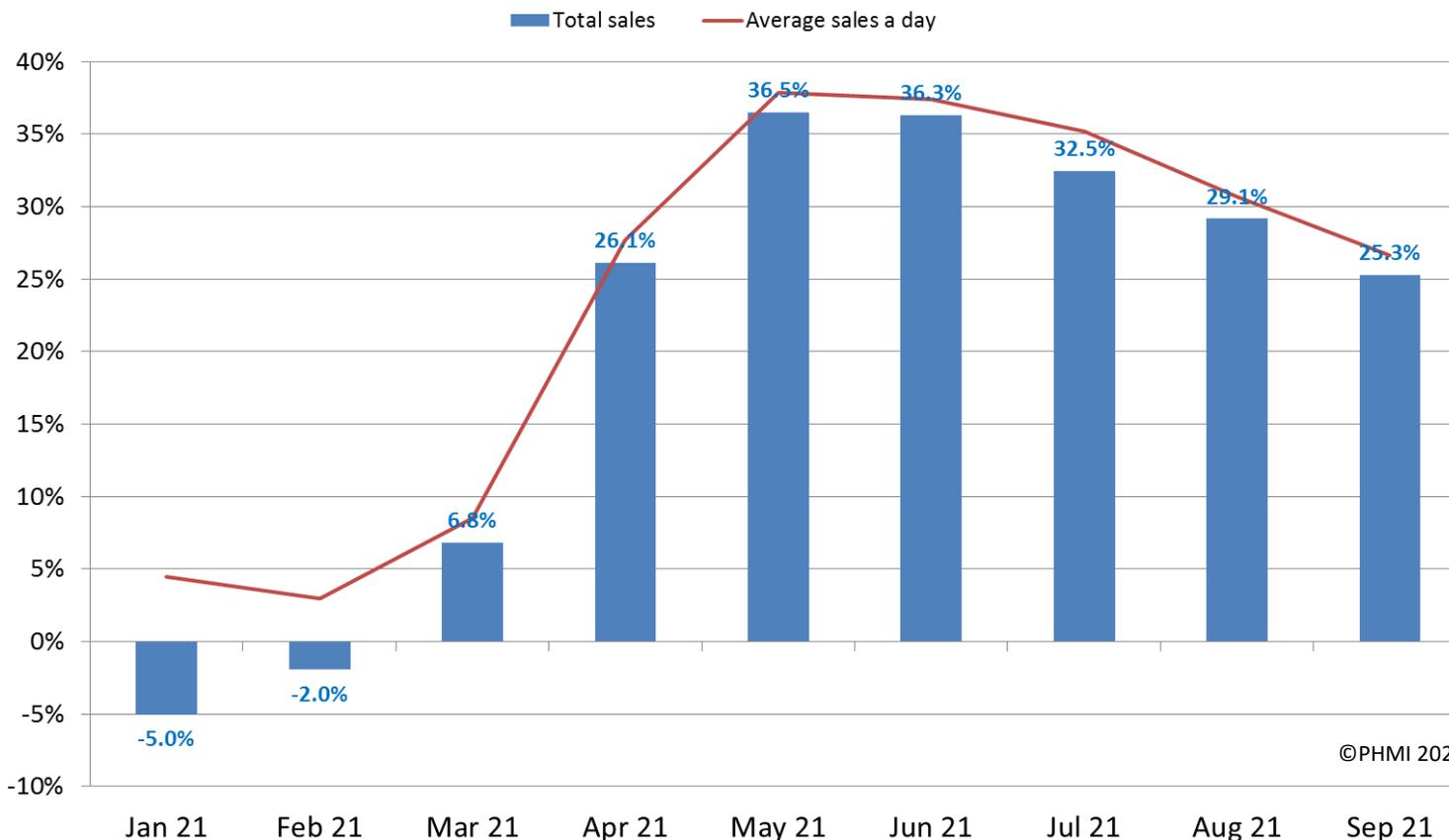
Year To Date: Year on year

Last 9 months sales indices, adjusted and unadjusted for trading days*

Plumbing & Heating Merchant Index



Cumulative year to date: Jan 21 to Sep 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 Sep 2021

