

“building **excellence**  
in materials supply”

Including  
**Plumbing & Heating  
Merchant Index**  
See page 56

# Builders Merchant Building Index



## Monthly report for October 2021

(Published 16 December 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 (Builders Merchant Federation), to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: West Fraser (formerly known as Norbord), Pavestone UK Ltd, eCommonSense, British Gypsum, Wienerberger, Midland Lead, Polypipe, The Crystal Group, Keylite Roof Windows, Hanson Cement, Keystone Lintels, Knauf Insulation, Dulux Trade, Lakes and Bostik UK. Meet the Experts [here](#) and on pages 9 and 10 of this report.

## Recognition for BMBI

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

## More data available

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

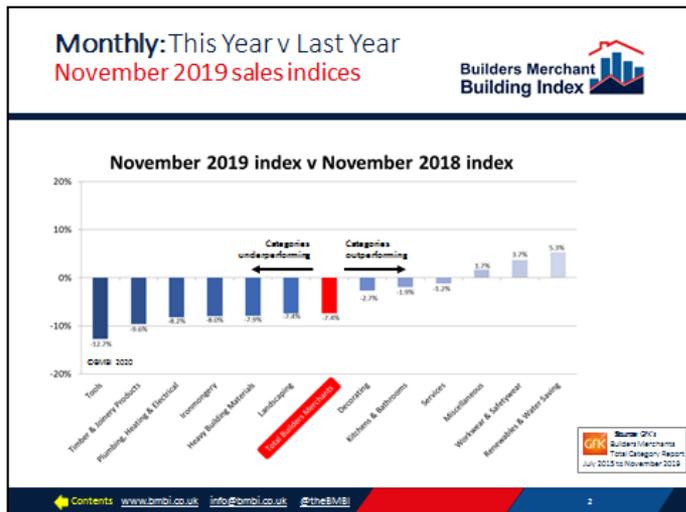
GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in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

# Trading day differences explained

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

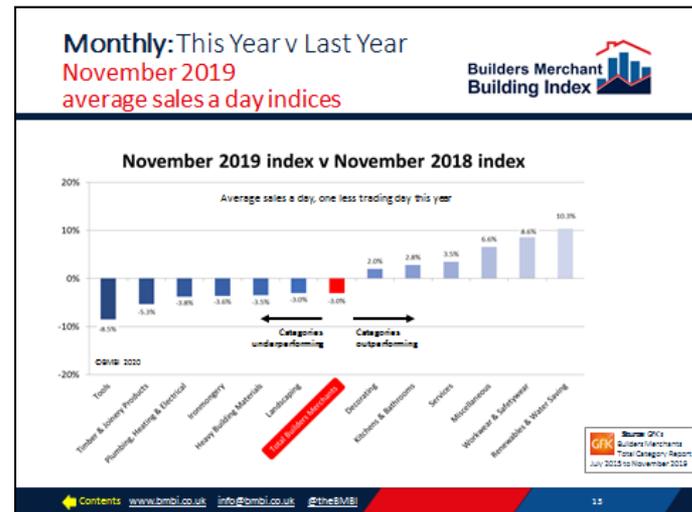
So, it's useful to also show average sales a day so we can compare apples with apples. Where trading days are different, we include two charts for the particular period under review:

## Direct comparison of sales indices:



The first of the two charts directly compares revenue in the two periods, regardless of the number of trading days. 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, while 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 and show like-for-like comparisons.

## Most categories sold more in October, led by significant value growth in Timber & Joinery

Total Builders Merchants October 2021 value sales were up 11.1% compared with the same month last year, with one less trading day this year. The spectacular year-on-year gains seen in the spring and summer have eased in recent months, reflecting the gradual return of confidence last year following the industry-wide shutdown at the start of Lockdown 1. Eight of the twelve categories sold more in October this year. Timber & Joinery Products (+28.3%) did best. Other categories grew more slowly, including Landscaping (+9.5%), Heavy Building Materials (+6.5%) and Kitchens & Bathrooms (+4.7%). Of the four categories that sold less, Workwear & Safetywear (-7.8%) was weakest. Overall like-for-like sales, which take trading day differences into account, were 16.4% higher than in October 2020.

### October 2021 v October 2019

Total sales in October 2021 were 11.3% higher than in October 2019, with two less trading days this year. Only four categories sold more, with overall growth driven by the strength of two of them: Timber & Joinery Products (+34.7%) and Landscaping (+27.6%). Only Heavy Building Materials (+5.8%) and Services (+1.8%) also exceeded 2019. Eight of the twelve categories sold less, including, Kitchens & Bathrooms (-2.1%), Decorating (-6.6%) Plumbing Heating & Electrical (-6.9%) and Tools (-7.3%). Workwear & Safetywear (-14.6%) was again weakest. Total like-for-like sales were 21.9% higher compared with October 2019.

### Month-on-Month

Total Merchants sales were 5.1% lower in October than in September, with one less trading day in October. Three categories sold more: Workwear & Safetywear (+8.4%), Plumbing Heating & Electrical (+3.4%) and Renewables & Water Saving (+0.9%). Categories selling less included Decorating (-1.2%), Heavy Building Materials (-4.0%) and Timber & Joinery Products (-6.3%). Seasonal category Landscaping (-13.6%) was weakest. Total like-for-like sales were down 0.5%.

### Last 3 months, year on year

Total sales in the three months August to October 2021 were up 16.1% on the same period last year. Eleven of the twelve categories sold more. Timber & Joinery Products (+38.9%) was especially strong, with other categories growing more slowly, including Heavy Building Materials (+10.4%), Landscaping and Kitchens & Bathrooms both up 9.2% and Plumbing Heating & Electrical (+9.1%). Only Landscaping (-5.1%) sold less.

### Last 3 months v 2019

Compared with two years ago, sales in the three months to October were 17.9% up on August-October 2019, with one less trading day this year. Two categories did particularly well: Timber & Joinery Products (+45.4%) and Landscaping (+32.5%). Three categories grew more slowly, including Heavy Building Materials (+10.7%) and Kitchens & Bathrooms (+4.1%). The remaining seven channels all sold slightly less, with Workwear & Safetywear (-7.3%) weakest. Total like-for-like sales were 19.7% higher.

Total Builders Merchants October 2021 value sales were up 11.1% compared with the same month last year and 11.3% higher than in October 2019. Timber & Joinery Products did best, 28.3% higher compared with last year and 34.7% ahead of 2019.

Overview continues on the next page...

# Overview - 2

...Overview continued from the previous page:

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

Total sales in August to October were 4.9% lower than in the previous three months, with two more trading days in the most recent period. Five categories sold more, led by Workwear & Safetywear (+5.7%) and Plumbing Heating & Electrical (+4.8%). Tools (+0.1%) was flat. The remaining six categories all sold less, including Timber & Joinery Products (-2.7%), Heavy Building Materials (-3.5%) and Ironmongery (-4.9%). Seasonal category Landscaping (-24.9%) was weakest. Overall like-for-like sales were 7.9% lower than in May to July.

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

Total Merchants value sales in January to October 2021 were up 33.1% compared with Covid-affected January to October 2020 and all categories sold more. There were three less trading days this year. Timber & Joinery Products (+57.2%) was the top-performer, followed by Landscaping (+33.3%). Other categories grew more slowly than merchants overall, with Tools (+30.9%) and Kitchens & Bathrooms (+26.5%). Plumbing Heating & Electrical and Heavy Building Materials were both up 26.0%. Only Workwear & Safetywear (+1.8%) failed to achieve double-digit growth. Like-for-like value sales were 35.0% higher.

## **Year to date v 2019**

Total sales in the nine months to October 2021 were up 14.7% on January to October 2019, with three less trading days this year. Seven of the twelve categories sold more. Landscaping (+37.0%) did best, closely followed by Timber & Joinery Products (+35.6%). Other categories grew more slowly, including Heavy Building Materials (+7.7%) and ironmongery (+1.2%). Of the five categories selling less, Decorating (-2.5%) was weakest. Total like-for-like sales were 16.4% higher this year.

## **MAT**

Total Merchants sales in November 2020 to October 2021 were 29.4% higher than in the same 12 months a year earlier, with one less trading day this year. All categories sold more. The year's standout category Timber & Joinery Products (+51.2%) continued to perform strongly. Landscaping (+32.7%), Tools (+25.7%) and Heavy Building Materials (+23.2%) were next-strongest. Workwear & Safetywear (+1.3%) had the lowest growth but this was compared to a strong performance in the first Covid-affected months of 2020. Like-for-like sales increased by 29.9%.

## **Index**

October's overall BMBI index was 140.4, helped by Timber & Joinery Products (181.0). Almost all categories recorded indices exceeding 100, including Landscaping (148.5), Plumbing Heating & Electrical (131.0) and Heavy Building Materials (130.8). Only Renewables (71.5) fell below 100.

Total Merchants value sales January to October 2021 were up 33.1% compared with Covid-affected January to October 2020 and up 14.7% on January to October 2019. Timber & Joinery Products (+57.2%) was strongest year-on-year and Landscaping (+37.0%) did best compared with 2019.

# The Expert Panel

## Speaking for their markets - 1

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

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

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

### Expert for Drylining Systems:



**Stacey Temprell,**  
Marketing Director  
British Gypsum

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

### Expert for Bricks & Roof Tiles:



**Kevin Tolson,**  
Commercial Director  
Wienerberger UK

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

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

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

### Expert for Civils & Green Infrastructure:



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

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

### Expert for Lead:



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

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

### Expert for Wood-Based Panels:



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

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

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

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

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



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

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

### Expert for Shower Enclosures and Showering:



**Mick Evans**  
Operations Director  
Lakes

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

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

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

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

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

### Expert for Paint:



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

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

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



**Andy Scothern**  
Managing Director  
eCommonSense

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

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

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

### Expert for Adhesives & Sealants:



**Mathew Whitehouse**  
Marketing Director  
Bostik UK

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

# Monthly: Index and Categories

October 2020\* – October 2021

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



		2020			2021									
MONTHLY SALES VALUE INDEX	Index	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
<b>Total Builders Merchants</b>	<b>100</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>	<b>139.3</b>	<b>147.9</b>	<b>140.4</b>
Timber & Joinery Products	100	141.1	139.9	95.2	120.0	128.8	175.7	176.3	173.2	199.6	199.8	182.6	193.3	181.0
Heavy Building Materials	100	122.8	119.4	78.1	95.9	102.0	141.3	137.4	128.6	142.8	136.8	127.0	136.2	130.8
Decorating	100	111.7	110.5	76.2	85.8	95.7	121.7	113.2	106.5	116.7	115.0	108.7	114.8	113.5
Tools	100	101.0	100.0	70.9	84.4	93.7	120.8	110.7	98.2	100.2	97.6	93.6	101.8	100.9
Workwear & Safetywear	100	125.2	126.7	87.9	122.3	111.3	118.2	104.0	95.8	111.8	92.8	95.7	106.5	115.4
Ironmongery	100	127.3	122.9	87.8	103.1	111.5	143.1	137.4	127.0	137.0	129.2	120.2	129.2	124.6
Landscaping	100	135.6	122.8	78.0	90.1	111.9	222.5	257.0	220.5	235.1	204.8	175.3	171.9	148.5
Plumbing, Heating & Electrical	100	126.0	125.9	96.1	111.3	120.3	137.1	119.2	112.9	123.7	113.7	109.7	126.7	131.0
Renewables & Water Saving	100	67.2	70.3	50.4	62.6	62.3	85.9	78.8	72.7	80.1	72.1	70.6	70.9	71.5
Kitchens & Bathrooms	100	119.3	122.7	87.4	94.4	107.4	120.7	113.5	111.5	125.1	126.5	118.3	131.2	124.9
Miscellaneous	100	120.8	118.9	86.1	109.4	107.1	131.2	126.2	111.2	120.3	121.6	116.2	128.4	120.4
Services	100	117.5	115.4	89.0	93.5	103.3	134.5	128.8	123.5	131.4	132.8	130.2	133.4	127.7

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

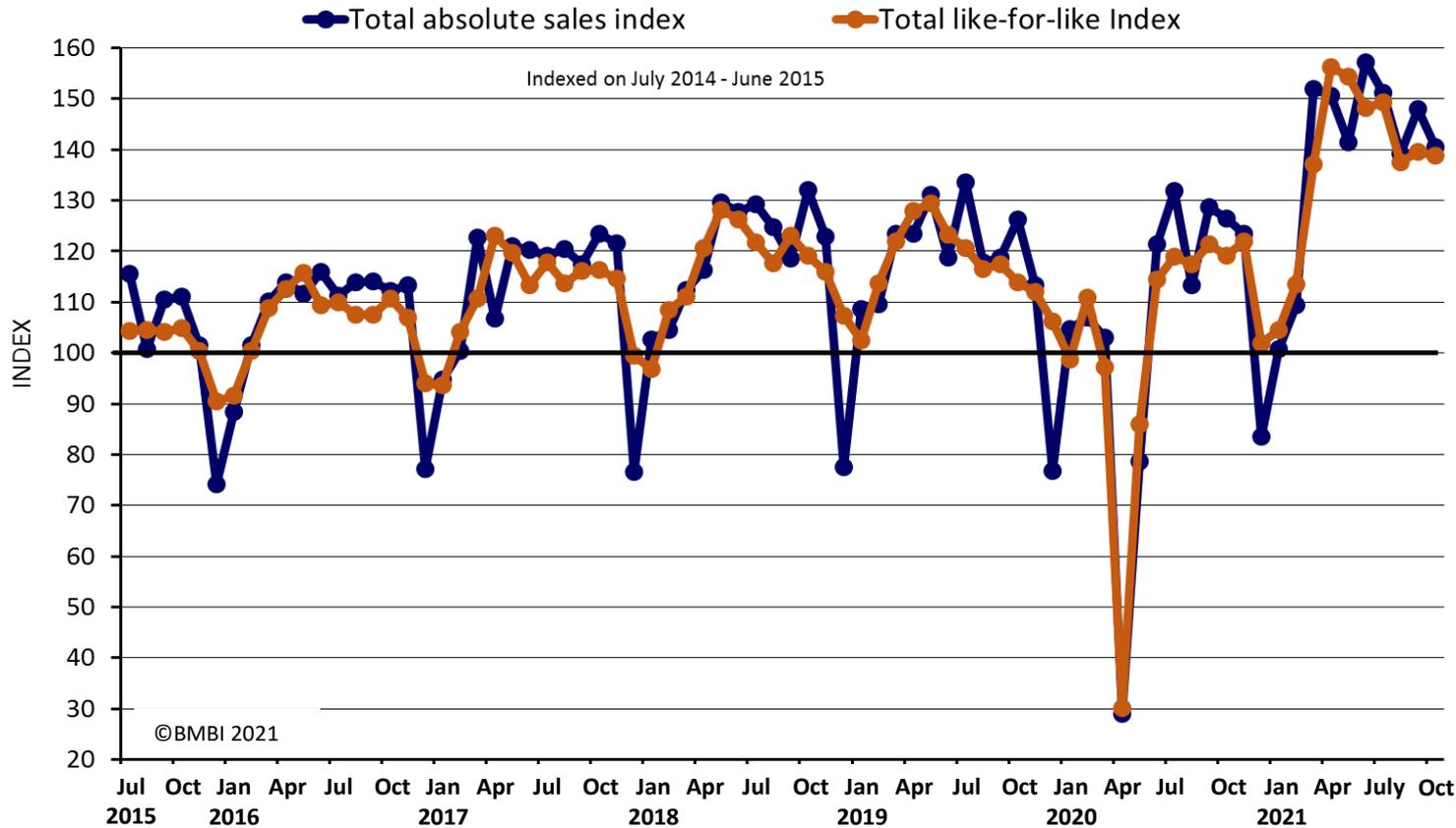
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: Index

## Absolute and like-for-like sales

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

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



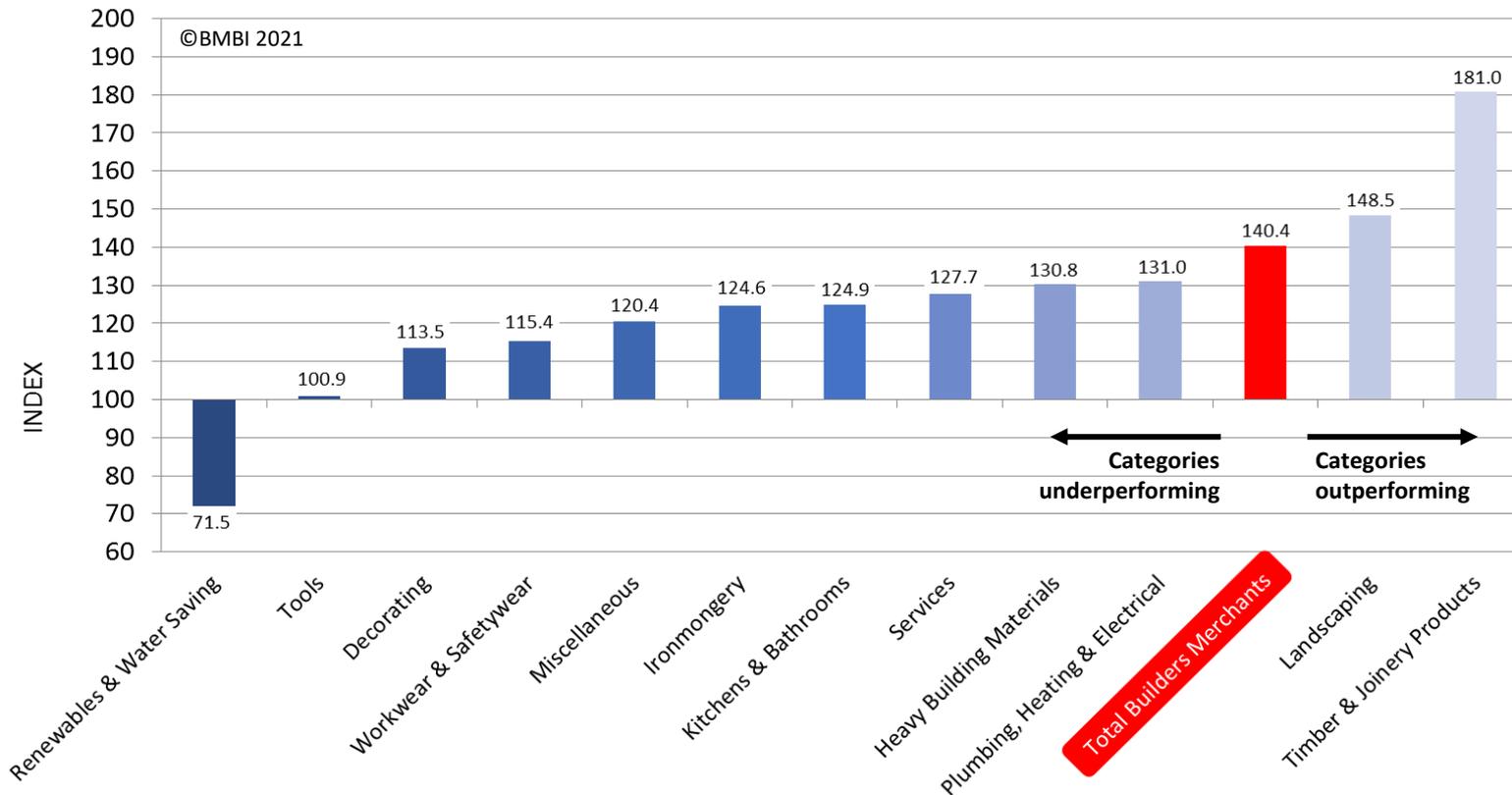
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: Index and Categories

October 2021 index



## October 2021 Index



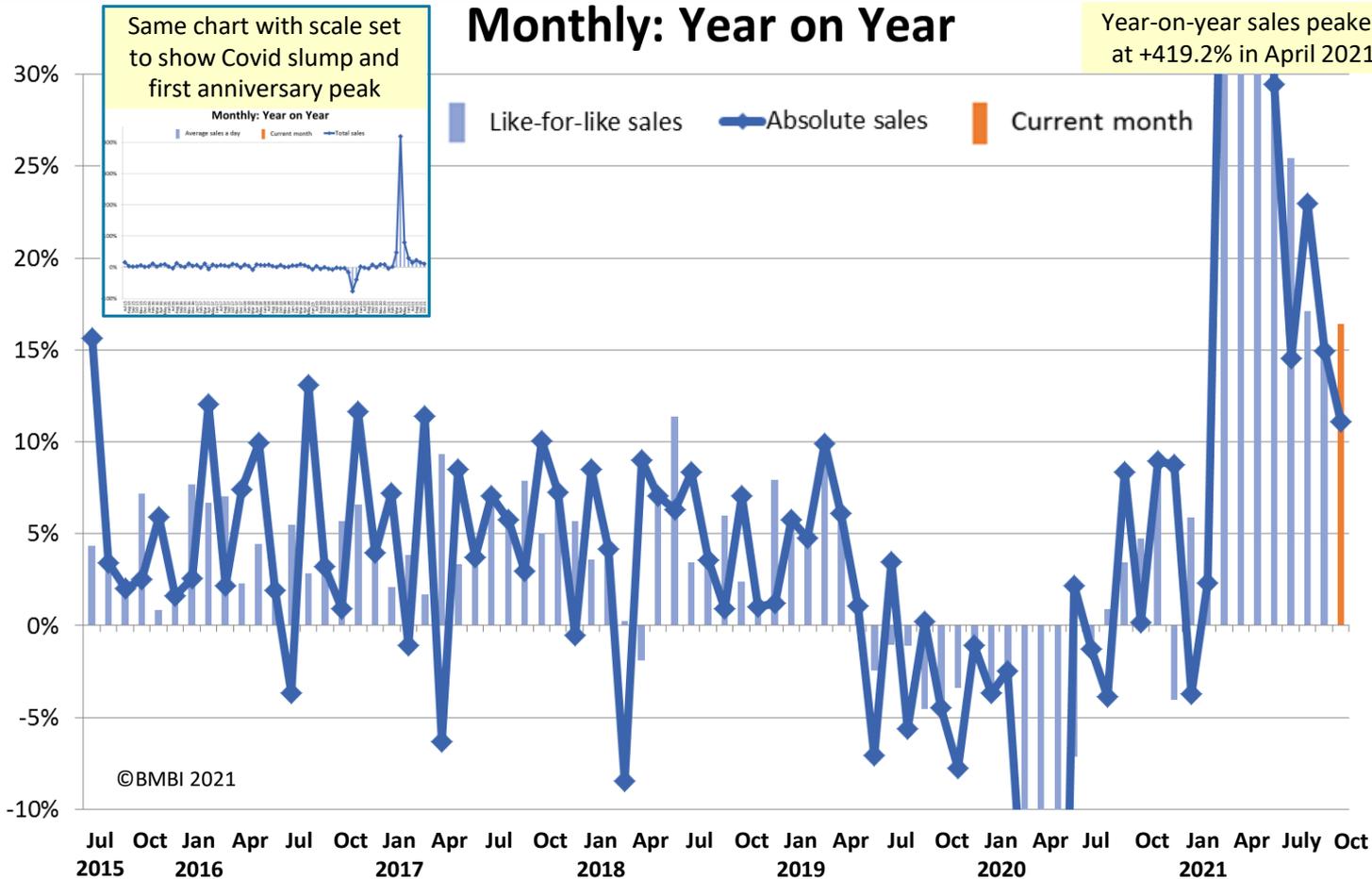
**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: Sales Indices Year on Year

Absolute and like-for-like sales



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



Year-on-year sales peaked at +419.2% in April 2021

Year-on-year sales slumped to -73.6% in April 2020

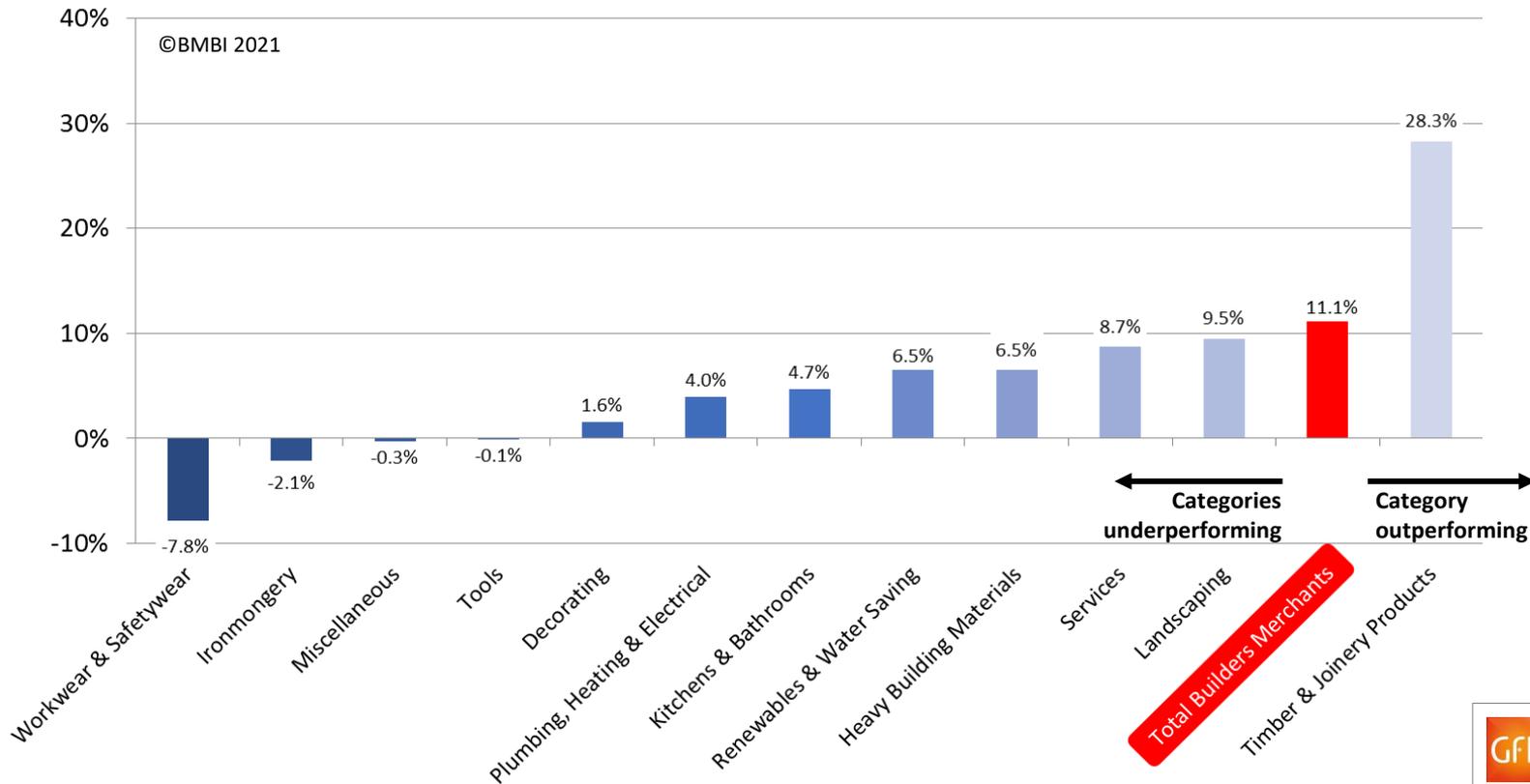
Source: GfK's Builders Merchants Total Category Report July 2015 to October 2021

