Excellence in building
materials supply

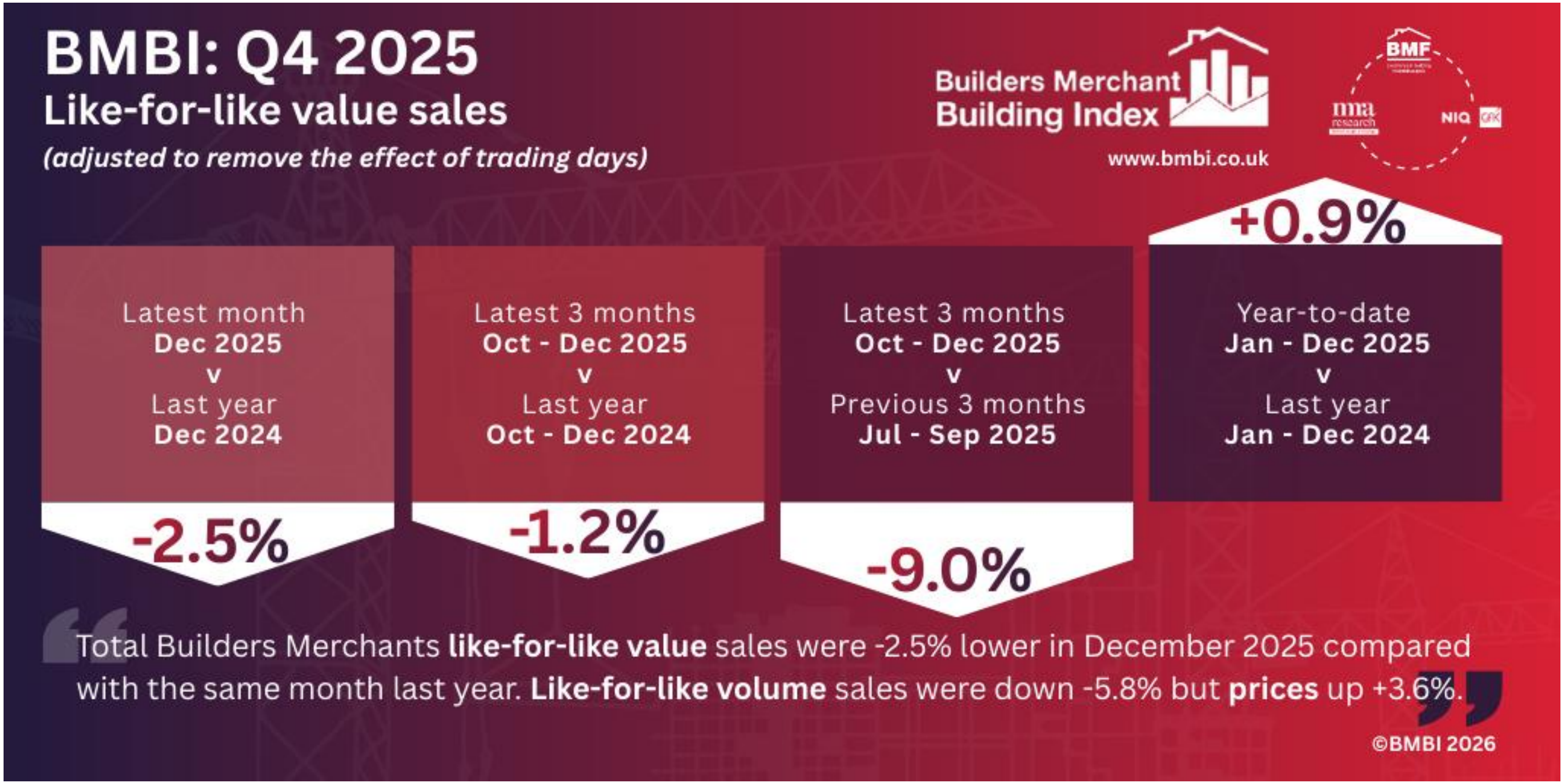
Builders Merchant Building Index

Executive Summary - Quarter 4 2025

(Published 11 March 2026)

Highlights - Like-for-like value sales

(adjusted to remove the effect of trading days)



BMBI: Q4 2025

Like-for-like value sales

(adjusted to remove the effect of trading days)

Builders Merchant Building Index

www.bmbi.co.uk

Latest month
Dec 2025
v
Last year
Dec 2024

-2.5%

Latest 3 months
Oct - Dec 2025
v
Last year
Oct - Dec 2024

-1.2%

Latest 3 months
Oct - Dec 2025
v
Previous 3 months
Jul - Sep 2025

-9.0%

+0.9%

Year-to-date
Jan - Dec 2025
v
Last year
Jan - Dec 2024

> "Total Builders Merchants **like-for-like value** sales were -2.5% lower in December 2025 compared with the same month last year. **Like-for-like volume** sales were down -5.8% but **prices** up +3.6%."

Highlights - Total (unadjusted) value sales

BMBI: Q4 2025

Total (unadjusted) value sales

+3.3%
Latest month
Dec 2025
v
Last year
Dec 2024

-1.2%
Latest 3 months
Oct - Dec 2025
v
Last year
Oct - Dec 2024

-14.6%
Latest 3 months
Oct - Dec 2025
v
Previous 3 months
Jul - Sep 2025

+0.5%
Year-to-date
Jan - Dec 2025
v
Last year
Jan - Dec 2024

> With one more trading day in the latest month, **unadjusted value** sales were +3.3% higher in December 2025 than in December 2024. **Volume** sales were down -0.3% but **prices** up +3.6%.

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 months base period January 2019 to December 2019. This trend series gives the industry access to far more accurate and comprehensive insights than that available to other construction sectors.

Executive Summary

Short of time and just want to read the headlines? Download an Executive Summary that provides a snapshot on value sales and trends from Britain's Builders' Merchants for Quarter 4 and December 2025 here.

BMBI Experts

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 and read their comments on pages 17 to 30 of this report or read their previous comments here**.

Recognition for BMBI

One of the aims of BMBI is to reach across and beyond construction. It's now syndicated to a growing number of trade magazines in different sectors on a regular basis. Outside the industry, economists, banks, consultancies, investment bodies and the big accountants regularly refer to it and BMBI is referenced alongside the Office for National Statistics (ONS) data in the Government **Department for Business and Trade** monthly construction update. **Download the latest update here.**

Department for Business & Trade

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.

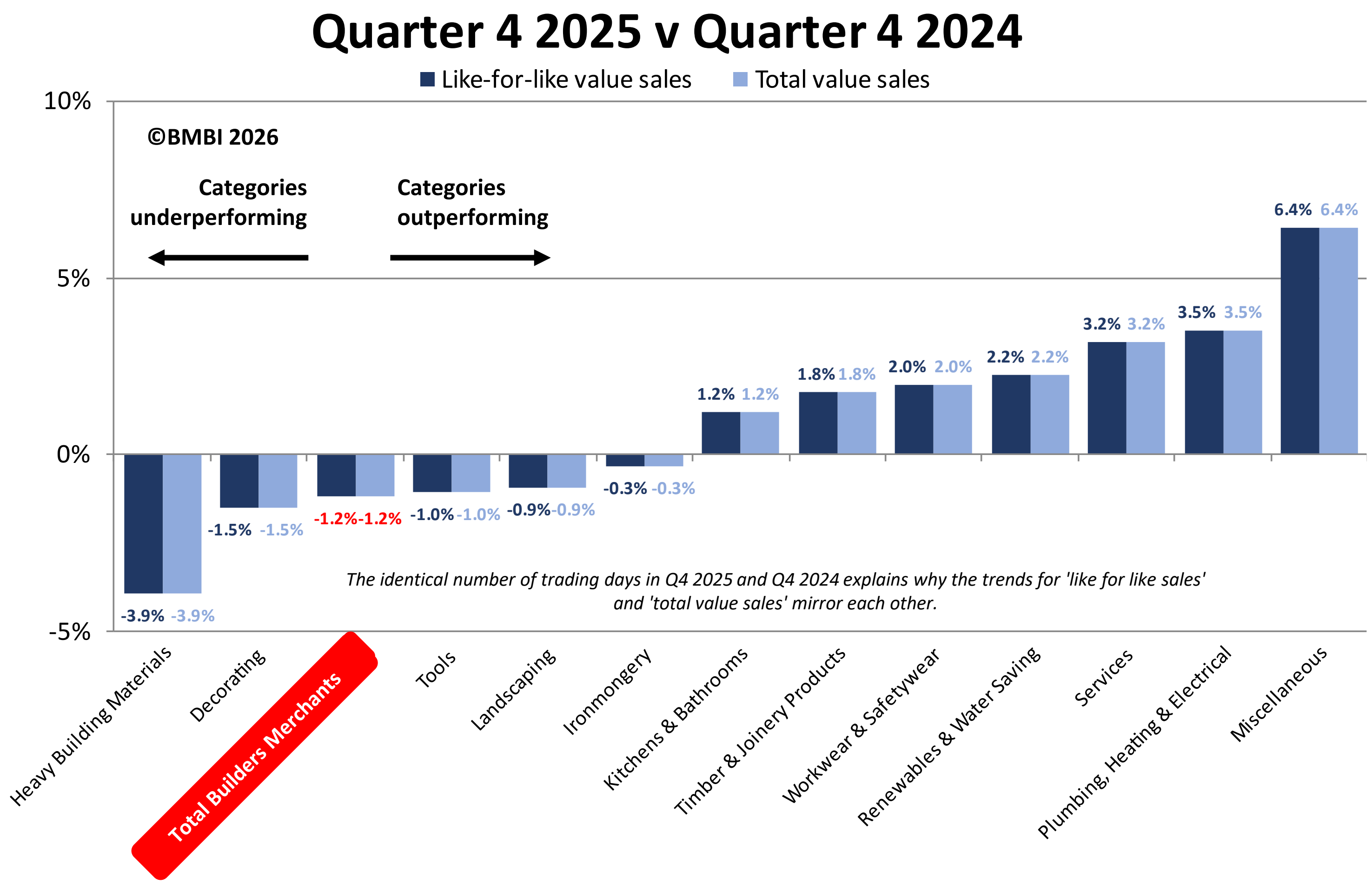
NiQ GfK can also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. Merchants or suppliers who are interested in acquiring data or getting involved should contact **Emile van der Ryst at** emile.vanderryst@nielseniq.com.

