

“building **excellence**
in materials supply”

Plumbing & Heating Merchant Index



October 2021

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A Builders Merchant Building Index Publication

Building the Industry & Building Brands from Knowledge

Plumbing & Heating
Merchant Index



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Introduction:

Plumbing & Heating Merchant Index



This Plumbing & Heating Merchant Index (PHMI) report contains data from GfK's ground-breaking Plumbing & Heating Merchants Panel, which analyses data from over 80% of Plumbing & Heating merchants' sales throughout Great Britain, accounting for about £3bn. There is no overlap or double counting between PHMI and Builders Merchant Building Index (BMBI).

GfK's Plumbing & Heating Point of Sale Tracking Data is a gold standard in reliable market trends. Unlike data from sources based on relatively small samples or estimates, or sales from suppliers to the supply chain, this up-to-date data is based on actual sales from specialist plumbing & heating merchants. It is, in effect, the market.

PHMI trend data is indexed on the 12 months of 2019. Currently, data is available by total monthly value sales and the series tracks what is happening in the plumbing and heating market month by month. This trend series gives the industry access to far more accurate insights than has been available. MRA Research produces the Plumbing & Heating Merchant Index, a brand of the BMF (Builders Merchants Federation), to provide reliable data, and a platform and voice for this important industry and for leading plumbing and heating brands to communicate to the wider market.

PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts, speaking for their markets and building their brands, should contact Ralph Sutcliffe: ralph@mra-research.co.uk or Toby Aitken: toby.aitken@mra-research.co.uk

More data available

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

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

October sales up 6.0% on September but 3.5% down on October last year

Total plumbing and heating value sales, from over 80% of specialist Plumbing & Heating merchants throughout Great Britain, were 3.5% lower in October 2021 compared to October 2020 (see [page 61](#)), with one less trading day this year. Like-for-like sales, which take trading day differences into account, were 1.0% higher. Compared with two years ago, total value in October 2021 were 4.9% lower than in October 2019, with two less trading days ([page 62](#)). Like-for-like sales were 4.1% higher.

Total value sales in October were 6.0% higher than in September, with one less trading day this month ([page 63](#)). Like-for-like sales were 11.1% higher.

October's PHMI Index, which contrasts sales with the base period of January to December 2019, was 111.1 – see the table on [page 59](#) and the chart on [page 60](#). The PHMI Index for the last three months (June to August) was slightly lower (103.0).

Sales in the three months August to October 2021 were up 1.6% compared with the same three months last year, with no difference in trading days ([page 64](#)).

Compared with the same months two years ago, total sales in the three months August to October 2021 were flat (-0.1%), with one less trading day this year. Like-for-like sales increased by 1.4%.

Sales in August to October were 4.3% higher than in the preceding three months, May to July, with two more trading day in the most recent period ([page 65](#)). Like-for-like sales were up 1.0%.

Sales in the first ten months of 2021 were 21.4% higher than in Covid-affected January to October 2020, with three less trading days this year ([page 69](#)). Like-for-like sales were 23.1% higher.

Looking back two years, sales in January to October 2021 were 2.1% higher than the same ten months in 2019, with three less trading days this year ([page 70](#)). Like-for-like sales were 3.6% higher.

Plumbing & Heating Merchants' sales in the 12 months November 2020 to October 2021 were 17.4% ahead of November 2019 to October 2020, with one less trading day in the most recent period ([page 71](#)). Like-for-like sales increased by 17.9%.

Sales in October were 3.5% less than last year and 4.9% below October 2019. In the three months August to October, sales increased by 1.6% on 2020 but were flat (-0.1%) compared with 2019.

Indices: Monthly and quarterly

November 2020 to October 2021

(Indexed on January to December 2019)

Nov 20	Dec 20	Jan 21	Three months
111.1	83.9	99.4	98.1
Feb 21	Mar 21	Apr 21	Three months
102.4	118.2	101.8	107.5
May 21	Jun 21	Jul 21	Three months
97.4	99.2	99.6	98.7
Aug 21	Sep 21	Oct 21	Three months
93.0	104.8	111.1	103.0

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, October' index of 111.1 means turnover was 11.1% 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.

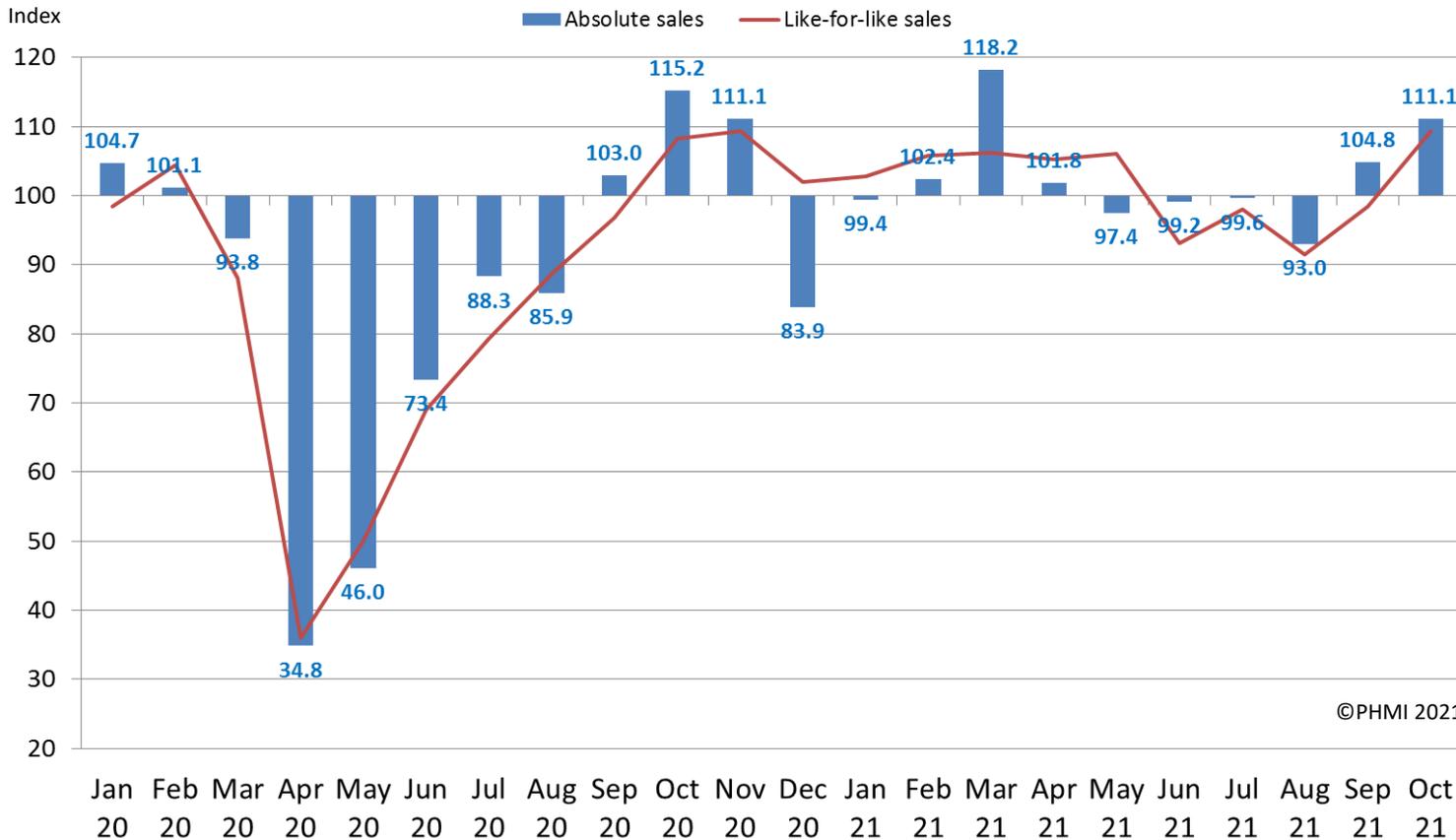
 **Source:** GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Oct 2021