# Monthly: This Year v Last Year

October 2021 sales indices



## October 2021 index v October 2020 index



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

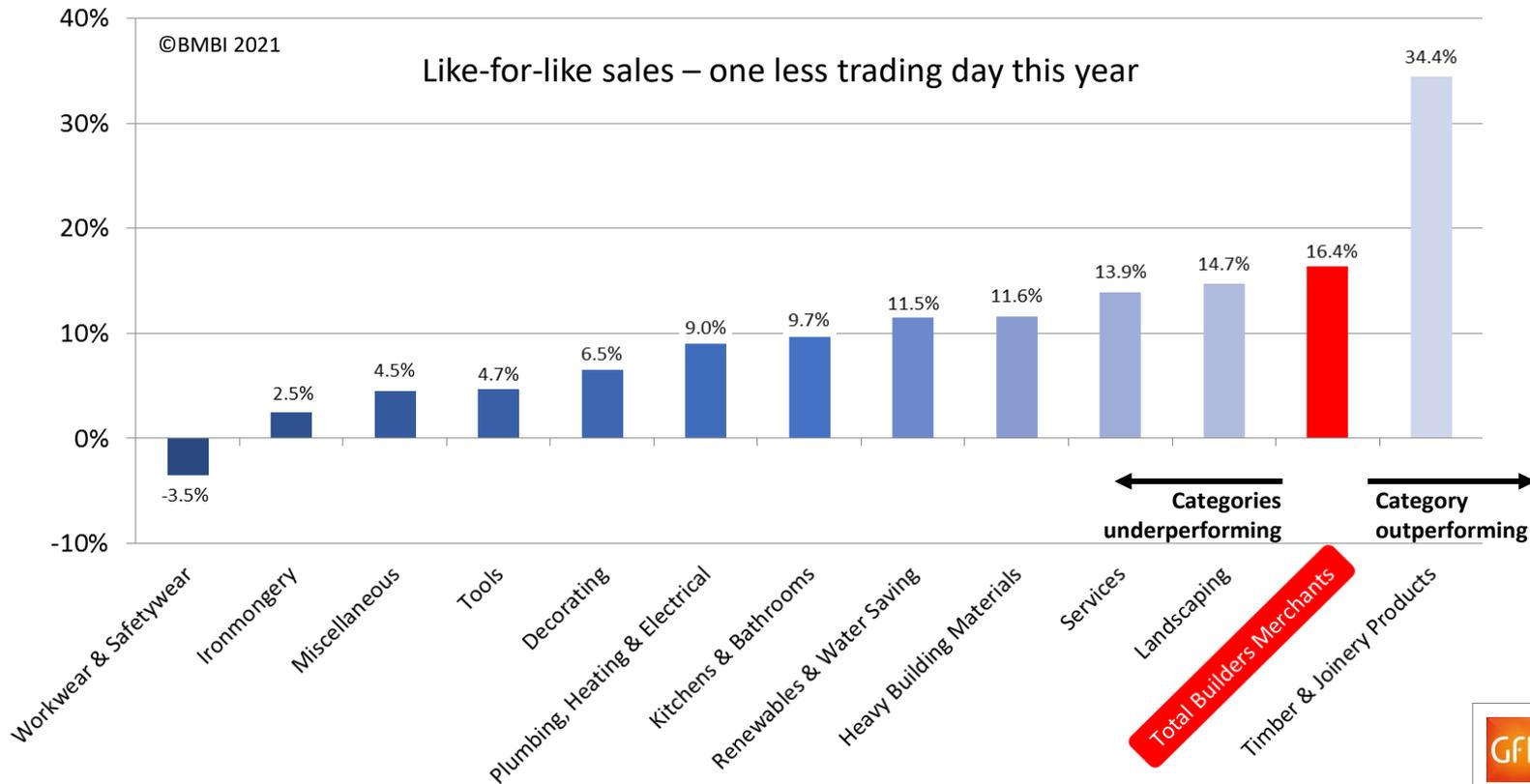
# Monthly: This Year v Last Year

## October 2021 like-for-like sales indices



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

### October 2021 index v October 2020 index



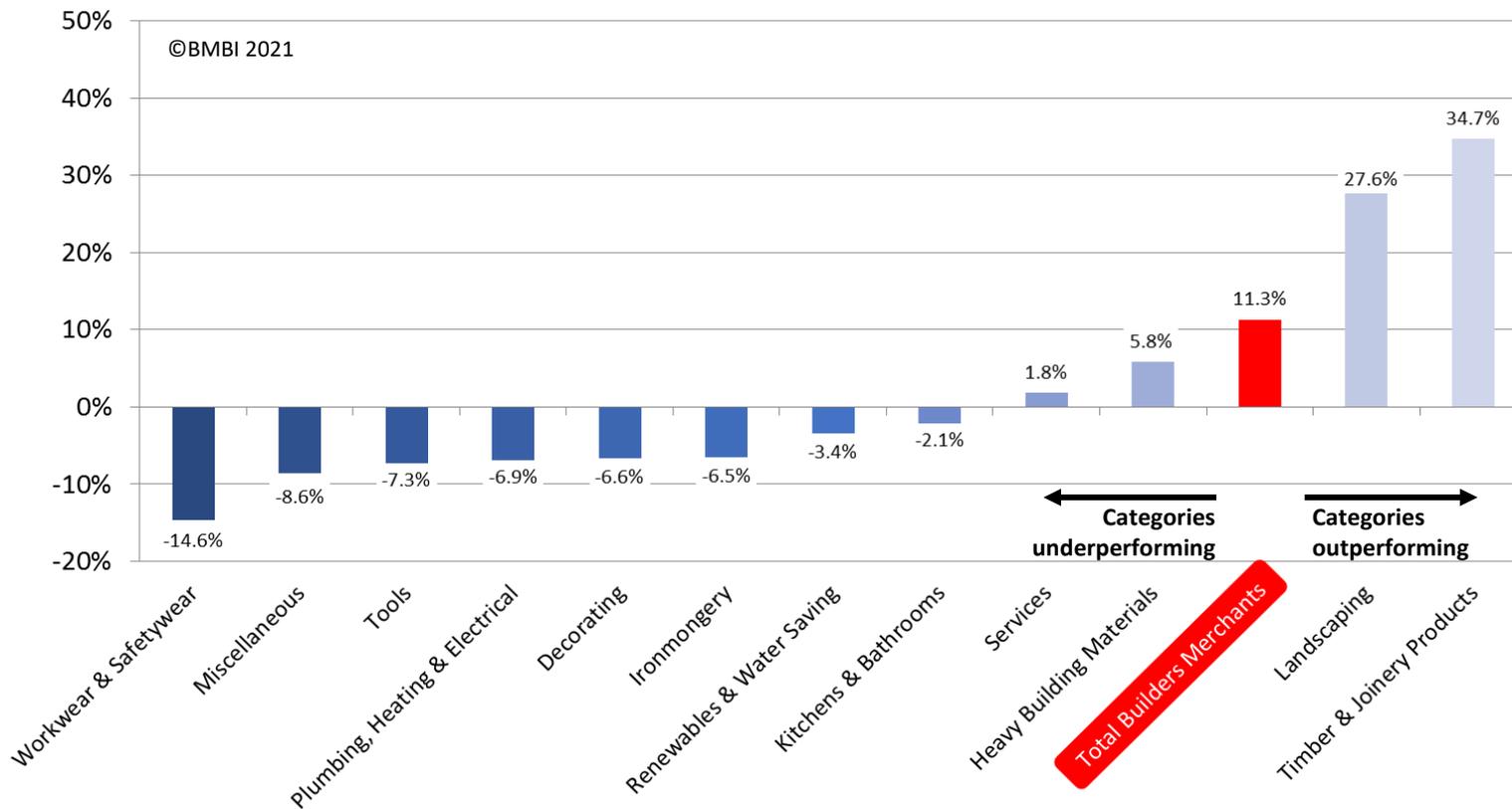
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: This year v 2019

October 2021 2-year sales indices



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



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

# Monthly: This year v 2019

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

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

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

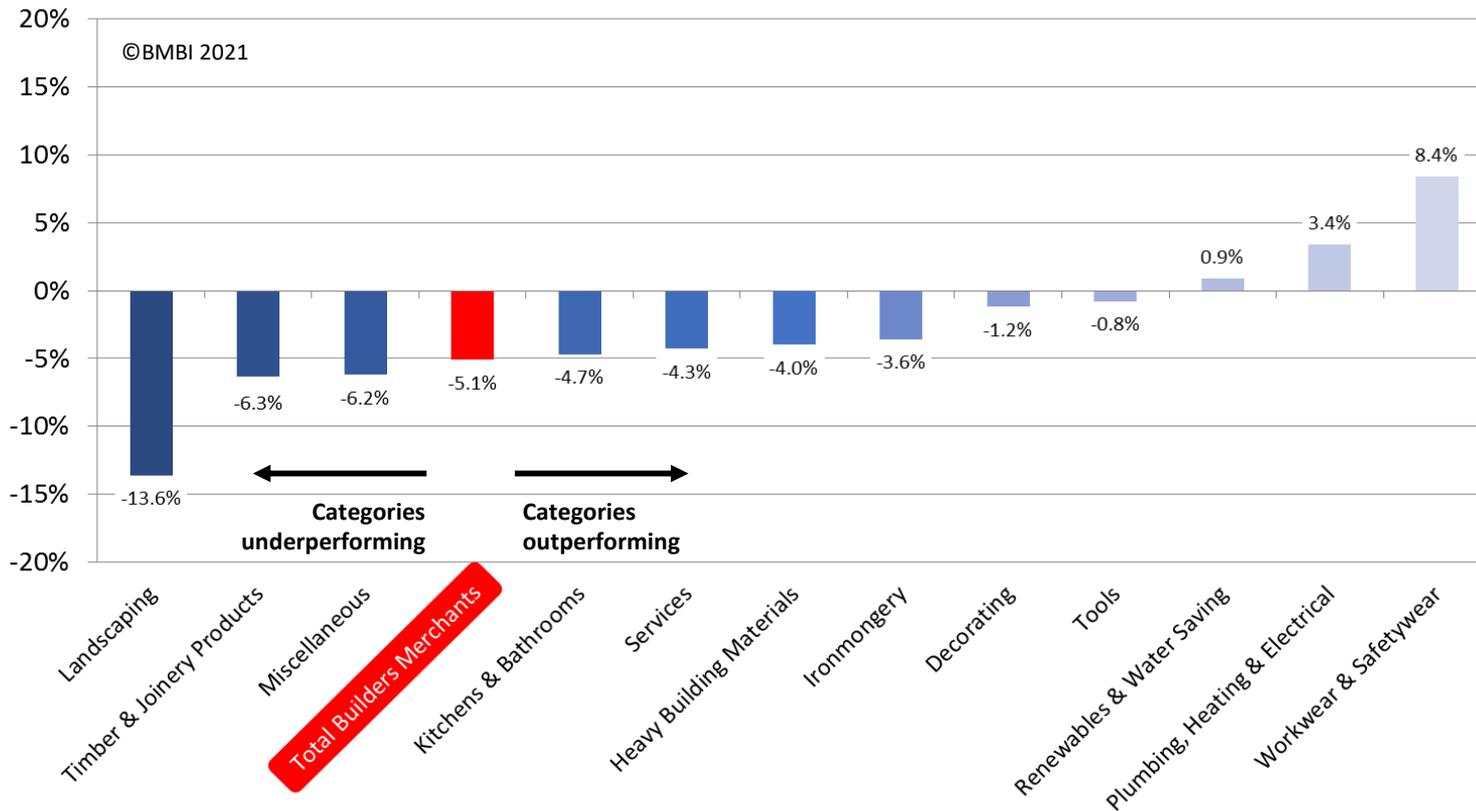


**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: This Month v Last Month

October 2021 sales indices

## October 2021 Index v September 2021 Index



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

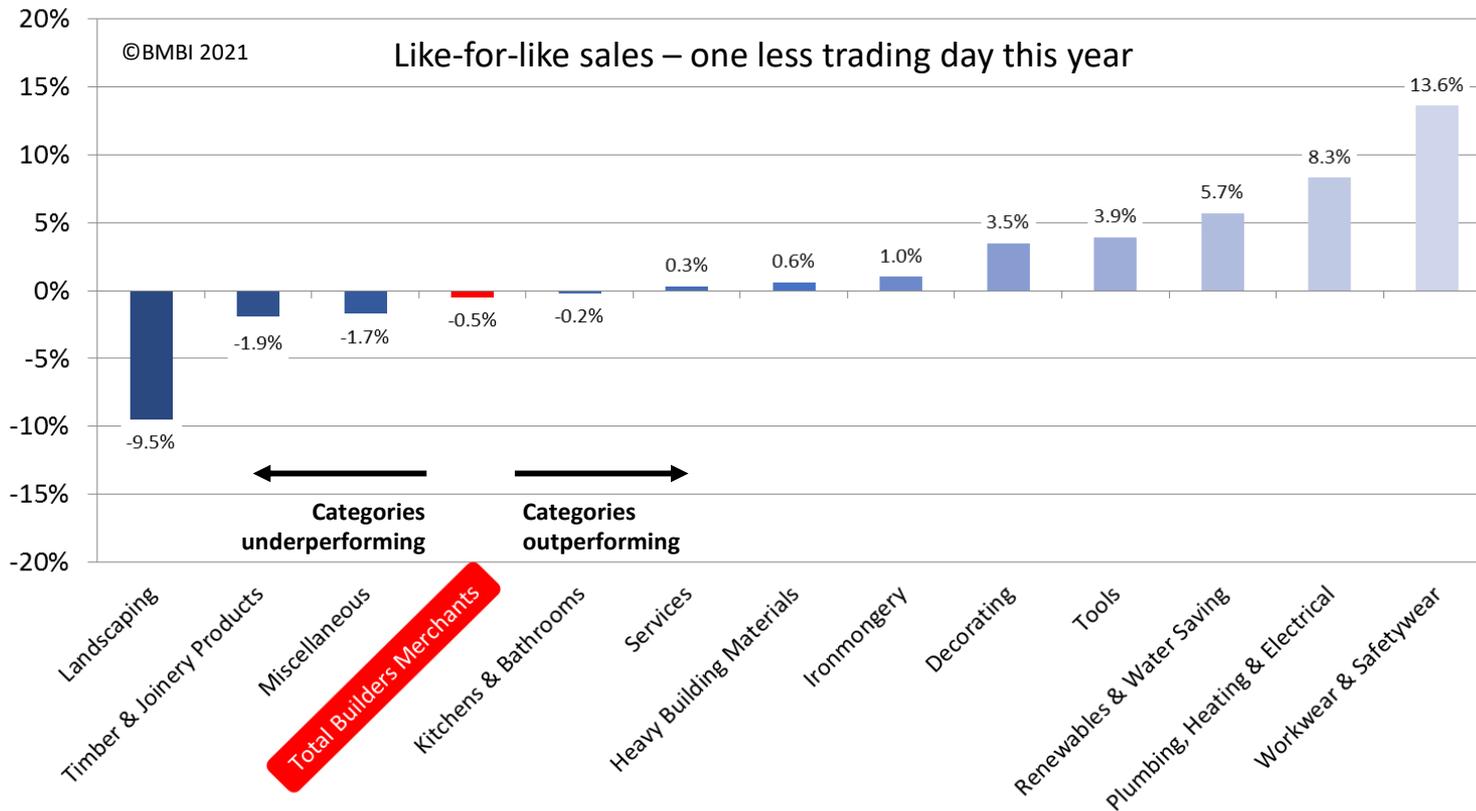
# Monthly: This Month v Last Month

October 2021 like-for-like sales indices



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

## October 2021 Index v September 2021 Index



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

# Quarterly: Index and Categories

Quarter 3 2019\* to Quarter 3 2021

(Indexed on July 2014 to June 2015)



QUARTERLY SALES VALUE INDEX	Index	Q3 2019	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
<b>Total Builders Merchants</b>	<b>100</b>	<b>123.4</b>	<b>105.4</b>	<b>104.9</b>	<b>76.4</b>	<b>124.6</b>	<b>111.1</b>	<b>120.7</b>	<b>149.7</b>	<b>146.1</b>
Timber & Joinery Products	100	128.9	111.3	108.5	78.0	133.4	125.4	141.5	183.0	191.9
Heavy Building Materials	100	121.0	102.3	102.5	75.1	119.9	106.8	113.1	136.3	133.3
Decorating	100	115.7	104.7	101.1	56.3	108.5	99.5	101.1	112.2	112.9
Tools	100	98.5	92.2	86.0	41.0	94.4	90.7	99.6	103.0	97.6
Workwear & Safetywear	100	105.3	117.4	128.7	67.5	113.7	113.3	117.3	103.9	98.3
Ironmongery	100	126.1	113.6	112.9	65.0	123.2	112.6	119.3	133.8	126.2
Landscaping	100	141.3	91.2	100.1	138.8	175.5	112.1	141.5	237.5	184.0
Plumbing, Heating & Electrical	100	118.7	123.4	118.5	53.9	104.6	116.0	122.9	118.6	116.7
Renewables & Water Saving	100	75.3	65.8	76.6	31.5	66.4	62.6	70.3	77.2	71.2
Kitchens & Bathrooms	100	120.2	112.8	109.4	48.4	111.6	109.8	107.5	116.7	125.3
Miscellaneous	100	128.0	114.9	129.1	63.3	111.0	108.6	115.9	119.2	122.1
Services	100	121.8	110.3	104.8	72.8	115.9	107.3	110.4	127.9	132.1

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

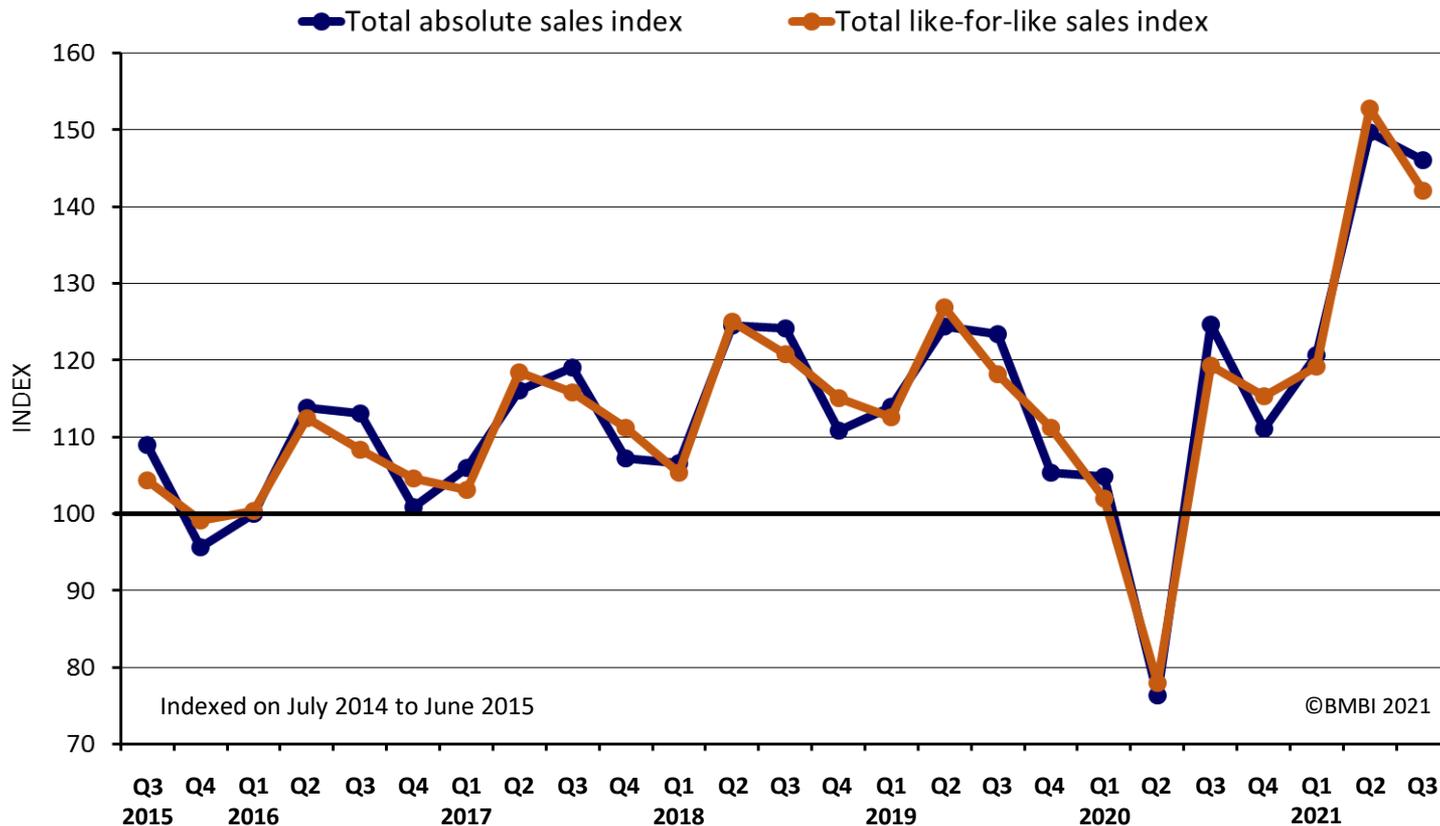
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: Index

