

Excellence in building
materials supply

Builders Merchant Building Index



Executive Summary - May 2025

(Published 25 July 2025)

Highlights

BMBI Report May 2025 Highlights (unadjusted for trading days)

0.0%



Latest month v last year
May 2025 value sales flat (0.0%)
on May 2024

+3.3%



Latest three months v last year
Mar 2025 - May 2025 value sales up +3.3%
on Mar 2024 - May 2024

+1.2%



Year-to-date
Jan 2025 - May 2025 value sales up +1.2%
on Jan 2024 - May 2024



Latest 12 month v last year
Jun 2024 - May 2025 value sales down -1.8%
on Jun 2023 - May 2024

-1.8%

“ Total Builders Merchants value sales were flat (0.0%) in May 2025 compared with the same month last year. Total Builders Merchants volume sales were up +2.1% but prices were down -2.1%. ”

© BMBI 2025

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 May [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.

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:



Jamie Barber
UK&I Sales Director Trade
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

May 2025 value sales were flat (+0.0%) compared with May last year

Total Builders Merchants value sales were flat (0.0%) in May 2025 compared with the same month last year. Total Builders Merchants volume sales were up +2.1% but prices were down -2.1%. Looking at value sales by category, five of the twelve categories sold more: Renewables & Water Saving (+23.4%), Miscellaneous (+3.8%), Landscaping (+1.9%), Timber & Joinery Products (+1.4%) and Services (+1.0%). Heavy Building Materials (-0.4%) was less than Total Builders Merchants. Workwear & Safetywear (-7.0%) was weakest. With one less trading day however, like-for-like value sales (which take trading day differences into account) were up +5.0%.

May 2025 v April 2025

Total Builders Merchants value sales were unchanged (0.0%) in May compared with April 2025. Total Builders Merchants volume sales were up +1.0% but prices were down -1.0%. Looking at value sales by category, four of the twelve categories sold more: Timber & Joinery Products (+1.4%), Decorating and Landscaping (both +1.3%) and Renewables & Water Saving (+0.9%). Workwear & Safetywear (-12.0%) was weakest. The largest category, Heavy Building Materials was -0.3%, and below Total Builders Merchants. There was no difference in trading days.

May Index:

May's overall BMBI index was 121.2. All categories exceeded 100. Seasonal category Landscaping (160.2) indexed the most, followed by Renewables & Water Saving (131.7) and Workwear & Safetywear (126.0). Ironmongery (108.1), Plumbing Heating & Electrical (106.9) and Miscellaneous (105.3) 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: March - May 2025 v March - May 2024

Total Builders Merchants value sales in March to May were +3.3% higher than the same period last year. Total Builders Merchants volume sales were up +5.4% but prices were down -2.0%. Looking at value sales by category, nine of the twelve categories sold more, with Renewables & Water Saving (+11.3%), Landscaping (+9.0%), Miscellaneous (+6.1%), Heavy Building Materials and Services (both +3.8%) also performing better than Total Merchants. Decorating (-1.2%) and Kitchens & Bathrooms (-2.4%) were the weakest performing categories. With one less trading day this period, like-for-like value sales were up +5.0%.

Overview continues on the next page...

Total Builders Merchants value sales in March to May 2025 were +3.3% higher than the same period last year.

Total Builders Merchants volume sales were up +5.4% but prices were down -2.0%.

Overview - 2

... continued from the previous page:

Latest three months v previous three months: March - May 2025 v December 2024 - February 2025

Total Builders Merchants value sales in the three months March to May were +29.7% more than in December 2024 to February 2025. Total Builders Merchants volume sales were up +34.5 but prices down -3.6%. All categories sold more. Looking at value sales by category, seasonal category Landscaping (+87.0%) and Heavy Building Materials (+30.2%) increased the most. Workwear & Safetywear (+5.3%) and Plumbing Heating & Electrical (+3.9%) were weakest. With two more trading days this period, like-for-like value sales were +25.4% higher.