Monthly: Index

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Indices: January 2020 to October 2021



Values shown for Total sales

©PHMI 2021

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

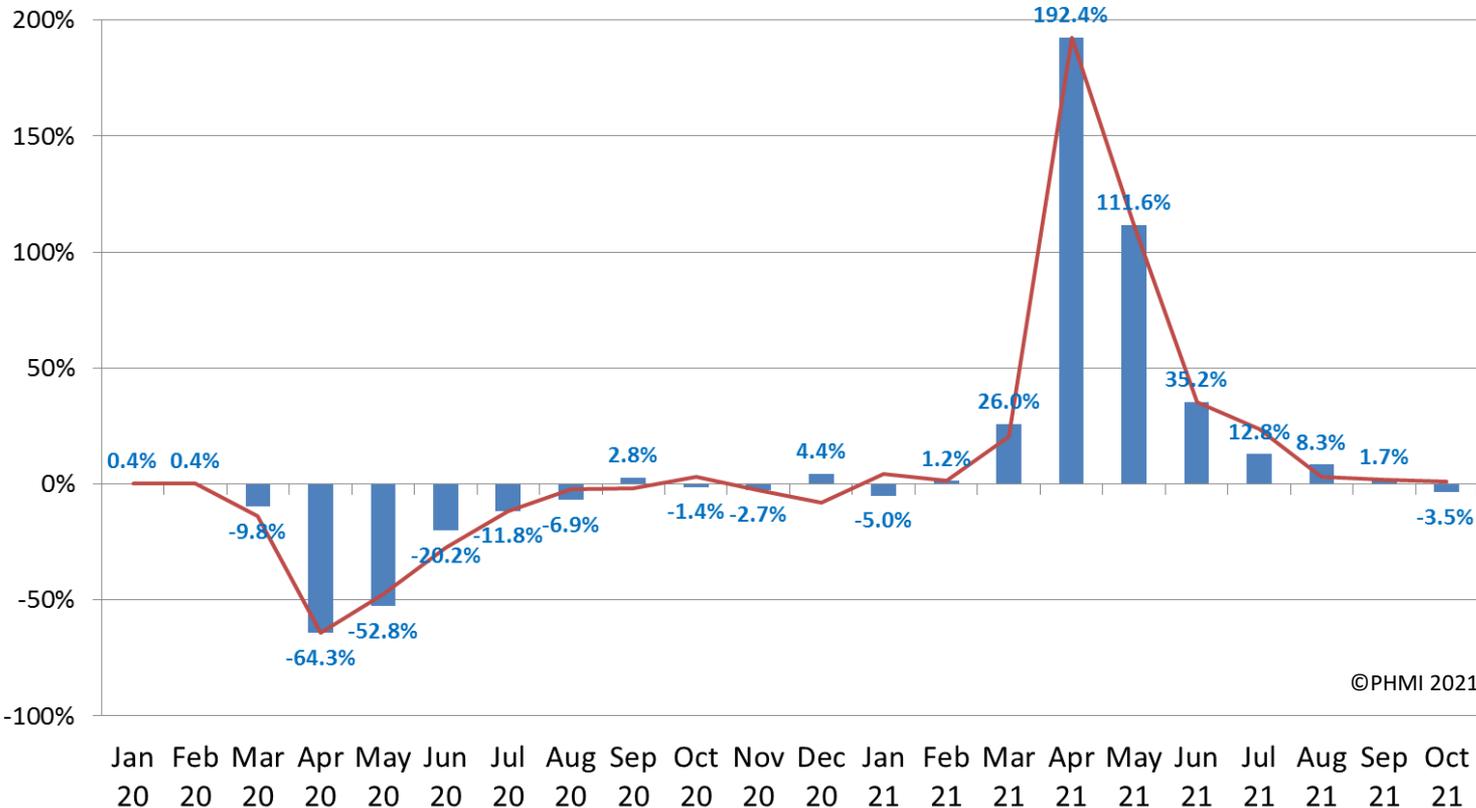
Monthly: This Year v Last Year

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Month: year on year

■ Absolute sales — Like-for-like sales



Values shown for Total sales

©PHMI 2021

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

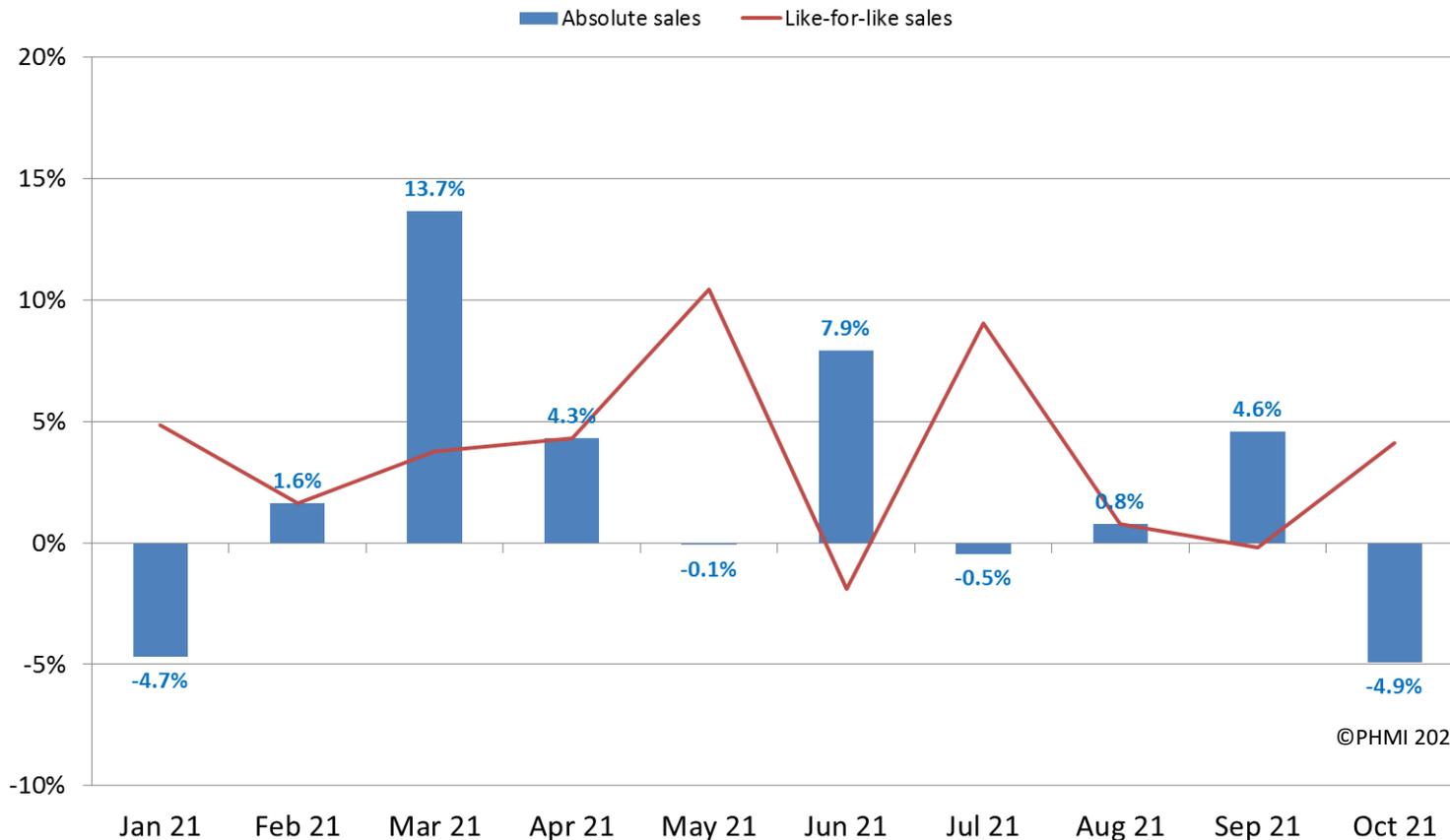
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Monthly: This Year v 2019

