

“building **excellence**  
in materials supply”

# Builders Merchant Building Index



## Monthly report for July 2022

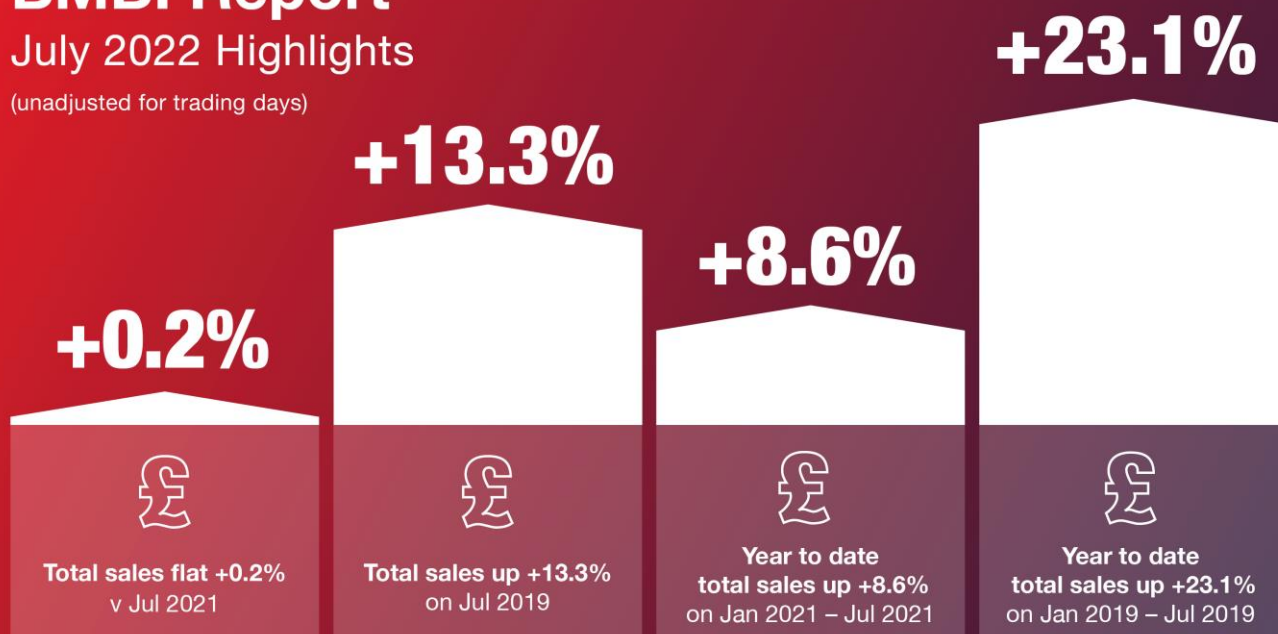
(Published 22 September 2022)

# Highlights

July's value sales were flat +0.2% compared with July 2021 – and compared with pre-Covid July 2019, sales were +13.3% higher. Read the full comment on pages 7 and 8.

## BMBI Report July 2022 Highlights

(unadjusted for trading days)



“ July 2022 sales were flat at +0.2% compared to July 2021, but volume was down (-12.8%) with +15.0% price inflation. ”

Note: As one or two year comparisons are still likely to produce some unusual differences, we are comparing figures with 2019, where possible, to give a pre-Covid three-year comparison

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# Introduction:

## Builders Merchant Building Index



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

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

### Executive Summary

Short of time and just want to read the headlines? Download an Executive Summary that provides a snapshot on value sales and trends from Britain's Builders' Merchants for July 2022 [here](#).

### BMBI Expert Panel

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. **Meet the Experts and read their comments on pages 5 and 6 of this report or read their previous comments [here](#).**

### 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. **Download the latest update [here](#).**



### 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).

# 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 2022 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:



**Gordon Parnell**  
Sales Director British  
Gypsum

[Read latest comment: Q2 2022 Report](#)

### Expert for Bricks & Roof Tiles:



**Kevin Tolson**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q2 2022 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q2 2022 Report](#)

### Expert for Civils & Green Infrastructure:



**Clark McAllister**  
Sales Director Polypipe Civils &  
Green Urbanisation

[Read latest Comment: Q2 2022 Report](#)

### Expert for Lead:



**Kyle Hazeldine**  
Sales & Marketing Manager  
Midland Lead

[Read latest Comment: Q2 2022 Report](#)

### Expert for Wood-Based Panels:



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

[Read latest Comment: Q2 2022 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q2 2022 Report](#)

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



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

[Read latest Comment: Q2 2022 Report](#)

### Expert for Shower Enclosures and Showering:



**Darren Bedford**  
Sales Director  
Lakes

[Read latest Comment: Q2 2022 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q2 2022 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q2 2022 Report](#)

### Expert for Paint:



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

[Read latest Comment: Q2 2022 Report](#)

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



**Andy Scothern**  
Managing Director  
eCommonSense

[Read latest Comment: Q2 2022 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q2 2022 Report](#)

### Expert for Adhesives & Sealants:



**Mathew Whitehouse**  
Marketing Director  
Bostik UK

[Read latest Comment: Q2 2022 Report](#)



# Overview - 1

## July sales flat YoY, with volume down -12.8% and +15.0% price inflation

Total Builders Merchants value sales were flat (+0.2%) in July 2022 compared July last year. Volume sales were -12.8% lower with price up +15.0%. There was no difference in trading days. Ten of the twelve categories sold more. Nine categories performed better than Merchants overall, including Renewables & Water Saving (+25.5%) Workwear & Safetywear (+20.2%), Kitchens & Bathrooms (+13.1%) and Plumbing, Heating & Electrical (+10.7%). Landscaping (-4.6%) and Timber & Joinery Products (-14.4%) sold less.

### July 2022 v July 2019

Total value sales in July 2022 were +13.3% up on the same month three years ago (a more normal year pre Covid). Volume sales fell -13.9% - prices rose +31.6%. With two less trading days this year, like-for-like sales (which take trading day differences into account) were up +24.1%. Three of the twelve categories sold more than merchants overall. Timber & Joinery Products (+23.8%), Renewables & Water Saving (+18.6%) and Landscaping (+17.7%) did best. Other categories grew more slowly, including Heavy Building Materials (+12.3%), Kitchens & Bathrooms (+11.3%) and Plumbing, Heating & Electrical (+2.9%). Miscellaneous (-4.5%) was weakest.

### July 2022 v June 2022

Total Merchants sales were -2.6% lower in July 2022 than in June 2022. Volume sales were -5.2% down with price up +2.7%. With one more trading day like-for-like sales were -7.3% down this month. Renewables & Water Saving (+4.8%) grew most. Landscaping (-9.1%) was weakest.

### July Index

July's overall BMBI index was 151.5, particularly helped by Landscaping (195.5) and Timber & Joinery Products (171.0), with no difference in trading days. Almost all categories recorded indices exceeding 100, including Heavy Building Materials (147.0), Kitchens & Bathrooms (143.1) and Ironmongery (135.3). Only Renewables & Water Saving (90.4) fell below 100.

### Last three months, year on year

Total sales in May to July 2022 were +4.4% higher than in May to July 2021, with price inflation of +16.5%, volume down -10.4%, and no difference in trading days. Ten of the twelve categories sold more than merchants overall. Renewables & Water Saving (+20.0%), Kitchens & Bathrooms (+17.4%) and Workwear & Safetywear (+14.4%) did best. Timber & Joinery Products (-7.2%) was weakest.

### Last three months v 3 years ago

Compared with the same months three years ago (May to July 2019), May to July 2022 sales were ahead +22.4%, driven by price (+30.0%) not volume (-5.8%). With two less trading days this period like-for-like sales were +26.4% ahead. All categories sold more. Two categories stood out: Timber & Joinery Products (+33.4%) and Landscaping (+31.3%). Heavy Building Materials (+20.5%), Kitchens & Bathrooms (+19.0%), and Plumbing, Heating & Electrical (+10.7%) grew less. Tools (+3.6%) was weakest.

**Builders' Merchant  
July value sales were  
flat at +0.2%  
compared to last  
year. Prices  
increased +15.0%,  
volume fell -12.8%.**

Overview continues on the next page...

# Overview - 2

... continued from the previous page:

## **Last three months v previous three months**

Total sales in May to July 2022 were +4.2% up on the previous three months, February to April 2022, driven more by price inflation (+2.5%) than volume (+1.6%), with no difference in trading days. Ten of the twelve categories sold more. Landscaping (+8.8%) and Heavy Building Materials (+7.3%) did better than merchants overall. Decorating (+3.9%), Kitchens & Bathrooms (+2.2%) and Ironmongery (+1.2%) grew less. Plumbing, Heating & Electrical (-8.6%) was weakest.

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

The current year to date, January to July 2022, was +8.6% higher than January to July 2021. Volume sales were -6.7% lower with price up +16.3%. With one less trading day this year like-for-like sales were +9.3% higher. All categories sold more. Kitchens & Bathrooms (+20.8%) was strongest followed by Renewables & Water Saving (+20.7%). Plumbing, Heating & Electrical (+12.7%) Heavy Building Materials (+12.0%) and Decorating (+9.3%) grew more than merchants overall. Landscaping (+0.5%) was weakest.

## **Year to date v 2019**

Sales in the current year to date, January to July 2022 were +23.1% ahead of three years ago - January to July 2019. Price inflation was +26.7%, and volume was down -2.8%. With three less trading days in the most recent period like-for-like sales were +25.7% higher. All categories sold more. Landscaping (+39.4%), Timber & Joinery Products (+36.4%) and Renewables & Water Saving (+28.4%) performed better than Merchants overall. Tools (+4.9%) was weakest.

## **MAT**

Total Merchants sales in August 2021 to July 2022 were +11.5% higher than in August 2020 to July 2021, with price inflation of (+16.5%), and volume (-4.2%). No difference in trading days. All categories sold more. Renewables & Water Saving (+17.2%) grew most. Kitchens & Bathrooms (+16.6%), Timber & Joinery Products (+14.8%), Heavy Building Materials and Plumbing, Heating & Electrical (both +11.9%) also did well. Workwear & Safetywear (+2.8%) was weakest.

## **3-year MAT**

Total Merchants sales in August 2021 to July 2022 were +20.4% higher than in the 12 months August 2018 to July 2019. With two less trading days in the most recent period like-for-like sales were +21.3% higher. Eleven of the twelve categories sold more with Timber & Joinery Products (+39.1%) and Landscaping (+36.1%) well out in front. Other categories saw lower growth including Heavy Building Materials (+14.7%), Kitchens & Bathrooms (+13.9%) and Plumbing, Heating & Electrical (+6.0%). Tools (-1.5%) was weakest.

Total value sales from January to July 2022 were +23.1% higher compared with a more normal year (pre-Covid), January to July 2019.

With price inflation of +26.7%, volume was -2.8% down.



