

Excellence in building
materials supply

Builders Merchant Building Index



Monthly report for January 2025

(Published 26 March 2025)

Highlights

Total value sales in November 2024 to January 2025 were -1.9% lower than the same period last year. Total volume sales were up (+1.3%) and prices were down -3.1%. Full comment on page [8](#).

BMBI Report January 2025 Highlights (unadjusted for trading days)

+33.9%



Latest month v last year

Jan 2025 value sales down -2.3%
on Jan 2024

-2.3%



Latest month v previous month

Jan 2025 value sales up +33.9%
on Dec 2024



Latest three months v last year

Nov 2024 - Jan 2025 value sales down -1.9%
on Nov 2023 - Jan 2024

-1.9%



Latest 12 month v last year

Feb 2024 - Jan 2025 value sales down -4.1%
on Feb 2023 - Jan 2024

-4.1%

“ Total Builders Merchants value sales were down -2.3% in January 2025 compared with the same month last year. Total Builders Merchants' volume sales were +0.0% and prices were down -2.3%.”

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Introduction:

Builders Merchant Building Index



This **Builders Merchant Building Index (BMBI)** report contains data from NiQ GfK's ground-breaking Builders Merchants Panel, which analyses data from over 88% of generalist builders' merchants' sales throughout Great Britain. NiQ 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 January 2019 to December 2019.

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 January 2025 [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 on pages 5 and 6 of this report or read their previous comments [here](#).**

BMBI - the best proxy there is for RMI

One of the aims of BMBI is to reach across and beyond construction. It's syndicated monthly to a growing number of trade magazines in different sectors. Outside the industry, economists, banks, consultancies, investment bodies, advisors and accountants refer to it. BMBI is featured alongside the BoE and Office for National Statistics (ONS) data in the Government **Department for Business & Trade's 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. NiQ GfK insights go much deeper and include sales value data. NiQ GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you.

NiQ 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.vanderryst@nielseniq.com.

The Expert Panel

Speaking for their markets - 1

The Builders Merchant Building Index (BMBI) includes a 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 2024 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 2024 Report](#)

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

[Read latest Comment: Q4 2024 Report](#)

Expert for Fasteners and Fixings:



Ian Doherty
Chief Executive
Owlett-Jaton

[Read latest Comment: Q4 2024 Report](#)

Expert for Roof Windows:



Roof Windows

Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q4 2024 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q4 2024 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q4 2024 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Heidelberg Materials

[Read latest Comment: Q4 2024 Report](#)

Expert for Paint:



Paul Edworthy
Commercial Lead
Dulux Trade

[Read latest Comment: Q4 2024 Report](#)

Expert for Website & Product Data Management Solutions:



Chris Fisher
Vice President of the EMEA lumber,
building material and hardware
(LBMH) division

[Read latest Comment: Q4 2024 Report](#)

Expert for Plumbing & Drainage:



Charles Burns
Divisional Director
Brett Martin

[Read latest Comment: Q4 2024 Report](#)



Expert for Heating & Cooling:



Matt Williams
Managing Director
Polypipe

[Read latest Comment: Q4 2024 Report](#)



NIQ



88% coverage of the market

As part of its ongoing drive to ensure the most accurate and relevant understanding of market coverage GfK conducts universe studies every few years.

These studies aim to understand the number of retailers / merchants and the branches they have in a defined universe - in this case the mainland Great Britain Builders Merchants channel.

The previous iteration of the BMBI used a universe study conducted in 2019, with coverage then estimated at 82% was revised up to 92% in the October 2023 report with the introduction of CMO, Huws Gray and JT Dove.

GfK has since completed its latest universe study for the channel and now estimates coverage to sit at 88%.

For any queries around this, please reach out to Emile van der Ryst at emile.vanderryst@nielseniq.com.

Based on its latest universe study for the builders' merchant channel, GfK estimates coverage is 88%.

Overview - 1

January 2025 value sales were -2.3% down compared with January last year

Total Builders Merchants value sales were down -2.3% in January 2025 compared with the same month last year. Services (+3.5%) and Tools (+2.4%) were the only categories to sell more. Categories performing better than Total Merchants, although still in decline, include Heavy Building Materials (-1.2%), Ironmongery (-1.5%) and Workwear & Safetywear (-1.9%). Decorating (-6.3%) was the weakest. There was no difference in trading days. Total Builders Merchants' volume sales were flat (+0.0%) and prices were down -2.3%.

January 2025 v December 2024

Total Merchants value sales were +33.9% higher in January 2025 than in December 2024. All twelve categories sold more. Seven of the twelve categories performed better than Total Builders Merchants: Miscellaneous (+38.9%), Ironmongery (+38.5%), Workwear & Safetywear (+38.2%), Timber & Joinery Products (+37.4%), Heavy Building Materials (+35.5%), Plumbing Heating & Electrical (+35.1%) and Kitchens & Bathrooms (+34.1%). Services was the weakest at +13.5%. With five more trading days this month, like-for-like value sales (which take trading day differences into account) were up +3.5%. Total Merchants' volume sales were +34.3% up and prices were down -0.3%.

January Index:

January's overall BMBI index was 100.2. Ten of the twelve categories exceeded 100. Workwear & Safetywear (145.4) had the highest index versus the 2019 base period, followed by Plumbing Heating & Electrical (118.8), Renewables & Water Saving (116.1), Kitchens & Bathrooms (108.7), and Decorating (107.4). Timber & Joinery Products (95.6), and seasonal category Landscaping (82.8) indexed less than Total Builders Merchants. With one more trading day this month versus the Index base period, the like-for-like value sales index was 94.1.

Latest three months v last year: November 2024 - January 2025 v November 2023 - January 2024

Total value sales in November 2024 to January 2025 were -1.9% lower than the same period last year. Three of the twelve categories sold more, with Tools (+4.4%) up the most. Renewables & Water Saving (-10.4%) was the weakest performing category. There was no difference in trading days. Total volume sales were up (+1.3%) and prices were down -3.1%.

Total value sales in the 3 months November 2024 to January 2025 were -1.9% lower than the same period last year.

Total volume sales were up +1.3%. Prices were down -3.1%.

Overview continues on the next page...

Overview - 2

... continued from the previous page:

Latest three months v previous three months: November 2024 - January 2025 v August 2024 - October 2024

Total value sales in November 2024 to January 2025 were -19.4% lower than in August to October 2024. All categories sold less. Ten categories performed better than Total Builders Merchants with Plumbing Heating & Electrical (-5.2%), Workwear and Safetywear (-7.2%) and Miscellaneous (-7.7%) declining less. Seasonal category Landscaping (-32.8%) was weakest. With five less trading day this period, like-for-like value sales were -12.7% lower. Total volume sales were down -21.9% with prices up (+3.2%).

Latest 12 months v last year: February 2024 - January 2025 v February 2023 - January 2024

Total value sales in the last 12 months, February 2024 to January 2025, were -4.1% down on the previous period, February 2023 to January 2024. Five of the twelve categories sold more with Workwear & Safetywear (+8.9%) up the most, followed by Tools (+6.5%) and Services (+3.2%). The two largest categories Timber & Joinery Products (-6.3%) and Heavy Building Materials (-5.3%) declined more than Total Merchants. Renewables & Water Saving (-22.2%) was weakest. With two more trading days this period, like-for-like value sales were -4.9% lower. Total volume sales were -4.1% down with flat prices (+0.0%).

Total value sales in the last 12 months, February 2024 to January 2025, were -4.1% down on the previous period, February 2023 to January 2024.

Total volume sales were -4.1% down with flat prices (+0.0%).