Latest quarter v last year

Like-for-like value sales and Total value sales % change

Builders Merchant Building Index

There was no difference in trading days (61).
Like-for-like sales take trading day differences into account.



Quarter 4 2025 v Quarter 4 2024

©BMBI 2026

The identical number of trading days in Q4 2025 and Q4 2024 explains why the trends for 'like for like sales' and 'total value sales' mirror each other.

NIQ GfK

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

Total Builders Merchants **like-for-like value** sales were -1.2% lower in Quarter 4 2025 than in Quarter 4 2024.

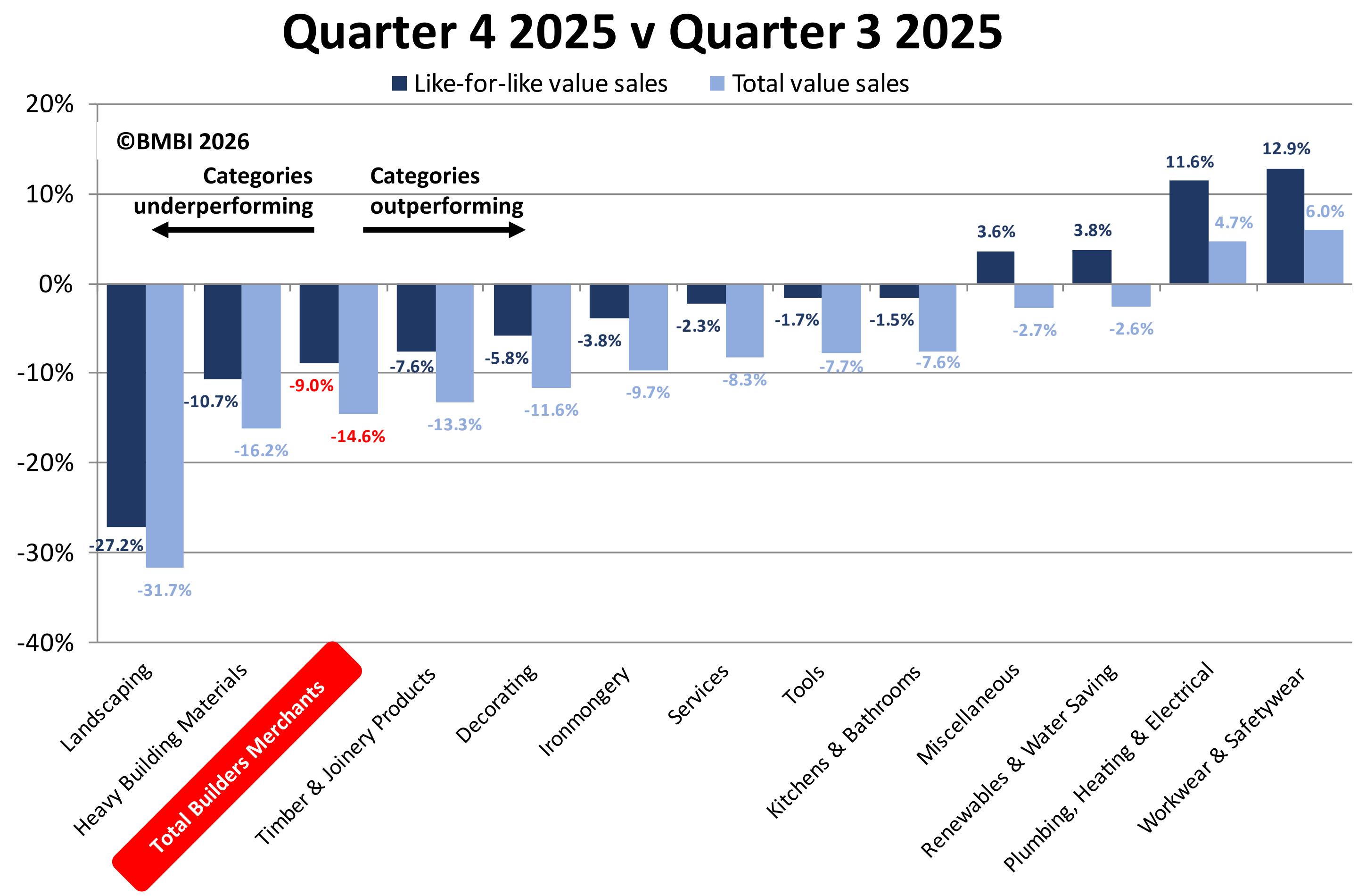
Identical numbers of trading days in Q4 2025 and 2024 explains why Like-for-like sales and Total value sales mirror each other.

Latest quarter v previous quarter

Like-for-like value sales and **Total value sales** % change

Builders Merchant
Building Index

61 trading days this quarter v 65 trading days last quarter.
Like-for-like sales take trading day differences into account.



