

“building **excellence**
in materials supply”

Including
**Plumbing & Heating
Merchant Index**
See page 43

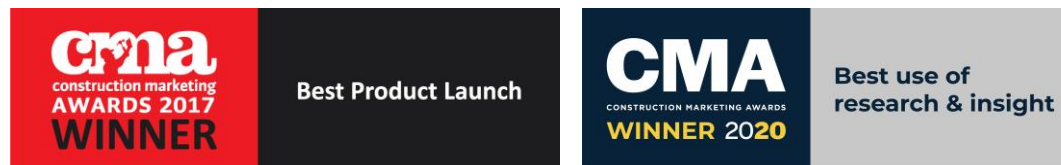
Builders Merchant Building Index



Monthly report for February 2021

(Published 21 April 2021)

Building the Industry & Building Brands from Knowledge



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Introduction



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

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

MRA Research produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: eCommonSense, British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Hanson Cement, Keystone Lintels, Knauf Insulation, Talasey Group, Dulux Trade and Lakes. 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.

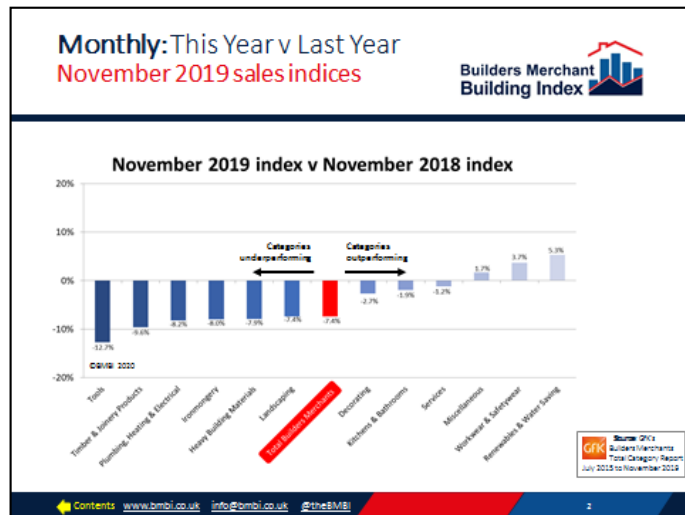
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

Trading day differences explained

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

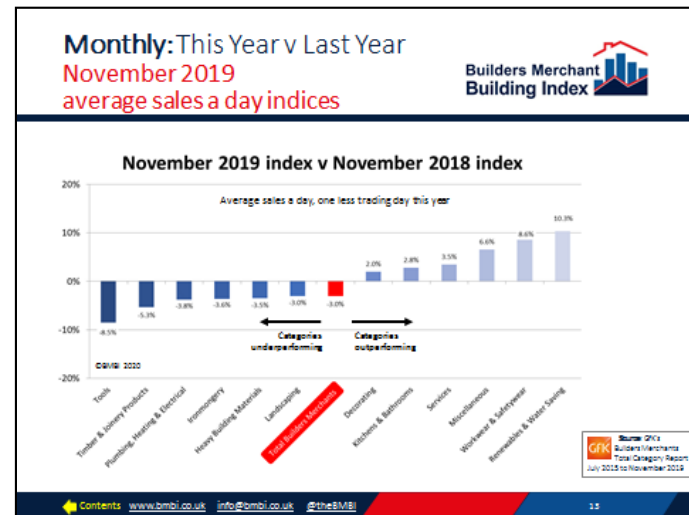
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

Direct comparison of sales indices:



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

Average sales a day indices comparison:



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

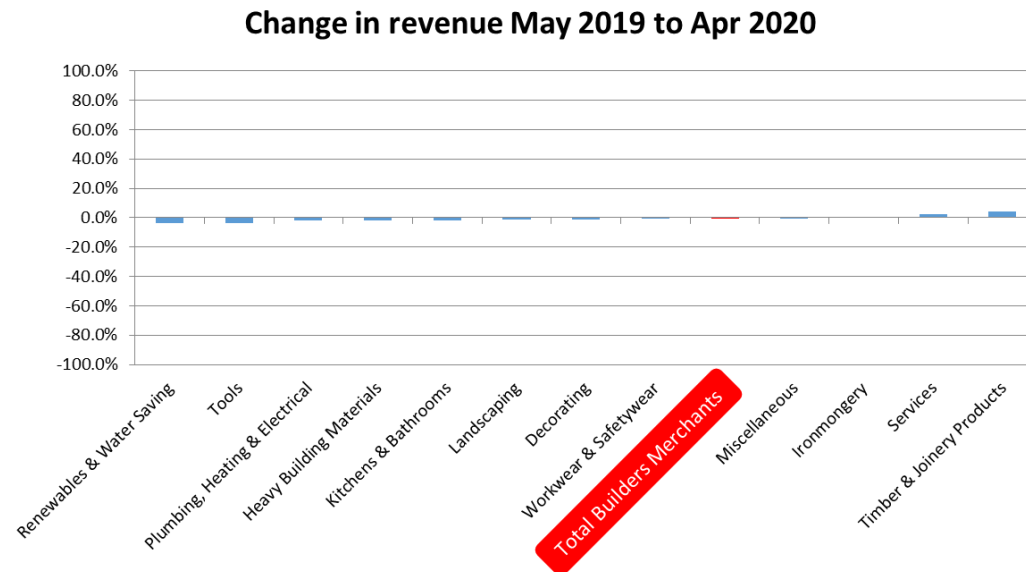
The charts provide two valid views of the same data. Direct comparison (on the left) show what happened in absolute numbers – average sales a day (on the right) enables trading day differences to be set aside.

GfK's Builders Merchant Panel update



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

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



The tables and charts in this report use the refreshed data from January 2019 onwards. For example, the values between February 2020 and April 2020 in the Indices table on page 11 are marginally different to those in reports published prior to May 2020. The chart on page 12 incorporates the new values from January 2019 onwards but the differences are relatively small.

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

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

Higher February sales, driven by a strong performance from Timber & Joinery Products

Year-on-Year

Total Builders Merchants February 2021 value sales were 2.3% higher than in February 2020, with no difference in trading days. However only three of the twelve categories sold more this year, led by a strong performance from Timber & Joinery Products (+18.2%). Others selling more were Landscaping (+8.6%) and Tools (+2.0%).

The nine categories selling less included largest category Heavy Building Materials (-1.8%) and 'Inside' trades Kitchens & Bathrooms (-8.6%), Decorating (-8.4%) and Plumbing Heating & Electrical (-3.6%). Workwear & Safetywear was 12.9% lower but this was on the back of a very strong pre-Covid-19 lockdown performance in February 2020, when it gained 30.8% on February 2019. Looking at a two-year comparison, Workwear & Safetywear was 14.7% higher in February 2021 than in February 2019.

Month-on-Month

Total Merchants February sales were 8.6% higher than in January, with no difference in trading days. Nine of the categories were up. Landscaping (+24.1%) did best, followed by Kitchens & Bathrooms (+13.8%), Decorating (+11.6%) and Tools (+11.0%). Workwear & Safetywear (-9.0%) was weakest.

Other periods

Total sales in the last three months (December 2020 to February 2021) were 1.8% higher than in December 2019 to February 2020, with no difference in trading days. Only Timber & Joinery Products (+14.8%) and Landscaping (+11.0%) sold more. Categories doing less well included Decorating (-10.5%) and Kitchens & Bathrooms (-7.3%).

Sales in the 12 months March 2020 to February 2021 were 10.4% lower than in the preceding 12 months. Only Landscaping (+6.0%) sold more. A number of categories remain well-adrift due to the initial Covid-19 lockdown, including Plumbing Heating & Electrical (-20.2%), Kitchens & Bathrooms (-20.1%), Tools (-19.8%) and Decorating (-18.6%). As we approach the first anniversary of Lockdown 1, with its severe impact on sales in April and May 2020, the scope of returning to MAT year-on-year growth can be anticipated.

Index

February's BMBI index was 109.4. Nine of the categories exceeded 100, led by Timber & Joinery Products (128.8). Next-strongest was Plumbing Heating & Electrical (120.3). Of the main categories, Tools (93.7) was weakest, followed by Decorating (95.7).

Total Builders Merchants February 2021 value sales were 2.3% higher than in February 2020. However only three of the twelve categories sold more this year, led by a strong performance from Timber & Joinery Products (+18.2%).

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 Q4 2020 report, which includes commentary from our experts is available [here](#)

Meet the Builders Merchant Building Index Experts:

Expert for Drylining Systems:



Stacey Temprell,
Marketing Director
British Gypsum

[Read latest comment: Q4 2020 Report](#)

Expert for Bricks & Roof Tiles:



Kevin Tolson,
Commercial Director
Wienerberger UK

[Read latest Comment: Q4 2020 Report](#)

Expert for Website & Product Data Management Solutions:



Andy Scothern
Managing Director
eCommonSense

[Read latest Comment: Q4 2020 Report](#)

Expert for Civils & Green Infrastructure:



Steve Durdant-Hollamby,
Managing Director
Polypipe Civils

[Read latest Comment: Q4 2020 Report](#)

Expert for Lead:



Lynn Street
Sales & Marketing Manager
Midland Lead

[Read latest Comment: Q4 2020 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q4 2020 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q4 2020 Report](#)

Expert for PVC-U Windows & Doors:



Kevin Morgan
Group Commercial Director
The Crystal Group

[Read latest Comment: Q4 2020 Report](#)

Expert for Natural Stone Landscaping Products, Vitrified Paving & Artificial Grass:



Malcolm Gough
Group Sales & Marketing Director
Talasey Group

[Read latest Comment: Q4 2020 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q4 2020 Report](#)

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Hanson Cement

[Read latest Comment: Q4 2020 Report](#)

Expert for Paint:



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

[Read latest Comment: Q4 2020 Report](#)

Expert for Shower Enclosures and Showering:



Mike Tattam
Sales & Marketing Director
Lakes

[Read latest Comment: Q4 2020 Report](#)

Monthly: Index and Categories

February 2020* – February 2021

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



		2020											2021	
MONTHLY SALES VALUE INDEX	Index	Feb	Mar	Apr	May	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Total Builders Merchants	100	106.9	103.1	29.0	78.7	121.4	131.9	113.3	128.7	126.4	123.5	83.5	100.7	109.4
Timber & Joinery Products	100	109.0	105.0	26.9	80.5	126.7	140.3	120.6	139.3	141.1	139.9	95.2	120.0	128.8
Heavy Building Materials	100	103.8	102.0	30.5	78.5	116.4	125.6	108.6	125.4	122.8	119.4	78.1	95.9	102.0
Decorating	100	104.5	95.2	19.8	54.8	94.4	112.4	100.1	113.1	111.7	110.5	76.2	85.8	95.7
Tools	100	91.9	74.2	8.6	35.1	79.3	99.0	85.8	98.5	101.0	100.0	70.9	84.4	93.7
Workwear & Safetywear	100	127.7	139.1	37.7	66.6	98.2	131.7	98.4	111.1	125.2	126.7	87.9	122.3	111.3
Ironmongery	100	116.1	104.0	27.3	58.9	108.8	128.7	113.6	127.3	127.3	122.9	87.8	103.1	111.5
Landscaping	100	103.0	110.4	40.3	152.5	223.7	208.2	157.2	161.0	135.6	122.8	78.0	90.1	111.9
Plumbing, Heating & Electrical	100	124.8	104.3	25.4	51.8	84.4	103.1	95.3	115.4	126.0	125.9	96.1	111.3	120.3
Renewables & Water Saving	100	86.1	68.6	12.7	26.7	55.1	69.3	58.2	71.9	67.2	70.3	50.4	62.6	62.3
Kitchens & Bathrooms	100	117.5	101.7	14.1	43.7	87.3	111.1	106.3	117.3	119.3	122.7	87.4	94.4	107.4
Miscellaneous	100	114.7	152.6	36.7	55.1	98.0	112.4	98.2	122.3	120.8	118.9	86.1	109.4	107.1
Services	100	106.1	105.3	42.3	70.2	105.9	119.4	109.2	119.2	117.5	115.4	89.0	93.5	103.3

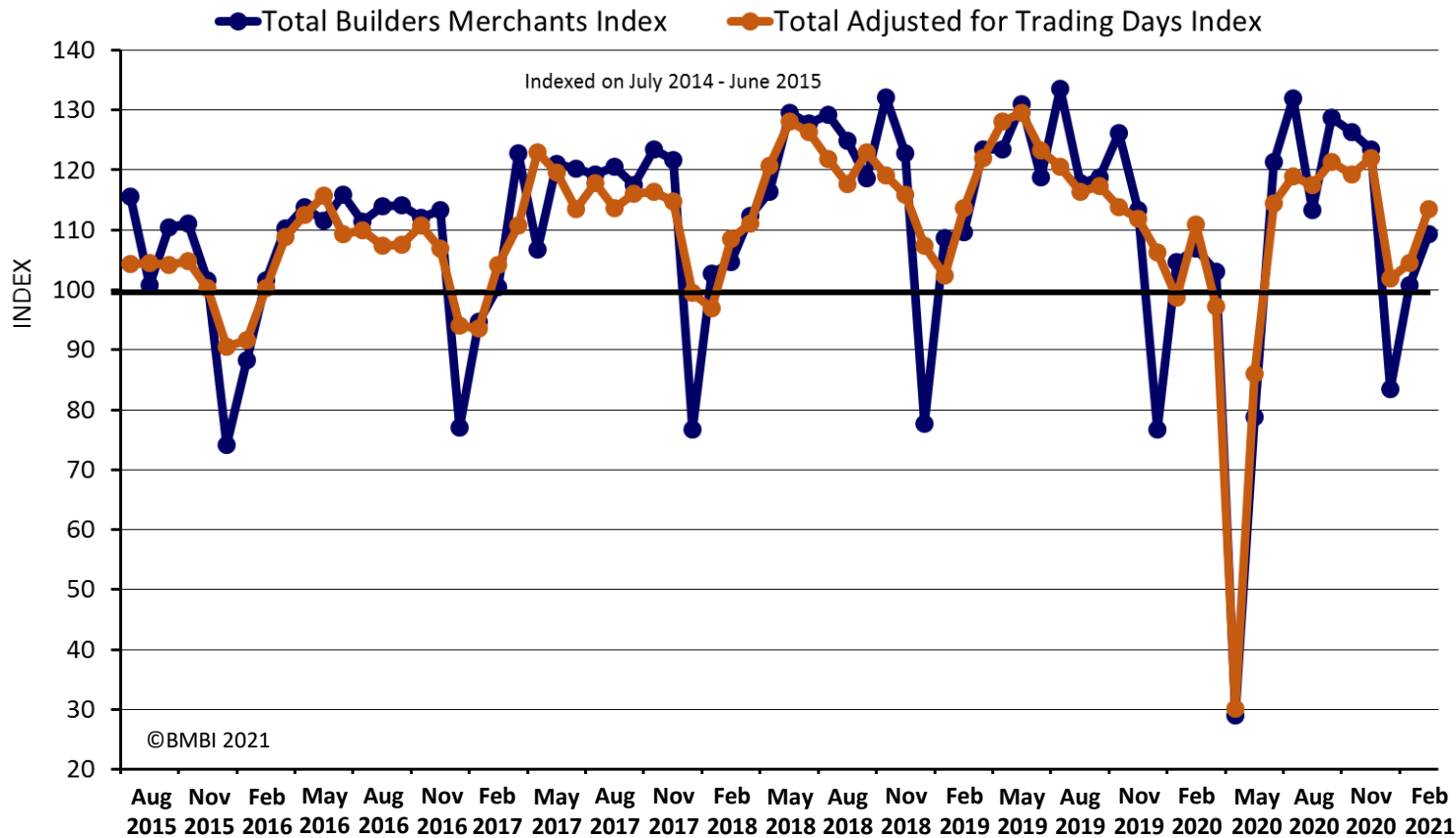
*Click the web link below to see the complete series of indices from July 2015.


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

Monthly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index

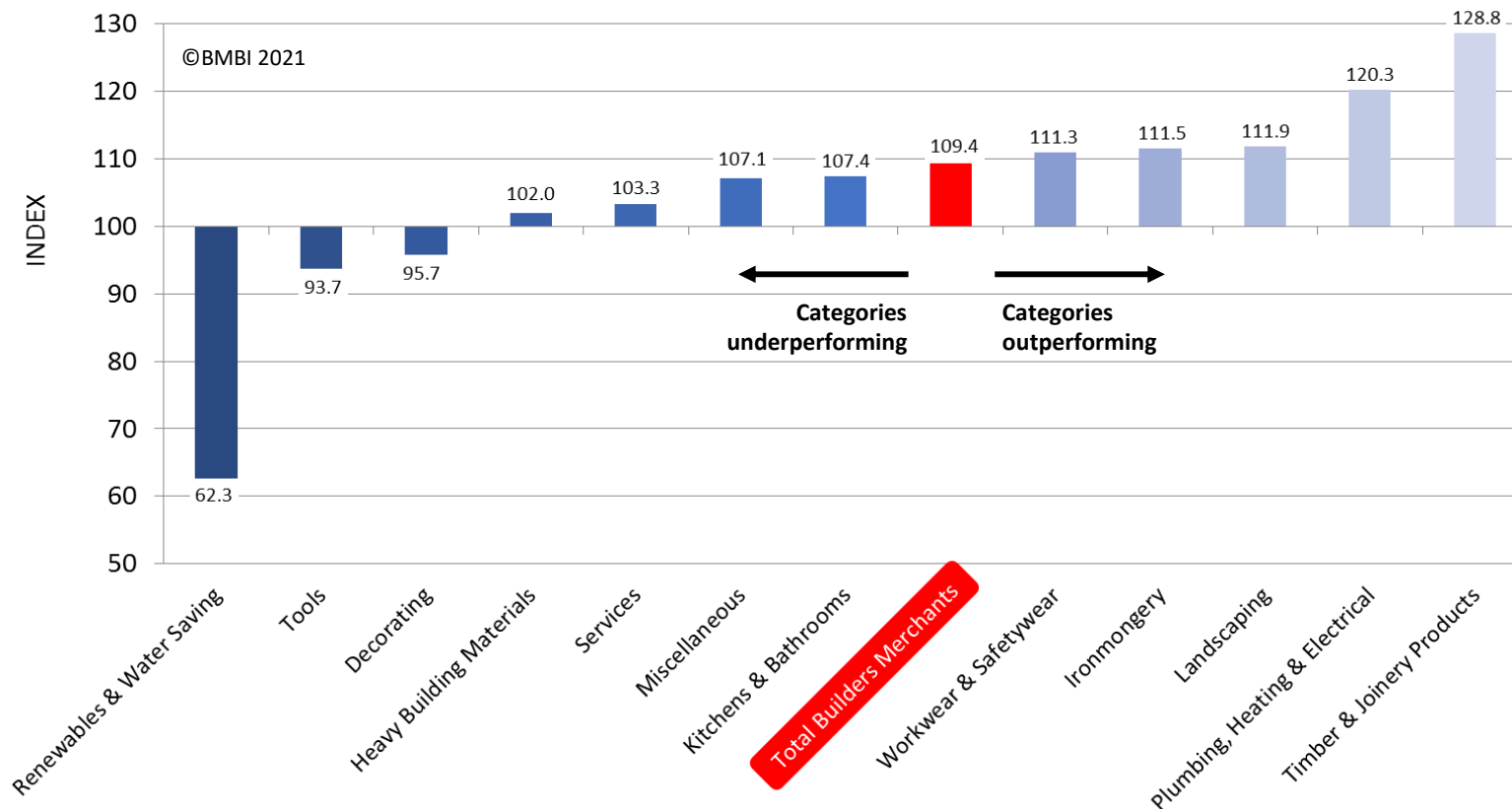



 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Monthly: Index and Categories

