

Excellence in building
materials supply

Builders Merchant Building Index



Executive Summary - July 2025

(Published 01 October 2025)

Highlights

BMBI Report July 2025 Highlights

(unadjusted for trading days)

www.bmbi.co.uk

+0.1%



Latest month v last year

Jul 2025 total value sales up +0.1%
on Jul 2024

+1.8%



Latest three months v last year

May - Jul 2025 total value sales up +1.8%
on May - Jul 2024

+1.6%



Year-to-date

Jan - Jul 2025 total value sales up +1.6%
on Jan - Jul 2024

0.0%



Latest 12 months v last year

Aug 2024 - Jul 2025 total value sales flat (0.0%)
on Aug 2023 - Jul 2024

“Total Builders Merchants value sales were up +0.1% in July 2025 compared with the same month last year. Volume sales were +0.6% up but prices down -0.6%.”

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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 July [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 Q2 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: Q2 2025 Report](#)

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

[Read latest Comment: Q2 2025 Report](#)

Expert for Fasteners and Fixings:



Ian Doherty
Non-Executive Director
Hexstone and Owlett-Jaton

[Read latest Comment: Q2 2025 Report](#)

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q2 2025 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q2 2025 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q2 2025 Report](#)

The Expert Panel

Speaking for their markets - 2

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Heidelberg Materials

[Read latest Comment: Q2 2025 Report](#)

Expert for Paint:



Jamie Barber
UK&I Sales Director Trade
Dulux Trade

[Read latest Comment: Q2 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: Q2 2025 Report](#)

Expert for Plumbing & Drainage:



Chris Dawson
Sales Director
Brett Martin

[Read latest Comment: Q2 2025 Report](#)

Expert for Heating & Cooling:



Matt Williams
Managing Director
Polypipe

[Read latest Comment: Q2 2025 Report](#)

Expert for Softwoods and Engineered Wood:



James Davenport
Managing Director
Metsä Wood UK

[Read latest Comment: Q2 2025 Report](#)

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

July 2025 value sales were up +0.1% compared with July last year

Total Builders Merchants **value** sales were up +0.1% in July 2025 compared with the same month last year. **Volume** sales were +0.6% up but **prices** down -0.6%. By **value**, eight of the twelve categories sold more, led by: Renewables & Water Saving (+3.7%), Timber & Joinery Products (+2.6%), Kitchens & Bathrooms (+1.8%) and Services (+1.7%). Heavy Building Materials (-1.1%); Decorating (-3.9%) and Workwear & Safetywear (-5.3%) were the worst performing categories. There was no difference in trading days.

July 2025 v June 2025

Total Builders Merchants **value** sales were +5.8% higher in July 2025 than in June 2025. **Volume** sales were up +5.4% and **prices** up +0.4%. By **value**, all twelve categories sold more. Miscellaneous (+11.3%), Services (+9.0%), Tools (+8.9%), Decorating (+7.4%), Timber & Joinery Products (+6.9%), Heavy Building Materials (+6.3%) and Ironmongery (+6.0%) were up the most. Landscaping (+0.6%) grew more slowly than other categories. With two more trading days this month, like-for-like **value** sales (which take trading day differences into account) were -3.4% lower.

July Index:

July's BMBI **value** index was 127.2. All twelve categories exceeded 100, with seasonal category Landscaping (145.2) indexing the most. Miscellaneous (110.9) indexed the least. With two more trading days this month versus the Index base period, the like-for-like **value** sales index was 114.3.

Latest three months v last year: May - July 2025 v May - July 2024

Total Builders Merchants **value** sales in May to July 2025 were +1.8% higher than the same period last year. **Volume** sales were up +3.0% but **prices** were down -1.2%. By **value**, ten of the twelve categories sold more, with Renewables & Water Saving (+13.3%), Timber & Joinery Products (+4.0%), Plumbing Heating & Electrical (+3.9%) and Services (+2.8%) up the most. Heavy Building Materials (+1.0%) grew less than Total Builders Merchants. Workwear & Safetywear (-1.2%) and Decorating (-2.5%) were the weakest performing categories. There was no difference in trading days.

