

Excellence in building
materials supply

Builders Merchant Building Index



Executive Summary - October 2025

(Published 09 January 2026)

Highlights



BMBI Report October 2025 Highlights

(unadjusted for trading days)



Builders Merchant
Building Index

www.bmbi.co.uk

-0.1%

**Total Builders
Merchants value
sales were up
+0.2% in October
2025 compared
with the same
month last year.
Volume sales were
+0.8% up with
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 October [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 Q3 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: Q3 2025 Report](#)

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

[Read latest Comment: Q3 2025 Report](#)

Expert for Fasteners and Fixings:



Ian Doherty
Non-Executive Director
Hexstone and Owlett-Jaton

[Read latest Comment: Q3 2025 Report](#)

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q3 2025 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q3 2025 Report](#)

Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q3 2025 Report](#)



The Expert Panel

Speaking for their markets - 2



Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Heidelberg Materials

[Read latest Comment: Q3 2025 Report](#)

Expert for Paint:



Jamie Barber
UK&I Sales Director Trade
Dulux Trade

[Read latest Comment: Q3 2025 Report](#)

Expert for Website & Product Data Management Solutions:



Chris Fisher

Vice President of the EMEA lumber, building material and hardware (LBMH) division - ECI Software Solutions

[Read latest Comment: Q3 2025 Report](#)

Expert for Plumbing & Drainage:



Chris Dawson
Sales Director
Brett Martin

[Read latest Comment: Q3 2025 Report](#)

Expert for Plastic Plumbing for Hot and Cold Water Systems:



Matt Williams
Managing Director
Polypipe Building Products

[Read latest Comment: Q3 2025 Report](#)

Expert for Softwoods and Engineered Wood:



James Davenport
Managing Director
Metsä Wood UK

[Read latest Comment: Q3 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%.



Contents www.bmbi.co.uk info@bmbi.co.uk @theBMBI

Overview - 1

October 2025 value sales were up +0.2% compared with October last year

Total Builders Merchants **value** sales were up +0.2% in October 2025 compared with the same month last year. **Volume** sales were +0.8% up with **prices** down -0.6%. By **value**, five of the twelve categories sold more, led by Miscellaneous (+7.7%) and Landscaping (+6.7%). Heavy Building Materials, the largest category, fell -1.3%. Renewables & Water Saving (-7.6%) was the weakest category. There was no difference in trading days.

October 2025 v September 2025

With one more trading day in October 2025, **like-for-like value** sales (which take trading day differences into account) were -1.7% lower than September.

Total Builders Merchants **value** sales were +2.8% higher in October 2025 than in September. **Volume** sales were up +1.7% and **prices** up +1.0%. By **value**, ten of the twelve categories sold more, led by Workwear & Safetywear (+8.3%), Plumbing, Heating & Electrical (+8.2%), Miscellaneous (+7.9%) and Renewables & Water Saving (+7.0%). Heavy Building Materials (+3.3%) performed better than Total Builders Merchants, while Timber & Joinery Products (+2.5%) fell marginally behind.

October Index:

With two more trading days this October versus the Index base period, the **like-for-like value** sales Index was 111.0.

October's BMBI total **value** index was 123.5. All twelve categories exceeded 100, with Workwear & Safetywear (156.0) indexing the most. Ironmongery (115.6) indexed the least.

Latest three months v last year: August - October 2025 v August - October 2024

Total Builders Merchants **value** sales in the three months August to October 2025 were down -0.1% on the same period last year. **Volume** sales were +0.7% up but **prices** -0.8% down. By **value**, eight of the twelve categories sold more, led by Miscellaneous (+6.0%). Timber & Joinery Products (+1.8%) performed better than Total Builders Merchants, while Heavy Building Materials (-1.8%) fell behind. Decorating (-3.0%) was the weakest category. There was no difference in trading days.

Year-to-date

With one less trading day in the ten months January to October 2025, **like-for-like value** sales were +1.6% higher than in January to October 2024.

Overview continues on the next page...



Overview - 2

... continued from the previous page:

Latest three months v previous three months: August - October 2025 v May - July 2025

With one more trading day in the most recent period, August to October 2025, **like-for-like value** sales were -5.3% lower than the previous period, May to July 2025.

Total Builders Merchants **value** sales in the latest three months were -3.8% lower than in the previous three months.

