

Excellence in building
materials supply

Builders Merchant Building Index



Monthly report for 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 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 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:



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.

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

... continued from the previous page:

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

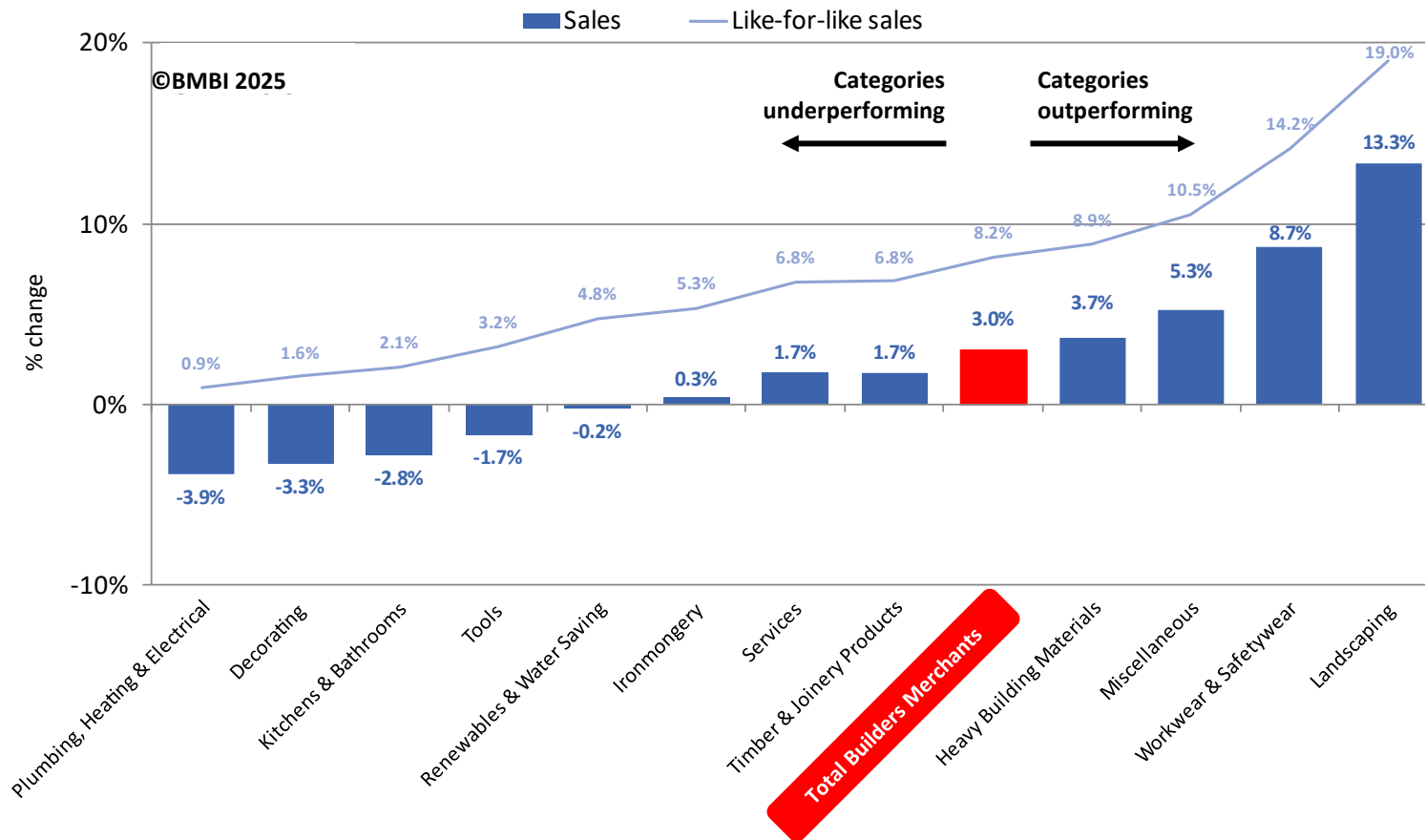
Value sales and like-for-like value sales % change

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



NIQ **GfK**

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%.