Quarter 4 2025 v Quarter 3 2025

NIQ GfK

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

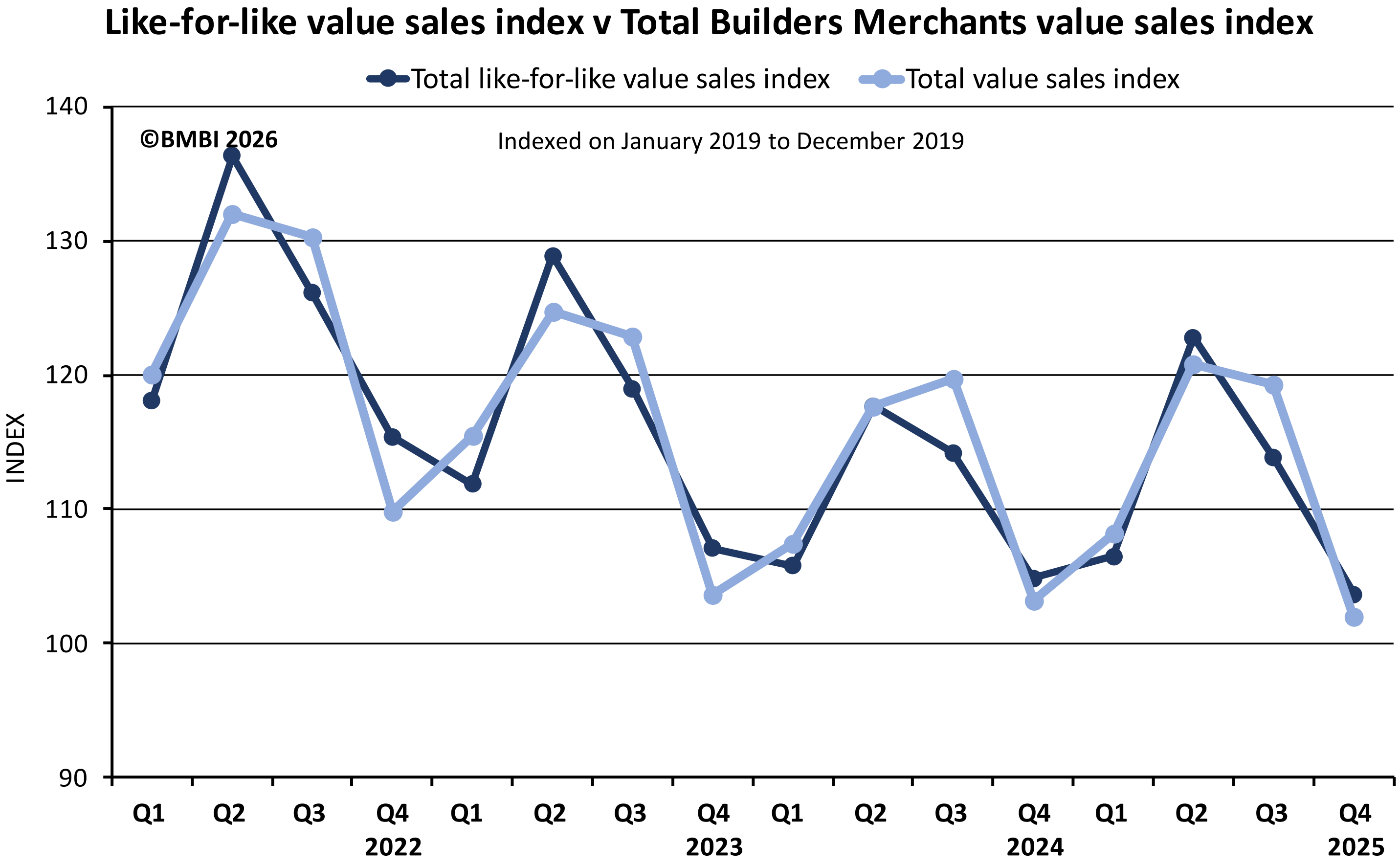
Workwear & Safetywear and Plumbing, Heating & Electrical were the top performing categories.

Landscaping was the weakest.

Quarterly: Index

Like-for-like value sales and **Total value sales** % change

61 trading days in the most recent period v 62 trading days in the Index base period.
Like-for-like sales take trading day differences into account.



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

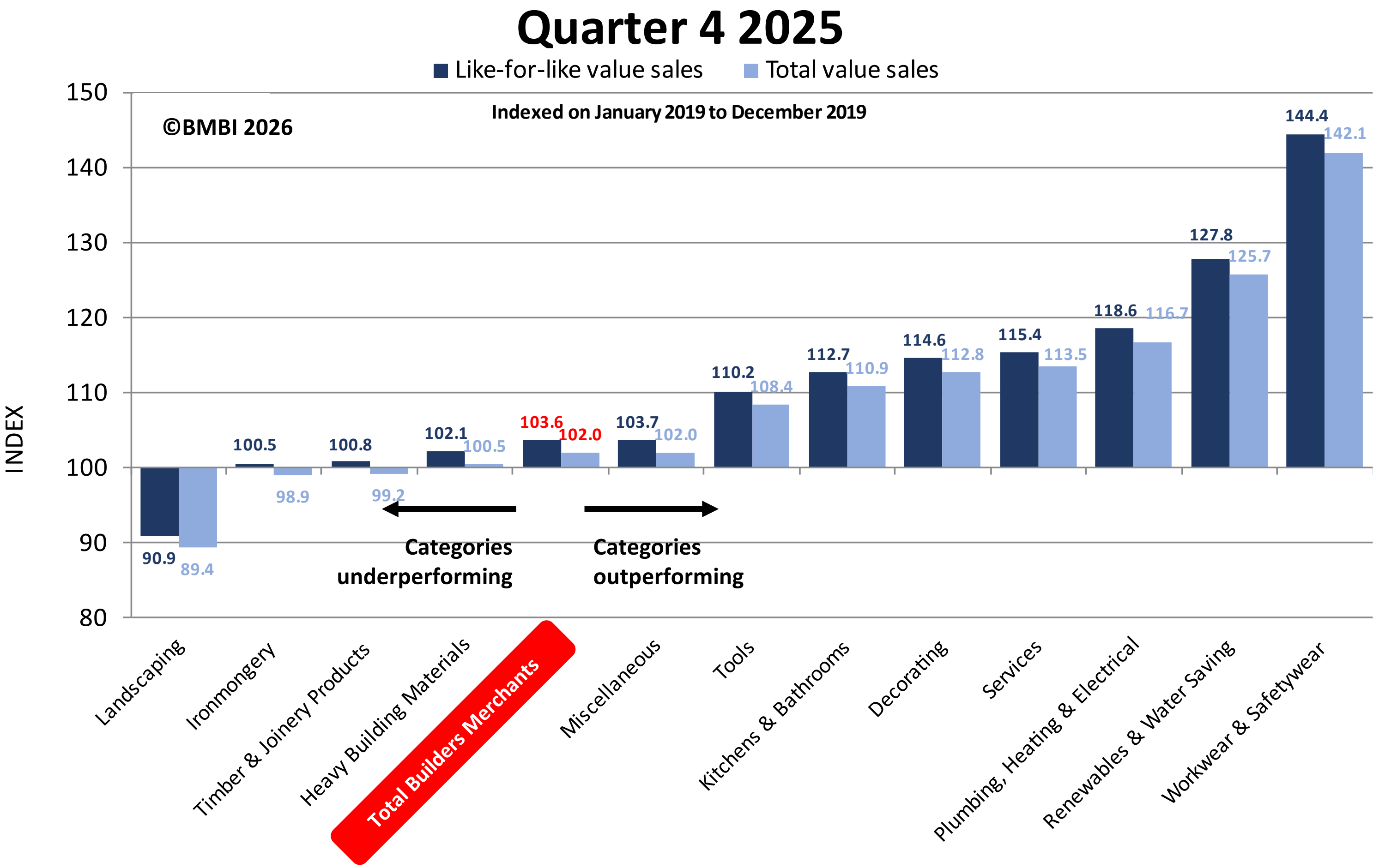
The Quarter 4 BMBI **like-for-like value** sales Index was 103.6.

With one less trading day this Quarter 4 2025 versus the Index base period, the **unadjusted value** sales Index was 102.0.

Latest quarter: Index by category

Like-for-like value sales and **Total value sales** % change

61 trading days in the most recent period v 62 trading days in the Index base period.
Like-for-like sales take trading day differences into account.



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

Workwear & Safetywear and Renewables & Water Saving indexed the most.

Landscaping indexed the least.

Quarterly: Index and Categories

Like-for-like value sales Index:
Quarter 4 2023* to Quarter 4 2025

Indexed on January 2019 – December 2019

QUARTERLY SALES VALUE INDEX	Index	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Total Builders Merchants	100	107.1	105.8	117.7	114.2	104.9	106.5	122.8	113.8	103.6
Timber & Joinery Products	100	103.6	101.2	108.5	107.0	99.1	99.8	114.4	109.1	100.8
Heavy Building Materials	100	108.0	105.8	118.6	116.6	106.3	107.4	123.3	114.4	102.1
Decorating	100	120.0	118.6	129.4	126.2	116.4	114.9	128.6	121.7	114.6
Tools	100	104.8	108.3	116.0	110.7	111.4	111.0	117.0	112.1	110.2
Workwear & Safetywear	100	142.2	140.9	129.0	131.1	141.6	135.8	135.5	127.9	144.4
Ironmongery	100	104.2	103.3	106.8	105.6	100.9	104.5	111.2	104.5	100.5
Landscaping	100	90.5	98.9	143.3	124.0	91.8	101.7	154.3	124.8	90.9
Plumbing Heating & Electrical	100	119.4	116.8	106.0	104.5	114.6	116.8	109.8	106.3	118.6
Renewables & Water Saving	100	138.2	122.9	121.2	117.3	125.0	127.4	138.3	123.1	127.8
Kitchens & Bathrooms	100	116.8	113.7	116.2	111.5	111.4	111.1	118.3	114.4	112.7
Miscellaneous	100	100.7	100.7	98.9	96.9	97.4	104.4	104.3	100.1	103.7
Services	100	108.2	104.6	117.7	116.3	111.9	109.9	122.9	118.1	115.4

*Click the web link below to see the complete series of quarterly indices from Q4 2023.