Total Builders Merchants **value** sales in the three months May to July 2025 were +1.8% higher than the same period last year. **Volume** sales were up +3.0% but **prices** were down -1.2%.

Overview continues on the next page...

Overview - 2

... continued from the previous page:

Latest three months v previous three months: May - July 2025 v February - April 2025

Total Builders Merchants **value** sales in the three months May to July 2025 were +6.6% more than in February to April 2025. **Volume** sales were up +7.8% but **prices** down -1.1%. By **value**, eight of the twelve categories sold more. Landscaping (+16.4%) and Timber & Joinery Products (+8.8%) increased the most. Heavy Building Materials (+6.0%) grew less than Total Builders Merchants. Plumbing Heating & Electrical (-4.6%) and Workwear & Safetywear (-5.0%) were weakest. With three more trading days this period, like-for-like **value** sales were +1.6% higher.

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

Total Builders Merchants **value** sales in the seven months January to July 2025 were +1.6% higher than in January to July 2024. **Volume** sales were +3.4% up but **prices** -1.8% down. By **value**, nine of the twelve categories sold more, led by Renewables & Water Saving (+7.4%) and Landscaping (+3.9%). Heavy Building Materials (+1.8%) performed better than Total Builders Merchants, but Timber & Joinery Products (+1.4%) fell behind. Decorating (-2.7%) was the weakest category. With one less trading day this period, like-for-like **value** sales were +2.3% higher.

Latest 12 months v last year: August 2024 - July 2025 v August 2023 - July 2024

Total Builders Merchants **value** sales in the 12 months, August 2024 to July 2025, were flat (0.0%) compared to the same period a year earlier. **Volume** sales were +1.7% up but **prices** down -1.7%. By **value**, seven of the twelve categories sold more, led by Services (+3.7%), Tools (+3.3%) and Landscaping (+2.6%). Heavy Building Materials (0.0%) was on a par with Total Builders Merchants, while Timber & Joinery Products (-1.1%) fell behind. Renewables & Water Saving (-3.9%) was weakest. With one less trading day this year, like-for-like **value** sales were +0.4% higher.

Total Builders Merchants **value** sales in the 12 months, August 2024 to July 2025, were flat (0.0%) compared to the same period a year earlier. **Volume** sales were +1.7% up but **prices** down -1.7%.