# Monthly: This year v last year

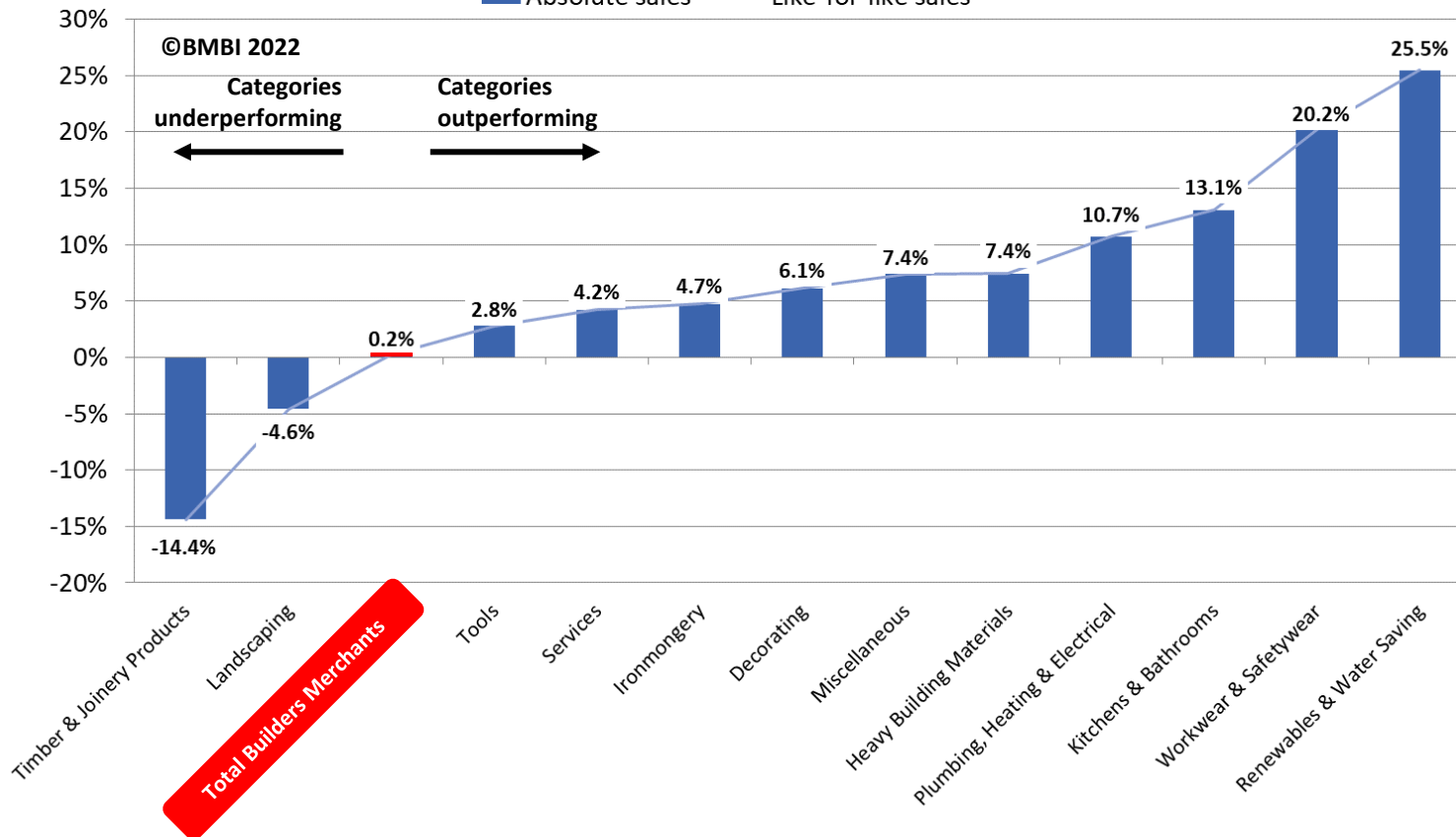
## July 2022 sales

No difference in trading days this year. Like-for-like sales take trading day differences into account.



### July 2022 v July 2021

Absolute sales    Like-for-like sales



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

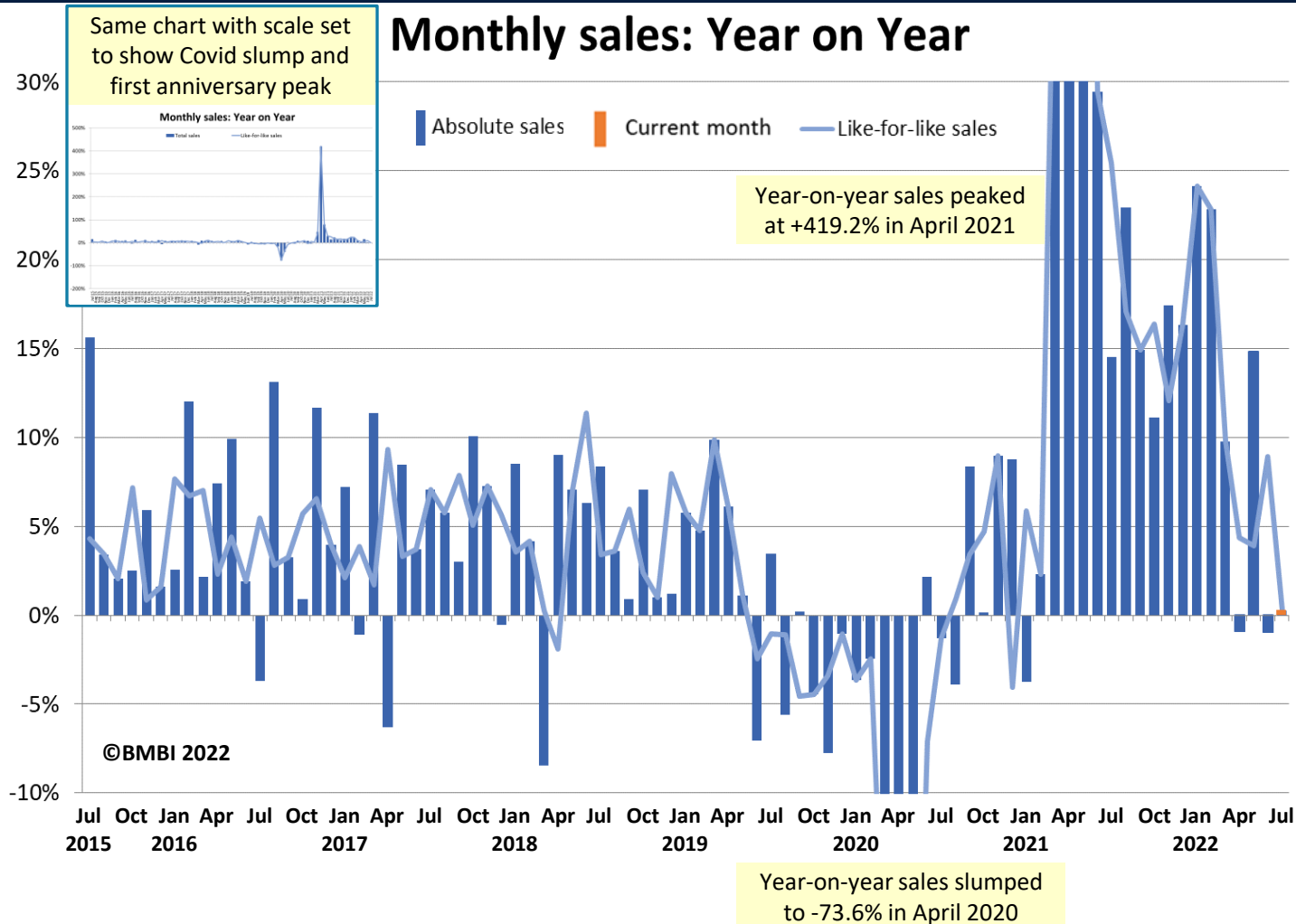
Values shown for  
absolute sales

Total Builders Merchants value sales were flat (+0.2%). Ten of the twelve categories sold more.

# Monthly: Year on Year

## Absolute and Like-for-like sales

No difference in trading days this year. Like-for-like sales take trading day differences into account.



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Sales growth in July  
(+0.2%) was flat  
compared to the  
same month last  
year.

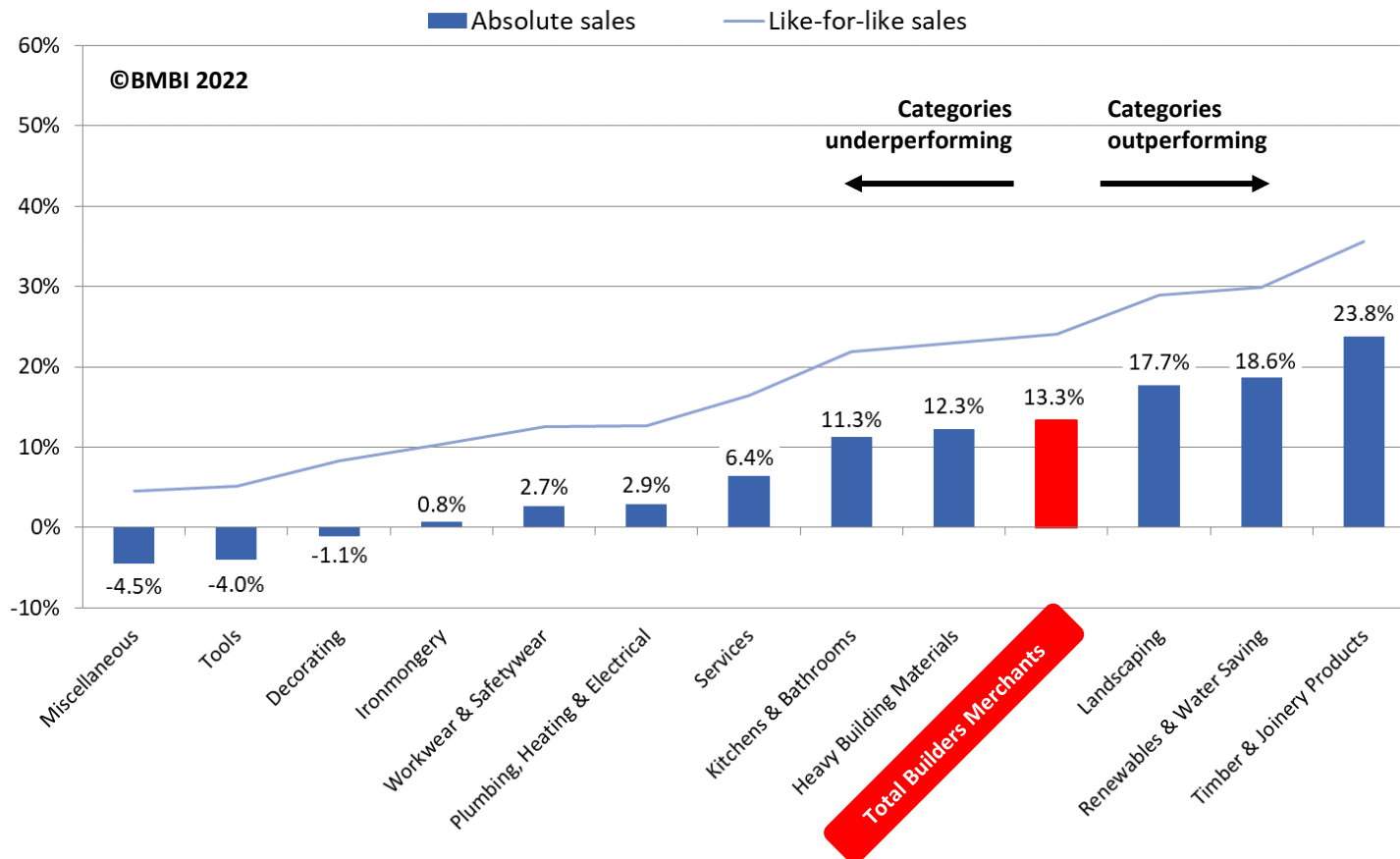
# Monthly: This year v 2019

## July 2022 3-year sales

Two less trading days this year. Like-for-like sales take trading day differences into account.



### 3-year comparison: July 2022 v July 2019



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Three of the twelve  
categories sold more  
than Merchants  
overall, led by  
Timber & Joinery  
Products (+23.8%).