February 2021 index

February 2021 Index

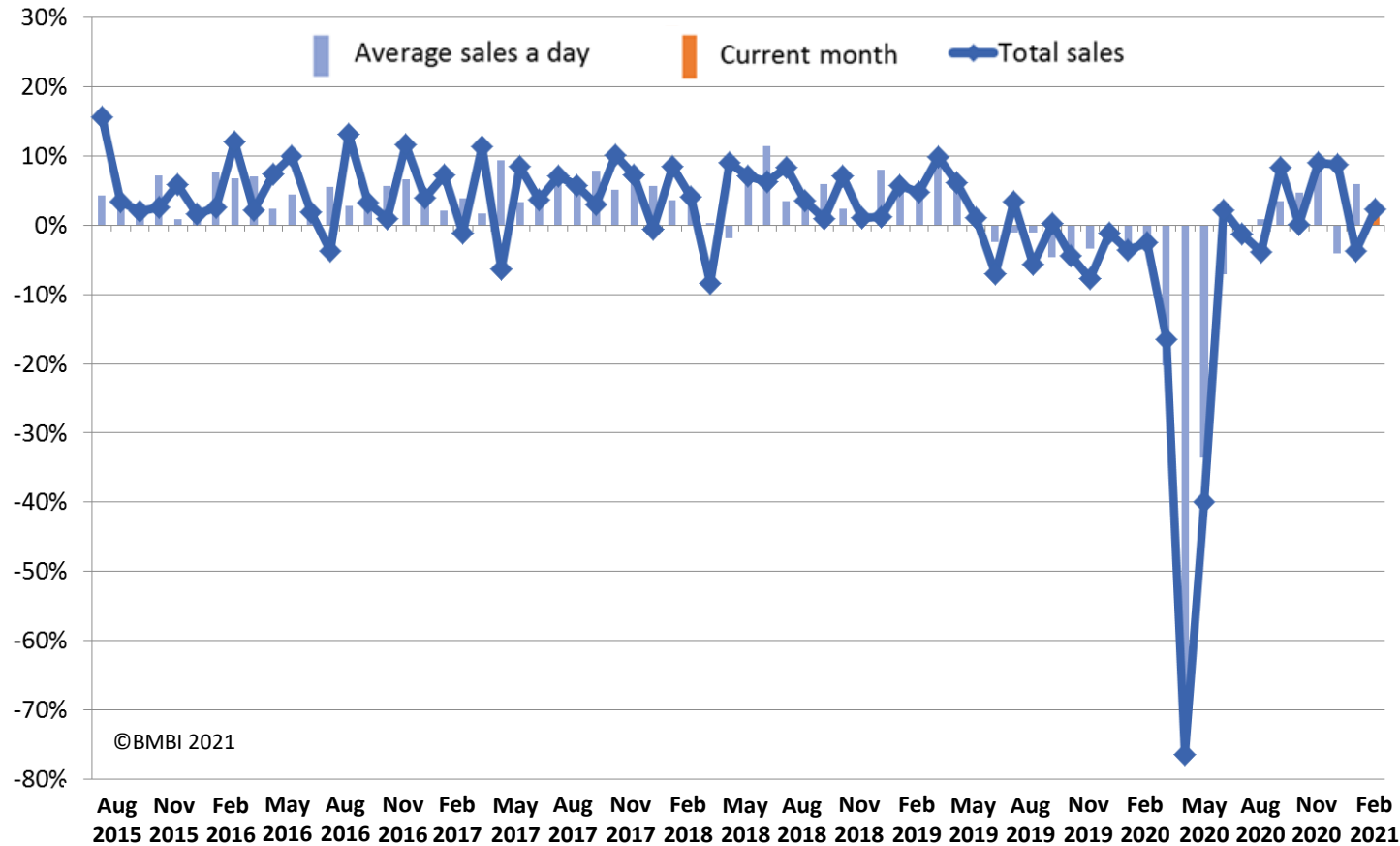


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Monthly: Sales Indices Year on Year

Adjusted and unadjusted for trading days

Monthly: Year on Year

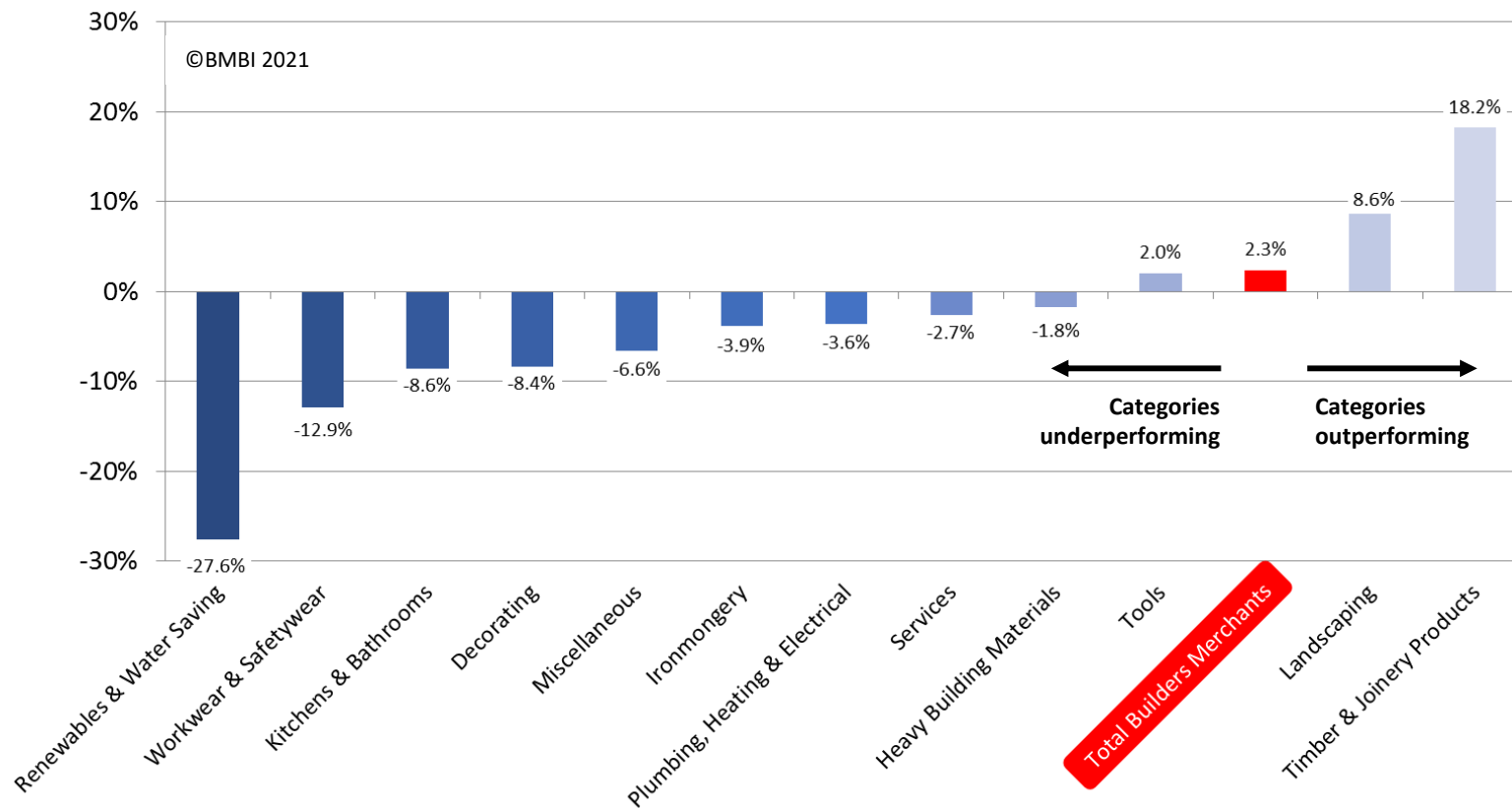



Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Monthly: This Year v Last Year

February 2021 sales indices

February 2021 index v February 2020 index

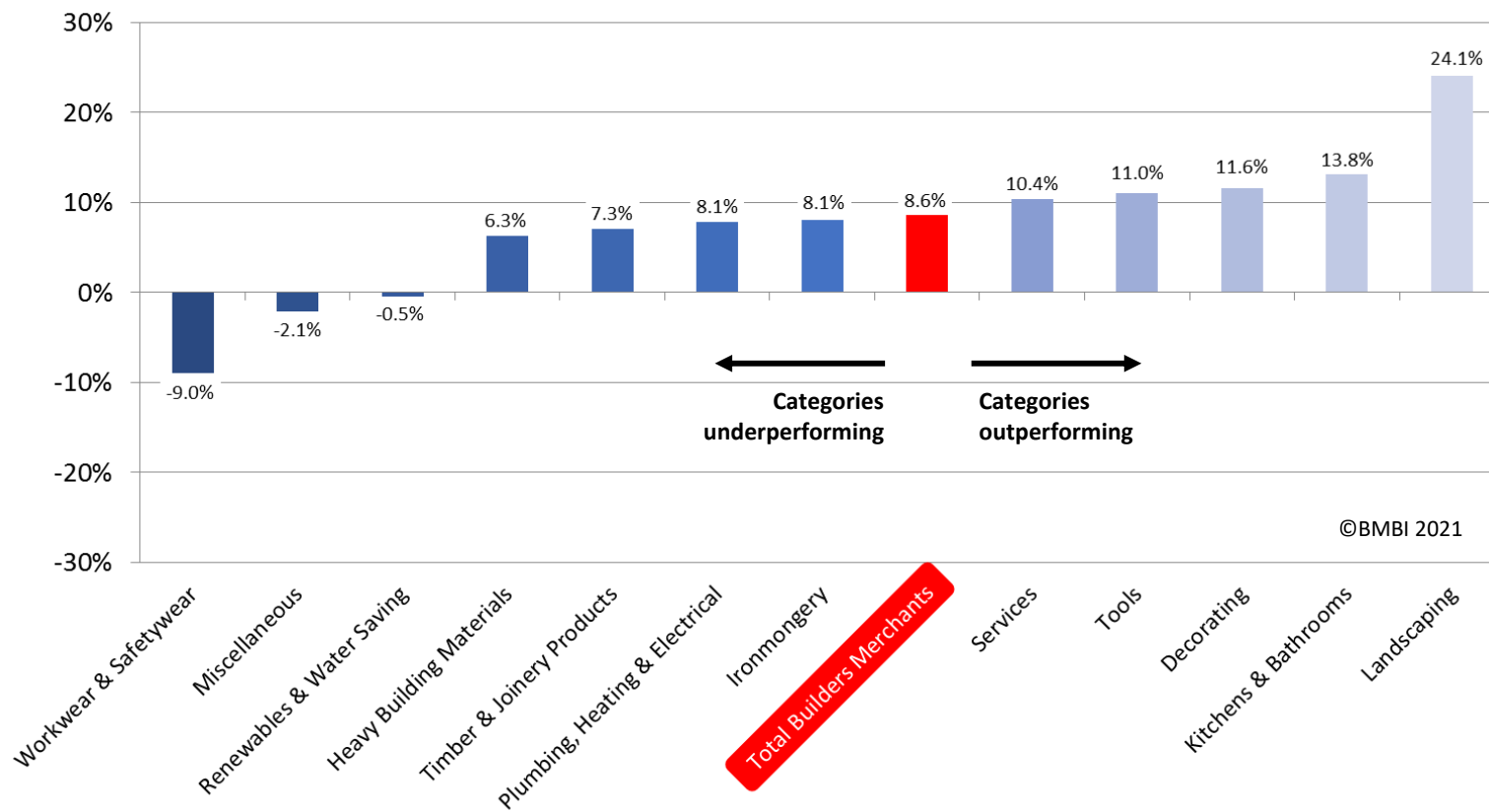


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Monthly: This Month v Last Month

February 2021 sales indices

February 2021 Index v January 2021 Index



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

Quarterly: Index and Categories

Quarter 4 2019* to Quarter 4 2020

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020
Total Builders Merchants	100	105.4	104.9	76.4	124.6	111.1
Timber & Joinery Products	100	111.3	108.5	78.0	133.4	125.4
Heavy Building Materials	100	102.3	102.5	75.1	119.9	106.8
Decorating	100	104.7	101.1	56.3	108.5	99.5
Tools	100	92.2	86.0	41.0	94.4	90.7
Workwear & Safetywear	100	117.4	128.7	67.5	113.7	113.3
Ironmongery	100	113.6	112.9	65.0	123.2	112.6
Landscaping	100	91.2	100.1	138.8	175.5	112.1
Plumbing, Heating & Electrical	100	123.4	118.5	53.9	104.6	116.0
Renewables & Water Saving	100	65.8	76.6	31.5	66.4	62.6
Kitchens & Bathrooms	100	112.8	109.4	48.4	111.6	109.8
Miscellaneous	100	114.9	129.1	63.3	111.0	108.6
Services	100	110.3	104.8	72.8	115.9	107.3

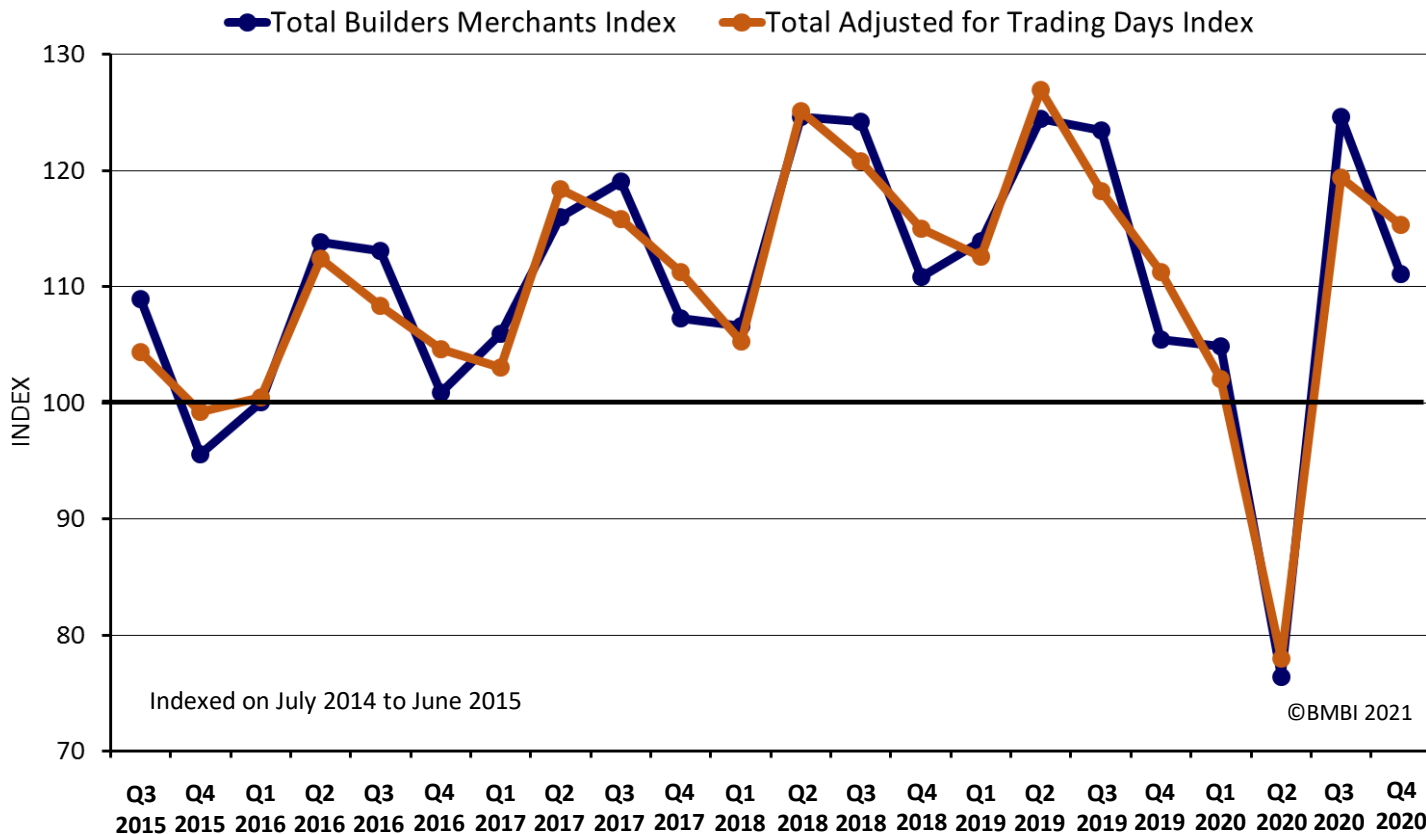
*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index