Latest month v last year

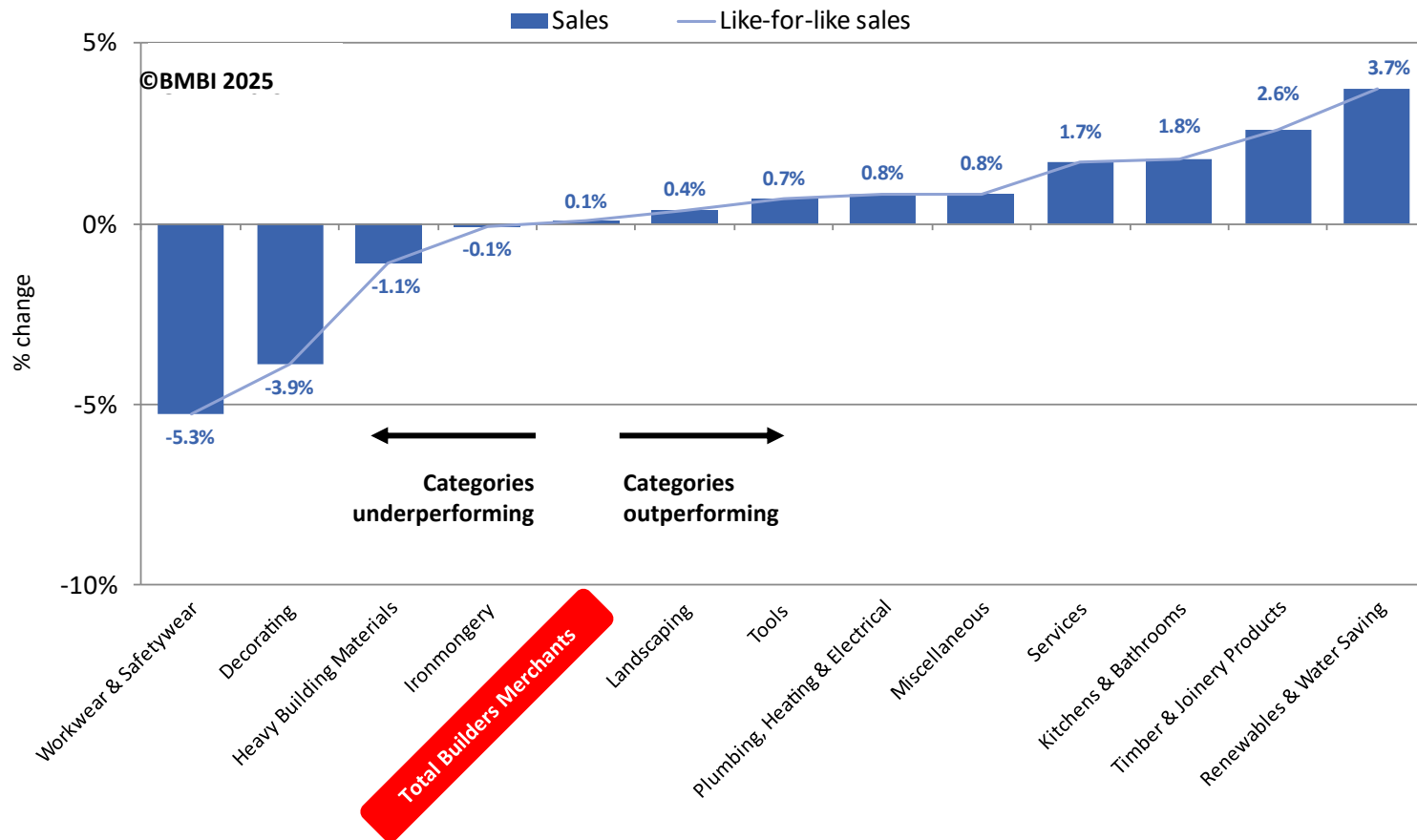
Value sales and like-for-like value sales % change

There was no difference in trading days (23).

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



July 2025 v July 2024



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

Total Builders Merchants value sales were up +0.1% in July 2025 compared with the same month last year. Volume sales were +0.6% up but prices down -0.6%.

