

Excellence in building
materials supply

Builders Merchant Building Index



Monthly report for 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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Contents

Click links below to visit pages



The 'Contents' link in the footer brings you back to this page.

Click links to visit pages:	Page
Highlights	2
Contents	3
Introduction	4
BMBI Expert Panel	5-6
88% coverage Statement	7
Overview	8 - 9
Monthly data:	
Latest month v last year sales chart, by category	10
Latest month v previous month sales chart, by category	11
Other periods:	
Latest 3 months v last year sales chart, by category	12
Latest 3 months v previous 3 months sales chart, by category	13
Year to date v last year sales chart, by category	14
Latest 12 months v last year sales chart, by category	15
Monthly Category Charts:	
Timber & Joinery Products	16
Heavy Building Materials	16
Decorating	17
Tools	17

Click links to visit pages:	Page
Workwear & Safetywear	18
Ironmongery	18
Landscaping	19
Plumbing Heating & Electrical	19
Renewables & Water Saving	20
Kitchens & Bathrooms	20
Miscellaneous	21
Services	21
Monthly indices:	
Monthly BMBI Index table, by category	22
Monthly BMBI Index chart, trends	23
Latest month BMBI Index chart, by category	24
Additional content:	
Trading days	25
Methodology	26 – 28
BMB Forecast Report	29 – 30
Brands behind BMBI	31
Contacts	32



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%.

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

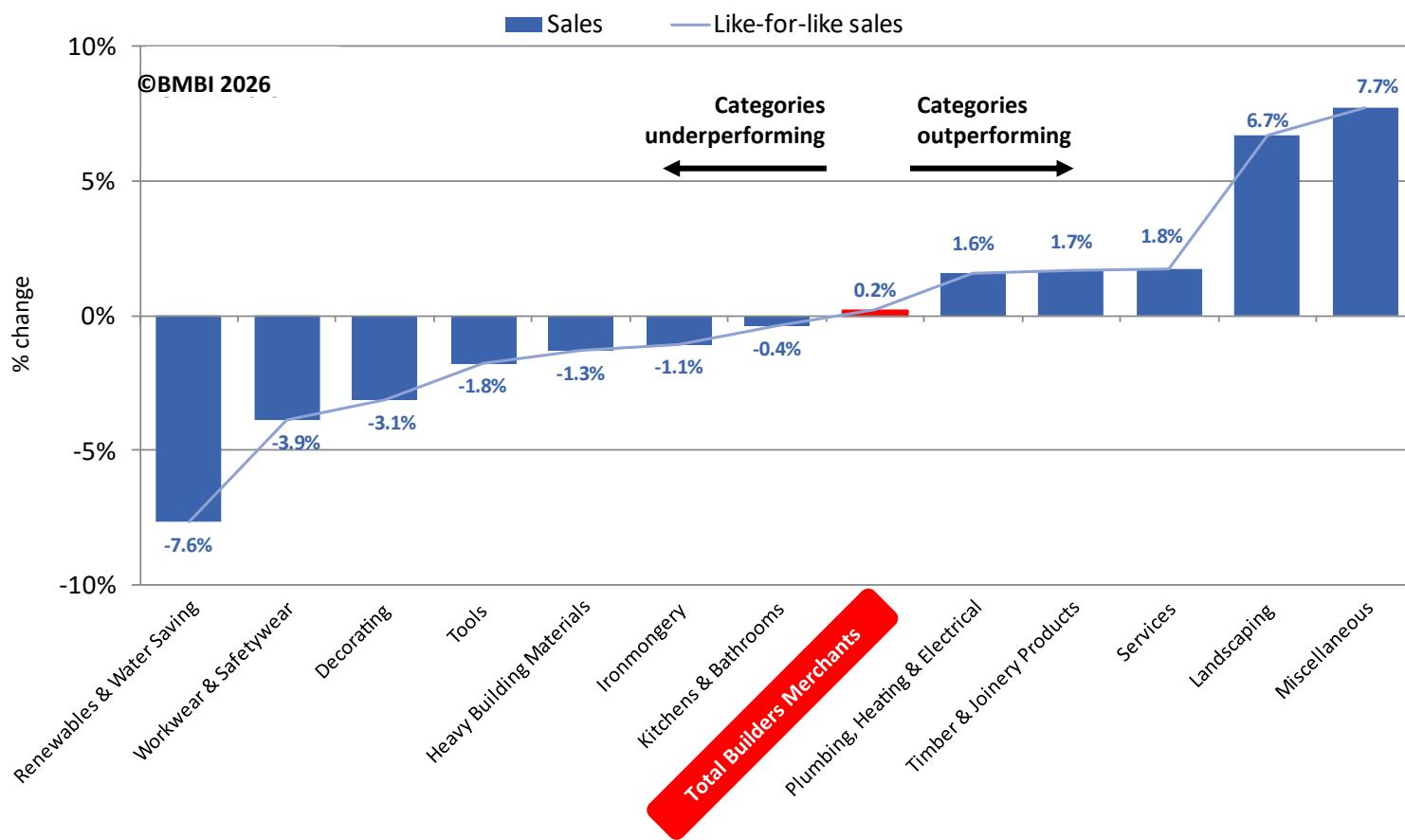
Value sales and like-for-like value sales % change

