

Excellence in building  
materials supply

# Builders Merchant Building Index



**Executive Summary - April 2025**

(Published 26 June 2025)

# Highlights

## BMBI Report April 2025 Highlights (unadjusted for trading days)

**+3.0%**



Latest month v last year  
Apr 2025 value sales up +3.0%  
on Apr 2024

**+0.9%**



Latest month v previous month  
Apr 2025 value sales up +0.9%  
on Mar 2025

**+2.6%**



Latest three months v last year  
Feb 2025 - Apr 2025 value sales up +2.6%  
on Feb 2024 - Apr 2024



Latest 12 month v last year  
May 2024 - Apr 2025 value sales down -2.3%  
on May 2023 - Apr 2024

**-2.3%**

“Total Builders Merchants value sales were up +3.0% in April 2025 compared with the same month last year. Total Builders Merchants' volume sales were up +3.4% and prices were down -0.3%.”

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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 April [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 4 and 5 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](mailto: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 Q1 2025 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: Q1 2025 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q1 2025 Report](#)

### Expert for Fasteners and Fixings:



**Ian Doherty**  
Non-Executive Director  
Hexstone and Owlett-Jaton

[Read latest Comment: Q1 2025 Report](#)

### Expert for Roof Windows:



Roof Windows

**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q1 2025 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q1 2025 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q1 2025 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Heidelberg Materials

[Read latest Comment: Q1 2025 Report](#)

### Expert for Paint:



**Paul Edworthy**  
Commercial Lead  
Dulux Trade

[Read latest Comment: Q1 2025 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: Q1 2025 Report](#)

### Expert for Plumbing & Drainage:



**Chris Dawson**  
Sales Director  
Brett Martin

[Read latest Comment: Q1 2025 Report](#)



### Expert for Heating & Cooling:



**Matt Williams**  
Managing Director  
Polypipe

[Read latest Comment: Q1 2025 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](mailto:emile.vanderryst@nielseniq.com).

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

# Overview - 1

## **April 2025 value sales were +3.0% up compared with April last year**

Total Builders Merchants value sales were up +3.0% in April 2025 compared with the same month last year. Seven of the twelve categories sold more led by Landscaping (+13.3%), Workwear & Safetywear (+8.7%), Miscellaneous (+5.3%) and Heavy Building Materials (+3.7%). Timber & Joinery Products (+1.7%) sold more but underperformed Total Merchants. Decorating (-3.3%) and Plumbing Heating & Electrical (-3.9%) were weakest. With one less trading day, like-for-like value sales (which take trading day differences into account) were up +8.2%. Total Builders Merchants' volume sales were up +3.4% and prices were down -0.3%.

### **April 2025 v March 2025**

Total Merchants value sales were +0.9% higher in April 2025 than in March 2025. Four of the twelve categories sold more with Landscaping (+15.6%) and Workwear & Safetywear (+6.0%) leading the field. Plumbing Heating & Electrical (-10.0%) was weakest. The two largest categories Timber & Joinery Products (+0.7%) and Heavy Building Materials (+0.1%) sold more but underperformed Total Merchants. With one less trading day this month, like-for-like value sales were up +5.9%. Total Merchants' volume sales were flat (-0.2%) and prices were up +1.0%.

### **April Index:**

April's overall BMBI index was 121.2. All categories exceeded 100. Seasonal category Landscaping (158.1) indexed the most, followed by Workwear & Safetywear (143.3) and Renewables & Water Saving (130.5). Miscellaneous (106.7) indexed the least. With one less trading day this month versus the Index base period, the like-for-like value sales index was 125.3.

### **Latest three months v last year: February 2025 - April 2025 v February 2024 - April 2024**

Total value sales in February 2025 to April 2025 were +2.6% higher than the same period last year. Ten of the twelve categories sold more, with Landscaping (+8.2%), Miscellaneous (+5.5%), Services (+4.5%) and Heavy Building Materials (+3.6%) performing better than Total Merchants. Kitchens & Bathrooms (-2.2%) and Decorating (-2.3%) were the weakest performing categories. With one less trading day this period, like-for-like value sales were up +4.3%. Total volume sales were up +4.9% and prices were down -2.2%.

Total value sales in February 2025 to April 2025 were +2.6% higher than the same period last year.

