Excellence in building materials supply

Builders Merchant Building Index

Quarter 1 2026

(Published 29 May 2026)

Highlights - Like-for-like value sales

(adjusted to remove the effect of trading days)

Builders Merchant Building Index

BMBI: Q1 2026

Like-for-like value sales

(adjusted to remove the effect of trading days)

Builders Merchant Building Index

www.bmbi.co.uk

Latest month March **2026** v Last year **March 2025**	Latest 3 months **Jan - Mar 2026** v Last year **Jan - Mar 2025**	Latest 3 months **Jan - Mar 2026** v Previous 3 months **Oct - Dec 2025**	Latest 12 months **Apr 2025 - Mar 2026** v Previous 12 months **Apr 2024 - Mar 2025**
-3.6%	-3.2%	-0.6%	0.0%

Total Builders Merchants **like-for-like value** sales were -3.2% lower in Quarter 1 2026 compared with Quarter 1 2025. **Like-for-like volume** sales were down -8.1% but **prices** increased by +5.4%.

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Highlights - Total (unadjusted) value sales

Builders Merchant Building Index

BMBI: Q1 2026

Total (unadjusted) value sales

Builders Merchant Building Index

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+1.0%

Latest month
March 2026
v
Last year
March 2025

Latest 3 months
Jan - Mar 2026
v
Last year
Jan - Mar 2025

-3.2%

+2.7%

Latest 3 months
Jan - Mar 2026
v
Previous 3 months
Oct - Dec 2025

Latest 12 months
Apr 2025 - Mar 2026
v
Previous 12 months
Apr 2024 - Mar 2025

-0.4%

"With no difference in trading days in Quarter 1 2026, unadjusted value sales were +3.2% higher than in Quarter 1 2025. Volume sales were down -8.1% but prices increased +5.4%."

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Introduction:

Builders Merchant Building Index

This **Builders Merchant Building Index (BMBI)** report contains data from NiQ GfK's ground-breaking Builders Merchants Panel, which analyses data from over 88% of generalist builders' merchants' sales throughout Great Britain. NiQ GfK's Builders Merchant Point of Sale Tracking Data sets a gold standard in reliable market trends. Unlike data from sources based on relatively small samples or estimates, or sales from suppliers to the supply chain, this up-to-date data is based on actual sales from merchants to builders and other trades. It's therefore a very good proxy for housing RMI.

The monthly series tracks what is happening in the market month by month and includes an in-depth review every quarter. BMBI Index data is calculated on the 12 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 1 and March 2026 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 25 to 36 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.**

More data available

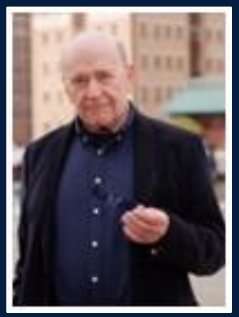
This BMBI report provides valuable top-level indices but there's considerably more data available. NiQ GfK insights go much deeper and include sales value data. NiQ GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that 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**.

Nine Black Swans in 18 Years - 1

Mike Rigby, Managing Director - MRA Research

mra research
Market insight & strategy



Since the financial crash 18 years ago, nine 'Black-Swan' events have disrupted, damaged and destabilised the UK economy, and construction. Some of these were external, others were own goals. The term, Black Swan, was coined to describe unpredictable, infrequent, low-probability, high-impact events. Perhaps we need a new term for these increasingly frequent, extremely disruptive shocks.

Economists may argue which events should be included or excluded, and which have done the most damage. But only the most robust economies and industries can shrug off nine severe shocks in 18 years and continue to grow strongly.

As an important but often overlooked driver of national growth, construction, with its numerous, complex supply chains has been particularly sensitive to frequent shocks. Supply chains are easy and quick to disrupt, harder and longer to reconnect to enable construction to bounce back.

Our Black Swan timeline is:

1. Austerity 2010 (Origin UK) following the 2007-9 financial crash (Origin USA)
2. Brexit - a protracted shock (the vote, the negotiations, leaving) that amplified continuing economic austerity (Origin UK)
3. The 2020 COVID-19 pandemic (Origin China) and 2021-2022 aftermath
4. Accidental blocking of the Suez Canal in 2021 by a container ship (Origin Climate Change)
5. War in Ukraine starting 2022 (Origin Russia)
6. A mini budget in 2022 that spooked the bond markets (Origin UK)
7. Houthi rebels attack ships in the Red Sea 2023-2024 (Origin Israel and Iran)
8. Trump's 2025 'Liberation Day' tariffs trade war (Origin US)
9. The 2026 Middle East War (Origin Israel and US, and Iran's retaliation)

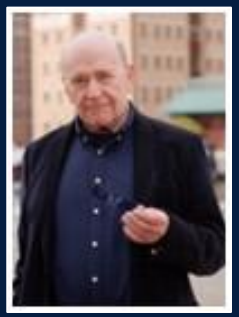
As an important but often overlooked driver of national growth, construction, with its numerous, complex supply chains has been particularly sensitive to shocks.

Supply chains are easy and quick to disrupt, harder and longer to reconnect to enable construction to bounce back.

Nine Black Swans in 18 Years- 2

Mike Rigby, Managing Director - MRA Research

mra research
Market insight & strategy



We can expect more Black Swans to knock us off course, but perhaps we are now too tuned to bad news to see any good. Certainly, Paul Hetherington thinks so*. Paul is Non-Executive Chairman at IBC and IPG buying groups, Non-Executive Director at BRE Group and of this industry.

A few weeks ago, Paul says, the International Monetary Fund published its World Economic Outlook. The headlines were gloomy. UK growth downgraded, harder hit than other major economies. Doom, gloom, the usual.

But buried in the data, it says the UK is again the world's 5th largest economy. Ahead of India, a trillion dollars ahead of France, and the IMF projects we'll overtake Japan by 2029. And if current trends continue, the UK could pass Germany to become Europe's largest economy by around 2040. Despite Brexit. Despite the doom-mongers.

Why? Global exports of goods have fallen as a share of world output since 2008 (from 24% to 21%) while global exports of services have climbed from 6% to 8% of world GDP, and that trend is accelerating. Which plays directly to Britain's strengths, Paul says: 59% of UK exports are now services not goods. That's the highest proportion of any major economy, second only to the US in absolute terms.

'Can we source or make it cheaper?' is a race to the bottom, but the services economy is a fundamentally different game. The competitive conversation is about trust. Can we be more trusted? More expert? More reliable? More sophisticated? That's a race to the top. And it's one that British businesses are extraordinarily well-positioned to win. The wind is at our backs, says Paul. The shift from goods to services trade is the biggest structural tailwind the UK has had in decades. And It's happening despite – not because of – anything our politicians have done.

*Thanks to Paul Hetherington 'Despite Brexit' 21 April 2026 from The Owl's View:
https://www.linkedin.com/pulse/despite-brexit-paul-hetherington-mba-fiod--ryfoe/

Global exports of goods have fallen as a share of world output since 2008 (from 24% to 21%) while global exports of services have climbed from 6% to 8% of world GDP, and that trend is accelerating.

Which plays directly to Britain's strengths

Overview and Insights

Emile van der Ryst,

Key Account Manager – Trade & DIY – NiQ GfK

As expected 2026 has begun in a similarly challenging fashion to the end of 2025 for the Builders Merchants sector. Early optimism has faded as the wider UK construction market continues to face significant headwinds. Growth forecasts have been revised down, construction output has weakened, particularly in private housing, and merchants have reported falling sales during the opening months of the year. Most of this was already in motion prior to the Iran war and the knock-on effect it has had on oil prices, associated energy costs and anticipated inflationary increases.

Against this backdrop, Builders Merchants recorded a -3.2% decline in value in Q1 2026 compared to Q1 2025. Looking beneath the headline, volumes fell noticeably by -8.1%, with average pricing up by +5.4%. This is a continuation of a trend starting in November where volumes declined and average pricing increased. January and February were especially affected by wet weather, resulting in double digit volume declines.

The Heavy Building Materials category was a key driver behind this, going down -6.7% in value. Volumes were down by -11.8%, with average price up by +5.7%. These volume declines were seen across almost all subcategories, but it was those in aggregates, blocks, bricks and roofing products that stood out. Landscaping was the other key area to see a noticeable negative shift, as value from 2025 Q1 to 2026 Q1 dropped by -7.0%. Fencing and gates had the largest negative value impact across all major subcategories tracked in the reporting and was the main driver behind the Landscaping performance.

Timber & Joinery remained an area of strength for the sector, seeing growth of +0.9% in Q1. Timber and sheet materials both saw value growth, but it's worth mentioning that the former was driven by average price increases, while the latter was driven by volume growth. Cladding performance stood out, with this being one of the best performing subcategories across all areas.

In the smaller categories, double digit growth took place in Renewables and Water Management, with noticeable growth also seen in Workwear and Safetywear. Kitchens and Bathrooms increased by +1.8% in value, while Plumbing, Heating and Electrical was up by +0.1%. The former benefitted from growth in both bathrooms and fitted kitchens, with the latter helped by boilers, tanks and accessories.

Looking ahead into the year, uncertainty remains elevated, feeding into growing concerns around housebuilding targets and the need for governmental intervention. Private housing and RMI are expected to stay under pressure with costs continuing to weigh on confidence, especially as the knock-on effect of the Iran war is yet to be fully understood.

Looking ahead into the year, uncertainty remains elevated, feeding into growing concerns around housebuilding targets and the need for governmental intervention.

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

This has been another disappointing quarter for building materials sales, as the UK construction industry continues to face persistent challenges. Early signs of improvement in construction output in February were quickly reversed after the start of the Middle East conflict in March. The expectation now is that the conflict will further intensify pressures, particularly through rising prices and renewed inflation.

The latest Office for National Statistics (ONS) figures estimate that total construction output grew by 0.4% in Q 1 2026 compared with Q 4 2025. However, total construction new orders fell by 10. 5% in Q 1 2026 over Q 4 2025. At a sector level, only four of the nine sectors grew in Q 1, with the main positive contributor being private housing repair and maintenance, which increased by 4.1%, albeit from a low base.

Activity in this vital RMI area was already subdued in 2025, as uncertainty ahead of the Autumn Budget led homeowners to focus on saving rather than on discretionary spending. Political and economic uncertainty, both nationally and globally, coupled with the adverse effect of inflation on household bills, means this "wait and see" approach is expected to continue for the next 12 months.

Private housing, another critical sector, is also performing below expectations. Although annual home completions rose for the second consecutive quarter at the start of the year, with Energy Performance Certificate (EPC) data showing that 204.500 homes were completed in the 12 months to March 2026, this is a very marginal improvement (1%) on Q 4 2025.

On top of this, housing starts have continued to fall, indicating that future housing delivery will be little better. According to figures from the National House Building Council (NHBC), starts fell by 4% between January and March 2026 alone, and are down 3% on an annual basis.

Housing supply remains considerably below what's needed to meet either the Government's calculation of housing need in England (c. 367,000) or its policy target of delivering 1.5 million new homes over the life of the current Parliament.

None of the above makes positive reading for the building materials sector. At this stage, it is difficult to envisage a significant upturn in the coming year without government action to speed up planning and provide incentives to unlock the housing market.

.... housing starts have continued to fall, indicating that future housing delivery will be little better.

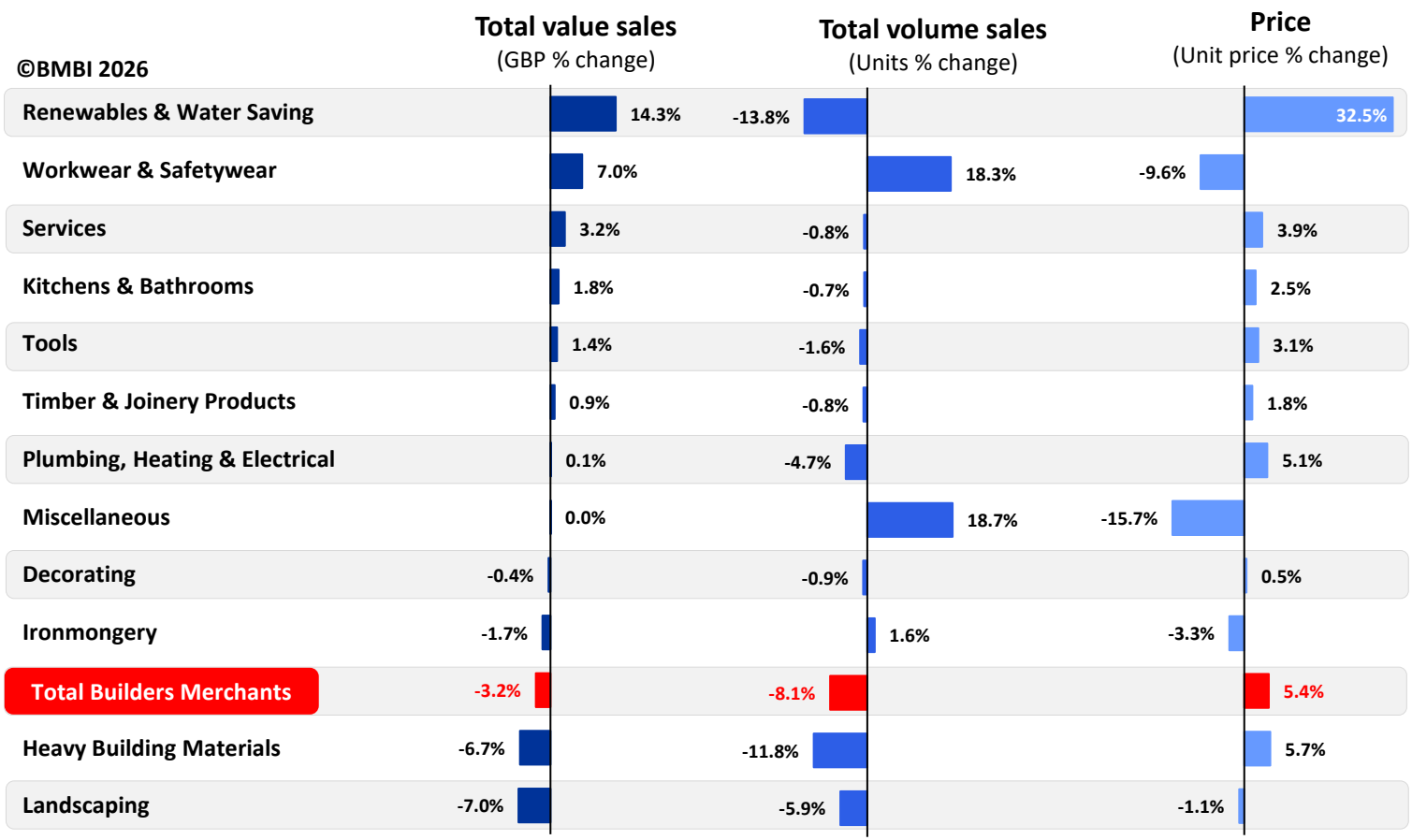
According to figures from the National House Building Council (NHBC), starts fell by 4% between January and March 2026 alone, and are down 3% on an annual basis.

Latest quarter v last year

Total value sales, total volume sales & price % change

Builders Merchant Building Index

Quarter 1 2026 v Quarter 1 2025



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **unadjusted value** sales were -3.2% lower in Quarter 1 2026 than in Quarter 1 2025.

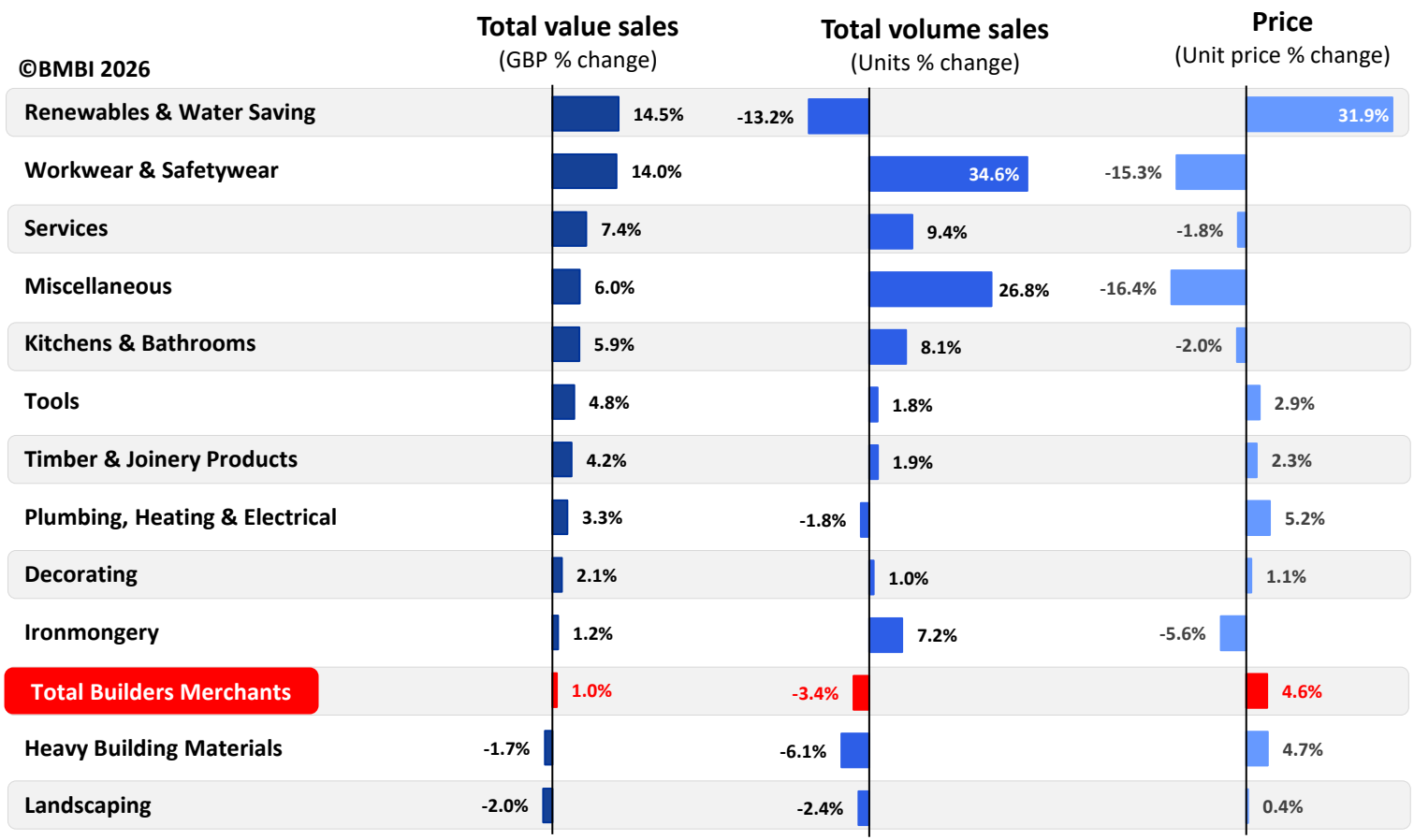
Unadjusted volume sales were down -8.1% but prices were up +5.4%.

Latest month v last year

Total value sales, total volume sales & price % change

Builders Merchant Building Index

March 2026 v March 2025



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

With one more trading day, **unadjusted value** sales were +1.0% higher March 2026 than in March 2025.

Unadjusted volume sales were -3.4% lower in March 2026 than in March 2025 but **prices** were up +4.6%.

Latest 12 months v previous 12 months

Total value sales, total volume sales & price % change

Builders Merchant Building Index

April 2025 – March 2026 v April 2024 – March 2025

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	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (Unit price % change)
Renewables & Water Saving	8.5%	-4.1%	13.1%
Miscellaneous	3.3%	10.5%	-6.5%
Services	2.6%	0.3%	2.3%
Workwear & Safetywear	2.5%	8.1%	-5.2%
Timber & Joinery Products	2.1%	2.0%	0.2%
Plumbing, Heating & Electrical	1.8%	-0.5%	2.3%
Kitchens & Bathrooms	1.4%	0.7%	0.7%
Landscaping	0.3%	1.2%	-0.9%
Tools	0.2%	-1.7%	2.0%
Ironmongery	-0.2%	2.9%	-2.9%
Total Builders Merchants	-0.4%	-1.4%	1.0%
Decorating	-2.0%	-2.9%	1.0%
Heavy Building Materials	-2.4%	-3.1%	0.6%

NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

With one fewer trading day in the latest period, **unadjusted value** sales were -0.4% lower than in the previous 12 months.