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Month: compared with 2019



Values shown
for Total sales

©PHMI 2021

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

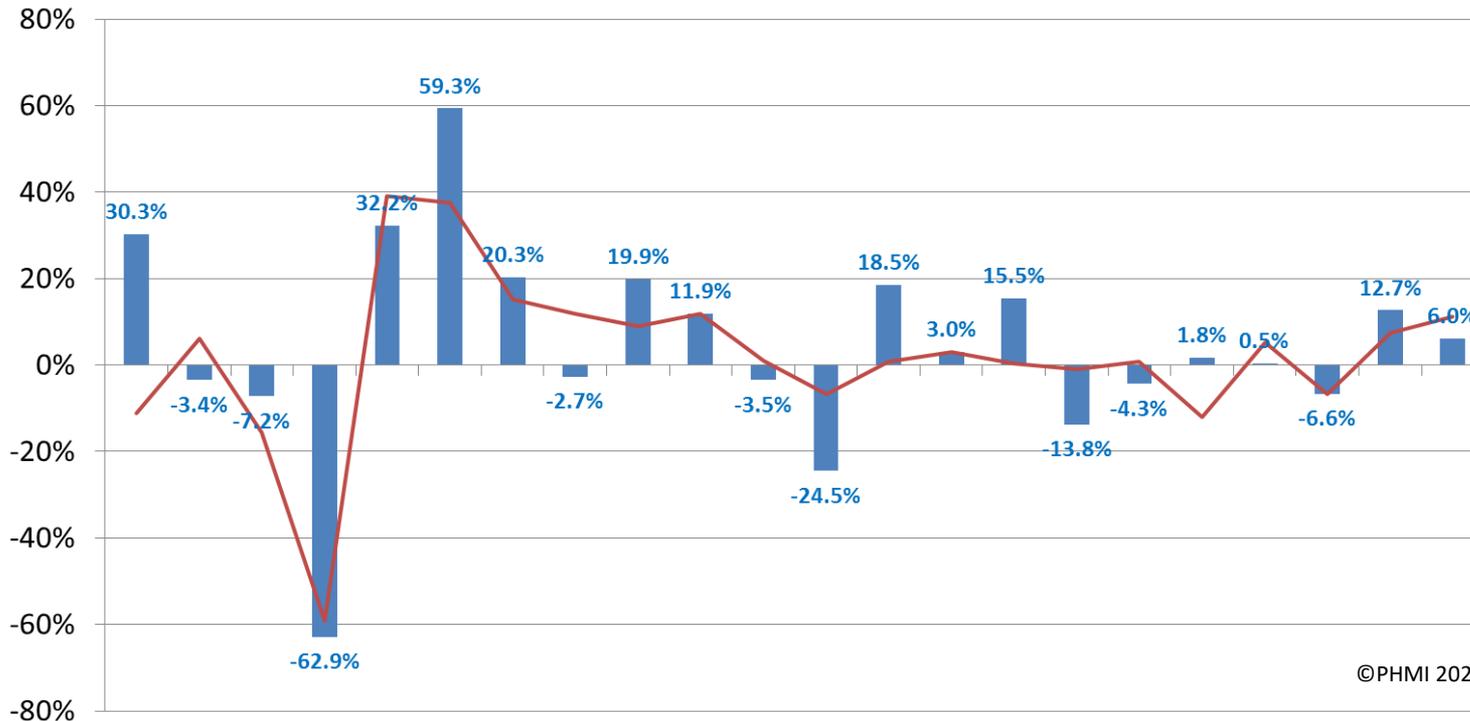
Monthly: Month v previous month

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Month v previous month

■ Absolute sales — Like-for-like sales



Values shown for Total sales

©PHMI 2021

Jan 20 20 Feb 20 20 Mar 20 20 Apr 20 20 May 20 20 Jun 20 20 Jul 20 20 Aug 20 20 Sep 20 20 Oct 20 20 Nov 20 20 Dec 20 20 Jan 20 21 Feb 20 21 Mar 20 21 Apr 20 21 May 20 21 Jun 20 21 Jul 20 21 Aug 20 21 Sep 20 21 Oct 20 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 Oct 2021