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

Quarterly: Index and Categories

Total value sales Index:
Quarter 4 2023* to Quarter 4 2025

Indexed on January 2019 – December 2019

Builders Merchant Building Index

QUARTERLY SALES VALUE INDEX	Index	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025
Total Builders Merchants	100	103.6	107.4	117.6	119.6	103.0	108.3	120.9	119.4	102.0
Timber & Joinery Products	100	100.2	103.0	108.7	112.1	97.4	101.5	112.6	114.5	99.2
Heavy Building Materials	100	104.6	107.3	118.3	122.1	104.3	109.4	121.5	120.1	100.5
Decorating	100	116.2	120.2	129.1	132.0	114.2	116.6	126.5	127.7	112.8
Tools	100	101.4	110.0	116.0	116.4	109.9	113.2	115.6	118.1	108.4
Workwear & Safetywear	100	137.6	142.7	128.6	137.0	139.1	138.0	133.4	134.2	142.1
Ironmongery	100	100.8	104.9	106.7	110.6	99.1	106.2	109.5	109.6	98.9
Landscaping	100	87.6	100.7	143.5	130.1	90.3	103.5	152.0	130.9	89.4
Plumbing Heating & Electrical	100	115.5	119.2	106.5	109.8	112.9	119.4	108.8	112.3	116.7
Renewables & Water Saving	100	133.7	124.8	119.7	120.4	122.1	129.0	135.2	127.6	125.7
Kitchens & Bathrooms	100	113.1	116.0	116.8	116.7	109.2	112.9	116.6	120.1	110.9
Miscellaneous	100	97.5	102.3	98.9	101.5	95.9	106.1	102.7	105.1	102.0
Services	100	104.7	105.4	117.0	121.2	109.3	110.9	120.2	122.9	113.5

*Click the web link below to see the complete series of quarterly indices from Q4 2023.

NIQ GfK

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

What’s new in the report? - 1

Mike Rigby, Managing Director - MRA Research

Why are we making the changes?

BMBI, and PHMI, readers will notice a few changes in the way we present builders’ merchant sales data in the reports. One of the aims is to give more prominence to like-for-like sales metrics which, adjusted for trading day differences, give a better and more consistent measure of activity than unadjusted total value sales.

Most merchants use both unadjusted sales values and like-for-like measures, adjusted for trading days, to give them an accurate steer on the market. But this change in emphasis was triggered by requests from national merchants and larger regionals to make more of like-for-like, which is their primary measure of sales trends. Smaller merchants and suppliers tend to use unadjusted metrics as their primary metric.

Following other useful feedback, we’ve made other improvements and will be making more small improvements to the presentation of BMBI, and PHMI, reports in the next few months. If you have any suggestions on these measures, or thoughts on how we can improve our reporting of the data, please get in touch via https://bmbi.co.uk/contact-us/ or, for PHMI, https://phmi.co.uk/contact/.

What is different?

Value sales

Total (unadjusted) value sales – these are value (£) sales that have not been adjusted to remove the effect of trading days. Any % changes between periods will therefore be a combination of movements in £ sales as well as the differences in trading days (if there are any).

The BMBI and PHMI summaries and reports have always included this measure of value sales and will continue to do so.

Like-for-like value sales – these are value (£) sales that have been adjusted to remove the effect of trading day differences between periods. You can be confident, therefore, that any % changes between periods are due to movements in £ sales rather than differences in the number of trading days.

Although the BMBI and PHMI reports have always included like-for-like value sales, a recent change is that we are bringing this measure more to the forefront of our summaries and reports and we now consider it to be the lead measure.

…Like –for-like sales value and sales volumes to be the lead measures

What’s new in the report? - 2

Mike Rigby, Managing Director - MRA Research

Volume sales
Total (unadjusted) volume sales – these are volume (unit) sales that have not been adjusted to remove the effect of trading days. Any % changes between periods will therefore be a combination of movements in unit sales as well as the differences in trading days (if there are any).

The BMBI and PHMI summaries have always included this measure of volume sales and will continue to do so.

Like-for-like volume sales – these are volume (unit) sales that have been adjusted to remove the effect of trading day differences between periods. You can be confident, therefore, that any % changes between periods are due to movements in unit sales rather than differences in the number of trading days.

This will be a new measure in the BMBI and PHMI summaries from the Q4 2025 reports.

Price
Price is a Unit Sales Price, calculated from the Value (£) sales and Volume (units) sales. The appropriate unit varies by category. For example, units can be containers, pallets, packs, bags, cans of paint, rolls of insulation, lengths, boards or sheets of drylining.

Total (unadjusted) price – this is the unit sales price calculated from the Total (unadjusted) value sales and Total (unadjusted) volume sales.

The BMBI and PHMI summaries have always included this measure of price and will continue to do so.

Like-for-like price will always equate to total unadjusted price.

This will be a new measure in the BMBI and PHMI summaries from the Q4 2025 reports.

We will be making more improvements to the presentation of BMBI, and PHMI, reports in the next few months...

Overview and Insights - 1

Emile van der Ryst,

Key Account Manager – Trade & DIY – NiQ GfK

There is no denying that 2025 has been a very challenging year for the Builders Merchants sector. Much has been made of all the ongoing challenges on a wider level, whether that is macroeconomic, geopolitical, insufficient government assistance or prohibitive regulatory frameworks. Despite this the year has still ended in value growth of +0.5%, which is a testament to the dedication and hard work by both merchants and tradespeople.

Both volume and average price shifts have been relatively flat, sitting at +1.5% and -1.0% respectively. Of more concern is the quarterly value growth trend compared to the previous year. Both Q1 and Q2 were positive at +0.7% and +2.6% respectively, but there has now been two consecutive quarters of decline, with Q3 down by -0.3% and Q4 decreasing further to -1.2%.

Heavy Building Materials ended the full year with a value decline of -0.5%. Volume was up +1.2% and average price down by -1.7%. The main contributors to these declines were blocks, insulation, plasterboard and roofing products. Aggregates, bricks and cement were key areas of growth. Q4 itself was down -3.9% against 2024 Q4, with blocks and roofing product especially affected. One positive to note has been volume growth for both aggregates and insulation in Q4.

Timber & Joinery and Landscaping both managed to see full year value growth, ending 2025 at +1.6% and +2.5% respectively. The underlying data for the former shows timber being one of the best performing areas across all subcategories, with both volume and average price growing. Cladding also had a positive year, while doors, roof windows and sheet materials all saw declines within Timber & Joinery. For Landscaping almost all of its subcategories saw growth this year, with the best performing being fencing & gates. It is however worth mentioning that Landscaping Q4 value was down by -0.9% against 2024 Q4, again highlighting a difficult quarter for the whole sector.

Renewables & Water Management was the best performing category for the year, increasing by +5.7%. Plumbing, Heating & Electrical was up by +1.8%, while Services also increased by +3.1%. Both were also the best performing categories in Q4. The underlying data in the former shows boilers, tanks, heating equipment and heat pumps being areas that contributed to growth in 2025. Decorating was the category with the largest value decline in 2025, down by -2.6%.

2026 has continued on the challenging path seen in 2025, with any form of growth likely to be seen as a win by merchants. Downwards revised figures by the CPA only confirms that, while the weather in January and February has already not helped. There is hope that 2026 could improve as the year progresses, but for this to happen there would need to be drastic changes in some of the global and local issues currently experienced.

Overview continues on the next page…

> 2026 has continued on the challenging path seen in 2025.
>
> Any form of growth is likely to be seen as a win by merchants.

Overview and Insights - 2

Emile van der Ryst,

Key Account Manager – Trade & DIY – NiQ GfK

… continued from the previous page:

Regular readers will note minor changes in historic growth figures in this month's report. This is due to NiQ enhancing the dataset in collaboration with selected merchant partners to improve alignment and consistency across the data.

This joint effort, made possible through NiQ's quality-assurance processes and merchant engagement, has robustness, credibility, and overall quality as its main function, with the aim of providing the BMBI's readership with the highest level of confidence when reading the report.

> …minor changes in historic growth figures in this month's report.
>
> This is due to NiQ enhancing the dataset in collaboration with selected merchant partners to improve alignment and consistency across the data.

Coverage and data audits

As part of its ongoing drive to ensure the most accurate and relevant understanding of market coverage NiQ GfK conducts universe studies every couple of 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% and revised up to 92% in the October 2023 report with the introduction of CMO, Huws Gray and JT Dove.

NiQ GfK has 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

NiQ GfK has completed its latest universe study for the builders' merchant channel and estimates coverage is 88%.

Merchants' View

John Newcomb, CEO - BMF

A worrying message from BMF members in recent months is that current trading conditions resemble those after the 2008 market crash. Consumer confidence remains very fragile, and with fewer people moving home or entering the housing market, demand across the supply chain is subdued.

