

“building **excellence**  
in materials supply”

# Builders Merchant Building Index



## Monthly report for February 2023

(Published 21 April 2023)

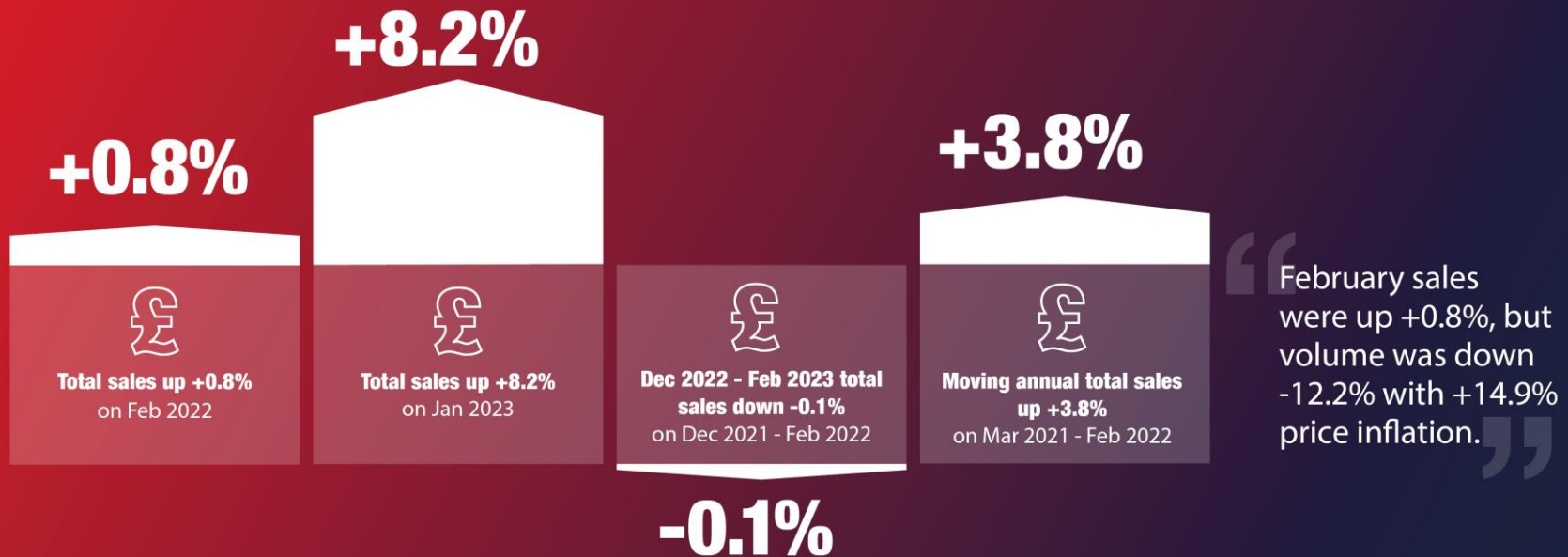
# Highlights

Total Merchants sales in March 2022 to February 2023 were +3.8% higher than in March 2021 to February 2022, with price inflation of (+16.6%), and volume (-11.0%). Full comment on page 7.

## BMBI Report February 2023 Highlights

(unadjusted for trading days)

[www.bmbi.co.uk](http://www.bmbi.co.uk)



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# Introduction:

## Builders Merchant Building Index



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

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

### Executive Summary

Short of time and just want to read the headlines? Download an Executive Summary that provides a snapshot of value sales and trends from Britain's Builders' Merchants for February 2023 [here](#).

### BMBI Expert Panel

MRA Research produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands. **Meet the Experts and read their comments on pages 5 and 6 of this report or read their previous comments [here](#).**

### Recognition for BMBI

One of the aims of BMBI is to reach across and beyond construction. It's now syndicated to a growing number of trade magazines in different sectors on a regular basis. Outside the industry, economists, banks, consultancies, investment bodies and the big accountants regularly refer to it and BMBI is referenced alongside the Office for National Statistics (ONS) data in the Government **Department for Business & Trade** monthly construction update. **Download the latest update [here](#).**



### More data available

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

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

# The Expert Panel

## Speaking for their markets - 1

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

The Q4 2022 report, which includes commentary from our experts is available [here](#)

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

### Expert for Drylining Systems:



**Gordon Parnell**  
Sales Director British  
Gypsum

[Read latest comment: Q4 2022 Report](#)

### Expert for Bricks & Roof Tiles:



**Kevin Tolson**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q4 2022 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q4 2022 Report](#)

### Expert for Fasteners and Fixings:



**Ian Doherty**  
Chief Executive  
Owlett-Jaton

[Read latest Comment: Q4 2022 Report](#)

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q4 2022 Report](#)

### Expert for Wood-Based Panels:



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

[Read latest Comment: Q4 2022 Report](#)

# The Expert Panel

## Speaking for their markets - 2

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



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

[Read latest Comment: Q4 2022 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q4 2022 Report](#)

### Expert for Adhesives & Sealants:



**Mathew Whitehouse**  
Marketing Director  
Bostik UK

[Read latest Comment: Q4 2022 Report](#)

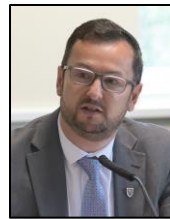
### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q4 2022 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q4 2022 Report](#)

### Expert for Paint:



**Paul Edworthy**  
Commercial Lead  
Dulux Trade

[Read latest Comment: Q4 2022 Report](#)

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



**Andy Scothern**  
Director of Business Development  
eCommerce

[Read latest Comment: Q4 2022 Report](#)

## February sales up + 0.8% year-on-year, with volume down -12.2% and price up +14.9%

Total Builders Merchants value sales were up +0.8% in February 2023 compared with the same month last year. Volume sales were -12.2% lower with price up +14.9%. There was no difference in trading days. Nine of the twelve categories sold more, including Renewables & Water Saving (+58.9%), Decorating (+15.0%), Plumbing, Heating & Electrical (+13.3%), Workwear & Safetywear (+10.1%) and Ironmongery (+8.5%). Services (-2.1%), Landscaping (-12.5%) and Timber & Joinery Products (-13.9%) sold less.

### February 2023 v January 2023

Total Merchants sales were +8.2% higher in February 2023 than in January 2023. Volume sales were +13.4% higher with price down -4.6%. With one less trading day this month, like-for-like sales (which take trading day differences into account) were +13.6% higher. Landscaping (+27.6%) was up the most, followed by Heavy Building Materials (+10.9%). Workwear and Safetywear (-6.5%) was weakest.

### February Index:

February's overall BMBI index was 135.5, helped by Plumbing, Heating & Electrical (156.8). With one less trading day, the like-for-like index was 140.6. All categories exceeded 100, with Kitchens & Bathrooms (143.3), Timber & Joinery Products (139.4) and Ironmongery (135.9) ahead the most. Tools (106.7) was weakest.

### Last three months, year on year

Total sales in December 2022 to February 2023 were -0.1% lower than in December 2021 to February 2022, with price inflation of +17.9%, and volume down -15.3%. There was no difference in trading days. Nine of the twelve categories sold more. Renewables & Water Saving (+49.7%), Plumbing, Heating & Electrical (+16.4%) and Decorating (+16.1%) did best. Timber & Joinery Products (-14.5%) was weakest.

### Last three months v previous three months

Total sales in December 2022 to February 2023 were -20.9% lower than in September to November 2022, with volume down -27.3% and +8.7% price inflation. With seven less trading days this period, like-for-like sales were -11.2% lower. All categories sold less. Heavy Building Materials (-21.4%), Timber & Joinery Products (-24.2%) and seasonal category Landscaping (-31.4%) declined the most.

### MAT

Total Merchants sales in March 2022 to February 2023 were +3.8% higher than in March 2021 to February 2022, with price inflation of +16.6%, and volume -11.0%. With two less trading days in the most recent period, like-for-like sales were +4.7% higher. Ten of the twelve categories sold more. Renewables & Water Saving (+35.0%) did best. Kitchens & Bathrooms (+16.1%), Plumbing, Heating & Electrical (+14.6%), Workwear & Safetywear (+13.8%), Decorating (+11.5%) and Heavy Building Materials (+9.5%) did better than merchants overall. Landscaping (-5.1%) and Timber & Joinery Products (-7.6%) sold less.

Total sales in the three months December 2022 to February 2023 were -0.1% lower than in December 2021 to February 2022, with price inflation of +17.9%, and volume down -15.3%.