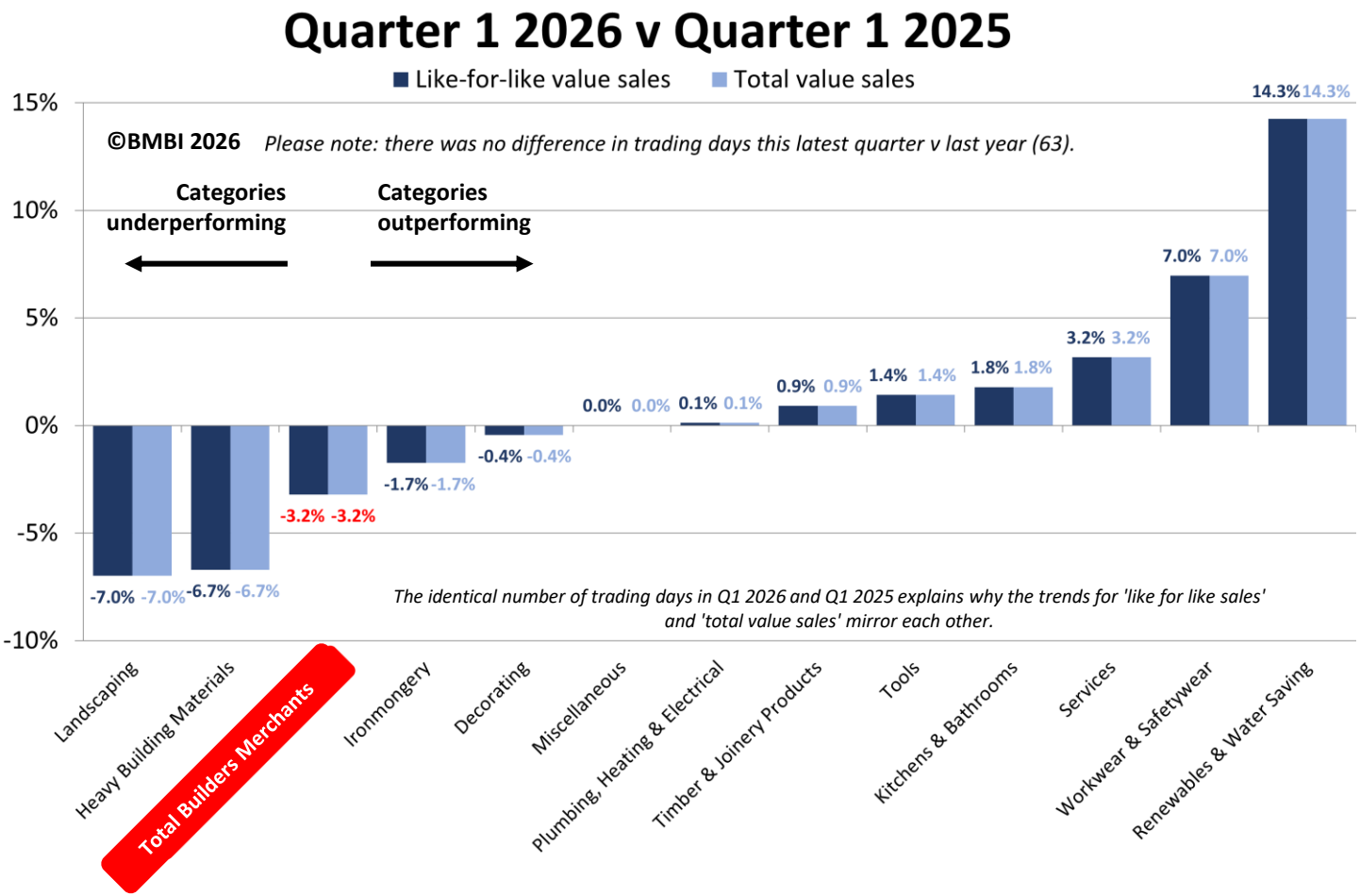
Unadjusted volume sales were -1.4% lower than in the previous 12 months. **Prices** were up +1.0%.

Latest quarter v last year

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

There was no difference in trading days (63).
Like-for-like sales take trading day differences into account.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **like-for-like value** sales were -3.2% lower in Quarter 1 2026 than in Quarter 1 2025.

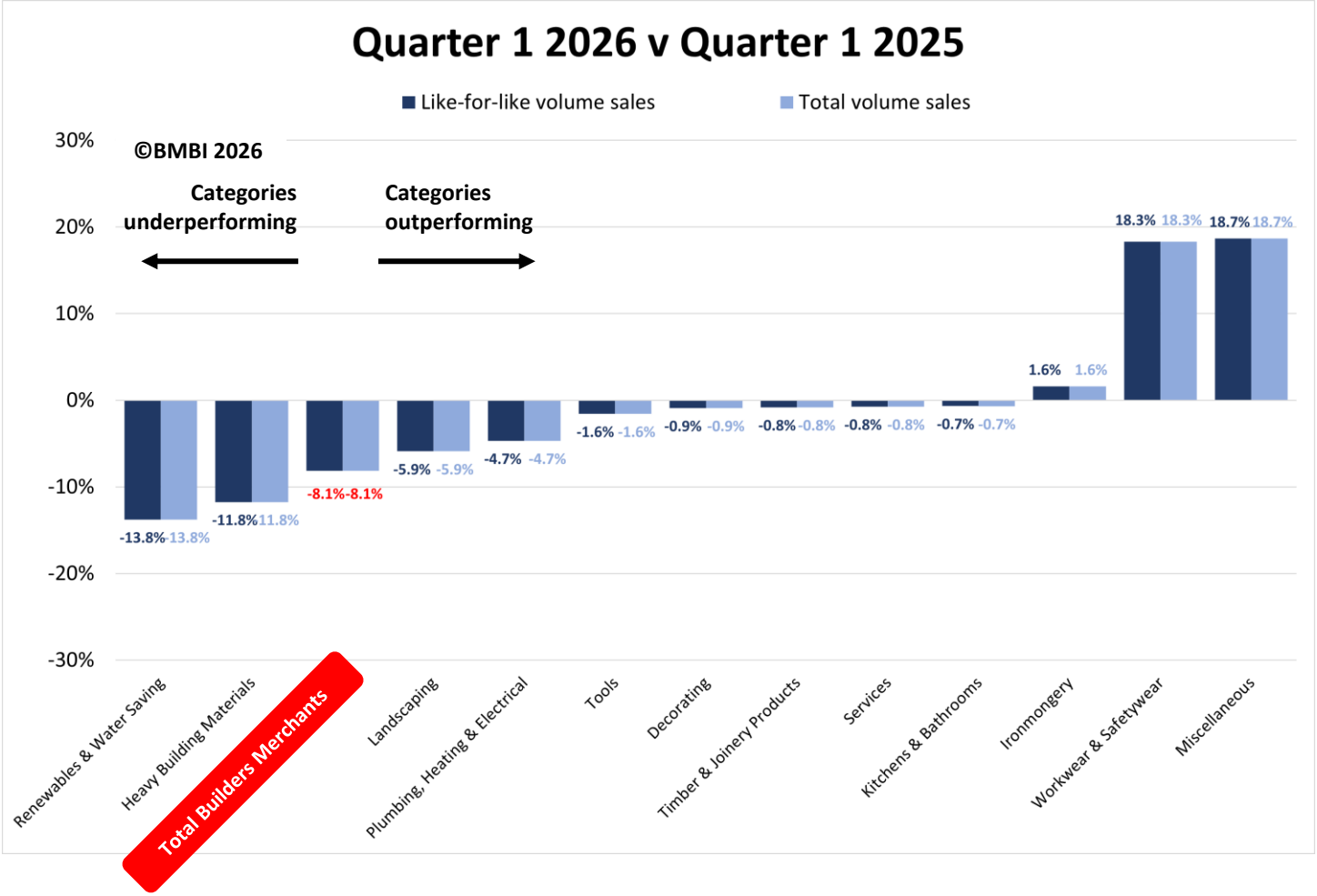
Identical numbers of trading days in Q1 2026 and 2025 explains why like-for-like sales and Total value sales mirror each other.

Latest quarter v last year

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

There was no difference in trading days (63).
Like-for-like sales take trading day differences into account.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **volume** sales were -8.1% lower in Quarter 1 2026 than in Quarter 1 2025.

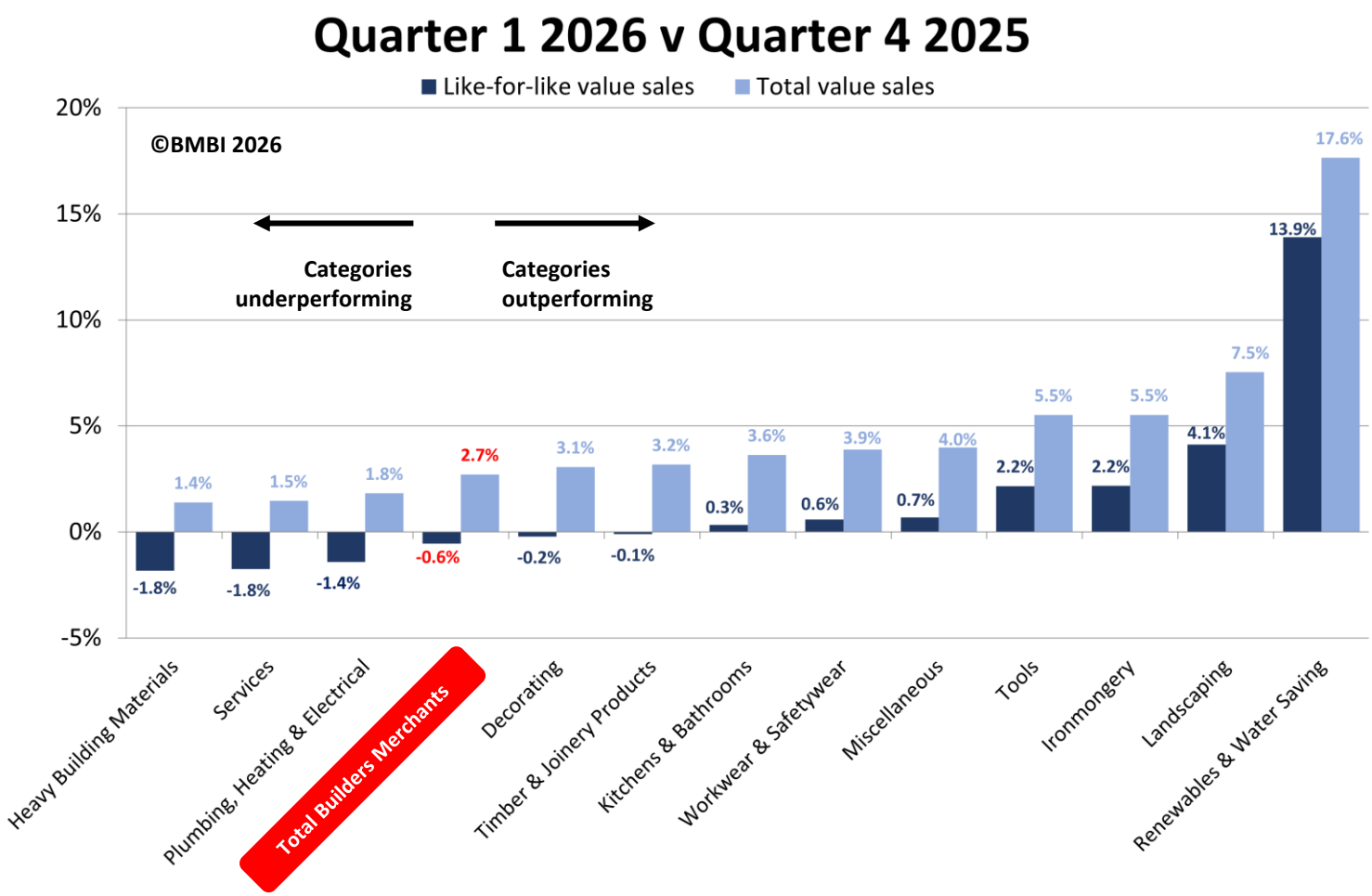
Identical numbers of trading days in Q1 2026 and 2025 explains why **volume** sales and Total value sales mirror each other.

Latest quarter v previous quarter

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

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

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Renewables & Water Saving was the top performing category.

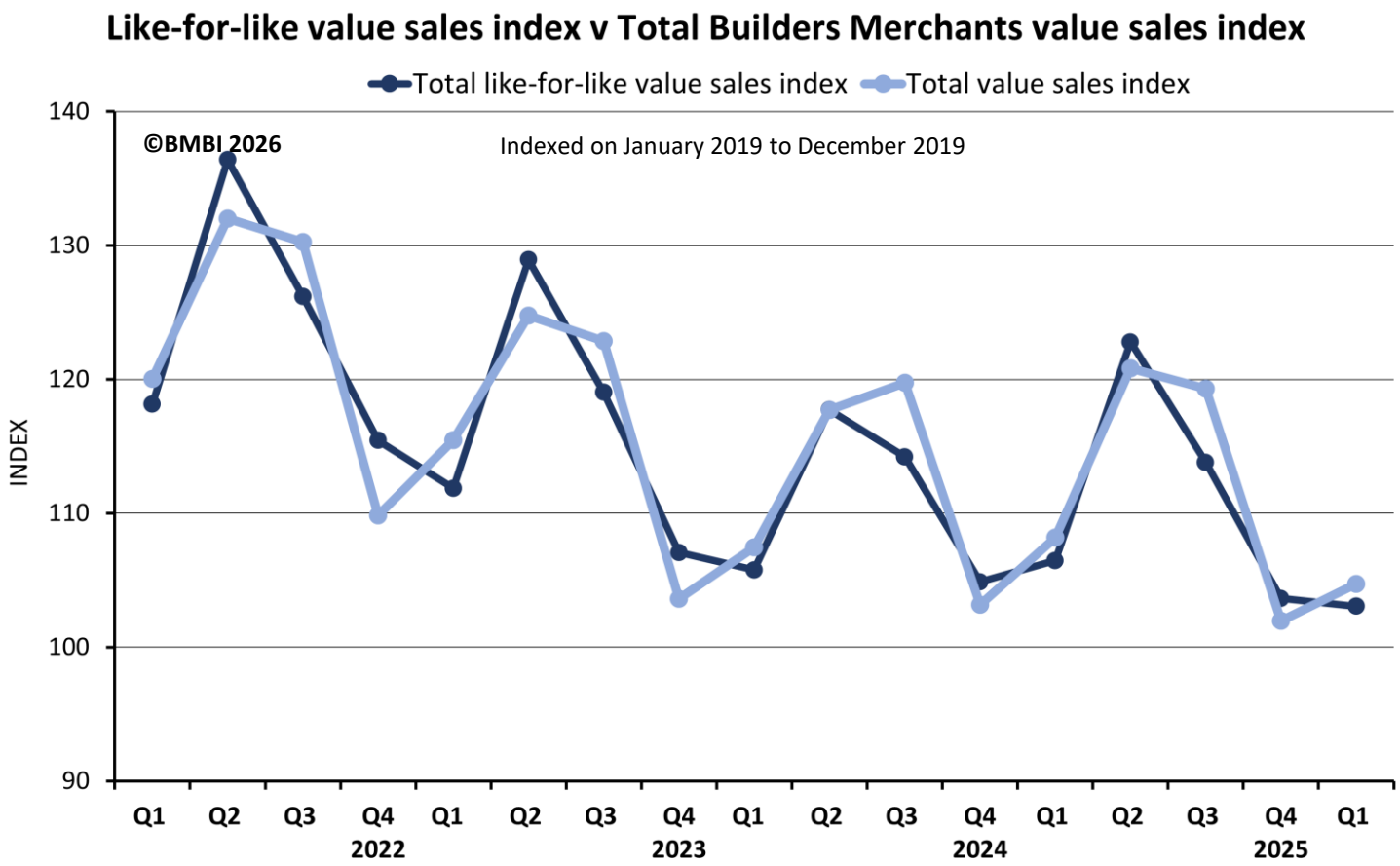
Heavy Building Materials, Services, and Plumbing, Heating & Electrical were the weakest.

Quarterly: Index

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

63 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.

Builders Merchant Building Index



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

The Quarter 1 BMBI **like-for-like value** sales Index was 103.1.

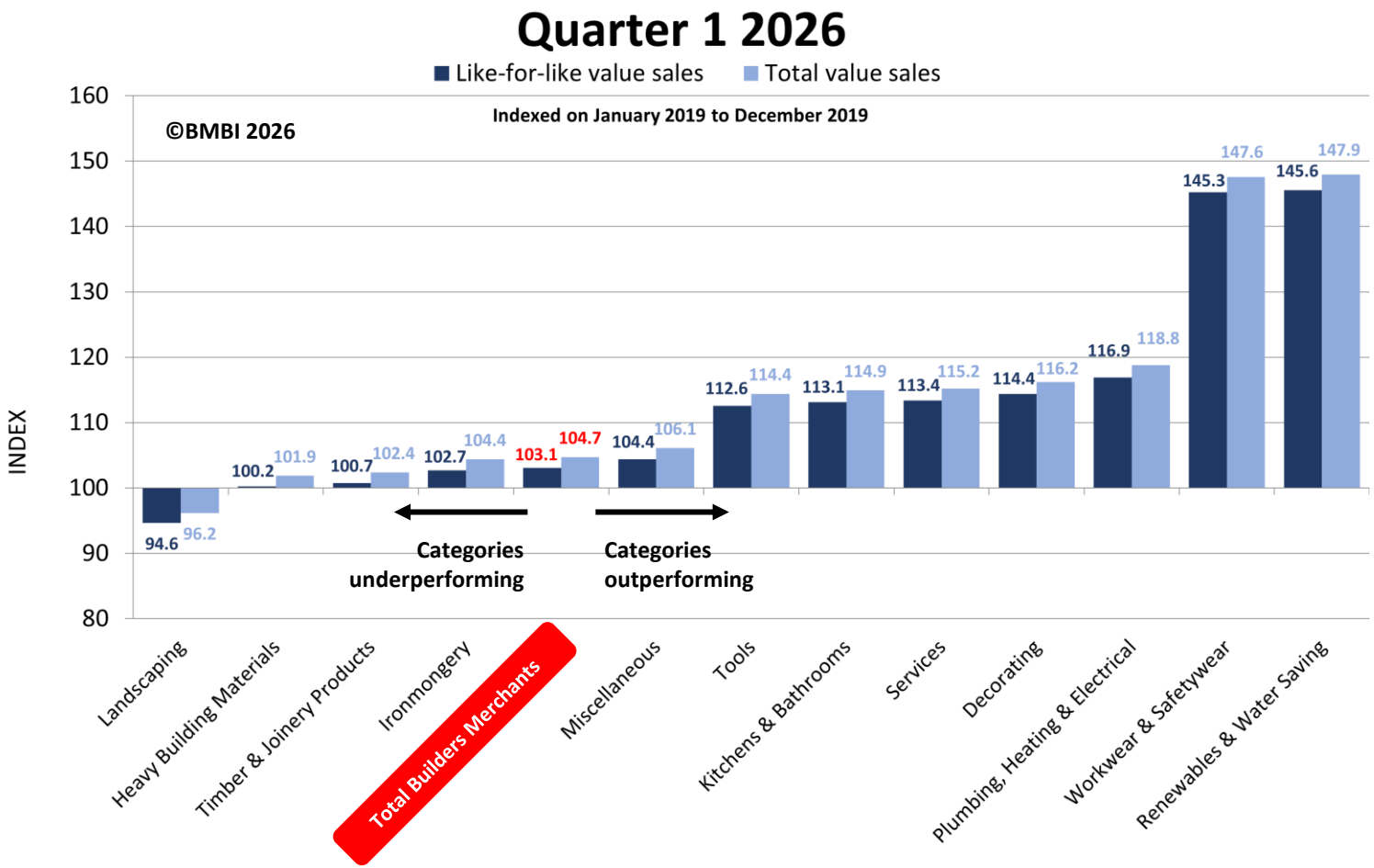
With one more trading day this quarter versus the Index base period, the **unadjusted value** sales Index was 104.7.

Latest quarter: Index by category

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

63 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.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

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

Landscaping indexed the lowest.

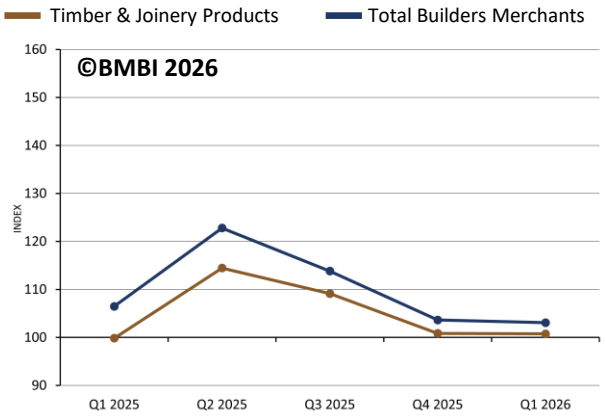
Quarterly: Index by category - 1

Like-for-like value sales category index

Source: GfK's Builders Merchants Total Category Report
January 2019 to March 2026

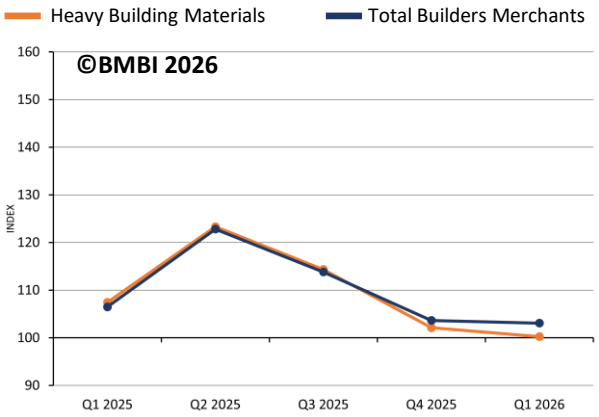
Builders Merchant Building Index

Timber & Joinery Products



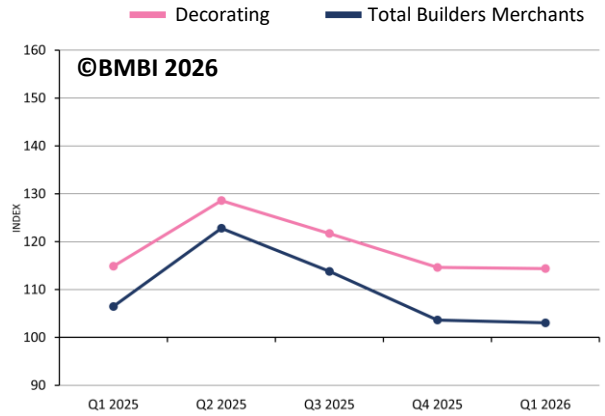
Timber & Joinery Products (100.7), the second largest category, indexed below Total Merchants in recent quarters.