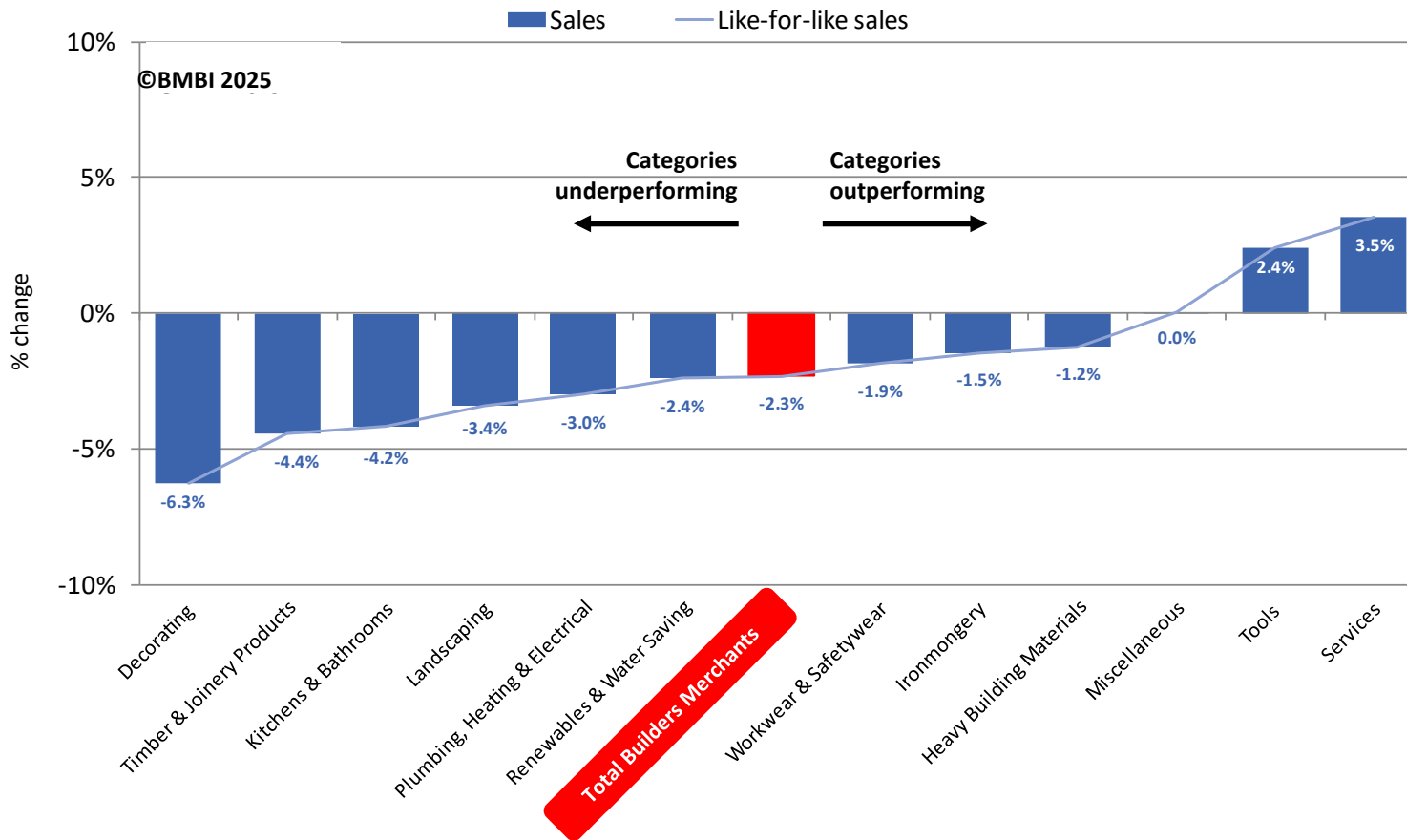
Latest month v last year

Value sales and like-for-like value sales % change

There was no difference in trading days (22).
Like-for-like sales take trading day differences into account.



January 2025 v January 2024



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Total Builders Merchants value sales were down -2.3% in January 2025 compared with the same month last year.

Total Builders Merchants' volume sales were flat (+0.0%) and prices were down -2.3%.

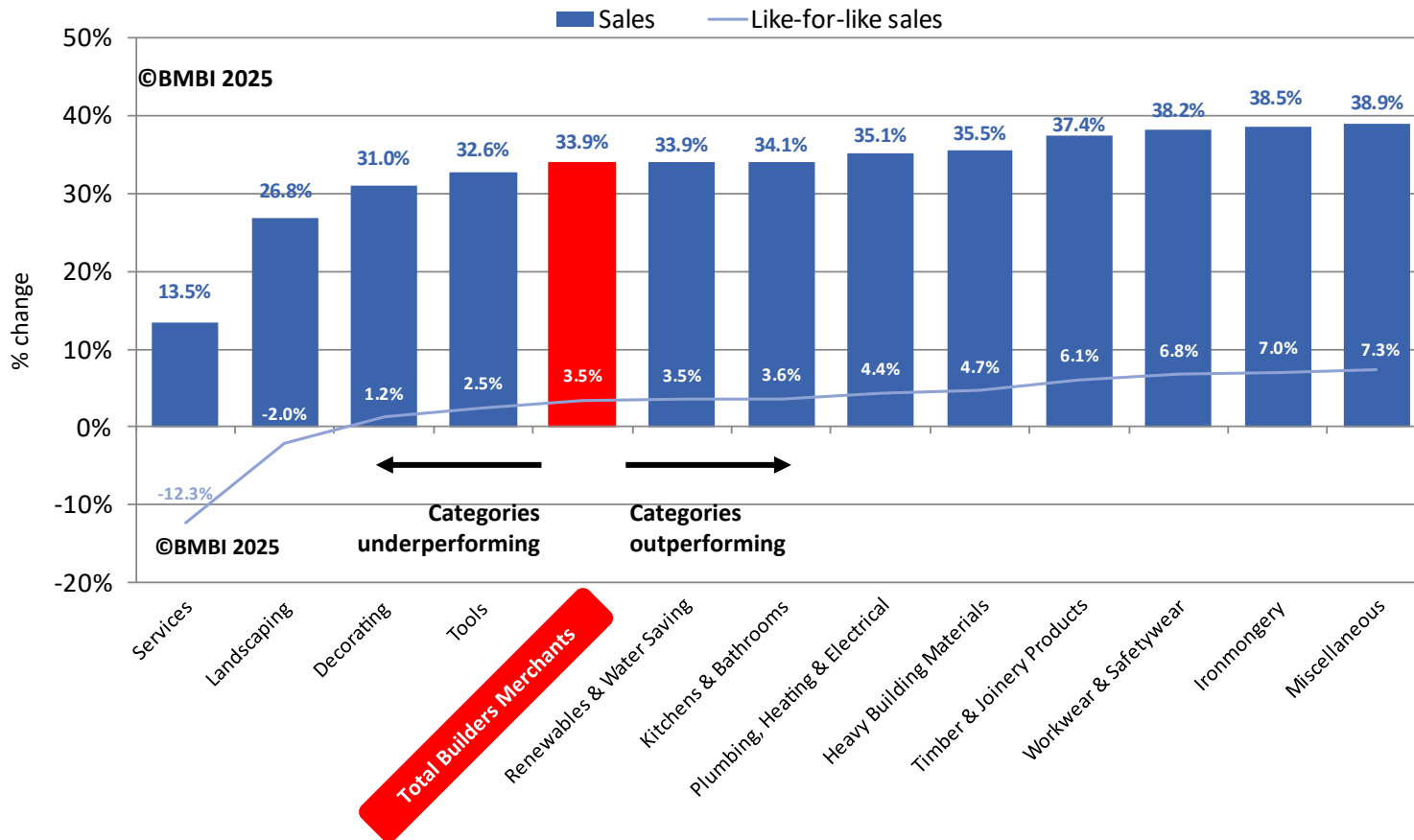
Latest month v previous month

Value sales and like-for-like value sales % change



22 trading days this month v 17 trading days last month.
Like-for-like sales take trading day differences into account.

January 2025 v December 2024



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Total Merchants value sales were +33.9% higher in January 2025 than in December 2024.

Total Merchants' volume sales were +34.3% up and prices were down -0.3%.