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

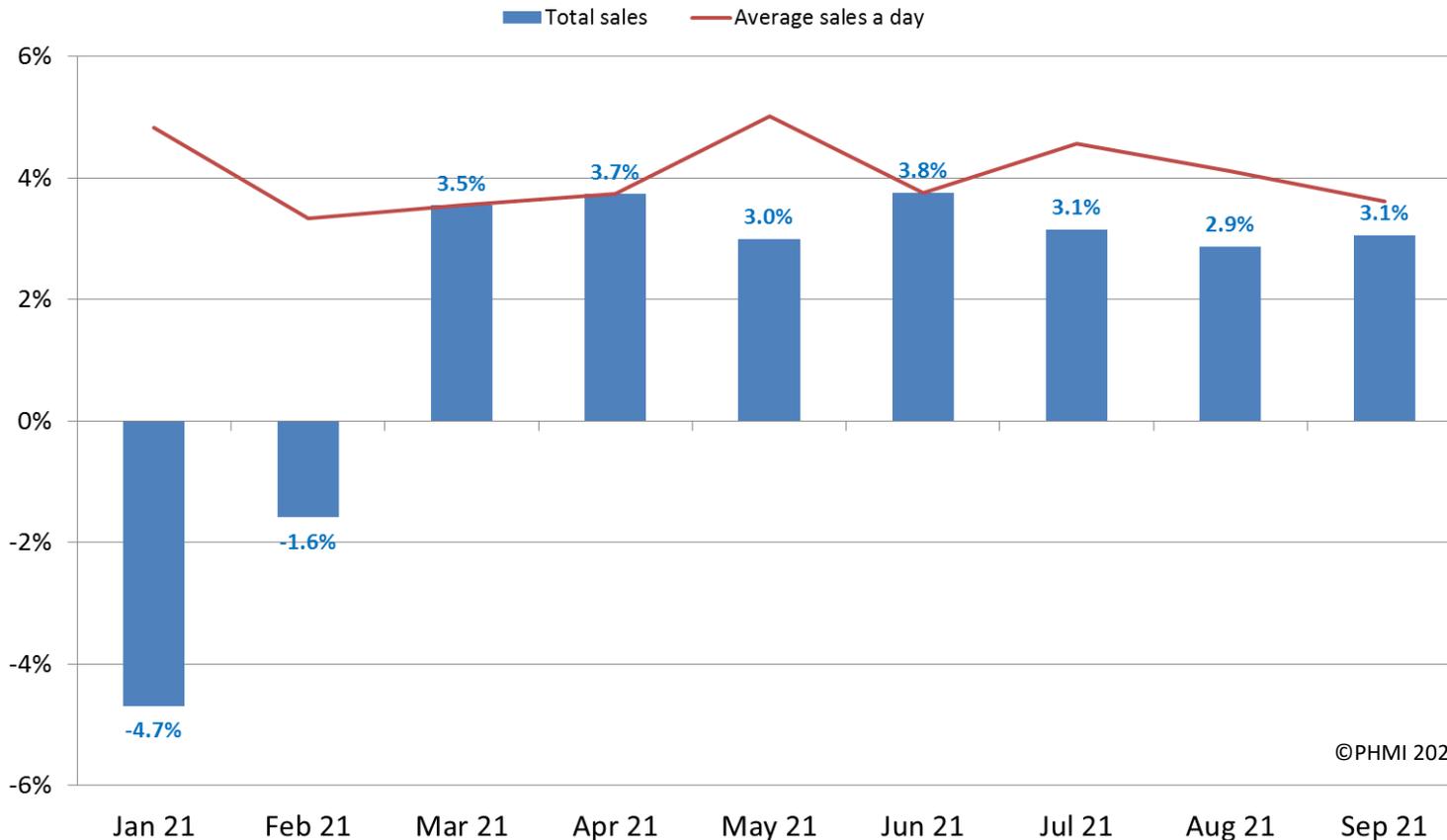
Year To Date: 2021 v 2019

Last 9 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

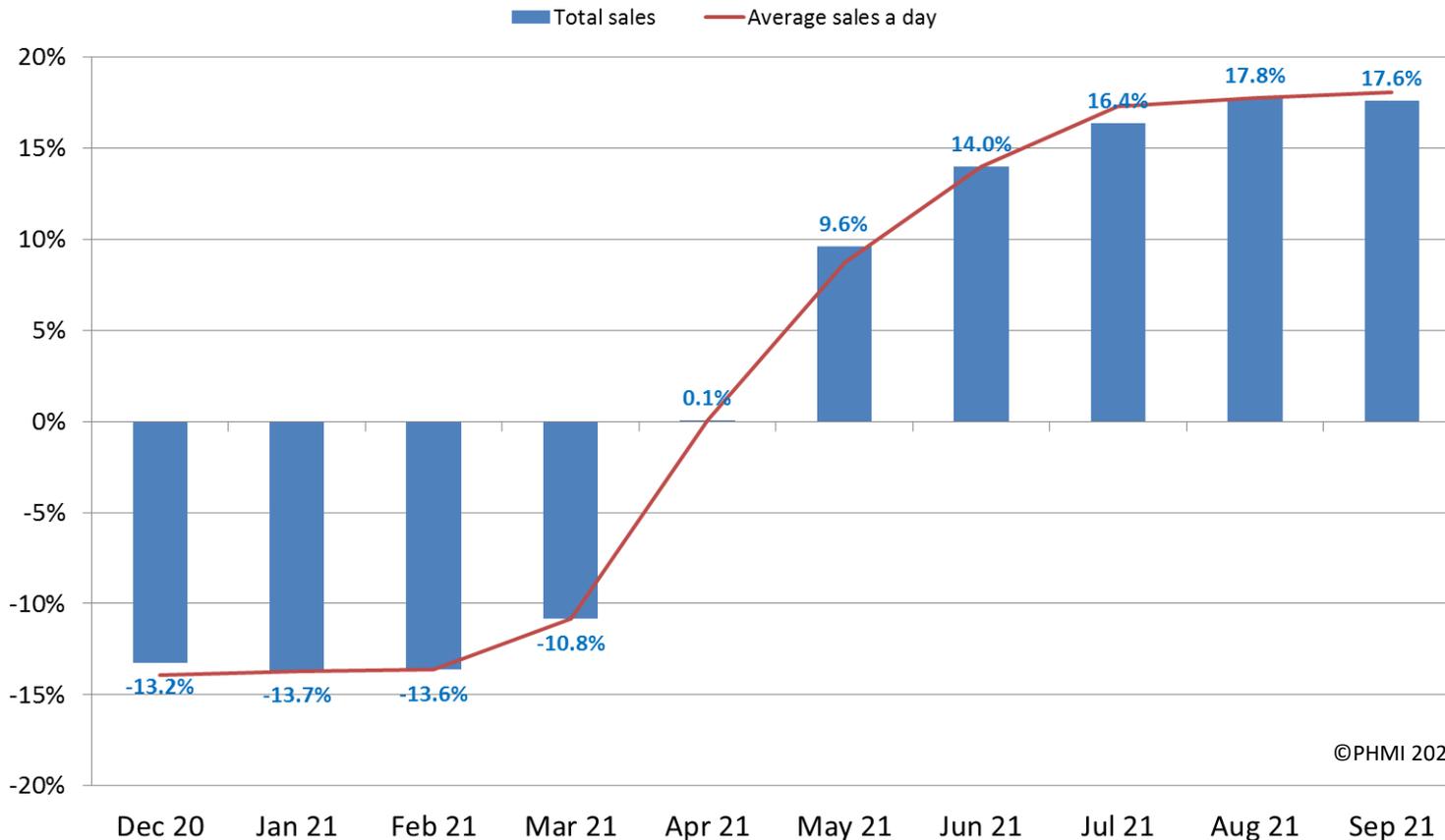
©PHMI 2021

 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Sep 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 Sep 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	22			

Quarterly

Index: 62.3

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

Half Year

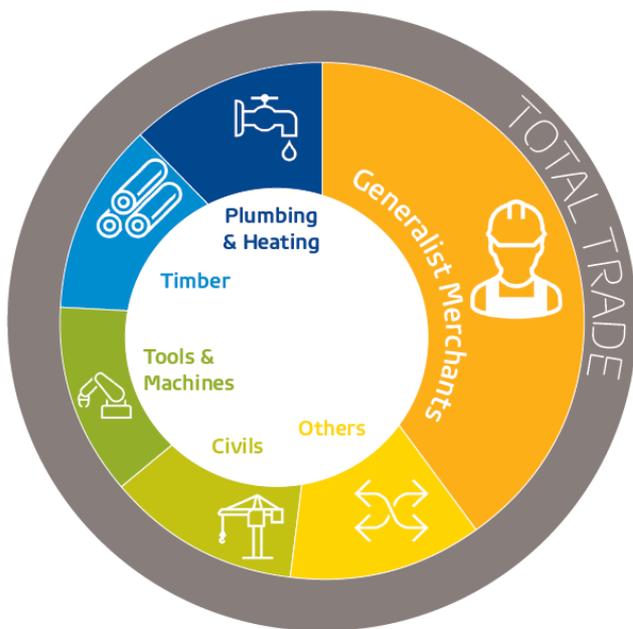
2020	
H1	H2
125	125
2021	
H1	H2
124	

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 Aiken or Ralph Sutcliffe:



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Account Director

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+44(0) 1453 521621



Ralph Sutcliffe

Business Development
Director

ralph@mra-marketing.com

+44 (0) 1453 521621

More data available

The PHMI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you.

GfK can produce like-for-like market comparability tailored to the requirements of an individual business. Merchants or suppliers who are interested in acquiring data or getting involved should contact Emile van der Ryst:



Emile van der Ryst

Senior Client Insight Manager -
Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615

“building **excellence**
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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