Rolling 3-months: This year v last year

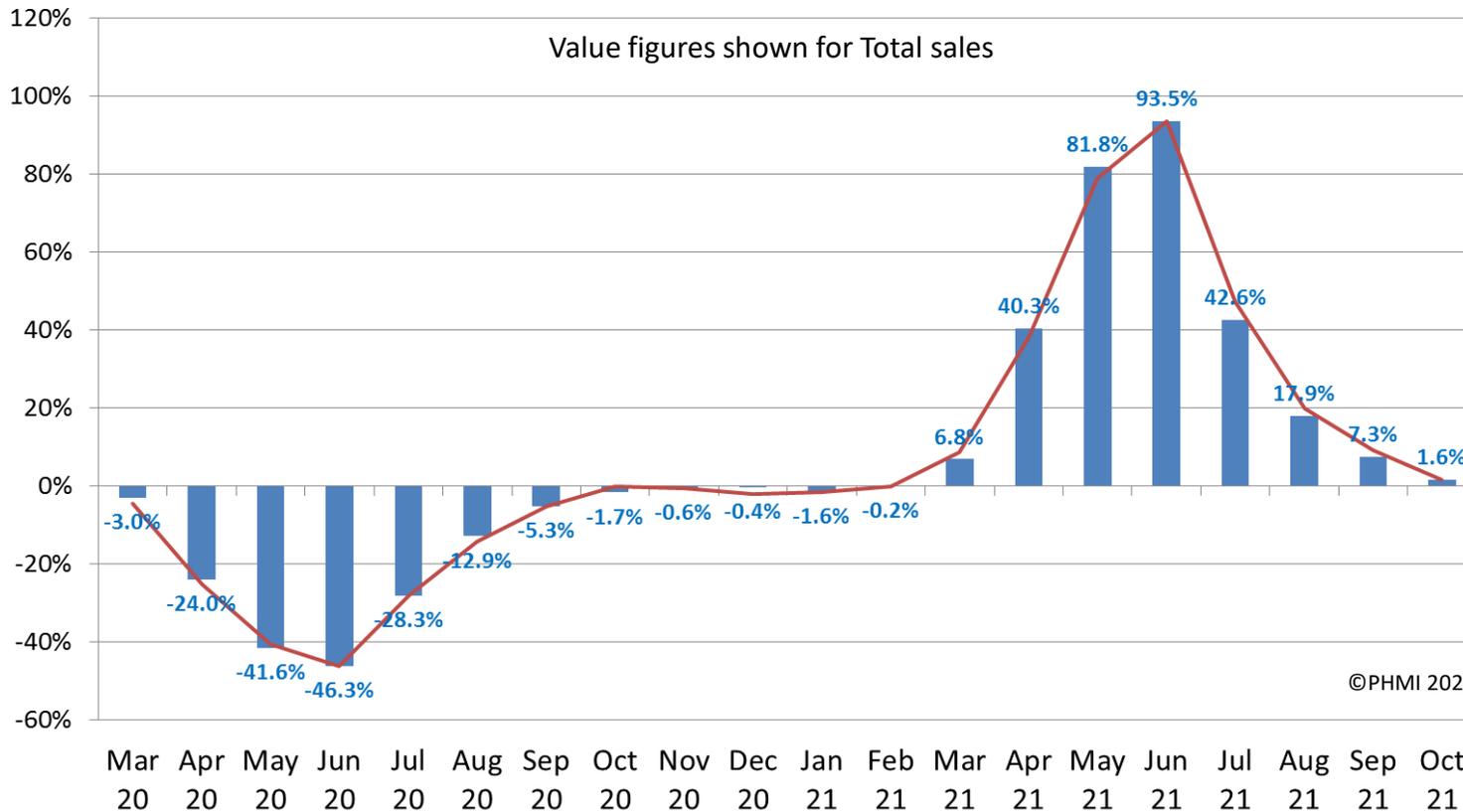
Absolute sales index and like-for-like sales index*



(Like-for-like sales take trading day differences into account)

Rolling 3 months: year on year

Absolute sales Like-for-like sales



Eg. October 21 shows sales in the three months August to October were 1.6% higher than the same three months last year.

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

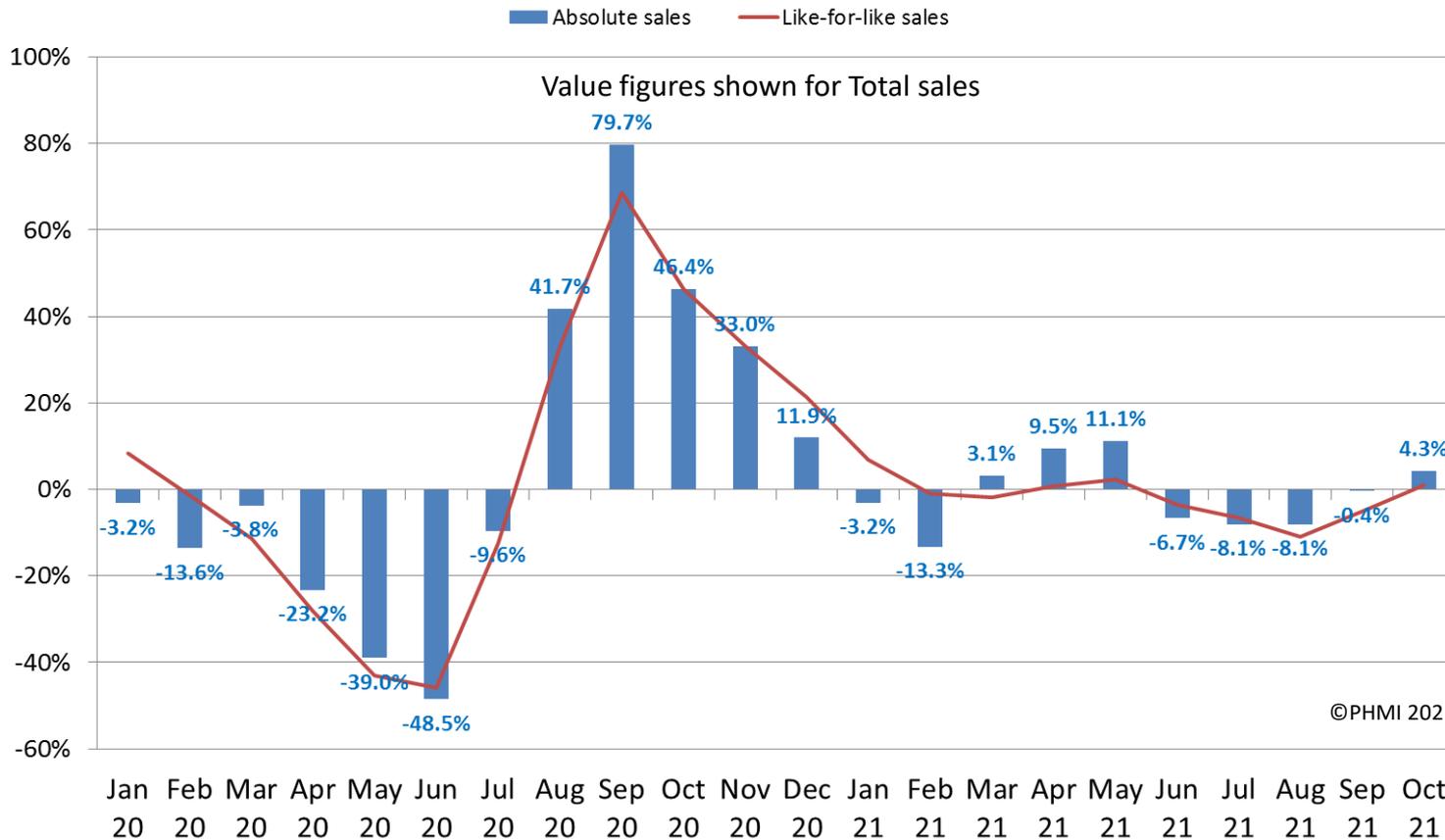
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Rolling 3-months: v previous 3 months

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Rolling 3 months v previous 3 months



Eg. October 21 shows the three months August to October were 4.3% higher than the three months May to July.

