

“building **excellence**  
in materials supply”

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

# Builders Merchant Building Index



## Monthly report for November 2021

(Published 20 January 2022)

# Building the Industry & Building Brands from Knowledge



# Contents - 1

Click links below to visit pages

The 'Contents' link in the footer brings you back to this page.

Click links to visit pages:	Page
<a href="#">Introduction</a>	<a href="#">5</a>
<a href="#">Trading day differences explained</a>	<a href="#">6</a>
<a href="#">Overview</a>	<a href="#">7-8</a>
<a href="#">BMBI Expert Panel</a>	<a href="#">9-10</a>
<b>Monthly data:</b>	
<a href="#">Monthly BMBI indices, by category</a>	<a href="#">11</a>
<a href="#">Monthly index chart, absolute and like-for-like sales index chart</a>	<a href="#">12</a>
<a href="#">November index chart, by category</a>	<a href="#">13</a>
<a href="#">Monthly year-on-year chart, absolute and like-for-like sales</a>	<a href="#">14</a>
<a href="#">November year-on-year sales index chart, by category</a>	<a href="#">15</a>
<a href="#">November year-on-year like-for-like index chart, by category</a>	<a href="#">16</a>
<a href="#">November v November 2019 sales index chart, by category</a>	<a href="#">17</a>
<a href="#">November v November 2019 like-for-like sales index chart, by category</a>	<a href="#">18</a>
<a href="#">November v October sales index chart, by category</a>	<a href="#">19</a>
<a href="#">November v October like-for-like sales index chart, by category</a>	<a href="#">20</a>
<b>Quarterly data:</b>	
<a href="#">Quarterly BMBI indices, by category</a>	<a href="#">21</a>
<a href="#">Quarterly index chart, absolute and like-for-like sales index chart</a>	<a href="#">22</a>
<a href="#">Quarter 3 index chart, by category</a>	<a href="#">23</a>
<a href="#">Quarterly indices, by category</a>	<a href="#">24-26</a>
<a href="#">Quarter 3 year-on-year, absolute and like-for-like sales index chart</a>	<a href="#">27</a>

Click links to visit pages:	Page
<a href="#">Quarter 3 year-on-year sales index chart, by category</a>	<a href="#">28</a>
<a href="#">Quarter 3 year-on-year like-for-like sales index chart, by category</a>	<a href="#">29</a>
<a href="#">Quarter 3 v Quarter 3 2019 sales index chart, by category</a>	<a href="#">30</a>
<a href="#">Quarter 3 v Quarter 3 2019 like-for-like sales index chart, by category</a>	<a href="#">31</a>
<a href="#">Quarter 3 v Quarter 2 sales index chart, by category</a>	<a href="#">32</a>
<a href="#">Quarter 3 v Quarter 2 like-for-like sales index chart, by category</a>	<a href="#">33</a>
<b>Other periods:</b>	
<a href="#">Last 3 months year-on-year sales index chart, by category</a>	<a href="#">34</a>
<a href="#">Last 3 months v 2019 sales index chart, by category</a>	<a href="#">35</a>
<a href="#">Last 3 months v previous 3 months sales index chart, by category</a>	<a href="#">36</a>
<a href="#">Last 3 months v previous 3 months like-for-like sales index chart, by category</a>	<a href="#">37</a>
<a href="#">Year to date year-on-year sales index chart</a>	<a href="#">38</a>
<a href="#">Year to date year-on-year like-for-like sales index chart</a>	<a href="#">39</a>
<a href="#">Year to date v 2019 sales index chart</a>	<a href="#">40</a>
<a href="#">Year to date v 2019 like-for-like sales index chart</a>	<a href="#">41</a>
<a href="#">Last 12 months sales index chart, by category</a>	<a href="#">42</a>
<a href="#">Last 12 months year-on-year sales index chart, by month</a>	<a href="#">43</a>

Continued over the page...

# Contents - 2

Continued: click links below to visit pages

Click links to visit pages:	Page
<b>Monthly Category Charts:</b>	
<a href="#">Timber &amp; Joinery Products</a>	44
<a href="#">Heavy Building Materials</a>	44
<a href="#">Decorating</a>	45
<a href="#">Tools</a>	45
<a href="#">Workwear &amp; Safetywear</a>	46
<a href="#">Ironmongery</a>	46
<a href="#">Landscaping</a>	47
<a href="#">Plumbing Heating &amp; Electrical</a>	47
<a href="#">Renewables &amp; Water Saving</a>	48
<a href="#">Kitchens &amp; Bathrooms</a>	48
<a href="#">Miscellaneous</a>	49
<a href="#">Services</a>	49
<a href="#">Trading days</a>	50
<a href="#">Methodology</a>	51 – 53
<b>Plumbing &amp; Heating Merchant Index:</b>	
<a href="#">Plumbing &amp; Heating Merchant Index</a>	54
<a href="#">Introduction</a>	55
<a href="#">Overview</a>	56

Click links to visit pages:	Page
<a href="#">Month and 3-month index table</a>	57
<a href="#">Monthly index</a>	58
<a href="#">Month, year-on-year</a>	59
<a href="#">Month v 2019</a>	60
<a href="#">Month on month</a>	61
<a href="#">Rolling 3 months, year-on-year</a>	62
<a href="#">Rolling 3 months v previous 3 months</a>	63
<a href="#">Quarterly index</a>	64
<a href="#">Quarter, year-on-year</a>	65
<a href="#">Quarter on quarter</a>	66
<a href="#">Year to date, year-on-year</a>	67
<a href="#">Year to date v 2019</a>	68
<a href="#">Last 12 months, year-on-year</a>	69
<a href="#">Trading days</a>	70
<a href="#">Plumbing &amp; Heating channel definition and merchants</a>	71
<a href="#">PHMI Contacts</a>	72
<a href="#">BMF (Builders Merchant Federation) Forecast Report</a>	73 – 74
<a href="#">BMBI Contacts</a>	75

# Introduction



This Builders Merchant Building Index (BMBI) report contains data from GfK's ground-breaking Builders Merchants Panel, which analyses data from over 80% of generalist builders' merchants' sales throughout Great Britain. GfK's Builders Merchant Point of Sale Tracking Data sets a gold standard in reliable market trends. Unlike data from sources based on relatively small samples or estimates, or sales from suppliers to the supply chain, this up-to-date data is based on actual sales from merchants to builders and other trades. It's therefore a very good proxy for housing RMI.

BMBI trend data is indexed on the 12 month period July 2014 to June 2015. The monthly series tracks what is happening in the market month by month and includes an in-depth review every quarter. This trend series gives the industry access to far more accurate and comprehensive insights than that available to other construction sectors.

MRA Research produces the Builders Merchant Building Index, a brand of the BMF (Builders Merchant Federation), to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: West Fraser (formerly known as Norbord), Pavestone UK Ltd, eCommonSense, British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Hanson Cement, Keystone Lintels, Knauf Insulation, Dulux Trade, Lakes and Bostik UK. Meet the Experts [here](#) and on pages 9 and 10 of this report.

## Recognition for BMBI

One of the aims of BMBI is to reach across and beyond construction. It's now syndicated to a growing number of trade magazines in different sectors on a regular basis. Outside the industry, economists, banks, consultancies, investment bodies and the big accountants regularly refer to it and BMBI is referenced alongside the Office for National Statistics (ONS) data in the Government Department for Business, Energy and Industrial Strategy (BEIS) monthly construction update. From time to time, news outlets, including the BBC contact BMBI Experts and MRA for commentary on the industry.

## More data available

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

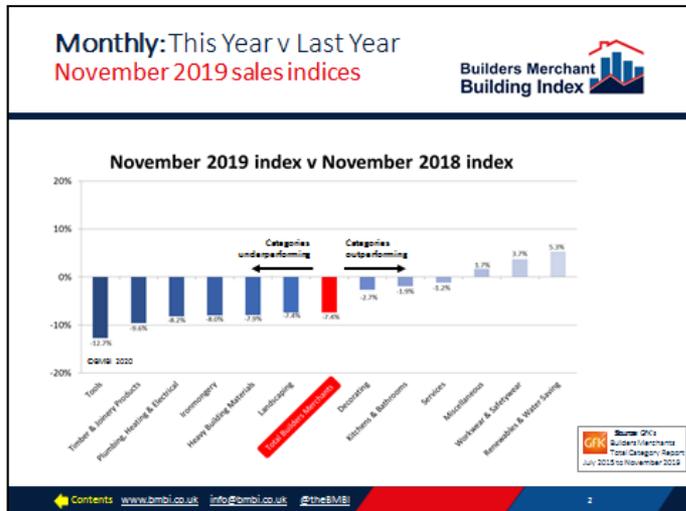
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

## Strong November sales. Record month for Kitchens & Bathrooms and Services.

Total Builders Merchants November 2021 value sales were up 17.4% compared with the same month last year, with one more trading day this year. All categories sold more. Two categories had their best-ever month and a further two had their highest 2021 monthly turnover. Timber & Joinery Products (+30.2%) did best in November, with its 15<sup>th</sup> consecutive month of year-on-year growth. Next-strongest were Renewables & Water Saving (+18.0%) and Landscaping (+17.1%). Services was also up 17.1% and recorded its best-ever sales since BMBI started in July 2014. Other categories growing strongly included Kitchens & Bathrooms (+14.5%), which also had its highest-ever monthly BMBI turnover, Plumbing Heating & Electrical (+13.8%) which had its best month of 2021 and Heavy Building Materials (+13.5%). Workwear & Safetywear (+3.3%) had the lowest growth but still recorded its highest monthly sales of the year. Overall like-for-like sales were 12.1% higher than in November 2020.

### November 2021 v November 2019

Total sales in November 2021 were 28.0% higher than the same month two years ago, with one more trading day this year. Eleven of the twelve categories sold more. Landscaping (+51.4%) and Timber & Joinery Products (+51.3%) were especially strong, continuing the trend seen across most of 2021. Heavy Building Materials (+23.4%), Kitchens & Bathrooms (+12.1%), Ironmongery (+10.6%) and Tools (+8.8%) were among eight categories growing more slowly. Only Workwear & Safetywear (-2.9%) sold less compared with November 2019. Overall like-for-like sales were 22.2% higher than November 2019.

### Month-on-Month

Total Merchant sales were 3.2% higher in November than in October, helped by one more trading day in November. Eleven of the twelve categories sold more. Renewables & Water Saving (+15.9%) did best, followed by Workwear & Safetywear (+13.4%) and Kitchens & Bathrooms (+12.5%). Plumbing Heating & Electrical (+9.4%), Decorating (+4.4%) and Heavy Building Materials (+3.7%) also out-performed merchants overall. Only Landscaping (-3.2%) sold less. Total like-for-like sales were down 1.4%.

### Last 3 months, year on year

Total sales in September to November were up 14.5% on the same period last year. Eleven of the twelve categories sold more. Timber & Joinery Products (+32.4%) continued to strongly out-perform the total market. Growth in other categories varied, from Landscaping (+10.7%), Kitchens & Bathrooms (+10.4%) and Heavy Building Materials (+9.5%), to Ironmongery (+2.4%). Workwear & Safetywear (-2.8%) was the only category that sold less.

### Last 3 months v 2019

Compared with two years ago, overall sales in the latest three months were 20.9% higher than in September-November 2019. Ten of the twelve categories sold more. Timber & Joinery Products (+46.4%) and Landscaping (+39.0%) were outstanding in comparison with 2019, as has been the case throughout 2021.

'Last 3 months v 2019' continues on the next page...

Total Builders Merchants November 2021 value sales were up 17.4% compared with the same month last year and 28.0% higher than the same month two years ago. Kitchens & Bathrooms (+14.5%), had its highest-ever monthly BMBI turnover.

# Overview - 2

...Overview continued from the previous page:

Heavy Building Materials (+14.9%) also did well, with Kitchens & Bathrooms (+7.2%) Ironmongery (+3.0%) and Decorating (+0.4%) growing more slowly. Workwear & Safetywear (-7.3%) sold less.

### **Last 3 months v previous 3 months**

Total sales in the latest three months were 3.2% lower than in the previous three months, with one more trading day in the most recent period. Eight categories sold more, led by Workwear & Safetywear (+17.4%) and Plumbing Heating & Electrical (+15.5%), with Tools and Kitchens & Bathrooms both 7.4% higher. Ironmongery (+0.0%) was flat. The remaining three categories sold less, with seasonal category Landscaping (-24.6%) weakest. Overall like-for-like sales were 4.6% lower than in June to September.

### **Year to date, year on year**

Total Merchants sales in January to November 2021 were up 31.5% compared with Covid-affected January to November 2020. All categories sold more. There were two less trading days this year. Timber & Joinery Products (+54.1%) was the top-performer by some margin, followed by Landscaping (+32.0%). Most other categories also had double-digit growth, including Tools (+28.5%), Kitchens & Bathrooms (+25.1%), Heavy Building Materials (+24.7%) and Plumbing Heating & Electrical (+24.6%). Only Workwear & Safetywear (+1.9%) failed to achieve double-digit growth. Total like-for-like sales were 32.6% higher.

### **Year to date v 2019**

Total sales in the eleven months to November 2021 were up 15.9% on January to November 2019, with two less trading days this year. Nine of the twelve categories sold more. Landscaping (+37.9%) did best, closely followed by Timber & Joinery Products (+36.9%). Categories growing more slowly included Heavy Building Materials (+9.0%) and Kitchens & Bathrooms (+0.8%). Of three categories selling less, Decorating (-1.8%) was weakest. Total like-for-like sales were 16.9% higher this year.

### **MAT**

Total Merchants sales in the 12 months December 2020 to November 2021 were 30.1% higher than in the same 12 months a year earlier. All categories sold more. Standout category Timber & Joinery Products (+52.1%) continued to perform strongly. Landscaping (+31.7%), Tools (+26.9%), Heavy Building Materials (+23.5%) and Kitchens & Bathrooms (+23.4%) were next-strongest. Workwear & Safetywear (+2.2%) had the lowest growth.

### **Index**

November's overall BMBI index was 145.0, particularly helped by Timber & Joinery Products (182.1). Almost all categories recorded indices over a 100, including Landscaping (143.7), Plumbing Heating & Electrical (143.3) and Kitchens & Bathrooms (140.6). Only Renewables (82.9) was below 100.

Total Merchants sales January to November 2021 were up 31.5% compared with Covid-affected January to November 2020. And up 15.9% on January to November 2019.

Timber & Joinery Products and Landscaping were the star categories.

# The Expert Panel

## Speaking for their markets - 1

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

The Q3 2021 report, which includes commentary from our experts is available [here](#)

**Meet the Builders Merchant Building Index Experts here and on the next page:**

### Expert for Drylining Systems:



**Stacey Temprell,**  
Marketing Director  
British Gypsum

[Read latest comment: Q3 2021 Report](#)

### Expert for Bricks & Roof Tiles:



**Kevin Tolson,**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q3 2021 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q3 2021 Report](#)

### Expert for Civils & Green Infrastructure:



**Steve Durdant-Hollamby,**  
Managing Director  
Polypipe Civils

[Read latest Comment: Q3 2021 Report](#)

### Expert for Lead:



**Lynn Street**  
Sales & Marketing Manager  
Midland Lead

[Read latest Comment: Q3 2021 Report](#)

### Expert for Wood-Based Panels:



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

[Read latest Comment: Q3 2021 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q3 2021 Report](#)

### Expert for PVC-U Windows & Doors:



**Kevin Morgan**  
Group Commercial Director  
The Crystal Group

[Read latest Comment: Q3 2021 Report](#)

### Expert for Shower Enclosures and Showering:



**Mick Evans**  
Operations Director  
Lakes

[Read latest Comment: Q3 2021 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q3 2021 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q3 2021 Report](#)

### Expert for Paint:



**Paul Roughan**  
Trade Merchants Sales Director  
Dulux Trade

[Read latest Comment: Q3 2021 Report](#)

### Expert for Website & Product Data Management Solutions:



**Andy Scothern**  
Managing Director  
eCommonSense

[Read latest Comment: Q3 2021 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q3 2021 Report](#)

### Expert for Adhesives & Sealants:



**Mathew Whitehouse**  
Marketing Director  
Bostik UK

[Read latest Comment: Q3 2021 Report](#)

# Monthly: Index and Categories

November 2020\* – November 2021

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



		2020		2021								©BMBI 2022		
MONTHLY SALES VALUE INDEX	Index	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
<b>Total Builders Merchants</b>	<b>100</b>	<b>123.5</b>	<b>83.5</b>	<b>100.7</b>	<b>109.4</b>	<b>151.9</b>	<b>150.6</b>	<b>141.4</b>	<b>157.1</b>	<b>151.1</b>	<b>139.3</b>	<b>147.9</b>	<b>140.4</b>	<b>145.0</b>
Timber & Joinery Products	100	139.9	95.2	120.0	128.8	175.7	176.3	173.2	199.6	199.8	182.6	193.3	181.0	182.1
Heavy Building Materials	100	119.4	78.1	95.9	102.0	141.3	137.4	128.6	142.8	136.8	127.0	136.2	130.8	135.6
Decorating	100	110.5	76.2	85.8	95.7	121.7	113.2	106.5	116.7	115.0	108.7	114.8	113.5	118.5
Tools	100	100.0	70.9	84.4	93.7	120.8	110.7	98.2	100.2	97.6	93.6	101.8	100.9	109.8
Workwear & Safetywear	100	126.7	87.9	122.3	111.3	118.2	104.0	95.8	111.8	92.8	95.7	106.5	115.4	130.8
Ironmongery	100	122.9	87.8	103.1	111.5	143.1	137.4	127.0	137.0	129.2	120.2	129.2	124.6	132.8
Landscaping	100	122.8	78.0	90.1	111.9	222.5	257.0	220.5	235.1	204.8	175.3	171.9	148.5	143.7
Plumbing, Heating & Electrical	100	125.9	96.1	111.3	120.3	137.1	119.2	112.9	123.7	113.7	109.7	126.7	131.0	143.3
Renewables & Water Saving	100	70.3	50.4	62.6	62.3	85.9	78.8	72.7	80.1	72.1	70.6	70.9	71.5	82.9
Kitchens & Bathrooms	100	122.7	87.4	94.4	107.4	120.7	113.5	111.5	125.1	126.5	118.3	131.2	124.9	140.6
Miscellaneous	100	118.9	86.1	109.4	107.1	131.2	126.2	111.2	120.3	121.6	116.2	128.4	120.4	130.2
Services	100	115.4	89.0	93.5	103.3	134.5	128.8	123.5	131.4	132.8	130.2	133.4	127.7	135.1

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

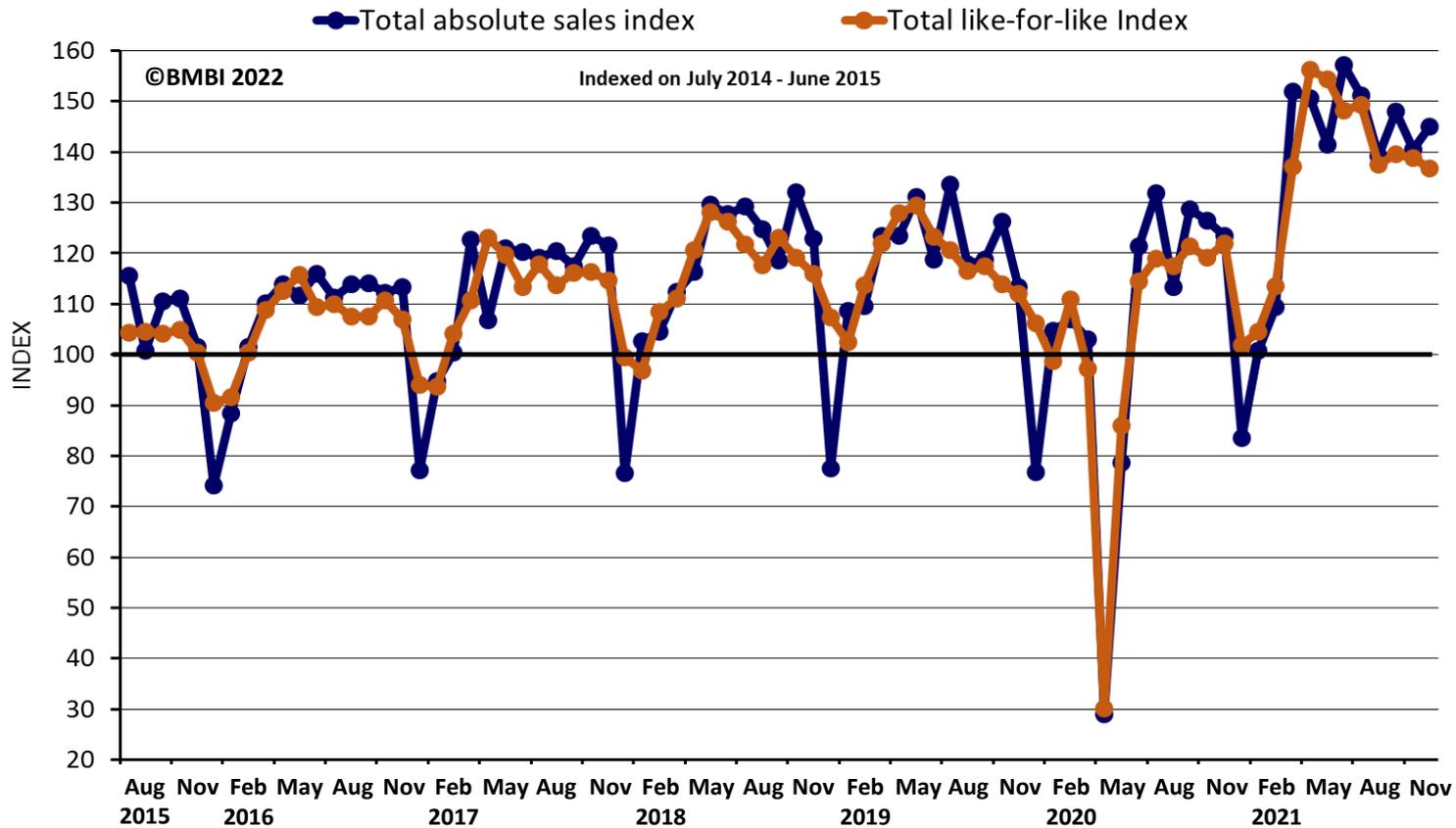
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Index

## Absolute and like-for-like sales

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

### Total Builders Merchants absolute sales v like-for-like sales index



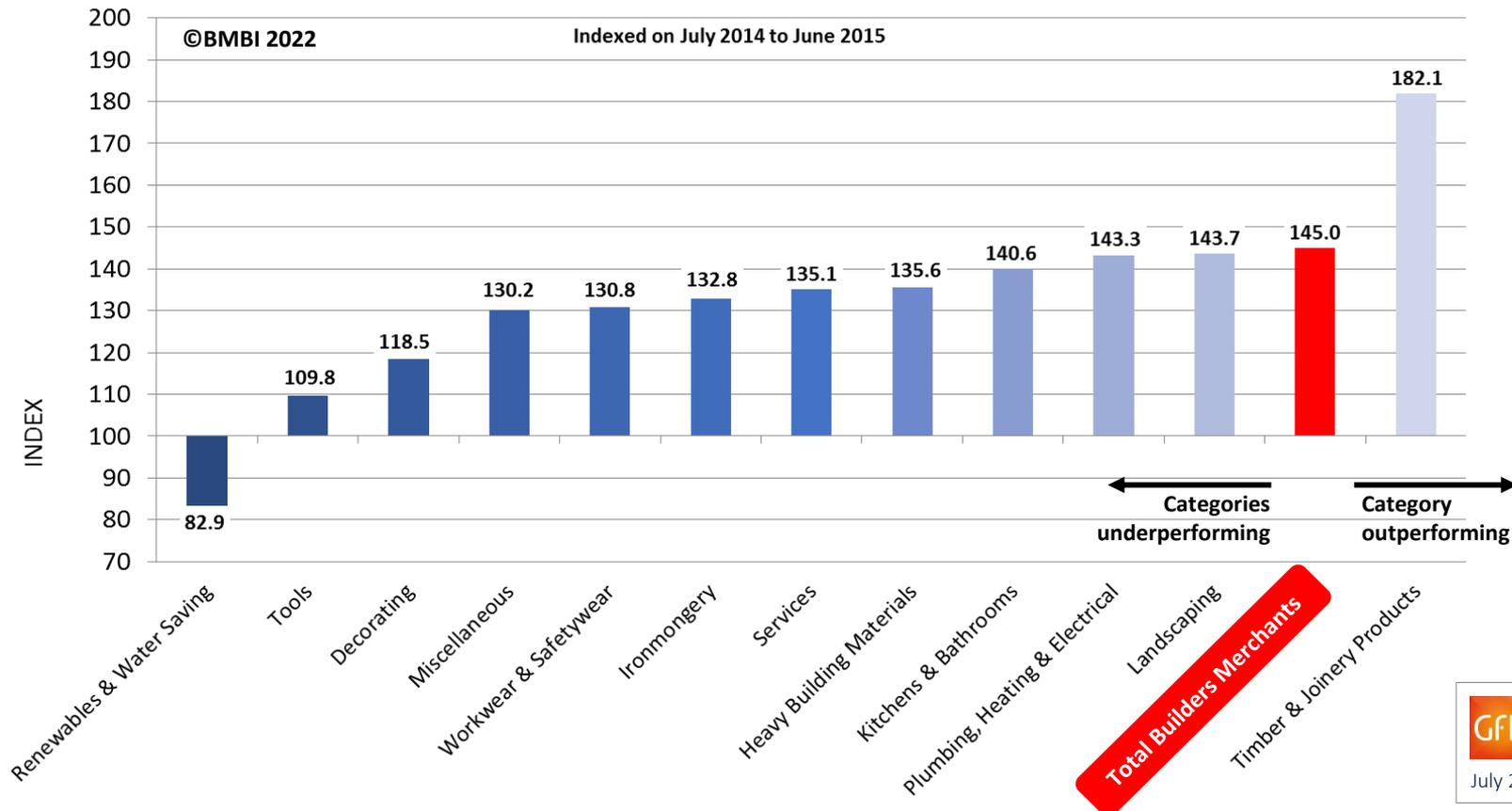
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Index and Categories