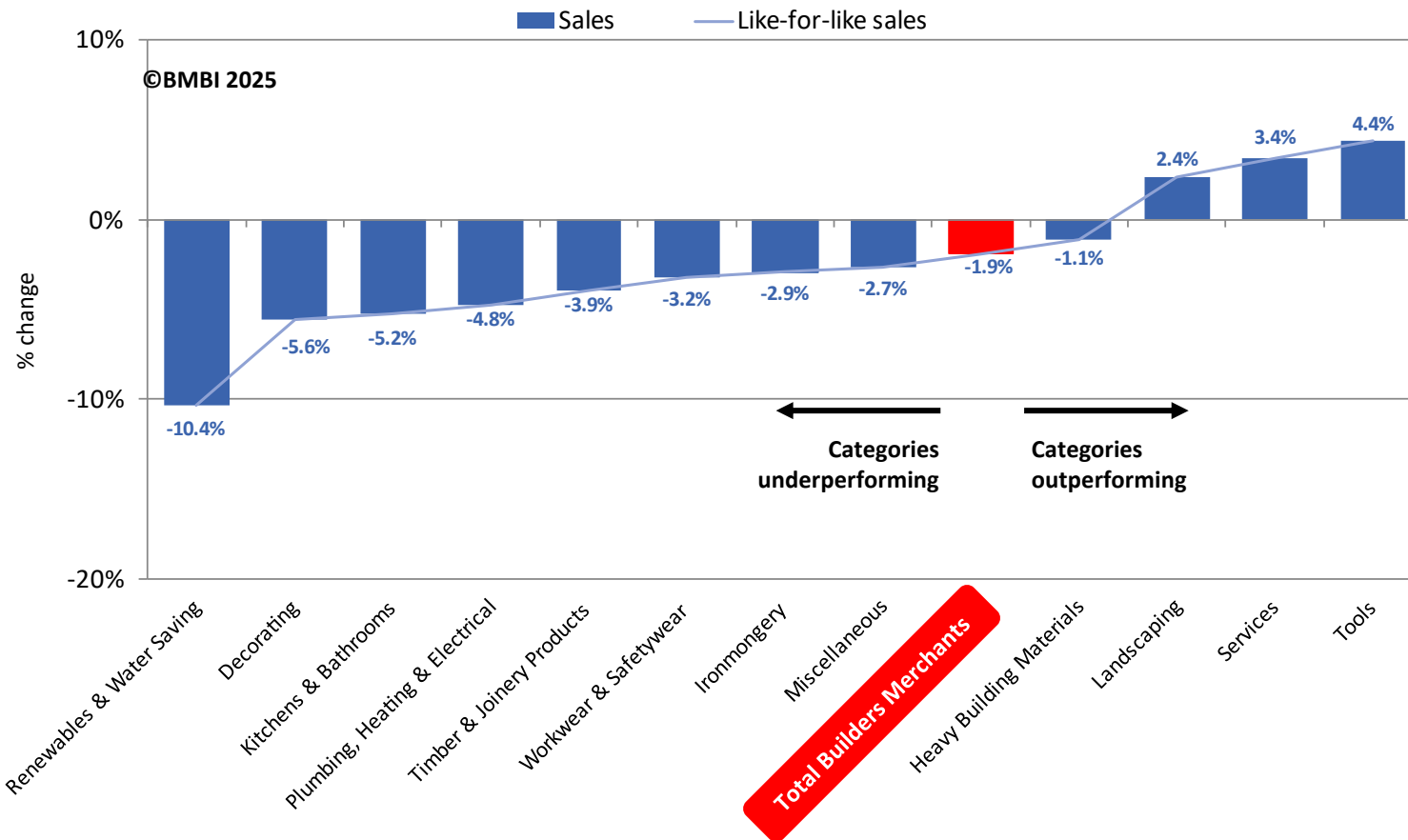
Latest 3 months v last year

Value sales and like-for-like value sales % change

There was no difference in trading days (60).
Like-for-like sales take trading day differences into account.



3 months Nov 24 to Jan 25 v 3 months Nov 23 to Jan 24



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Total value sales in November 2024 to January 2025 were -1.9% lower than the same period last year.

Total volume sales were up (+1.3%) and prices were down -3.1%.

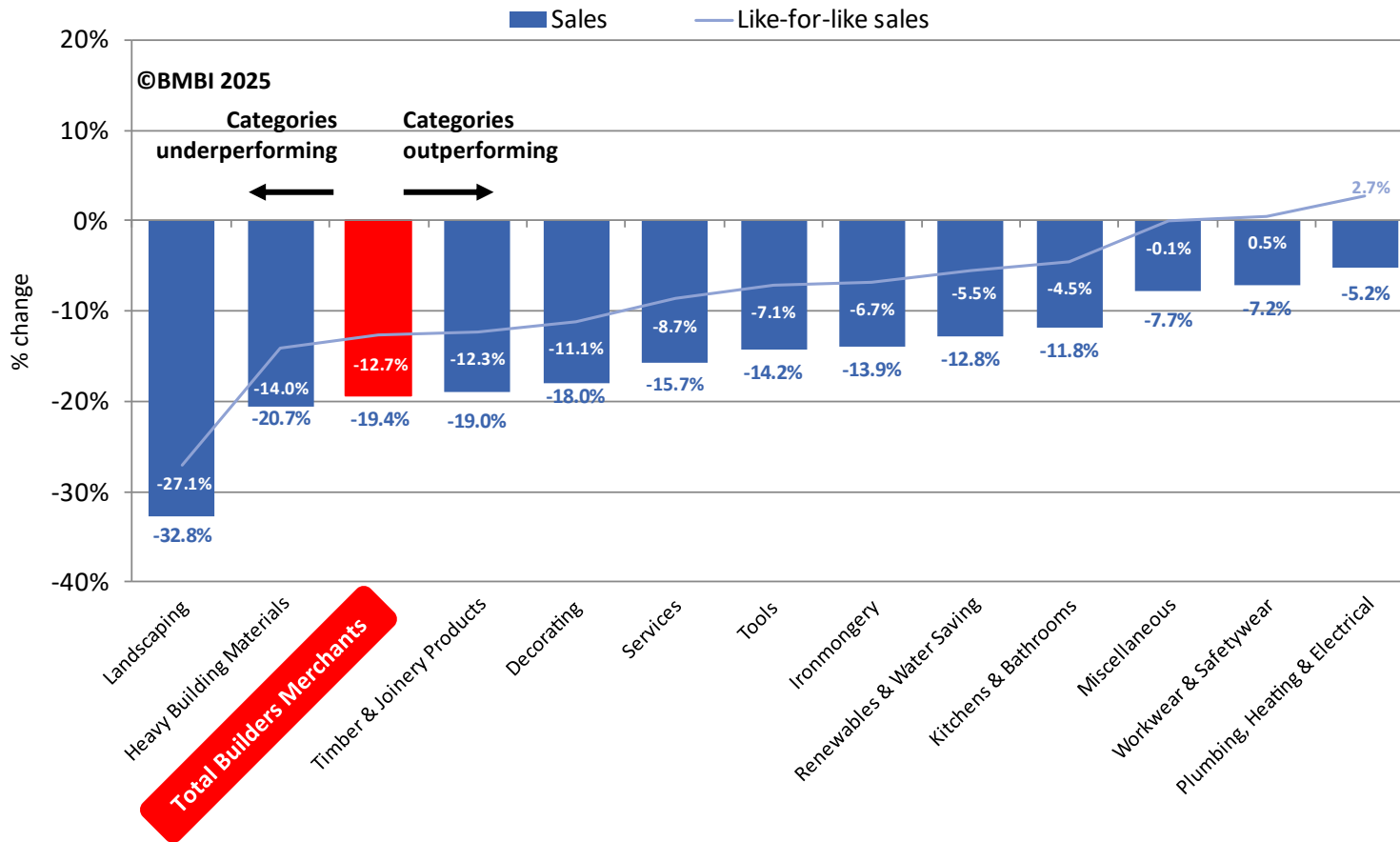
Latest 3 months v previous 3 months

Value sales and like-for-like value sales % change

60 trading days this recent period v 65 trading days in the previous period.
Like-for-like sales take trading day differences into account.



3 months Nov 24 to Jan 25 v 3 months Aug 24 to Oct 24



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Total value sales in November 2024 to January 2025 were -19.4% lower than in August to October 2024.

Total volume sales were down -21.9% with prices up (+3.2%).