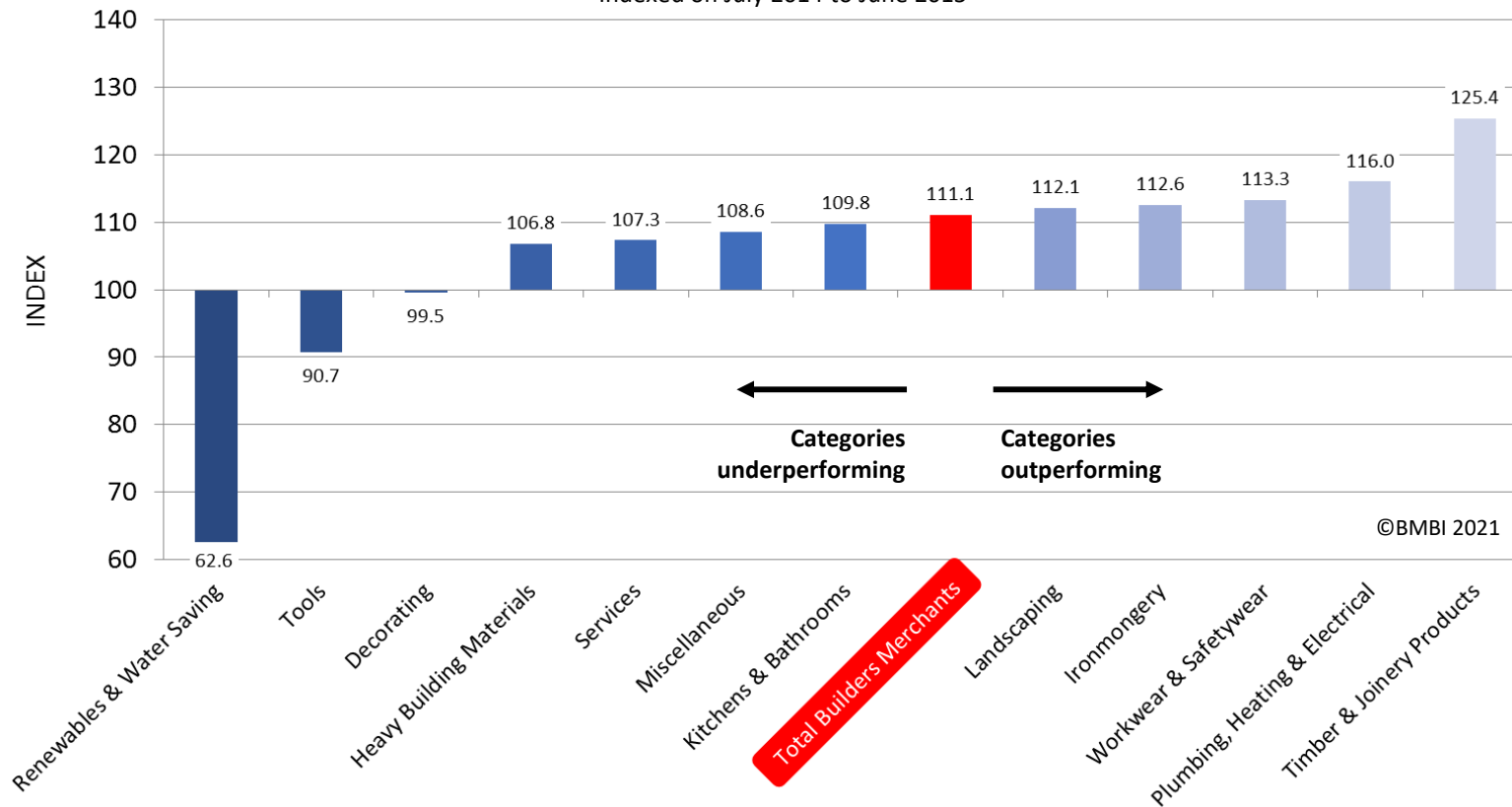
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Index and Categories

Q4 2020 index

Quarter 4 2020

Indexed on July 2014 to June 2015



 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

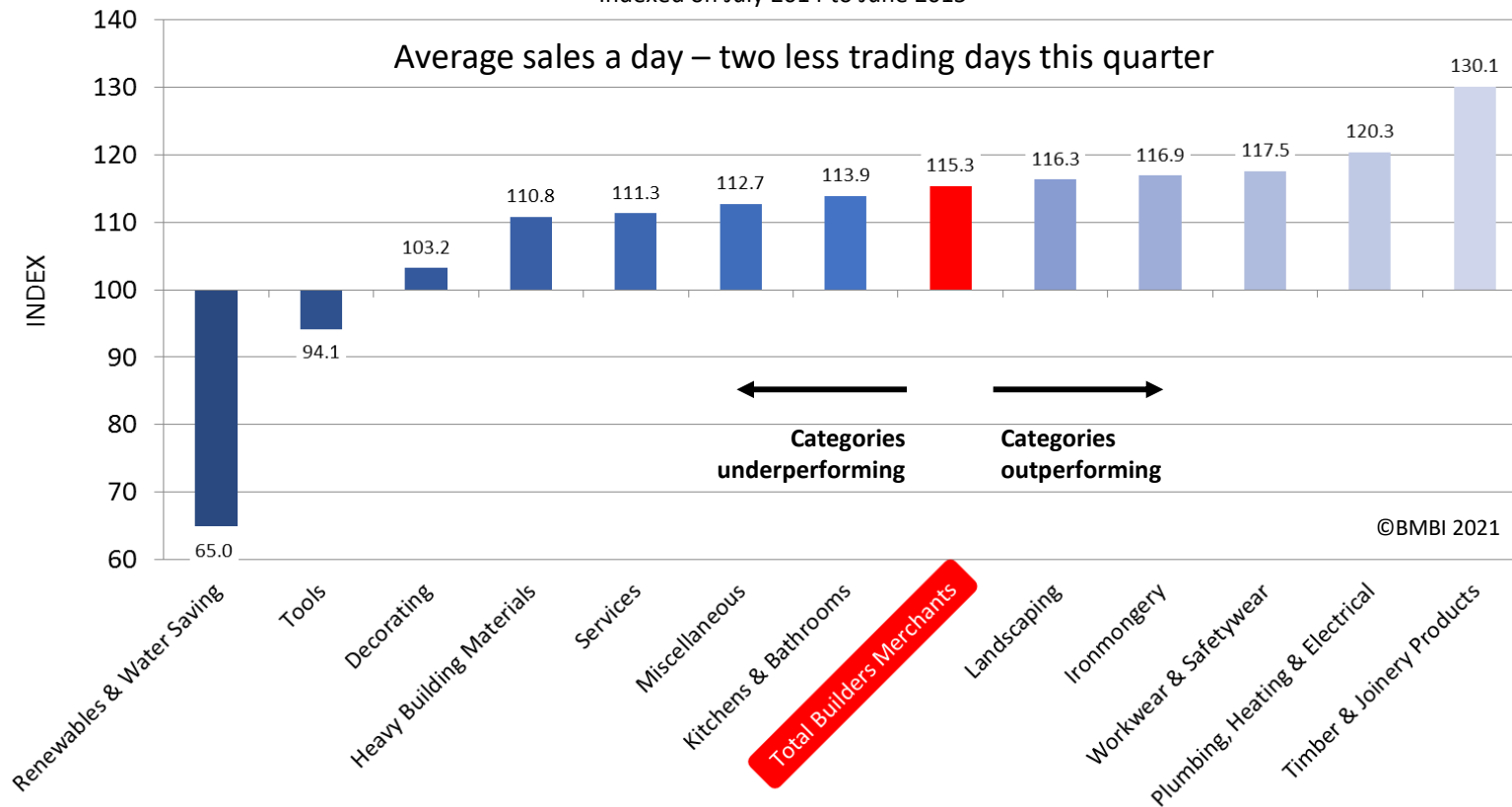
Quarterly: Index and Categories

Q4 2020 average sales a day index

Quarter 4 2020

Indexed on July 2014 to June 2015

Average sales a day – two less trading days this quarter

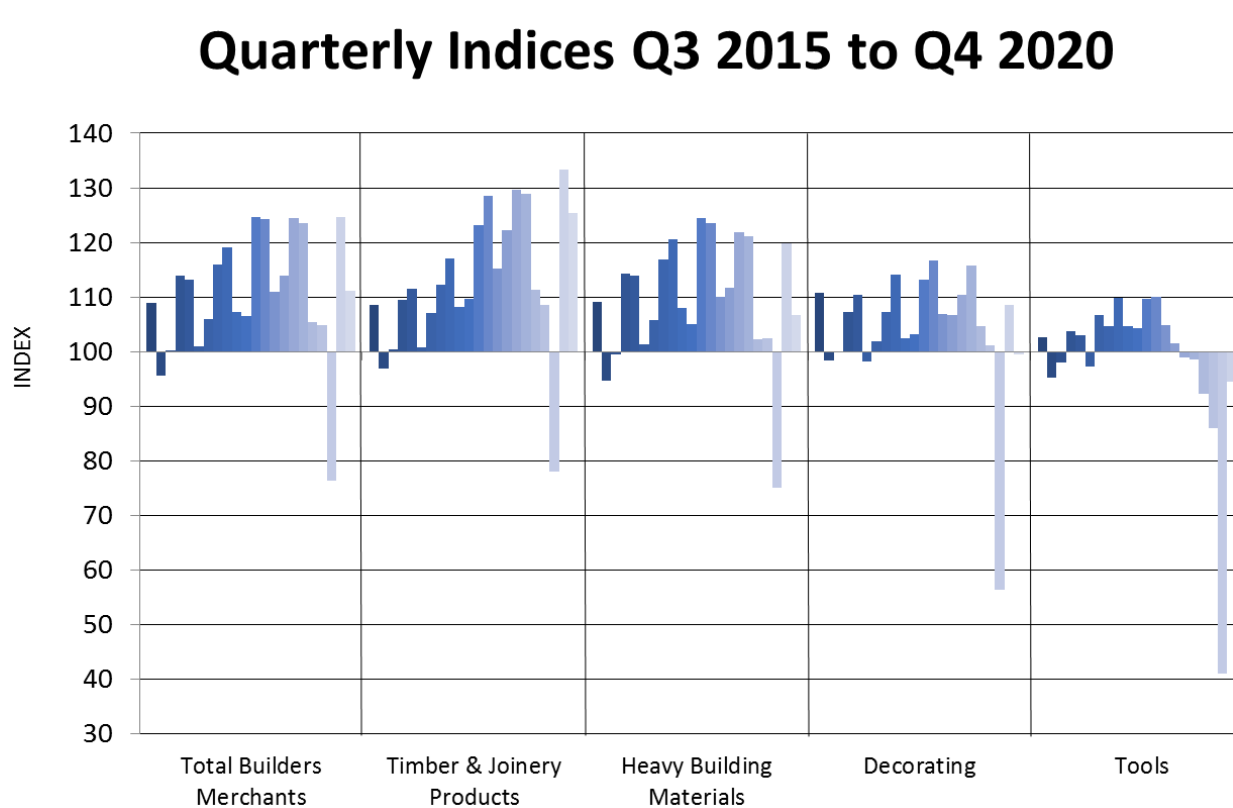


GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Index and Categories

Quarterly indices

Quarterly Indices Q3 2015 to Q4 2020

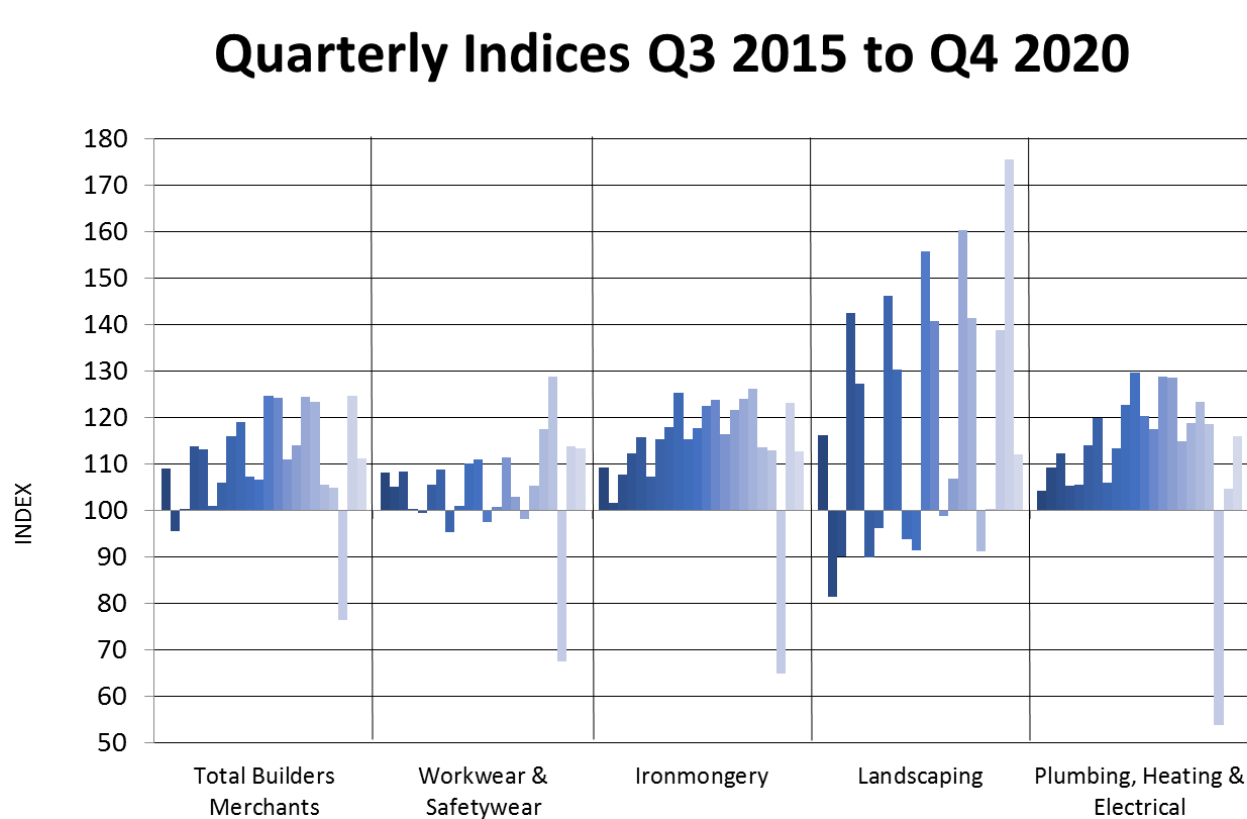


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Index and Categories

Quarterly indices

Quarterly Indices Q3 2015 to Q4 2020



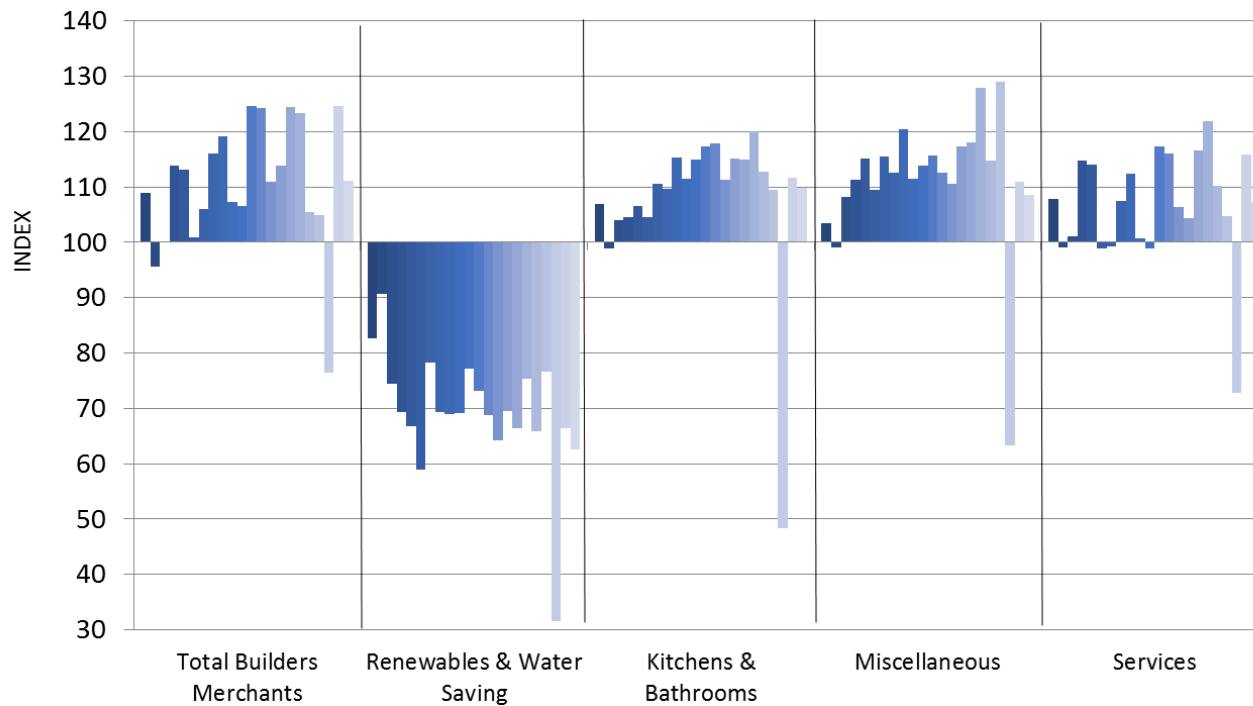
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Index and Categories