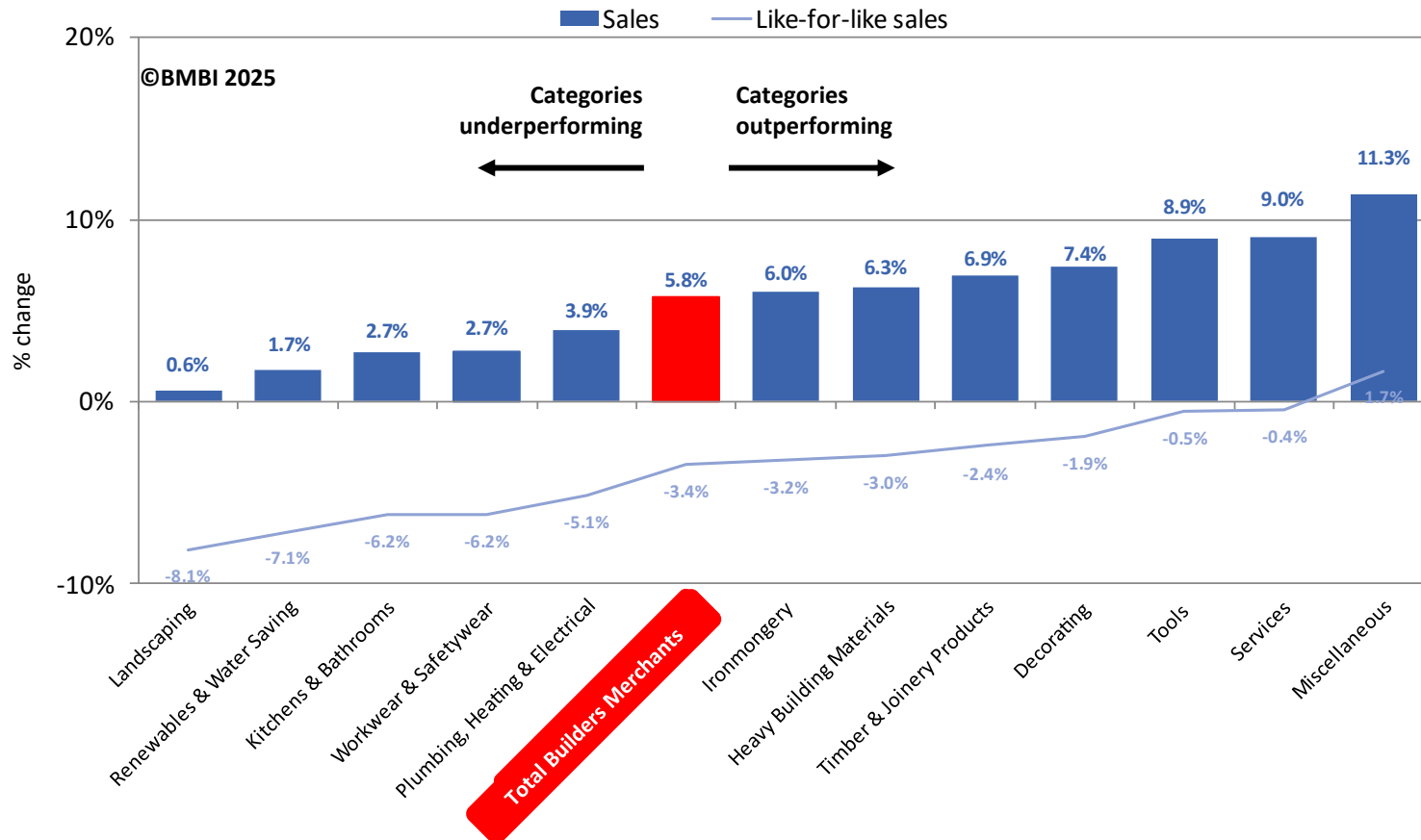
Latest month v previous month

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

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



July 2025 v June 2025



NIQ **GfK**

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

Total Builders Merchants **value** sales were +5.8% higher in July 2025 than in June 2025. **Volume** sales were up +5.4% and **prices** up +0.4%.