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

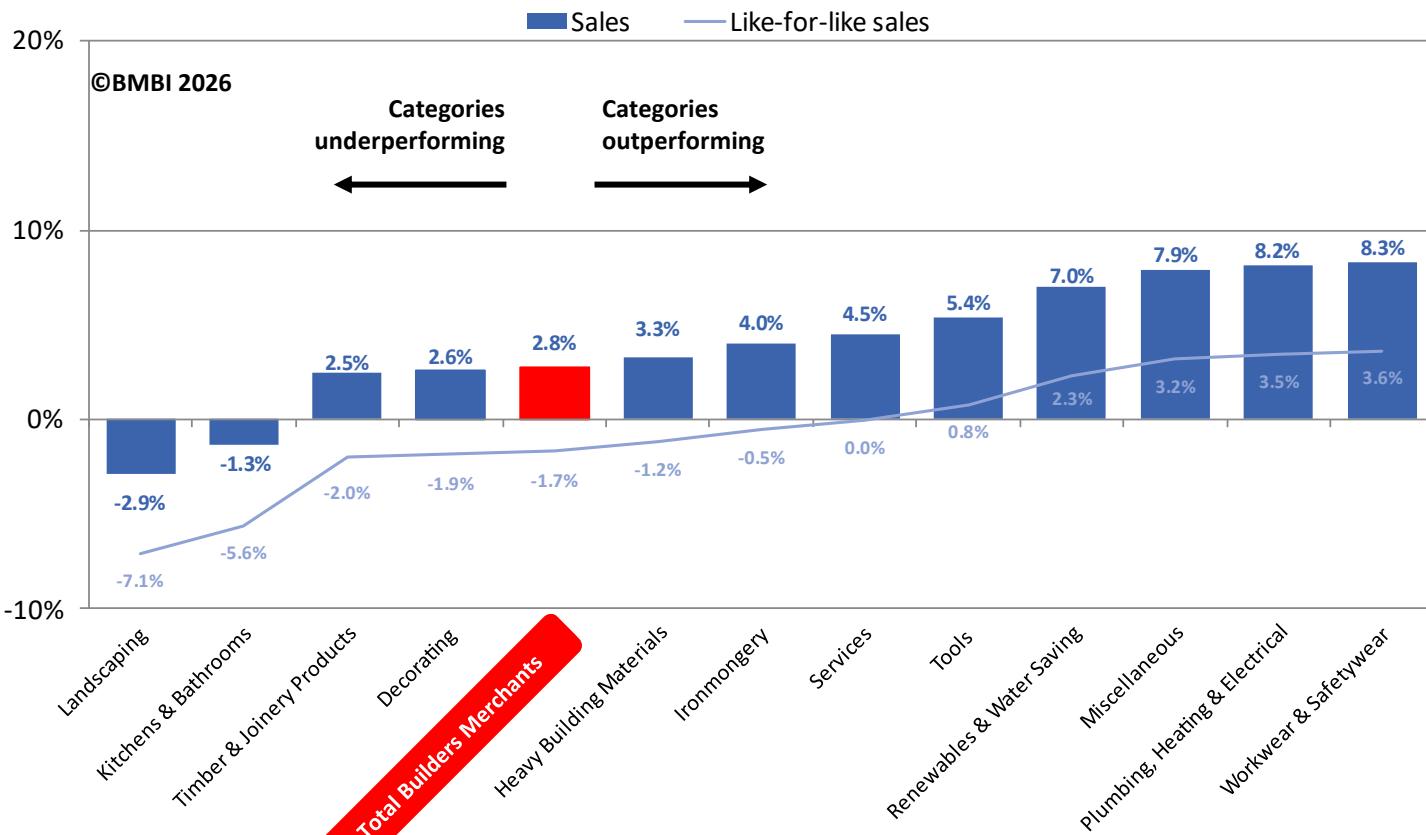
Value sales and like-for-like value sales % change

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

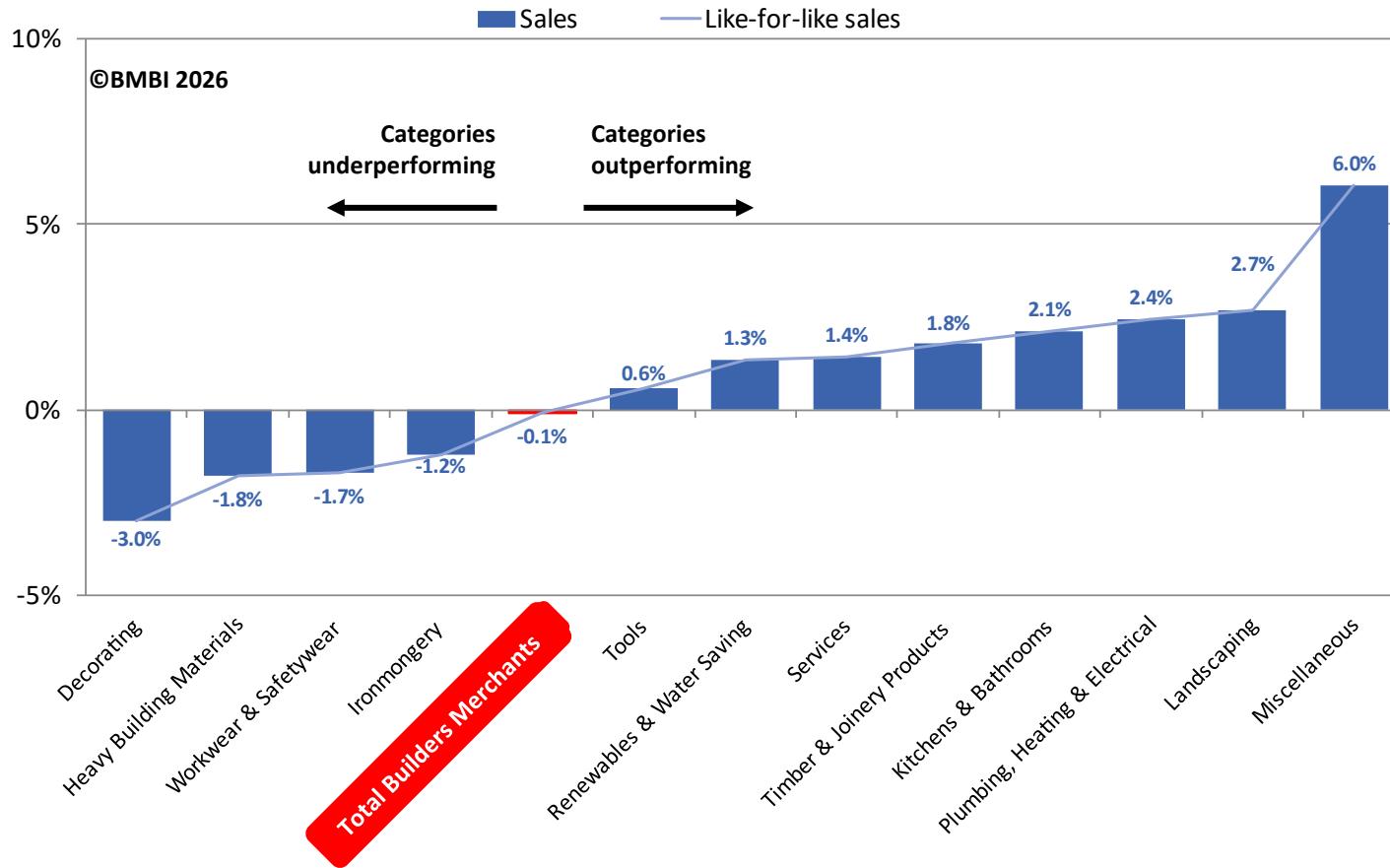
Value sales and like-for-like value sales % change