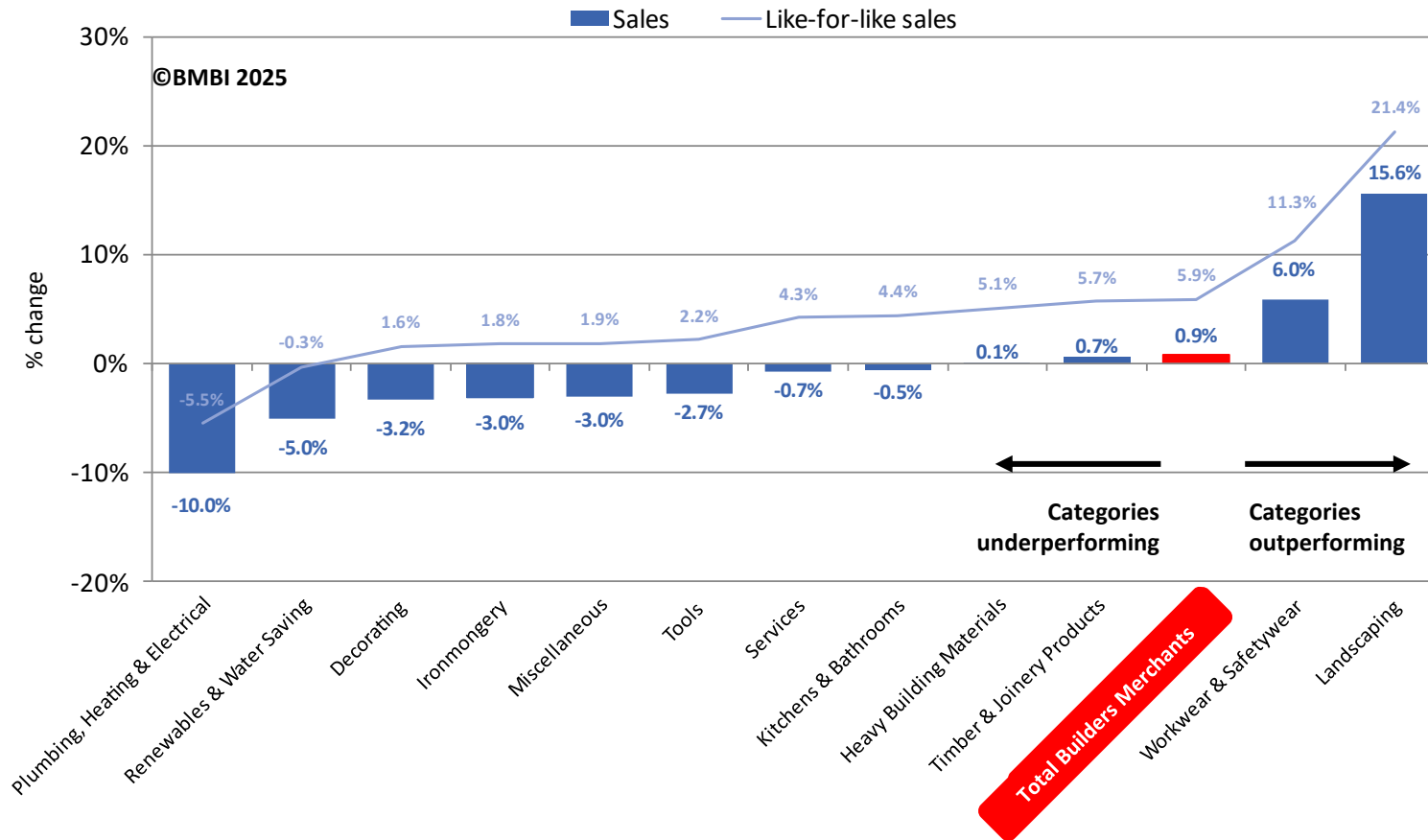
Latest month v previous month

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

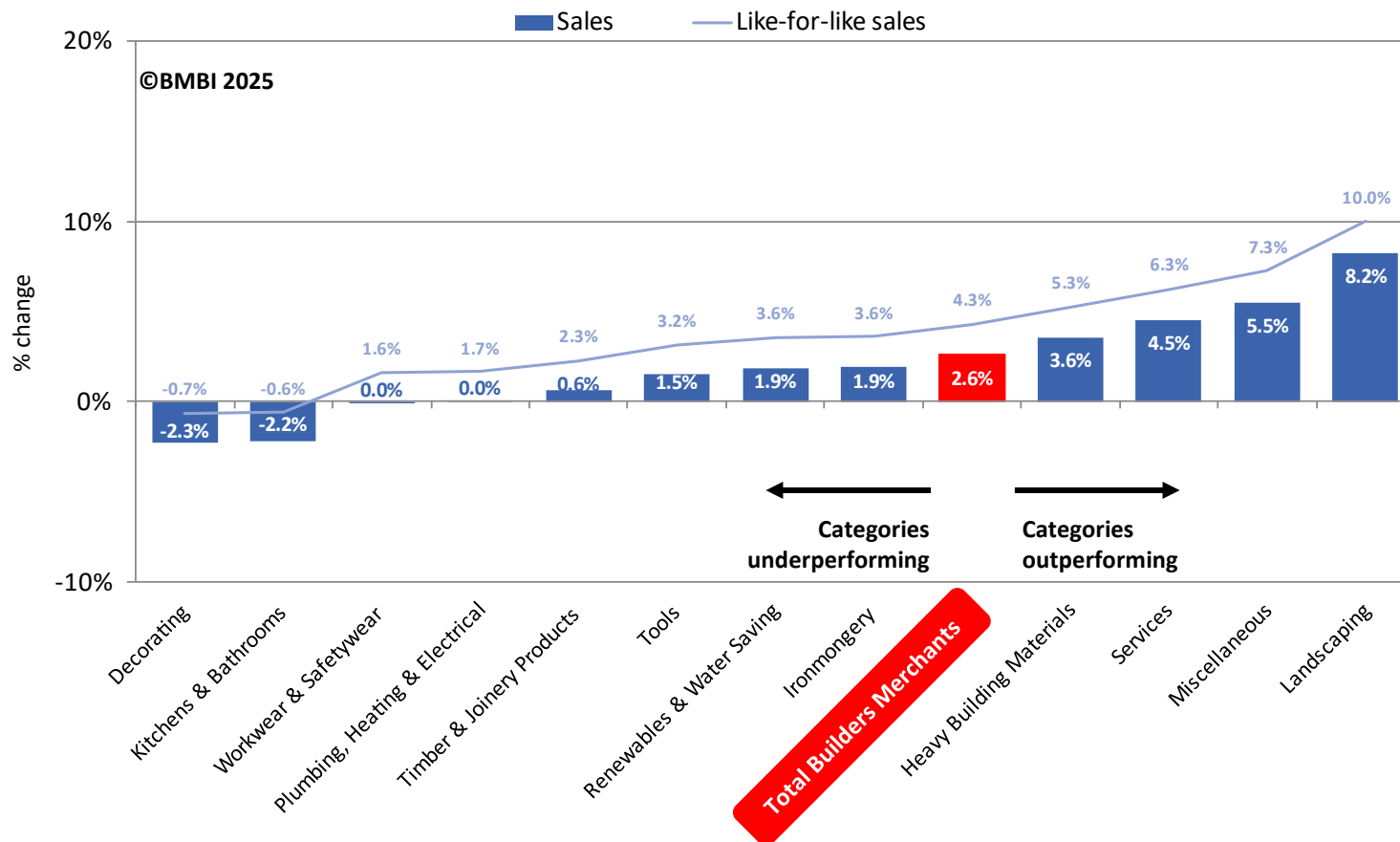
Value sales and like-for-like value sales % change

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

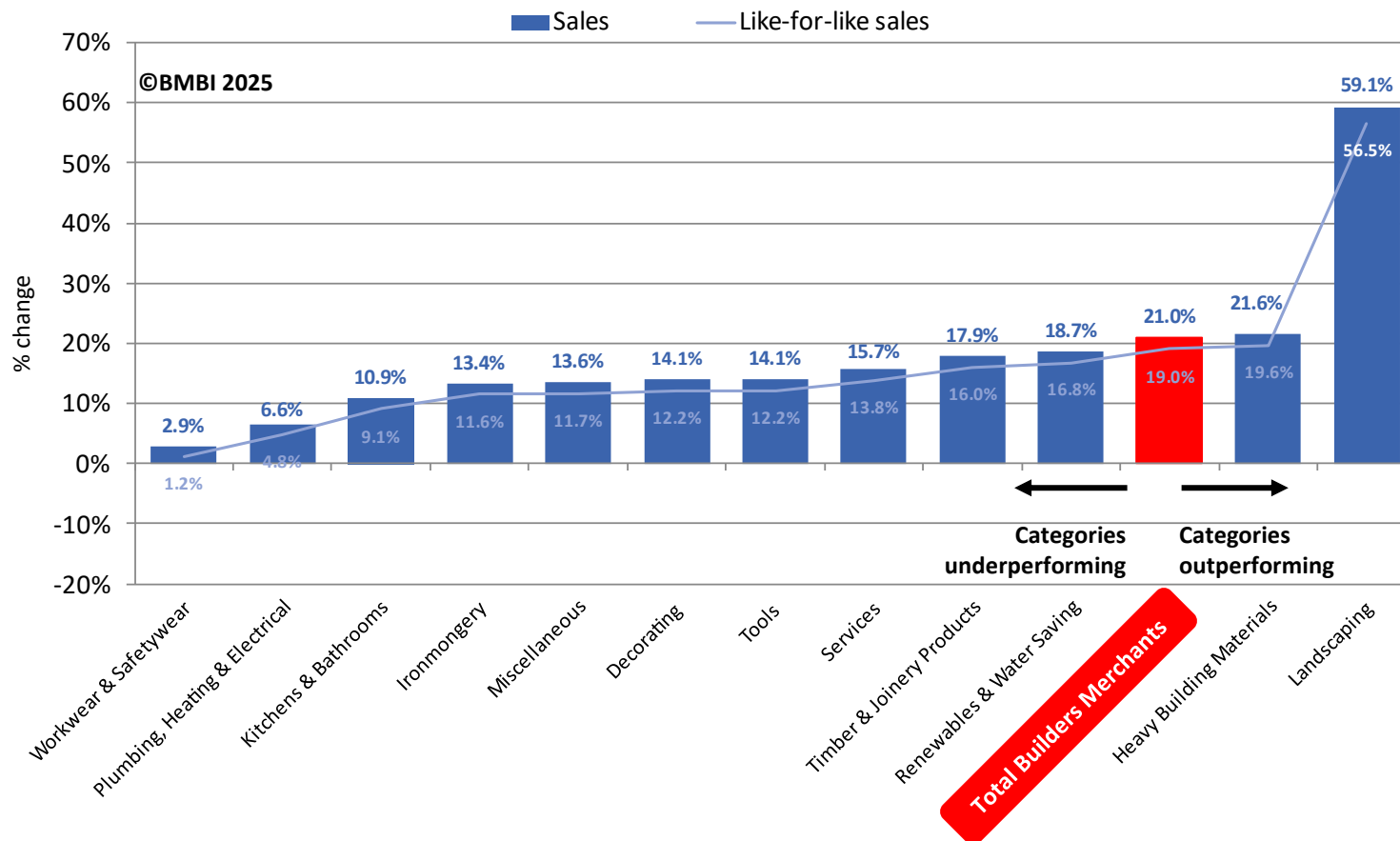
Value sales and like-for-like value sales % change

