

“building **excellence**
in materials supply”

Including
**Plumbing & Heating
Merchant Index**
See page 53

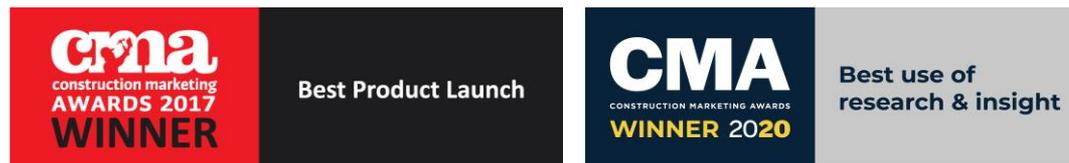
Builders Merchant Building Index



Monthly report for April 2021

(Published 18 June 2021)

Building the Industry & Building Brands from Knowledge



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Introduction



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

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

MRA Research produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: West Fraser (formerly known as Norbord), Pavestone UK Ltd, eCommonSense, British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Hanson Cement, Keystone Lintels, Knauf Insulation, Dulux Trade and Lakes. Meet the Experts [here](#) and on pages 11 and 12 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.

Covid-19 first anniversary

Interpretation and additional analysis



First anniversary of Covid-19

When the Government announced the start of 'Lockdown 1', which took effect from 24 March 2020, it failed to make it clear that construction trades were not required to stop work. As a result, most of the Merchant market shut down – only starting to re-emerge towards the end of April 2020. This resulted in revenue falling sharply, especially in April 2020. Consequently, year-on-year comparisons with that period show significant gains.

Many of the percentage increases are well-outside the norms, making them less easy to visualise. To provide a comparison, the table below illustrates how the percentages relate to multiples of last year's revenue. For example, an increase of +400% means this year's sales were five times the value of last year's sales:

+100%	= 2 times last year
+200%	= 3 times last year
+300%	= 4 times last year
+400%	= 5 times last year
+500%	= 6 times last year
+600%	= 7 times last year
+700%	= 8 times last year
+800%	= 9 times last year
+900%	= 10 times last year
+1000%	= 11 times last year

Taken on face value this year's gains are considerable but, with last year being so weak, it is difficult to assess just how good this year's figures really are.

Additional charts tracking performance over two years.

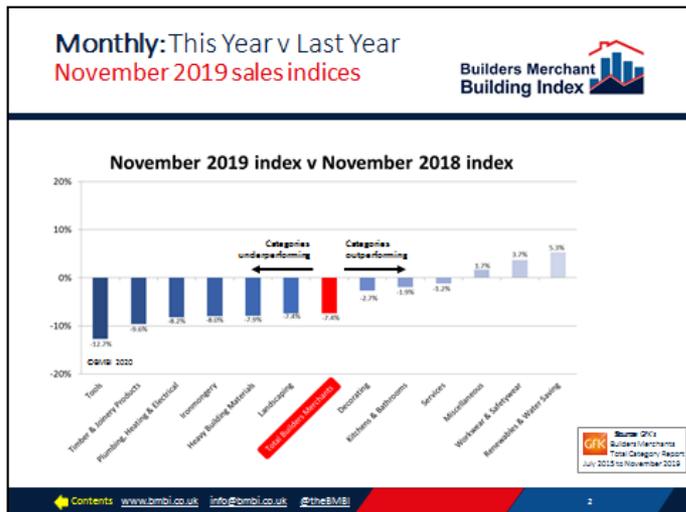
By also looking back over two years, it is possible to see how well the market is performing – by benchmarking 2021 against more normal trading conditions. This BMBI report includes additional comparisons between 2021 and 2019, making it possible to assess how well the industry has recovered. Future reports will continue to look back over two years until we are beyond last year's economic turmoil.

Trading day differences explained

BMBI Reports track changes in Merchants' performance over a variety of time periods. However, the number of trading days in a period can change how we judge relative performance. More trading days in a month could boost total sales, whereas the level of sales a day could be lower.

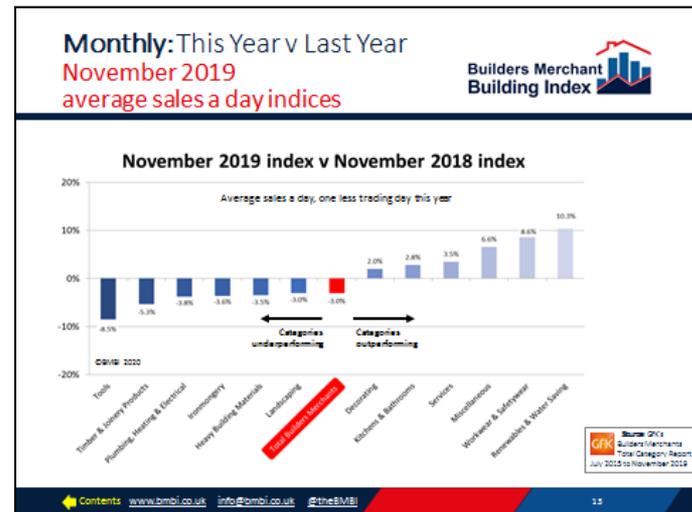
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

Direct comparison of sales indices:



The first of the two charts directly compares revenue in the two periods, regardless of the number of trading days. In the example above from November 2019, Total Builders Merchants sales (the red column) were 7.4% lower.

Average sales a day indices comparison:



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

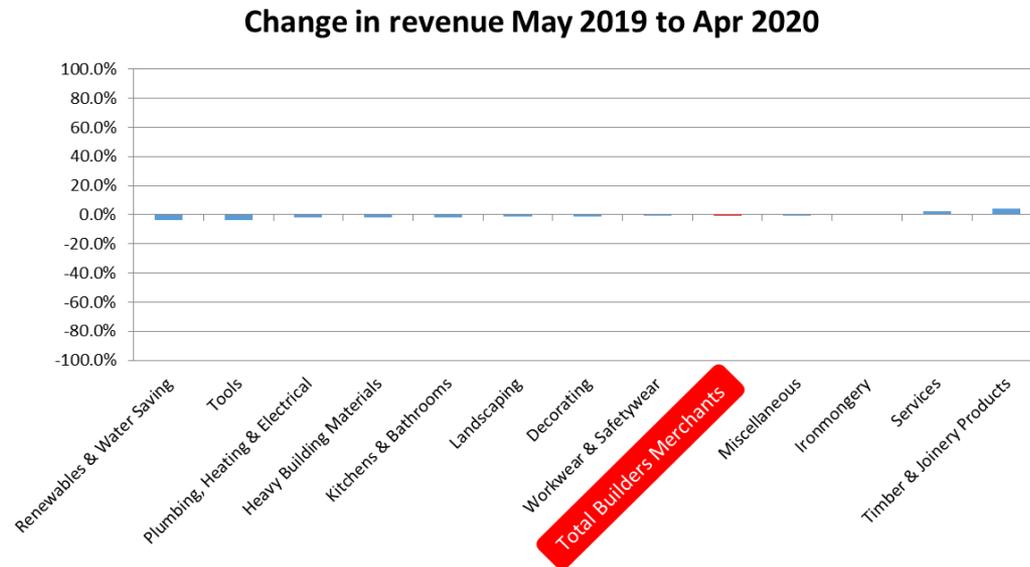
The charts provide two valid views of the same data. Direct comparison (on the left) show what happened in absolute numbers – average sales a day (on the right) enables trading day differences to be set aside.

GfK's Builders Merchant Panel update



After almost six years without change, GfK's Builders Merchant Panel, which powers the Builders Merchant Building Index, saw three merchants leave and three join in Spring 2020. A lengthy transition period took place in the background and as a result, data covering January 2019 onwards now reflects the new panel. This has ensured the robust nature of the Builders Merchant Building Index has been maintained.

The overall impact of the changes was very small, with total revenue for the 12 months May 2019 to April 2020 being just -0.3% different to that previously published. Individual categories had mostly small changes, some a little up and some a little down, depending on the mix of sales contributed by the joining and leaving merchants. Small category Renewables & Water Saving was more significant, and only Timber & Joinery Products and Tools among the main categories were appreciably different, as illustrated in this chart.



The tables and charts in this report use the refreshed data from January 2019 onwards. For example, the values for April 2020 in the Indices table on page 13 are marginally different to those in reports published prior to May 2020. The chart on page 14 incorporates the new values from January 2019 onwards but the differences are relatively small.

Incorporating the new data back to January 2019 has also meant that year-on-year, month-on-month and year-to-date comparisons are all calculated using the refreshed data throughout, to ensure accurate reporting – a hallmark of the Builders Merchant Building Index.

If you have questions on the changes email Tom@mra-marketing.com or Emile.van-der-Ryst@gfk.com

Spectacular year-on-year growth on first anniversary of Covid-19 Lockdown 1

This time last year the country was at a standstill. Most merchants closed branches, resulting in April 2020 total sales falling by 76.3% compared with April 2019. Twelve months later sales have bounced back strongly. This report includes some spectacular growth figures that can be initially hard to visualise. See page 6 for a table that puts the percentages into context.

The report also includes comparisons with 2019 that show how strongly the market performed.

Year-on-Year

Total Builders Merchants April 2021 value sales were a dizzying 419.2% higher compared with April 2020. In other words, sales this year were 5.19 times last year's value. April sales were also the second-highest since BMBI data was first collected in July 2014, being narrowly beaten by March 2021. Tools (+1188.1%) did best, selling almost 12.9 times what was sold last April – when it was the worst-performing category. Kitchens & Bathrooms (+706.3%) was the second-strongest this year, having been the second-weakest last April. Other categories exceeding 500% increases were Timber & Joinery Products (+555.8%) and Landscaping (+538.4%) – both of which had their highest-ever BMBI monthly sales. Six categories grew more slowly than merchants generally, including Plumbing Heating & Electrical (+369.9%) and Heavy Building Materials (+350.6%). Despite selling nearly three times as much this year as last year, Workwear & Safetywear (+175.8%) was weakest – having been the strongest category in April 2020.

April 21 v April 19

Total sales in April 2021 were 22.1% higher than in April 2019 and eleven of the twelve categories sold more. Landscaping (+63.3%) led the field, with Timber & Joinery Products (37.2%) the only other category to out-perform merchants overall. Heavy Building Materials (+13.8%) grew more slowly, as did Plumbing Heating & Electrical (+2.3%). Kitchens & Bathrooms (-1.3%) was the only category that sold less in April this year than in April 2019.

Month-on-Month

Compared with a record-breaking March, Total Merchants sales in April were 0.9% lower, not helped by April having three fewer trading days. Only two categories sold more this month, with Landscaping (+15.5%) doing best, followed by Timber & Joinery Products (+0.4%). The three weakest categories were Tools (-8.3%), Workwear & Safetywear (-12.0%) and Plumbing Heating & Electrical (-13.1%) Average sales a day in April were 14.0% higher than March, with all categories selling more.

Overview continues on the next page...

Total Builders Merchants April 2021 value sales were a dizzying 419.2% higher compared with April 2020. In other words, sales this year were 5.19 times last year's value. Tools (+1188.1%) did best, selling almost 12.9 times what was sold last April.

...Overview continued from the previous page:

Last three months, year on year

Total sales in February to April 2021 were 72.4% higher than the same three months in 2020, with one more trading day this year. All categories sold more this year. Landscaping (+133.1%) was strongest, followed by Timber & Joinery Products (+99.6%) and Tools (+86.2%). The remaining 9 categories all grew more slowly, including Heavy Building Materials (+61.1%), Decorating (+50.6%) and Kitchens & Bathrooms (+46.4%). Workwear & Safetywear (+9.5%) had the smallest increase. Average sales a day across all merchants were 69.6% higher.

Last 3 months v 2019

Across all merchants, sales in February to April 2021 were 15.6% higher than the same period in 2019, helped by two more trading days. Once again, Landscaping (+51.5%) did best. Timber & Joinery Products (+28.1%) was the only other category that out-performed merchants overall. Categories growing more slowly included Heavy Building Materials (+8.9%), Ironmongery (+6.9%) and Plumbing Heating & Electrical (+1.1%). Kitchens & Bathrooms (-2.8%) was the only sector that sold less. Total Merchants average sales a day were 11.9% higher this year than in February to April 2019.

Year to date

In the four months January to April 2021, Total Merchants sales were 49.2% higher than in the same period last year, with one less trading day in 2021. All categories sold more this year, led by Landscaping (+100.1%) and Timber & Joinery Products (+70.5%). Workwear & Safetywear (+7.5%) had the smallest growth. Average sales a day were 51.0% higher overall.

MAT

In the 12 months May 20 to April 21, Total Merchants sold 10.9% more than in the same period a year earlier. This is the first time the MAT has shown a year-on-year increase since December 2019 and it represents BMBI's best-ever MAT performance. April saw the largest-ever month-on-month change in MAT, having been -5.5% in March – hence a +16.4 percentage-point swing. The second-highest positive swing was +4.9 percentage points between Feb and March 2021. The largest negative swing was -7.0 percentage points between March and April 2020

Index

April's BMBI index was 150.6, the second-highest ever recorded and only marginally behind March's record-breaking 151.9. Landscaping (257.0) was strongest, followed by Timber & Joinery Products (176.3). Workwear & Safetywear (104.0) was weakest of the main categories and only Renewables (78.8) was below 100.

Total sales in February to April 2021 were 72.4% higher than the same three months in 2020, with one more trading day this year. Landscaping (+133.1%) was strongest.

The Expert Panel

Speaking for their markets - 1



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

The Q1 2021 report, which includes commentary from our experts is available [here](#)

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

Expert for Drylining Systems:



Stacey Temprell,
Marketing Director
British Gypsum

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

Expert for Bricks & Roof Tiles:



Kevin Tolson,
Commercial Director
Wienerberger UK

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

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

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

Expert for Civils & Green Infrastructure:



Steve Durdant-Hollamby,
Managing Director
Polypipe Civils

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

Expert for Lead:



Lynn Street
Sales & Marketing Manager
Midland Lead

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

Expert for Wood-Based Panels:



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

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

The Expert Panel

Speaking for their markets - 2

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

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

Expert for PVC-U Windows & Doors:



Kevin Morgan
Group Commercial Director
The Crystal Group

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

Expert for Shower Enclosures and Showering:



Mick Evans
Operations Director
Lakes

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

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

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

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Hanson Cement

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

Expert for Paint:



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

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

Expert for Website & Product Data Management Solutions:



Andy Scothern
Managing Director
eCommonSense

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

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

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

Monthly: Index and Categories

April 2020* – April 2021

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



		2020									2021			
MONTHLY SALES VALUE INDEX	Index	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Total Builders Merchants	100	29.0	78.7	121.4	131.9	113.3	128.7	126.4	123.5	83.5	100.7	109.4	151.9	150.6
Timber & Joinery Products	100	26.9	80.5	126.7	140.3	120.6	139.3	141.1	139.9	95.2	120.0	128.8	175.7	176.3
Heavy Building Materials	100	30.5	78.5	116.4	125.6	108.6	125.4	122.8	119.4	78.1	95.9	102.0	141.3	137.4
Decorating	100	19.8	54.8	94.4	112.4	100.1	113.1	111.7	110.5	76.2	85.8	95.7	121.7	113.2
Tools	100	8.6	35.1	79.3	99.0	85.8	98.5	101.0	100.0	70.9	84.4	93.7	120.8	110.7
Workwear & Safetywear	100	37.7	66.6	98.2	131.7	98.4	111.1	125.2	126.7	87.9	122.3	111.3	118.2	104.0
Ironmongery	100	27.3	58.9	108.8	128.7	113.6	127.3	127.3	122.9	87.8	103.1	111.5	143.1	137.4
Landscaping	100	40.3	152.5	223.7	208.2	157.2	161.0	135.6	122.8	78.0	90.1	111.9	222.5	257.0
Plumbing, Heating & Electrical	100	25.4	51.8	84.4	103.1	95.3	115.4	126.0	125.9	96.1	111.3	120.3	137.1	119.2
Renewables & Water Saving	100	12.7	26.7	55.1	69.3	58.2	71.9	67.2	70.3	50.4	62.6	62.3	85.9	78.8
Kitchens & Bathrooms	100	14.1	43.7	87.3	111.1	106.3	117.3	119.3	122.7	87.4	94.4	107.4	120.7	113.5
Miscellaneous	100	36.7	55.1	98.0	112.4	98.2	122.3	120.8	118.9	86.1	109.4	107.1	131.2	126.2
Services	100	42.3	70.2	105.9	119.4	109.2	119.2	117.5	115.4	89.0	93.5	103.3	134.5	128.8

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

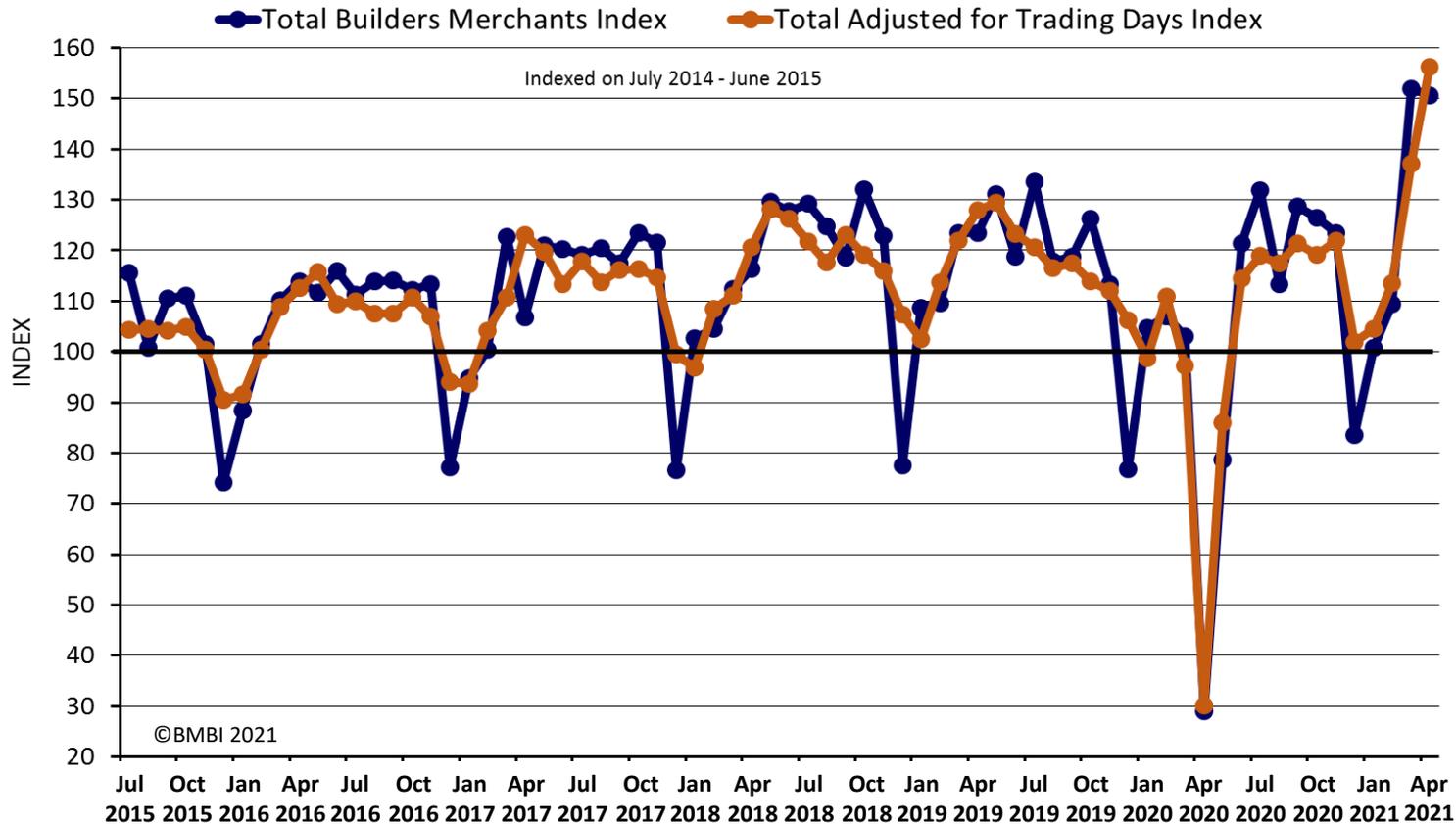
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: Index