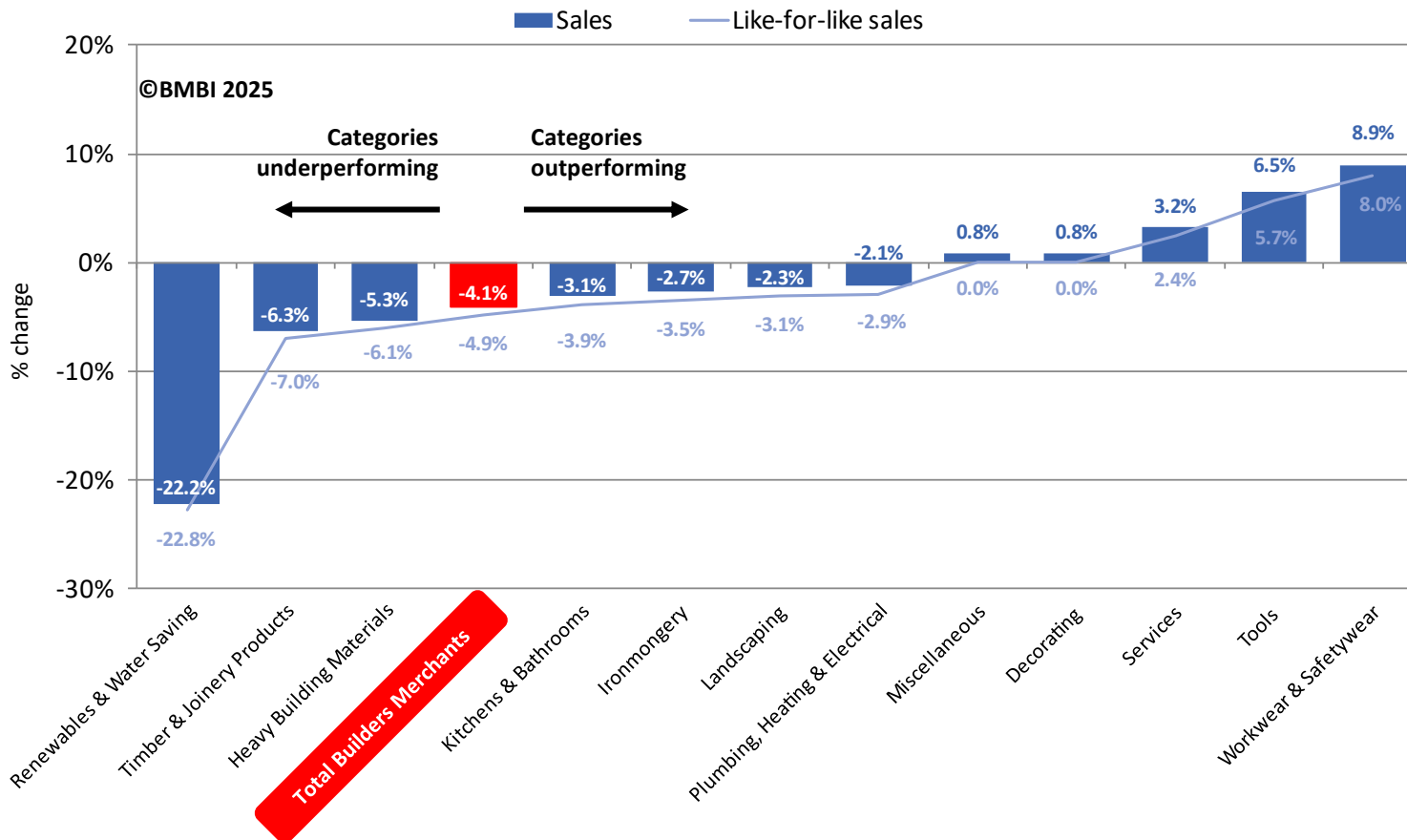
Latest 12 months v last year

Value sales and like-for-like value sales % change



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

12 months Feb 24 to Jan 25 v 12 months Feb 23 to Jan 24



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

The two largest categories Timber & Joinery Products (-6.3%) and Heavy Building Materials (-5.3%) declined more than Total Merchants.