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

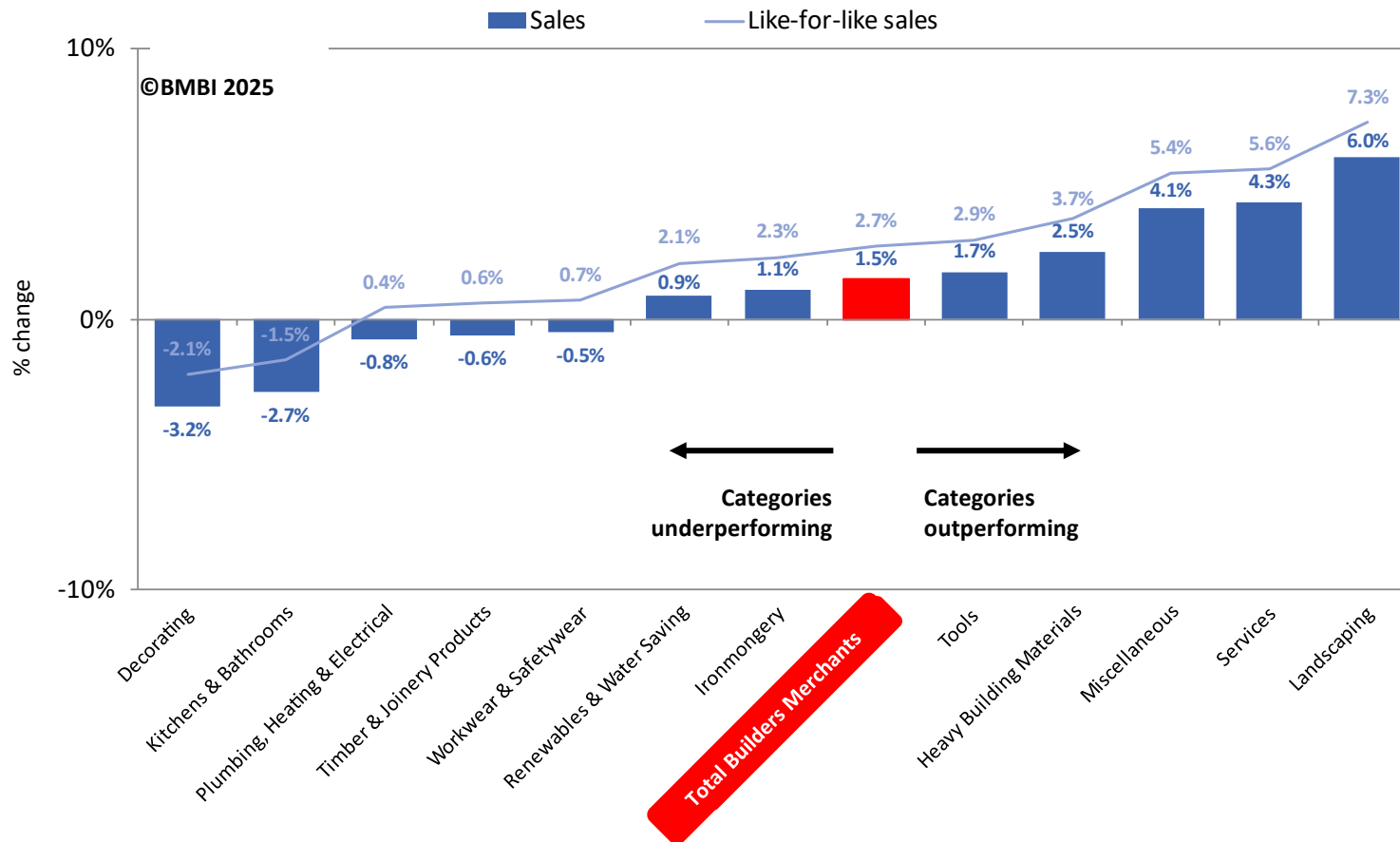
Value sales and like-for-like value sales % change

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%.