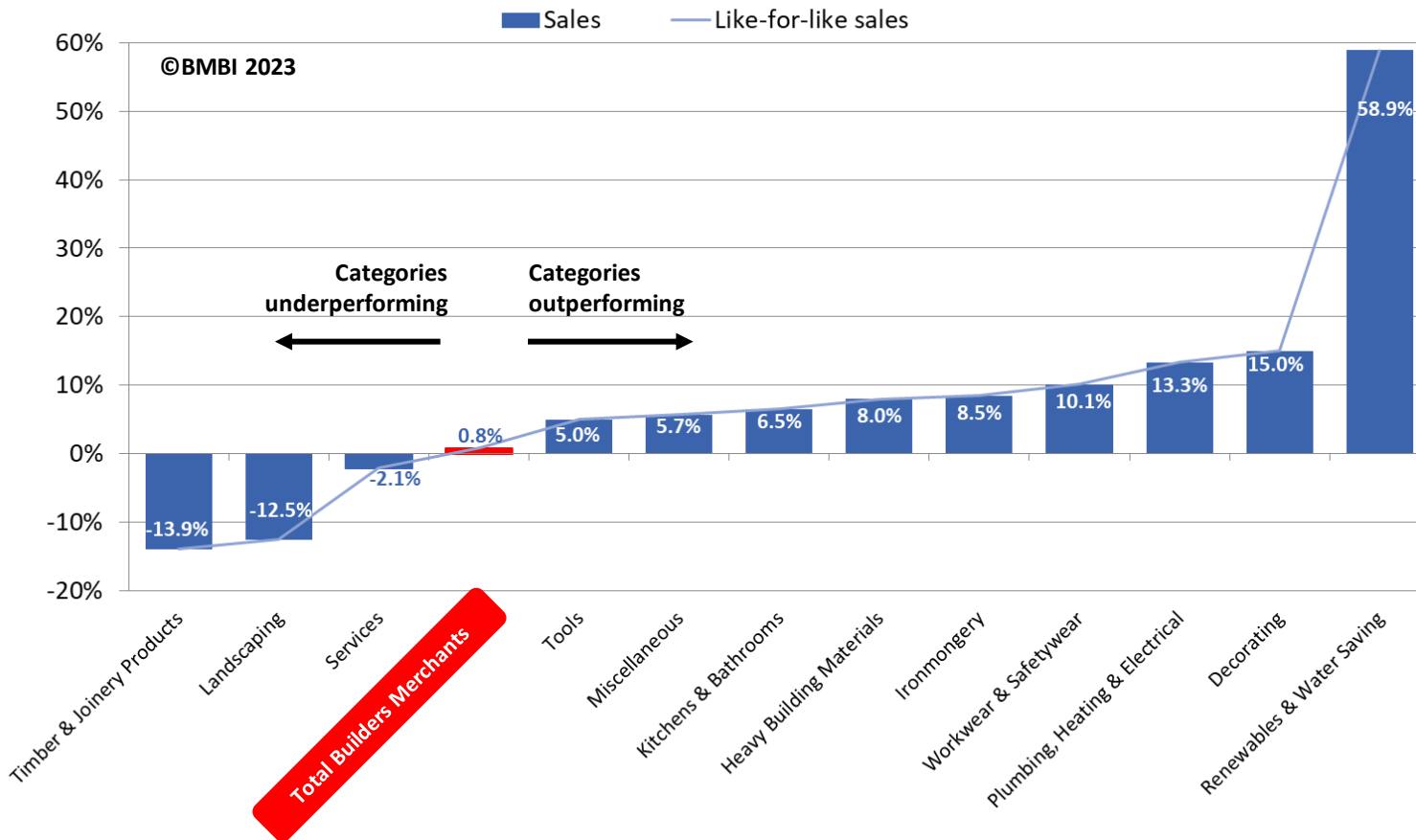
# Monthly: This year v last year

## February 2023 sales

There was no difference in trading days. Like-for-like sales take trading day differences into account.



### February 2023 v February 2022



Source: GfK's Builders Merchants Total Category Report July 2015 to February 2023

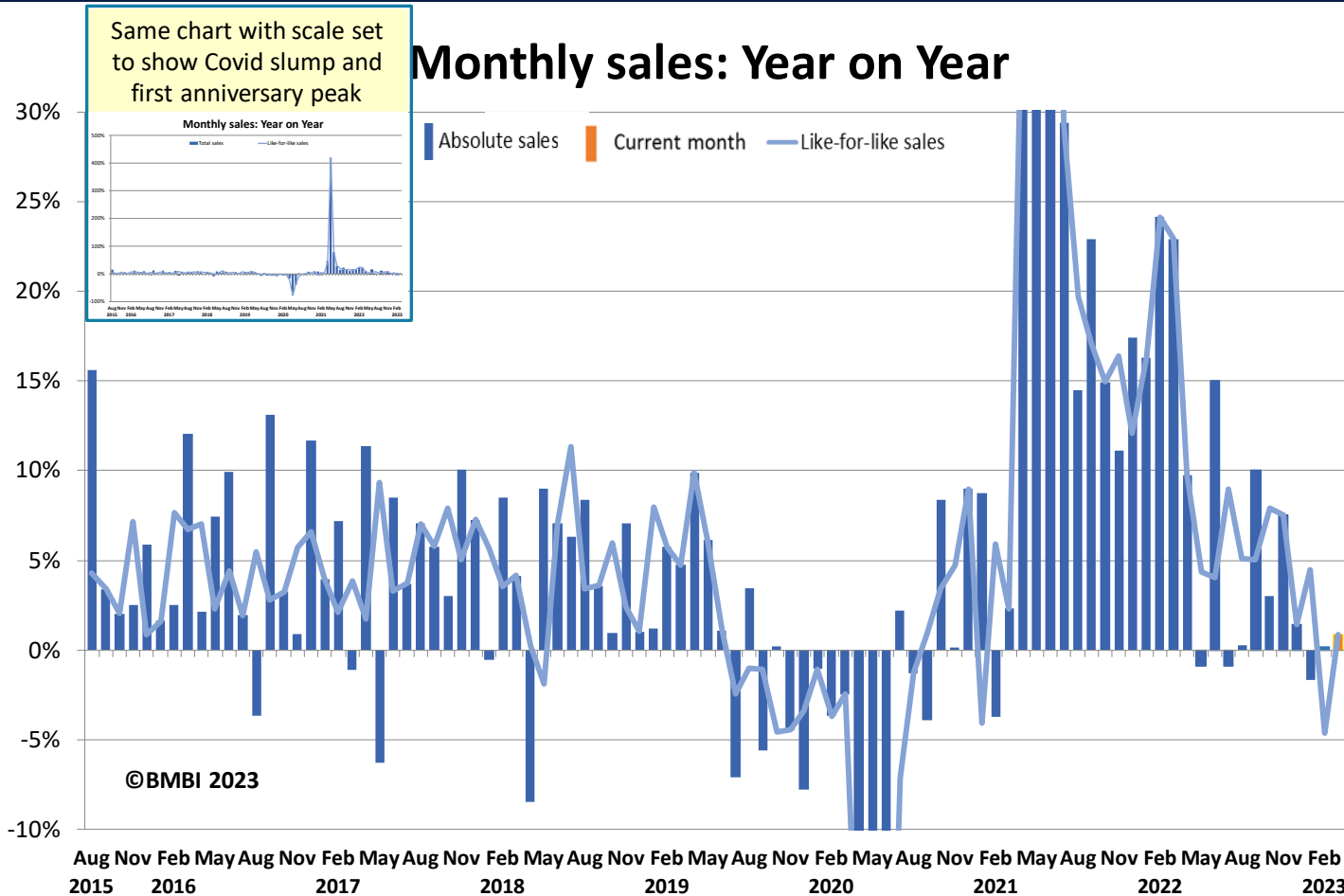
Total Builders Merchants value sales were up +0.8%.  
Nine of the twelve categories sold more.



# Monthly: Year on Year

## Sales and Like-for-like sales

There was no difference in trading days. Like-for-like sales take trading day differences into account.



Note: Year-on-year sales slumped to -73.6% in April 2020.  
Year-on-year sales peaked at 419.2% in April 2021.

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

Sales growth in February was up +0.8% compared to the same month last year.