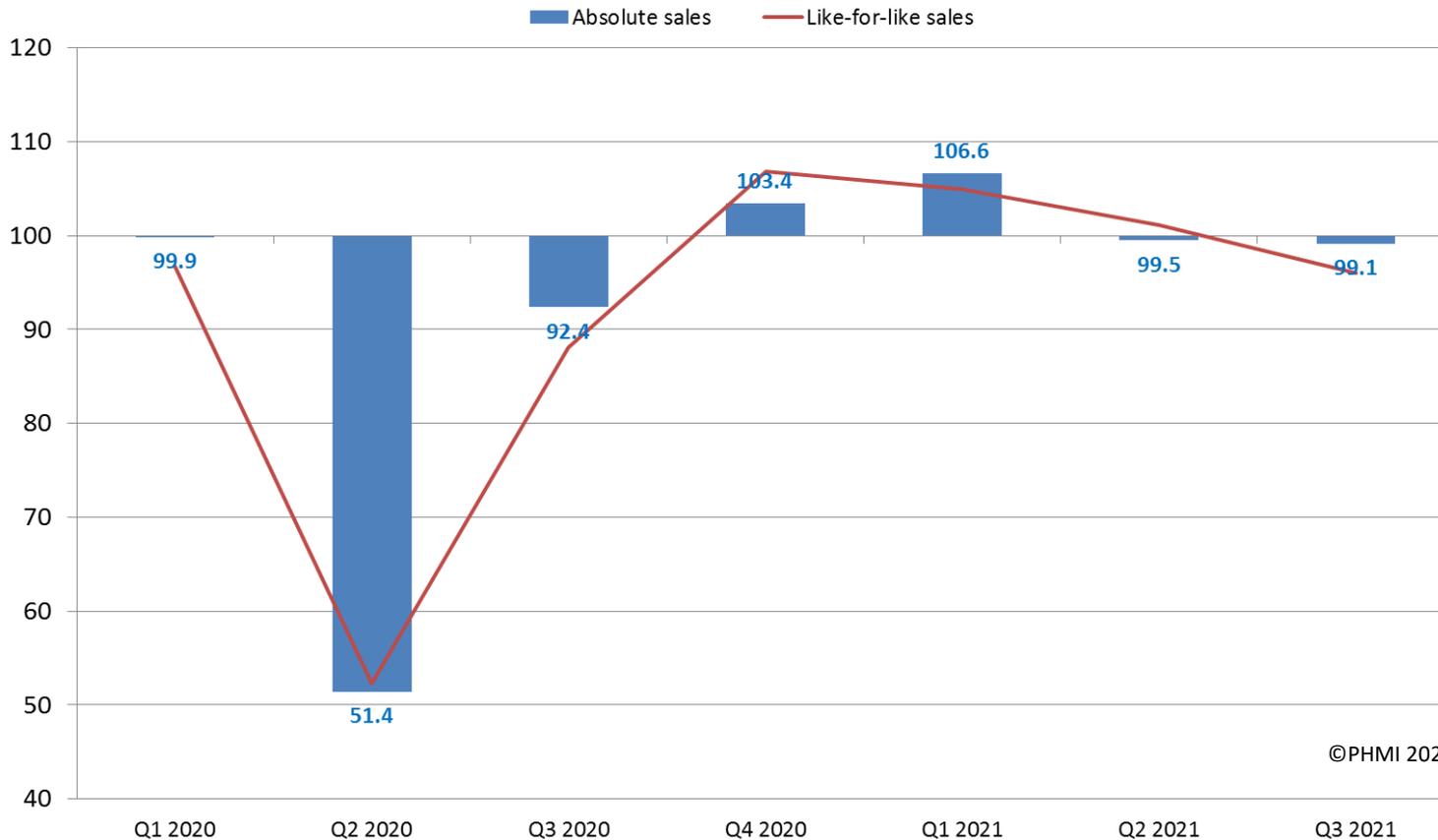
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Oct 2021

Quarterly: Index

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

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

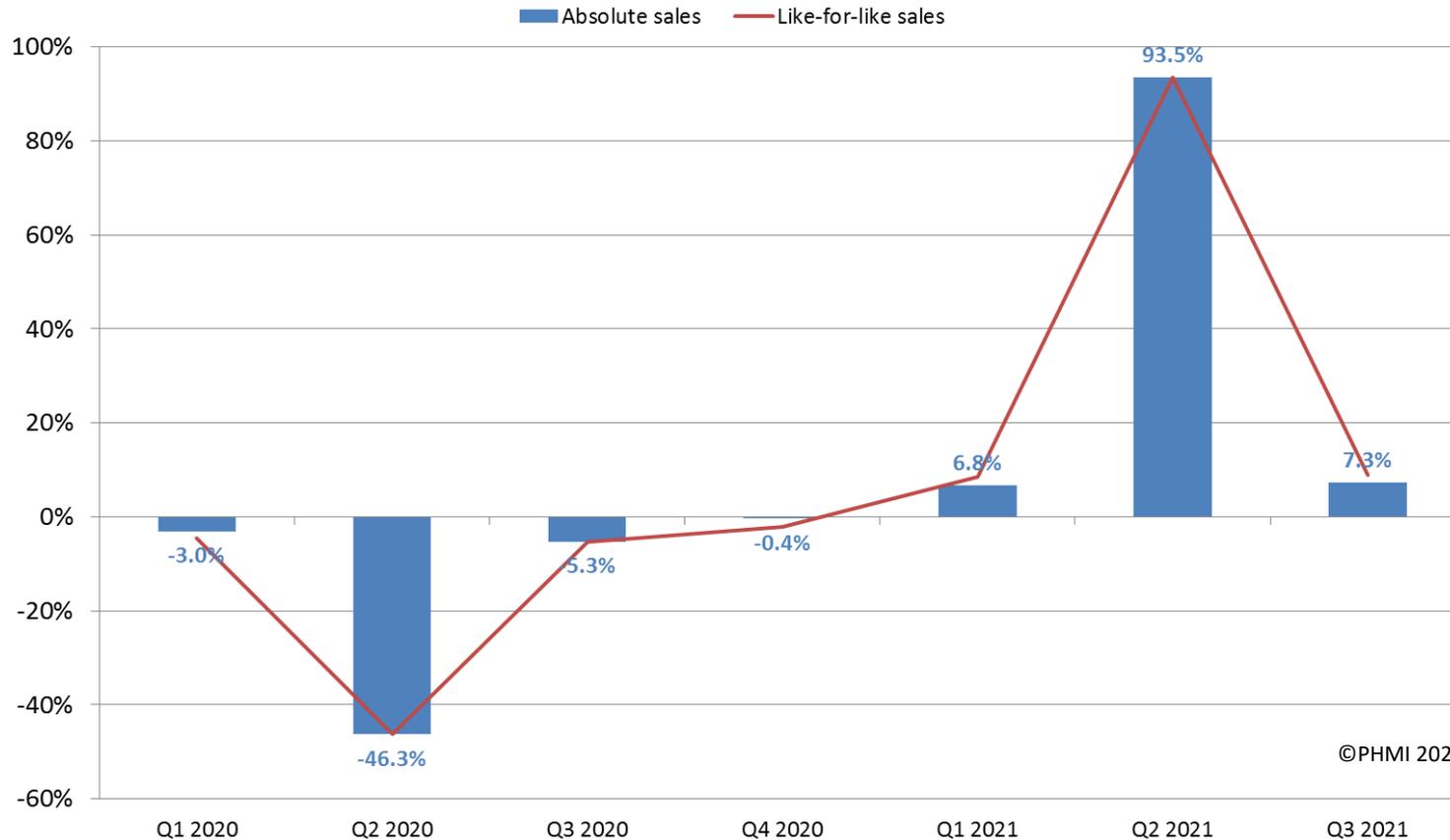
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Quarterly: Year on Year