November 2021 index



## November 2021 Index



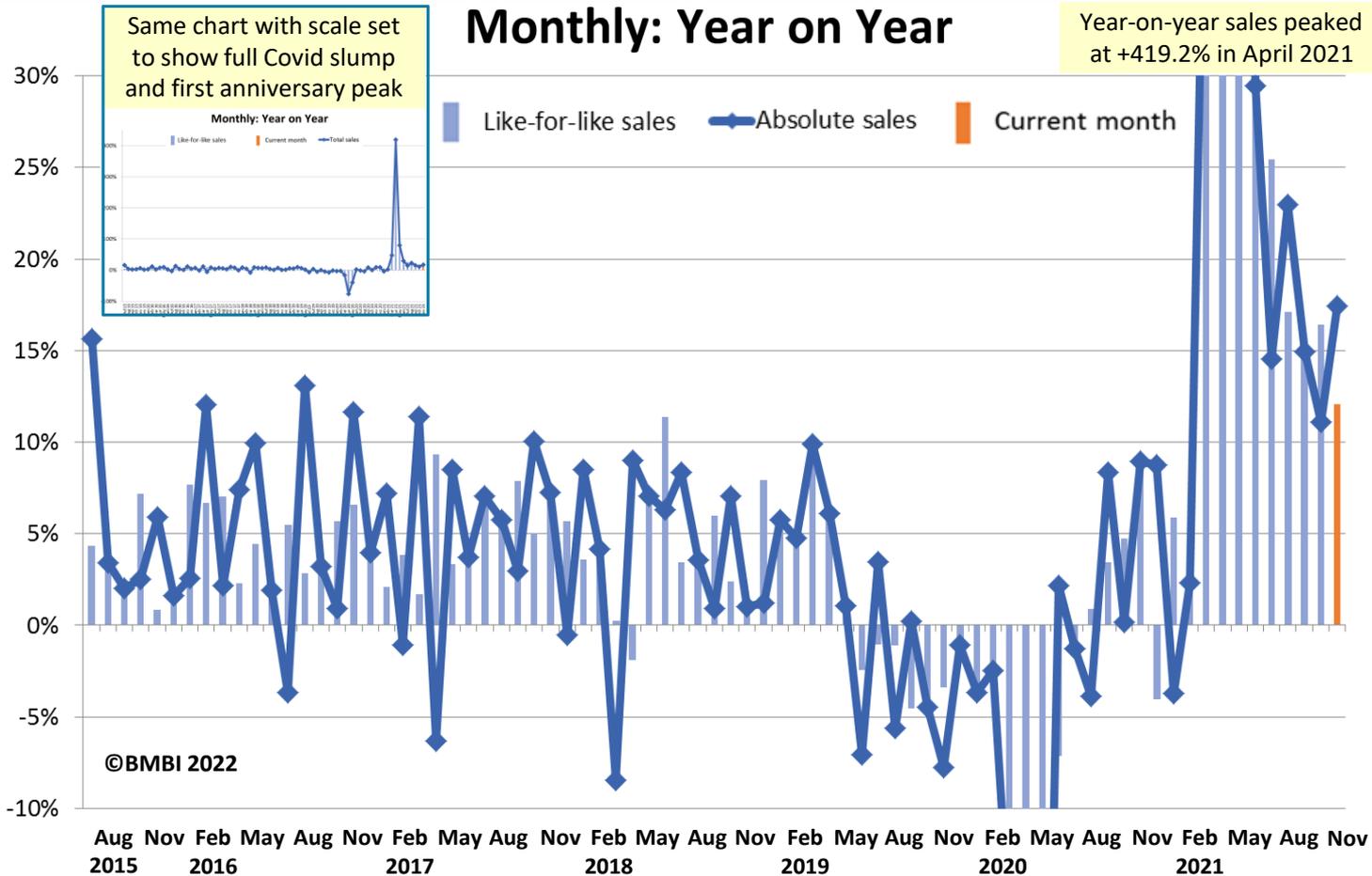
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Sales Indices Year on Year

Absolute and like-for-like sales



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

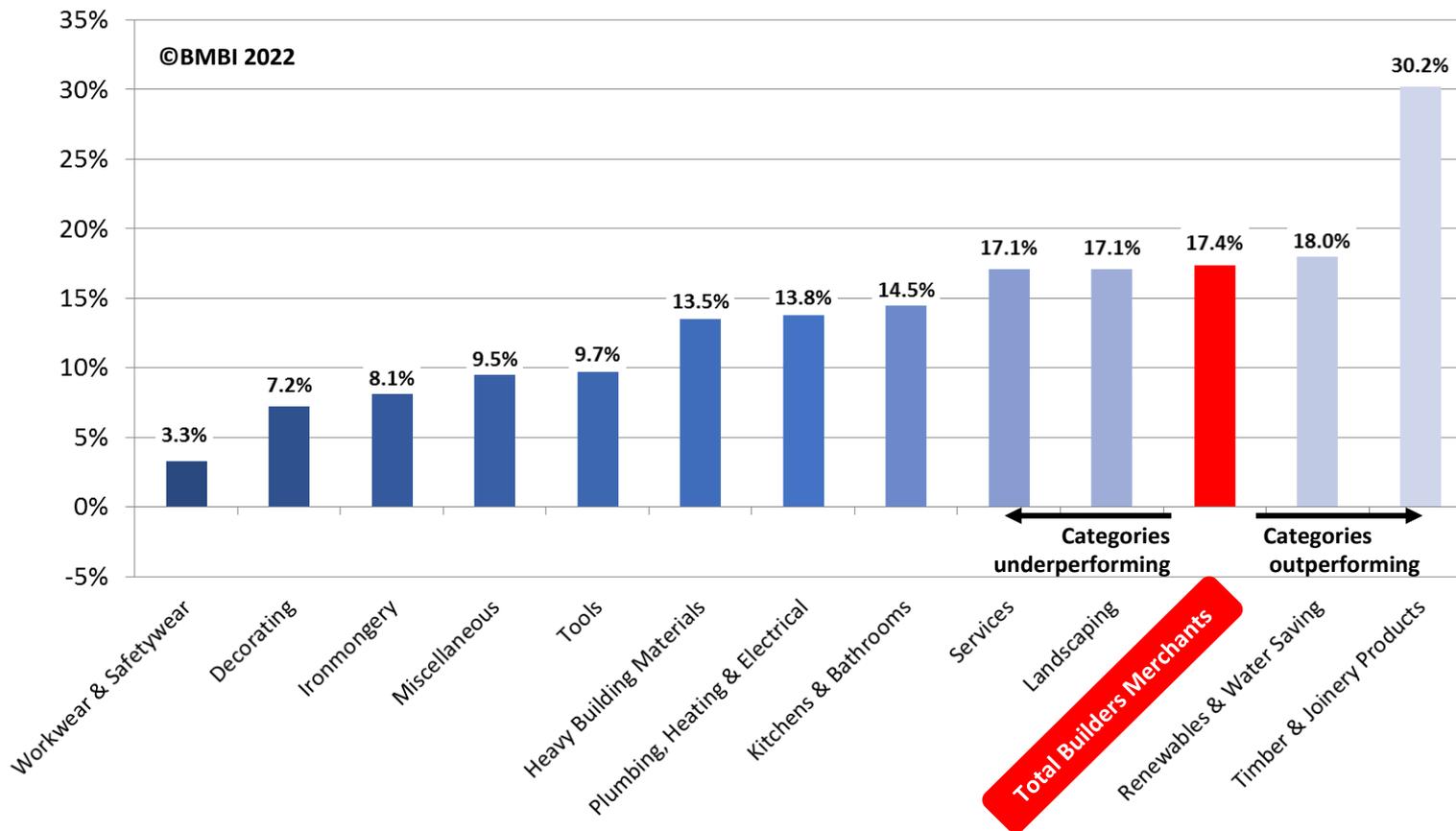


Source: GfK's Builders Merchants Total Category Report July 2015 to November 2021

# Monthly: This Year v Last Year

November 2021 sales indices

## November 2021 index v November 2020 index



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

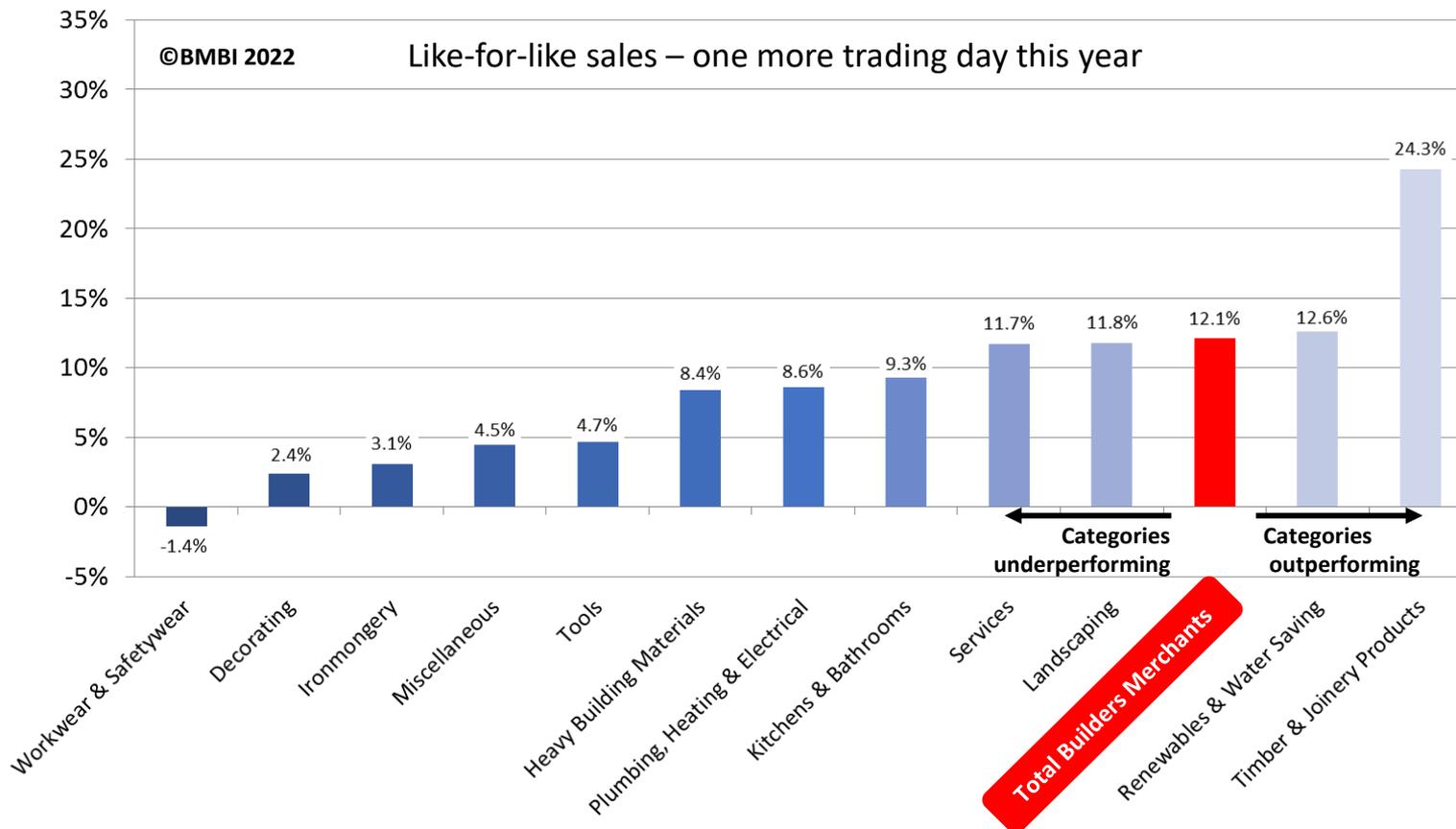
# Monthly: This Year v Last Year

## November 2021 like-for-like sales indices



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

### November 2021 index v November 2020 index

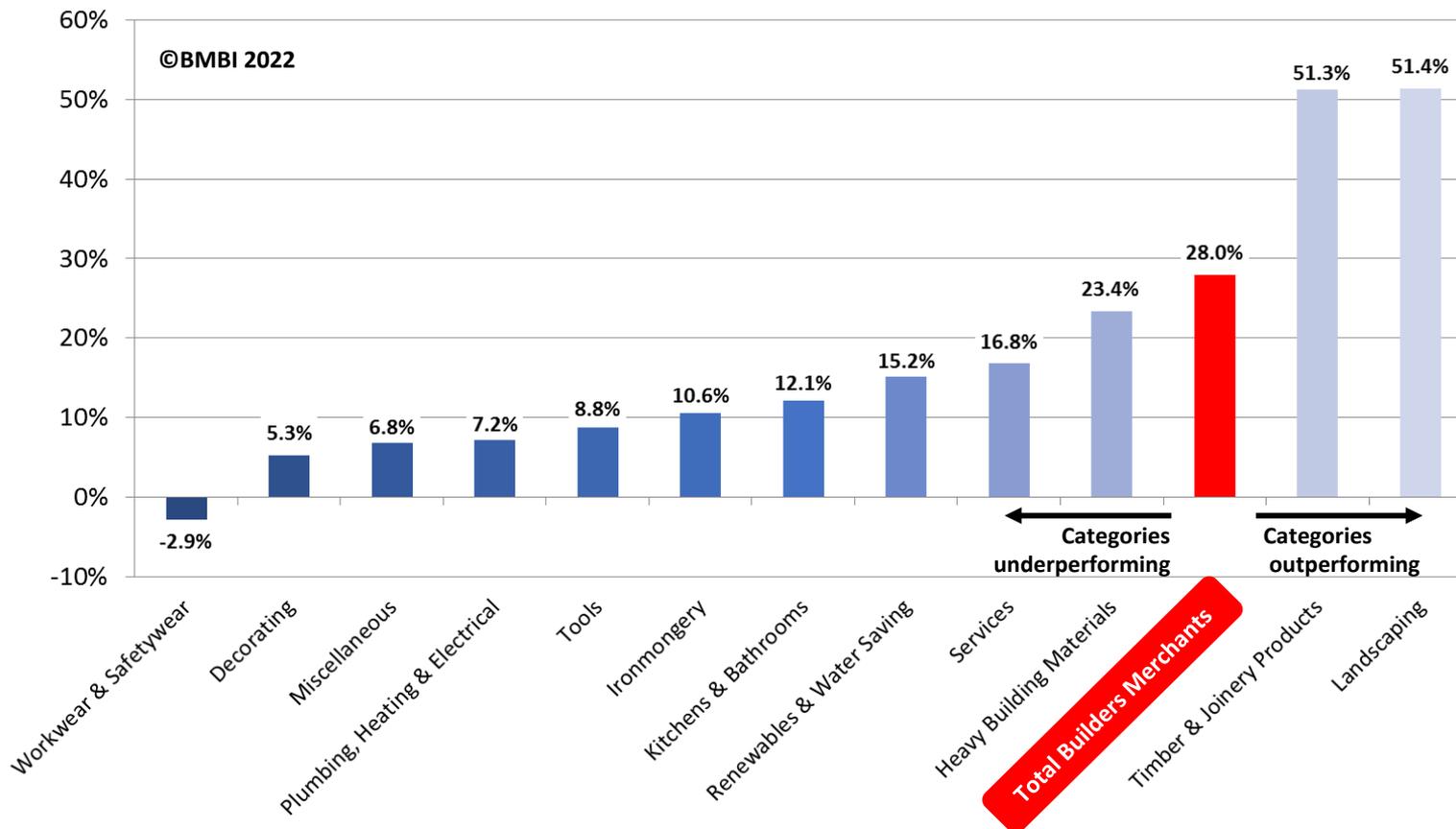


**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: This year v 2019

November 2021 2-year sales indices

## 2-year comparison: November 2021 v November 2019



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

# Monthly: This year v 2019

## November 2021 2-year like-for-like sales indices

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

### 2-year comparison: November 2021 v November 2019

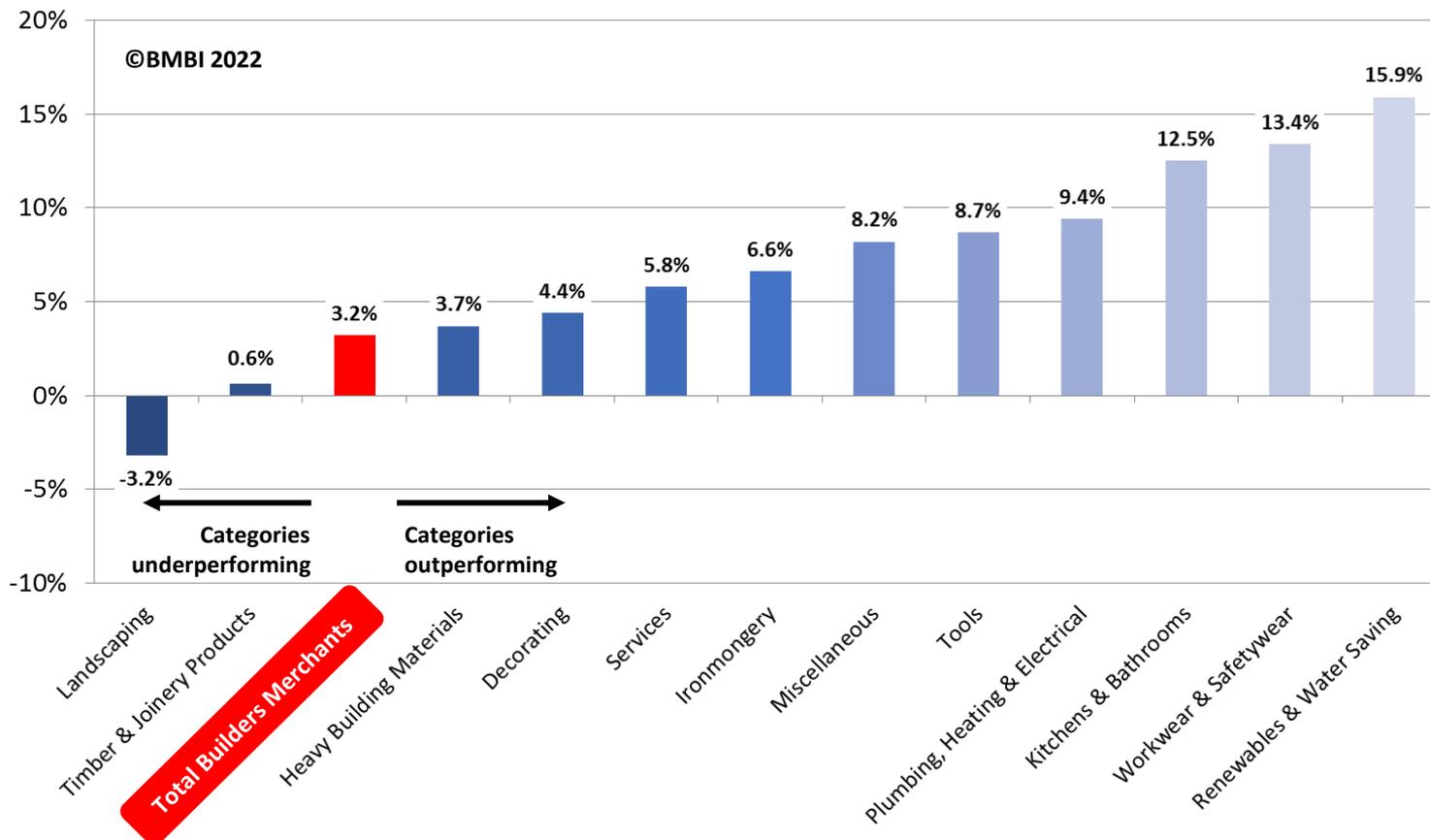


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: This Month v Last Month

November 2021 sales indices

## November 2021 Index v October 2021 Index



# Monthly: This Month v Last Month

## November 2021 like-for-like sales indices



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

### November 2021 Index v October 2021 Index



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

# 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
<b>Total Builders Merchants</b>	<b>100</b>	<b>123.4</b>	<b>105.4</b>	<b>104.9</b>	<b>76.4</b>	<b>124.6</b>	<b>111.1</b>	<b>120.7</b>	<b>149.7</b>	<b>146.1</b>
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.

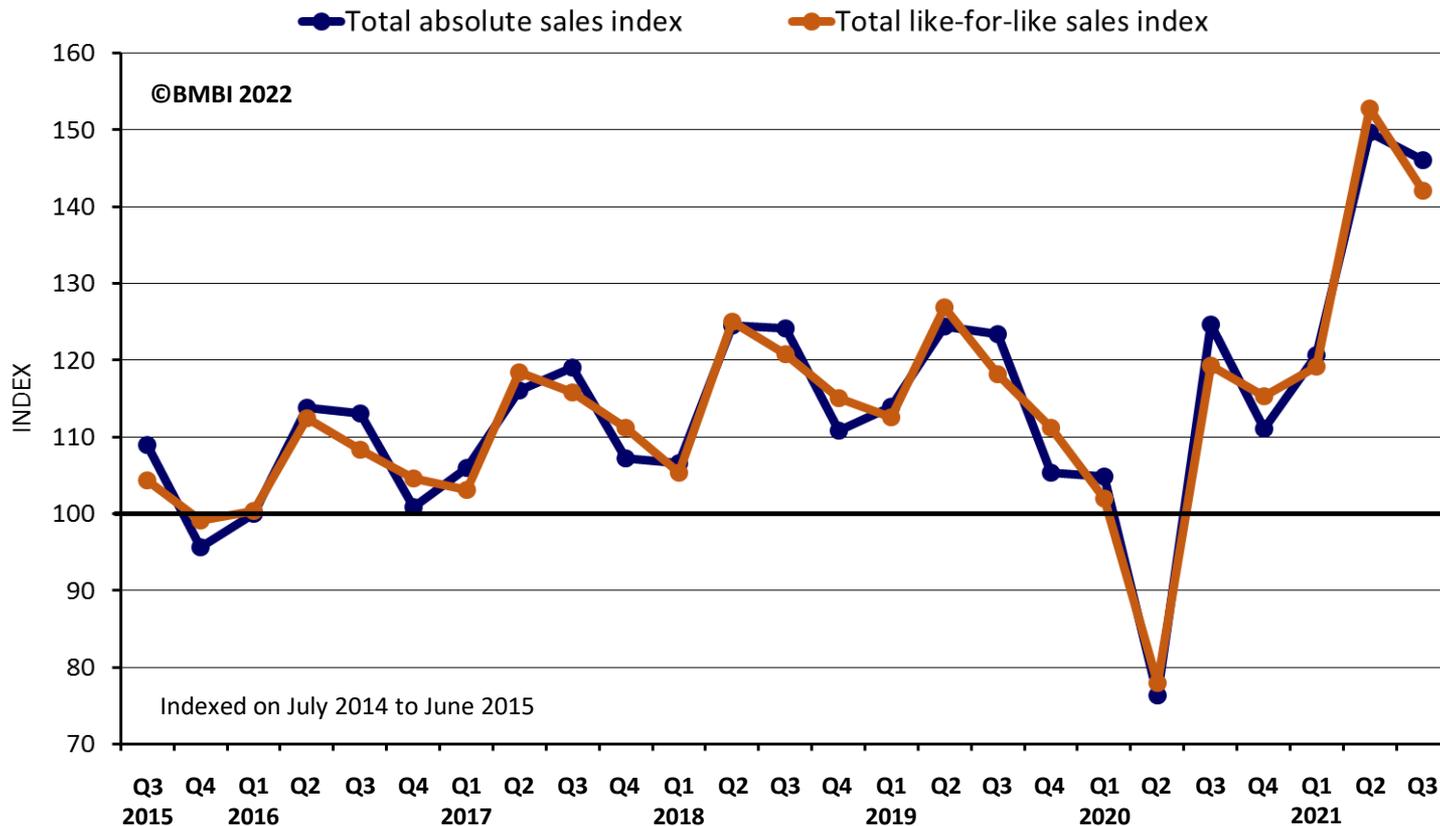
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: Index

