

“building **excellence**  
in materials supply”

Including  
**Plumbing & Heating  
Merchant Index**  
See page 55

# Builders Merchant Building Index



## Monthly report for July 2021

(Published 20 September 2021)

# 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, unadjusted and adjusted for trading day differences</a>	<a href="#">12</a>
<a href="#">July index chart, by category</a>	<a href="#">13</a>
<a href="#">Monthly year-on-year chart, unadjusted and adjusted for trading day differences</a>	<a href="#">14</a>
<a href="#">July year-on-year sales index chart, by category</a>	<a href="#">15</a>
<a href="#">July year-on-year average sales a day index chart, by category</a>	<a href="#">16</a>
<a href="#">July 2021 v July 2019 sales index chart, by category</a>	<a href="#">17</a>
<a href="#">July 2021 v July 2019 average sales a day index chart, by category</a>	<a href="#">18</a>
<a href="#">July v June sales index chart, by category</a>	<a href="#">19</a>
<a href="#">July v June average sales a day 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, unadjusted and adjusted for trading day differences</a>	<a href="#">22</a>
<a href="#">Quarter 2 index chart, by category</a>	<a href="#">23</a>

Click links to visit pages:	Page
<a href="#">Quarterly indices, by category</a>	<a href="#">24-26</a>
<a href="#">Quarter 2 year-on-year chart, unadjusted and adjusted for trading days</a>	<a href="#">27</a>
<a href="#">Quarter 2 year-on-year sales index chart, by category</a>	<a href="#">28</a>
<a href="#">Quarter 2 2021 v Quarter 2 2019 sales index chart, by category</a>	<a href="#">29</a>
<a href="#">Quarter 2 v Quarter 1 sales index chart, by category</a>	<a href="#">30</a>
<a href="#">Quarter 2 v Quarter 1 average sales a day index chart, by category</a>	<a href="#">31</a>
<b>Other periods:</b>	
<a href="#">Last 3 months year-on-year sales index chart, by category</a>	<a href="#">32</a>
<a href="#">Last 3 months year-on-year average sales a day index chart, by category</a>	<a href="#">33</a>
<a href="#">Last 3 months v 2019 sales index chart, by category</a>	<a href="#">34</a>
<a href="#">Last 3 months v 2019 average sales a day 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 average sales a day 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 average sales a day 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 average sales a day index chart</a>	<a href="#">41</a>
<a href="#">Last 12 months index chart, by category</a>	<a href="#">42</a>
<a href="#">Last 12 months average sales a day index chart, by category</a>	<a href="#">43</a>

Continued over the page...

# Contents - 2

Continued: click links below to visit pages

Click links to visit pages:	Page
<a href="#">Last 12 months BMBI index chart, August 2016 to July 2021</a>	<a href="#">44</a>
<b>Monthly Category Charts:</b>	
<a href="#">Timber &amp; Joinery Products</a>	<a href="#">45</a>
<a href="#">Heavy Building Materials</a>	<a href="#">45</a>
<a href="#">Decorating</a>	<a href="#">46</a>
<a href="#">Tools</a>	<a href="#">46</a>
<a href="#">Workwear &amp; Safetywear</a>	<a href="#">47</a>
<a href="#">Ironmongery</a>	<a href="#">47</a>
<a href="#">Landscaping</a>	<a href="#">48</a>
<a href="#">Plumbing Heating &amp; Electrical</a>	<a href="#">48</a>
<a href="#">Renewables &amp; Water Saving</a>	<a href="#">49</a>
<a href="#">Kitchens &amp; Bathrooms</a>	<a href="#">49</a>
<a href="#">Miscellaneous</a>	<a href="#">50</a>
<a href="#">Services</a>	<a href="#">50</a>
<a href="#">Trading days</a>	<a href="#">51</a>
<a href="#">Methodology</a>	<a href="#">52 – 54</a>
<b>Plumbing &amp; Heating Merchant Index:</b>	
<a href="#">Plumbing &amp; Heating Merchant Index</a>	<a href="#">55</a>
<a href="#">Introduction</a>	<a href="#">56</a>
<a href="#">Overview</a>	<a href="#">57</a>

Click links to visit pages:	Page
<a href="#">Month and 3-month index table</a>	<a href="#">58</a>
<a href="#">Monthly index</a>	<a href="#">59</a>
<a href="#">Month, year-on-year</a>	<a href="#">60</a>
<a href="#">Month v 2019</a>	<a href="#">61</a>
<a href="#">Month on month</a>	<a href="#">62</a>
<a href="#">Rolling 3 months, year-on-year</a>	<a href="#">63</a>
<a href="#">Rolling 3 months v previous 3 months</a>	<a href="#">64</a>
<a href="#">Quarterly index</a>	<a href="#">65</a>
<a href="#">Quarter, year-on-year</a>	<a href="#">66</a>
<a href="#">Quarter on quarter</a>	<a href="#">67</a>
<a href="#">Year to date, year-on-year</a>	<a href="#">68</a>
<a href="#">Year to date v 2019</a>	<a href="#">69</a>
<a href="#">Last 12 months, year-on-year</a>	<a href="#">70</a>
<a href="#">Trading days</a>	<a href="#">71</a>
<a href="#">Plumbing &amp; Heating channel definition and merchants</a>	<a href="#">72</a>
<a href="#">PHMI Contacts</a>	<a href="#">73</a>
<a href="#">BMF Forecast Report</a>	<a href="#">74 – 75</a>
<b>BMBI Contacts</b>	<a href="#">76</a>

# 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, 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.

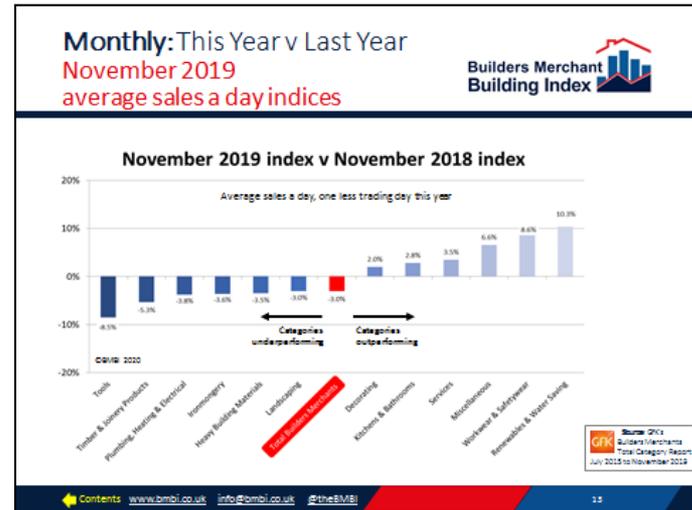
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

## 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. 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, the 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.

## Strong Timber & Joinery Products sector fuels growth compared with 2020 and 2019

Total Builders Merchants July 2021 value sales were up 14.5% compared with the same month last year, with two less trading days this year. Timber & Joinery Products (+42.4%) did best and the category achieved its highest-ever monthly BMBI sales. Other categories grew more slowly than merchants overall. Kitchens & Bathrooms (+13.9%) was the next-strongest performer, achieving its highest sales in the last 12 months. Plumbing Heating & Electrical (+10.4%), Heavy Building Materials (+8.9%) and Decorating (+2.3%) also sold more. Three categories sold less this year: Tools (-1.5%), Landscaping (-1.6%) and Workwear & Safetywear (-29.5%) – the latter two having seen significant Covid-related growth this time last year. Overall average sales a day were 25.5% higher than in July 2020.

### July 2021 v July 2019

Compared with two years ago, Total Merchants sales were up 13.1% in July 2021, with two less trading days this year. However this growth was primarily driven by the strength of two categories: Timber & Joinery Products (+44.6%) and Landscaping (+23.4%). Heavy Building Materials (+4.5%) grew more slowly. Most of the remaining categories sold less this year, including Kitchens & Bathrooms (-1.6%), Decorating (-6.8%), Plumbing Heating and Electrical (-7.1%) and Workwear & Safetywear (-14.5%) the weakest category. Average sales a day were 23.8% higher in July 2021.

### Month-on-Month

Total July sales were 3.8% lower than June, with one less trading day this month. Kitchens & Bathrooms (+1.1%) was strongest, along with minor categories Miscellaneous and Services, also up 1.1%. Timber & Joinery Products (+0.1%) was flat. All remaining categories sold less, including Heavy Building Materials (-4.2%), Plumbing Heating & Electrical (-8.1%) and Landscaping (-12.9%). Workwear & Safetywear (-17.0%) was weakest. Average sales a day were up 0.8%.

### Last three months, year on year

Total sales in May to July 2021 were 35.4% up on a Covid-affected period last year, with two less trading days this year. All categories sold more. Timber & Joinery Products (+64.8%) led the field, followed by Kitchens & Bathrooms (+50.0%). Renewables (+48.8%), Plumbing Heating & Electrical (+46.5%) and Tools (+38.7%) also out-performed merchants generally. Ironmongery (+32.7%), Decorating (+29.3%) and Heavy Building Materials (+27.4%) grew more slowly. Workwear & Safetywear (+1.4%) did least well. Average sales a day increased by 39.8%.

### Last 3 months v 2019

Total Builders Merchants sales in May to July 2021 were 17.3% higher than in May to July 2019, with two less trading days this year. Two categories did particularly well: Timber & Joinery Products (+43.7%) and Landscaping (+35.0%). Five categories grew more slowly, including Heavy Building Materials (+8.6%), Ironmongery (+2.8%) and Kitchens & Bathrooms (+1.3%). The remaining categories sold less, with Miscellaneous the weakest (-5.8%). Average sales a day were 21.0% higher.

**Total Builders  
Merchants July 2021  
value sales were up  
14.5% compared  
with the same month  
last year. Timber &  
Joinery Products  
(+42.4%) did best  
and the category  
achieved its highest-  
ever monthly BMBI  
sales.**

Overview continues on the next page...

# Overview - 2

...Overview continued from the previous page:

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

With one less trading day, Total sales in May to July were 9.1% higher than in February to April. Timber & Joinery Products (+19.1%) and Landscaping (+11.7%) out-performed merchants overall. Heavy Building Materials (+7.2%), Kitchens & Bathrooms (+6.3%) and three more categories grew more slowly. Five categories sold less in May to July, including Plumbing Heating & Electrical (-6.9%). Workwear & Safetywear (-9.9%) was weakest. Overall average sales a day were 10.9% higher than in February to April.

## **Year to date**

Total Merchants sales January to July 2021, with three less trading days, were up 42.4% compared with Covid-affected January to July 2020. Timber & Joinery Products (+67.7) was the top-performer, followed by Tools (+47.0%) and Landscaping (+45.1%). Other categories grew more slowly, including Kitchens & Bathrooms (+36.7%) and Heavy Building Materials (+34.4%). Workwear & Safetywear (+5.0%) was the weakest. Average sales a day were 45.4% higher.

## **Year to date v 2019**

Looking back two years, sales in the seven months to July 2021 were up 13.4% on January to July 2019, with two less trading days this year. Landscaping (+38.7%) did best, with Timber & Joinery Products (+31.4%) close behind. Heavy Building Materials (+6.4%) and Workwear & Safetywear (+6.3%) were among five categories growing more slowly. Four categories sold less than two years ago, with Decorating (-2.6%) weakest. Overall average sales a day were 15.0% higher this year.

## **MAT**

Total Builders Merchants sales in the 12 months August 2020 to July 2021 were 25.2% higher than in the same 12 months a year earlier, with two less trading days in the most recent period. Again Timber & Joinery Products (+41.1%) and Landscaping (+37.1%) dominated. All other categories sold more than in 2019, with Tools (+22.6%), Heavy Building Materials (+20.2%) and Ironmongery (+17.6%) the next-strongest. Workwear & Safetywear (+2.0%) had the lowest growth. Average sales a day were 26.2% higher.

## **Index**

July's BMBI index was 151.1, helped by strong performances from Landscaping (204.8) and Timber & Joinery Products (199.8). Seven other categories recorded indices exceeding 100, including Heavy Building Materials (136.8), Ironmongery (129.2) and Kitchens & Bathrooms (126.5). Tools (97.6), Workwear & Safetywear (92.8) and Renewables (72.1) were the weakest.

Sales in the seven months to July 2021 were up 13.4% on January to July 2019. Landscaping (+38.7%) did best, with Timber & Joinery Products (+31.4%) close behind.

# 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 Q2 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: Q2 2021 Report](#)

### Expert for Bricks & Roof Tiles:



**Kevin Tolson,**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q2 2021 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q2 2021 Report](#)

### Expert for Civils & Green Infrastructure:



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

[Read latest Comment: Q2 2021 Report](#)

### Expert for Lead:



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

[Read latest Comment: Q2 2021 Report](#)

### Expert for Wood-Based Panels:



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

[Read latest Comment: Q2 2021 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q2 2021 Report](#)

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



No.1 for choice • No.1 for colour

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

[Read latest Comment: Q2 2021 Report](#)

### Expert for Shower Enclosures and Showering:



**Mick Evans**  
Operations Director  
Lakes

[Read latest Comment: Q2 2021 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q2 2021 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q2 2021 Report](#)

### Expert for Paint:



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

[Read latest Comment: Q2 2021 Report](#)

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



**Andy Scothern**  
Managing Director  
eCommonSense

[Read latest Comment: Q2 2021 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q2 2021 Report](#)

### Expert for Adhesives & Sealants:



**Mathew Whitehouse**  
Marketing Director  
Bostik UK

[Read latest Comment: Q2 2021 Report](#)

# Monthly: Index and Categories

July 2020\* – July 2021

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



		2020						2021						
MONTHLY SALES VALUE INDEX	Index	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July
<b>Total Builders Merchants</b>	<b>100</b>	<b>131.9</b>	<b>113.3</b>	<b>128.7</b>	<b>126.4</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>
Timber & Joinery Products	100	140.3	120.6	139.3	141.1	139.9	95.2	120.0	128.8	175.7	176.3	173.2	199.6	199.8
Heavy Building Materials	100	125.6	108.6	125.4	122.8	119.4	78.1	95.9	102.0	141.3	137.4	128.6	142.8	136.8
Decorating	100	112.4	100.1	113.1	111.7	110.5	76.2	85.8	95.7	121.7	113.2	106.5	116.7	115.0
Tools	100	99.0	85.8	98.5	101.0	100.0	70.9	84.4	93.7	120.8	110.7	98.2	100.2	97.6
Workwear & Safetywear	100	131.7	98.4	111.1	125.2	126.7	87.9	122.3	111.3	118.2	104.0	95.8	111.8	92.8
Ironmongery	100	128.7	113.6	127.3	127.3	122.9	87.8	103.1	111.5	143.1	137.4	127.0	137.0	129.2
Landscaping	100	208.2	157.2	161.0	135.6	122.8	78.0	90.1	111.9	222.5	257.0	220.5	235.1	204.8
Plumbing, Heating & Electrical	100	103.1	95.3	115.4	126.0	125.9	96.1	111.3	120.3	137.1	119.2	112.9	123.7	113.7
Renewables & Water Saving	100	69.3	58.2	71.9	67.2	70.3	50.4	62.6	62.3	85.9	78.8	72.7	80.1	72.1
Kitchens & Bathrooms	100	111.1	106.3	117.3	119.3	122.7	87.4	94.4	107.4	120.7	113.5	111.5	125.1	126.5
Miscellaneous	100	112.4	98.2	122.3	120.8	118.9	86.1	109.4	107.1	131.2	126.2	111.2	120.3	121.6
Services	100	119.4	109.2	119.2	117.5	115.4	89.0	93.5	103.3	134.5	128.8	123.5	131.4	132.8

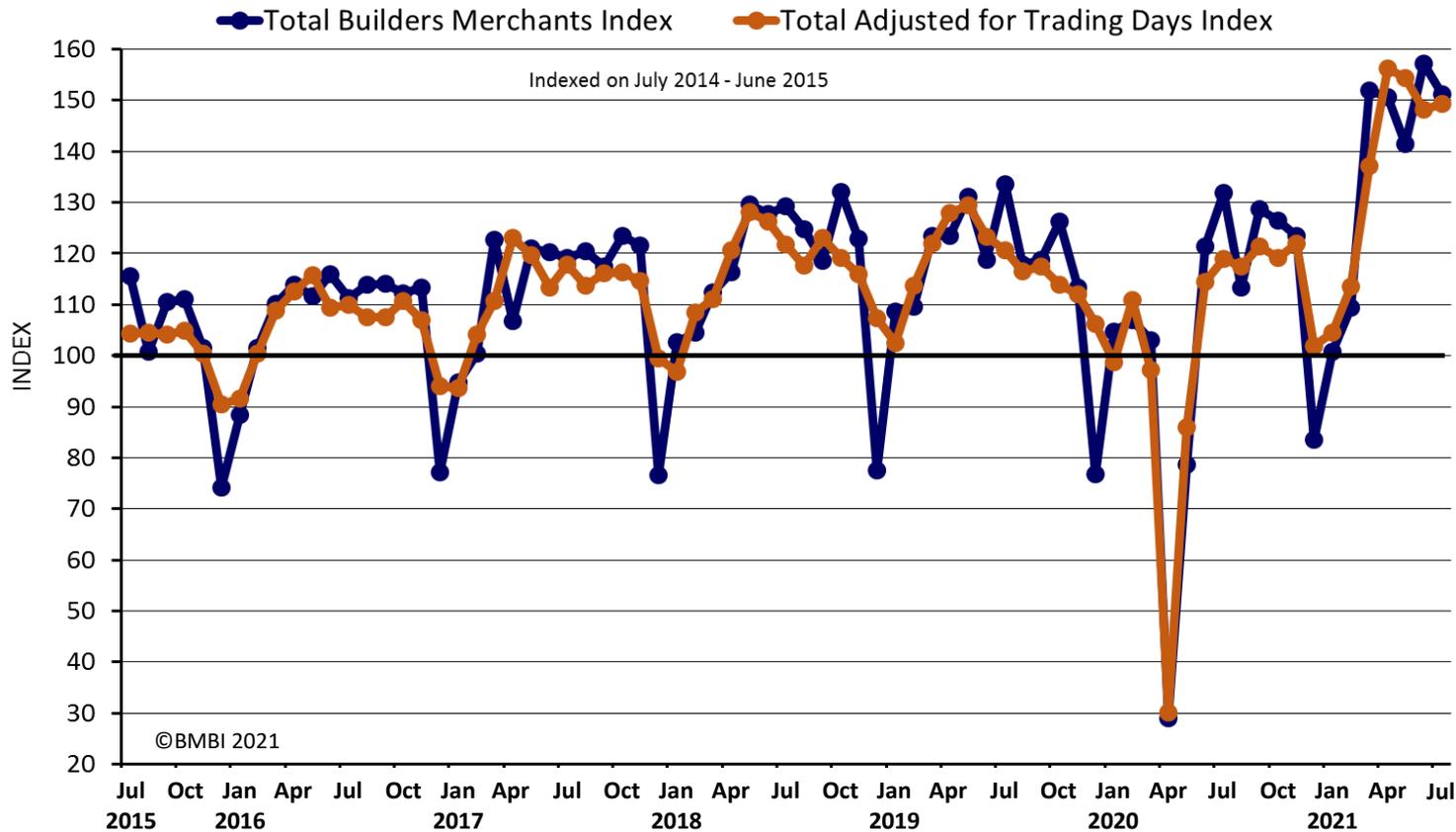
\*Click the web link below to see the complete series of indices from July 2015.


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

# Monthly: Index

Adjusted and unadjusted for trading days

## Total Builders Merchants Index v Total Adjusted for Trading Days Index

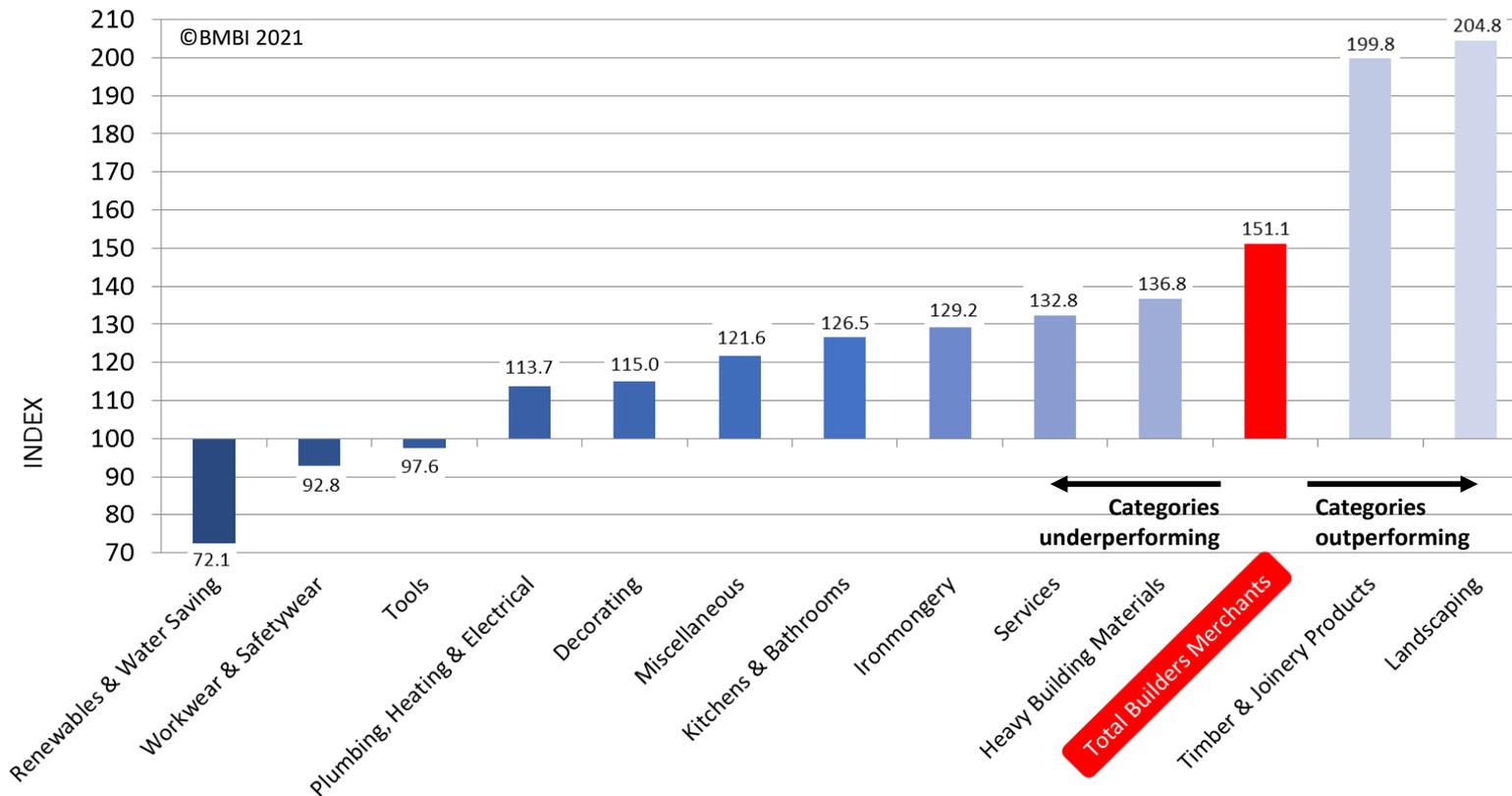


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Monthly: Index and Categories

July 2021 index

## July 2021 Index



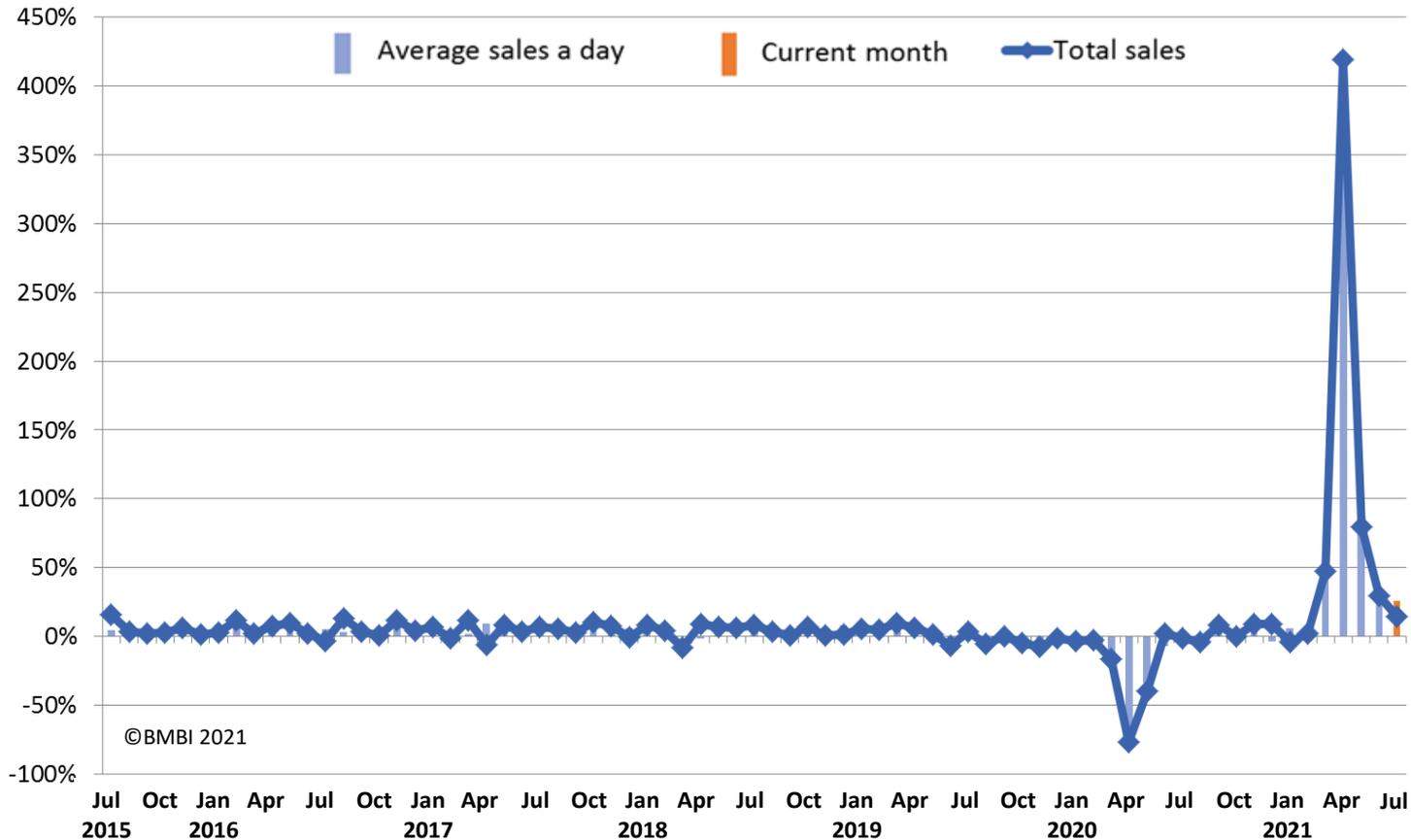
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days