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

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

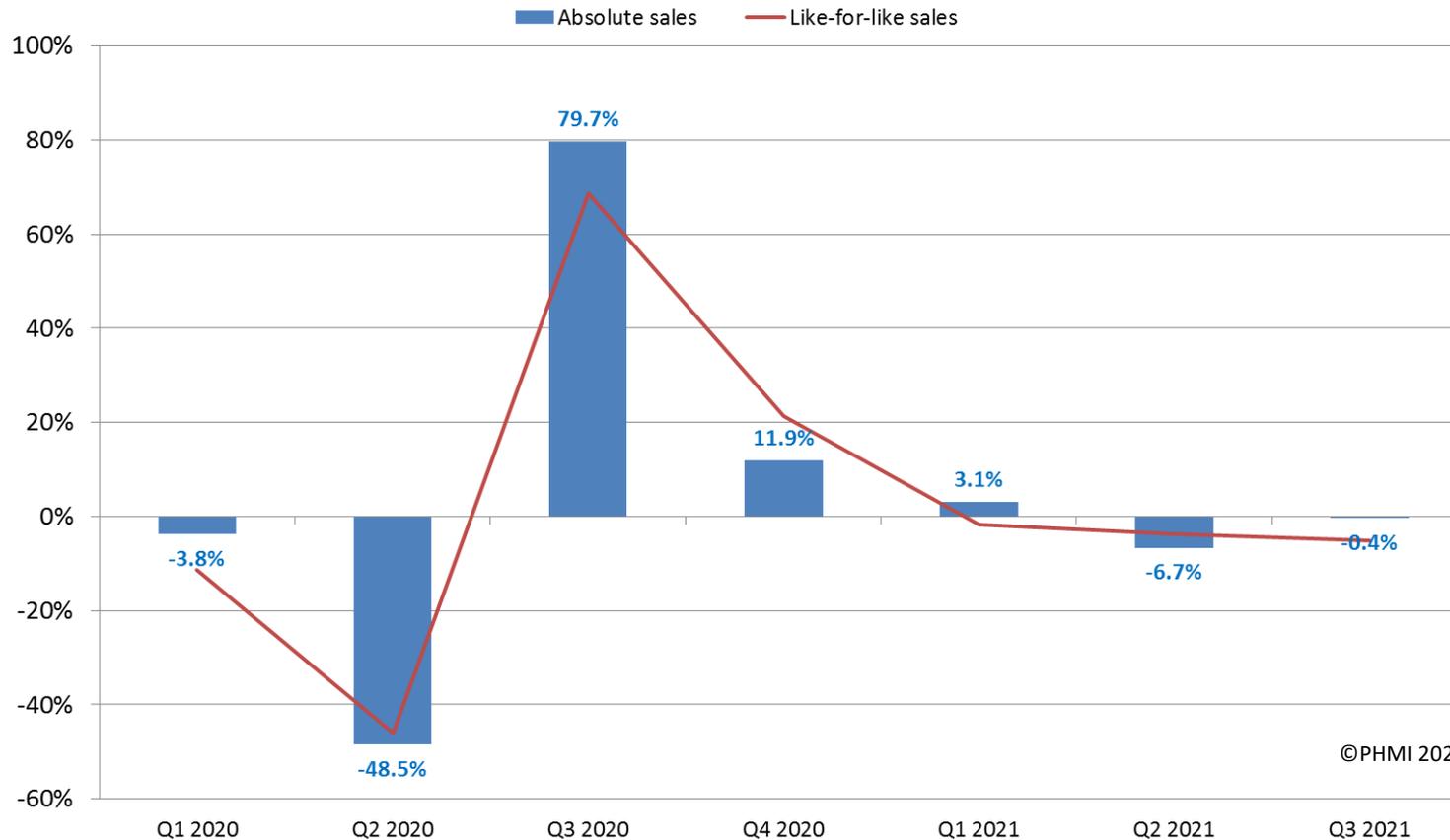
Absolute sales index and like-for-like sales index*

Plumbing & Heating
Merchant Index



(Like-for-like sales take trading day differences into account)