We have also seen a sharp increase in insolvencies and companies going into administration, with the number of affected member companies in 2025 alone nearly matching the total over the previous four years. In line with this, insolvency specialists Begbies Trayner Group report that the number of construction sector businesses experiencing critical distress in Q4 2025 rose by 46% year-on-year.

The latest figures from the Office for National Statistics (ONS) estimate that total construction output in Great Britain declined by 2.1% in Q4 2025 compared with Q3, mainly due to a 3.6% drop in private sector housebuilding. New work decreased by 2.6%, while repair and maintenance fell by 1.5%.

The most recent UK Construction Monitor from the Royal Institution of Chartered Surveyors (RICS) shows that while overall activity remained broadly flat in the final quarter, this was largely due to stronger infrastructure workloads. Elsewhere, conditions remained challenging. Private commercial and industrial workloads remained in negative territory, and private housing activity weakened again in Q4, with financial constraints and planning pressures cited as key concerns.

Meanwhile, the Home Builders Federation (HBF) has released research highlighting a growing housing affordability crisis – despite high demand for homes, millions are unable to turn that demand into actual purchases. The proportion of households owning their homes peaked in 2003 at 71%. By 2024, ownership had dropped to 64. 8%. Adjusted for population growth, the HBF states that this represents more than 1.5 million households that would currently own a home if early 2000s ownership levels had been maintained. They are urging the Government to introduce a new targeted equity loan scheme for first- time buyers.

Providing building materials for housing - whether for new builds or RMI - remains a core part of our sector. It's difficult to envisage significant growth in these markets without a return of consumer confidence, which government support for first-time buyers could help promote.

> ....current trading conditions resemble those after the 2008 market crash.
>
> Consumer confidence remains very fragile, and with fewer people moving home or entering the housing market, demand across the supply chain is subdued.

The Experts

Speaking for their markets

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.

Scroll down to read their latest insights.

Expert Panel

Natural Stone & Porcelain Paving

(Part of Landscaping)

PAVESTONE

Krystal Williams, Managing Director Pavestone UK, is BMBI's Expert for Natural Stone & Porcelain Paving.

After finishing 2025 with an 8% increase in volumes, the sales forecast for paving for the year ahead is looking flat.

In my last comment I mentioned the unprecedented rainfall in India which has flooded sandstone quarries in the north of the country. As I write this, the mines are yet to reopen and we are currently looking at the end of February before processing of new stone in India begins.

The disruption to India's supply chain in H1 is going to be significant, and this is driving up the price. Porcelain – once the premium paving offer – is now cheaper per metre than sandstone. With shipping increases also expected over the next few months, we don't expect the price of sandstone to come down in 2026.

Supply chain issues such as these are out of our hands, but planning and preparing for the challenge ahead is the way forward.

We spent most of Q4 visiting merchants to explain the situation on the ground in India and to encourage them to plan ahead and ensure they have good stocks going into Q1. Many have heeded our honest advice; some were told that other suppliers have enough stock to last until Q3. This seems unlikely, as that's enough paving to fill Wembley Stadium several times over!

As well as being open with customers, we are further preparing against shortages on key product lines with new porcelain alternatives to our sandstone bestsellers. These have the look of natural stone, which is very on trend this year, but with all the benefits of porcelain such as slip, frost and algae resistance. There is also growing interest in new clay paving, which has good availability.

How much of a problem Indian sandstone shortages will be largely hinges on what the RMI market does this year. The latest GfK Consumer Confidence Index for January 2026 indicates that people are positive about their own finances, albeit less so about the economy, and the Major Purchase Index is up 1 point on December 2025, and it's 10 points better than January 2025. People want to spend their money but will that major purchase be a new garden or an outdoor space.

> War in the Middle East will cause problems with supply and pricing. It's too early to say the market will be flat, but there is real potential for this to be a challenging year for landscaping.

Expert Panel

Steel Lintels

(Part of Heavy Building Materials)

Derrick McFarland, Managing Director Keystone Lintels is BMBI's Expert for Steel Lintels.

There were few surprises in Q4 2025, as the steel lintels market followed a familiar seasonal pattern. Activity eased in the usual November and December slowdown delivering a noticeable reduction in volumes. While this drop is typical for the final quarter, it highlights how fragile confidence is across the housing sector.

Compared with the same period last year, performance was broadly stable, pointing to a market that is holding its position rather than gaining momentum. Enquiry levels indicate there is still work in the pipeline, but order values remain modest and decision-making cautious. Housebuilders continue to grapple with affordability pressures, planning delays and cost uncertainty, all of which constrained output through the latter part of the year.

The economic backdrop has done little to improve sentiment. The late Budget offered limited support or incentives for construction. Ongoing volatility in the steel market has added further pressure, influencing procurement behaviour and reinforcing a defensive approach to buying. As a result, the outlook for early 2026 remains uncertain, with the first quarter, and potentially into Q2, likely to feel unsettled as confidence slowly rebuilds.

That said, there are reasons for cautious optimism. The economy is beginning to stabilise, with easing inflation and improving borrowing conditions starting to support household confidence. While this is unlikely to translate into a rapid uplift in activity, greater stability should help underpin demand over time. Encouragingly, private new home registrations suggest that intent within the sector remains, even if delivery continues to lag in the short term.

Regulation remains a key consideration. Although the Future Homes Standard has been delayed, its direction is unchanged. Increased focus on building fabric and reducing heat loss is already influencing specification decisions. Practical, fabric-first solutions such as Keystone's Hi-Therm lintels provide a straightforward, low-cost way for housebuilders to improve thermal performance while preparing for future requirements.

It's tempting for merchants to reduce stock levels during quieter periods, but those who maintain the right breadth and availability will be best placed to support builders when demand returns. He who dares, wins. Collaboration across the supply chain, sharing enquiries and supporting customers will be critical as we move through early 2026 and position for more sustainable growth later in the year.

> It's tempting for merchants to reduce stock levels during quieter periods, but those who maintain the right breadth and availability will be best placed to support builders when demand returns.

Expert Panel

Drylining Systems

(Part of Heavy Building Materials)

Gordon Parnell, Sales Director, British Gypsum, part of Saint-Gobain Interior Solutions, is BMBI's Expert for Drylining Systems.

The UK construction industry remains in a period of adjustment. Economic pressures, cost volatility and subdued activity across residential and commercial sectors continue to shape short-term conditions and the sluggish economy is restricting the immediate opportunity for growth, with project starts decreasing across Q4 in the commercial sector. However, there are clear indicators of long-term opportunity as confidence gradually rebuilds and investment begins to align with future demand.

Infrastructure, public sector and energy-related projects continue to provide resilience, underpinned by sustained government commitment and the drive to modernise the built environment. At the same time, regulatory change and evolving client expectations are sharpening the focus on performance, quality and sustainability, particularly within internal fit-out and interior systems. From a drylining perspective, these priorities place increased importance on solutions that deliver reliable fire protection, acoustic performance, durability and reduced environmental impact. Whether in new build or refurbishment, internal systems play a critical role in achieving compliant, high-performing buildings, and demand remains strong for products and systems that offer certainty throughout the build process.
Forecasts for 2026 suggest that confidence is expected to improve as infrastructure programmes progress and modern methods of construction continue to gain traction. These approaches offer opportunities to improve productivity, reduce waste and support more consistent build quality across the sector. We also wait for the government to consider further growth initiatives.

Alongside economic pressures, the industry continues to face a growing skills gap, particularly within specialist trades such as drylining. An ageing workforce and limited new entrants present a risk to long-term capacity, quality and safety. Addressing this challenge will be essential to supporting recovery and future growth.
British Gypsum believes skills development is fundamental to building resilience across the industry. Through its network of dedicated training centres across the UK, the business is investing in practical, hands-on learning that supports installers, site professionals and specifiers. By bridging the gap between specification and installation it helps ensure systems perform as intended on site, while promoting safer, more efficient construction practices.
As the sector continues to evolve, British Gypsum remains focused on innovation, collaboration and education. While 2025 has been a period of transformation, it has laid the foundations for a more skilled, sustainable and confident construction sector as we move into 2026 and beyond.

> In new build or refurbishment, internal systems play a crucial role in achieving compliant, high-performing buildings...
>
> ...and demand remains strong for products and systems that offer certainty throughout the build process.

Expert Panel
Mineral Wool Insulation
(Part of Heavy Building Materials)

Neil Hargreaves, Managing Director Knauf Insulation is BMBI's Expert for Mineral Wool Insulation.