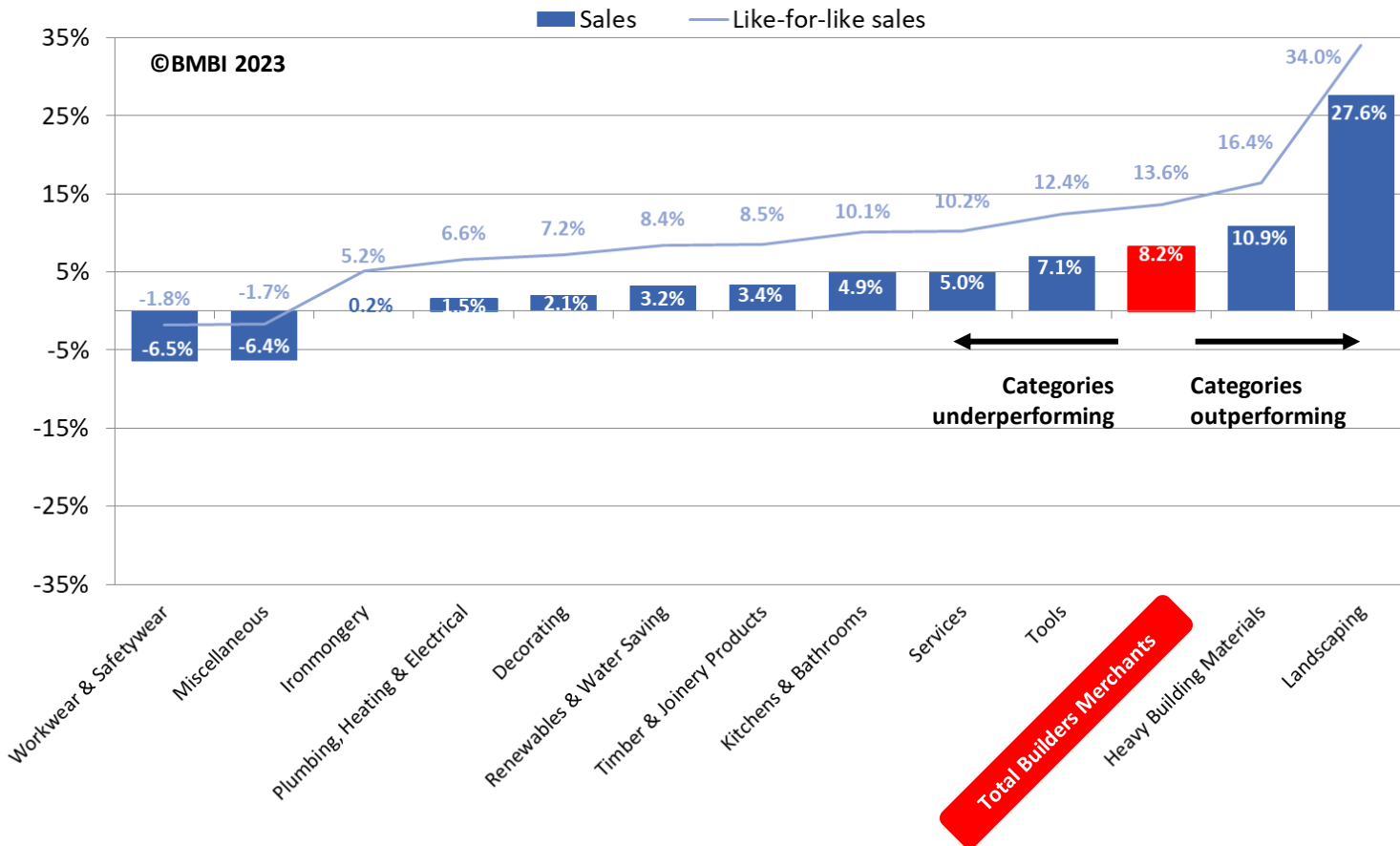
# Monthly: This month v last month

## February 2023 sales

20 trading days this month v 21 trading days last month. Like-for-like sales take trading day differences into account.



### February 2023 v January 2023



Source: GfK's Builders Merchants Total Category Report July 2015 to February 2023

Total February 2023 sales were +8.2% higher than in January 2023.

Landscaping (+27.6%) grew most followed by Heavy Building Materials (+10.9%).

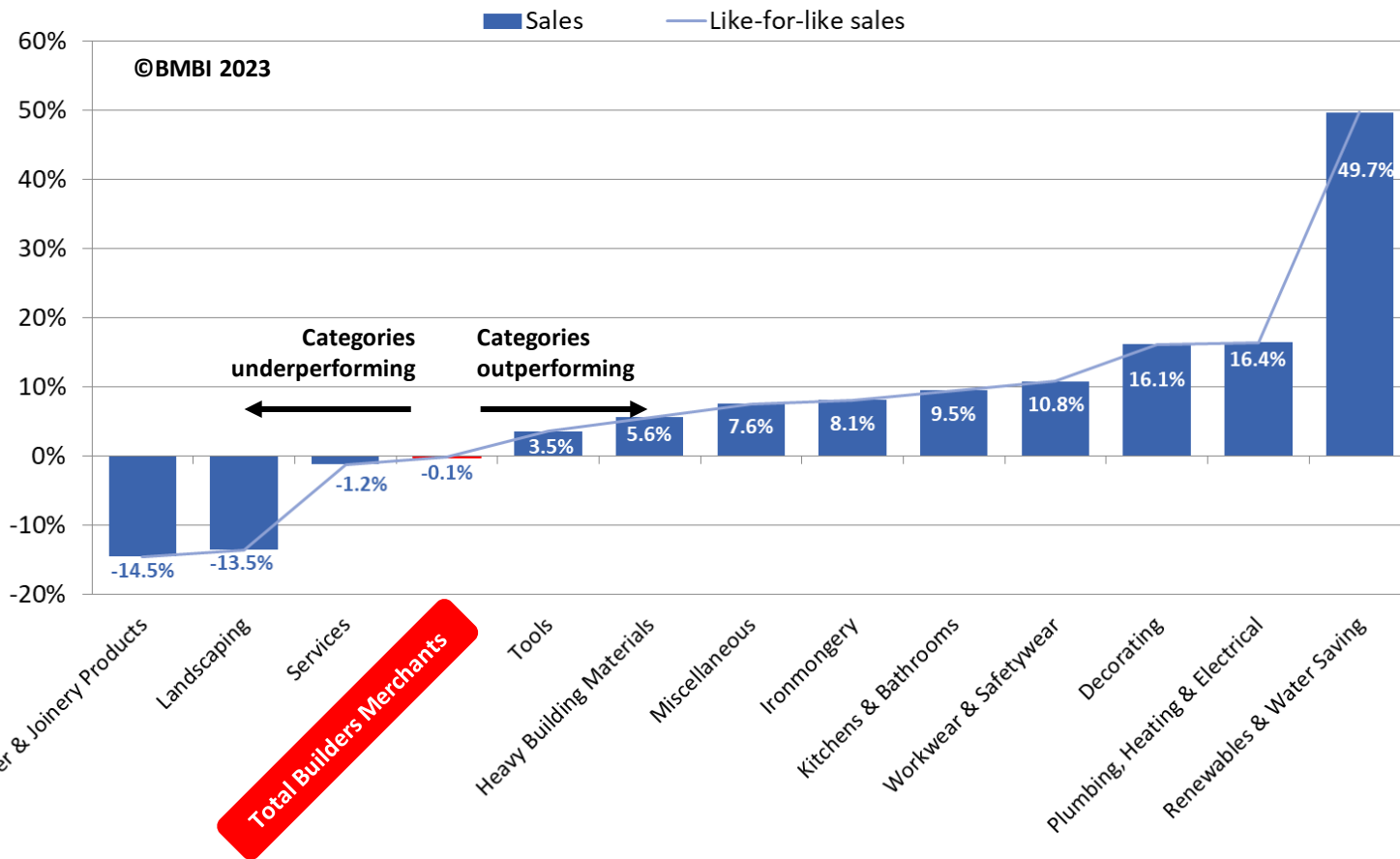
# Latest 3 months: v last year

## December 2022 to February 2023 sales

There was no difference in trading days. Like-for-like sales take trading day differences into account.

### 3 months Dec 22 to Feb 23 v 3 months Dec 21 to Feb 22

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023



Sales in the last three months were -0.1% lower than in the same period last year.

Renewables & Water Saving (+49.7%) grew fastest.

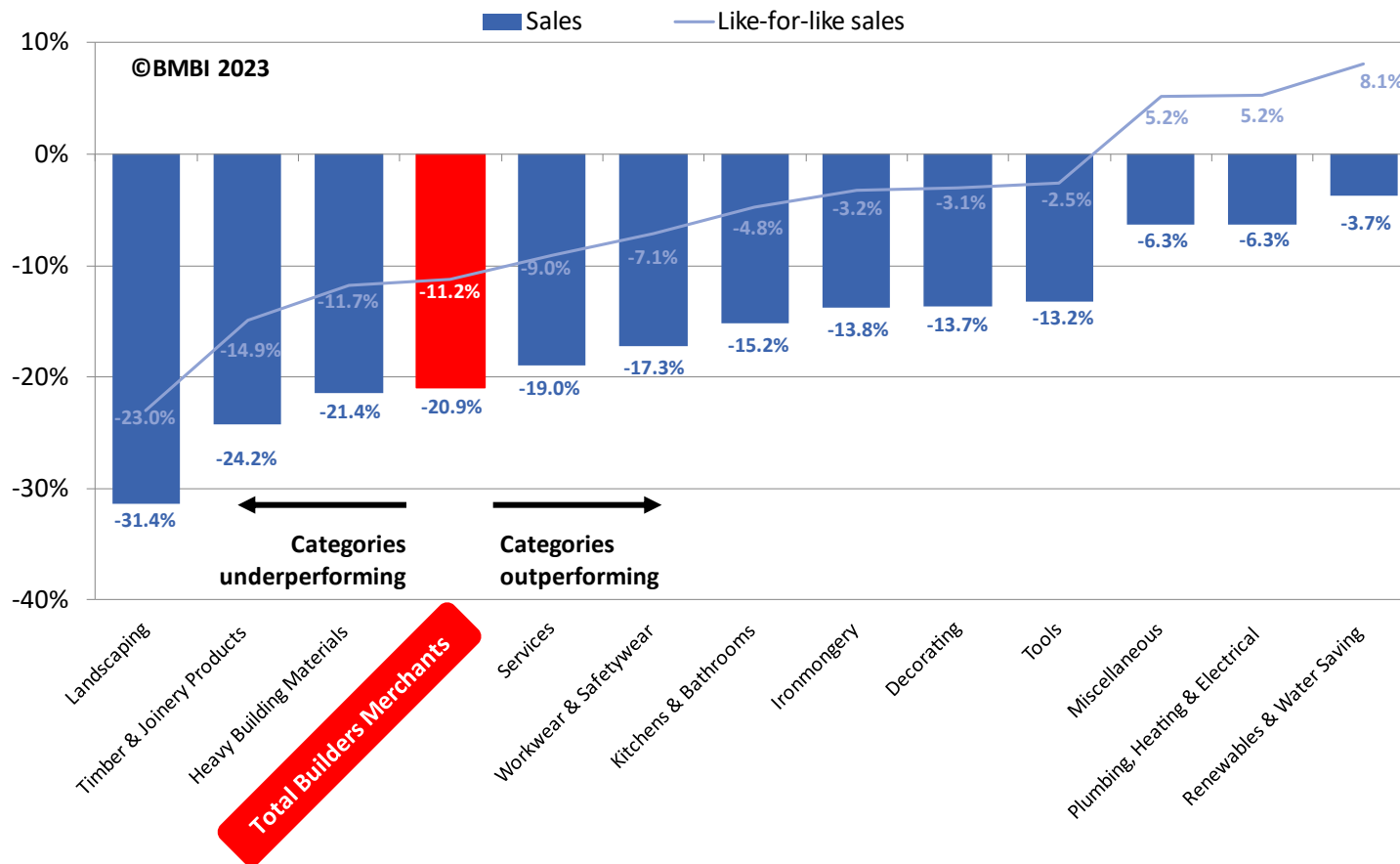
# Latest 3 months: v previous 3 months

## December 2022 to February 2023 sales

57 trading days in the latest three months v 64 trading days in the previous three months. Like-for-like sales take trading day differences into account.