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

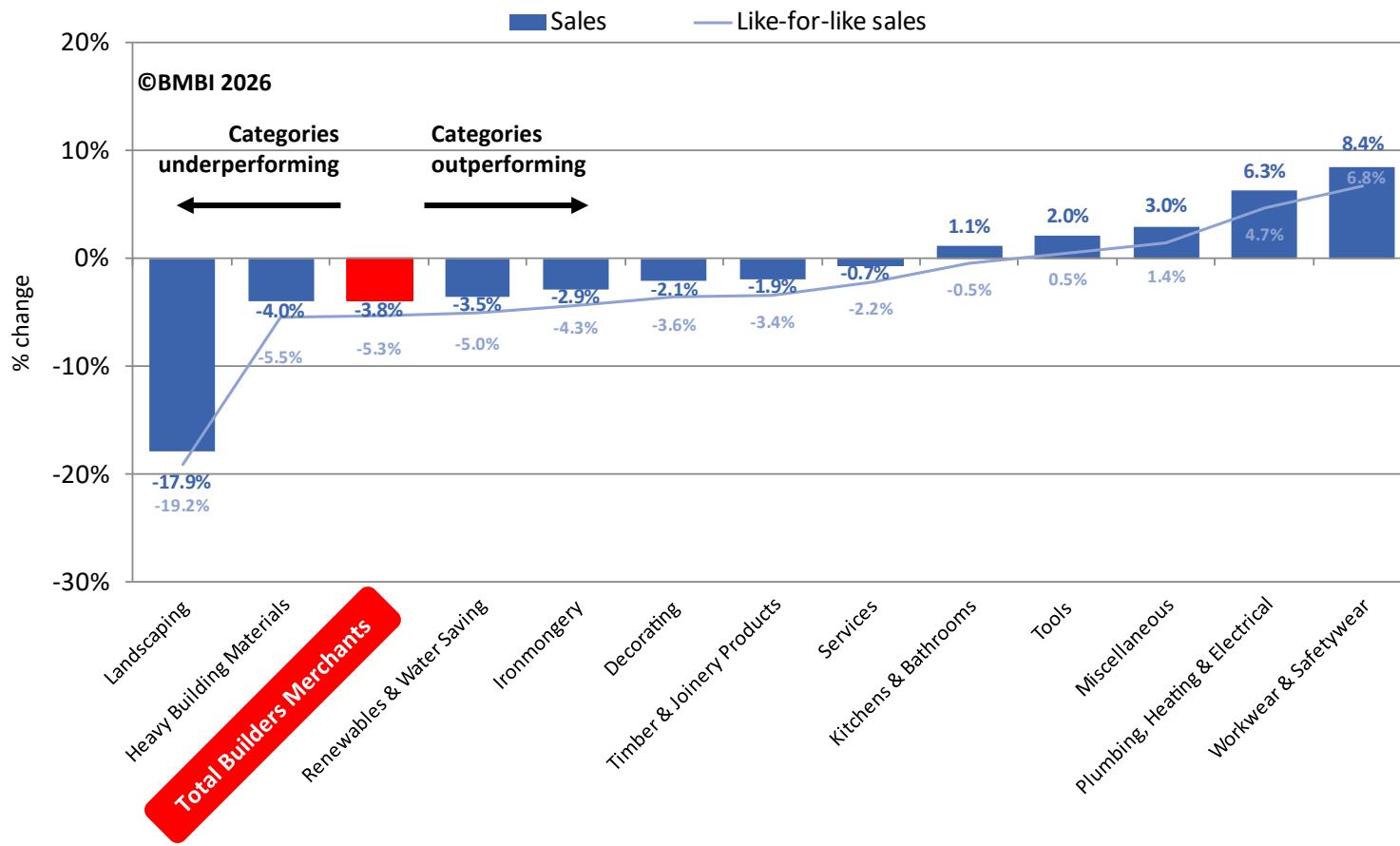
Value sales and like-for-like value sales % change

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%.