Total volume sales were up +4.9% and prices were down -2.2%.

Overview continues on the next page...



# Overview - 2

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## **Latest three months v previous three months: February 2025 - April 2025 v November 2024 - January 2025**

Total value sales in February 2025 to April 2025 were +21.0% higher than in November 2024 to January 2025. All categories sold more. Only two categories performed better than Total Builders Merchants: Landscaping (+59.1%) and Heavy Building Materials (+21.6%). Plumbing Heating & Electrical (+6.6%) and Workwear & Safetywear (+2.9%) were weakest. With one more trading day this period, like-for-like value sales were +19.0% higher. Total volume sales were up +25.1% but prices down -3.3%.

## **Year-to-date: January 2025 to April 2025 v January 2024 to April 2024**

Total value sales in January 2025 to April 2025 were +1.5% higher than January 2024 to April 2024. Five categories performed better than Total Builders Merchants: Landscaping (+6.0%), Services (+4.3%), Miscellaneous (+4.1%), Heavy Building Materials (+2.5%) and Tools (+1.7%). Kitchens & Bathrooms (-2.7%) and Decorating (-3.2%) were weakest. Timber & Joinery Products were also down (-0.6%). With one less trading day this period, like-for-like value sales were up +2.7%. Total volume sales were up +3.8% and prices down -2.2%.

## **Latest 12 months v last year: May 2024 - April 2025 v May 2023 - April 2024**

Total value sales in the last 12 months, May 2024 to April 2025, were -2.3% down on the previous period, May 2023 to April 2024. Five of the twelve categories sold more with Workwear & Safetywear and Tools (+5.3%) up the most, followed by Services (+3.5%), Miscellaneous (+0.8%) and Landscaping (+0.2%). The two largest categories Timber & Joinery Products (-4.2%) and Heavy Building Materials (-2.6%) were down. Renewables & Water Saving (-16.4%) was weakest. There was no difference in trading days. Total volume sales were -1.5% down with prices down -0.8%.

Total value sales in the last 12 months, May 2024 to April 2025, were -2.3% down on the previous period, May 2023 to April 2024.

Total volume sales were -1.5% down with prices down -0.8%.



# Latest month v last year

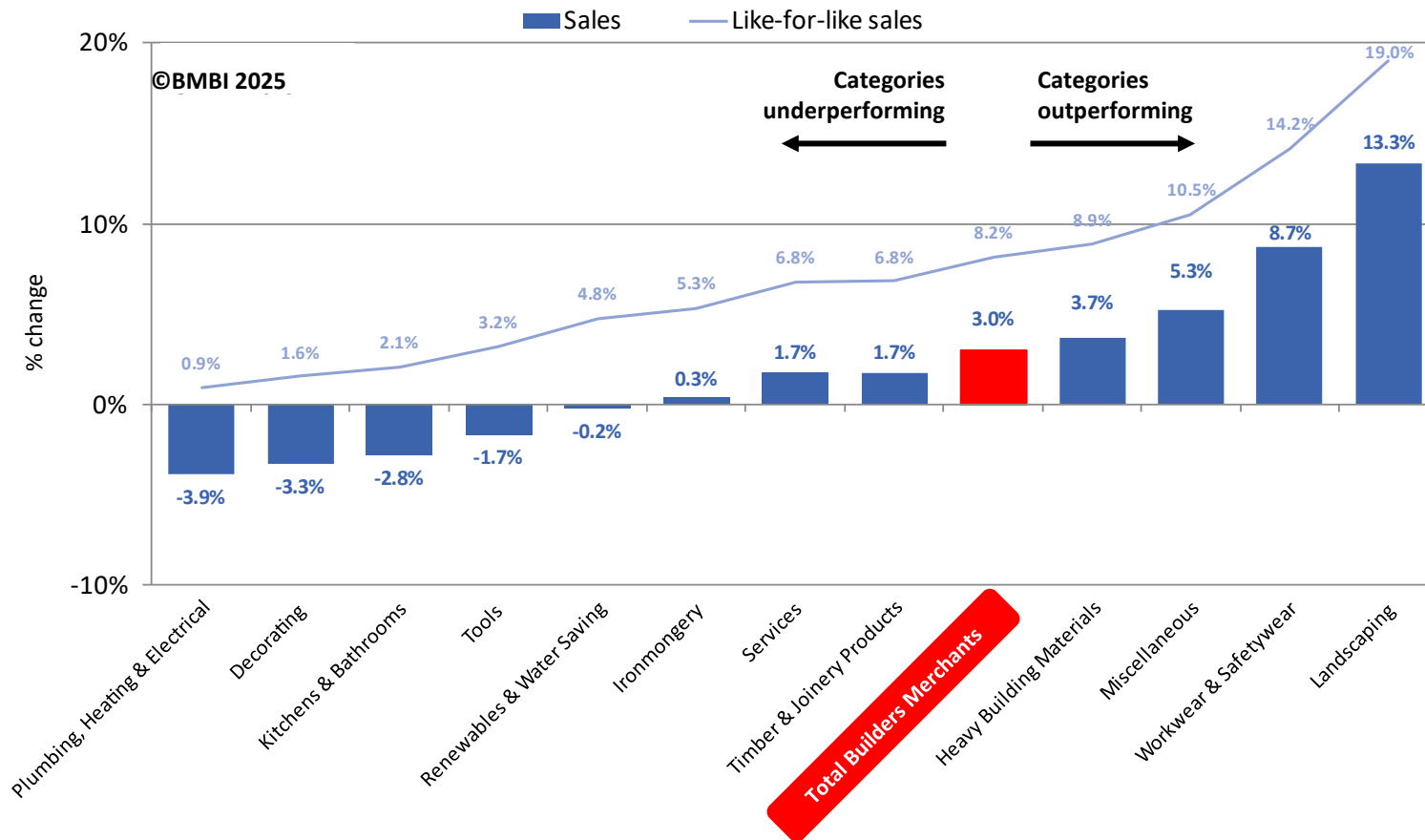
## Value sales and like-for-like value sales % change