Latest 3 months v last year

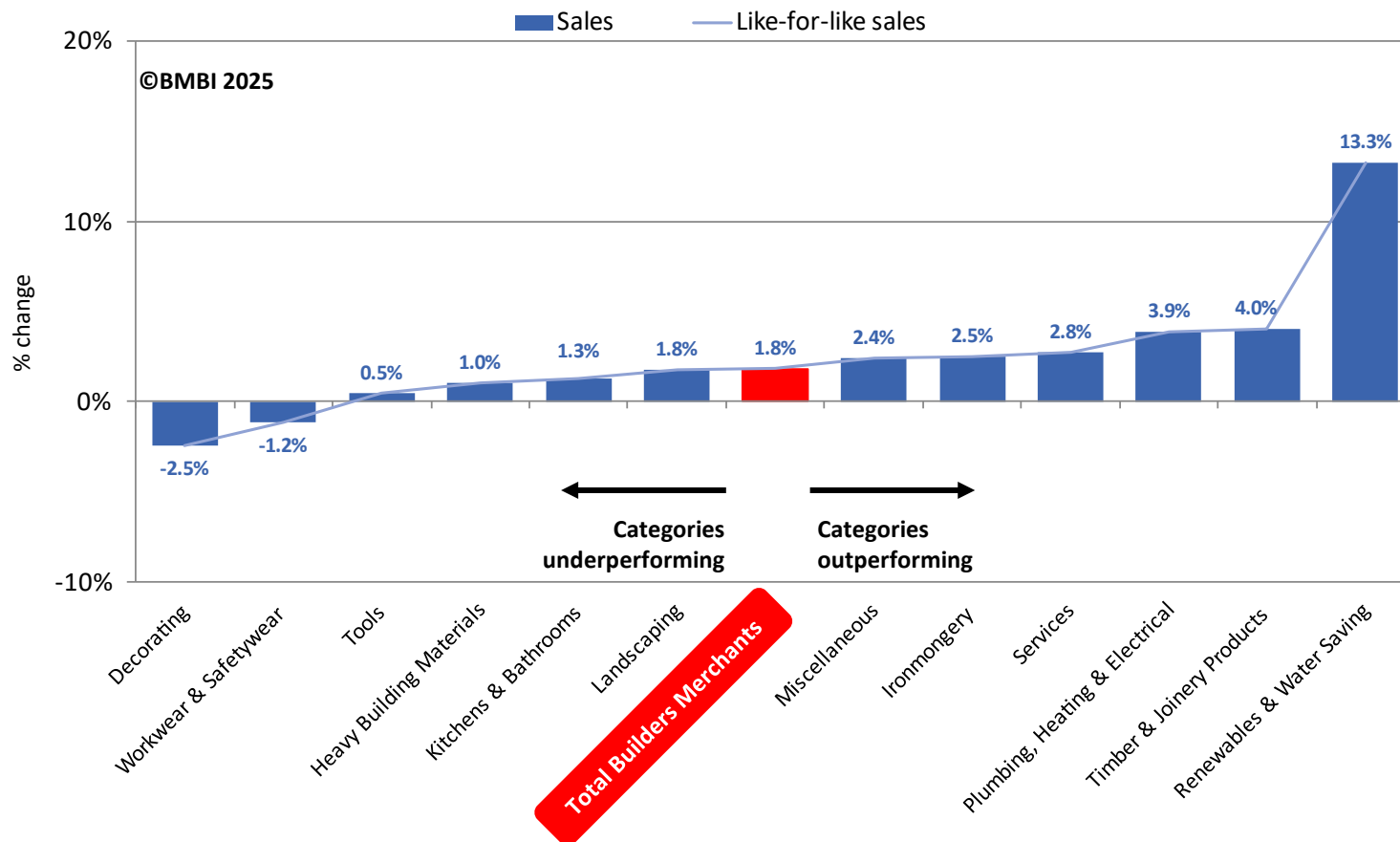
Value sales and like-for-like value sales % change

There was no difference in trading days (64).

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



3 months May 25 to Jul 25 v 3 months May 24 to Jul 24



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

Total Builders Merchants value sales in May to July 2025 were +1.8% higher than the same period last year. Volume sales were up +3.0% but prices were down -1.2%.

Latest 3 months v previous 3 months

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

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

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



3 months May 25 to Jul 25 v 3 months Feb 25 to Apr 25



NIQ GfK

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

Total Builders Merchants **value** sales in the three months May to July 2025 were +6.6% more than in February to April 2025. **Volume** sales were up +7.8% but **prices** down -1.1%.