Year-to-date: January to May 2025 v January to May 2024

Total Builders Merchants value sales in the five months January to May were +1.2% higher than in January to May 2024. Total Builders Merchants volume sales were up +3.4% but prices down -2.2%. Looking at value sales by category, five categories performed better than Total Builders Merchants: Landscaping (+4.9%), Renewables & Water Saving (+4.8%), Miscellaneous (+4.1%), Services (+3.6%) and Heavy Building Materials (+1.9%). Kitchens & Bathrooms (-3.1%) and Decorating (-3.2%) were weakest. Timber & Joinery Products was down -0.2% With two less trading days this period, like-for-like value sales were up +3.1%.

Latest 12 months v last year: June 2024 - May 2025 v June 2023 - May 2024

Total Builders Merchants value sales in the last 12 months, June 2024 to May 2025, were -1.8% down on the previous period, June 2023 to May 2024. Total Builders Merchants volume sales were -0.6% down with prices down -1.2%. Looking at value sales by category, five of the twelve categories sold more with Tools (+4.4%) up the most, followed by Services (+3.7%), Workwear & Safetywear (+3.3%), Miscellaneous (+1.1%) and Landscaping (+0.6%). The two largest categories Heavy Building Materials (-2.0%) and Timber & Joinery Products (-3.5%) declined more than Total Builders Merchants. Renewables & Water Saving (-11.7%) was weakest. With two less trading days this period, like-for-like value sales were down -1.0%.

Total Builders Merchants value sales in the last 12 months, June 2024 to May 2025, were -1.8% down on the previous period, June 2023 to May 2024.

Total Builders Merchants volume sales were -0.6% down with prices down -1.2%.

Latest month v last year

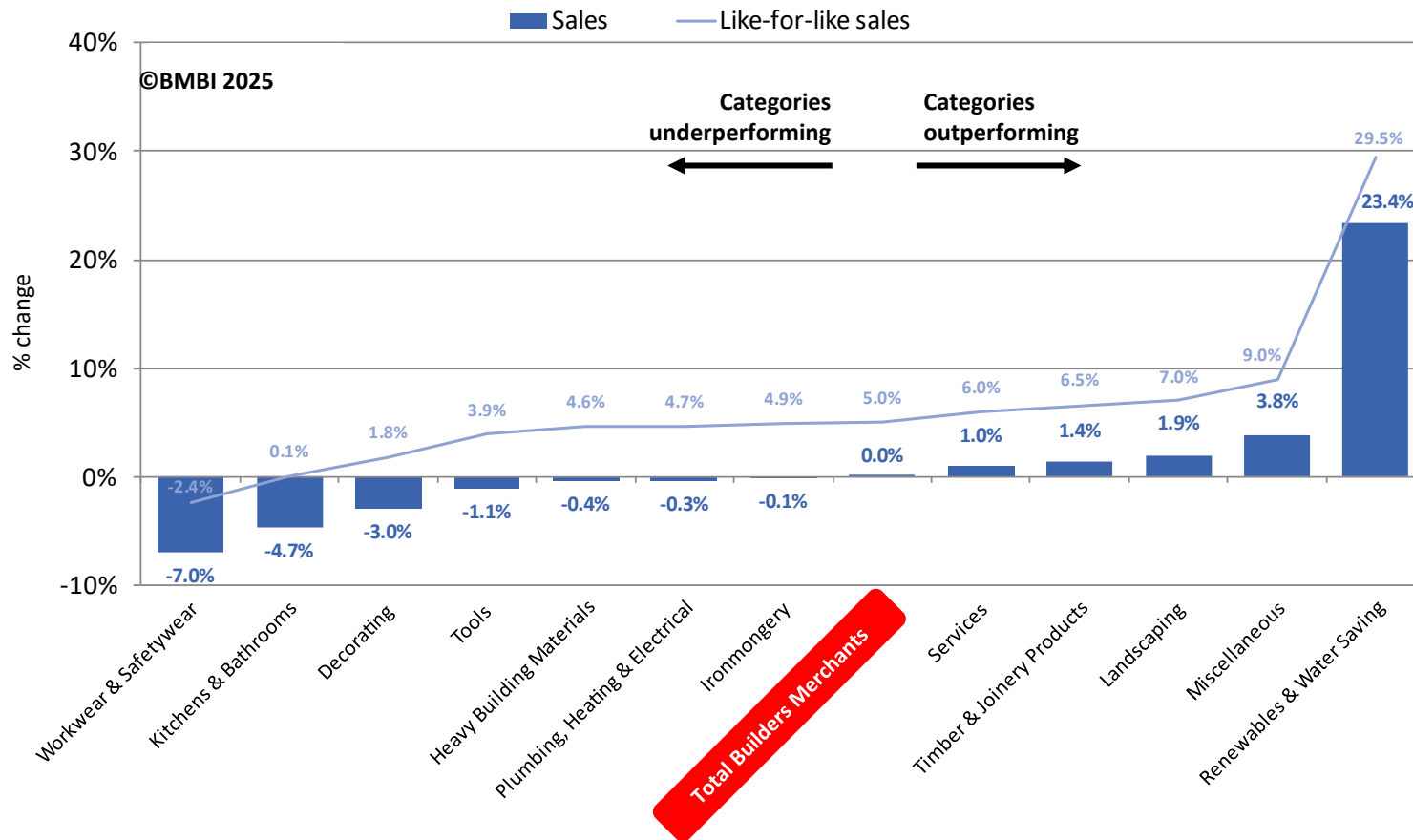
Value sales and like-for-like value sales % change