Twenty twenty-five was not the year construction anticipated. Prolonged uncertainty led to lower levels of housebuilding, and while November's budget provided welcome clarity, it also brought the cancellation of the ECO scheme.

Over its lifetime, ECO delivered improved insulation in well over a million homes, yet recent quality issues driven by poor scheme design and oversight must be corrected if its just-published replacement, the Warm Homes Plan, is to deliver for households. Signs for optimism include a reformed Energy Performance Certificate that may allow installers to differentiate their work on quality rather than just price. A concern remains though that the Plan may jump to solely deploying alternative technologies such as heat pumps. A well-insulated home is a comfortable, affordable, low-energy home. Insulation must remain central to any Warm Homes Plan.

The Future Homes Standard is the other signature demand-driving legislation. Publication is imminent at the time of writing, but we can already draw some conclusions on how it will affect merchant sales.

First, wider walls. 150mm wall cavities are becoming the new normal in masonry construction. Sixty six percent of builders already have plans to build with 150mm cavities when the Future Homes Standard comes into effect, with a further 23% considering it*. Because of the performance it offers to the building and the builder, we expect most of those cavities to be fully filled with mineral wool insulation, often premium products with a lower lambda value.

Second, deeper lofts. Two layers of loft insulation, 270mm deep has been the baseline for over a decade, but builders are increasingly going far beyond that, adding a third layer of insulation to reach up to 500mm. This trend started with Part L 2021, with large housebuilders finding more efficient lofts an easier win in their overall compliance calculations. We expect it to be an even more popular choice under the Future Homes Standard.

Habits are changing, and with that comes opportunities for merchants. To increase the volume and value of the insulation they sell, and the accompanying ancillaries, to enable the new normal.

**Survey of Professional Builder readers, conducted Q4 2025*

> 150mm wall cavities are becoming the new normal...
>
> Because of the performance it offers to the building and builder, we expect most of those cavities to be fully filled with mineral wool insulation, often with premium products with a lower lambda value.

Expert Panel
Cement & Aggregates
(Part of Heavy Building Materials)

Andrew Simpson, Packed Products Director at Heidelberg Materials, is BMBI's Expert for Cement & Aggregates

Quarter four sales were lower than expected, as an already challenging quarter rounded off with a disappointing December. A lack of confidence in the market and persistent rain saw many people packing up early for Christmas, impacting volumes.

The Mineral Products Association's latest report confirms the downturn in mineral product sales. Ready-mixed concrete volumes edged up +0.9% in Q4 compared to Q3 but for 2025 as a whole, volumes were down -9.9% to 11 million cubic metres. A further drop from 2024's previous 60-year low.

Aggregates fell -1.6% in 2025 – a fourth consecutive year of decline – while asphalt finished the year -1.1% down. Mortar sales, closely linked to housebuilding, lost momentum in Q3 and Q4, limiting the annual increase to +5.2%.

It's little surprise then that the Construction Products Association (CPA) revised down its forecasts for construction output in 2026 from +2.8% to +1.7%. The forecast suggests new housing starts and large commercial tower projects will be subdued until the end of 2026, while infrastructure activity will increase.

In my opinion, we'll be lucky to hit +1.7% growth on heavy building materials this year; the signs are its going to be another flat year for volumes. Housebuilding, infrastructure and RMI all need to pick up to pull the sector out of this inertia. After an underwhelming Autumn statement, we can only hope for more government stimulus for construction in the Spring budget, such as a renewed Help to Buy scheme to boost consumer and market confidence and get housebuilding moving again.

While we wait for the government to come good on its promises to the construction sector, we are focusing on our sustainability commitments. Our project in Padeswood to produce the world's first carbon captured near-zero cement on an industrial scale is powering ahead, and we expect the facility to be operational by 2029.

To promote what we are doing to reduce embodied carbon, we recently opened our evoHub in London. Here, legislators, specifiers and customers can learn about decarbonisation in construction, and we'll be hosting events throughout the year including CPD presentations, seminars and Meet the Expert drop-in sessions. Come along and learn more about the future of construction!

After an underwhelming Autumn statement, we can only hope for more government stimulus for construction in the Spring budget, such as a renewed Help to Buy scheme to boost consumer and market confidence and get housebuilding moving again.

Expert Panel
Fasteners and Fixings
(Part of Ironmongery)

Ian Doherty, Non-Executive Director of Hexstone, and the Owlett-Jaton brand is BMBI's Expert for Fasteners & Fixings

Demand within the fasteners and fixings sector continues to mirror wider merchant trends, with the construction market experiencing its longest sustained downturn since the financial crisis. While 2025 saw a modest increase in volumes across all fastener and fixing product groups, supported by continued growth in Q4, this improvement was not matched by profitability. Although prices stabilised for the first time during the year, this did not translate into meaningful margin recovery.

In a market where both sales value and volume remain under significant pressure, the central challenge is to maximise returns from the sales opportunities that remain. Looking to 2026, the outlook for fasteners and fixings is expected to follow a similar trajectory, closely linked to trends in manufacturing and the construction sector. There are reasons for cautious optimism. The Government's ambition to deliver 300,000 new homes during this parliamentary term, while unlikely to be fully realised, should still result in meaningful progress that supports demand.

For Owlett-Jaton, brand development remains a core focus. This includes the continued strengthening of existing brands, alongside the evaluation and introduction of new products designed to meet evolving market needs driven by changes in regulation, compliance, and statutory requirements. Momentum behind the Data Yard initiative, led by BMF and NMBS, is encouraging and increasingly aligned with the needs of the industry. Data Yard has the potential to simplify and ensure merchants have access to consistent, reliable information to better serve their customers, and Owlett-Jaton is proud to be an early adopter of this important initiative.

Compliance is a growing and complex challenge, with acronyms such as CBAM, EPD, DPP, CE, UKCA, TDS and ADD commonplace across the sector. As a supplier of more than 30,000 SKUs, staying ahead of these requirements is costly and time-intensive. To address this, Owlett-Jaton has invested heavily in the development of a comprehensive in-house Product Information Management (PIM) system, enabling a more efficient and structured approach to compliance management - no small undertaking at this scale.

Digital Product Passports (DPPs) are also approaching implementation. While the precise scope and requirements are yet to be fully defined for fasteners and fixings, Owlett-Jaton continues to enhance its PIM capabilities, expand batch-level data capture, and strengthen traceability processes to ensure long-term readiness.

> Demand within the fasteners and fixings sector continues to mirror wider merchant trends, with the construction market experiencing its longest sustained downturn since the financial crisis.

Expert Panel

Paint

(Part of Decorating)

Jamie Barber, UK&I Sales Director Trade; Dulux Trade is BMBI's Expert for Paint

The UK Trade Decorative Paint market delivered a broadly stable performance in 2025, demonstrating resilience against a backdrop of mixed economic conditions and continued pressure on construction activity.

For Q4 2025, the market closed with a modest +0.1% growth year on year, reflecting a relatively flat but steady end to the year. Despite a number of headwinds, the category achieved a +1.2% increase for the full year 2025, compared the previous year, confirming a gradual return to growth following a period of subdued demand.

A key driver behind this positive trajectory has been the sustained performance of Premium Emulsions, particularly products positioned around durability and elevated aesthetic finish. Ranges offering enhanced washability, long lasting colour, and superior application quality such as Dulux Trade Diamond Matt and Dulux Heritage continue to drive the market with appliers and clients seeking performance, longevity, value and reliability even in cost conscious segments.

Alongside premium products, second quality emulsions also contributed to market growth. This segment benefited from incremental improvements in the new build and RMI extensions sector, where activity, though still below historical norms, showed slight improvement in 2025. Fragile optimism remains on the New House Build market.

Within Lightside materials, decorative products continue to provide merchants with the opportunity to drive value, including additional sales of associated products increasing total basket spend, and with solutions to meet their customers' needs as a one stop destination.

Looking ahead, the forecast for 2026 indicates a small but positive level of growth, with expectations that stabilising economic conditions and incremental recovery in construction activity will support continued momentum. Premium Emulsions are expected to remain the primary value driver, while improvements in new build starts and home improvement sentiment may further benefit the wider emulsion category.

Overall, the UK Trade Decorative Paint market enters 2026 with cautious optimism: modest growth anticipated, strengthened by ongoing demand for premium performance coatings and a gradually improving backdrop in the building and renovation sectors.

> This segment benefited from incremental improvements in the new build and RMI extensions sector, where activity, though still below historical norms, showed slight improvement in 2025. Fragile optimism remains on the New House Build market.