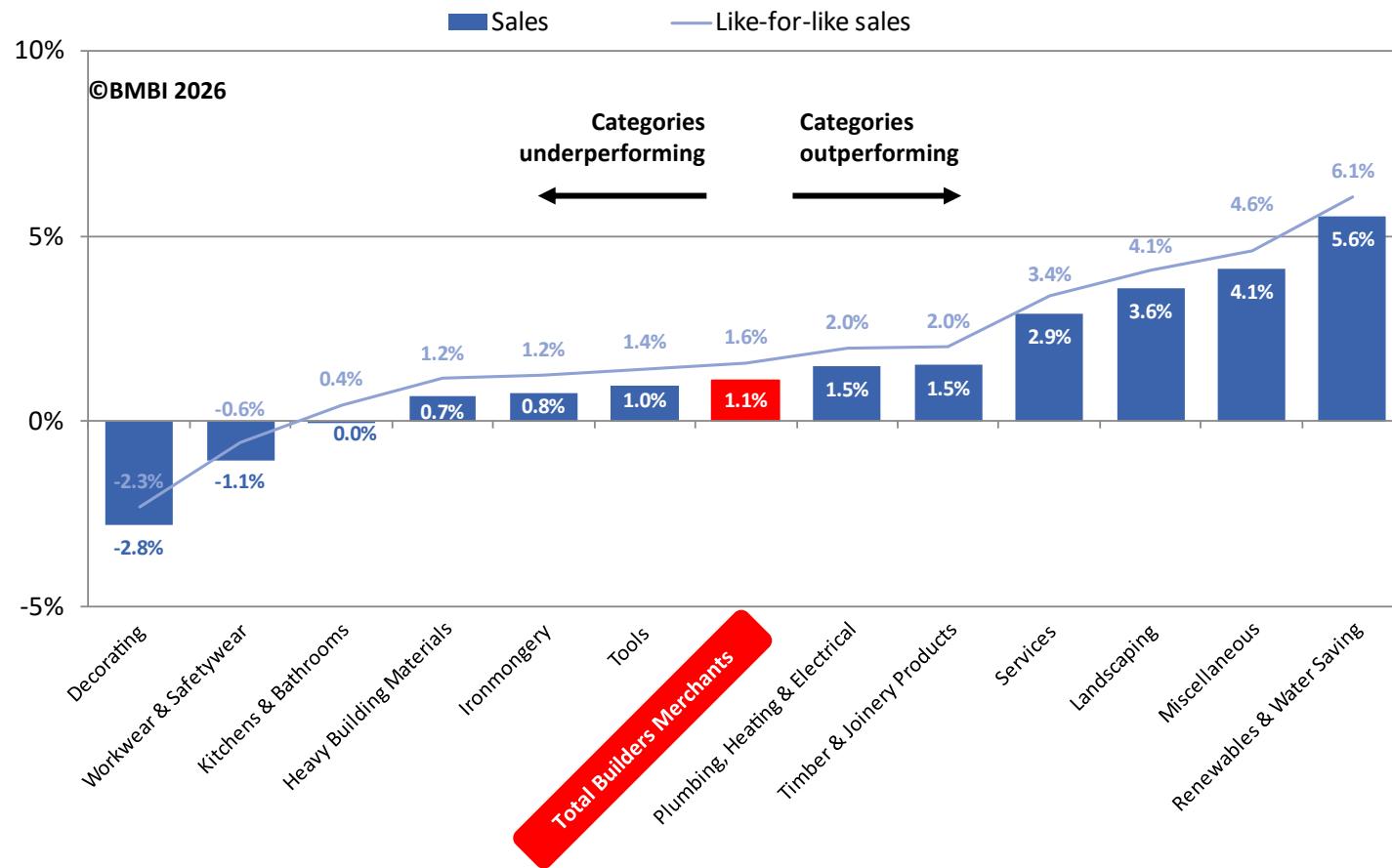
Year-to-date v last year

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

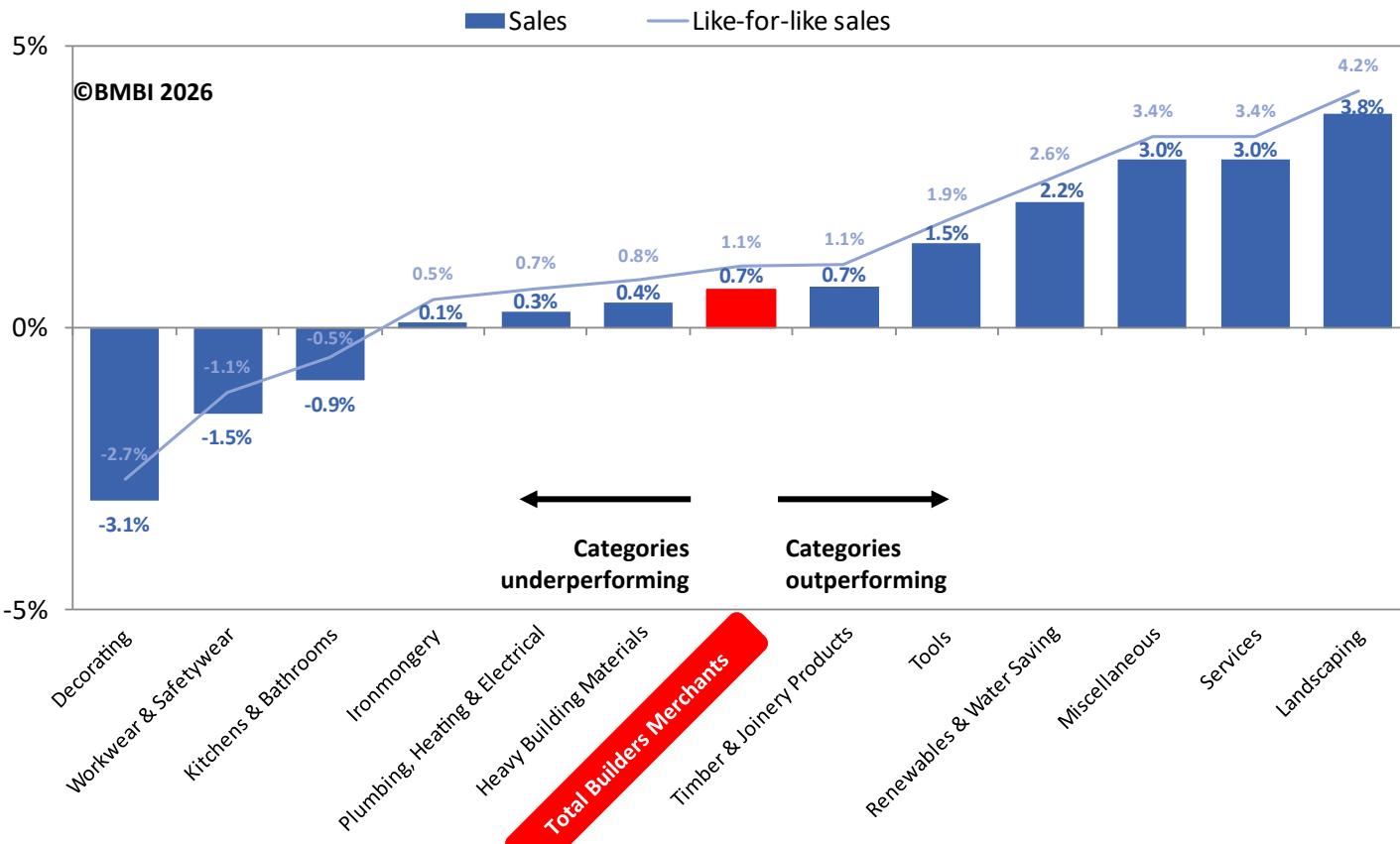
Value sales and like-for-like value sales % change

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%.