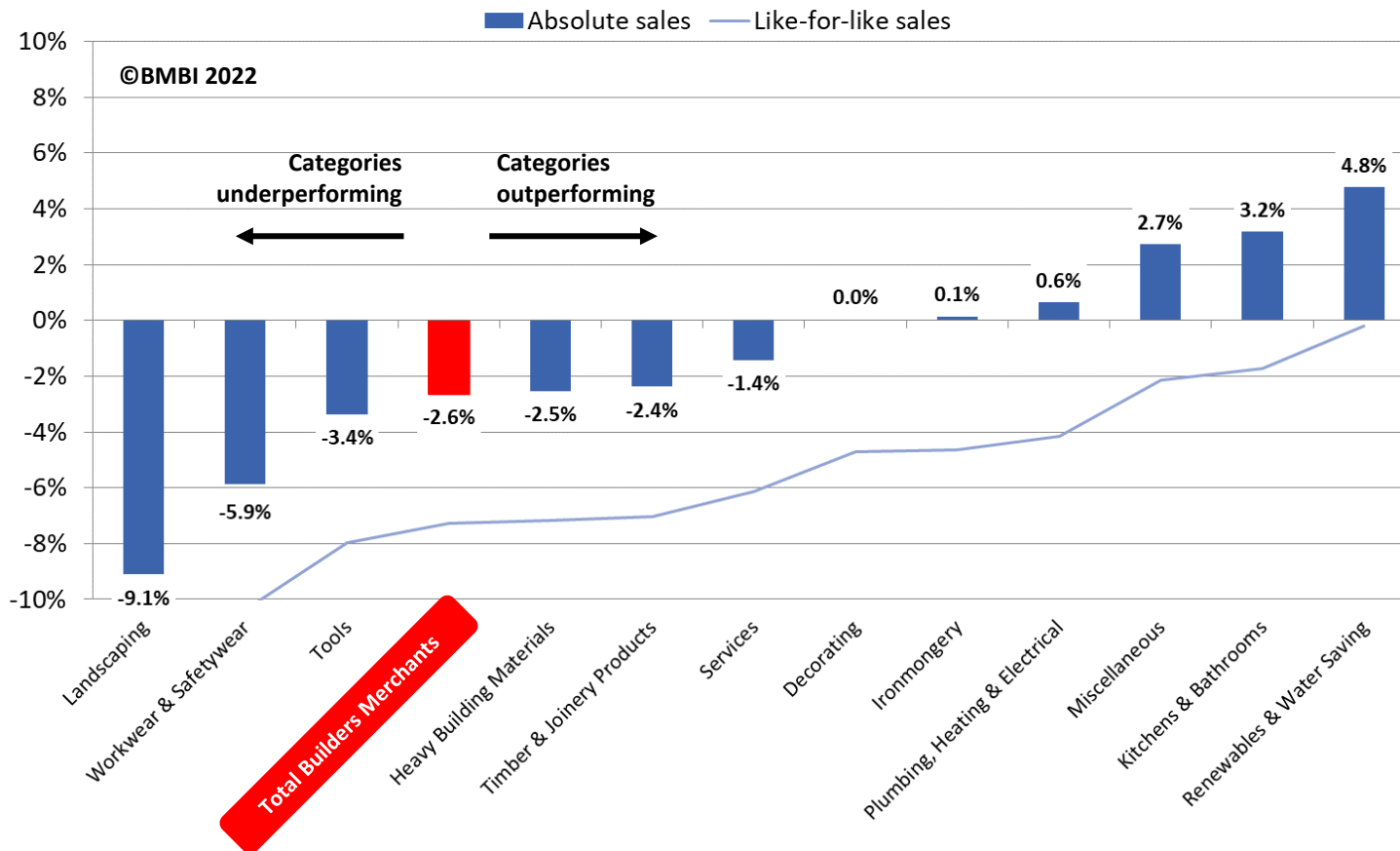
# Monthly: This month v last month

## July 2022 sales

One more trading day this month. Like-for-like sales take trading day differences into account.



### July 2022 v June 2022



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Total July sales were -2.6% lower than in June despite having one more trading day. Like-for-like sales were -7.3% lower.

# Latest 3 months: v last year

## May 2022 to July 2022 sales

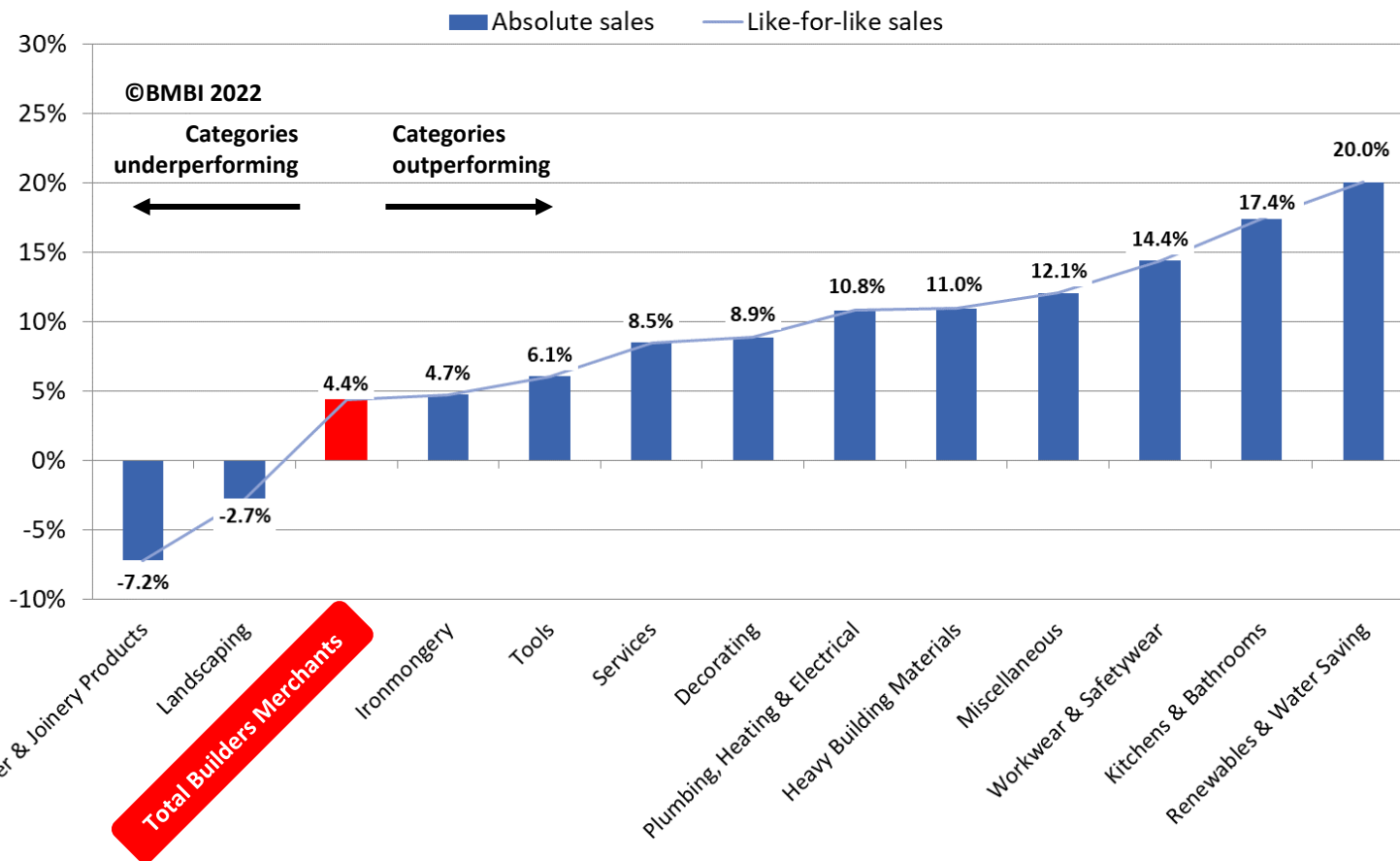
No difference in trading days this year. Like-for-like sales take trading day differences into account.



### 3 months May 22 to Jul 22 v 3 months May 21 to Jul 21

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales



Sales in the last three months were 4.4% higher than in the same period last year. Renewables & Water Saving (+20.0%) grew fastest.

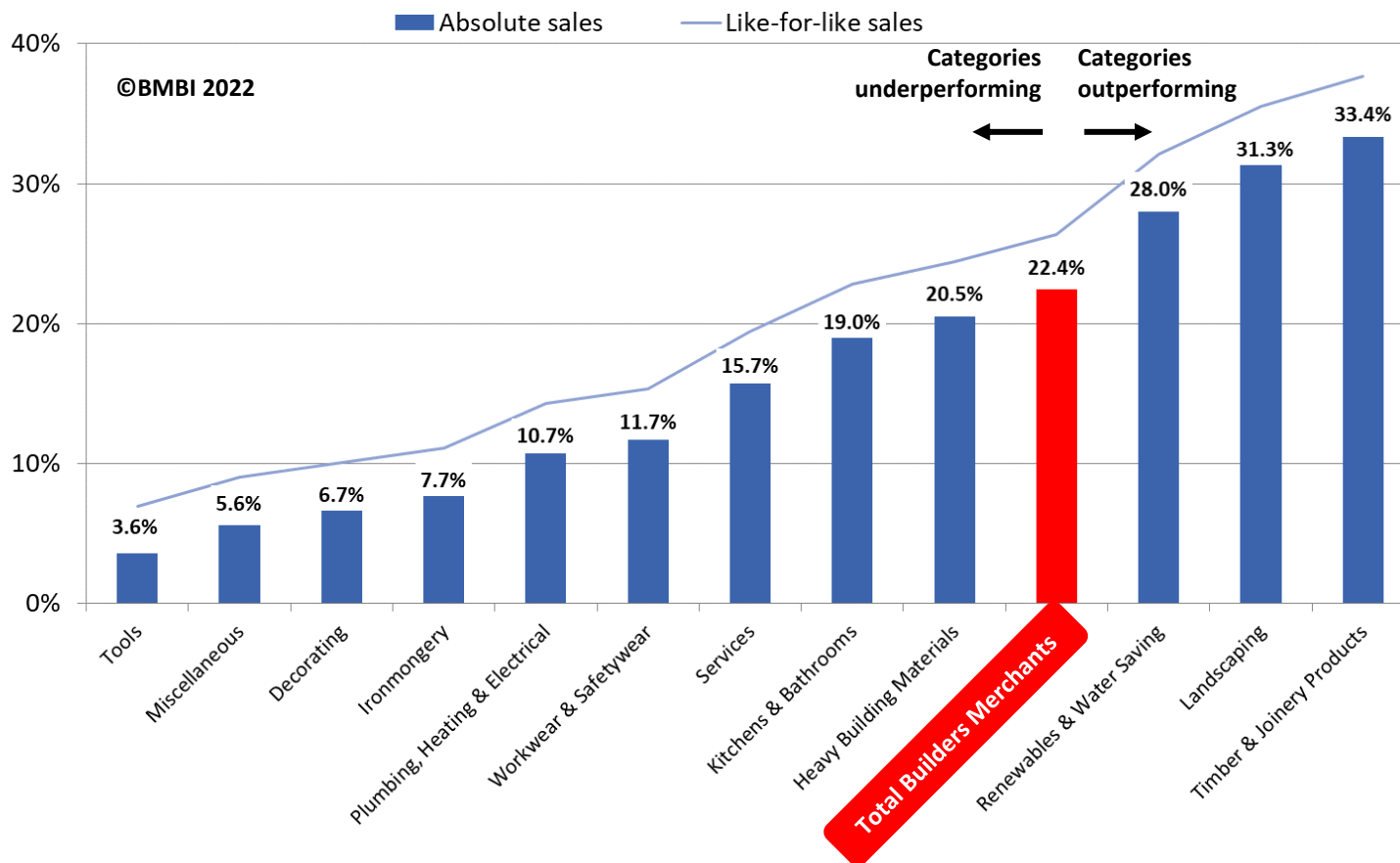
# Latest 3 months: v 2019

## May 2022 to July 2022 3-year sales

Two less trading days this year. Like-for-like sales take trading day differences into account.



### 3-year comparison: May 22 to Jul 22 v May 19 to Jul 19



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Compared with the same months three years ago, sales in May to July 2022 were +22.4% higher than in May to July 2019. All categories sold more. Timber & Joinery Products (+33.4%) was strongest.