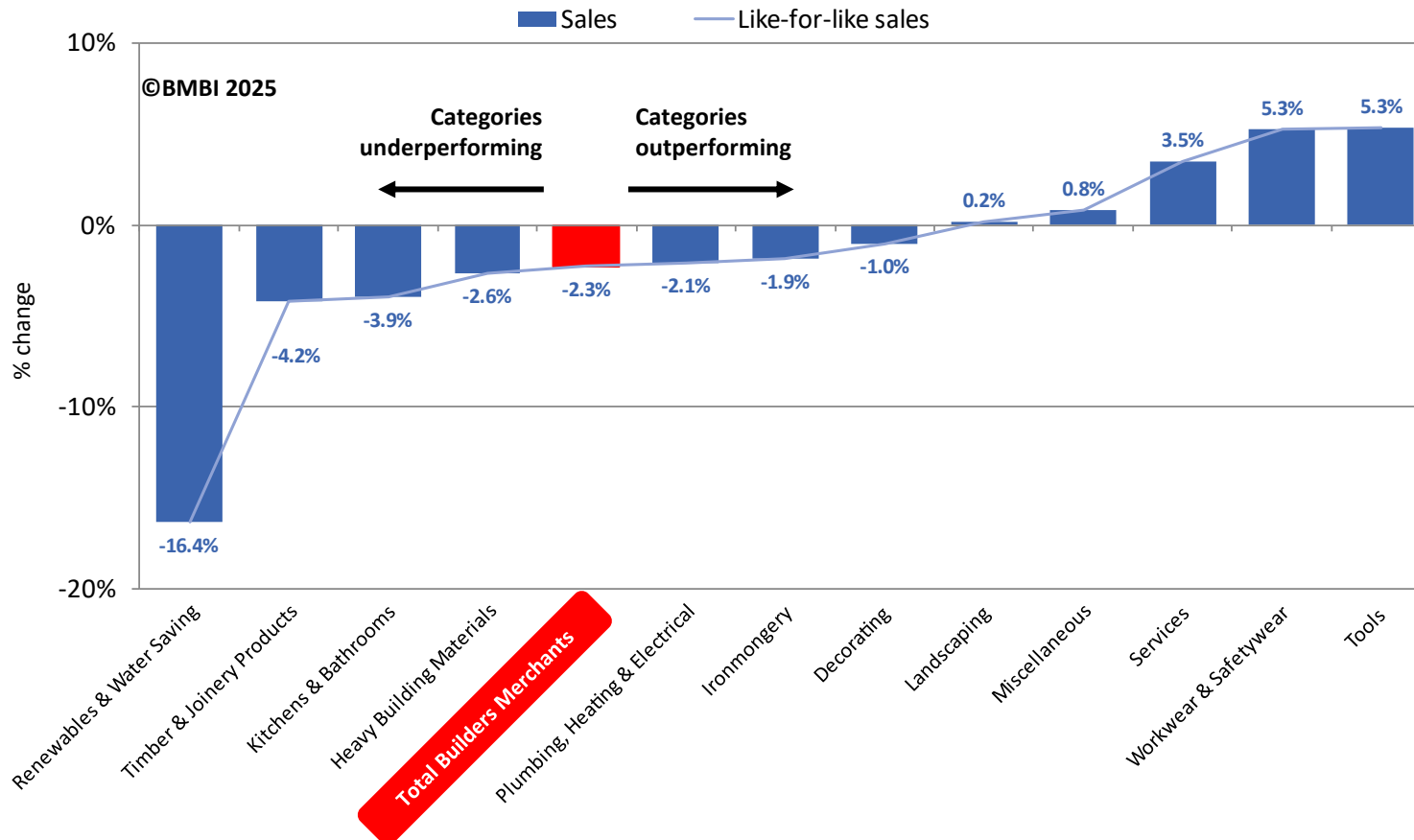
Latest 12 months v last year

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



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%.

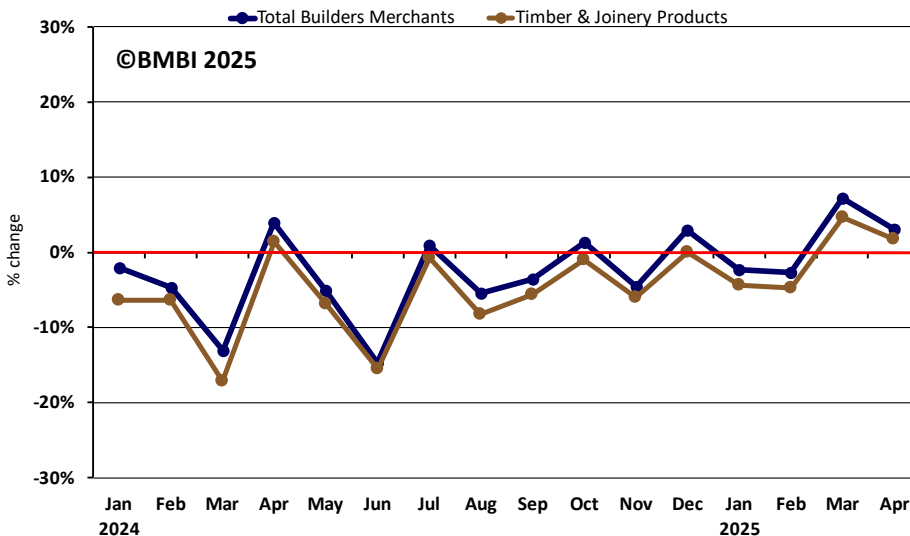
Monthly Year-on-year

Value sales % change

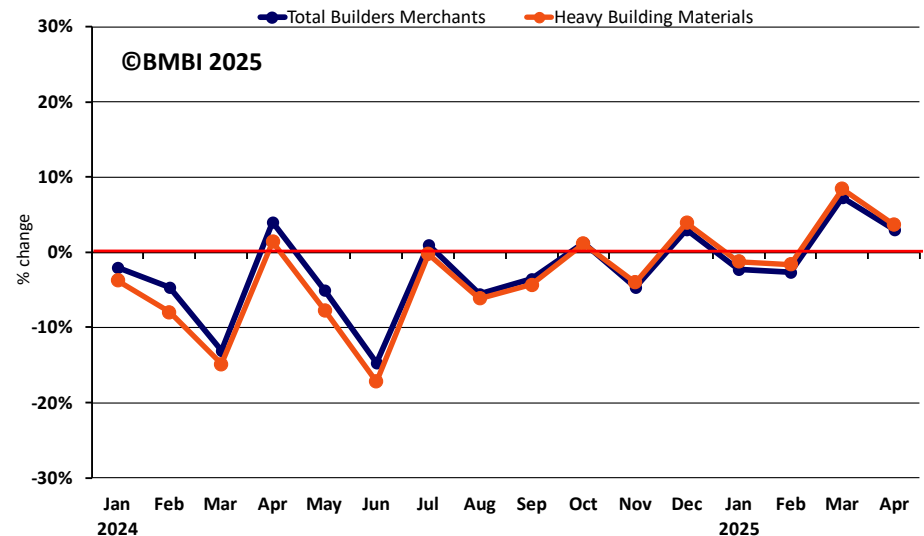
April 2025



Timber & Joinery Products - Monthly



Heavy Building Materials - Monthly



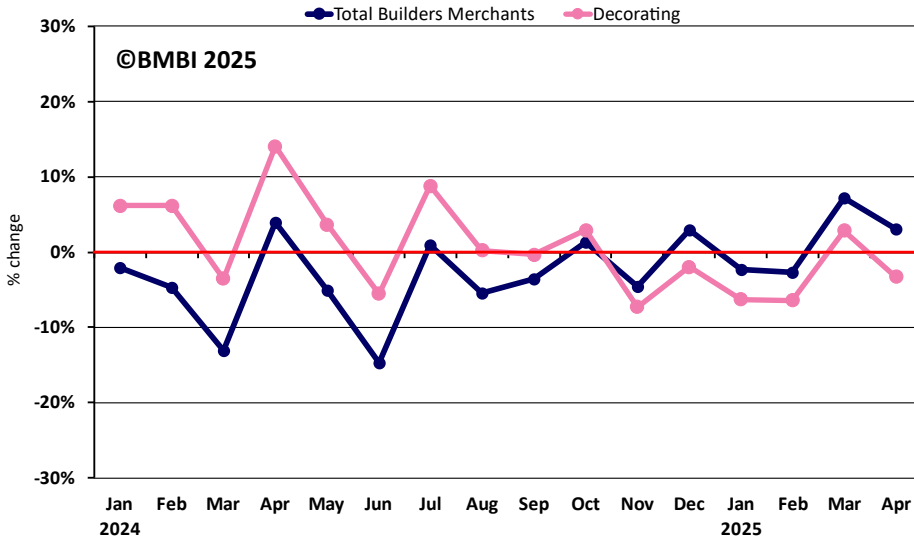
Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Monthly Year-on-year