Monthly Year-on-year

Value sales % change

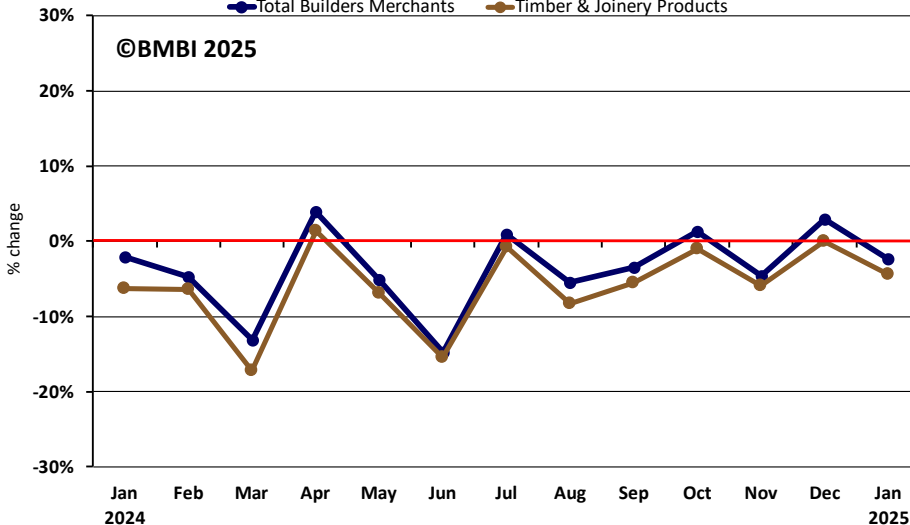
January 2025



Timber & Joinery Products - Monthly

● Total Builders Merchants ● Timber & Joinery Products

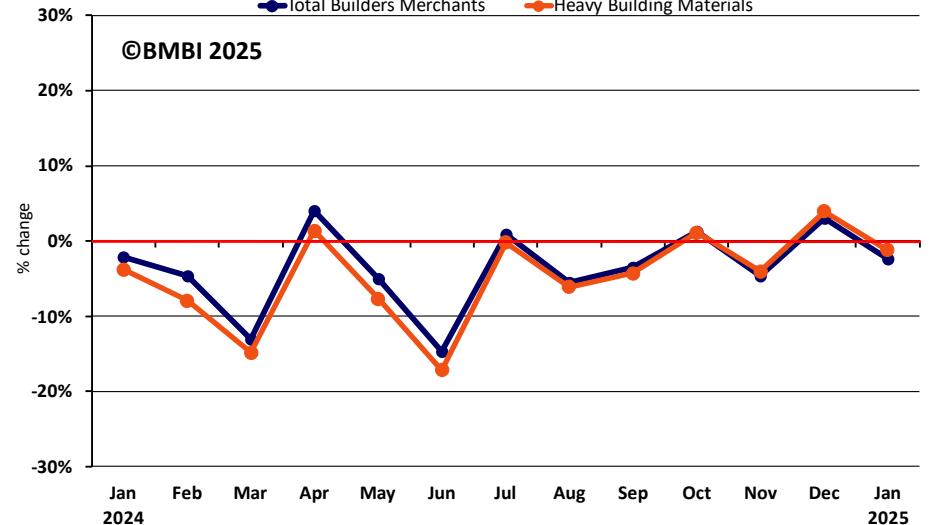
©BMBI 2025



Heavy Building Materials - Monthly

● Total Builders Merchants ● Heavy Building Materials

©BMBI 2025



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Monthly Year-on-year

Value sales % change

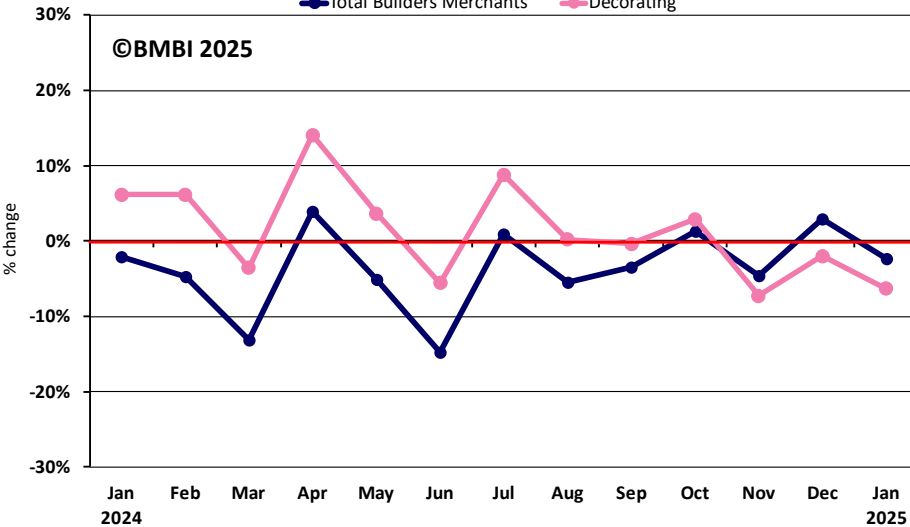
January 2025



Decorating - Monthly

● Total Builders Merchants ● Decorating

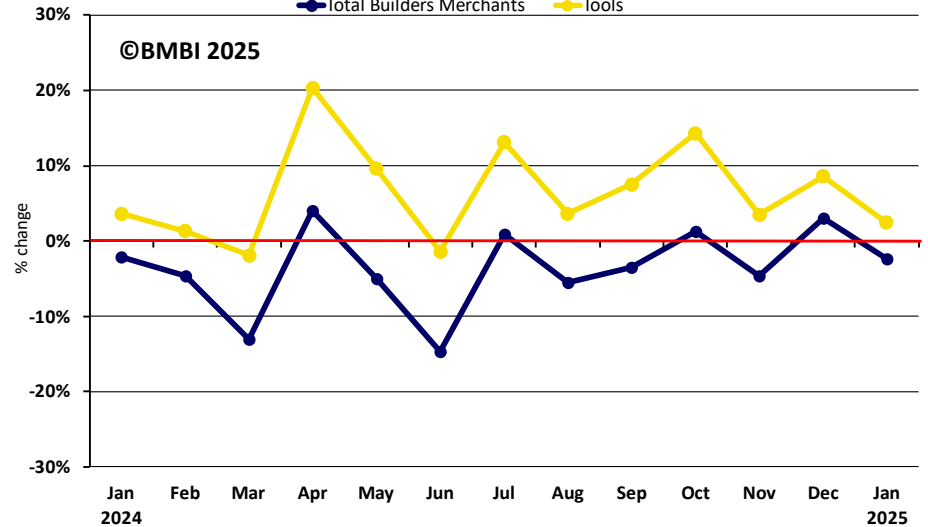
©BMBI 2025



Tools - Monthly

● Total Builders Merchants ● Tools

©BMBI 2025



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Monthly Year-on-year

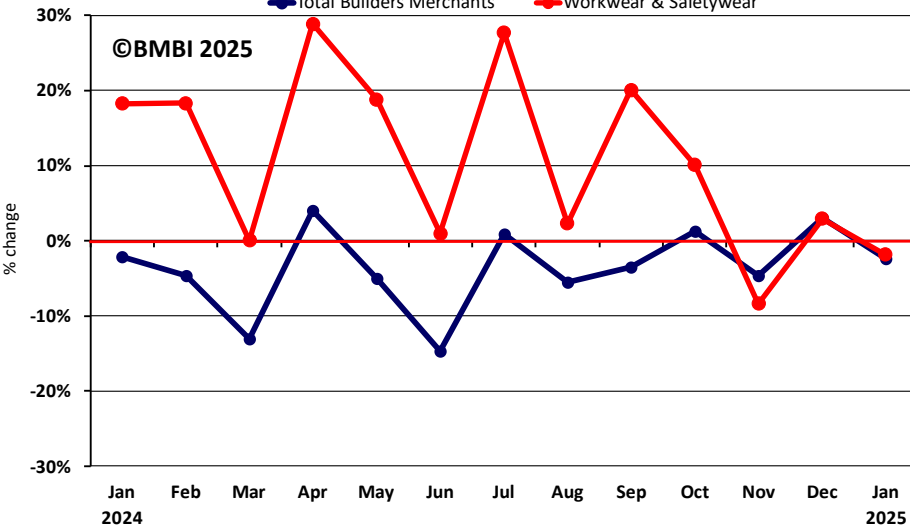
Value sales % change

January 2025

Workwear & Safetywear - Monthly

● Total Builders Merchants ● Workwear & Safetywear

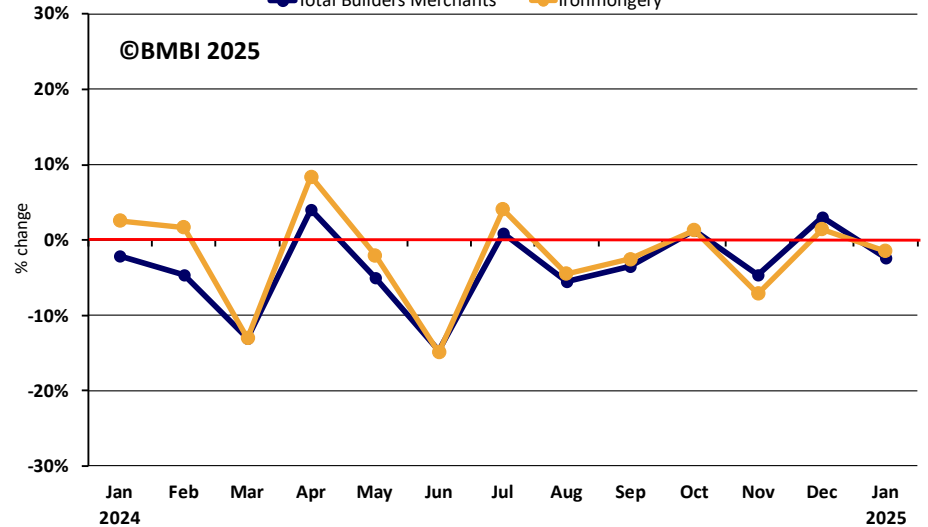
©BMBI 2025



Ironmongery - Monthly

● Total Builders Merchants ● Ironmongery

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Monthly Year-on-year

Value sales % change

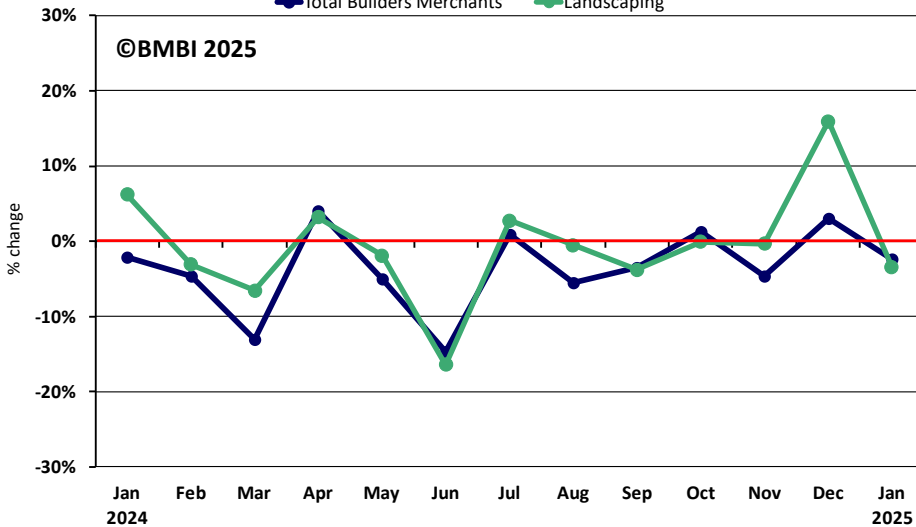
January 2025