Heavy Building Materials



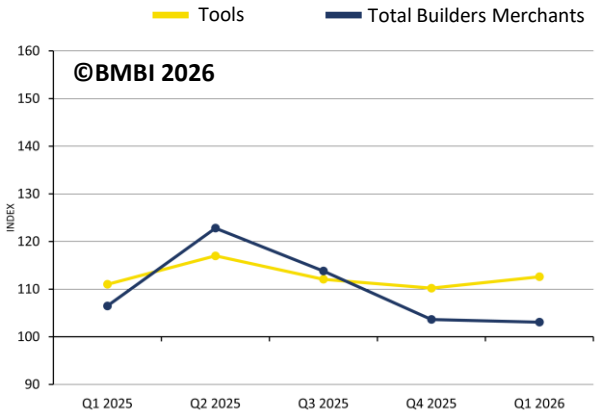
The largest category, Heavy Building Materials (100.2) performed below Total Merchants in Q1 2026.

Decorating



Decorating (114.4) has consistently over-performed against Total Merchants.

Tools



Tools (112.6) continued to outperformed Total Merchants in the latest quarter.

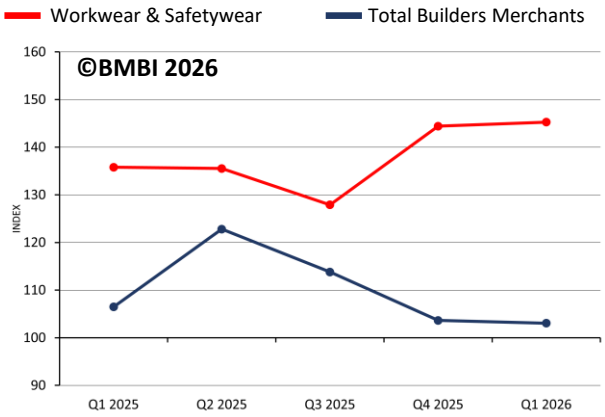
Quarterly: Index by category - 2

Like-for-like value sales category index

Source: GfK's Builders Merchants Total Category Report
January 2019 to March 2026

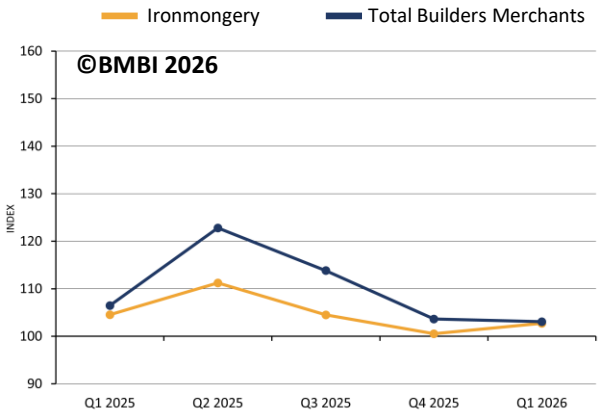
Builders Merchant Building Index

Workwear & Safetywear



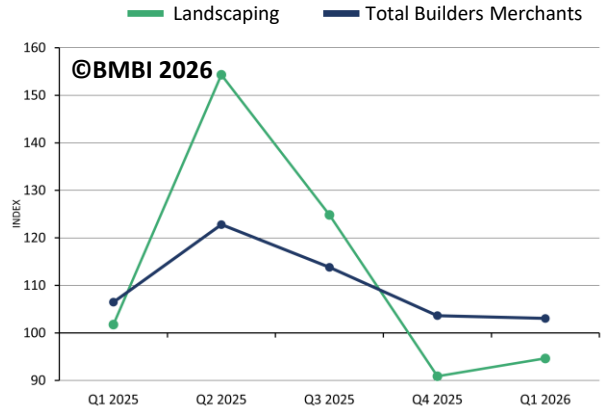
Workwear & Safetywear (145.3) has been a top-performing category in recent quarters.

Ironmongery



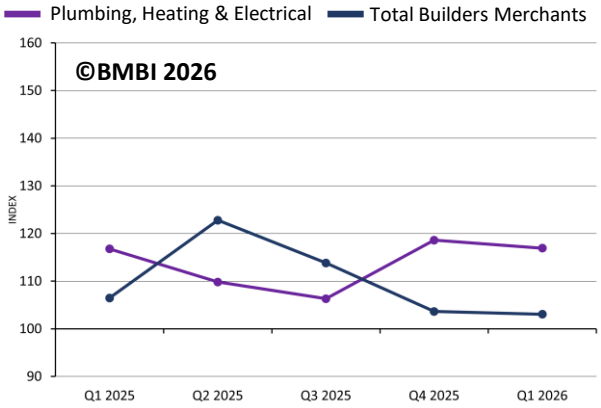
Ironmongery (102.7) has under-performed Total Merchants in recent quarters but is closing that gap.

Landscaping



Landscaping (94.6), the third largest category, is highly seasonal as can be seen over the last five quarters.

Plumbing, Heating & Electrical



Less seasonal than landscaping, P&H (116.9) tends to outperform Total Merchants in Autumn & Winter and underperform in the Summer.

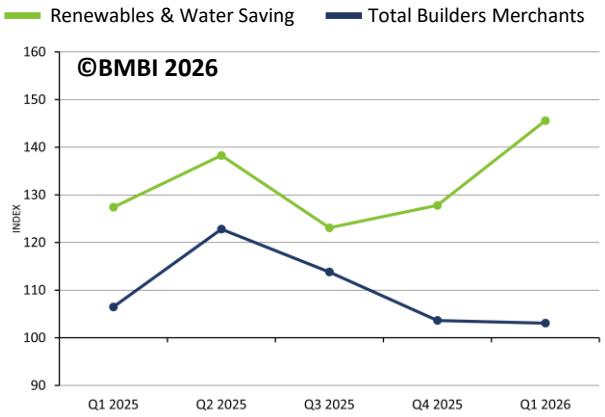
Quarterly: Index by category - 3

Like-for-like value sales category index

Source: GfK's Builders Merchants Total Category Report
January 2019 to March 2026

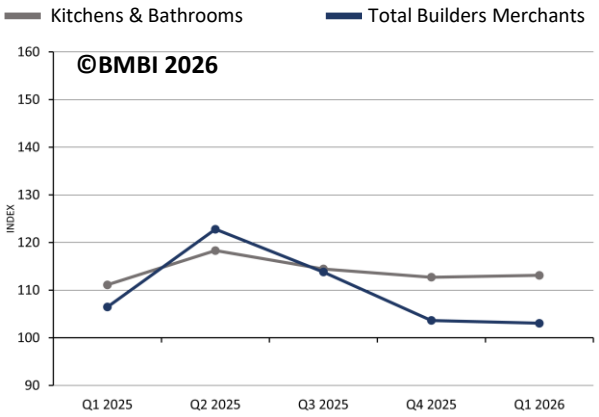
Builders Merchant Building Index

Renewables & Water Saving



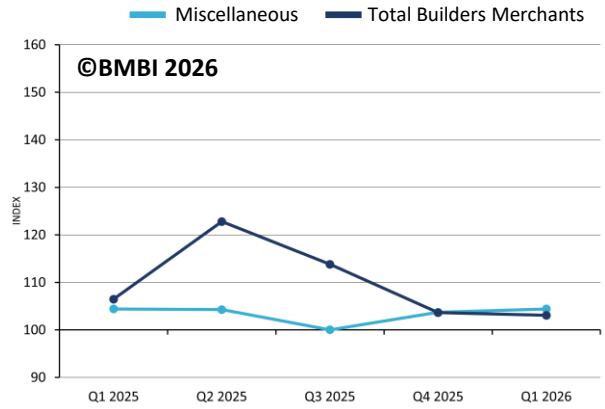
Renewables & Water Saving (145.6) is a small category that has recently performed far better than Total Merchants over the last two quarters.

Kitchens & Bathrooms



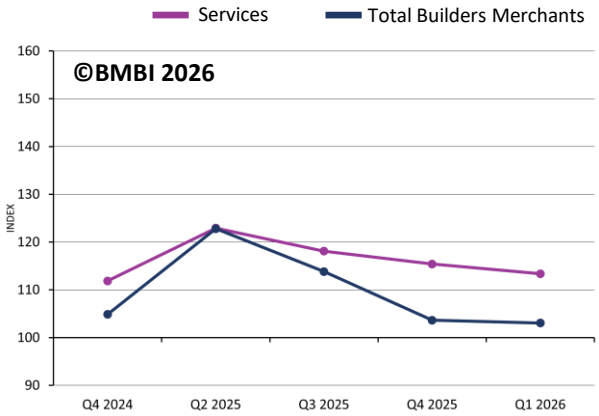
Kitchens & Bathrooms (113.1) outperformed Total Merchants in the most recent two quarters.

Miscellaneous



Miscellaneous (104.4) includes a mixed range of products (see page 69).

Services



Services (predominantly tool/hire services) indexed at 113.4 in Q1 2026, above Total Merchants.

Quarterly: Index and Categories

Like-for-like value sales Index:
Quarter 1 2024* to Quarter 1 2026

Indexed on January 2019 – December 2019

Builders Merchant Building Index

QUARTERLY SALES VALUE INDEX	Index	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total Builders Merchants	100	105.8	117.7	114.2	104.9	106.5	122.8	113.8	103.6	103.1
Timber & Joinery Products	100	101.2	108.5	107.0	99.1	99.8	114.4	109.1	100.8	100.7
Heavy Building Materials	100	105.8	118.6	116.6	106.3	107.4	123.3	114.4	102.1	100.2
Decorating	100	118.6	129.4	126.2	116.4	114.9	128.6	121.7	114.6	114.4
Tools	100	108.3	116.0	110.7	111.4	111.0	117.0	112.1	110.2	112.6
Workwear & Safetywear	100	140.9	129.0	131.1	141.6	135.8	135.5	127.9	144.4	145.3
Ironmongery	100	103.3	106.8	105.6	100.9	104.5	111.2	104.5	100.5	102.7
Landscaping	100	98.9	143.3	124.0	91.8	101.7	154.3	124.8	90.9	94.6
Plumbing Heating & Electrical	100	116.8	106.0	104.5	114.6	116.8	109.8	106.3	118.6	116.9
Renewables & Water Saving	100	122.9	121.2	117.3	125.0	127.4	138.3	123.1	127.8	145.6
Kitchens & Bathrooms	100	113.7	116.2	111.5	111.4	111.1	118.3	114.4	112.7	113.1
Miscellaneous	100	100.7	98.9	96.9	97.4	104.4	104.3	100.1	103.7	104.4
Services	100	104.6	117.7	116.3	111.9	109.9	122.9	118.1	115.4	113.4

*Click the web link below to see the complete series of quarterly indices from Q1 2024.

NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Quarterly: Index and Categories

Total value sales Index:
Quarter 1 2024* to Quarter 1 2026

Indexed on January 2019 – December 2019

Builders Merchant Building Index

QUARTERLY SALES VALUE INDEX	Index	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026
Total Builders Merchants	100	107.4	117.6	119.6	103.0	108.3	120.9	119.4	102.0	104.7
Timber & Joinery Products	100	103.0	108.7	112.1	97.4	101.5	112.6	114.5	99.2	102.4
Heavy Building Materials	100	107.3	118.3	122.1	104.3	109.4	121.5	120.1	100.5	101.9
Decorating	100	120.2	129.1	132.0	114.2	116.6	126.5	127.7	112.8	116.2
Tools	100	110.0	116.0	116.4	109.9	113.2	115.6	118.1	108.4	114.4
Workwear & Safetywear	100	142.7	128.6	137.0	139.1	138.0	133.4	134.2	142.1	147.6
Ironmongery	100	104.9	106.7	110.6	99.1	106.2	109.5	109.6	98.9	104.4
Landscaping	100	100.7	143.5	130.1	90.3	103.5	152.0	130.9	89.4	96.2
Plumbing Heating & Electrical	100	119.2	106.5	109.8	112.9	119.4	108.8	112.3	116.7	118.8
Renewables & Water Saving	100	124.8	119.7	120.4	122.1	129.0	135.2	127.6	125.7	147.9
Kitchens & Bathrooms	100	116.0	116.8	116.7	109.2	112.9	116.6	120.1	110.9	114.9
Miscellaneous	100	102.3	98.9	101.5	95.9	106.1	102.7	105.1	102.0	106.1
Services	100	105.4	117.0	121.2	109.3	110.9	120.2	122.9	113.5	115.2

*Click the web link below to see the complete series of quarterly indices from Q1 2024.

NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

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.

Quarter 1 2026 was phenomenal for paving sales, as merchants stocked up ahead of potential product shortages and price rises.

Sandstone shortages was something I touched on in my previous comment; an extended monsoon season in India flooded quarries in the north and production had ground to a halt. On a visit in March, we saw that production had resumed but the months lost have caused major shortages, pushing up sandstone prices.

Unfortunately, Indian porcelain supplies have also been impacted this year. Not by rain, but by the fuel shortages caused by the blockades in the Strait of Hormuz. Production ceased completely for a short time. Now the factories are open again the production price for porcelain has gone up. We have good supplies of European mid-range porcelain, and the price points between this and what used to be an entry level offer from India is now narrowing.

Difficulties in getting stock from India have been compounded by the challenges we are facing due to the Iran war. Shipping costs have doubled, and while we are a long way short of the peaks we saw during Covid, container prices remain volatile and will be throughout the year.

The uplift in Q1 sales reflects merchants and suppliers working together to secure stock levels, rather than an accurate reflection of consumer demand which is very difficult to read. Some landscapers tell us they have full order books for 2026; others are in a desperate situation. Merchants too are finding the market to be boom or bust.

The next few months will be telling. We could see more people staying at home this summer, with holidays abroad subject to fuel surcharges and cancellations. With money in the bank, homeowners might be more inclined to spend on their gardens. This of course hinges on the weather! If it's a washout, holidays abroad will be back in, and home improvements out.

What the rest of 2026 looks like depends on so many variables - none of which are in suppliers' control. All we can do is our best to ensure the paving products customers want are on the ground, in stock when they need them.

We could see more people staying at home this summer, with holidays abroad subject to fuel surcharges and cancellations.

With money in the bank, homeowners might be more inclined to spend on their gardens.

Expert Panel

Steel Lintels

(Part of Heavy Building Materials)

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

January and February were a wash out with prolonged heavy rain slowing site work in an already depressed market. However, in March the rain eased, sunshine appeared and volumes started to flow…. well sort of. Overall Q1 was more than 10% behind Q1 2025. While March's run rate was maintained through April, at the point of writing, the 2026 re-forecast will be excellent if we achieve 2024 volumes.

The first quarter has been busy for the government, with the US-Iran war and the inflationary cost uplifts to businesses. While interest rates were held at 3.7% the Bank of England warned the UK needs to brace for rate hikes later this year. Higher inflation is unavoidable. Despite this pause in interest rate hikes, mortgage rates forecasts are dependent on geopolitics today.

On the 19th March 2026 the Government announced the long-awaited UK Steel Strategy, which aims to make the UK more self-sufficient. Therefore, from 1st July 2026 import quotas have been reduced by between 60 - 90%, with any excess facing a 50% tariff. The immediate impact is that steel prices are rising. Further increases are expected with the implementation of the UK Carbon Border Adjustment Mechanism from 1st Jan 2027. CBAM is aimed at supporting low carbon manufacturing and further protecting the UK Steel industry. Our energy costs, even with government support still outstrip our European counterparts, meaning these costs will be passed into the market until such time as the Government delivers on its 'clean energy superpower mission'. The UK Steel Strategy is a game changer.

At last, the 2025 Future Homes Standard has been announced, and thankfully Keystone's Hi-therm lintel, 15 years ahead of its time, has you covered. Fabric First, remains the most critical area before renewables are added. Overall construction costs are expected to rise by up to £5,000 depending on house type. In theory this will be offset by lower energy bills. House builders, and merchants to a degree, will have to learn how to sell to consumers, and SME's must learn how to maximise the return on investment from energy saving products such as steel lintels in the modern house to minimise energy bills.

Never a dull day.

Our energy costs, even with government support still outstrip our European counterparts, meaning these costs will be passed into the market until such time as the Government delivers on its 'clean energy superpower mission'. The UK Steel Strategy is a game changer

Expert Panel

Drylining Systems

(Part of Heavy Building Materials)

British Gypsum SAINT-GOBAIN

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

The first quarter's market performance has been varied, with sector performance, particularly High-Rise Residential, contracting. So, all sectors continue to have growth challenges, and recent forecasts confirm that. The Middle East conflict, and other factors, have added to the uncertainty and inflationary pressures have also affected confidence

Despite economic pressures and global uncertainty, sustainability hasn't moved down the agenda. New legislation, tighter performance requirements, and increased scrutiny mean the industry is being asked to do more, with less time, less margin, and less room for error. Sustainability in construction is at a turning point. It's no longer enough to set targets and get head office commitments. What matters is how targets are delivered on site. The challenge isn't ambition, it's application.

British Gypsum's focus, working alongside Isover under Saint-Gobain Interior Solutions, is closing the gap between what the industry is being asked to achieve and what it can realistically deliver on a project. Too often, sustainability is presented as complex, fragmented, or disconnected from real-world constraints. But it only has value for specifiers and contractors if it's buildable, compliant, and straightforward to deliver.

So, it's key to embed sustainability into product and system design from the outset. Whether via innovations such as 100% recycled gypsum plasterboard, or system-led approaches that combine plasterboard, metal framing, and insulation, the aim is simple: reduce complexity and improve performance. Customers aren't just trying to meet carbon targets, they're balancing space constraints, cost pressures, programme timelines, and evolving regulations. Achieving U-values, managing embodied carbon, and reducing waste happen within those constraints.

Manufacturers must do more than supply products: make sustainable specification easier, with clear guidance, integrated systems, and accessible, credible data. And circularity must move from concept to standard practice. Recycling schemes and material take-back initiatives reduce reliance on virgin resources, but their value lies in how easily they can be adopted on site. The industry doesn't need more sustainability messaging; it needs workable solutions. The future of drylining will be defined by those who simplify complexity: with systems that meet performance requirements, support compliance, and make sustainable choices easier to implement. British Gypsum's priority is clear: help customers move from ambition to delivery and make sustainability something that works not just in theory, but in practice.

Despite economic pressures and global uncertainty, sustainability hasn't moved down the agenda.

New legislation, tighter performance requirements, and increased scrutiny mean the industry is being asked to do more, with less time, less margin, and less room for error.

Expert Panel

Mineral Wool Insulation

(Part of Heavy Building Materials)

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

History doesn't repeat, but it rhymes. So we're reminded as global events again unsettle UK construction.

Our industry is no stranger to disruption. Covid, the Ukraine war and the Evergrande blockage have all stretched supply chains in recent years. The situation in Iran has once again triggered an unwelcome oil price shock.

We're fortunate the resulting energy price spike has arrived in the spring, when many households are switching off the thermostat. But with long-term effects predicted, it's an acute reminder of the critical importance of insulation. Not just for net zero, but for managing the cost of living and ensuring energy security. Better insulation is a national priority.

It's already on the agenda. The measures announced in the long-awaited Future Homes Standard will result in homes that have more insulation in the walls and the loft. And the Warm Homes Plan should drive some retrofitting demand, though not at the scale of fabric upgrades needed.

A nation seeking energy self-sufficiency will lean on mineral wool insulation. As merchants seek to meet that need, they should consider the other lesson from the current situation.

Shorter supply chains are more robust when trade flows are disrupted. There is value in sourcing products from close to home. We're fortunate in the UK to have several mineral wool manufacturers making products here (with more capacity to come), and that those products are generally made using locally-sourced raw materials such as stone and glass cullet - as long as Brits continue to enjoy a bottle of beer on a warm spring day, that raw material remains in plentiful supply.

These are uncertain times, for construction and the country. Mineral wool insulation will be part of the solution, helping to address some of our most pressing national challenges. Products made not just in the UK, but for the UK, so we're better-prepared the next time history rhymes.

Shorter supply chains are more robust when trade flows are disrupted.

There is value in sourcing products from close to home.

Expert Panel

Cement & Aggregates

(Part of Heavy Building Materials)

Heidelberg Materials

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

Quarter one was tough for bagged cement and aggregate sales as weak construction and housebuilding activity, above average rainfall and the war in Iran affected supply and demand.

The Mineral Products Association's (MPA) latest report confirms the decline in volumes. Mortar sales were -2% lower than Q4 2025, while primary aggregate sales (-0.8%) and ready-mixed concrete sales (-0.5%) also fell quarter-on-quarter. Q1 asphalt sales were flat (-0.1%), despite increased local authority spending on road maintenance ahead of the end of the financial year.

Behind the stats many contributory factors are out of the industry's control. Winter 2025/26 was one of the wettest since records began and the persistent rainfall created poor ground conditions for construction.

The war in Iran is having a huge impact on the market and customers. We are trying to keep price increases to a minimum, but rising oil prices affects everything from operational and transport costs to the price of packaging.

For customers, elevated energy costs and market uncertainty is denting business confidence and some major projects, including the OpenAI Stargate project, are being shelved until conditions improve. Big infrastructure projects, such as HS2 and Sizewell C, are pushing up crushed rock volumes (+1% quarter-on-quarter) but there aren't enough major schemes under construction to make up for shortfalls elsewhere.

Construction demand for housebuilding materials remains low. Weak demand from buyers and a lack of developments in progress means very little is getting built or bought. If we are to see any return to growth in housebuilding this year, we need the Government to work harder to release the bottlenecks in planning and to drive demand and affordability. An updated version of the Help to Buy scheme would certainly support the latter, and we all need to get behind calls from the MPA and campaigns such as Jewson's Let's Get Britain Building – NOW!

Despite all this, I am still confident there will be pockets of growth this year. With jet fuel shortages on the horizon, it could be another year for staycations and an uptick in RMI. In Q2 we are already seeing an increase in bagged cement volumes which started when the rain stopped, and it has been sustained. Hopefully this will continue throughout the rest of the year?

If we are to see any return to growth in housebuilding this year, we need the Government to work harder to release the bottlenecks in planning and to drive demand and affordability.

Expert Panel

Paint

(Part of Decorating)

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

UK Trade Paint volume held up in Q1 2026, but the underlying picture is mixed, and the outlook for construction suggests there is increasing pressure ahead.