### 3 months Dec 22 to Feb 23 v 3 months Sep 22 to Nov 22



Source: GfK's Builders Merchants Total Category Report July 2015 to February 2023

Total sales in the last three months were -20.9% lower than in the previous three months.

All categories sold less.

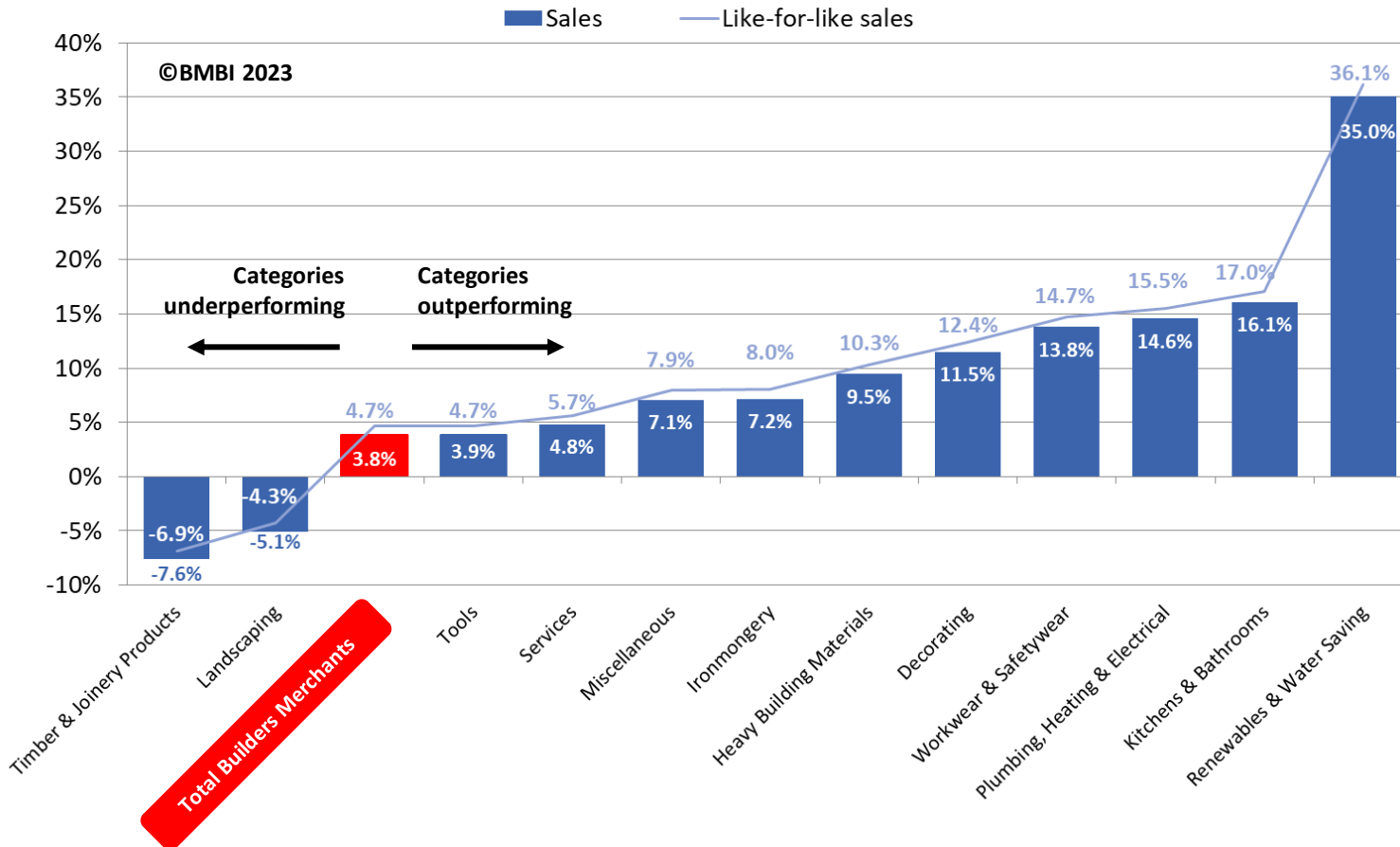
# Last 12 Months: Year on Year

## Sales and like-for-like sales

247 trading days this year v 249 trading days last year. Like-for-like sales take trading day differences into account.



### 12 months Mar 22 to Feb 23 v 12 months Mar 21 to Feb 22



Source: GfK's Builders Merchants Total Category Report July 2015 to February 2023

Sales in the twelve months to February 2023 were +3.8%.

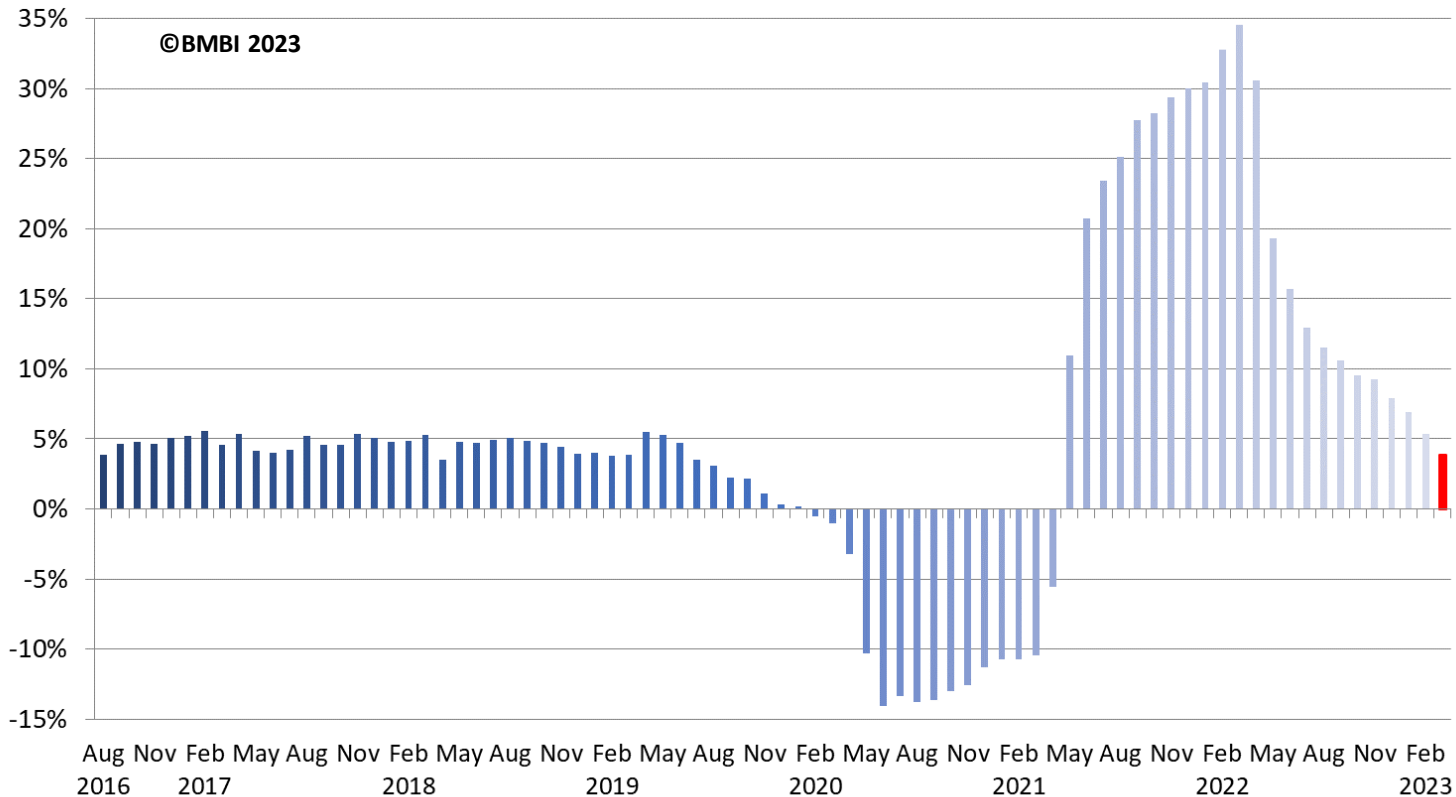
Ten of the twelve categories sold more led by Renewables & Water Saving (+35.0%).