Quarterly indices



Quarterly Indices Q3 2015 to Q4 2020

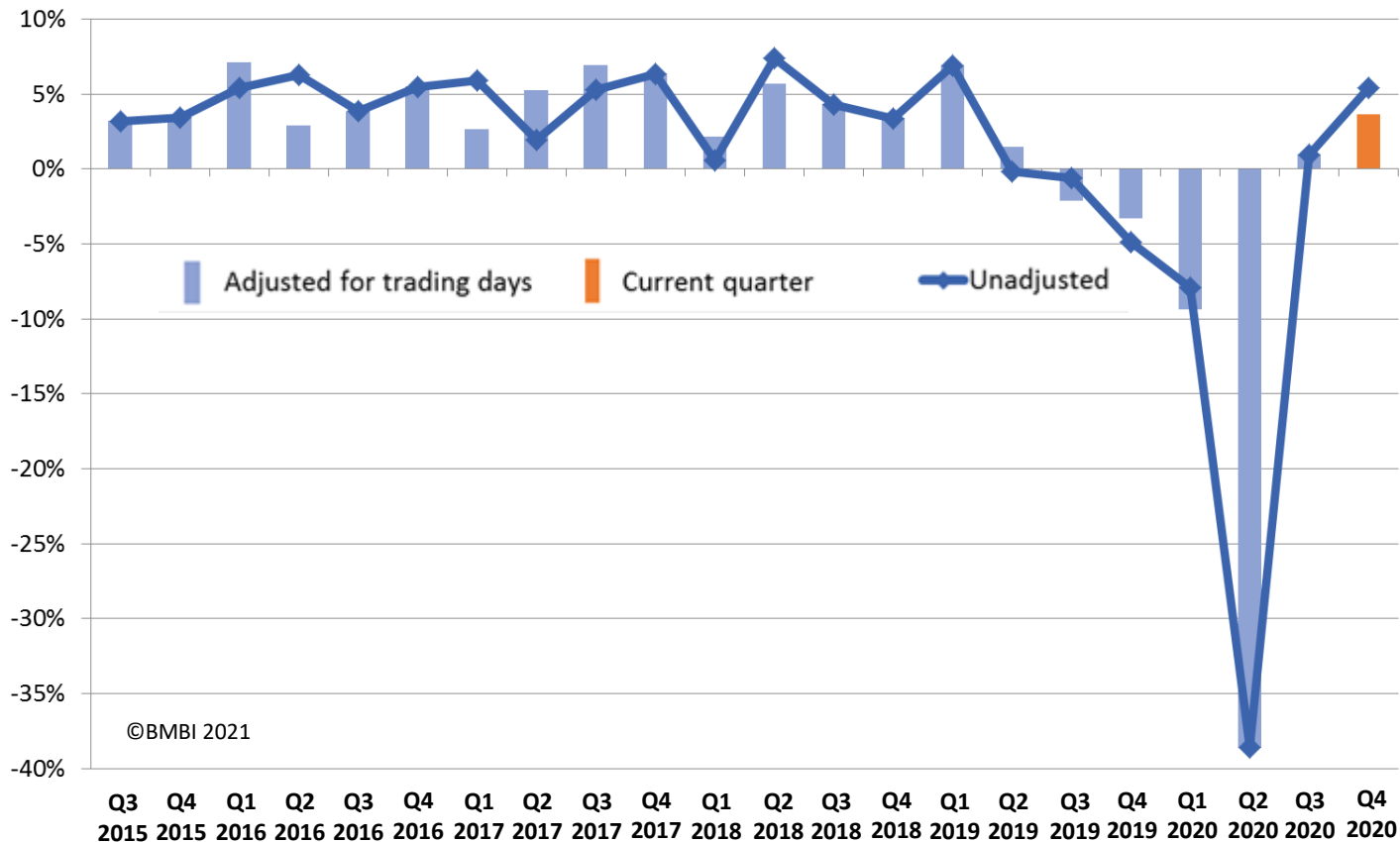


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year

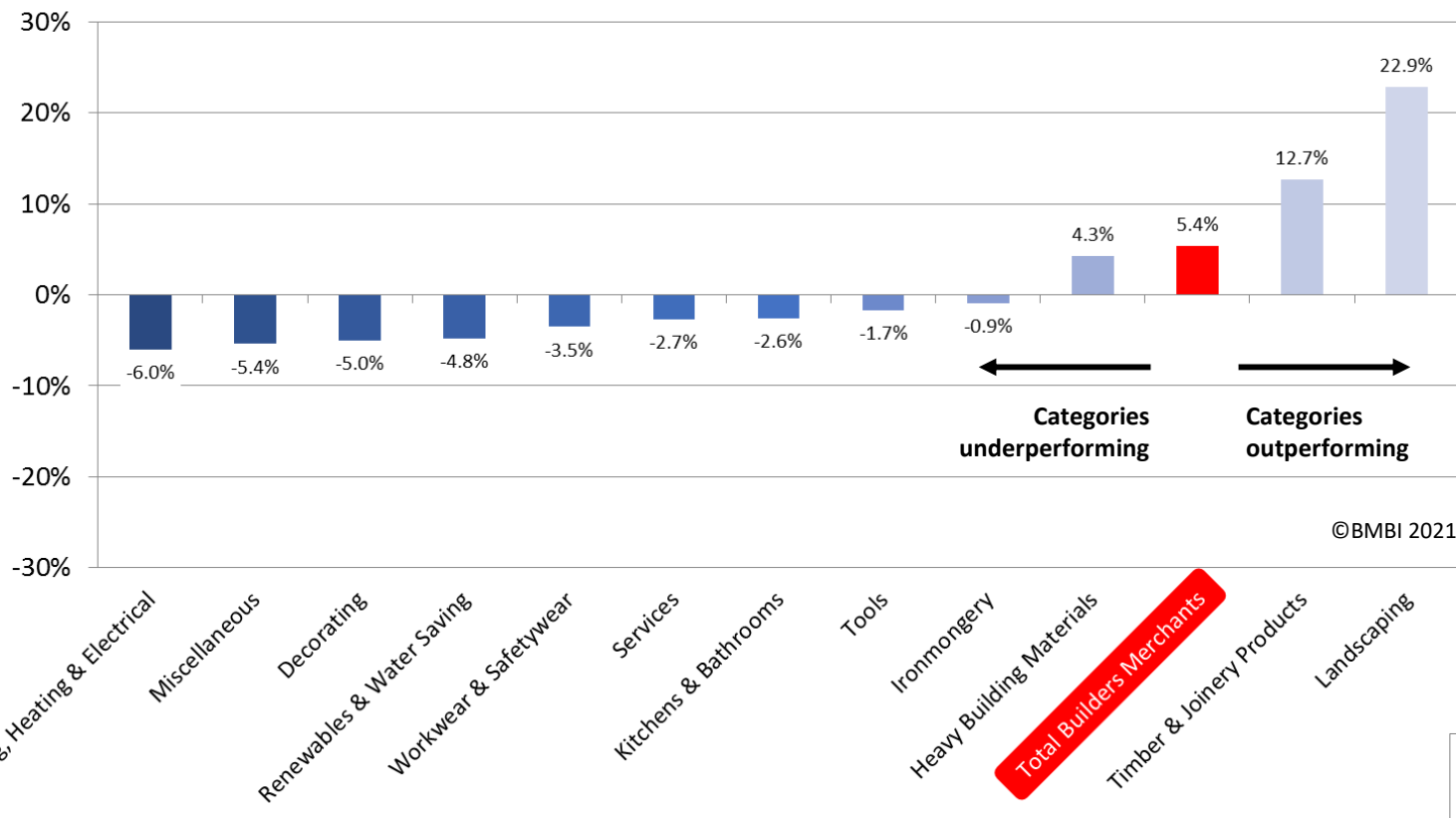


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: This Year v Last Year

Q4 2020 sales indices

Quarter 4 2020 index v Quarter 4 2019 index



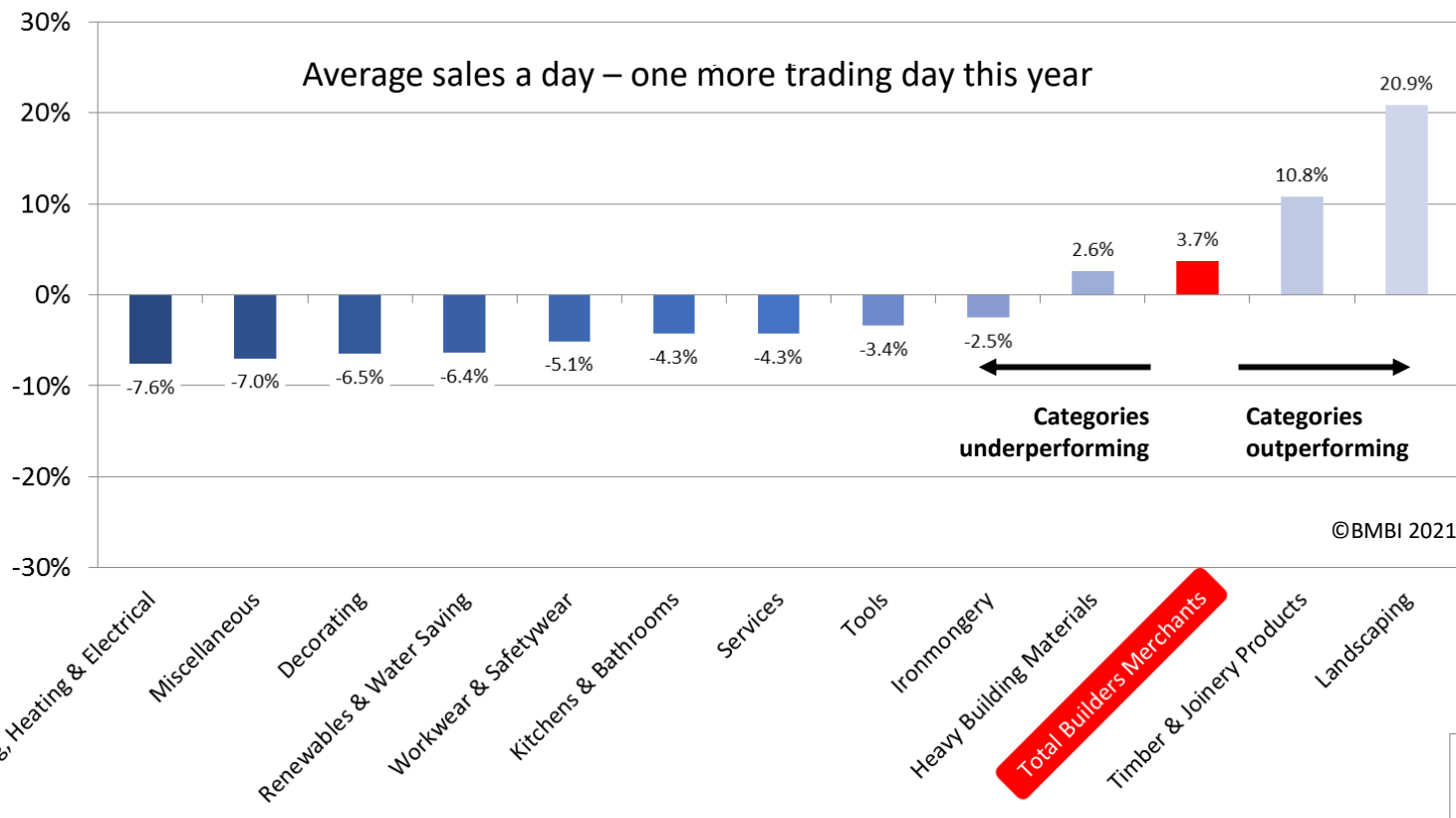
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: This Year v Last Year

Q4 2020 average sales a day indices

Quarter 4 2020 index v Quarter 4 2019 index

Average sales a day – one more trading day this year

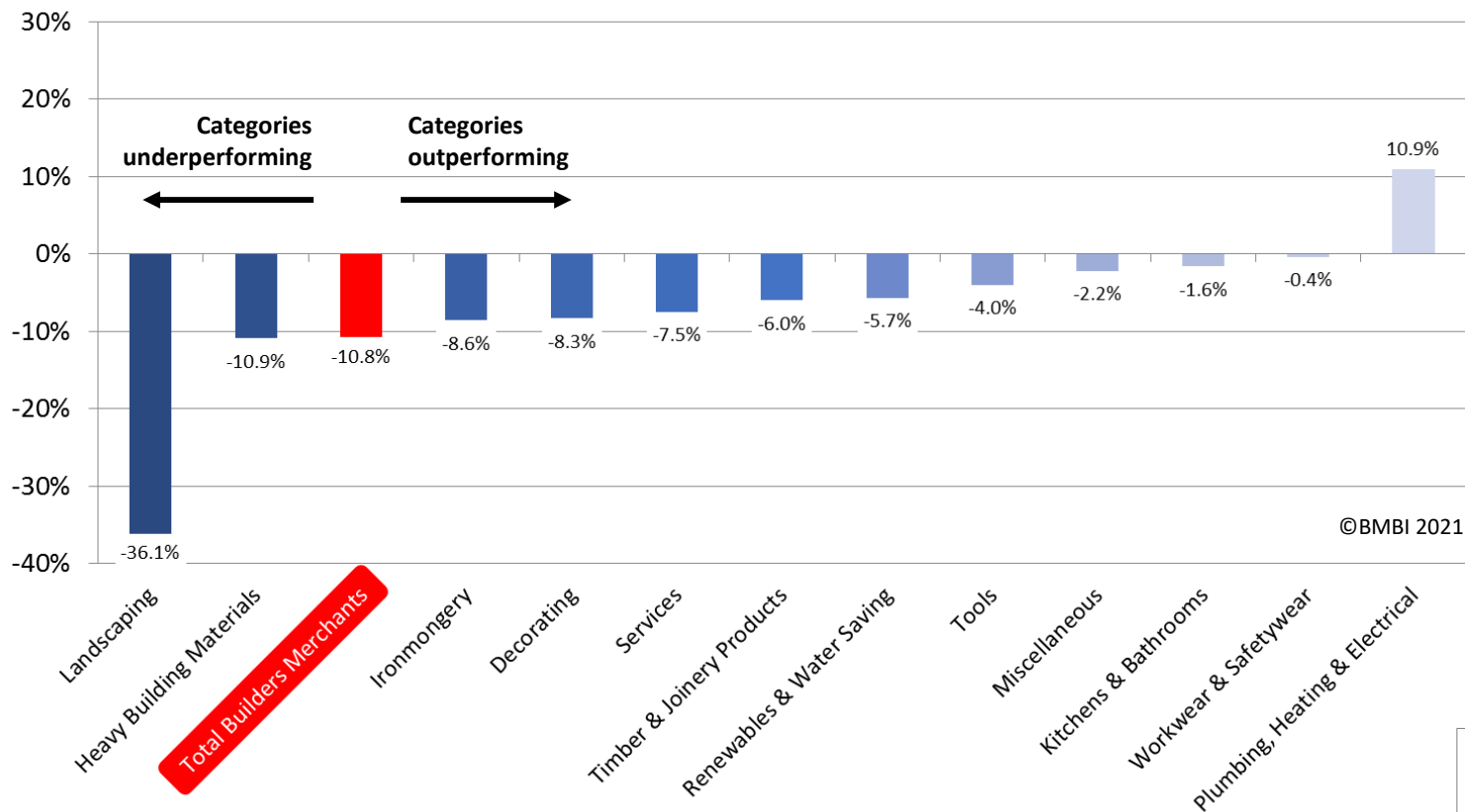


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Quarter on Quarter

Q4 2020 sales indices

Quarter 4 2020 index v Quarter 3 2020 index

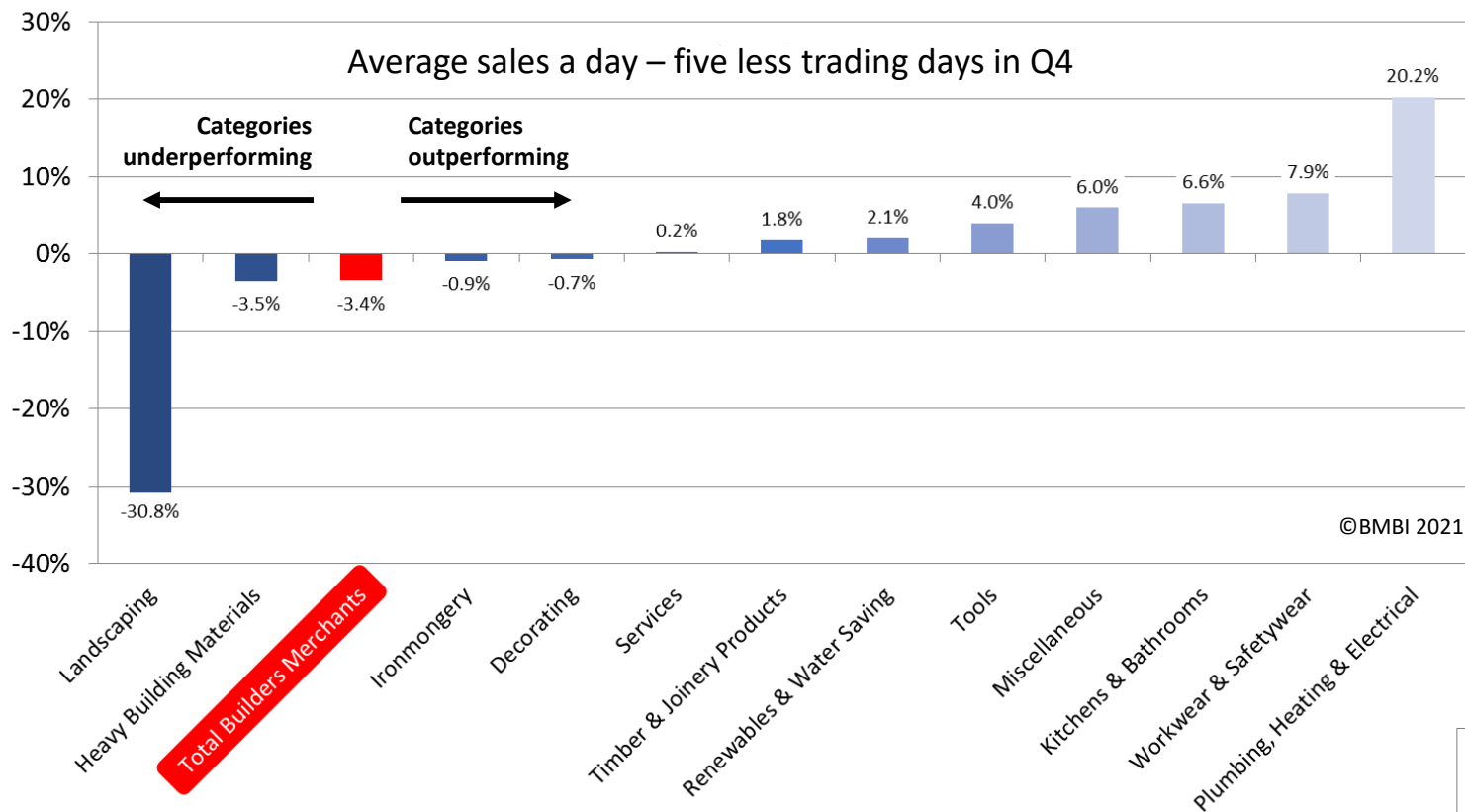


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Quarterly: Quarter on Quarter