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

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



May 2025 v May 2024



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

Total Builders Merchants value sales were flat (0.0%) in May 2025 compared with the same month last year.

Total Builders Merchants volume sales were up +2.1% but prices were down -2.1%.

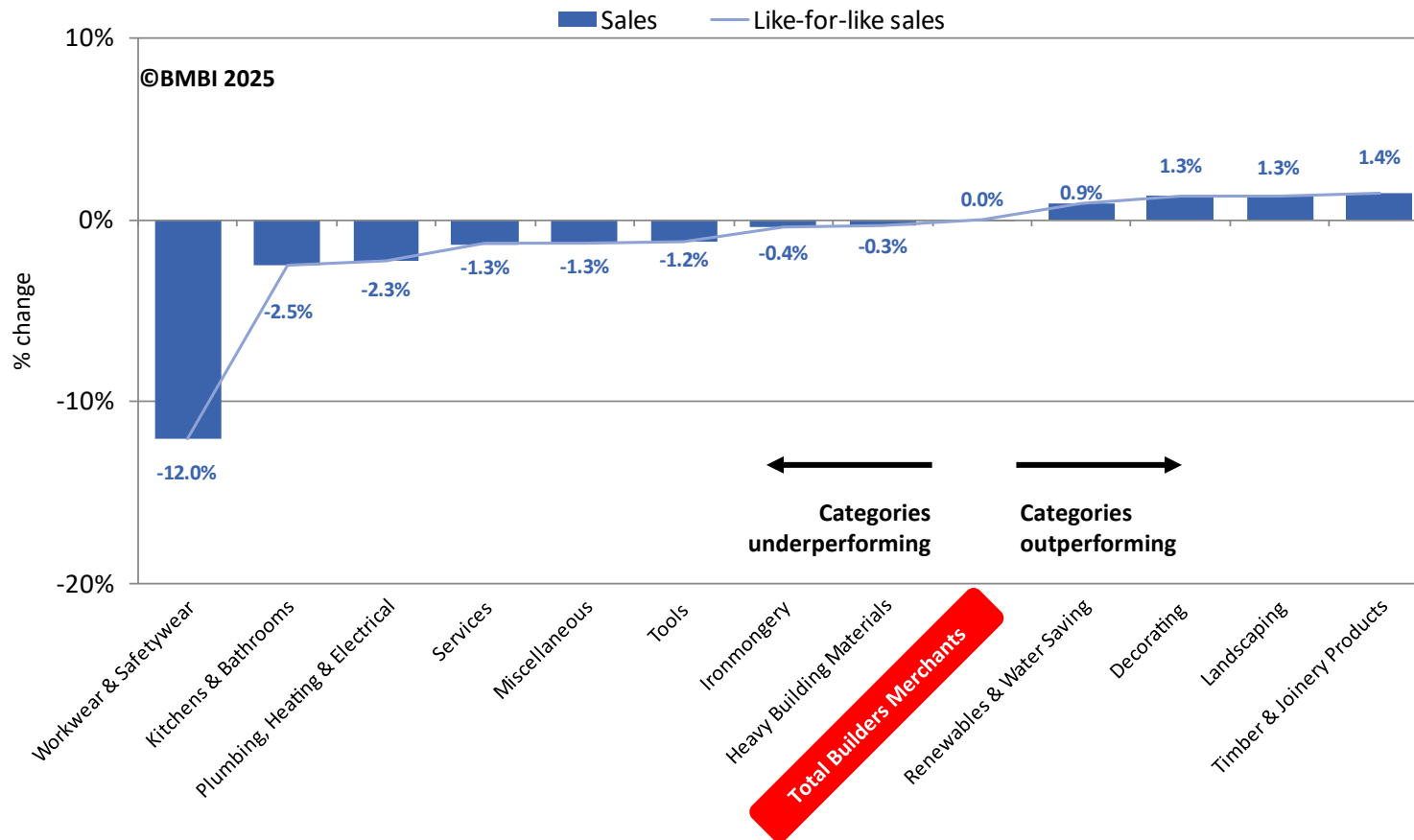
Latest month v previous month

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