Volume sales were -4.3% down but **prices** up +0.5%. By **value**, five of the twelve categories sold more, led by Workwear & Safetywear (+8.4%). Timber & Joinery Products (-1.9%) fell less than Total Builders Merchants, while Heavy Building Materials (-4.0%) fell a bit more. Seasonal category Landscaping (-17.9%) was the weakest category.

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

With one less trading day in the ten months January to October 2025, **like-for-like value** sales were +1.6% higher than in January to October 2024.

Total Builders Merchants **value** sales in the ten months were +1.1% higher than the same period last year. **Volume** sales were +2.6% up but **prices** -1.5% down. By **value**, ten of the twelve categories sold more, led by Renewables & Water Saving (+5.6%). Timber & Joinery Products (+1.5%) performed better than Total Builders Merchants, but Heavy Building Materials (+0.7%) fell behind. Workwear & Safetywear (-1.1%) and Decorating (-2.8%) were the weakest categories.

Latest 12 months v last year: November 2024 - October 2025 v November 2023 - October 2024

With one less trading day in the latest 12 months, November 2024 to October 2025, **like-for-like value** sales were +1.1% higher compared to the same period a year earlier, November 2023 to October 2024.

Total Builders Merchants **value** sales in the latest 12 months were up +0.7% versus the same period a year earlier. **Volume** sales were +2.5% up but **prices** down -1.8%. By **value**, nine of the twelve categories sold more, led by Landscaping (+3.8%), Services (+3.0%) and Miscellaneous (+3.0%). Decorating (-3.1%) was weakest.

In the 12 months November 2024 to October 2025, **like-for-like value** sales were +1.1% higher compared to the same period a year earlier, November 2023 to October 2024.

Total value sales were up +0.7%, with **volume** sales +2.5% up but **prices** down -1.8%.



Latest month v last year

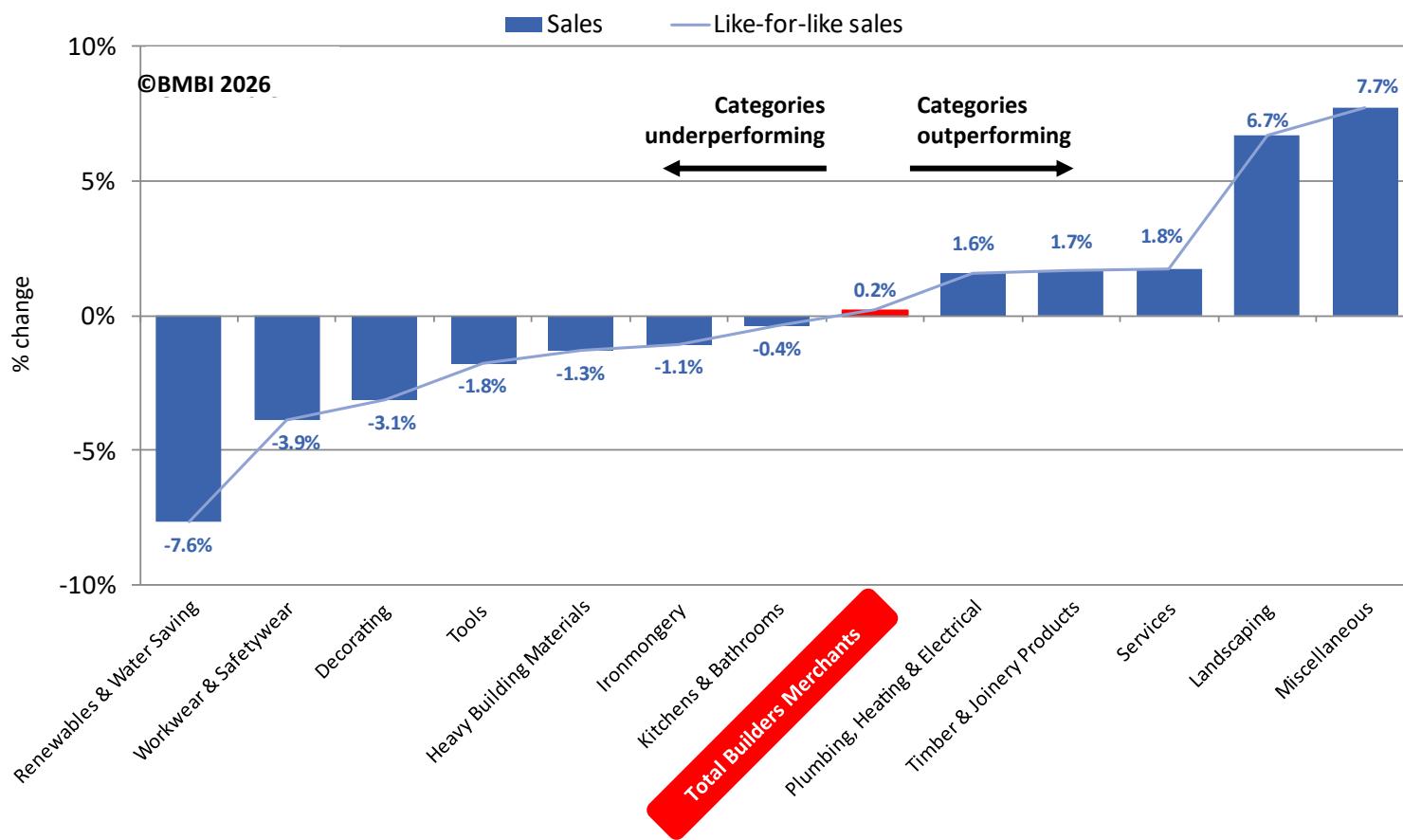
Value sales and like-for-like value sales % change