Quarter v previous quarter



Value figures
shown for Total
sales

©PHMI 2021

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

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

Year To Date: Year on year

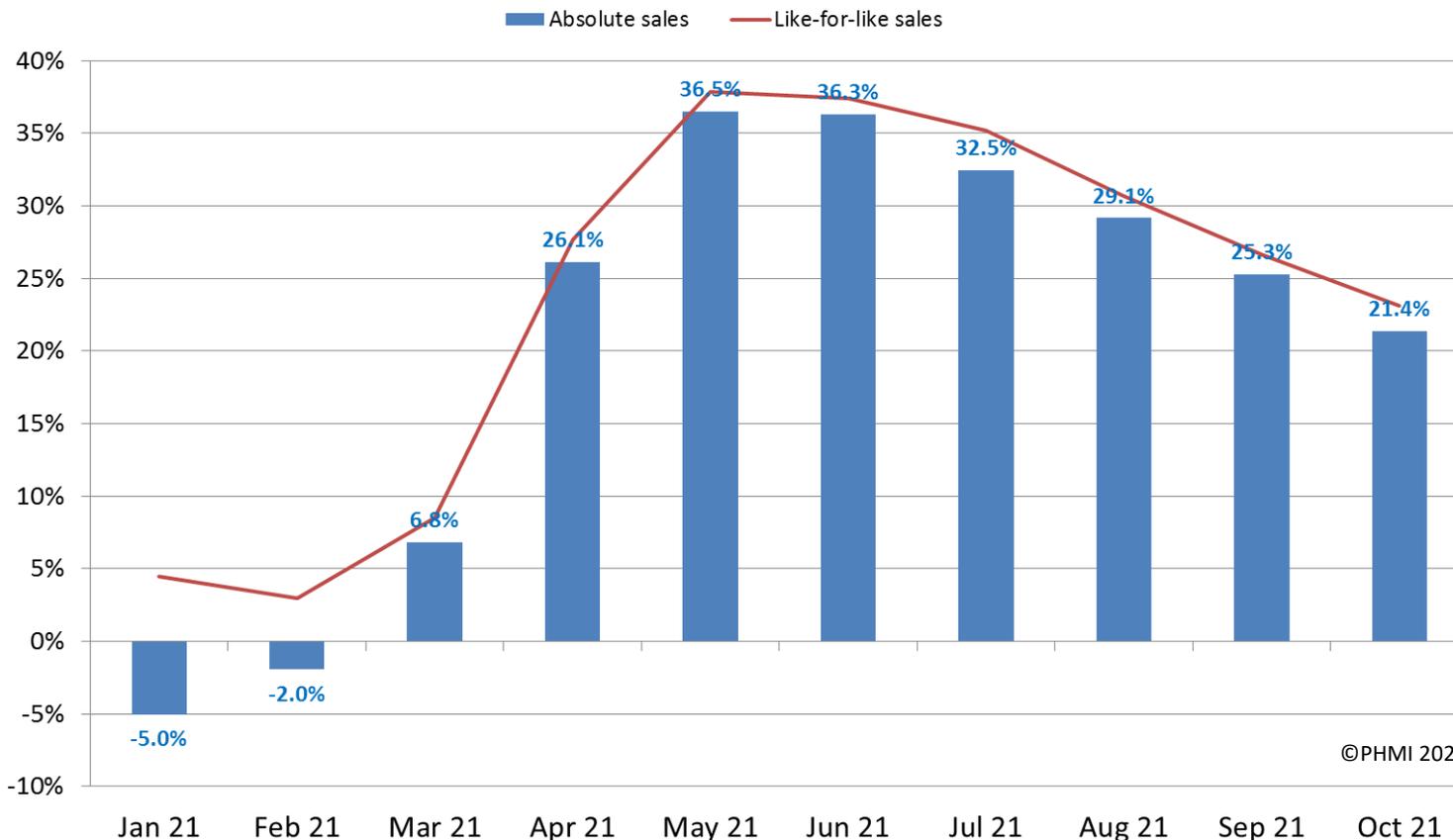
Last 10 months absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Plumbing & Heating
Merchant Index



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



Value figures shown for Total sales

©PHMI 2021

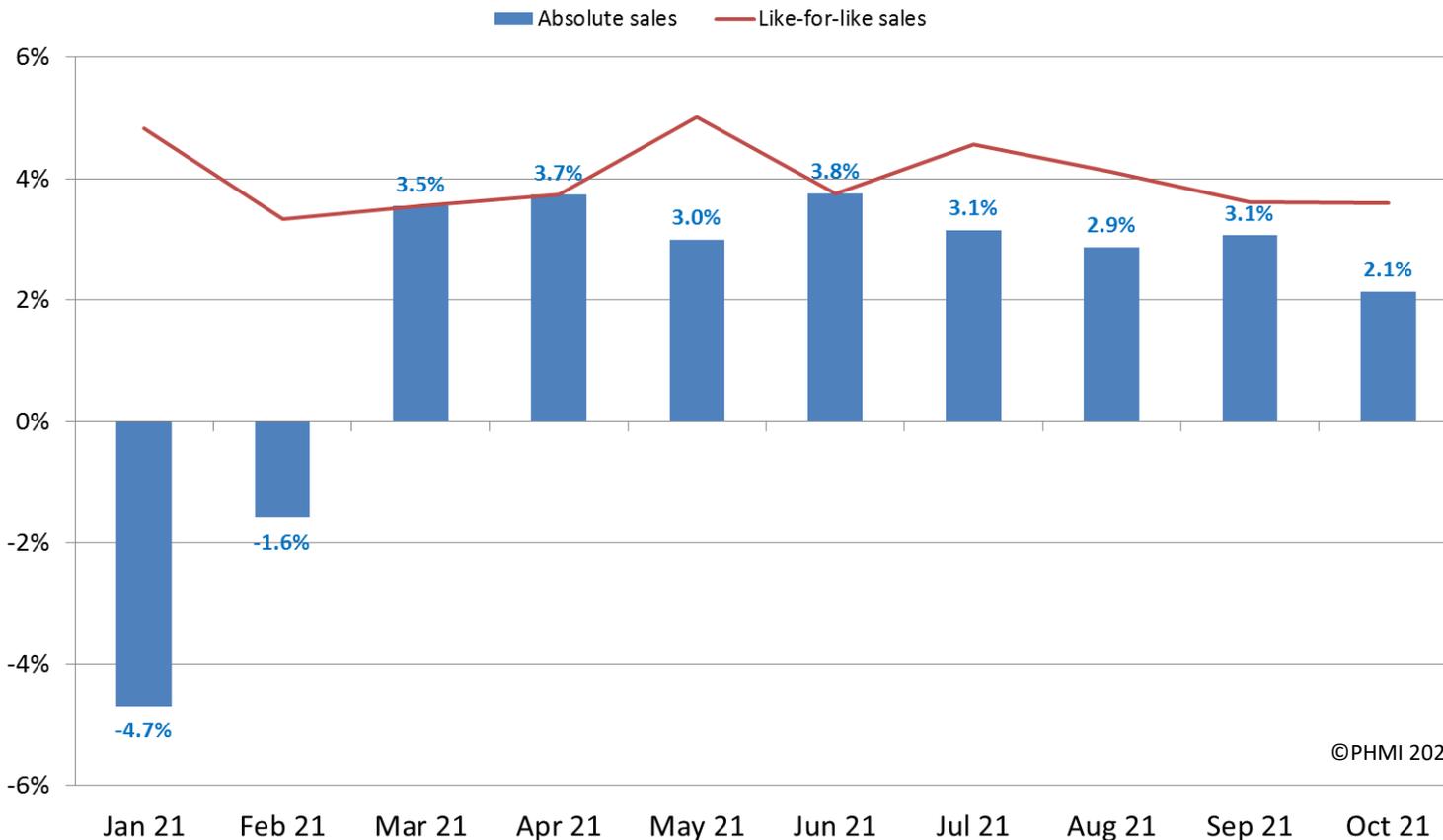
Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Oct 2021