Absolute and like-for-like sales

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

## Total Builders Merchants absolute sales index v like-for-like sales index



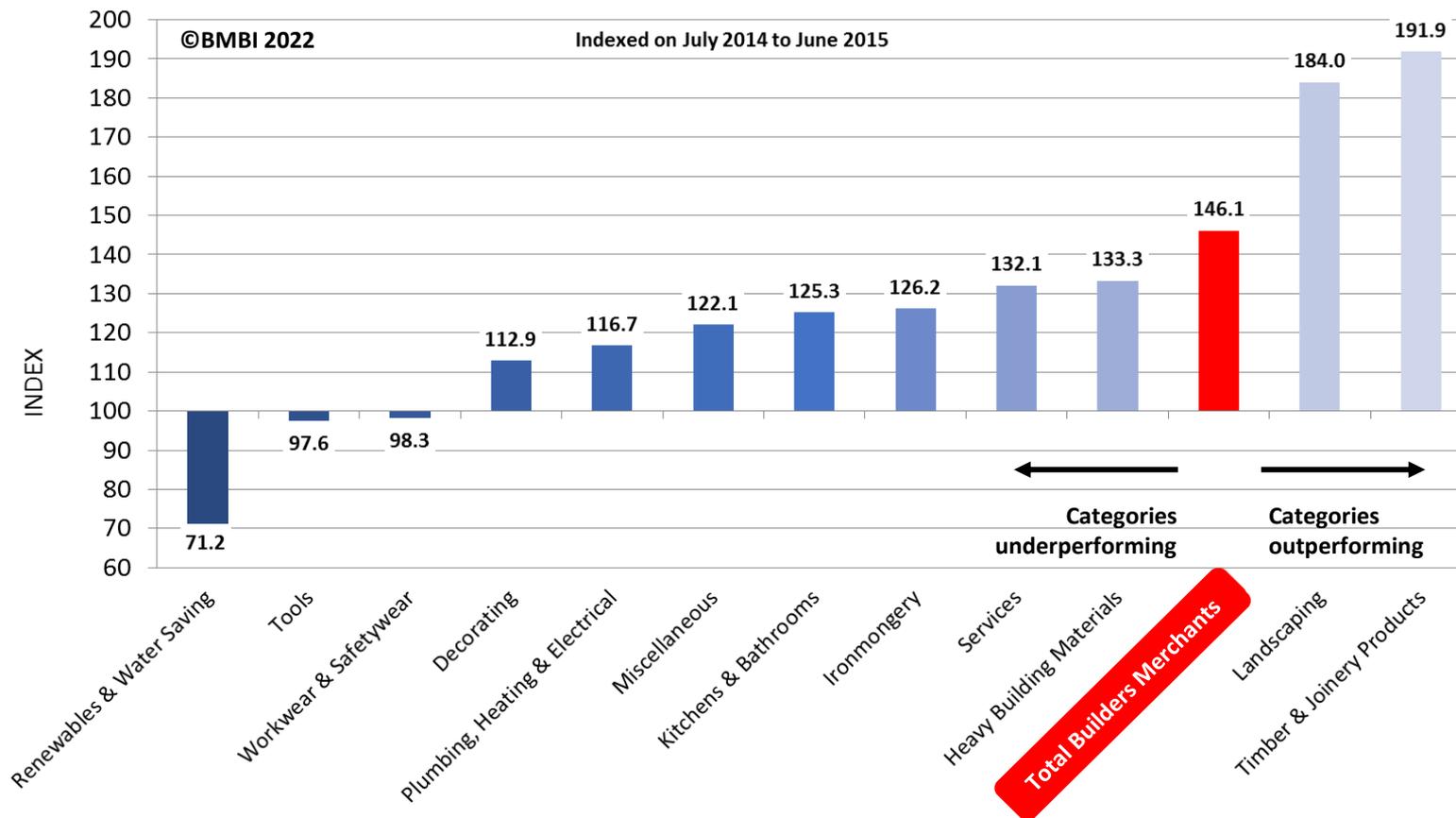
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: Index and Categories

Q3 2021 index



## Quarter 3 2021



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

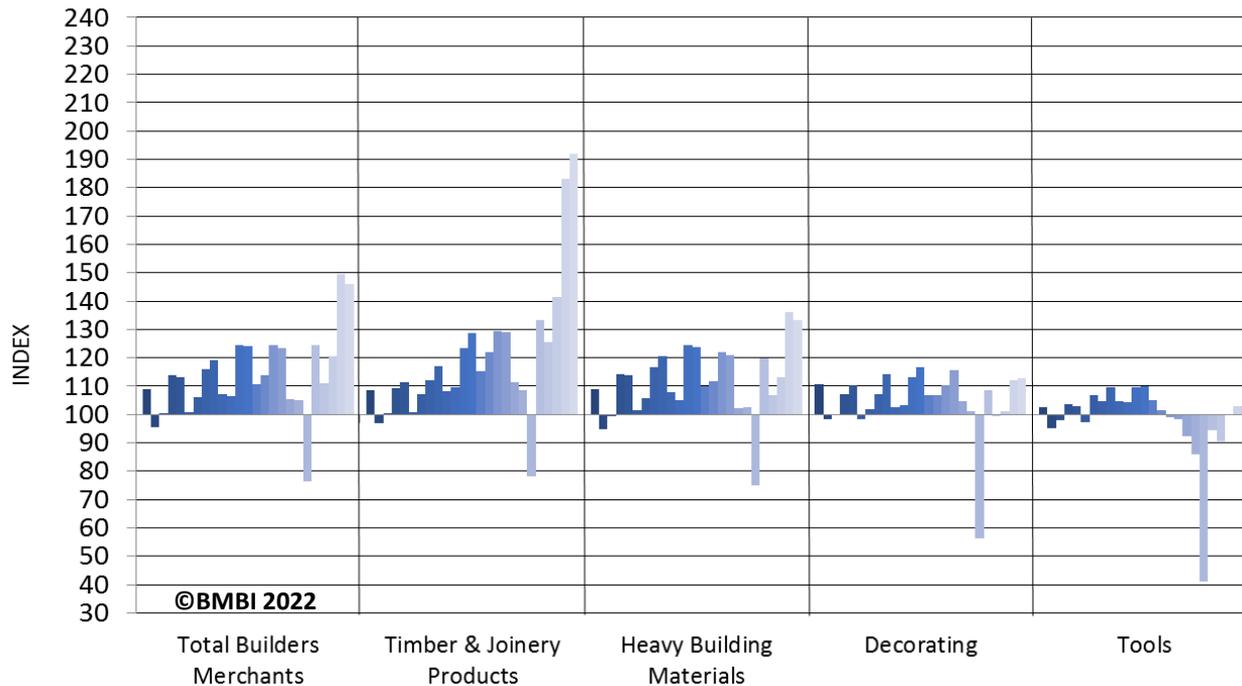
# Quarterly: Index and Categories - 1

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

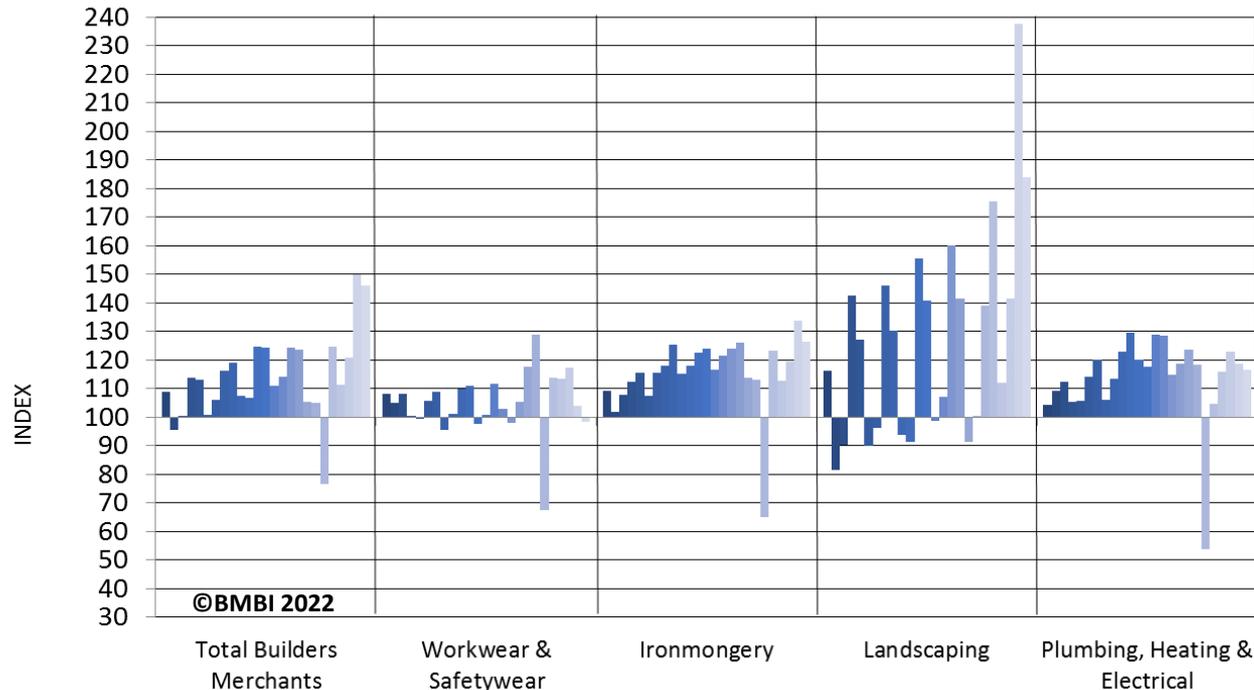
# Quarterly: Index and Categories - 2

Quarterly indices



- 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

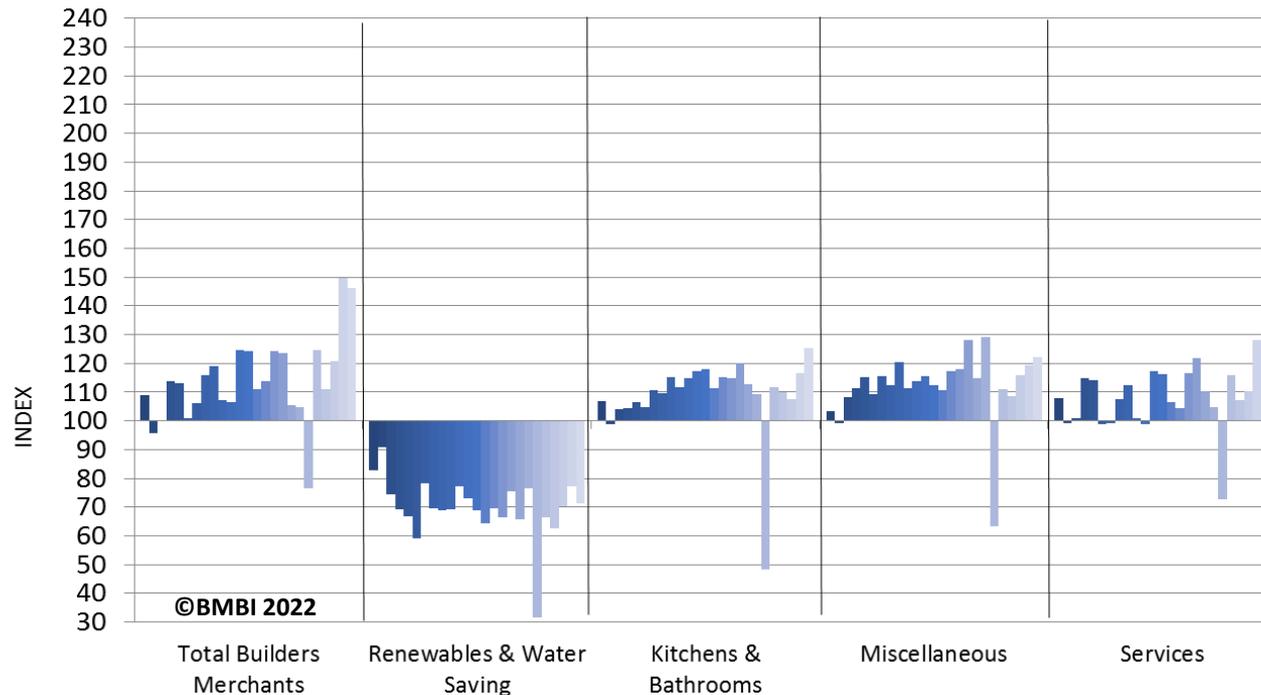
# Quarterly: Index and Categories - 3

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

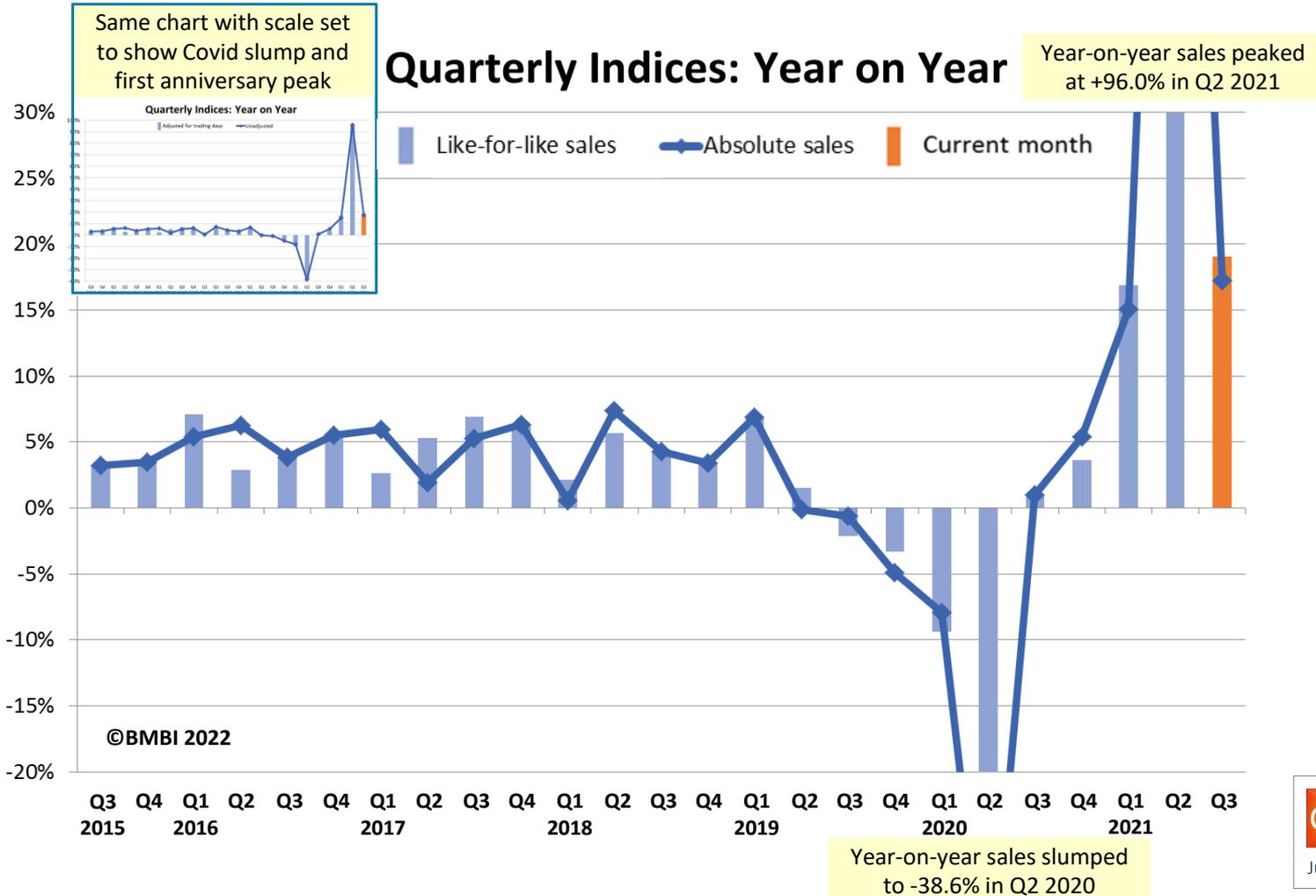


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: Sales Indices

Absolute and like-for-like sales

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



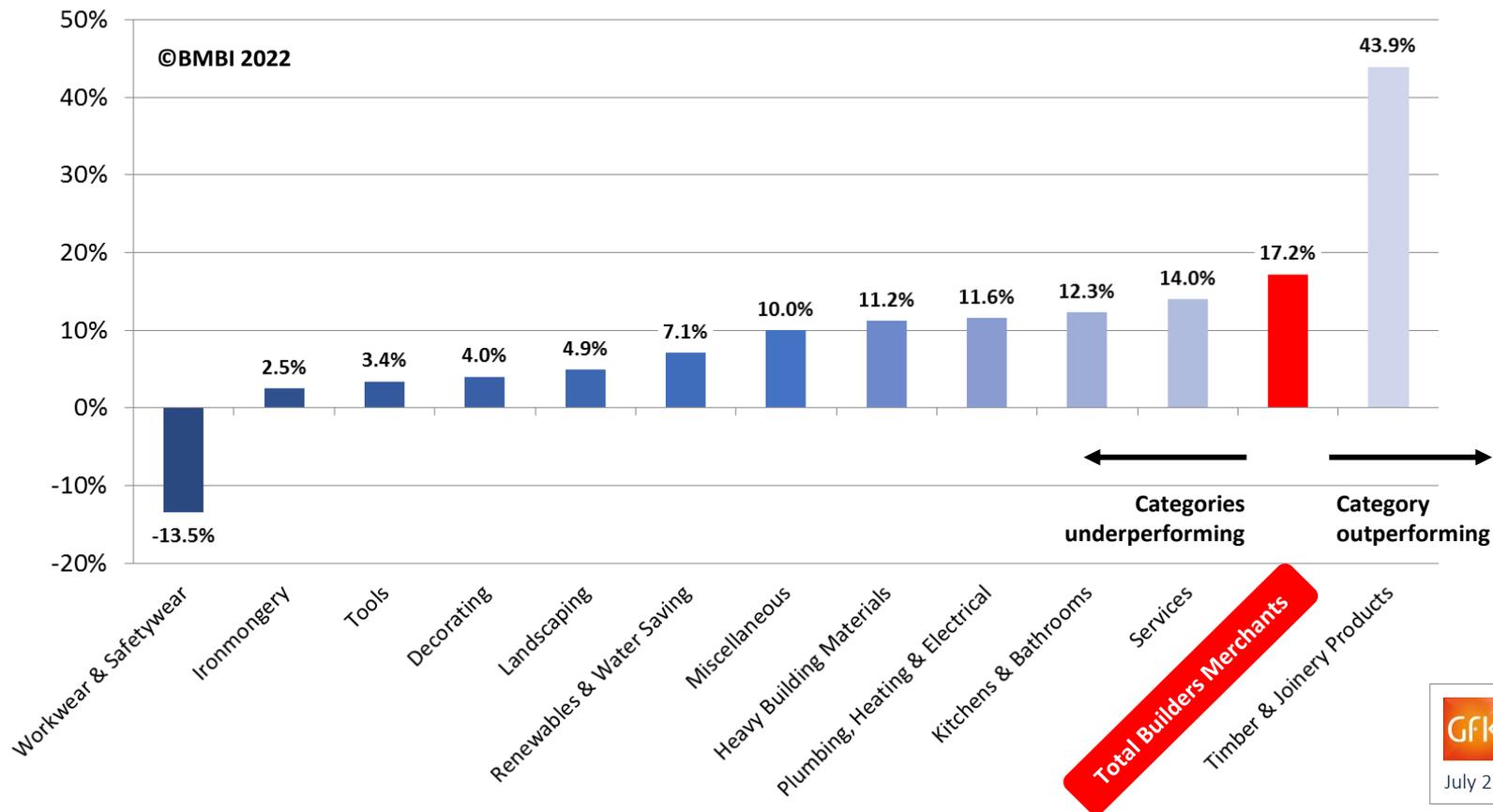
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# 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

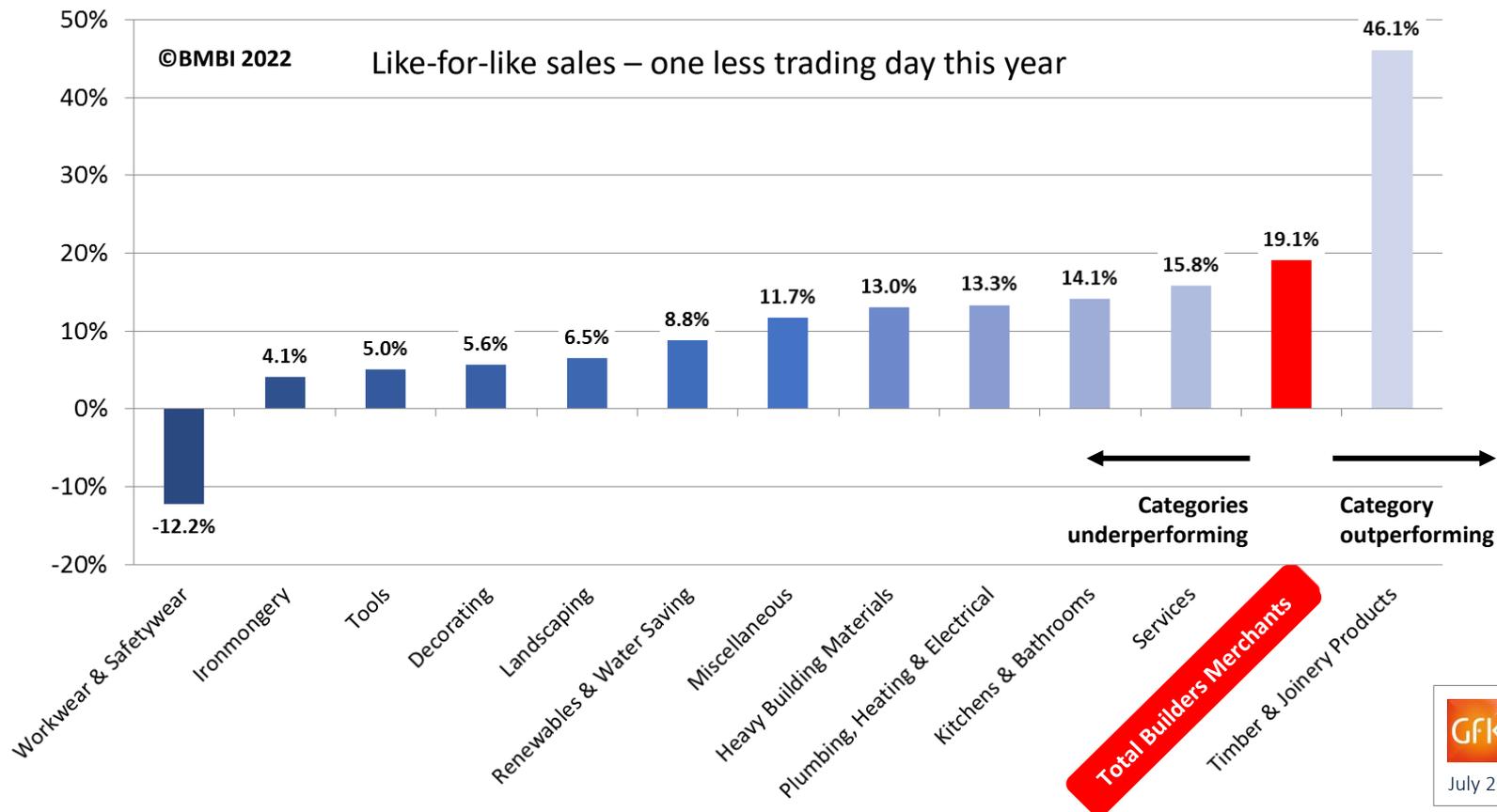
# Quarterly: This Year v Last Year

Q3 2021 like-for-like sales indices



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

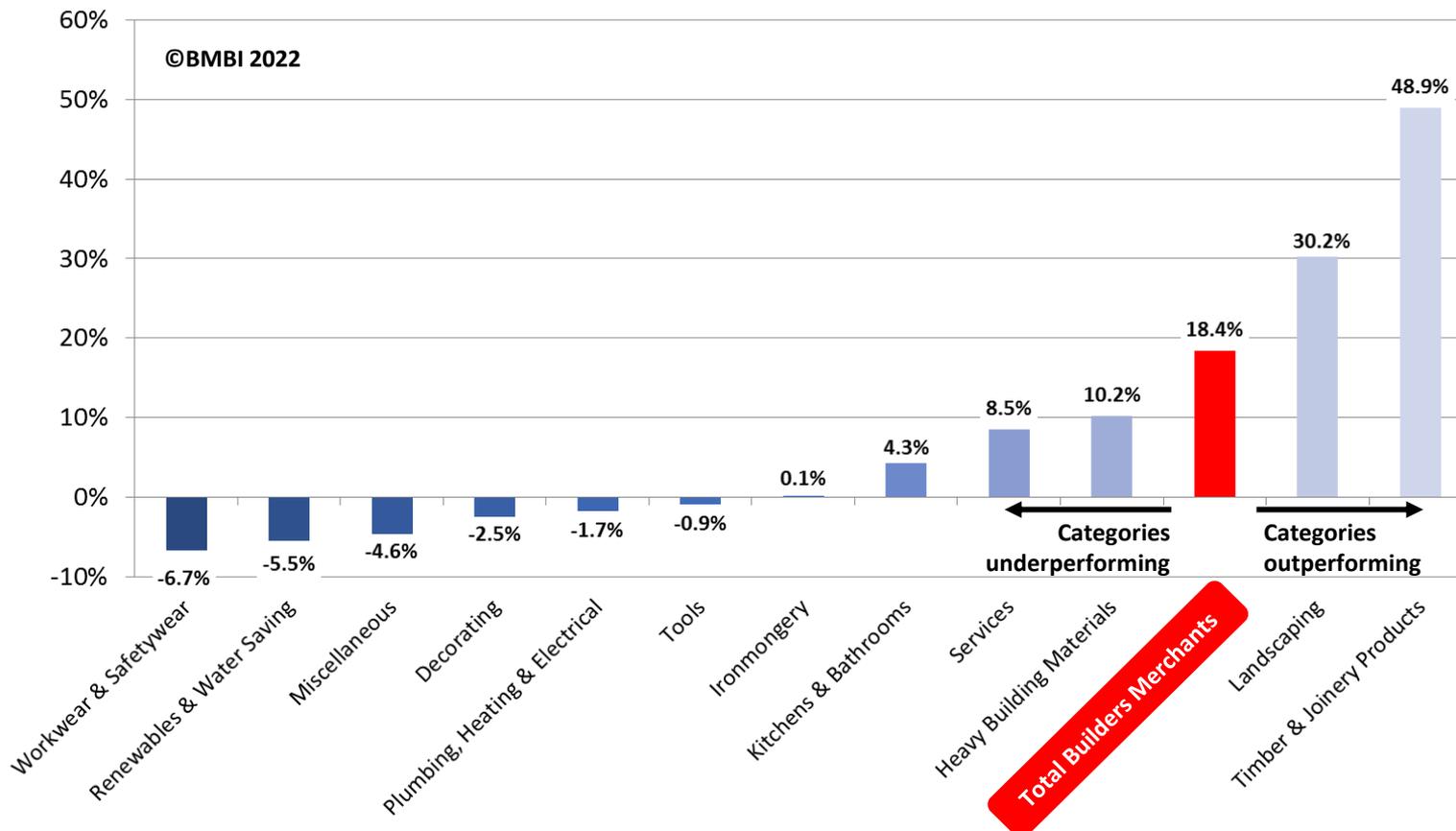
## Quarter 3 2021 index v Quarter 3 2020 index