20 trading days this year v 21 trading days last year.

Like-for-like sales take trading day differences into account.



### April 2025 v April 2024



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

Total Builders Merchants value sales were up +3.0% in April 2025 compared with the same month last year.

Total Builders Merchants' volume sales were up +3.4% and prices were down -0.3%.

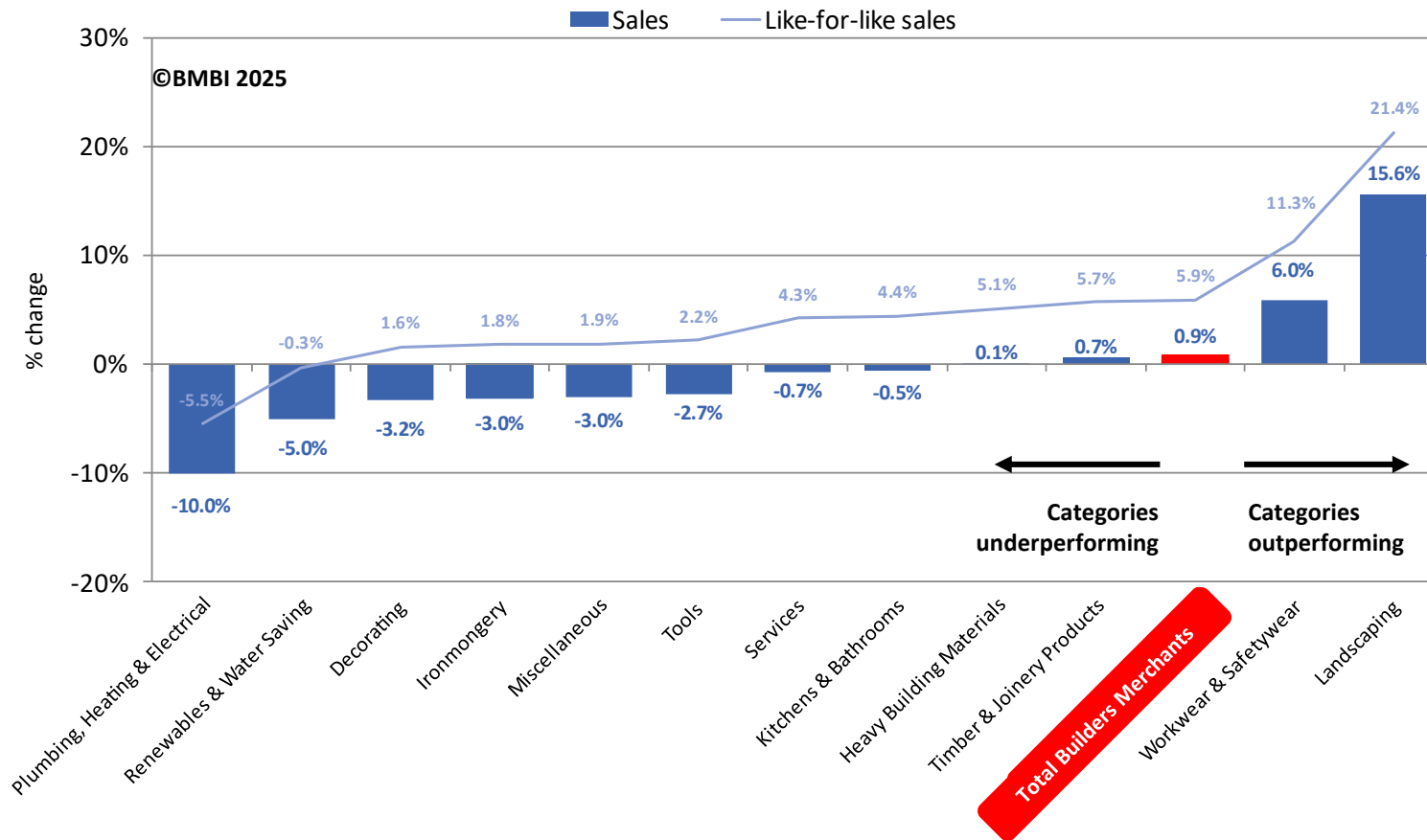
# Latest month v previous month

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