Q4 2020 average sales a day indices

Quarter 4 2020 index v Quarter 3 2020 index

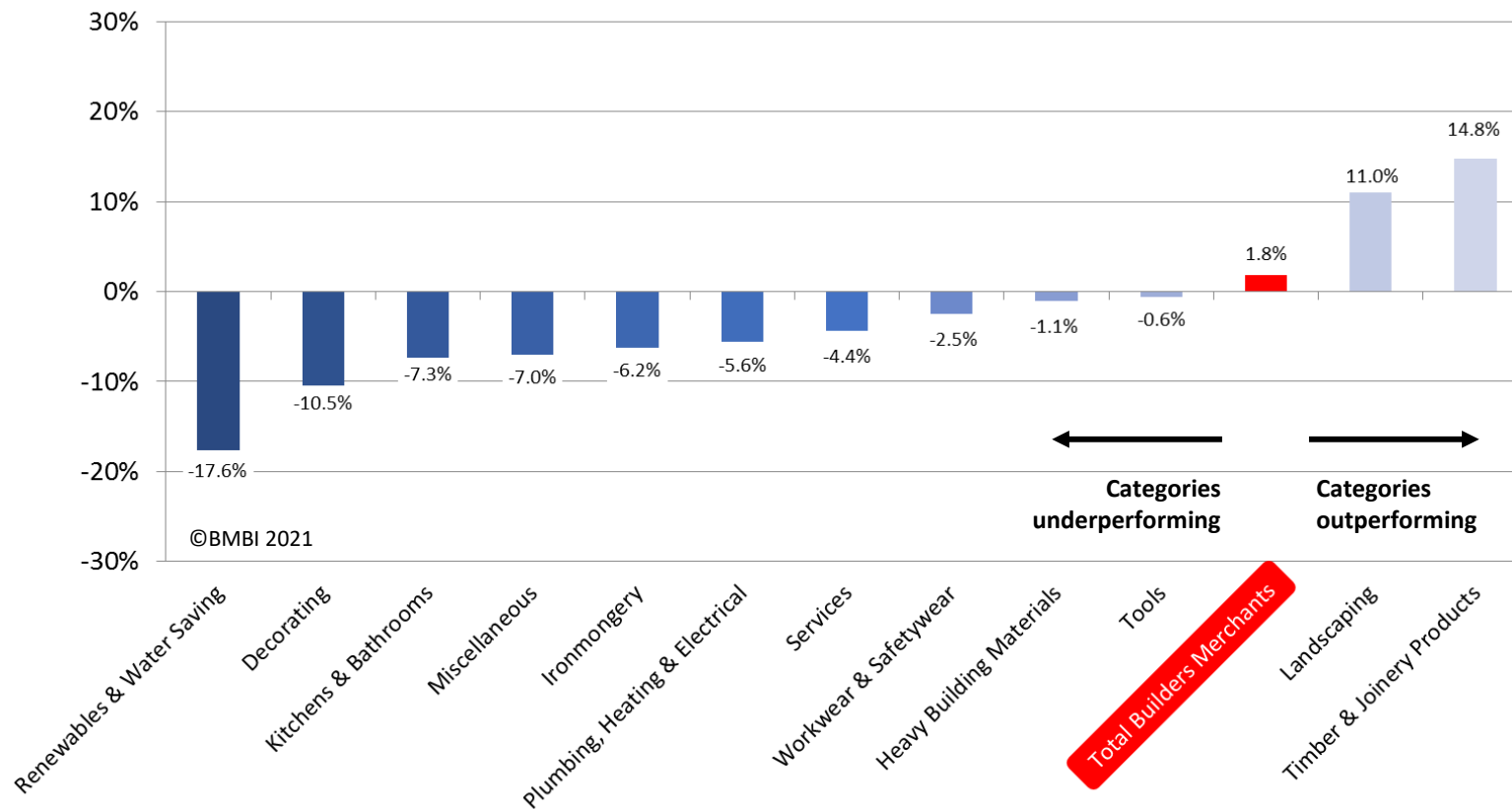



Source: GfK's
Builders Merchants
Total Category Report
July 2015 to December 2020

Latest 3 months: v last year

December to February sales indices

3 months Dec 20 to Feb 21 v 3 months Dec 19 to Feb 20

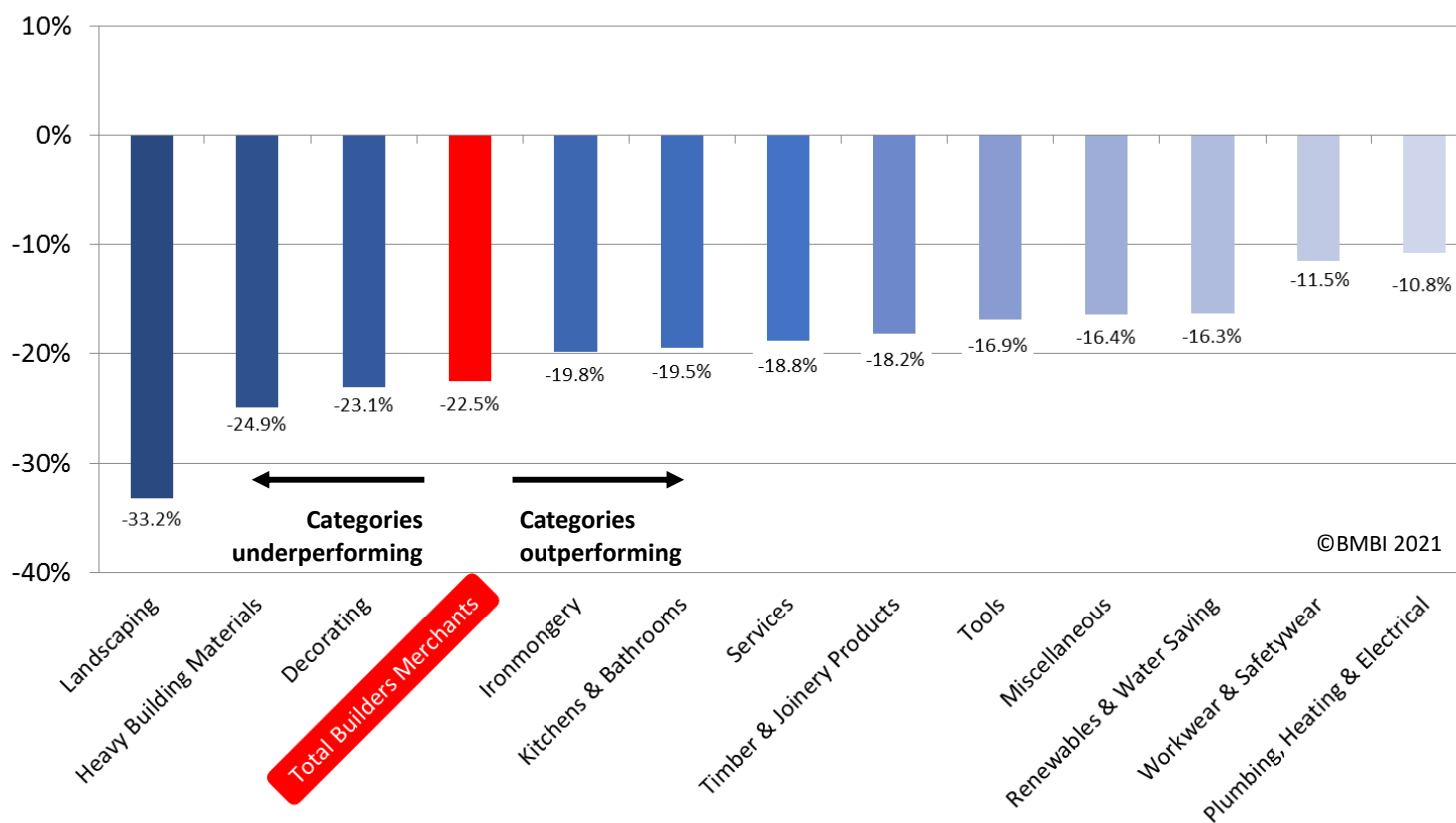


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Latest 3 months: v previous 3 months

December to February sales indices

3 months Dec 20 to Feb 21 v 3 months Sep 20 to Nov 20



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

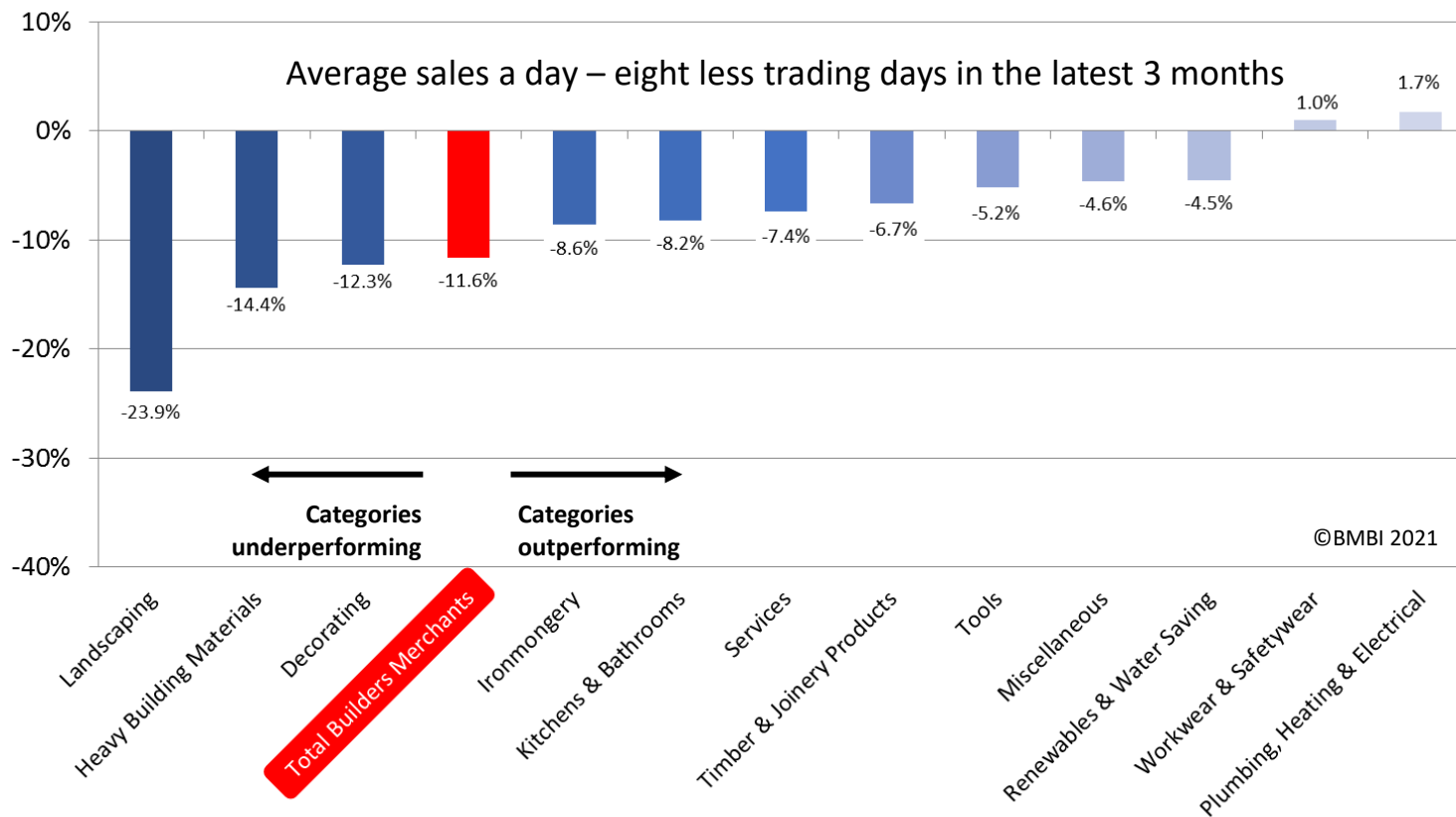
Latest 3 months: v previous 3 months

December to February average sales a day indices

Builders Merchant
Building Index



3 months Dec 20 to Feb 21 v 3 months Sep 20 to Nov 20

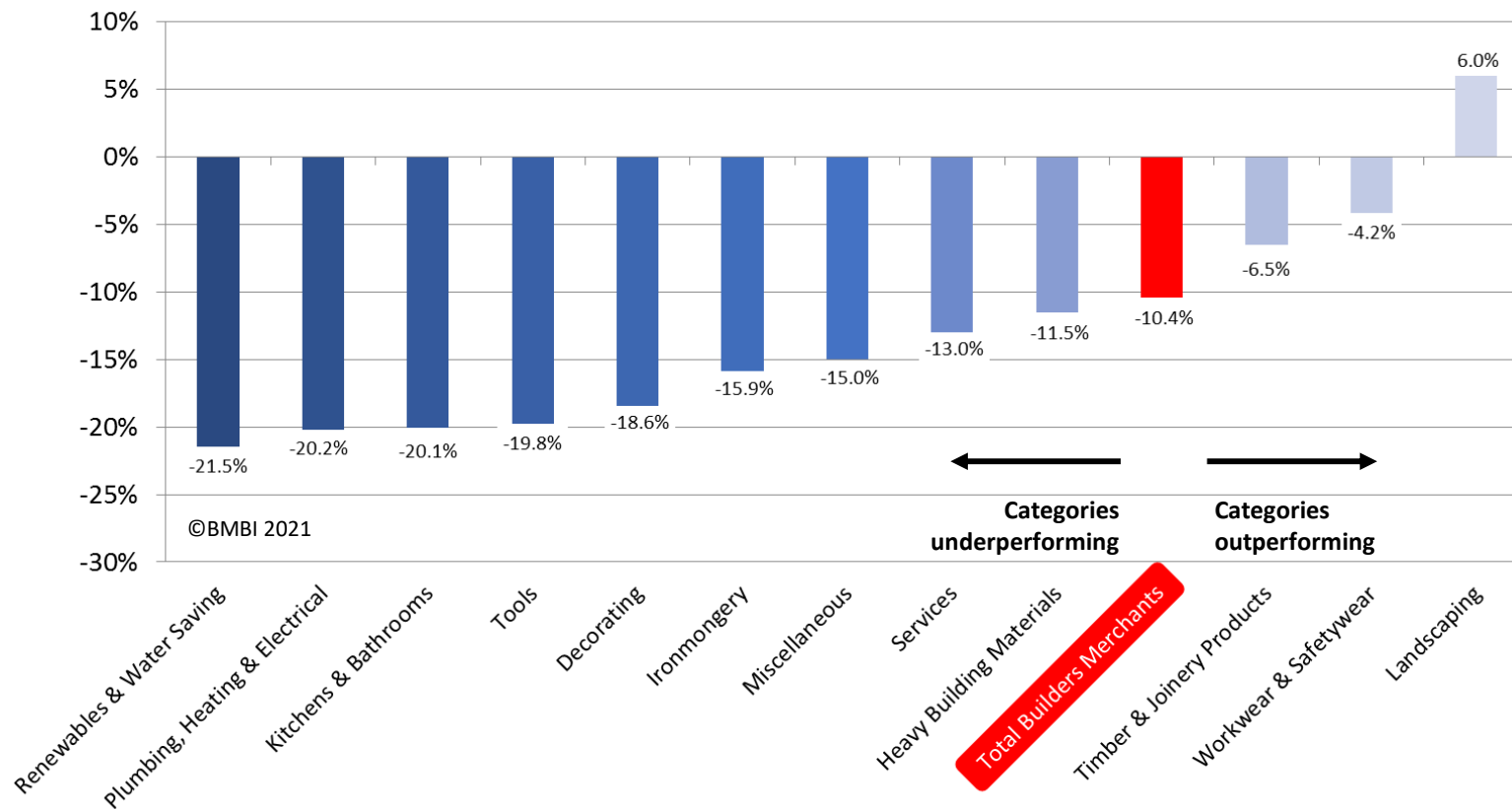



Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Last 12 months: Year on Year