# 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

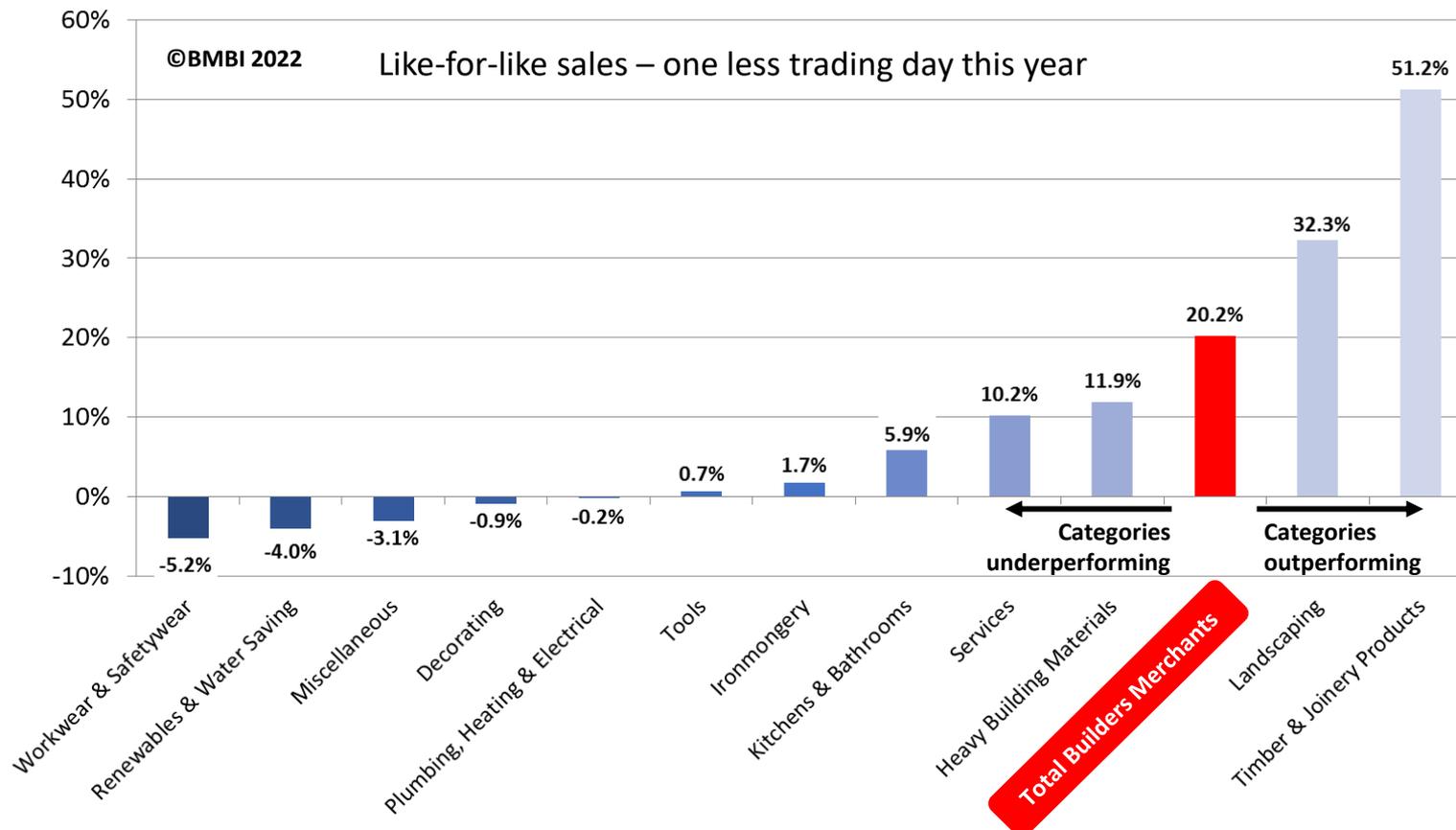
# Quarterly: This Year v 2019

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



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

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



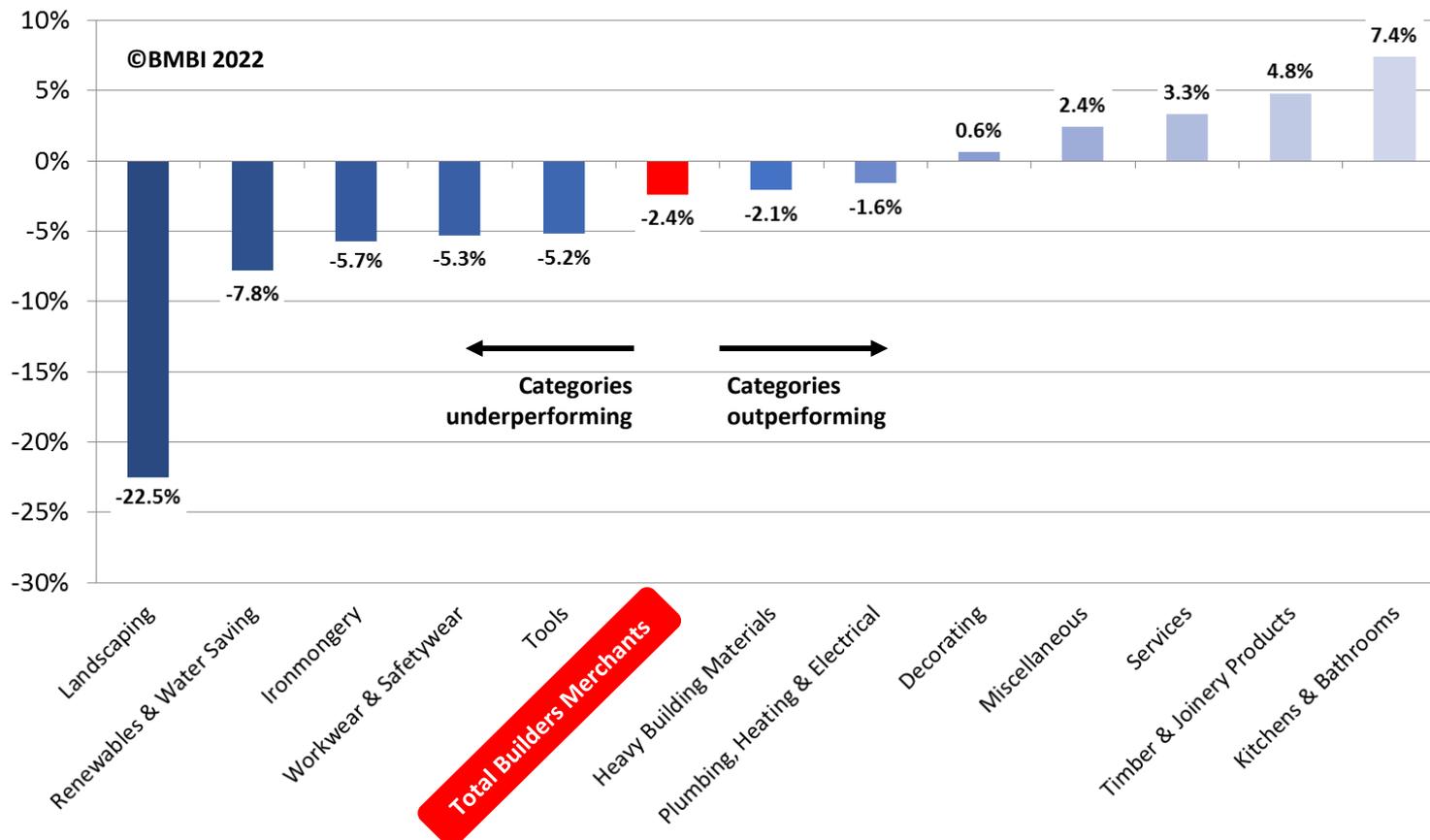
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

# 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

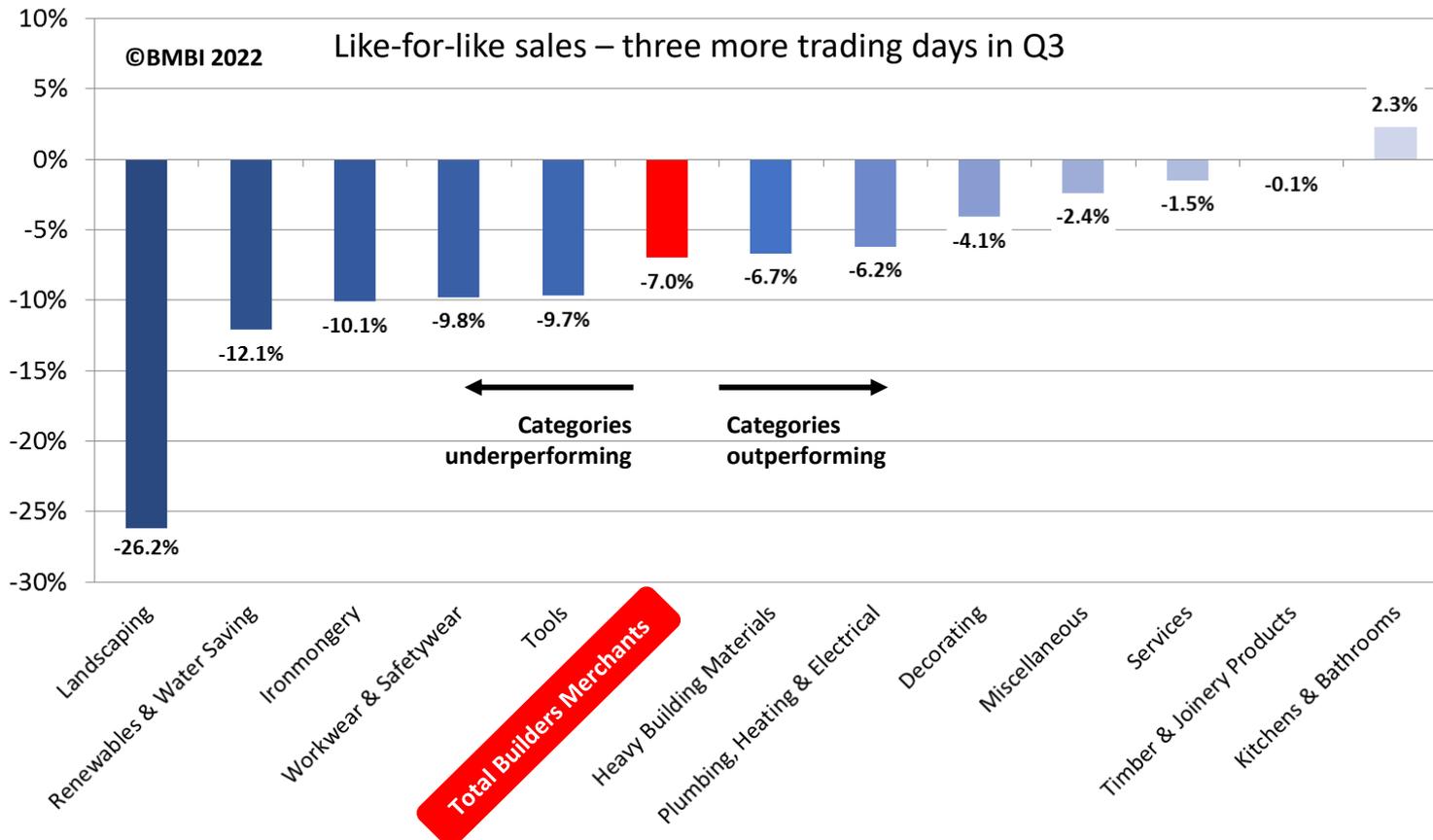
# Quarterly: Quarter on Quarter

## Q3 2021 like-for-like sales indices



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

### Quarter 3 2021 index v Quarter 2 2021 index

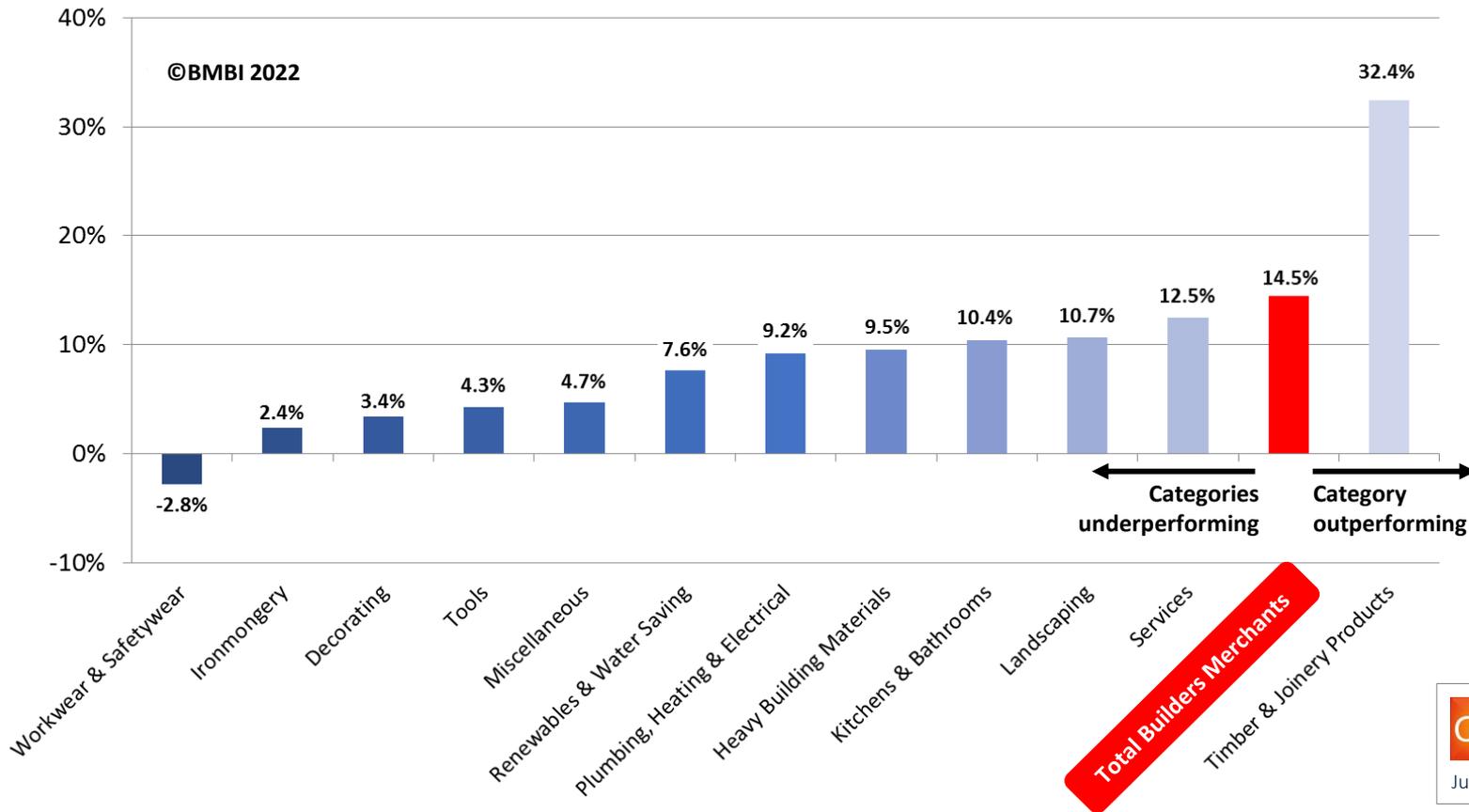


Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

# Latest 3 months: v last year

September to November sales indices

## 3 months Sep 21 to Nov 21 v 3 months Sep 20 to Nov 20

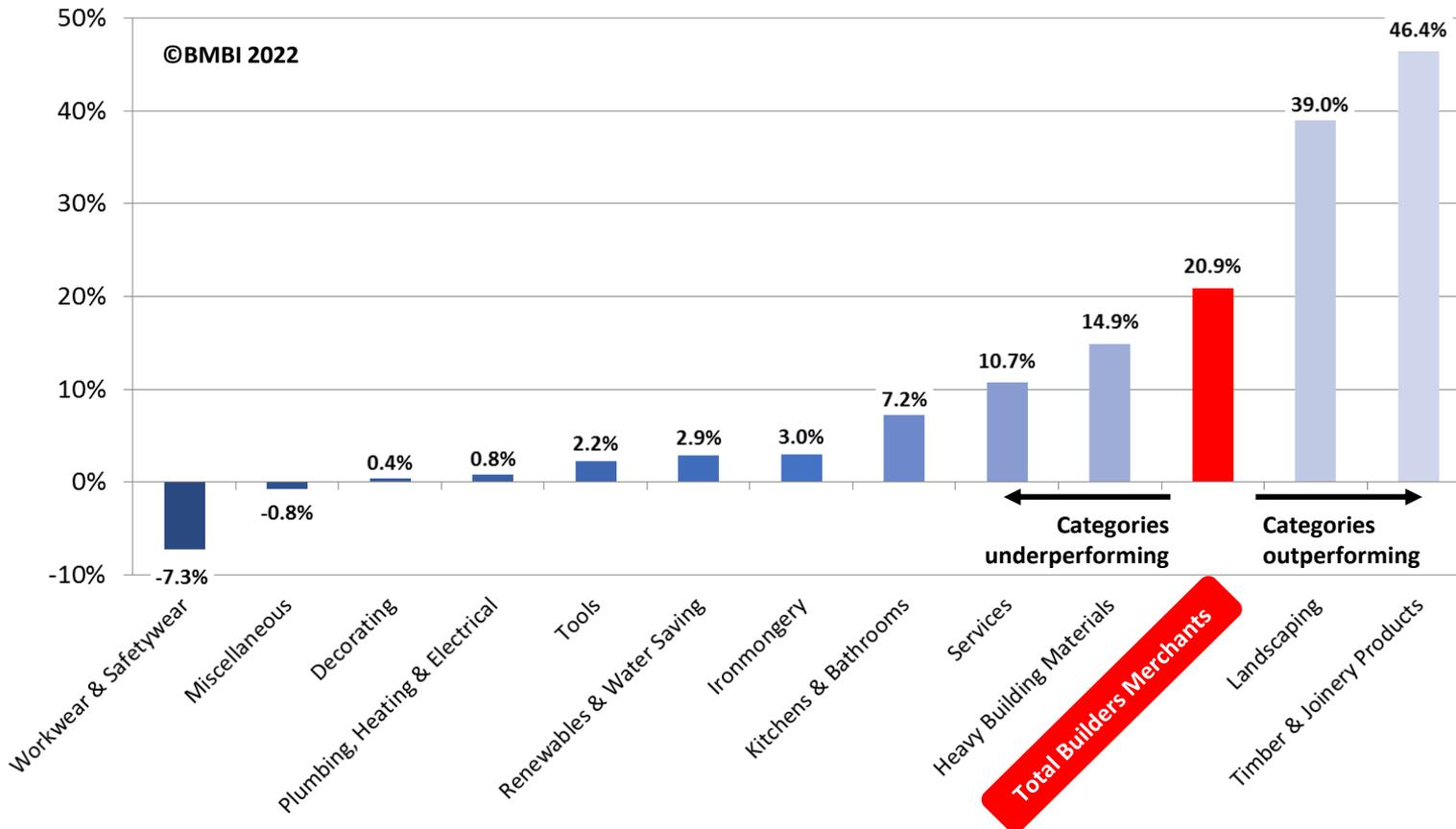


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Latest 3 months: v 2019

September to November 2-year sales indices

## 2-year comparison: Sep 21 to Nov 21 v Sep 19 to Nov 19



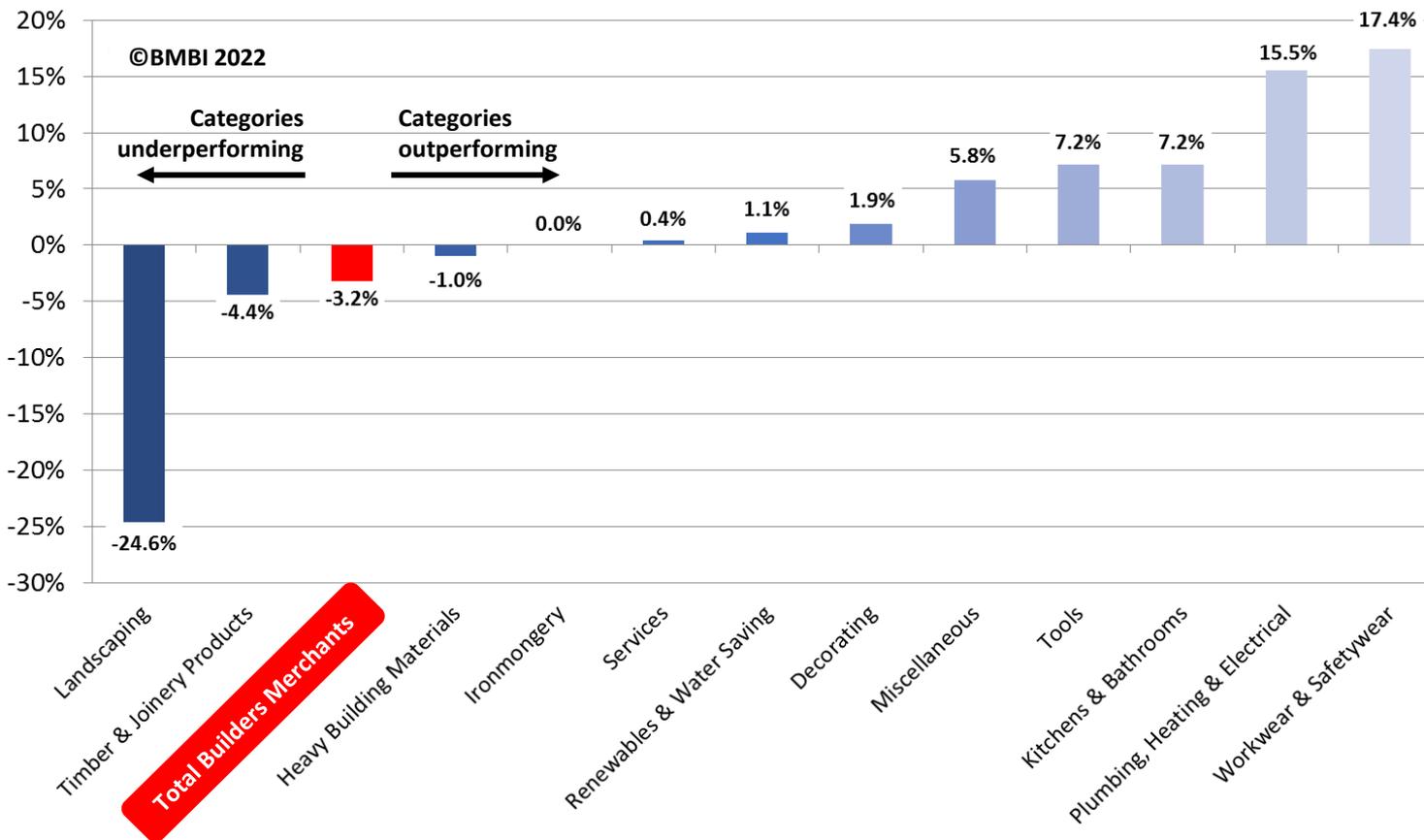
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Latest 3 months: v previous 3 months

September to November sales indices



## 3 months Sep 21 to Nov 21 v 3 months Jun 21 to Aug 21



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

# Latest 3 months: v previous 3 months

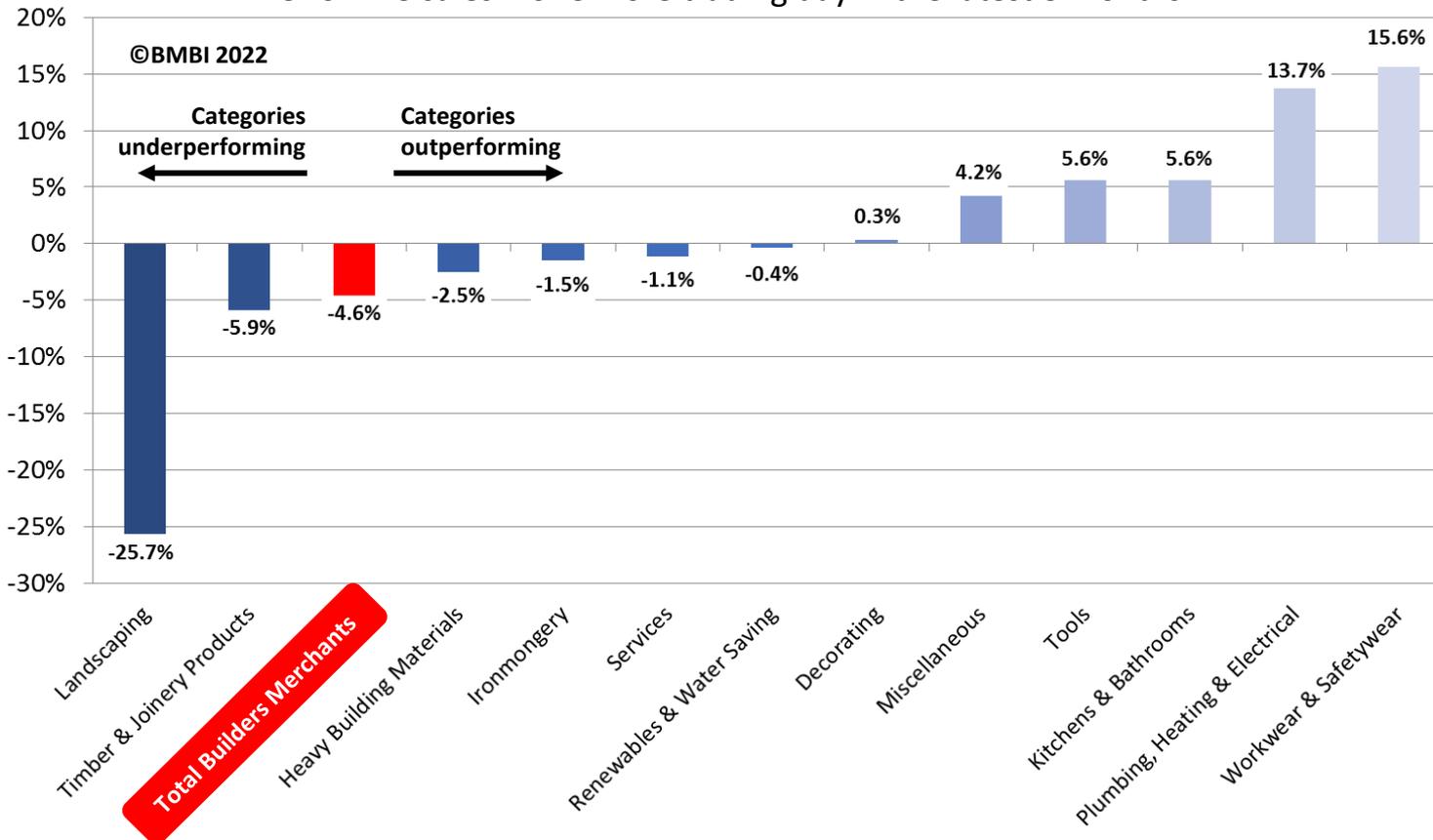
September to November like-for-like sales indices