Adjusted and unadjusted for trading days



Total Builders Merchants Index v Total Adjusted for Trading Days Index

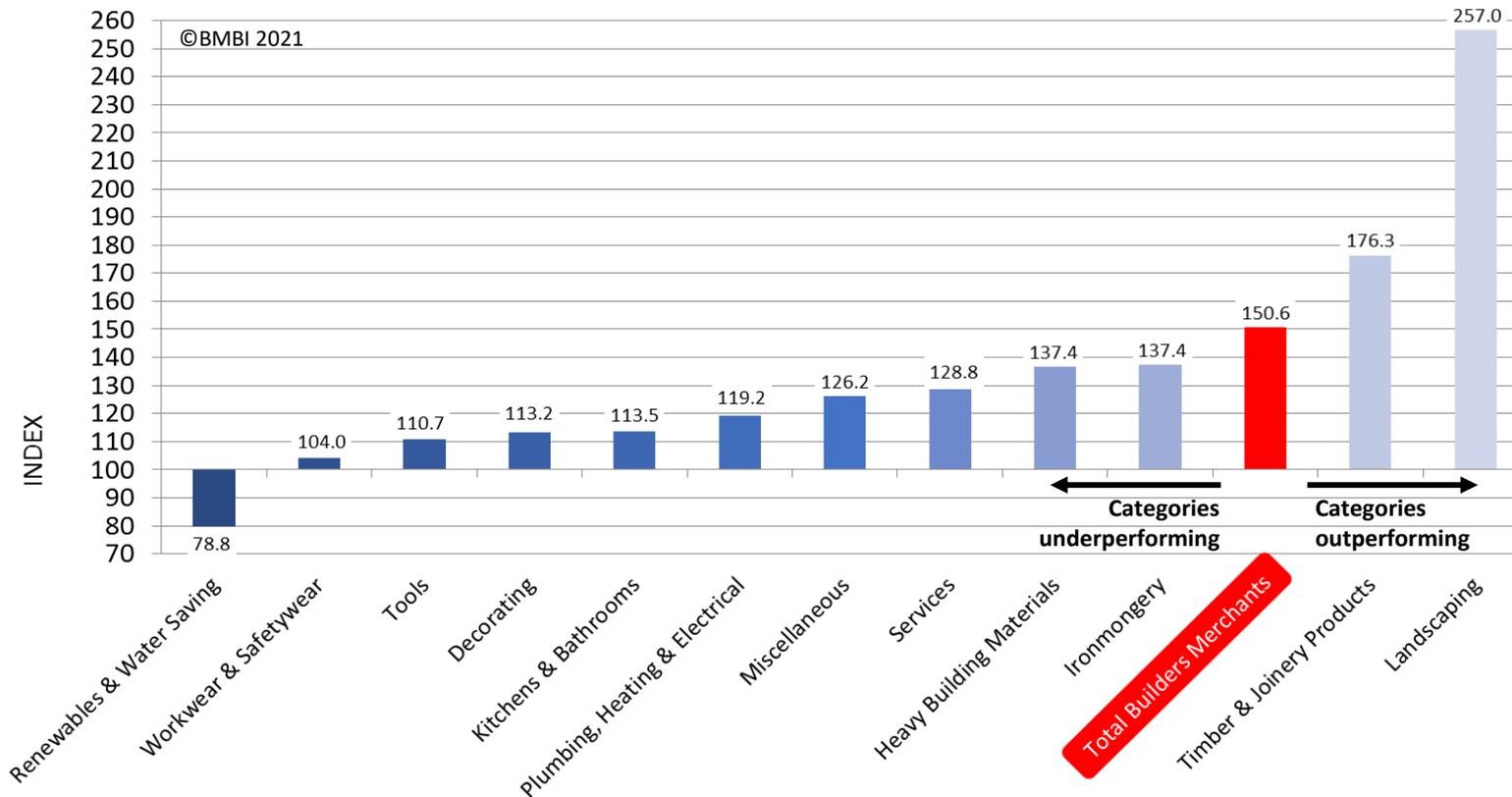


Source: GfK's Builders Merchants Total Category Report July 2015 to April 2021

Monthly: Index and Categories

April 2021 index

April 2021 Index



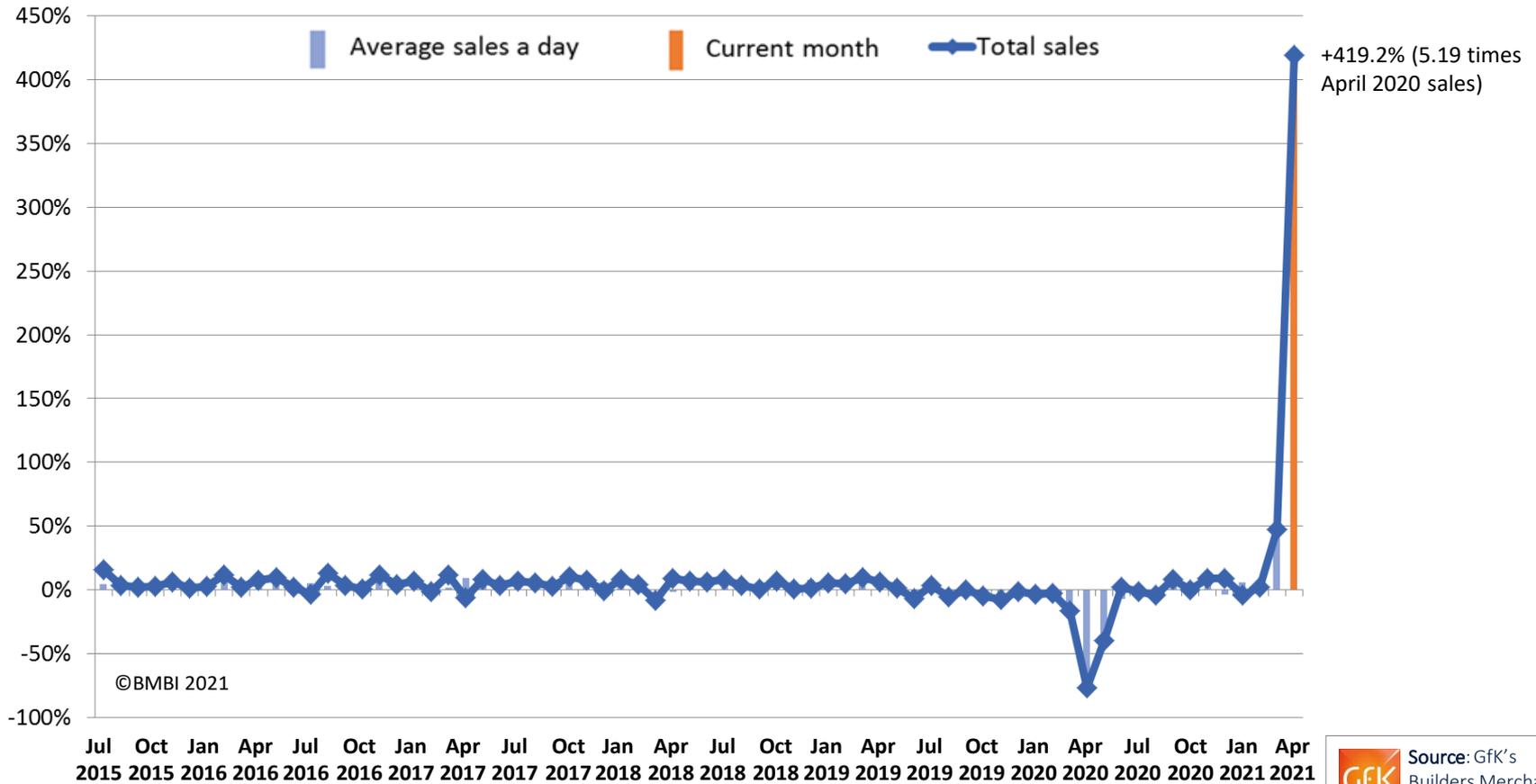
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



Monthly: Year on Year



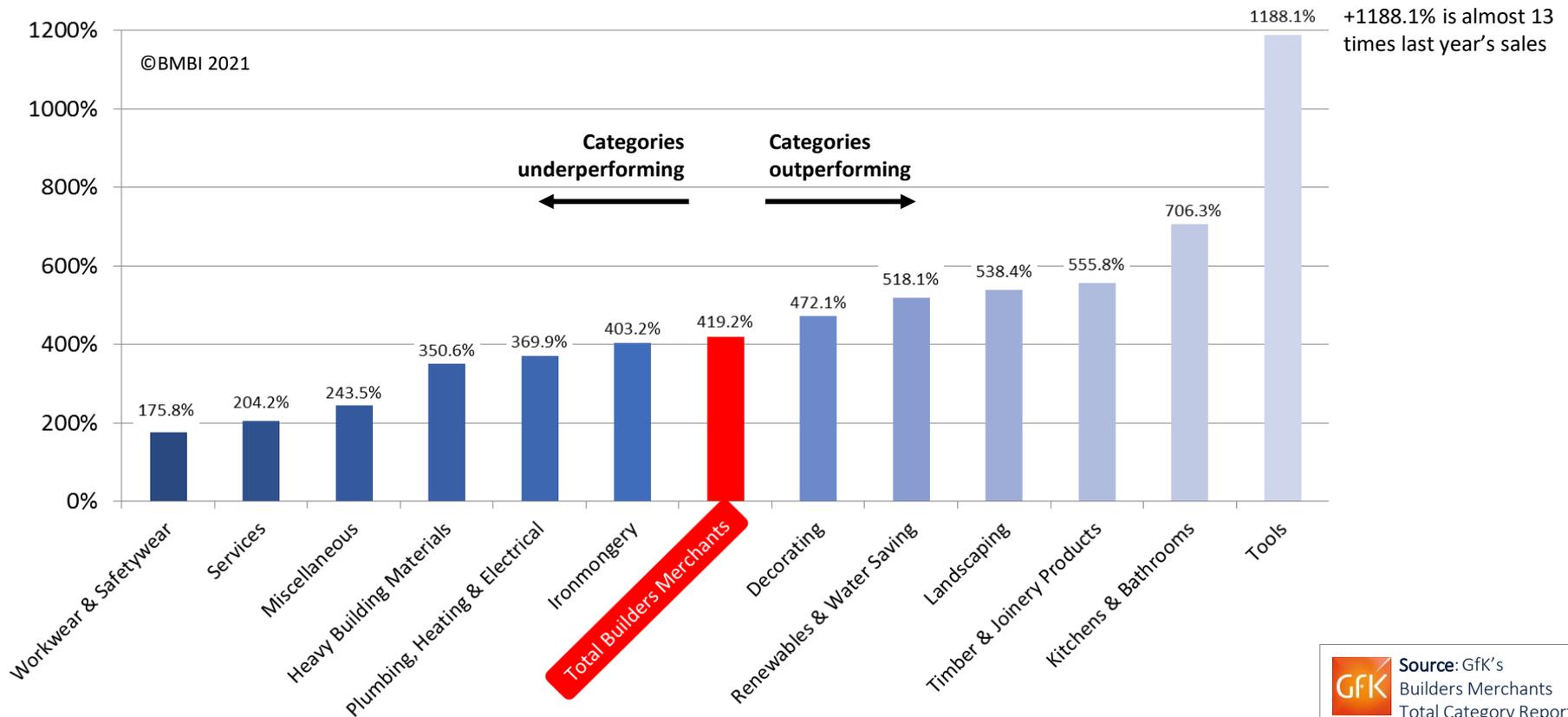
Source: GfK's Builders Merchants Total Category Report July 2015 to April 2021

Monthly: This Year v Last Year

April 2021 sales indices



April 2021 index v April 2020 index

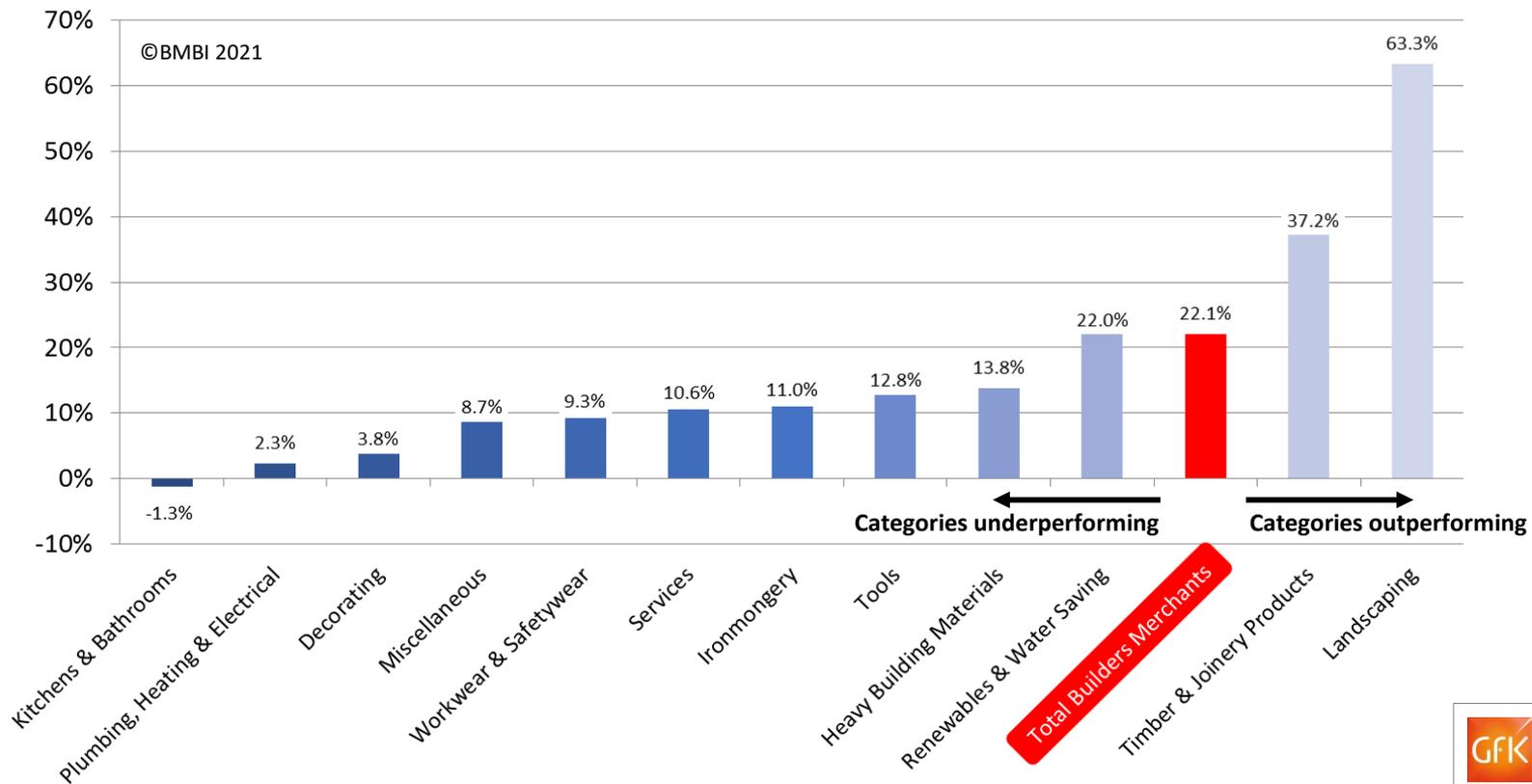


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: This year v 2019

April 2021 2-year sales indices

2-year comparison: April 2021 v April 2019

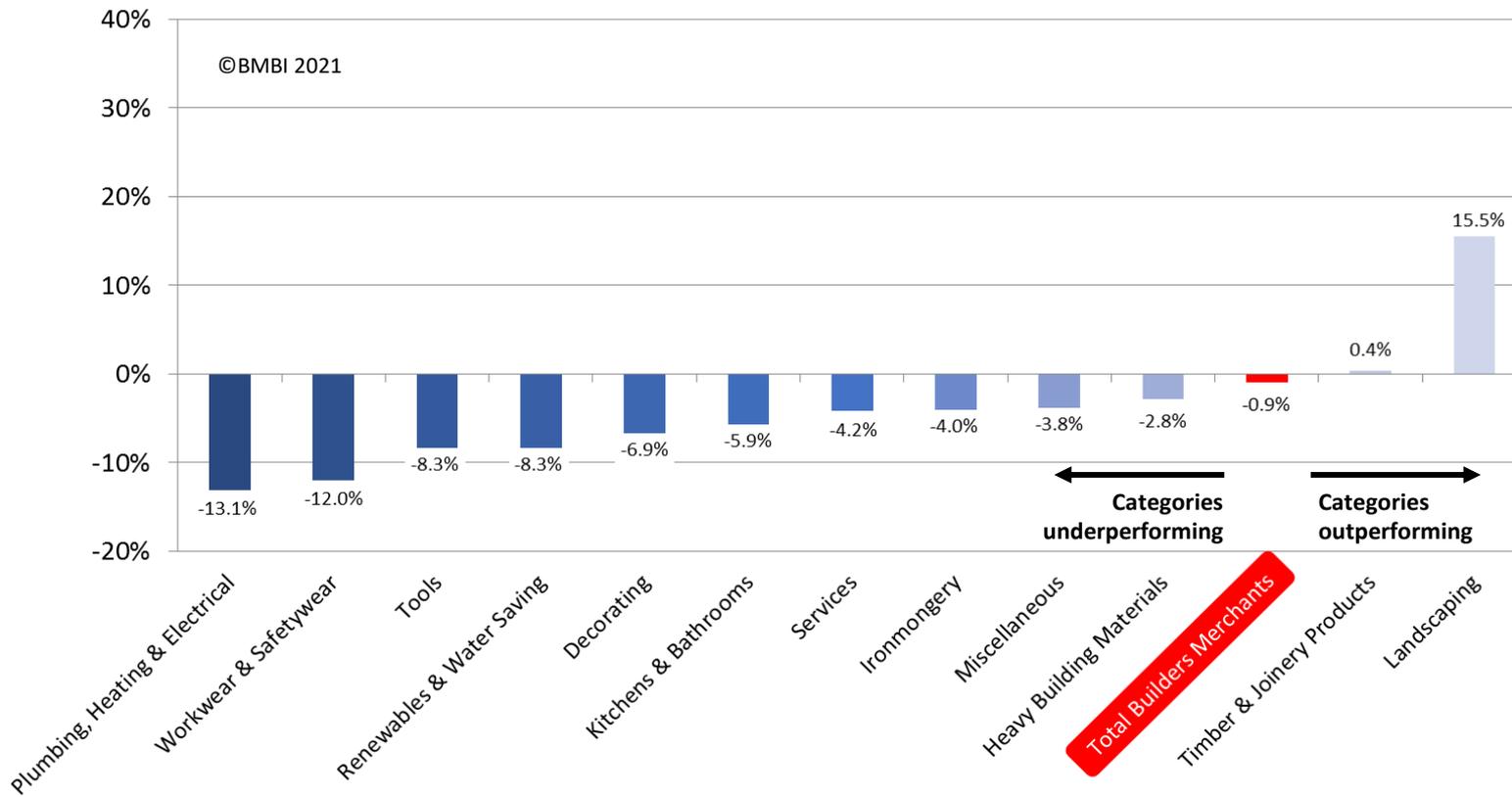


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: This Month v Last Month

April 2021 sales indices

April 2021 Index v March 2021 Index



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

Monthly: This Month v Last Month

April 2021 average sales a day indices



April 2021 Index v March 2021 Index



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

Quarterly: Index and Categories

Quarter 1 2020* to Quarter 1 2021

(Indexed on July 2014 to June 2015)



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

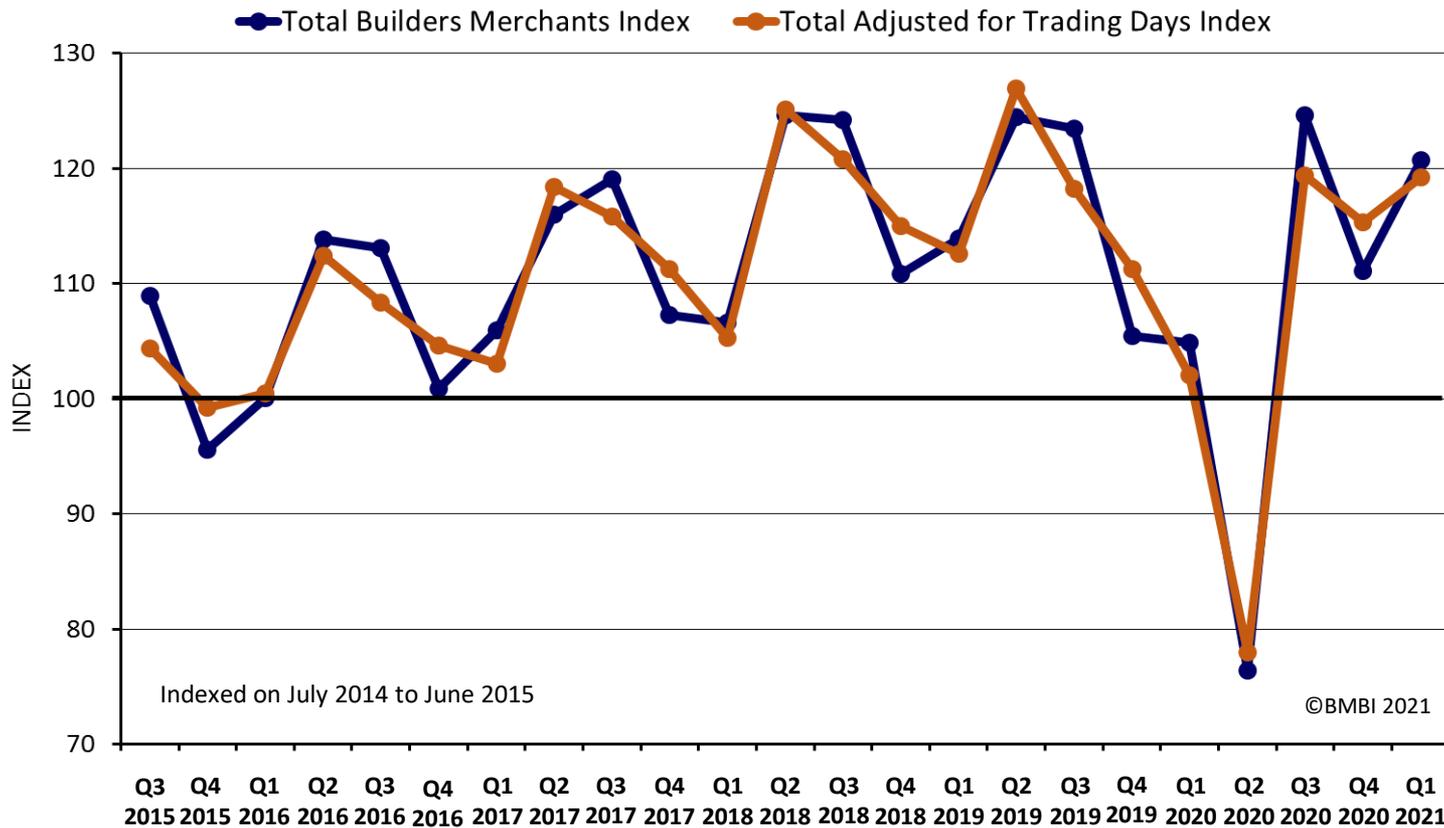
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