Absolute and like-for-like sales

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

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



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

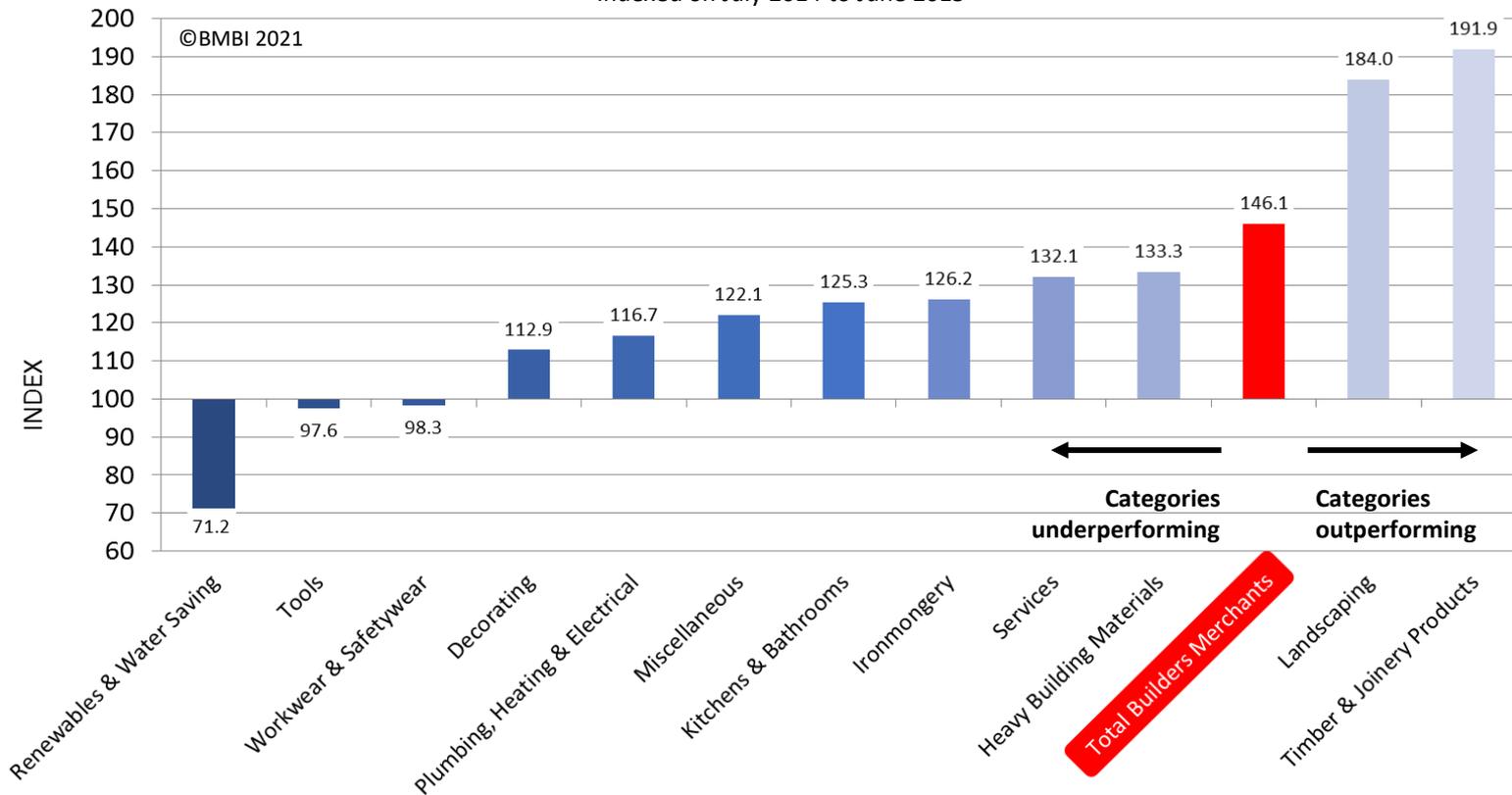
# Quarterly: Index and Categories

Q3 2021 index



## Quarter 3 2021

Indexed on July 2014 to June 2015



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

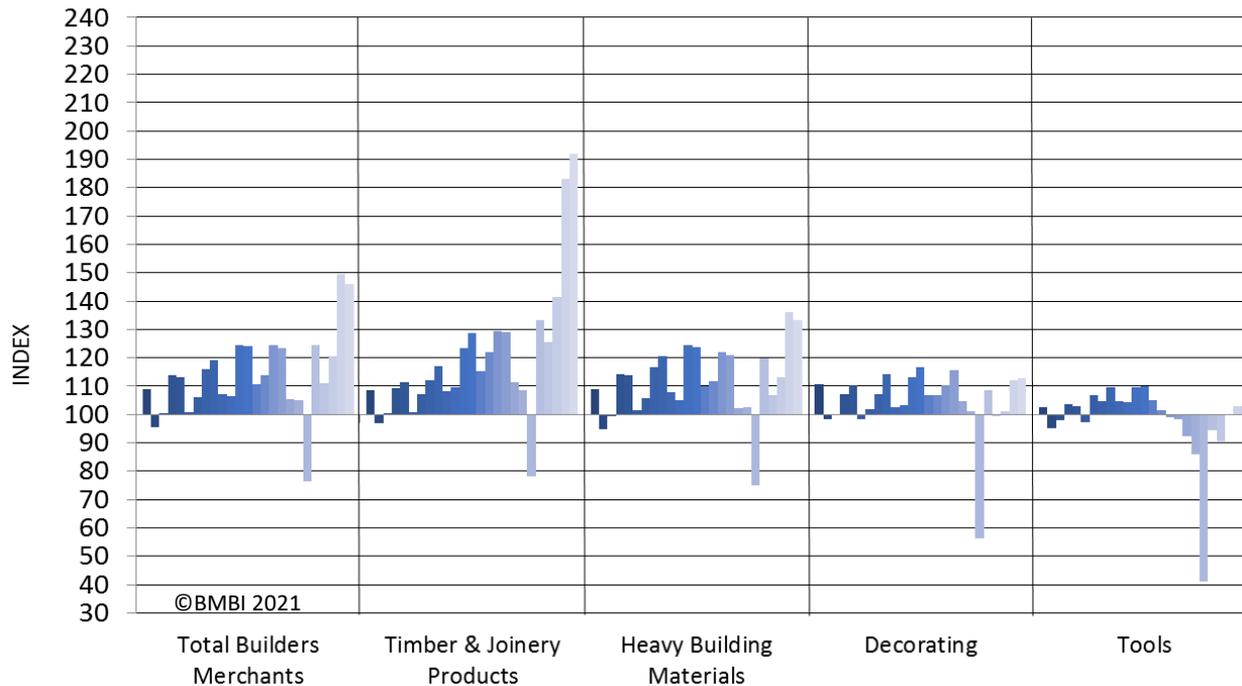
# Quarterly: Index and Categories - 1

Quarterly indices



## Quarterly Indices Q3 2015 to Q3 2021

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



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

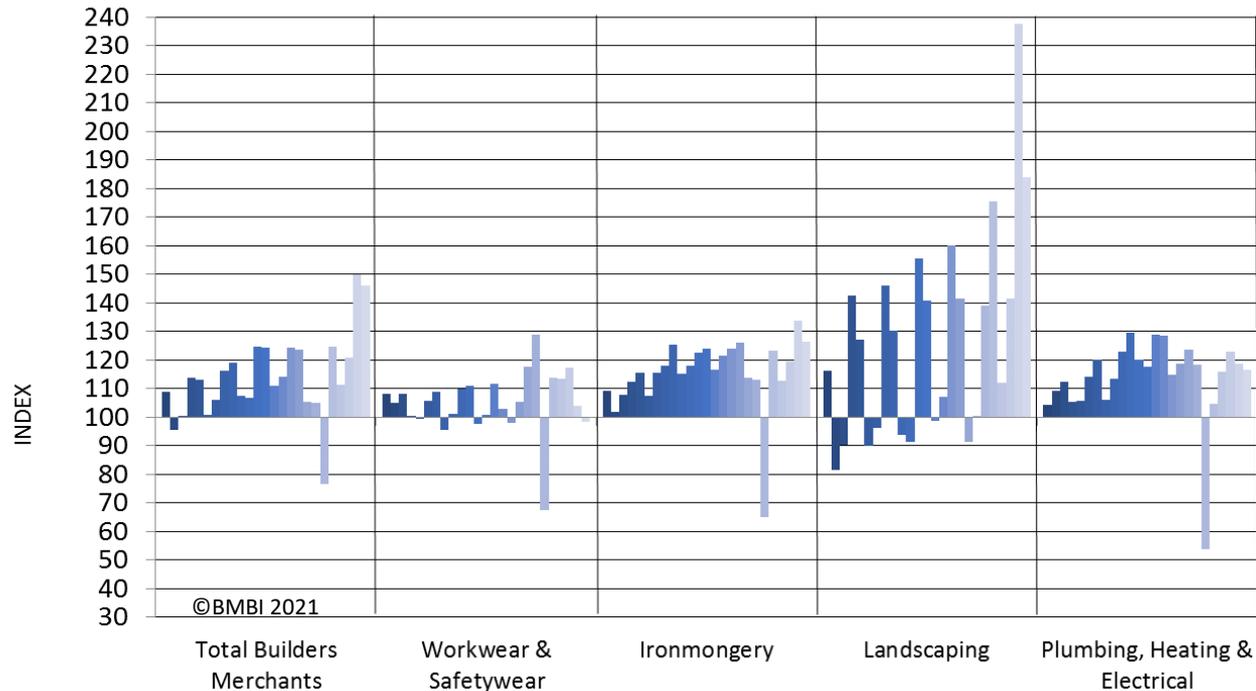
# Quarterly: Index and Categories - 2

Quarterly indices



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

## Quarterly Indices Q3 2015 to Q3 2021



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

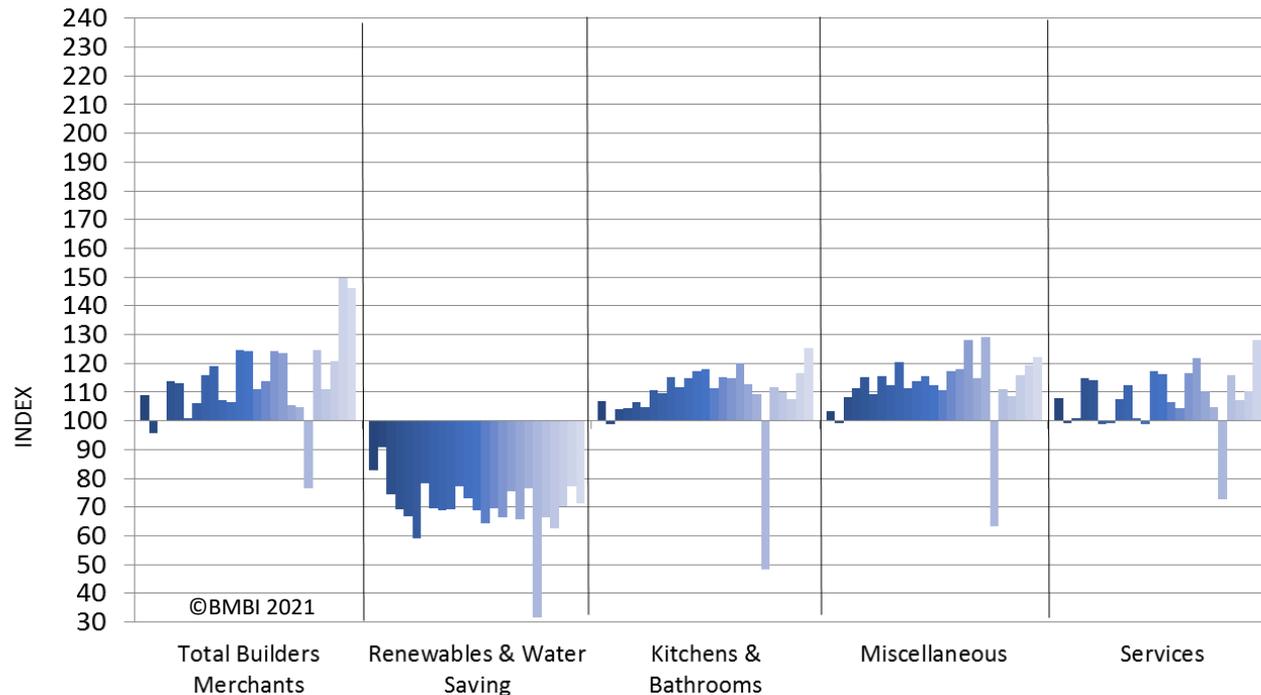
# Quarterly: Index and Categories - 3

Quarterly indices



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

## Quarterly Indices Q3 2015 to Q3 2021

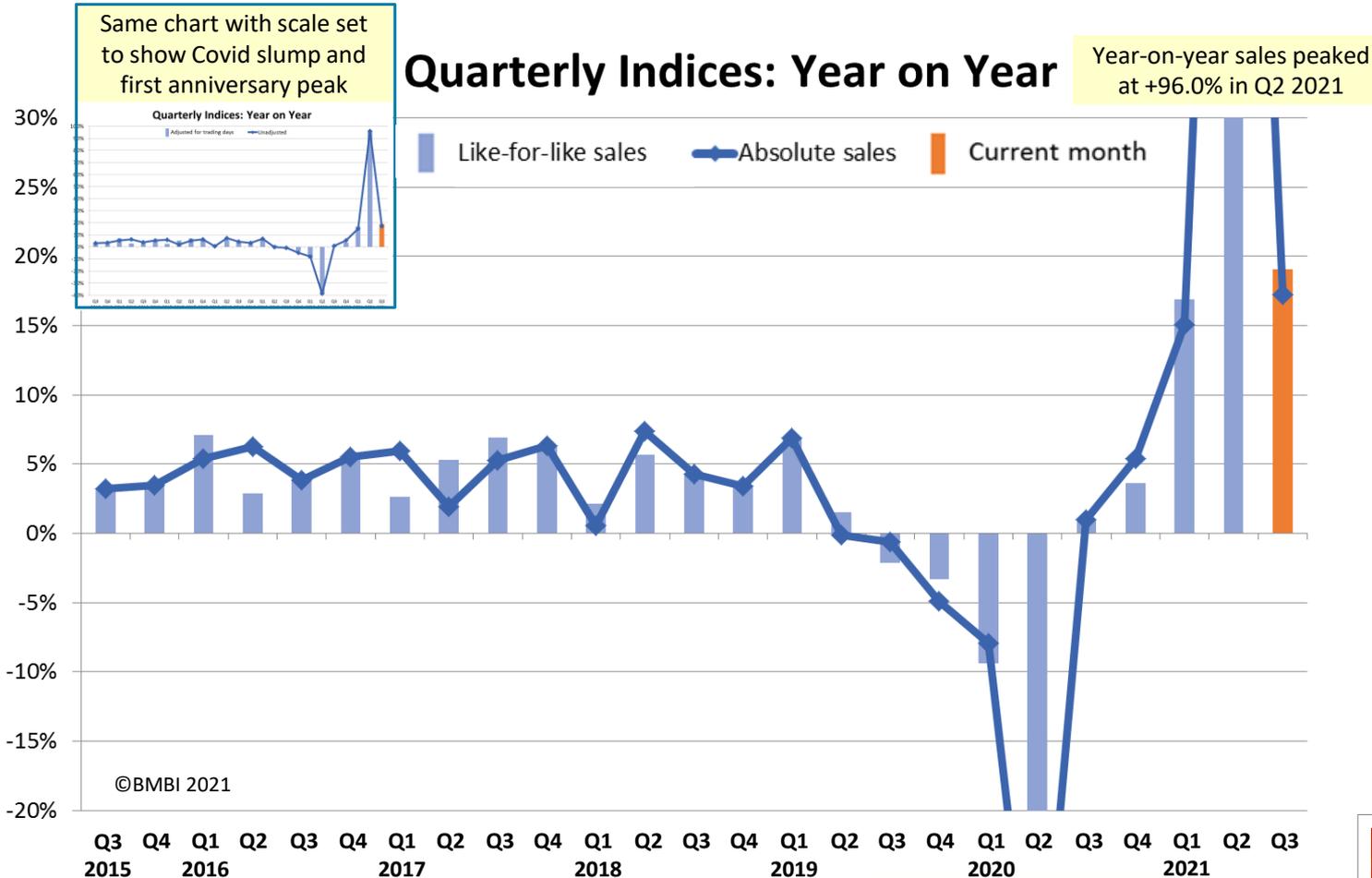


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: Sales Indices

Absolute and like-for-like sales

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



Year-on-year sales slumped to -38.6% in Q2 2020

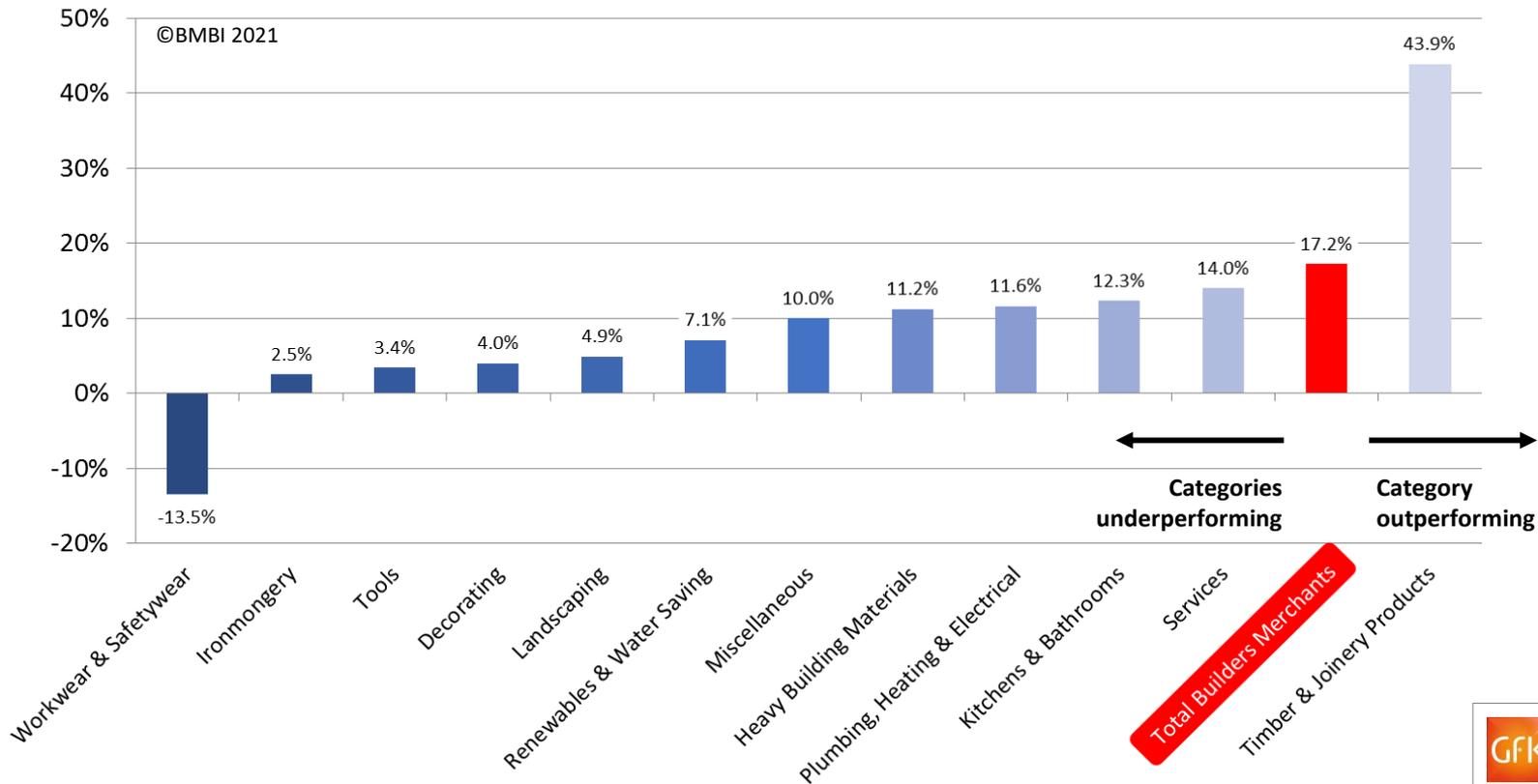
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