## Monthly: Year on Year



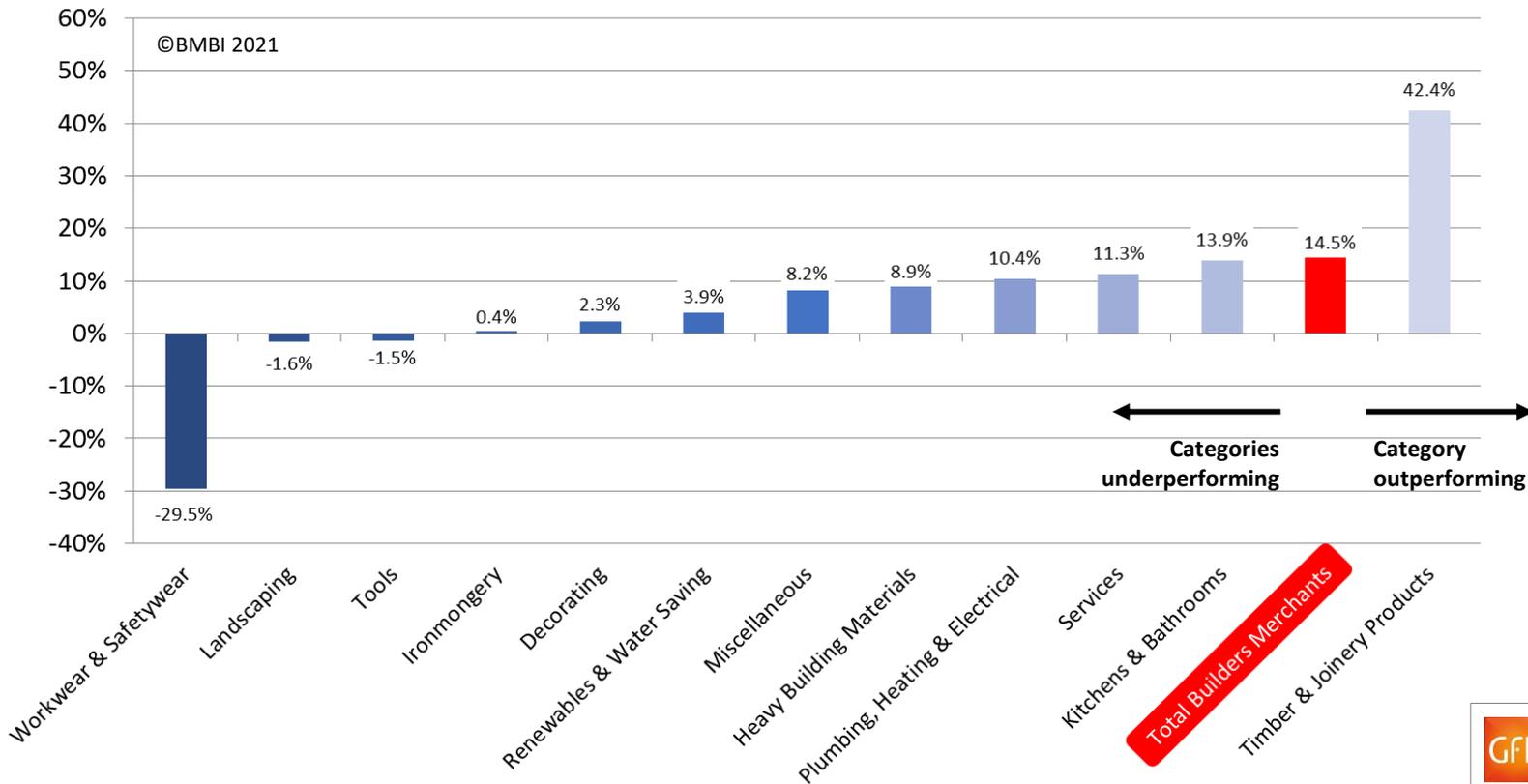
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Monthly: This Year v Last Year

July 2021 sales indices



## July 2021 index v July 2020 index



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

# Monthly: This Year v Last Year

July 2021 average sales a day indices



## July 2021 index v July 2020 index

Average sales a day

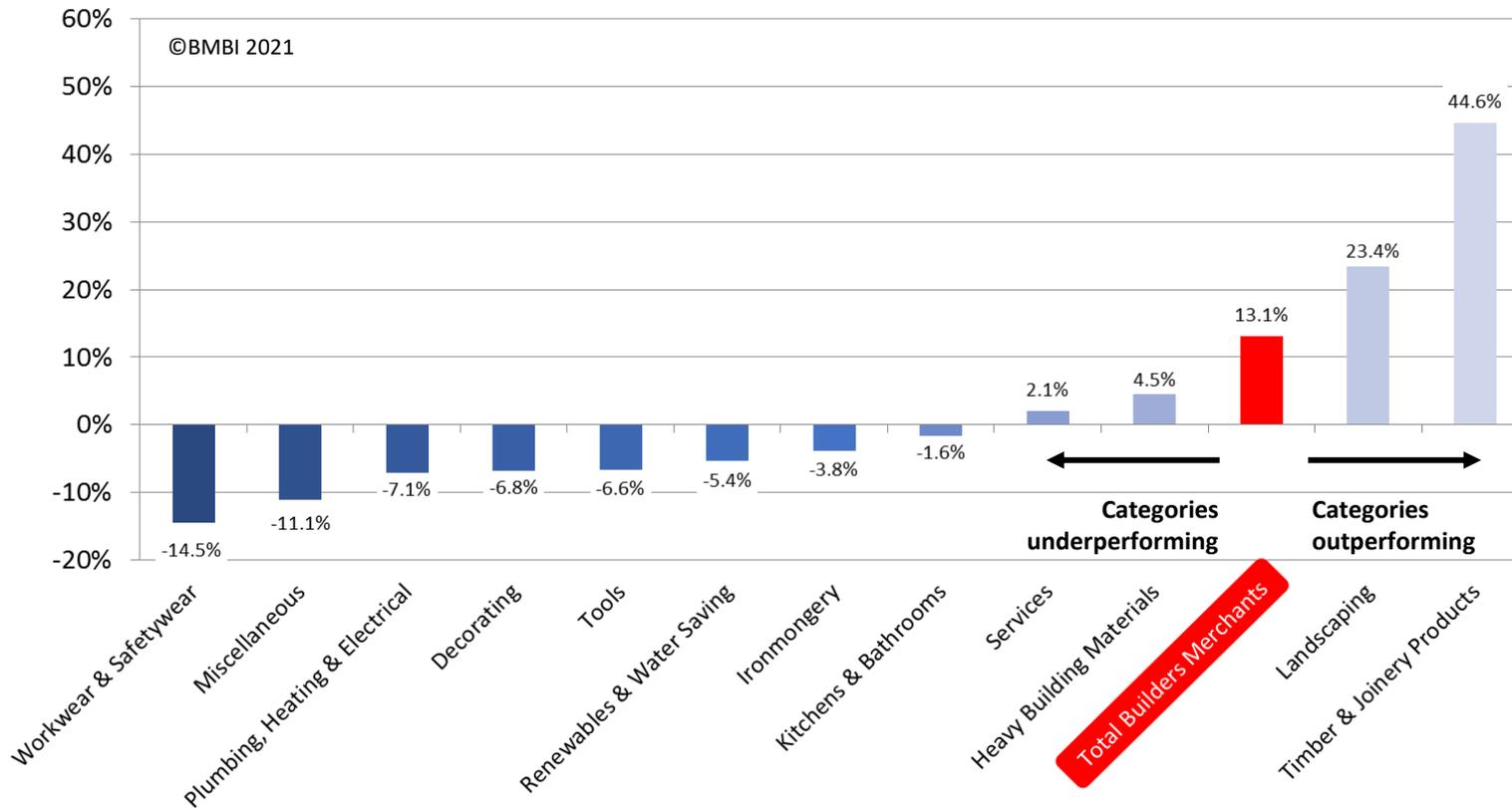


Source: GfK's Builders Merchants Total Category Report July 2015 to July 2021

# Monthly: This year v 2019

July 2021 2-year sales indices

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



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

# Monthly: This year v 2019

## July 2021 2-year average sales a day indices

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



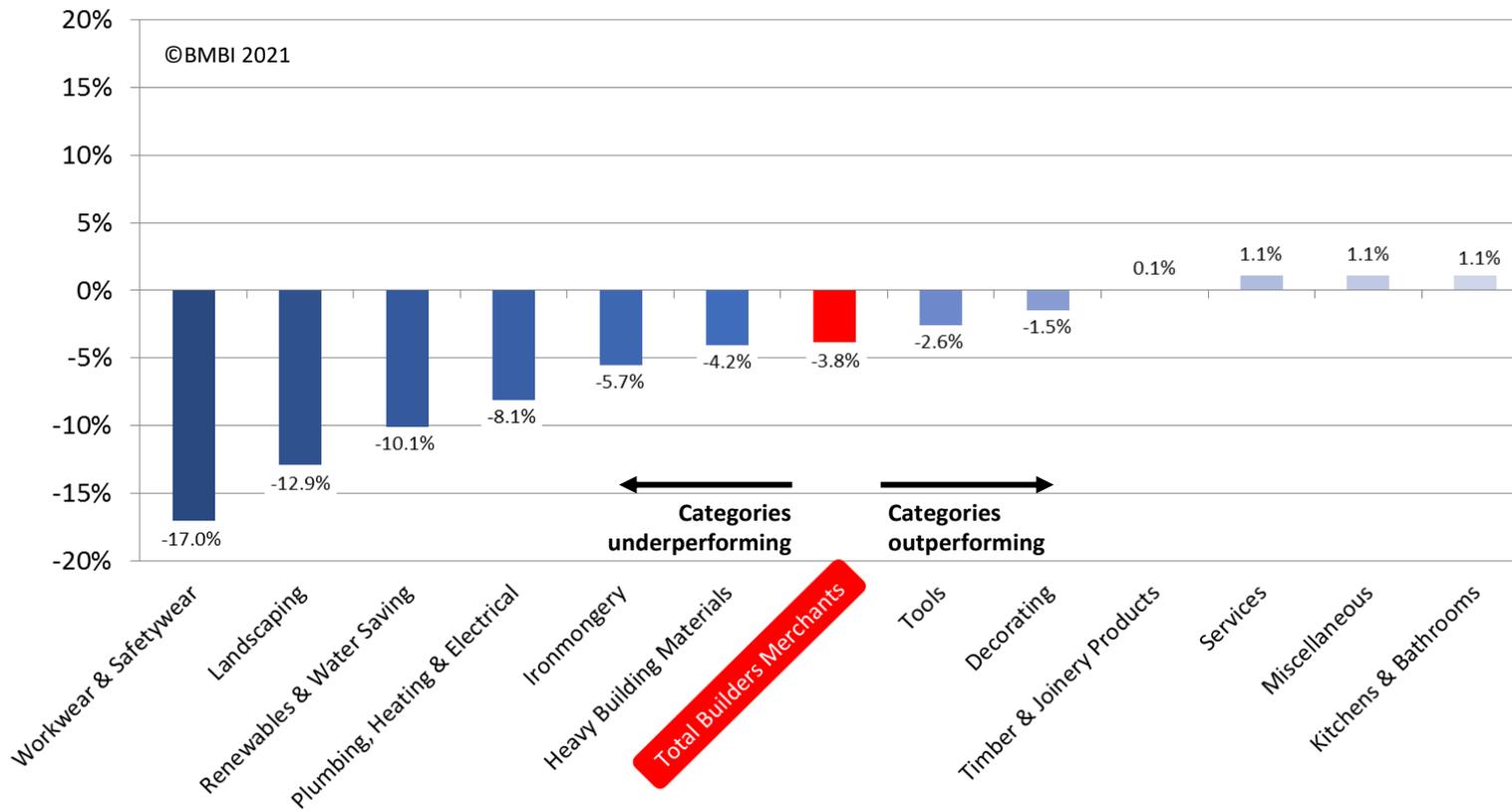
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Monthly: This Month v Last Month

July 2021 sales indices



## July 2021 Index v June 2021 Index



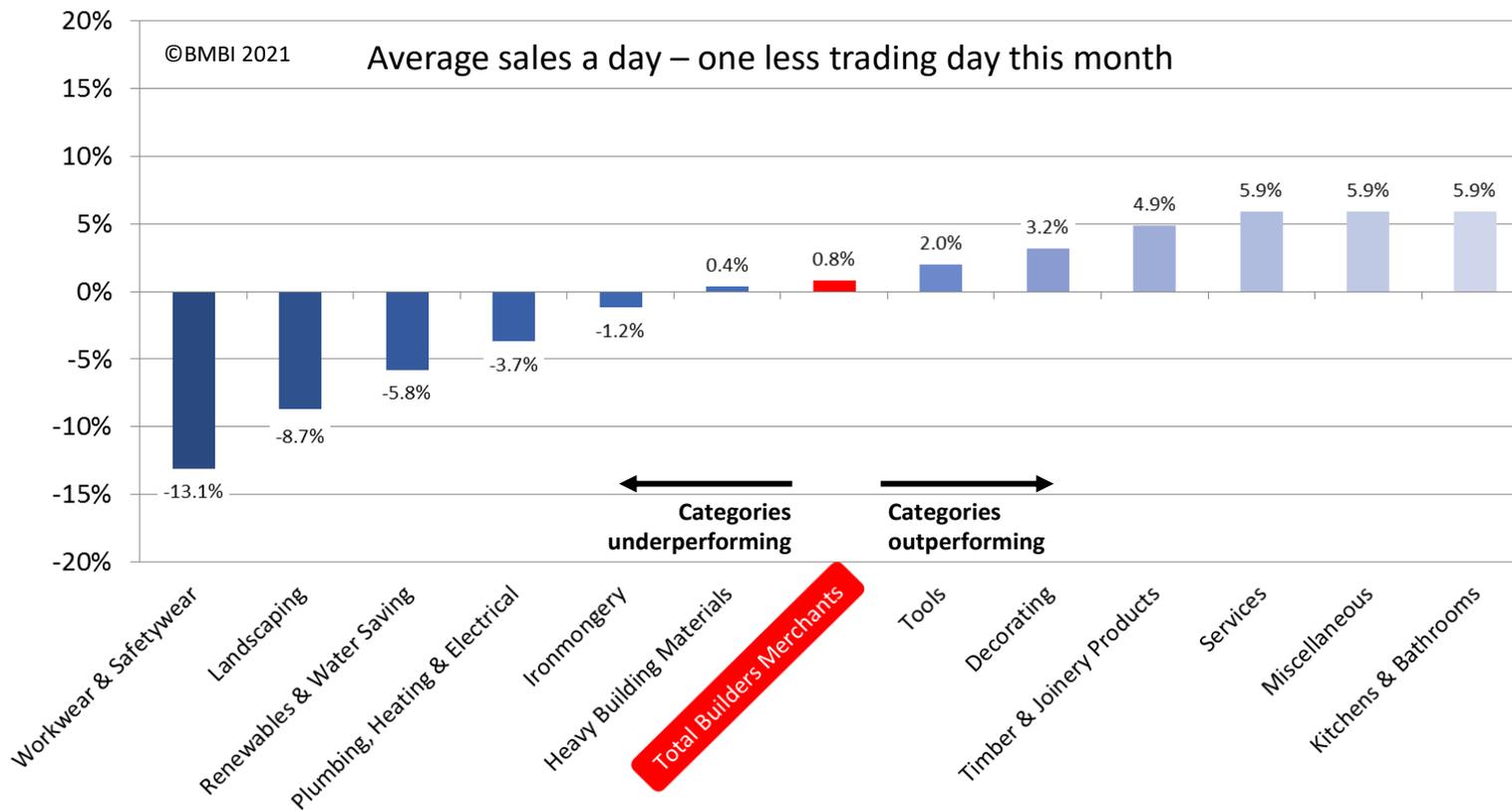
Source: GfK's Builders Merchants Total Category Report July 2015 to July 2021

# Monthly: This Month v Last Month

July 2021 average sales a day indices



## July 2021 Index v June 2021 Index



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

# Quarterly: Index and Categories

Quarter 2 2020\* to Quarter 2 2021

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021
<b>Total Builders Merchants</b>	<b>100</b>	<b>76.4</b>	<b>124.6</b>	<b>111.1</b>	<b>120.7</b>	<b>149.7</b>
Timber & Joinery Products	100	78.0	133.4	125.4	141.5	183.0
Heavy Building Materials	100	75.1	119.9	106.8	113.1	136.3
Decorating	100	56.3	108.5	99.5	101.1	112.2
Tools	100	41.0	94.4	90.7	99.6	103.0
Workwear & Safetywear	100	67.5	113.7	113.3	117.3	103.9
Ironmongery	100	65.0	123.2	112.6	119.3	133.8
Landscaping	100	138.8	175.5	112.1	141.5	237.5
Plumbing, Heating & Electrical	100	53.9	104.6	116.0	122.9	118.6
Renewables & Water Saving	100	31.5	66.4	62.6	70.3	77.2
Kitchens & Bathrooms	100	48.4	111.6	109.8	107.5	116.7
Miscellaneous	100	63.3	111.0	108.6	115.9	119.2
Services	100	72.8	115.9	107.3	110.4	127.9

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

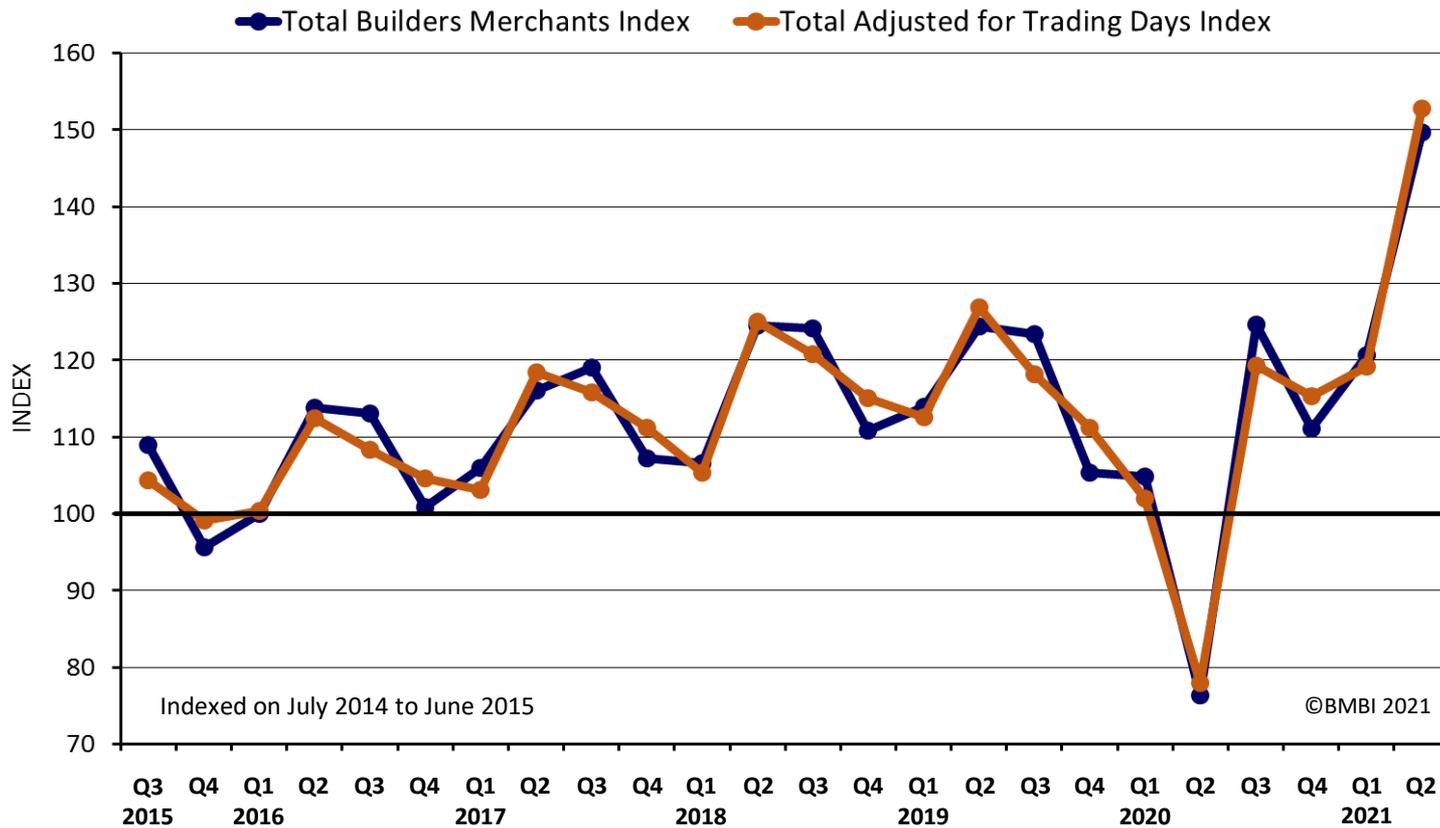
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2021