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

Quarterly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



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

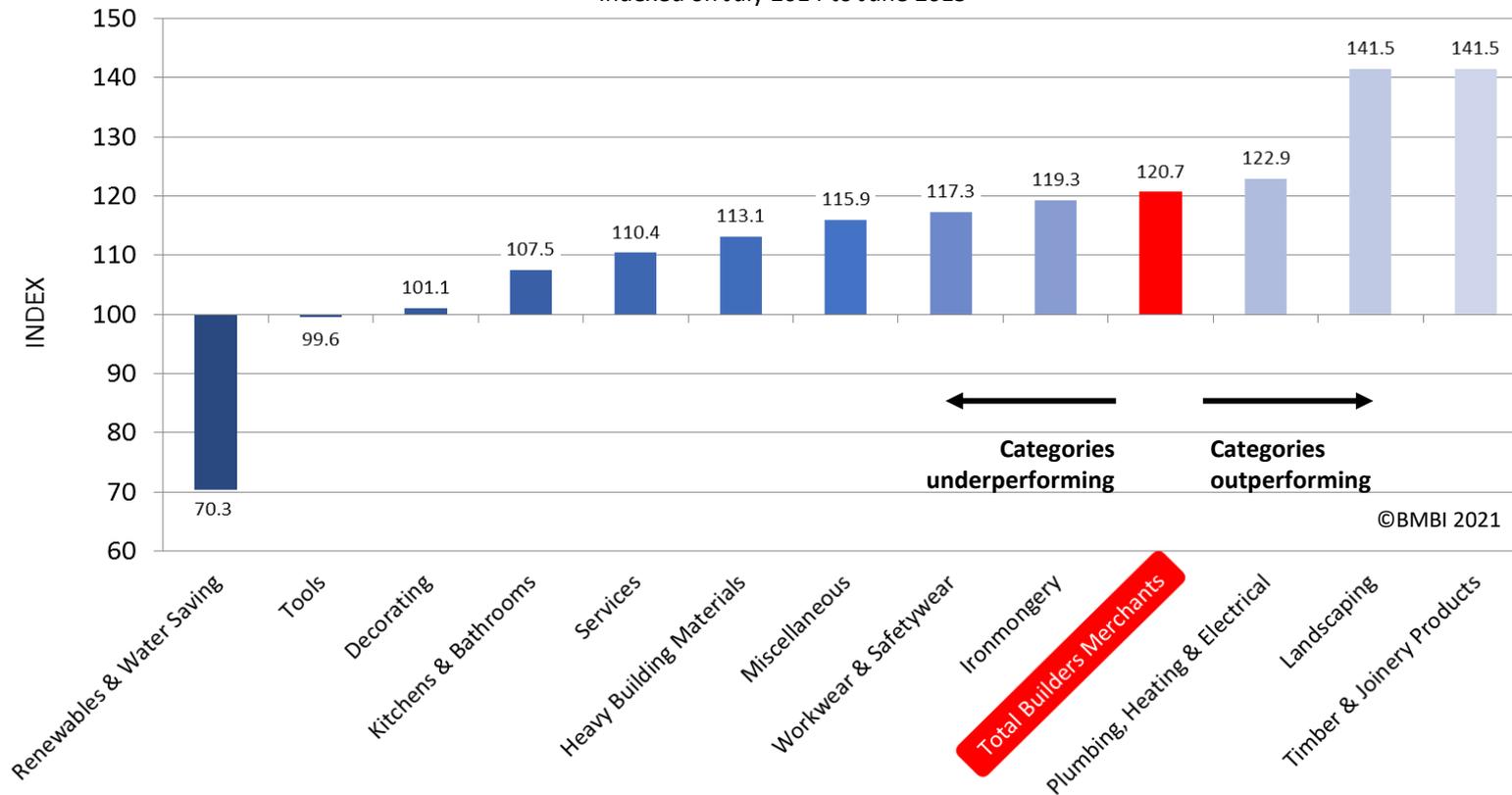
Quarterly: Index and Categories

Q1 2021 index



Quarter 1 2021

Indexed on July 2014 to June 2015



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

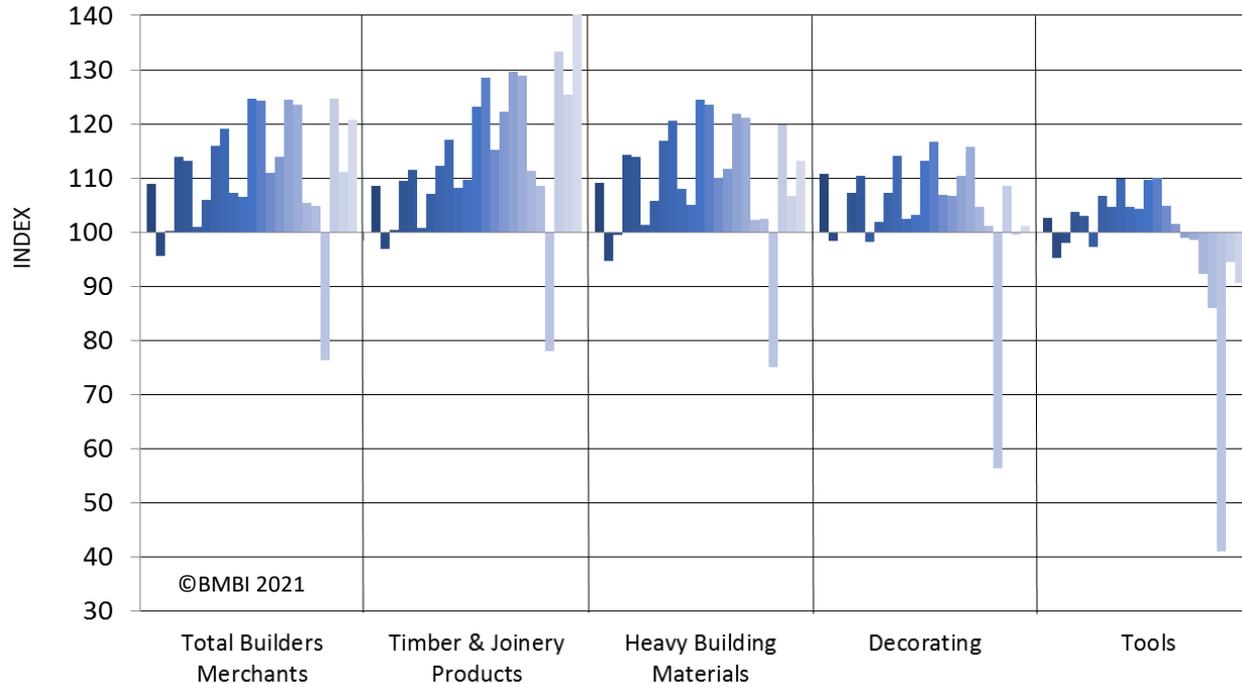
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2021

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020
- Q1 2021



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

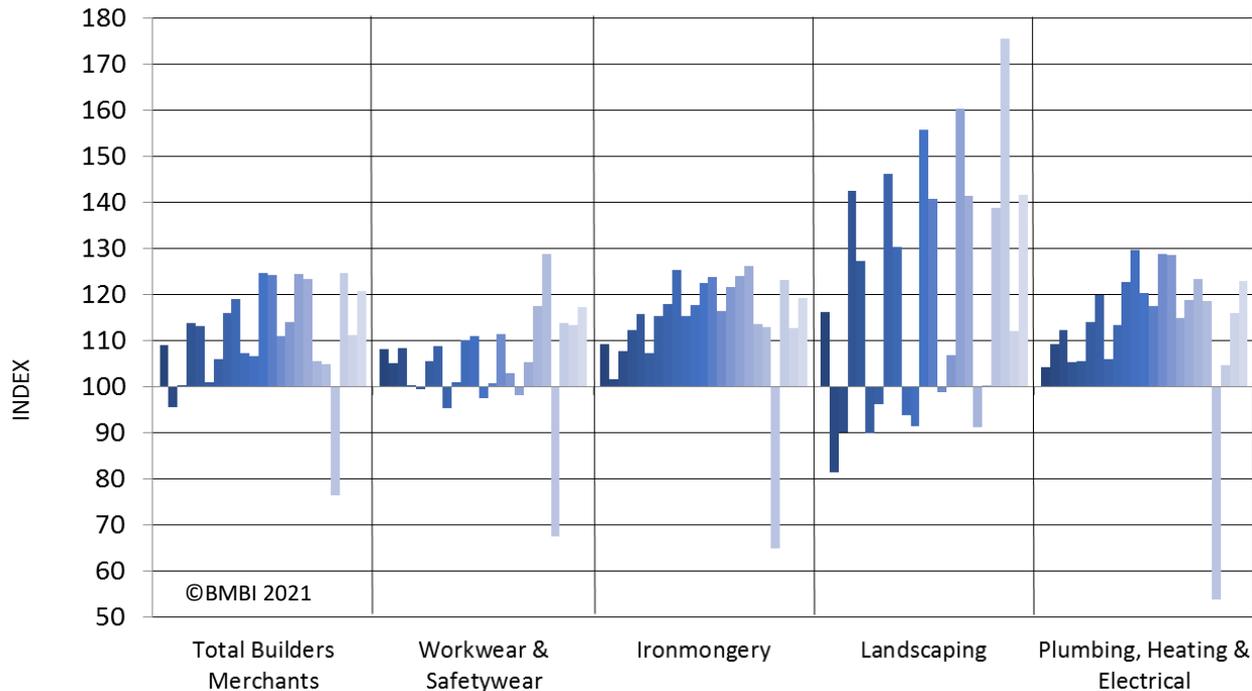
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2021

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020
- Q1 2021



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

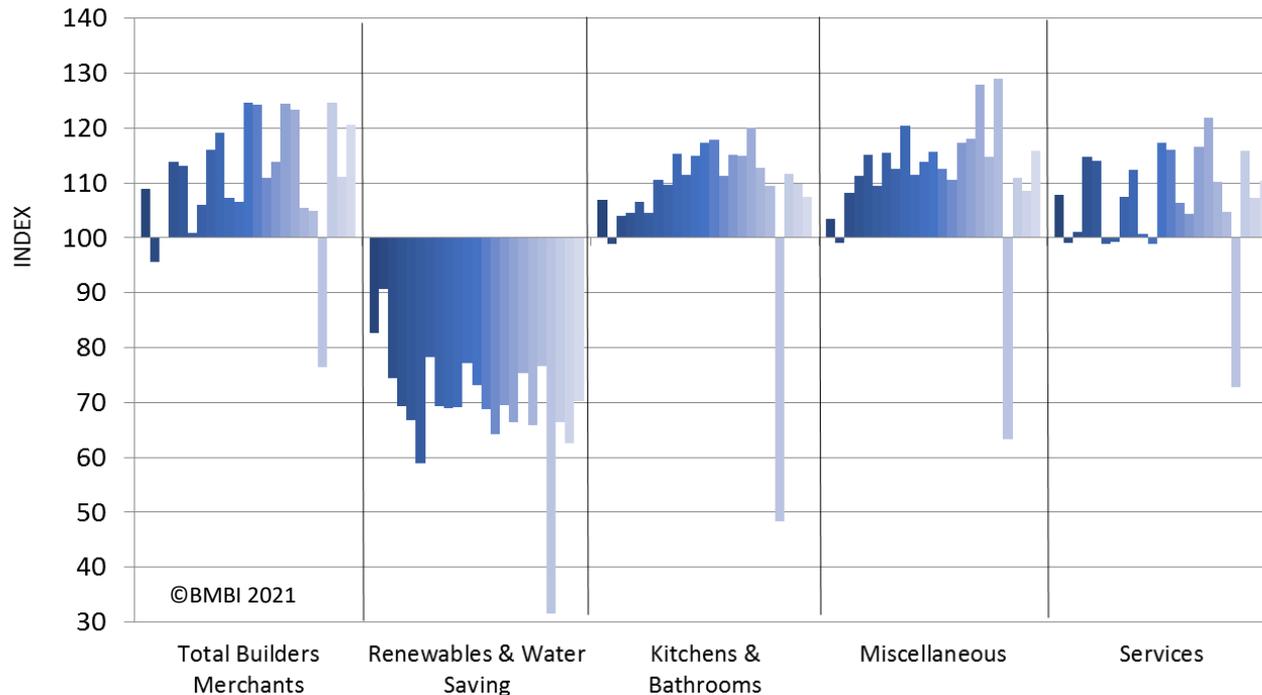
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q1 2021

- Q3, 2015
- Q4, 2015
- Q1, 2016
- Q2, 2016
- Q3, 2016
- Q4, 2016
- Q1, 2017
- Q2, 2017
- Q3, 2017
- Q4, 2017
- Q1, 2018
- Q2, 2018
- Q3, 2018
- Q4, 2018
- Q1, 2019
- Q2, 2019
- Q3, 2019
- Q4, 2019
- Q1 2020
- Q2 2020
- Q3 2020
- Q4 2020
- Q1 2021

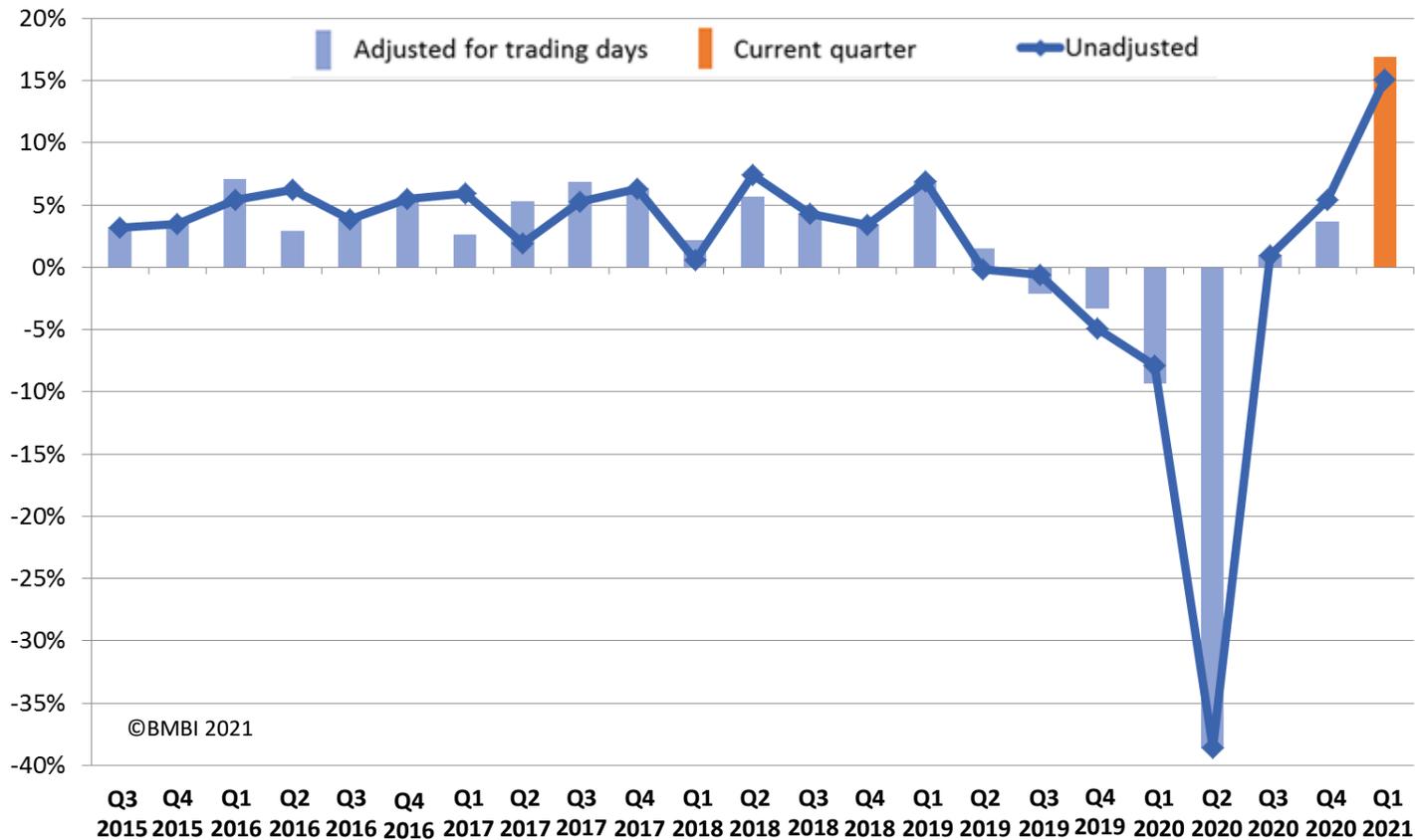


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year



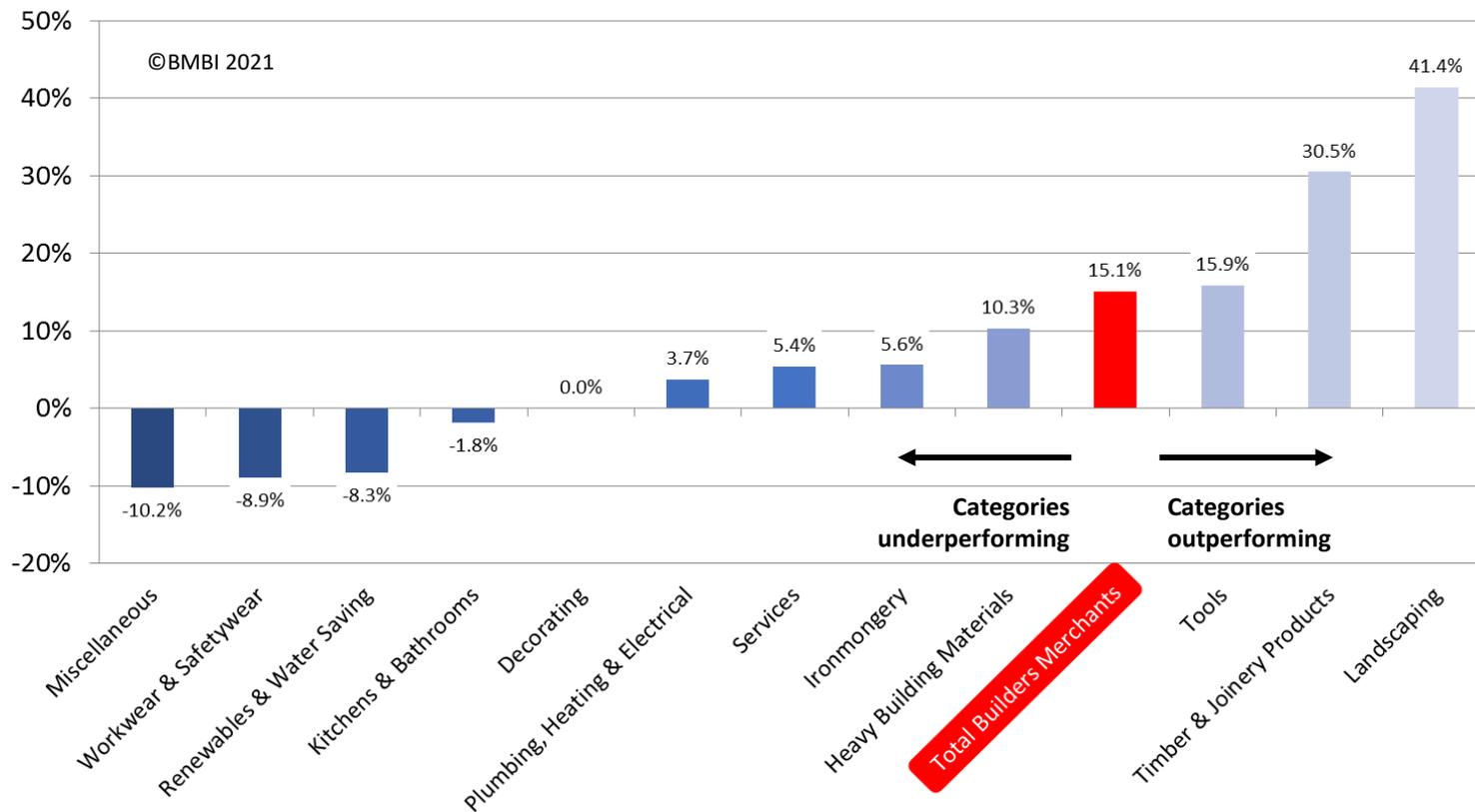
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: This Year v Last Year

Q1 2021 sales indices



Quarter 1 2021 index v Quarter 1 2020 index



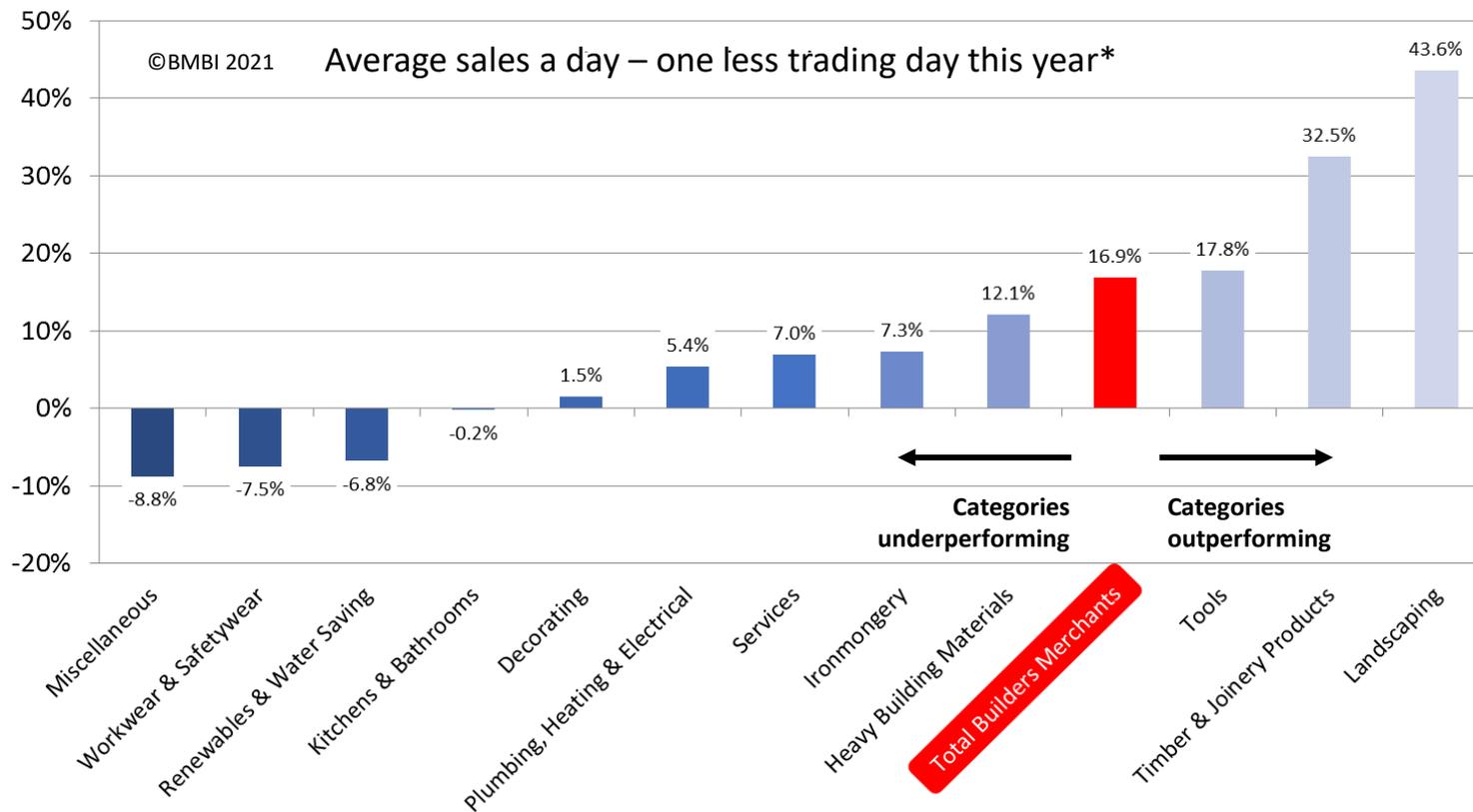
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: This Year v Last Year