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

## 3 months Sep 21 to Nov 21 v 3 months Jun 21 to Aug 21

Like-for-like sales – one more trading day in the latest 3 months

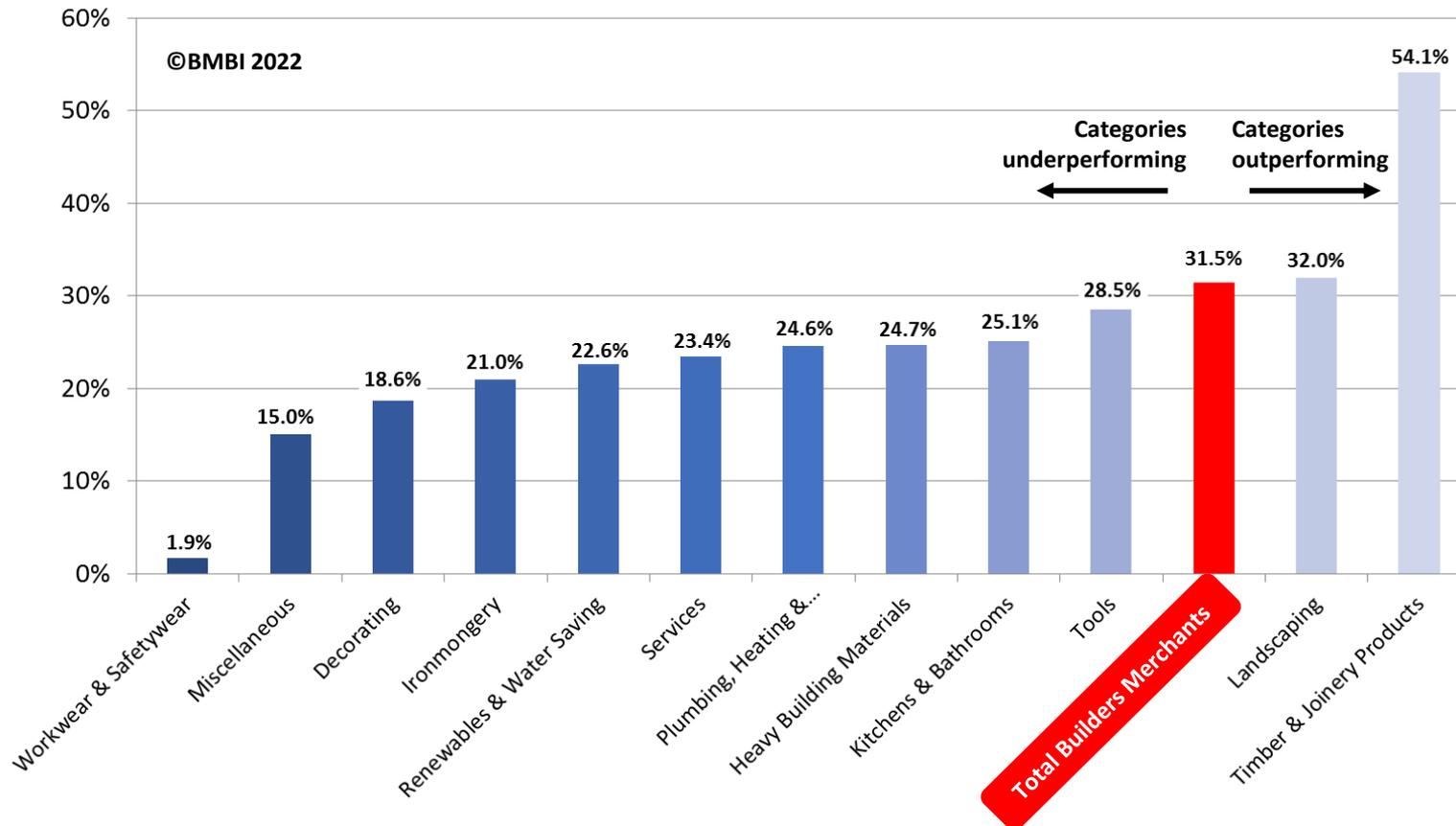


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Year to date: Year on Year

Last 11 months sales indices

## Year to date: Jan 21 to Nov 21 index v Jan 20 to Nov 20 index



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

# Year to date: Year on Year

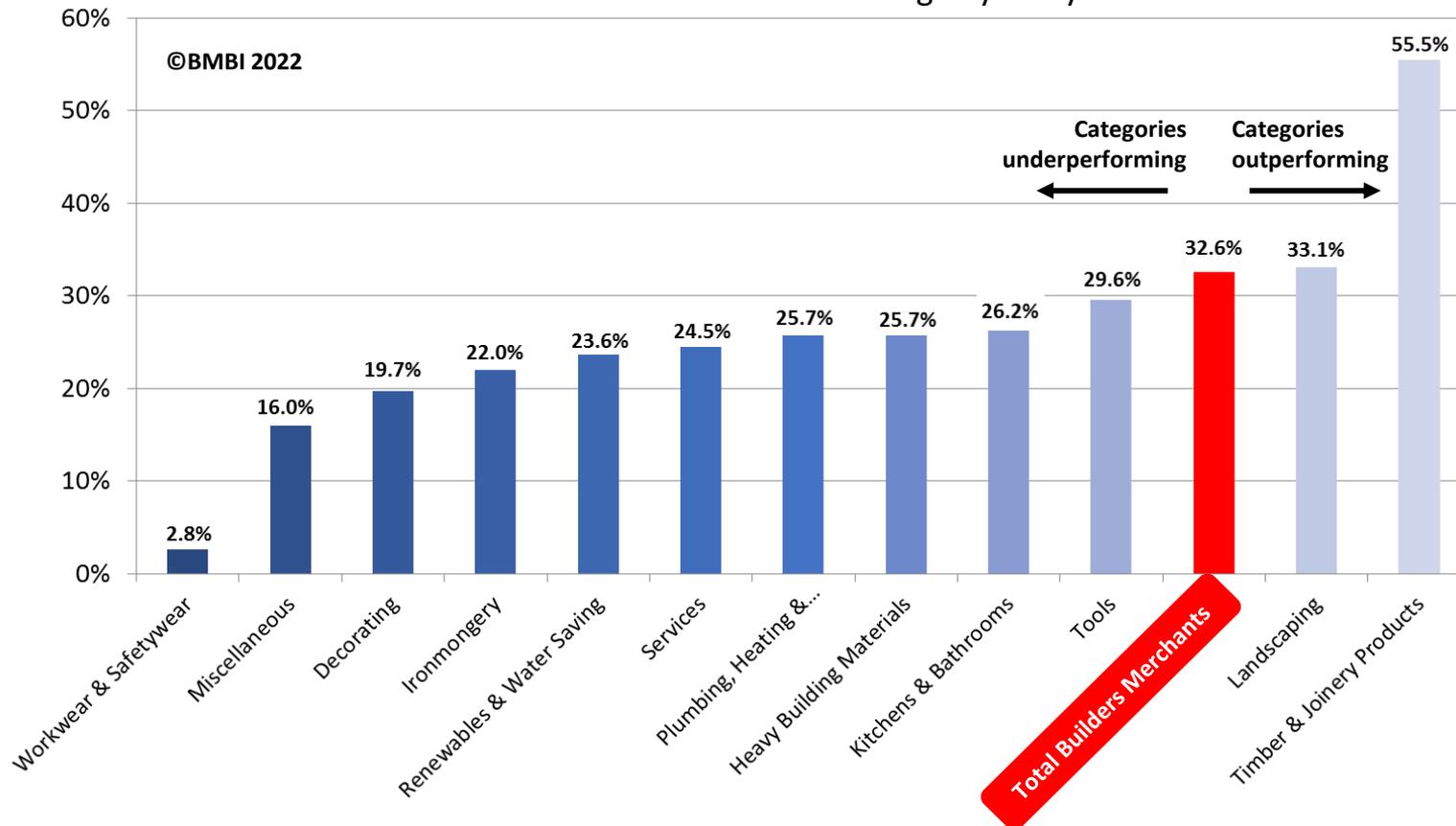
Last 11 months like-for-like sales indices



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

## Year to date: Jan 21 to Nov 21 index v Jan 20 to Nov 20 index

Like-for-like sales – two less trading day this year

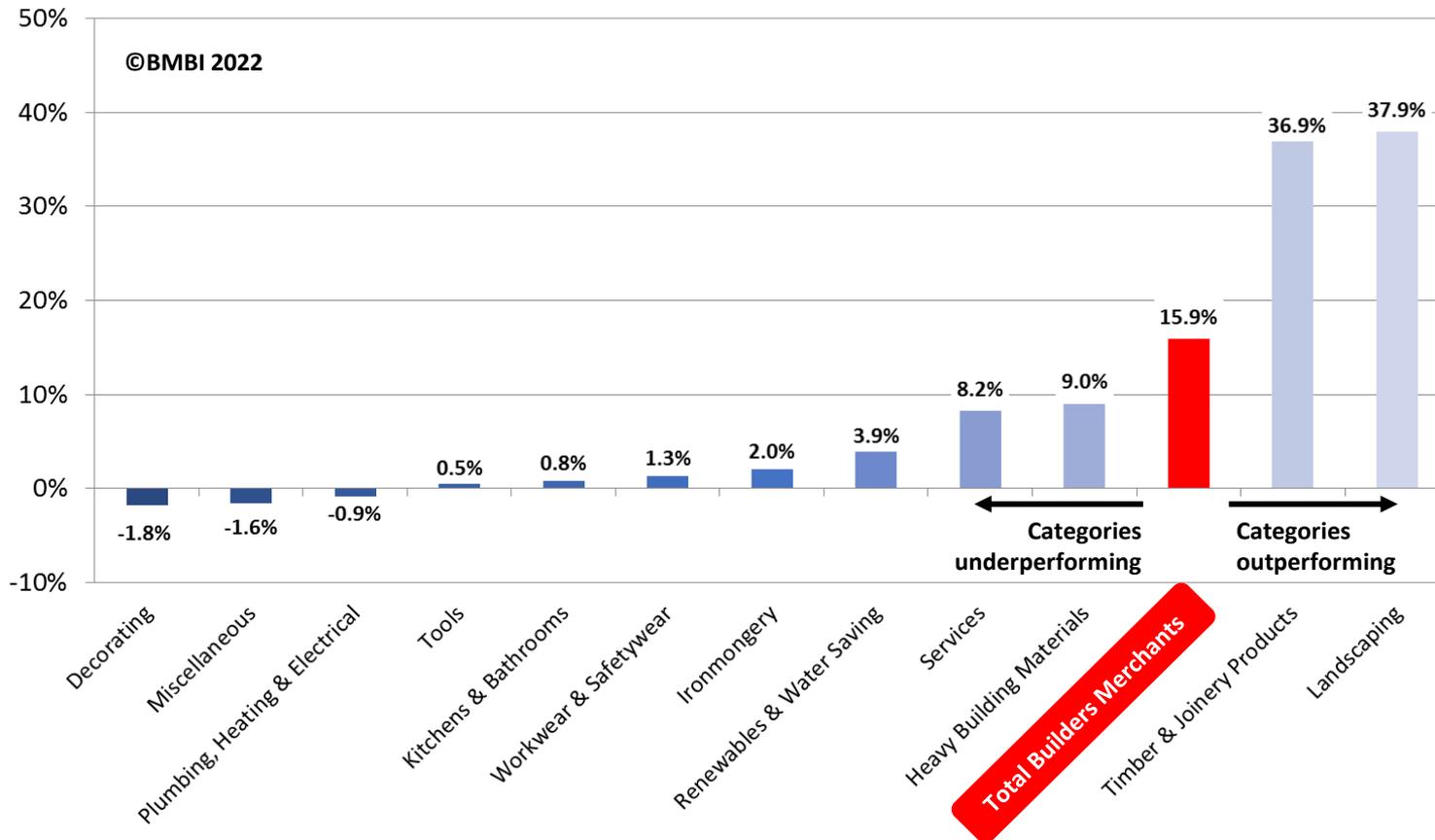


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Year to date: v 2019

Last 11 months 2-year sales indices

## 2-year comparison: Jan 21 to Nov 21 v Jan 19 to Nov 19



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

# Year to date: v 2019

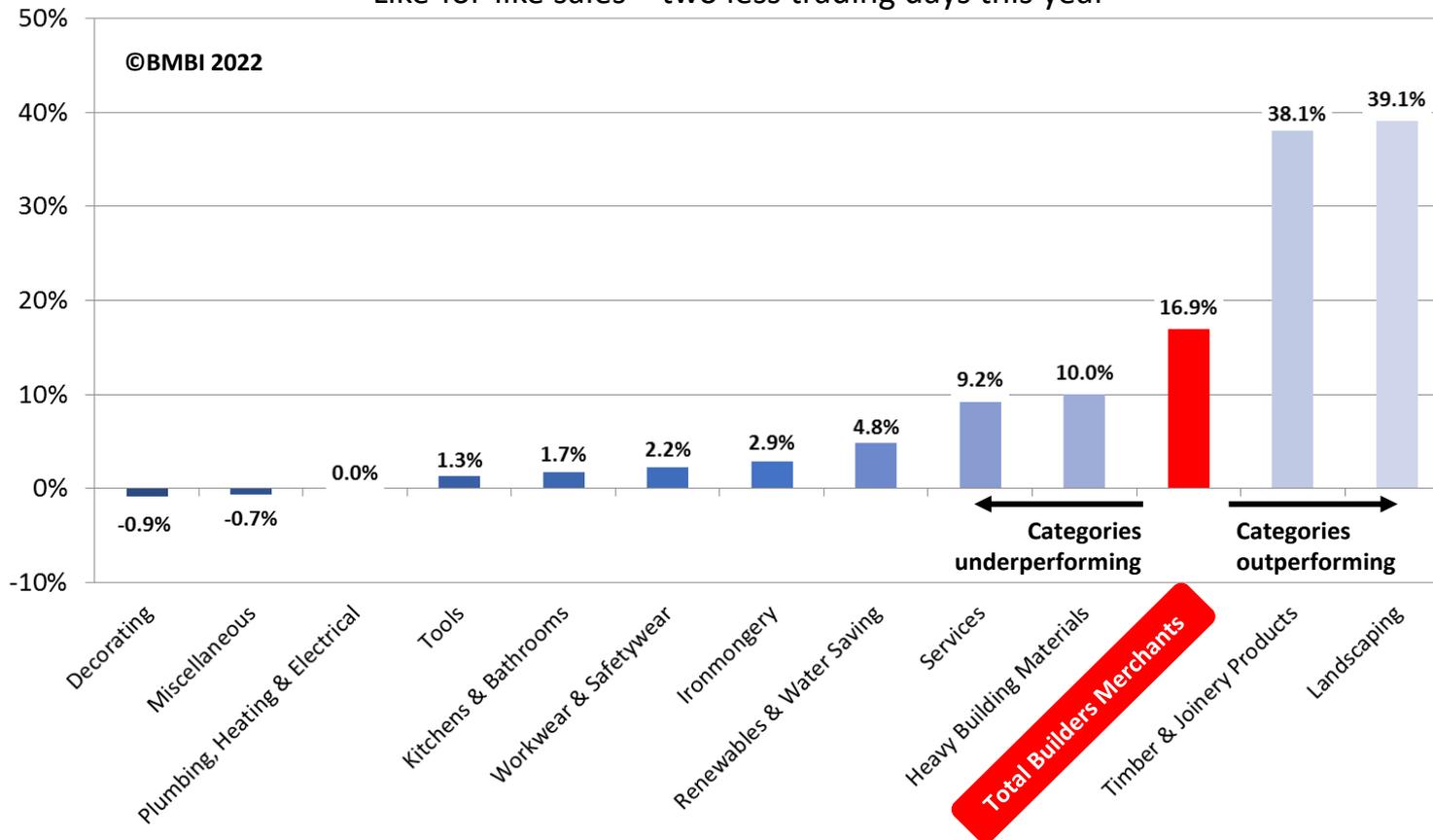
Last 11 months 2-year like-for-like sales indices



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

## 2-year comparison: Jan 21 to Nov 21 v Jan 19 to Nov 19

Like-for-like sales – two less trading days this year

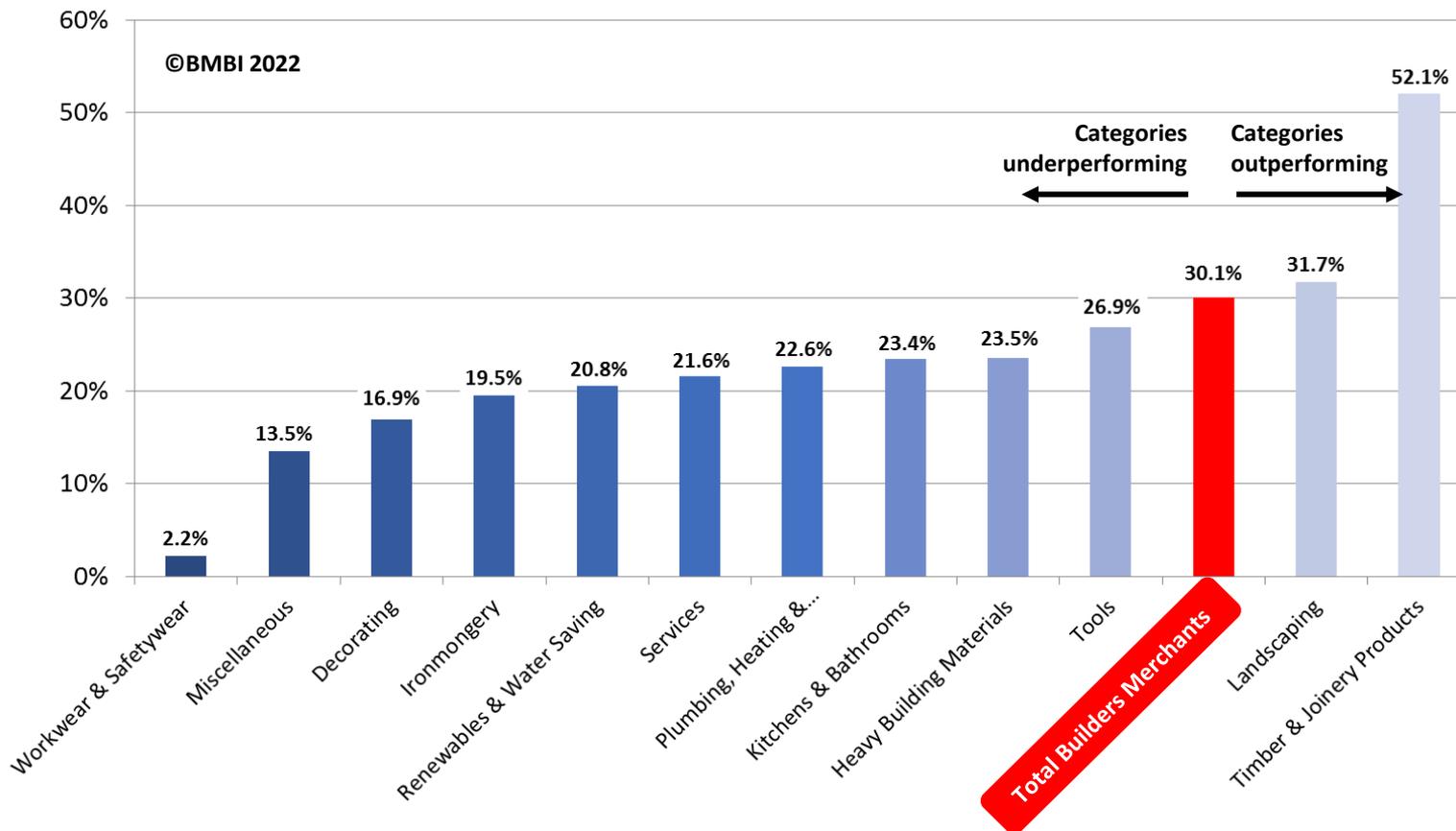


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Last 12 months: Year on Year

MAT sales indices

## 12 months Dec 20 to Nov 21 v 12 months Dec 19 to Nov 20



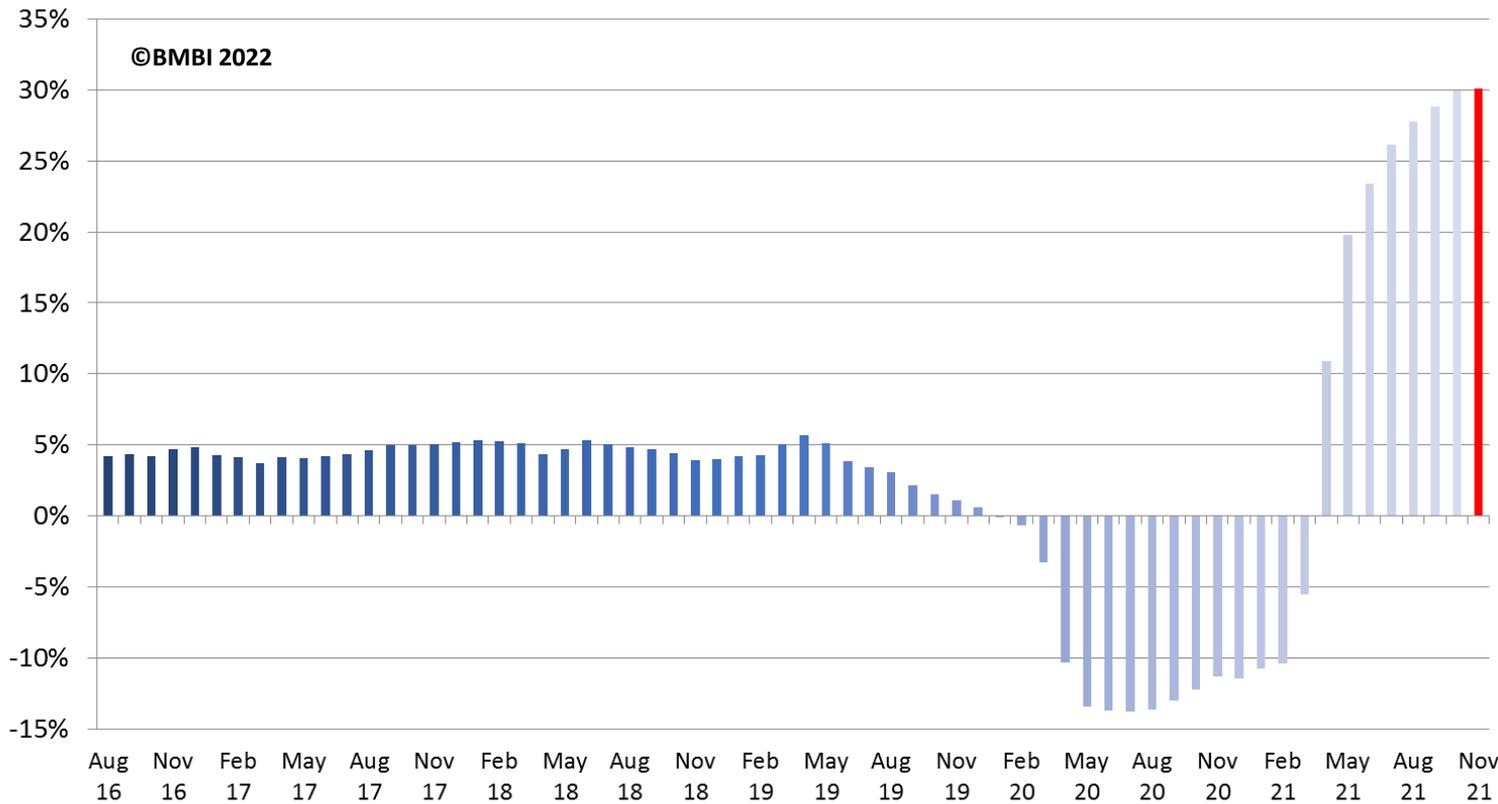
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# 12 months: Year on Year