# Quarterly: This Year v Last Year

Q3 2021 sales indices



## Quarter 3 2021 index v Quarter 3 2020 index



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

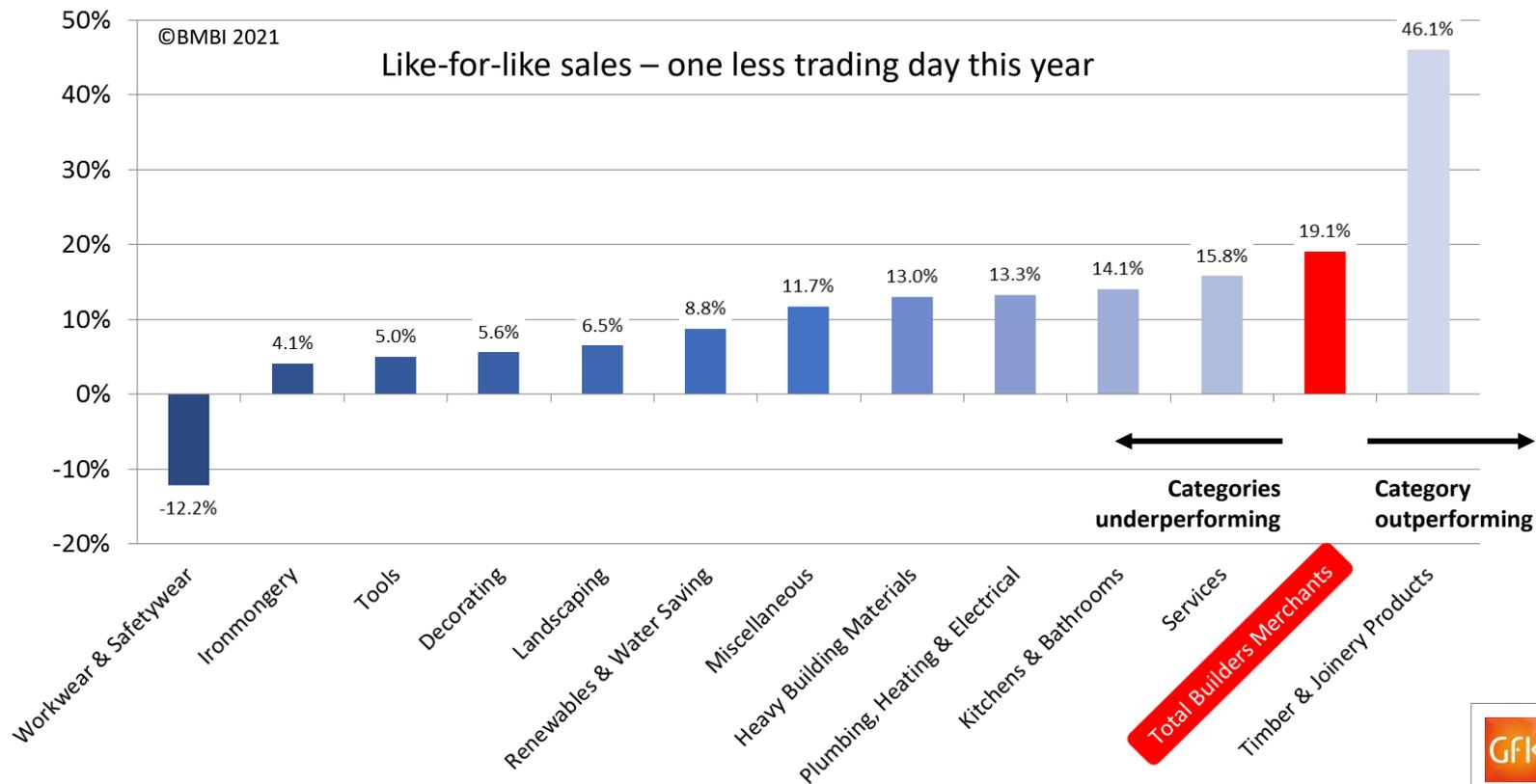
# Quarterly: This Year v Last Year

Q3 2021 like-for-like sales indices



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

## Quarter 3 2021 index v Quarter 3 2020 index

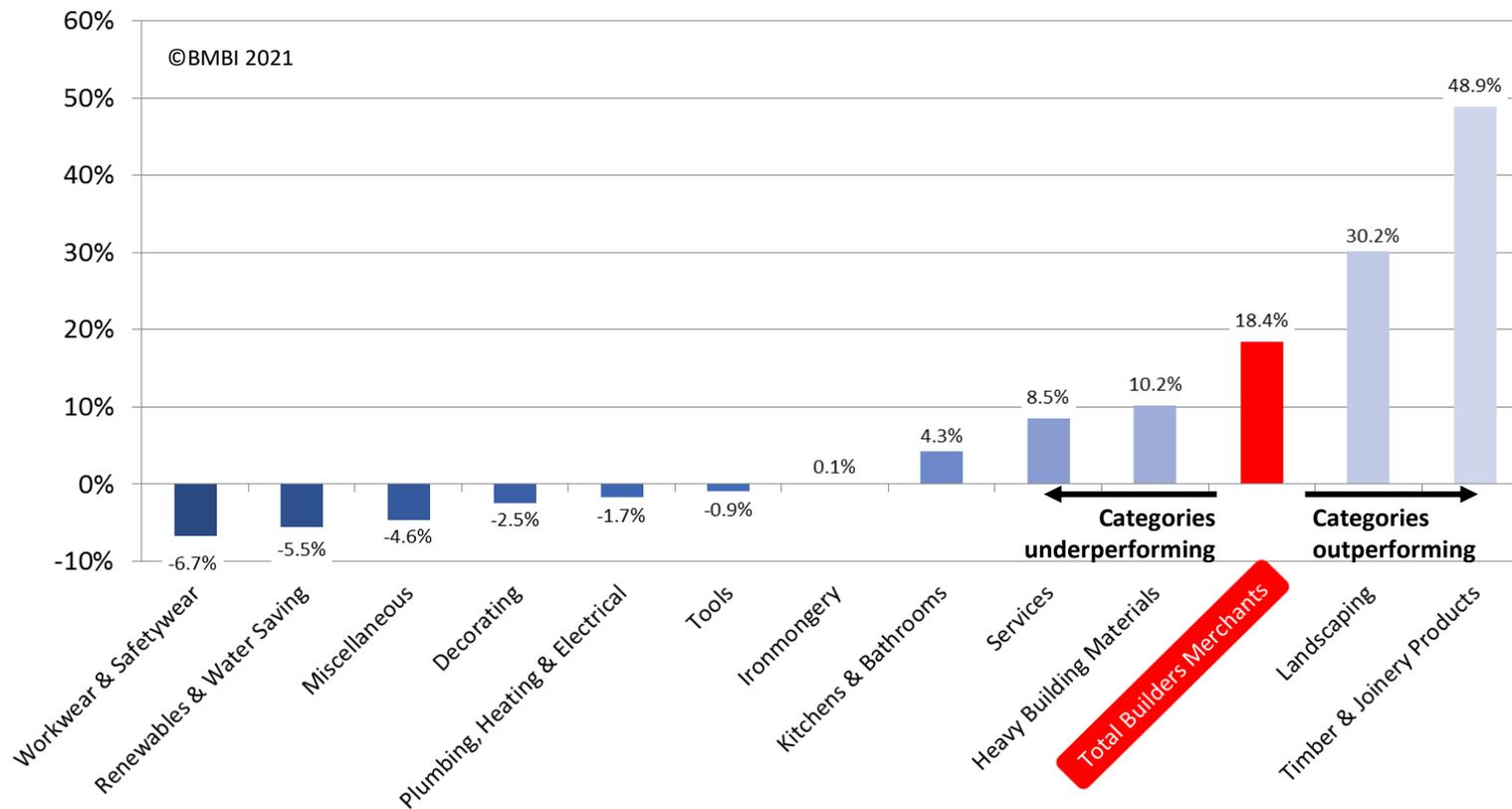


**GfK** Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: This Year v 2019

Q3 2021 2-year sales indices

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



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

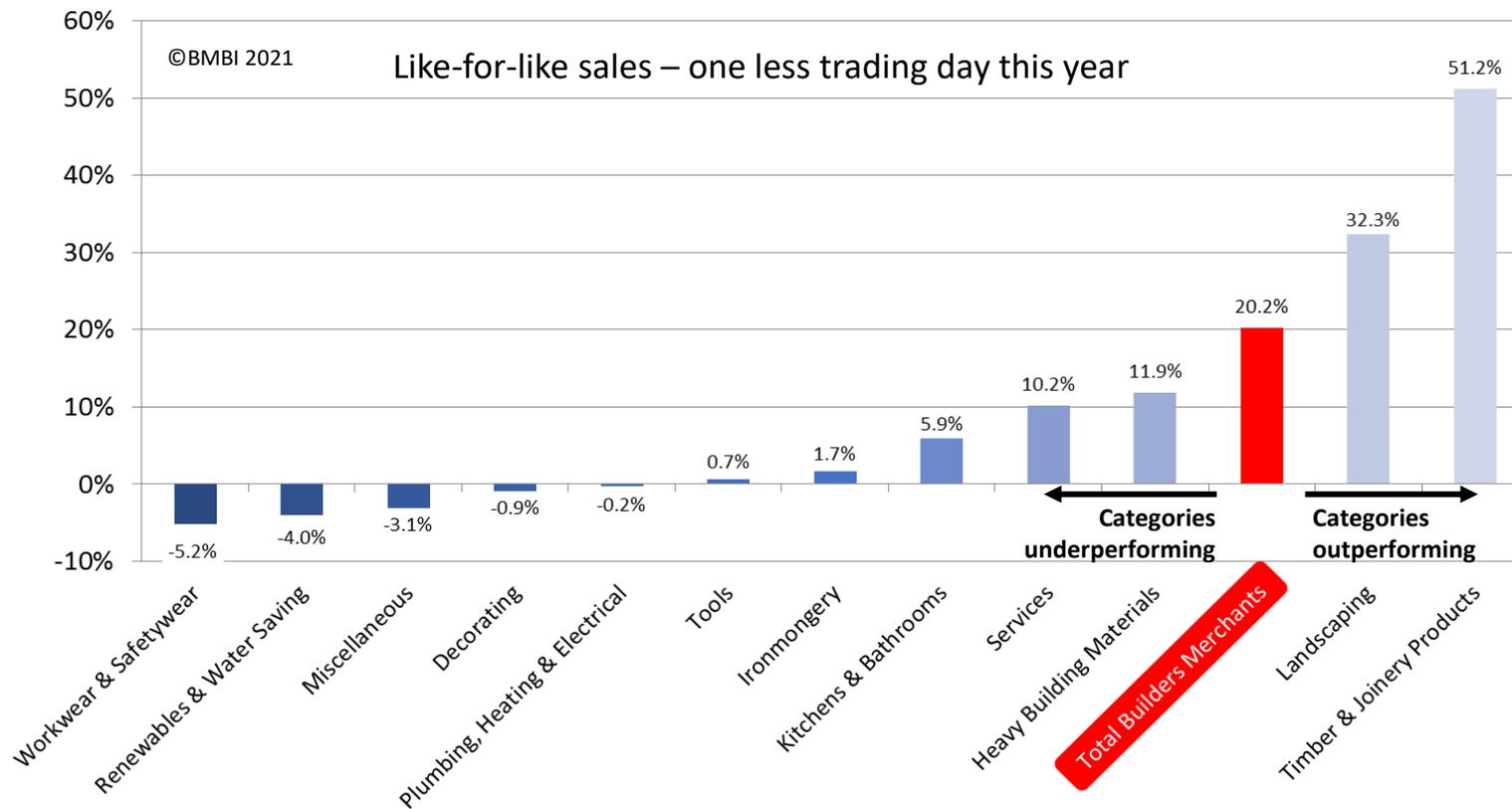
# Quarterly: This Year v 2019

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



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

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



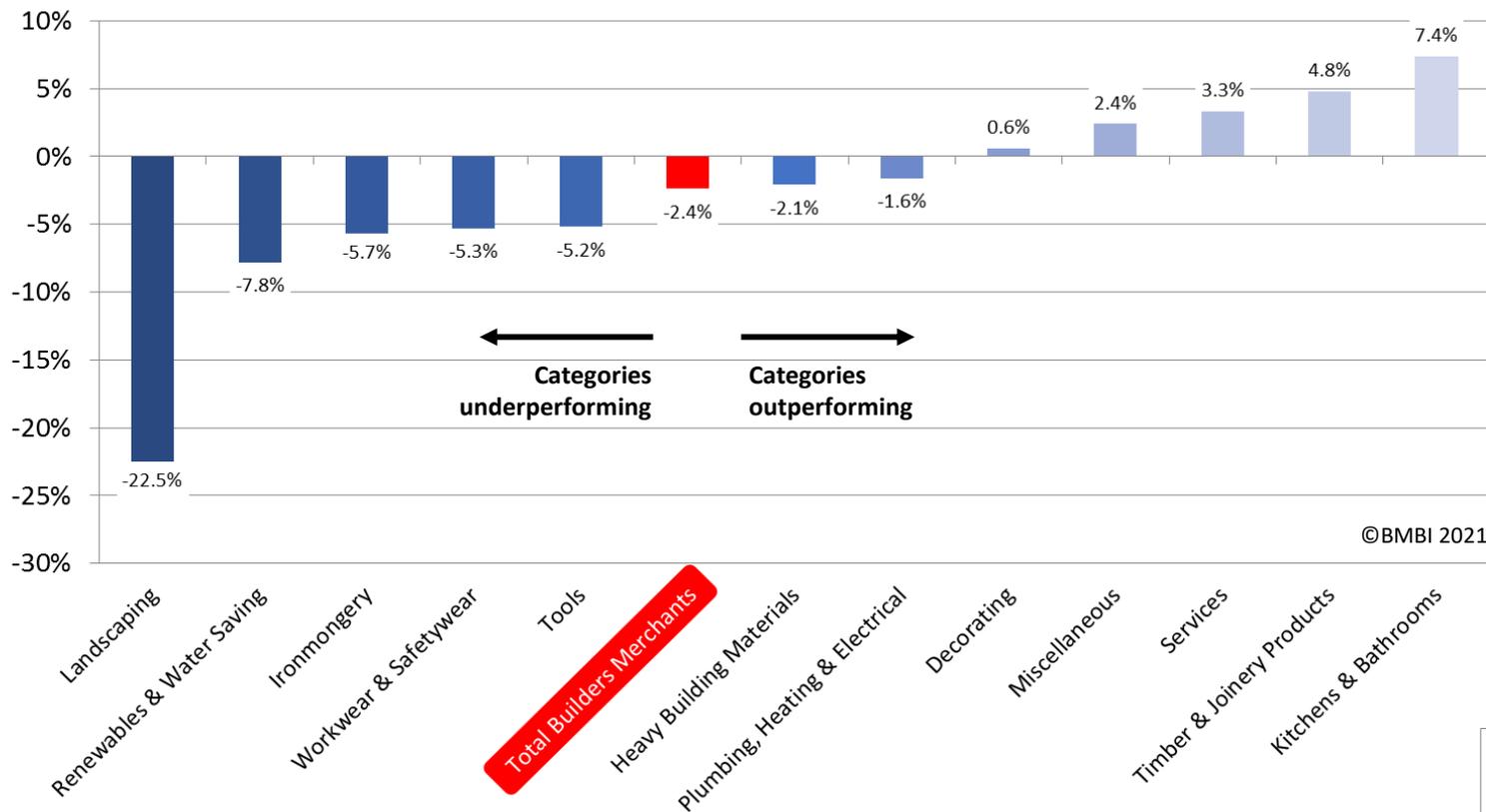
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to September 2021

# Quarterly: Quarter on Quarter

Q3 2021 sales indices



## Quarter 3 2021 index v Quarter 2 2021 index



©BMBI 2021

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

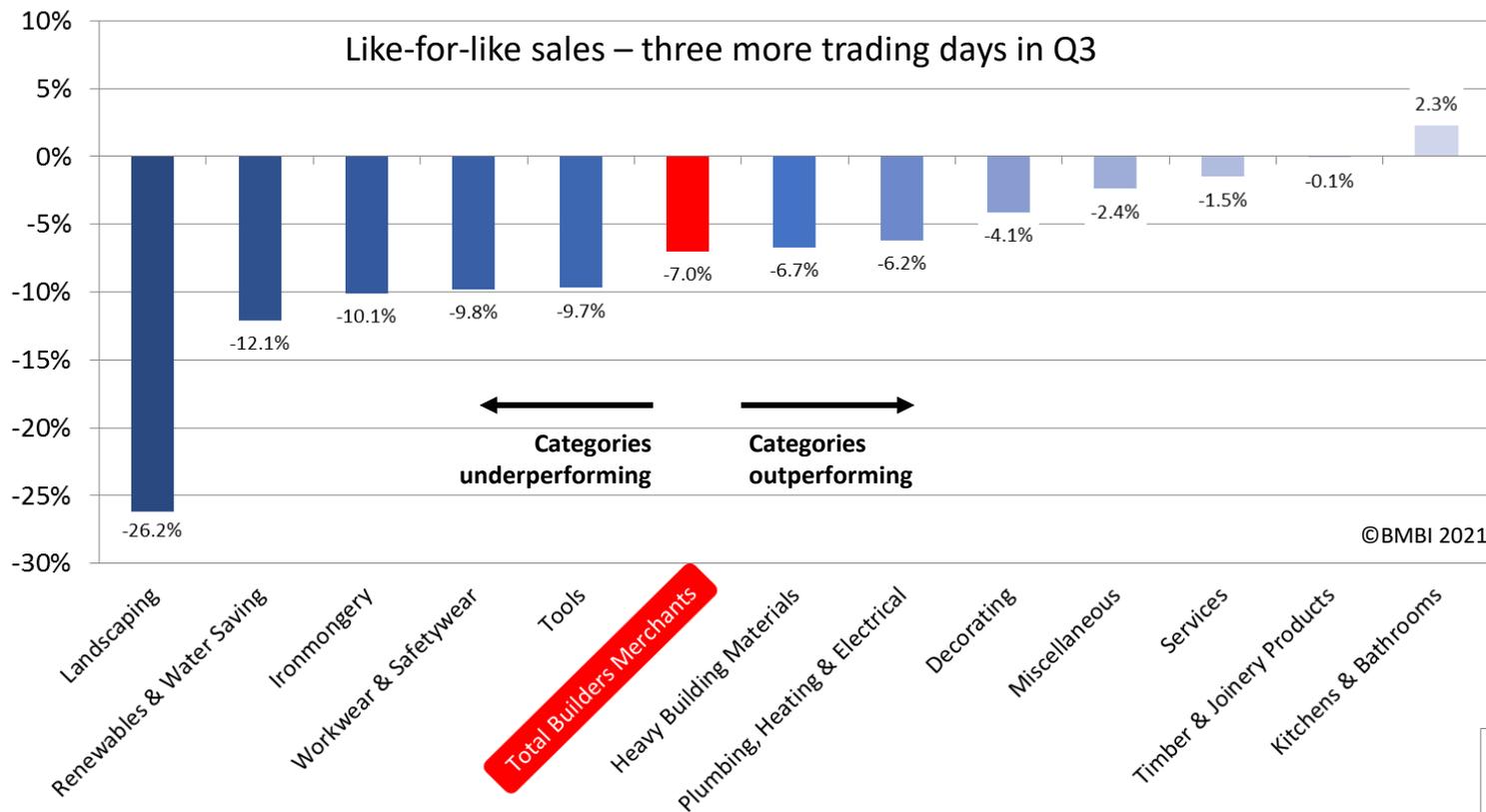
# Quarterly: Quarter on Quarter

## Q3 2021 like-for-like sales indices



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

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



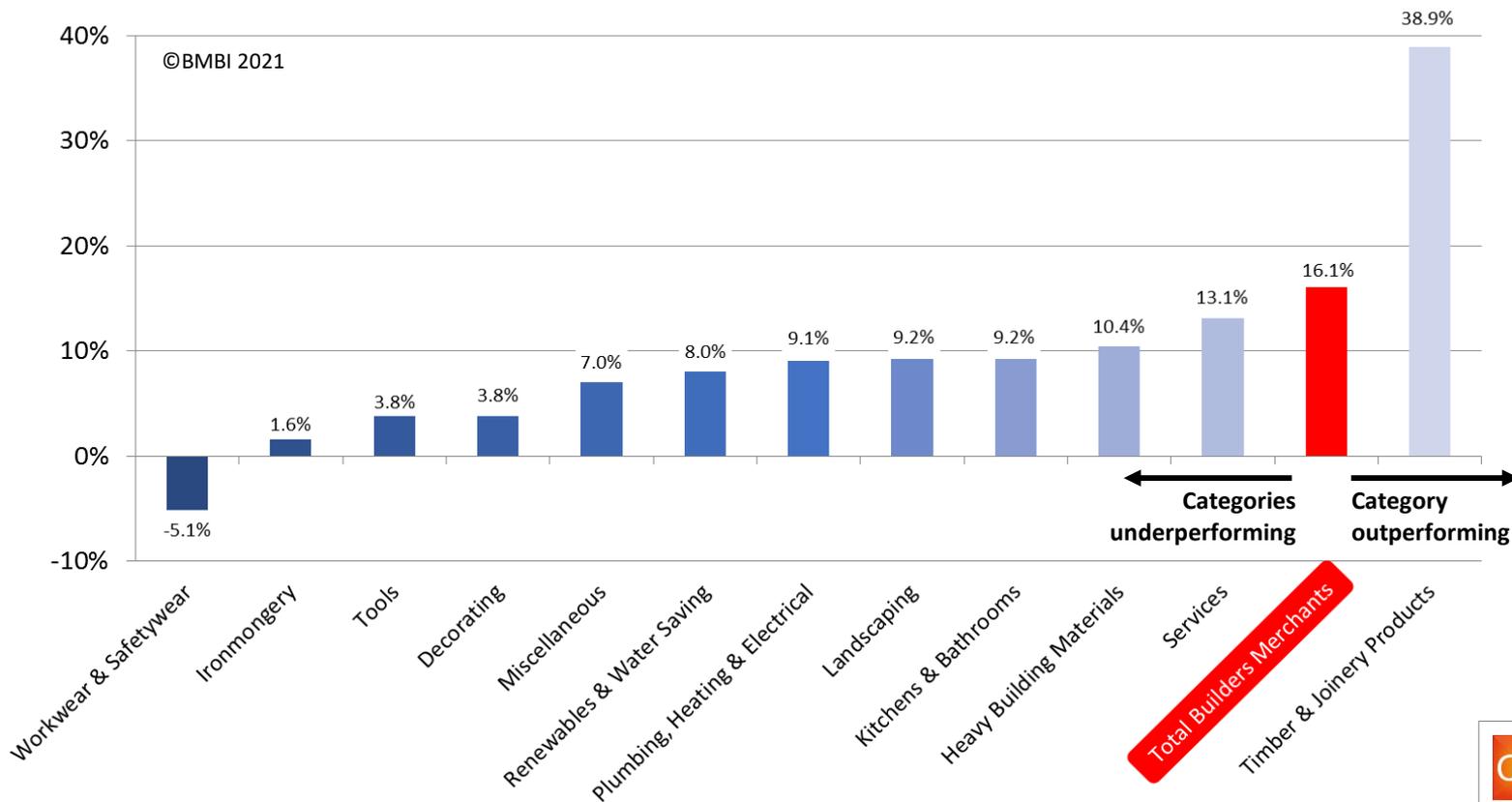
Source: GfK's Builders Merchants Total Category Report July 2015 to September 2021

# Latest 3 months: v last year

August to October sales indices



## 3 months Aug 21 to Oct 21 v 3 months Aug 20 to Oct 20

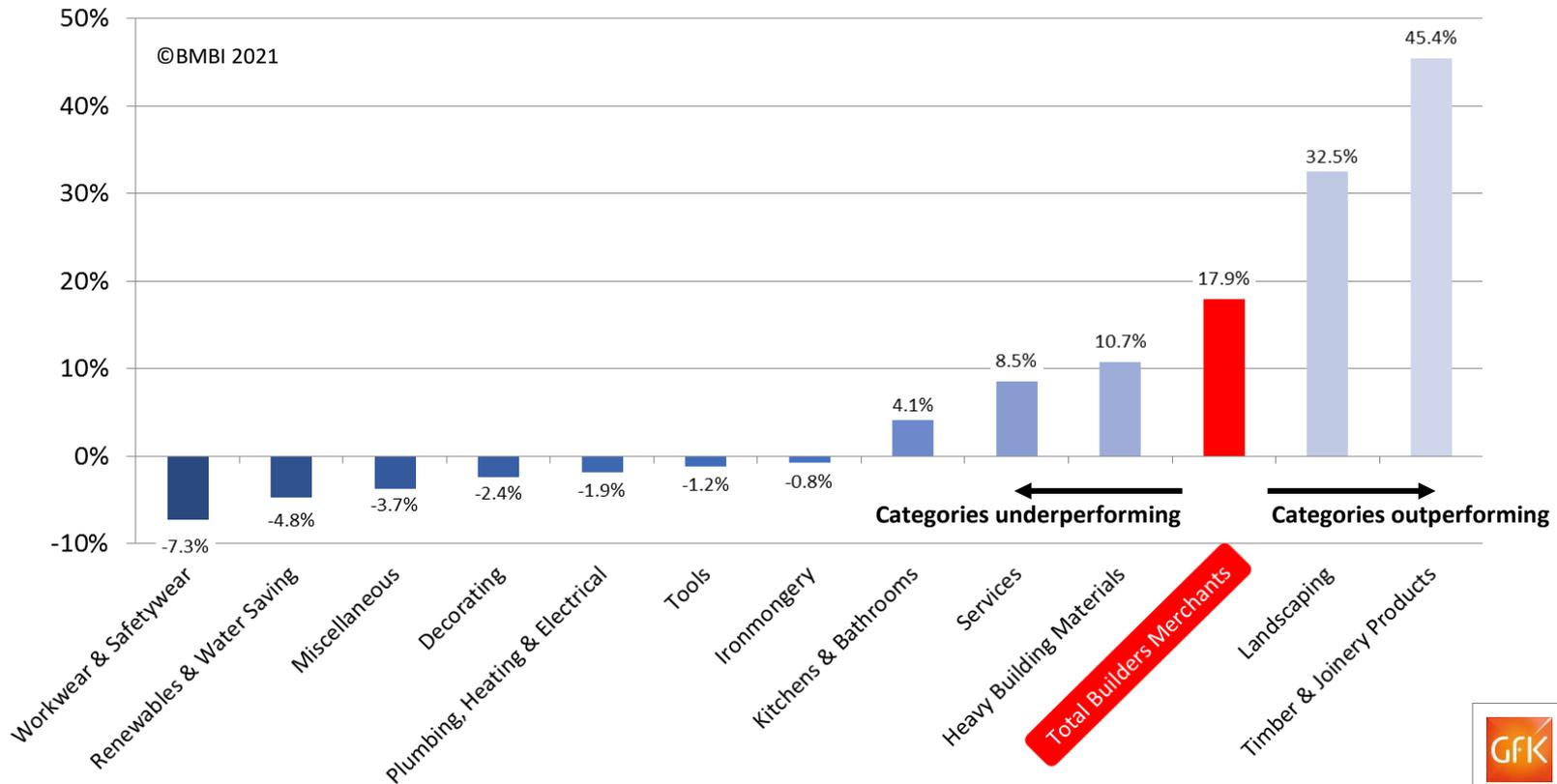


Source: GfK's Builders Merchants Total Category Report July 2015 to October 2021

# Latest 3 months: v 2019

August to October 2-year sales indices

## 2-year comparison: Aug 21 to Oct 21 v Aug 19 to Oct 19



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

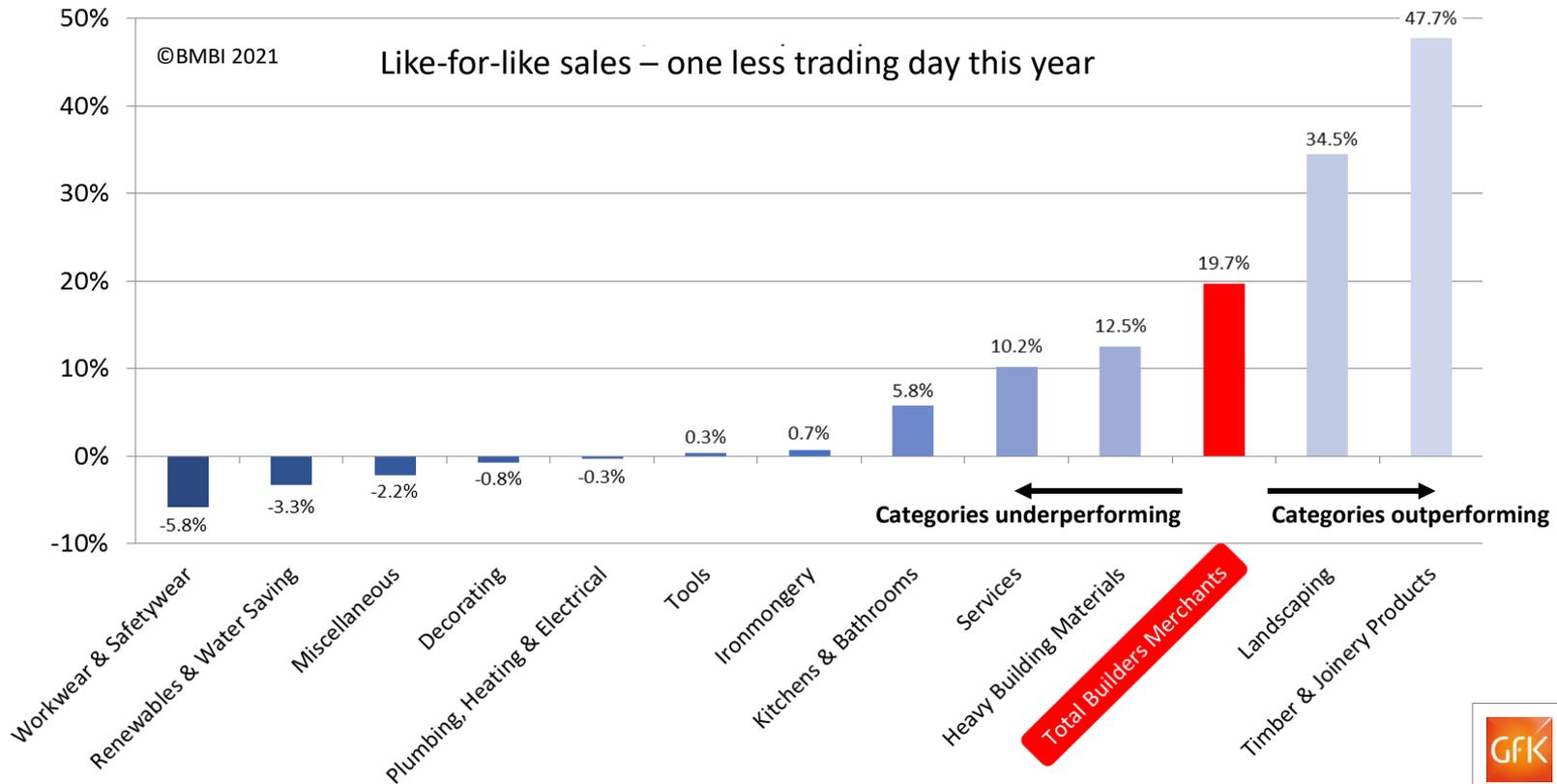
# Latest 3 months: v 2019

## August to October 2-year like-for-like sales indices



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

### 2-year comparison: Aug 21 to Oct 21 v Aug 19 to Oct 19



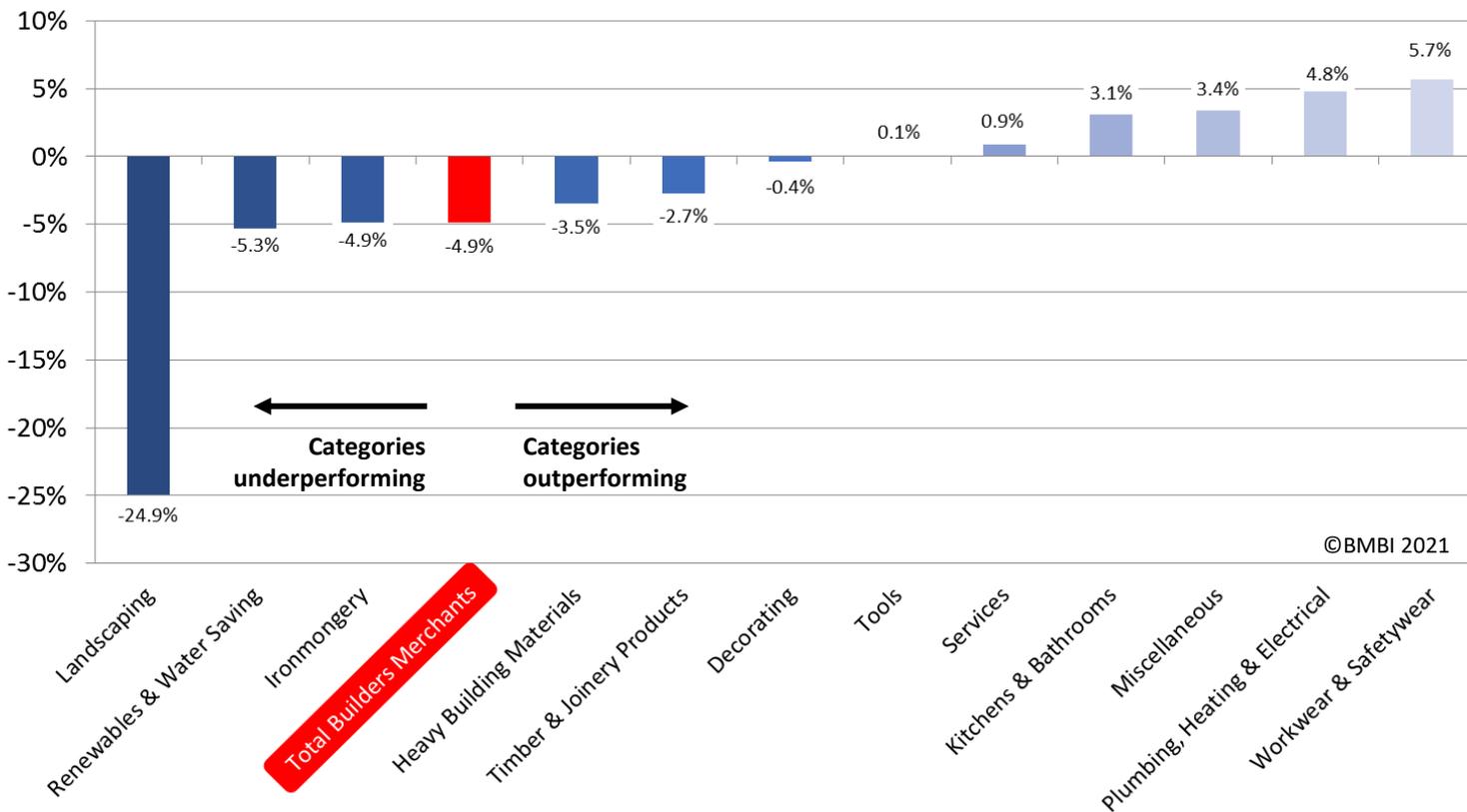
Source: GfK's Builders Merchants Total Category Report July 2015 to October 2021