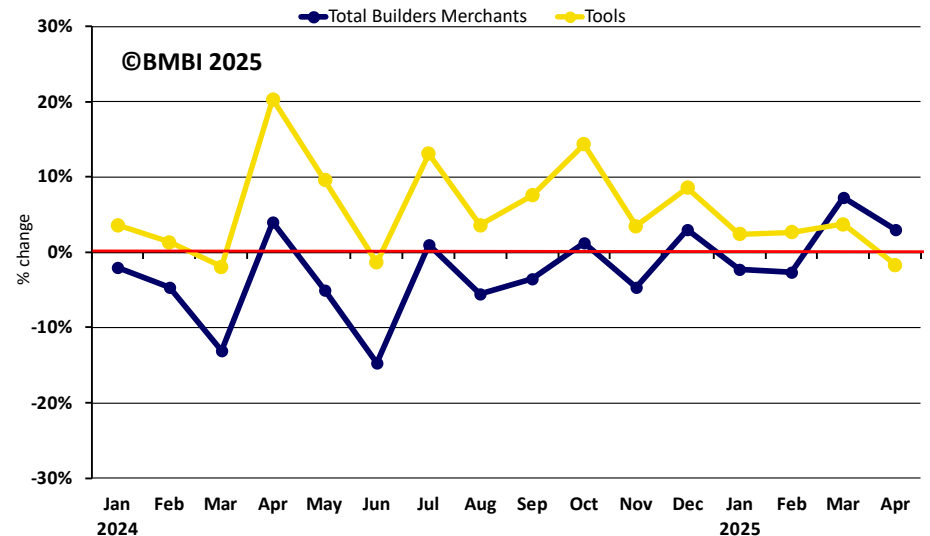
Value sales % change

April 2025

Decorating - Monthly



Tools - Monthly

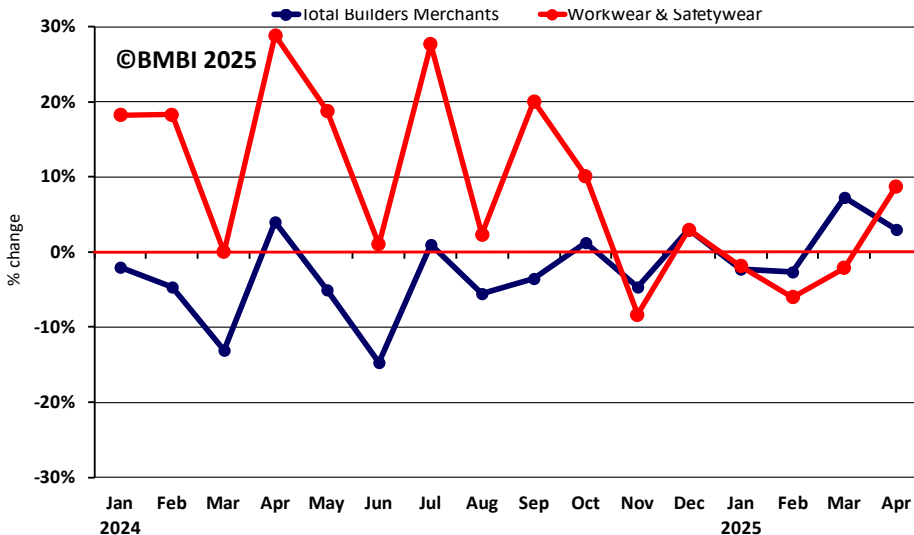


Monthly Year-on-year

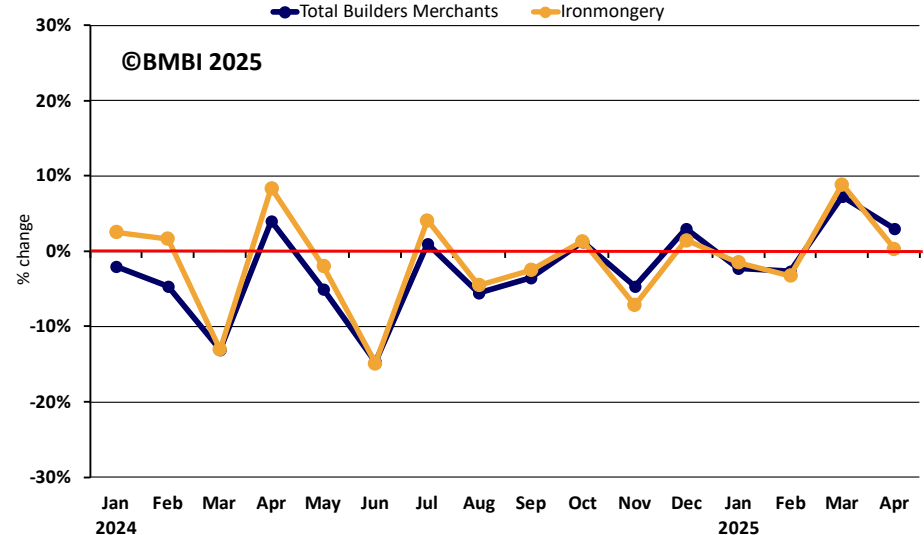
Value sales % change

April 2025

Workwear & Safetywear - Monthly



Ironmongery - Monthly



Monthly Year-on-year

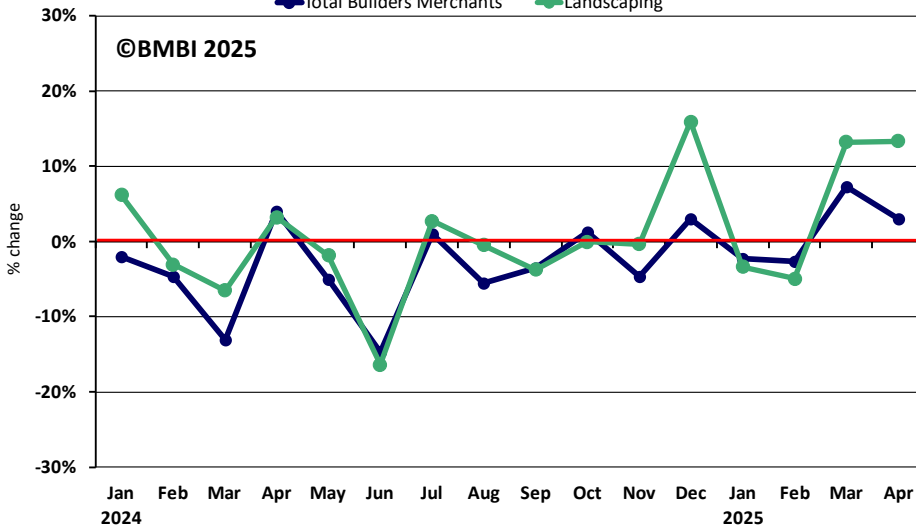
Value sales % change

April 2025

Landscaping - Monthly

● Total Builders Merchants ● Landscaping

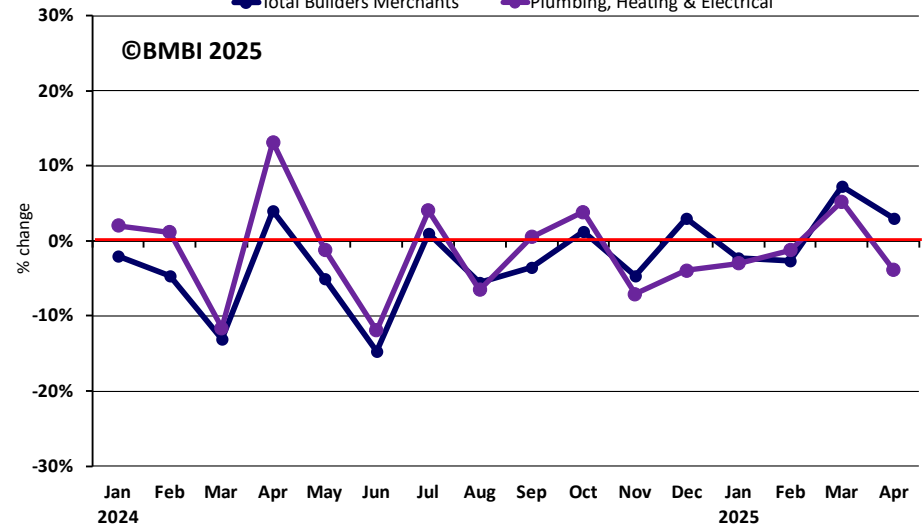
©BMBI 2025



Plumbing Heating & Electrical - Monthly

● Total Builders Merchants ● Plumbing, Heating & Electrical

©BMBI 2025



Monthly Year-on-year

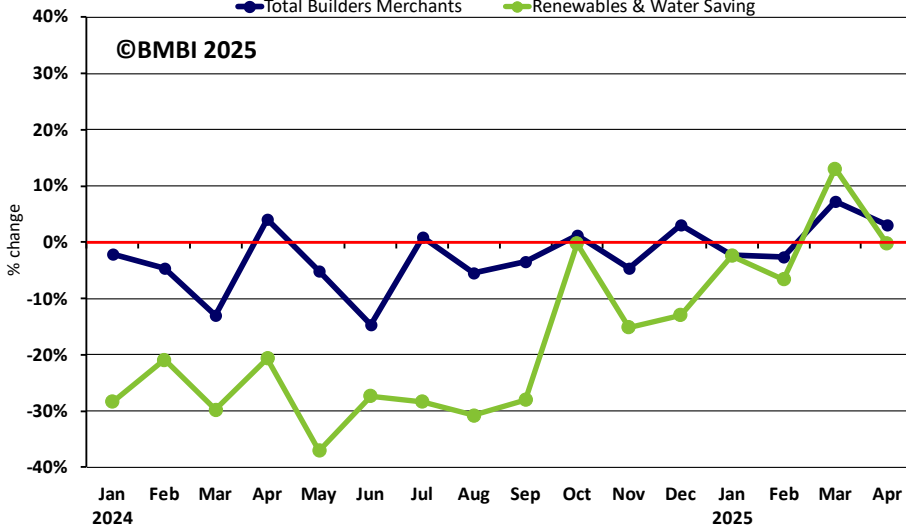
Value sales % change

April 2025

Renewables & Water Saving - Monthly

■ Total Builders Merchants ■ Renewables & Water Saving

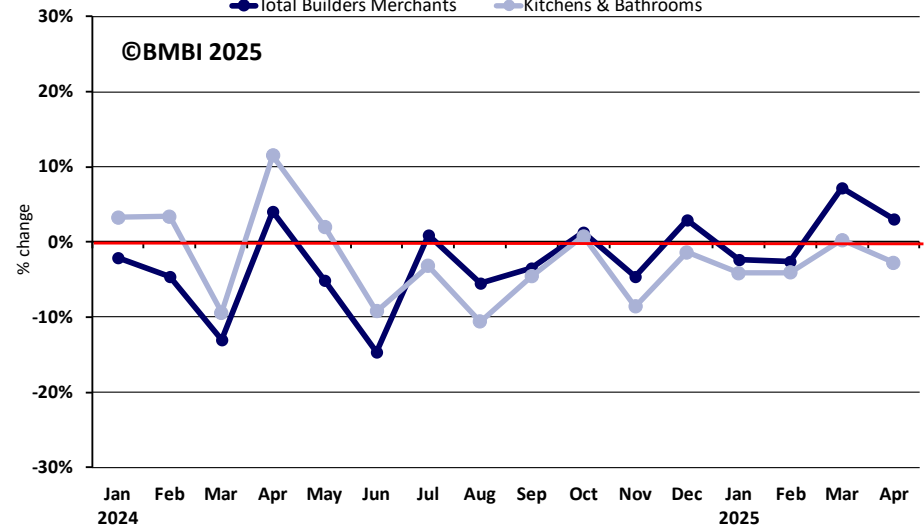
©BMBI 2025



Kitchens & Bathrooms - Monthly

■ Total Builders Merchants ■ Kitchens & Bathrooms

©BMBI 2025

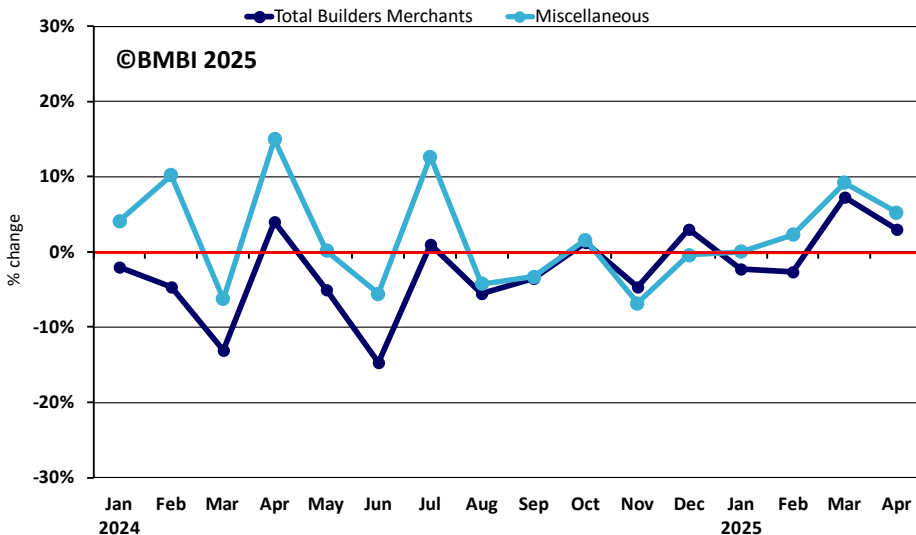