There was no difference in trading days (20).
Like-for-like sales take trading day differences into account.



May 2025 v April 2025



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

Total Builders Merchants value sales were unchanged (0.0%) in May compared with April 2025.

Total Builders Merchants volume sales were up +1.0% but prices were down -1.0%.

Latest 3 months v last year

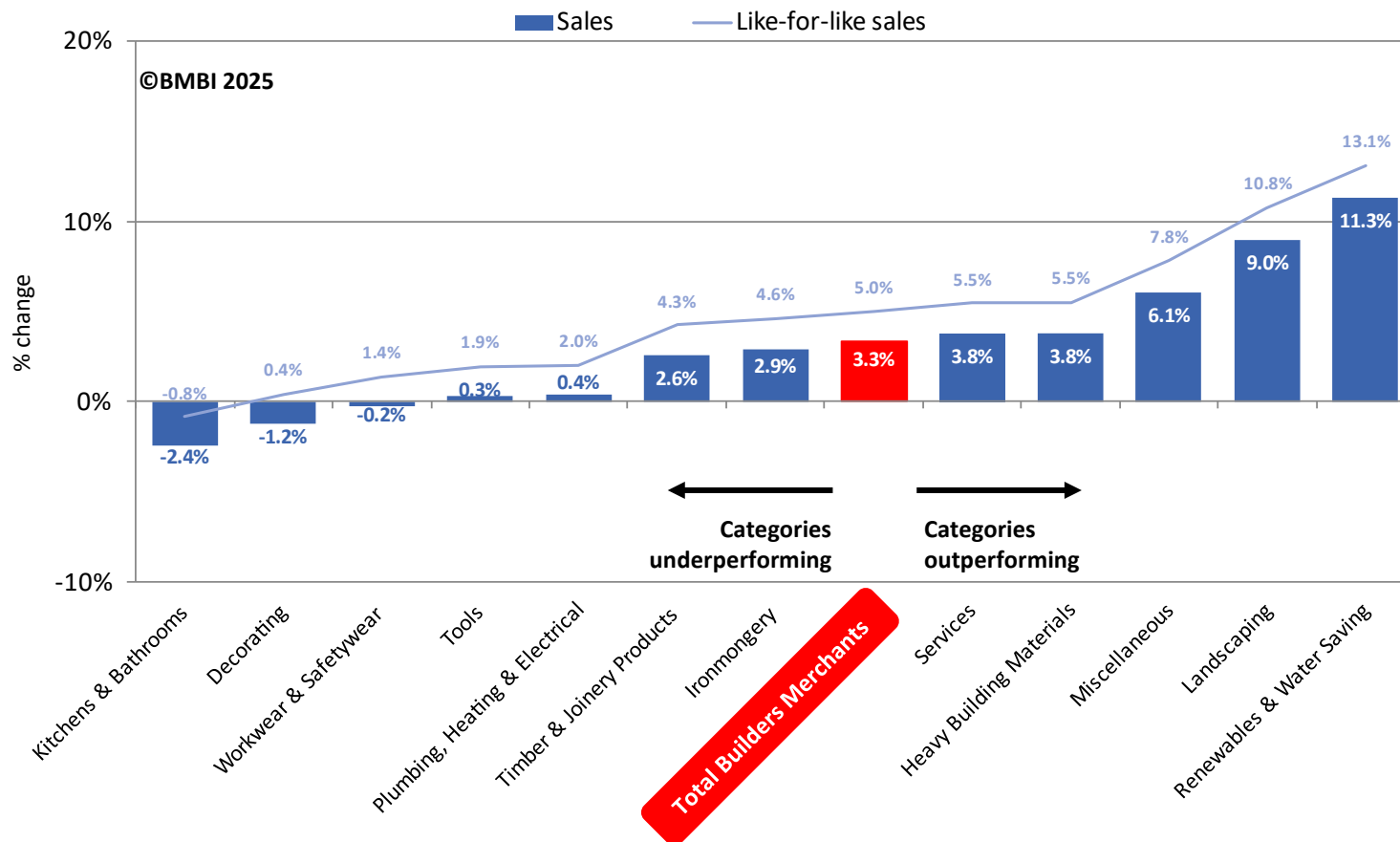
Value sales and like-for-like value sales % change