# Quarterly: Index

Adjusted and unadjusted for trading days



## Total Builders Merchants Index v Total Adjusted for Trading Days Index



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

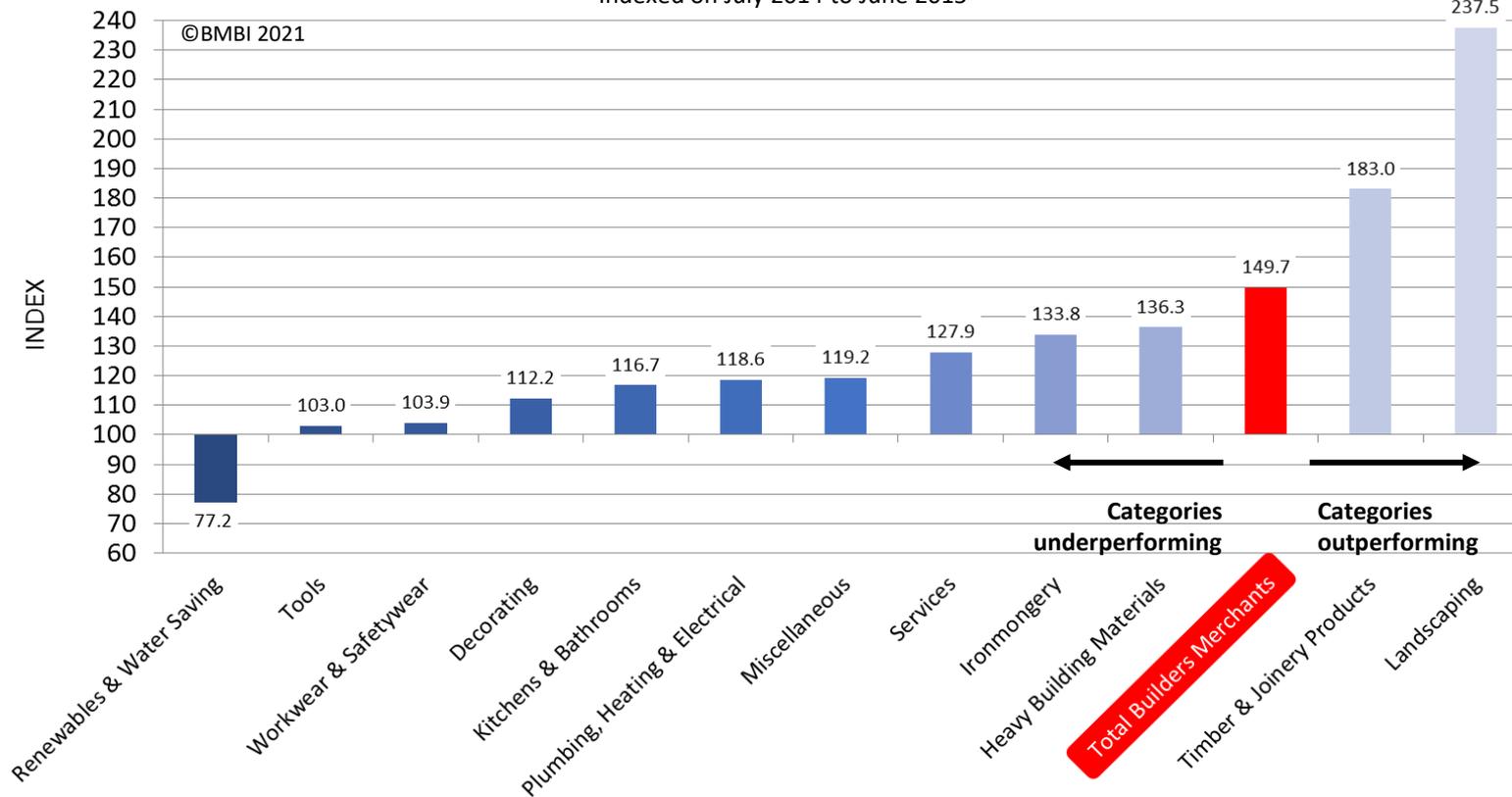
# Quarterly: Index and Categories

Q2 2021 index



## Quarter 2 2021

Indexed on July 2014 to June 2015



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

# Quarterly: Index and Categories - 1

Quarterly indices



## Quarterly Indices Q3 2015 to Q2 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



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

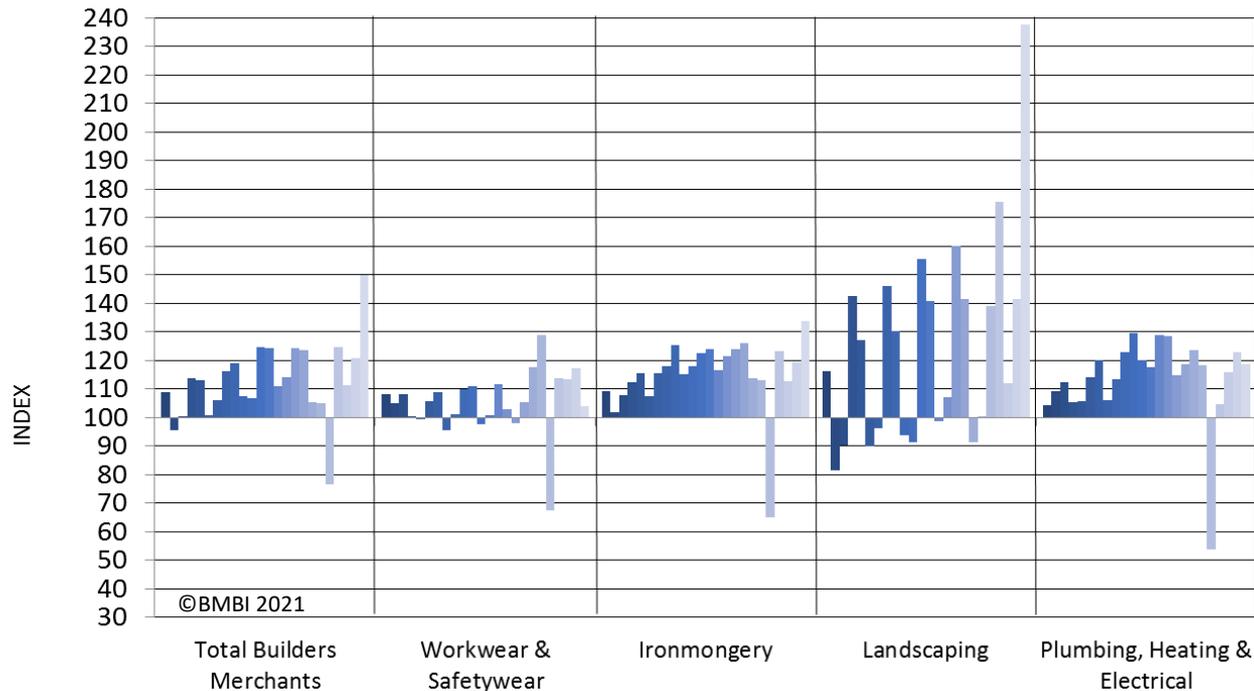
# Quarterly: Index and Categories - 2

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

## Quarterly Indices Q3 2015 to Q2 2021



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

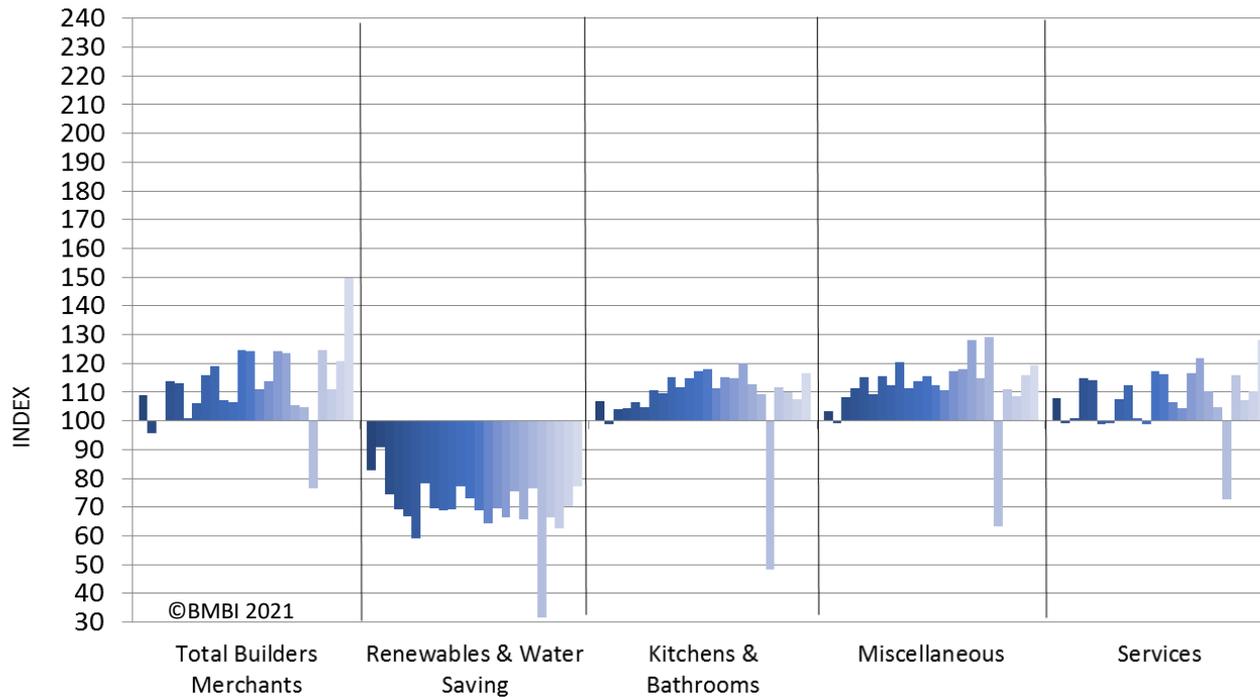
# Quarterly: Index and Categories - 3

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

## Quarterly Indices Q3 2015 to Q2 2021

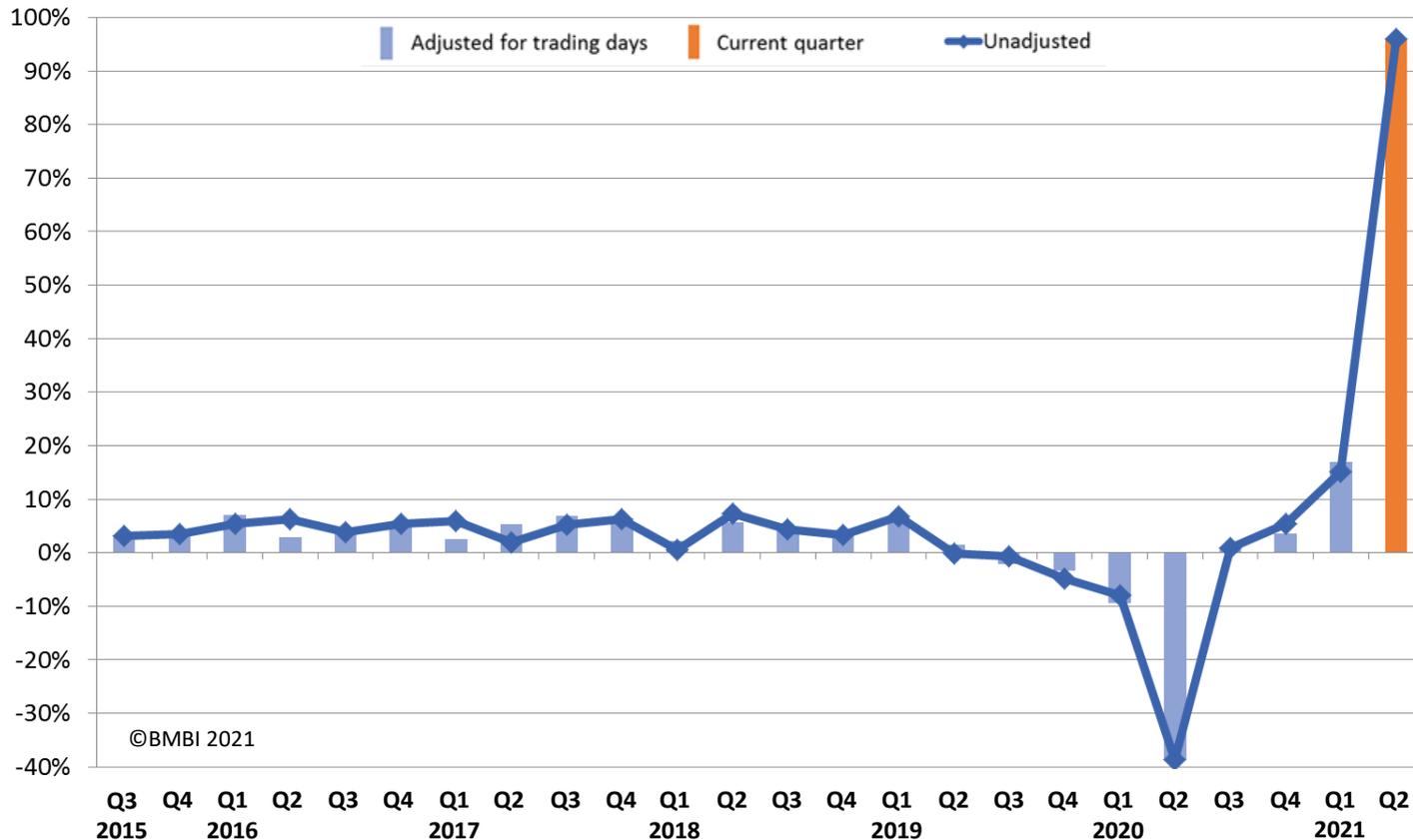


Source: GfK's Builders Merchants Total Category Report July 2015 to June 2021

# Quarterly: Sales Indices

Adjusted and unadjusted for trading days

## Quarterly Indices: Year on Year



©BMBI 2021

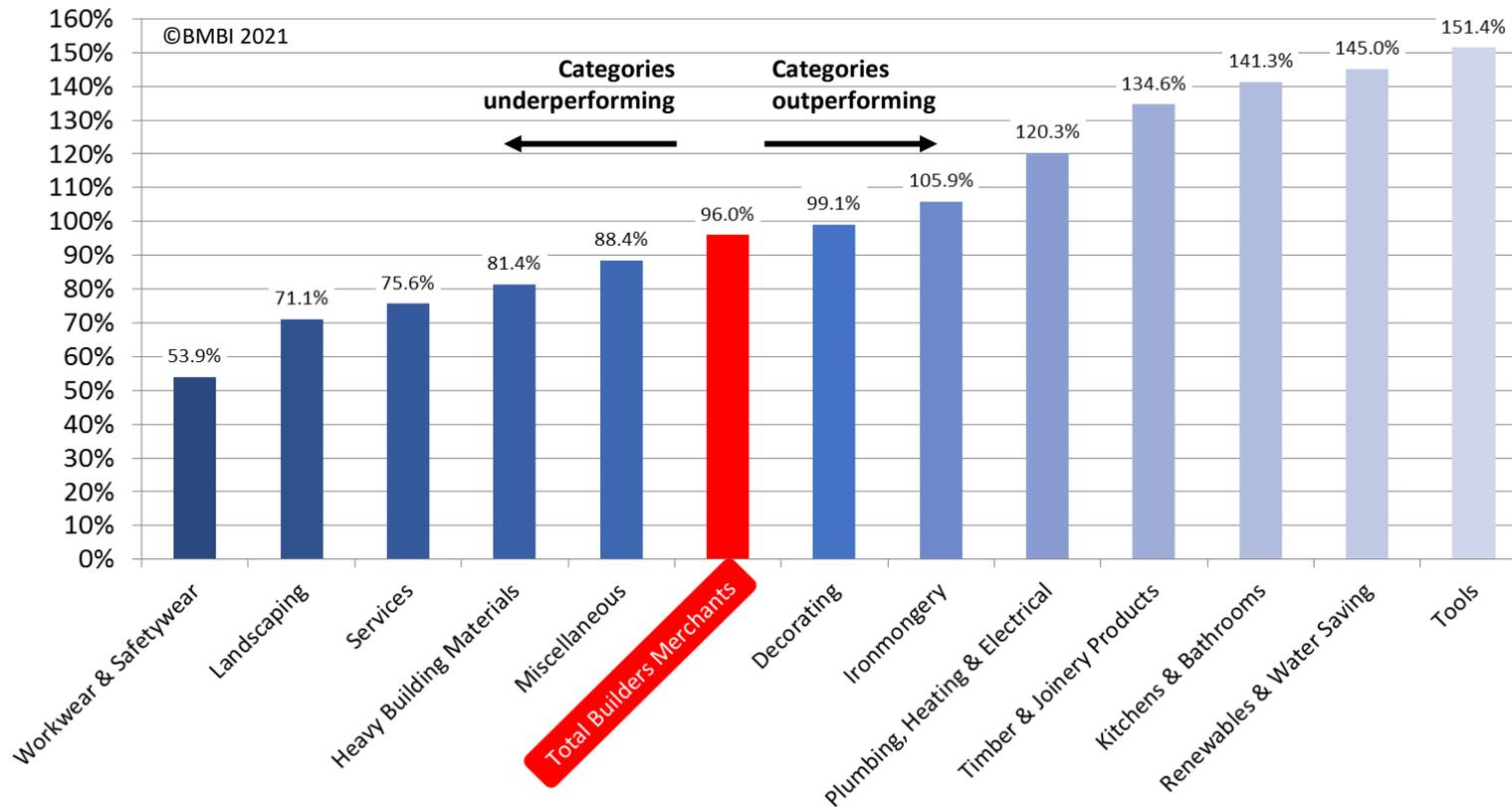
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2021

# Quarterly: This Year v Last Year

Q2 2021 sales indices



## Quarter 2 2021 index v Quarter 2 2020 index



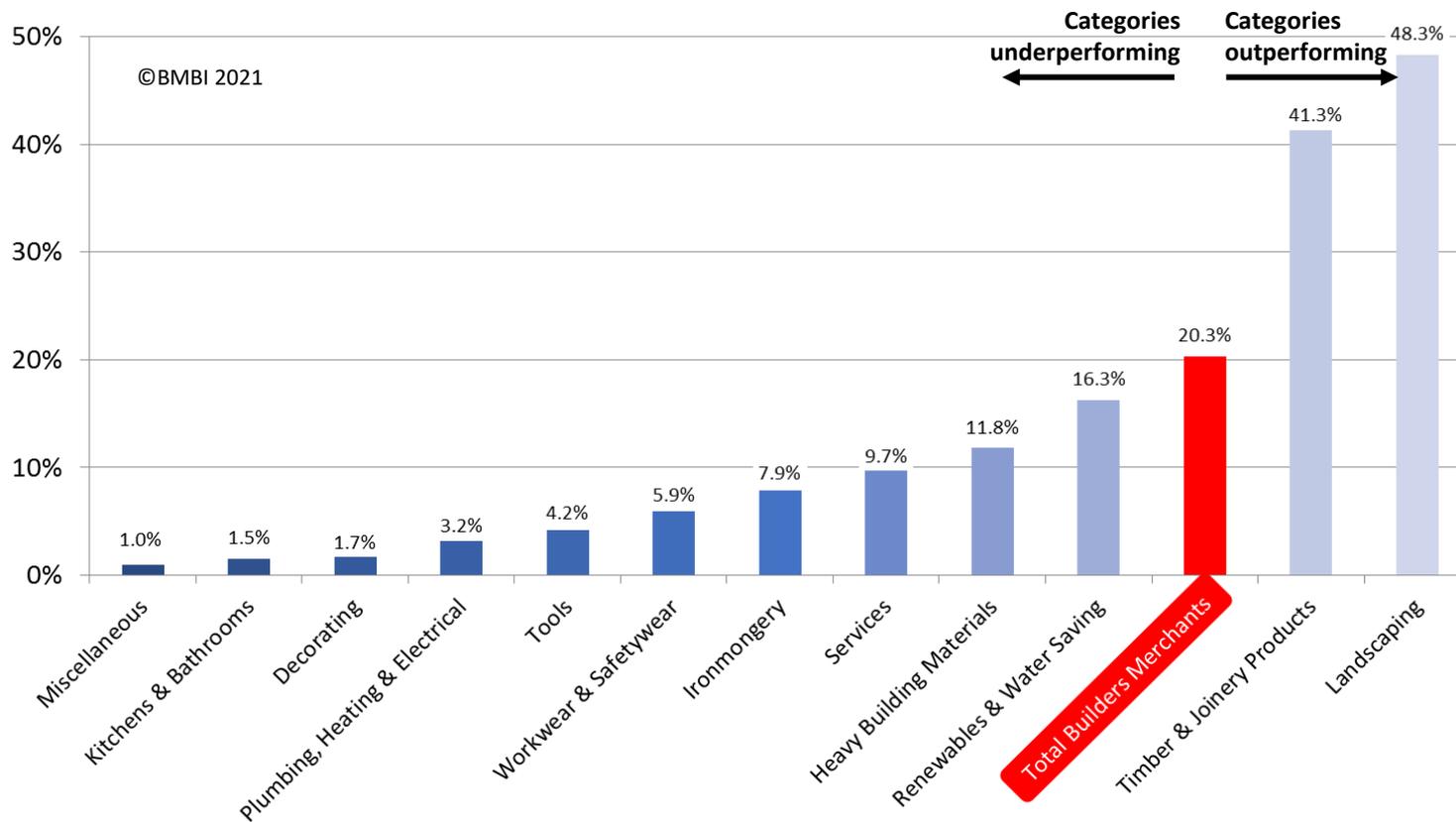
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2021

# Quarterly: This Year v 2019

Q2 2021 2-year sales indices



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



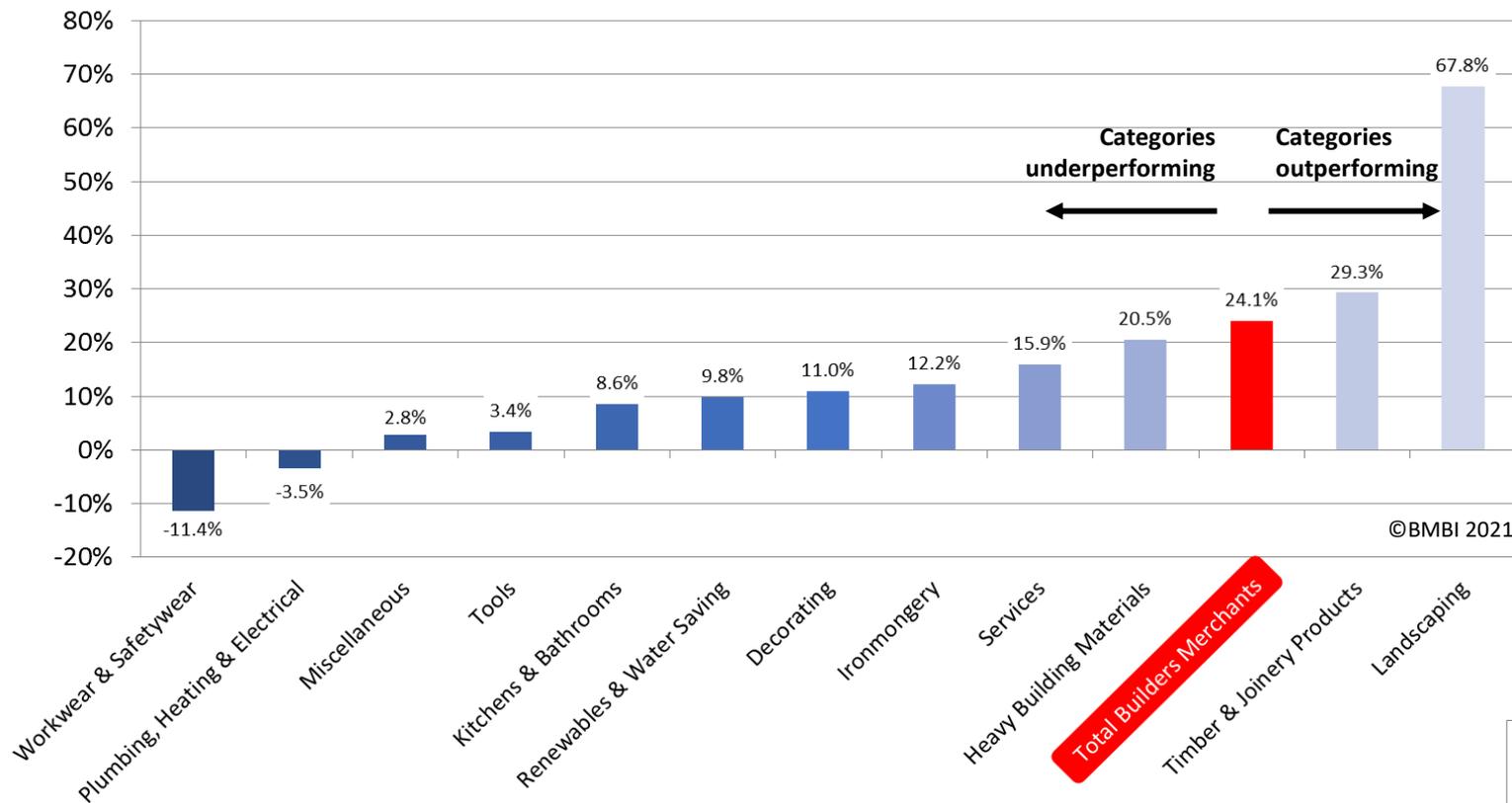
**GfK** Source: GfK's Builders Merchants Total Category Report July 2015 to June 2021

# Quarterly: Quarter on Quarter

Q2 2021 sales indices



## Quarter 2 2021 index v Quarter 1 2021 index



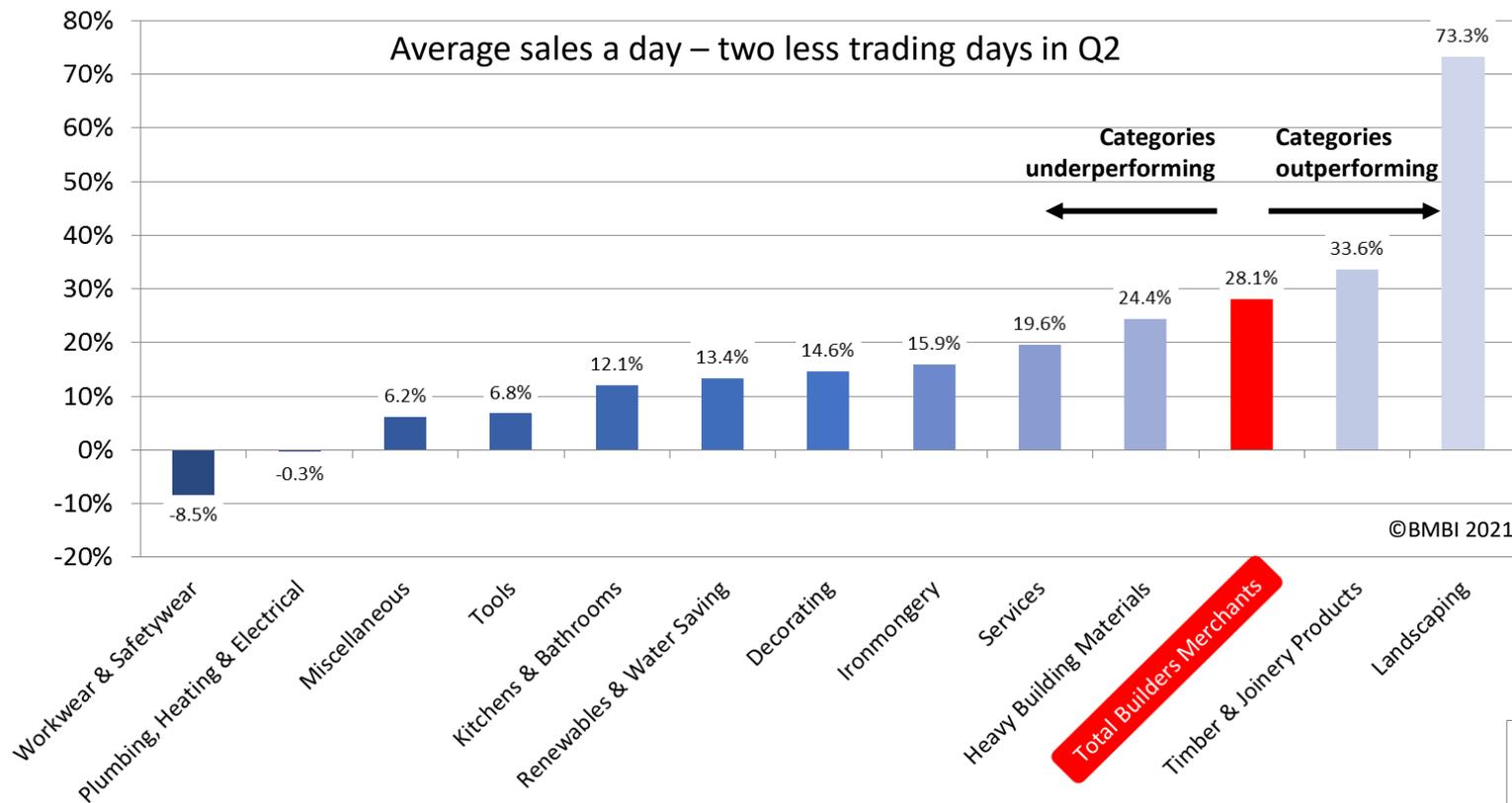
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2021