# 12 months: Year on Year

MAT sales



## MAT: Total Builders Merchants August 2016 to February 2023



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

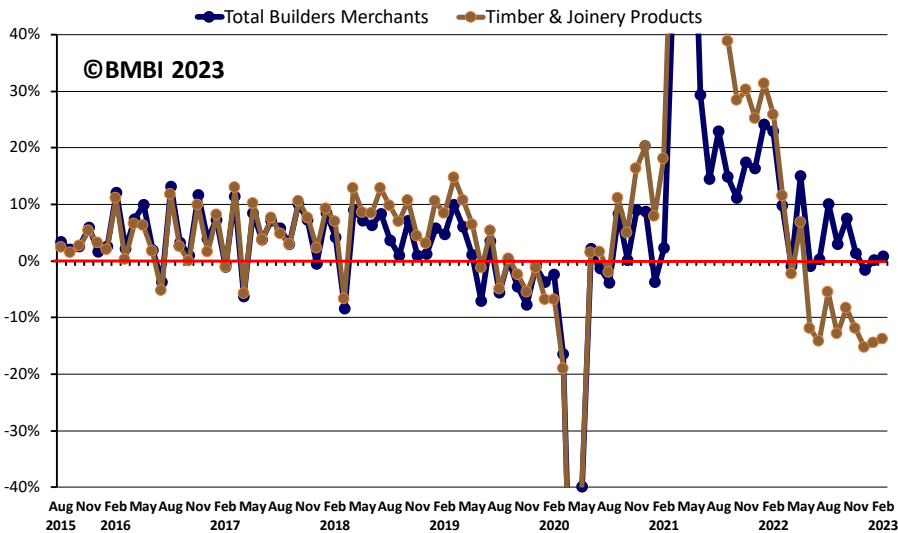
Sales in the past 12 months March 2022 to February 2023 were +3.8% higher than in March 2021 to February 2022, although the rate of growth continued to reduce.

# Monthly Year-on-year

February 2023



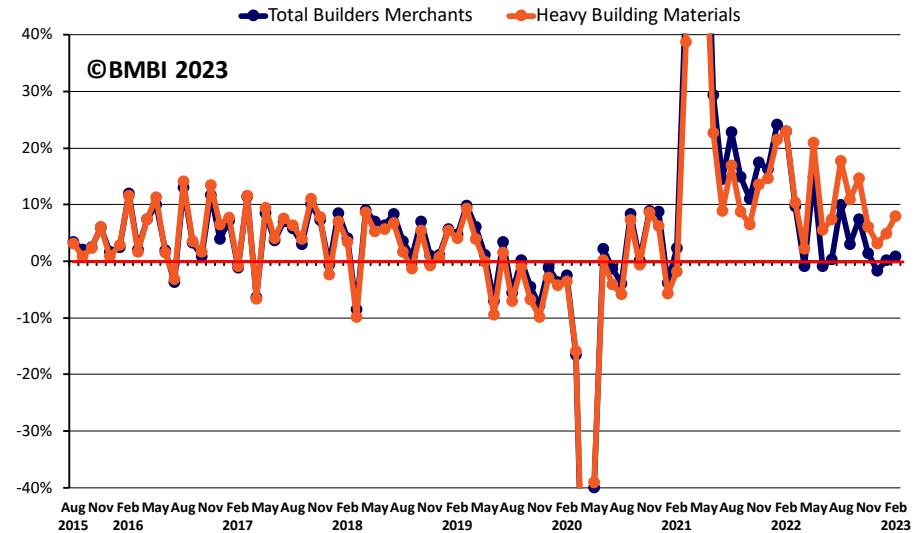
## Timber & Joinery Products - Monthly



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

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

## Heavy Building Materials - Monthly



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

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

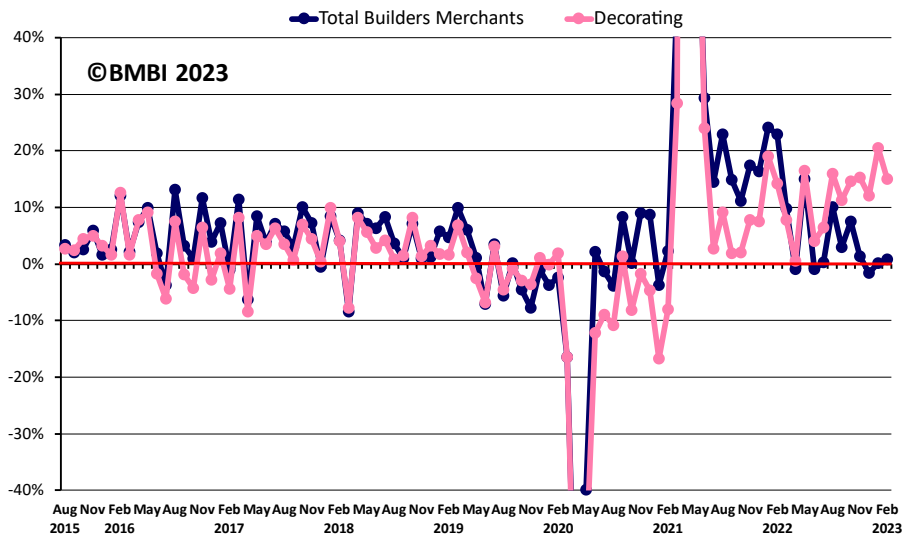
GfK Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