Monthly Year-on-year

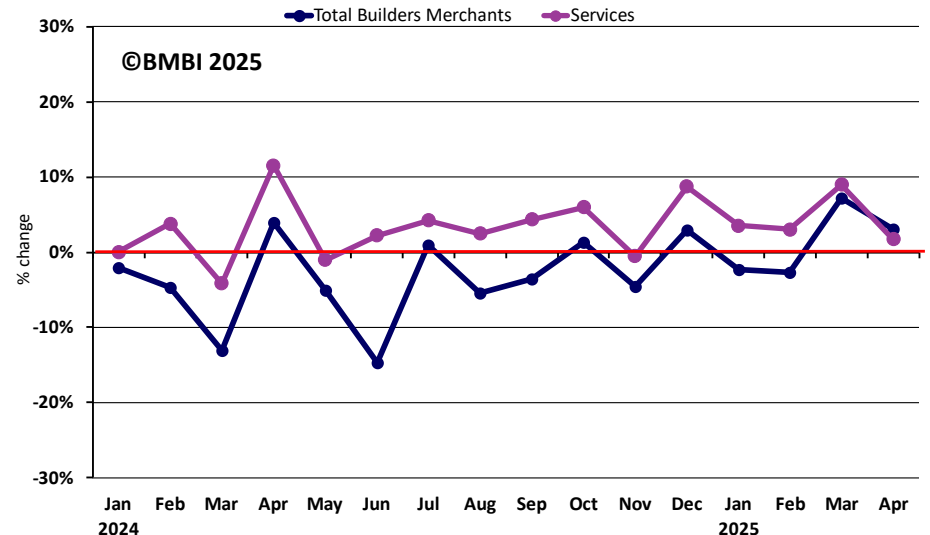
Value sales % change

April 2025

Miscellaneous - Monthly



Services - Monthly



Monthly: Index by Categories

April 2024* - April 2025

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



		2024									2025			
MONTHLY SALES VALUE INDEX	Index	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr
Total Builders Merchants	100	117.7	121.2	113.9	127.1	116.8	114.9	123.2	110.9	74.8	100.2	104.6	120.2	121.2
Timber & Joinery Products	100	109.1	110.9	104.6	117.7	109.0	108.4	116.4	105.0	69.6	95.6	97.5	110.2	110.9
Heavy Building Materials	100	118.0	122.4	115.5	130.2	119.5	117.6	126.3	113.2	74.4	100.8	106.3	122.2	122.3
Decorating	100	122.9	124.2	119.3	132.8	122.9	120.8	131.5	118.4	82.0	107.4	109.3	122.9	118.9
Tools	100	118.7	116.5	110.2	121.2	111.2	113.8	128.9	116.5	80.4	106.6	109.8	119.9	116.7
Workwear & Safetywear	100	131.8	135.5	118.4	141.8	121.0	148.3	162.2	149.7	105.2	145.4	133.3	135.2	143.3
Ironmongery	100	108.2	108.2	101.3	116.7	106.7	106.4	116.2	104.4	75.0	103.9	101.0	111.9	108.5