Q1 2021 average sales a day indices



Quarter 1 2021 index v Quarter 1 2020 index



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

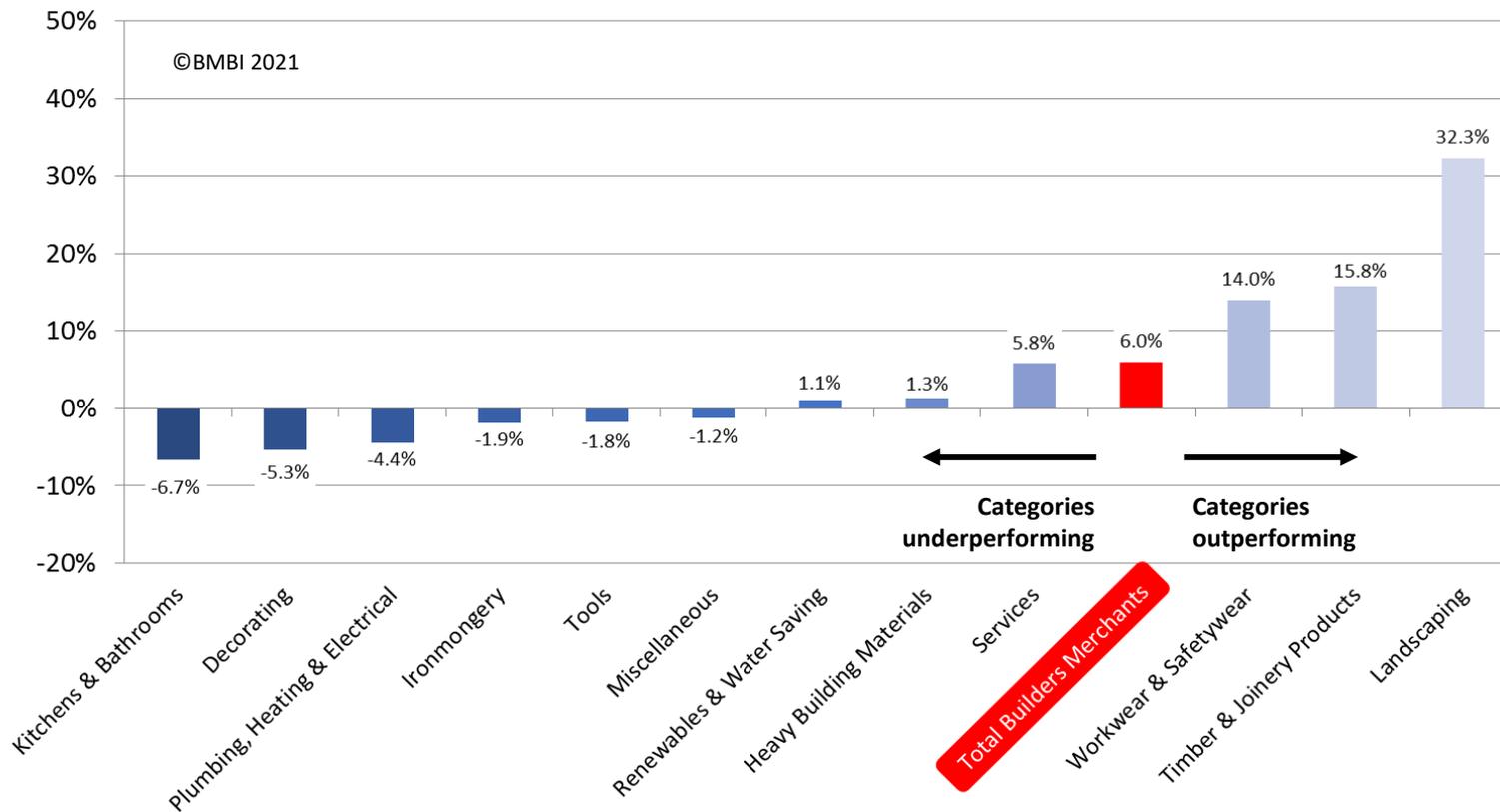
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

Quarterly: This Year v Q1 2019

Q1 2021 2-year sales indices



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



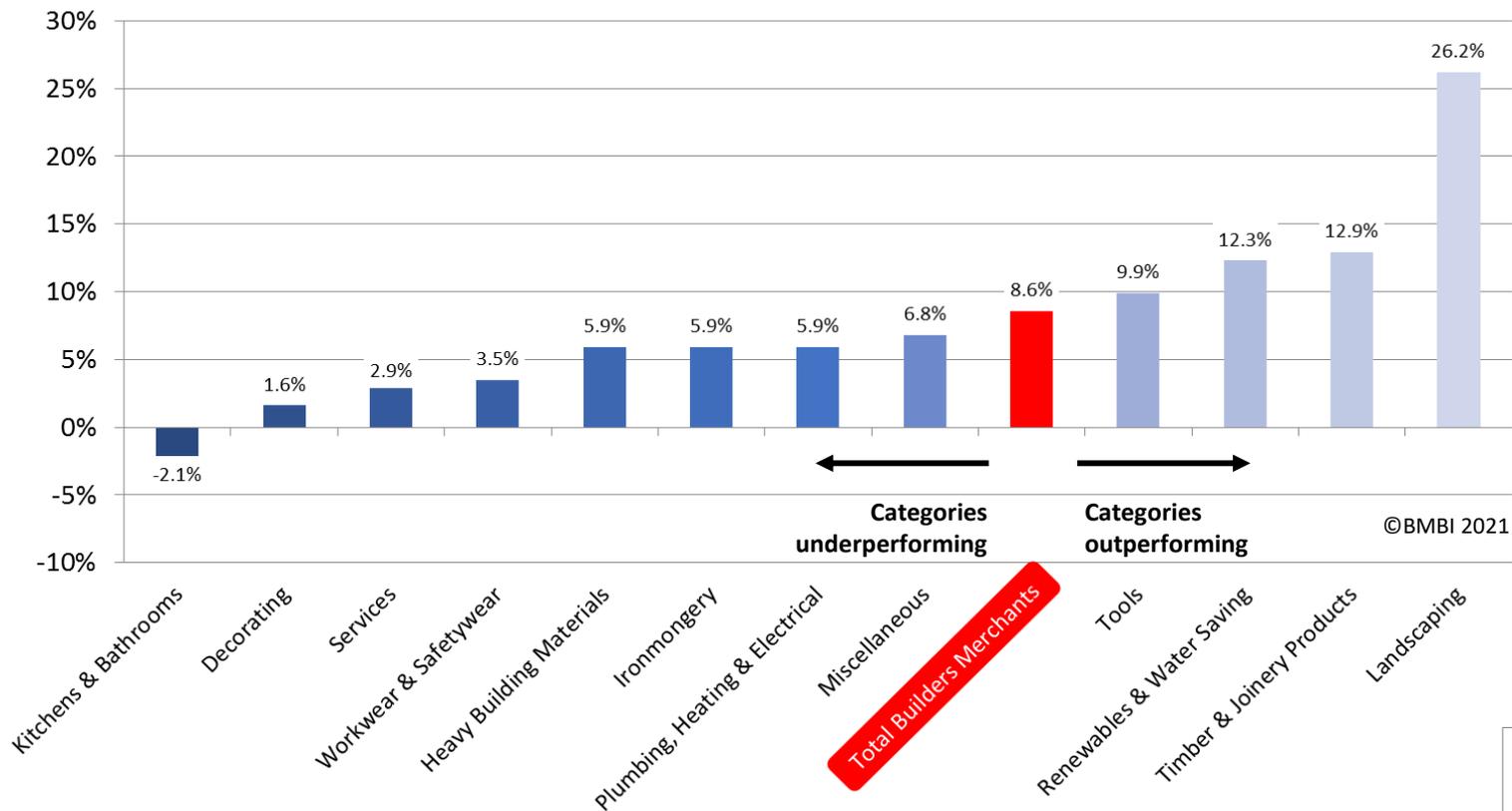
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: Quarter on Quarter

Q1 2021 sales indices



Quarter 1 2021 index v Quarter 4 2020 index



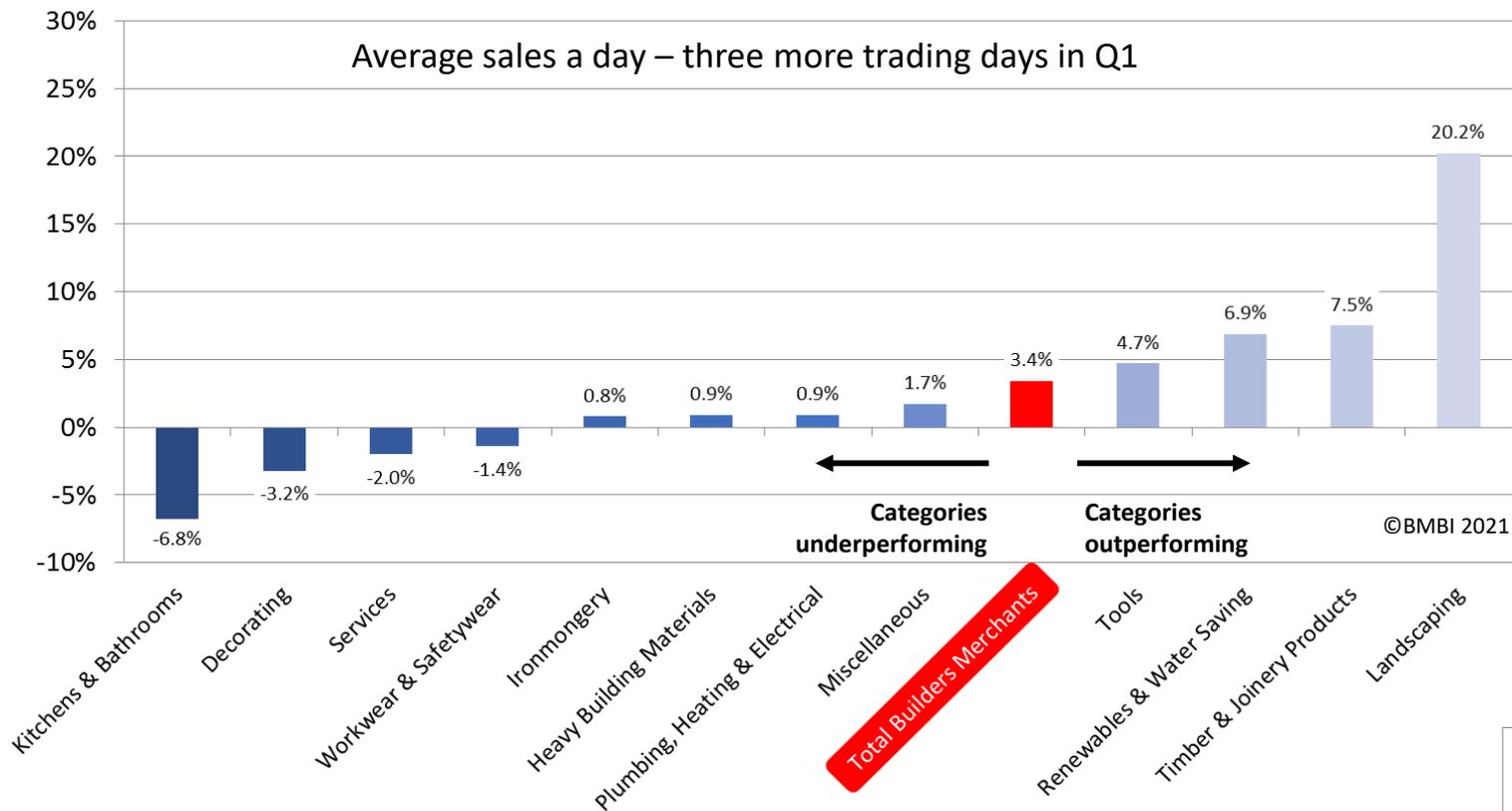
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to March 2021

Quarterly: Quarter on Quarter

Q1 2021 average sales a day indices



Quarter 1 2021 index v Quarter 4 2020 index

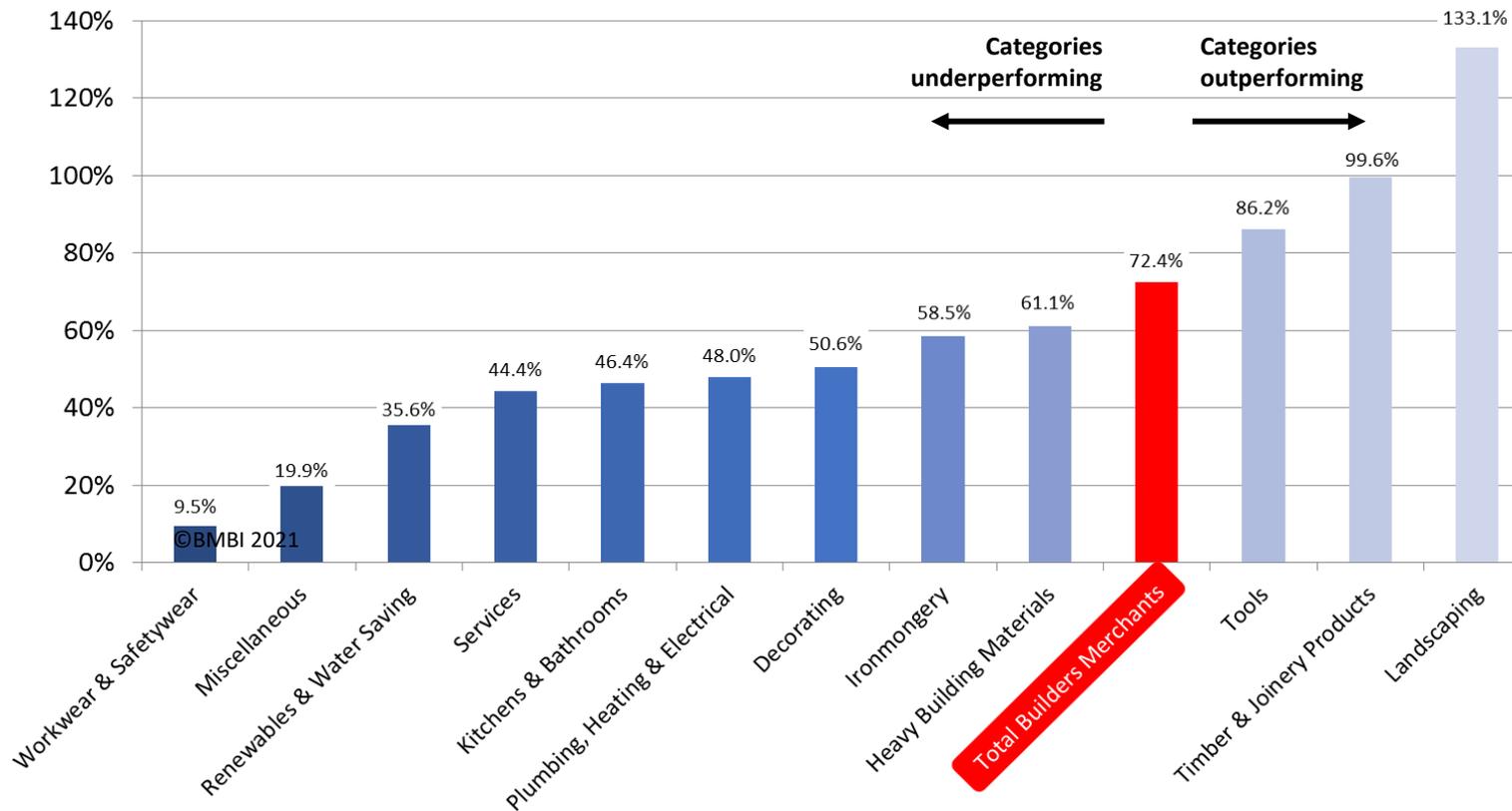


Source: GfK's Builders Merchants Total Category Report July 2015 to March 2021

Latest 3 months: v last year

February to April sales indices

3 months Feb 21 to Apr 21 v 3 months Feb 20 to Apr 20



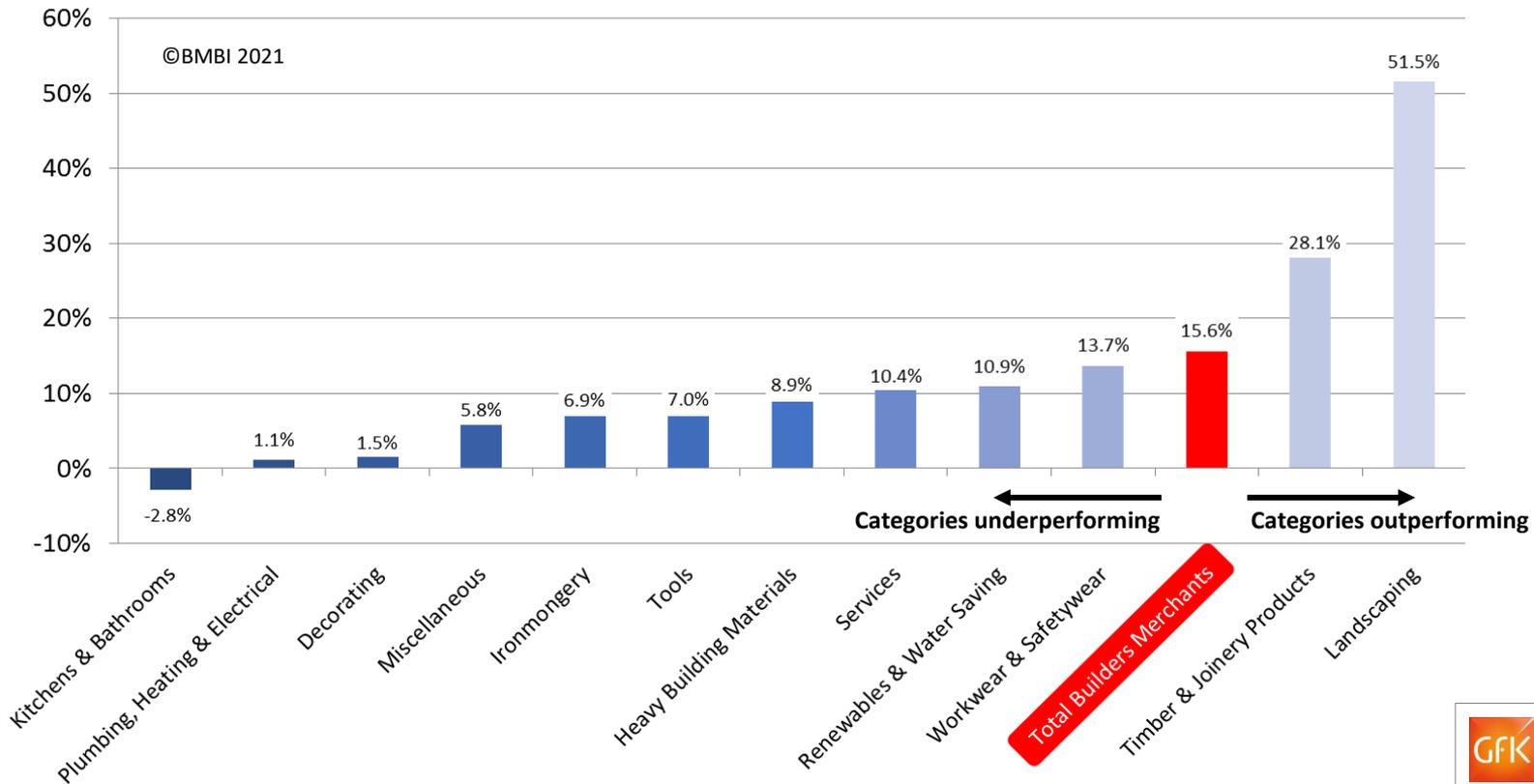
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Latest 3 months: v 2019