# Monthly Year-on-year

February 2023



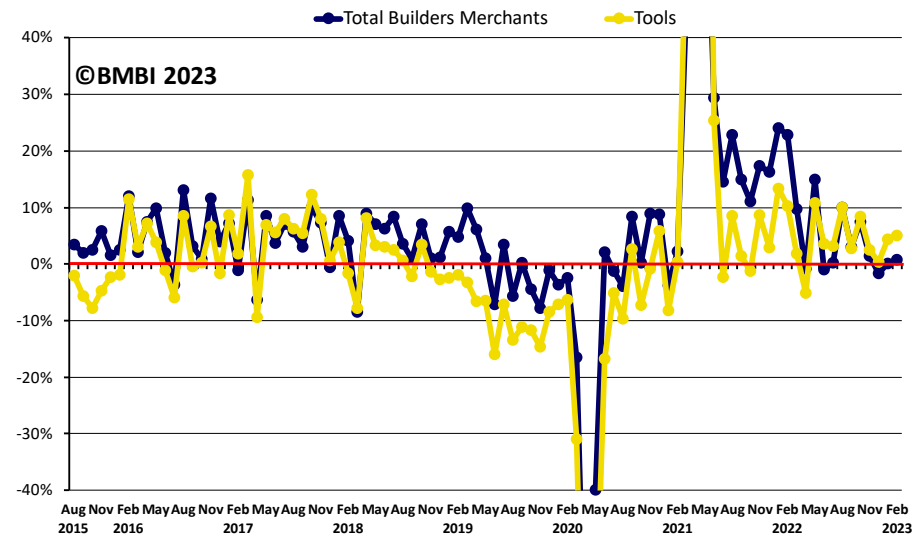
## Decorating - Monthly



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

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

## Tools - Monthly



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

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

GfK Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

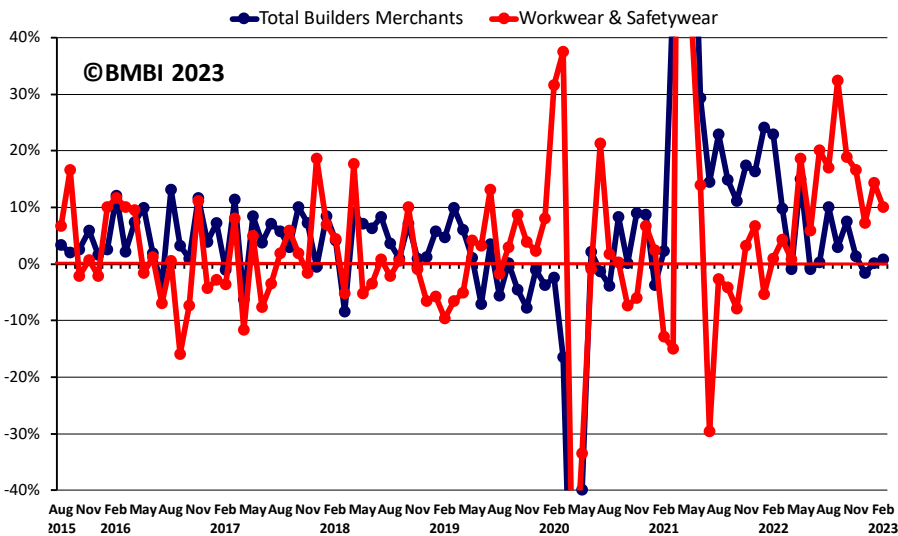


# Monthly Year-on-year

February 2023



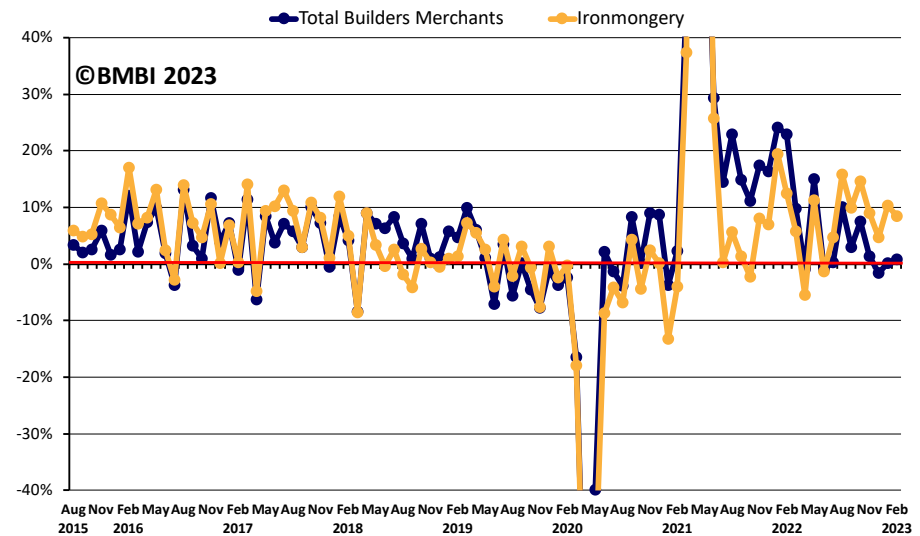
## Workwear & Safetywear - Monthly



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

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

## Ironmongery - Monthly



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

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

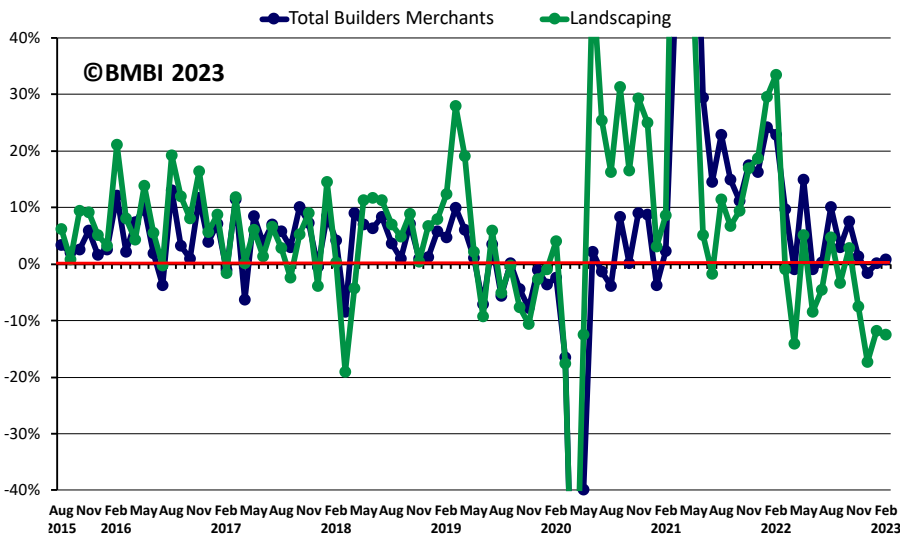
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

# Monthly Year-on-year

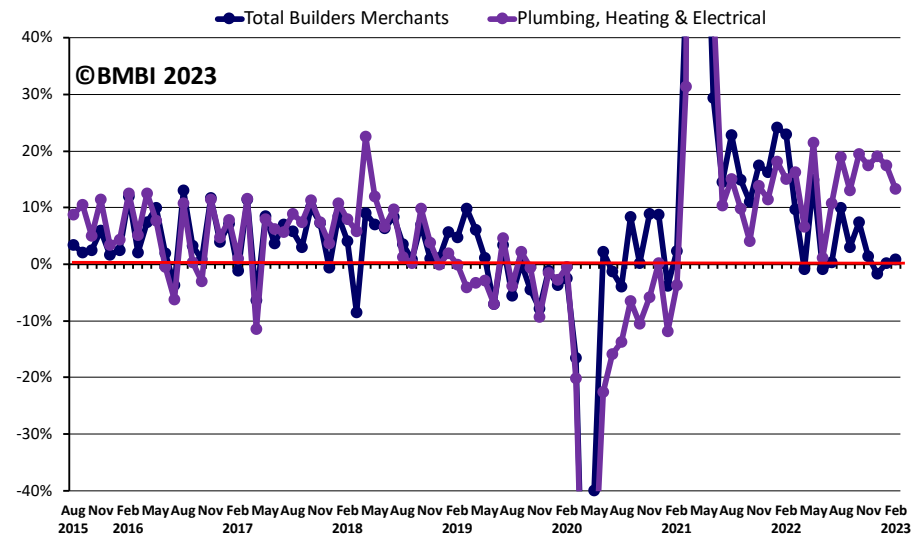
February 2023



## Landscaping - Monthly



## Plumbing Heating & Electrical - Monthly



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

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

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

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

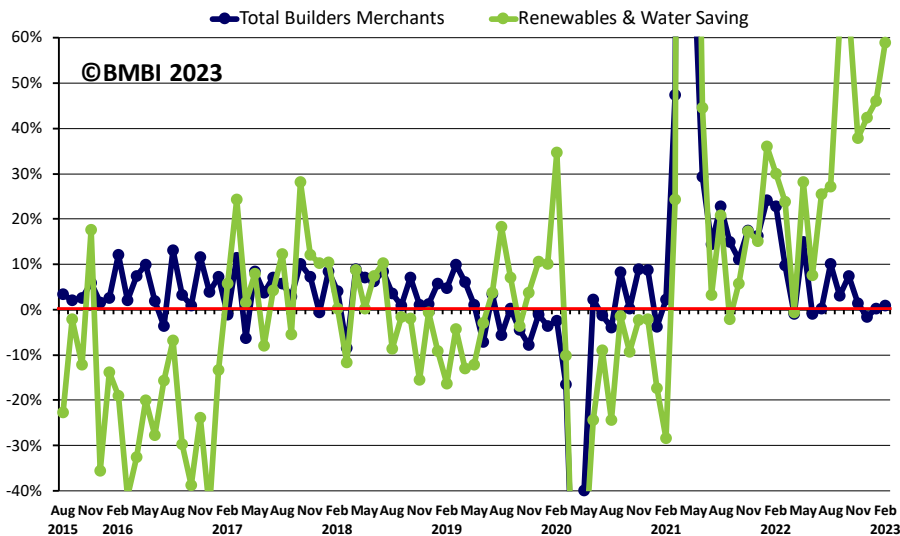
GfK Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

# Monthly Year-on-year

February 2023



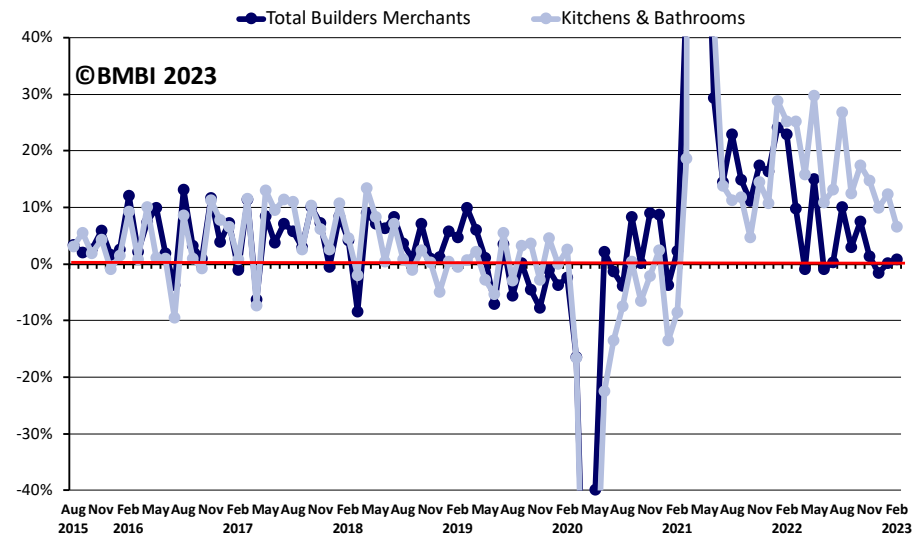
## Renewables & Water Saving - Monthly



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

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

## Kitchens & Bathrooms - Monthly



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

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

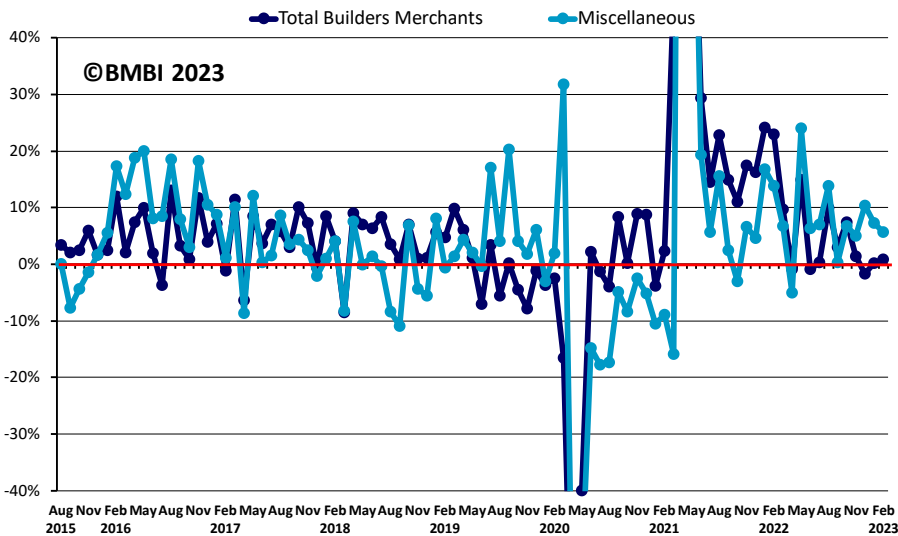
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