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 Mar 25 to May 25 v Mar 24 to May 24



NIQ **GfK**

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

Total Builders Merchants value sales in March to May 2025 were +3.3% higher than the same period last year.

Total Builders Merchants volume sales were up +5.4% but prices were down -2.0%.

Latest 3 months v previous 3 months

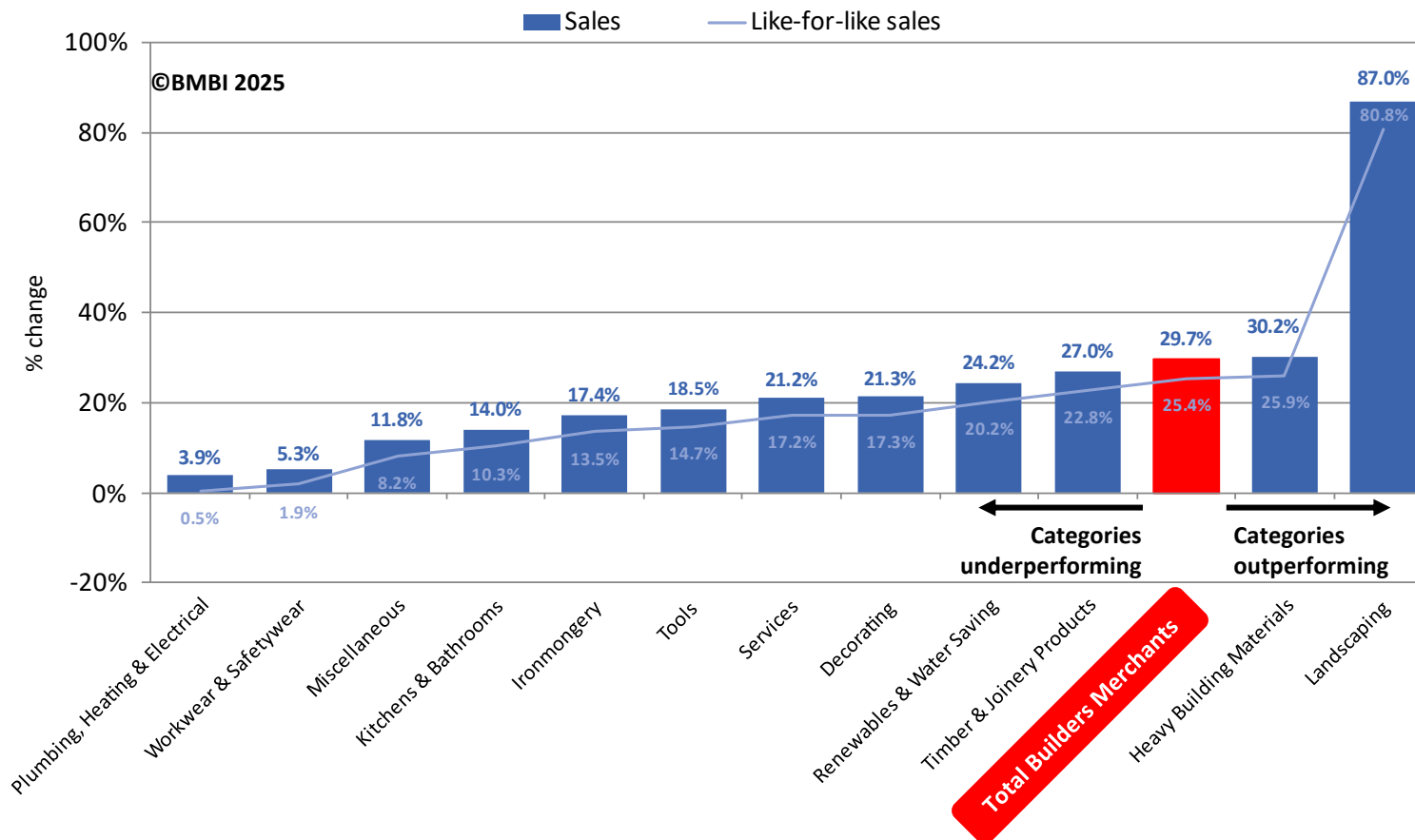
Value sales and like-for-like value sales % change