February to April 2-year sales indices



2-year comparison: Feb 21 to Apr 21 v Feb 19 to Apr 19



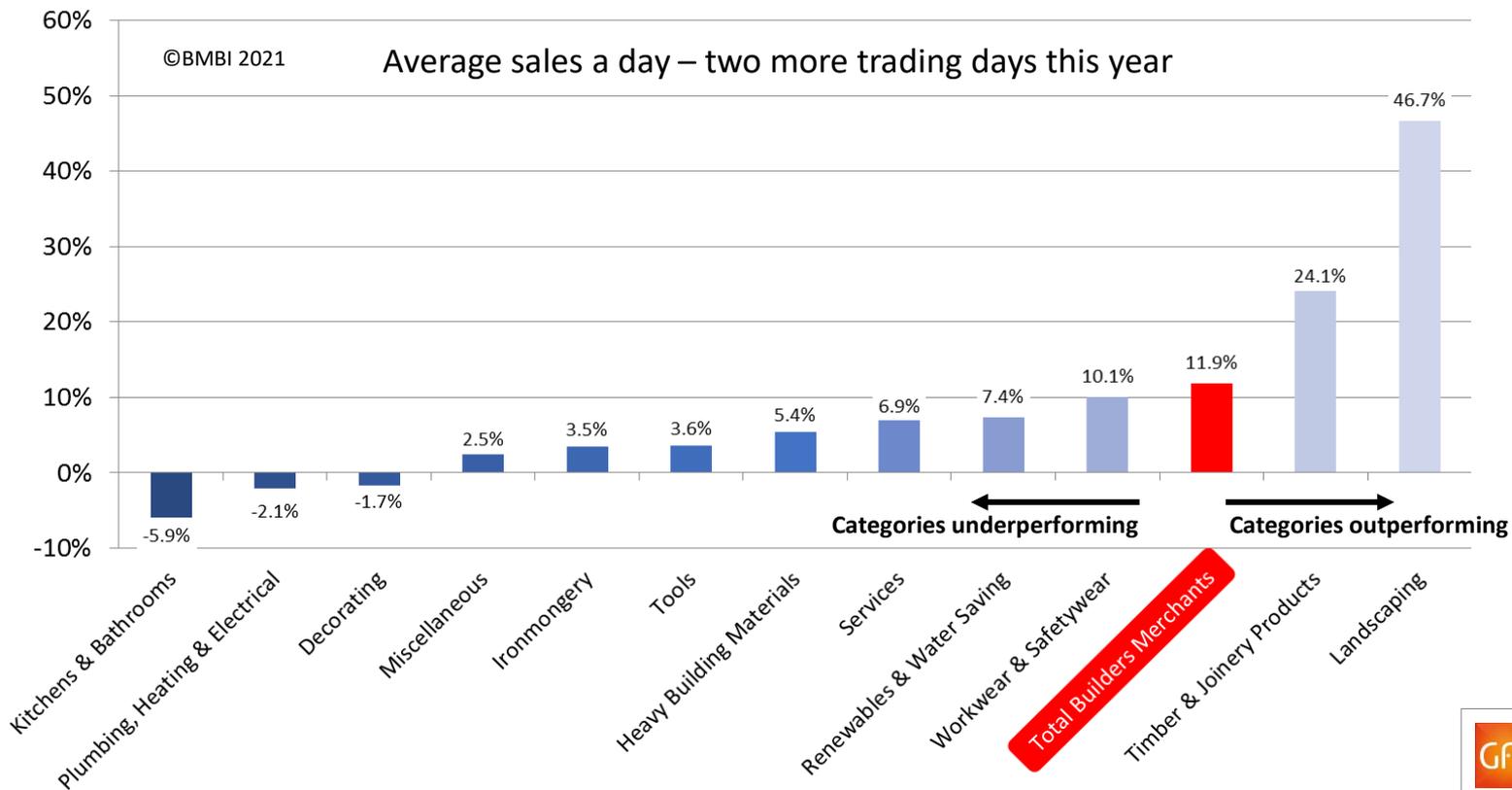
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Latest 3 months: v 2019

February to April 2-year average sales a day indices



2-year comparison: Feb 21 to Apr 21 v Feb 19 to Apr 19

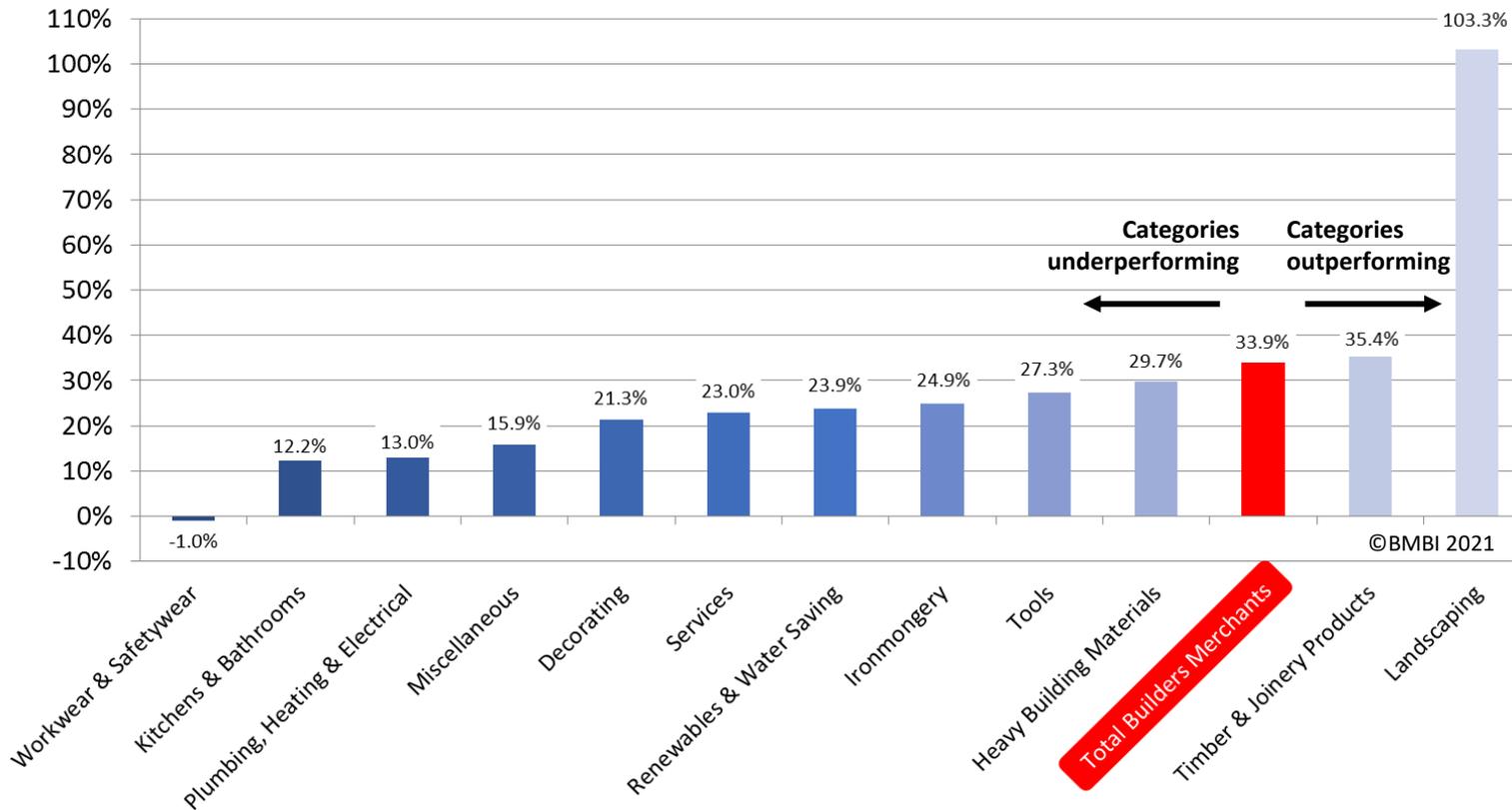


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Latest 3 months: v previous 3 months

February to April sales indices

3 months Feb 21 to Apr 21 v 3 months Nov 20 to Jan 21



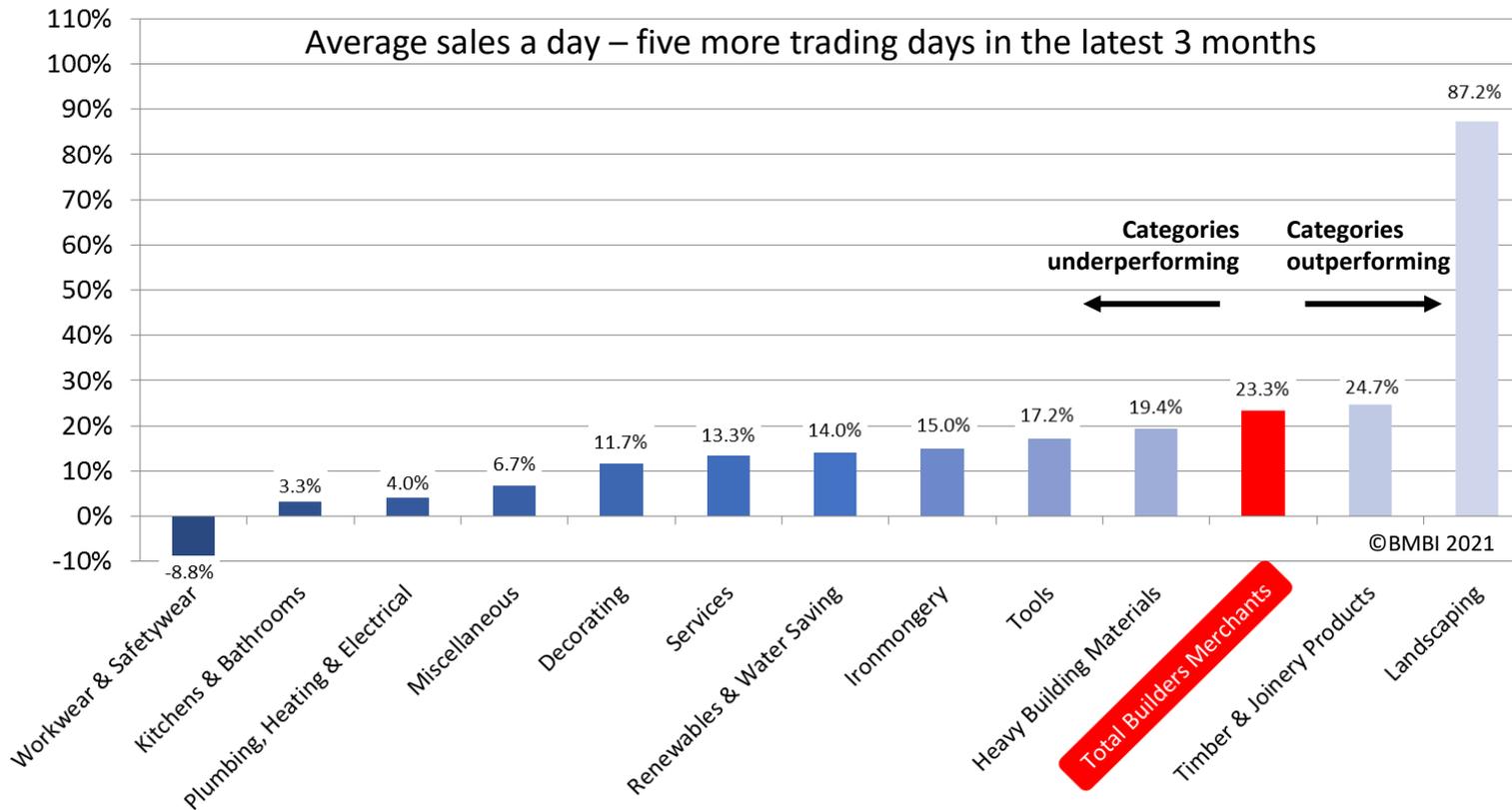
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Latest 3 months: v previous 3 months

February to April average sales a day indices



3 months Feb 21 to Apr 21 v 3 months Nov 20 to Jan 21

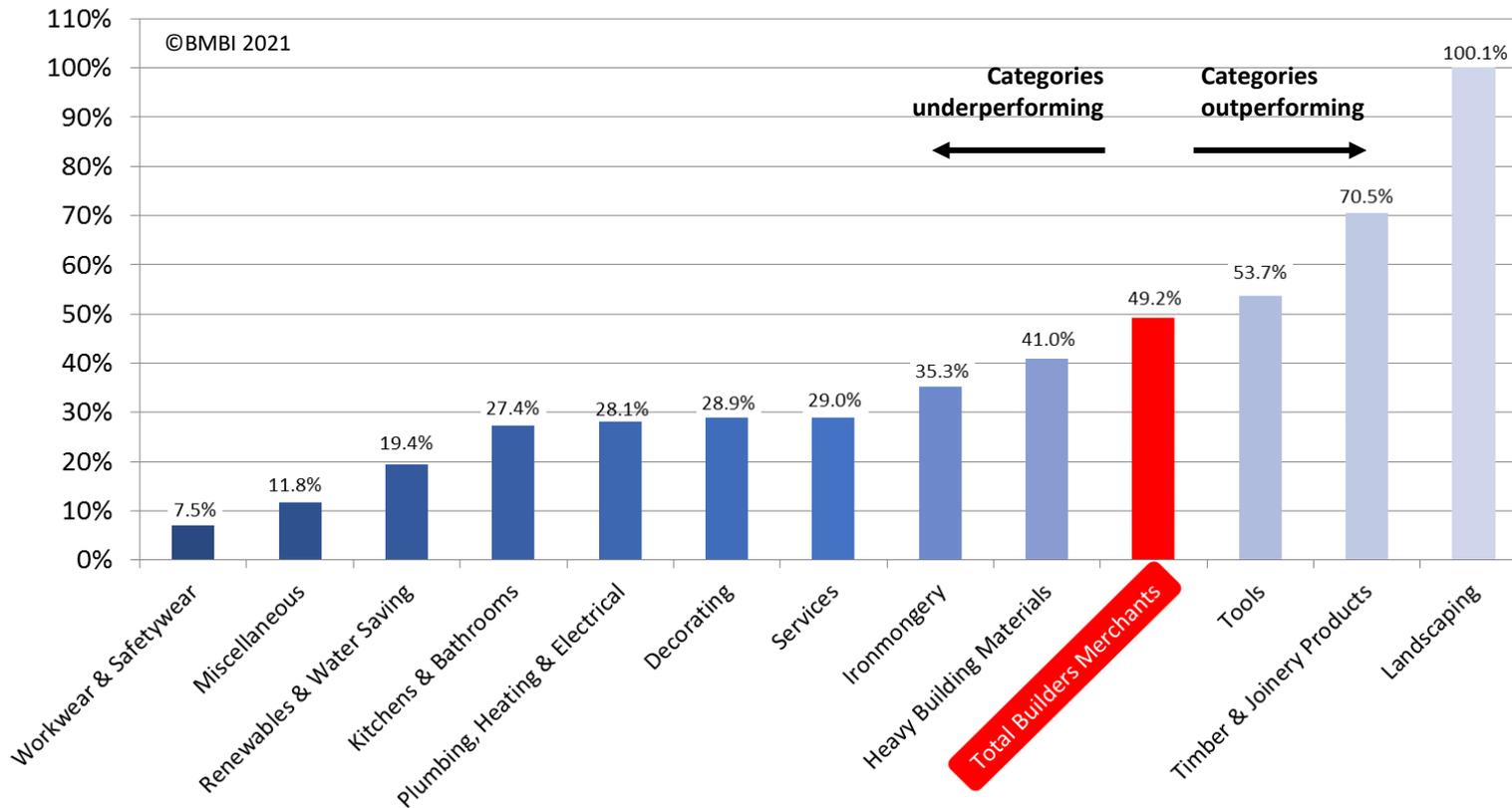


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Year to date: Year on Year

Last 4 months sales indices

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



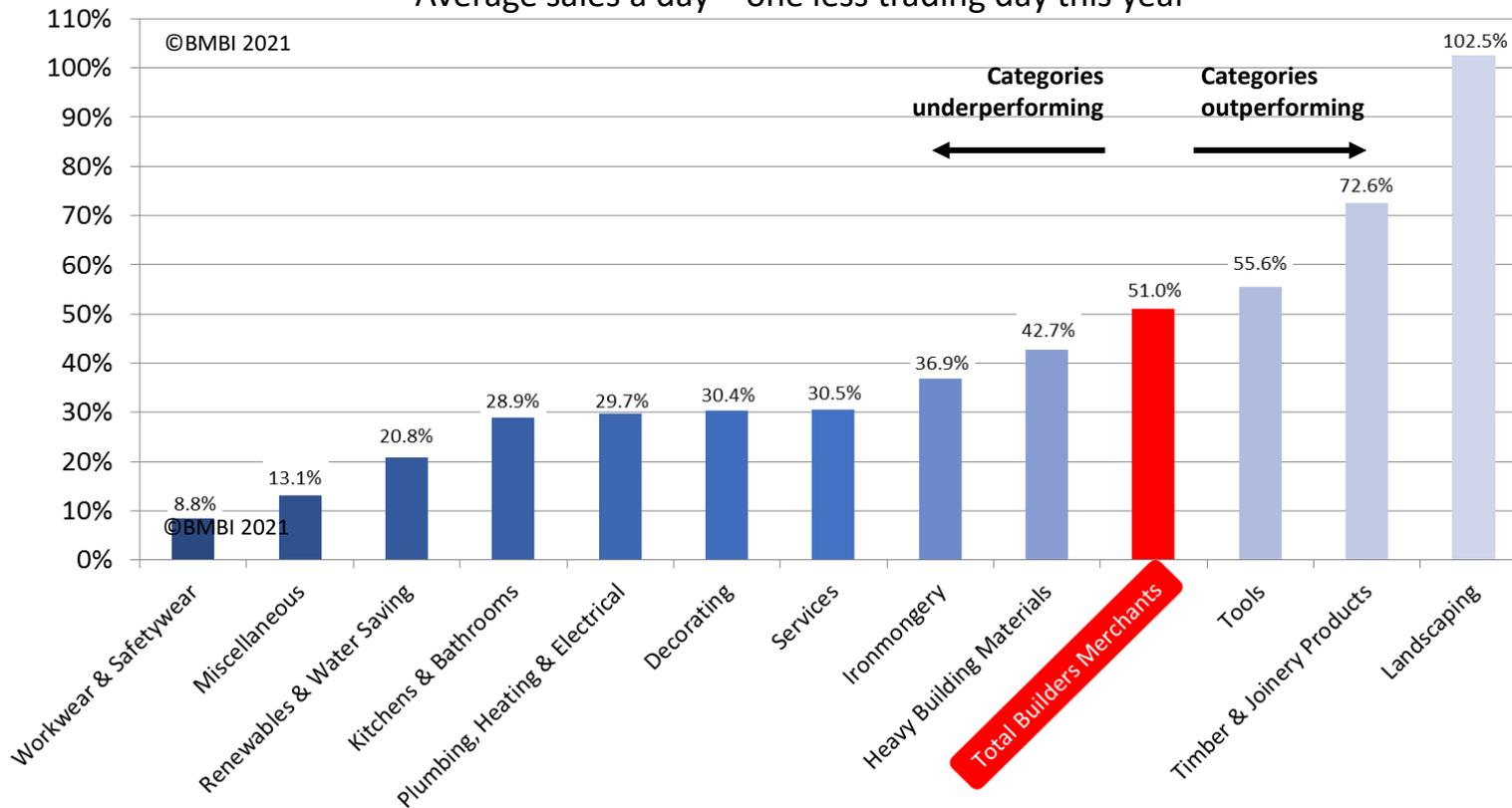
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Year to date: Year on Year

Last 4 months average sales a day indices

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

Average sales a day – one less trading day this year

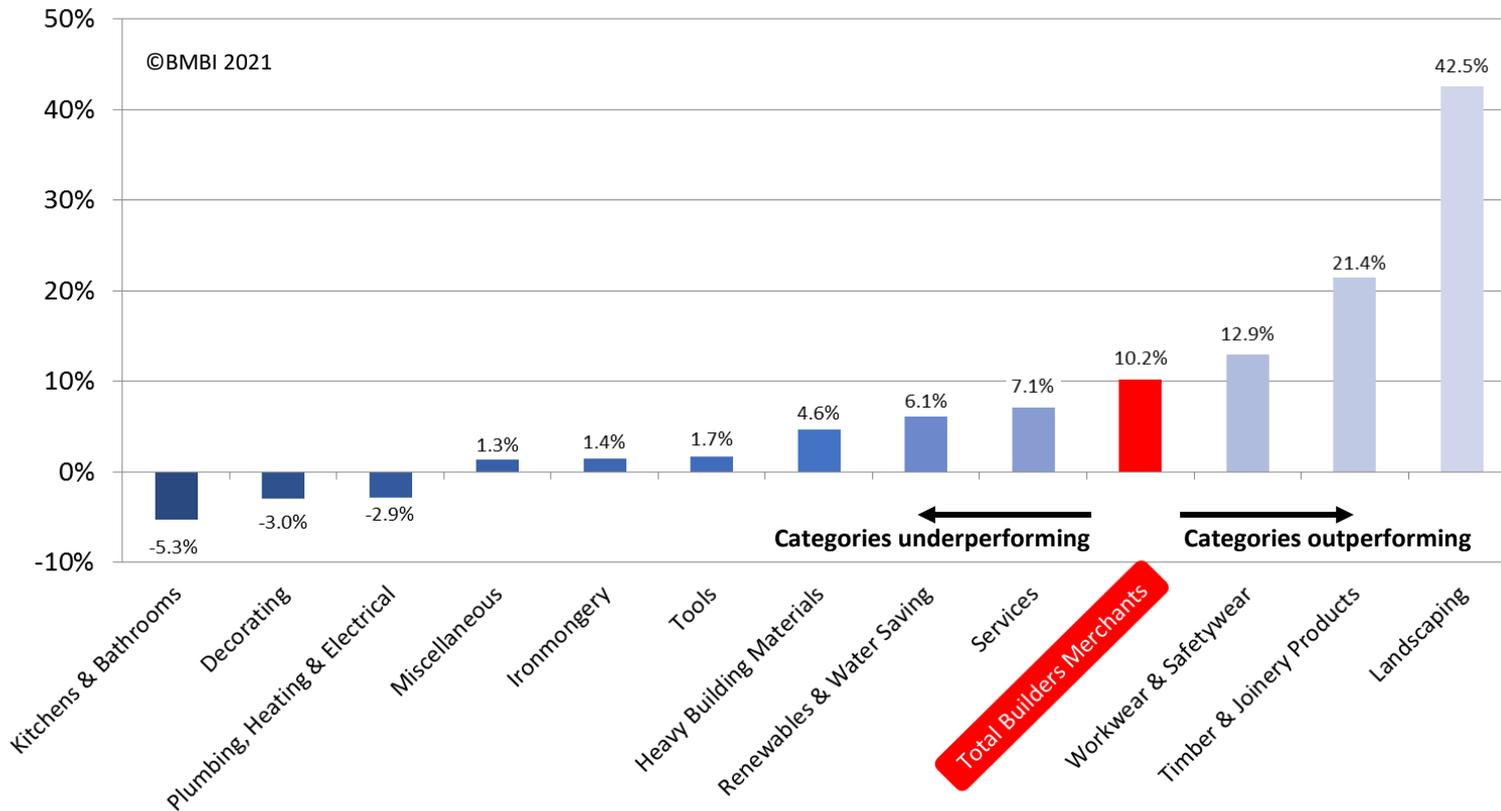


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Year to date: v 2019

Last 4 months 2-year sales indices

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

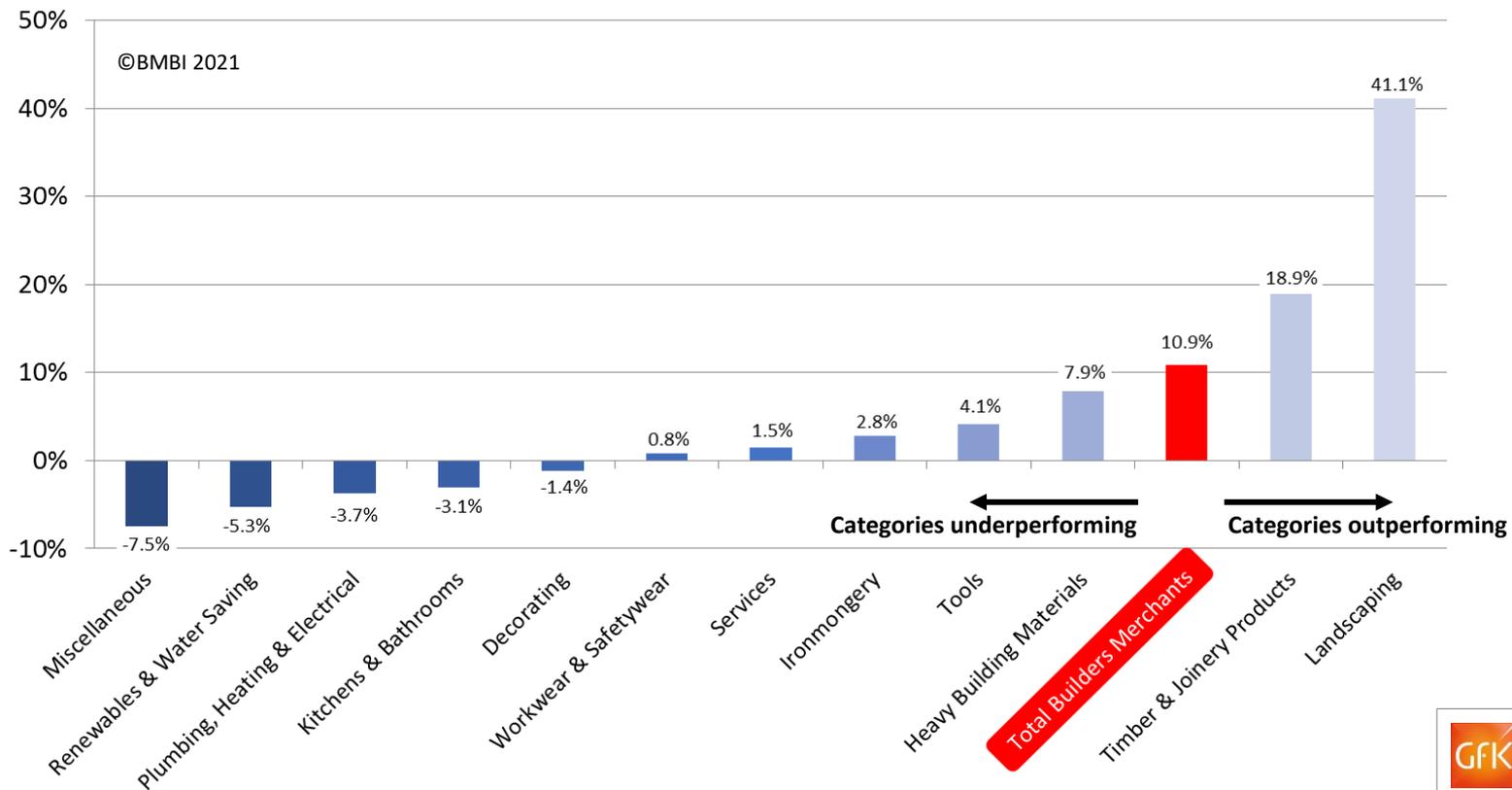


GfK Source: GfK's Builders Merchants Total Category Report July 2015 to April 2021