MAT sales indices



## MAT: Total Builders Merchants August 2016 to November 2021

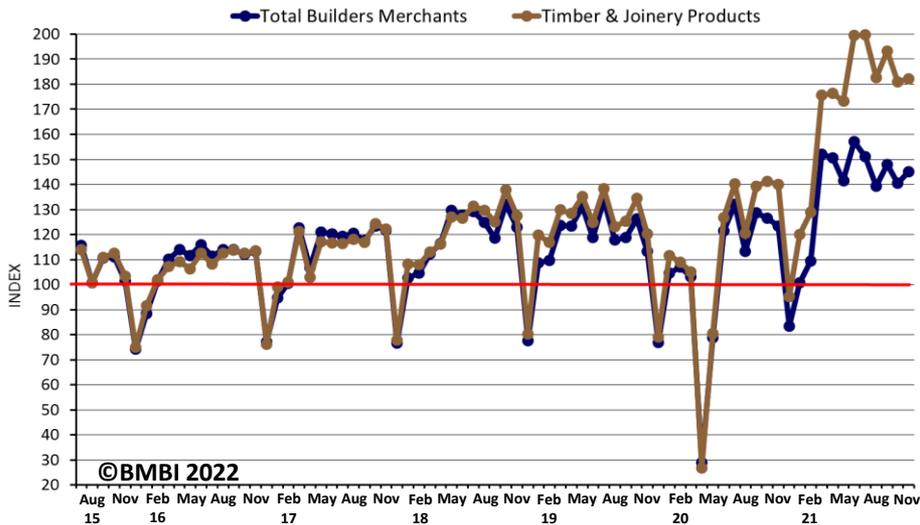


**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Indices

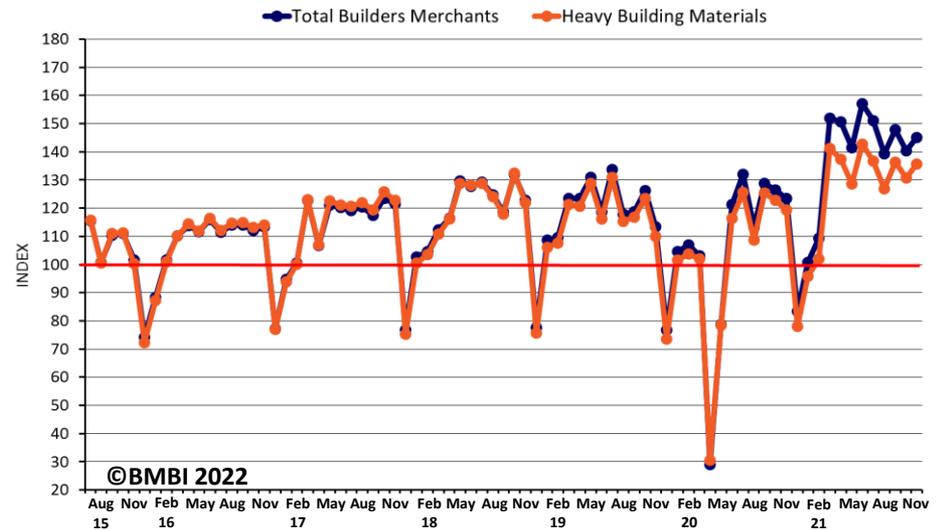
November 2021

## Timber & Joinery Products



Indexed on July 2014 – June 2015

## Heavy Building Materials



Indexed on July 2014 – June 2015

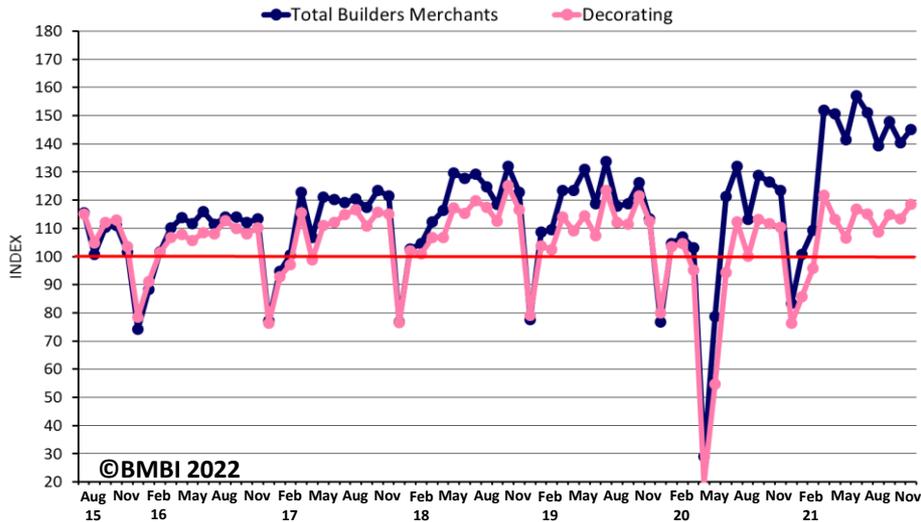
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Indices

November 2021

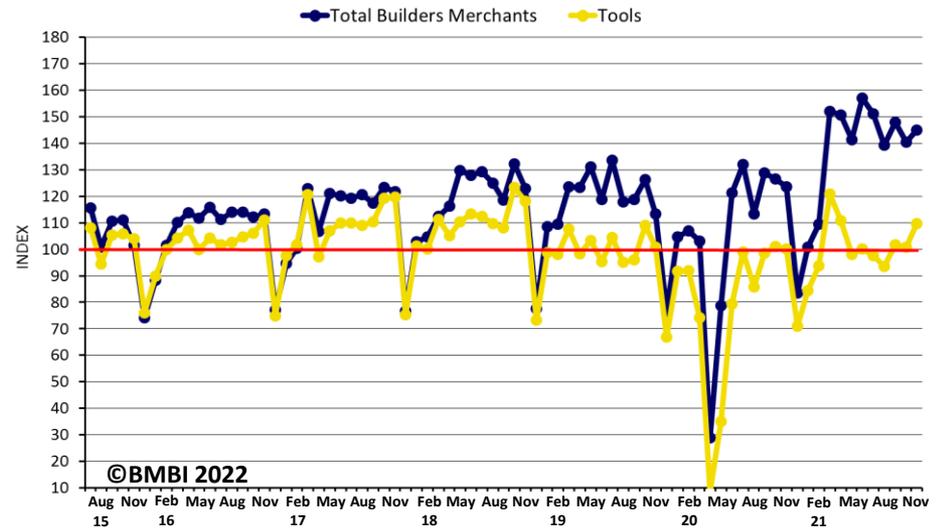


## Decorating



Indexed on July 2014 – June 2015

## Tools



Indexed on July 2014 – June 2015

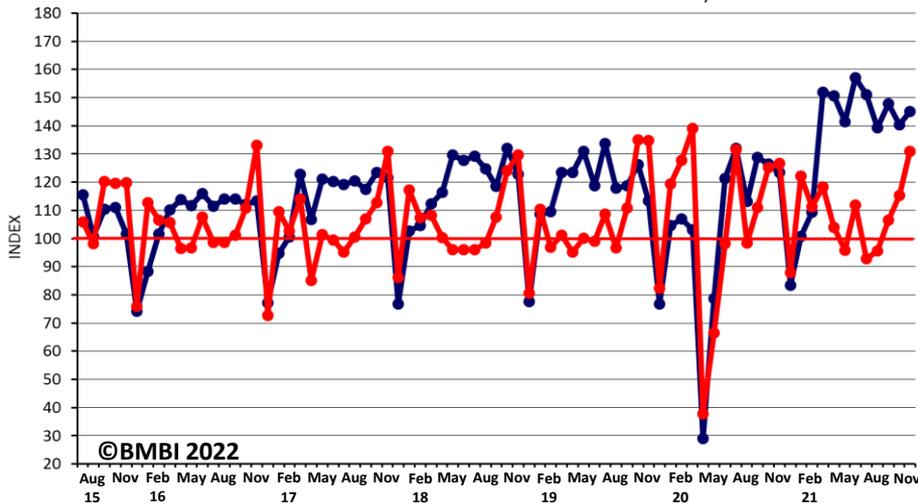
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Indices

November 2021

## Workwear & Safetywear

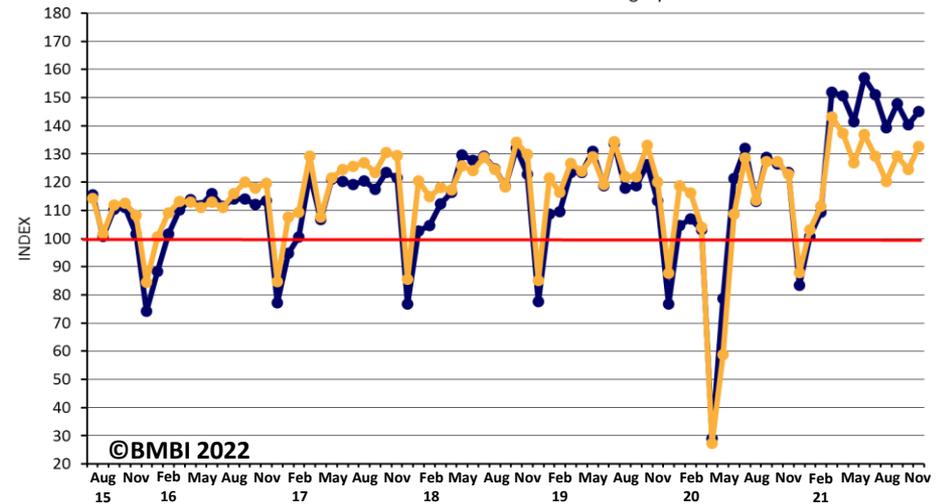
— Total Builders Merchants — Workwear & Safetywear



Indexed on July 2014 – June 2015

## Ironmongery

— Total Builders Merchants — Ironmongery



Indexed on July 2014 – June 2015

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

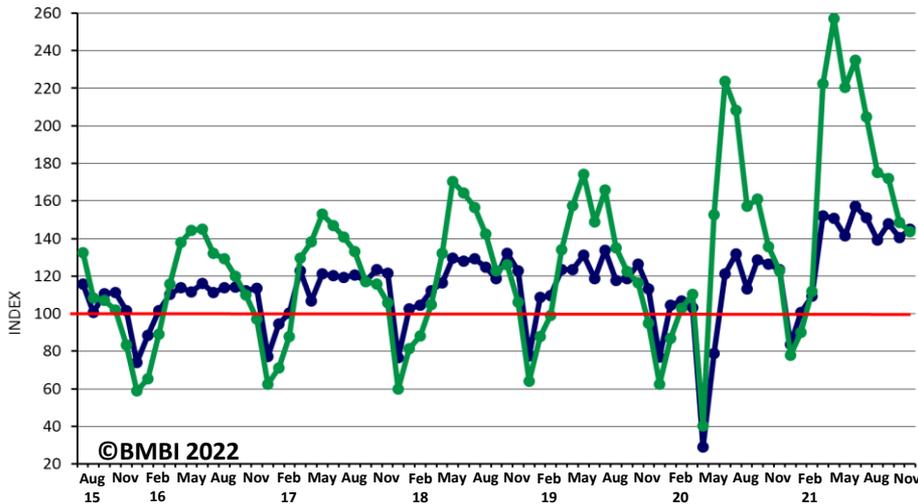
# Monthly: Indices

November 2021



## Landscaping

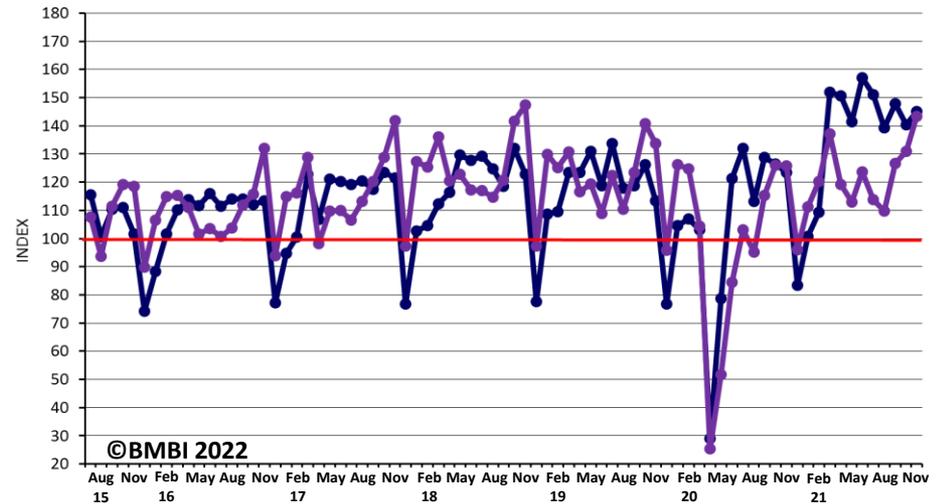
● Total Builders Merchants ● Landscaping



Indexed on July 2014 – June 2015

## Plumbing, Heating & Electrical

● Total Builders Merchants ● Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

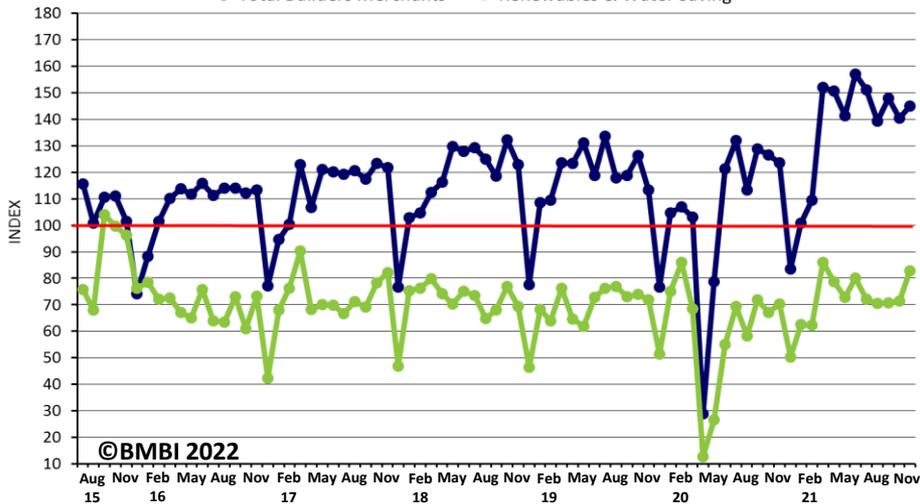
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2021

# Monthly: Indices

November 2021

## Renewables & Water Saving

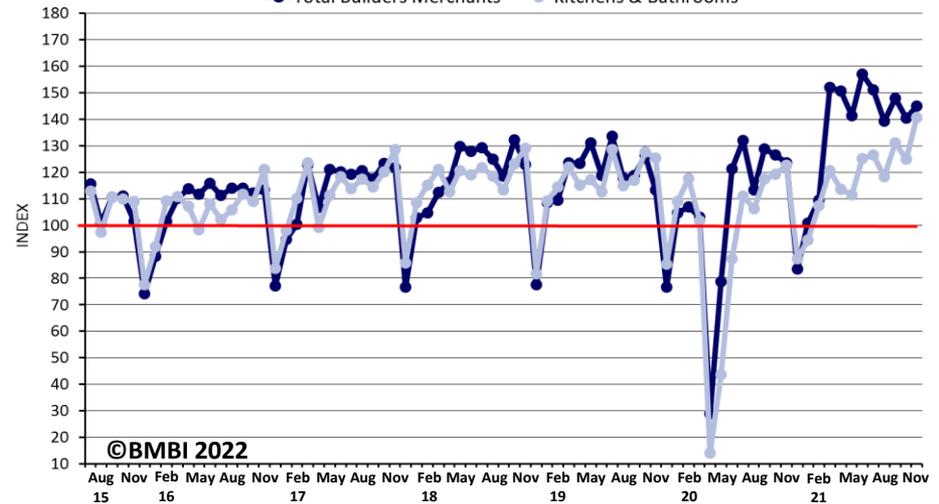
■ Total Builders Merchants ■ Renewables & Water Saving



Indexed on July 2014 – June 2015

## Kitchens & Bathrooms

■ Total Builders Merchants ■ Kitchens & Bathrooms

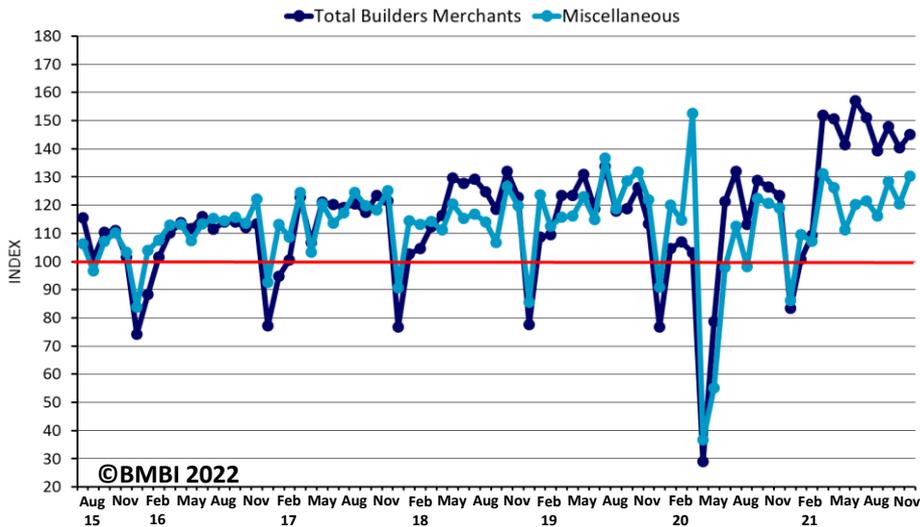


Indexed on July 2014 – June 2015

# Monthly: Indices

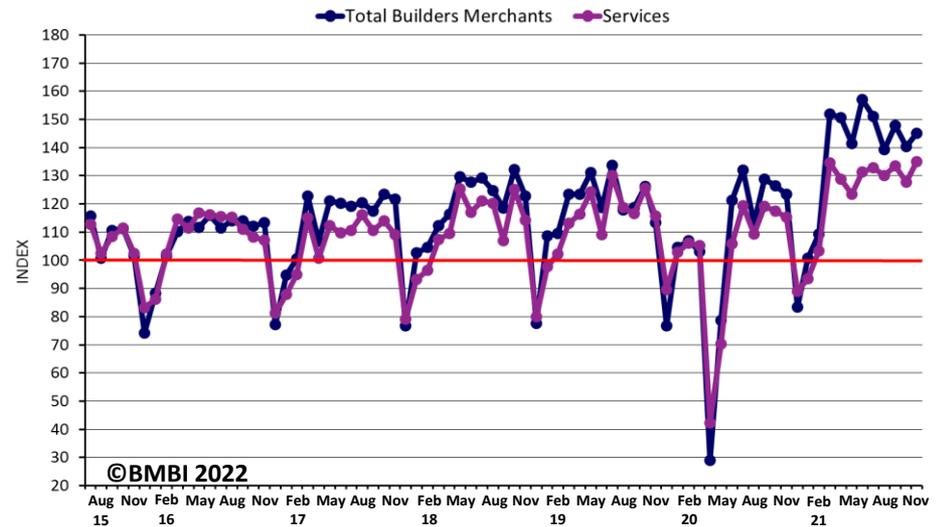
November 2021

## Miscellaneous



Indexed on July 2014 – June 2015

## Services



Indexed on July 2014 – June 2015

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

# Trading Days



## Monthly

Index: 20.8

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	21	22	

## Quarterly

Index: 62.3

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

2019	
H1	H2
124	124
2020	
H1	H2
125	125
2021	
H1	H2
124	

## Full Year

2019
248
2020
250
2021

\*Due to the Covid-19 pandemic, some merchants temporarily closed branches in the period March to May 2020, hence their trading days may have differed from the standard numbers shown above.

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

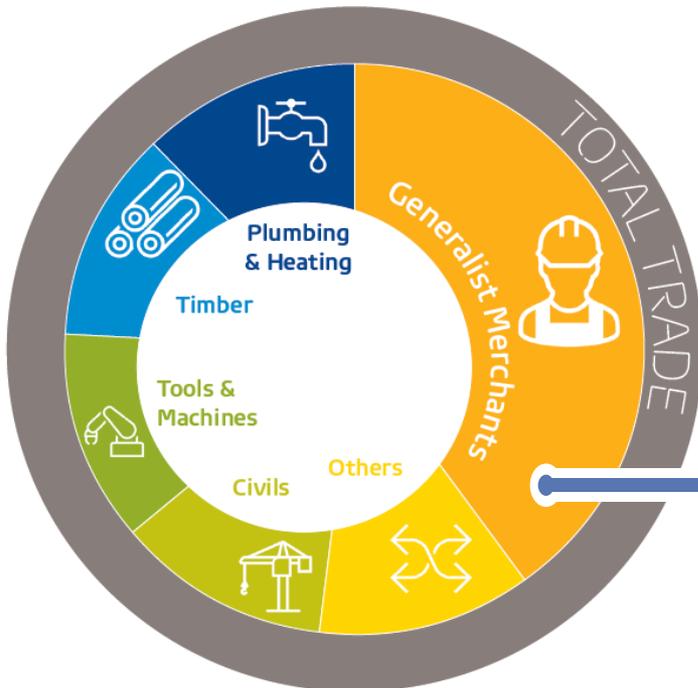
# GfK's Definition of Builders Merchant Panel



## Generalist Builders Merchants definition:

- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users. Only multiple merchants are considered; they are defined as having more than 3 outlets or a turnover of greater than £3m p.a.
- This excludes branches that generate all their sales from specialized areas such as Civils, Tiles and Tools. Estimated coverage of this channel sits at 82%.

Examples include:



# GfK Insights Methodology



GfK collect live sales-out data from our panel of merchant partners.

We add value to that data through the application of each sold product's unique technical features. We compare like-for-like products and categories from like-for-like merchants and aggregate this within our reports.

Our international methodology is based on robust scientific principles and delivers continuous, reliable information that can be applied to your business requirements.

# GfK's Product Categories

Reports cover category headline values & in-depth, brand-level insights



## Headline values available

### Timber & Joinery Products

Timber  
Sheet Materials  
Cladding  
Flooring & Flooring Accessories  
Mouldings  
Stairs & Stairparts  
Window & Frames  
Doors/Door Frames

### Heavy Building Materials

Bricks Blocks & Damp Proofing  
Drainage/Civils/Guttering  
Lintels  
Cement/Aggregate/Cement Accs  
Concrete Mix/Products  
Plasters Plasterboards and Accessories  
Roofing Products  
Insulation  
Cement Mixers/Mixing Buckets Products  
Builders Metalwork  
Other Heavy Building Equipment/Material

### Decorating

Paint/Woodcare  
Paint Brushes Rollers & Pads  
Adhesives/Sealants/Fillers  
Tiles And Tiling Accessories  
Decoration Preparation & Decorating Sundries  
Wall Coverings

### Tools

Hand Tools  
Power Tools  
Power Tool Accessories  
Ladders & Access Equipment

### Workwear And Safetywear

Clothing  
Safety Equipment

### Ironmongery

Fixings And Fastenings  
Security  
Other Ironmongery

### Landscaping

Garden Walling/Paving  
Driveways/Block Paving/Kerbs  
Decorative Aggregates  
Fencing And Gates  
Decking  
Other Gardening Equipment

### Plumbing Heating & Electrical

Plumbing Equipment  
Boilers Tanks & Accessories  
Heating Equipment/Water Heaters/Temperature Control/Air Treatment  
Radiators And Accessories  
Electrical Equipment  
Lighting And Light Bulbs

### Renewables And Water Management

Water Saving  
Renewables & Ventilation

### Kitchens & Bathrooms

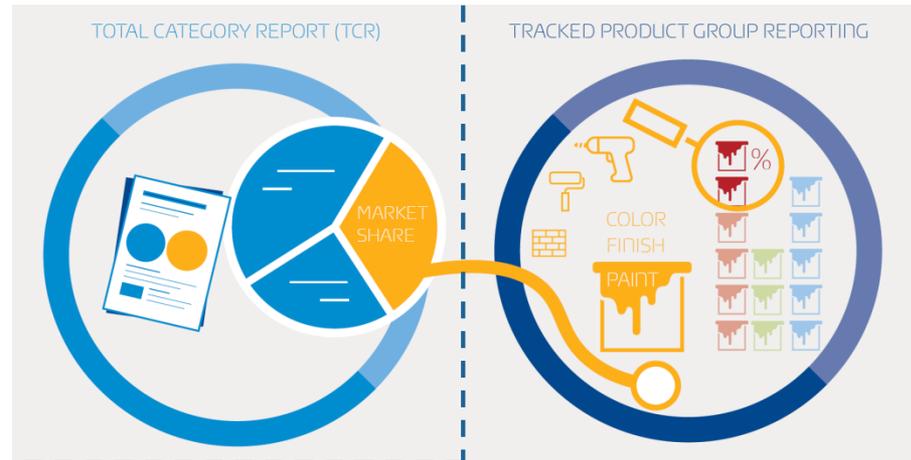
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

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

### Services

Toolhire / Hire Services  
Other Services



## 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](mailto:emile.van-der-ryst@gfk.com)

## Available categories:

### Heavyside

Bricks  
Insulation

### Lightside

Emulsion Paints (incl. Masonry & Base)  
Trim Paints  
Primers/Undercoats  
Woodcare  
Adhesives  
Sealants  
Fillers/PU Foam  
Tile Fixing (Adhesives/Grout)

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**November 2021**

(Published 20 January 2022)

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](mailto:ralph@mra-research.co.uk)

### More data available

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

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

### Record PHMI month for plumbing and heating merchants

Total plumbing and heating value sales, from over 80% of specialist Plumbing & Heating merchants throughout Great Britain, were 9.0% higher in November 2021 compared to November 2020 (see [page 59](#)), with one more trading day this year. November's sales were the highest month since PHMI started in January 2019. Like-for-like sales, which take trading day differences into account, were 4.1% higher. Compared with two years ago, total value in November 2021 was 6.1% higher than in November 2019, with one more trading day ([page 60](#)). Like-for-like sales were 1.3% higher.