MAT

12 months Mar 20 to Feb 21 v 12 months Mar 19 to Feb 20

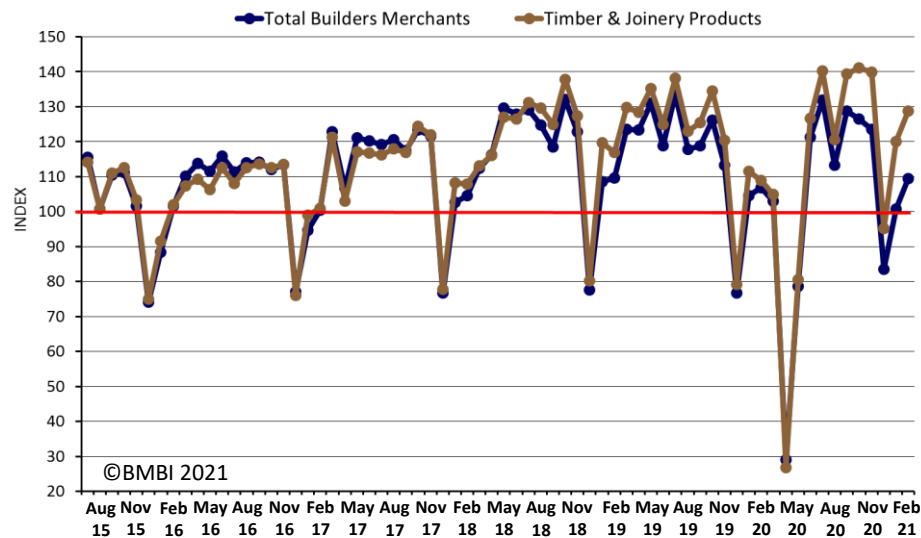


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to February 2021

Monthly: Indices

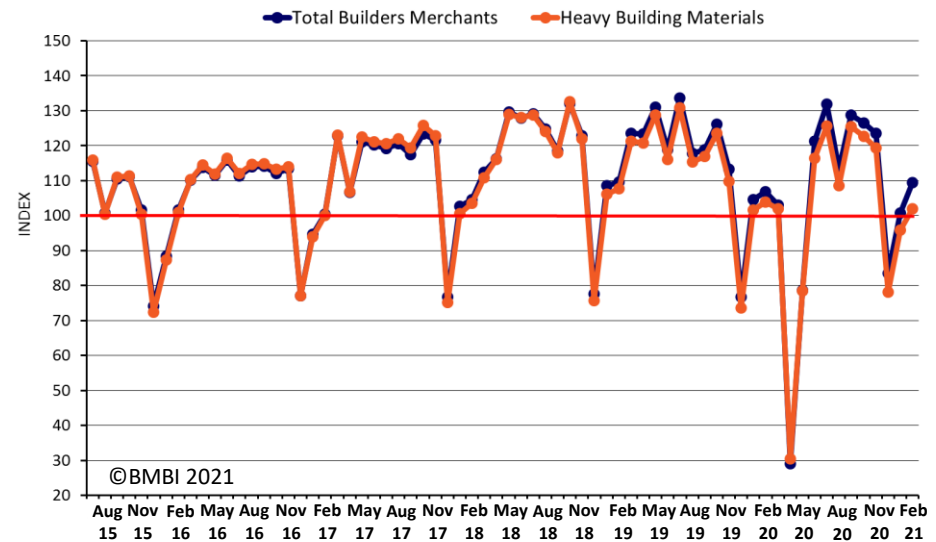
February 2021

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



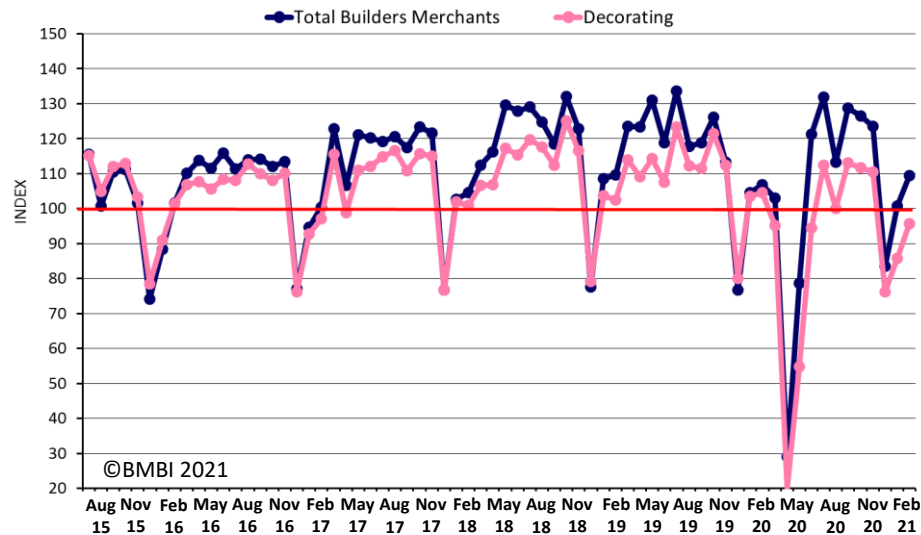
Indexed on July 2014 – June 2015

Monthly: Indices

February 2021

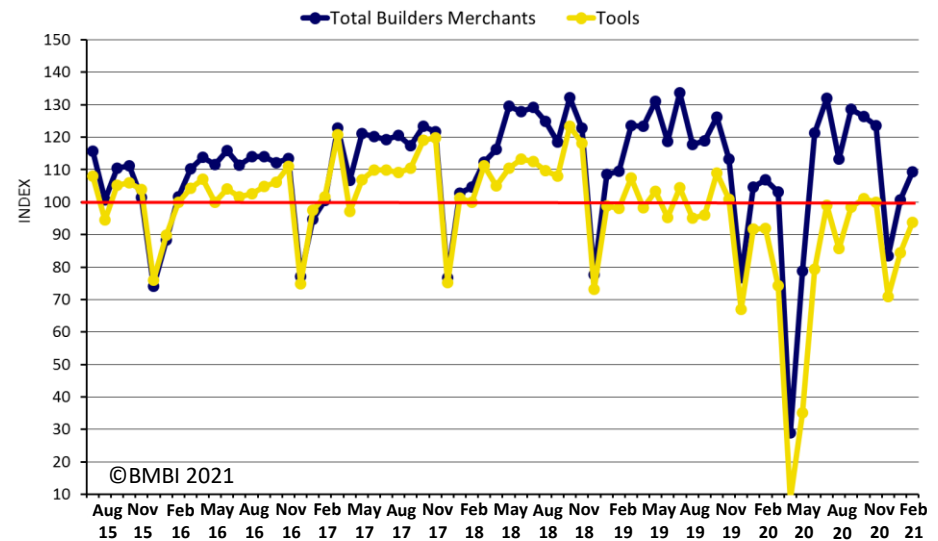


Decorating



Indexed on July 2014 – June 2015

Tools



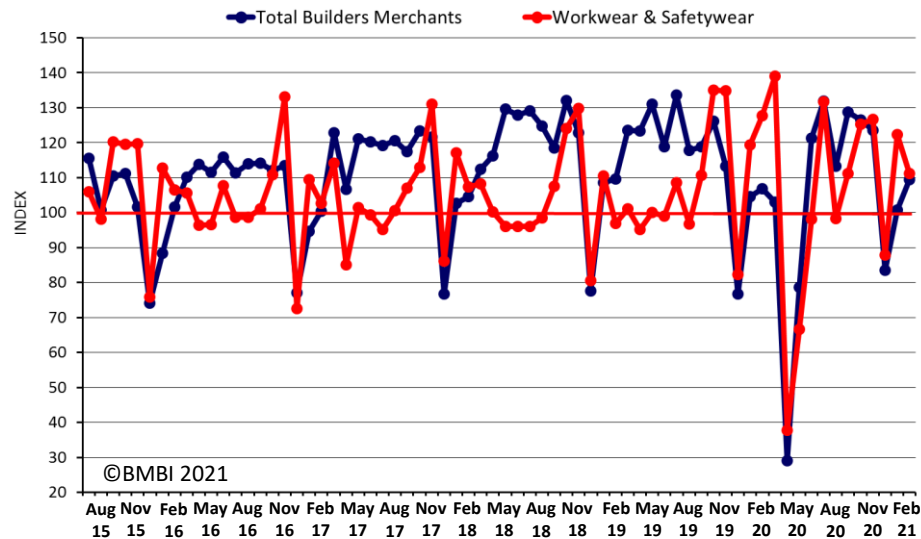
Indexed on July 2014 – June 2015

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

Monthly: Indices

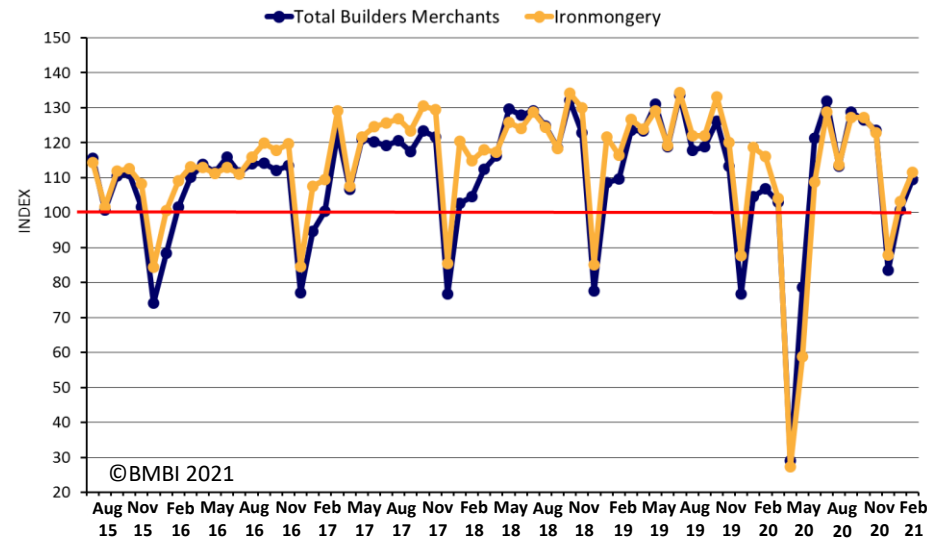
February 2021

Workwear & Safetywear



Indexed on July 2014 – June 2015

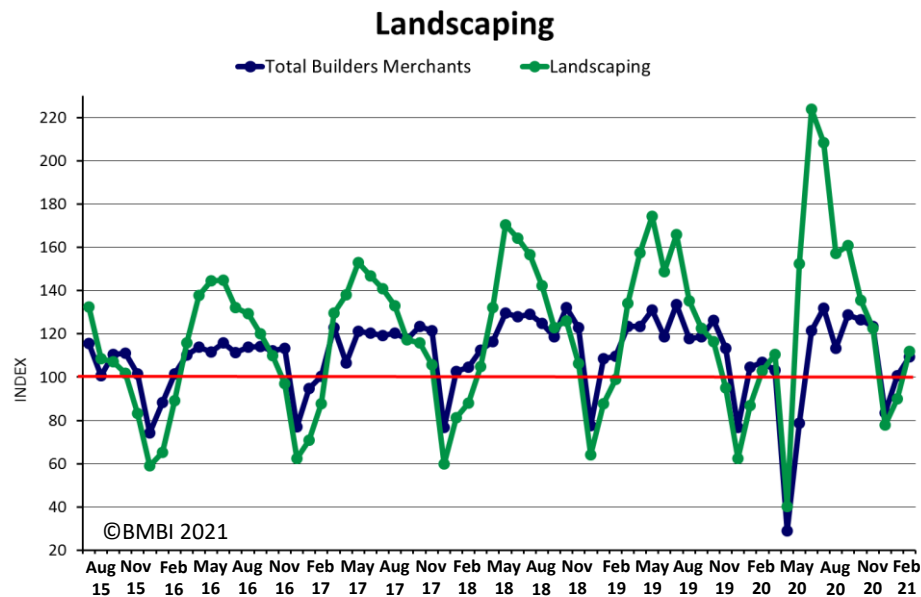
Ironmongery



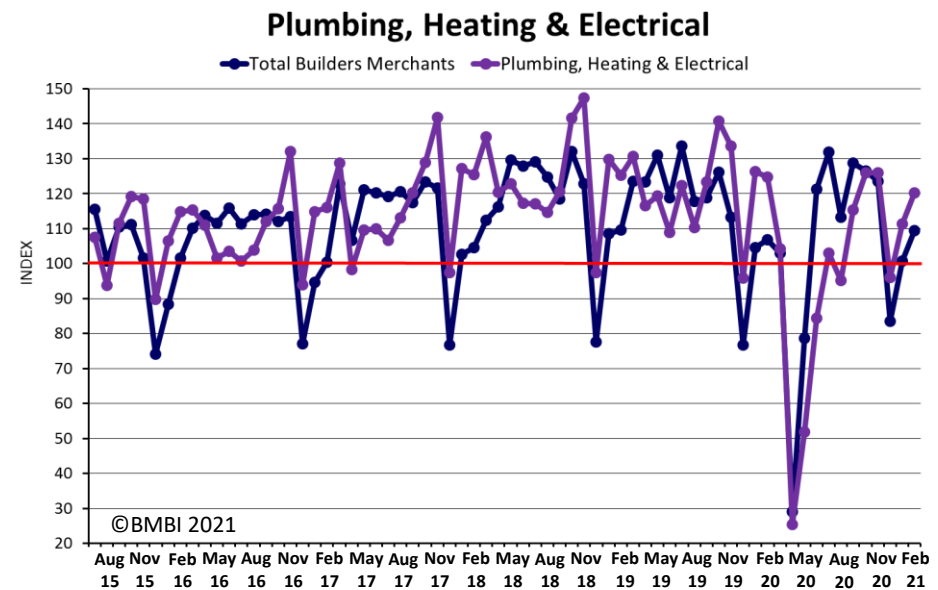
Indexed on July 2014 – June 2015

Monthly: Indices

February 2021



Indexed on July 2014 – June 2015



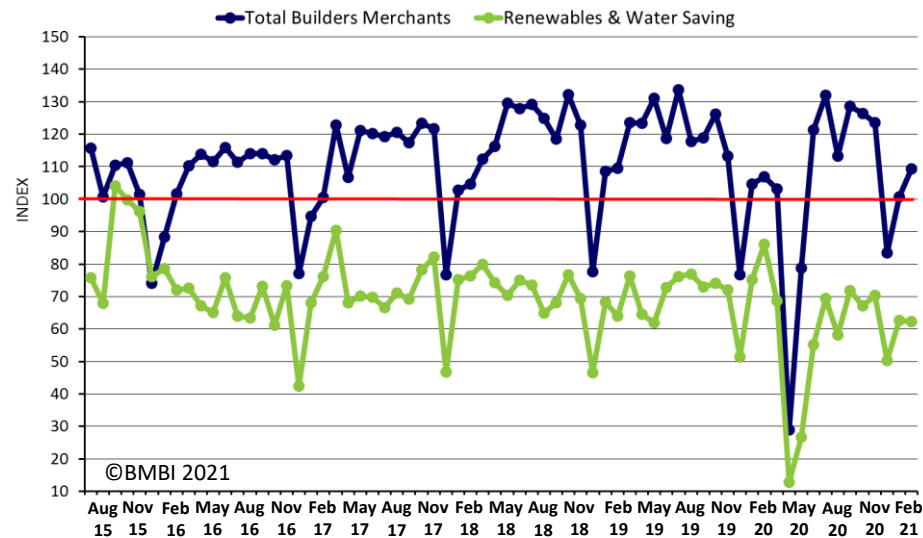
Indexed on July 2014 – June 2015

Monthly: Indices

February 2021

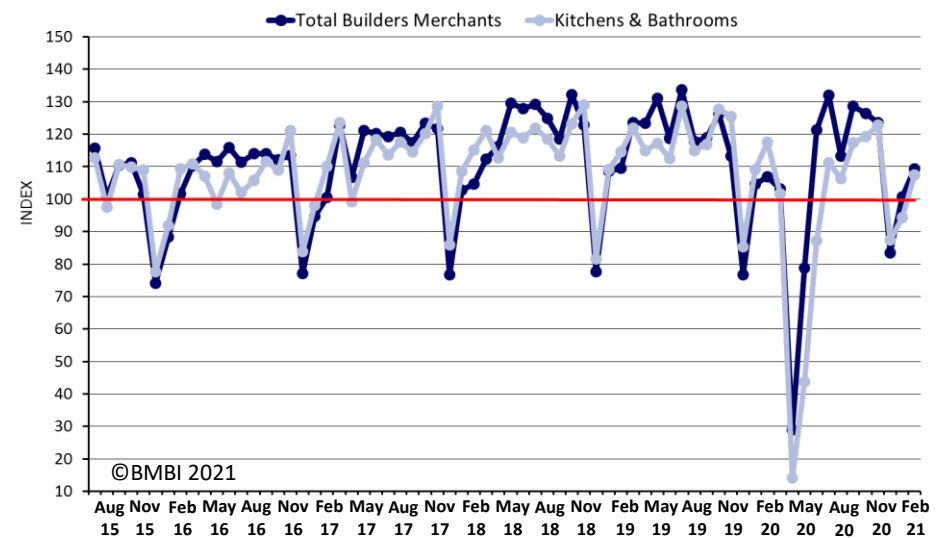


Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



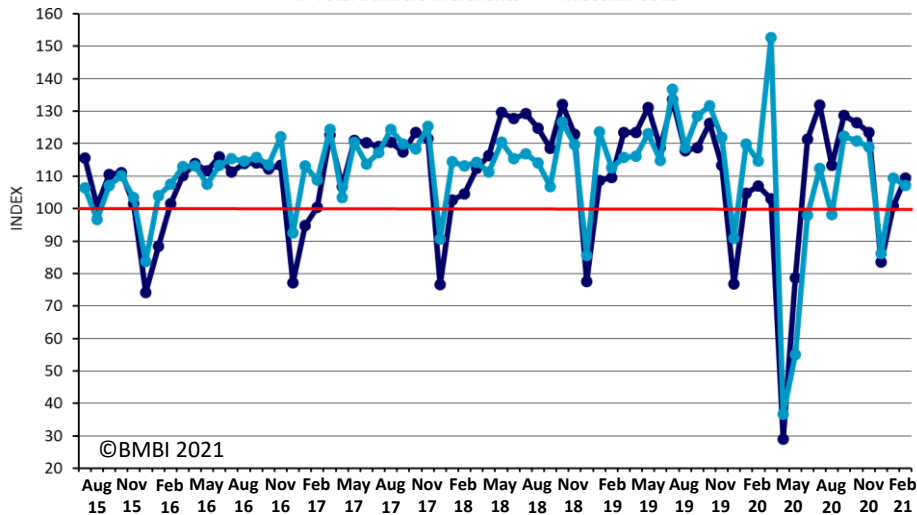
Indexed on July 2014 – June 2015

Monthly: Indices

February 2021

Miscellaneous

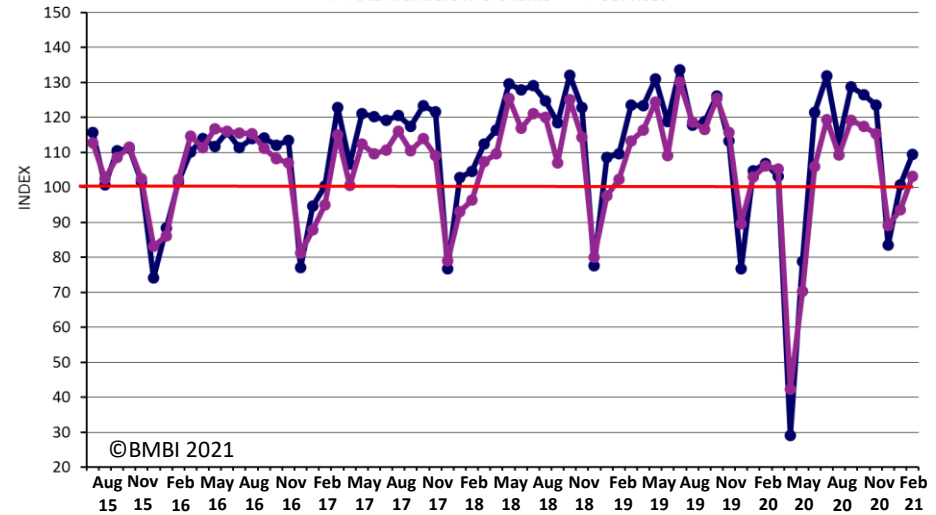
— Total Builders Merchants — Miscellaneous



Indexed on July 2014 – June 2015

Services

— Total Builders Merchants — Services



Indexed on July 2014 – June 2015

Trading Days

Monthly

Index: 20.8

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

Quarterly

Index: 62.3

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

Half Year

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

Full Year

2016
250
2017
249
2018
249
2019
248
2020
250
2021

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

GfK's Definition of Builders Merchant Panel



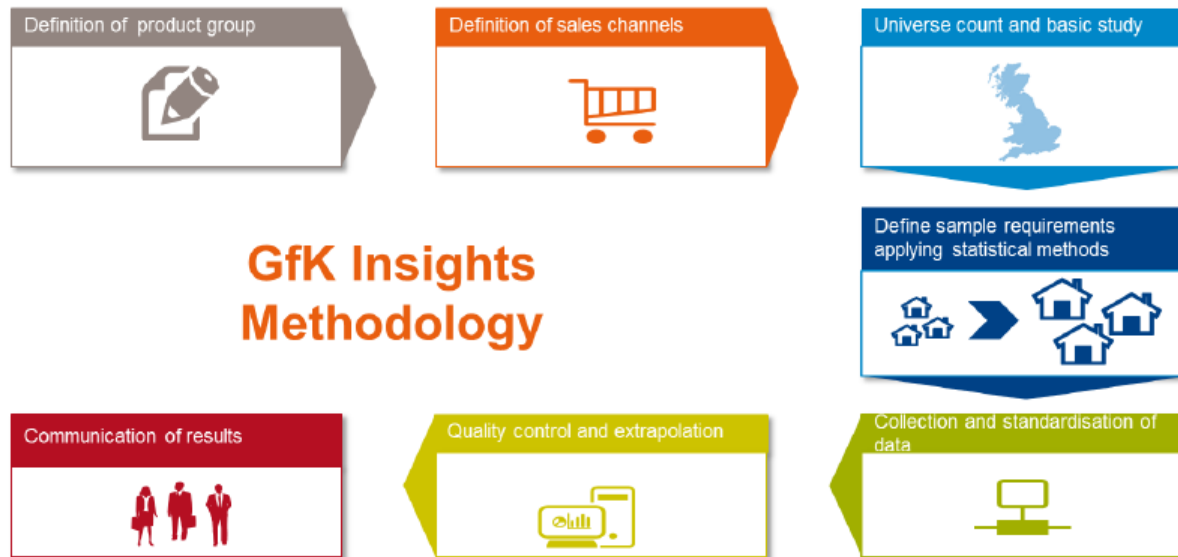
Generalist Builders Merchants definition:

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

Examples include:



GfK Insights Methodology



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

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

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

GfK's Product Categories

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



Headline values available

Timber & Joinery Products

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

Heavy Building Materials

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

Decorating

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

Tools

Hand Tools
Power Tools
Power Tool Accessories
Ladders & Access Equipment

Workwear And Safetywear

Clothing
Safety Equipment

Ironmongery

Fixings And Fastenings
Security
Other Ironmongery

Landscaping

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

Plumbing Heating & Electrical

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

Renewables And Water Management

Water Saving
Renewables & Ventilation

Kitchens & Bathrooms

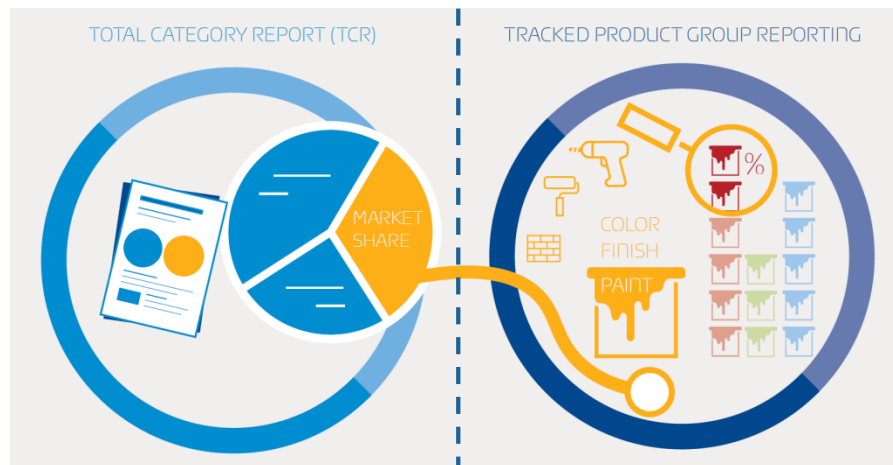
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

Miscellaneous

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

Services

Toolhire / Hire Services
Other Services



In-depth product group reporting

Monthly sales values, volumes, pricing analysis & distribution facts available by brand and key product features.