There was no difference in trading days (23).

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



October 2025 v October 2024



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

Total Builders Merchants **value** sales were up +0.2% in October 2025 compared with the same month last year.

Volume sales were +0.8% up with **prices** down -0.6%.



Latest month v previous month

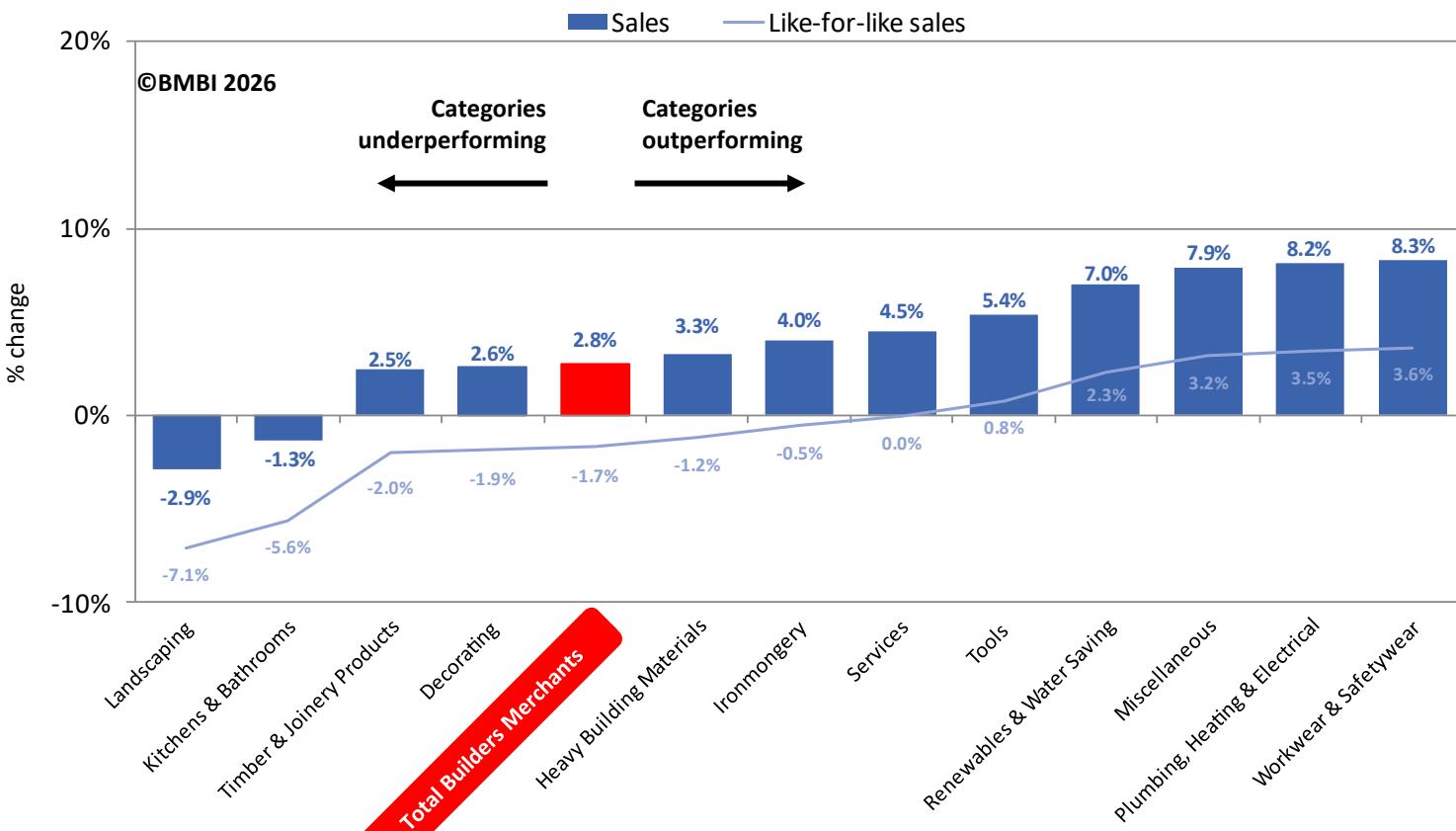
Value sales and like-for-like value sales % change