Landscaping - Monthly

● Total Builders Merchants ● Landscaping

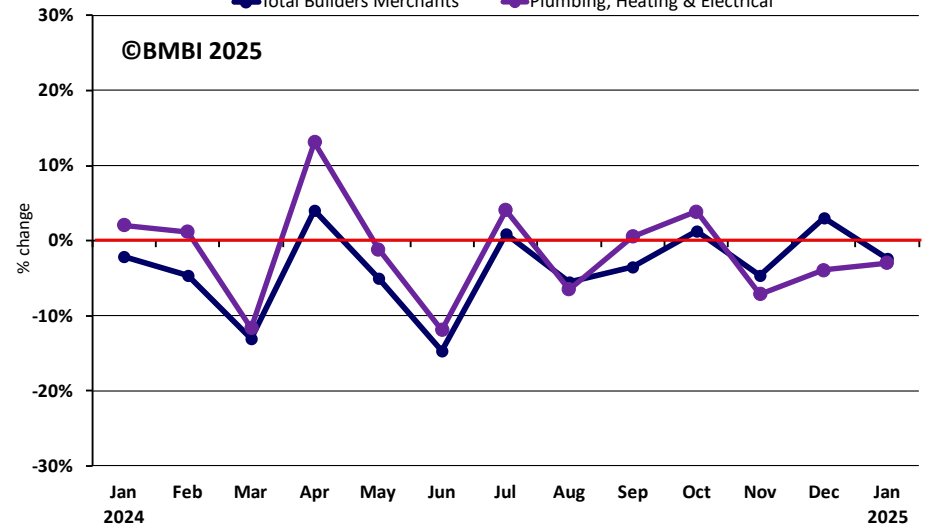
©BMBI 2025



Plumbing Heating & Electrical - Monthly

● Total Builders Merchants ● Plumbing, Heating & Electrical

©BMBI 2025



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Monthly Year-on-year

Value sales % change

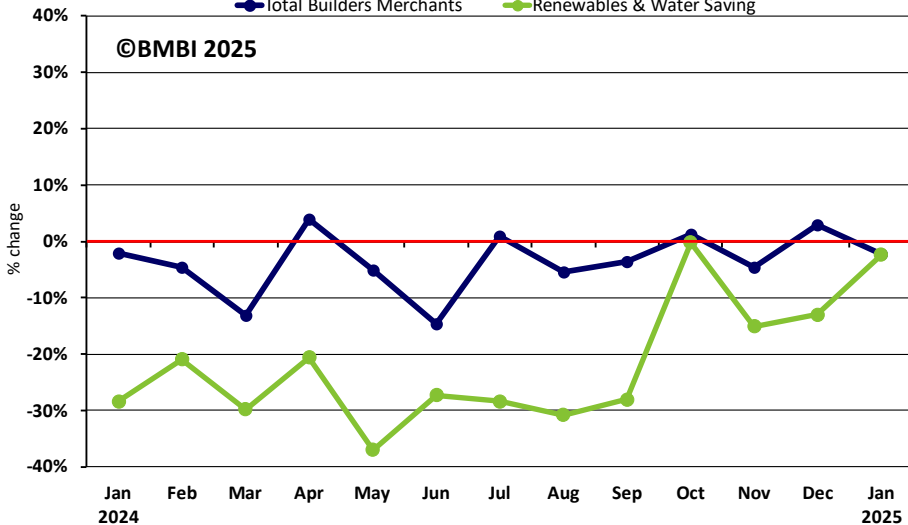
January 2025



Renewables & Water Saving - Monthly

● Total Builders Merchants ● Renewables & Water Saving

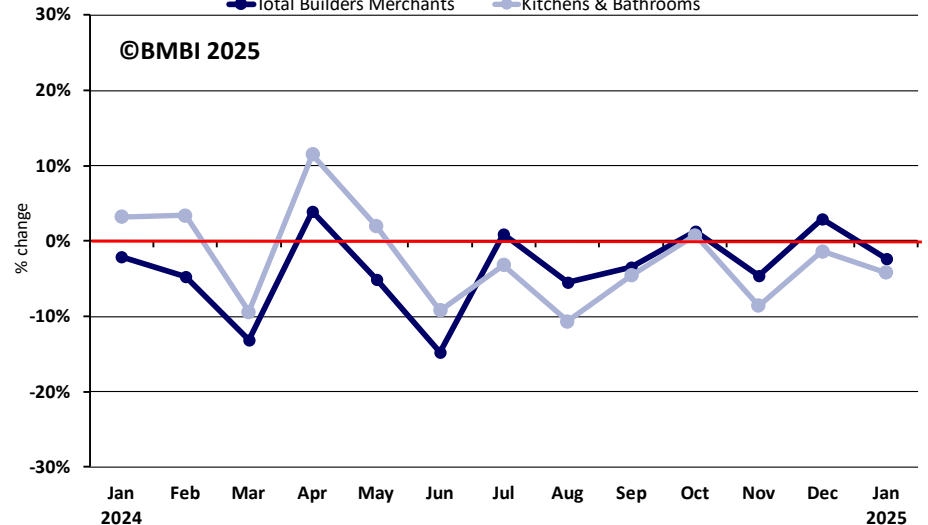
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Kitchens & Bathrooms - Monthly

● Total Builders Merchants ● Kitchens & Bathrooms

©BMBI 2025



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Monthly Year-on-year

Value sales % change

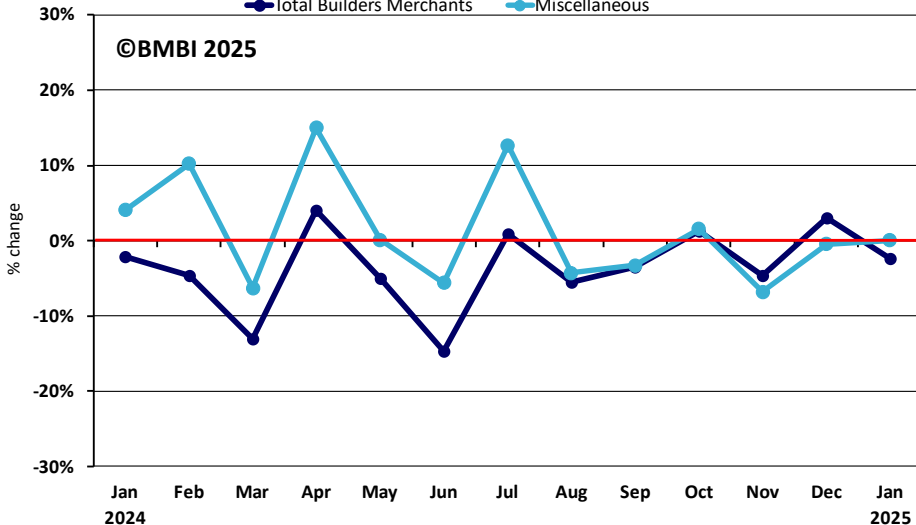
January 2025



Miscellaneous - Monthly

● Total Builders Merchants ● Miscellaneous

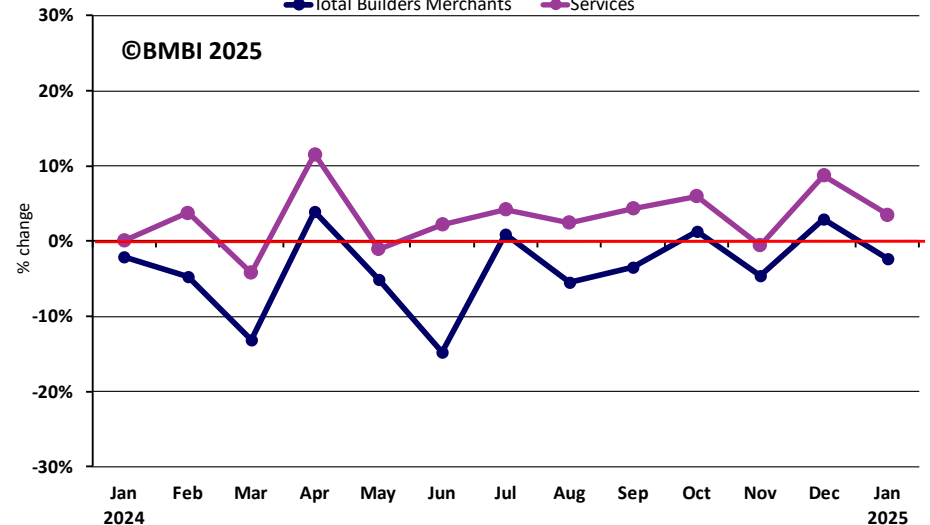
©BMBI 2025



Services - Monthly

● Total Builders Merchants ● Services

©BMBI 2025



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Monthly: Index by Categories

January 2024* - January 2025

(Indexed on monthly average, January 2019 – December 2019)