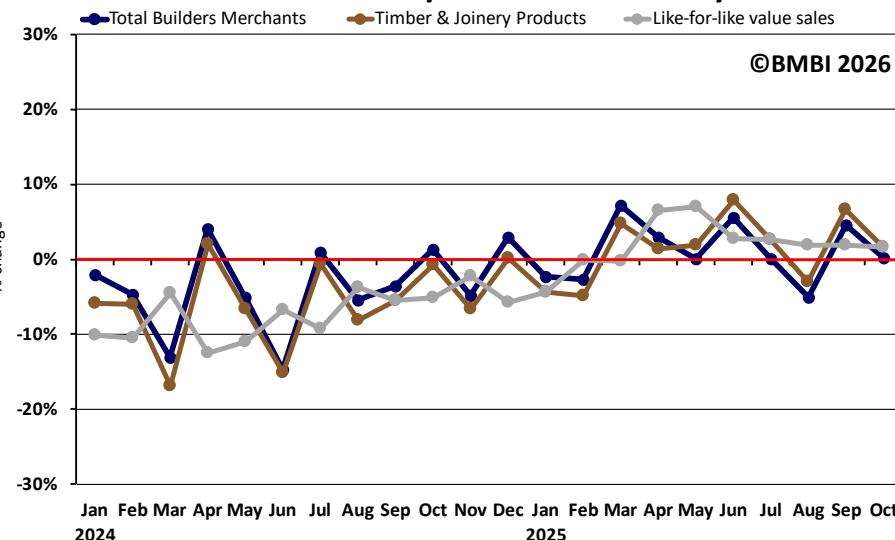
Monthly Year-on-year

Value sales % change

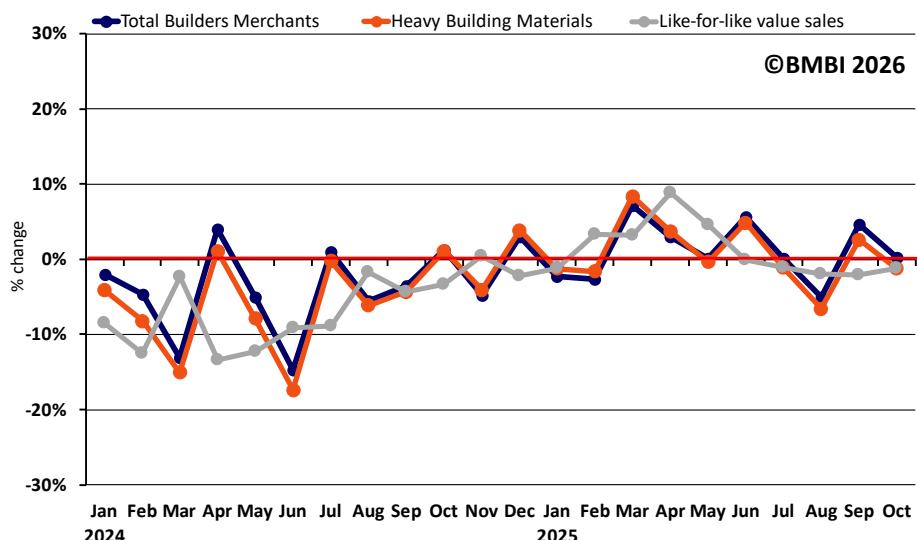
October 2025



Timber & Joinery Products - Monthly



Heavy Building Materials - Monthly



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

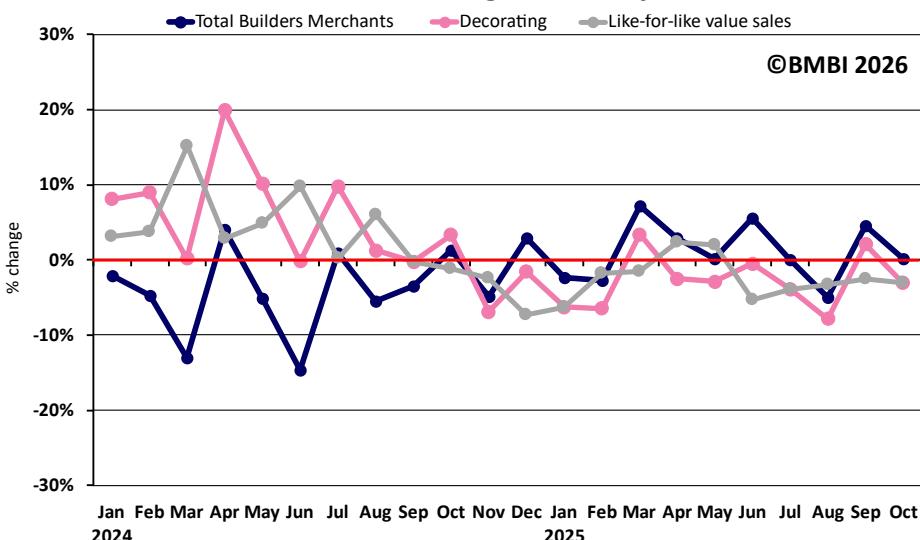
Monthly Year-on-year

Value sales % change

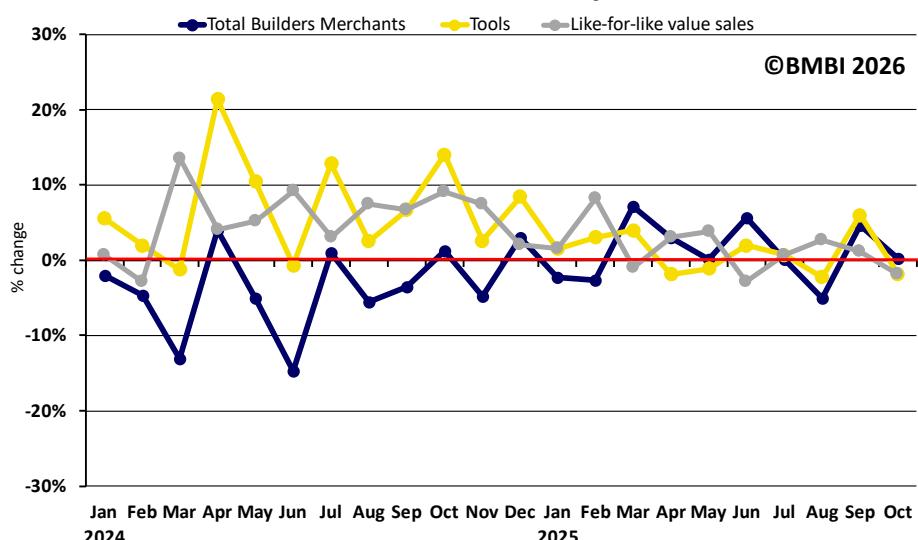
October 2025



Decorating - Monthly



Tools - Monthly



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

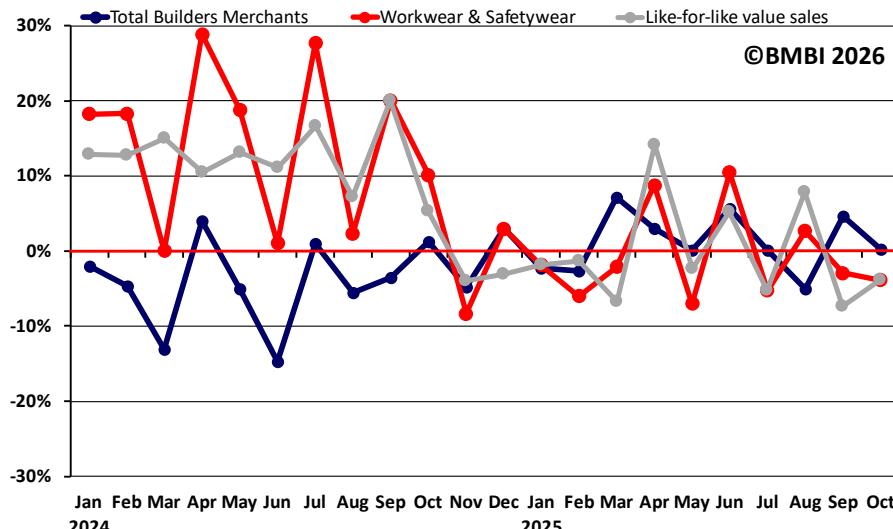
Monthly Year-on-year

Value sales % change

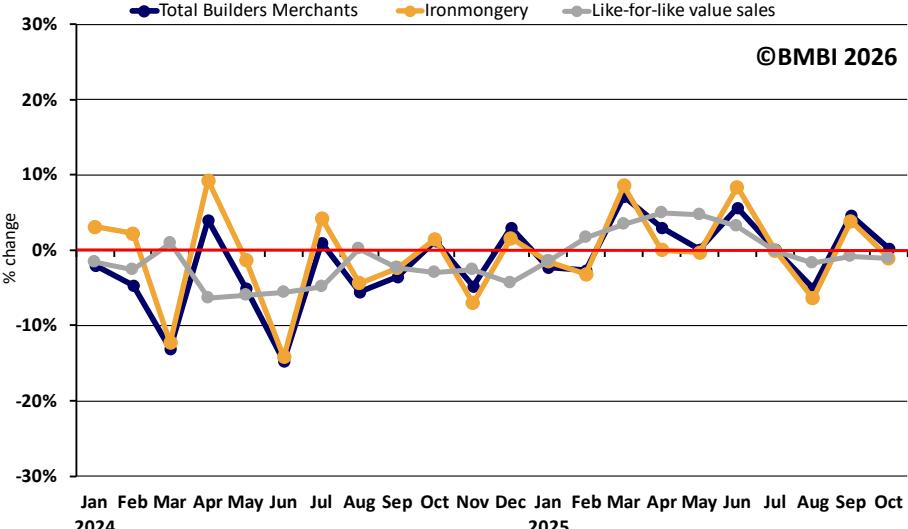
October 2025



Workwear & Safetywear - Monthly



Ironmongery - Monthly



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

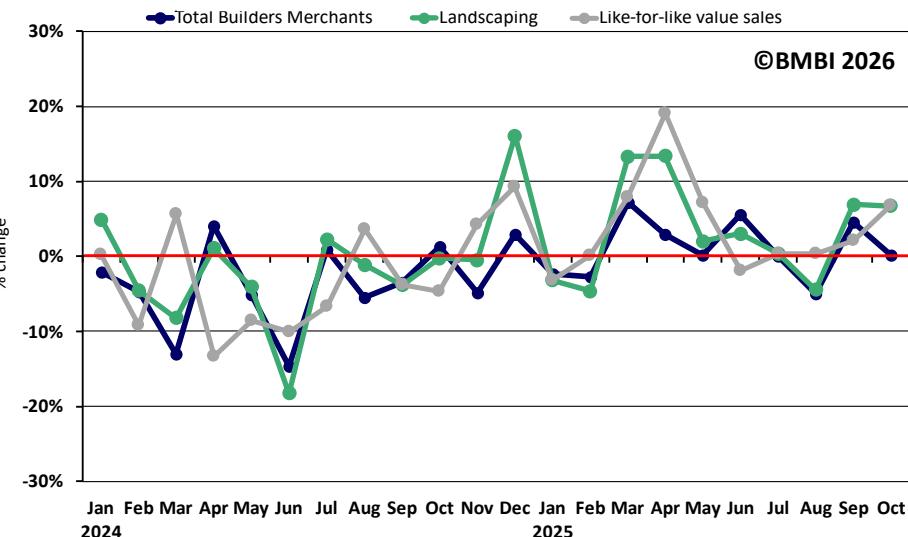
Monthly Year-on-year

Value sales % change

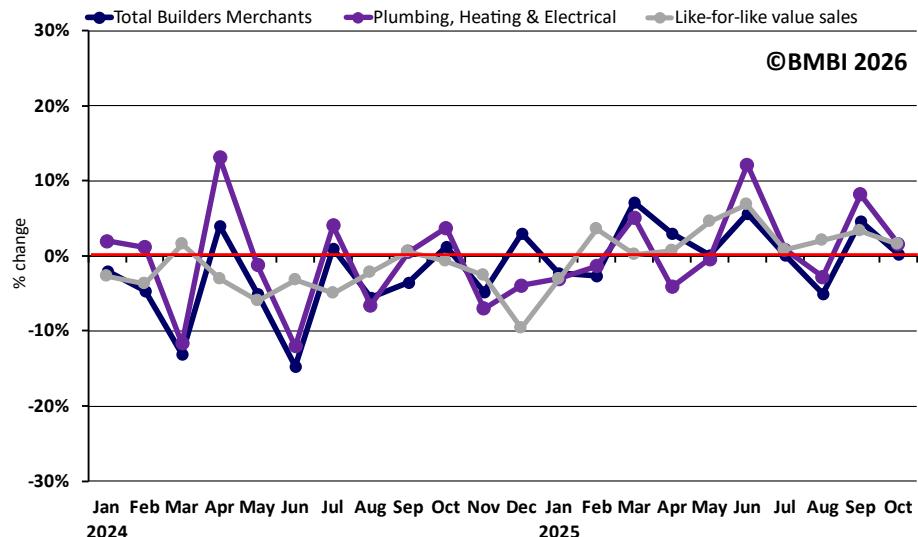
October 2025



Landscaping - Monthly



Plumbing, Heating & Electrical - Monthly



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