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



### April 2025 v March 2025



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

Total Merchants  
value sales were  
+0.9% higher in  
April 2025 than in  
March 2025.

Total Merchants'  
volume sales were  
flat (-0.2%) and  
prices were  
up +1.0%.

# Latest 3 months v last year

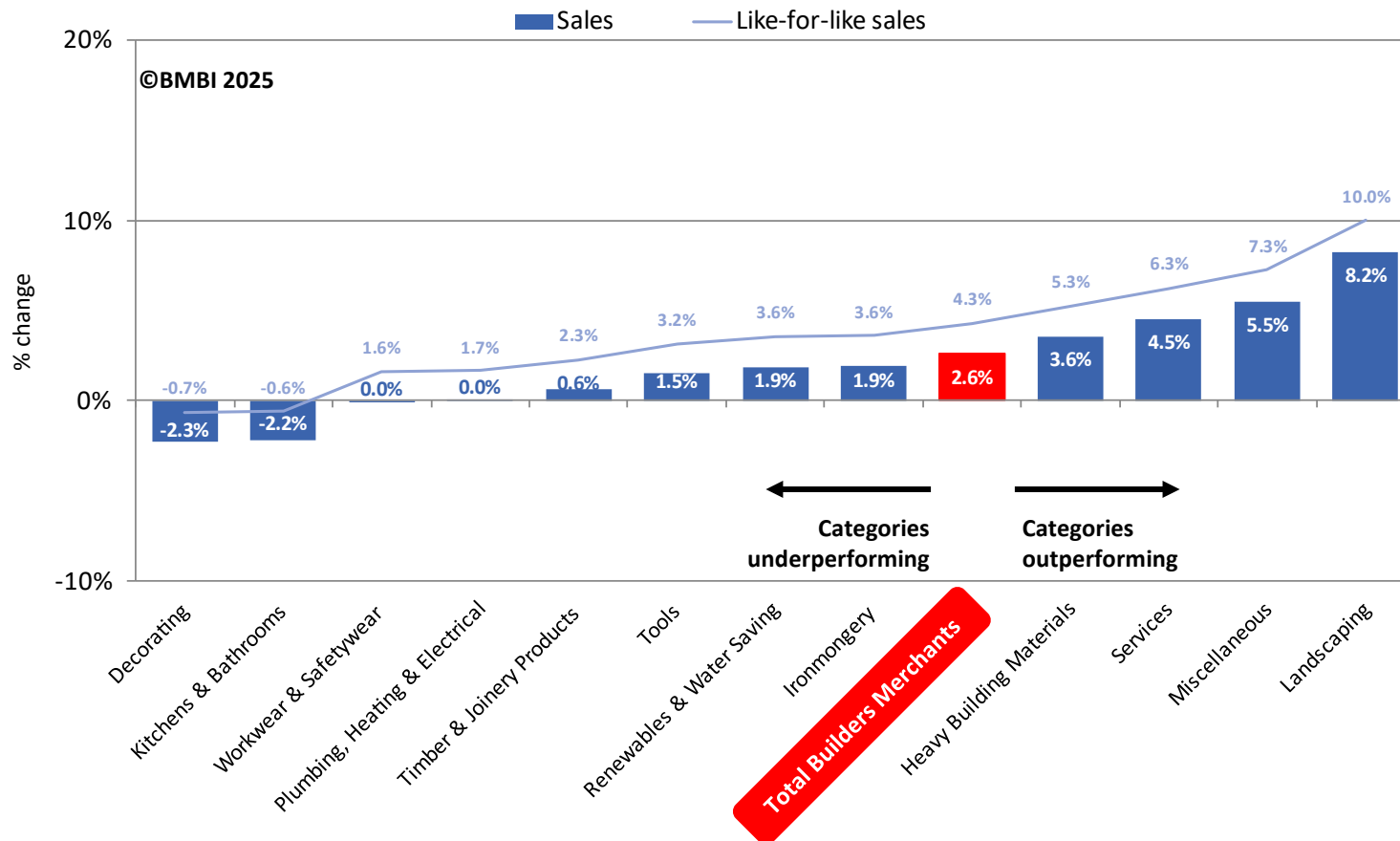
## Value sales and like-for-like value sales % change