Year-to-date v last year

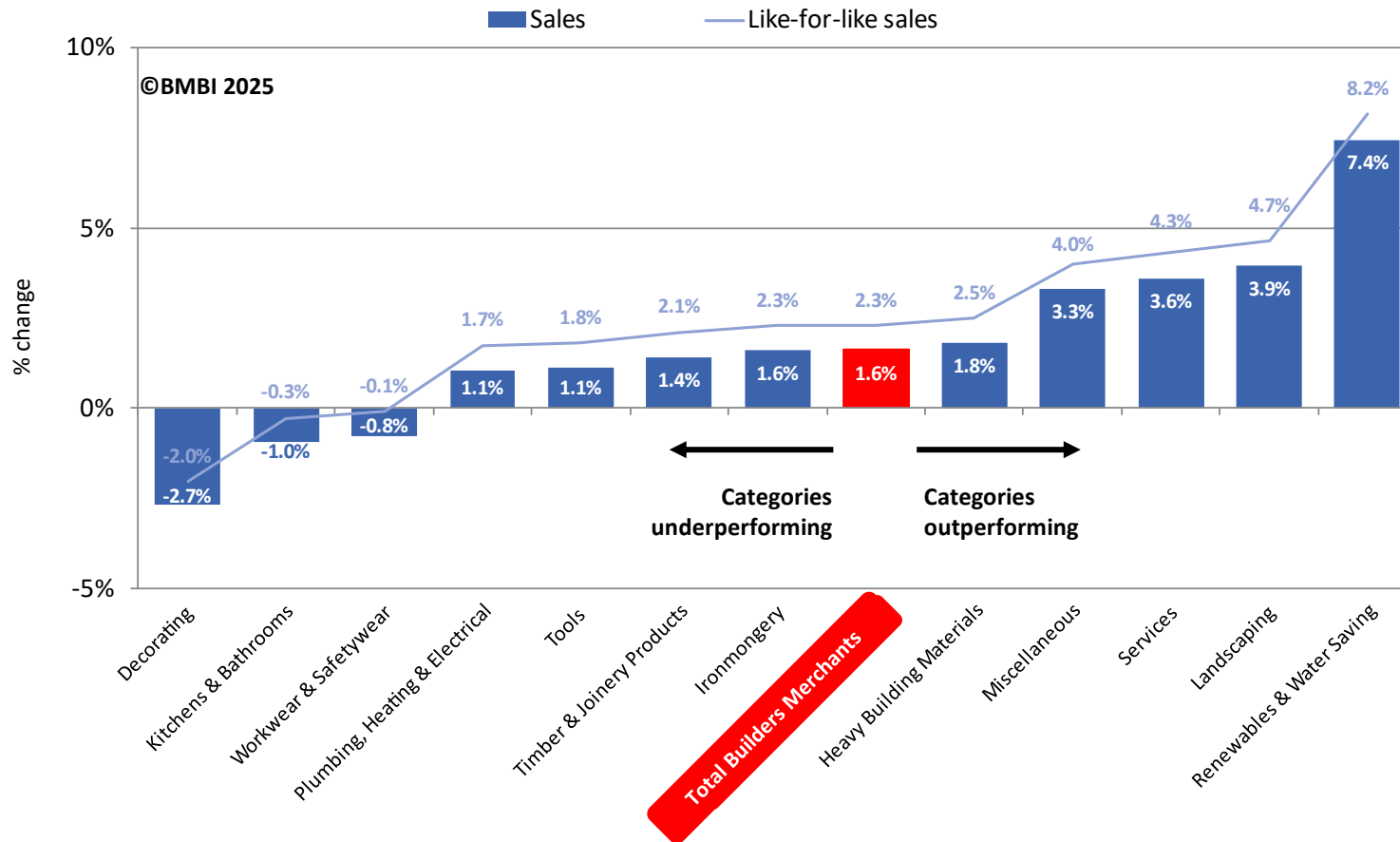
Value sales and like-for-like value sales % change

147 trading days this year v 148 trading days last year.

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



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



NIQ GfK

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

Total Builders Merchants **value** sales in the seven months January to July 2025 were +1.6% higher than in January to July 2024. **Volume** sales were +3.4% up but **prices** -1.8% down.