61 trading days this recent period v 59 trading days in the previous period.

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



3 months Mar 25 to May 25 v 3 months Dec 24 to Feb 25



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

Total Builders Merchants value sales in the three months March to May 2025 were +29.7% more than in December 2024 to February 2025.

Total Builders Merchants volume sales were up +34.5% but prices down -3.6%.

Year-to-date v last year

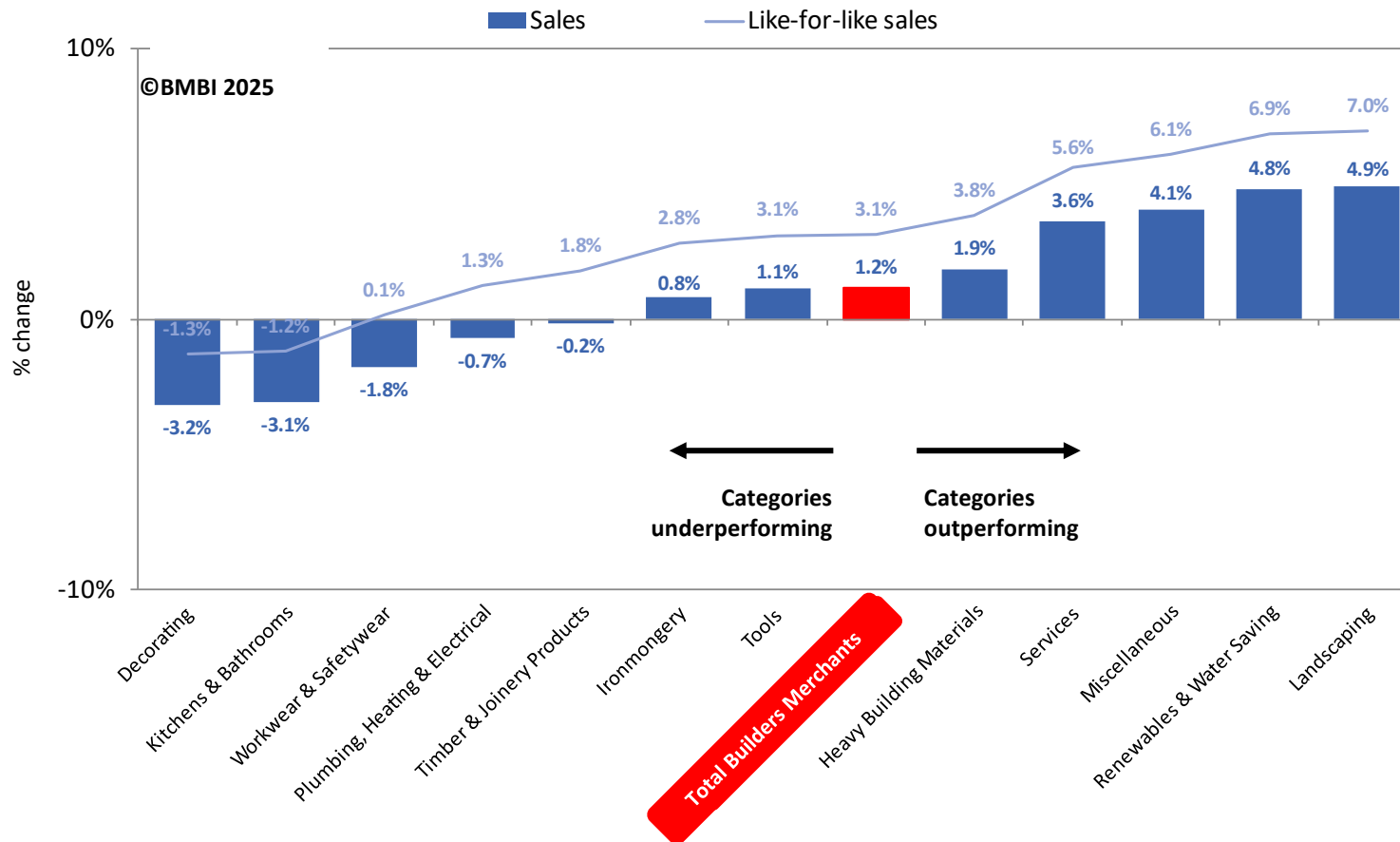
Value sales and like-for-like value sales % change