Total value sales in November were 9.1% higher than in October, with one more trading day this month ([page 61](#)). Like-for-like sales were 4.1% higher.

November's PHMI Index, which contrasts sales with the base period of January to December 2019, was 121.2, with one more trading day – see the table on [page 57](#) and the chart on [page 58](#).

Sales in the three months September to November 2021 were up 2.4% compared with the same three months last year, with no difference in trading days ([page 62](#)).

Compared with the same three months two years ago, total sales in September to November 2021 were up 1.7%, with no difference in trading days.

Sales in the three months September to November were 15.5% higher than in the preceding three months, June to August, with one more trading day in the most recent period ([page 63](#)). Like-for-like sales were up 13.7%.

Sales in the first eleven months of 2021 were 19.9% higher than in Covid-affected January to November 2020, with two less trading days this year ([page 67](#)). Like-for-like sales were 21.0% higher.

Looking back two years, sales in January to November 2021 were 2.5% higher than the same eleven months in 2019, with two less trading days this year ([page 68](#)). Like-for-like sales were 3.4% higher.

Plumbing & Heating Merchants' sales in the 12 months December 2020 to November 2021 were 18.7% ahead of December 2019 to November 2020, with no difference in trading days ([page 69](#)).

Sales in November were 9.0% higher than last year, with the highest monthly revenue since PHMI started in January 2019.

Compared with 2 years ago, sales were 6.1% higher than in November 2019.

# Indices: Monthly and quarterly

December 2020 to November 2021

(Indexed on January to December 2019)

<b>Dec 20</b>	<b>Jan 21</b>	<b>Feb 21</b>	<b>Three months</b>
83.9	99.4	102.4	95.2
<b>Mar 21</b>	<b>Apr 21</b>	<b>May 21</b>	<b>Three months</b>
118.2	101.8	97.4	105.8
<b>Jun 21</b>	<b>Jul 21</b>	<b>Aug 21</b>	<b>Three months</b>
99.2	99.6	93.0	97.3
<b>Sep 21</b>	<b>Oct 21</b>	<b>Nov 21</b>	<b>Three months</b>
104.8	111.1	121.2	112.3

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

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

- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, November's' index of 121.1 means turnover was 21.2% 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.

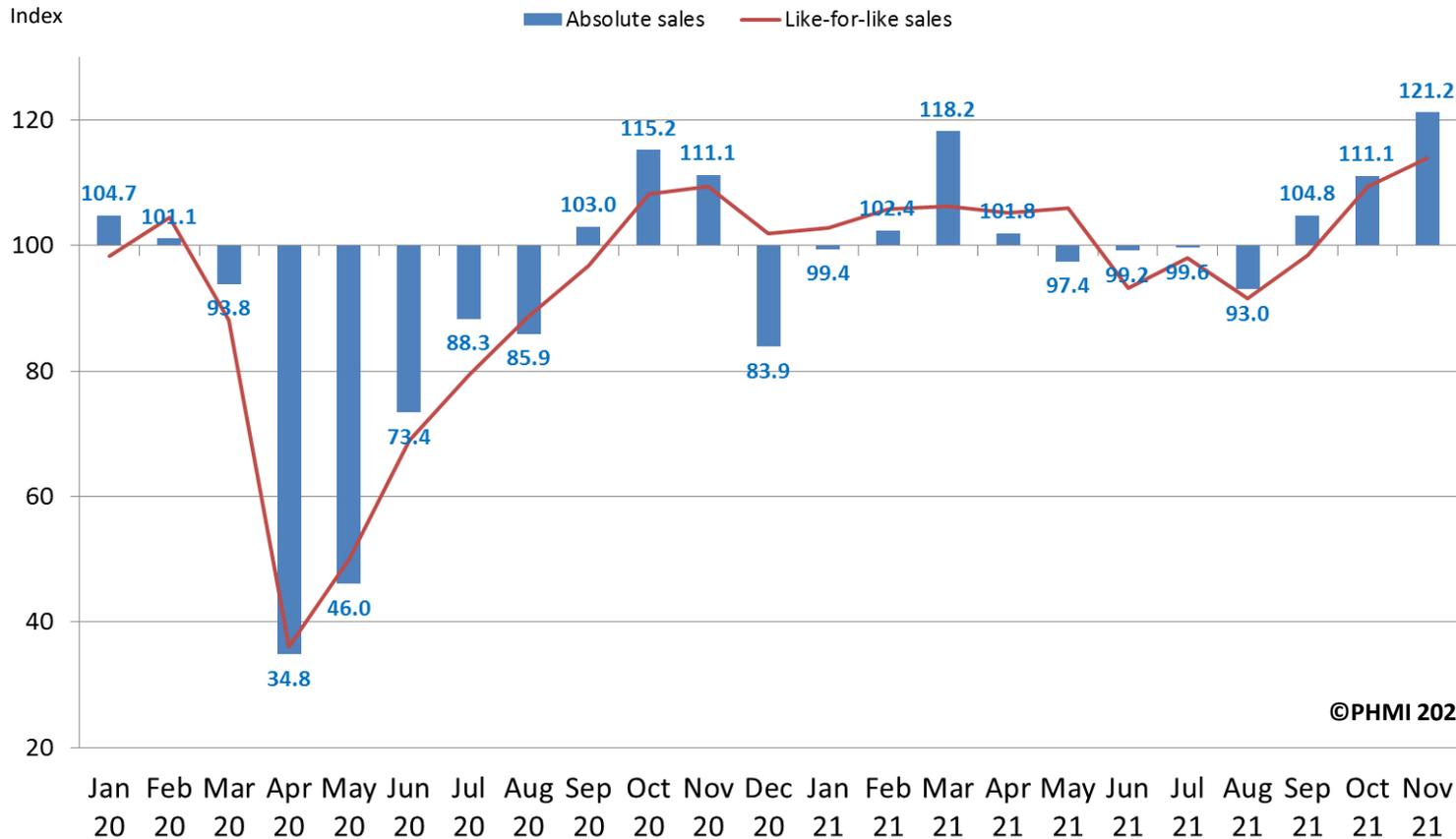
 **Source:** GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Nov 2021

# 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 November 2021



Values shown for absolute sales

©PHMI 2022

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

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

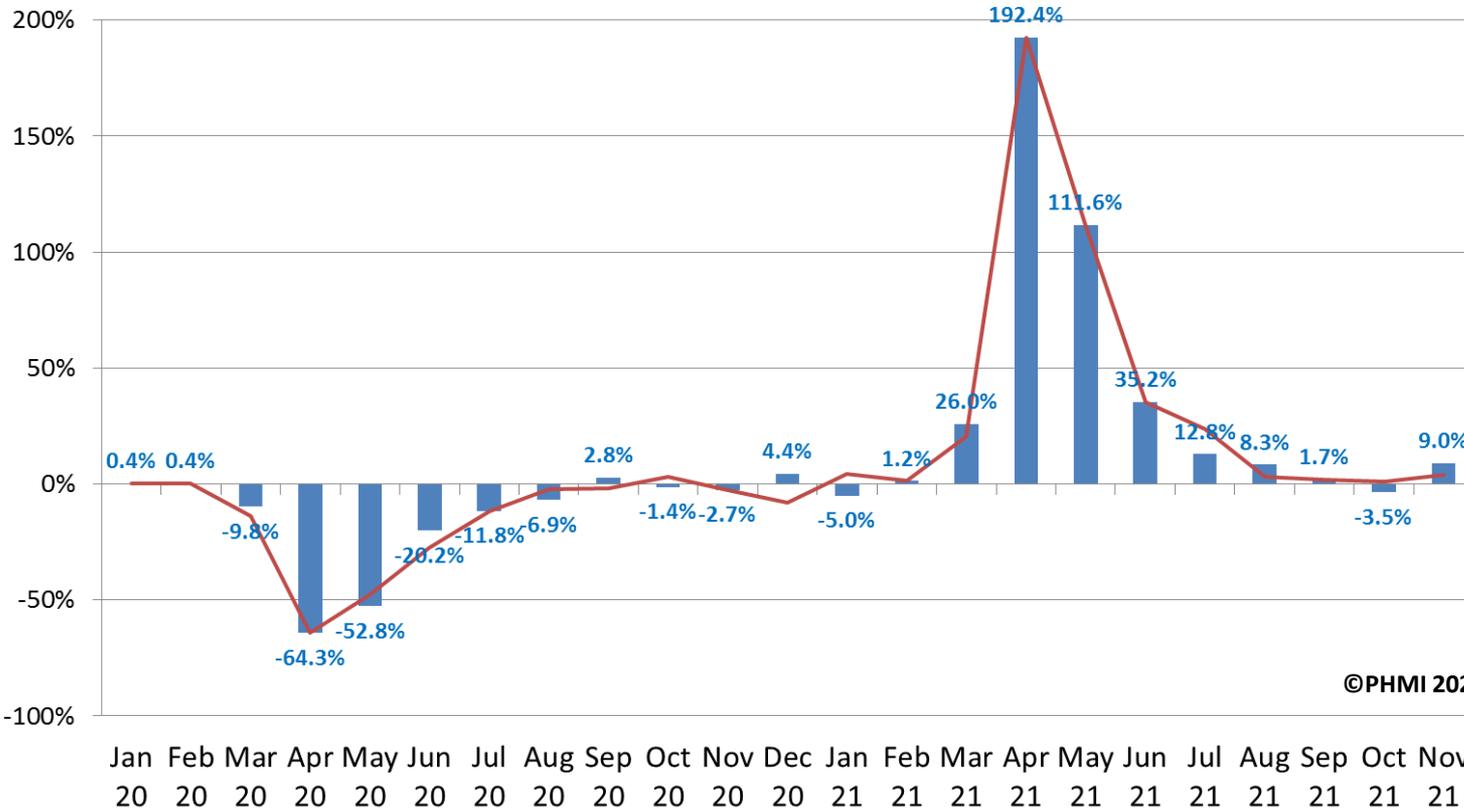
# Monthly: This Year v Last Year

## 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 absolute sales

©PHMI 2022

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

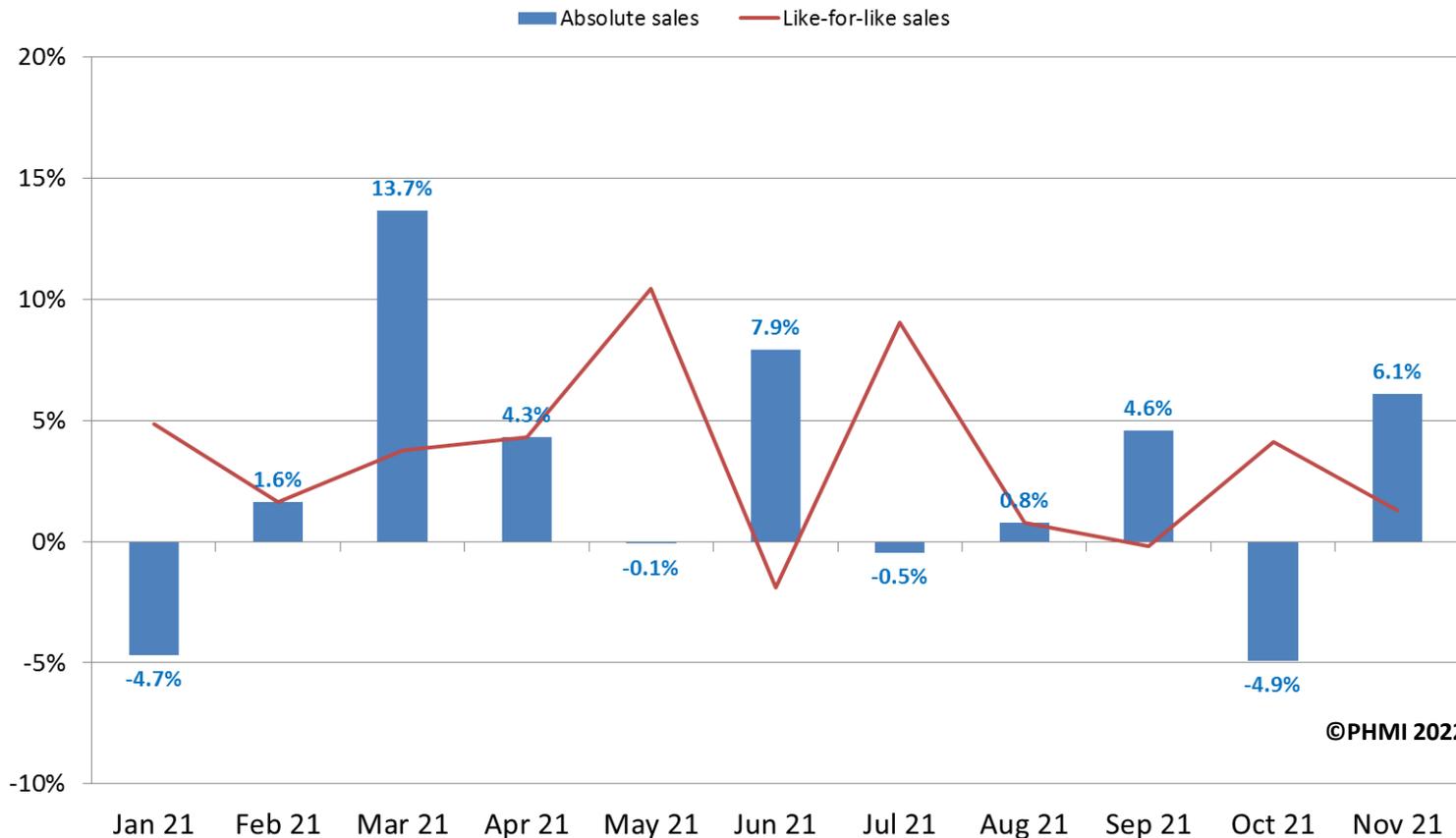
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# 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 absolute sales

©PHMI 2022

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

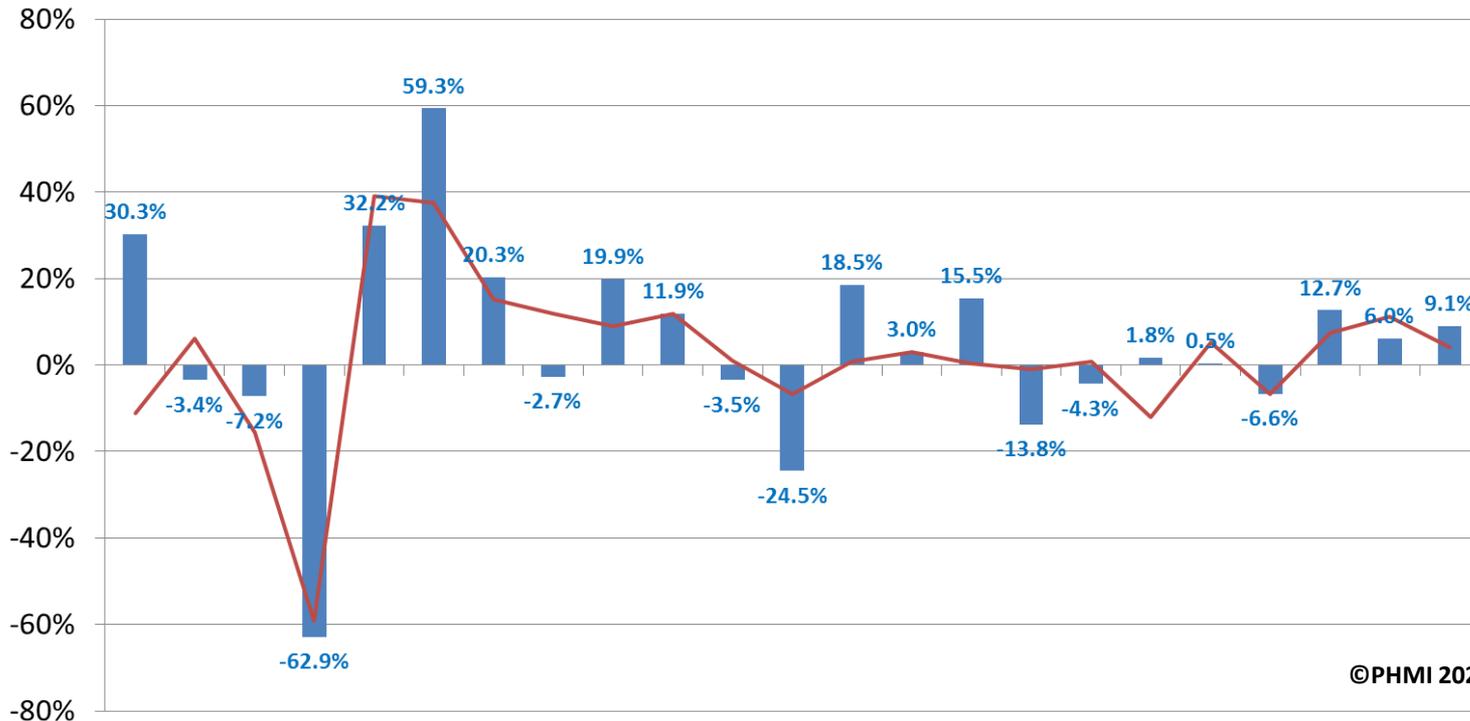
# Monthly: Month v previous month

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 absolute sales

©PHMI 2022

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 Oct 21 Nov 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 Nov 2021

# Rolling 3-months: This year v last year

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

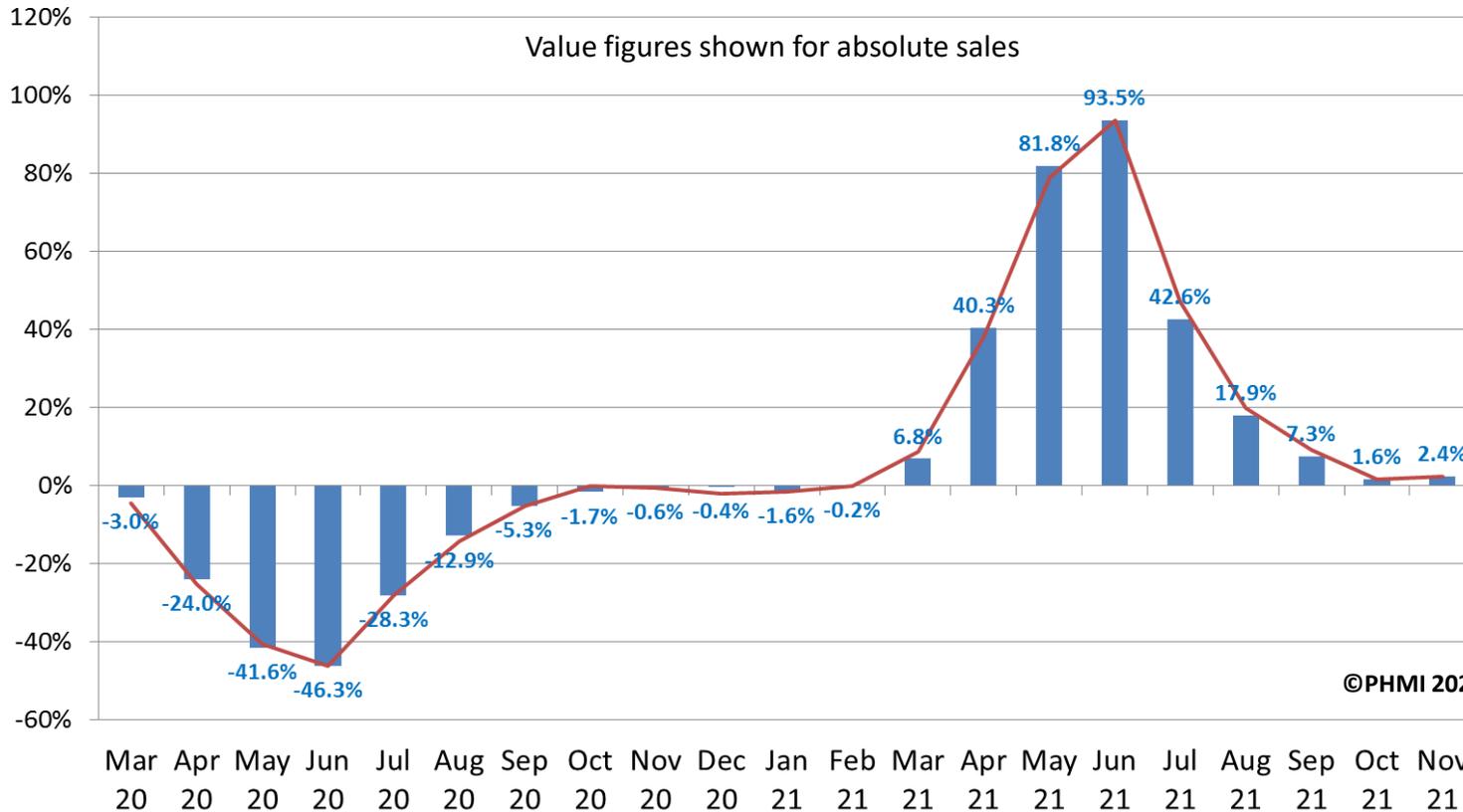


(Like-for-like sales take trading day differences into account)

## Rolling 3 months: year on year

Absolute sales    Like-for-like sales

Value figures shown for absolute sales



©PHMI 2022

Eg. Nov21 shows sales in the three months September to November were 2.4% higher than the same three months last year.

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

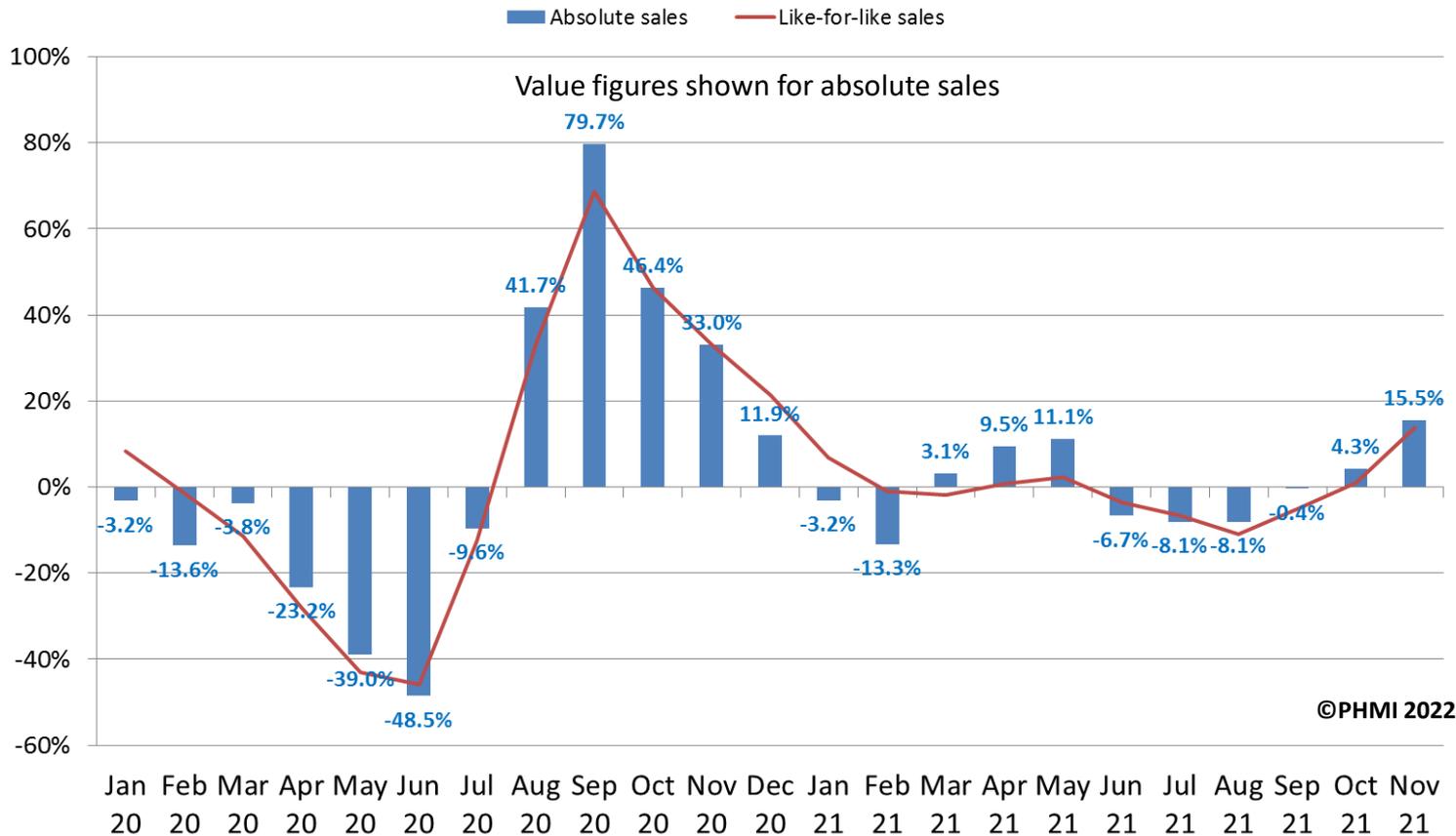
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# 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. Nov 21 shows the three months September to November were 15.5% higher than the three months June to August.