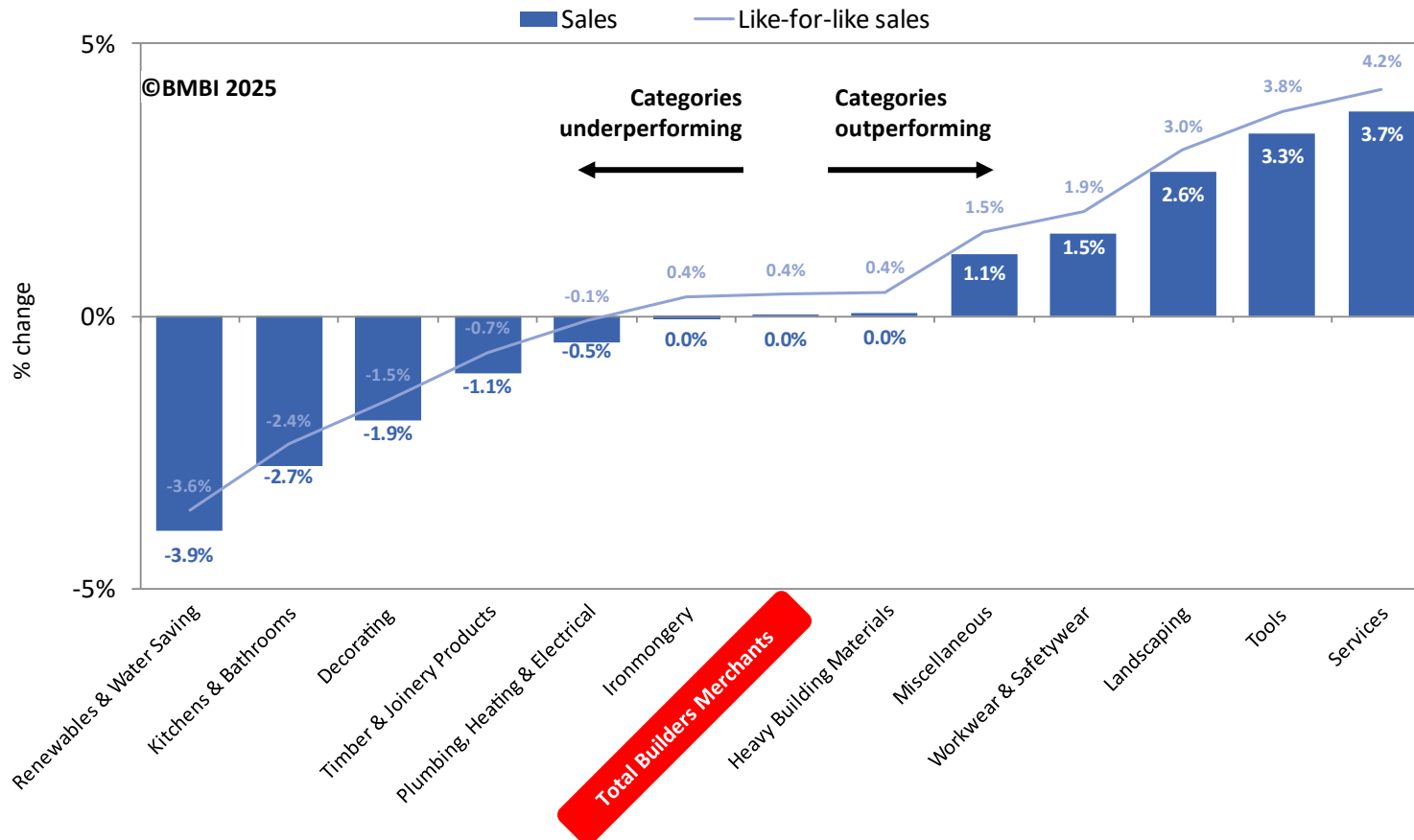
Latest 12 months v last year

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

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



12 months Aug 24 to Jul 25 v 12 months Aug 23 to Jul 24



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

Total Builders Merchants **value** sales in the 12 months, August 2024 to July 2025, were flat (0.0%) compared to the same period a year earlier. **Volume** sales were +1.7% up but **prices** down -1.7%.

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	21	23					

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	61			124		

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

TOTAL CATEGORY REPORT (TCR)



TRACKED PRODUCT GROUP REPORTING



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

Summer 2025 Edition



Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Summer 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 Andrei Imbru on 024 7685 4994 or email: Andrei.Imbru@bmf.org.uk



Contact us

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