Year To Date: 2021 v 2019

Last 10 months absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

Cumulative year to date: 2-year comparison



Value figures shown for Total sales

©PHMI 2021

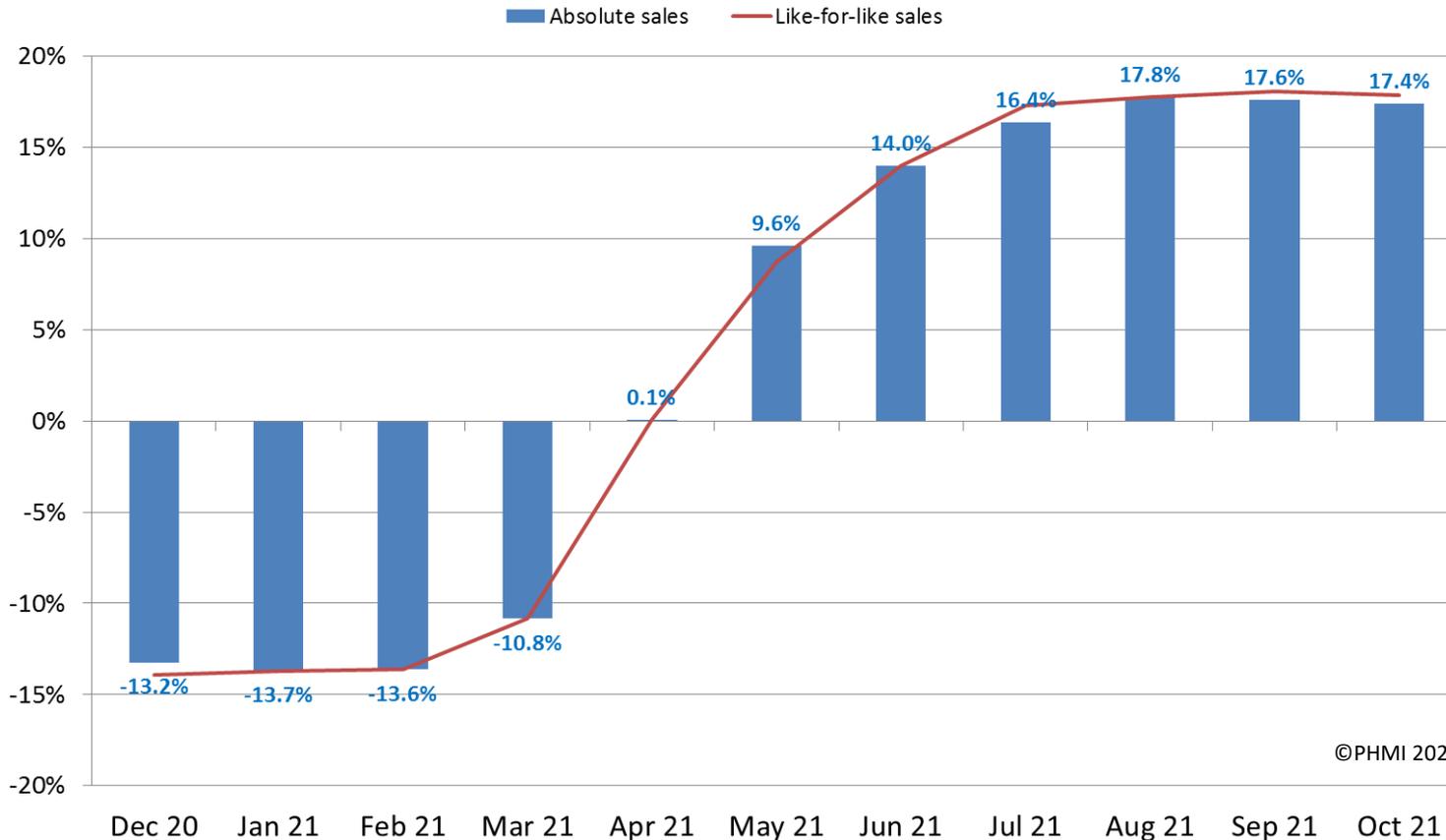
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Oct 2021

Last 12 months: Year on year

Absolute sales index and like-for-like sales index*

(Like-for-like sales take trading day differences into account)

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 Oct 2021

PHMI Trading Days



Monthly
Index: 20.8

2020											
Jan	Feb	Mar*	Apr*	May*	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	20	19	22	21	21	22	21		

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	

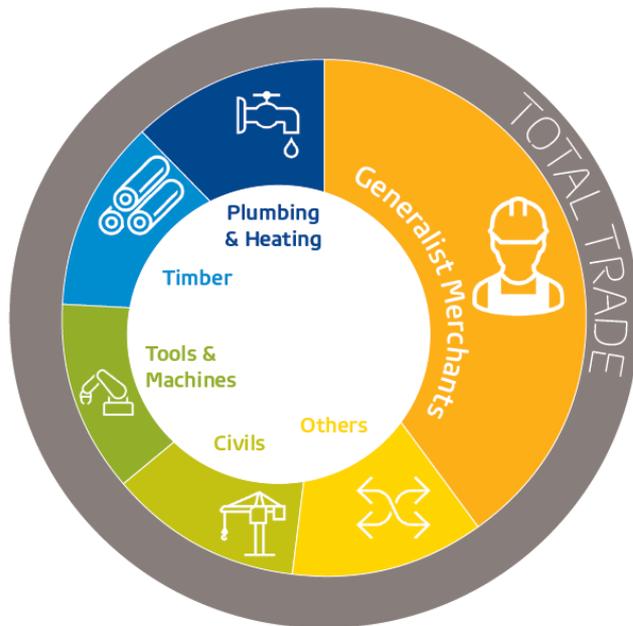
Full Year

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.

GfK Source: GfK's
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Data, Jan 2019 to Oct 2021

Plumbing & Heating channel definition and merchants



Plumbing Specialists

Plumbing & Hardware Specialists are small outlets handling nails, hardware products, pipes, ironware, paint, faucets, sanitary products, bathroom accessories, ceramic tiles and heating equipment such as boilers, radiators & heating controls.

Their main turnover is generated with product groups such as installation, paint & plumbing/hardware product groups (e.g. nails, saws, scissors, keys).

Plumbing Merchants

Large outlets handling nails, hardware products, pipes, ironware, paint, faucets, sanitary products, bathroom accessories & kitchen, bathroom furniture, bath tubs and heating equipment such as boilers, radiators & heating controls. Compared with Plumbing Specialists they are bigger & generate a higher turnover.

Their main turnover is generated with bath/kitchen faucets, sanitary & complementary products, bathroom accessories, tiles and bath tubs and bathroom furniture.

Turnover is generated with professional end users (B2B) as well as private end users (B2C).

Merchant partners include:



Plumbing Trade Supplies



Contacting PHMI

PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts and speaking for their markets and building their brands should contact Toby Aiken or Ralph Sutcliffe:



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More data available

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