# Quarterly: Quarter on Quarter

Q2 2021 average sales a day indices



## Quarter 2 2021 index v Quarter 1 2021 index

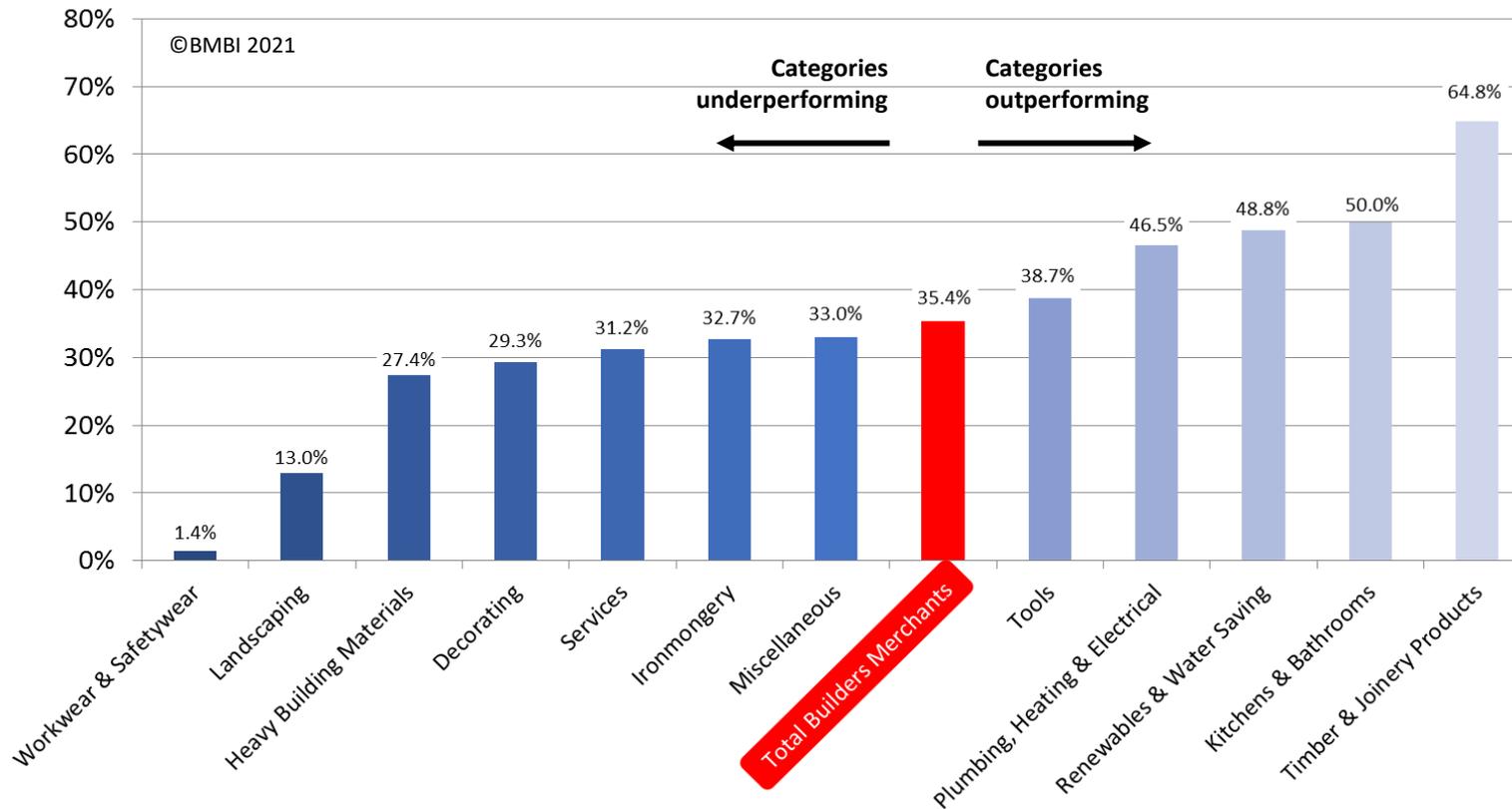


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to June 2021

# Latest 3 months: v last year

May to July sales indices

## 3 months May 21 to Jul 21 v 3 months May 20 to Jul 20



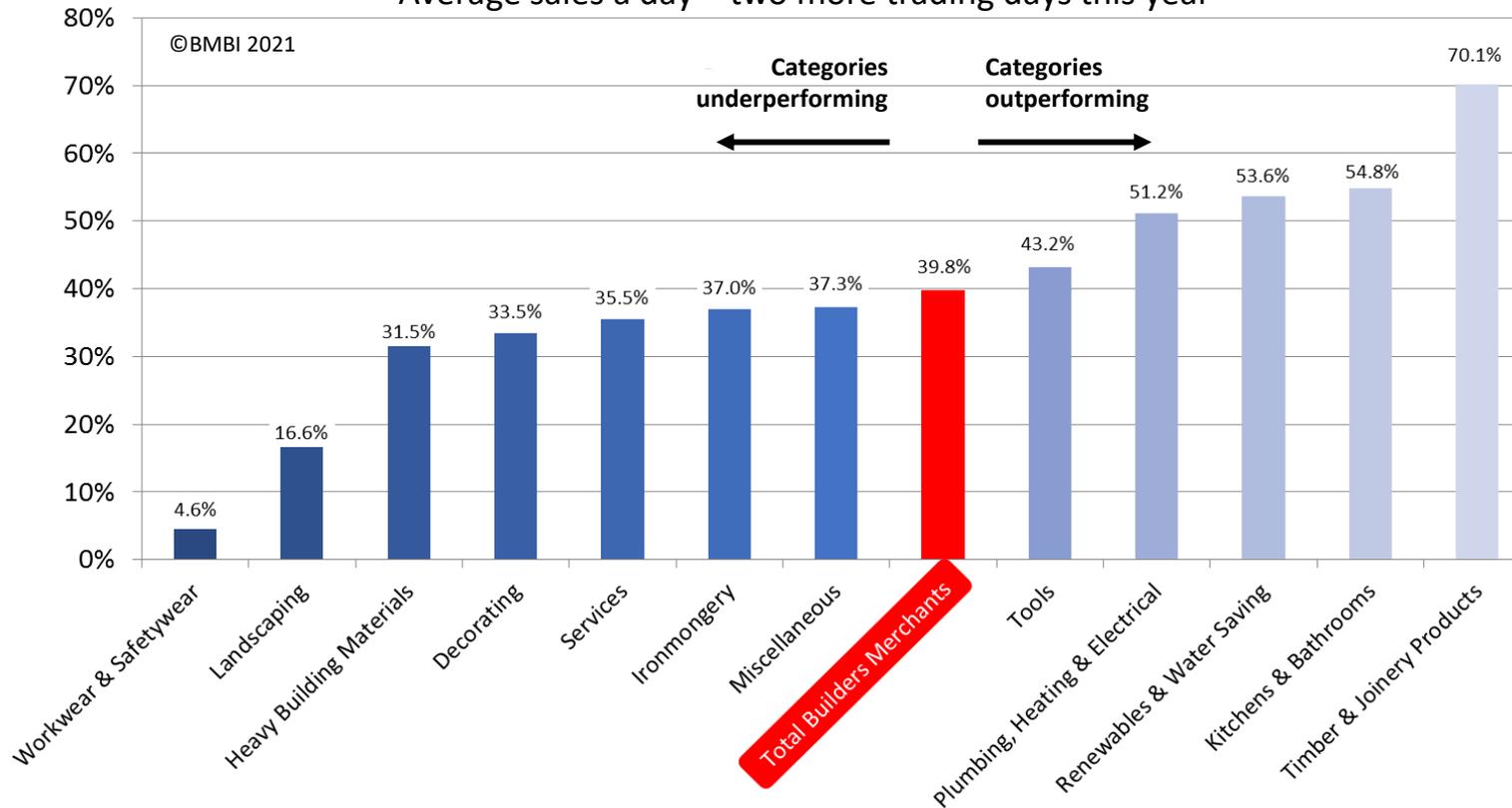
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Latest 3 months: v last year

May to July average sales a day indices

## 3 months May 21 to Jul 21 v 3 months May 20 to Jul 20

Average sales a day – two more trading days this year

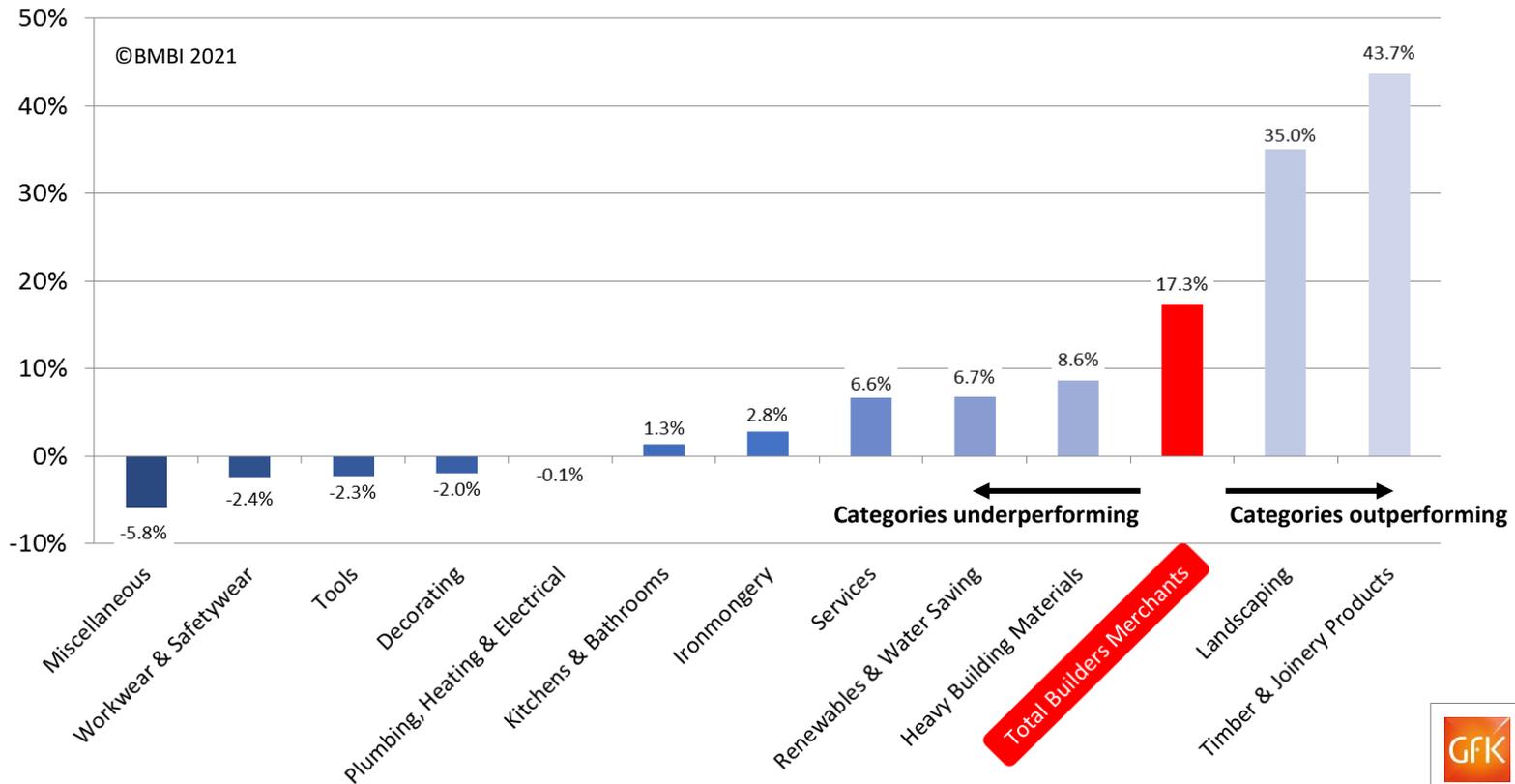


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Latest 3 months: v 2019

May to July 2-year sales indices

## 2-year comparison: May 21 to Jul 21 v May 19 to Jul 19



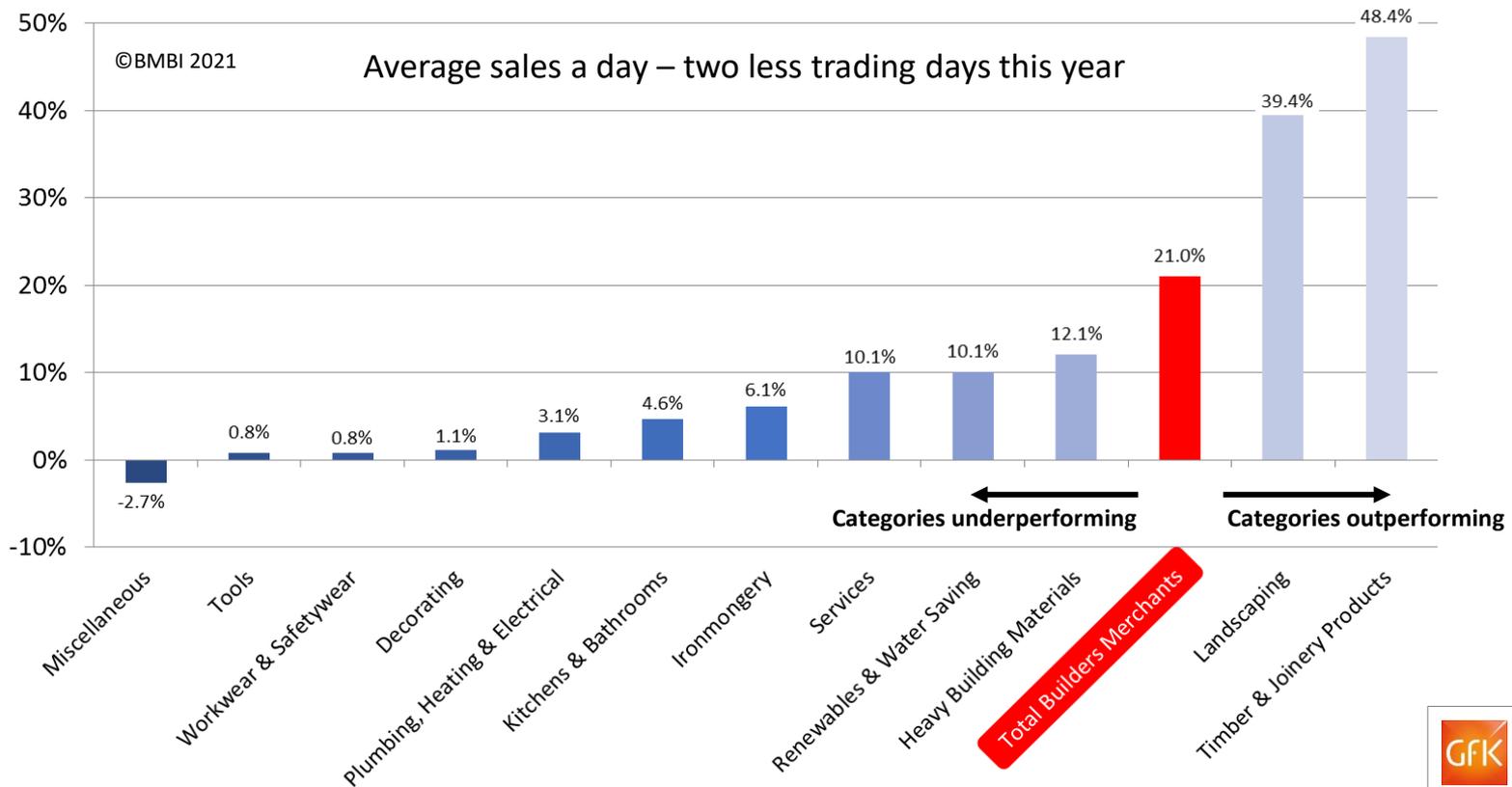
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Latest 3 months: v 2019

May to July 2-year average sales a day indices



## 2-year comparison: May 21 to Jul 21 v May 19 to Jul 19



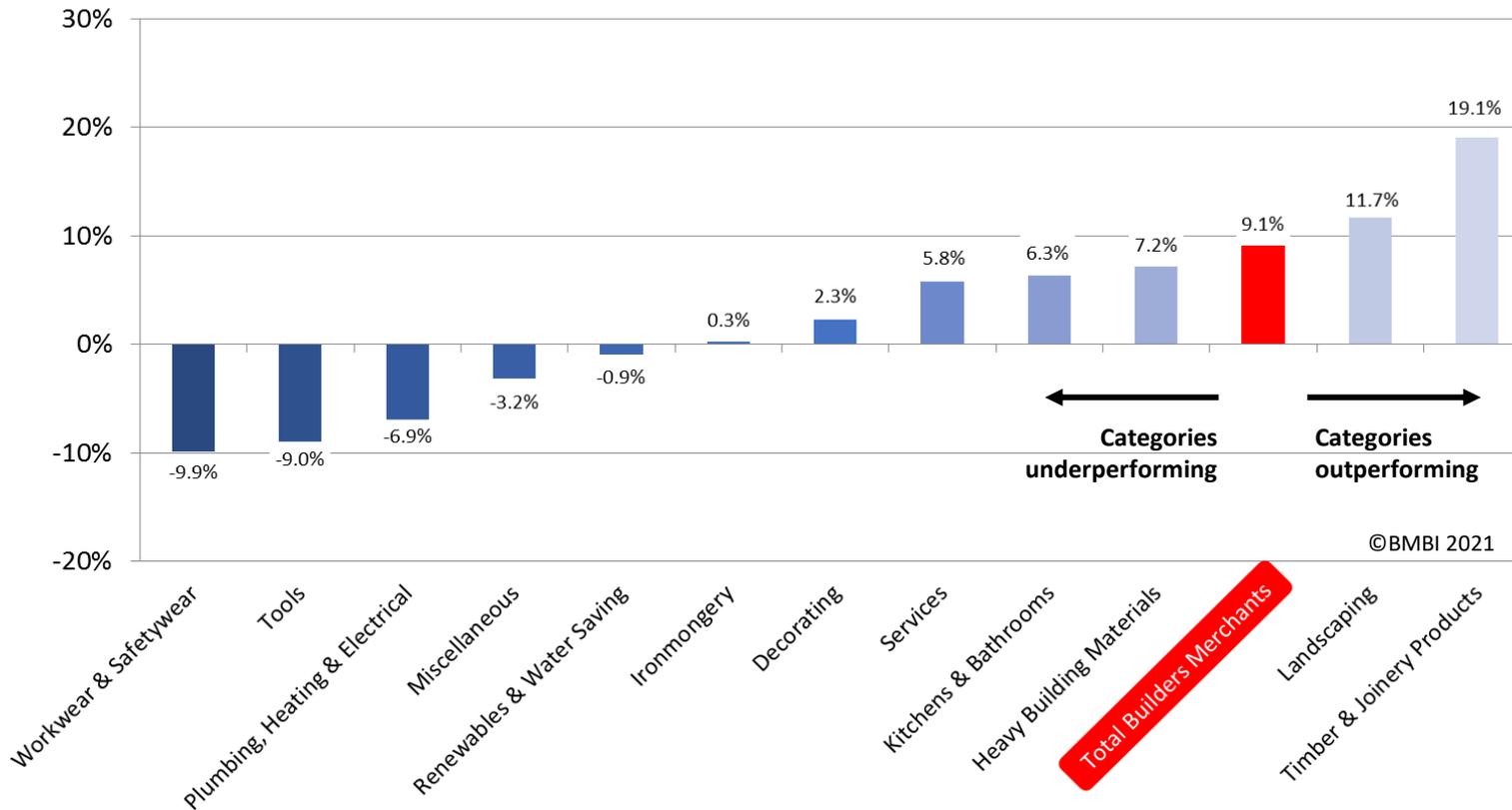
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Latest 3 months: v previous 3 months

May to July sales indices



## 3 months May 21 to Jul 21 v 3 months Feb 21 to Apr 21



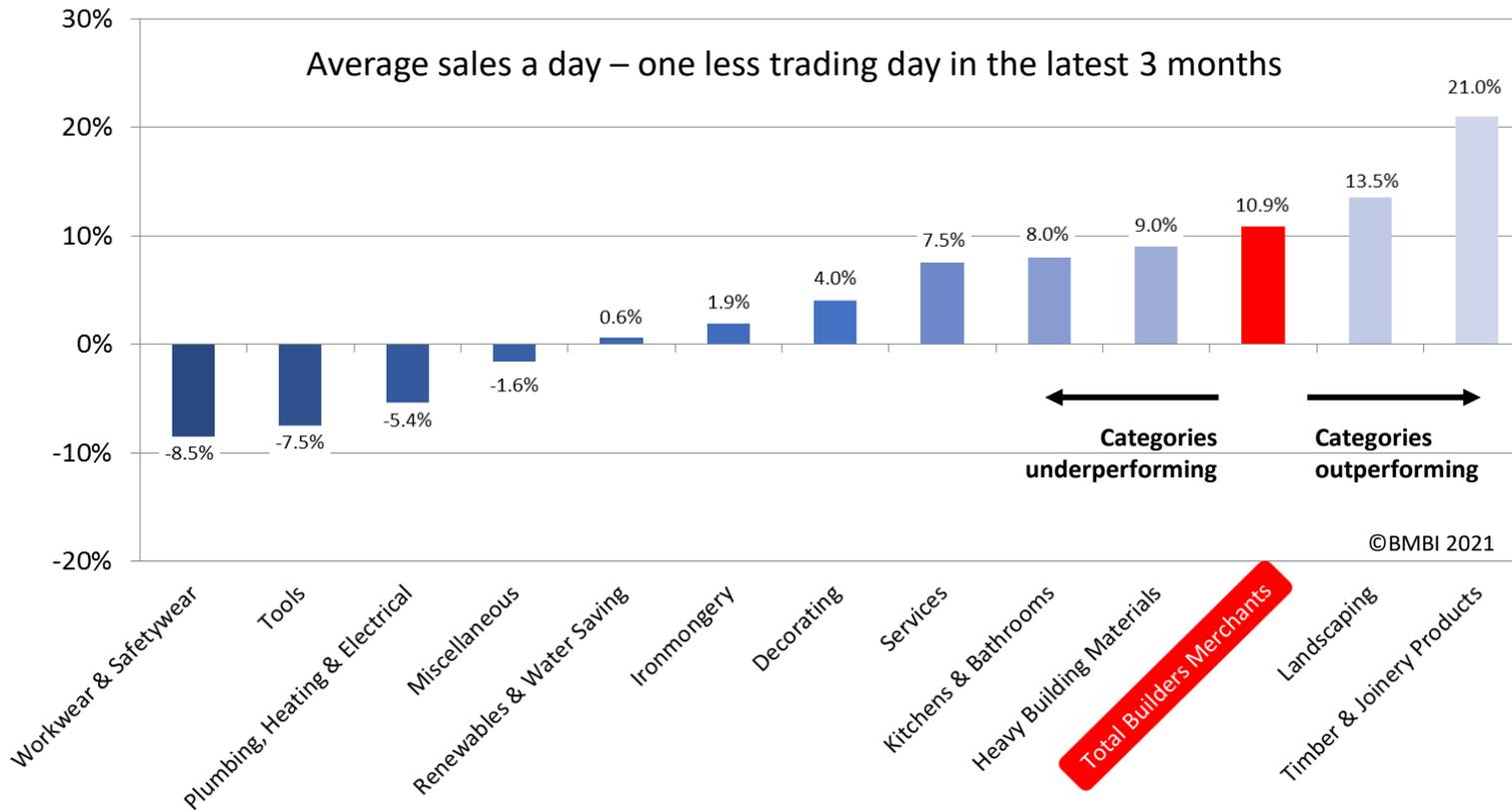
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Latest 3 months: v previous 3 months