61 trading days this recent period v 62 trading days in the previous period.

Like-for-like sales take trading day differences into account.



### 3 months Feb 25 to Apr 25 v Feb 24 to Apr 24



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

Total value sales in  
February 2025 to  
April 2025 were  
+2.6% higher than  
the same period  
last year.

Total volume sales  
were up +4.9% and  
prices were  
down -2.2%.

# Latest 3 months v previous 3 months

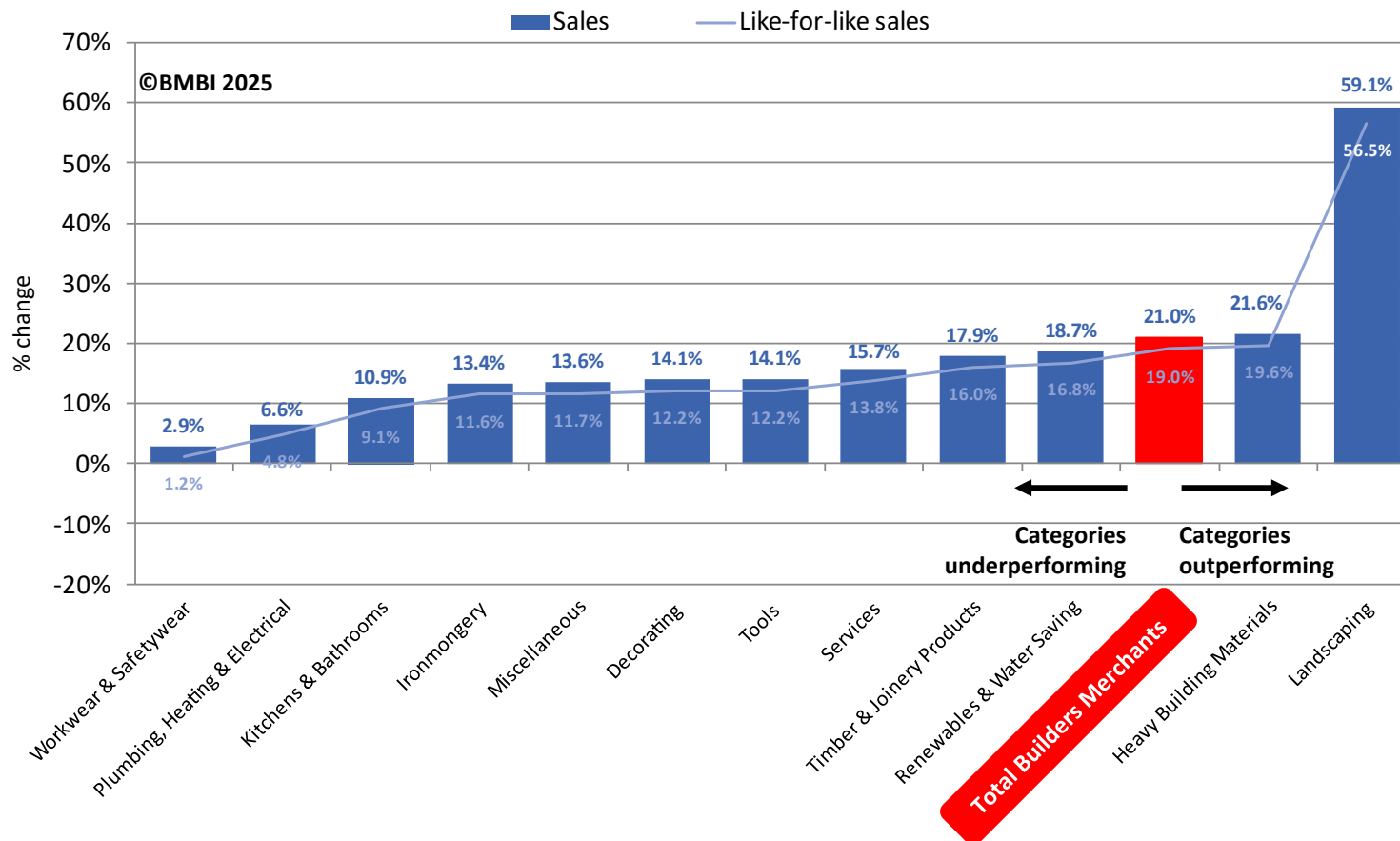
## Value sales and like-for-like value sales % change