# Latest 3 months: v previous 3 months

August to October sales indices



## 3 months Aug 21 to Oct 21 v 3 months May 21 to Jul 21



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

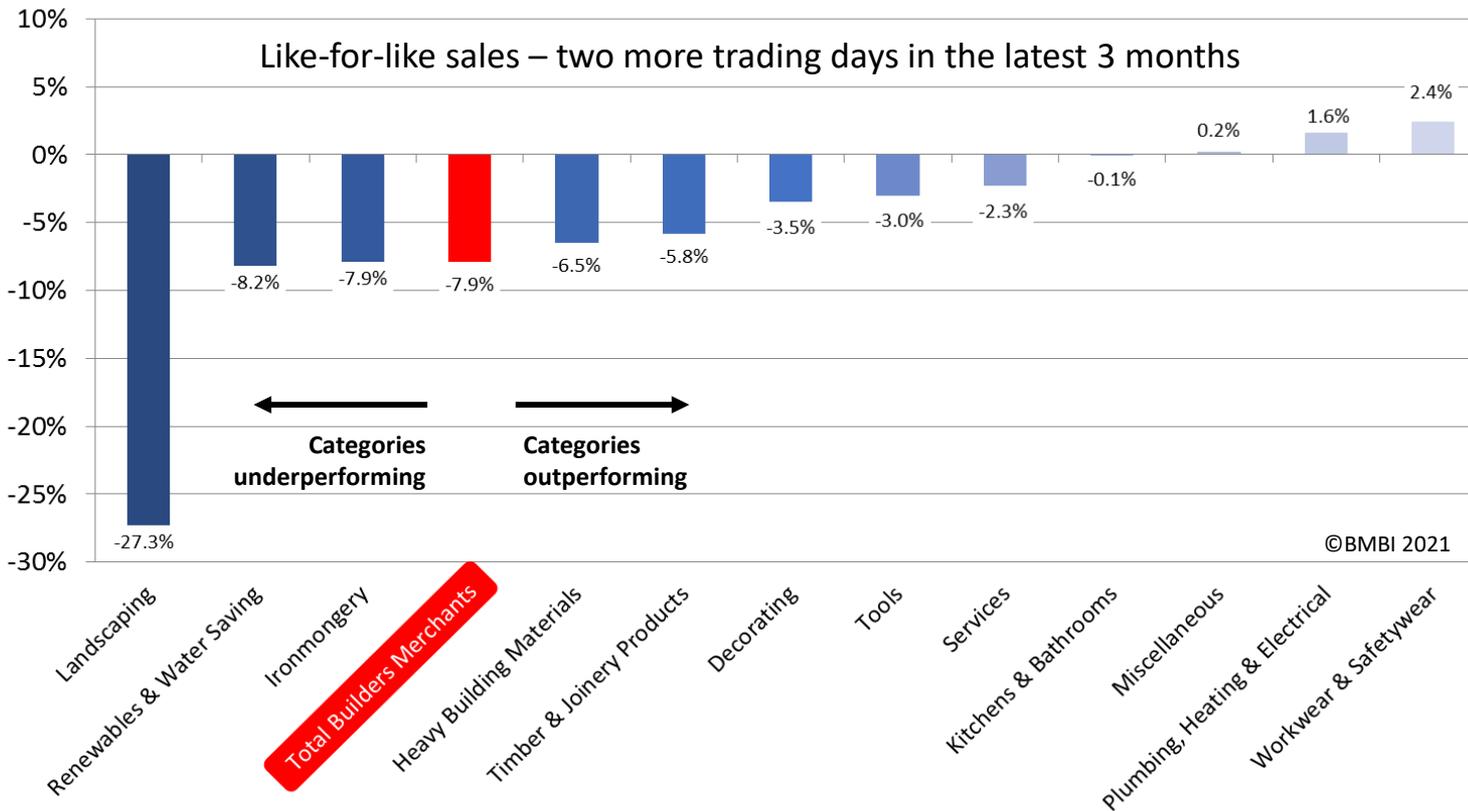
# Latest 3 months: v previous 3 months

August to October like-for-like sales indices



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

## 3 months Aug 21 to Oct 21 v 3 months May 21 to Jul 21

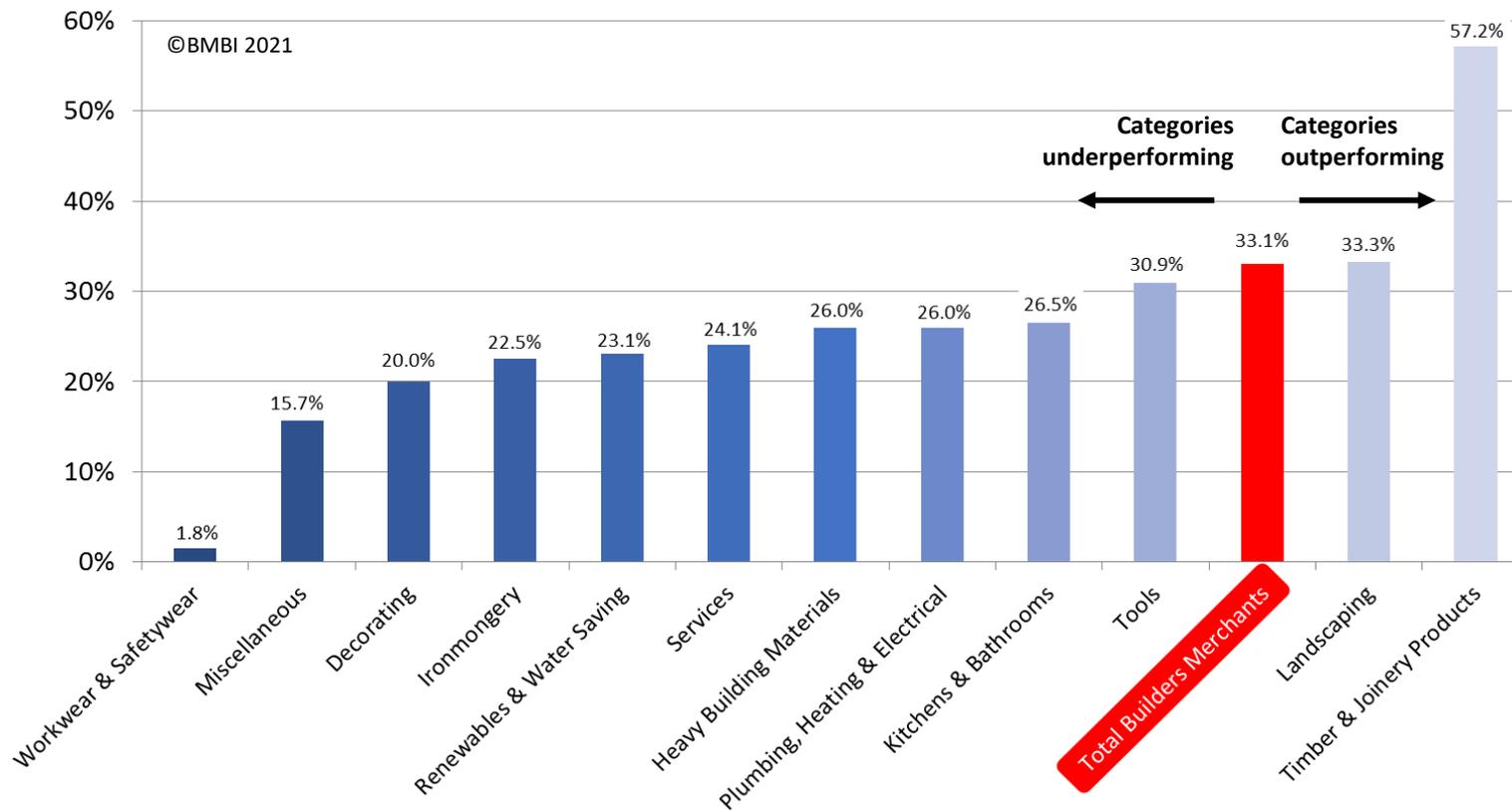


Source: GfK's Builders Merchants Total Category Report July 2015 to October 2021

# Year to date: Year on Year

Last 10 months sales indices

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



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

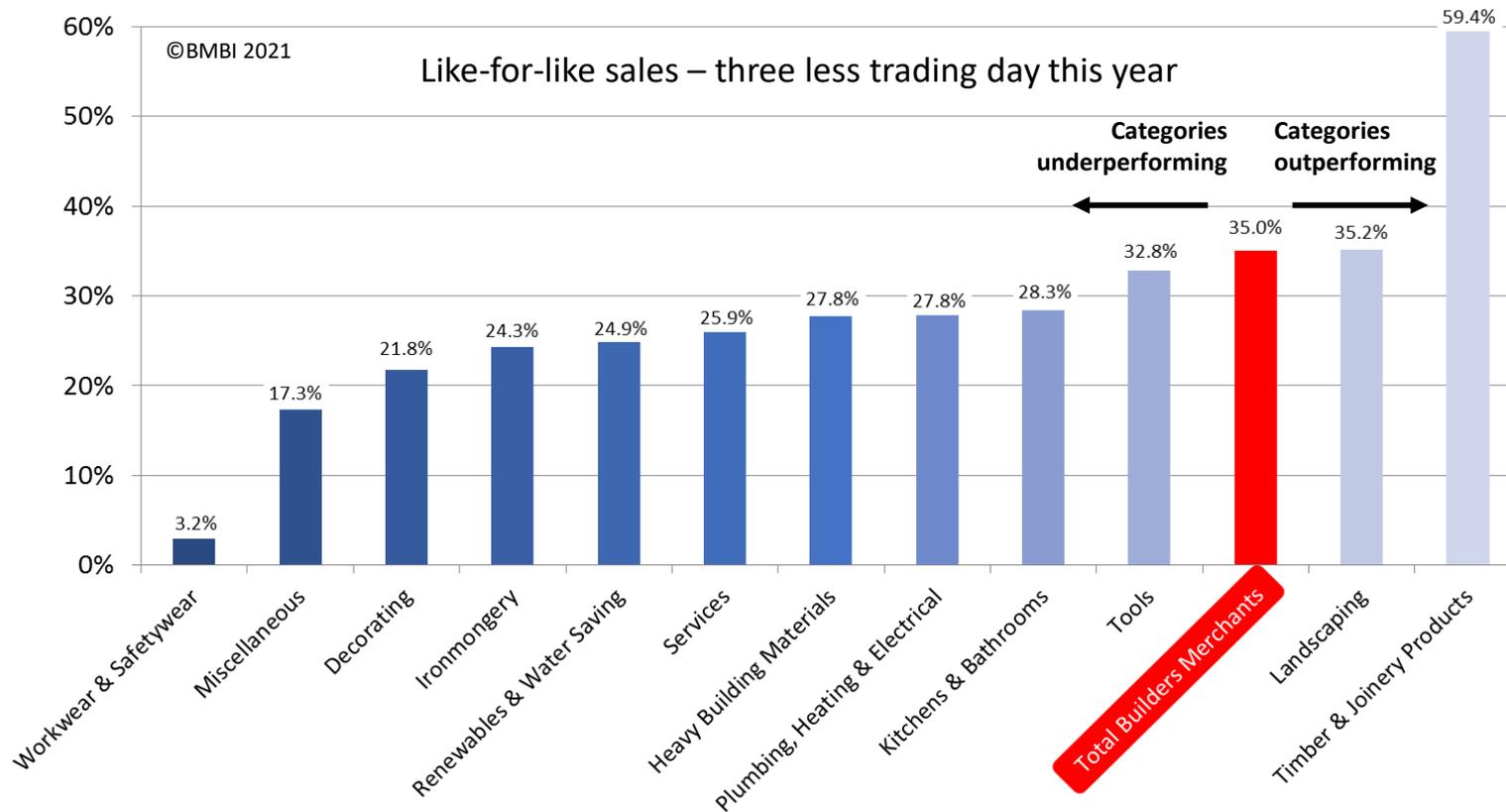
# Year to date: Year on Year

Last 10 months like-for-like sales indices



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

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

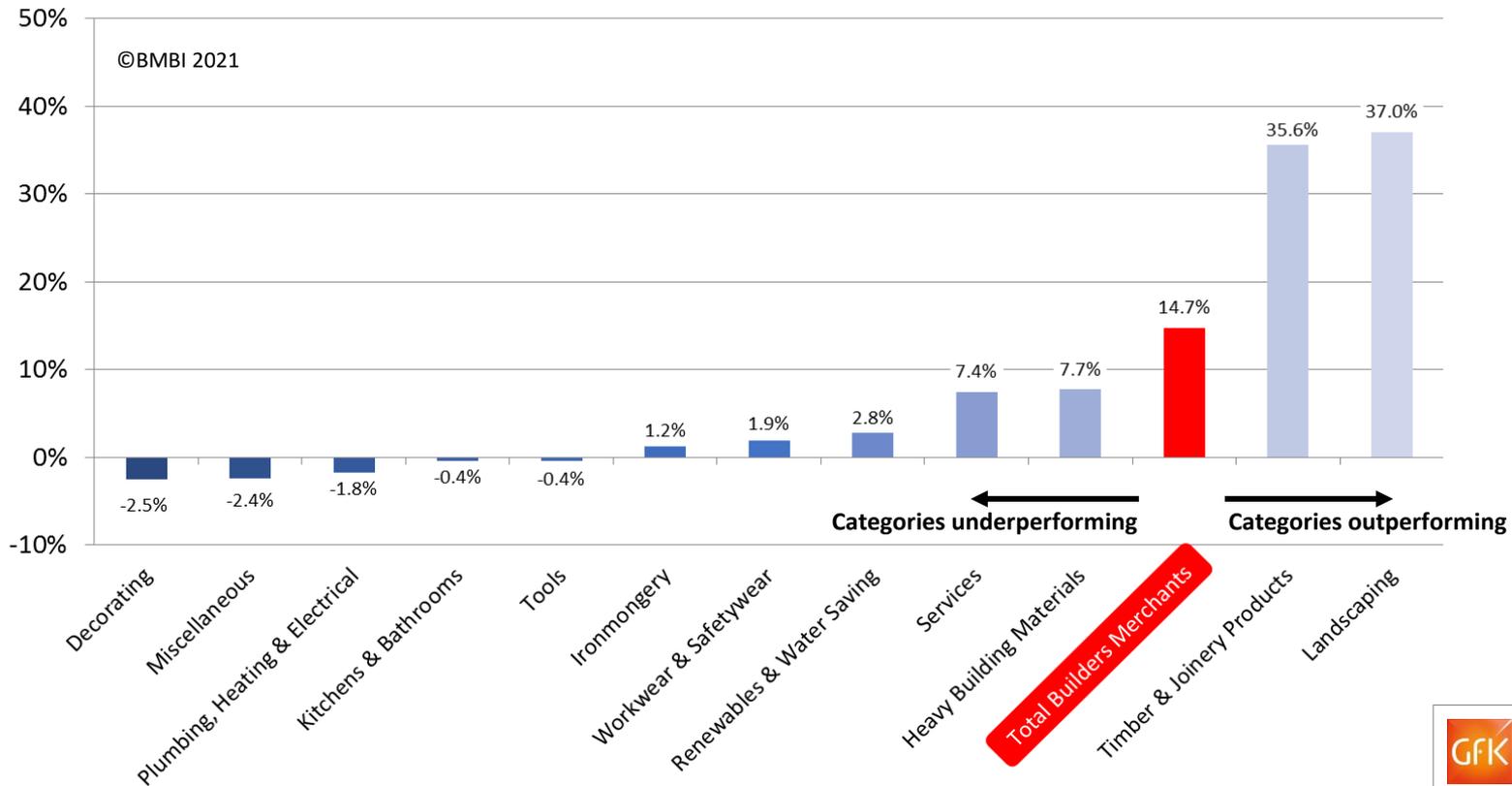


Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Year to date: v 2019

Last 10 months 2-year sales indices

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



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

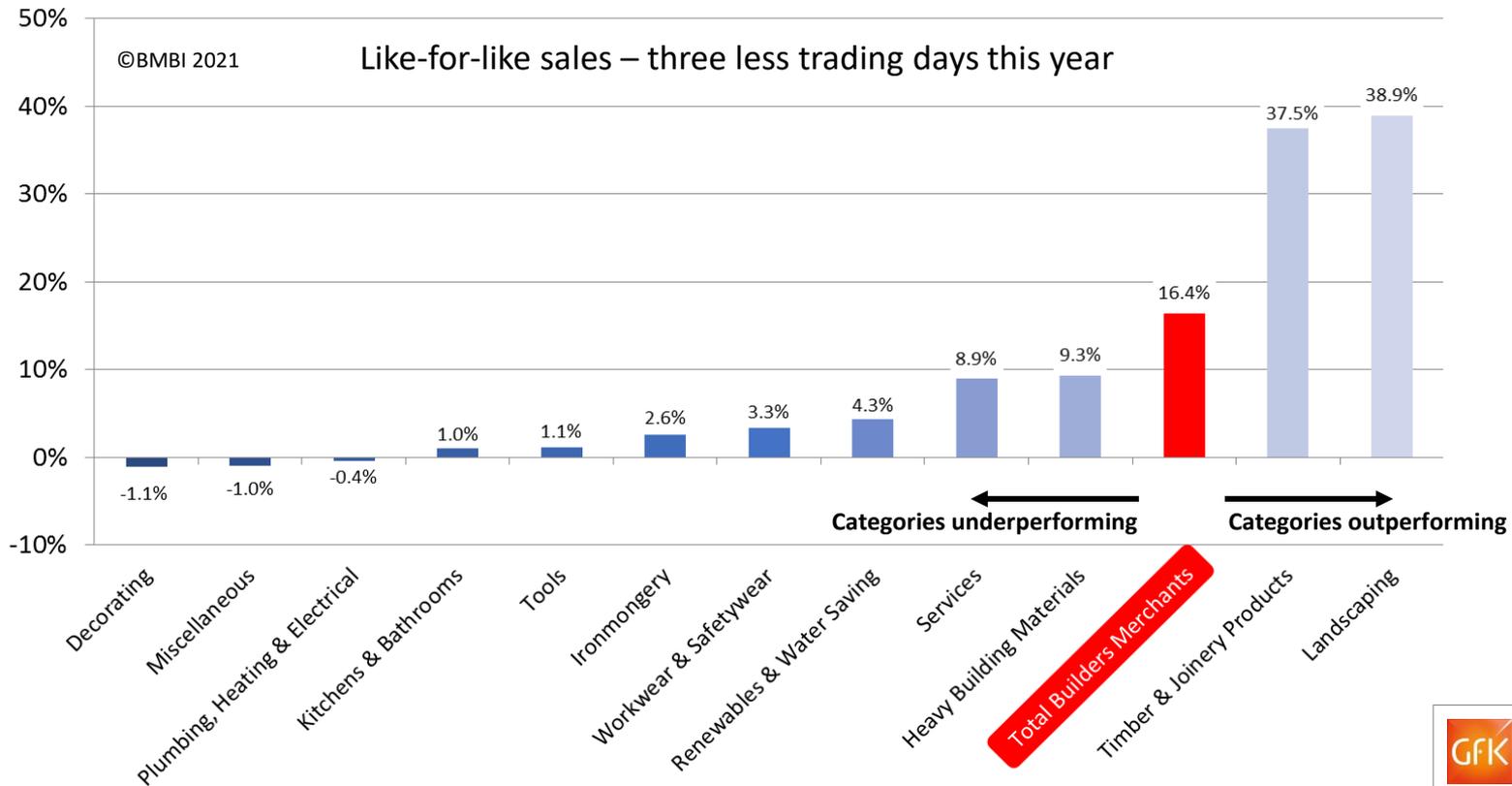
# Year to date: v 2019

## Last 10 months 2-year like-for-like sales indices



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

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



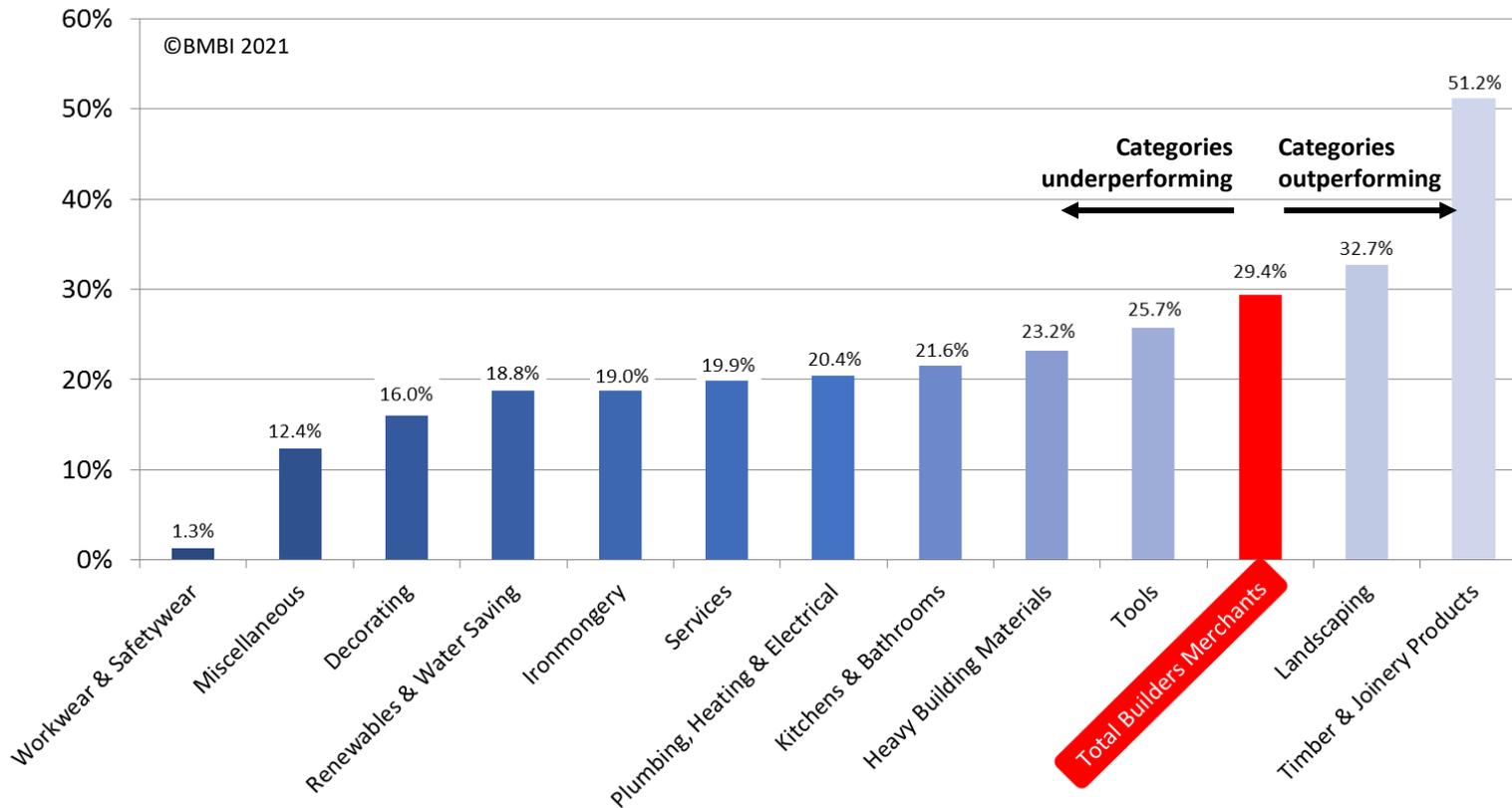
Source: GfK's Builders Merchants Total Category Report July 2015 to October 2021

# Last 12 months: Year on Year

MAT sales indices



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



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

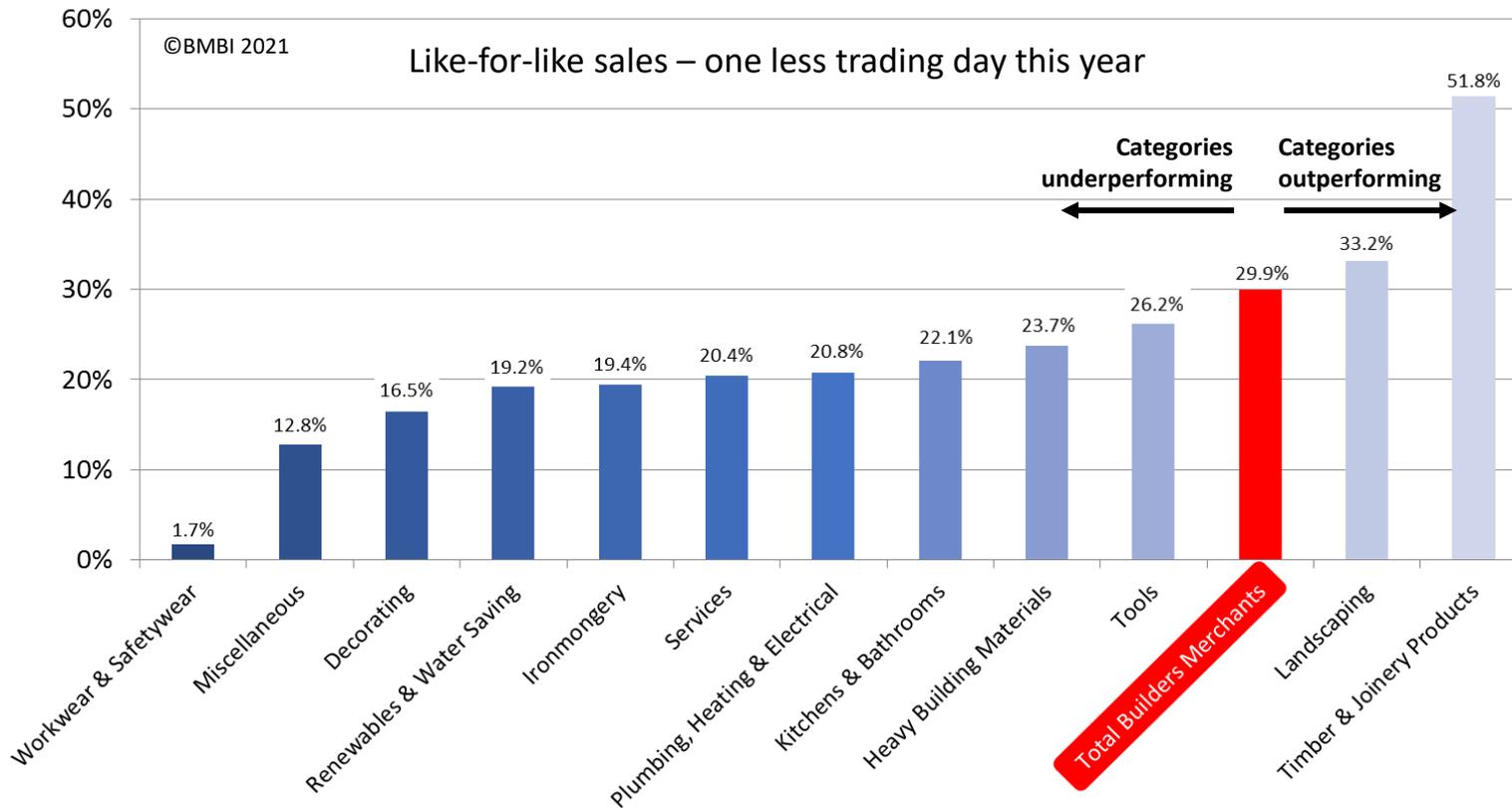
# Last 12 months: Year on Year

## MAT like-for-like sales indices



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

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



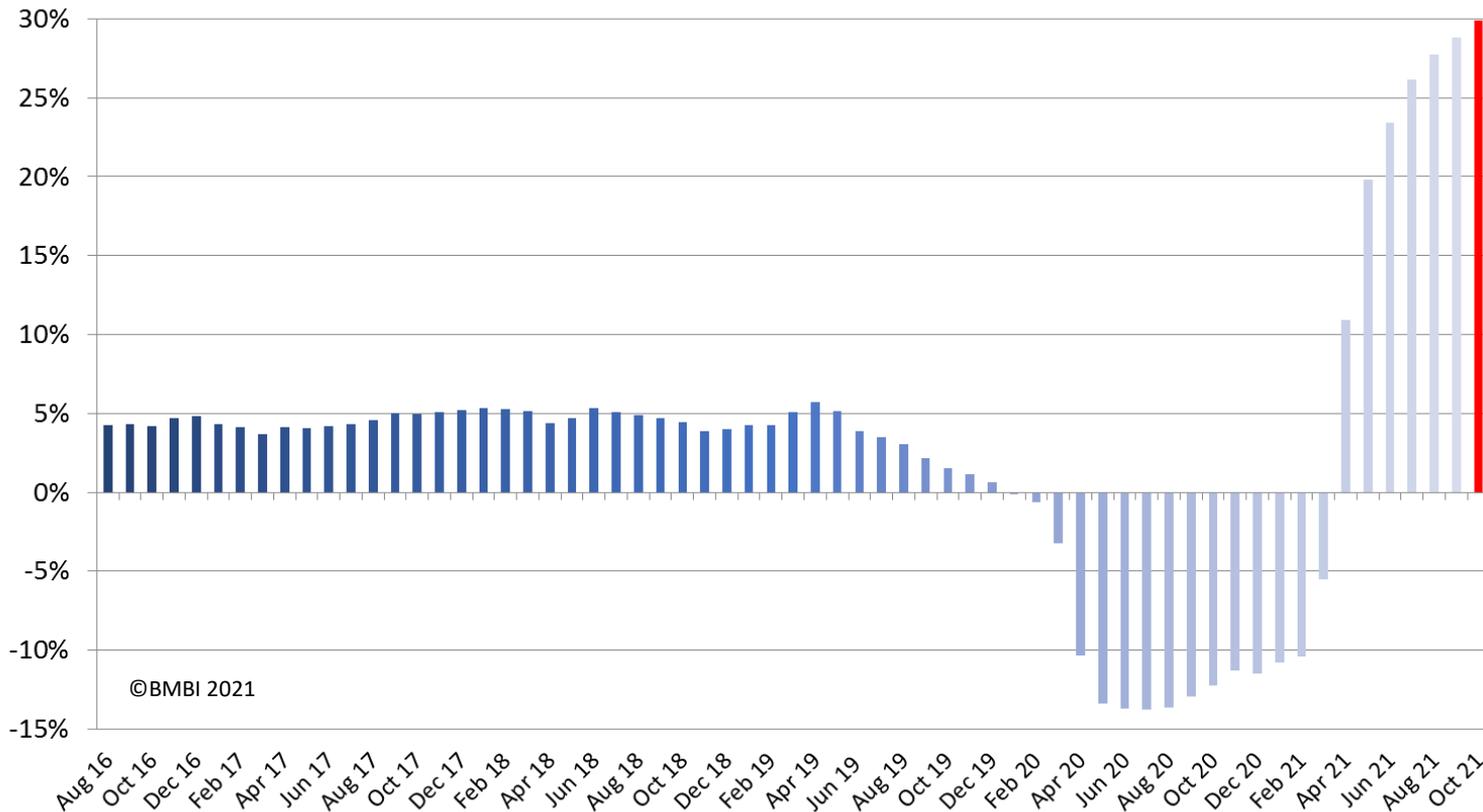
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# 12 months: Year on Year