# Monthly Year-on-year

February 2023



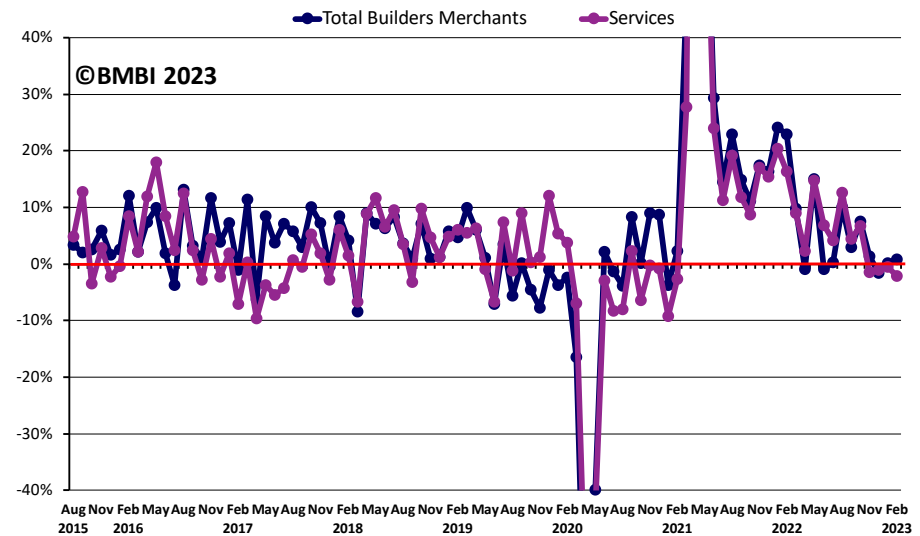
## Miscellaneous - Monthly



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

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

## Services - Monthly



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

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

GfK Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

# Monthly: Index and Categories

February 2022\* – February 2023

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



		2022											2023	
MONTHLY SALES VALUE INDEX	Index	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
<b>Total Builders Merchants</b>	<b>100</b>	<b>134.4</b>	<b>166.8</b>	<b>149.3</b>	<b>162.4</b>	<b>155.6</b>	<b>151.5</b>	<b>153.1</b>	<b>152.4</b>	<b>151.0</b>	<b>147.1</b>	<b>95.5</b>	<b>125.2</b>	<b>135.5</b>
Timber & Joinery Products	100	161.8	195.6	172.3	185.0	175.2	171.0	172.2	168.5	165.9	160.4	100.7	134.9	139.4
Heavy Building Materials	100	125.4	156.2	140.4	155.1	150.8	147.0	149.4	151.3	150.1	144.0	92.4	122.2	135.5
Decorating	100	109.3	131.2	114.0	124.2	122.0	122.1	126.2	127.8	130.6	137.4	92.0	123.7	126.3
Tools	100	101.9	124.2	104.6	109.9	103.7	100.3	102.7	102.9	108.2	111.3	73.2	99.7	106.7
Workwear & Safetywear	100	112.4	123.3	104.9	113.7	118.5	111.5	112.0	141.0	137.3	152.6	100.5	132.3	123.7
Ironmongery	100	125.5	151.5	130.1	141.3	135.2	135.3	139.2	141.9	142.6	144.7	98.3	135.7	135.9
Landscaping	100	149.5	220.0	220.8	231.7	215.1	195.5	183.5	166.1	152.6	132.7	76.5	102.4	130.7
Plumbing, Heating & Electrical	100	138.3	159.4	127.1	137.3	125.1	125.9	130.5	143.3	156.6	168.4	127.6	154.4	156.8
Renewables & Water Saving	100	80.9	106.8	78.6	93.3	86.3	90.4	89.9	115.3	118.1	113.8	82.6	123.5	127.5
Kitchens & Bathrooms	100	134.5	151.1	131.5	144.6	138.7	143.1	150.1	147.5	146.7	161.4	106.4	136.6	143.3
Miscellaneous	100	122.4	141.7	119.9	137.9	127.1	130.6	132.4	128.6	125.0	133.3	99.4	134.5	125.9
Services	100	120.1	146.6	131.7	141.8	140.5	138.4	146.6	139.4	136.3	133.2	101.6	112.0	117.6

\*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 2023

# Monthly: Index

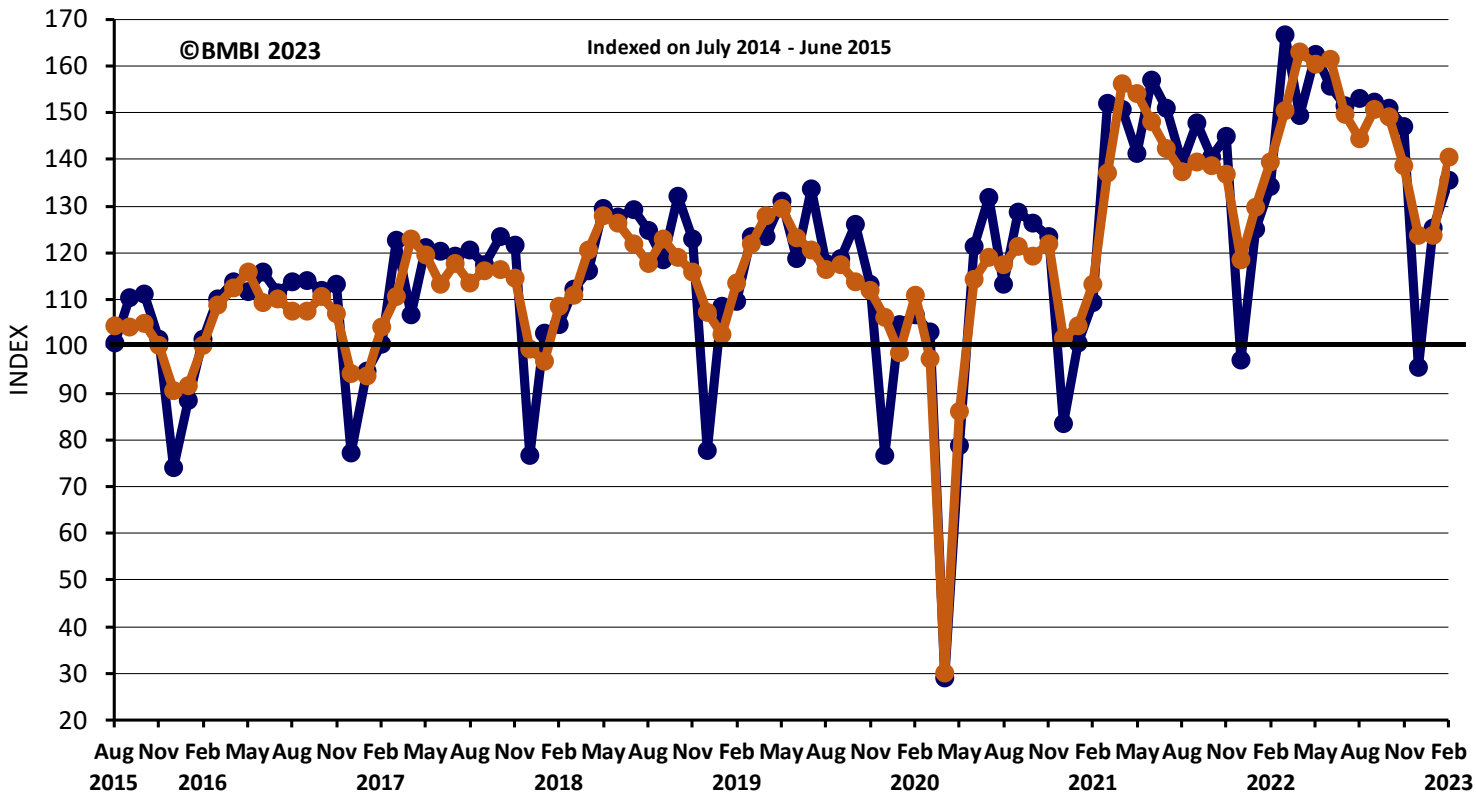
## Sales and like-for-like sales

20 trading days this month v 21 trading days in the index base period. Like-for-like sales take trading day differences into account.



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

● Total sales index      ● Total like-for-like Index



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023

February's overall  
BMBI Index was  
135.2. With one less  
trading day, the like-  
for-like index was  
140.6.