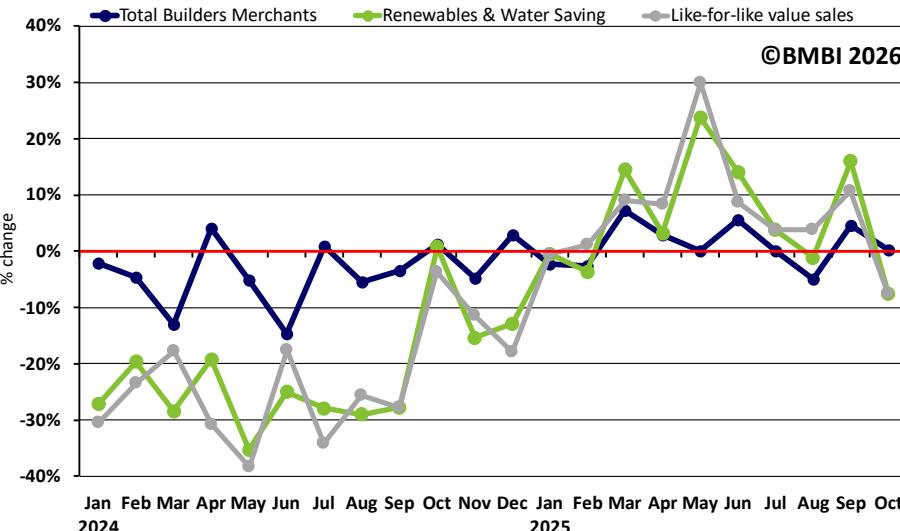
Monthly Year-on-year

Value sales % change

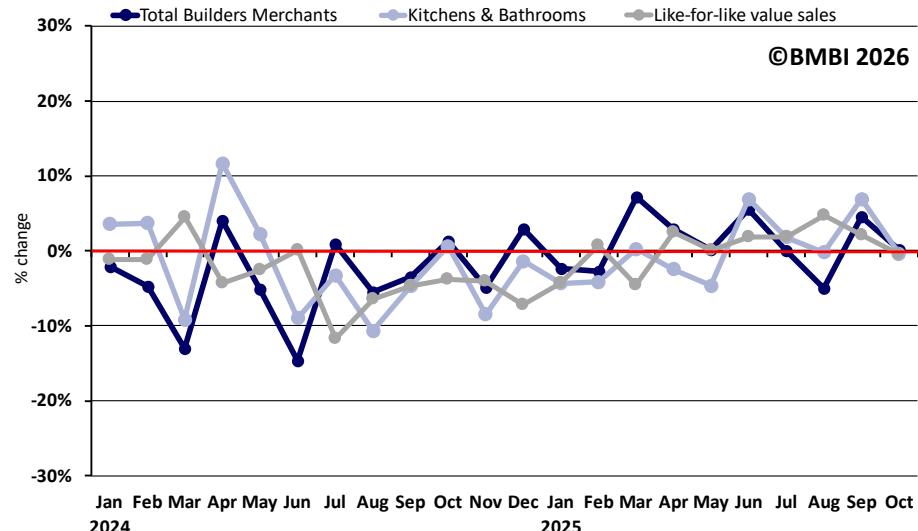
October 2025



Renewables & Water Saving - Monthly



Kitchens & Bathrooms - Monthly



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

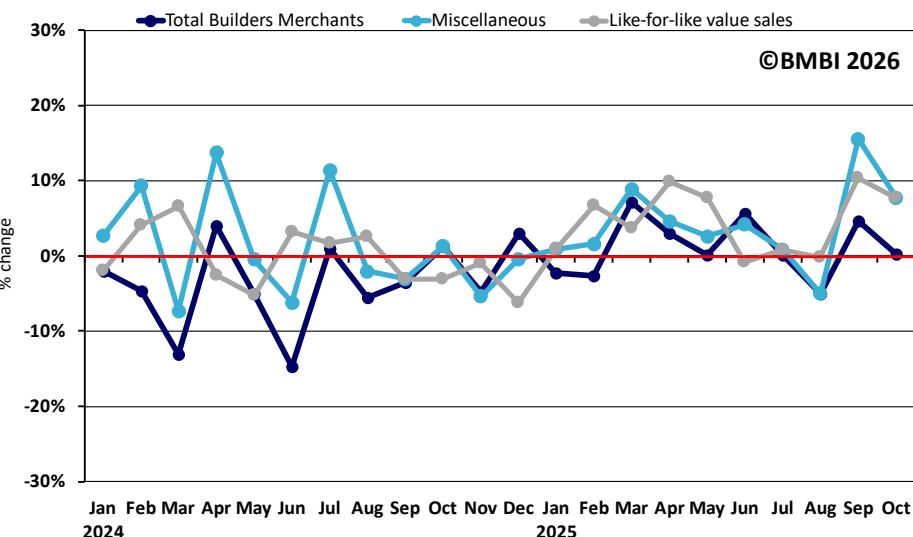
Monthly Year-on-year

Value sales % change

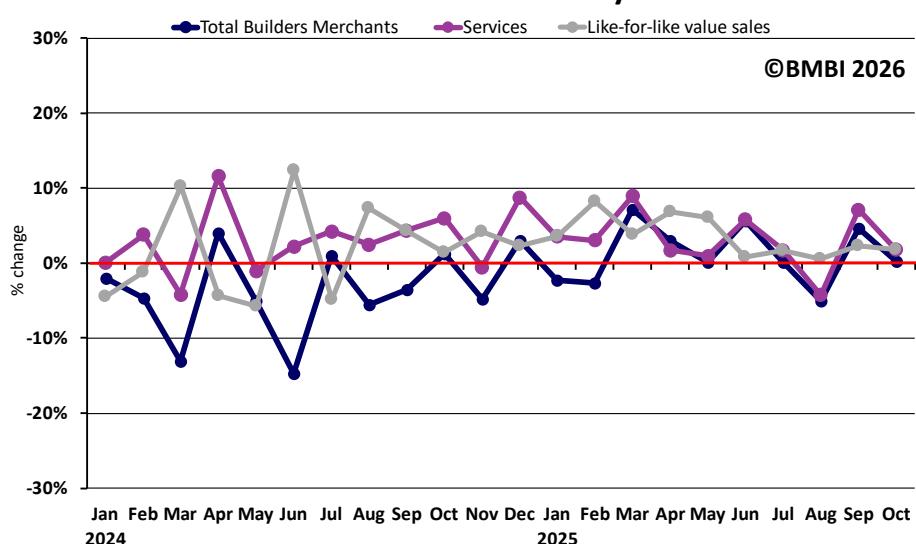
October 2025



Miscellaneous - Monthly



Services - Monthly



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

Monthly: Index by Categories

October 2024* - October 2025

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



MONTHLY SALES VALUE INDEX	Index	2024			2025									
		Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Total Builders Merchants	100	123.2	110.9	74.8	100.2	104.6	120.2	121.2	121.3	120.3	127.2	111.0	120.1	123.5
Timber & Joinery Products	100	116.9	105.4	69.9	96.2	97.8	110.6	111.3	113.4	113.3	121.1	106.2	116.0	118.9
Heavy Building Materials	100	125.9	112.8	74.2	100.4	105.9	121.8	122.0	121.6	120.8	128.4	111.4	120.3	124.3