May to July average sales a day indices



## 3 months May 21 to Jul 21 v 3 months Feb 21 to Apr 21



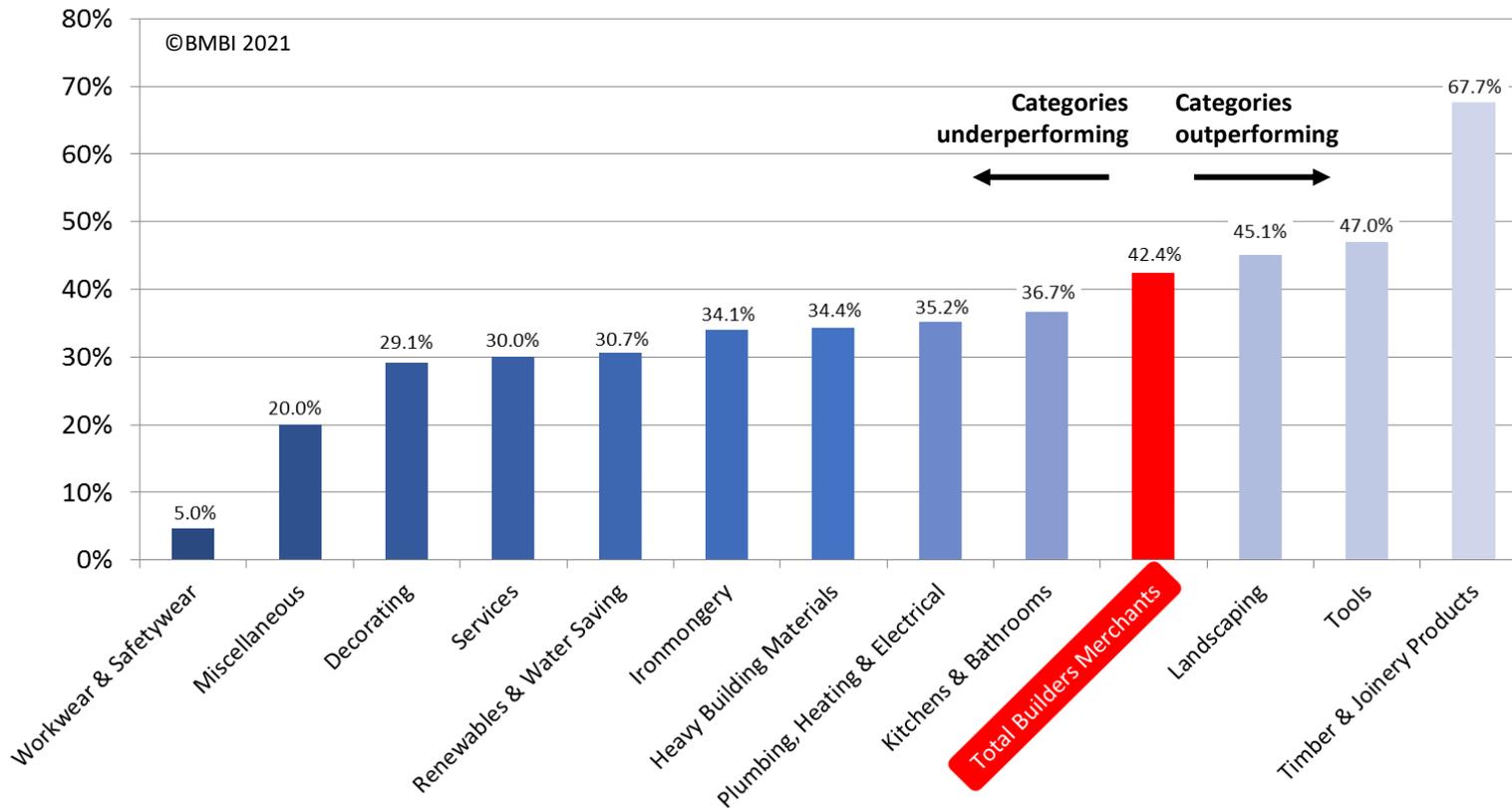
Source: GfK's Builders Merchants Total Category Report July 2015 to July 2021

# Year to date: Year on Year

Last 7 months sales indices



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



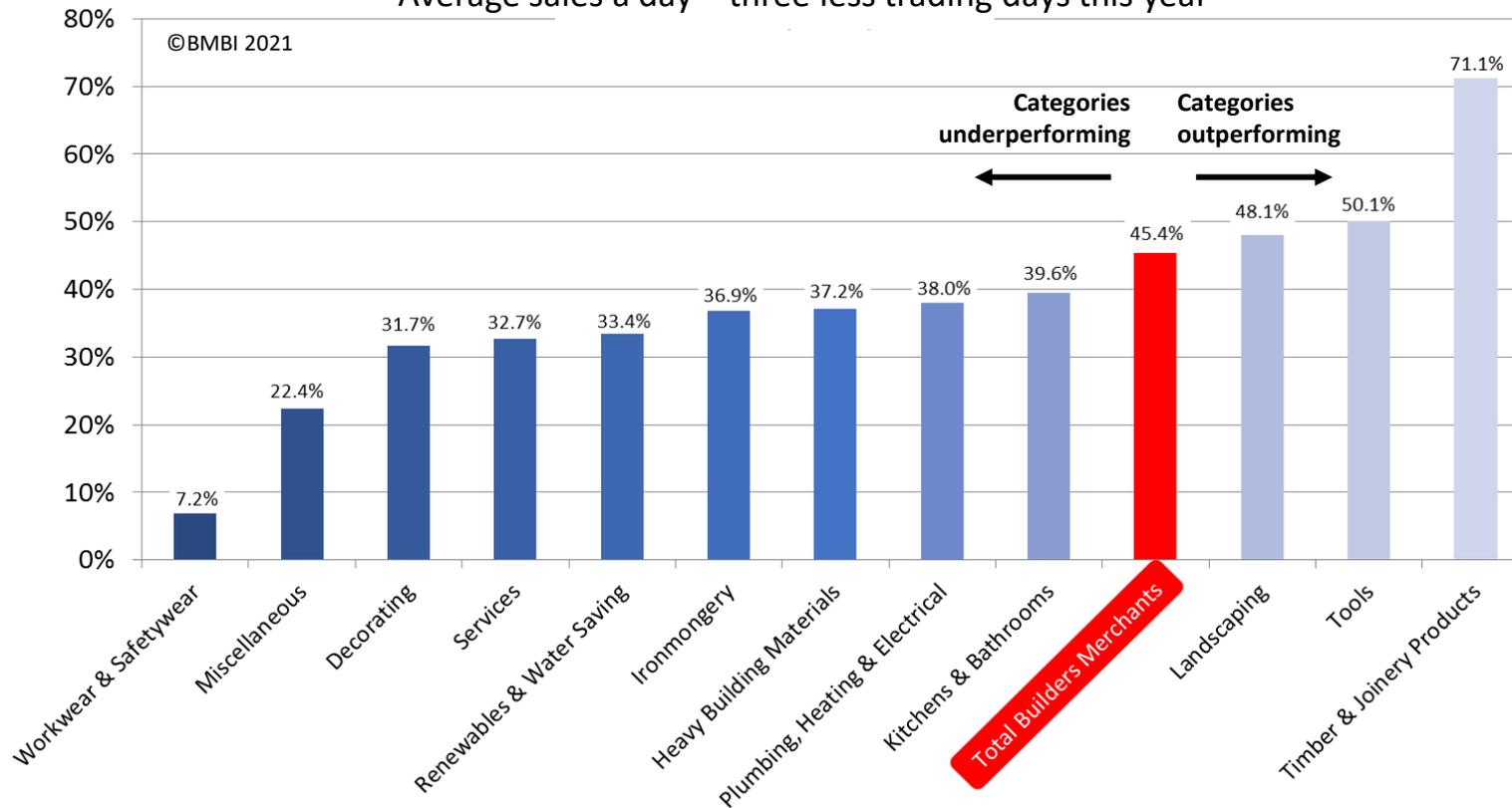
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Year to date: Year on Year

Last 7 months average sales a day indices

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

Average sales a day – three less trading days this year

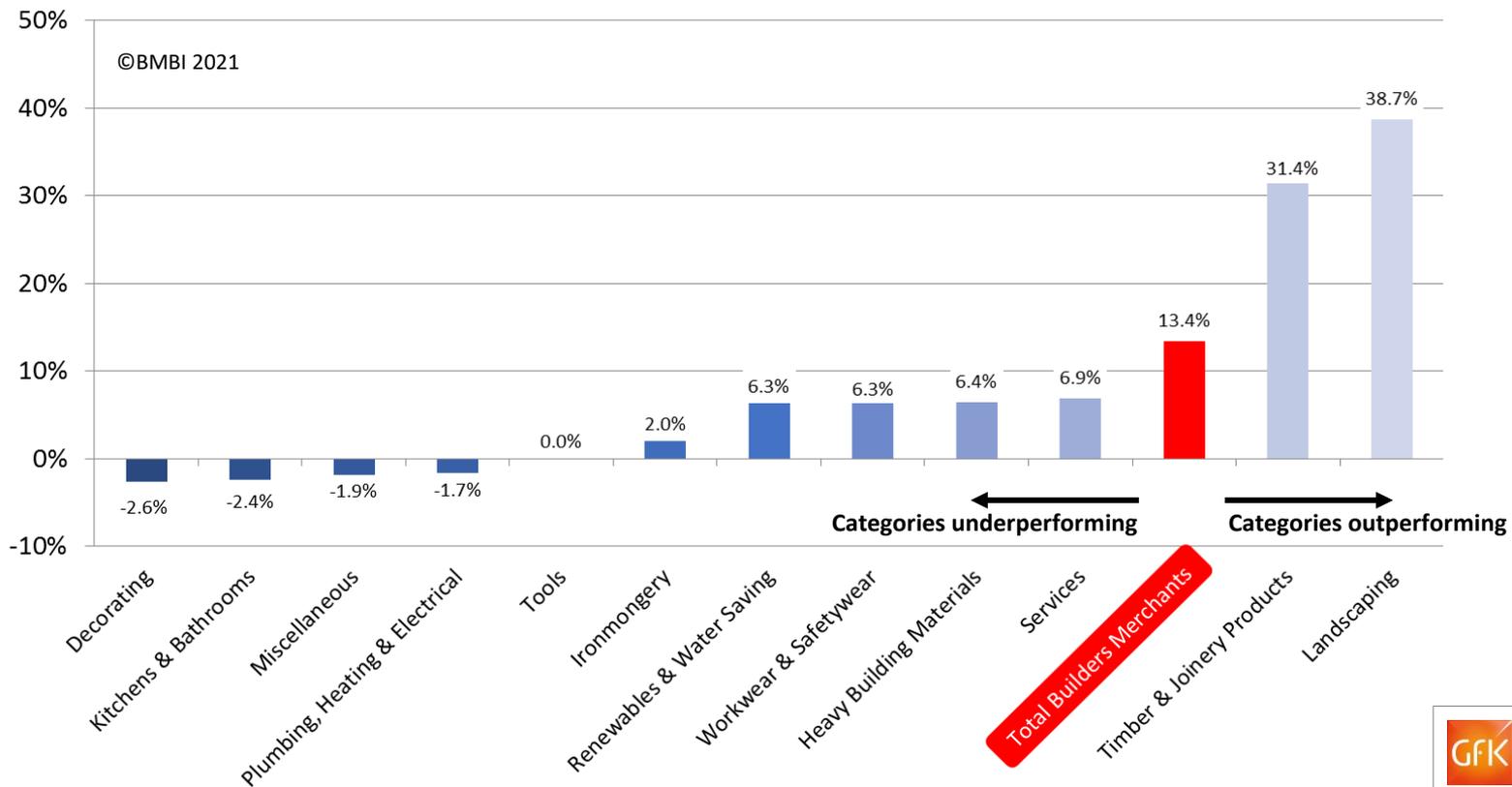


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Year to date: v 2019

Last 7 months 2-year sales indices

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



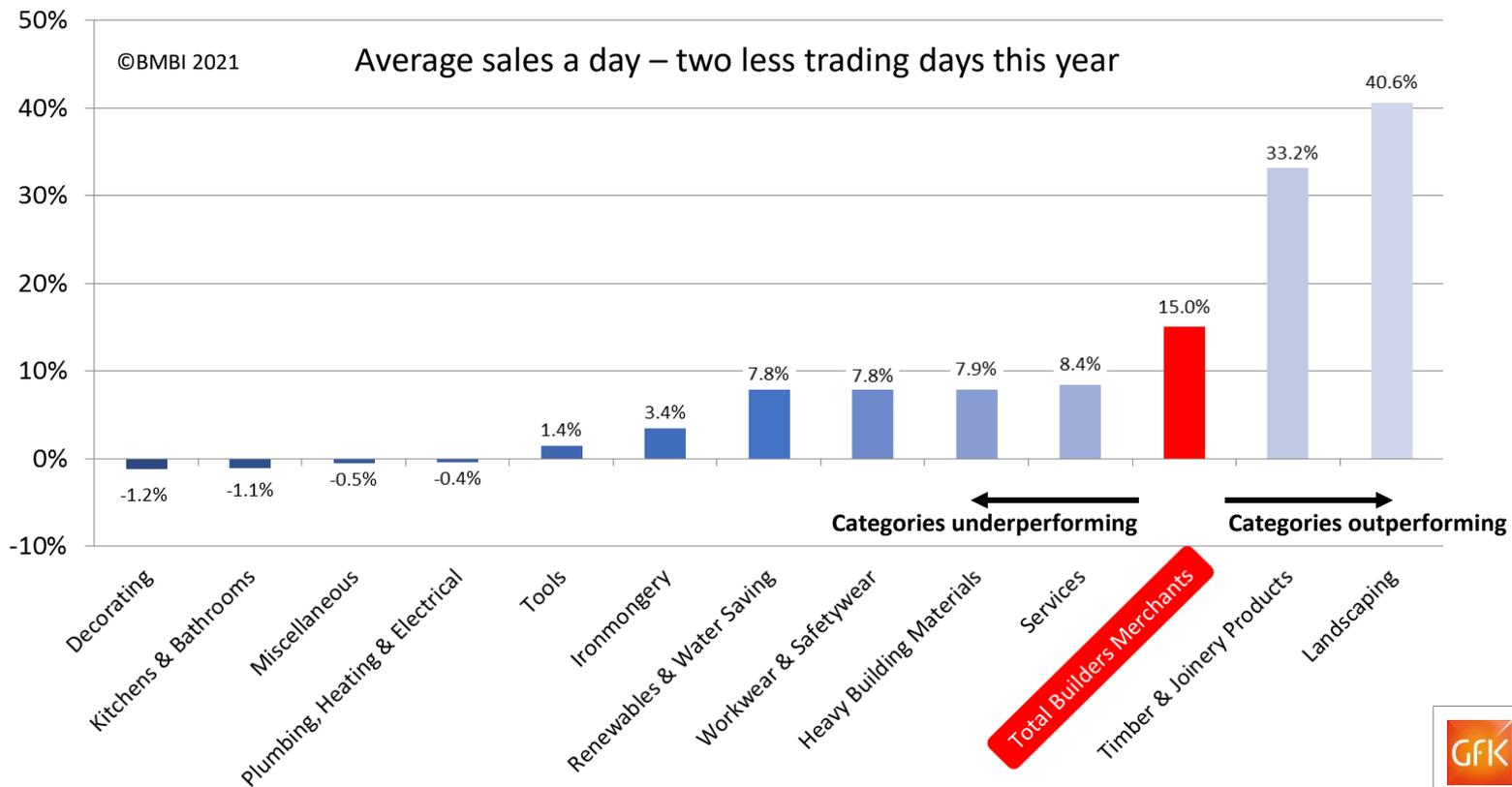
**GfK** Source: GfK's Builders Merchants Total Category Report July 2015 to July 2021

# Year to date: v 2019

Last 7 months 2-year average sales a day indices



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

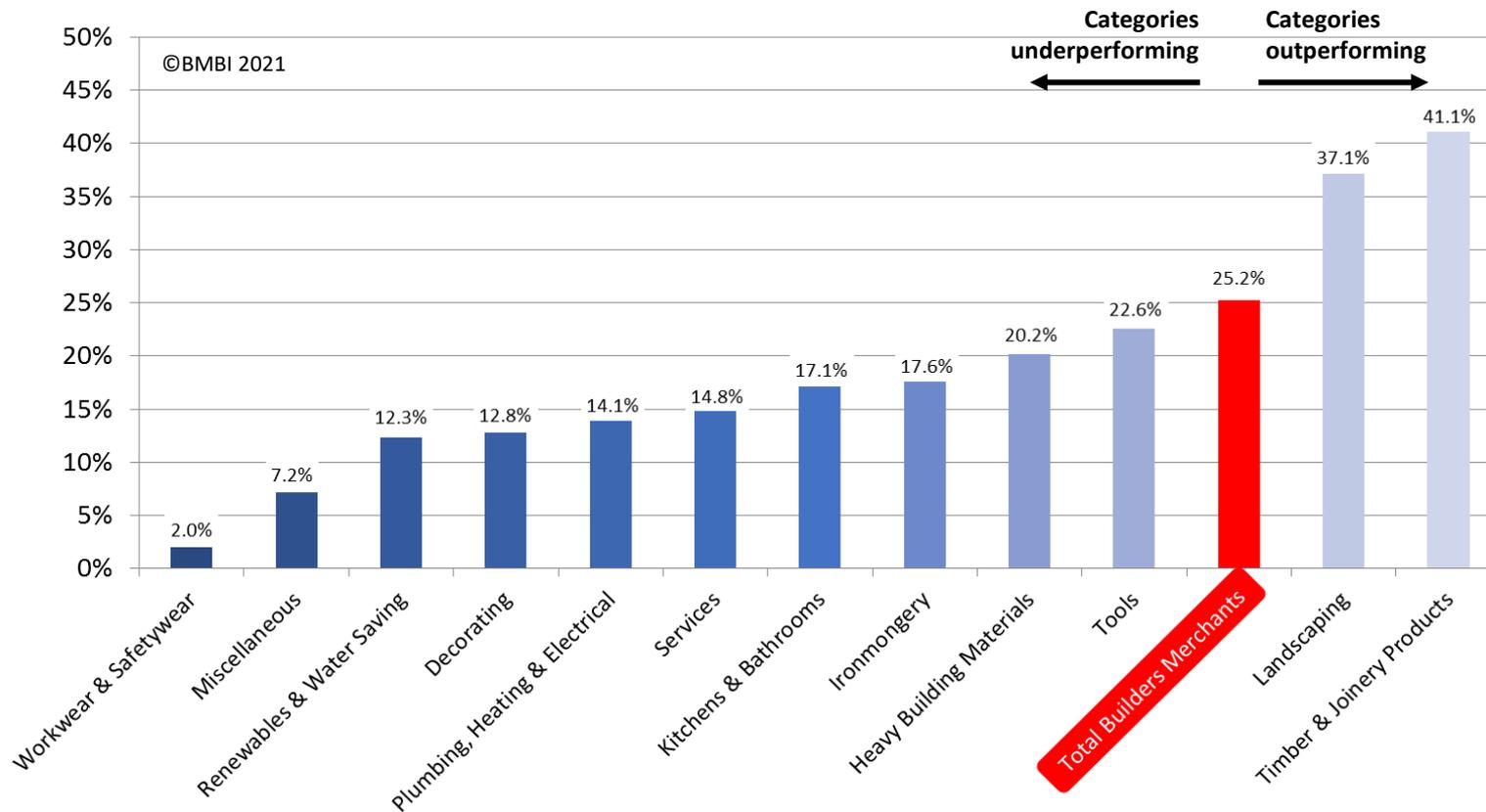


Source: GfK's Builders Merchants Total Category Report July 2015 to July 2021

# Last 12 months: Year on Year

MAT

## 12 months Aug 20 to Jul 21 v 12 months Aug 19 to Jul 20

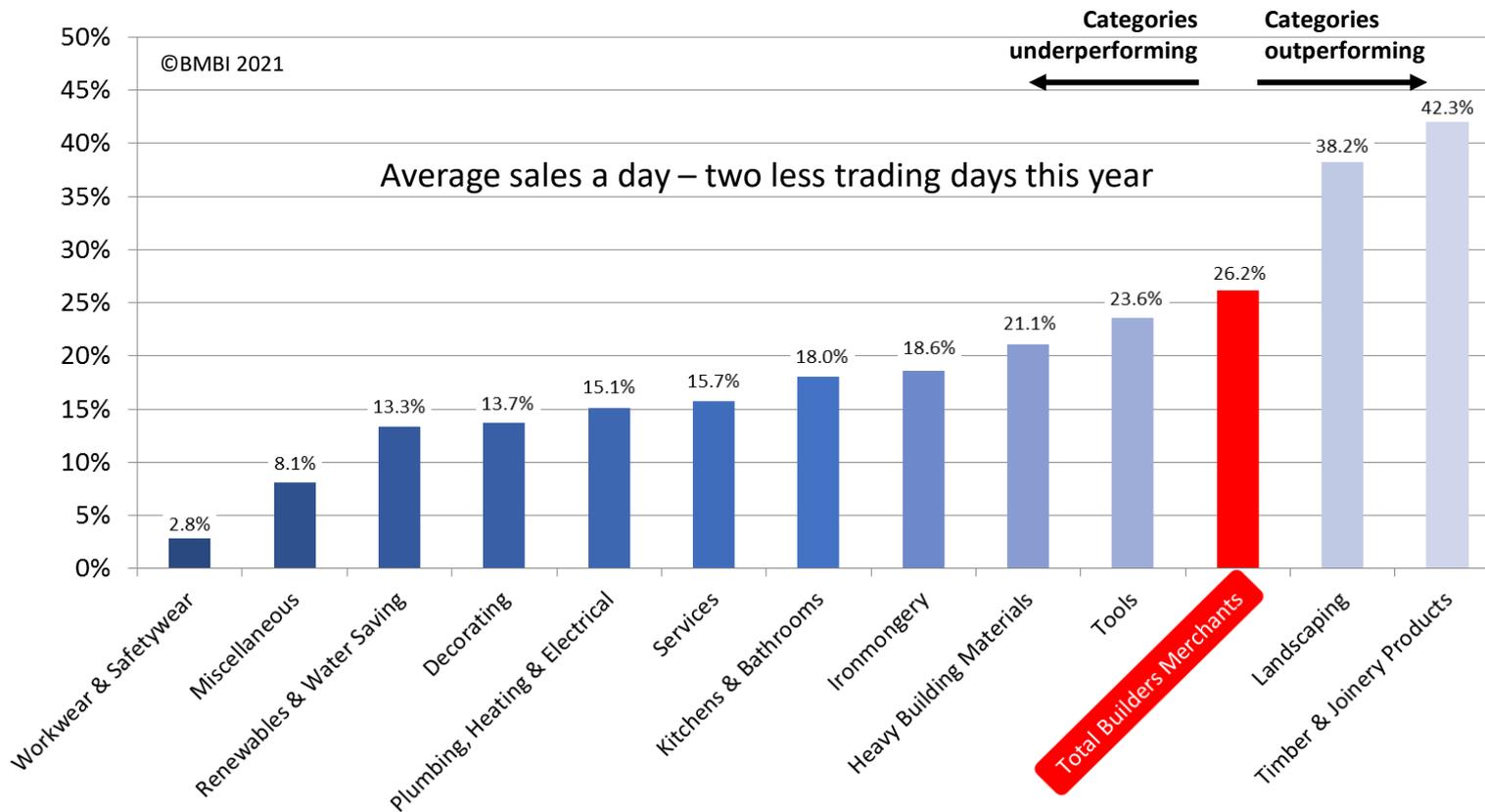


 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Last 12 months: Year on Year

MAT average sales a day

## 12 months Aug 20 to Jul 21 v 12 months Aug 19 to Jul 20



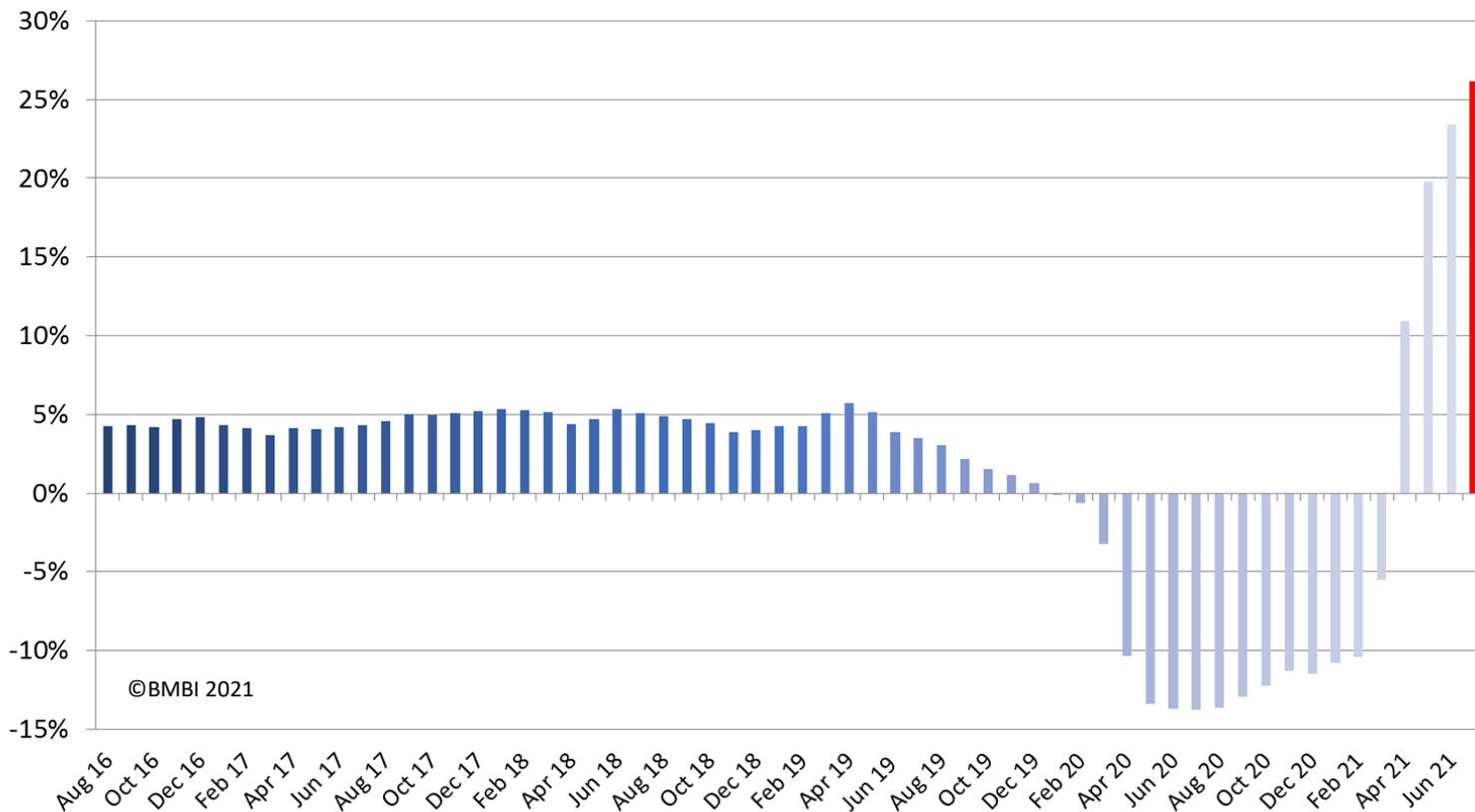
 Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# 12 months: Year on Year