61 trading days this recent period v 60 trading days in the previous period.

Like-for-like sales take trading day differences into account.



### 3 months Feb 25 to Apr 25 v 3 months Nov 24 to Jan 25



**NIQ** **GfK**

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

Total value sales in February 2025 to April 2025 were +21.0% higher than in November 2024 to January 2025.

Total volume sales were up +25.1% but prices down -3.3%.

# Year-to-date v last year

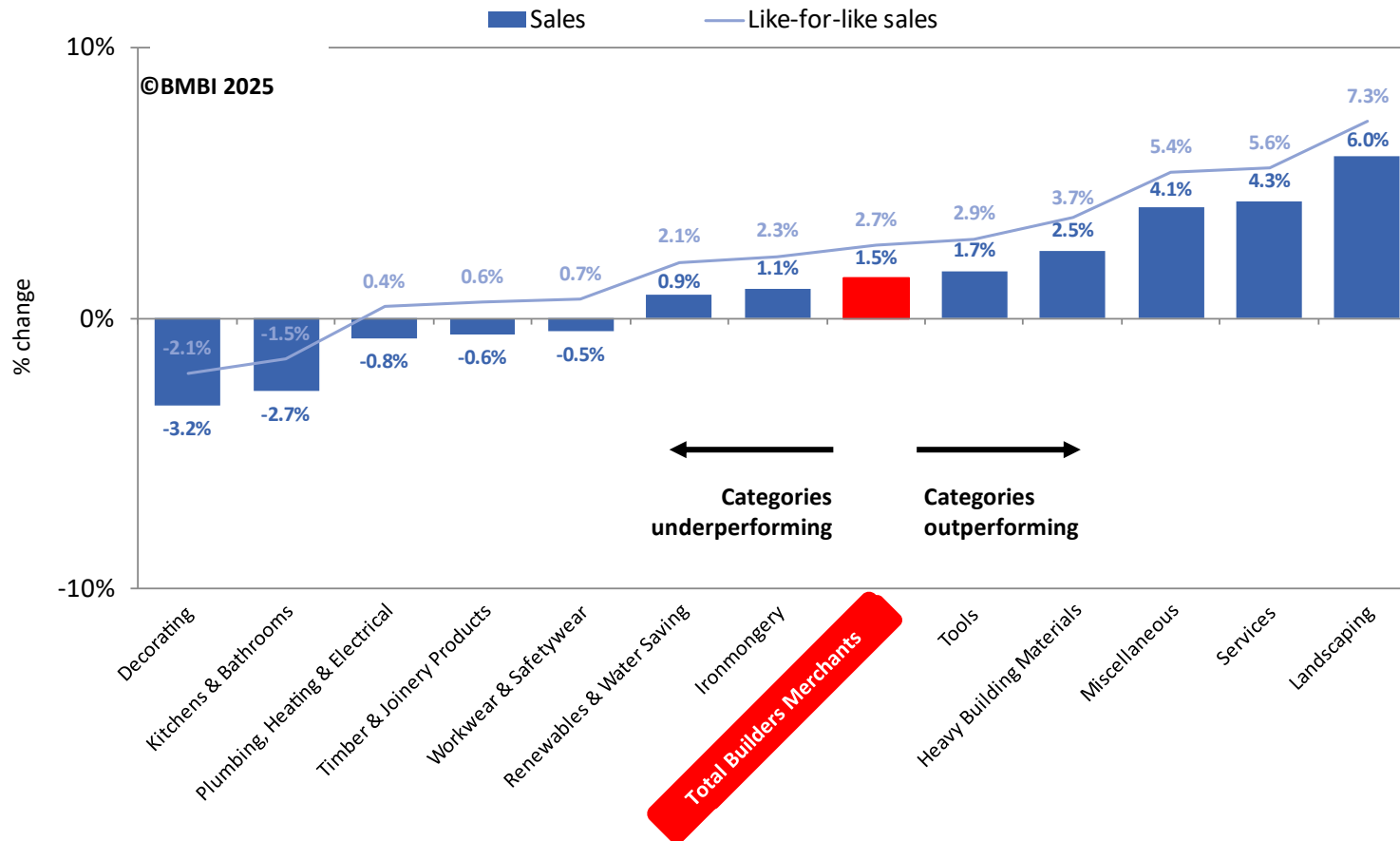
## Value sales and like-for-like value sales % change

83 trading days this year v 84 trading days last year.

Like-for-like sales take trading day differences into account.



### Year to date: Jan 25 to Apr 25 v Jan 24 v Apr 24



**NIQ** **GfK**

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

Total value sales in  
January 2025 to  
April 2025 were  
+1.5% higher than  
January 2024 to  
April 2024.

Total volume sales  
were up +3.8% and  
prices down -2.2%.