# Latest 3 months: v previous 3 months

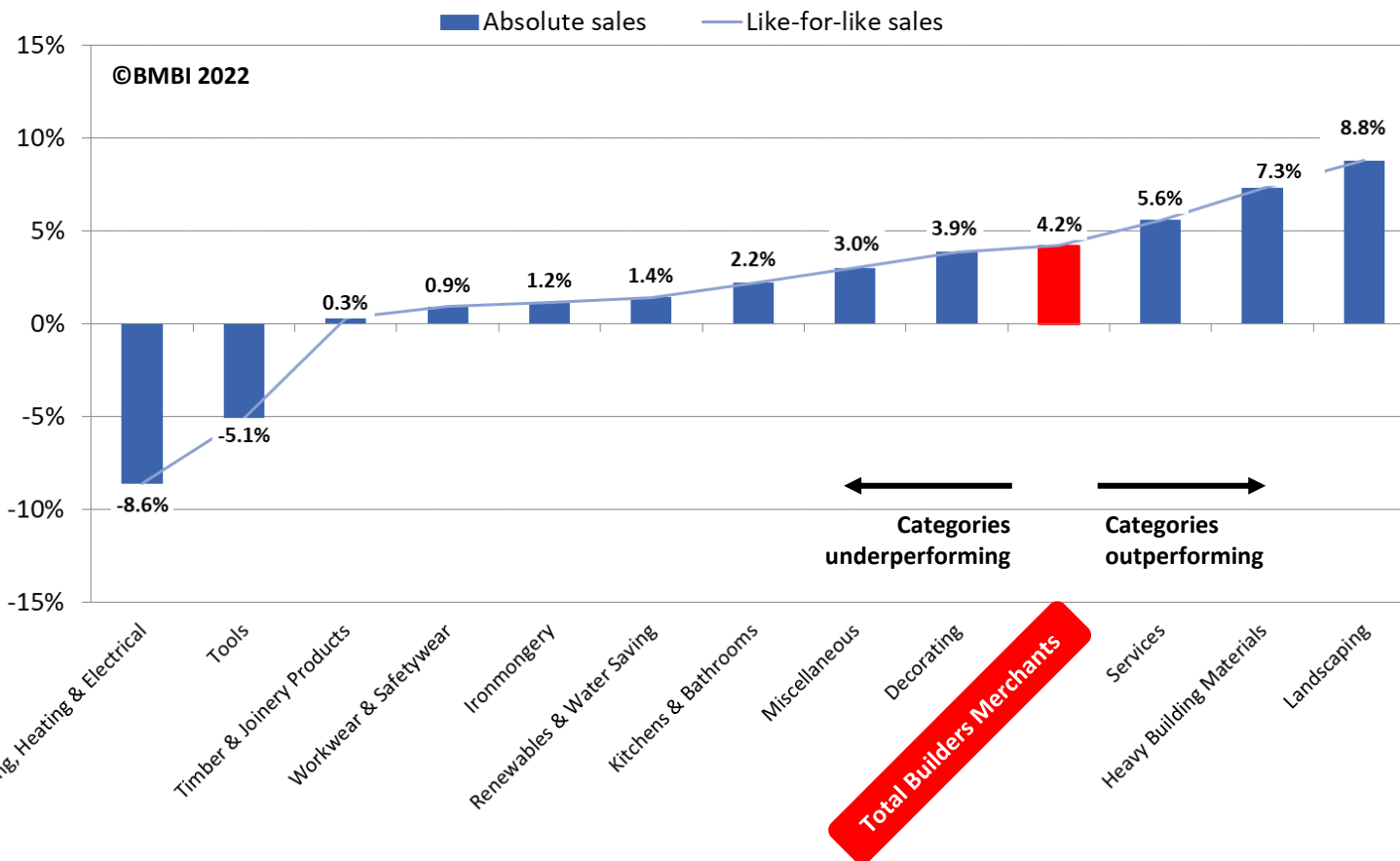
May 2022 to July 2022 sales

No difference in trading days. Like-for-like sales take trading day differences into account.

Builders Merchant  
Building Index



## 3 months May 22 to Jul 22 v 3 months Feb 22 to Apr 22



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Total sales in the last three months were +4.2% higher than in the previous three months, led by seasonal category Landscaping (+8.8%).

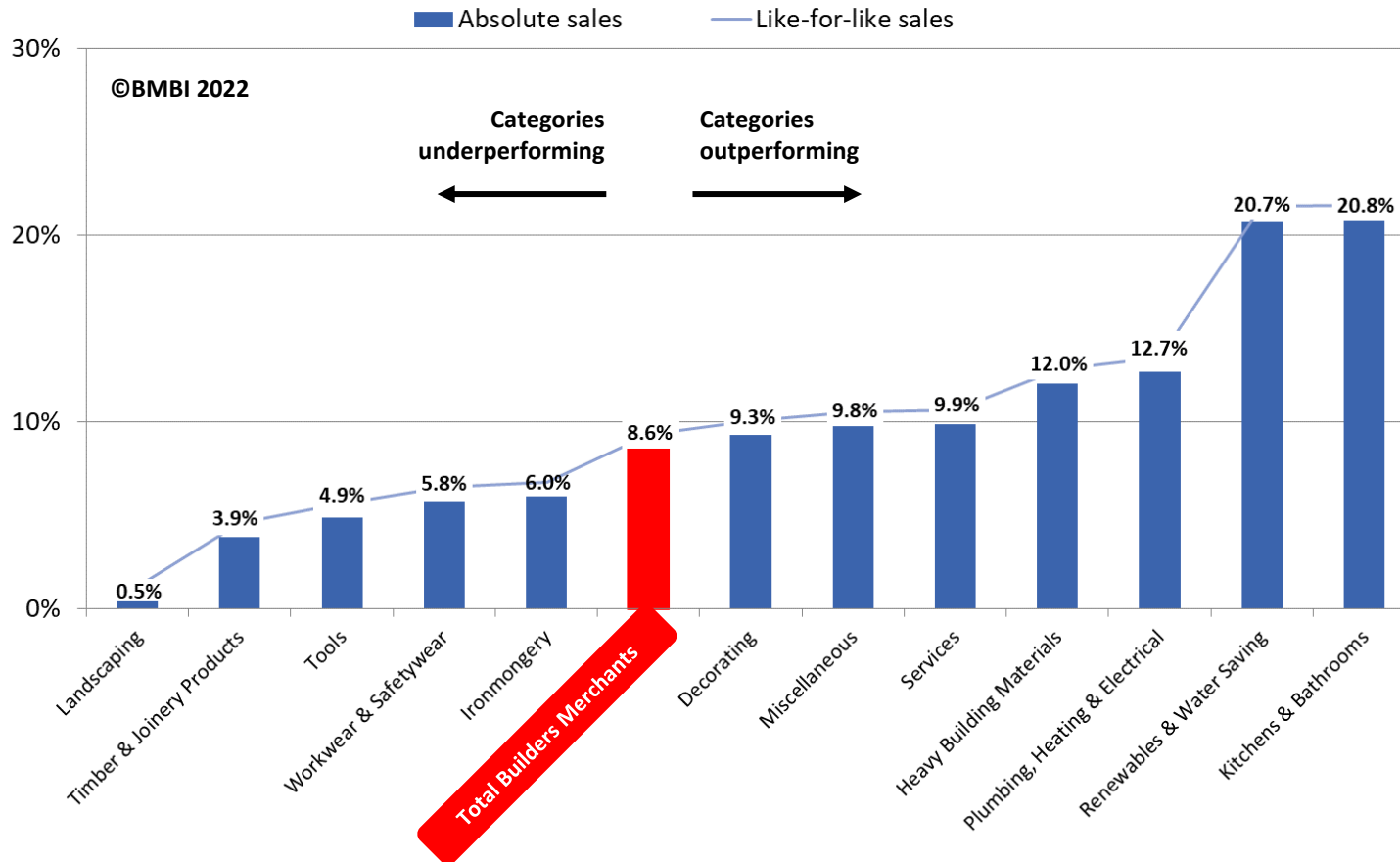
# Year to date: v 2021

## Last 7 months absolute and like-for-like sales

One less trading day this year. Like-for-like sales take trading day differences into account.



### Year to date: Jan 22 to Jul 22 v Jan 21 v Jul 21



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

All categories sold more. Seven categories performed better than Merchants overall. Kitchens & Bathrooms (+20.8%) was strongest closely followed by Renewables & Water Saving (+20.7%).

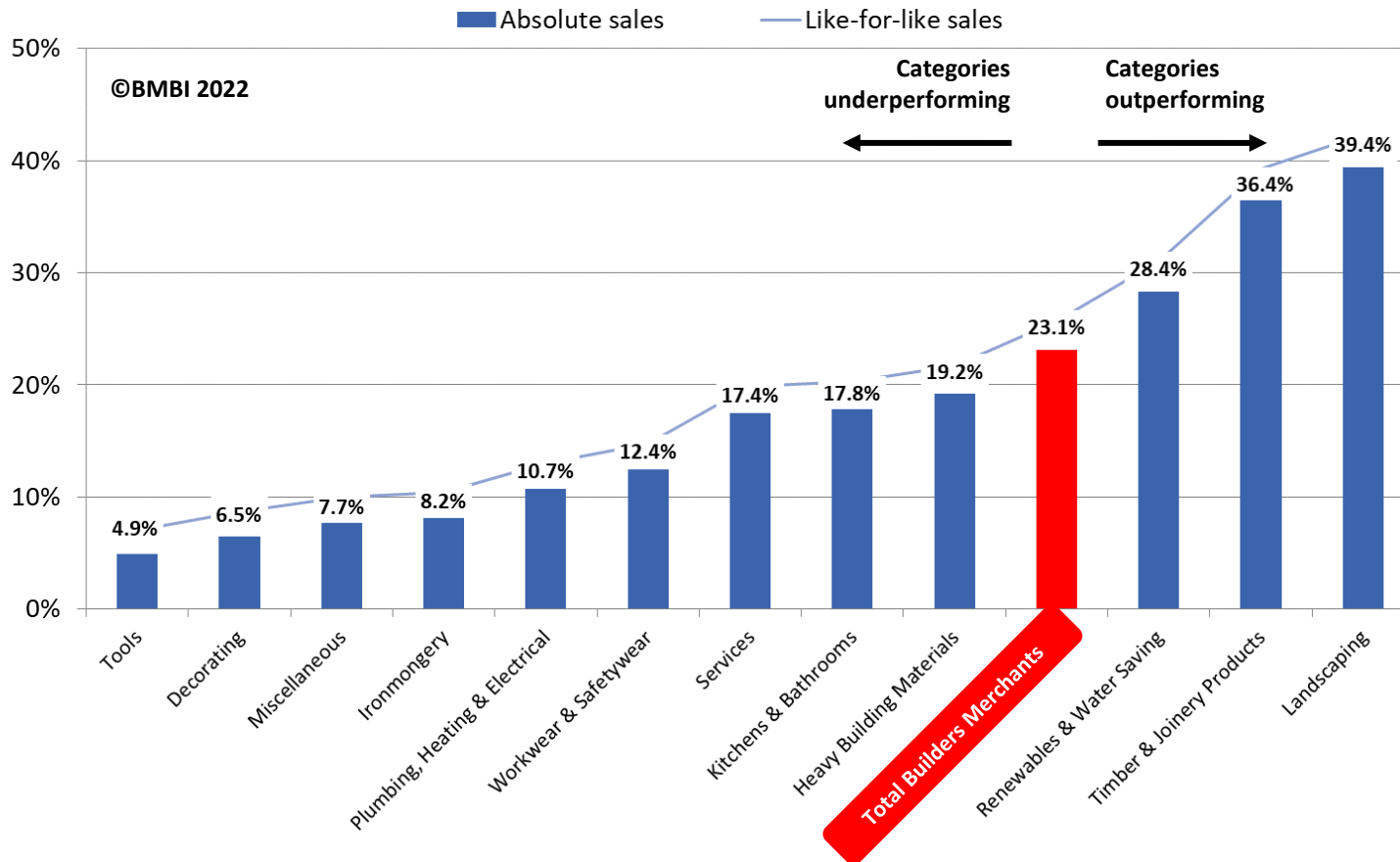
# Year to date: v 2019

## Last 7 months absolute and like-for-like sales

Three less trading days this year. Like-for-like sales take trading day differences into account.



### 3-year comparison: Jan 22 to Jul 22 v Jan 19 to Jul 19



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Sales in the last seven months were +23.1% higher than the same period three years ago. All categories sold more. Landscaping (+39.4%) was strongest.