For insights on your product group please contact Emile van der Ryst at GfK

emile.van-der-ryst@gfk.com

Available categories:

Heavyside

Bricks
Insulation

Lightside

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

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in materials supply”

Plumbing & Heating Merchant Index



February 2021

(Published 21 April 2021)

A Builders Merchant Building Index Publication

Introduction:

Plumbing & Heating Merchant Index



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

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

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

PHMI Experts

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

More data available

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

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

Plumbing and heating merchants sales increase in February 2021

February 2021 plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 1.2% on February 2020, with no difference in trading days. (See [page 48](#)). This is an improvement on last month with January 2021 sales 5.0% lower than in January 2020.

Value sales in February 2021 were 3.0% higher than in January ([page 50](#)), with no difference in trading days.

The last three months (December 2020 to February 2021) saw sales 0.2% lower than in the same three months a year earlier, with no difference in trading days ([page 49](#)).

Comparing the same three months (December 2020 to February 2021) with the previous three months (September to November 2020) there was a larger fall of 13.3% ([page 51](#)). However there were eight fewer trading days in the most recent period and taking these into account average sales a day were 1.1% lower than in September to November. It's also likely the impact of Lockdown 3 (which affected both January and February 2021) affected inside work more than work outside.

January's PHMI Index, which contrasts sales with the base period of January to December 2019, was 102.4 – see the table on [page 46](#) and the chart on [page 47](#). The table also shows the PHMI Index in the last three months (November 2020 to January 2021) was marginally weaker, at 95.2, but with five less trading days.

February 2021 plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 1.2% on February 2020. This is an improvement on last month, with January 2021 sales 5.0% lower than in January 2020.

Indices: Monthly and quarterly

March 2020 to February 2021

(Indexed on January to December 2019)

Plumbing & Heating
Merchant Index



Mar 20	Apr 20	May 20	Three months
93.8	34.8	46.0	58.2
Jun 20	Jul 20	Aug 20	Three months
73.4	88.3	85.9	82.5
Sep 20	Oct 20	Nov 20	Three months
103.0	115.2	111.1	109.8
Dec 20	Jan 21	Feb 21	Three months
83.9	99.4	102.4	95.2

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

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

- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, October's index of 115.2 means turnover was 15.2% above the base period.
- Values below 100 indicate lower turnover in that period. May's Index of 46.0 means turnover was 54.0% lower than the base period.



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

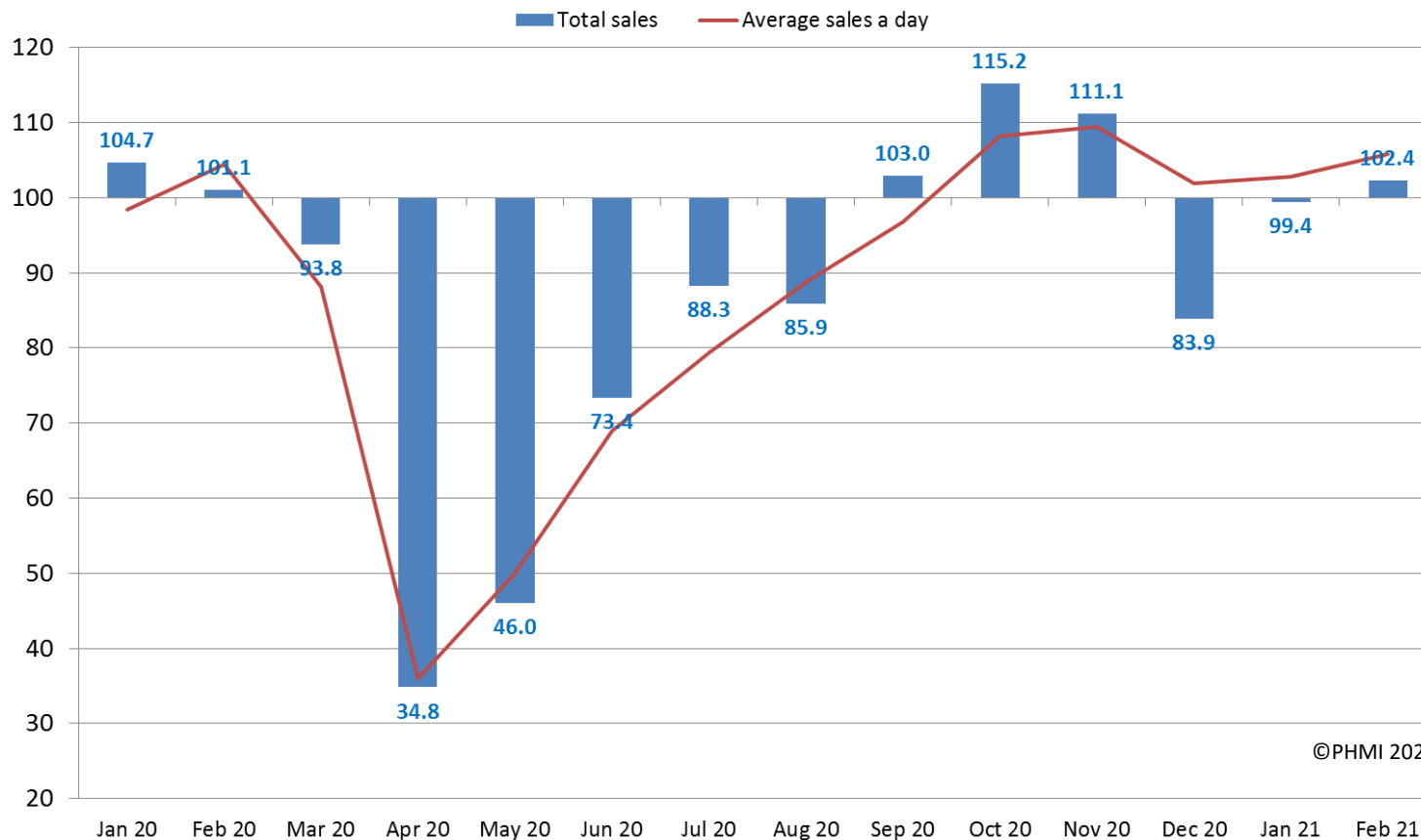
Monthly: Index

Adjusted and unadjusted for trading days*

Plumbing & Heating
Merchant Index



Indices: February 2020 to February 2021



Value figures
shown for Total
sales

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

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

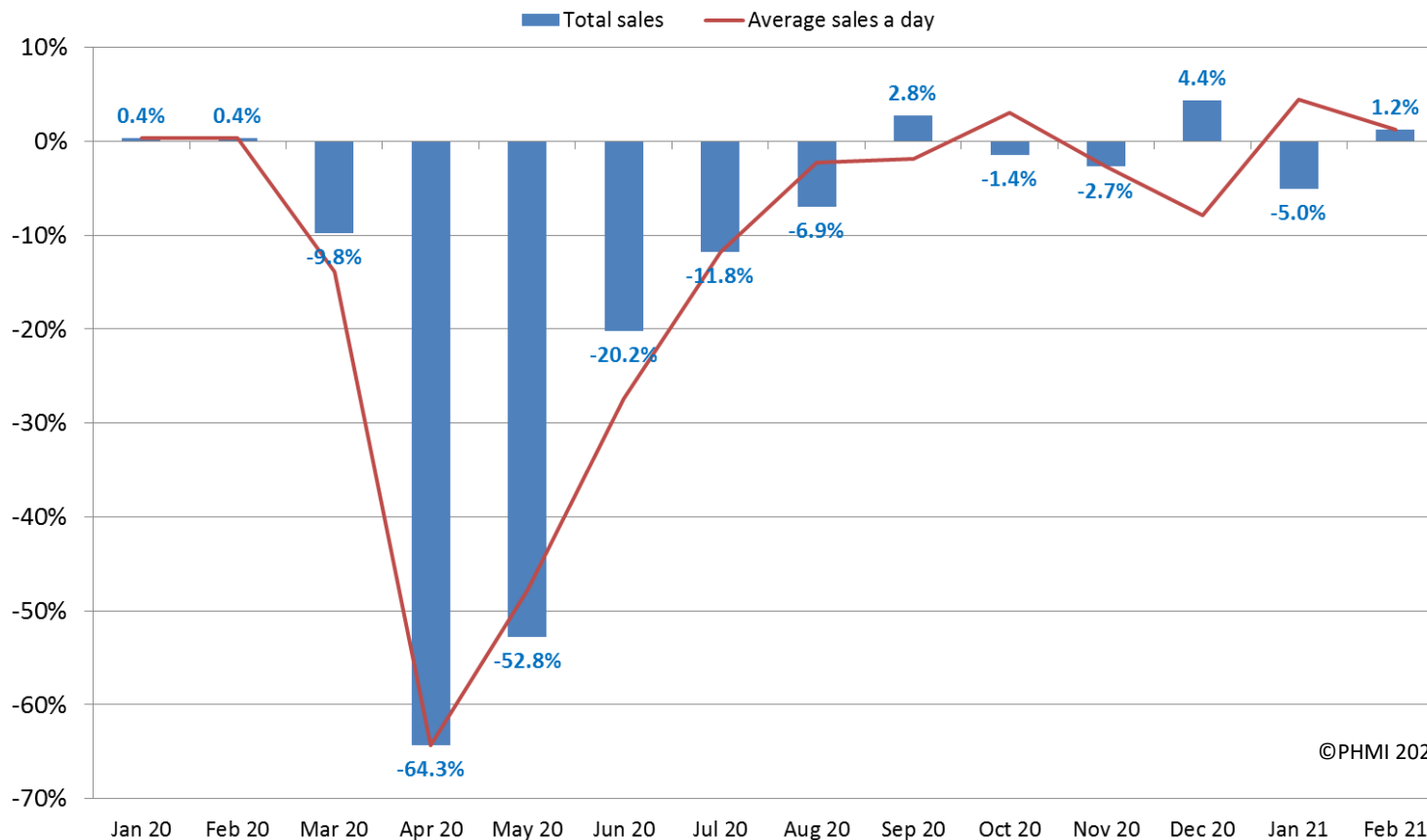
Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Month: year on year



Value figures
shown for Total
sales

©PHMI 2021

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

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

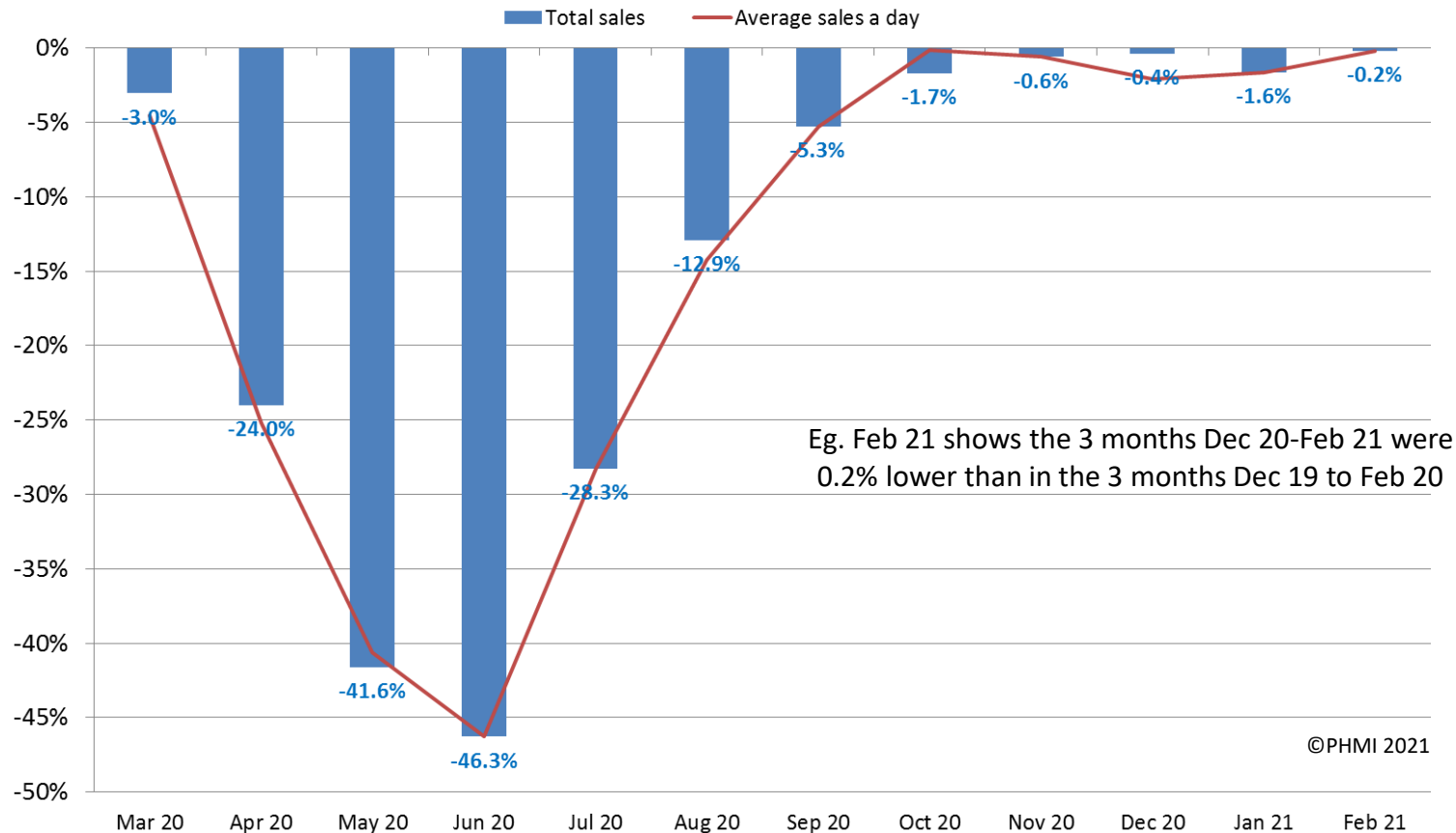
Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Rolling 3 months: year on year