The market is essentially flat year-to-date at **+0.2%**, however momentum has softened with the rolling Moving Annual Total growth rate easing (from **+1.8% to +0.8%**), as a strong March 2025 comparator dropped out. March 2026 itself was positive year-on-year (+1.1%) but working-day adjusted performance indicates demand was weaker than the headline suggests. Persistent rain in the first two months of the year affected building generally and external work particularly.

From a category perspective, the first quarter performance was supported by **premium emulsion** (with aesthetic and durable solutions like Dulux Heritage and Dulux Trade Diamond Matt), which is significantly ahead year-to-date (**+10.2%**), alongside a stronger mix into **1Q emulsions** (such as Dulux Trade Vinyl Matt) versus 2025. We continue to see a positive performance from **coloured emulsion** which drives value and a positive mix within the category, demonstrating that homeowners and clients are wanting to transform spaces.

The construction pipeline is likely to have a further softening of the market, as set out in the Construction Products Association's Spring 2026 forecast, with construction output predicted to fall by -2.5% in 2026, with significant declines forecast of -7.0% for Private Housing, the largest construction sector, and -8.0% for Private Housing RMI (Repair Maintain Improve), the second largest sector. These two are the largest sector demand drivers for Trade Paint volume.

Despite this, lightside decorative materials continue to provide opportunities to drive value and attachment rates to increase basket spend, alongside other construction categories.

For the rest of 2026, we expect to see the Trade paint market continue to soften, particularly in the second half when the effects of the Middle East war are likely to be felt. But there are causes for optimism, particularly from a value perspective, due to market sector and category trends, alongside a diverseness in UK regional performance.

For the rest of 2026, we expect to see the Trade paint market continue to soften, particularly in the second half when the effects of the Middle East war are likely to be felt

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

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

January and February were dominated by relentless rain, making it the wettest start to a year for decades. Construction suffered, with developers and main contractors finding it impossible, or at least not cost effective, to continue to build.

With additional costs to keep sites accessible and brick work gangs stood down for weeks on end, the lost capacity will never be fully recovered. However, brighter weather in March saw a welcome bounce in activity, as builders did their best to recover lost ground. Most reported good volumes which continued into April, overall comparing the year to date favourably with Q1 2025.

Geopolitical tensions and their effect on inflation will knock consumer confidence and dampen demand this year. As households battle with inflation, most notably on energy and fuel, decisions to improve or move are being put on hold. The CPA has again lowered its forecast for residential construction output. Labour's housebuilding target has never looked further out of reach. With mortgage rates and inflation rising, the prospects of a cut in the Bank of England base rate are dwindling fast, but we are desperate for some stimulus.

We can't control the market but, as a challenger brand, our sales team is extremely active, focusing on the core activities that deliver results: working smart, supporting our partners with stocking, specification and installation advice, acting as an extension of merchants' sales teams, and bringing them orders.

The US-Iran conflict has unavoidably accelerated cost price inflation in transport and in materials such as PVC profiles, aluminium and glass, which are highly impacted by oil prices. An exceptional price increase in the second half of the year will be necessary for Keylite, but will be kept to a minimum as we recognise the impact rising prices have on construction activity.

Keylite's focus is on innovation. We have brought multiple new products to market this year, creating solutions to the Future Homes Standard for developers, and creating margin opportunities for merchants. To promote some of these new innovations, in conjunction with our sister brands in the Keystone Group, we are proud to have hosted 175 National and Regional developers, SAP assessors and specifiers, at a series of Innovation Days between 2025 and 2025.

As households battle with inflation, most notably on energy and fuel, decisions to improve or move are being put on hold.

The CPA has again lowered its forecast for residential construction output. Labour's housebuilding target has never looked further out of reach.

Expert Panel
Website & Product Data Management Solutions

Chris Aitken, ERP Consultant of ECI Software Solutions is BMBI's Expert for Website & Product Data Management Solutions

It's been a tough start to the year for Britain's builders' merchants. The war in the Middle East is seriously weakening the economy and interrupting global supply chains, and the Construction Products Association has downgraded its 2026 forecast to a -2.5% contraction in construction activity with private housebuilding and RMI most affected. After a difficult end to 2025, this is not the Q1 merchants were hoping for.

With margins under increasing pressure, merchants are searching for new ways to optimise operations and improve customer retention in very difficult market conditions. Like many other sectors and industries, AI is increasingly seen as the 'go to' business improvement. But without proper execution, results can be mixed.

That's because there are several common misconceptions about AI. In our experience, many businesses think they're using AI when they're just using automation. For example, an automated invoicing system sends out customer invoice reminders using preset rules, while an AI-driven system learns from historical data and can predict which customers will pay late and adjusts the approach accordingly. That added layer of intelligence is where the magic happens, turning data into insight and real business improvement.

For builders' merchants, AI can be a highly effective tool for customer retention. There are many applications, but one could be to help identify at risk accounts by using AI to look for pattens in order frequency, order size and category breadth. Is this customer buying more or less? Are they now getting certain products elsewhere?

These behavioural insights become the basis for a timely call or visit from the sales team. AI can't replace the personal touch, the relationship and power of a conversation: it can support it. What can we do to win your business back? Using AI tools, shifts the focus from reactive to best practice proactive customer management and retention. There has never been a more appropriate time to introduce AI to your operations. With it, merchants can drive efficiency and customer satisfaction in the short term and keep their foundations solid and build for future growth as the market recovers.

ECI Spruce eCommerce offers merchants AI assisted support across 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.

With margins under increasing pressure, merchants are searching for new ways to optimise operations and improve customer retention in very difficult market conditions.

Like many other sectors and industries, AI is increasingly seen as the 'go to' business improvement. But without proper execution, results can be mixed.

Expert Panel
Plumbing & Drainage

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

Quarter 1 2026 has been exceptional, but not in ways a drainage system business might hope for!

Some regions reported over 50 consecutive days of rain, making normal ground works on construction sites impossible, resulting in weak demand at the merchant.

February closed with much improved ground conditions and contractors rushed to catch up on delayed schedules. But the market for RMI and new build housing remains in the doldrums with further slides in planning applications and housing starts.

Whatever government policy exists on housing, it has failed to result in growth. It's the single biggest gap in the UK market for construction materials with NHBC reporting Q1 registrations down 6% on Q1 2025, citing weak consumer confidence and rising mortgage costs.

Then March woke up to an Epic Fury, throwing the polymer market into an immediate upward cost spiral for all producers of plastic building materials. All manufacturers had to start the process of recovering the significant increase in distribution costs in line with oil hikes. We all hoped it would be limited and short lived, but it was the start of the biggest increase in Polymer prices since the Covid crisis. The speed of implementation is related to the relative stagnation in the market, which over prior periods increased competition leading to tighter margins throughout the industry, reducing manufacturers' ability to absorb significant raw material cost increases.

Our industry needs stability, starting with a consistent flow of projects which begin on time, enabling contractors to maintain appropriate levels of manpower. It needs consistency within the supply chain, enabling manufacturers to match resource to demand and for merchants to deliver the service to the trade.

Even in a soft market, nothing changes in terms of the service which live projects require. Weak markets can be testing times for manufacturers and merchants, and we continue to jointly seek ways to add value to our customers. Brett Martin picked up another Supplier of the Year award in Q1, which reinforces our belief that excellence in customer service remains the best protection for sustainable business.

Whatever government policy exists on housing, it has failed to result in growth.

It's the single biggest gap in the UK market for construction materials with NHBC reporting Q1 registrations down 6% on Q1 2025, citing weak consumer confidence and rising mortgage costs.

Expert Panel

Plastic Plumbing for Hot and Cold Water Systems

Polypipe Building Products

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

For decades, the construction industry has treated fragmentation, bringing multiple brands or parts together to create a full system of products, as standard procedure. However, the regulatory landscape of 2026 has rendered this 'pick and mix' approach a significant liability. With the Building Safety Act (BSA) fully embedded and Construction Products Reform setting new standards for traceability, integration is no longer a strategic choice, it is a legal imperative driven by the necessity for verified performance.

The BSA has fundamentally shifted the goalposts, demanding a rigorous 'Golden Thread' of information. System integrity alone is no longer sufficient, the regime now demands tested and verified system performance. For housebuilders, fragmentation creates weak links in the digital chain. Assembling systems from disparate manufacturers makes demonstrating compliance incredibly difficult. Conversely, a 'single system' philosophy, where a kit of parts is tested as a unified whole, provides the clear, traceable performance evidence required to satisfy stringent audits.

This evidence-led approach is vital for the net-zero transition. While integrated systems are often cited as essential for peak efficiency in low-temperature heating, such as air source heat pumps and underfloor heating, regulators now rightly demand the data to prove it. By embracing solutions engineered for compatibility, we move away from anecdotal claims toward data-backed assurance. This systemic approach eliminates the friction of mismatched components and the ad-hoc adaptations that compromise compliance and build integrity.

At Polypipe Building Products, we believe moving toward a single-manufacturer system is primarily about accountability. When a system is designed, tested, and certified as a complete unit, it benefits from consistent quality control and integrated record-keeping. This simplifies the Golden Thread and eliminates the admin burden caused by fragmented supply chains, providing installers with one point of contact and a verified route of redress.

To meet the expectations of the National Regulator for Construction Products, we must prioritise holistic, verified performance over individual component price points. Integration simplifies the build, ensures the digital record remains unbroken, and delivers the sustainable homes the market demands. Those clinging to fragmented models risk more than just inefficiency; they risk operating outside the legal requirements of a modern industry.

To meet the expectations of the National Regulator for Construction Products, we must prioritise holistic, verified performance over individual component price points

Expert Panel
Softwoods & Engineered Wood

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

The UK market for both softwoods and engineered wood products has been subdued in Q1 2026.

Merchant and distributor restocking in January generated volumes broadly in line with January 2025. However, follow-up demand was slower than expected, reflecting a cautious approach to stockholding.

Wet weather in February across the majority of England and Wales certainly weakened demand from the housebuilding sector and impacted the stock build of timber landscaping products in preparation for the outdoor season. Metsä Wood supported merchant customers by incentivising early stocking of timber landscaping products, to ensure they are well placed to service their customers when needed.

March brought further uncertainty with the conflict in Iran, and wider geopolitical and economic pressures compounding existing challenges around fuel, energy, borrowing costs, and consumer confidence. These factors are shaping activity in the housebuilding sector, prompting the Construction Products Association (CPA) to revise down its 2026 outlook. Its latest Spring forecast suggests a much more difficult year for construction, including a forecast decline in private housing output.

Against this backdrop, customers continue to manage stock carefully and seek value from their supply base. This is reflected in purchasing decisions, for example, forward sales of sawn timber products shifting towards landed 'quay stocks' as businesses seek greater flexibility in an uncertain market.

Inflationary pressures remain a key consideration across the supply chain, with many businesses facing higher costs. The timber market is affected by these wider pressures, though to a lesser extent than other sectors. Metsä Wood continues to work hard to mitigate these pressures where possible, while supporting customers with reliable supply, clear communication and a product range aligned with market demand.

Project costs across both RMI (Repair Maintenance & Improvement) and construction remain under pressure, and this will likely further weaken demand over the coming months. Market conditions will remain challenging, and we will continue to work closely with our customer base to support new opportunities that arise, alongside inventory planning and creating value in a more cautious trading environment.

Wet weather in February across the majority of England and Wales weakened demand from the housebuilding sector and impacted the stock build of timber landscaping products in preparation for the outdoor season

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

Gas boilers continue to dominate the UK heating market in Q1 2026, with over 80% of UK households using gas for central heating some replacement demand is unavoidable. But sales of domestic gas boilers and hot water cylinders in Q1 were down from Q1 2025. Boiler Upgrade Scheme (BUS) applications were 22% up compared with December 2025 but given the Iran conflict and its impact on cost of energy, it remains to be seen if applications convert to installations. As the primary low-carbon technology, heat pumps represent most BUS applications.

Consumer intent is growing, but the ability to deliver is restricted by installer availability, confidence, and the practical complexity of low-temperature system design. Those constraints will only be resolved through simpler propositions, better training and closer collaboration across the supply chain. The Future Homes Standard is already shaping developer behaviour, with fossil fuel systems increasingly designed out at concept stage. More materially, the transition into Clean Heat Market Mechanism Year 2 marks a significant escalation. From April 2026, manufacturer obligations increase from 6% to 8% of boiler sales, accelerating investment in heat pump portfolios, installer training and commercial partnerships.

Disruption to global energy flows in Q1, including closure of the Strait of Hormuz, drove sharp increases in kerosene and heating oil prices (up to x3), disproportionately impacting off-grid households and further strengthening the long-term case for electrification. Oil boiler users have had to accept significant and rapid price increases in the cost of oil. These, almost always off-grid properties, should be prime targets to move to heat pumps, but the problem of skilled installers in often remote locations is amplified.

The UK housing stock is old and inefficient, and meeting net zero ambitions alongside housing delivery targets cannot be achieved through incremental upgrades. Success will depend on collaboration rather than substitution, with developers and landlords increasingly seeking partners who can co-engineer integrated, low-risk solutions supported by performance assurance, simplified installation and transparent lifecycle data.

The UK heating transition is progressing pragmatically, with momentum increasingly shaped by regulation, investment and energy security considerations rather than short-term market cycles. The additional factor of climate change, resulting in prolonged periods of seasonally abnormal milder spells, also has an inevitable impact on the overall market.

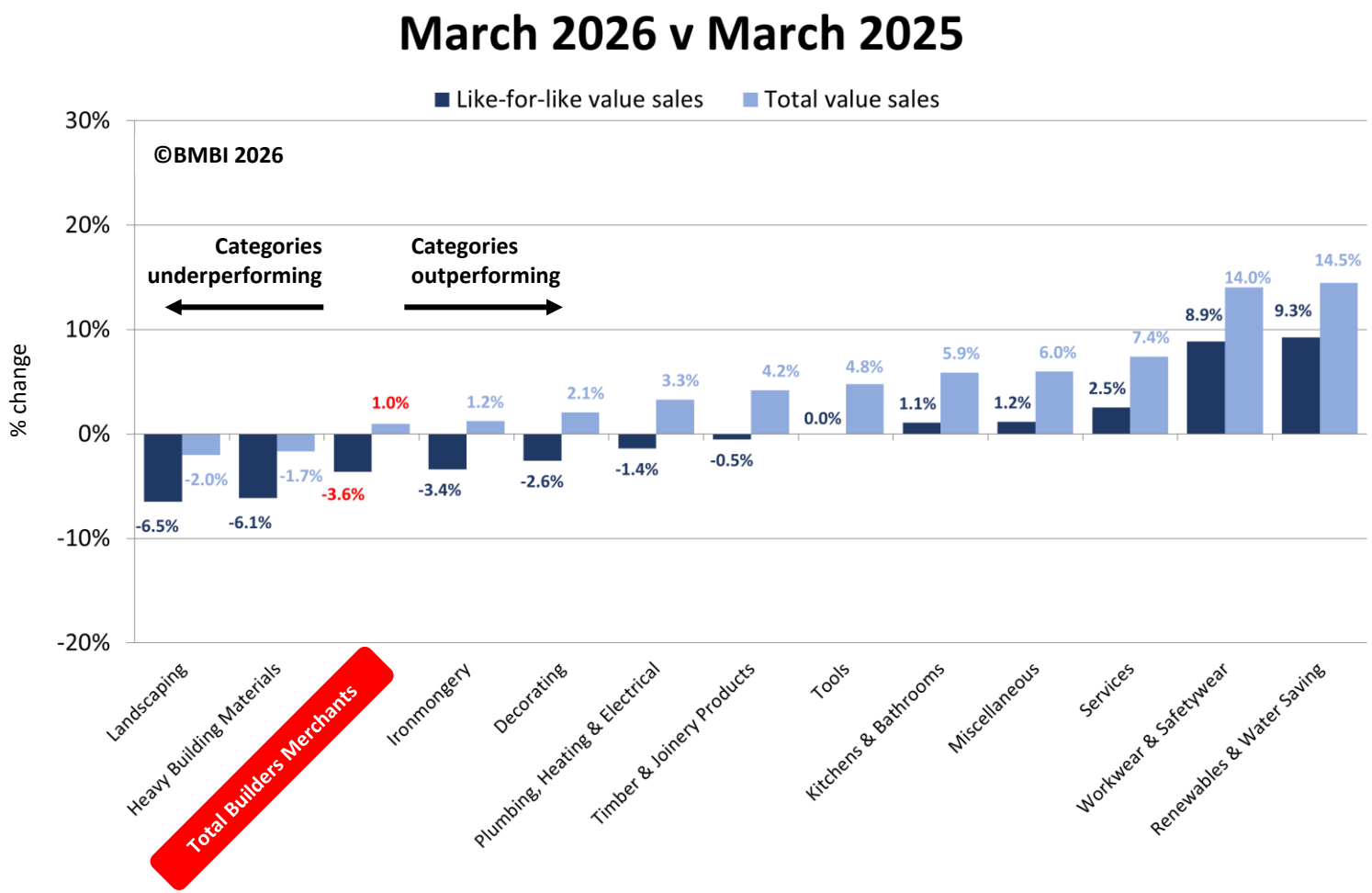
The UK heating transition is progressing pragmatically, with momentum increasingly shaped by regulation, investment and energy security considerations rather than short-term market cycles.

Latest month v last year

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

22 trading days this month v 21 trading days last year.
Like-for-like sales are adjusted to remove the effect of trading day differences.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

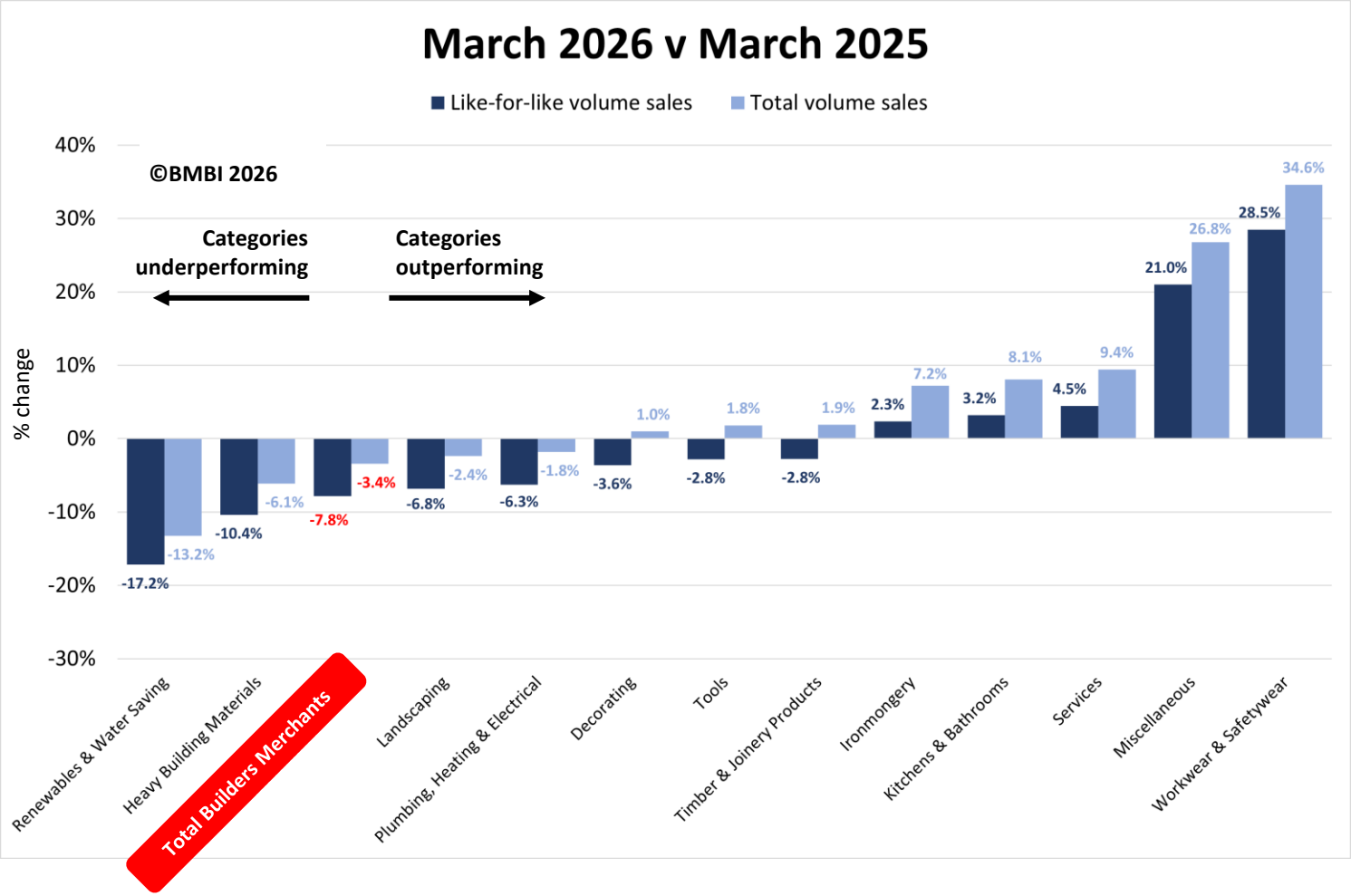
Renewables & Water Saving was the standout category, closely followed by Workwear & Safetywear.

Latest month v last year

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

22 trading days this month v 21 trading days last year.
Like-for-like sales are adjusted to remove the effect of trading day differences.