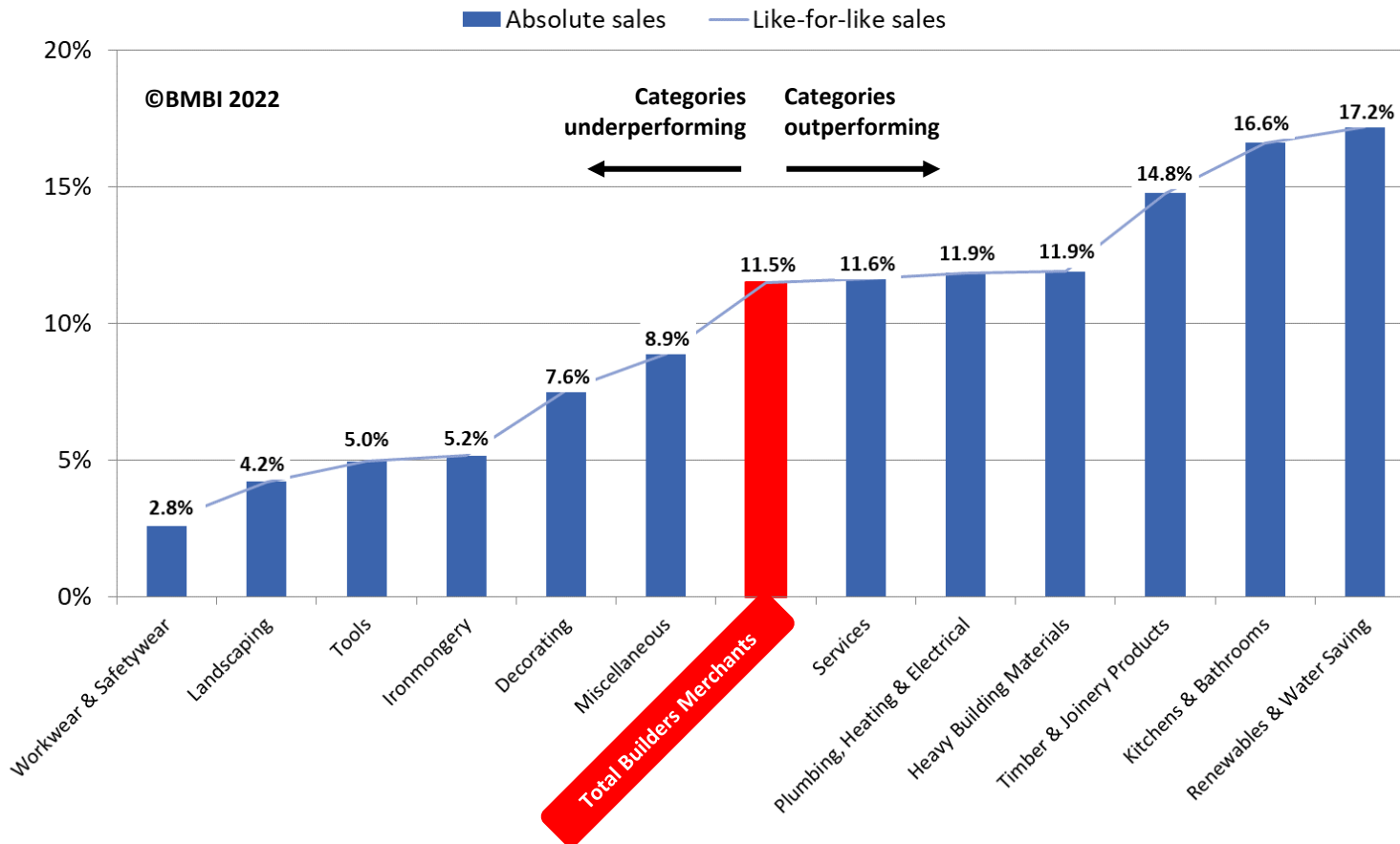
# Last 12 Months: Year on Year

## Absolute and like-for-like sales

No difference in trading days. Like-for-like sales take trading day differences into account.



## 12 months Aug 21 to Jul 22 v 12 months Aug 20 to Jul 21



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Sales in the twelve months to July 2022 were +11.5% higher than Covid-affected August 2020 to July 2021. All categories sold more. Renewables & Water Saving (+17.2%) performed best.

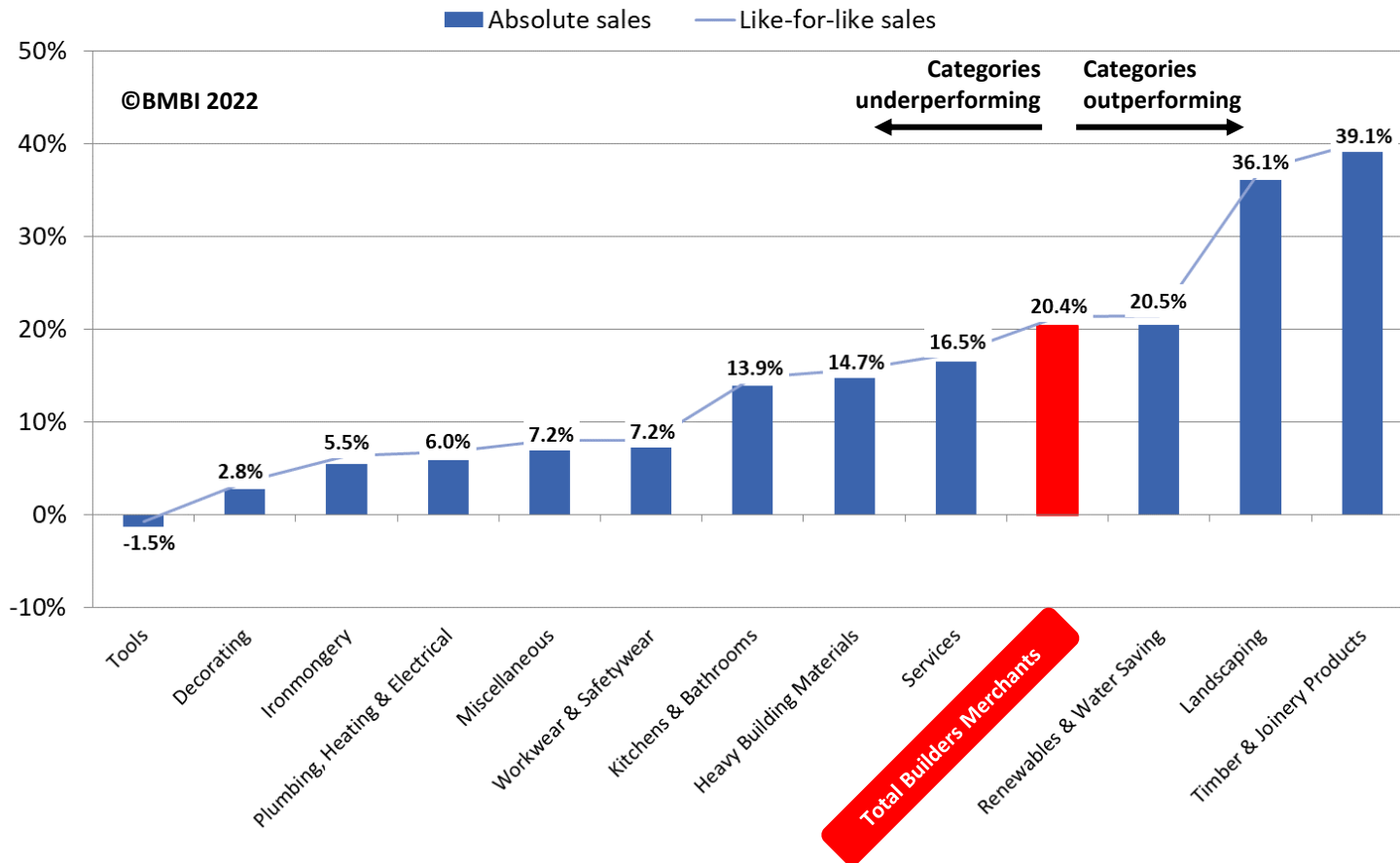
# Last 12 Months: v 2019

## Absolute and like-for-like sales

Two less trading days this year. Like-for-like sales take trading day differences into account.



### 12 months Aug 21 to Jul 22 v 12 months Aug 18 to Jul 19



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

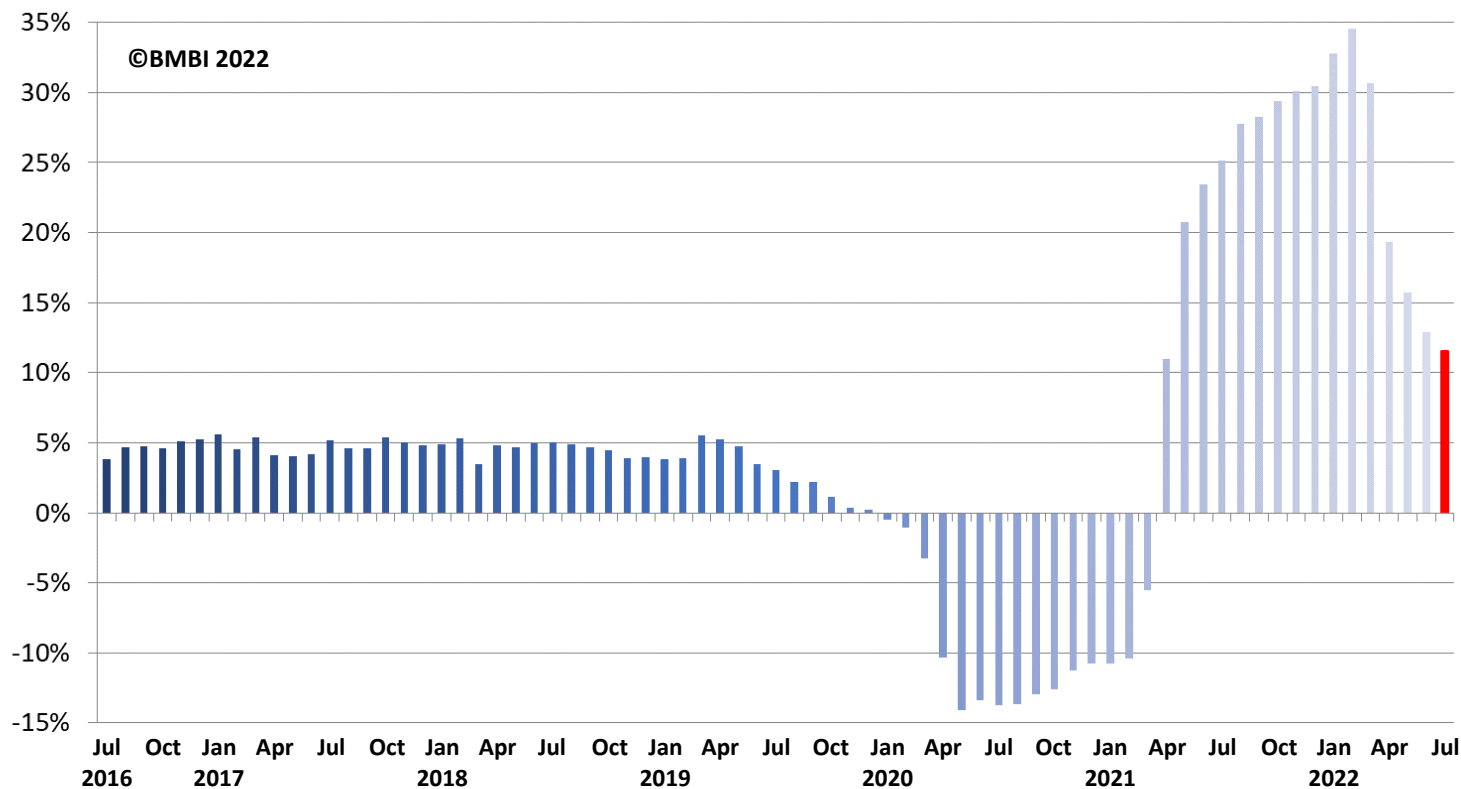
Total sales in the last twelve months were +20.4% higher than the same period three years ago. Eleven of the twelve categories sold more. Timber & Joinery Products (+39.1%) was strongest.