MAT



## MAT: Total Builders Merchants July 2016 to July 2021

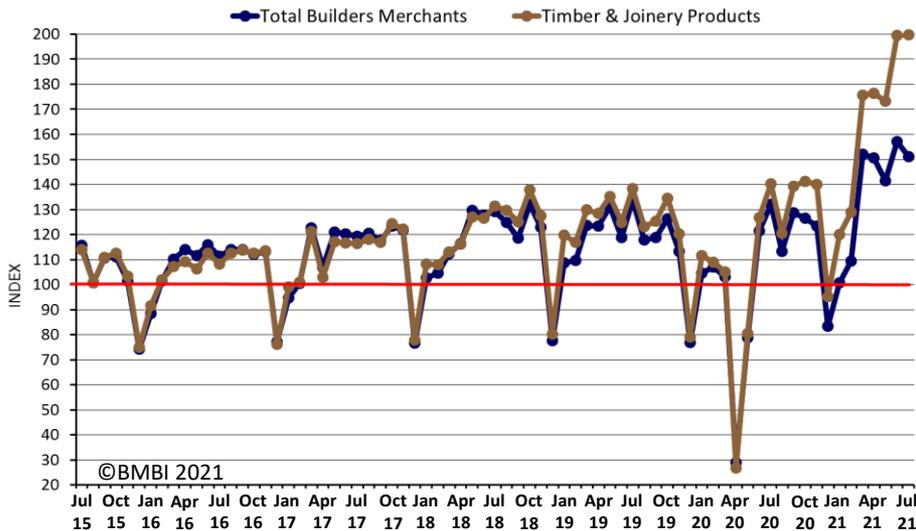


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2021

# Monthly: Indices

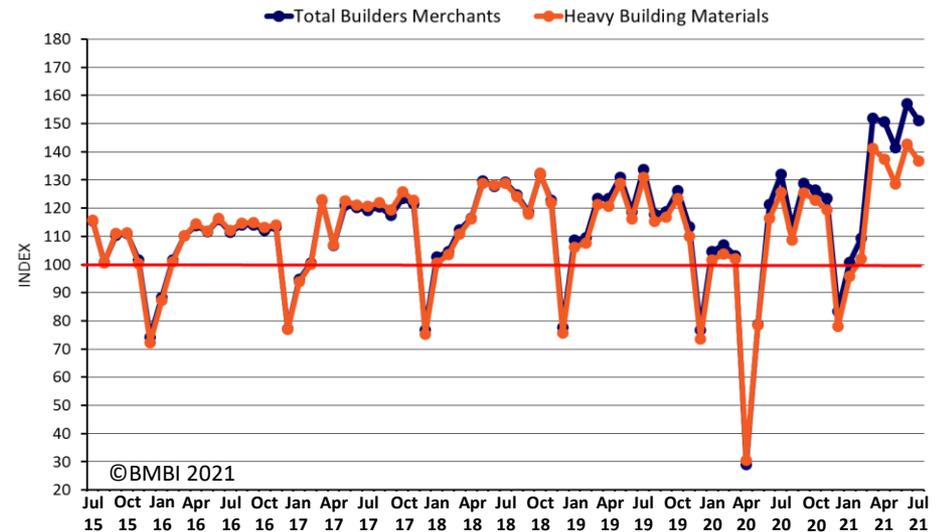
July 2021

## Timber & Joinery Products



Indexed on July 2014 – June 2015

## Heavy Building Materials

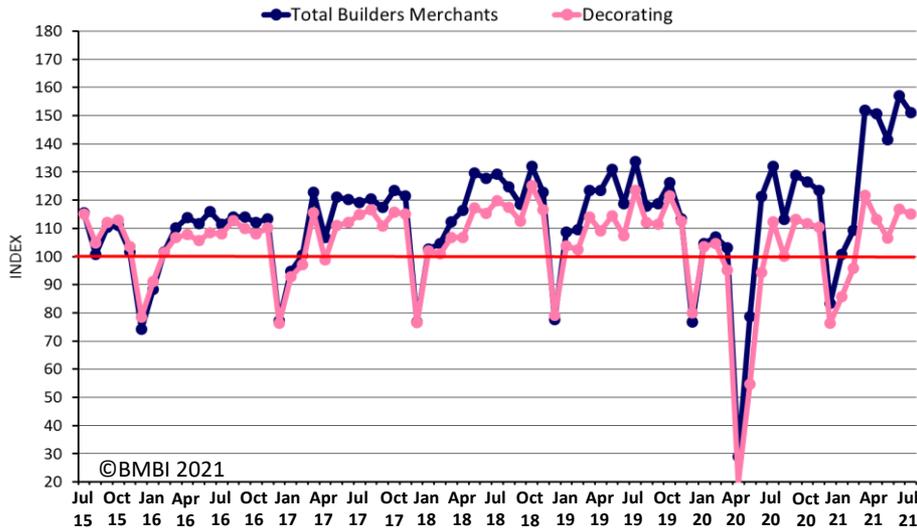


Indexed on July 2014 – June 2015

# Monthly: Indices

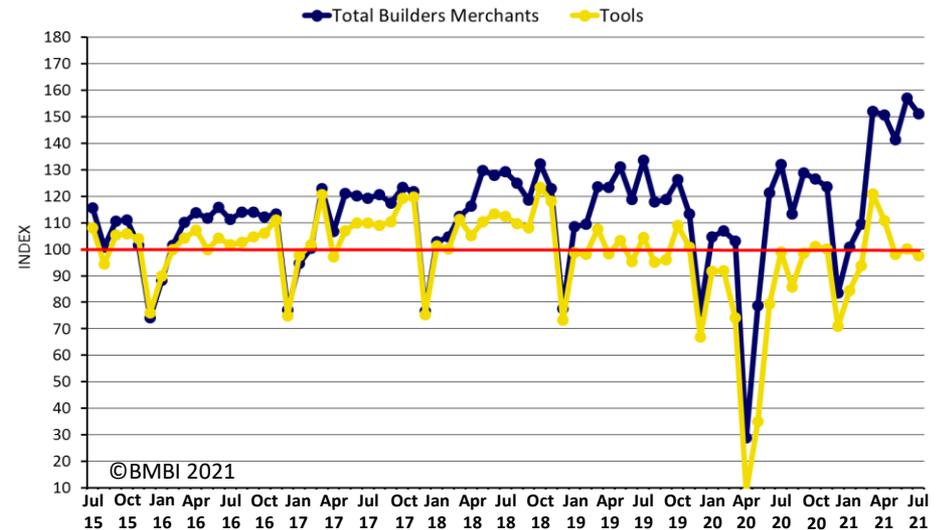
July 2021

## 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 July 2021

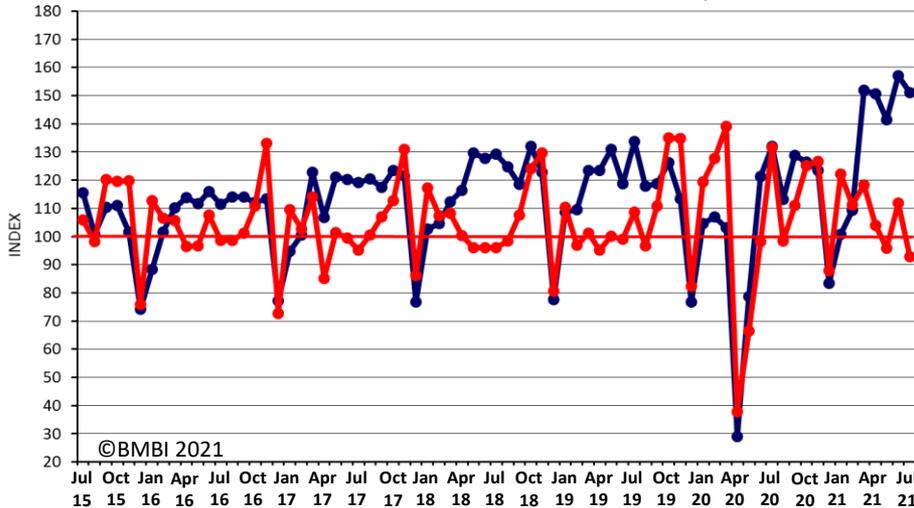
# Monthly: Indices

July 2021



## Workwear & Safetywear

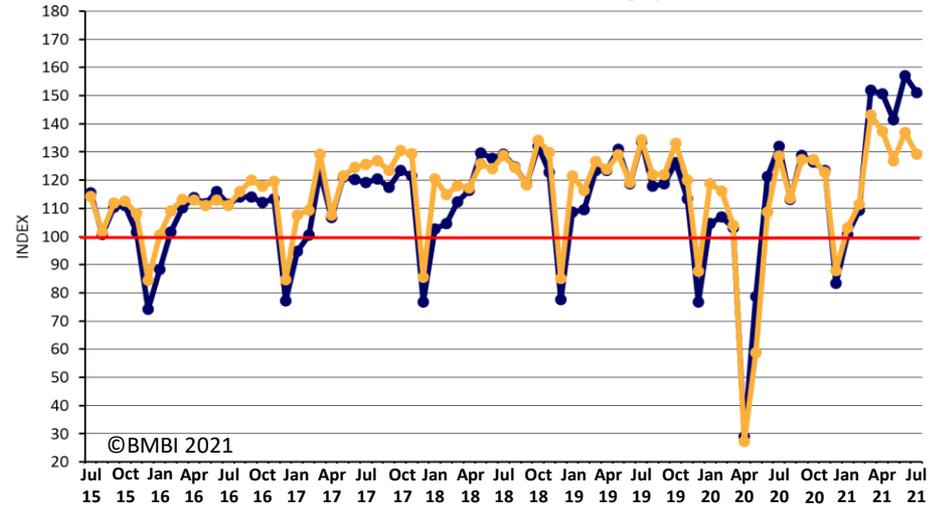
— Total Builders Merchants — Workwear & Safetywear



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 July 2021

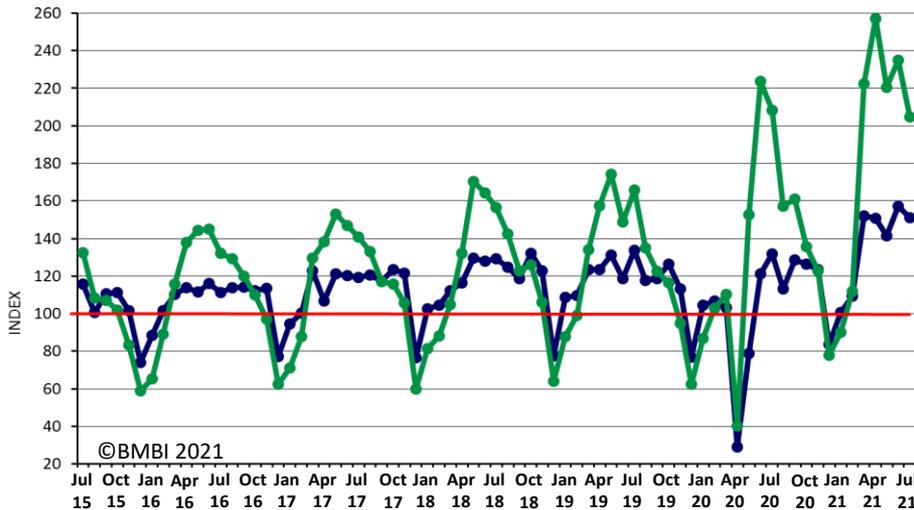
# Monthly: Indices

July 2021



## Landscaping

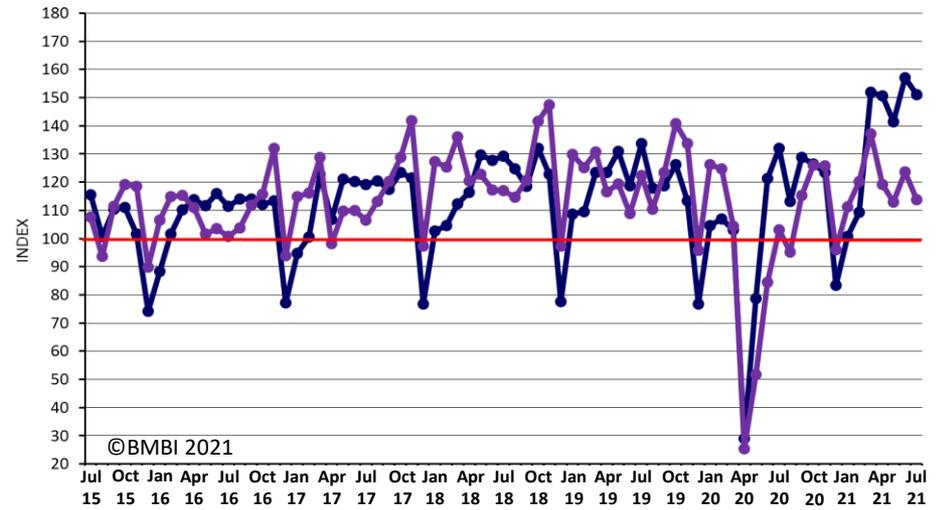
◆ Total Builders Merchants    ◆ Landscaping



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 July 2021

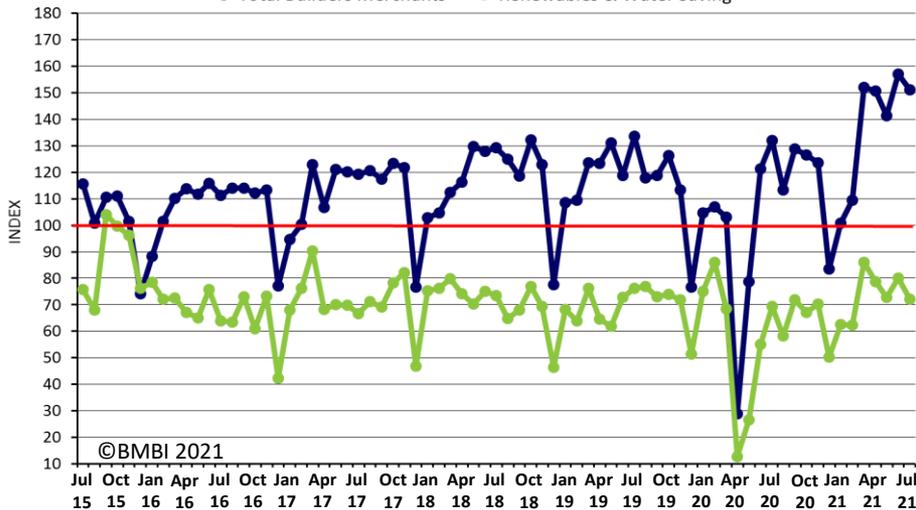
# Monthly: Indices

July 2021



## Renewables & Water Saving

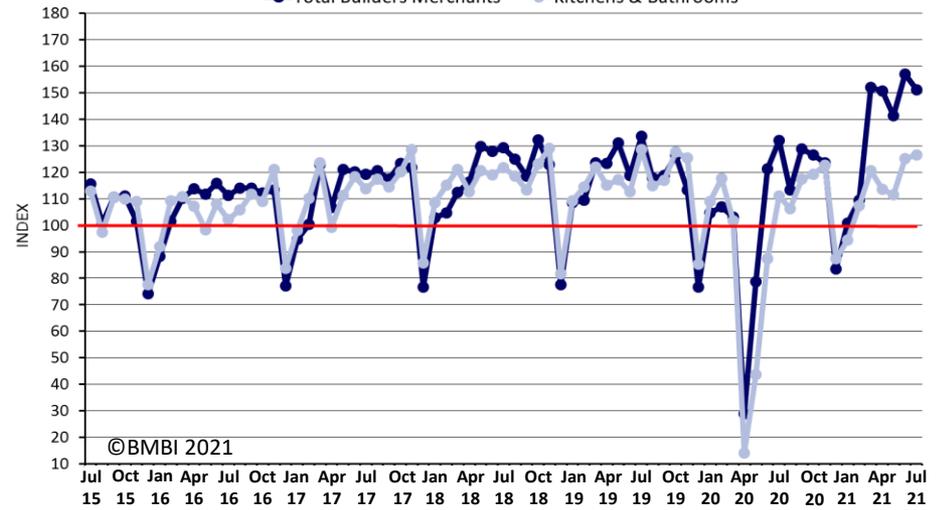
■ Total Builders Merchants ■ Renewables & Water Saving



Indexed on July 2014 – June 2015

## Kitchens & Bathrooms

■ Total Builders Merchants ■ Kitchens & Bathrooms



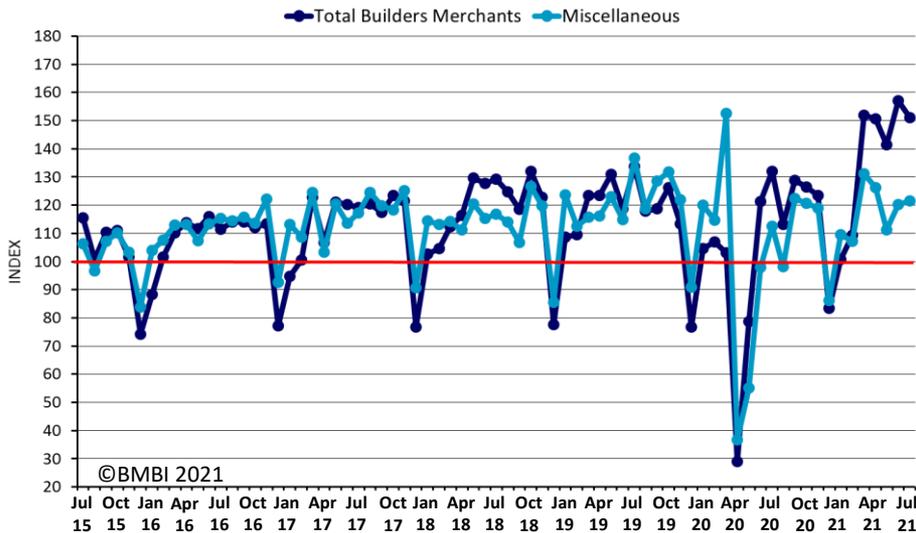
Indexed on July 2014 – June 2015

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

# Monthly: Indices

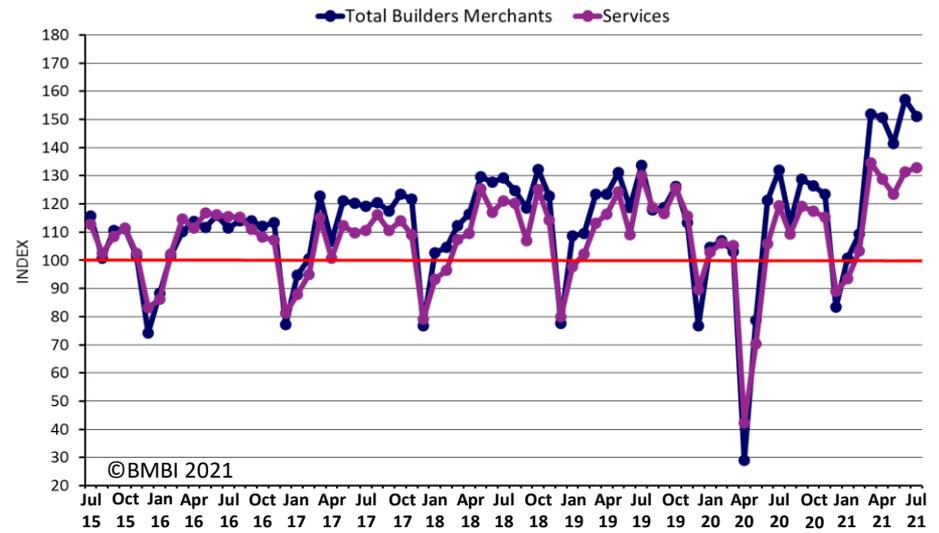
July 2021

## Miscellaneous



Indexed on July 2014 – June 2015

## Services



Indexed on July 2014 – June 2015

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

# Trading Days

## Monthly

Index: 20.8

2015											
						Jul	Aug	Sep	Oct	Nov	Dec
						22	20	22	22	21	17
2016											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	21	21	21	20	22	21	22	22	21	22	17
2017											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	23	18	21	22	21	22	21	22	22	16
2018											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	21	21	22	22	20	23	22	15
2019											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	21	20	23	21	21	23	21	15
2020											
Jan	Feb	Mar*	Apr*	May*	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	20	19	22	21					

## Quarterly

Index: 62.3

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

## Half Year

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

## Full Year

2016
250
2017
249
2018
249
2019
248
2020
250
2021

\*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.

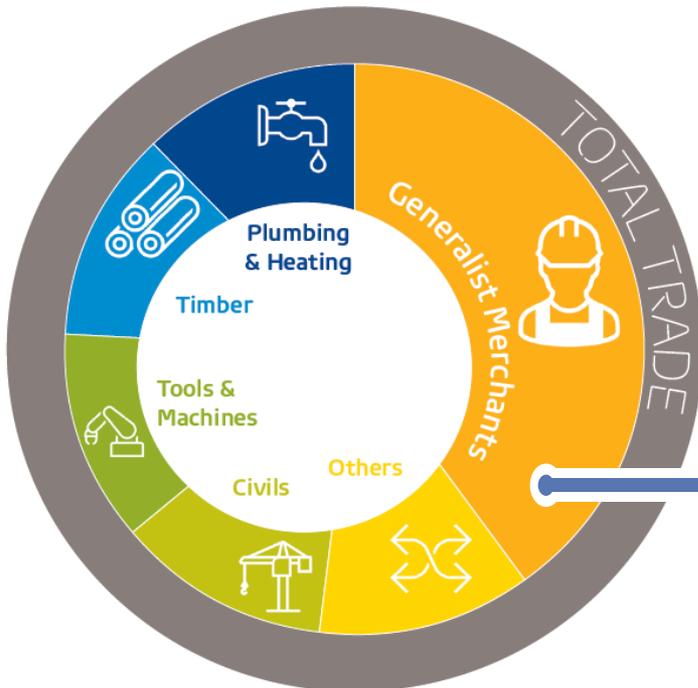
# GfK's Definition of Builders Merchant Panel



## 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

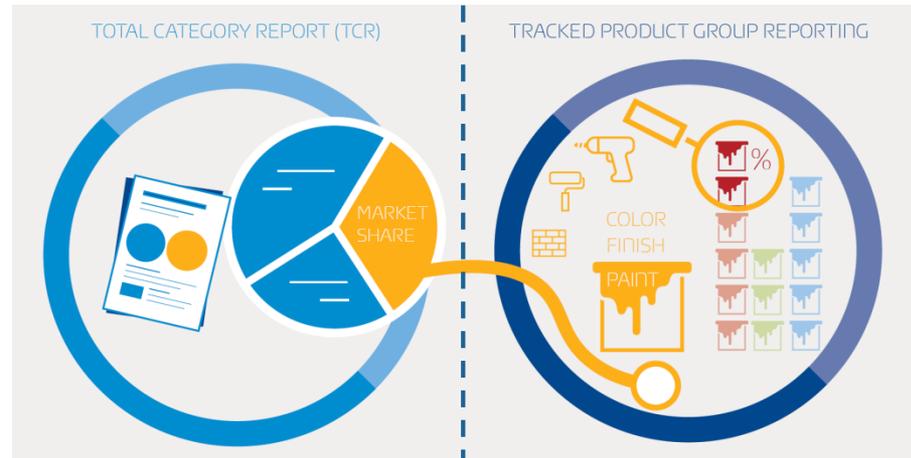
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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](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



**July 2021**

(Published 20 September 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](mailto:Ralph@mra-research.co.uk) or Tom Rigby: [Tom@mra-research.co.uk](mailto: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](mailto:emile.van-der-ryst@gfk.com).

# Overview and Insights

## July sales-a-day up 23.6% on July 2020 on like-for-like basis, and up 9% on July 2019

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 12.8% in July 2021 compared to July 2020 (see [page 60](#)), with two less trading days this year. Like-for-like, average sales a day, which take trading day differences into account, were 23.6% higher. Compared with two years ago, absolute sales values in July 2021 were slightly down (-0.5%) but with two less trading days this year, average sales a day were 9.0% higher than in July 2019 ([page 61](#)).

Total value sales in July were 0.5% higher than in June, with one less trading day this month ([page 62](#)). Average sales a day were 5.2% higher.

July's PHMI Index, which contrasts sales with the base period of January to December 2019, was 99.6 – see the table on [page 58](#) and the chart on [page 59](#). The PHMI Index was slightly lower (98.7) in the last three months (May to July).

Sales in the three months May to July 2021 were 42.6% higher compared with the Covid-affected same three months last year, with two less trading days this year and a fully opened market ([page 63](#)). Average sales a day were 47.2% higher.

Sales in May to July 2021 were up 2.3% on the same three months in 2019, with two less trading days this year. Average sales a day increased by 5.6%.

Comparing the three months May to July 2021 with the previous 3 months (February to April) sales were 8.1% lower, with one less trading day in the most recent period ([page 64](#)). Average sales a day were down 6.6%.