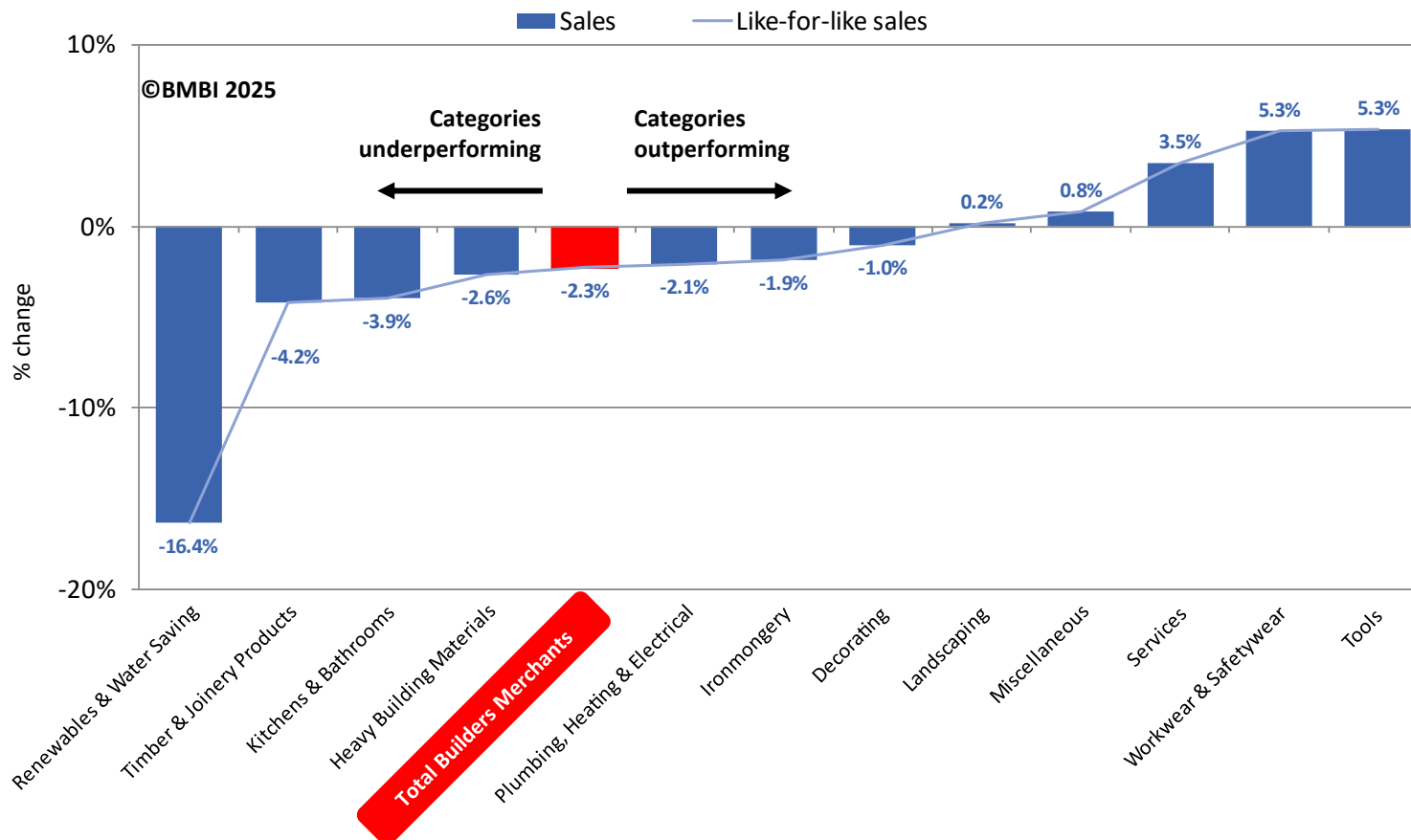
# Latest 12 months v last year

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

There was no difference in trading days (250).  
Like-for-like sales take trading day differences into account.



### 12 months May 24 to Apr 25 v 12 months May 23 to Apr 24



NIQ GfK

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

Total value sales in the last 12 months, May 2024 to April 2025, were -2.3% down on the previous period, May 2023 to April 2024.

Total volume sales were -1.5% down with prices down -0.8%.

# Appendix



# 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	20	21	20								

## 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	
63						

# 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'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

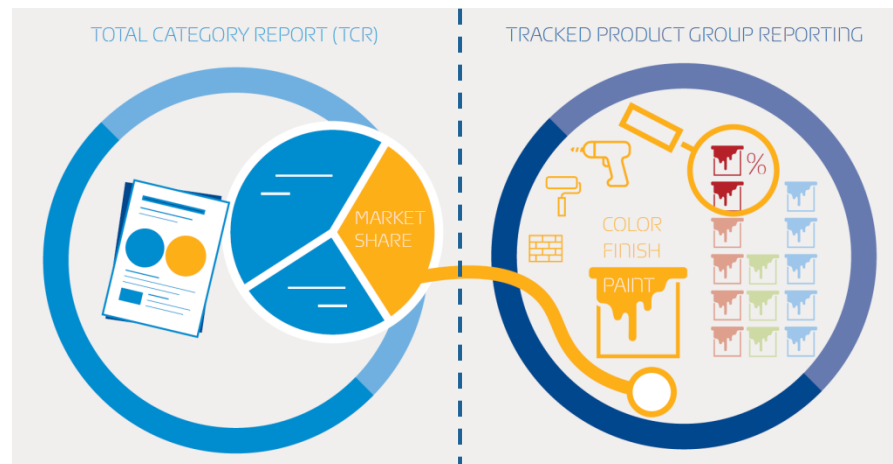
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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](mailto: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)

# Building the Industry & Building Brands from Knowledge



# Excellence in building materials supply



## BMF (Builders Merchant Federation) Forecast Report

# BMF Forecast Report

## Spring 2025 Edition

### Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Spring 2025 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](mailto:thomas.lowe@bmf.org.uk)



# Contact us

For further information



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