Expert Panel
Roof Windows
(Part of Timber & Joinery Products)

Jim Blanthorne Managing Director of Keylite Roof Windows is BMBI's Expert for Roof Windows

The overall market continues to be a challenge, with impossible-to-forecast peaks and troughs. It's been like that in recent years. Something else we can blame on Covid!

Roof windows had a good Quarter 4, with a strong October and December and weaker November. No one has a creditable explanation as to why. It's just put down to one of those things!

Brick volumes are significantly down, and housing starts have been disappointing, but as we have experienced throughout 2025, housebuilder demand for roof windows has been encouraging, although Keylite has outperformed the market. The new products we launched specifically for house builders are beginning to gain traction.

Winning orders in a tough market is never easy, and everyone in our market is working harder. But being resilient, focused and driven are key attributes, and speaking for ourselves, Keylite thrives as a challenger brand. Our sales team are extremely active, focusing on the core activities that will deliver the numbers. Working smart, impacting orders and supporting our various trading partners.

Interest rates are expected to fall, but not to the levels of recent years. This will create more demand for room-in-a-roof products such as roof windows, and associated products that create additional, affordable, value-adding living space. Families are growing, the population is rising and people are living longer. The requirement for more, for bigger, for better is not going away. We have no choice but to find solutions to build more and meet future demand. It can't be put on hold much longer!

Human beings have a canny knack of finding money when they need to, and I'm positive that we will see a strong H2 to make 2026 a good year for the market. That's subject of course to the uncertainties and distractions of continuing political unrest worldwide. Let's hope it calms down and stabilises quickly.

Weather is a huge challenge for construction and, as I write, the relentless rain continues. That's not good for a roofing product! Positivity is the word! It won't solve everything, but it will get us all on the front foot again, with a strong mindset. And guess what……… we might achieve our collective ambitions.

> The requirement for more, for bigger, for better is not going away.
>
> We have no choice but to find solutions to build more and meet future demand. It can't be put on hold much longer!

Expert Panel

Website & Product Data Management Solutions

ECI Software Solutions is BMBI's Expert for Website & Product Data Management Solutions

The digital transformation of the merchant sector has been gathering pace, and this is set to go up another level in 2026, as merchants evolve and adapt to the needs of customers and suppliers, and pre-empt legislative changes.

In the Q4 report, we commented on the launch of Data Yard – a centralised platform created by the BMF and NMBS to share product data seamlessly across the industry. Thirty more suppliers have completed the onboarding process since then. There were also further partnership announcements as two more ERP providers committed to collaboration and compatibility for the benefit of the whole supply chain.

For a sector which has been rooted in traditional tried-and-tested ways of operating, Data Yard demonstrates the enormous capacity merchants, and their suppliers and partners have to embrace digitalisation. We expect to see more of this as the adoption of Artificial Intelligence (AI) and advanced digital solutions accelerates.

There is a lot of hype around AI, and rightly so, as it is reshaping the technology landscape across many different industries and applications. But it shouldn't be used for the sake of it. AI is most effective when it provides practical help and actionable insights for day-to-day operations.

ECI Software's industry-specific AI-powered solutions – recently recognised with a Frost & Sullivan award – embed autonomous and assisted intelligence into workflows and offer capabilities with clear purpose. These are not solutions in search of a problem. The breadth of products reflects the possibilities AI presents across the many aspects of the building supply chain from AI-generated bills of materials and the automated assessing and prioritising of warranty requests, to improving service levels through AI-powered service calls and AI-driven sentiment tagging to understand what your customers value.

AI-optimised insights for e-commerce also provide a valuable tool for merchants to spot purchasing trends, highlight top buyers and optimise content to improve visibility, engagement and conversion rates. The result is a clear impact on the bottom line, with increased sales, customer satisfaction and retention.

When implemented with clear purpose and a problem-solving mindset, AI and digital tools are practical solutions that merchants and their supply chain can utilise to work smarter – not harder – to stay competitive and profitable at a time when margins are under increasing pressure.

The digital transformation of the merchant sector has been gathering pace, and this is set to go up another level in 2026, as merchants evolve and adapt to the needs of customers and suppliers, and pre-empt legislative changes.

Expert Panel
Plumbing & Drainage

Chris Dawson, Sales Director at Brett Martin is BMBI's Expert for Plumbing & Drainage

There can be few construction material categories that closed the 4th quarter of 2025 with a positive spin. The Heavy Building Materials segment remained in the same state of malaise seen in the previous quarter. Unfortunately, the key stats don't lie and without any significant sustained stimulus from consumer confidence or macroeconomic events then it would have been foolish optimism to expect any great change at the coal face.

With flat industry forecasts for 2026, a stimulus is required for housebuilding, with a focus on the public housing sector, the demand for which does not rely on consumer confidence or interest rate trends. If the Government is serious about digging the country out of the housing crisis affecting so many regions, then a radical change in the funding model is required to enable both Housing associations and Councils.

In 2024, a Centre for Economics and Business Research report on the effects of building 90.000 social homes in Great Britain projected a combined socioeconomic value estimated to be £51.2 billion. This would create a total of 350,000 jobs and deliver a net £12 billion positive return to the exchequer over 30 years.

Unfortunately, a lack of vision and our system of short-term planning mean this type of intervention remains a pipe dream (pardon the pun!)

In the meantime, the merchant industry appears to be coming to terms with the probability that 2026 will be a repeat of 2025. Historically this trading pattern has exposed the industry to the dangers of chasing volume and the inevitable consequences of a race to the bottom. Merchants and manufacturers are still at risk from increasing operating costs, and uncertainty still surrounding tariffs and energy costs.

It will take steady hands and a focus on adding value throughout the entire supply chain, for the industry to avoid the most negative effects of this sluggish market. To combat this, Brett Martin is investing in customer support systems to enable our teams to work quicker and smarter to deliver enhanced customer experiences with a focus on delivering value.

> Historically this trading pattern has exposed the industry to the dangers of chasing volume and the inevitable consequences of a race to the bottom.
>
> Merchants and manufacturers are still at risk from increasing operating costs, and uncertainty still surrounding tariffs and energy costs.

Expert Panel

Plastic Plumbing for Hot and Cold Water Systems

Matt Williams, Managing Director of Polypipe Building Products is BMBI's Expert for Plastic Plumbing for Hot and Cold Water Systems

As we approach the much-anticipated implementation of the Future Homes Standard (FHS), the UK residential construction sector is at a critical crossroads. The FHS mandates a 75-80% reduction in carbon emissions for new dwellings, effectively signalling the end of the gas boiler era in favour of Air Source Heat Pumps (ASHPs). The industry is seeing a shift in procurement patterns that suggests housebuilders are moving from planning to practice. The transition isn't just about the external unit; it is about the internal plumbing infrastructure required to make low-carbon heating viable across the country's housing stock.

The most telling indicator of this shift is the recent uptick in demand for larger diameter piping systems. While 10mm has been the domestic standard for decades, we are witnessing a marked increase in 15mm feeds. This is a direct response to the physics of low-carbon heating. Because heat pumps operate at lower flow temperatures (typically under 55°C), they require a higher flow rate to deliver the same thermal energy. To maintain efficiency and avoid system noise or pump strain, larger internal pipe diameters are essential.

Our (Polypipe Building Products) internal data aligns with these industry observations. We have seen a marked shift in 15mm plastic plumbing in the last 12-18 months, suggesting that developers are up-sizing internal networks to future proof their developments. With almost half of housebuilders now identifying the FHS as their primary design driver. This trend indicates that the industry is moving beyond mere compliance. By embracing larger diameter systems today, housebuilders are ensuring homes are truly "zero-carbon ready," providing homeowners with efficient, future-proofed comfort.

The year 2024 ended with expectations based on an improving first half and a government with a mandate to put housing first and a parliamentary majority to implement it. But while 2025 struggled to get off the ground, January 2026 has started in a better place. Businesses and consumers are not confident in the prospects for the overall economy or the management of it, but they are confident in their own prospects and in their ability to manage their way forward. The industry is looking to grow modestly in 2026.

> Businesses and consumers are not confident in the prospects for the overall economy or the management of it...
>
> ...but they are confident in their own prospects and in their ability to manage their way forward.

Expert Panel
Softwoods & Engineered Wood

James Davenport, Managing Director of Metsä Wood UK is BMBI's Expert for Softwoods & Engineered Wood

The fourth quarter of 2025 can be summed up as a period of, one, low activity levels, two, an abundance of caution being shown by all, and three, a rush to close out the year and come back to start afresh in 2026.