Sales in the first seven months of 2021 were 32.5% higher than in January to July 2020, with three less trading days this year ([page 68](#)). Average sales a day were 35.2% higher.

Looking back two years, sales in the first seven months of 2021 were 3.1% ahead of January to July 2019, with two less trading days this year. Average sales a day increased by 4.6% ([page 69](#)).

Plumbing & Heating Merchants' sales in the 12 months August 2020 to July 2021 were 16.4% higher than in the same period a year earlier, with two less trading days in the most recent period ([page 70](#)). Average sales a day grew by 17.3%.

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 12.8% in July 2021 compared with July 2020 – and up 23.6% on like-for-like sales a day basis.

# Indices: Monthly and quarterly

August 2020 to July 2021

(Indexed on January to December 2019)

<b>Aug 20</b>	<b>Sep 20</b>	<b>Oct 20</b>	<b>Three months</b>
85.9	103.0	115.2	101.3
<b>Nov 20</b>	<b>Dec 20</b>	<b>Jan 21</b>	<b>Three months</b>
111.1	83.9	99.4	98.1
<b>Feb 21</b>	<b>Mar 21</b>	<b>Apr 21</b>	<b>Three months</b>
102.4	118.2	101.8	107.5
<b>May 21</b>	<b>Jun 21</b>	<b>Jul 21</b>	<b>Three months</b>
97.4	99.2	99.6	98.7

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:

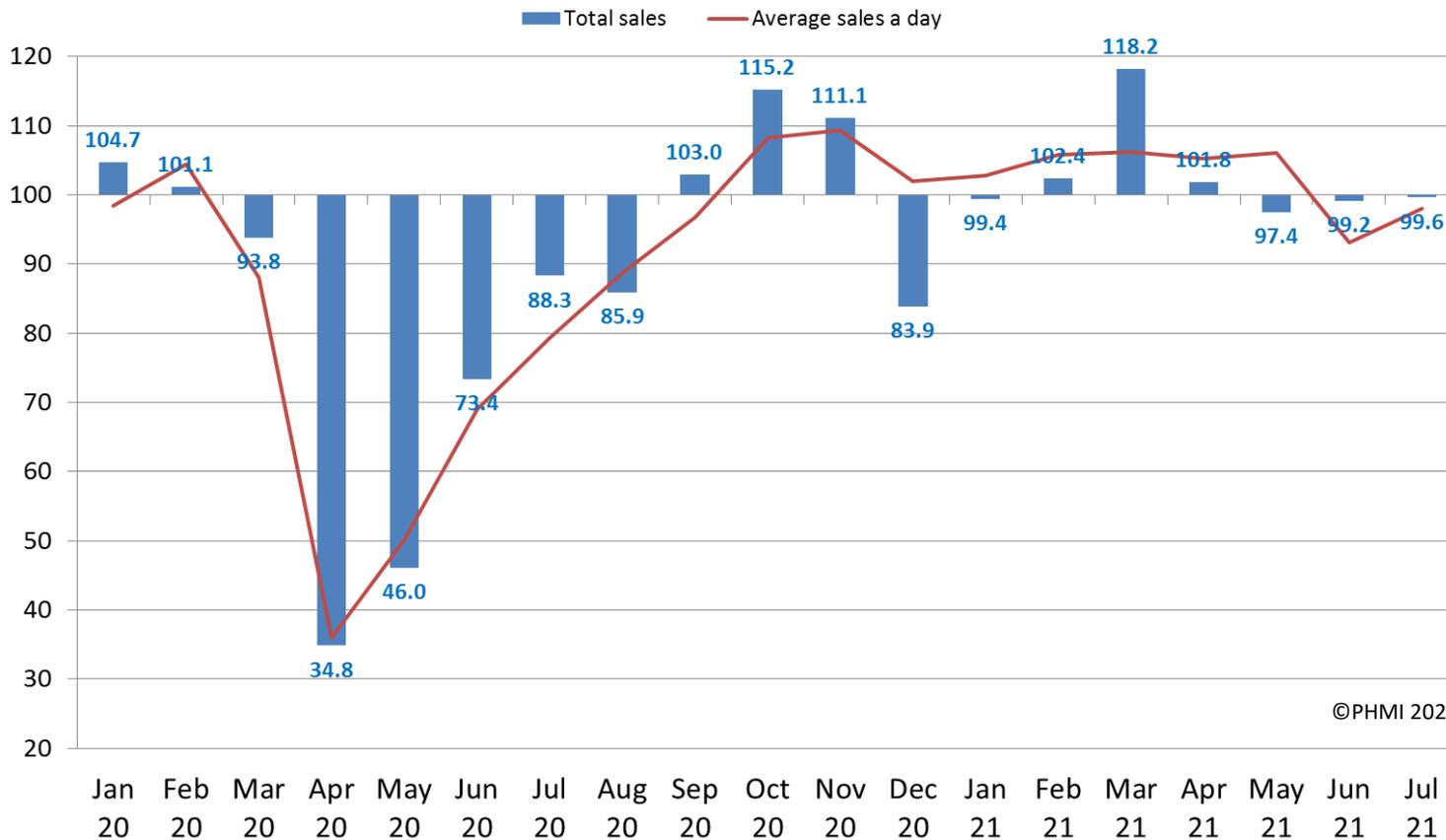
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. July's Index of 99.6 means turnover was 0.4% lower than the base period.

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

# Monthly: Index

Adjusted and unadjusted for trading days\*

## Indices: January 2020 to July 2021



Values shown for Total sales

©PHMI 2021

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

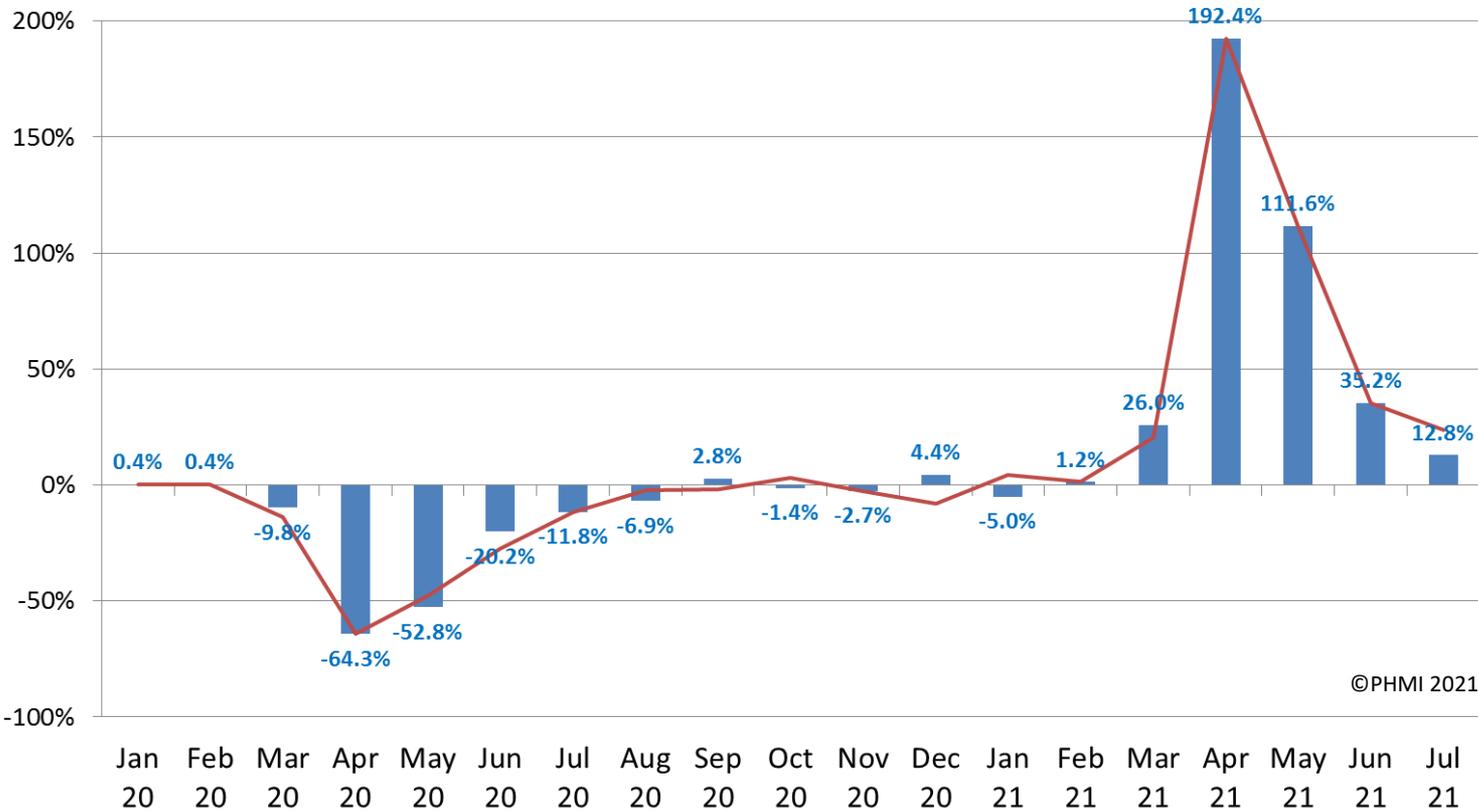
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted for trading days\*

## Month: year on year

■ Total sales — Average sales a day



Values shown for Total sales

©PHMI 2021

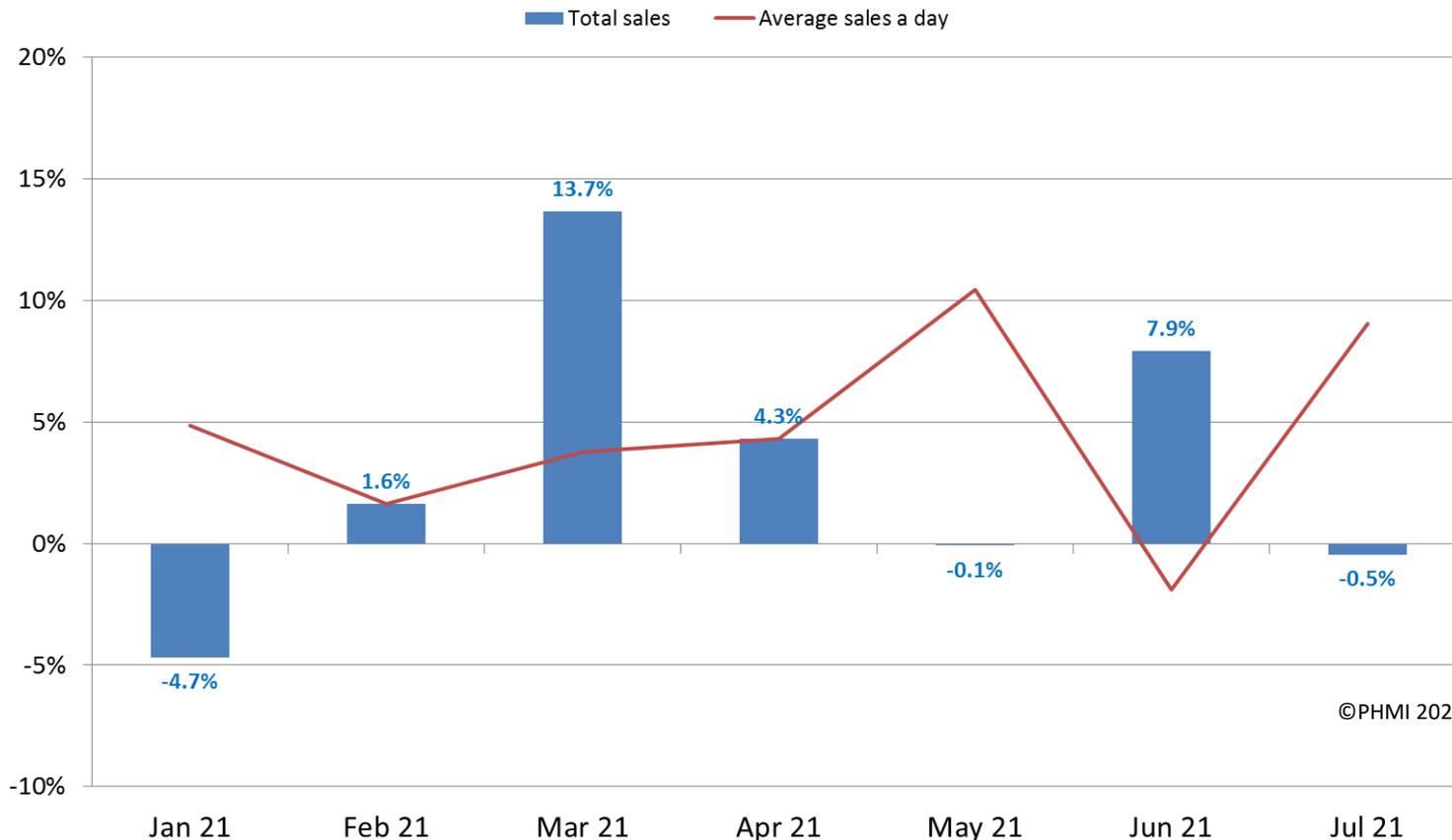
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to July 2021

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

# Monthly: This Year v 2019

Sales indices, adjusted and unadjusted for trading days\*

## Month: compared with 2019



Values shown for Total sales

©PHMI 2021

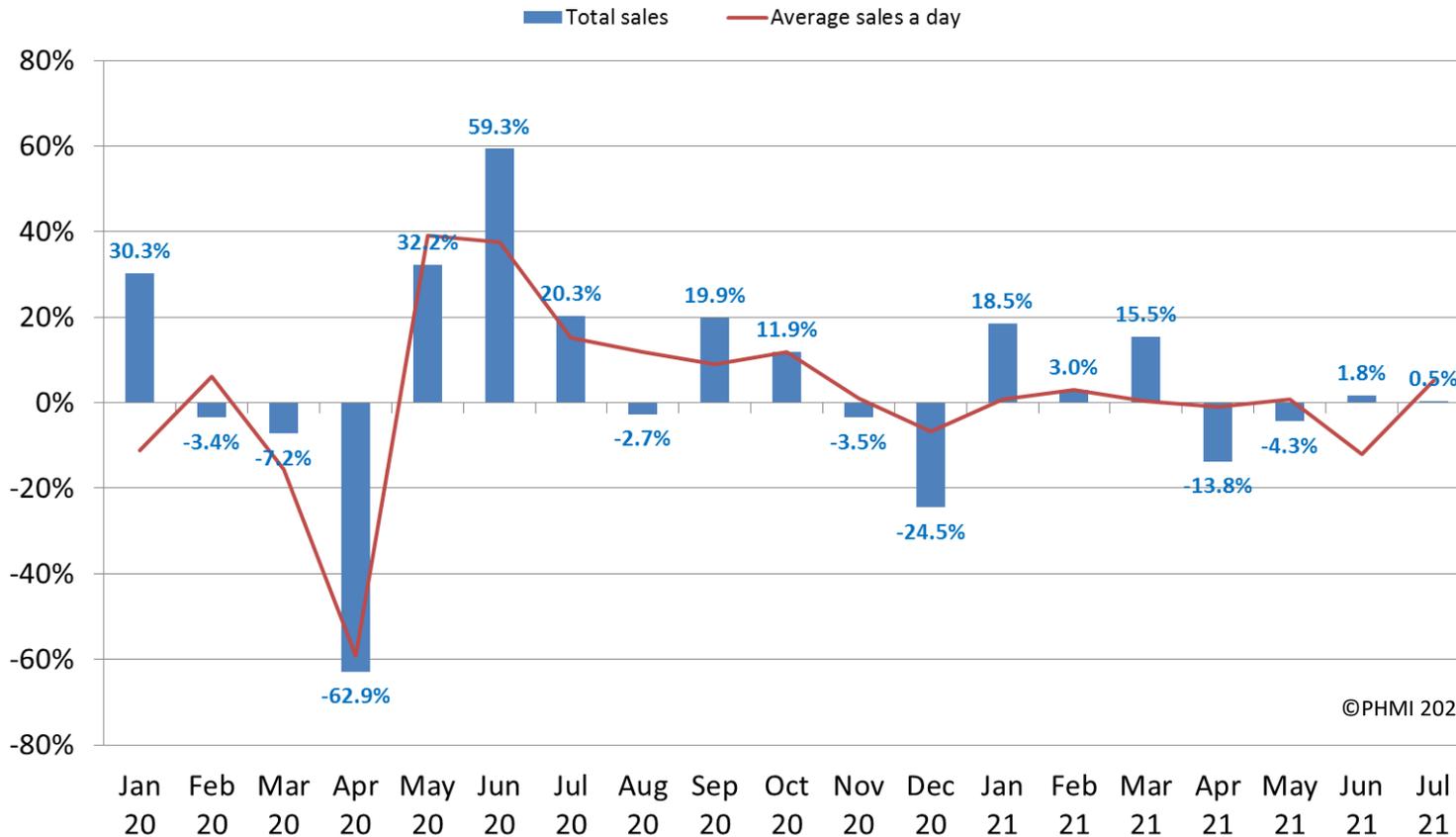
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to July 2021

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

# Monthly: Month v previous month

Sales indices, adjusted and unadjusted for trading days\*

## Month v previous month



Values shown for Total sales

©PHMI 2021

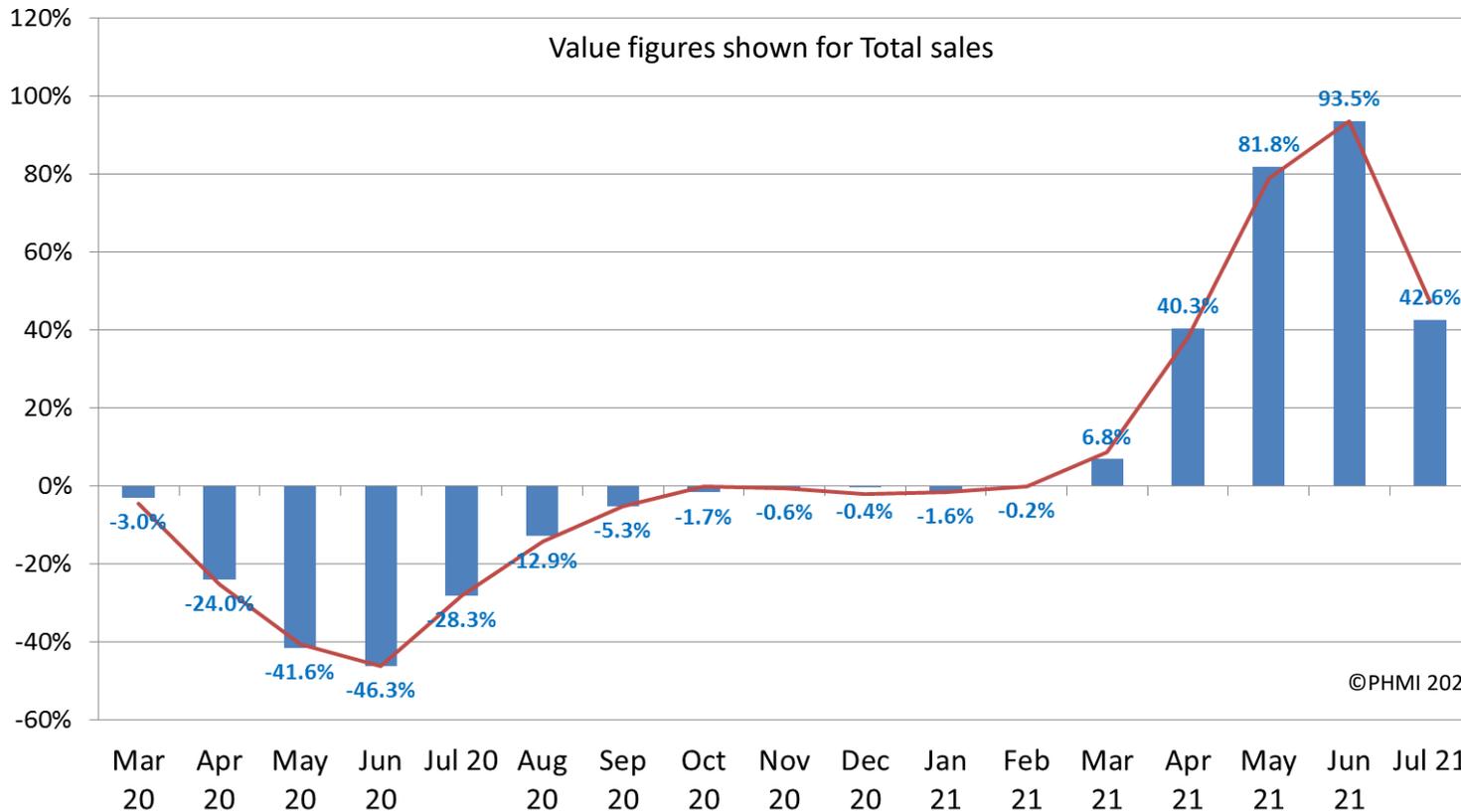
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to July 2021

# 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. July 21 shows sales in the three months May to July were 42.6% higher than the same three months last year.

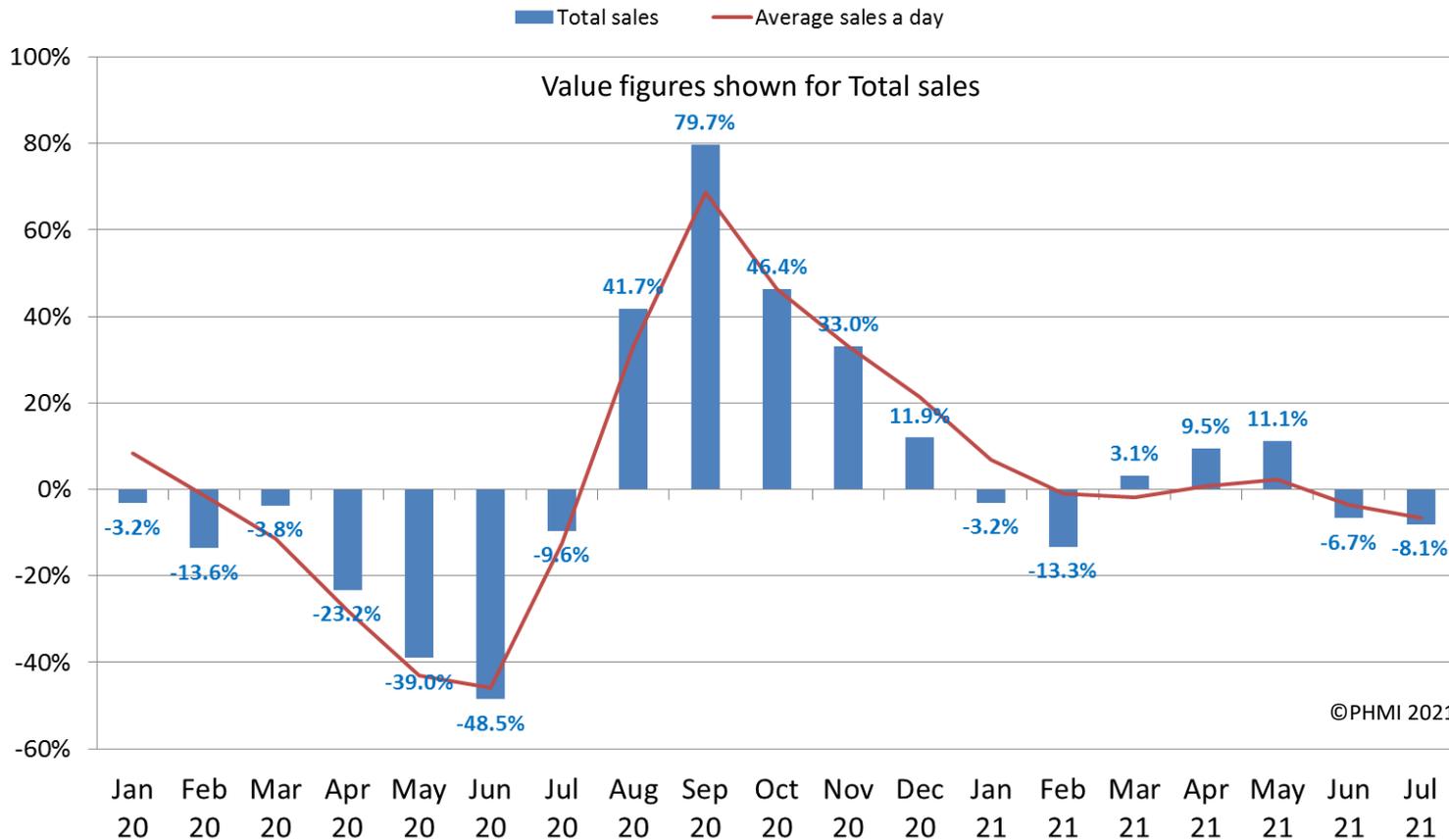
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to July 2021

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

# Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted for trading days\*

## Rolling 3 months v previous 3 months



Eg. July 21 shows the three months May-July were 8.1% lower than the three months February to April