Builders Merchant Building Index



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

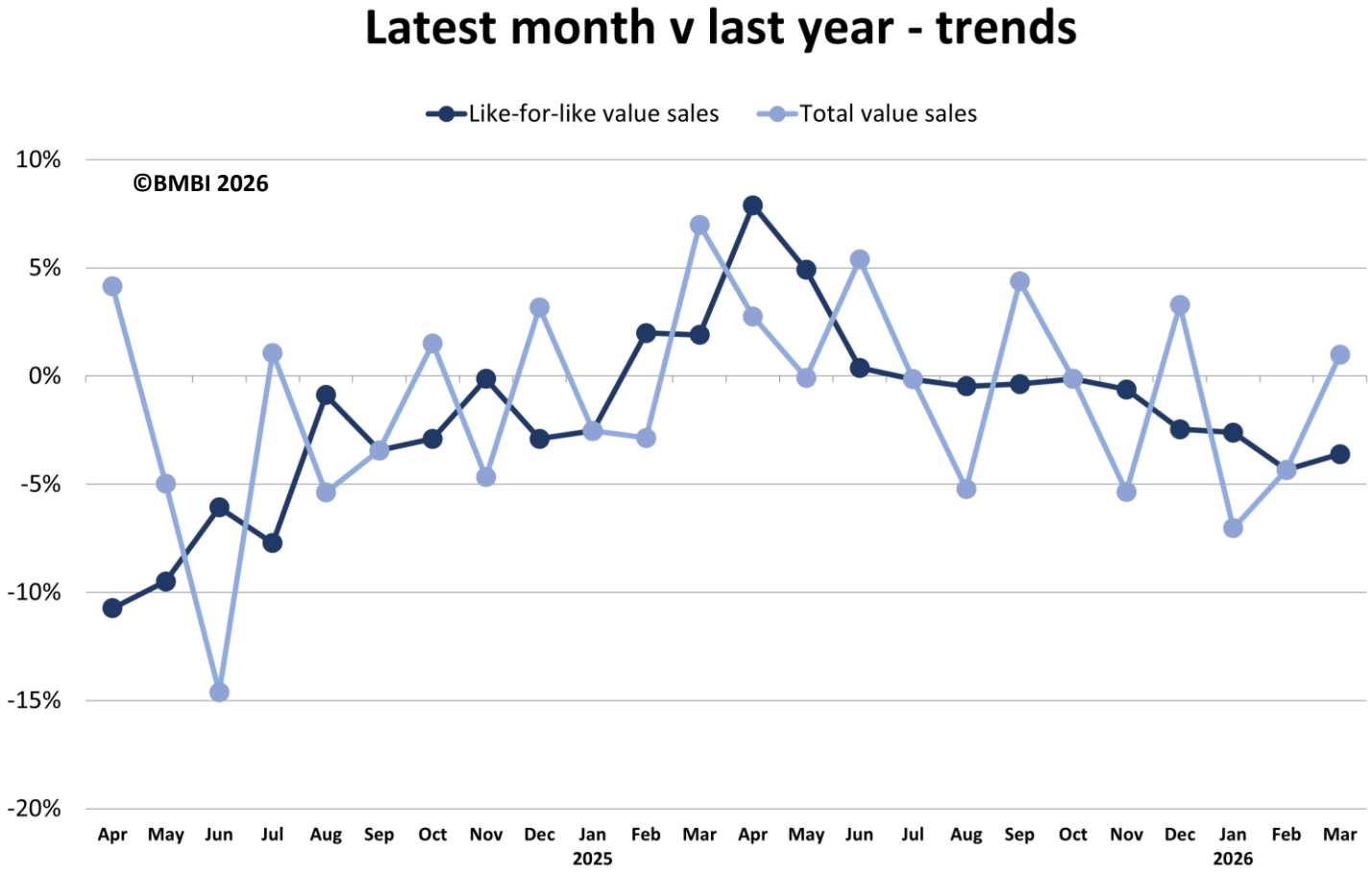
Workwear & Safetywear was the standout category.

Latest month v last year - trends

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

22 trading days this month v 21 trading days last year.
Like-for-like sales are adjusted to remove the effect of trading day differences.

Builders Merchant Building Index



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **like-for-like value** sales were -3.6% lower in March 2026 compared with the same month last year.

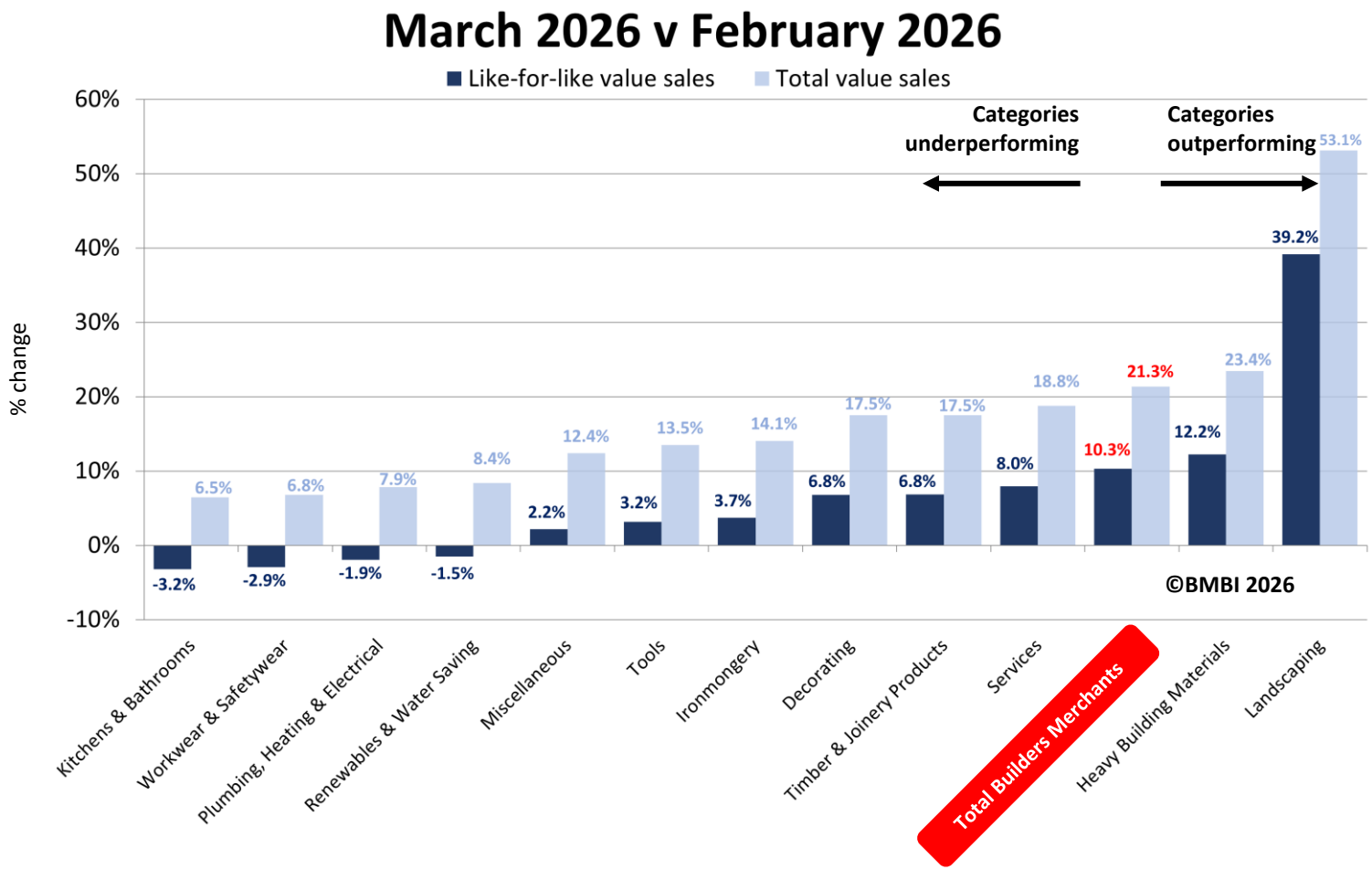
Like-for-like volume sales were down -7.8% but **prices** up +4.6%.

Latest month v previous month

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

22 trading days this month v 20 trading days last month.
Like-for-like sales are adjusted to remove the effect of trading day differences.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **like-for-like value** sales were +10.3% higher in March 2026 than in February 2026.

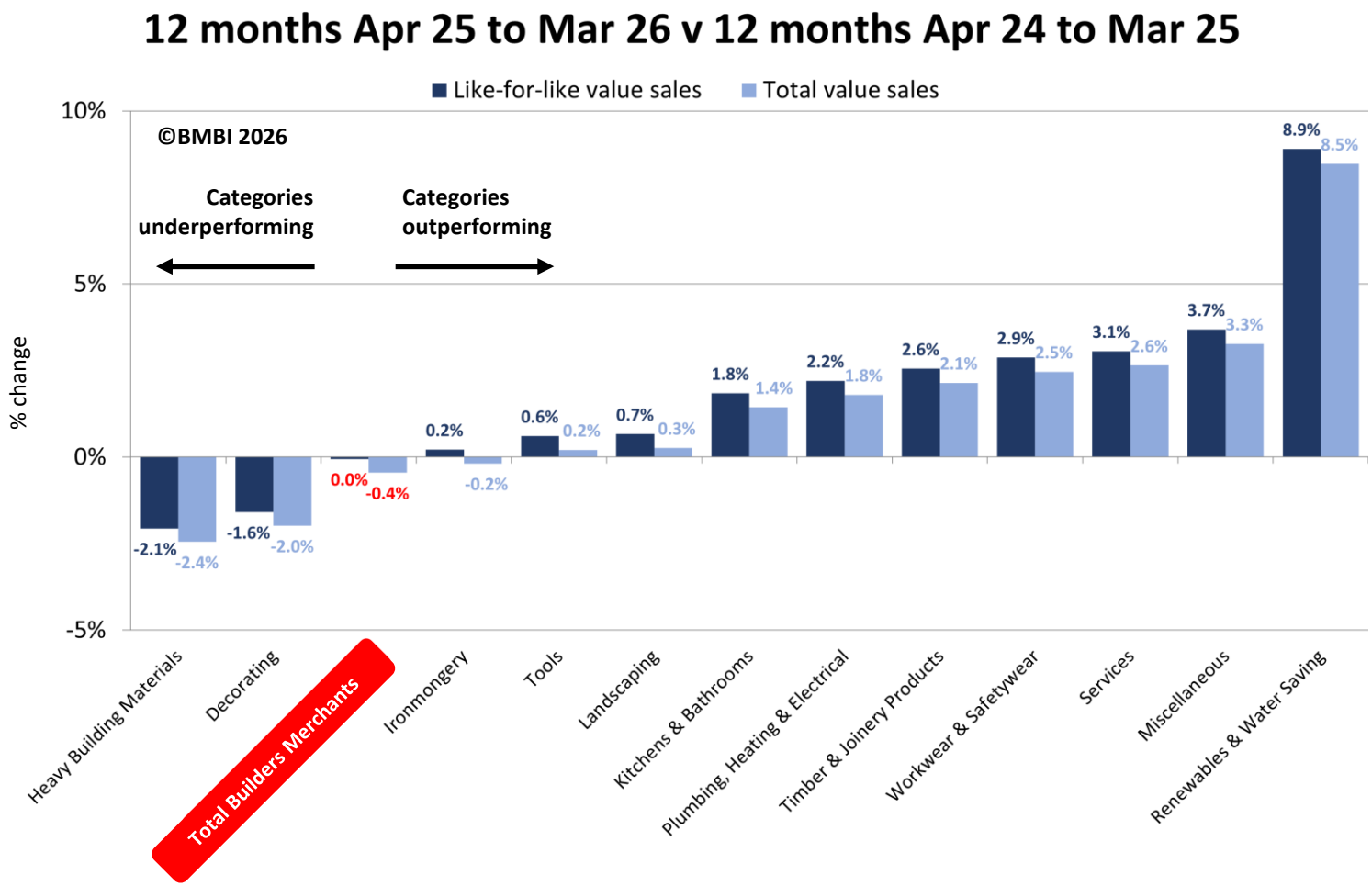
Like-for-like volume sales were up +14.8% but **prices** were down -3.9%.

Latest 12 months v previous 12 months

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

Builders Merchant Building Index

250 trading days this year v 251 trading days last year.
Like-for-like sales are adjusted to remove the effect of trading day differences.



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **like-for-like value** sales in the latest 12 months, April 2025 to March 2026 were unchanged compared with the same period a year earlier, April 2024 to March 2025.

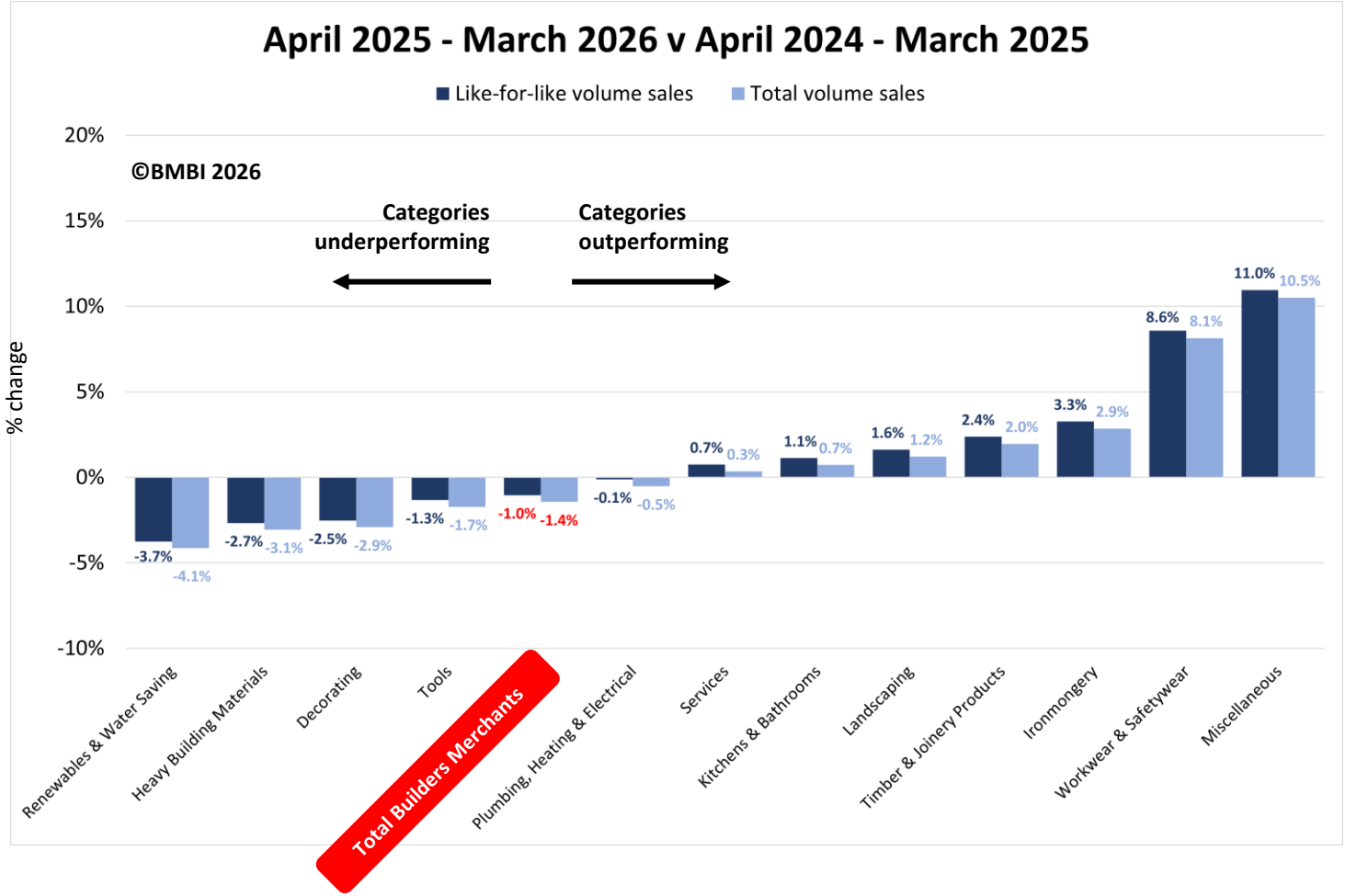
With one less trading day in the latest period, unadjusted value sales were -0.4% lower than in the previous 12 months.

Latest 12 months v previous 12 months

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

Builders Merchant Building Index

250 trading days this year v 251 trading days last year.
Like-for-like sales are adjusted to remove the effect of trading day differences.



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Total Builders Merchants **like-for-like volume** sales in the latest 12 months, April 2025 to March 2026 were -1.0% lower compared to the same period a year earlier, April 2024 to March 2025

Prices rose +1% in the same period

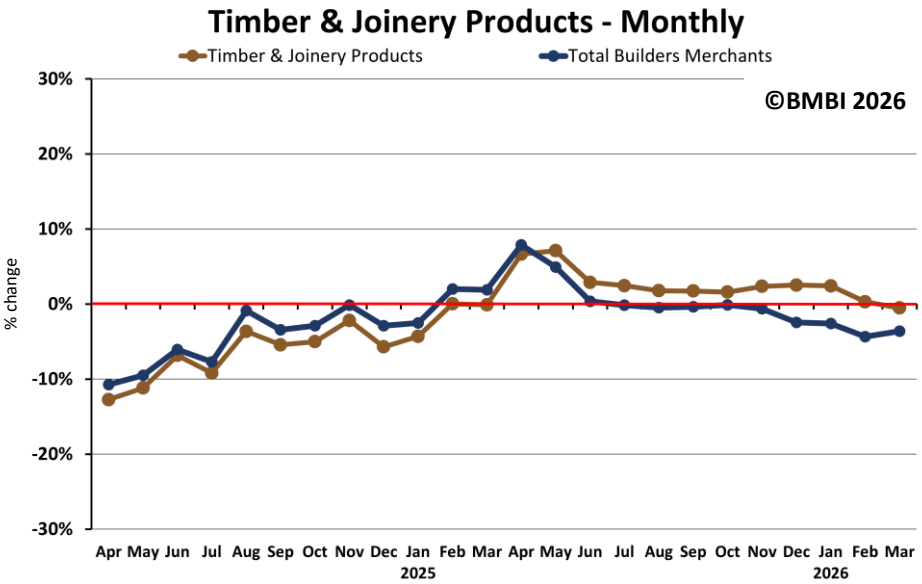
Monthly Year-on-year

Timber & Joinery Products % change

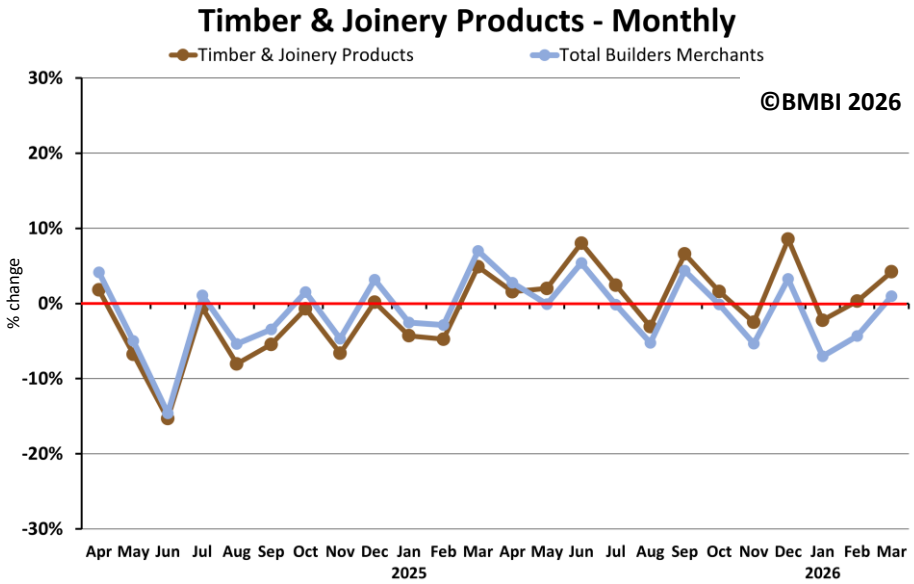
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

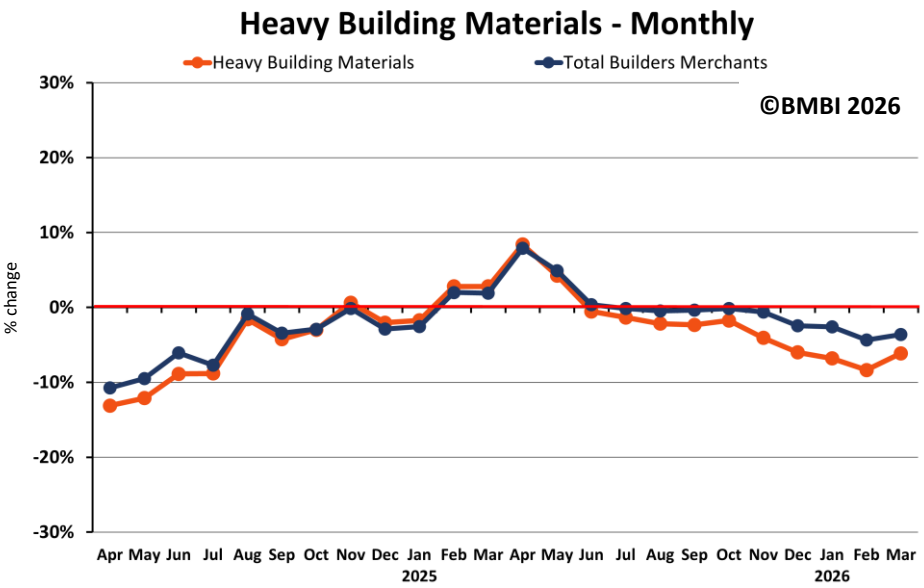
Monthly Year-on-year

Heavy Building Materials % change

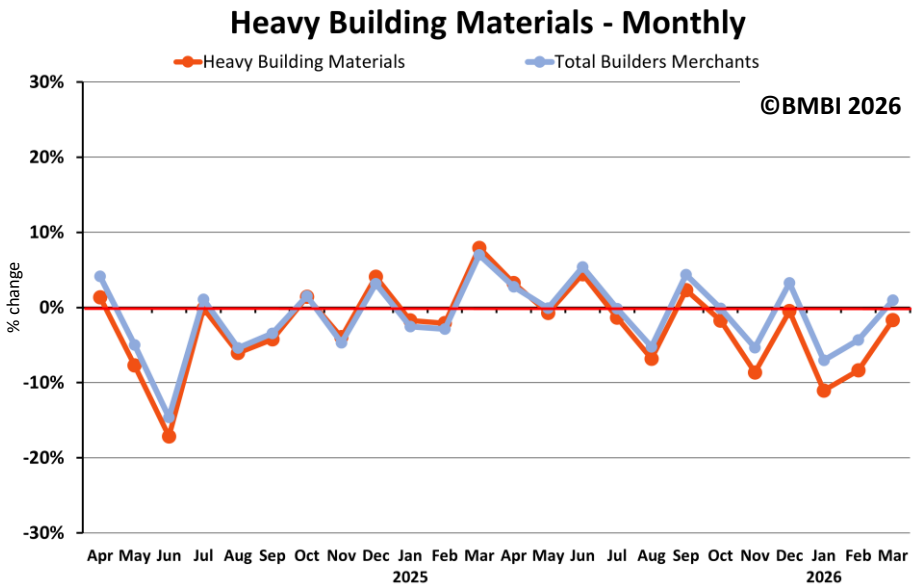
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