23 trading days this month v 22 trading days last month.

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



October 2025 v September 2025



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

Like-for-like value sales in October 2025, were -1.7% lower than September.

Total value sales were up +2.8%, with volume sales up +1.7% and prices up +1.0%.



Latest 3 months v last year

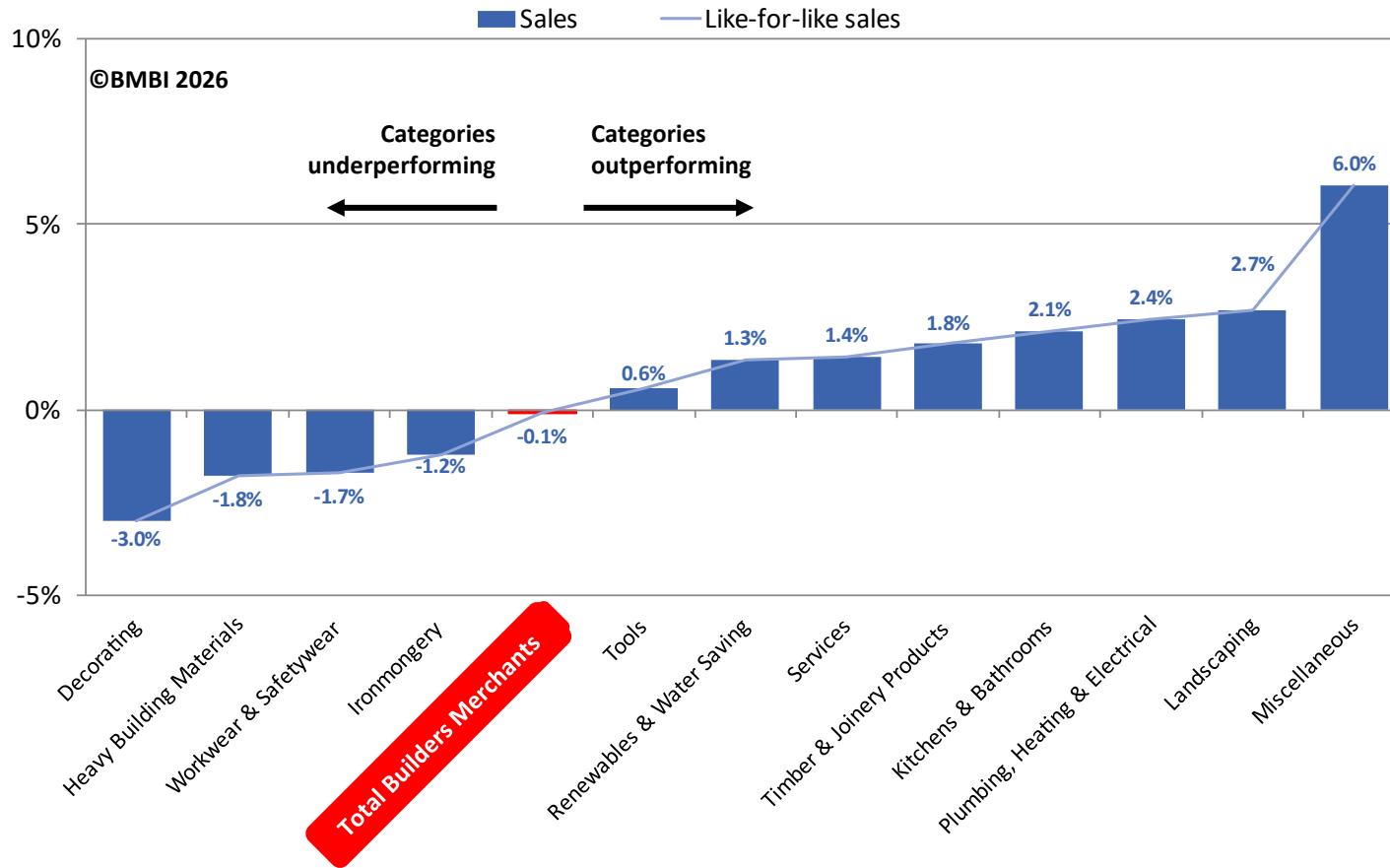
Value sales and like-for-like value sales % change