MAT sales indices



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



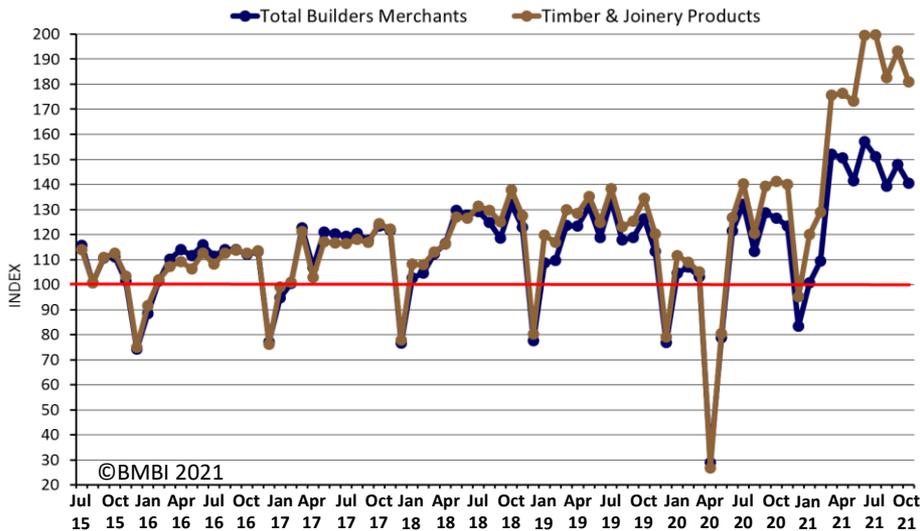
©BMBI 2021

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

# Monthly: Indices

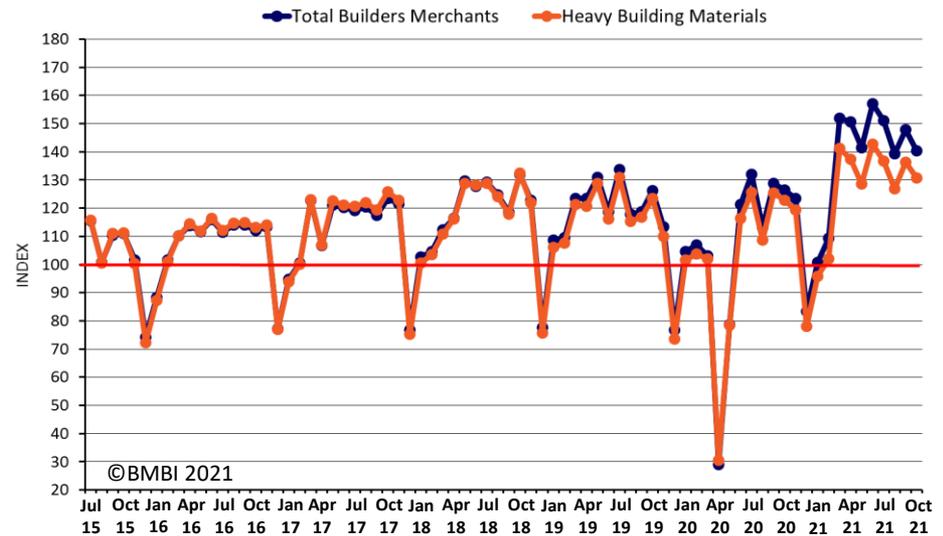
October 2021

## Timber & Joinery Products



Indexed on July 2014 – June 2015

## Heavy Building Materials



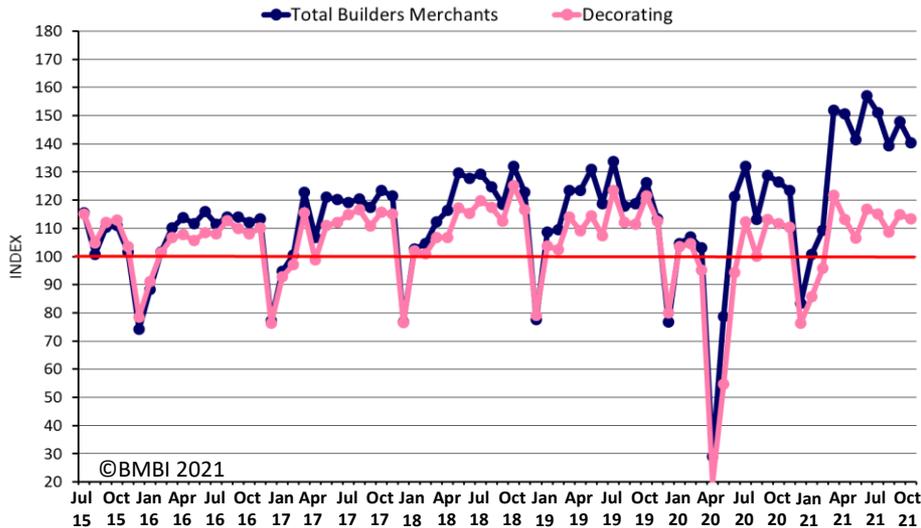
Indexed on July 2014 – June 2015

# Monthly: Indices

October 2021

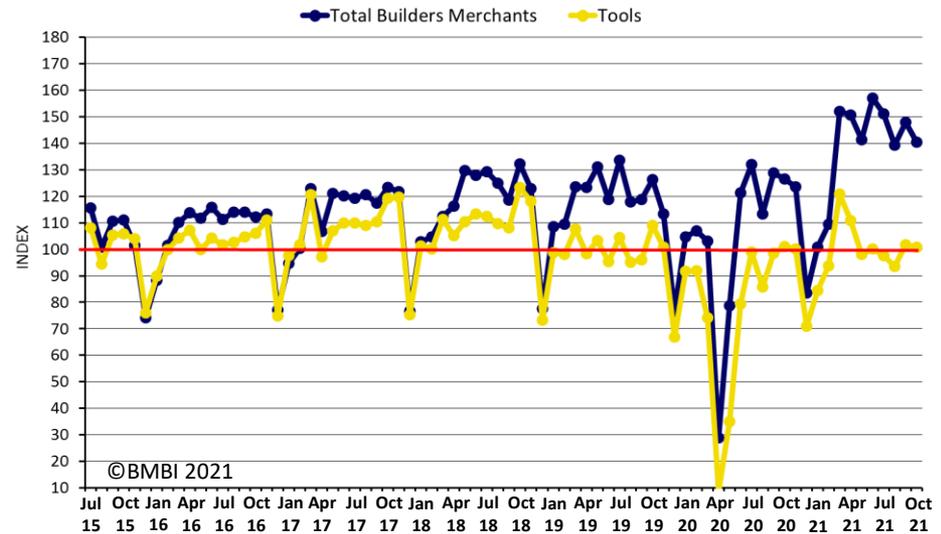


## Decorating



Indexed on July 2014 – June 2015

## Tools



Indexed on July 2014 – June 2015

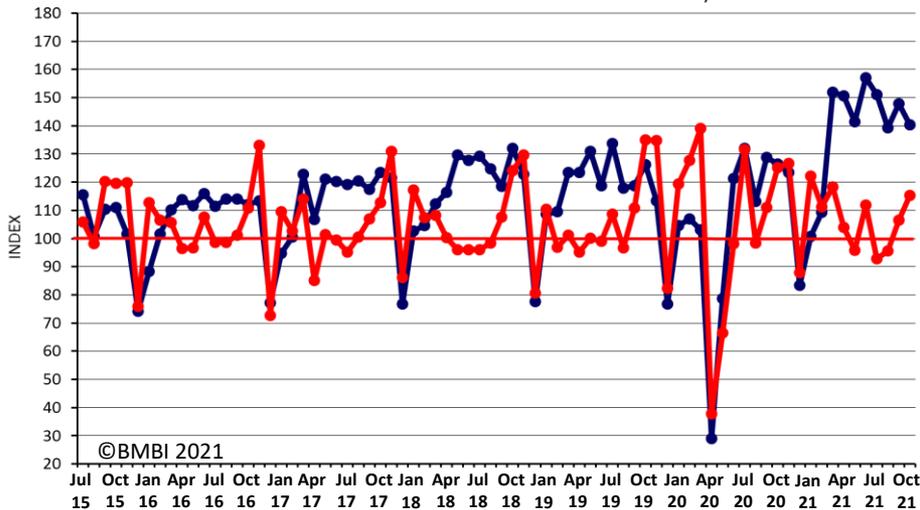
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: Indices

October 2021

## Workwear & Safetywear

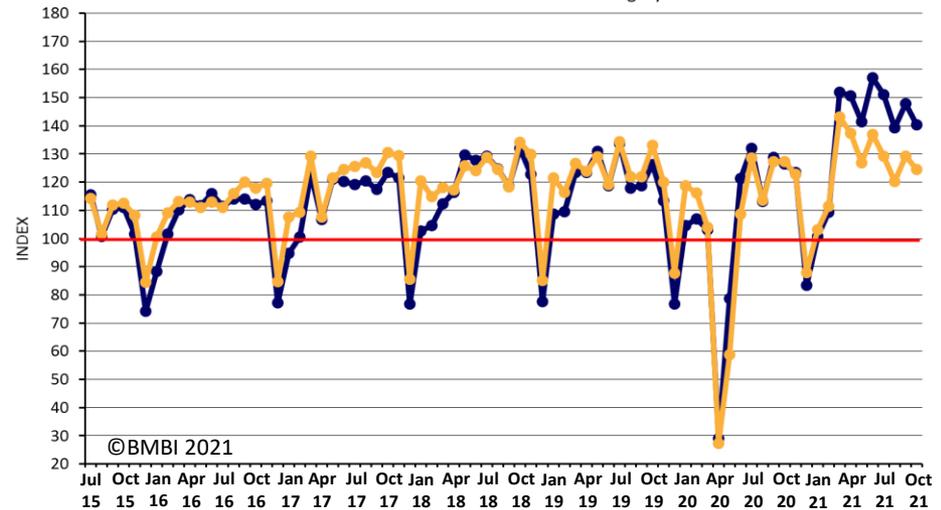
— Total Builders Merchants — Workwear & Safetywear



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 October 2021

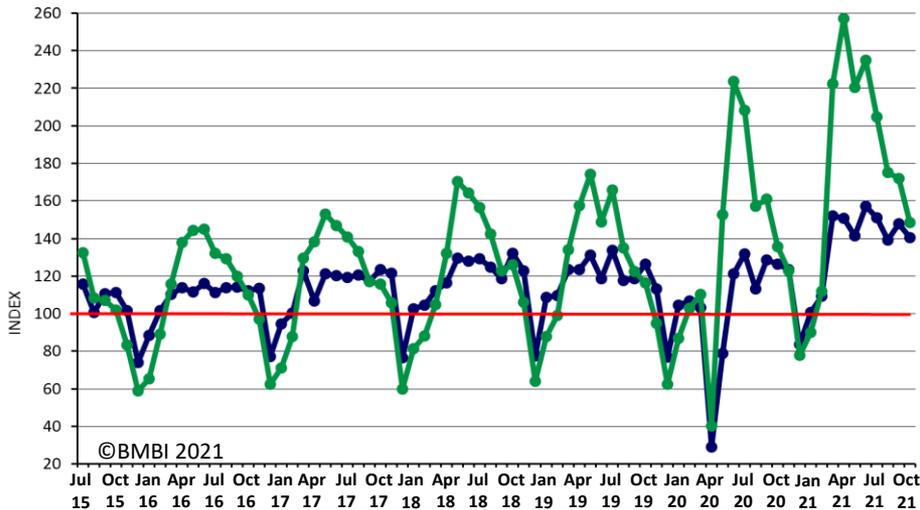
# Monthly: Indices

October 2021



## Landscaping

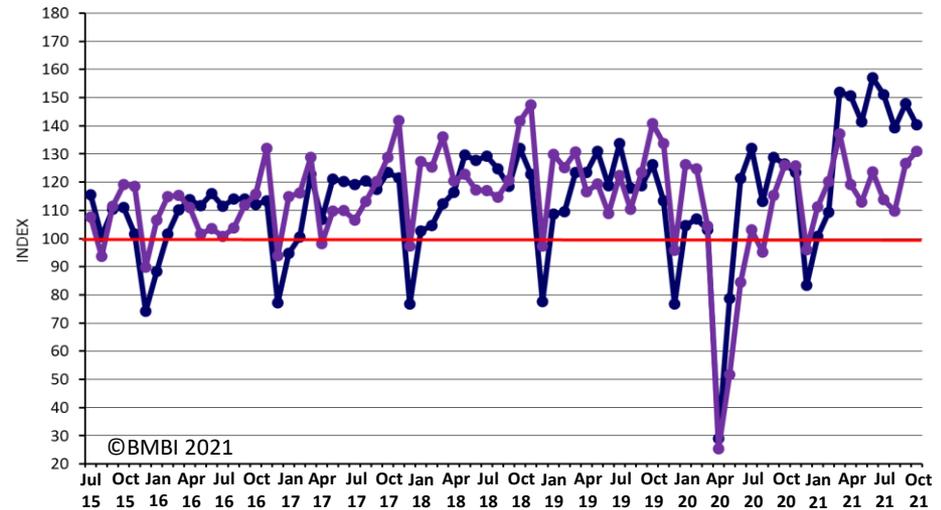
● Total Builders Merchants ● Landscaping



Indexed on July 2014 – June 2015

## Plumbing, Heating & Electrical

● Total Builders Merchants ● Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

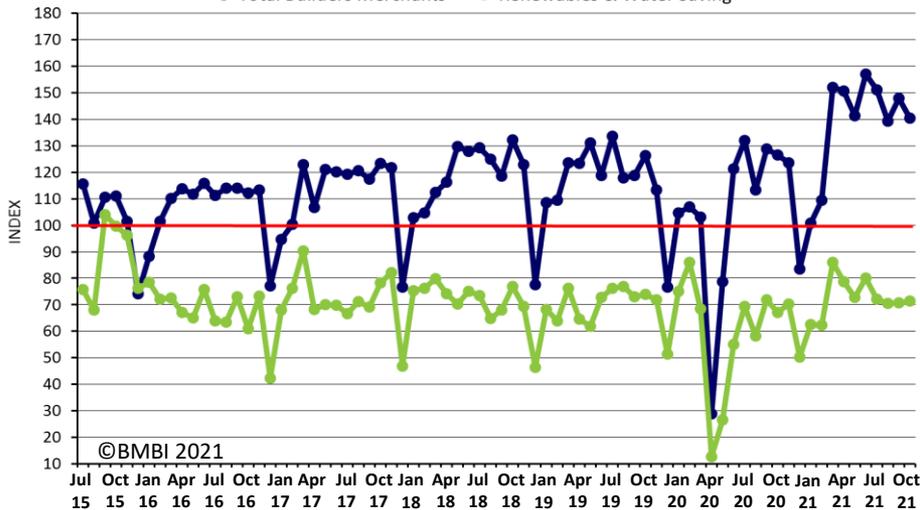
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to October 2021

# Monthly: Indices

## October 2021

### Renewables & Water Saving

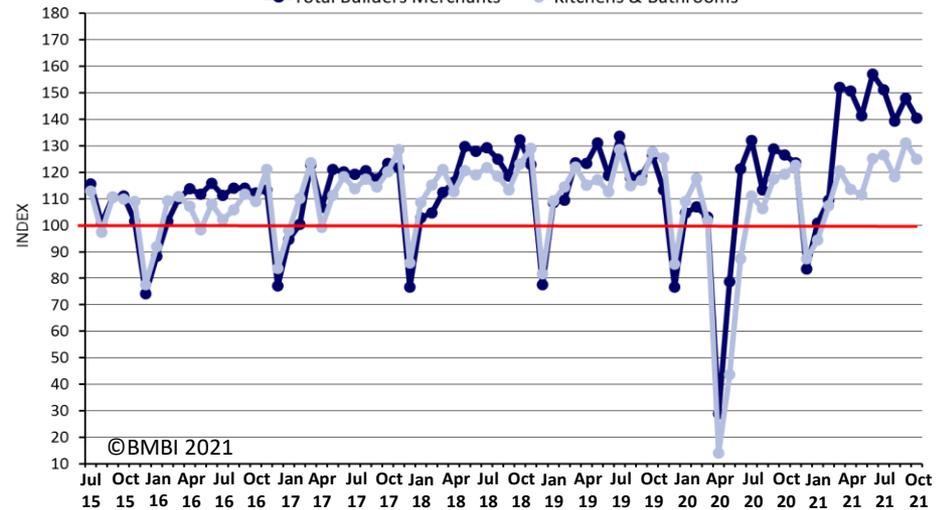
■ Total Builders Merchants ■ Renewables & Water Saving



Indexed on July 2014 – June 2015

### Kitchens & Bathrooms

■ Total Builders Merchants ■ Kitchens & Bathrooms



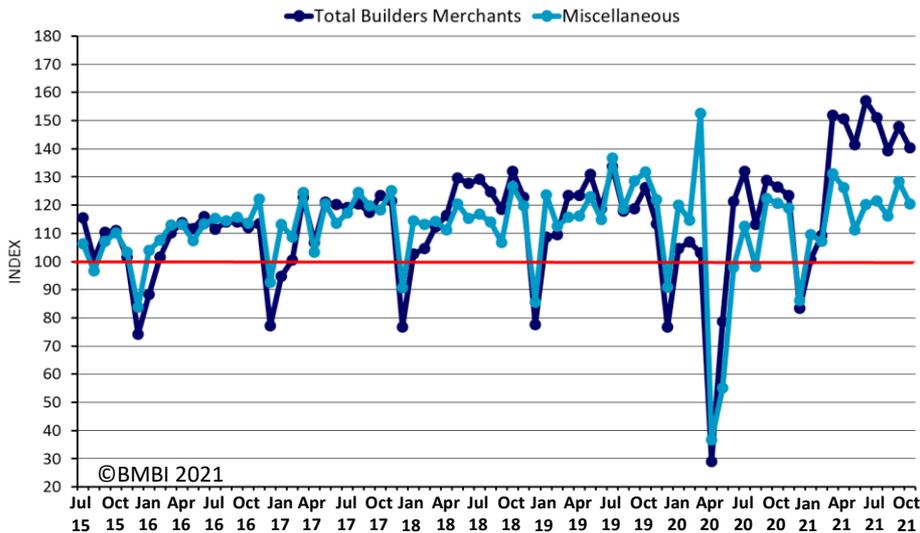
Indexed on July 2014 – June 2015

# Monthly: Indices

October 2021

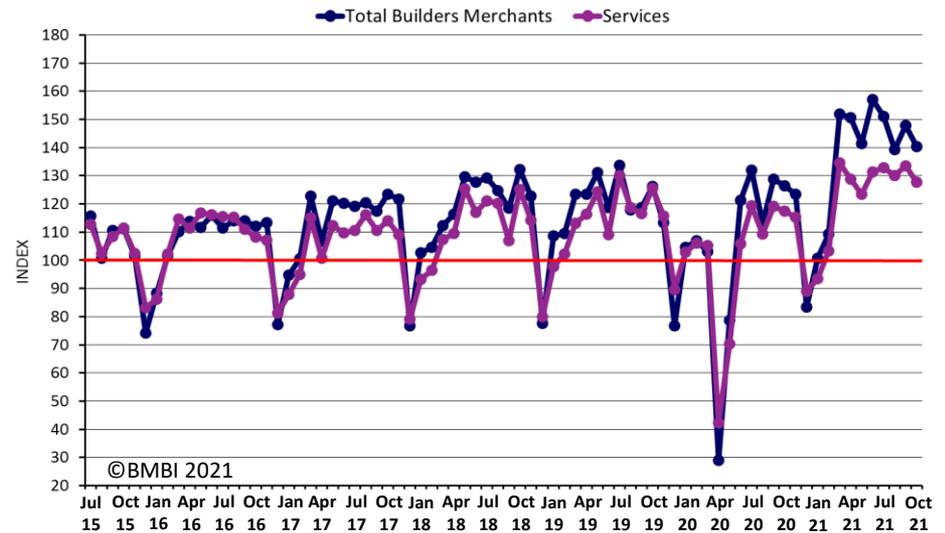


## Miscellaneous



Indexed on July 2014 – June 2015

## Services



Indexed on July 2014 – June 2015

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

# Trading Days

## Monthly

Index: 20.8

2015											
						Jul 22	Aug 20	Sep 22	Oct 22	Nov 21	Dec 17
2016											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	21	21	21	20	22	21	22	22	21	22	17
2017											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	23	18	21	22	21	22	21	22	22	16
2018											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	21	21	22	22	20	23	22	15
2019											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	21	20	23	21	21	23	21	15
2020											
Jan	Feb	Mar*	Apr*	May*	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	20	19	22	21	21	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	64	

## 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.

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

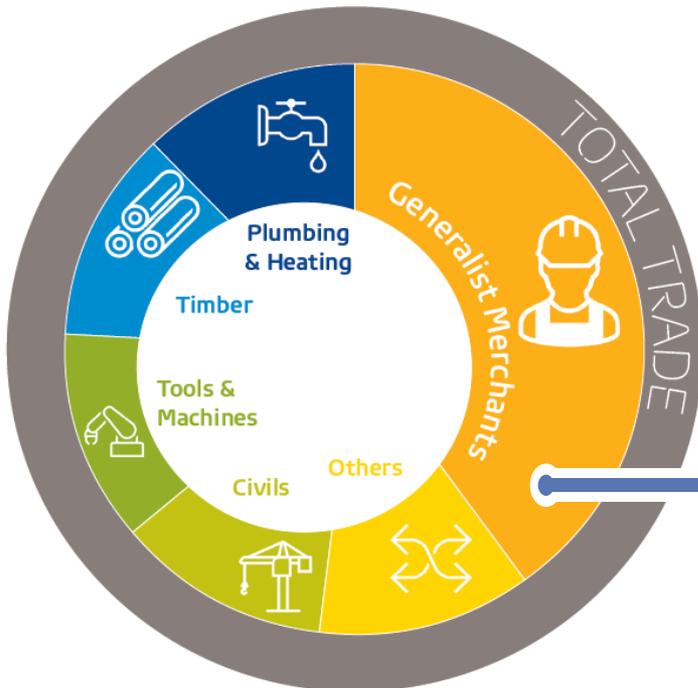
# GfK's Definition of Builders Merchant Panel



## Generalist Builders Merchants definition:

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

Examples include:



# GfK Insights Methodology



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

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

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

# GfK's Product Categories

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



## Headline values available

### Timber & Joinery Products

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

### Heavy Building Materials

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

### Decorating

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

### Tools

Hand Tools  
Power Tools  
Power Tool Accessories  
Ladders & Access Equipment

### Workwear And Safetywear

Clothing  
Safety Equipment

### Ironmongery

Fixings And Fastenings  
Security  
Other Ironmongery

### Landscaping

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

### Plumbing Heating & Electrical

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

### Renewables And Water Management

Water Saving  
Renewables & Ventilation

### Kitchens & Bathrooms

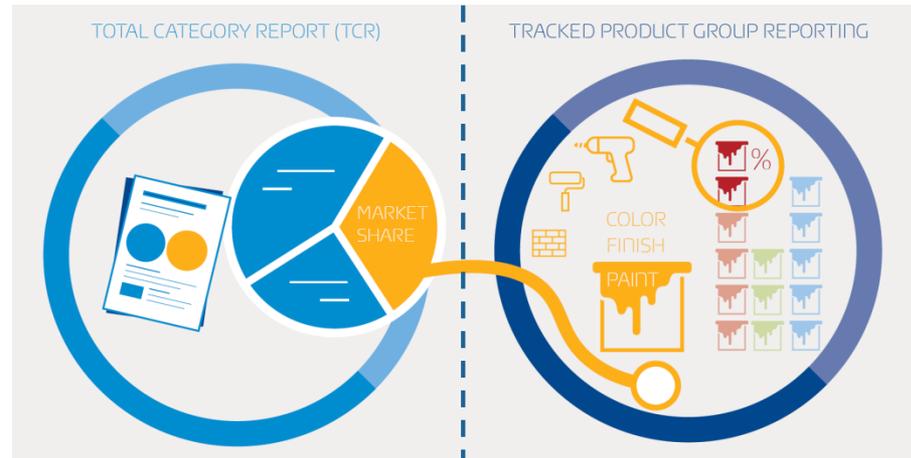
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

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

### Services

Toolhire / Hire Services  
Other Services



## In-depth product group reporting

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

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

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

### Available categories:

#### Heavyside

Bricks  
Insulation

#### Lightside

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

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**October 2021**

(Published 16 December 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 Toby Aitken: [toby.aitken@mra-research.co.uk](mailto:toby.aitken@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).