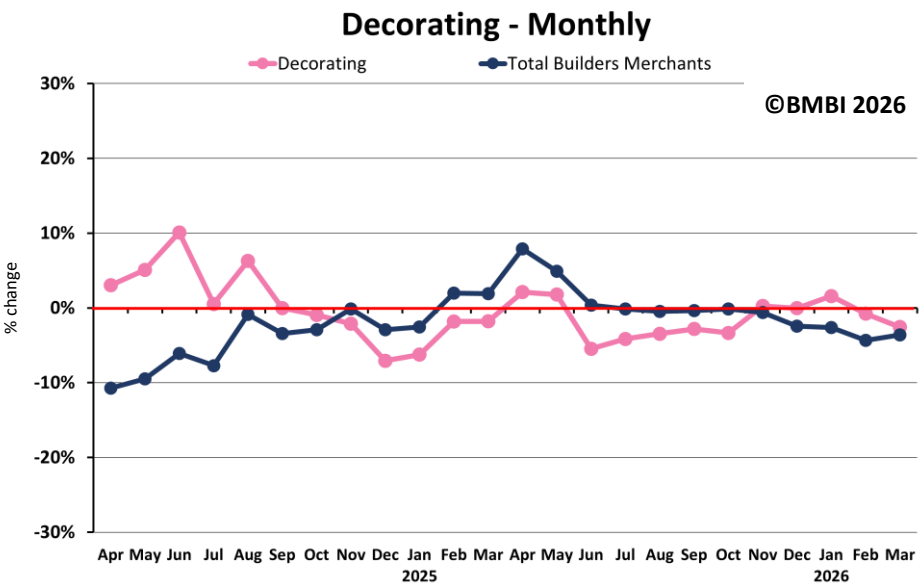
Monthly Year-on-year

Decorating % change

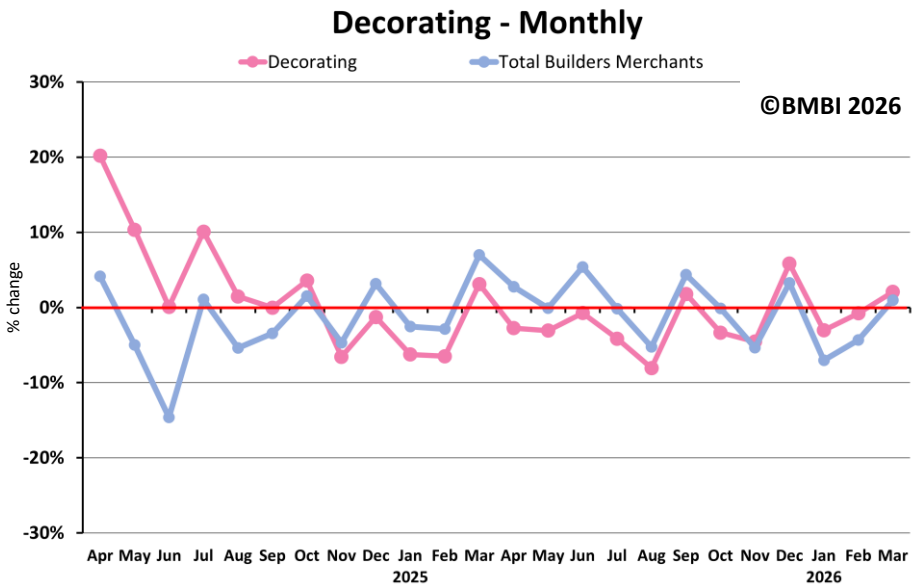
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

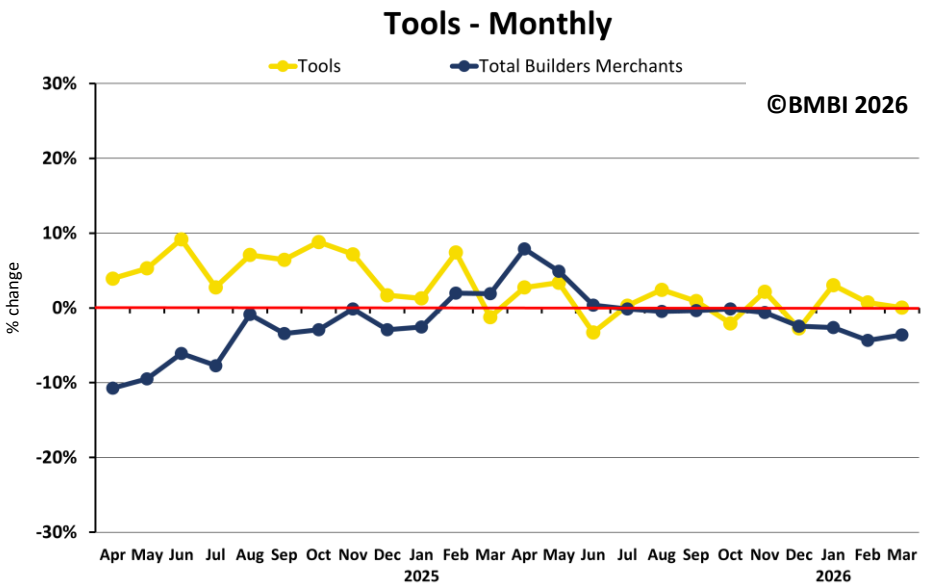
Monthly Year-on-year

Tools % change

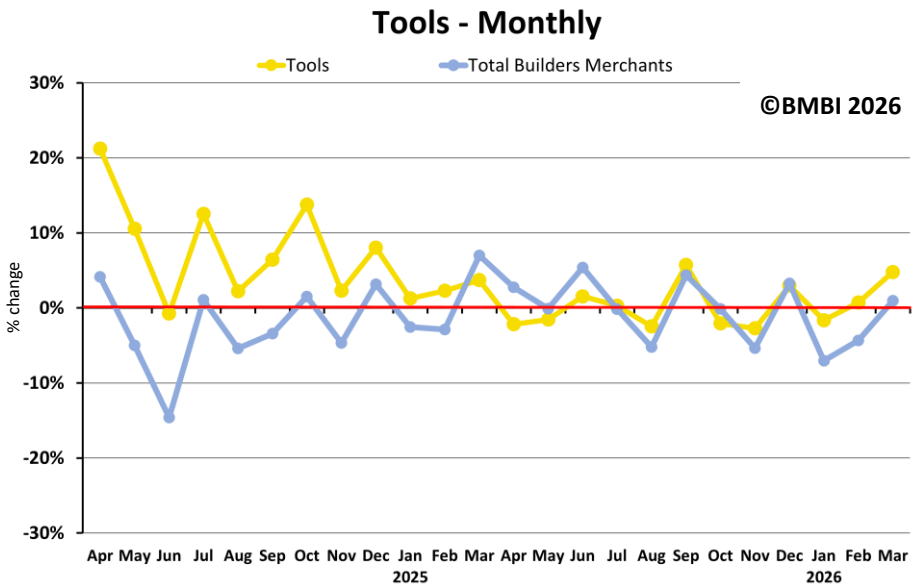
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

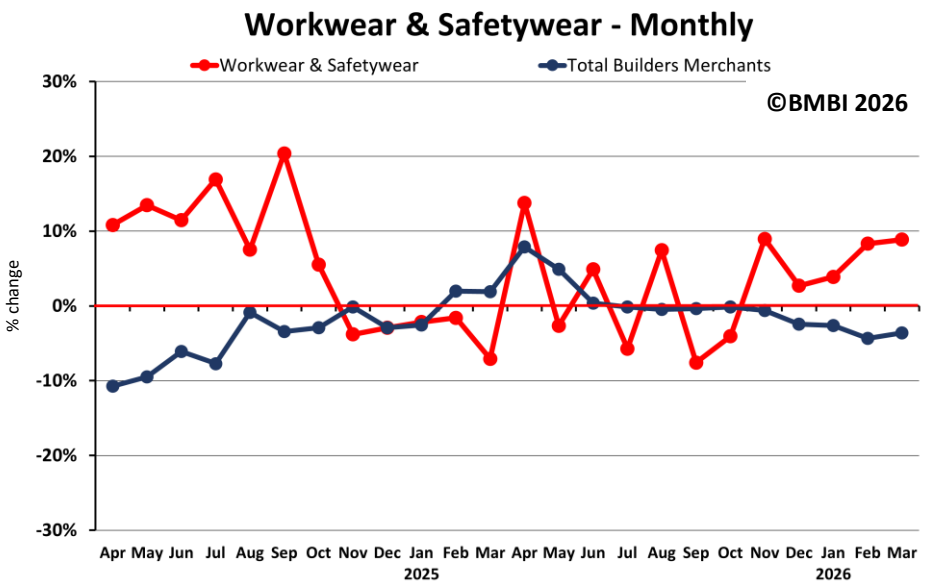
Monthly Year-on-year

Workwear & Safetywear % change

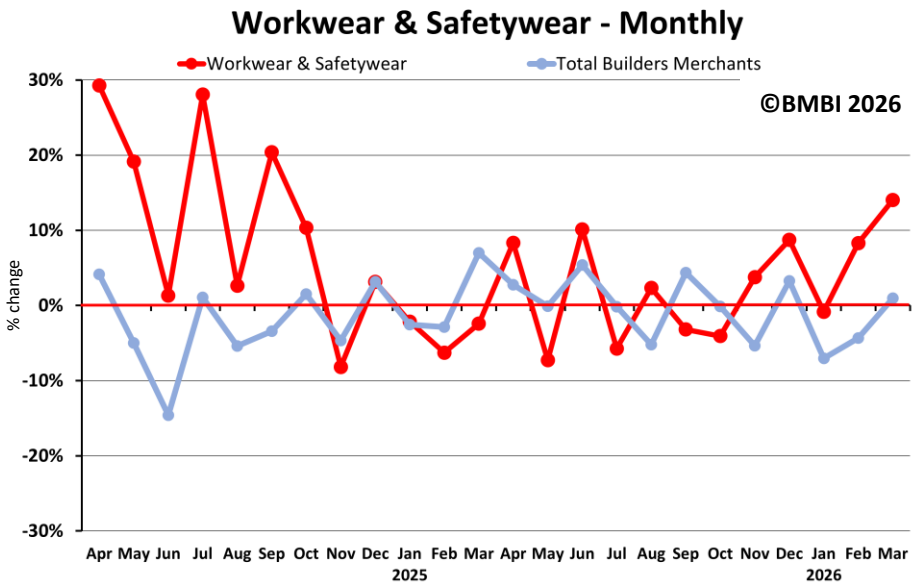
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

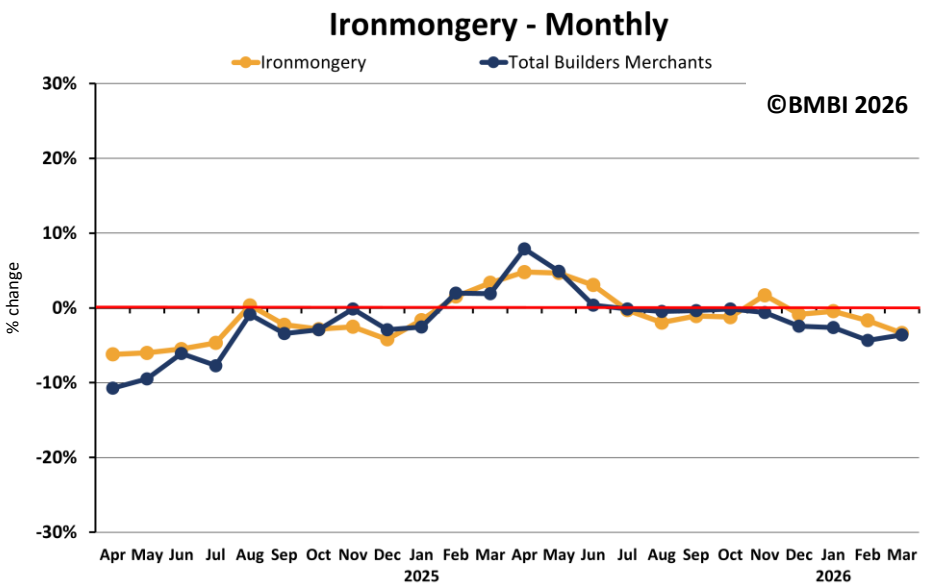
Monthly Year-on-year

Ironmongery % change

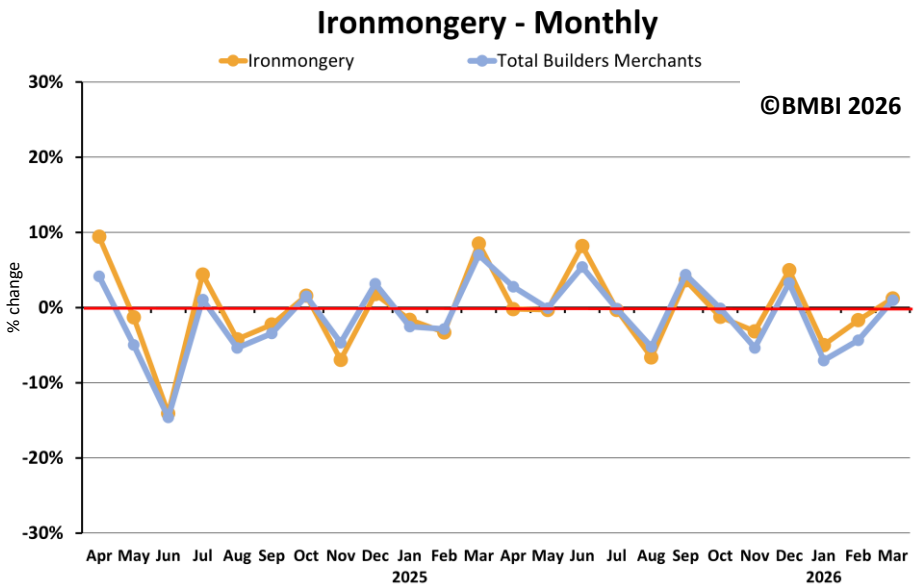
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

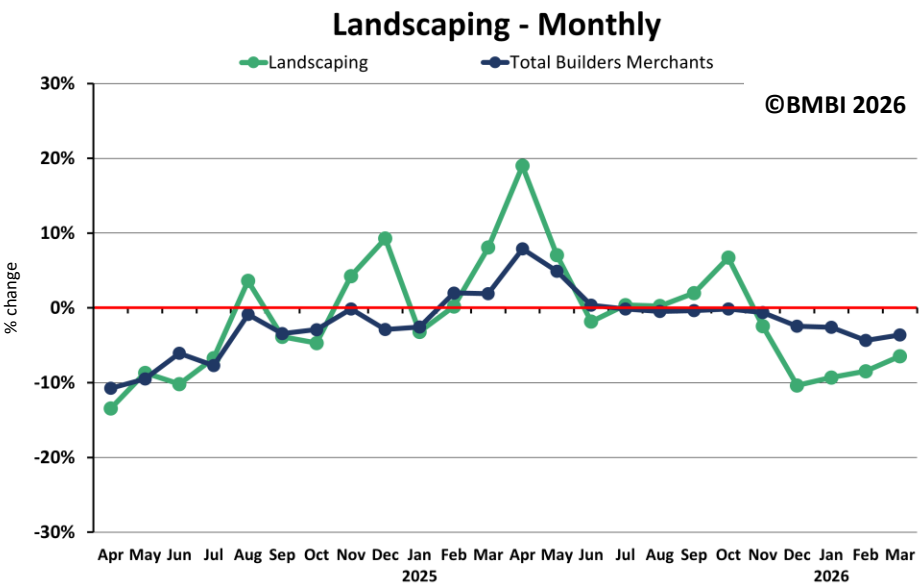
Monthly Year-on-year

Landscaping % change

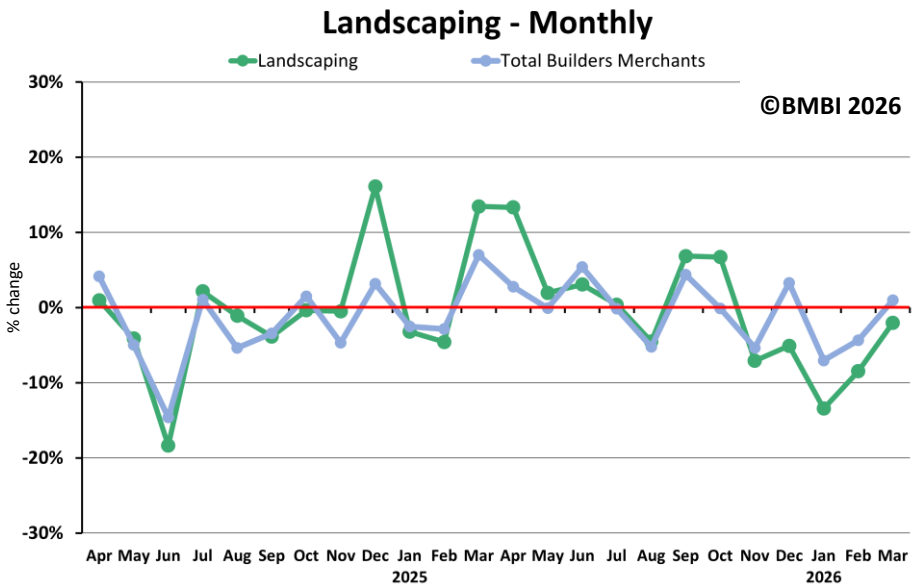
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

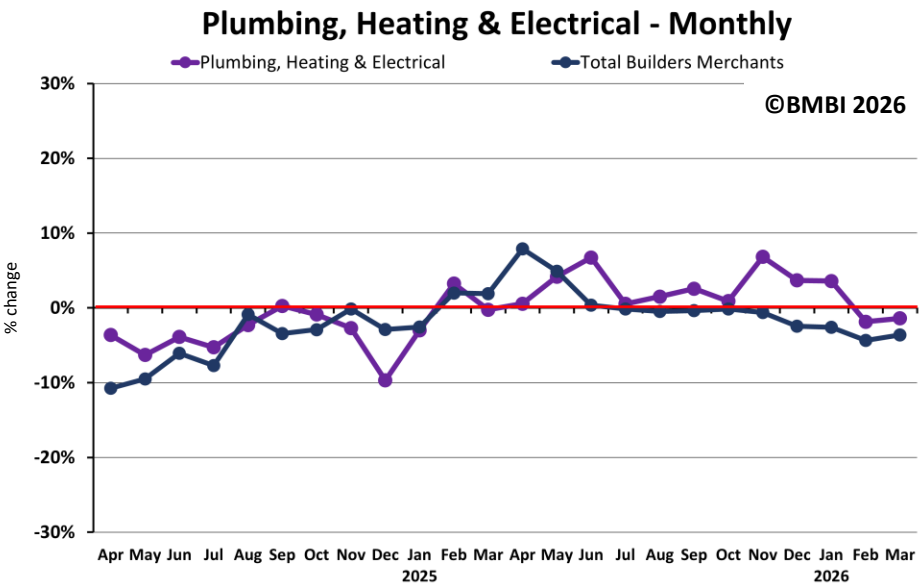
Monthly Year-on-year

Plumbing, Heating & Electrical % change

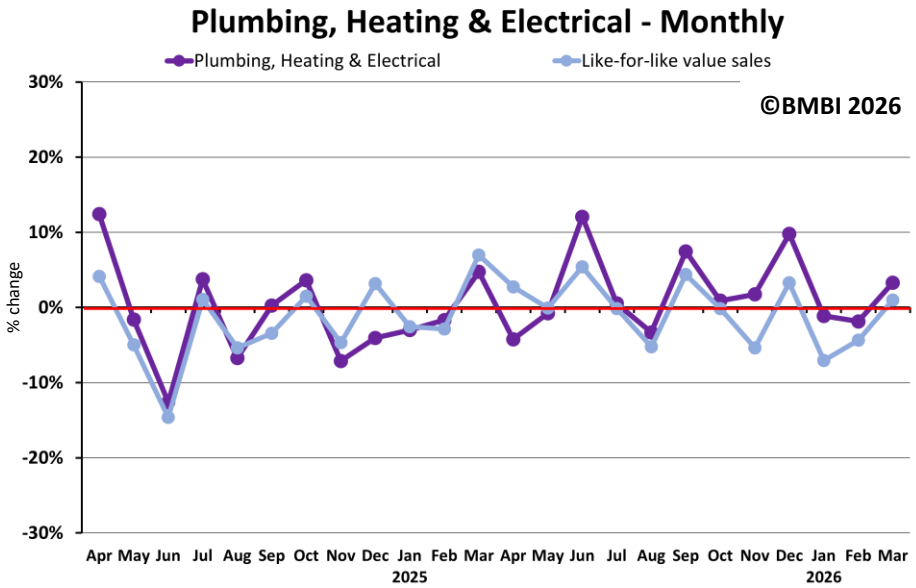
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