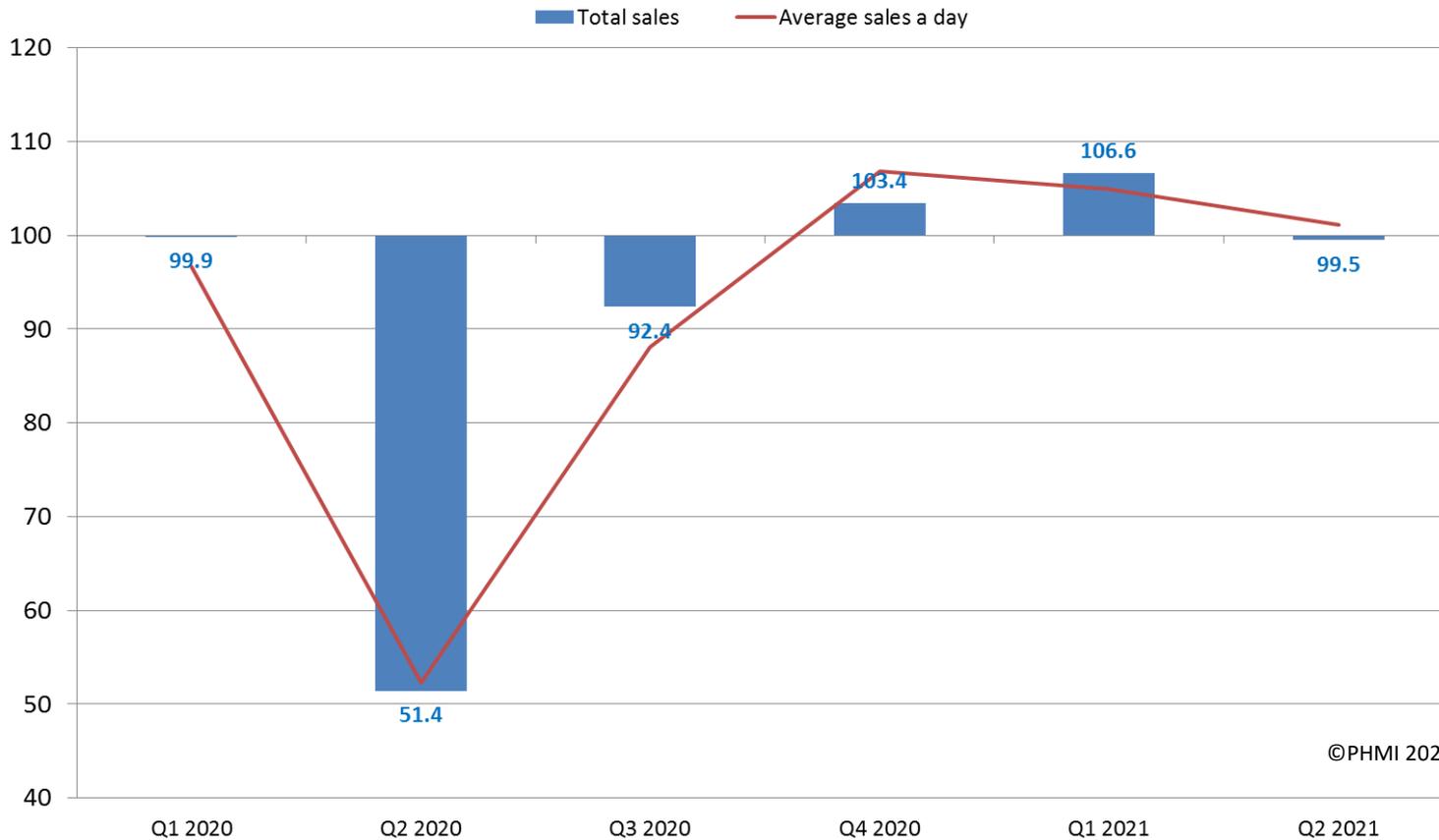
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

# Quarterly: Index

Adjusted and unadjusted for trading days

## Indices: Q1 2020 to Q2 2021



Value figures  
shown for Total  
sales

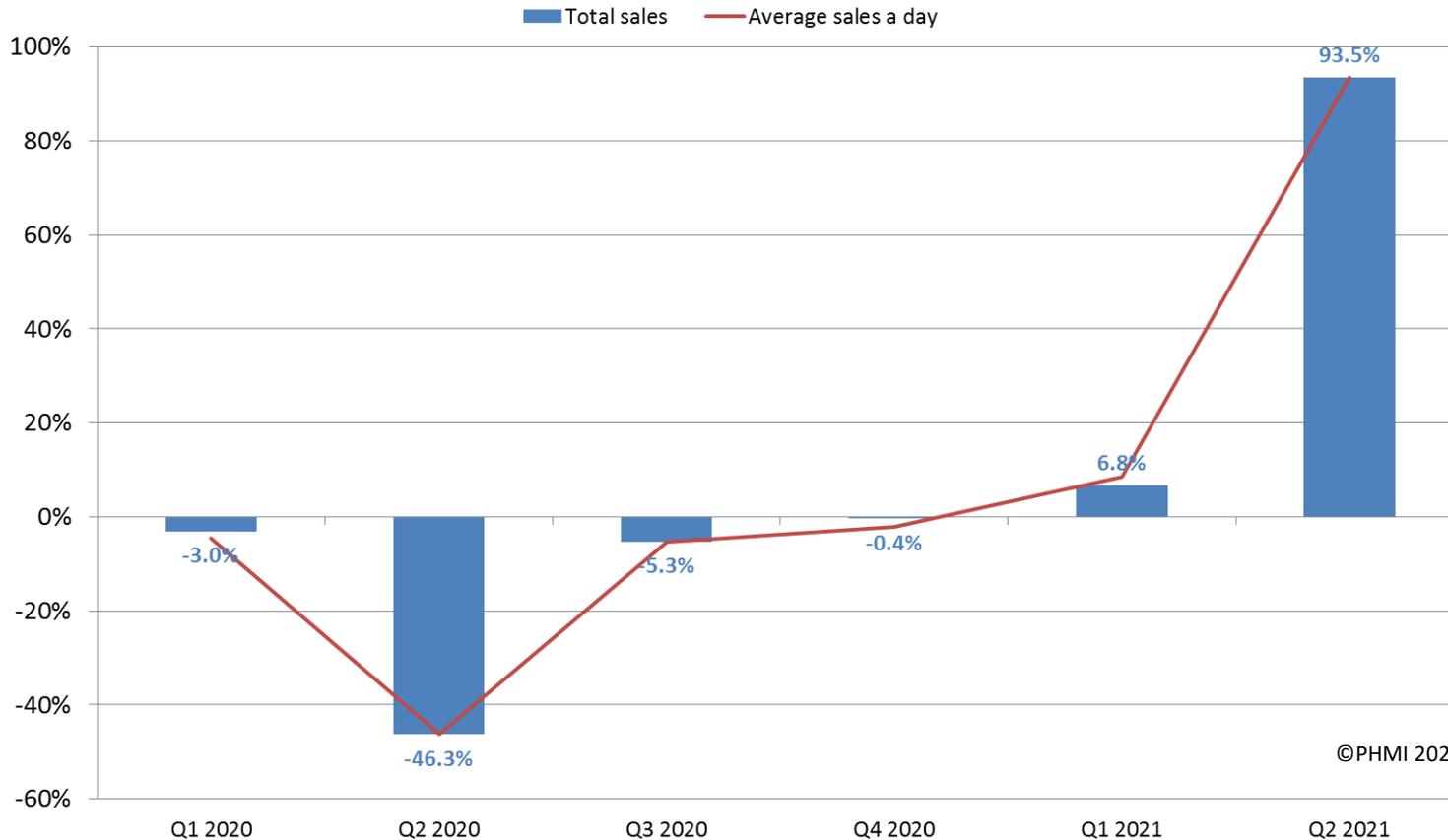
©PHMI 2021

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

# Quarterly: Year on Year

Sales indices, adjusted and unadjusted for trading days\*

## Quarter: year on year



Value figures shown for Total sales

©PHMI 2021

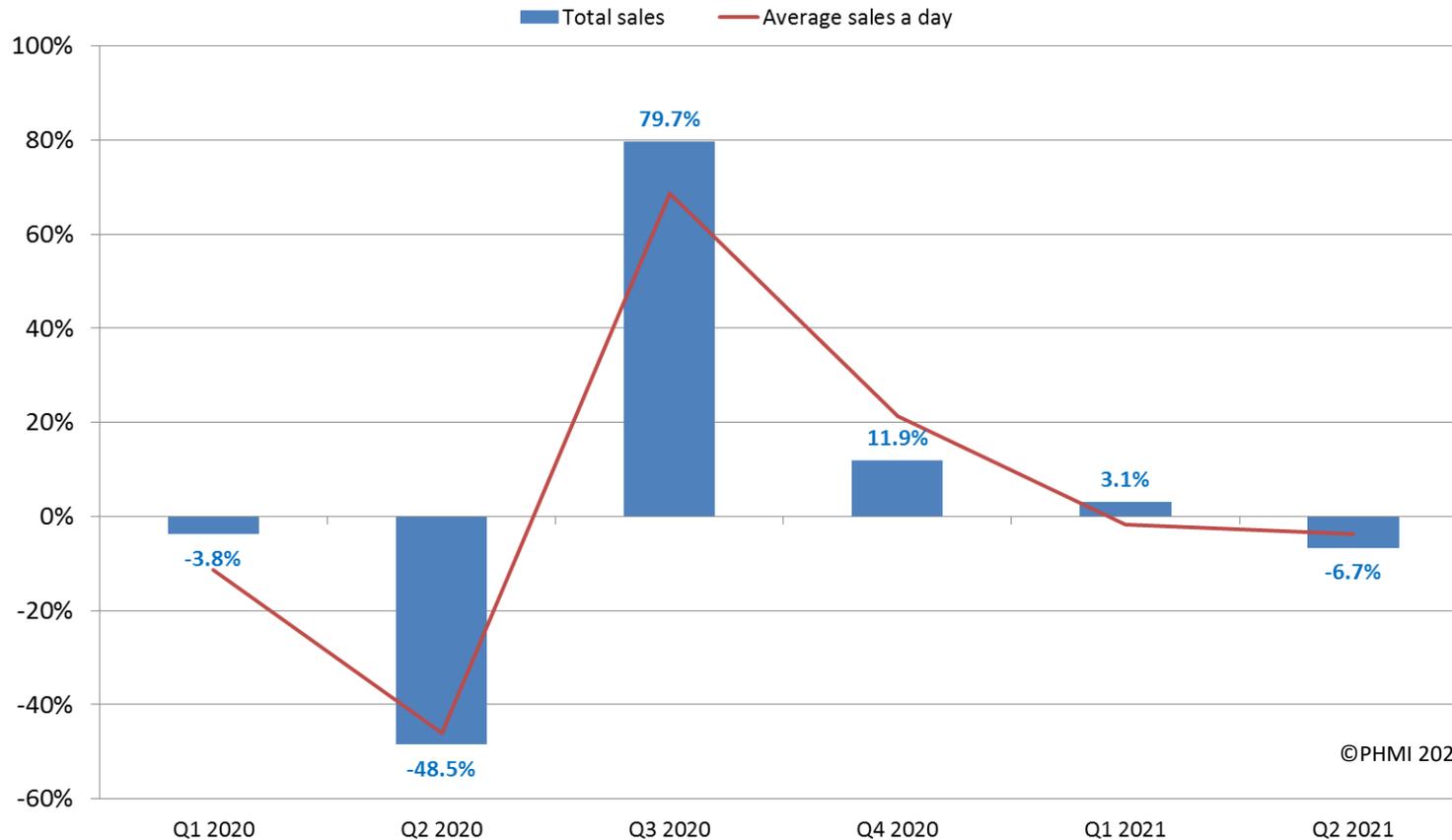
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Jun 2021

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

# Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted  
for trading days\*

## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

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

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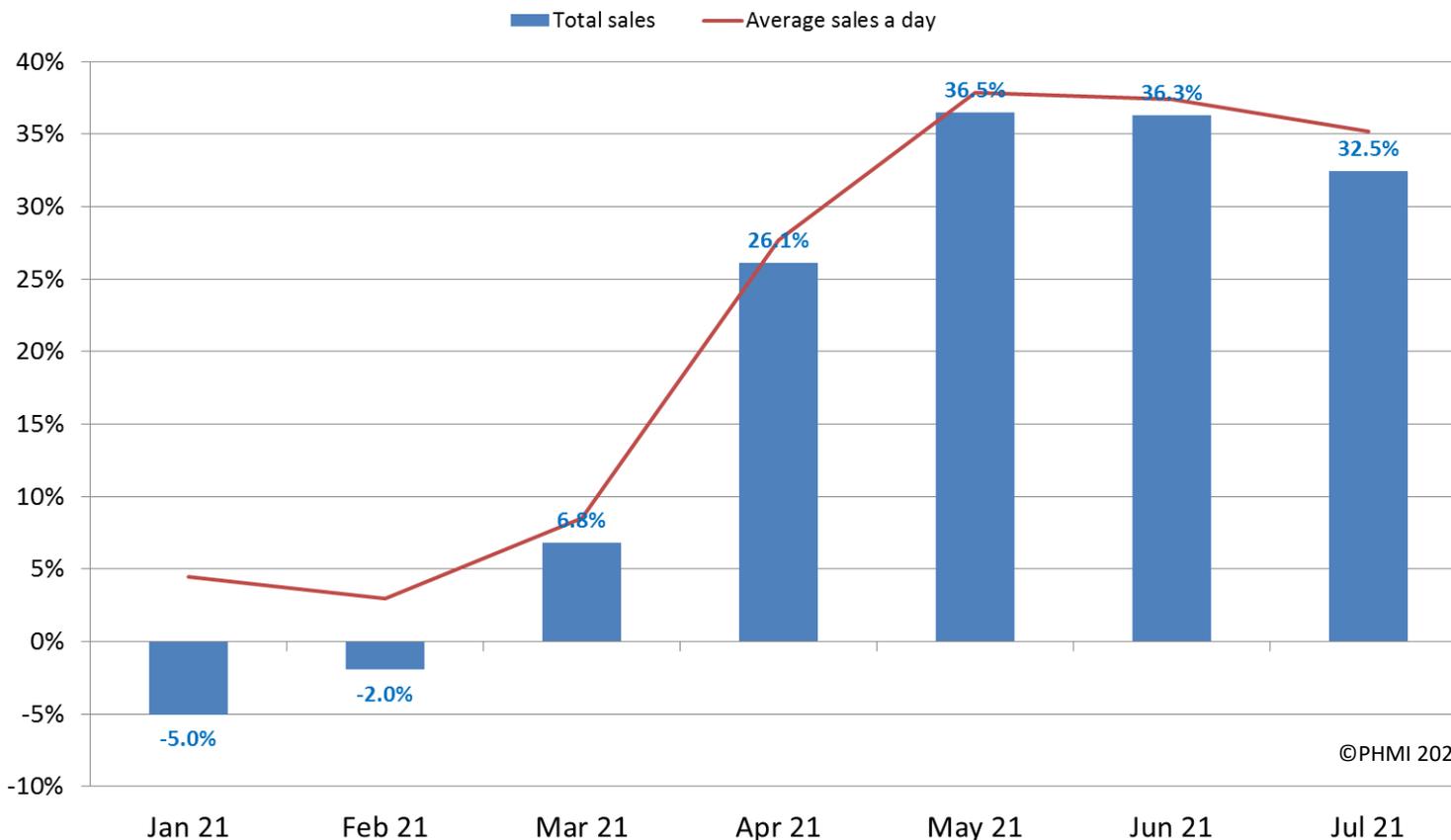
# Year To Date: Year on year

Last 7 months sales indices, adjusted and unadjusted for trading days\*

Plumbing & Heating Merchant Index



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



Value figures shown for Total sales

©PHMI 2021

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

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

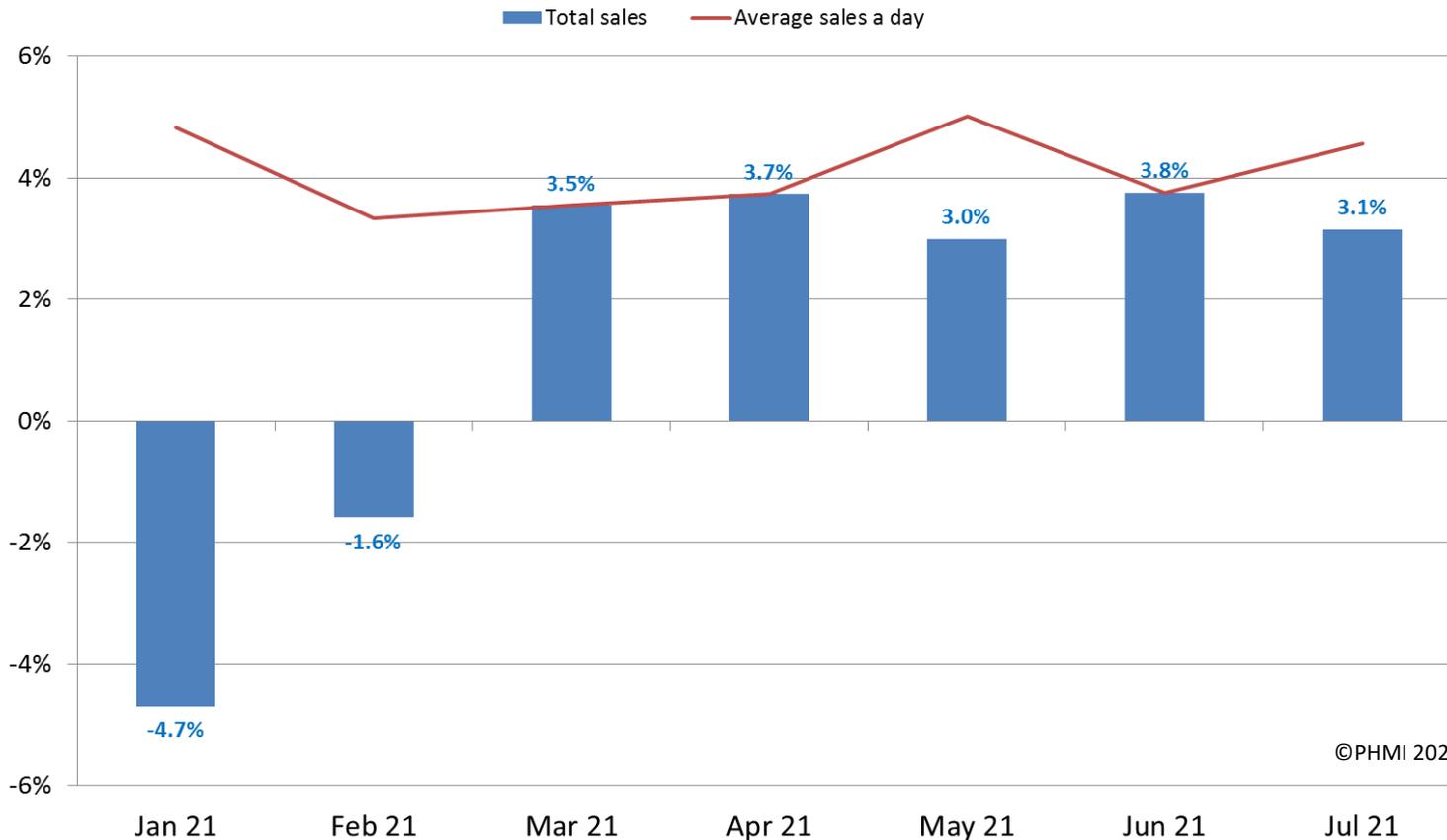
# Year To Date: 2021 v 2019

Last 7 months sales indices, adjusted and unadjusted for trading days

Plumbing & Heating Merchant Index



## Cumulative year to date: 2-year comparison



Value figures shown for Total sales

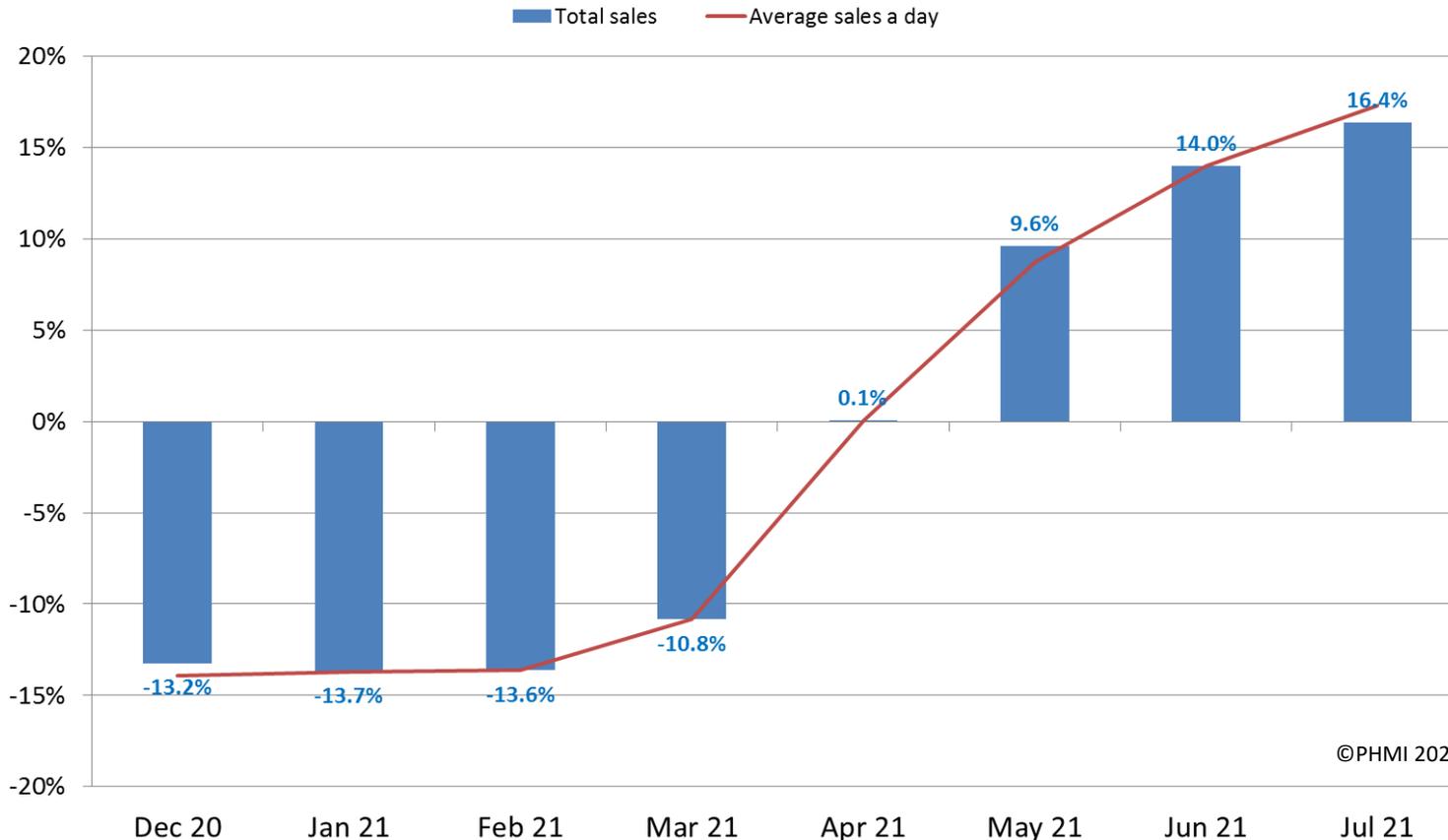
©PHMI 2021

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

# Last 12 months: Year on year

Sales indices, adjusted and unadjusted  
for trading days\*

## Rolling 12 months v previous 12 months



Value figures  
shown for Total  
sales

©PHMI 2021

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

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# 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					

## Quarterly

Index: 62.3

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

## Half Year

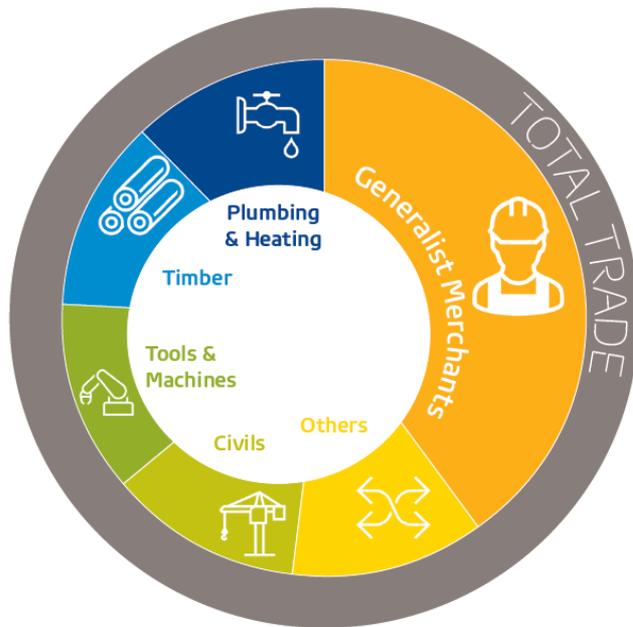
2020	
H1	H2
125	125
2021	
H1	H2
124	

## Full Year

2020
250
2021

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

# Plumbing & Heating channel definition and merchants



## Plumbing Specialists

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

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

## Plumbing Merchants

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

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

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

Merchant partners include:



Plumbing Trade Supplies



# Contacting PHMI

## PHMI Experts

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



**Tom Rigby**

Commercial Manager

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+44 (0) 7392 081276



**Ralph Sutcliffe**

Business Development  
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Trade

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“building **excellence**  
in materials supply”



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in materials supply”

## BMF Forecast Report & BMF Sales Indicators

# BMF Forecast Report

## NEW: Autumn 2021 edition



### Builders Merchants Industry Forecast Report

The BMF will shortly be releasing the eighth edition of its Builders Merchants Industry Forecast, covering Autumn 2021 onwards.

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 nearing completion. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Sarup Ubhi on 024 7685 4994 or email: [sarup.ubhi@bmf.org.uk](mailto:sarup.ubhi@bmf.org.uk)



**Builders Merchants  
Industry Forecast**  
Autumn 2021

Year in Review  
Autumn Edition  
£250

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

# Contact us

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