		2024												2025
MONTHLY SALES VALUE INDEX	Index	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan
Total Builders Merchants	100	102.6	107.4	112.1	117.7	121.2	113.9	127.1	116.8	114.9	123.2	110.9	74.8	100.2
Timber & Joinery Products	100	100.1	102.4	105.3	109.1	110.9	104.6	117.7	109.0	108.4	116.4	105.0	69.6	95.6
Heavy Building Materials	100	102.0	108.0	112.6	118.0	122.4	115.5	130.2	119.5	117.6	126.3	113.2	74.4	100.8
Decorating	100	114.7	116.8	119.5	122.9	124.2	119.3	132.8	122.9	120.8	131.5	118.4	82.0	107.4
Tools	100	104.1	107.0	115.6	118.7	116.5	110.2	121.2	111.2	113.8	128.9	116.5	80.4	106.6
Workwear & Safetywear	100	148.2	141.9	138.2	131.8	135.5	118.4	141.8	121.0	148.3	162.2	149.7	105.2	145.4
Ironmongery	100	105.5	104.4	102.8	108.2	108.2	101.3	116.7	106.7	106.4	116.2	104.4	75.0	103.9
Landscaping	100	85.7	100.2	120.8	139.5	157.1	143.2	148.0	134.3	116.9	113.5	97.1	65.3	82.8
Plumbing, Heating & Electrical	100	122.5	119.9	115.5	113.8	107.2	98.9	114.3	102.8	112.7	130.0	120.9	87.9	118.8
Renewables & Water Saving	100	118.9	127.4	121.5	130.8	106.8	112.6	128.0	113.5	111.5	148.6	123.2	86.7	116.1
Kitchens & Bathrooms	100	113.4	117.6	116.1	119.1	118.5	112.1	121.1	110.8	117.5	124.4	121.2	81.1	108.7
Miscellaneous	100	105.6	104.0	100.7	101.4	101.5	96.3	112.4	99.7	96.6	112.0	102.8	76.0	105.6
Services	100	98.6	105.1	112.4	119.6	118.9	112.6	127.6	122.0	113.9	125.4	112.6	90.0	102.1

*Click the web link below to see the complete series of indices from January 2023.



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

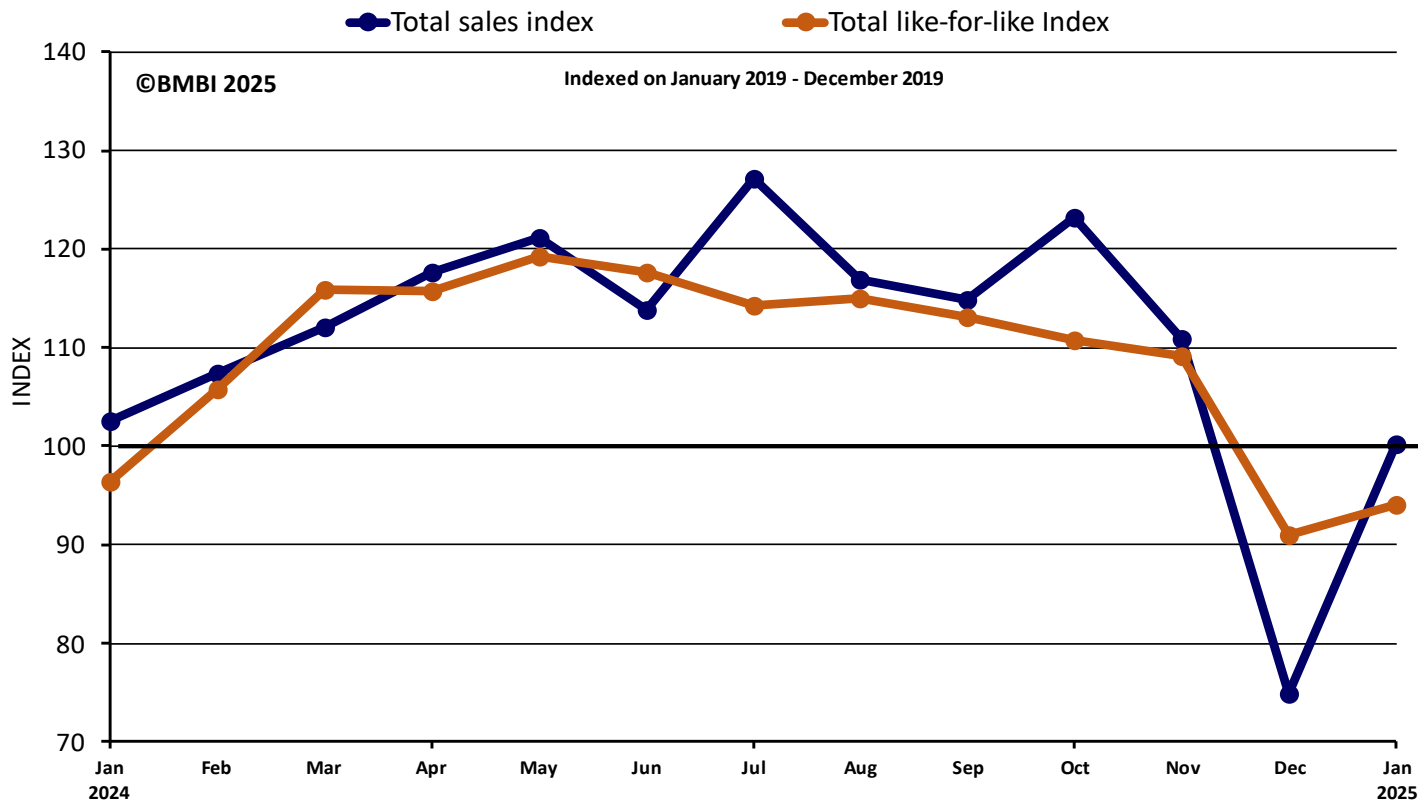
Monthly: Index

Value sales and like-for-like value sales index

There were 22 trading days in January 2025 vs the Index base period (21).
Like-for-like sales take trading day differences into account.



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



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

January's overall
BMBI index
was 100.2.