Demand from construction sites for engineered timber products slowed at the back end of the fourth quarter and businesses also took proactive steps to reduce their inventories in the run up to their financial year ends, which resulted in poor delivered volumes. There are still pockets of activity in certain regions, and surely this linked to affordability. Could it be that in 2025 we actually ended up building fewer new homes than in 2024?

There is still demand for softwood products in the market. Projects are being started and, of course, the need to repair and maintain will always continue. Reports from our customer base are that their customers are extremely cost conscious and are shopping around to get the best possible price. Unfortunately, this is often a symptom of businesses' weak order books and subsequently having time on their hands.

In Europe, where a lot of the UK's strength graded timber, joinery grade softwood, and engineered wood products are supplied from, log supplies reduced in both the Nordic countries and central Europe because the primary consumers of round wood are no longer willing to pay the extremely high prices forest owners have been demanding. This, together with weak demand across most main European markets, resulted in production curtailments being taken, many in the form of extended Christmas holidays.

We start 2026 with supply chain inventories in relative balance. Should either a lack of production, or excessive demand materialise in the first quarter, we can expect to see very aggressive moves to push prices up in the second quarter.

> Demand from construction sites for engineered timber products slowed at the back end of the fourth quarter and businesses also took proactive steps to reduce their inventories in the run up to their financial year ends, which resulted in poor delivered volumes.

Expert Panel
Heating and Hot Water Solutions

BAXI

Paul Haynes, Product, Solutions & Marketing Director of Baxi is BMBI's Expert for Heating and Hot Water Solutions

UK boiler volumes were flat in Q4 2025 year on year, while heat pump installations climbed sharply. First-half 2025 gas boiler sales were up 5%. Heat pumps, though a fraction of the market, were up 30%, driven by heightened public awareness, the £7,500 Boiler Upgrade Scheme and mounting regulatory pressure. The Future Homes Standard (FHS) and the Clean Heat Market Mechanism (CHMM) are reshaping the landscape, and the shift towards low-carbon heating is no longer theoretical. It's underway. The 2035 boiler ban was scrapped, but developers are already phasing out fossil fuel systems to meet carbon targets and future-proof their portfolios ahead of the Future Homes Standard implementation

About 125,000 Air Source Heat Pumps were installed in 2025 (up 25% from 96,000 in 2024), while annual boiler sales neared 1.35 million, but the gap is narrowing. The UK's inefficient housing stock has a median EPC rating of Band D. We must retrofit millions of homes and deliver hundreds of thousands of new ones, with low-carbon heating at their core to meet Net Zero by 2050. This is not swapping components, it's systemic transformation.

Success hinges on deep collaboration. Developers need partners to co-design integrated systems that deliver low-temperature performance, simplify installation, and reduce risk. R&D teams must align with build strategies, and products engineered for performance, speed, and sustainability. Transparent lifecycle data, low-carbon materials, and smart controls are essential.

The UK heating industry stands at an inflection point, but… • The running cost disparity (electric v gas) and high upfront prices dissuade many homeowners from heat pumps. Government grants help, but long-term solutions (energy price reform, higher carbon pricing, or mass production economies of scale) are needed to persuade buyers. • Scaling heat pumps from 100,000 to 400,000/year installs will require thousands more trained heat pump engineers. The industry has 130,000 Gas Safe engineers versus a few thousand MCS-certified heat pump installers. Enticing new talent into the sector and training are urgent. • Electrifying heating puts a load on the grid, which needs an upgrade and smart demand management as heat pump numbers grow. This is an opportunity for innovation in thermal storage and grid-interactive appliances.

However, the FHS and Net Zero drive are a once-in-a-generation chance to upgrade Britain's heating infrastructure. Let's take it!

The FHS and Net Zero drive are a once-in-a-generation chance to upgrade Britain's heating infrastructure.

Let's take it!

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**	**20**	**18**

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

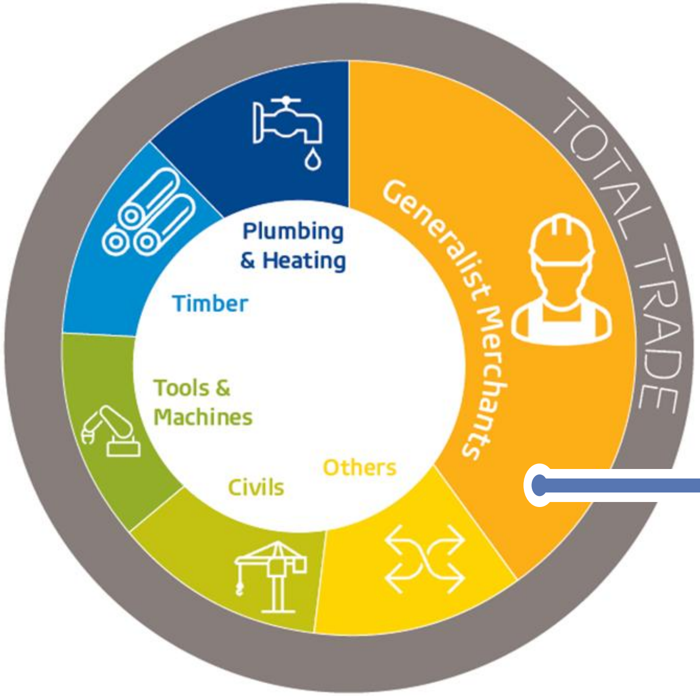
2023	
H1	H2
124	**124**
2024	
H1	H2
125	**126**
2025	
H1	H2
124	**126**

Full Year

2023
248
2024
251
2025
250

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

Travis Perkins

selco BUILDERS WAREHOUSE

JEWSON

BUILDBASE BUILDING & TIMBER SUPPLIES

gibbs & dandy

MKM BUILDING SUPPLIES

IBMG INDEPENDENT BUILDERS MERCHANT GROUP

SYDENHAMS Timber & Builders Merchants

EH Smith

COVERS Timber & Builders Merchants

Bradfords

HOWARTH TIMBER & BUILDING SUPPLIES

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

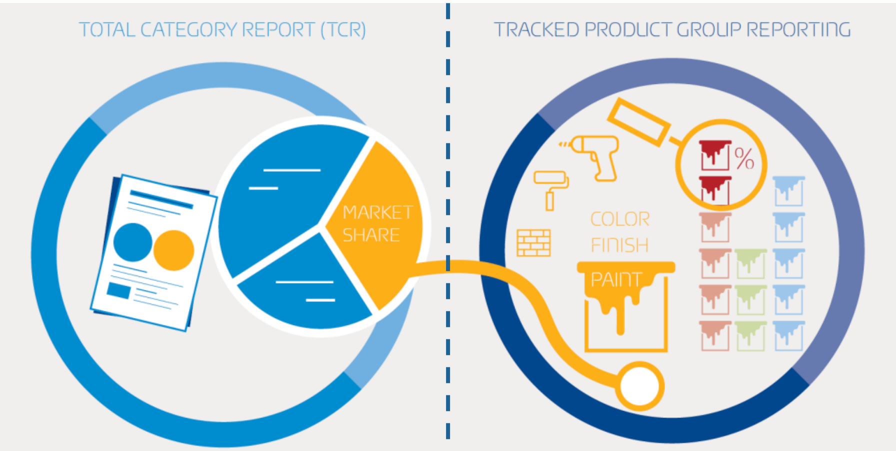
Plumbing Heating & Electrical
Plumbing Equipment
Boilers Tanks & Accessories
Heating Equipment/Water Heaters/Temperature Control/Air Treatment
Radiators And Accessories
Electrical Equipment
Lighting And Light Bulbs

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



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

NiQ GfK
Powerful, accurate, continuous insights

MRA
Experienced industry researchers

BMF
The voice of the industry

cma construction marketing AWARDS 2017 WINNER
Best Product Launch

CMA CONSTRUCTION MARKETING AWARDS WINNER 2020
Best use of research & insight

CMA 2021 Client League Top 10

Excellence in building
materials supply

BMF (Builders Merchant Federation)
Forecast Report

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

BMF
Excellence in building materials supply

Builders Merchants Winter Forecast 2025

The BMF. Building your people. Building your skills. Building your business. Building your voice.

Building Excellence.

Contact us

For further information

Emile van der Ryst

Key Account Manager - Trade & DIY

emile.vanderryst@nielseniq.com

+44 (0) 20 7890 9615

Andrei Imbru

Industry Analyst / Economist

Andrei.Imbru@bmf.org.uk

+44 (0) 24 7685 4994

Callum Budd

Research Director

callum@mra-research.co.uk

+44 (0) 1453 521621