Last 12 months: Year on Year

MAT

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

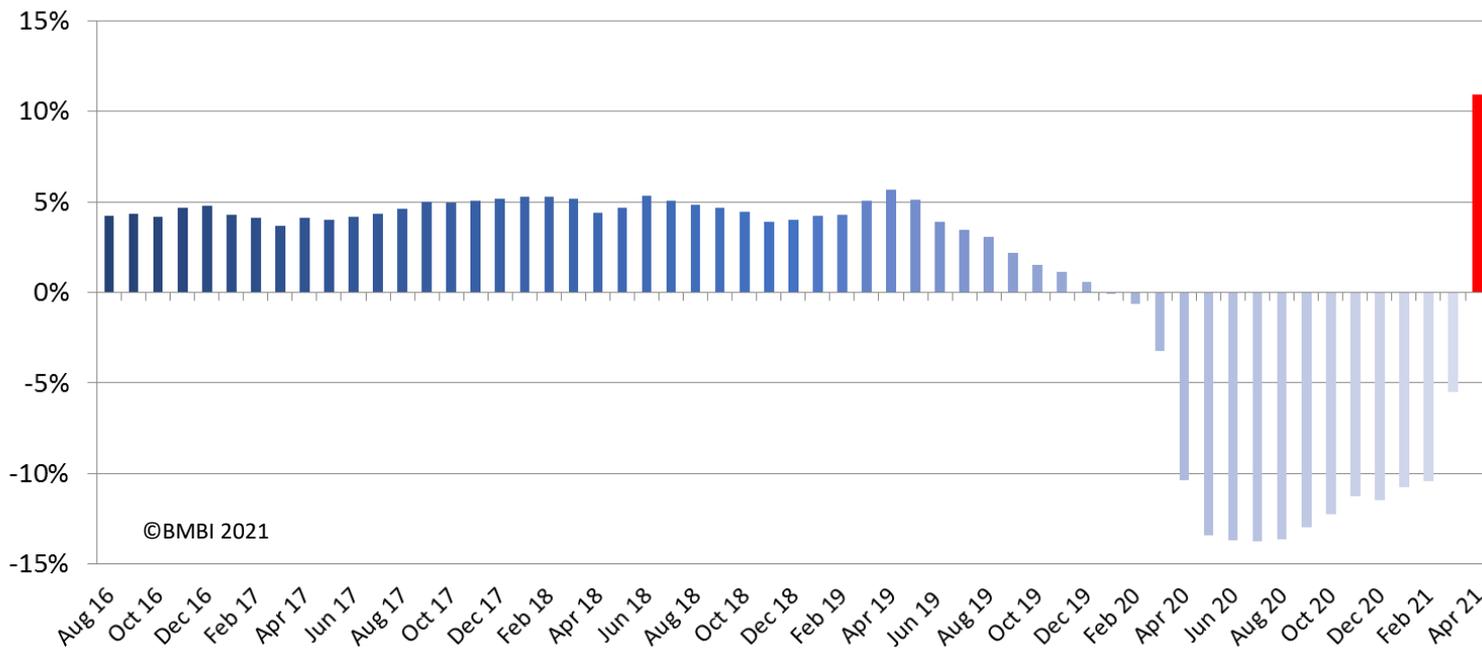


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

12 months: Year on Year

MAT

MAT: Total Builders Merchants August 2016 to April 2021



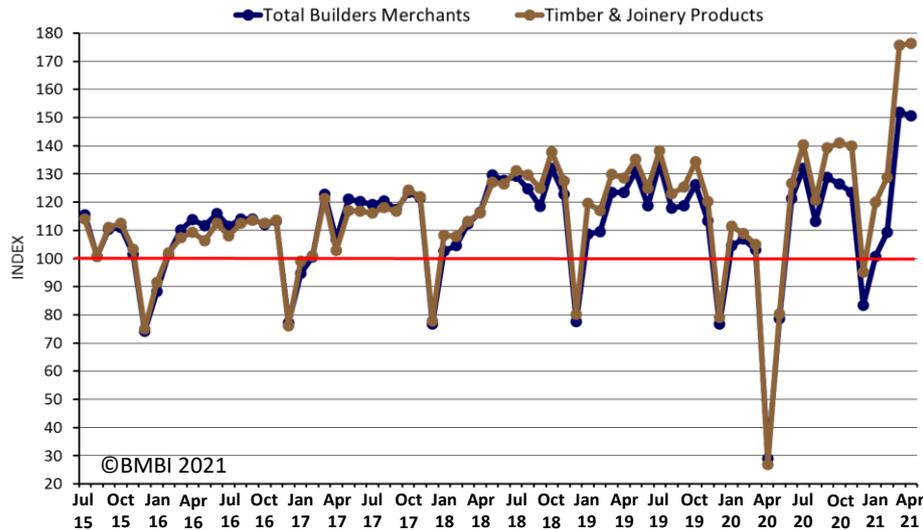
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: Indices

April 2021

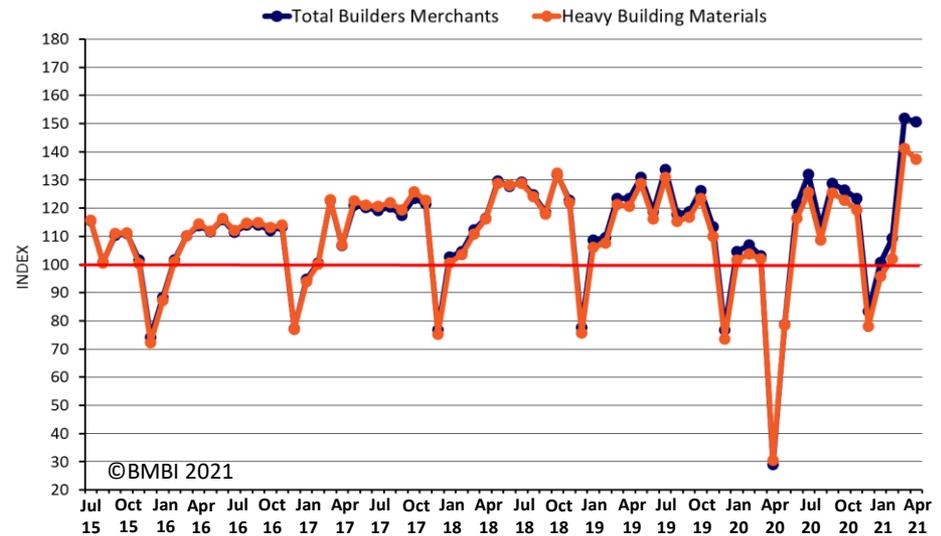


Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



Indexed on July 2014 – June 2015

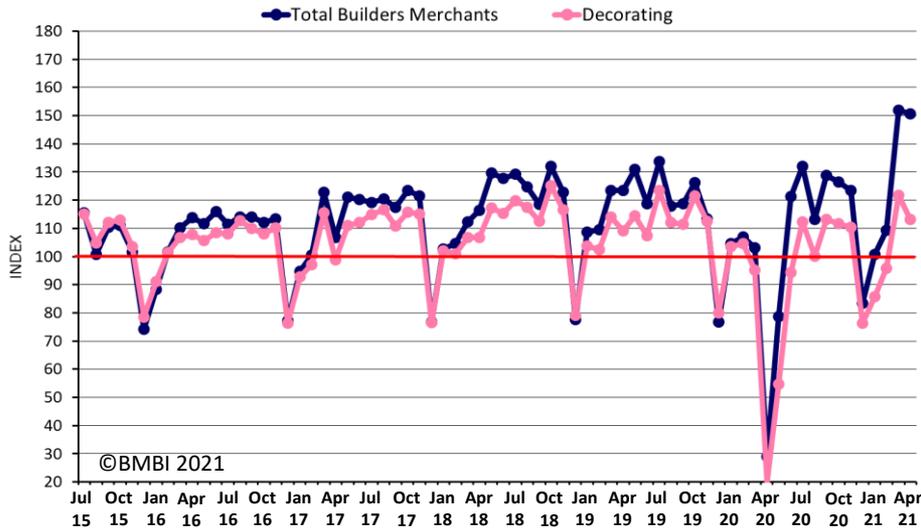
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: Indices

April 2021

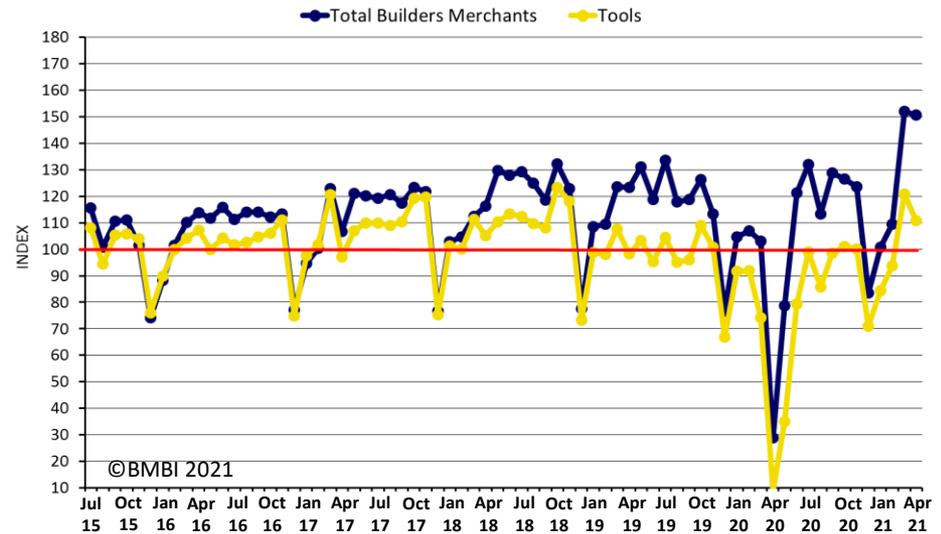


Decorating



Indexed on July 2014 – June 2015

Tools



Indexed on July 2014 – June 2015

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

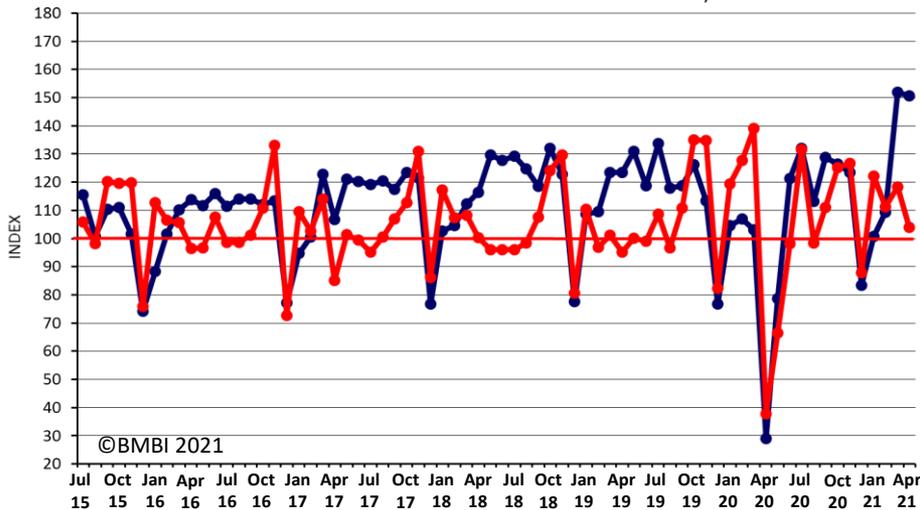
Monthly: Indices

April 2021



Workwear & Safetywear

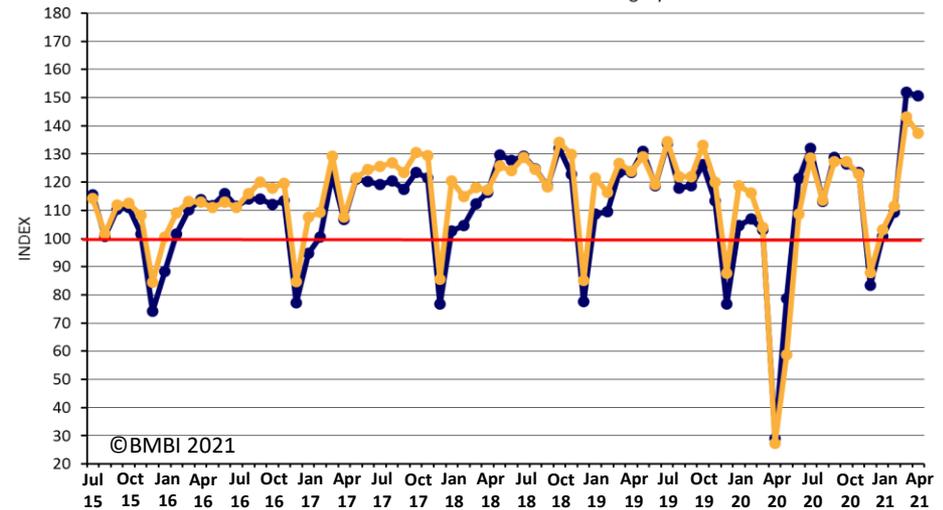
— Total Builders Merchants — Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery

— Total Builders Merchants — Ironmongery



Indexed on July 2014 – June 2015

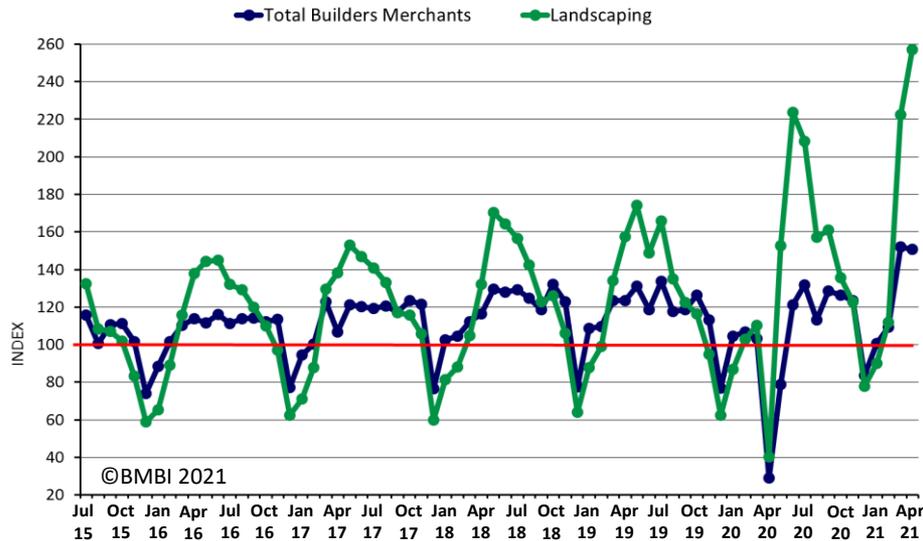
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to April 2021

Monthly: Indices

April 2021

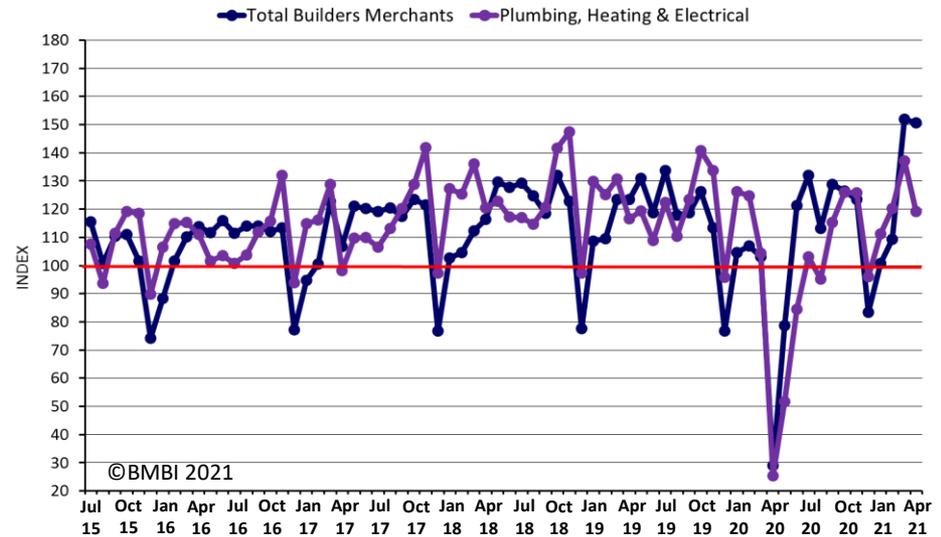


Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

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

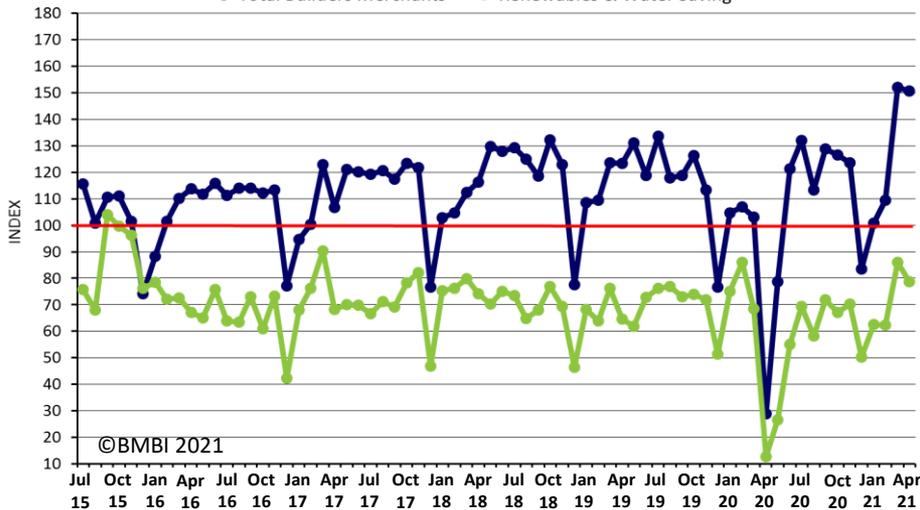
Monthly: Indices

April 2021



Renewables & Water Saving

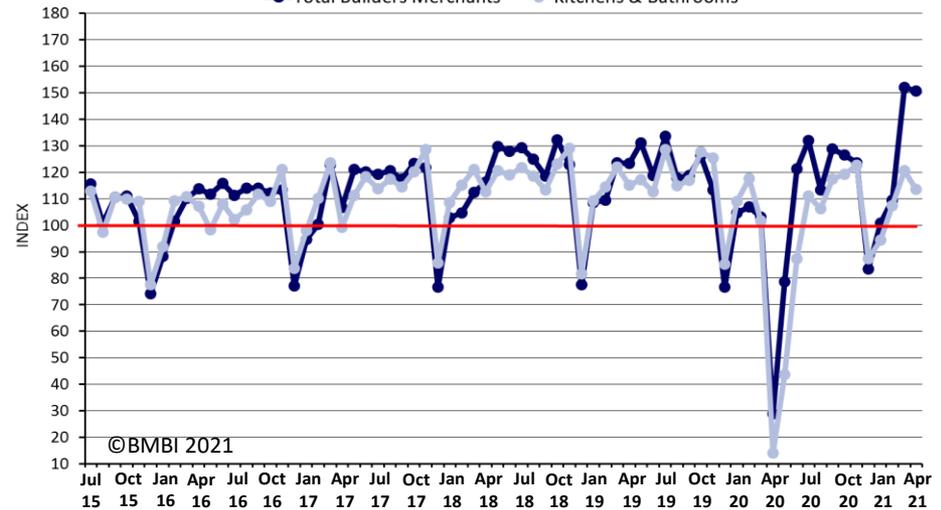
● Total Builders Merchants ● Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms

● Total Builders Merchants ● Kitchens & Bathrooms



Indexed on July 2014 – June 2015

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

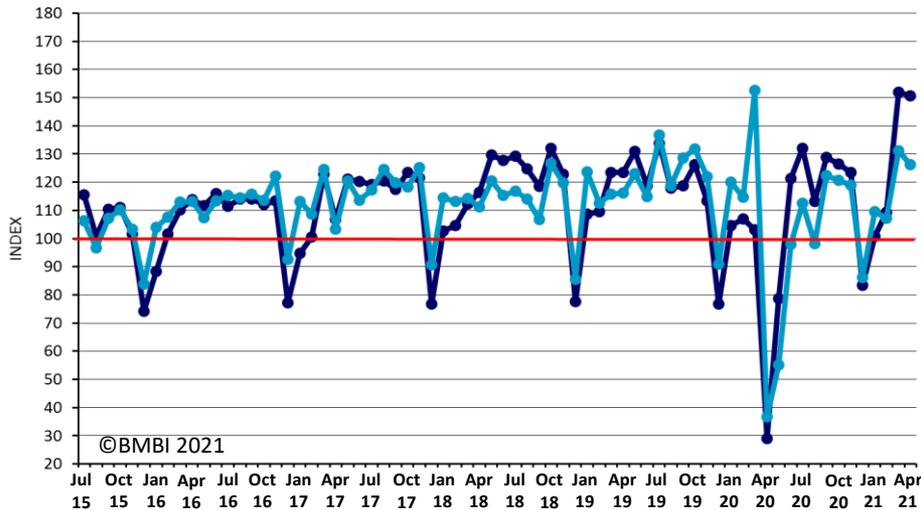
Monthly: Indices

April 2021



Miscellaneous

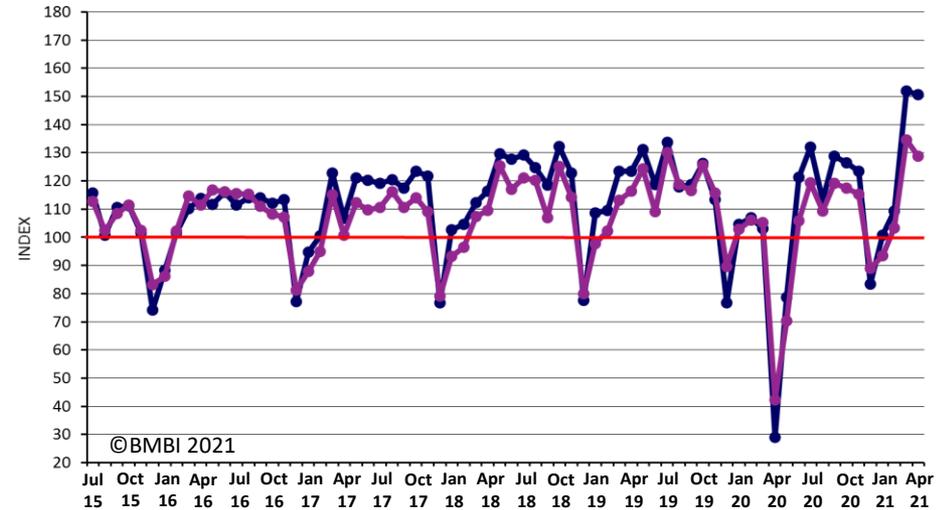
◆ Total Builders Merchants ◆ Miscellaneous



Indexed on July 2014 – June 2015

Services

◆ Total Builders Merchants ◆ Services



Indexed on July 2014 – June 2015

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

Quarterly

Index: 62.3

2015			
		Q3	Q4
		64	60
2016			
Q1	Q2	Q3	Q4
62	63	65	60
2017			
Q1	Q2	Q3	Q4
64	61	64	60
2018			
Q1	Q2	Q3	Q4
63	62	64	60
2019			
Q1	Q2	Q3	Q4
63	61	65	59
2020			
Q1	Q2	Q3	Q4
64	61	65	60
2021			
Q1	Q2	Q3	Q4
63			

Half Year

2015	
	H2
	124
2016	
H1	H2
125	125
2017	
H1	H2
125	124
2018	
H1	H2
125	124
2019	
H1	H2
124	124
2020	
H1	H2
125	125
2021	
H1	H2

Full Year

2016
250
2017
249
2018
249
2019
248
2020
250
2021

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

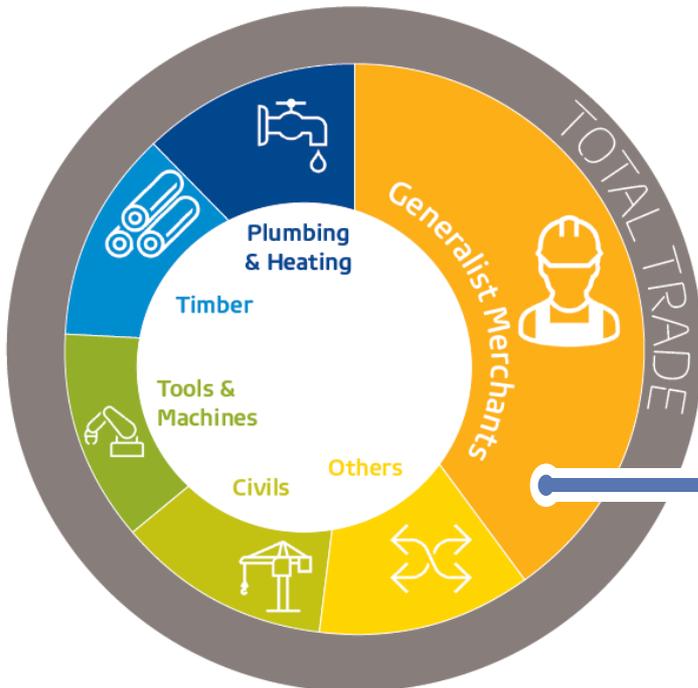
GfK's Definition of Builders Merchant Panel



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

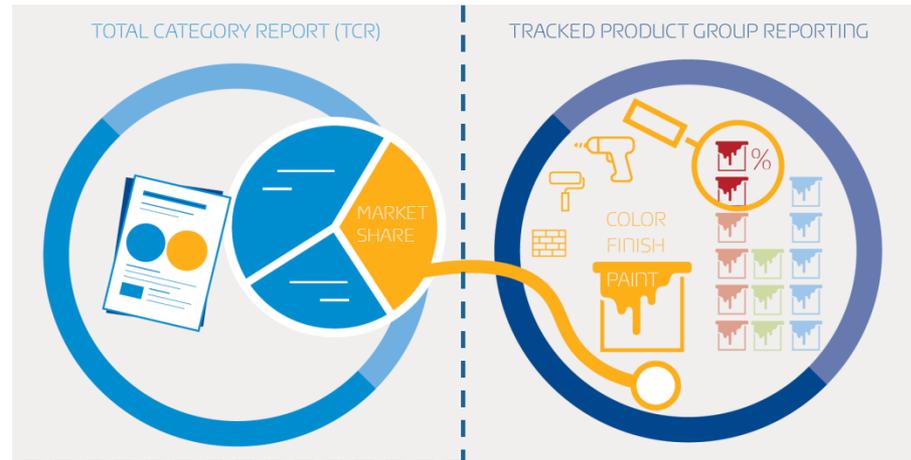
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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)

“building **excellence**
in materials supply”

Plumbing & Heating Merchant Index



April 2021

(Published 18 June 2021)

A Builders Merchant Building Index Publication

Introduction:

Plumbing & Heating Merchant Index



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

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

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

PHMI Experts

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

More data available

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

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

Overview and Insights

Plumbing and heating merchants see big year-on-year gains in Covid-19 anniversary

The first anniversary of Covid-19 Lockdown 1 resulted in big year-on-year gains. Plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 192.4% in April 2021 compared with April 2020. That means merchants sold almost three times as much this April as they did in April last year. (See [page 58](#)).

Looking back over two years, it is possible to see how well the market performed – by benchmarking 2021 against more normal trading conditions and validating the strength of this year's trading. April 2021 was 4.3% higher than April 2019.

Value sales in April were 13.8% lower than in March ([page 59](#)), not helped by three fewer trading days this month. Average sales a day were 0.9% lower.

The latest three months (February to April) saw sales 40.3% higher than the same three months in 2020 ([page 60](#)), with one more trading day in 2021. Average sales a day were 38.1% higher.

Sales in February to April 2021 were 6.6% higher than in February to April 2019, with two more trading days this year. Average sales a day were 3.3% higher.

Comparing the same three months (February to April 2021) with the previous three months (November 2020 to January 2021) saw sales up 9.5% ([page 61](#)), helped by five additional trading days. Average sales a day for February to April, which takes trading day differences into account, were 0.9% higher.

Year to date sales, which cover the four months January to April 2021, were 26.1% higher than in the same four months last year, with one less trading day. Average sales a day were up 27.7%.

Plumbing & Heating Merchants sales in the 12 months May 2020 to April 2021 were almost identical to the same period a year earlier, gaining 0.1%.

April's PHMI Index, which contrasts sales with the base period of January to December 2019, was 101.8 – see the table on [page 56](#) and the chart on [page 57](#). The table also shows the PHMI Index in the last three months (February to April) was marginally higher, at 107.5.

Plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 192.4% in April 2021 compared with April 2020. That means merchants sold almost three times as much this April as they did in April last year.

Indices: Monthly and quarterly

May 2020 to April 2021

(Indexed on January to December 2019)

May 20	Jun 20	Jul 20	Three months
46.0	73.4	88.3	69.2
Aug 20	Sep 20	Oct 20	Three months
85.9	103.0	115.2	101.3
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

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

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

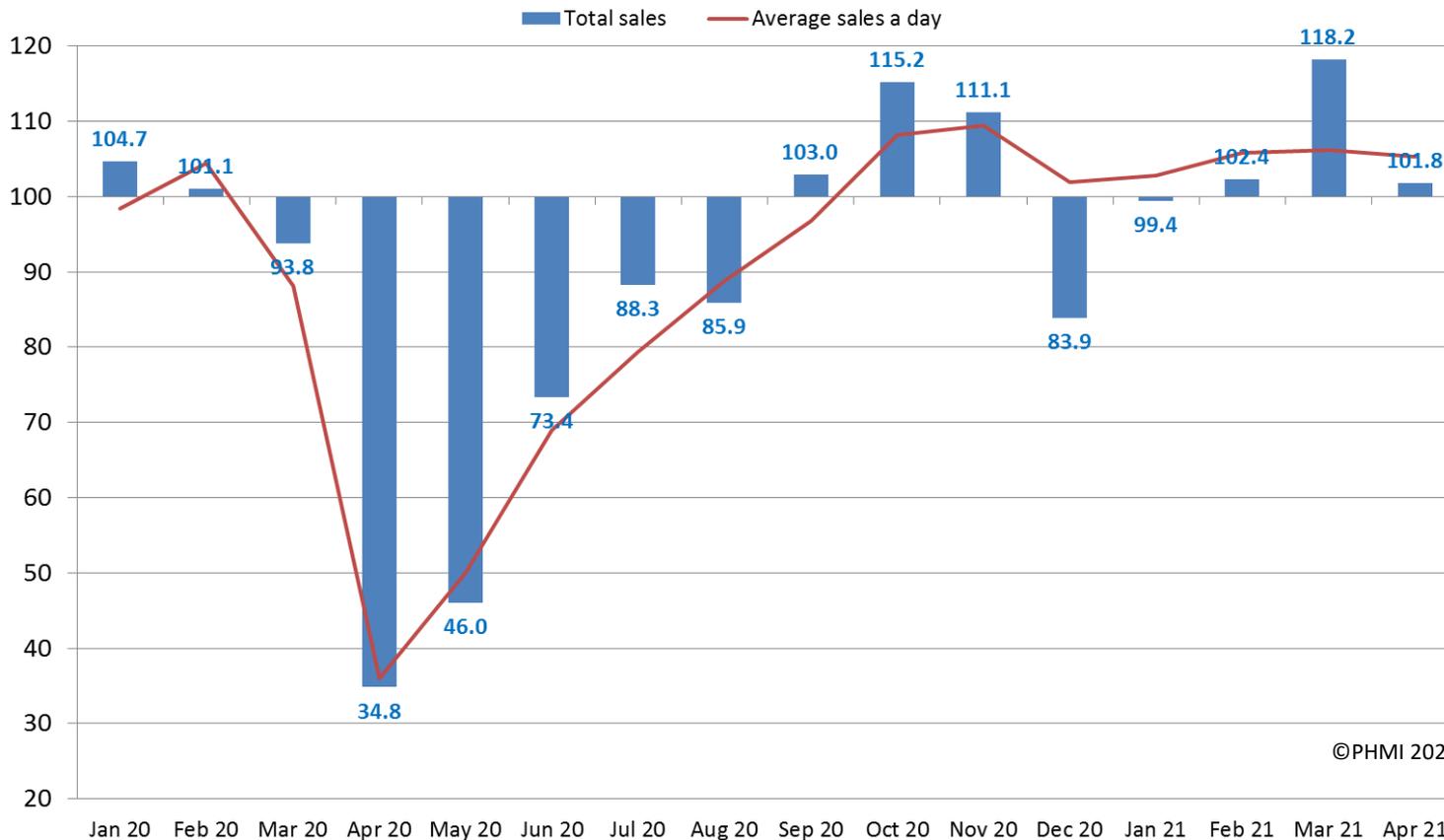
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. January's Index of 99.4 means turnover was 0.6% lower than the base period.

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

Monthly: Index

Adjusted and unadjusted for trading days*

Indices: January 2020 to April 2021



Value figures
shown for Total
sales

©PHMI 2021

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

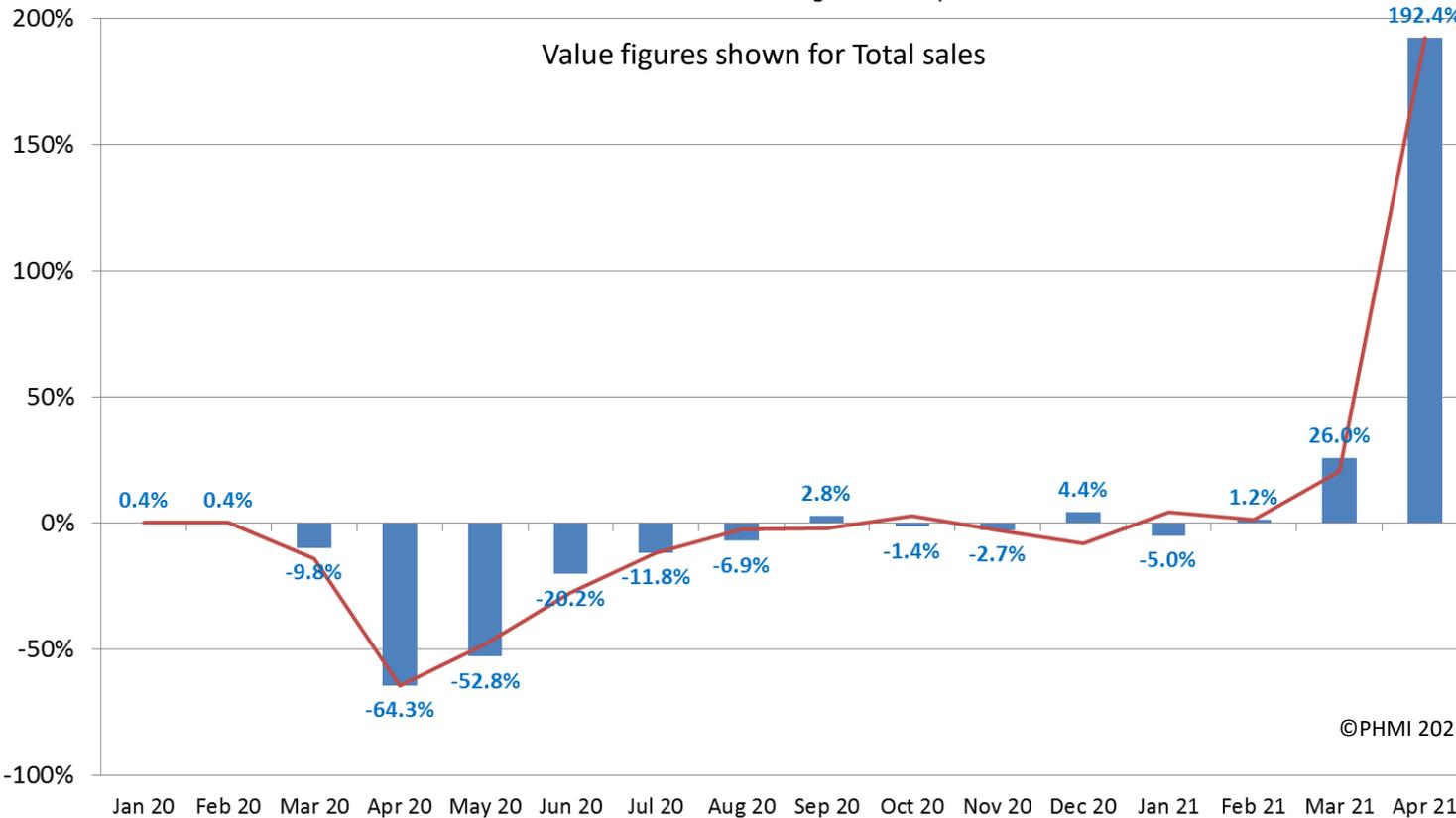
Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted for trading days*

Month: year on year

■ Total sales — Average sales a day

Value figures shown for Total sales



+192.4% is almost three times last year's value sales.