Value figures
shown for Total
sales

*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 Feb 2021

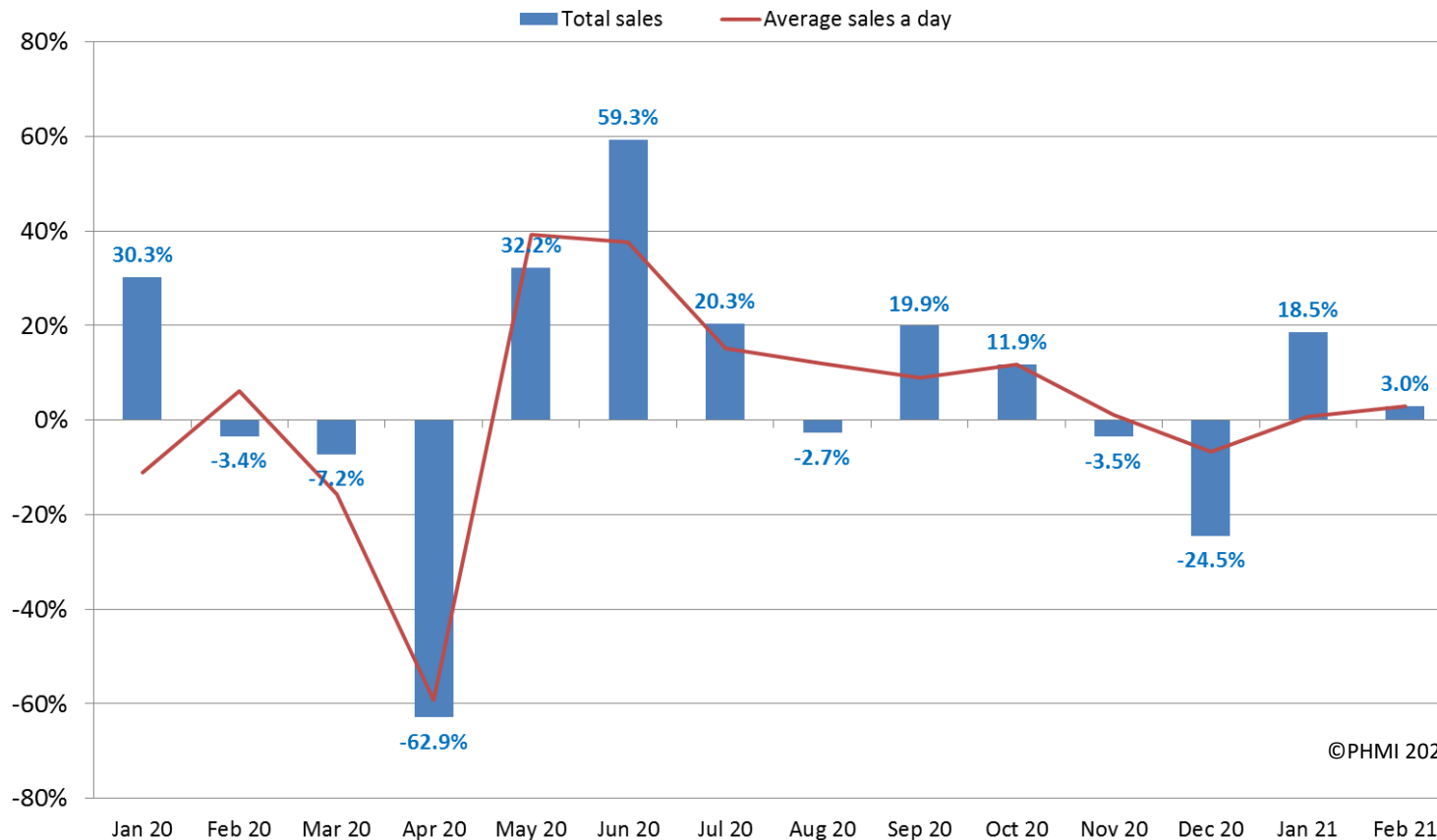
Monthly: Month v previous month

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Month v previous month



Value figures
shown for Total
sales

©PHMI 2021

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

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

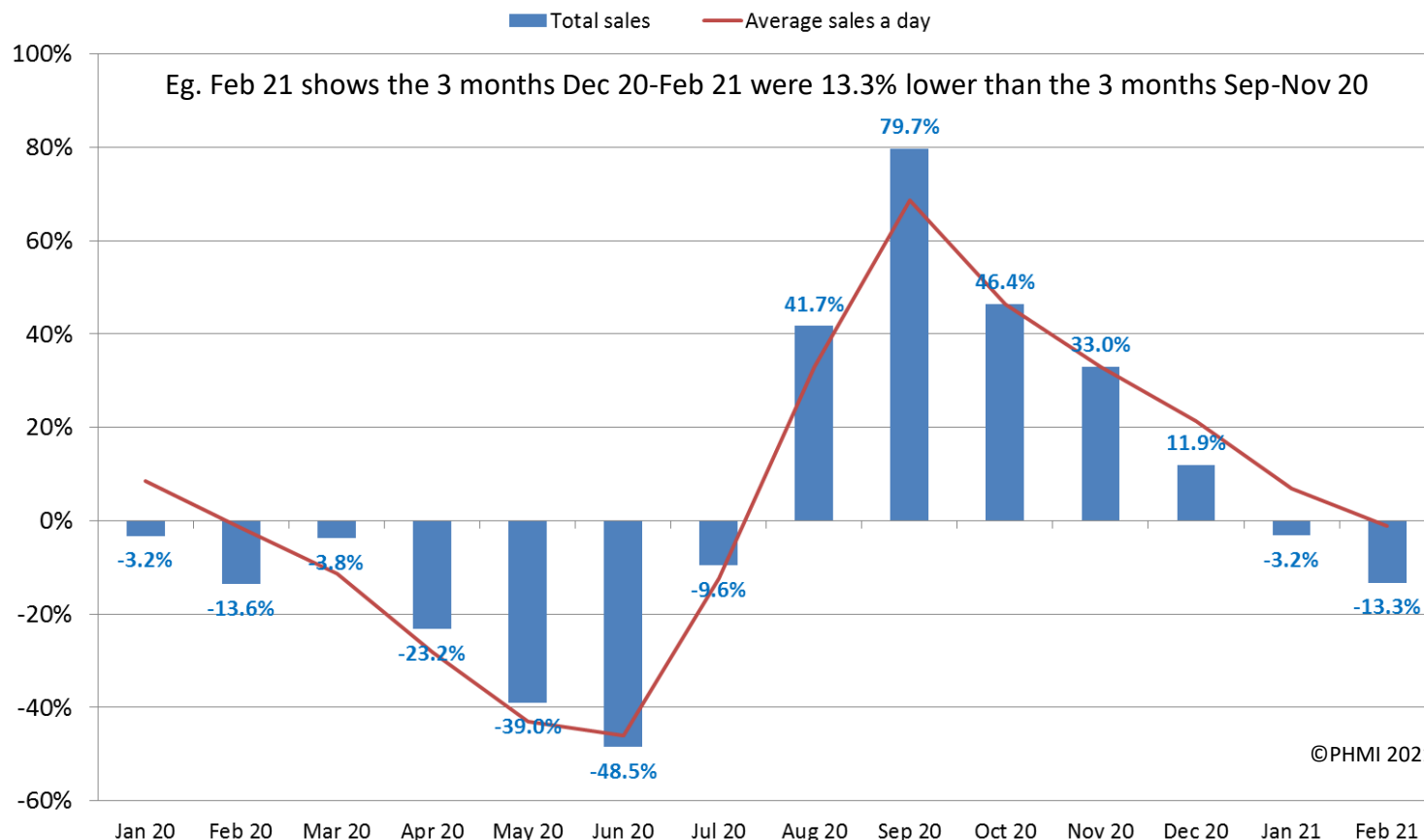
Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Rolling 3 months v previous 3 months



Value figures
shown for Total
sales

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

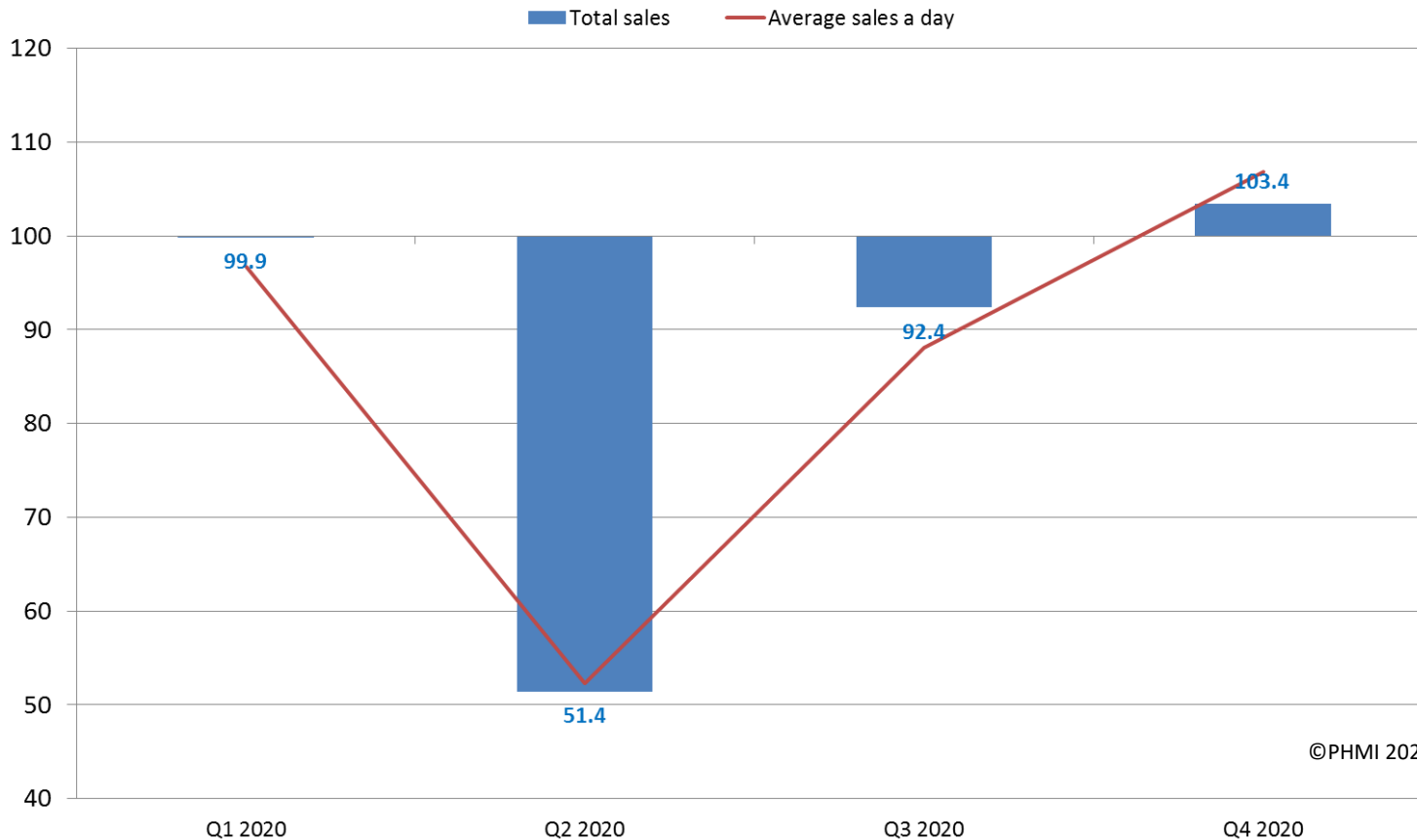
GfK Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Feb 2021

Quarterly: Index

Adjusted and unadjusted for trading days



Indices: Q1 2020 to Q4 2020



Value figures
shown for Total
sales

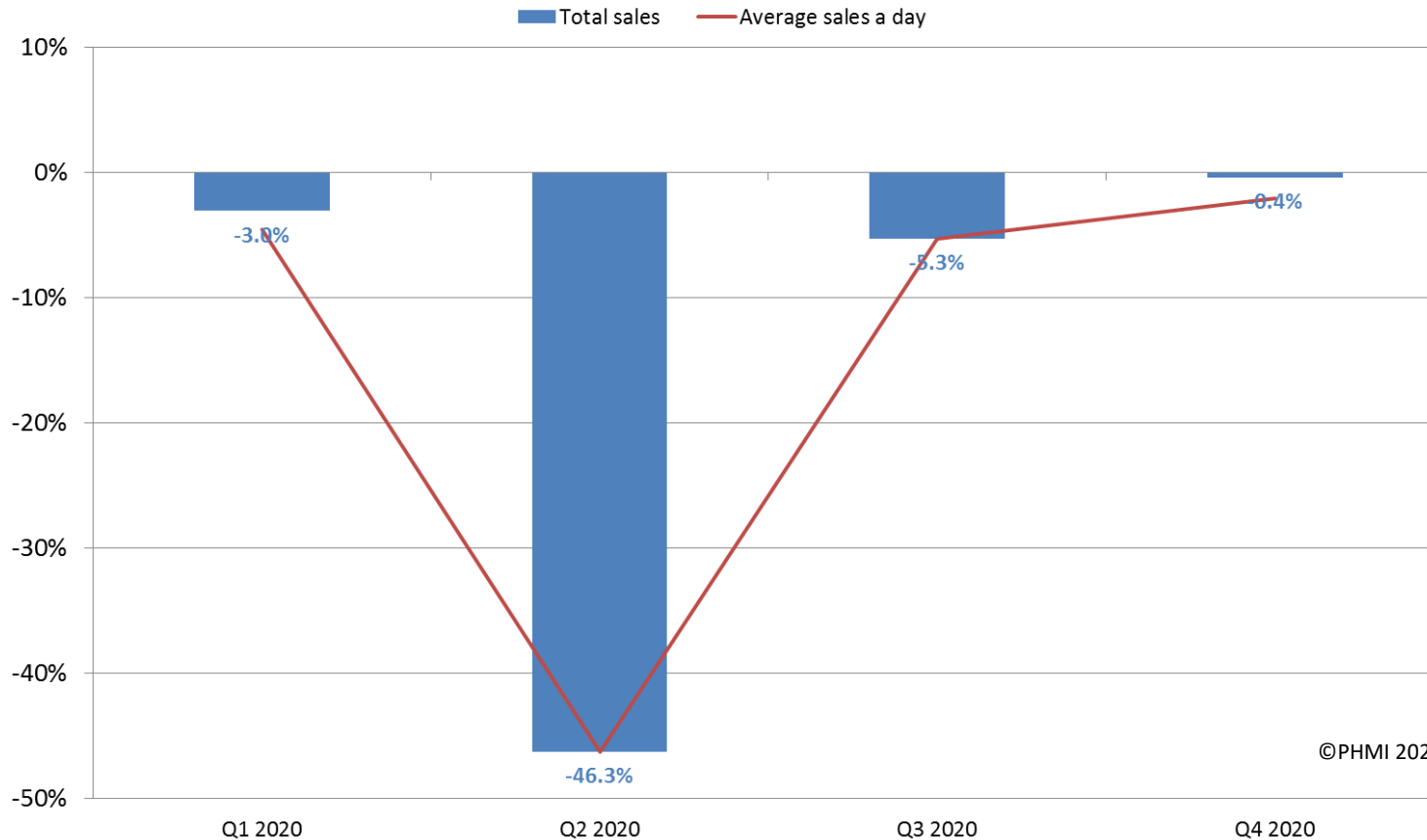
Quarterly: This Year v Last Year

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Quarter: year on year



Value figures
shown for Total
sales

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

GfK Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Dec 2020

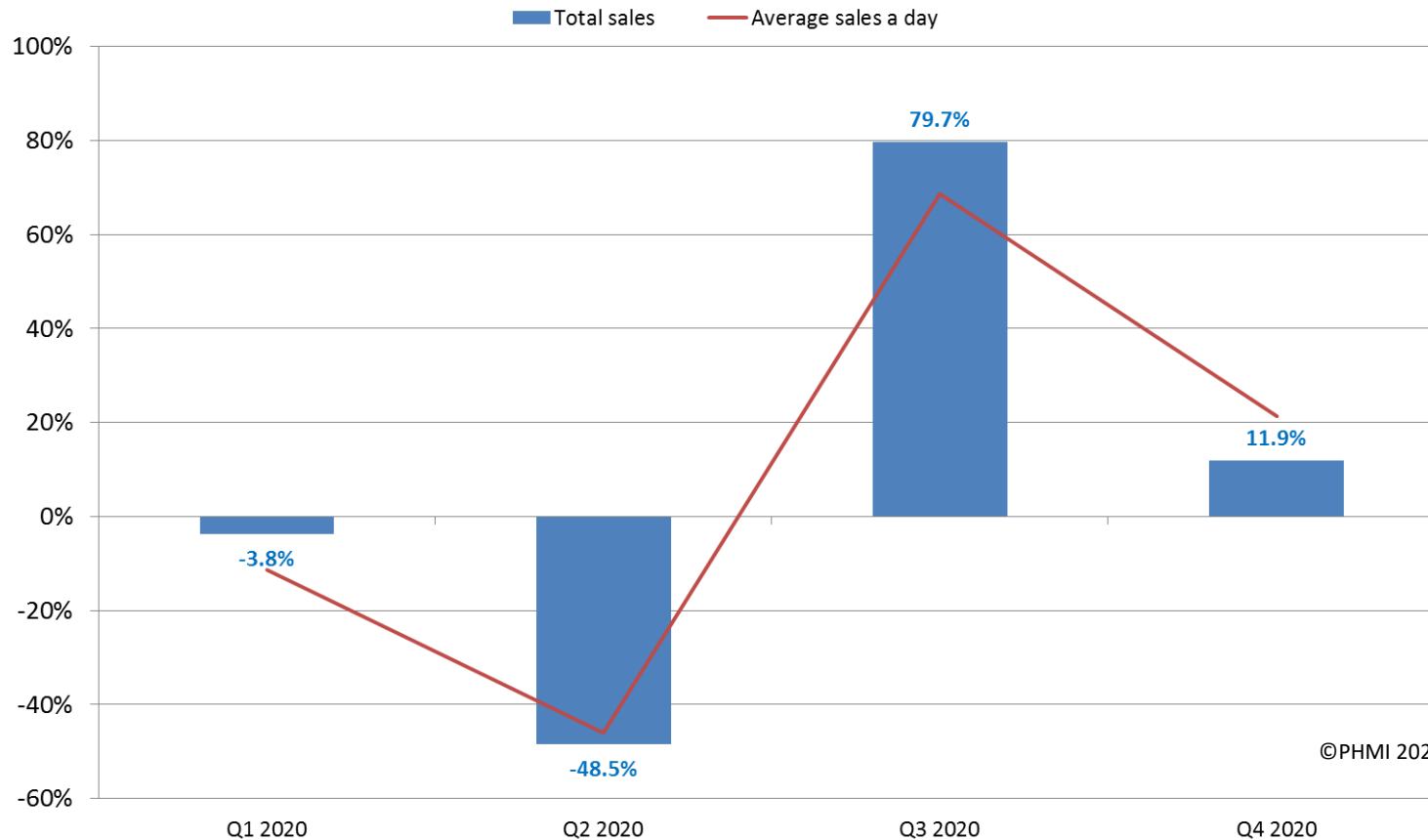
Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted
for trading days

Plumbing & Heating
Merchant Index



Quarter v previous quarter



Value figures
shown for Total
sales

©PHMI 2021



Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Dec 2020

PHMI Trading Days



Monthly Index: 20.8

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

Quarterly Index: 62.3

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

Half Year

2020	
H1 125	H2 125
2021	
H1	H2

Full Year

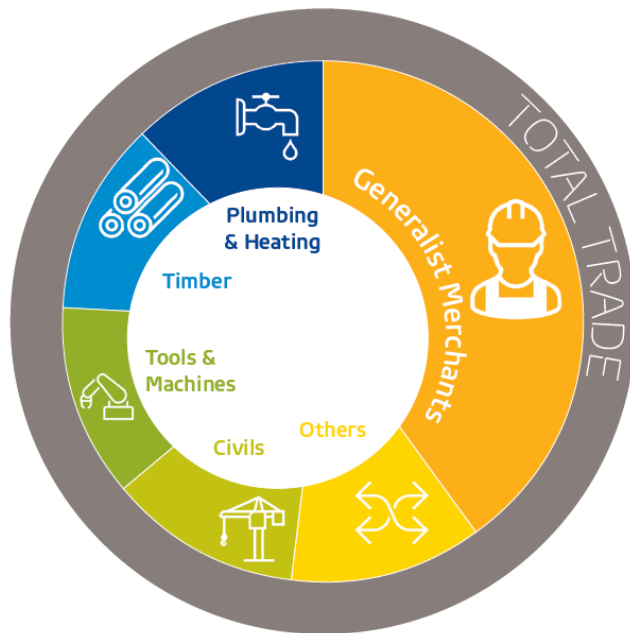
2020
250
2021

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

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

Plumbing & Heating channel definition and merchants

Plumbing & Heating Merchant Index



Plumbing Specialists

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

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

Plumbing Merchants

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

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

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

Merchant partners include:



Plumbing Trade Supplies



Contacting PHMI

PHMI Experts

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



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Commercial Manager

tom@mra-marketing.com

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Ralph Sutcliffe

Business Development
Director

ralph@mra-marketing.com

+44 (0) 1453 521621

More data available

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

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



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Senior Client Insight Manager -
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BMF Forecast Report

BMF Forecast Report

Spring 2021 edition



Builders Merchants Industry Forecast Report

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

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

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

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

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

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



**Builders Merchants
Industry Forecast**
2021

Year in Review
Spring Edition
£250

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

Contact us

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