Landscaping	100	139.5	157.1	143.2	148.0	134.3	116.9	113.5	97.1	65.3	82.8	95.3	136.8	158.1
Plumbing, Heating & Electrical	100	113.8	107.2	98.9	114.3	102.8	112.7	130.0	120.9	87.9	118.8	118.4	121.5	109.3
Renewables & Water Saving	100	130.8	106.8	112.6	128.0	113.5	111.5	148.6	123.2	86.7	116.1	118.9	137.4	130.5
Kitchens & Bathrooms	100	119.1	118.5	112.1	121.1	110.8	117.5	124.4	121.2	81.1	108.7	112.8	116.4	115.7
Miscellaneous	100	101.4	101.5	96.3	112.4	99.7	96.6	112.0	102.8	76.0	105.6	106.3	110.0	106.7
Services	100	119.6	118.9	112.6	127.6	122.0	113.9	125.4	112.6	90.0	102.1	108.3	122.4	121.6

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



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

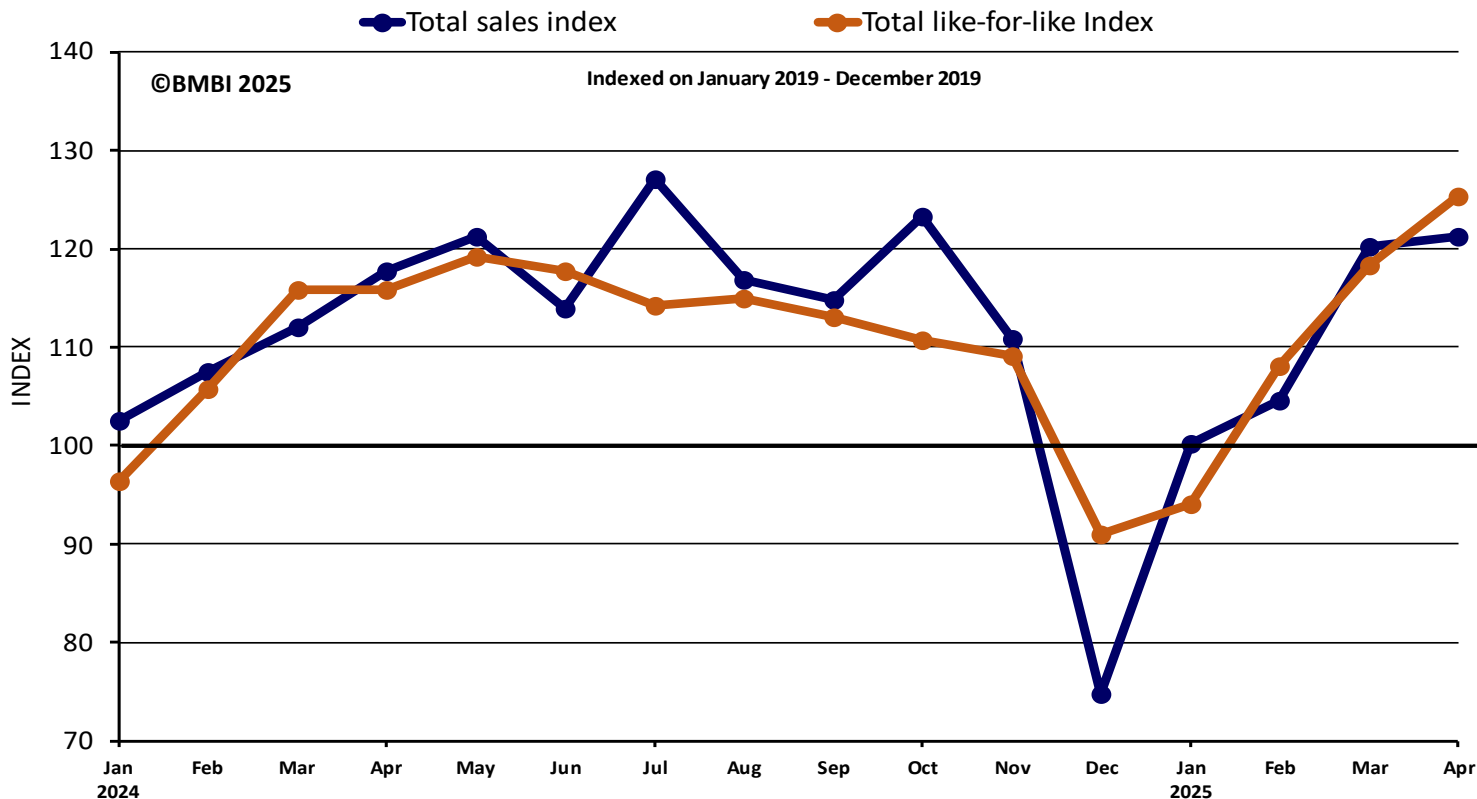
Monthly: Index

Value sales and like-for-like value sales index

There were 20 trading days in April 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



NIQ **GfK**

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

April's overall BMBI
index was 121.2.