There was no difference in trading days (65).

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



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



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

Total Builders Merchants **value** sales in the three months August to October 2025 were down -0.1% on the same period last year.

Volume sales were +0.7% up but **prices** -0.8% down.



Latest 3 months v previous 3 months

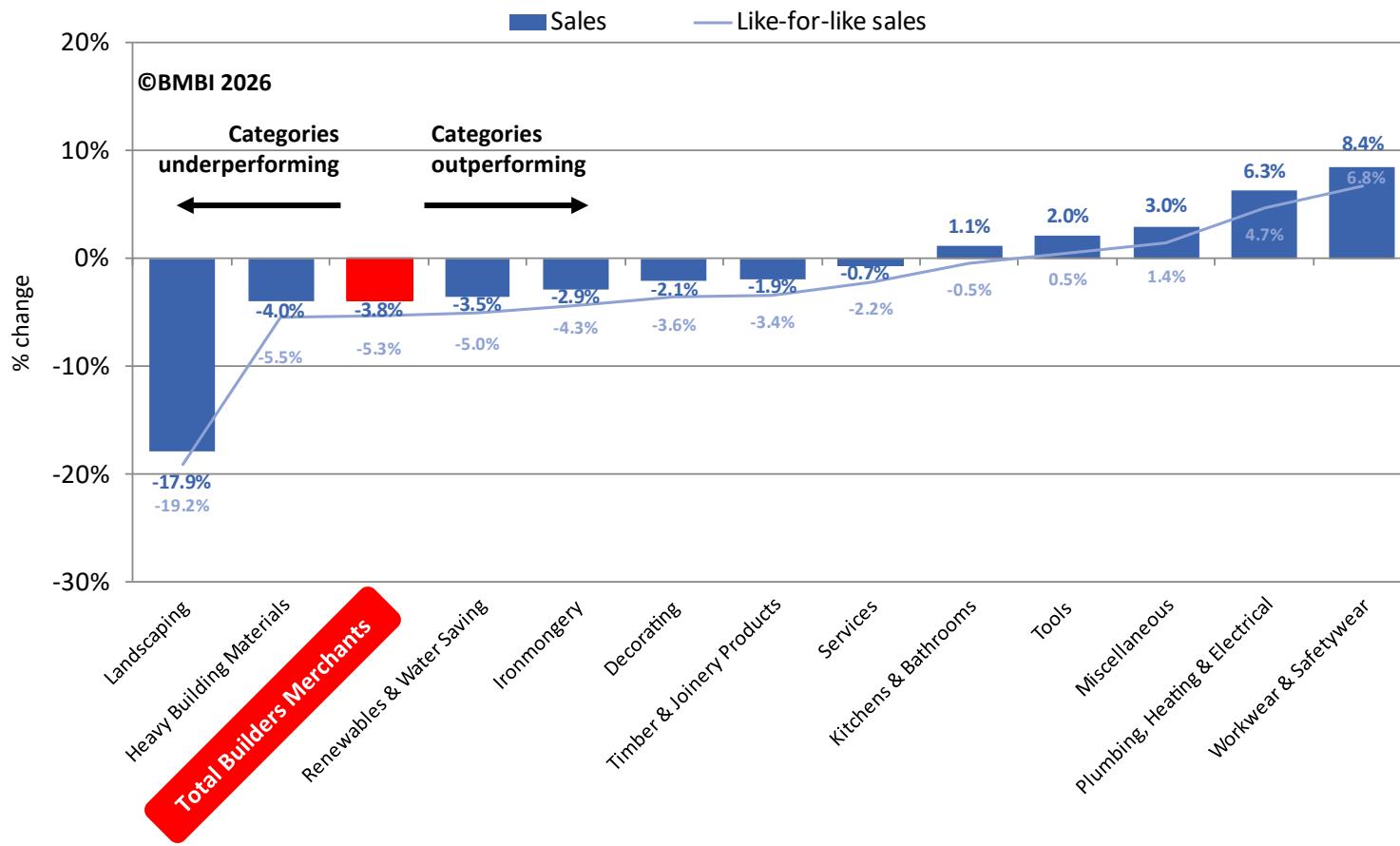
Value sales and like-for-like value sales % change

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

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



3 months Aug 25 to Oct 25 v 3 months May 25 to Jul 25



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

August to October 2025 like-for-like value sales were -5.3% lower than the previous period, May to July 2025.