Decorating	100	136.3	121.9	84.3	109.4	112.2	128.3	126.0	128.1	125.5	134.8	119.5	128.7	132.1
Tools	100	130.7	117.7	81.3	107.6	110.9	121.0	117.5	116.1	113.1	123.2	109.4	121.8	128.4
Workwear & Safetywear	100	162.2	149.7	105.2	145.4	133.3	135.2	143.3	126.0	130.8	134.4	124.2	144.0	156.0
Ironmongery	100	116.8	105.1	75.4	104.5	101.6	112.6	109.1	108.7	110.7	117.4	100.4	111.1	115.6
Landscaping	100	111.3	95.5	64.2	82.0	94.1	134.5	154.9	156.7	144.3	145.2	125.3	122.3	118.8
Plumbing, Heating & Electrical	100	129.8	120.9	87.9	118.7	118.2	121.3	109.0	106.7	110.8	115.1	99.8	121.9	131.9
Renewables & Water Saving	100	152.4	125.8	88.1	120.3	124.8	141.9	137.3	135.8	132.5	134.8	116.5	131.6	140.8
Kitchens & Bathrooms	100	124.7	121.7	81.3	108.9	113.1	116.6	116.4	113.3	120.2	123.5	110.8	125.9	124.2
Miscellaneous	100	110.4	102.1	75.1	105.1	104.7	108.5	104.9	103.5	99.6	110.9	94.2	110.2	118.9
Services	100	125.4	112.6	90.0	102.1	108.3	122.4	121.6	120.0	119.1	129.8	116.8	122.1	127.6