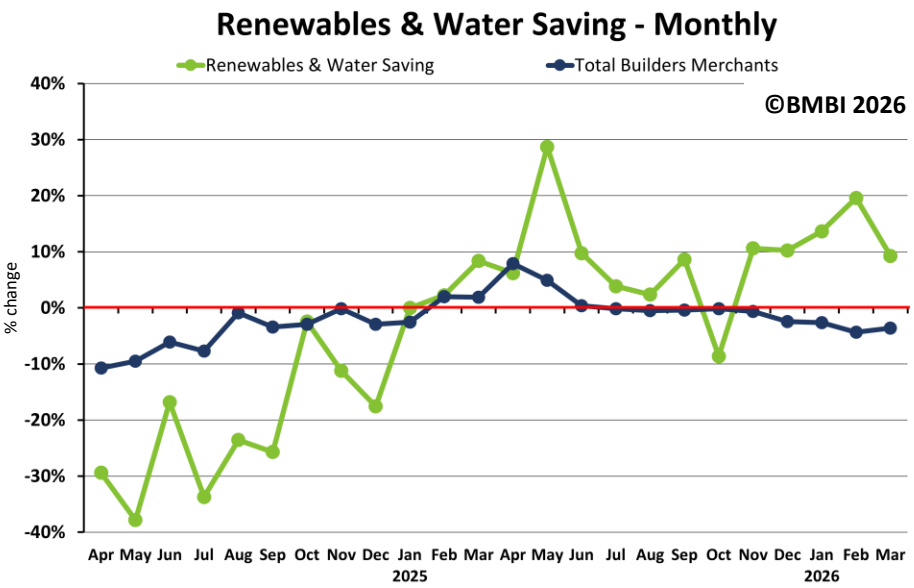
Monthly Year-on-year

Renewables & Water Saving % change

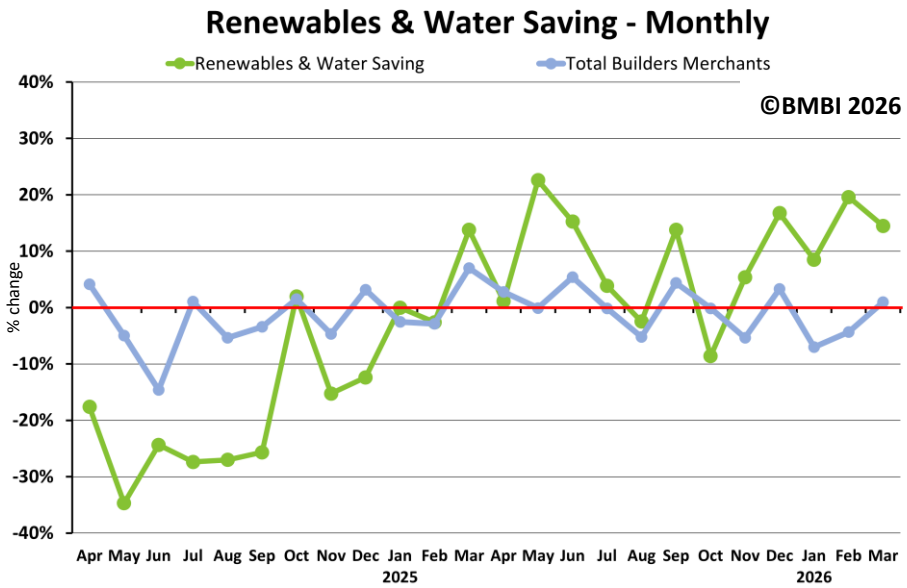
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

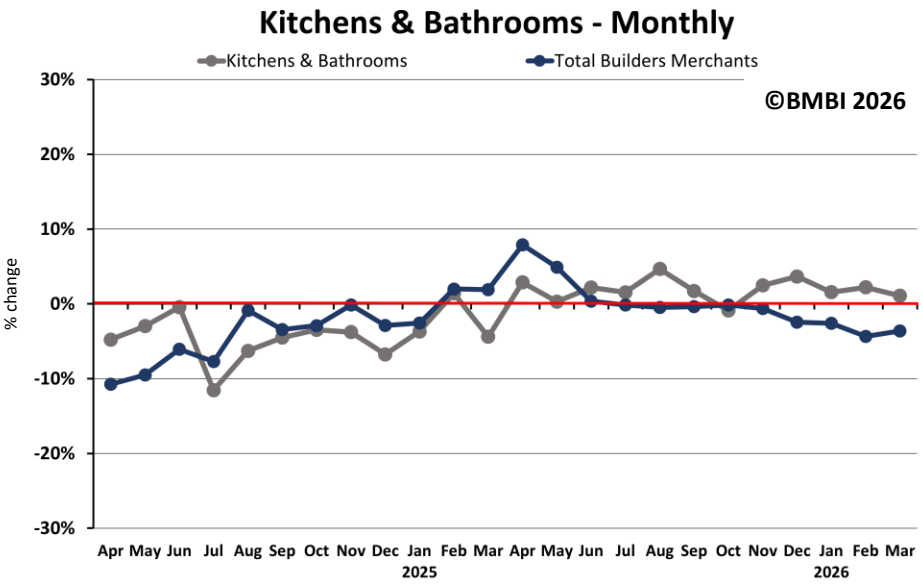
Monthly Year-on-year

Kitchens & Bathrooms % change

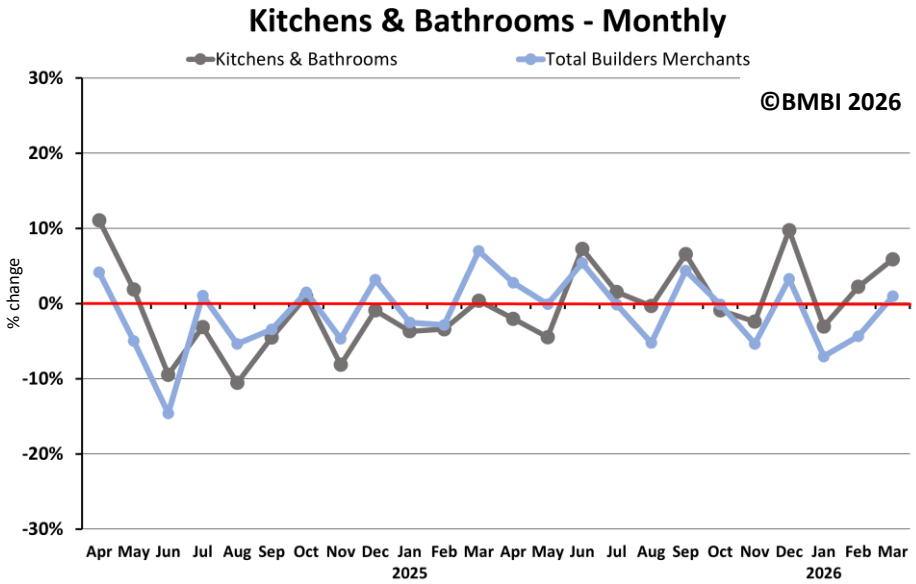
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

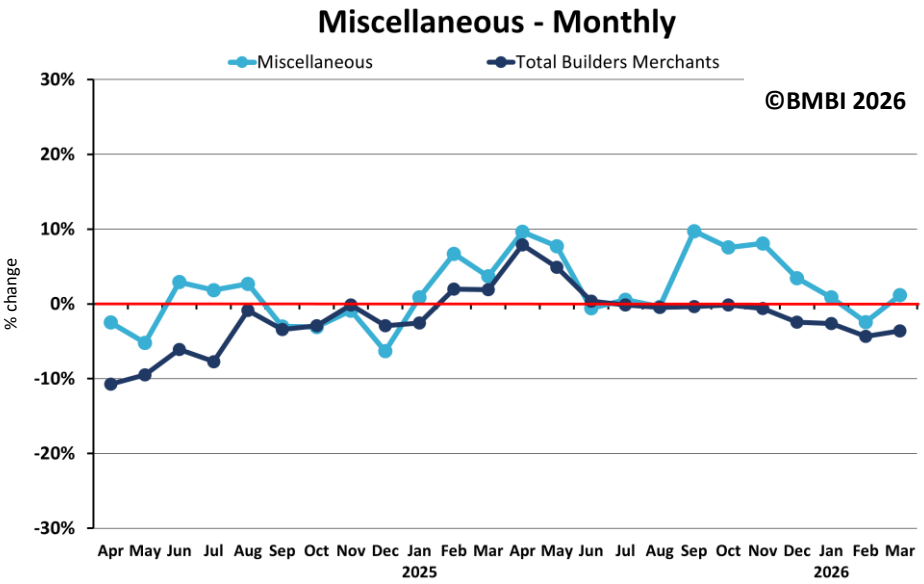
Monthly Year-on-year

Miscellaneous % change

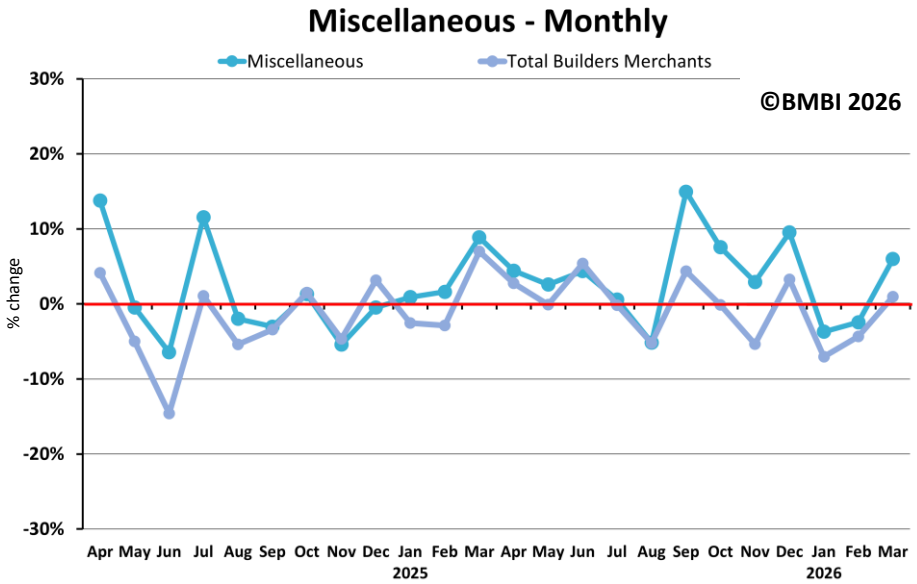
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

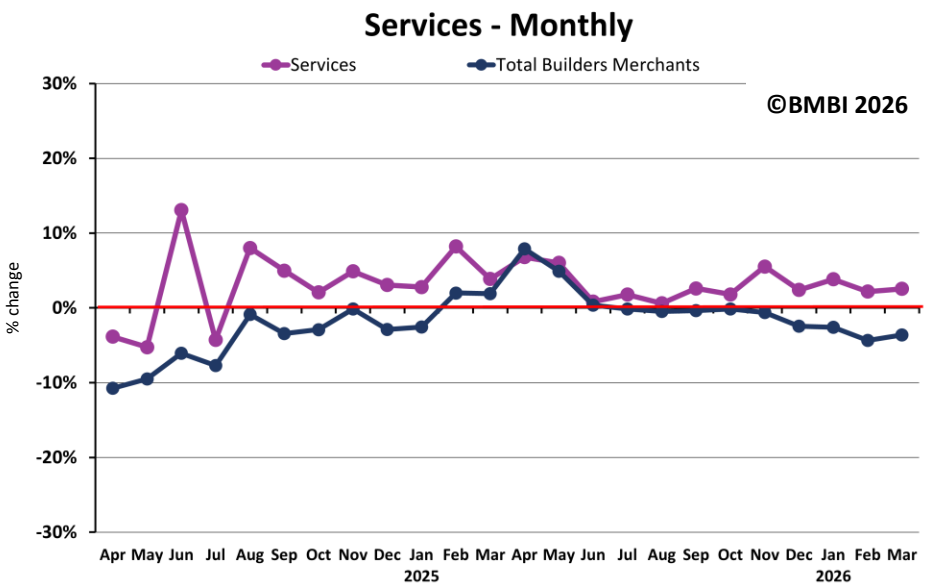
Monthly Year-on-year

Services % change

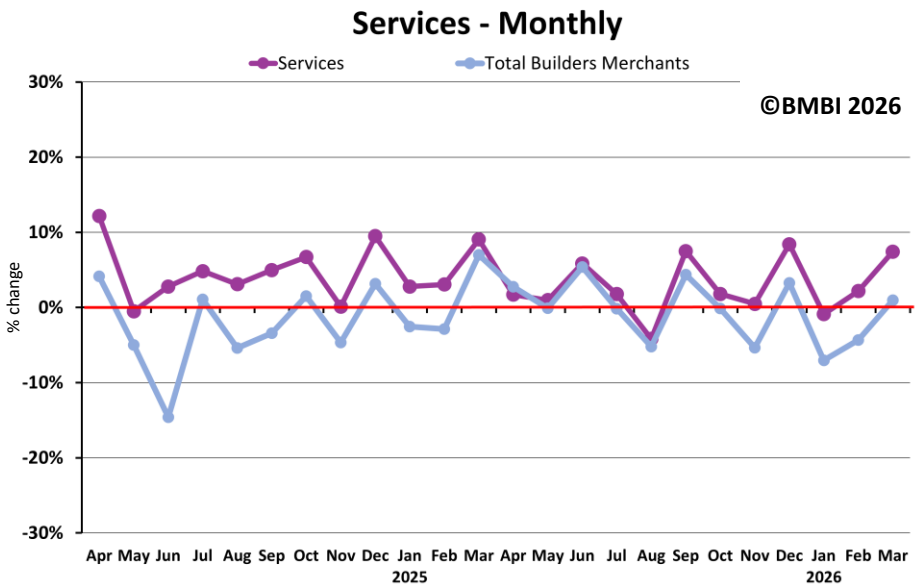
March 2026

Builders Merchant Building Index

Like-for-like value sales



Total (unadjusted) value sales



NIQ GfK

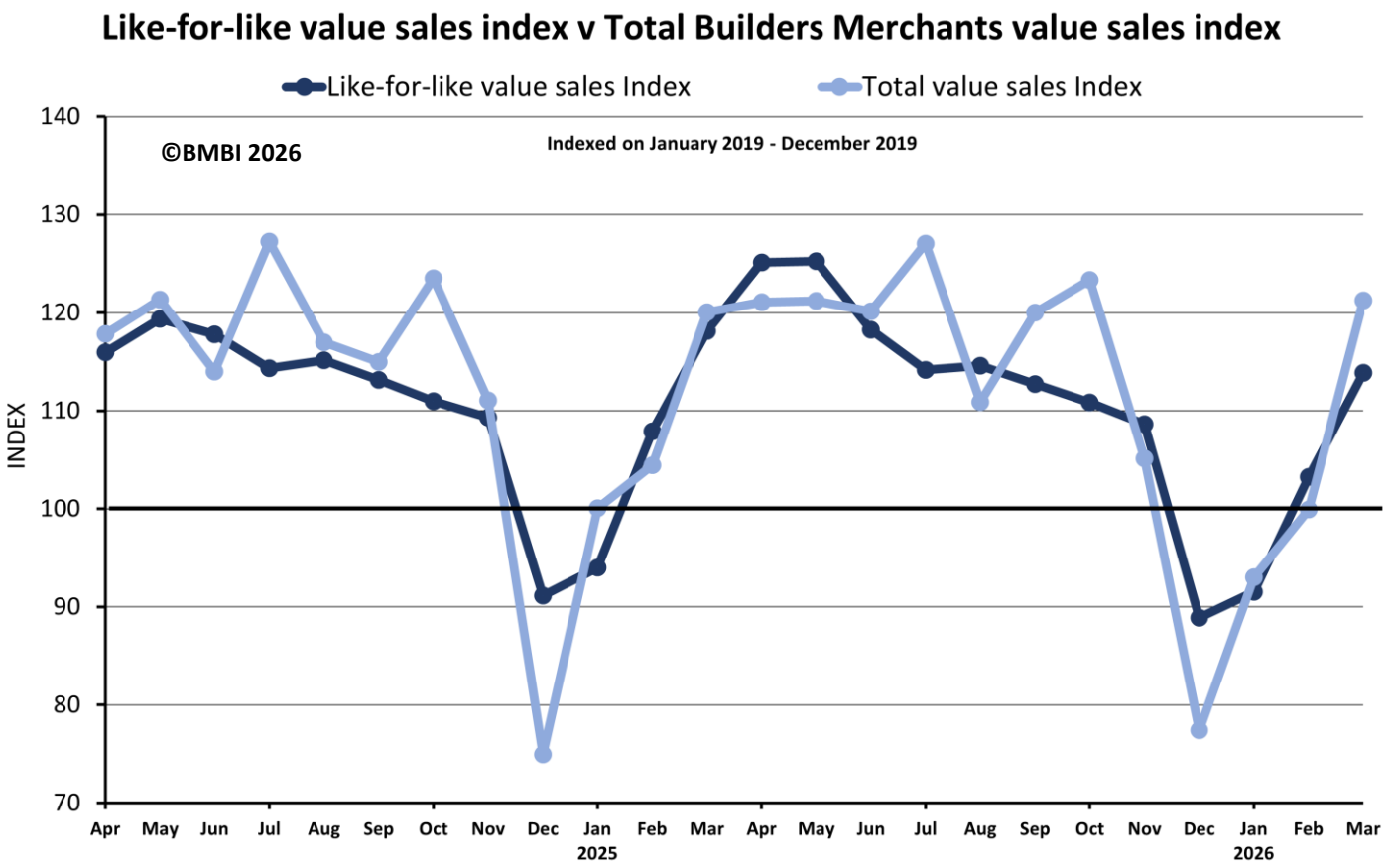
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Monthly: Index

Like-for-like value sales and Total value sales index

22 trading days this month v 21 trading days in the Index base period.
Like-for-like sales are adjusted to remove the effect of trading day differences.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

March's **like-for-like value** sales Index was 113.9.

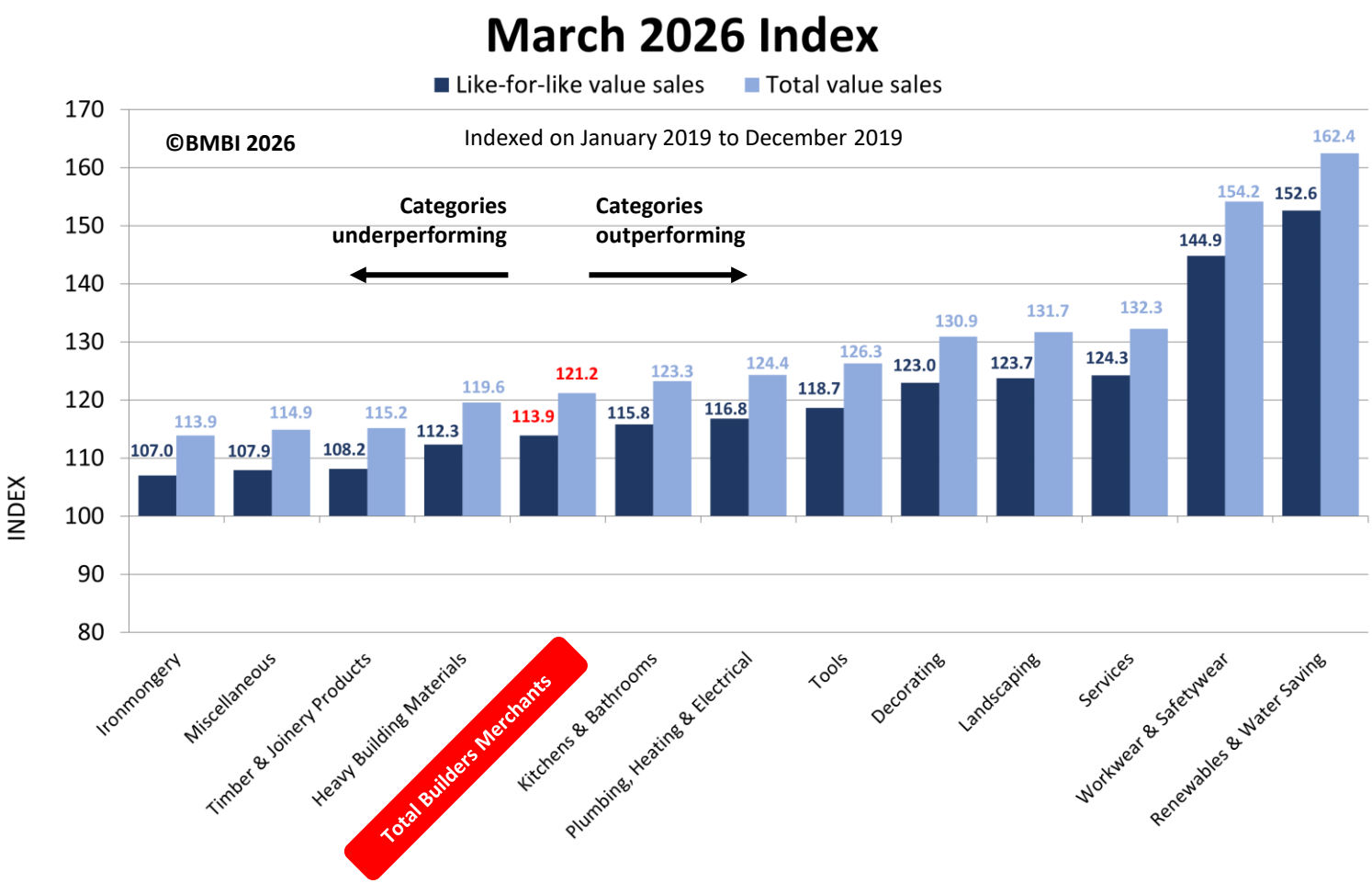
With one more trading day this March 2026 versus the Index base period, the **unadjusted value** sales Index was 121.2.