Total value sales were down -3.8%, with **volume** sales -4.3% down but **prices** up +0.5%.



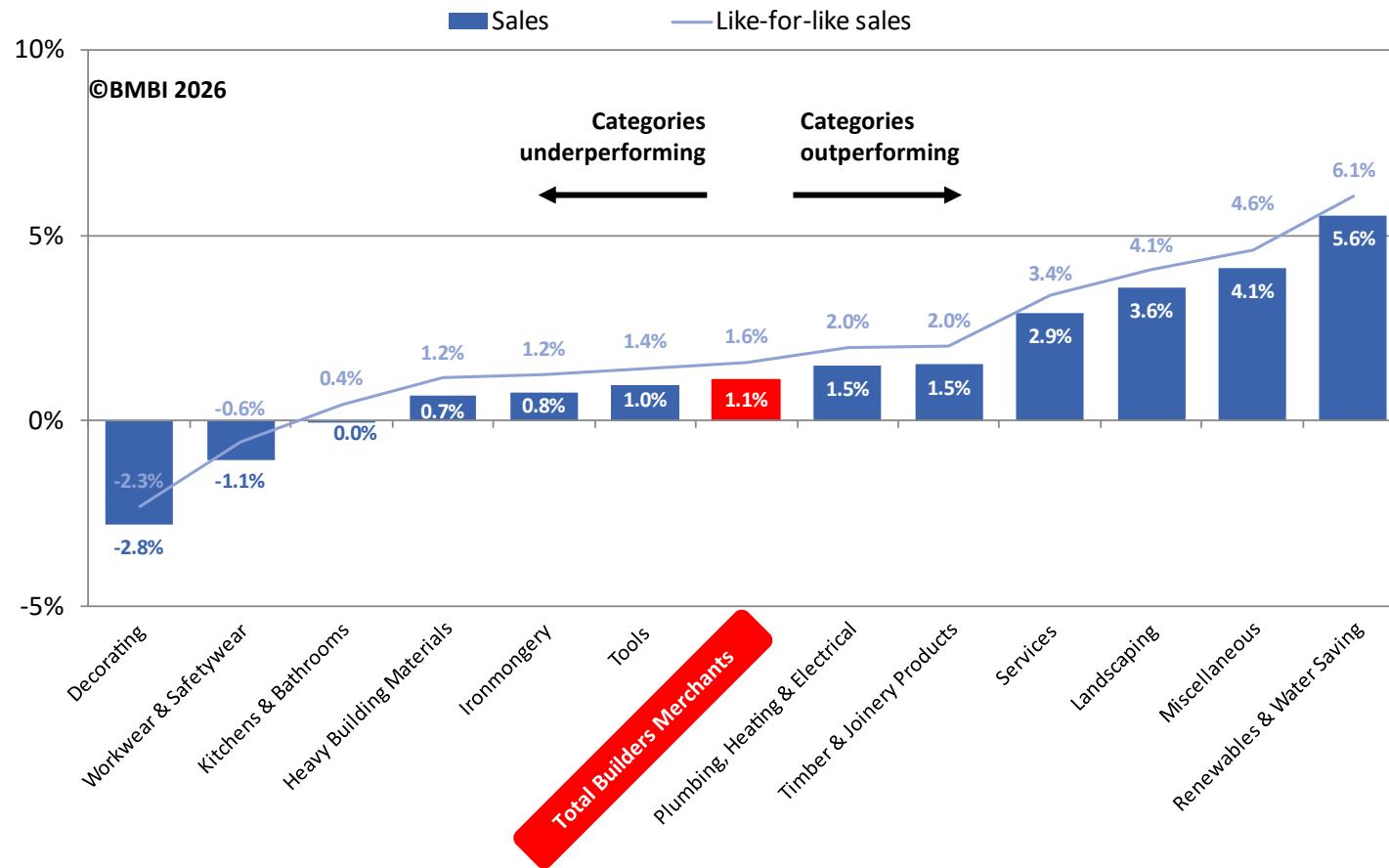
Year-to-date v last year

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

212 trading days this year v 213 trading days last year.
Like-for-like sales take trading day differences into account.