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



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

Monthly: Index

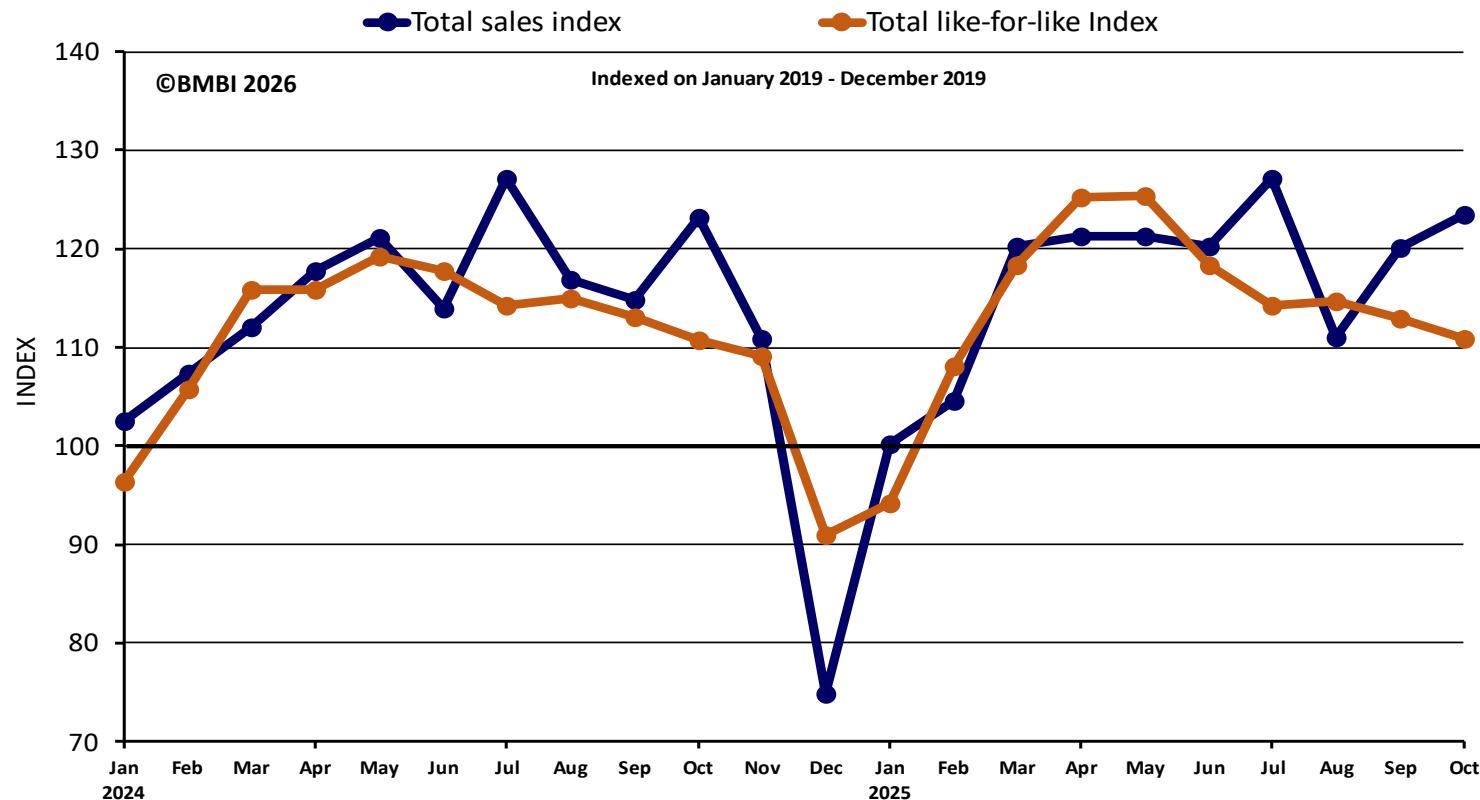
Value sales and like-for-like value sales index

23 trading days this month v 21 trading days in the Index base period.

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



Total Builders Merchants sales v like -for-like sales index



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

With two more trading days this October 2025 versus the Index base period, the like-for-like **value** sales Index was 111.0.

October's 2025 BMBI **total value** index was 123.5.

Latest month: Index by Categories

Value sales and like-for-like value sales index

23 trading days this month v 21 trading days in the Index base period.

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



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	17

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

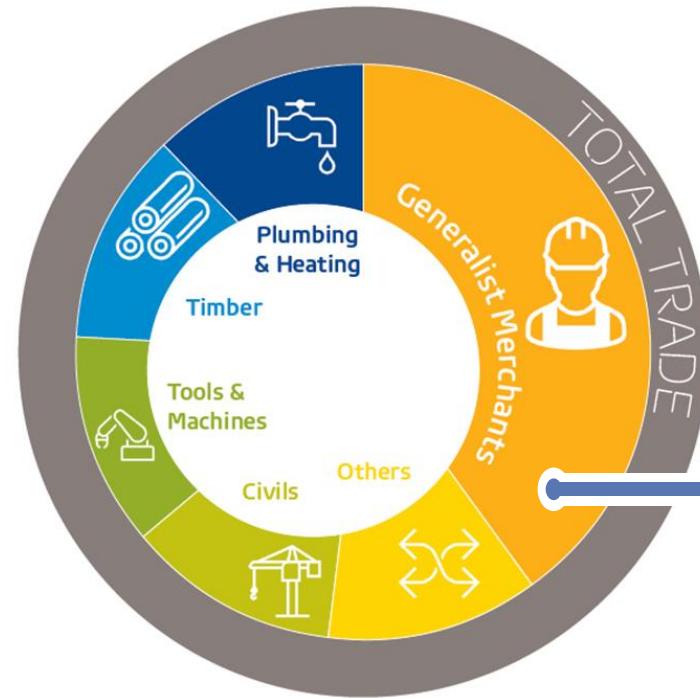
2024

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:

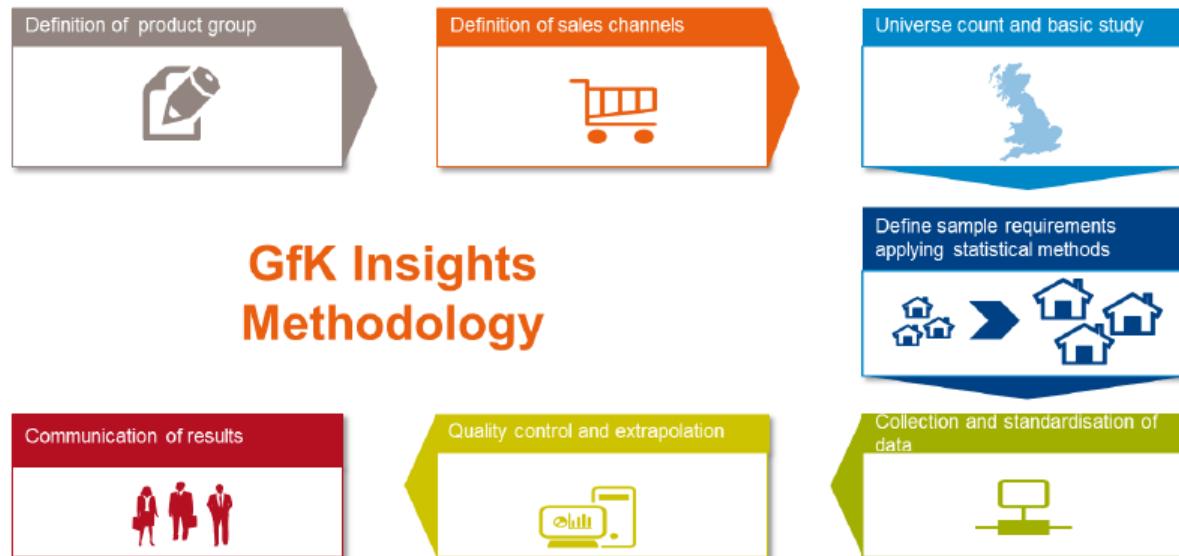
- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end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





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.

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)



Contents www.bmbi.co.uk info@bmbi.co.uk [@theBMBI](https://www.theBMBI.com)

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materials supply



Excellence in building
materials supply

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



Building the Industry & Building Brands from Knowledge



Contact us

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