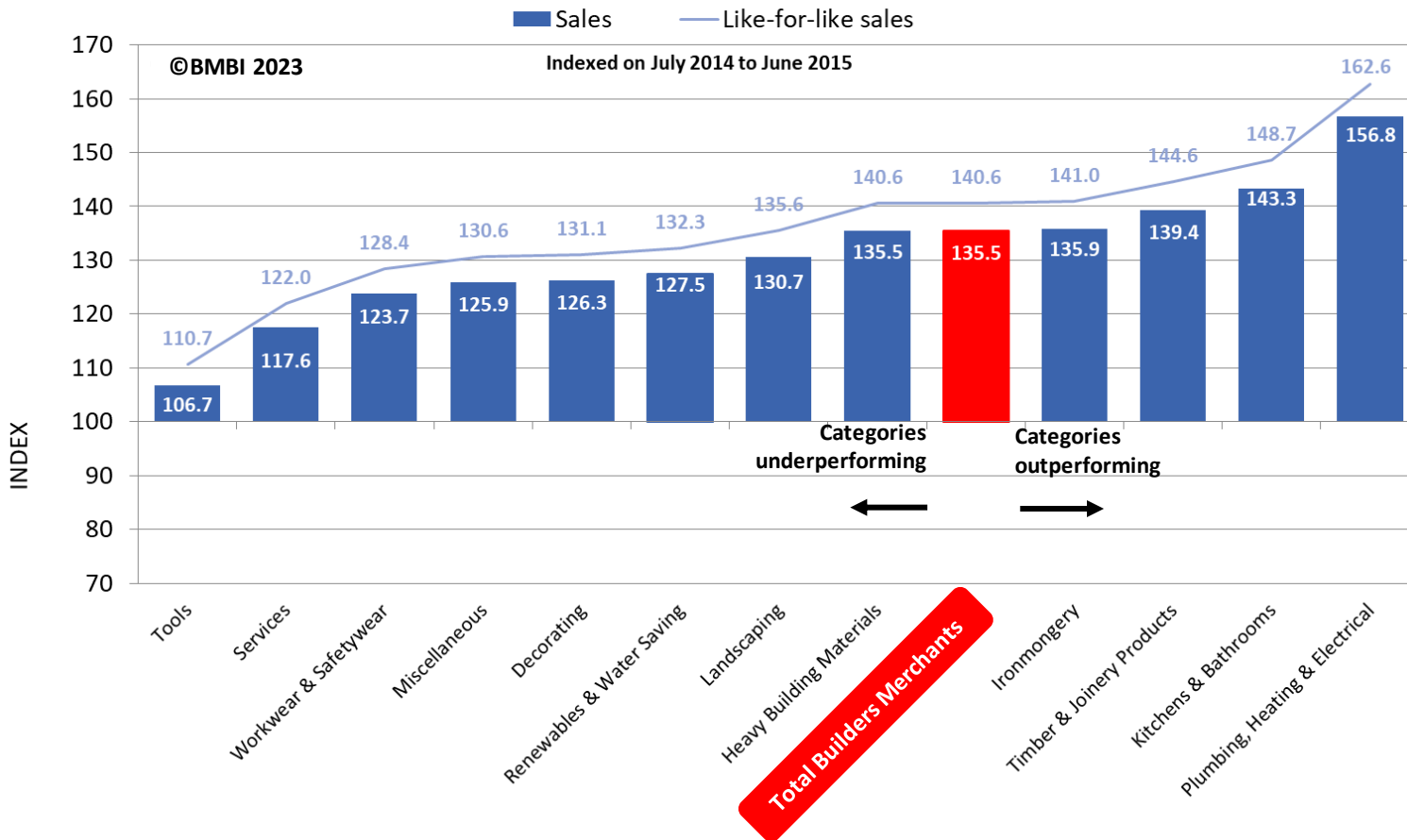
# Monthly: Index and Categories

## February 2023 index

20 trading days this month v 21 trading days in the index base period. Like-for-like sales take trading day differences into account.



### February 2023 Index



Source: GfK's Builders Merchants Total Category Report July 2015 to February 2023

All categories indexed above 100 in February with Plumbing, Heating & Electrical (156.8) doing best.

# Trading Days



**Builders Merchant  
Building Index**

## Monthly

Index: 20.8

2021											
Jan 20	Feb 20	Mar 23	Apr 20	May 19	Jun 22	Jul 22	Aug 21	Sep 22	Oct 21	Nov 22	Dec 17
2022											
Jan 20	Feb 20	Mar 23	Apr 19	May 21	Jun 20	Jul 21	Aug 22	Sep 21	Oct 21	Nov 22	Dec 16
2023											
Jan 21	Feb 20	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

## Quarterly

Index: 62.3

2021				2021		2021	
Q1 63	Q2 61	Q3 65	Q4 60	H1 124	H2 125	249	
2022				2022		2022	
Q1 63	Q2 60	Q3 64	Q4 59	H1 123	H2 123	246	
2023				2023		2023	
Q1	Q2	Q3	Q4	H1	H2		

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to February 2023



# GfK's Definition of Builders Merchant Panel



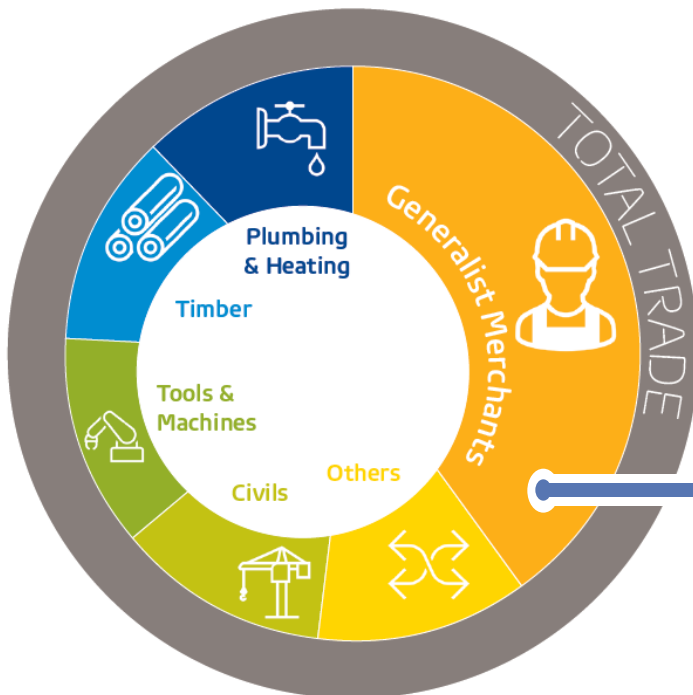
## Generalist Builders Merchants definition:

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

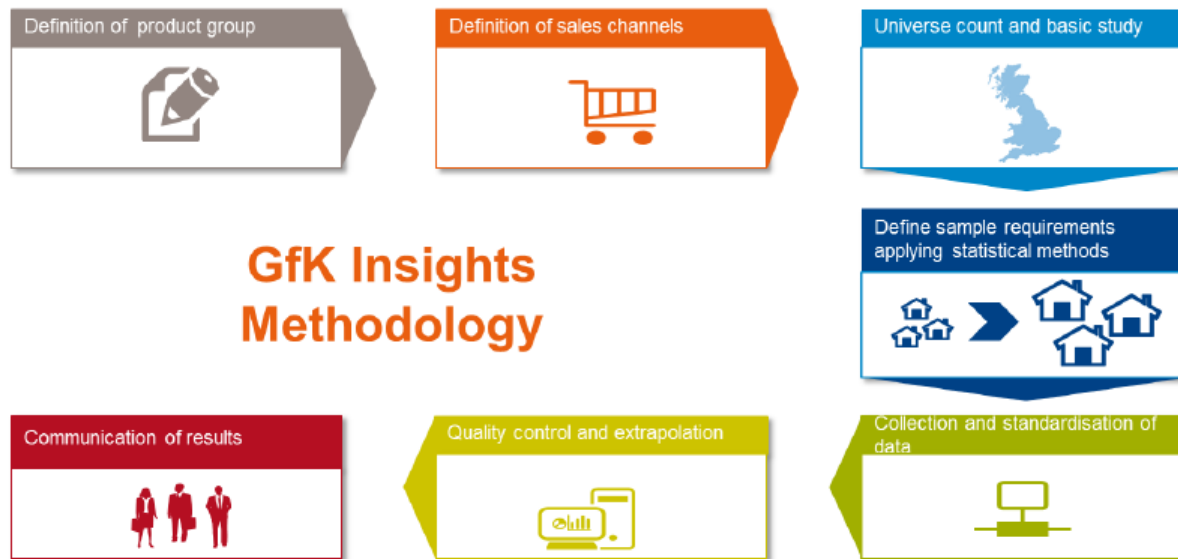
Examples include:



INDEPENDENT BUILDERS MERCHANT GROUP



# GfK Insights Methodology



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

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

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

# GfK's Product Categories

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



## Headline values available

### Timber & Joinery Products

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

### Heavy Building Materials

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

### Decorating

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

### Tools

Hand Tools  
Power Tools  
Power Tool Accessories  
Ladders & Access Equipment

### Workwear And Safetywear

Clothing  
Safety Equipment

### Ironmongery

Fixings And Fastenings  
Security  
Other Ironmongery

### Landscaping

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

### Plumbing Heating & Electrical

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

### Renewables And Water Management

Water Saving  
Renewables & Ventilation

### Kitchens & Bathrooms

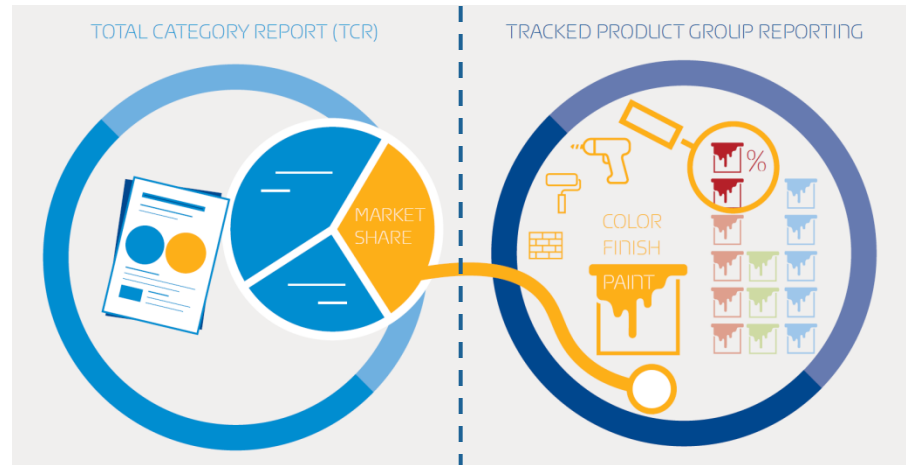
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

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

### Services

Toolhire / Hire Services  
Other Services



## In-depth product group reporting

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

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

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

### Available categories:

#### Heavyside

Bricks  
Insulation

#### Lightside

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

“building **excellence**  
in materials supply”



“building **excellence**  
in materials supply”

## BMF (Builders Merchant Federation) Forecast Report

# BMF Forecast Report

## Winter 2022 edition

### Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Winter 2022 onwards, is available now.

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

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

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

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

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



# Building the Industry & Building Brands from Knowledge



# Contact us

For further information



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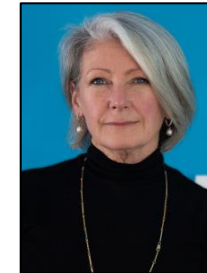


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