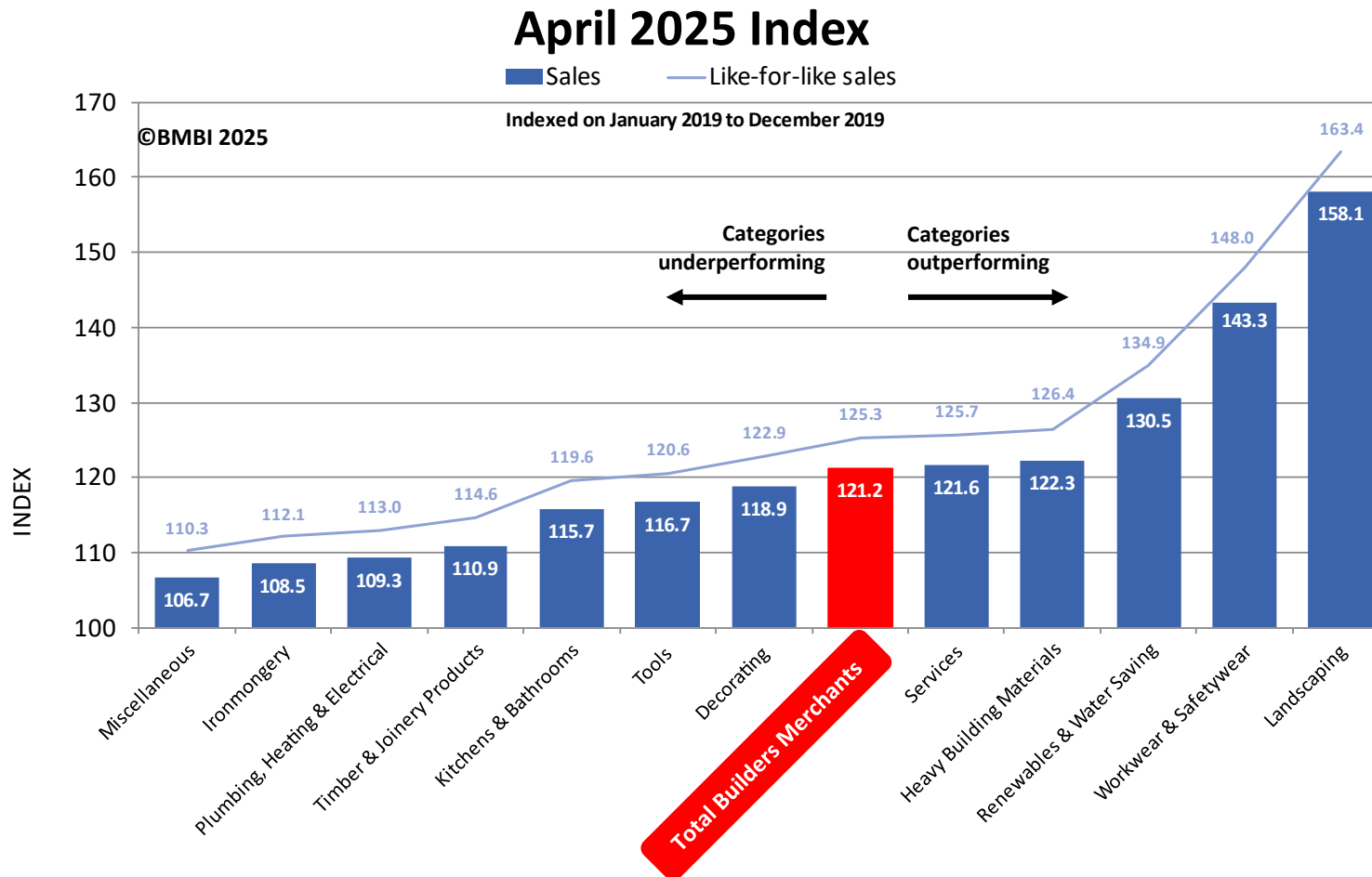
With one less trading
day this month
versus the Index
base period, the like-
for-like value sales
index was 125.3.

Latest month: Index by Categories

Value sales and like-for-like value sales index

There were 20 trading days in April 2025 vs the Index base period (21).

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



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

Seasonal category
Landscaping (158.1)
indexed the most,
followed by
Workwear &
Safetywear (143.3)
and Renewables
& Water
Saving (130.5).

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:

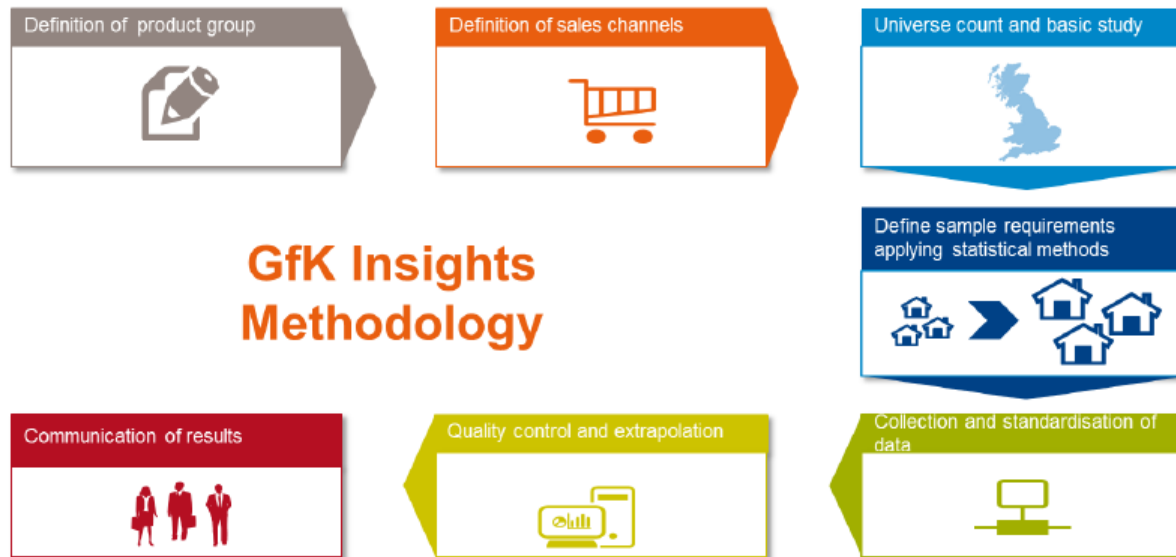
- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end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

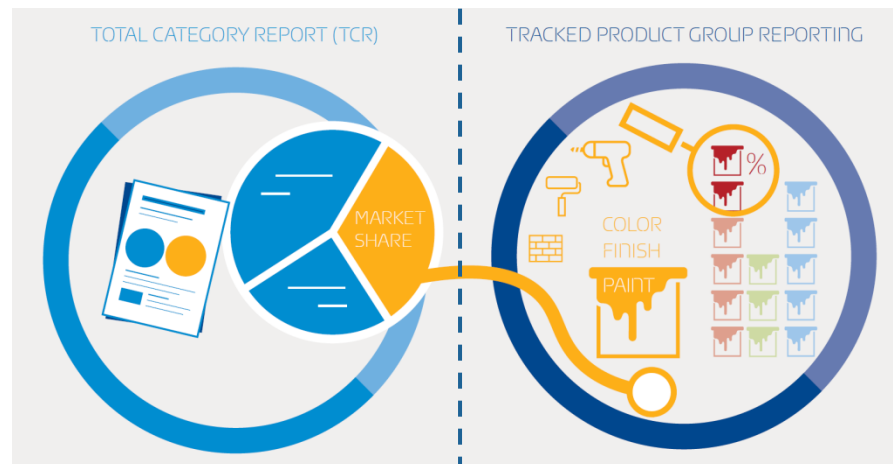
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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

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



Building the Industry & Building Brands from Knowledge



Contact us

For further information



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