# 12 months: Year on Year

MAT absolute sales



## MAT: Total Builders Merchants July 2016 to July 2022



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

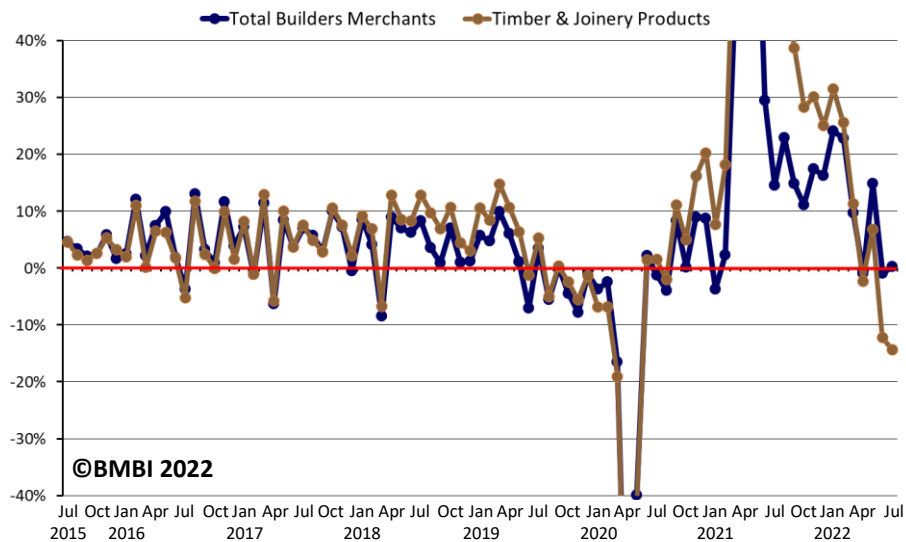
Sales in the past 12 months to July 2022 (+11.5%) were higher compared to August 2020 to July 2021 despite its continued lower growth.



# Monthly Year-on-year

July 2022

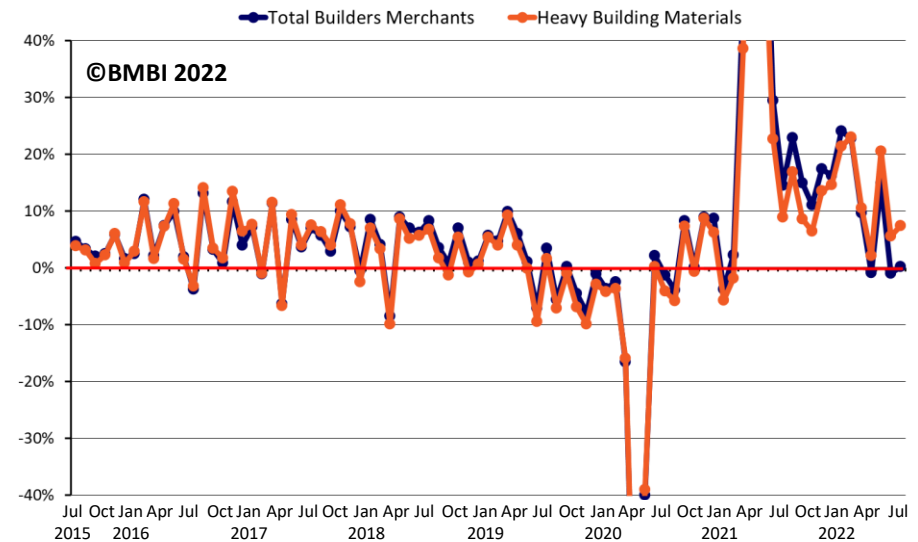
## Timber & Joinery Products - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Timber & Joinery Products	-79.0%
	Total Builders Merchants	-76.5%
April 2021 peak:	Timber & Joinery Products	+555.8%
	Total Builders Merchants	+419.2%

## Heavy Building Materials - Monthly



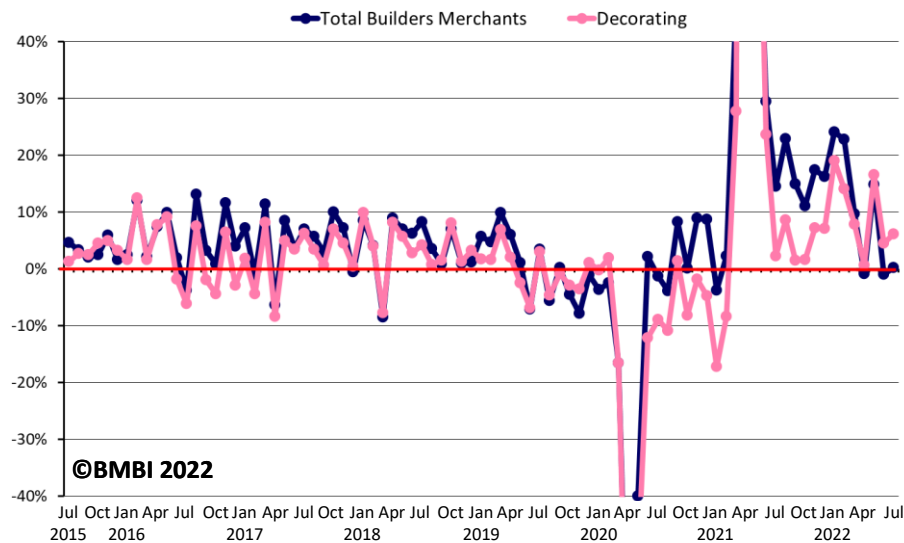
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Heavy Building Materials	-74.7%
	Total Builders Merchants	-76.5%
April 2021 peak:	Heavy Building Materials	+350.6%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

July 2022

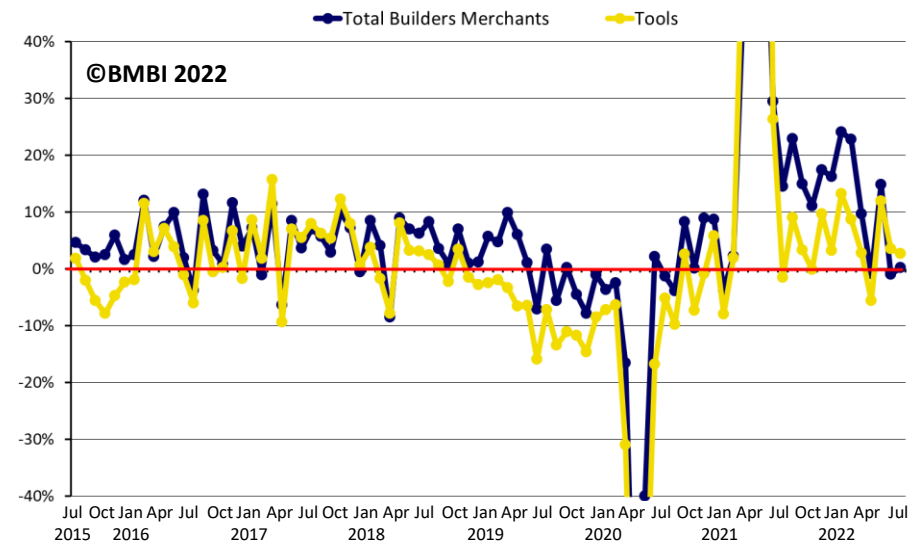
## Decorating - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Decorating	-81.6%
	Total Builders Merchants	-76.5%
April 2021 peak:	Decorating	+472.1%
	Total Builders Merchants	+419.2%

## Tools - Monthly



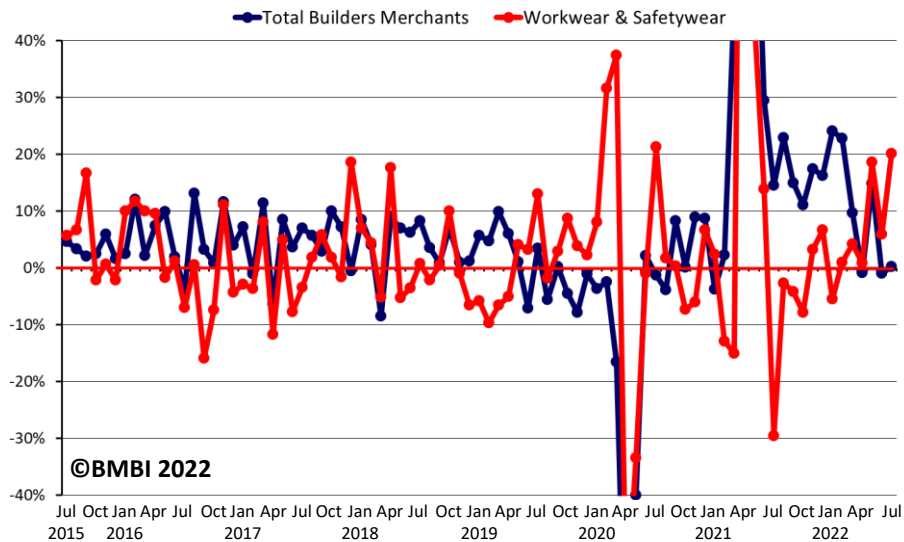
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Tools	-90.0%
	Total Builders Merchants	-76.5%
April 2021 peak:	Tools	+1188.1%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

July 2022

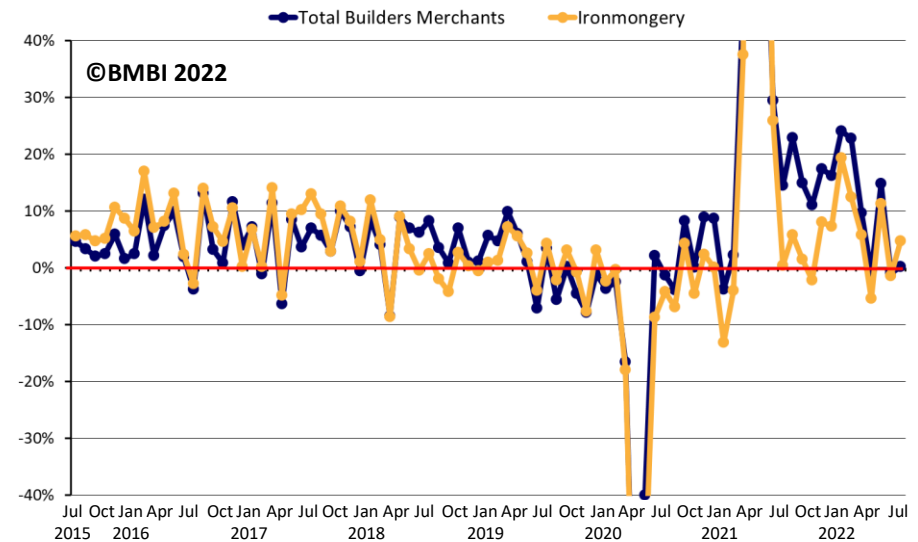
## Workwear & Safetywear - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Workwear & Safetywear	-60.2%
	Total Builders Merchants	-76.5%
April 2021 peak:	Workwear & Safetywear	+175.8%
	Total Builders Merchants	+419.2%

## Ironmongery - Monthly



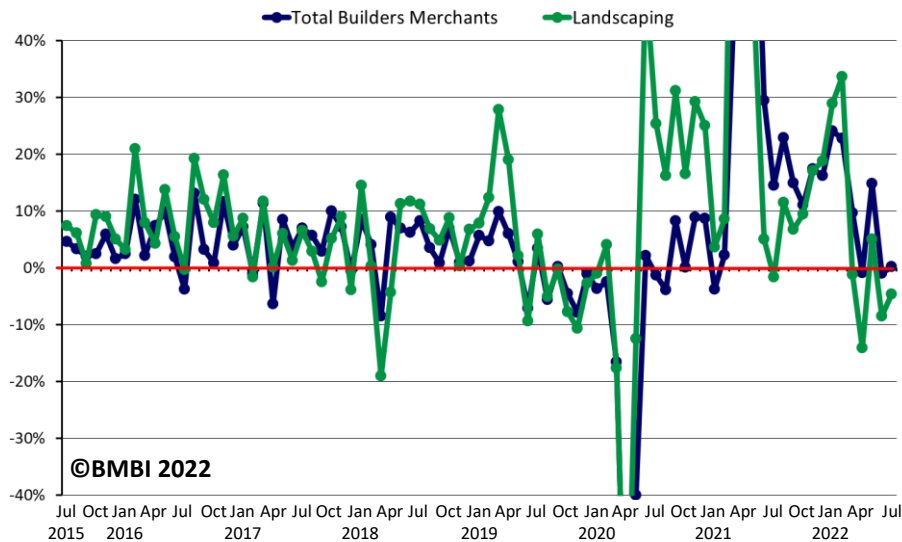
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Ironmongery	-77.8%
	Total Builders Merchants	-76.5%
April 2021 peak:	Ironmongery	+403.2%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