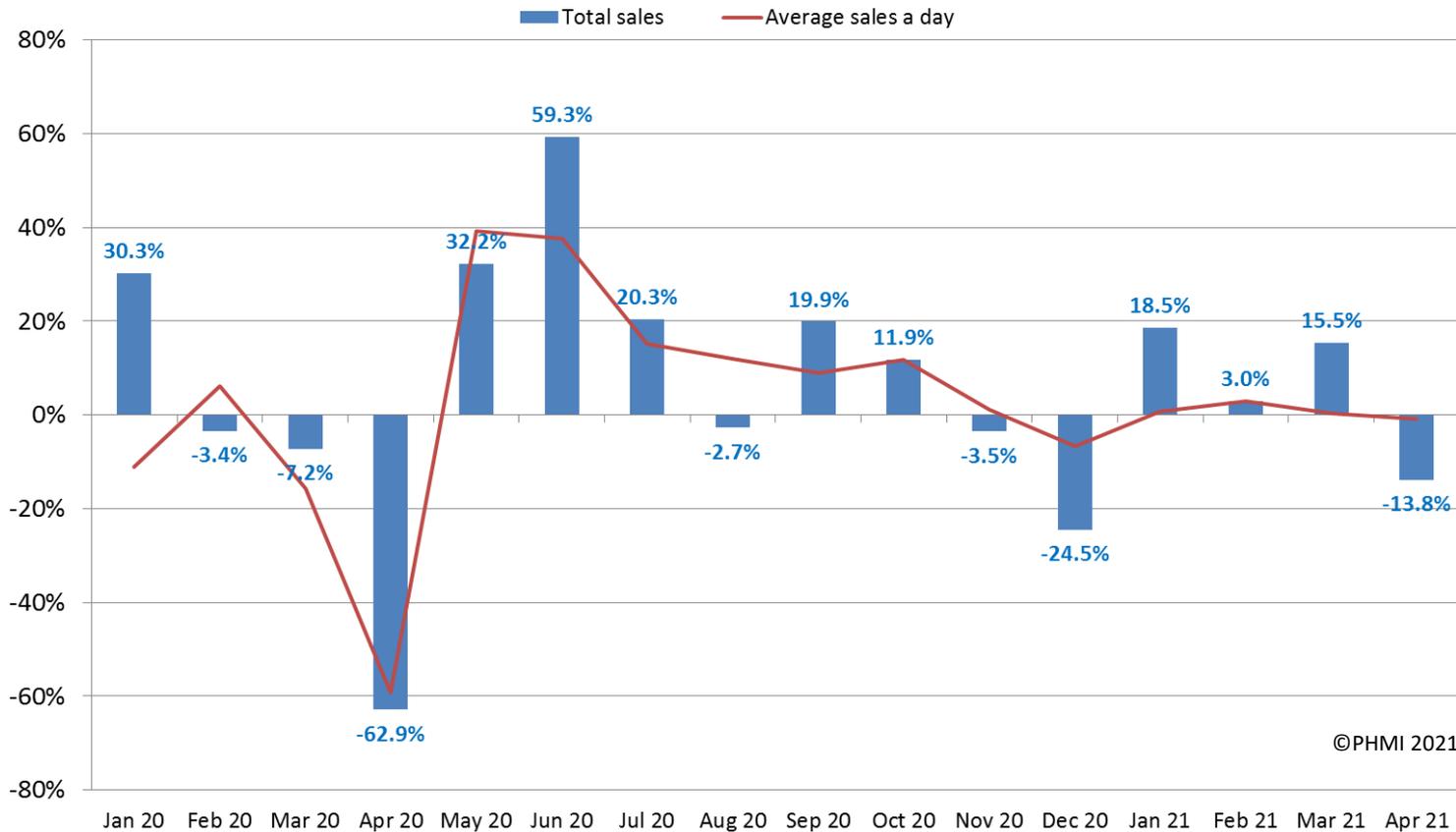
©PHMI 2021

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

Monthly: Month v previous month

Sales indices, adjusted and unadjusted
for trading days*

Month v previous month



Value figures
shown for Total
sales

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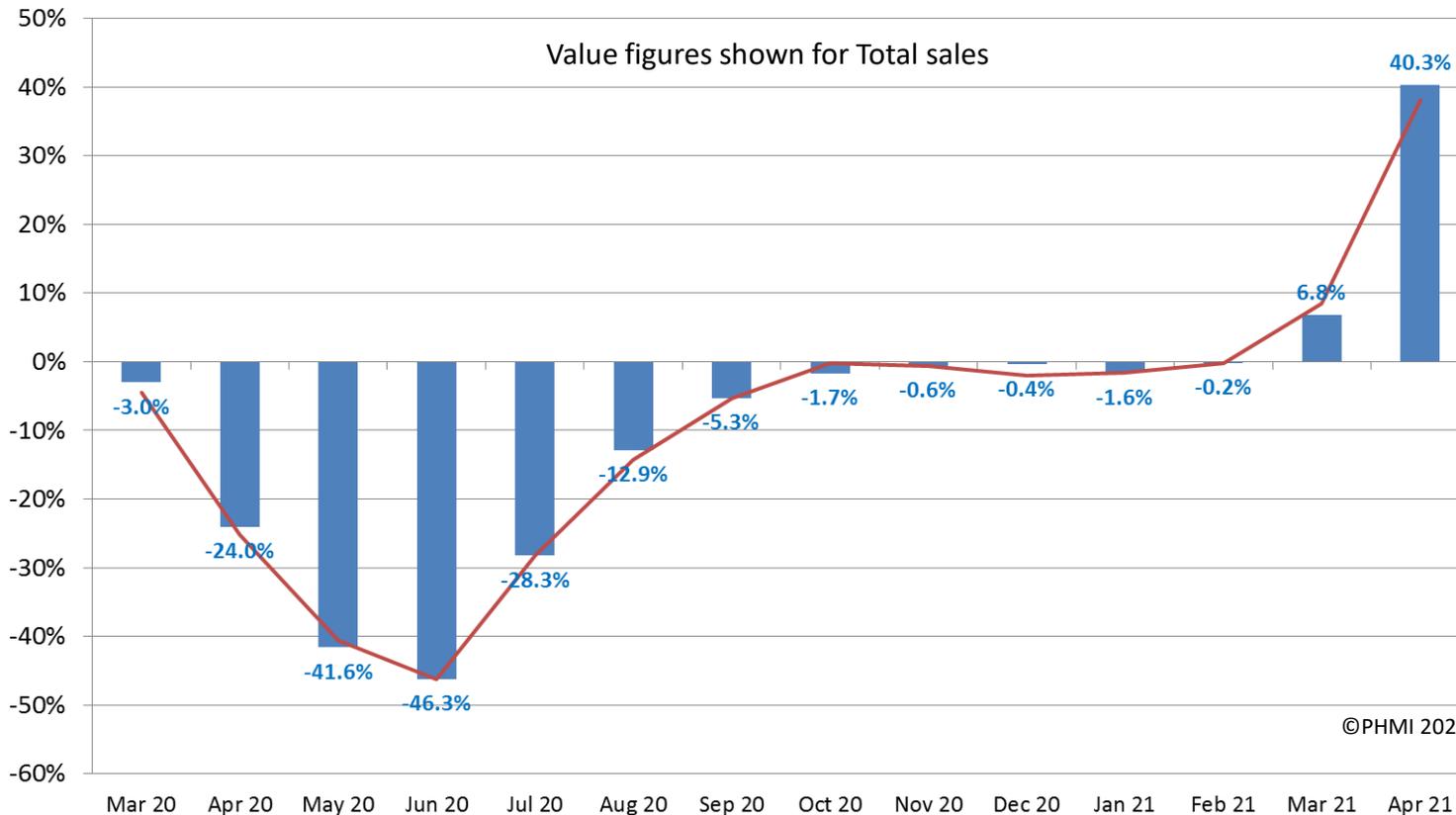
 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Apr 2021

Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted
for trading days*

Rolling 3 months: year on year

■ Total sales — Average sales a day



Eg. Apr 21 shows the three months Feb-Apr were 40.3% higher than the same three months last year.

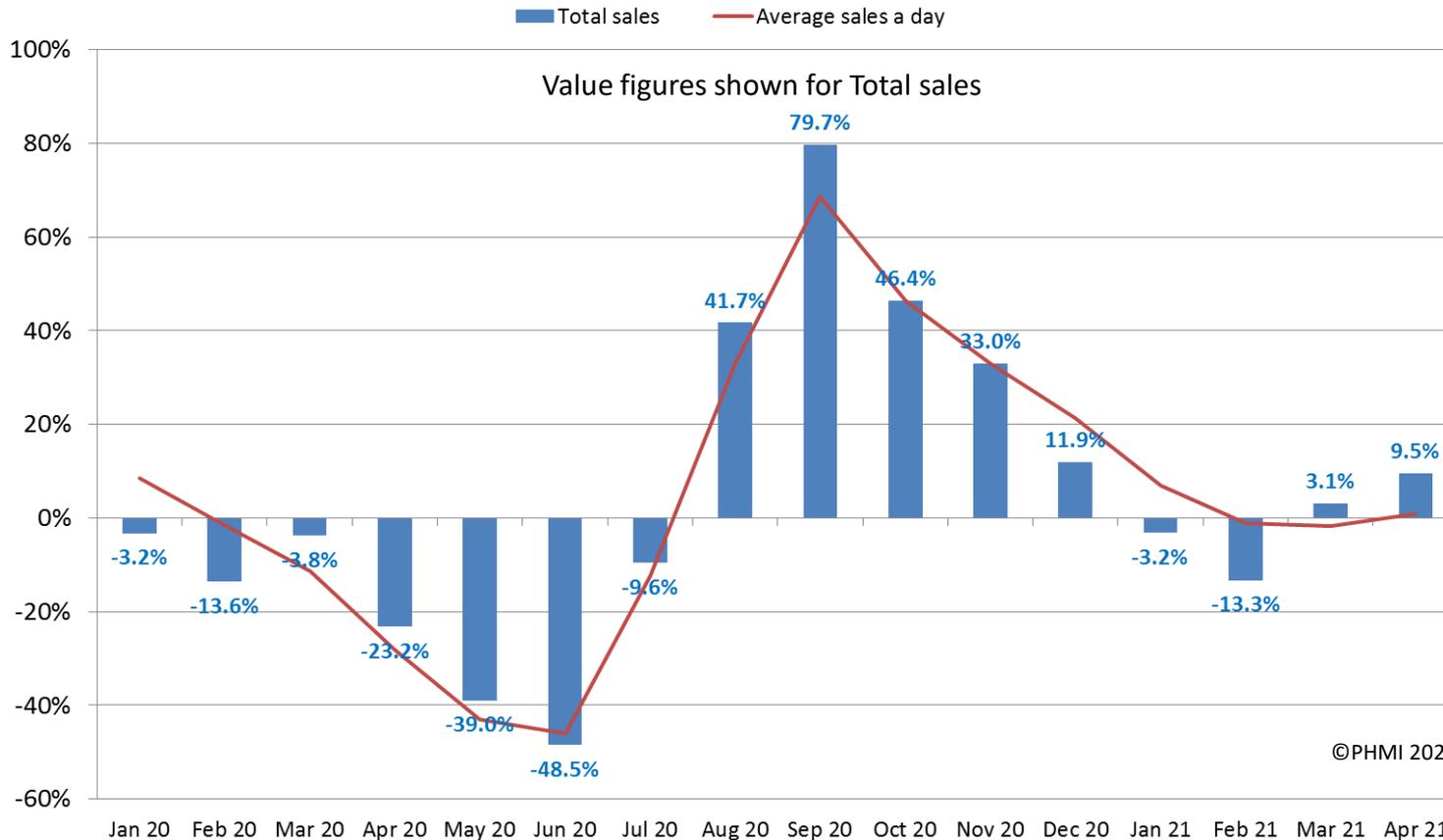
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted
for trading days*

Rolling 3 months v previous 3 months



Eg. Apr 21 shows the three months Feb-Apr were 9.5% higher than the three months Nov 20 to Jan 21

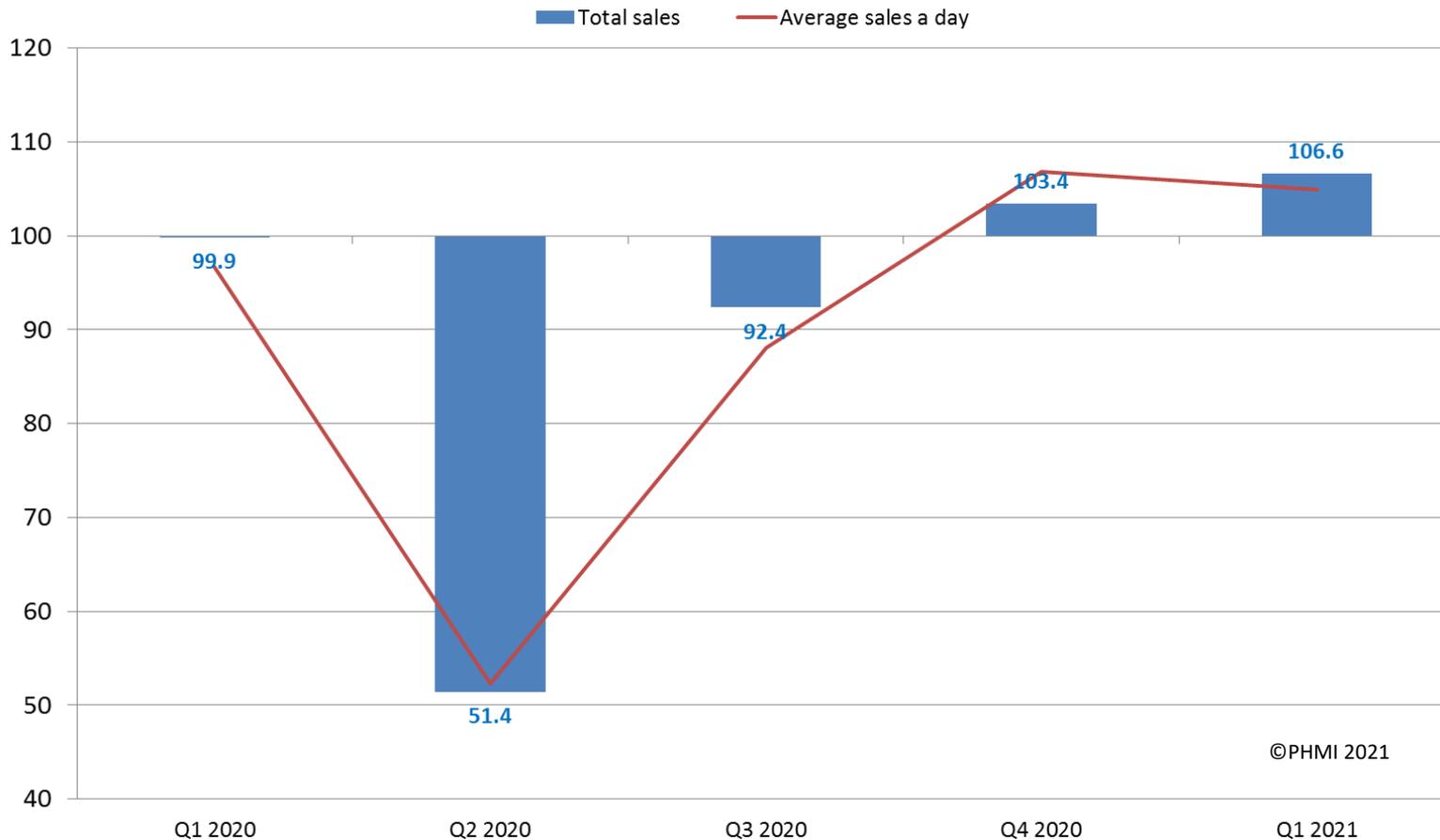
*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

Quarterly: Index

Adjusted and unadjusted for trading days

Indices: Q1 2020 to Q1 2021



Value figures
shown for Total
sales

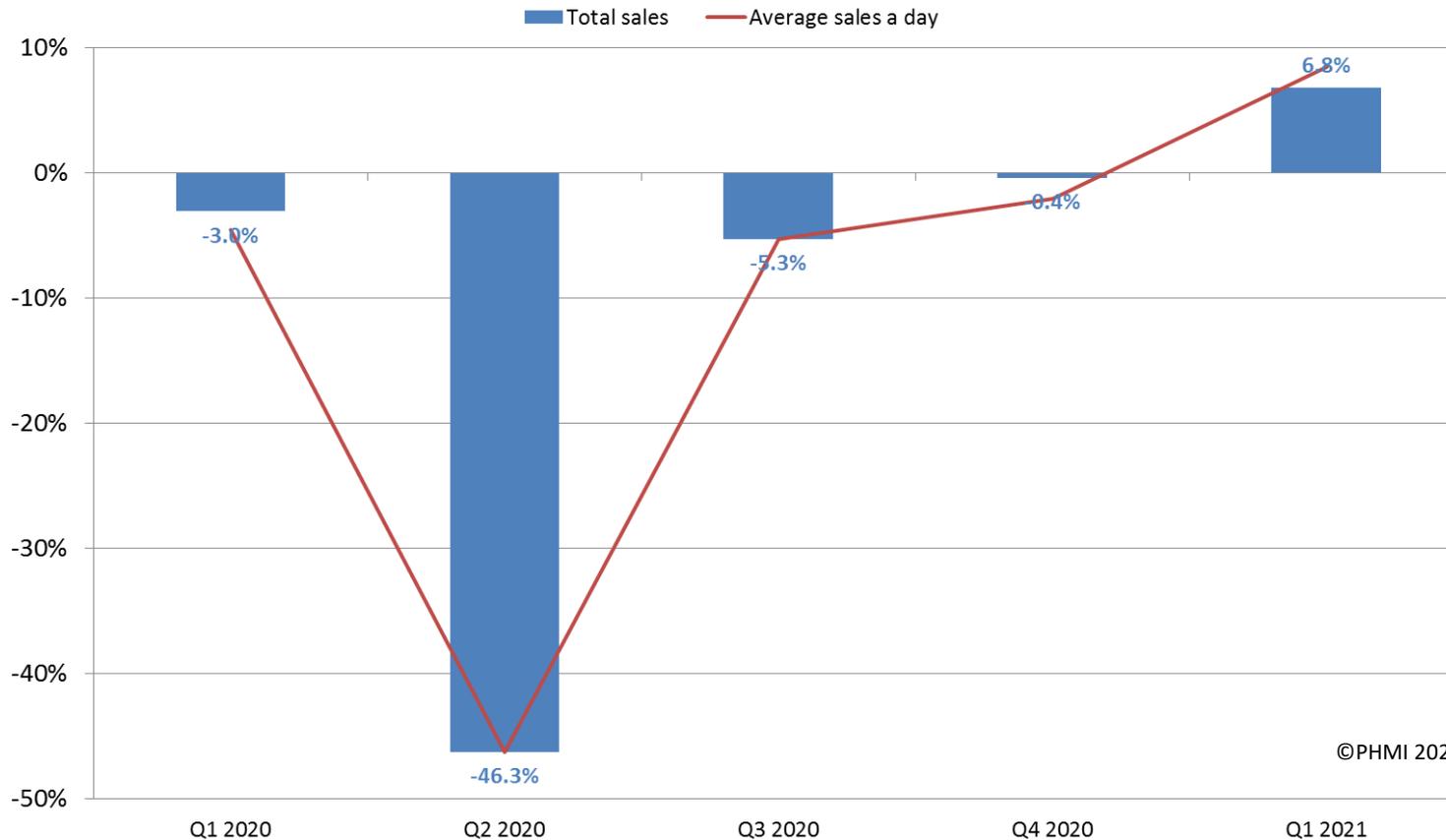
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 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Mar 2021

Quarterly: This Year v Last Year

Sales indices, adjusted and unadjusted
for trading days*

Quarter: year on year



Value figures
shown for Total
sales

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

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

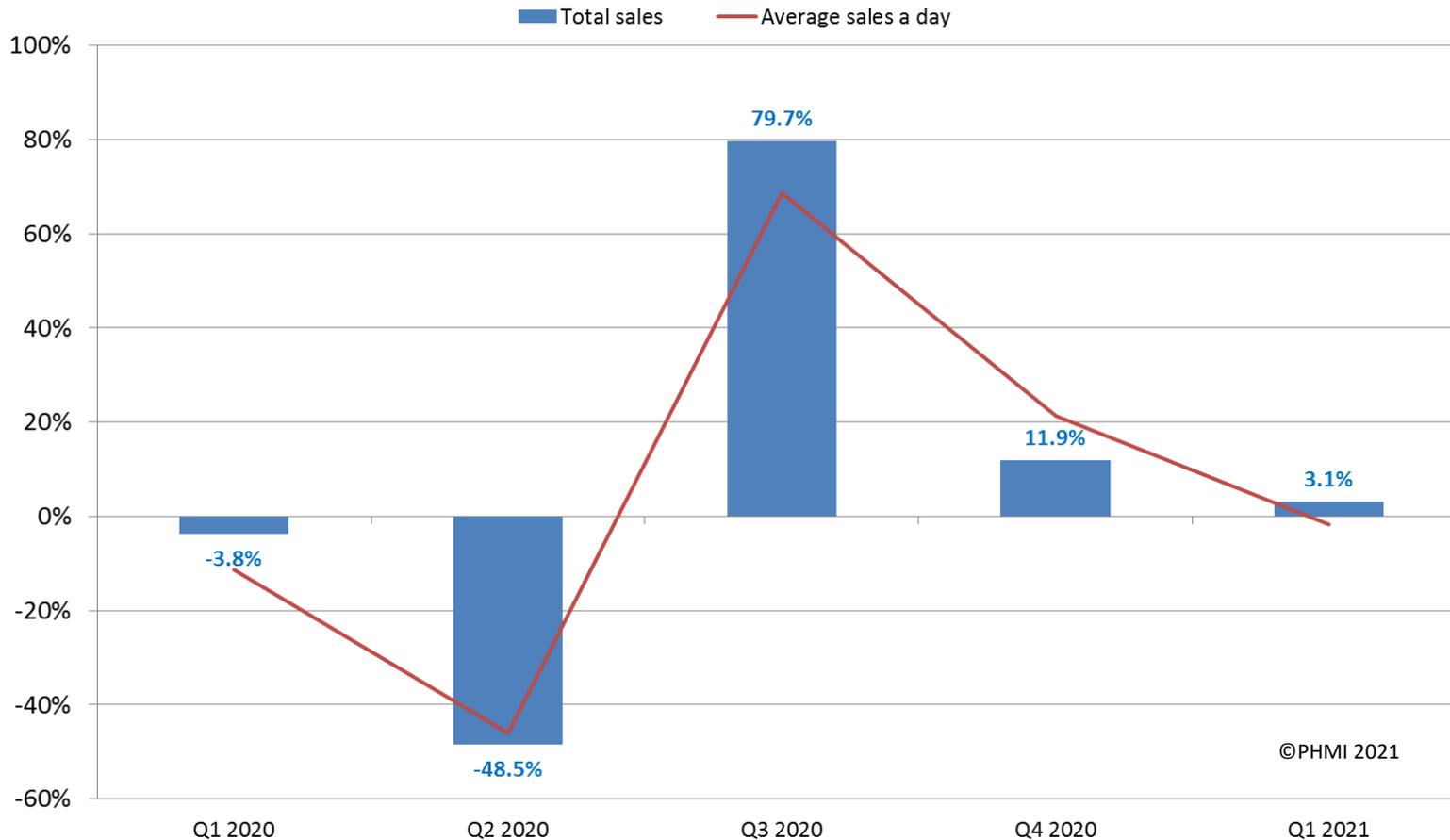
Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted
for trading days

Plumbing & Heating
Merchant Index



Quarter v previous quarter



Value figures
shown for Total
sales

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

PHMI Trading Days

Monthly

Index: 20.8

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

Quarterly

Index: 62.3

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

Half Year

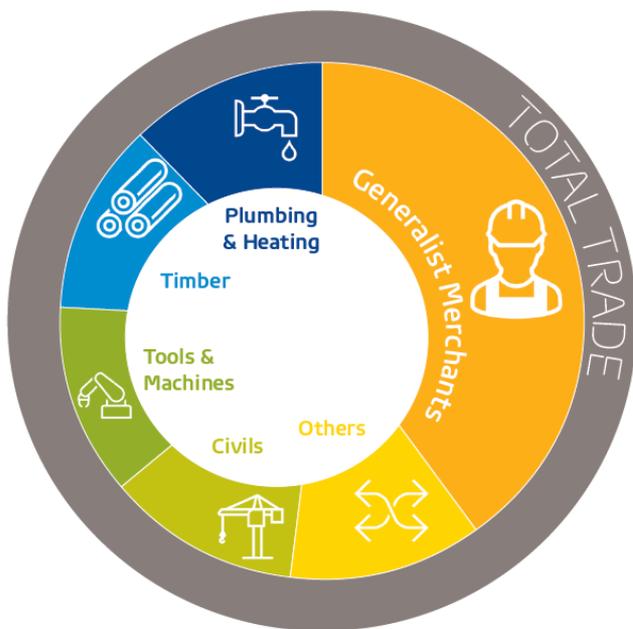
2020	
H1	H2
125	125
2021	
H1	H2

Full Year

2020
250
2021

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

Plumbing & Heating channel definition and merchants



Plumbing Specialists

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

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

Plumbing Merchants

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

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

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

Merchant partners include:



Plumbing Trade Supplies



Contacting PHMI

PHMI Experts

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



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Commercial Manager

tom@mra-marketing.com

+44 (0) 7392 081276



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

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“building **excellence**
in materials supply”



BMF Forecast Report & BMF Sales Indicators

BMF Forecast Report

Spring 2021 edition



Builders Merchants Industry Forecast Report

The BMF has released the seventh edition of its Builders Merchants Industry Forecast, covering 2021.

While Builders Merchants Building Index (BMBI) data, which is provided by GfK and is based on actual sales category performance, has enabled users to see which products and regions are currently growing, the forecast report takes this one stage further to meet the industry's need for accurate forecasting.

The BMF forecast model incorporates several lead indicators to signal future events that will impact our markets.

Using BMBI data coupled with advanced modelling techniques the BMF has developed a channel-specific forecasting model to show what is likely to happen in the next 12 months, making it possible for merchants and suppliers to forecast their customers' requirements more accurately.

The report is updated on a quarterly basis, with the Spring 2021 edition available now. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Richard Ellithorne on 024 7685 4980 or email: richard.ellithorne@bmf.org.uk



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in materials supply"

**Builders Merchants
Industry Forecast**
2021

Year in Review
Spring Edition
£250

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

Contact us

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