103 trading days this year v 105 trading days last year.

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



Year to date: Jan 25 to May 25 v Jan 24 v May 24



NIQ **GfK**

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

Total Builders Merchants value sales in the five months January to May 2025 were +1.2% higher than in January to May 2024.

Total Builders Merchants volume sales were up +3.4% but prices down -2.2%.

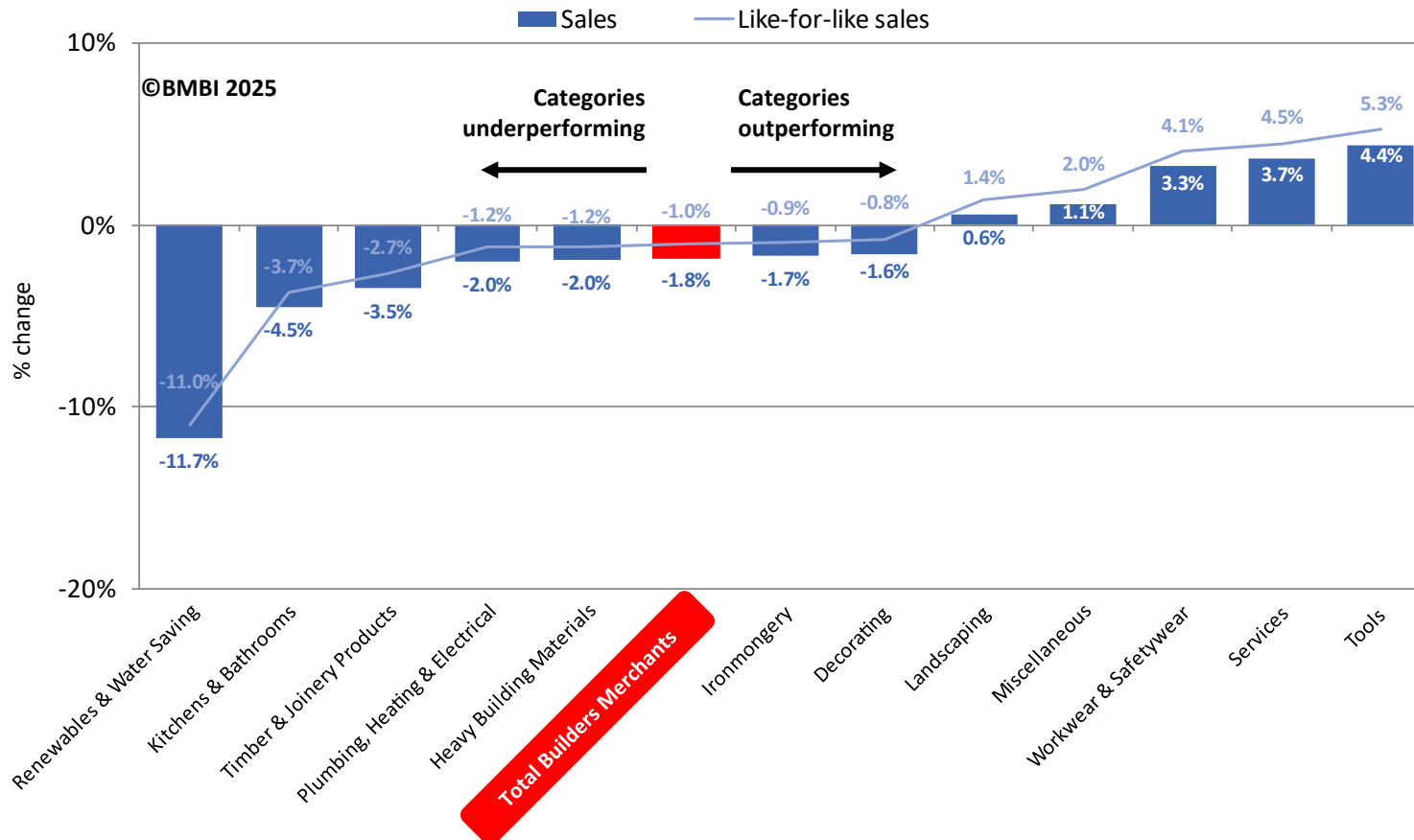
Latest 12 months v last year

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

249 trading days in the latest period v 251 trading days last year.
Like-for-like sales take trading day differences into account.



12 months Jun 24 to May 25 v 12 months Jun 23 to May 24



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

Total Builders Merchants value sales in the last 12 months, June 2024 to May 2025, were -1.8% down on the previous period, June 2023 to May 2024.