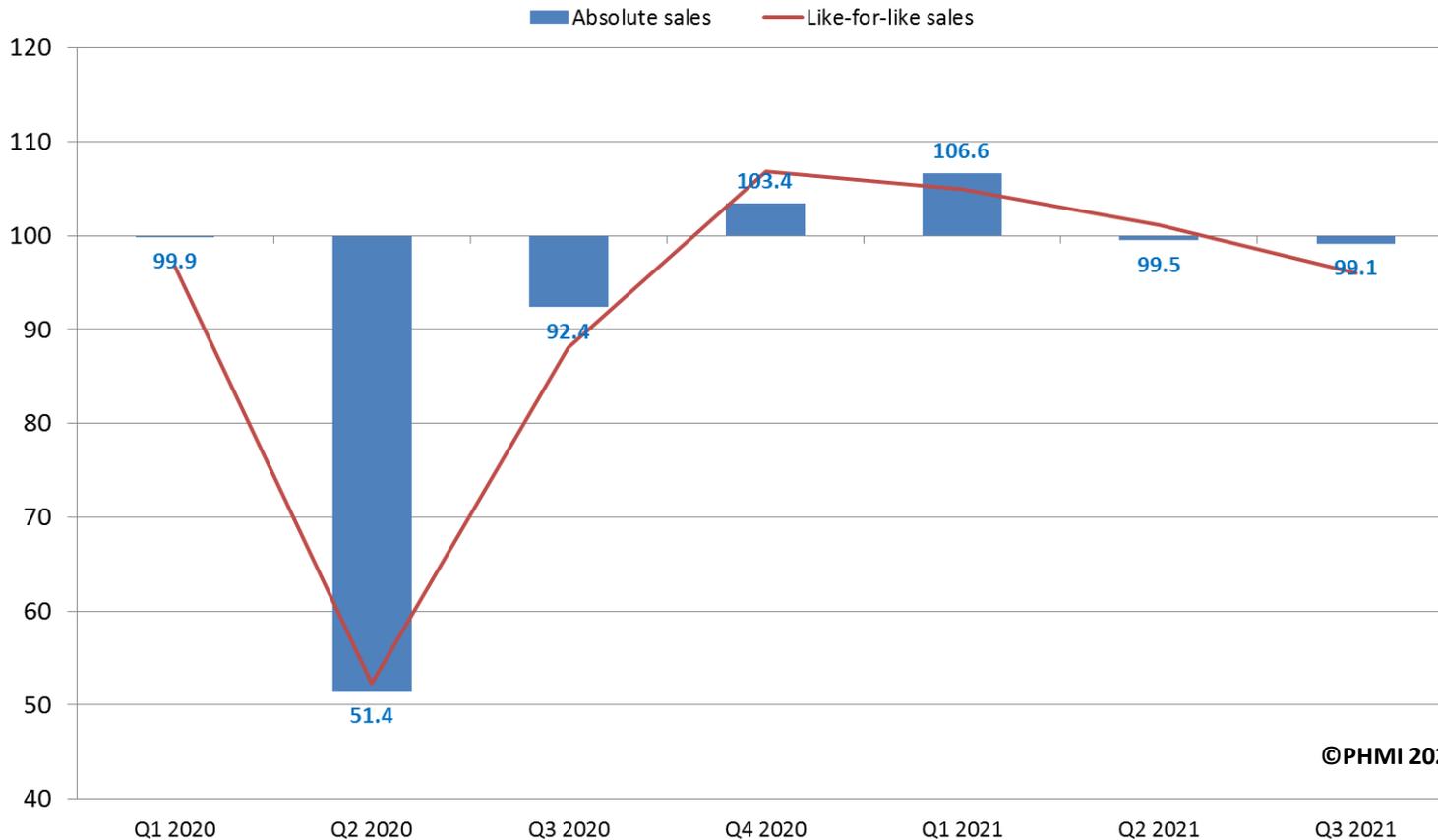
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Nov 2021

# 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



Values shown for  
absolute sales

©PHMI 2022

\*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

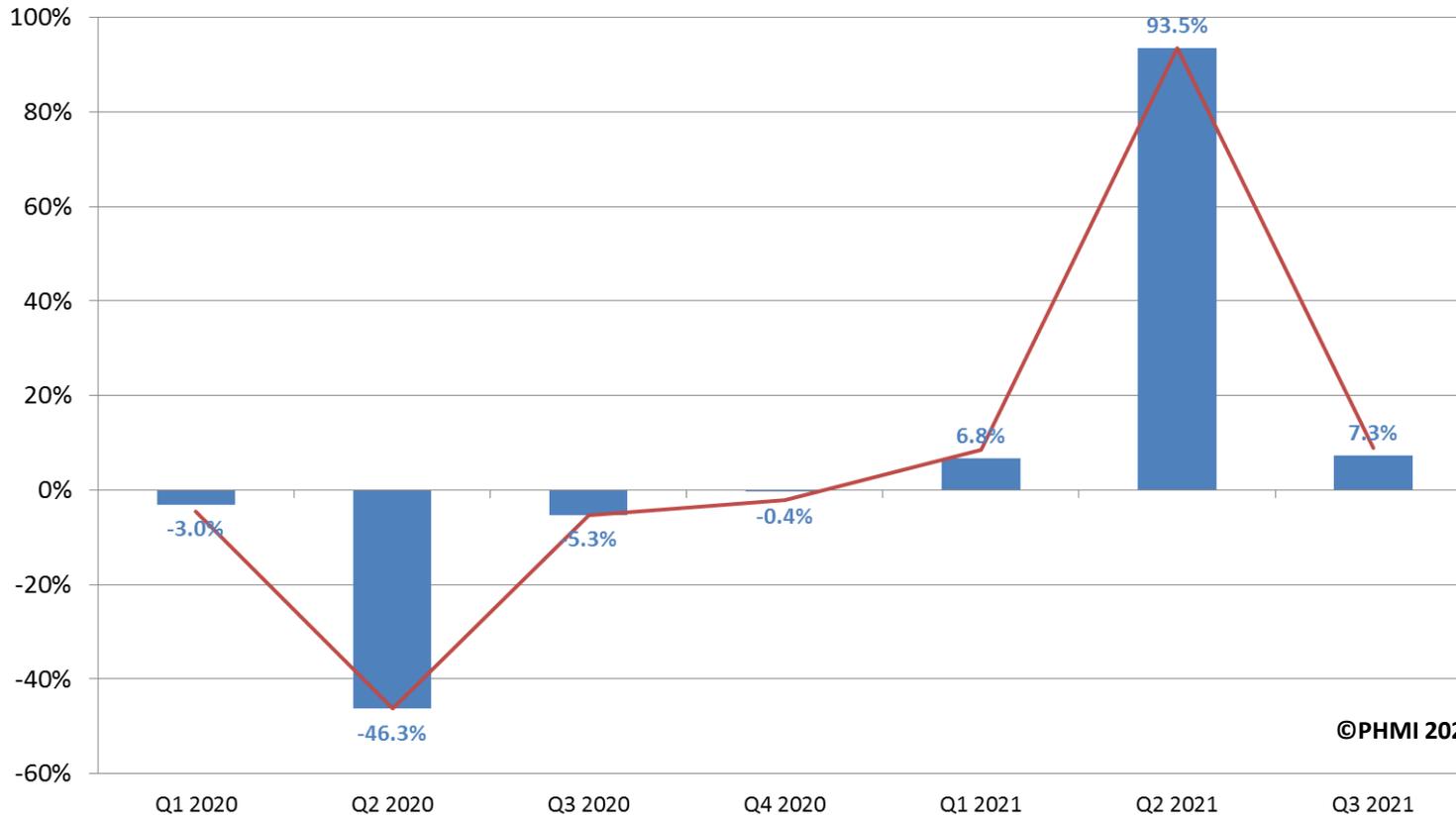
# Quarterly: Year on Year

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

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

## Quarter: year on year

Absolute sales Like-for-like sales



Values shown for  
absolute sales

©PHMI 2022

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

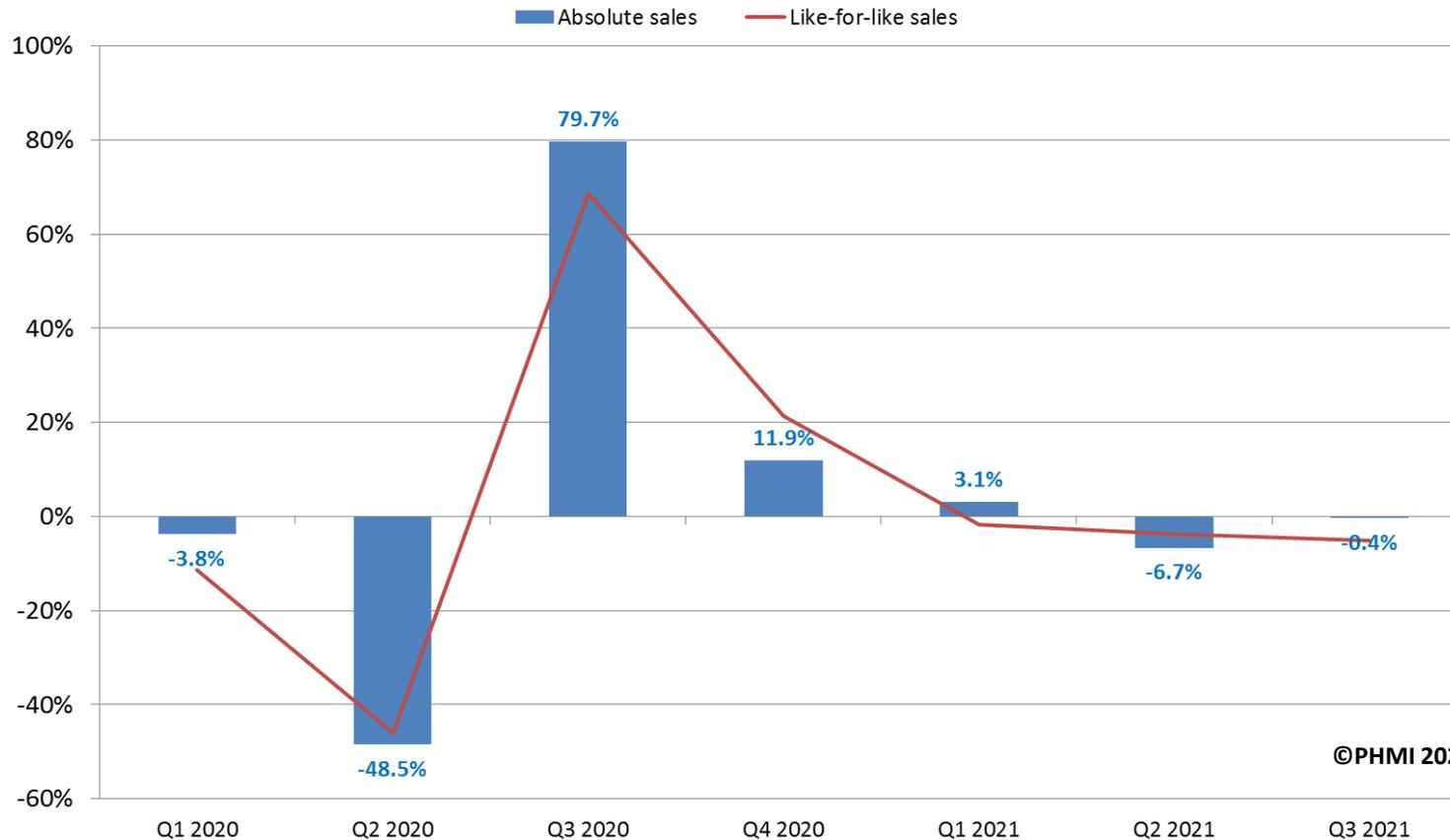
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Quarterly: Quarter v previous quarter

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

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

## Quarter v previous quarter



Values shown for  
absolute sales

©PHMI 2022

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

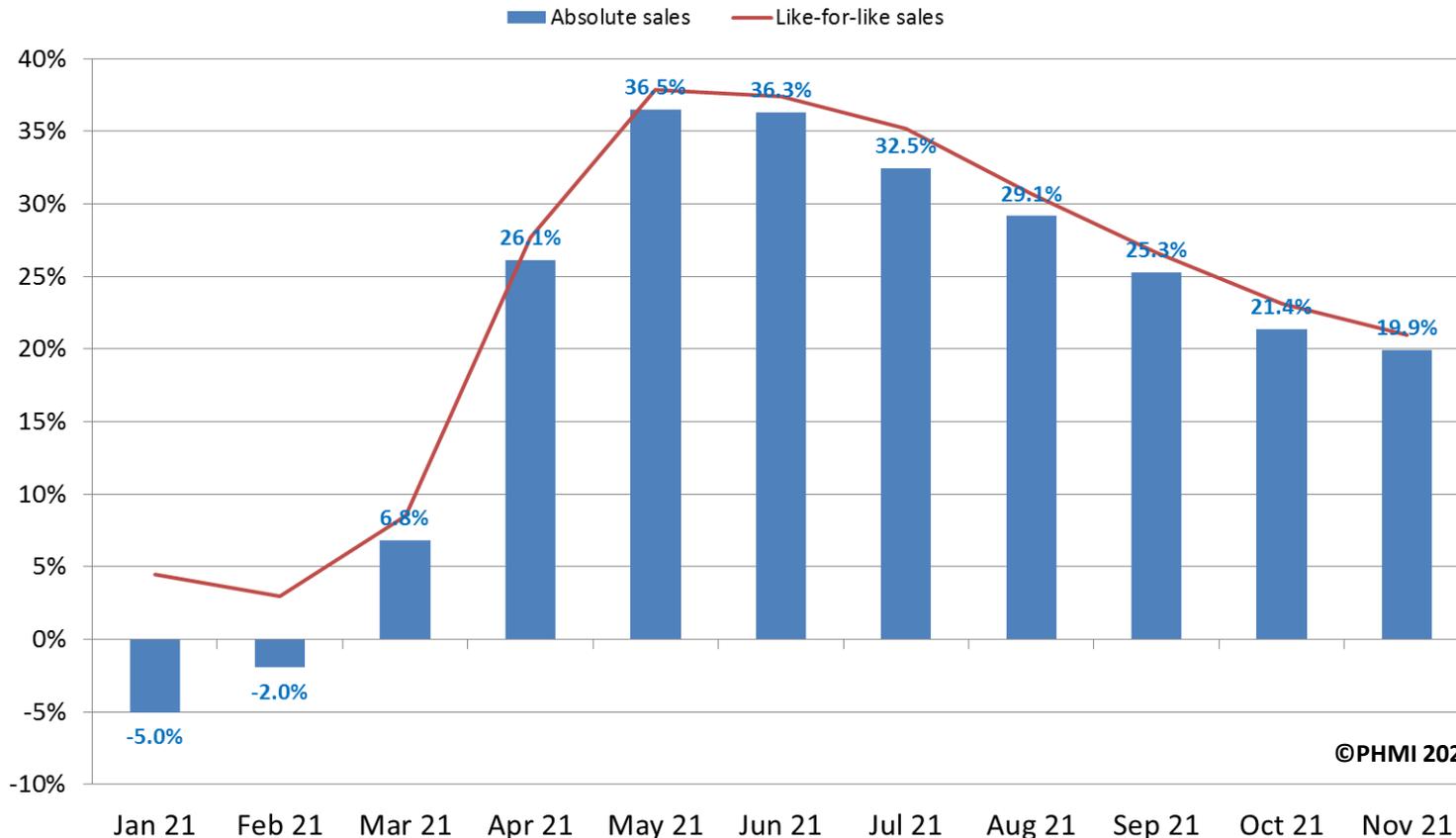
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Year To Date: Year on year

Last 11 months absolute sales index and like-for-like sales index\*

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

## Cumulative year to date: Jan 21 to Nov 21 v last year



Values shown for absolute sales

©PHMI 2022

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

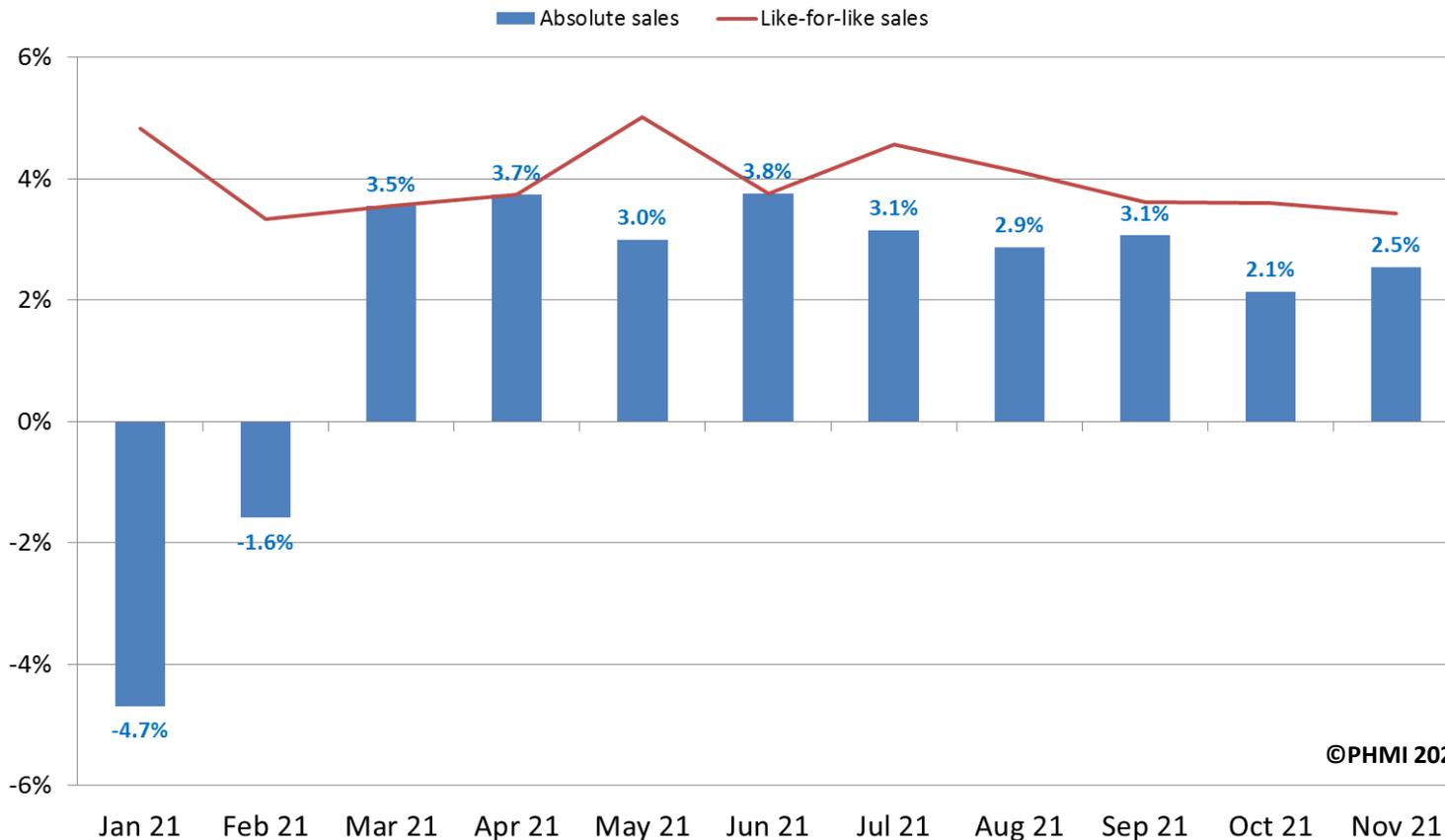
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Year To Date: 2021 v 2019

Last 11 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



Values shown for absolute sales

©PHMI 2022

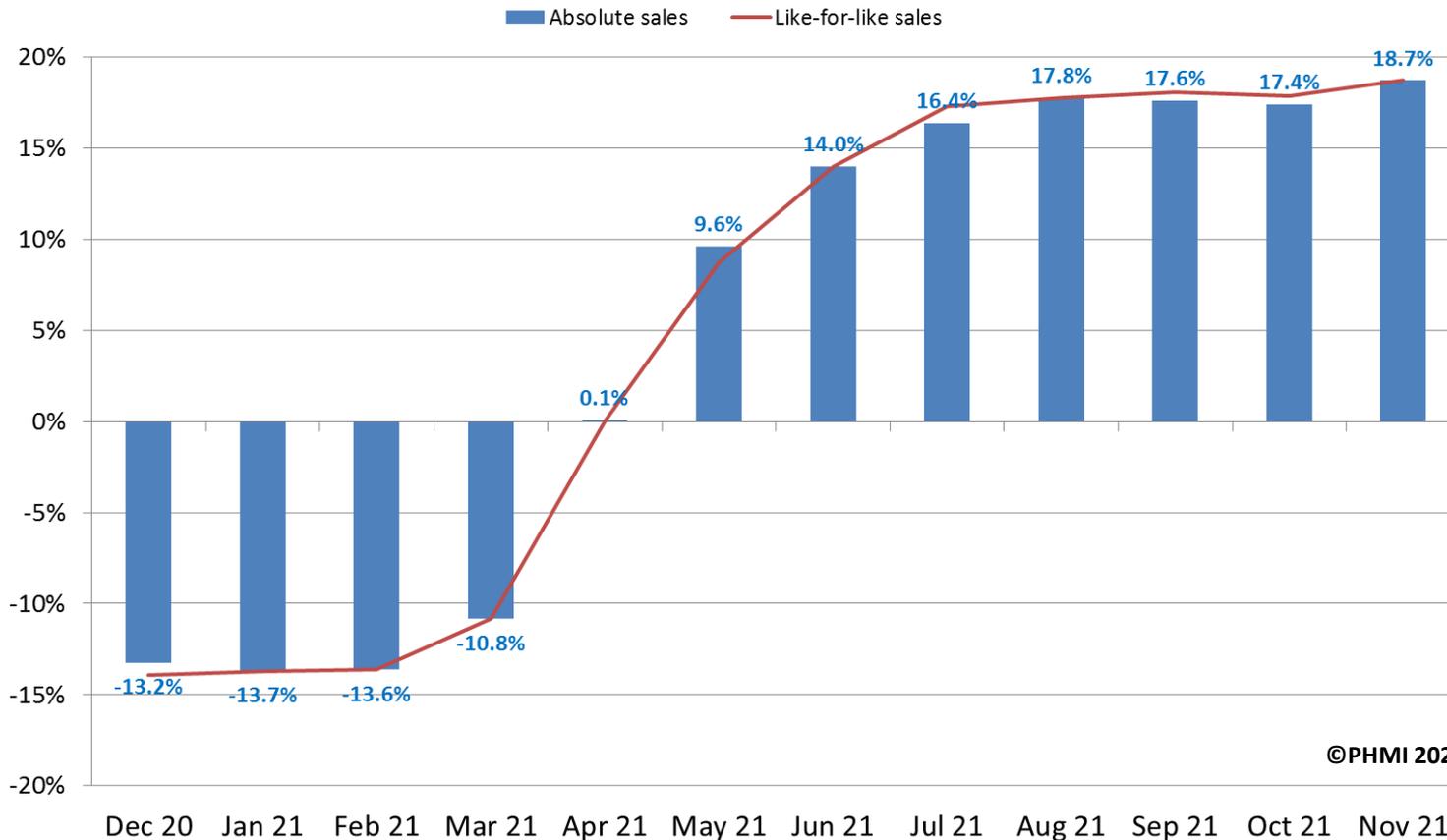
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Nov 2021

# 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



Values shown for absolute sales

©PHMI 2022

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

## Quarterly

Index: 62.3

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

## Half Year

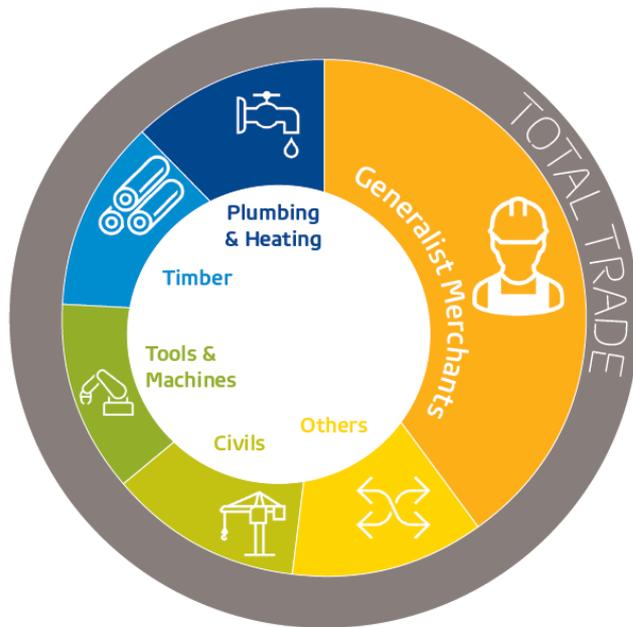
2020	
H1	H2
125	125
2021	
H1	H2
124	

## 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 Ralph Sutcliffe:



**Ralph Sutcliffe**

Business Development  
Director

[ralph@mra-marketing.com](mailto: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](mailto:Emile.van-der-ryst@gfk.com)

+44 (0) 20 7890 9615

“building **excellence**  
in materials supply”



## BMF (Builders Merchant Federation) 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 available now and the Winter forecast due shortly. The latest 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](mailto:sarup.ubhi@bmf.org.uk)

**NEW: Winter edition available shortly**

**Builders Merchants Industry Forecast**  
2021-2022

Year in Review  
Autumn Edition  
£250

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

# Contact us

For further information



**Emile van der Ryst**

Senior Client Insight Manager - Trade

[Emile.van-der-ryst@gfk.com](mailto:Emile.van-der-ryst@gfk.com)

+44 (0) 20 7890 9615



**Sarup Ubhi**

Industry analyst / economist

[sarup.ubhi@bmf.org.uk](mailto:sarup.ubhi@bmf.org.uk)

+44 (0) 24 7685 4994



**Ralph Sutcliffe**

Business Development Director

[ralph@mra-marketing.com](mailto:ralph@mra-marketing.com)

+44 (0) 1453 521621