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



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

In the ten months January to October 2025, **like-for-like value sales** were +1.6% higher than in January to October 2024.

Total value sales were up +1.1%, with **volume** sales up +2.6% but **prices** -1.5% down.

Latest 12 months v last year

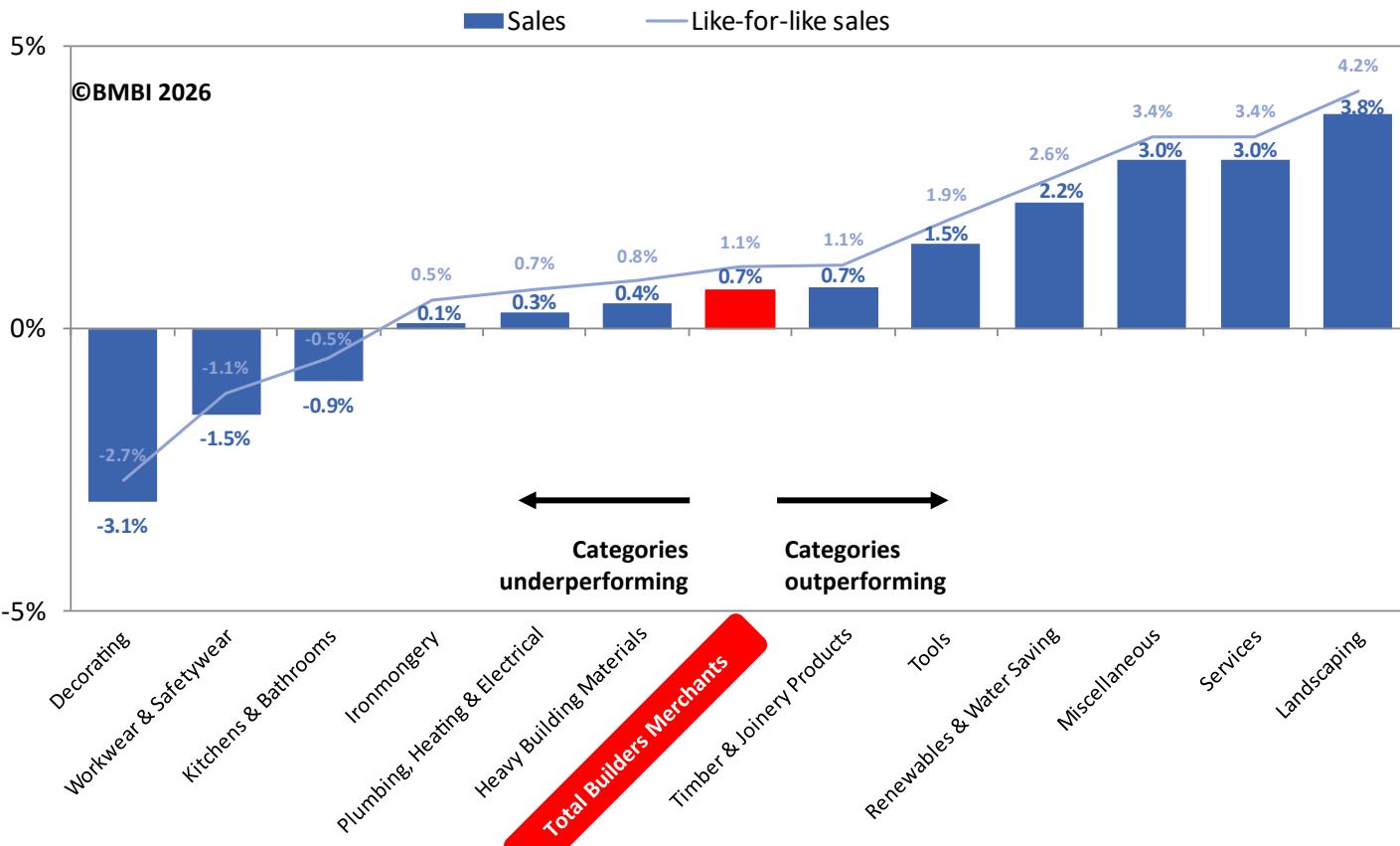
Value sales and like-for-like value sales % change

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 Nov 24 to Oct 25 v 12 months Nov 23 to Oct 24



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

November 2024 to October 2025, like-for-like value sales were up +1.1% compared to November 2023 to October 2024.