July 2022

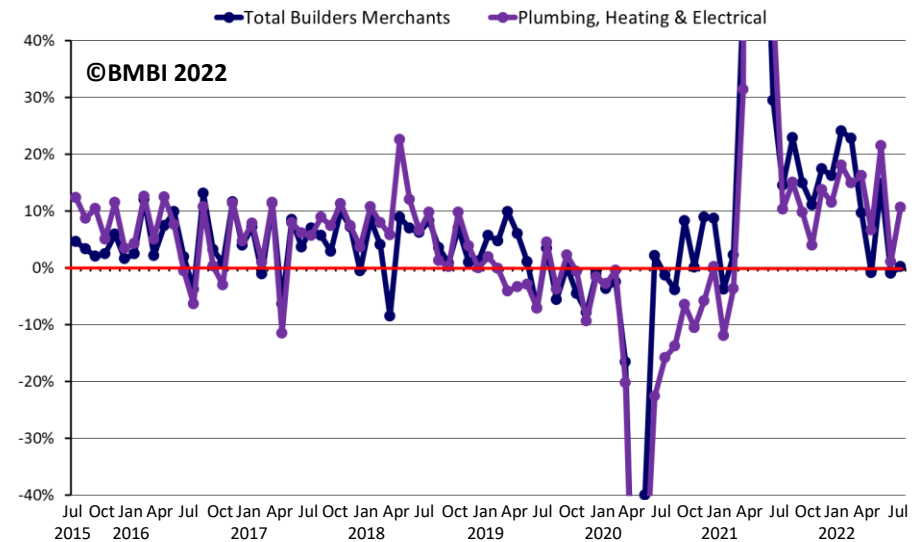
## Landscaping - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Landscaping	-74.4%
	Total Builders Merchants	-76.5%
April 2021 peak:	Landscaping	+538.4%
	Total Builders Merchants	+419.2%

## Plumbing Heating & Electrical - Monthly



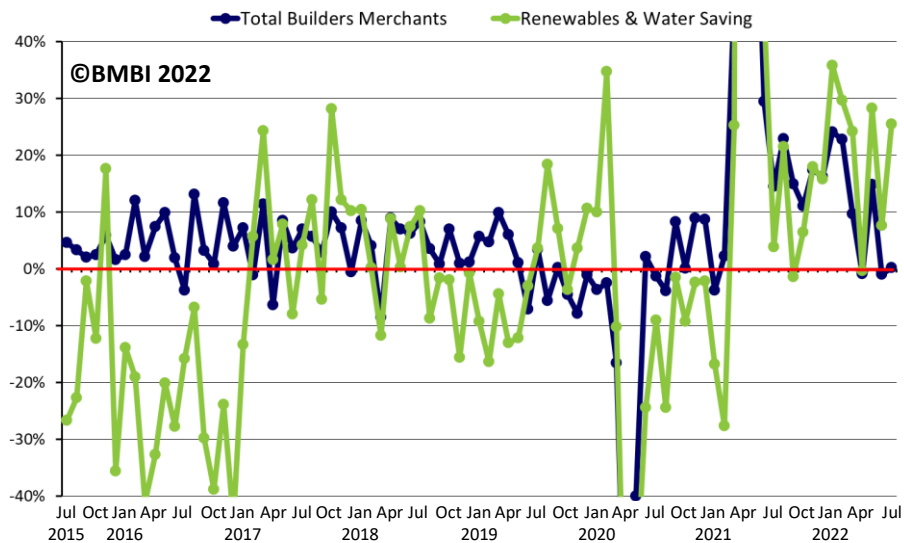
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Plumbing Heating & Electrical	-77.9%
	Total Builders Merchants	-76.5%
April 2021 peak:	Plumbing Heating & Electrical	+369.9%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

July 2022

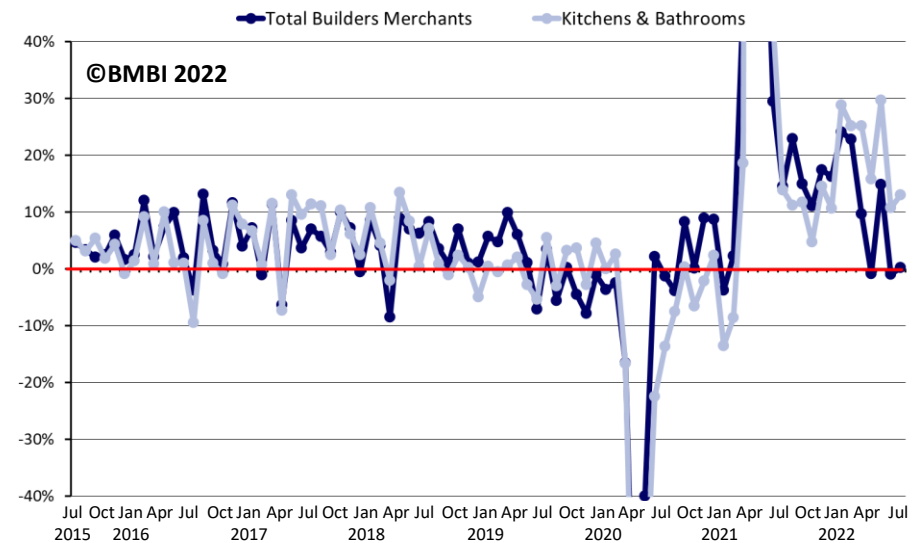
## Renewables & Water Saving - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Renewables & Water Saving	-77.4%
	Total Builders Merchants	-76.5%
April 2021 peak:	Renewables & Water Saving	+518.1%
	Total Builders Merchants	+419.2%

## Kitchens & Bathrooms - Monthly



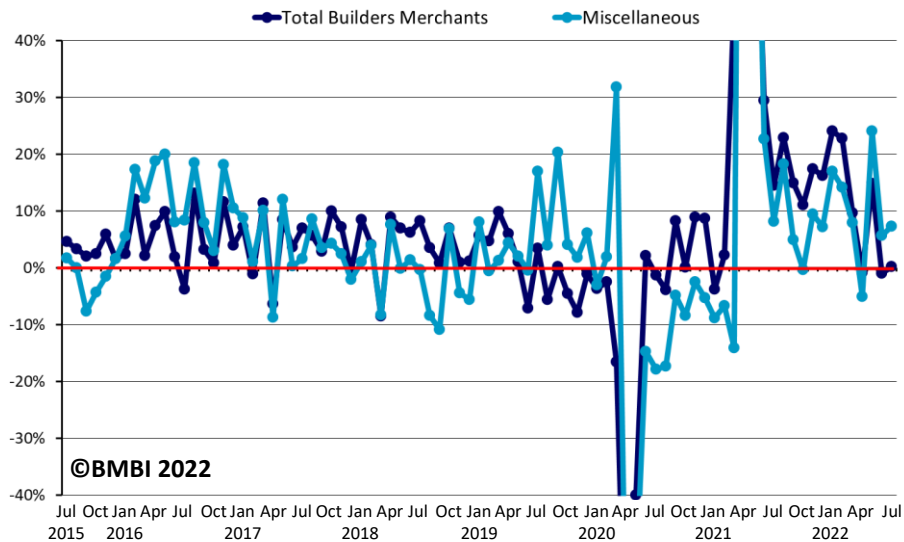
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Kitchens & Bathrooms	-86.8%
	Total Builders Merchants	-76.5%
April 2021 peak:	Kitchens & Bathrooms	+706.3%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

July 2022

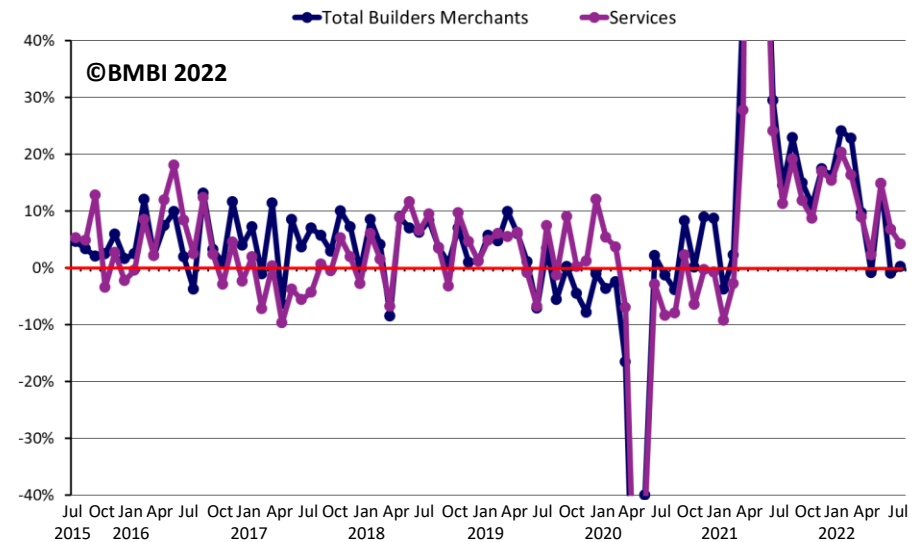
## Miscellaneous - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Miscellaneous	-67.7%
	Total Builders Merchants	-76.5%
April 2021 peak:	Miscellaneous	+243.5%
	Total Builders Merchants	+419.2%

## Services - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Services	-62.9%
	Total Builders Merchants	-76.5%
April 2021 peak:	Services	+204.2%
	Total Builders Merchants	+419.2%



# Monthly: Index and Categories

July 2021\* – July 2022

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



		2021						2022						
MONTHLY SALES VALUE INDEX	Index	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Total Builders Merchants	100	151.1	139.3	147.9	140.4	145.0	97.1	125.0	134.4	166.8	149.3	162.4	155.6	151.5
Timber & Joinery Products	100	199.8	182.6	193.3	181.0	182.1	119.0	157.8	161.8	195.6	172.3	185.0	175.2	171.0
Heavy Building Materials	100	136.8	127.0	136.2	130.8	135.6	89.6	116.5	125.4	156.2	140.4	155.1	150.8	147.0
Decorating	100	115.0	108.7	114.8	113.5	118.5	81.7	102.2	109.3	131.2	114.0	124.2	122.0	122.1
Tools	100	97.6	93.6	101.8	100.9	109.8	73.2	95.7	101.9	124.2	104.6	109.9	103.7	100.3
Workwear & Safetywear	100	92.8	95.7	106.5	115.4	130.8	93.8	115.7	112.4	123.3	104.9	113.7	118.5	111.5
Ironmongery	100	129.2	120.2	129.2	124.6	132.8	94.2	123.2	125.5	151.5	130.1	141.3	135.2	135.3
Landscaping	100	204.8	175.3	171.9	148.5	143.7	92.6	116.2	149.5	220.0	220.8	231.7	215.1	195.5
Plumbing, Heating & Electrical	100	113.7	109.7	126.7	131.0	143.3	107.2	131.4	138.3	159.4	127.1	137.3	125.1	125.9
Renewables & Water Saving	100	72.1	70.6	70.9	71.5	82.9	58.3	85.1	80.9	106.8	78.6	93.3	86.3	90.4
Kitchens & Bathrooms	100	126.5	118.3	131.2	124.9	140.6	96.8	121.6	134.5	151.1	131.5	144.6	138.7	143.1
Miscellaneous	100	121.6	116.2	128.4	120.4	130.2	92.3	128.0	122.4	141.7	119.9	137.9	127.1	130.6
Services	100	132.8	130.2	133.4	127.7	135.1	102.7	112.5	120.1	146.6	131.7	141.8	140.5	138.4