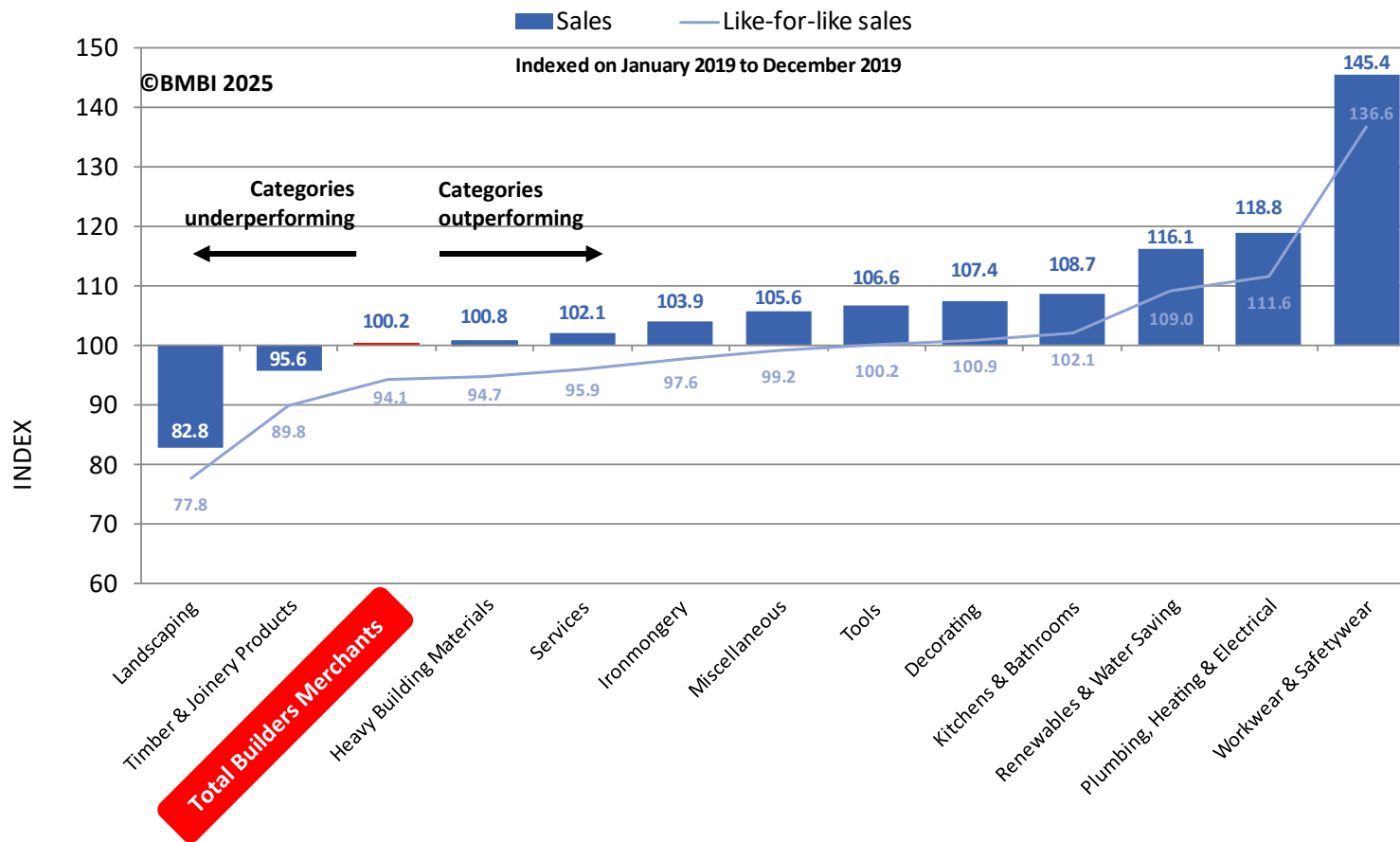
Latest month: Index by Categories

Value sales and like-for-like value sales index

There were 22 trading days in January 2025 vs 21 in the Index base period.
Like-for-like sales take trading day differences into account.



January 2025 Index



Source: GfK's Builders Merchants
Total Category Report: January
2019 to January 2025

Workwear & Safetywear (145.4) had the highest index versus the 2019 base period, followed by Plumbing Heating & Electrical (118.8), Renewables & Water Saving (116.1), Kitchens & Bathrooms (108.7), and Decorating (107.4).

Trading Days



Monthly

Index: 20.7

2023											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	23	18	20	22	21	22	21	22	22	16
2024											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	21	20	21	21	20	23	21	21	23	21	17
2025											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22											

Quarterly

Index: 62

2023				2023		2023
Q1	Q2	Q3	Q4	H1	H2	
64	60	64	60	124	124	248
2024				2024		2024
Q1	Q2	Q3	Q4	H1	H2	
63	62	65	61	125	126	251
2025				2025		2025
Q1	Q2	Q3	Q4	H1	H2	



Source: GfK's Builders Merchants Total Category Report: January 2019 to January 2025

GfK's Definition of Builders Merchant Panel



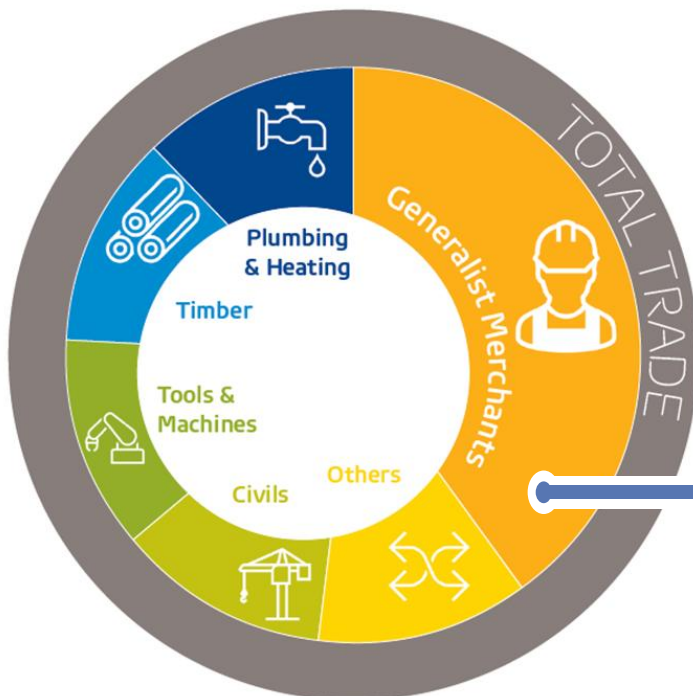
Generalist Builders Merchants definition:

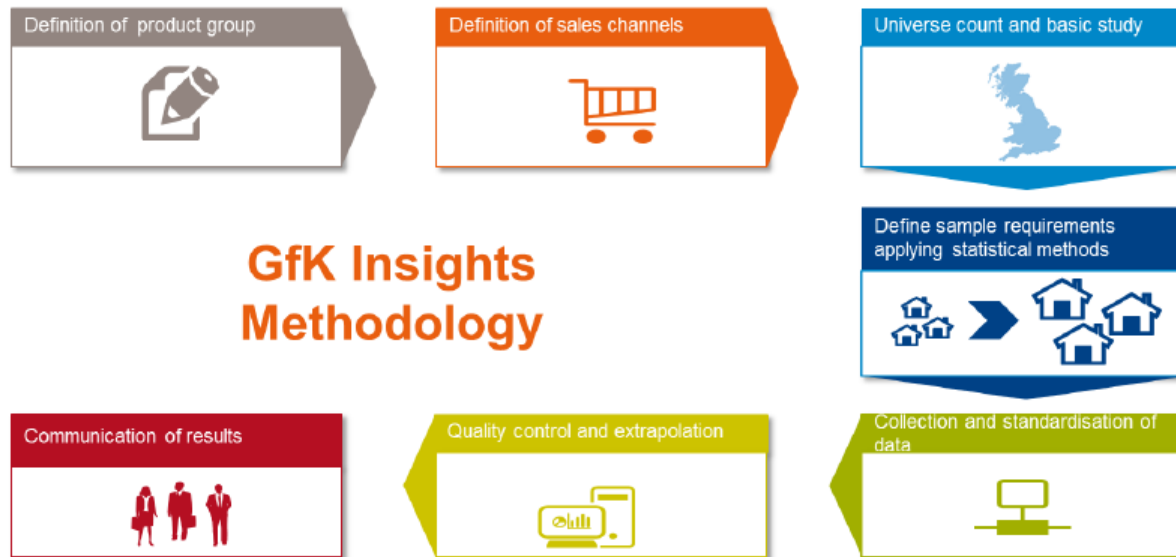
- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end 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 88%.

Examples include:



INDEPENDENT BUILDERS MERCHANT GROUP





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

NIQ



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

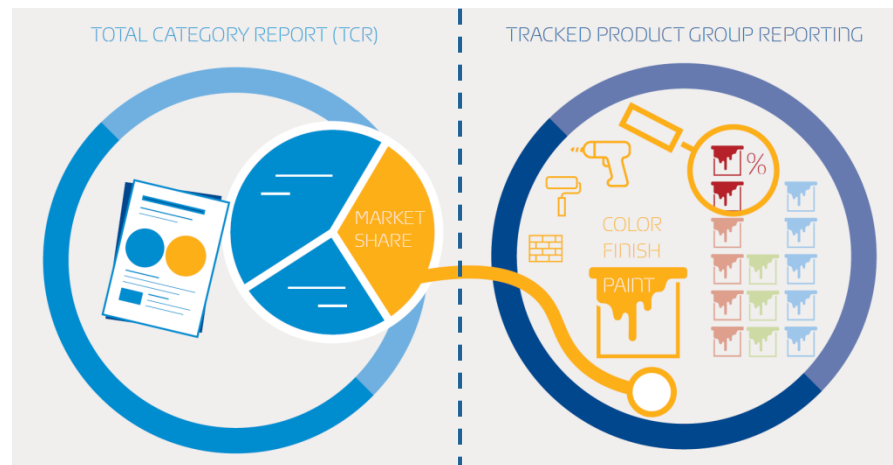
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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.vanderryst@nielseniq.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)

Excellence in building materials supply



BMF (Builders Merchant Federation) Forecast Report

BMF Forecast Report

Winter 2024 Edition

Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Winter 2024 onwards, is available.

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.

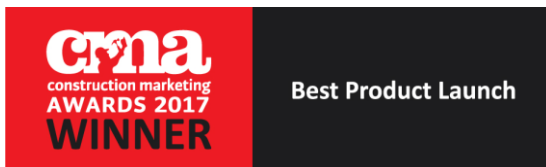
Using BMBI data coupled with advanced modelling techniques the BMF has developed a channel-specific forecasting model to show what is likely to happen in the next 12 months, making it possible for merchants and suppliers to forecast their customers' requirements more accurately.

The forecast report and its previous editions 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



Building the Industry & Building Brands from Knowledge



Contact us

For further information



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