Total value sales were up +0.7%, with **volume** sales up +2.5% but **prices** down -1.8%.



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	20	21	23	20	22	23	23	16

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	61	65	61

Half Year

2023

H1	H2
124	124

2024

H1	H2
125	126

2025

H1	H2
124	124

Full Year

2023

248
2024

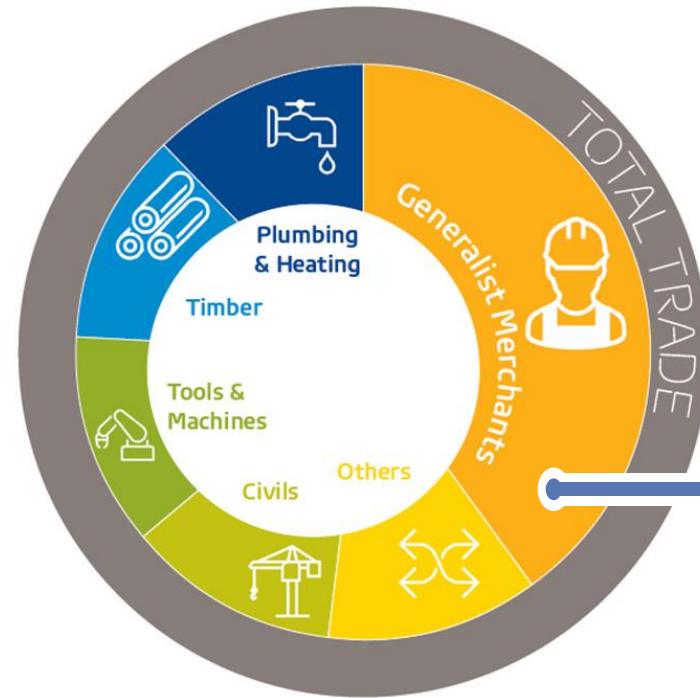
2024

251
2025



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

NiQ 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



NiQ GfK's Product Categories

Reports cover category headline values & in-depth, brand-level insights



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 NiQ 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)



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Building the Industry & Building Brands from Knowledge



Excellence in building
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BMF (Builders Merchant Federation) Forecast Report

BMF Forecast Report

Winter 2025 Edition



Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Winter 2025 onwards, is available.

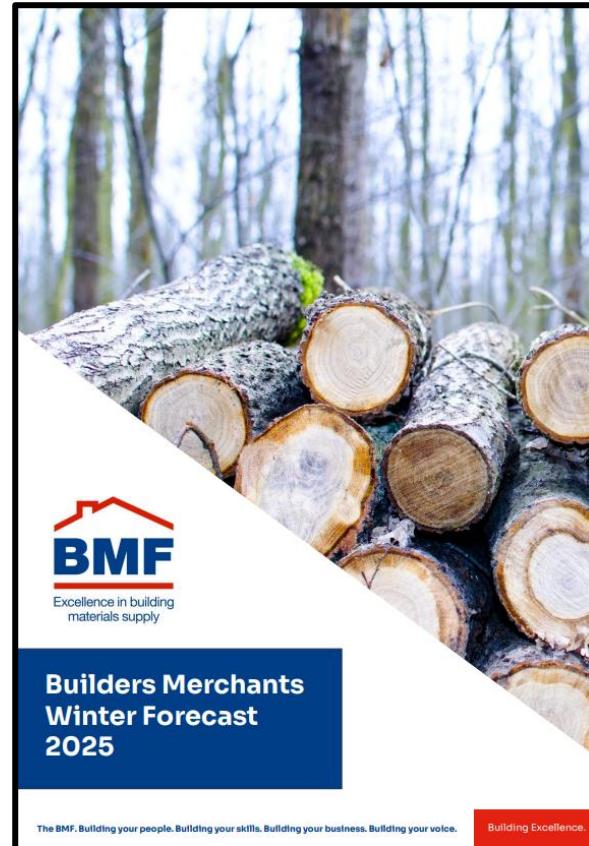
While Builders Merchants Building Index (BMBI) data, which is provided by GfK and is based on actual sales category performance, has enabled users to see which products and regions are currently growing, the forecast report takes this one stage further to meet the industry's need for accurate forecasting.

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

For further information



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