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

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

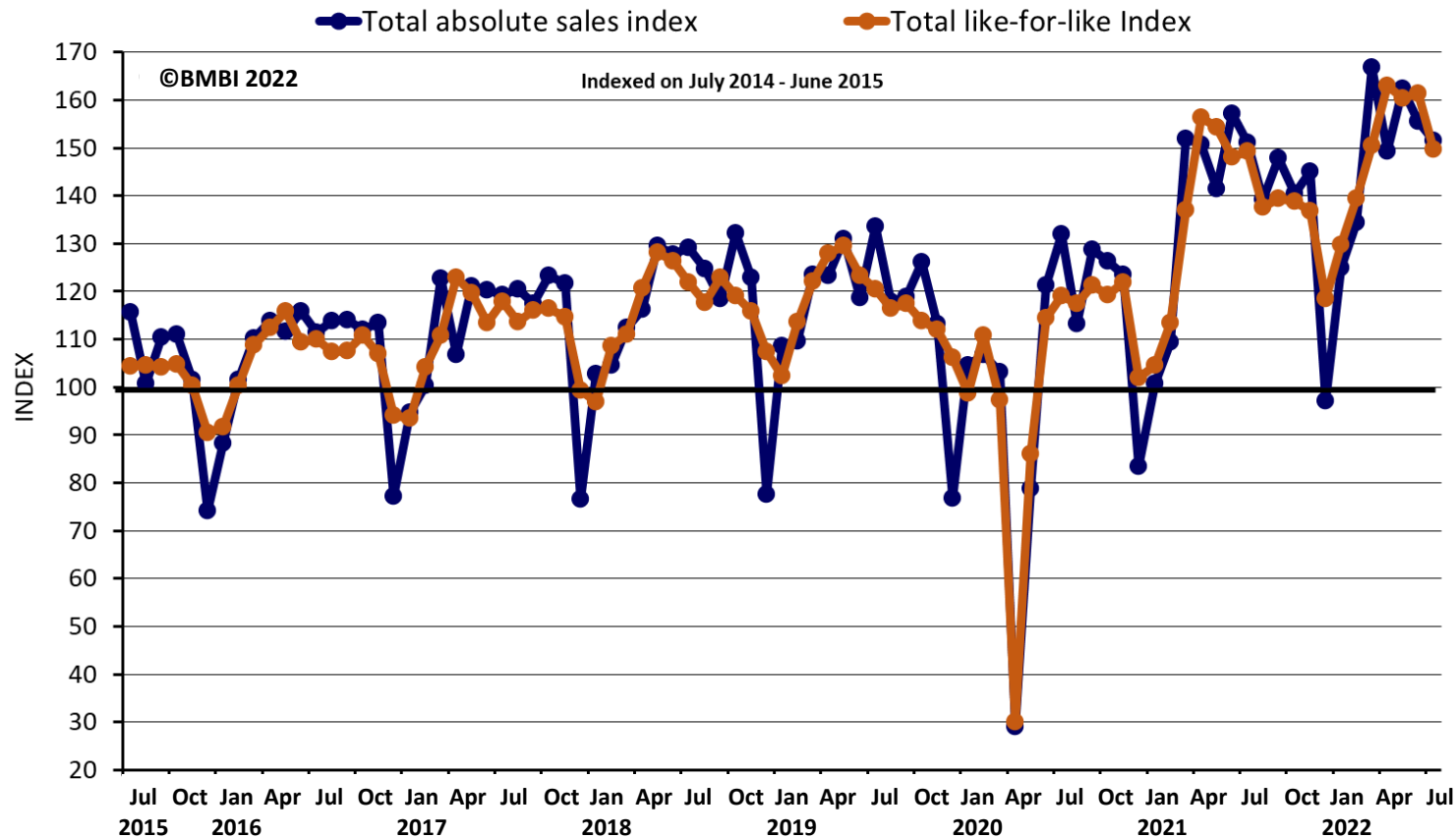
# Monthly: Index

## Absolute and like-for-like sales

No difference in trading days this month. Like-for-like sales take trading day differences into account.



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



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

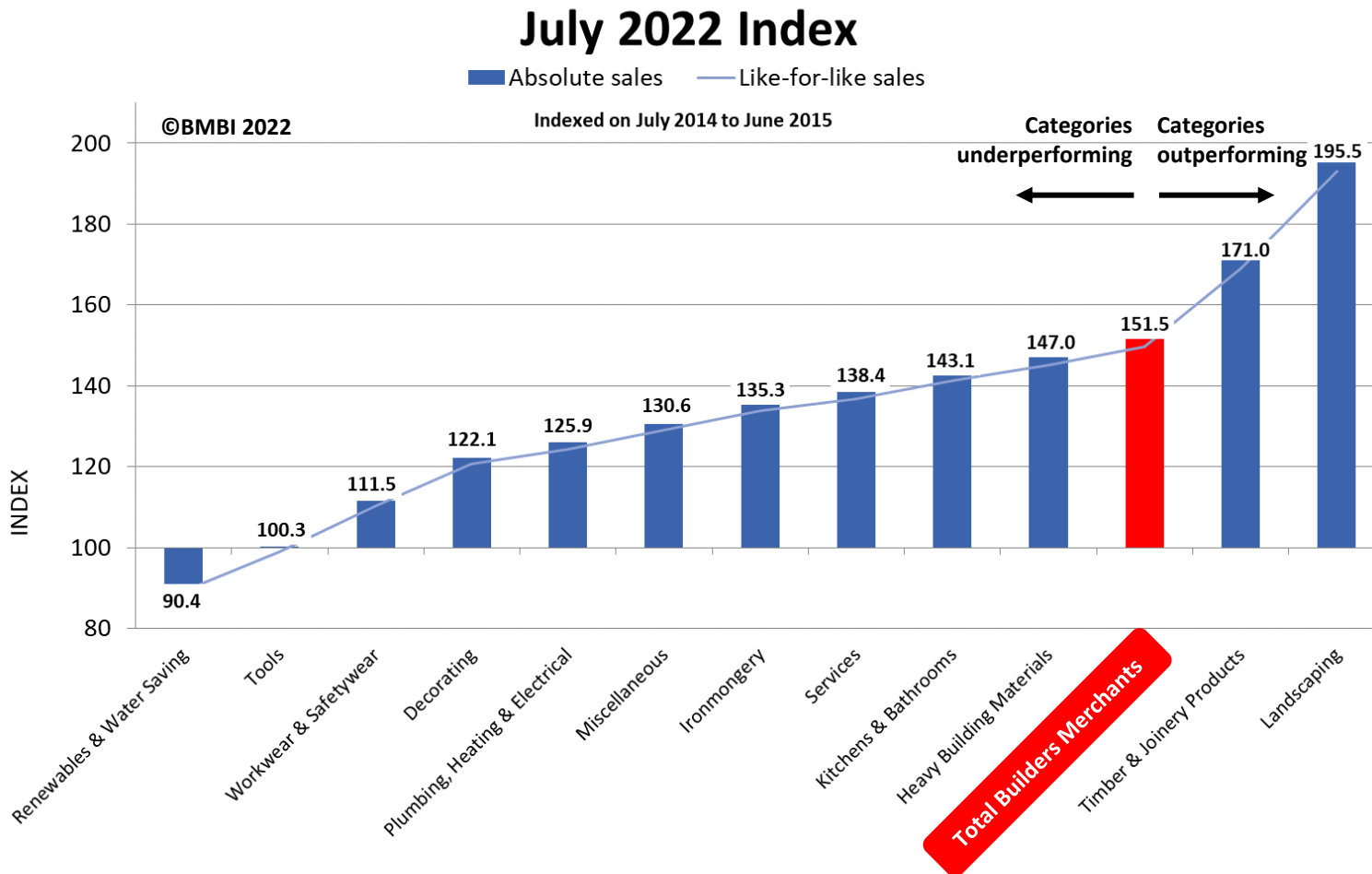
Values shown for  
absolute sales

July's absolute sales index (151.5) was lower than June and the like-for-like index (149.7) started declining since its peak in April this year.

# Monthly: Index and Categories

## July 2022 index

No difference in trading days. Like-for-like sales take trading day differences into account.



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

Values shown for  
absolute sales

Eleven of the twelve  
categories indexed  
above 100 in July  
with seasonal  
category  
Landscaping (195.5)  
doing best.

# Trading Days



## Monthly

Index: 20.8

2020											
Jan	Feb	Mar*	Apr*	May*	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	20	19	22	21	21	22	21	22	17
2022											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	19	21	20	21					

## Quarterly

Index: 62.3

2020			
Q1	Q2	Q3	Q4
64	61	65	60
2021			
Q1	Q2	Q3	Q4
63	61	64	60
2022			
Q1	Q2	Q3	Q4
63	60		

## Half Year

2020	
H1	H2
125	125
2021	
H1	H2
124	124
2022	
H1	H2
123	

## Full Year

2020
250
2021
248
2022

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

**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to July 2022

# 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%.

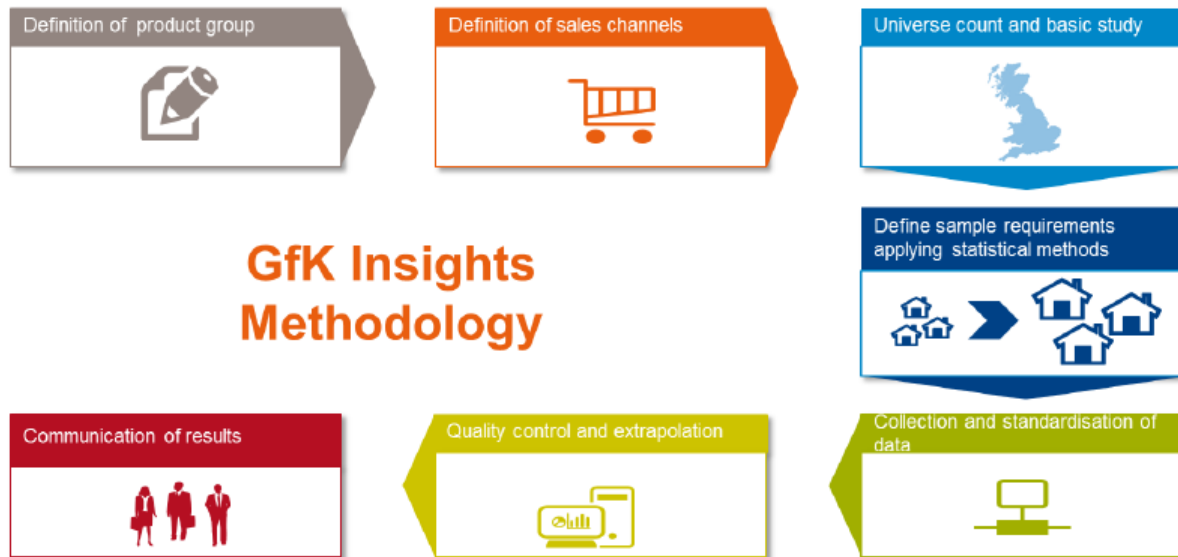
Examples include:



INDEPENDENT BUILDERS MERCHANT GROUP



# 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

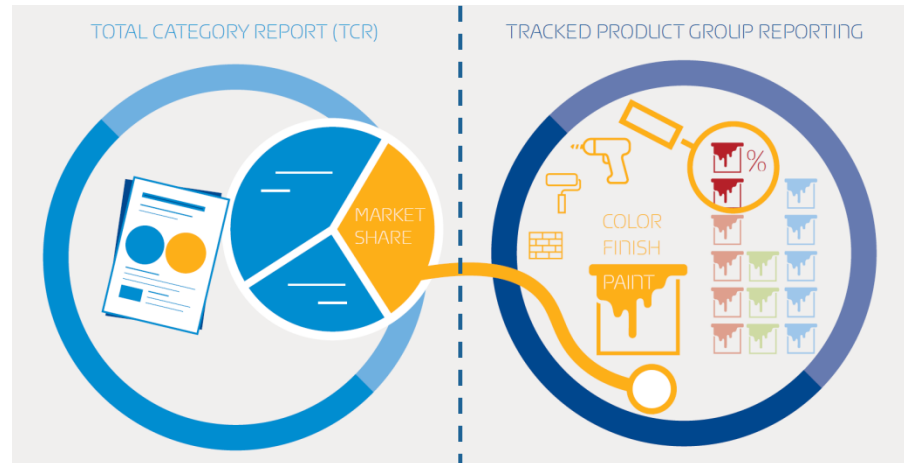
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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”



“building **excellence**  
in materials supply”

## BMF (Builders Merchant Federation) Forecast Report

# BMF Forecast Report

## Summer 2022 edition



### Builders Merchants Industry Forecast Report

The eleventh edition of the BMF's Builders Merchants Industry Forecast, covering Summer 2022 onwards, is available now.

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

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

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

The report is updated on a quarterly basis, with the Summer 2022 edition now available. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Thomas Lowe on 024 7685 4994 or email: [thomas.lowe@bmf.org.uk](mailto:thomas.lowe@bmf.org.uk)



# Building the Industry & Building Brands from Knowledge



# Contact us

For further information



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