Total Builders Merchants volume sales were -0.6% down with prices down -1.2%.

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	20							

Quarterly

Index: 62

2023			
Q1	Q2	Q3	Q4
64	60	64	60
2024			
Q1	Q2	Q3	Q4
63	62	65	61
2025			
Q1	Q2	Q3	Q4
63			

Half Year

2023	
H1	H2
124	124
2024	
H1	H2
125	126
2025	
H1	H2

Full Year

2023
248
2024
251
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'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

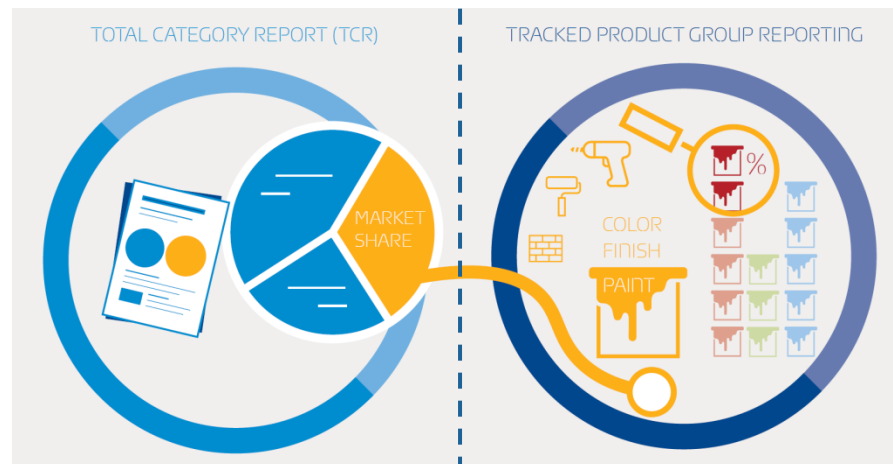
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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)

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



Contact us

For further information



Emile van der Ryst

Key Account Manager - Trade & DIY

emile.vanderryst@nielseniq.com

+44 (0) 20 7890 9615



Thomas Lowe

Industry Analyst / Economist

thomas.lowe@bmf.org.uk

+44 (0) 24 7685 4994



Mike Rigby

CEO - MRA Research

mike@mra-research.co.uk

+44 (0) 1453 521621