## October sales up 6.0% on September but 3.5% down on October last year

Total plumbing and heating value sales, from over 80% of specialist Plumbing & Heating merchants throughout Great Britain, were 3.5% lower in October 2021 compared to October 2020 (see [page 61](#)), with one less trading day this year. Like-for-like sales, which take trading day differences into account, were 1.0% higher. Compared with two years ago, total value in October 2021 were 4.9% lower than in October 2019, with two less trading days ([page 62](#)). Like-for-like sales were 4.1% higher.

Total value sales in October were 6.0% higher than in September, with one less trading day this month ([page 63](#)). Like-for-like sales were 11.1% higher.

October's PHMI Index, which contrasts sales with the base period of January to December 2019, was 111.1 – see the table on [page 59](#) and the chart on [page 60](#). The PHMI Index for the last three months (June to August) was slightly lower (103.0).

Sales in the three months August to October 2021 were up 1.6% compared with the same three months last year, with no difference in trading days ([page 64](#)).

Compared with the same months two years ago, total sales in the three months August to October 2021 were flat (-0.1%), with one less trading day this year. Like-for-like sales increased by 1.4%.

Sales in August to October were 4.3% higher than in the preceding three months, May to July, with two more trading day in the most recent period ([page 65](#)). Like-for-like sales were up 1.0%.

Sales in the first ten months of 2021 were 21.4% higher than in Covid-affected January to October 2020, with three less trading days this year ([page 69](#)). Like-for-like sales were 23.1% higher.

Looking back two years, sales in January to October 2021 were 2.1% higher than the same ten months in 2019, with three less trading days this year ([page 70](#)). Like-for-like sales were 3.6% higher.

Plumbing & Heating Merchants' sales in the 12 months November 2020 to October 2021 were 17.4% ahead of November 2019 to October 2020, with one less trading day in the most recent period ([page 71](#)). Like-for-like sales increased by 17.9%.

Sales in October were 3.5% less than last year and 4.9% below October 2019. In the three months August to October, sales increased by 1.6% on 2020 but were flat (-0.1%) compared with 2019.

# Indices: Monthly and quarterly

November 2020 to October 2021

(Indexed on January to December 2019)

<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
<b>Aug 21</b>	<b>Sep 21</b>	<b>Oct 21</b>	<b>Three months</b>
93.0	104.8	111.1	103.0

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' index of 111.1 means turnover was 11.1% above the base period.
- Values below 100 indicate lower turnover in that period. August's Index of 93.0 means turnover was 7.0% lower than the base period.

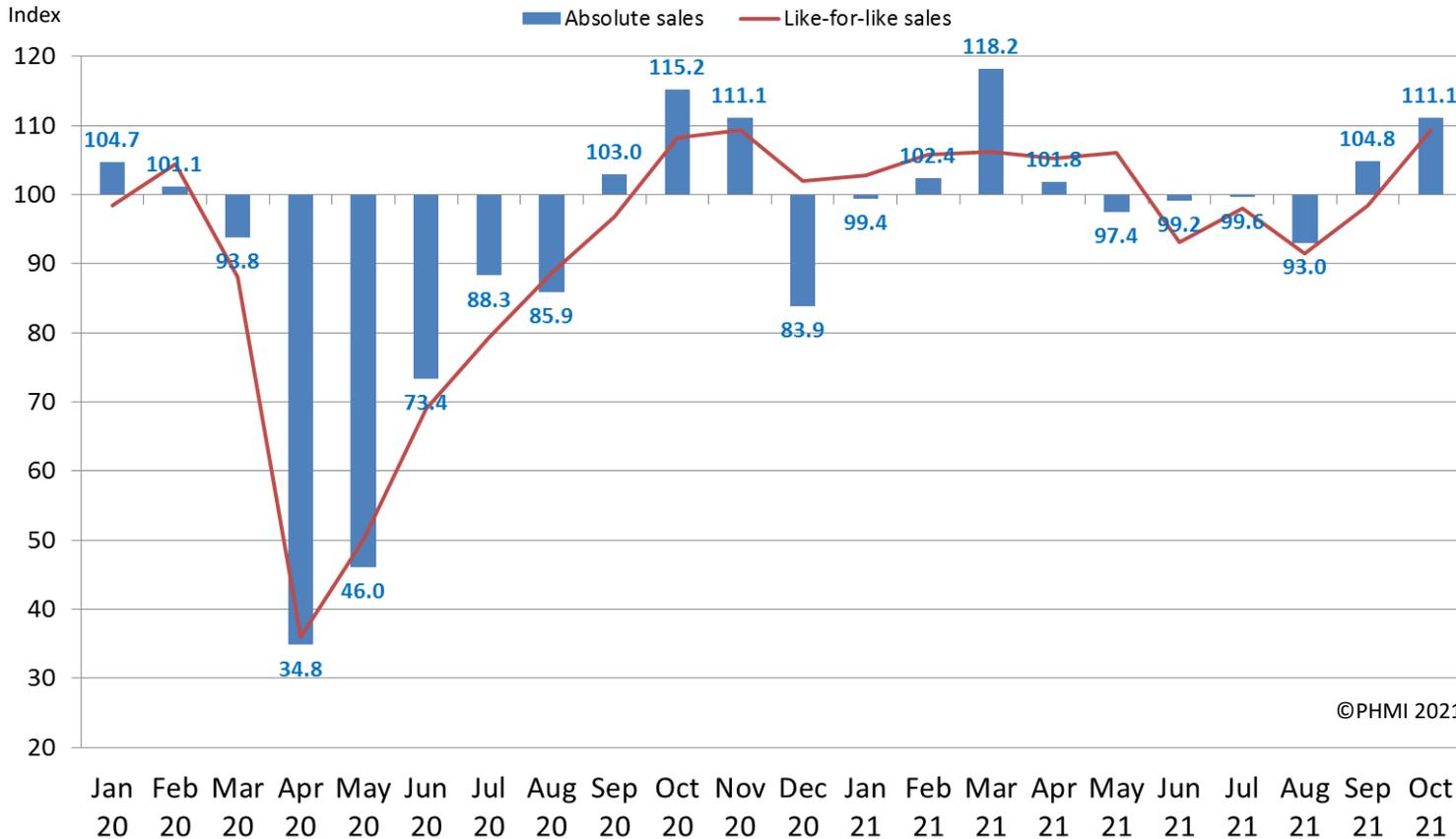
 **Source:** GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Oct 2021

# Monthly: Index

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

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

## Indices: January 2020 to October 2021



Values shown for Total sales

©PHMI 2021

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

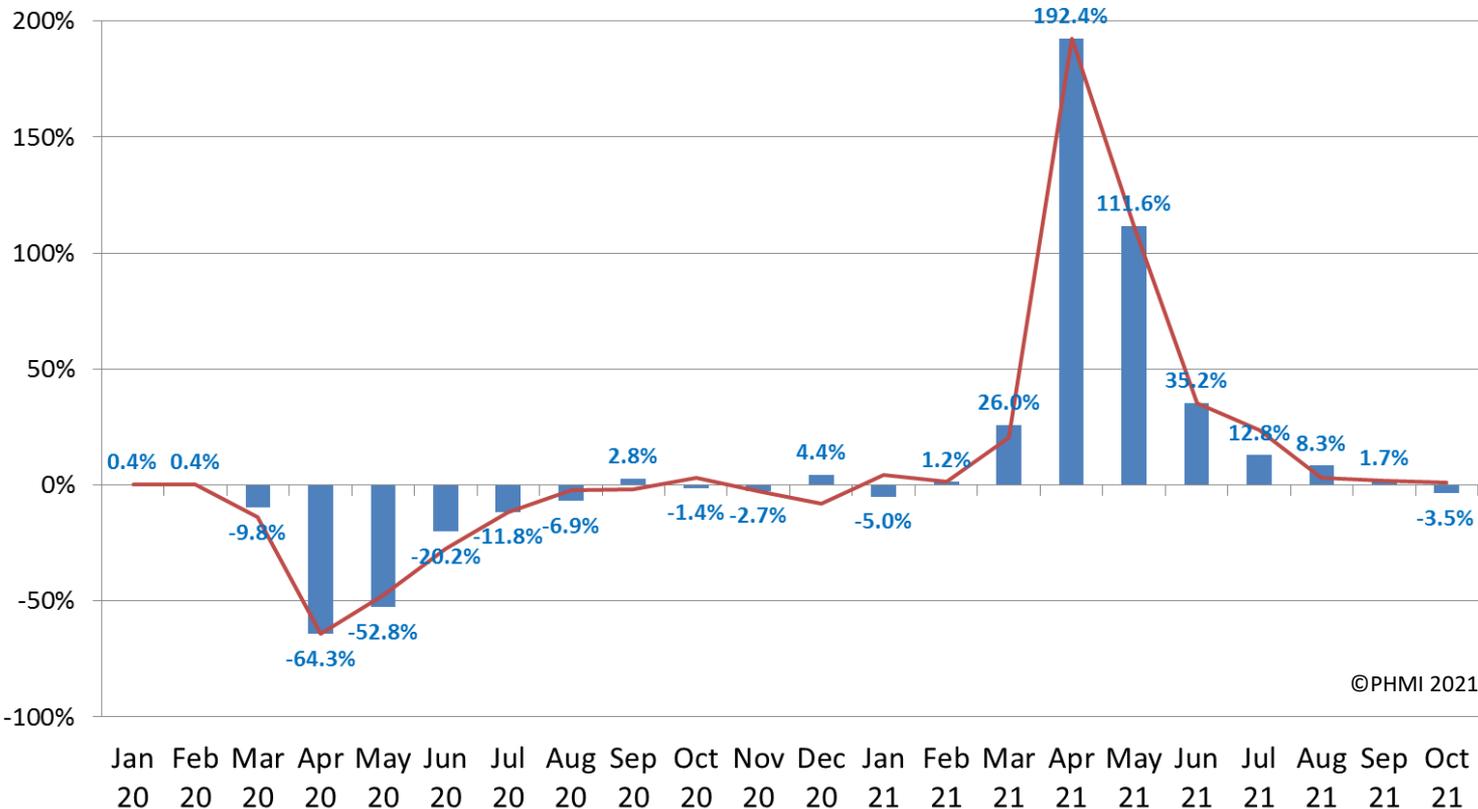
# Monthly: This Year v Last Year

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

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

### Month: year on year

■ Absolute sales — Like-for-like sales



Values shown for Total sales

©PHMI 2021

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

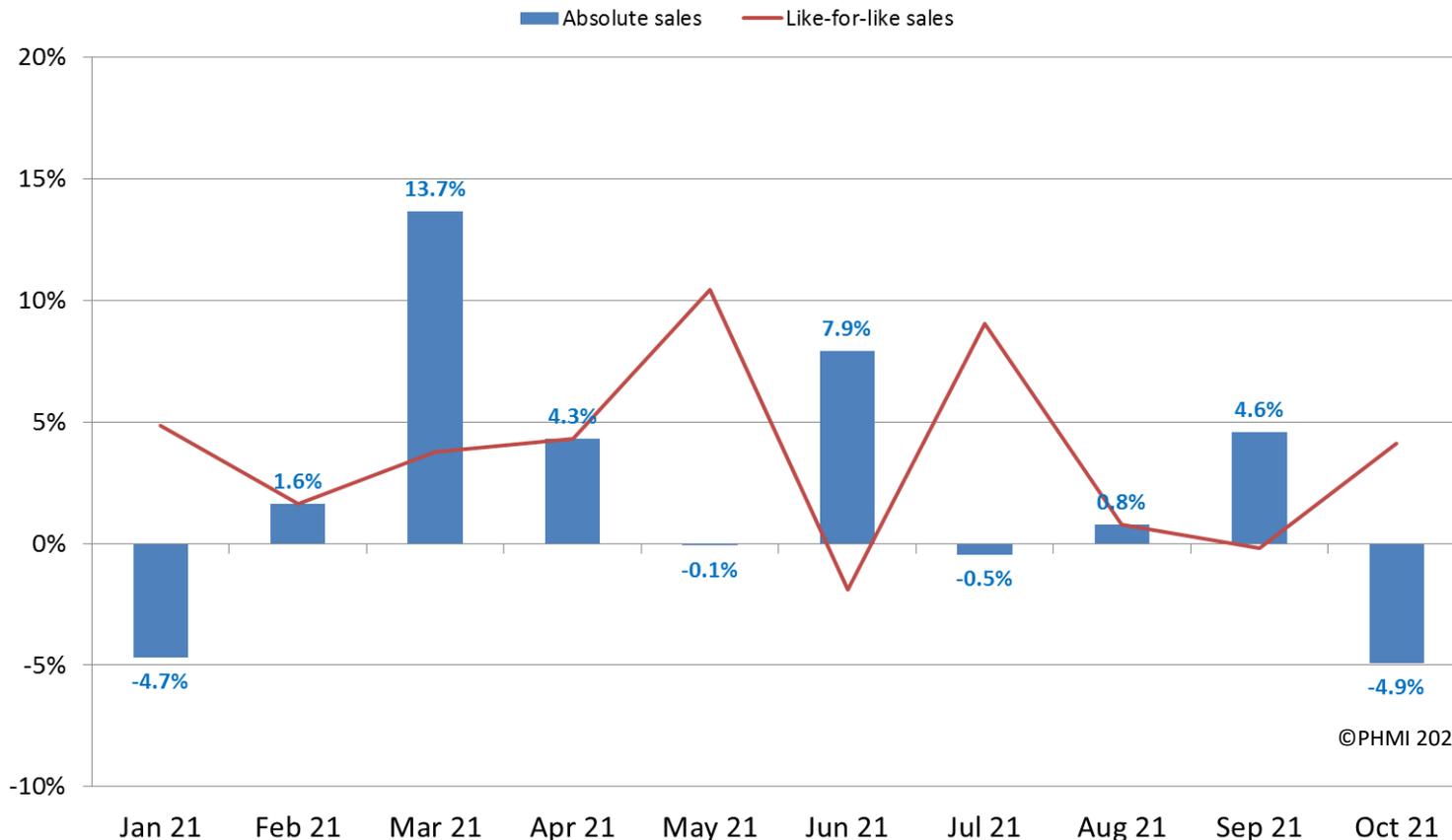
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Monthly: This Year v 2019

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

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

## Month: compared with 2019



Values shown  
for Total sales

©PHMI 2021

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

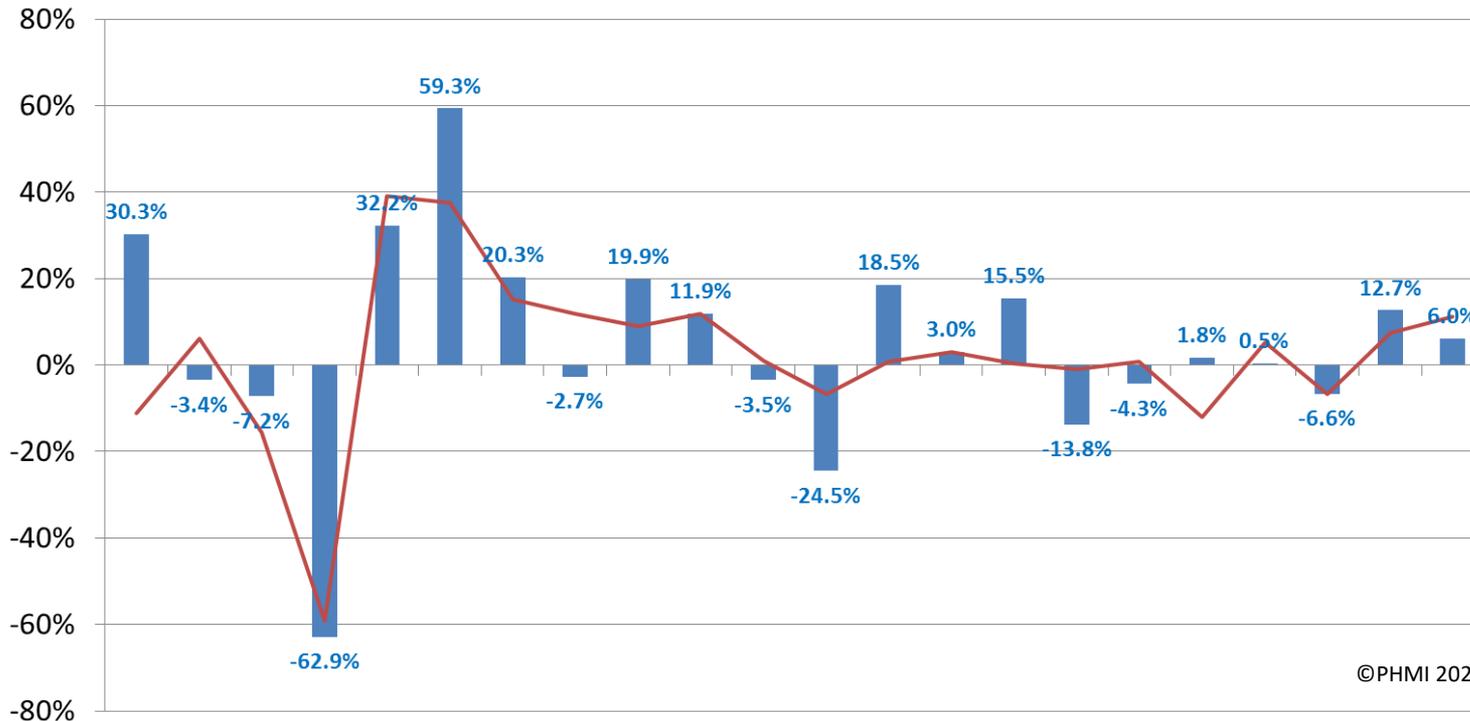
# Monthly: Month v previous month

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

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

## Month v previous month

■ Absolute sales    — Like-for-like sales



Values shown for Total sales

©PHMI 2021

Jan 20 Feb 20 Mar 20 Apr 20 May 20 Jun 20 Jul 20 Aug 20 Sep 20 Oct 20 Nov 20 Dec 20 Jan 21 Feb 21 Mar 21 Apr 21 May 21 Jun 21 Jul 21 Aug 21 Sep 21 Oct 21

\*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 Oct 2021

# Rolling 3-months: This year v last year

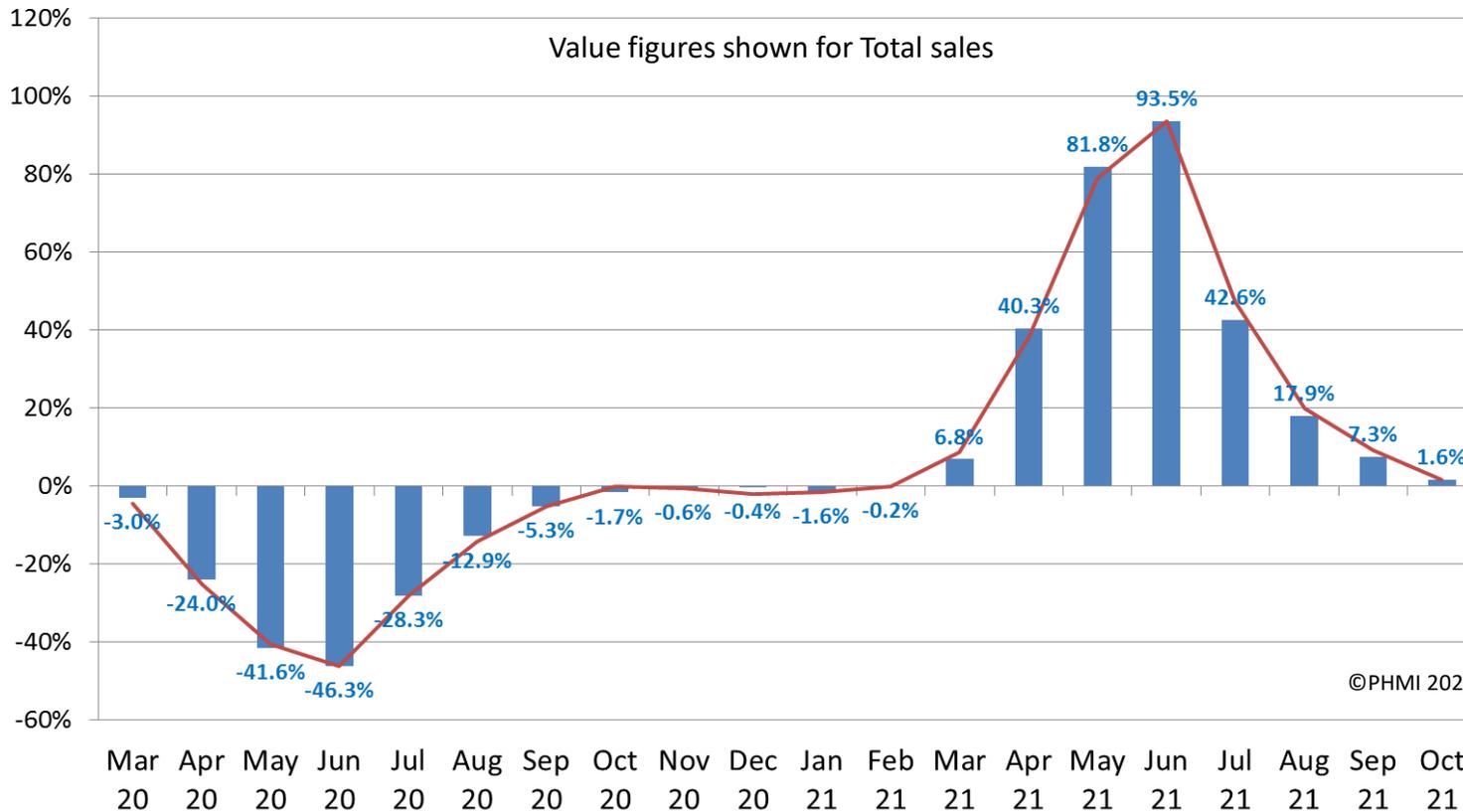
Absolute sales index and like-for-like sales index\*



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

## Rolling 3 months: year on year

Absolute sales    Like-for-like sales



Eg. October 21 shows sales in the three months August to October were 1.6% higher than the same three months last year.

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

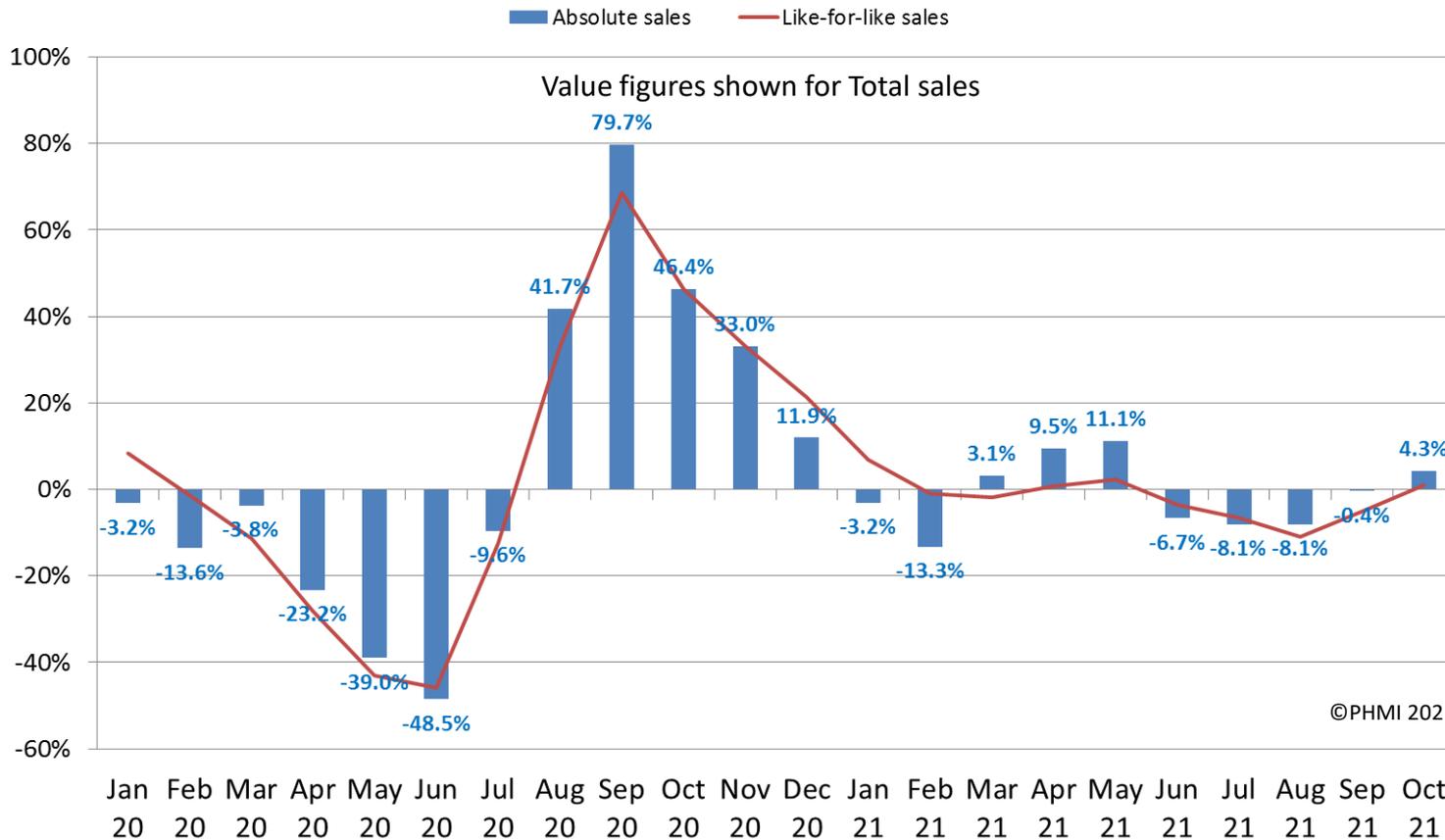
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Rolling 3-months: v previous 3 months

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

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

## Rolling 3 months v previous 3 months



Eg. October 21 shows the three months August to October were 4.3% higher than the three months May to July.

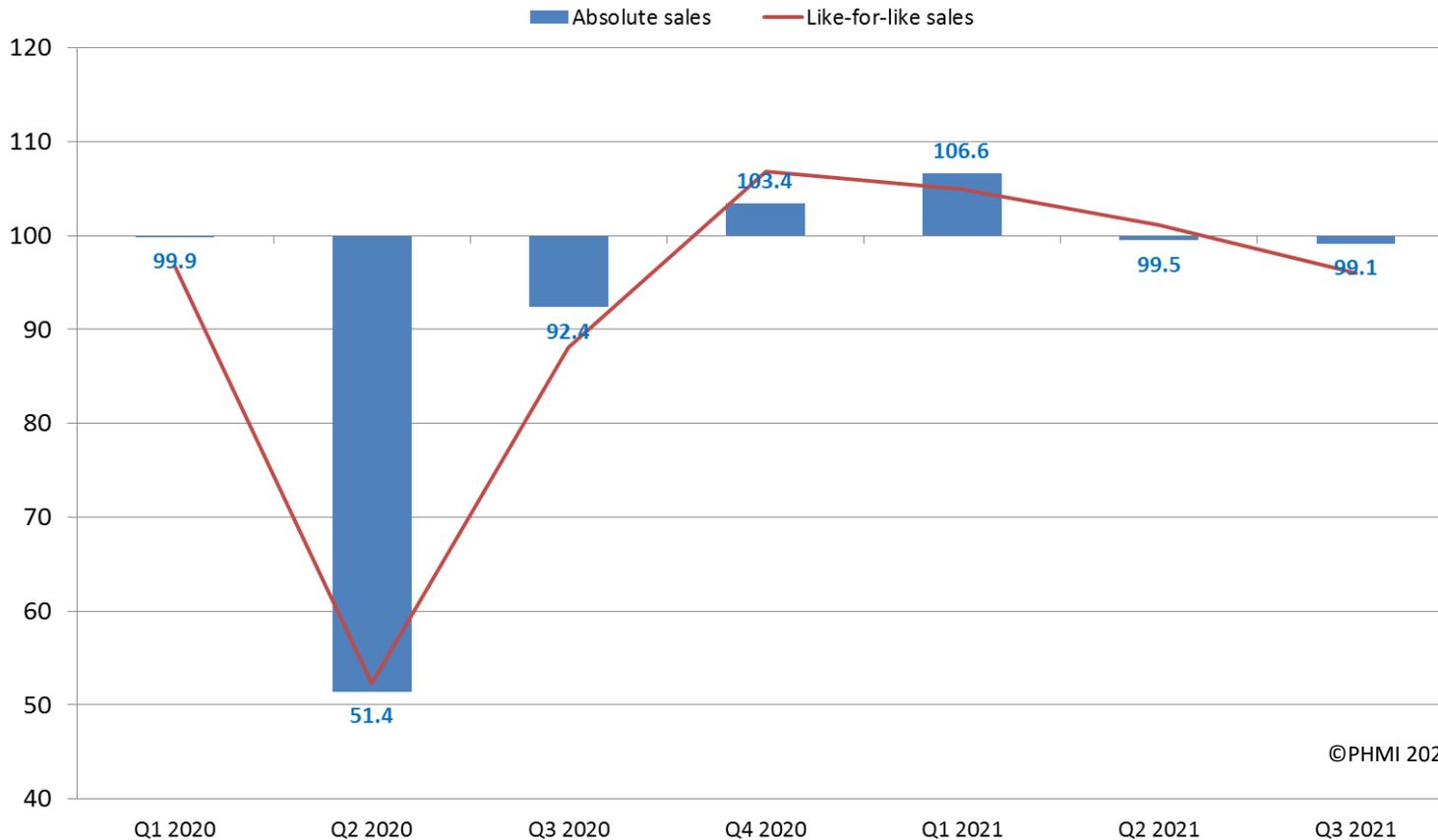
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Oct 2021

# Quarterly: Index

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

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

## Indices: Q1 2020 to Q3 2021



Value figures  
shown for Total  
sales

©PHMI 2021

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

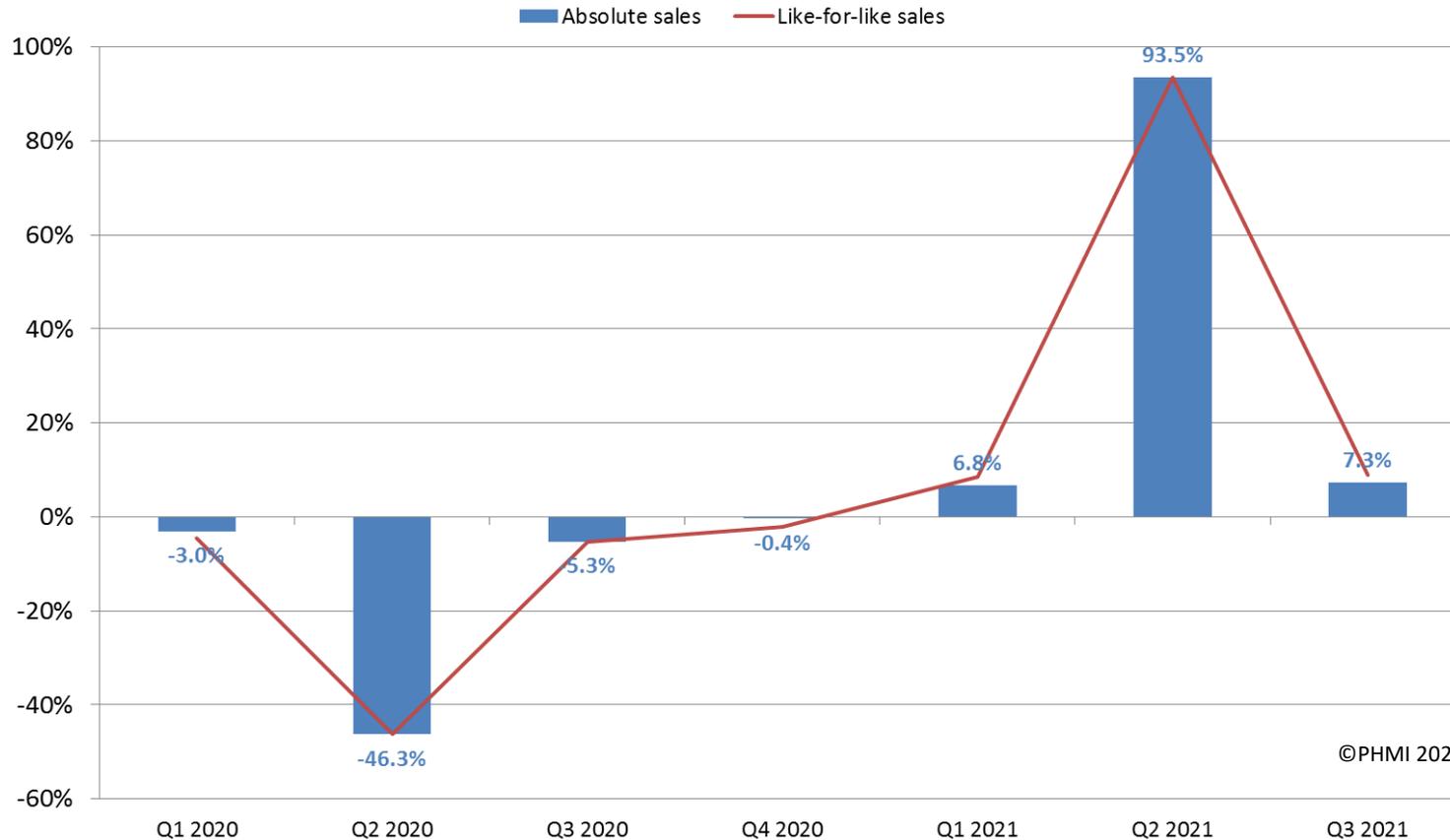
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Quarterly: Year on Year

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

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

## Quarter: year on year



Value figures  
shown for Total  
sales

©PHMI 2021

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

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

# Quarterly: Quarter v previous quarter

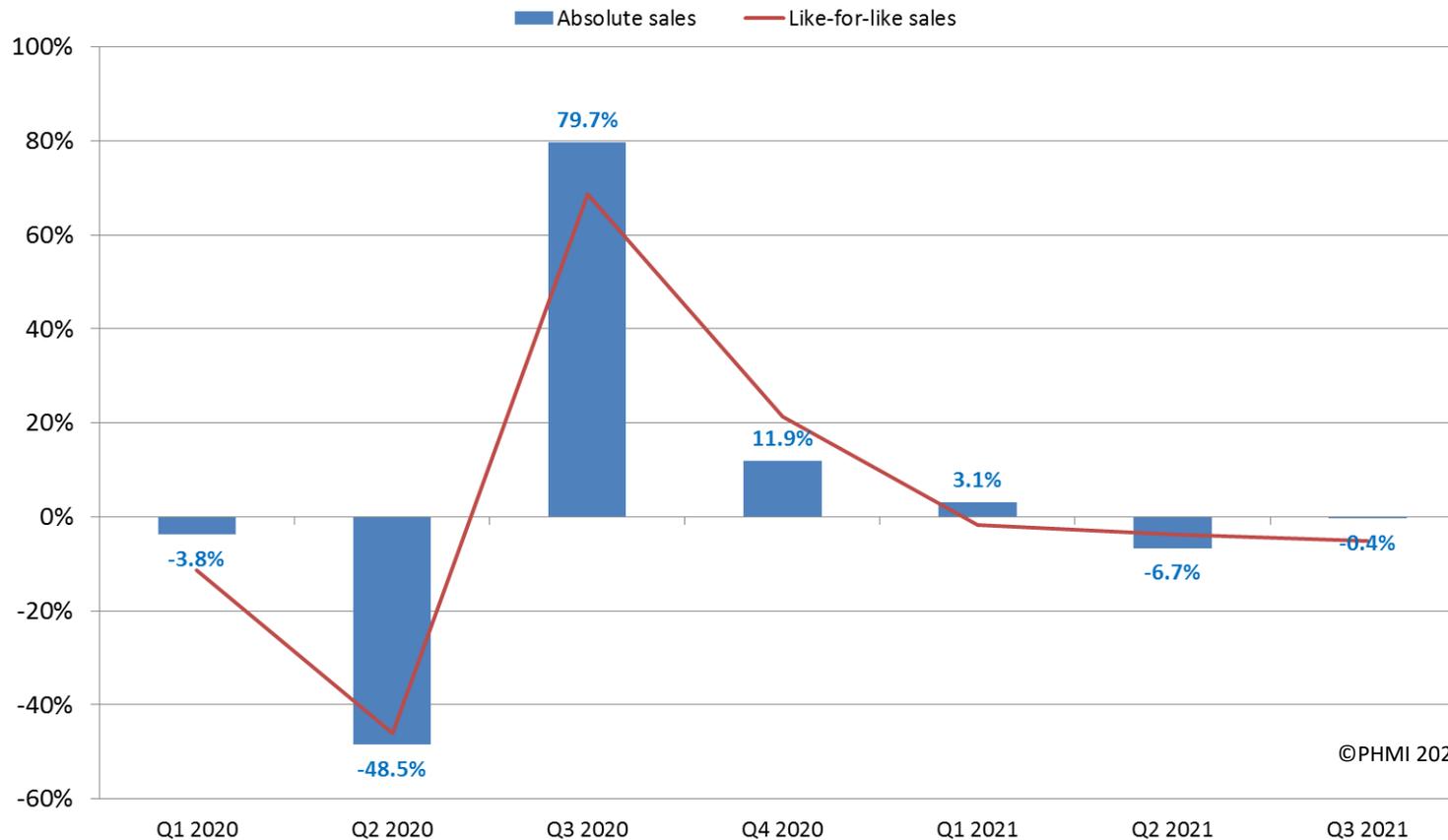
Absolute sales index and like-for-like sales index\*

Plumbing & Heating  
Merchant Index



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

## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

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

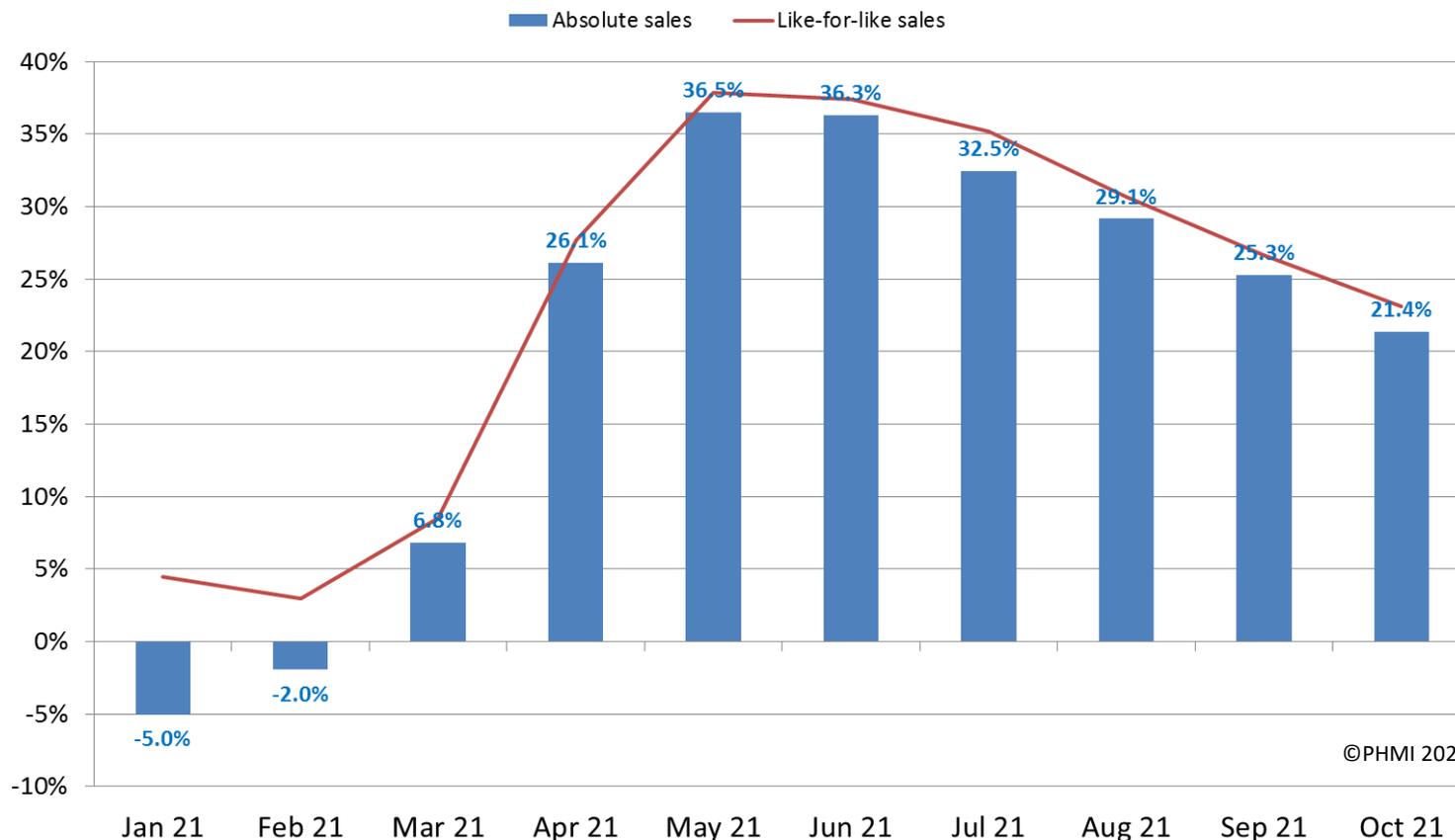
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Year To Date: Year on year

Last 10 months absolute sales index and like-for-like sales index\*

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

## Cumulative year to date: Jan 21 to Oct 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 Oct 2021

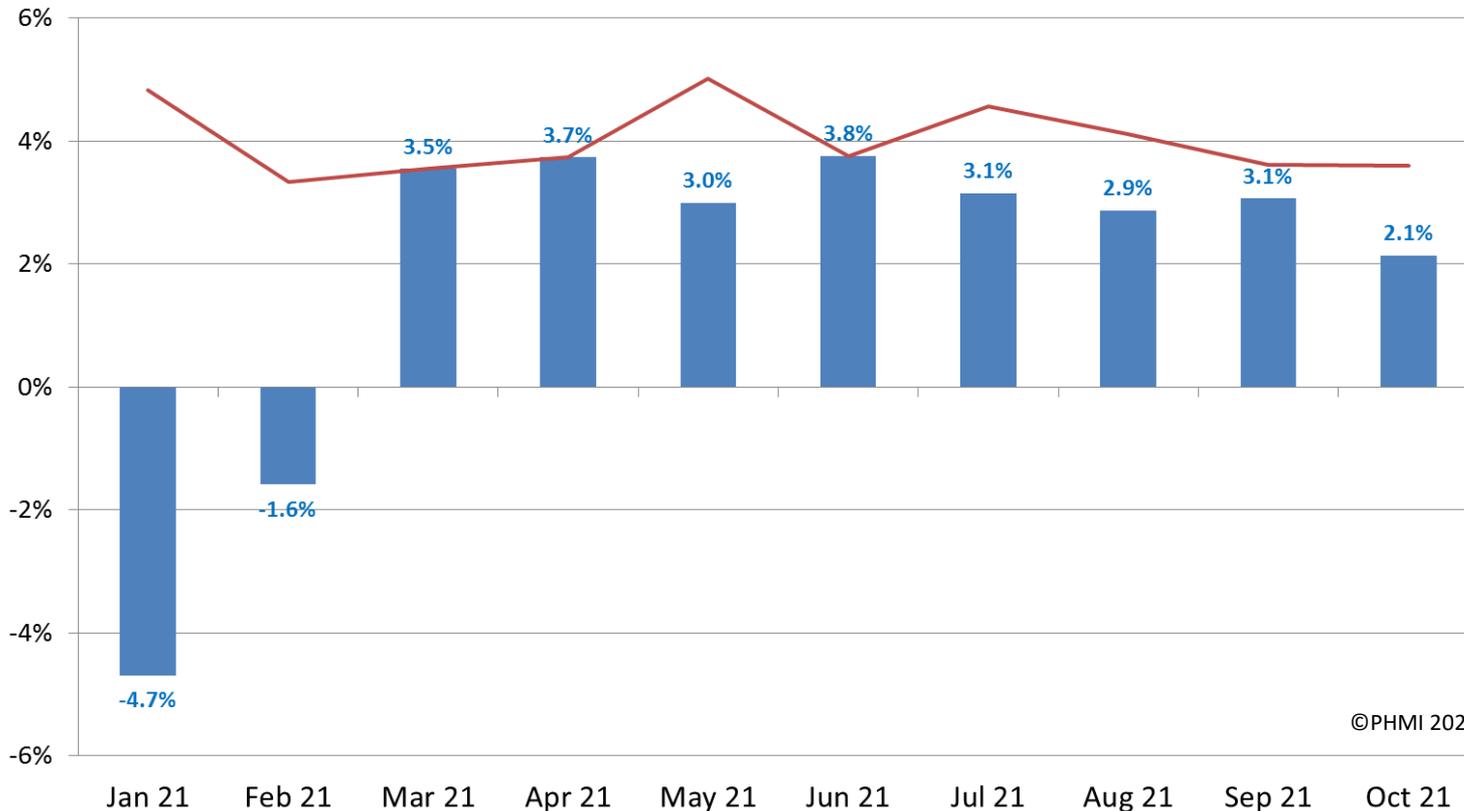
# Year To Date: 2021 v 2019

Last 10 months absolute sales index and like-for-like sales index\*

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

## Cumulative year to date: 2-year comparison

Absolute sales Like-for-like sales



Value figures shown for Total sales

©PHMI 2021

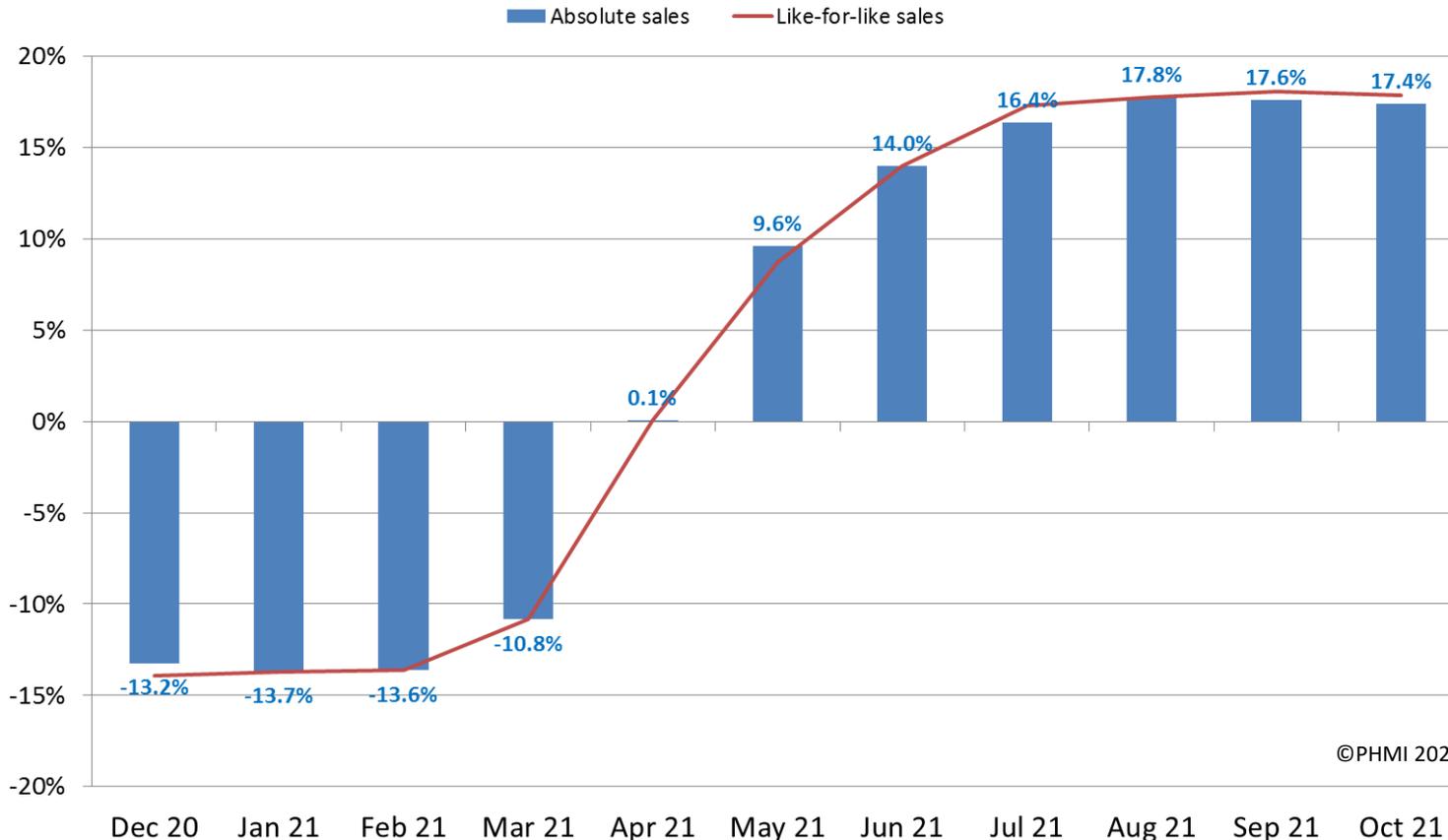
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Oct 2021

# Last 12 months: Year on year

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

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

### Rolling 12 months v previous 12 months



Value figures shown for Total sales

©PHMI 2021

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

# PHMI Trading Days

## Monthly

Index: 20.8

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

## Quarterly

Index: 62.3

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

## Half Year

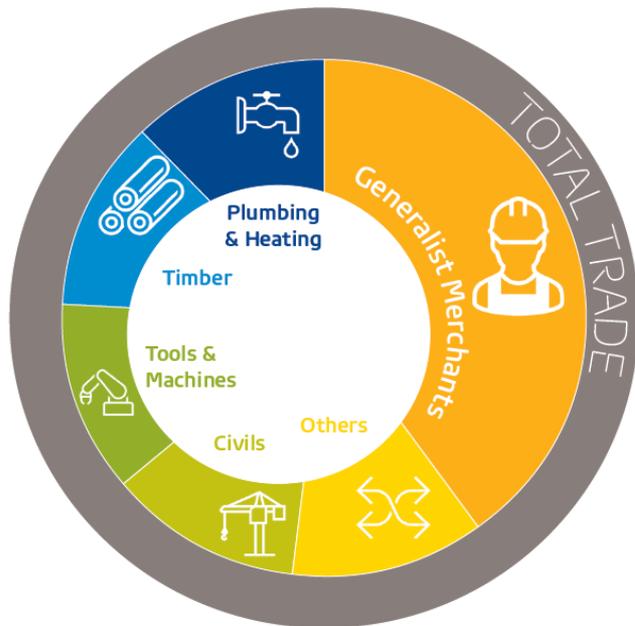
2020	
H1	H2
125	125
2021	
H1	H2
124	

## Full Year

2020
250
2021

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

# Plumbing & Heating channel definition and merchants



## Plumbing Specialists

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

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

## Plumbing Merchants

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

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

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

Merchant partners include:



Plumbing Trade Supplies



# Contacting PHMI

## PHMI Experts

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



**Toby Aiken**

Account Director

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

+44(0) 1453 521621



**Ralph Sutcliffe**

Business Development  
Director

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## 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.

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## BMF (Builders Merchant Federation) Forecast Report & BMF Sales Indicators

# BMF Forecast Report

## Autumn 2021 edition



### Builders Merchants Industry Forecast Report

The eighth edition of the BMF's Builders Merchants Industry Forecast, covering Autumn 2021 onwards, is available now.

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

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

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

The report is updated on a quarterly basis, with the Autumn 2021 edition 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 Sarup Ubhi on 024 7685 4994 or email: [sarup.ubhi@bmf.org.uk](mailto:sarup.ubhi@bmf.org.uk)

**Builders Merchants Industry Forecast**  
2021-2022

Year in Review  
Autumn Edition  
£250

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

# Contact us

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