Latest month: Index by category

Like-for-like value sales and Total value sales index

22 trading days this month v 21 trading days in the Index base period.
Like-for-like sales are adjusted to remove the effect of trading day differences.

Builders Merchant Building Index



NIQ GfK
Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Renewables & Water Saving indexed the highest.

Ironmongery indexed the lowest.

Monthly: Index by Categories

Like-for-like value sales

March 2025* - March 2026

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

Builders Merchant Building Index

		2025	2026											
MONTHLY LIKE-FOR-LIKE VALUE SALES INDEX	Index	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Total Builders Merchants	100	118.1	125.1	125.2	118.2	114.2	114.6	112.7	110.8	108.6	88.9	91.5	103.2	113.9
Timber & Joinery Products	100	108.8	114.9	117.1	111.5	108.8	109.7	109.0	106.8	106.2	87.2	92.4	101.3	108.2
Heavy Building Materials	100	119.7	125.9	125.5	118.8	115.2	114.9	112.8	111.6	106.7	84.9	87.7	100.1	112.3
Decorating	100	126.2	130.2	132.4	123.5	121.1	123.4	120.8	118.6	120.7	102.8	104.6	115.2	123.0
Tools	100	118.7	120.9	119.6	110.8	110.0	112.4	113.9	114.8	117.9	95.8	103.9	115.0	118.7
Workwear & Safetywear	100	133.1	148.0	130.2	128.7	120.5	128.4	135.2	140.1	160.9	131.6	141.9	149.2	144.9
Ironmongery	100	110.8	112.6	112.3	108.9	105.4	103.7	104.3	103.8	105.3	91.1	97.7	103.2	107.0
Landscaping	100	132.3	159.8	161.8	141.9	130.4	129.4	114.8	106.6	91.7	70.0	69.6	88.9	123.7
Plumbing, Heating & Electrical	100	118.5	111.9	109.4	108.2	102.9	102.4	113.4	117.5	127.0	110.7	114.9	119.1	116.8
Renewables & Water Saving	100	139.7	141.9	140.3	132.9	122.2	122.1	124.9	126.7	137.1	118.8	129.3	154.9	152.6
Kitchens & Bathrooms	100	114.6	120.1	116.8	118.0	110.9	114.5	118.1	111.3	123.2	102.9	104.0	119.7	115.8
Miscellaneous	100	106.7	108.2	106.9	98.0	99.5	97.3	103.0	106.7	108.6	94.4	99.6	105.6	107.9
Services	100	121.2	126.3	124.7	118.0	117.4	121.5	115.7	115.5	117.7	112.8	100.3	115.1	124.3

*Click the web link below to see the complete series of indices from March 2024.

NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Monthly: Index by Categories

Total (unadjusted) sales

March 2025* - March 2026

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

Builders Merchant Building Index

		2025	2026											
MONTHLY VALUE SALES INDEX	Index	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
Total Builders Merchants	100	120.1	121.1	121.2	120.2	127.1	110.9	120.0	123.3	105.1	77.4	93.0	99.9	121.2
Timber & Joinery Products	100	110.5	111.2	113.3	113.3	121.0	106.2	116.0	118.9	102.8	76.0	93.9	98.0	115.2
Heavy Building Materials	100	121.6	121.8	121.5	120.7	128.2	111.2	120.1	124.2	103.2	74.0	89.1	96.9	119.6
Decorating	100	128.3	126.0	128.1	125.5	134.7	119.5	128.6	132.0	116.8	89.5	106.3	111.4	130.9
Tools	100	120.6	117.0	115.7	112.6	122.4	108.8	121.3	127.7	114.1	83.4	105.6	111.3	126.3
Workwear & Safetywear	100	135.2	143.2	126.0	130.8	134.1	124.2	143.9	155.9	155.7	114.6	144.2	144.4	154.2
Ironmongery	100	112.5	109.0	108.6	110.6	117.3	100.3	111.1	115.5	101.9	79.4	99.3	99.9	113.9
Landscaping	100	134.4	154.7	156.6	144.2	145.1	125.3	122.2	118.6	88.7	61.0	70.7	86.0	131.7
Plumbing, Heating & Electrical	100	120.4	108.3	105.9	110.0	114.5	99.1	120.8	130.8	122.9	96.4	116.8	115.3	124.4
Renewables & Water Saving	100	141.9	137.3	135.7	135.1	136.0	118.2	132.9	141.0	132.7	103.4	131.4	149.9	162.4
Kitchens & Bathrooms	100	116.4	116.2	113.0	119.9	123.4	110.9	125.7	123.9	119.2	89.6	105.7	115.8	123.3
Miscellaneous	100	108.4	104.7	103.5	99.6	110.8	94.1	109.7	118.8	105.1	82.2	101.2	102.2	114.9
Services	100	123.2	122.3	120.7	119.9	130.7	117.6	123.2	128.5	113.9	98.2	101.9	111.4	132.3

*Click the web link below to see the complete series of indices from March 2024.

NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

Trading Days

Builders Merchant Building Index

Monthly

Index: 20.7

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
2026											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	22									

Quarterly

Index: 62

2024			
Q1	Q2	Q3	Q4
63	62	65	61
2025			
Q1	Q2	Q3	Q4
63	61	65	61
2026			
Q1	Q2	Q3	Q4
63			

Half Year

2024	
H1	H2
125	126
2025	
H1	H2
124	126
2026	
H1	H2

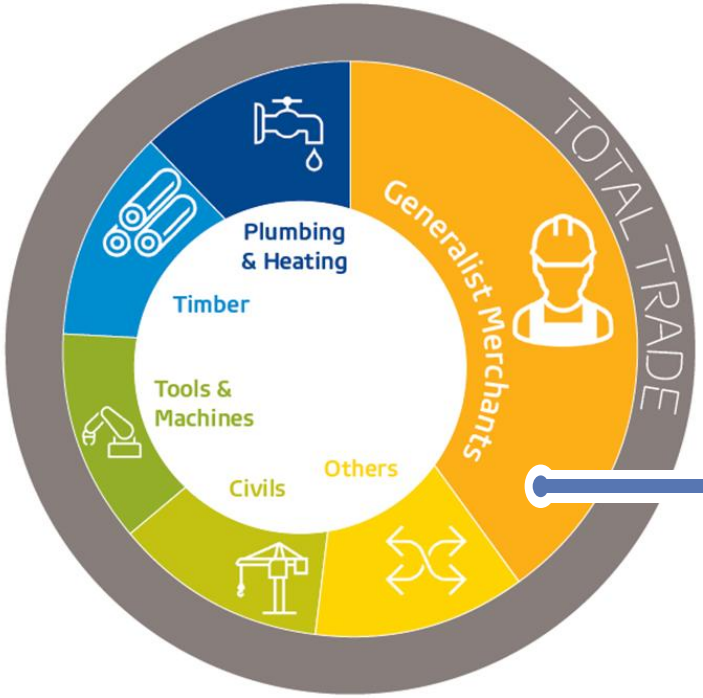
Full Year

2024
251
2025
250
2026

NIQ GfK

Source: GfK's Builders Merchants Total Category Report: January 2019 to March 2026

GfK's Definition of Builders Merchant Panel



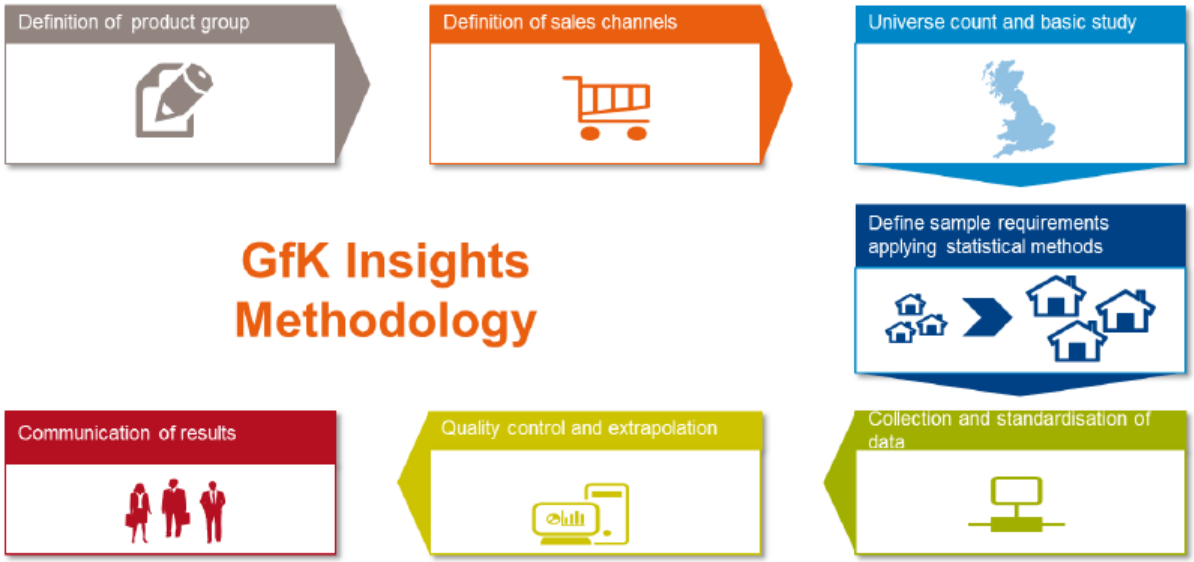
Generalist Builders Merchants definition:

- 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 Insights Methodology



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

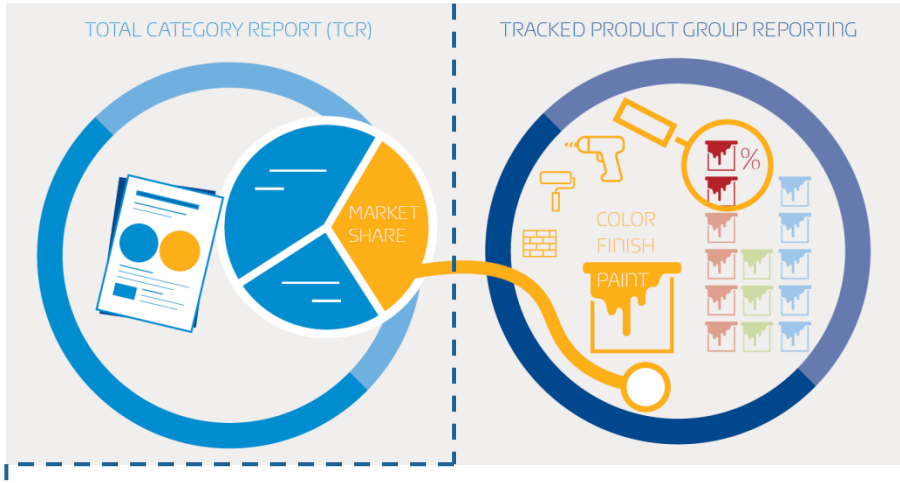
Plumbing Heating & Electrical
Plumbing Equipment
Boilers Tanks & Accessories
Heating Equipment/Water Heaters/Temperature Control/Air Treatment
Radiators And Accessories
Electrical Equipment
Lighting And Light Bulbs

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



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)

Macro factors impacting Merchants

Bank interest rates

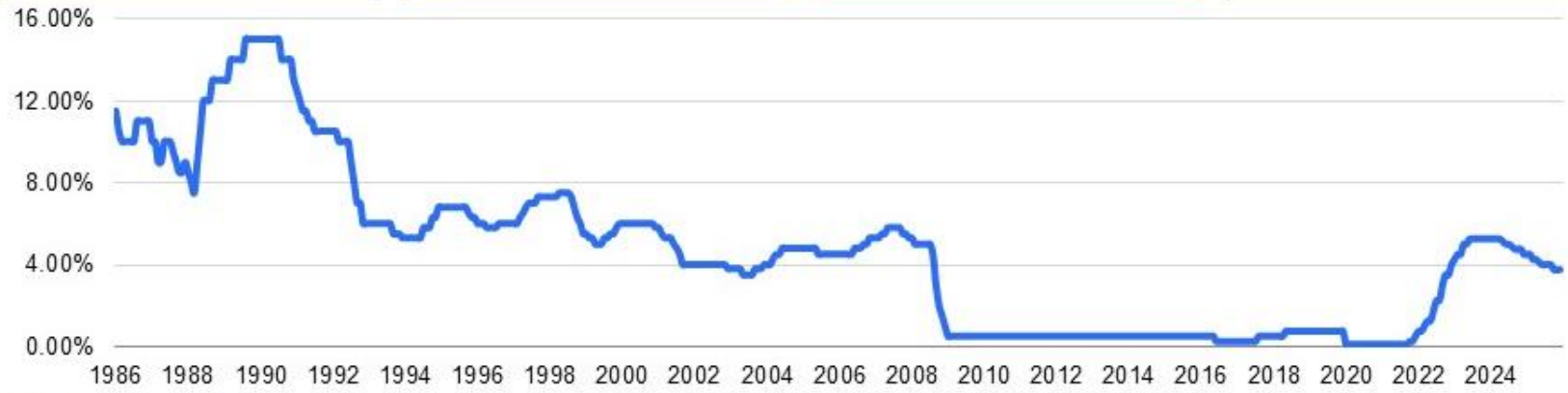
Set monthly by the MPC (Monetary Policy Committee)

- The base rate of interest is one of the tools used by the Bank of England to target price stability. Since 1997, when the Bank's Monetary Policy Committee gained autonomy, the rate has been between 7.5% and 0.25%.

- The economic crisis caused the Bank to drop rates to 0.5%, as the inflation pressure was considered less important than the stability of the economy.
- The further reduction in August 2016 was designed to further promote growth and achieve the Bank's 2% inflation target.

- At its meeting on 4 August 2016, the Bank of England reduced the base rate from the previous historic low of 0.5% to a record-breaking 0.25%.

- At its meeting ending on 18 March 2026, the Monetary Policy Committee (MPC) voted unanimously to maintain Bank Rate at 3.75%.



powered by GfK intelligence

Source: Bank of England

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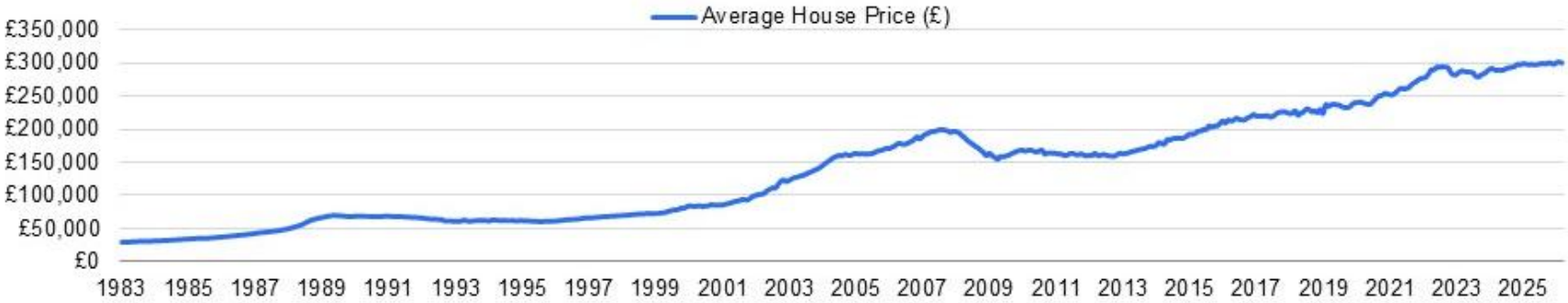
Macro factors impacting Merchants

Standardised average house prices

Average Price (year-end)		
2019	£234,478	+4%
2020	£244,112	+4%
2021	£262,454	+8%
2022	£287,520	+10%
2023	£284,221	-1%
2024	£291,977	+3%
2025	£298,198	+2%

- House prices fell -0.5% in March, following the modest +0.3% increase seen in February. The pace of annual growth has also eased, slowing to +0.8% from +1.2% the previous month, suggesting the market has lost some momentum as spring begins. The recent slowdown in the housing market reflects the wide uncertainty regarding the conflict in the Middle East.

- At the end of March 2026, the average house price in the UK decreased to £299,677 from £301,151 in February 2026.
- House prices in March 2026 were 0.8% higher than in the same month a year earlier.



powered by GfK intelligence

Source: Halifax House Price Index

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Macro factors impacting Merchants

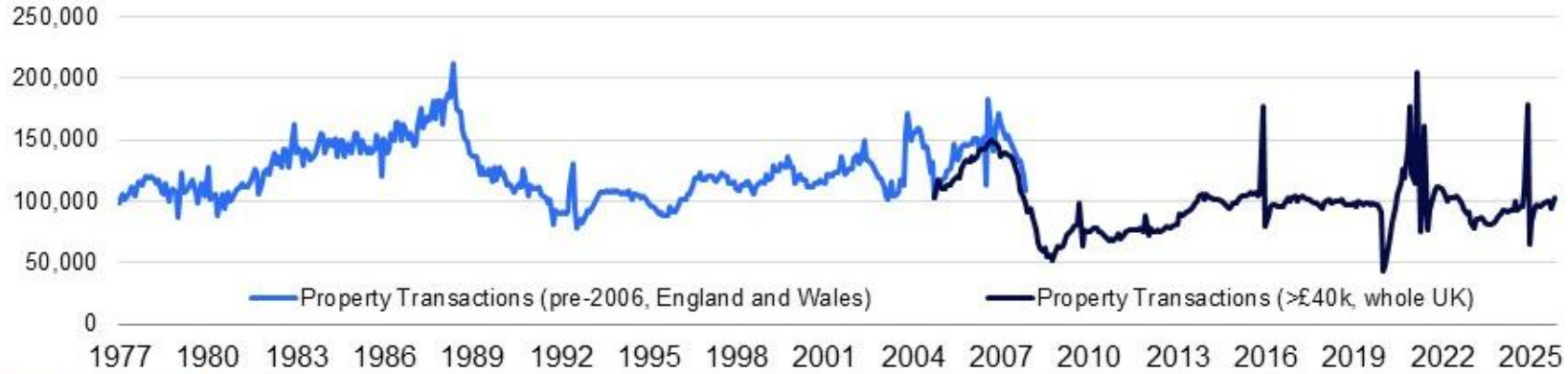
Property transactions

Monthly transactions, residential, seasonally adjusted

Annual total	
2021	1,483,100
2022	1,264,740
2023	1,023,240
2024	1,094,620
2025	1,216,260

- Stamp duty was altered significantly on 1 December 2003.
- In April 2016, there were major changes to the amount of Stamp Duty property investors will have to pay when purchasing a second home or a buy to let property.

- The seasonally adjusted UK property transaction count in February 2026 was 102,410 residential and 10,150 non-residential transactions.
- The seasonally adjusted count of residential property transactions in February 2026 was 6% lower than February 2025 and 6% higher than January 2026.



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Source: HM Revenue & Customs

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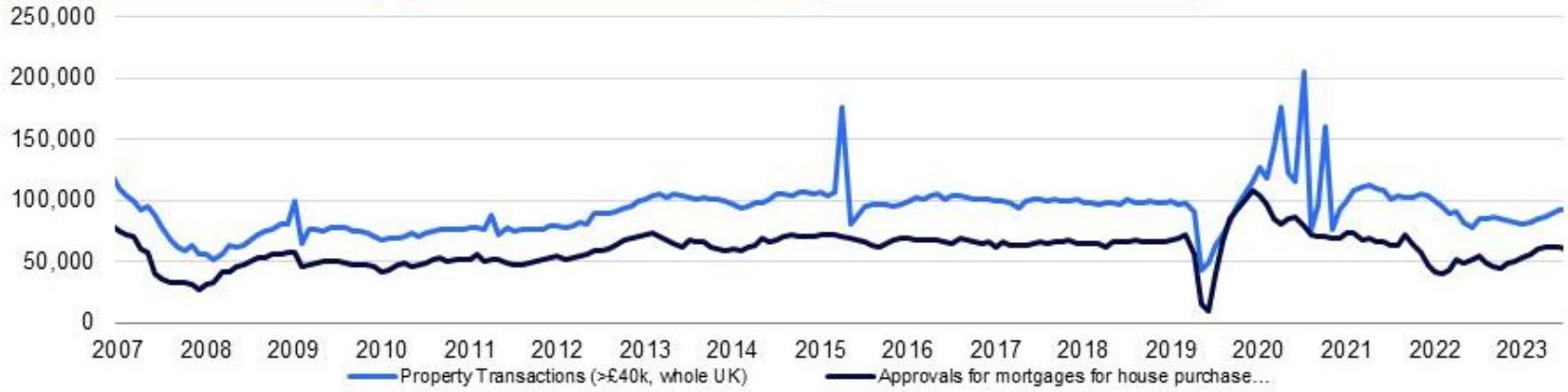
Macro factors impacting Merchants

Mortgage approvals and property transactions

Monthly residential transactions and mortgage approvals (seasonally adjusted)

- Mortgage approvals for house purchase refers to the firm offers of lenders to advance credit secured on specific dwellings to their customers.
- Following year-on-year decreases in April and May 2020 of around 50% caused by the coronavirus pandemic, non-seasonally adjusted UK residential transactions gradually increased, before peaking in March, June and September 2021.
- The number of loan approvals for house purchase in the United Kingdom rose to 62,584 in February 2026 - this represents a 3.9% increase from January 2026.



NIC powered by GfK intelligence

Source: HM Revenue & Customs

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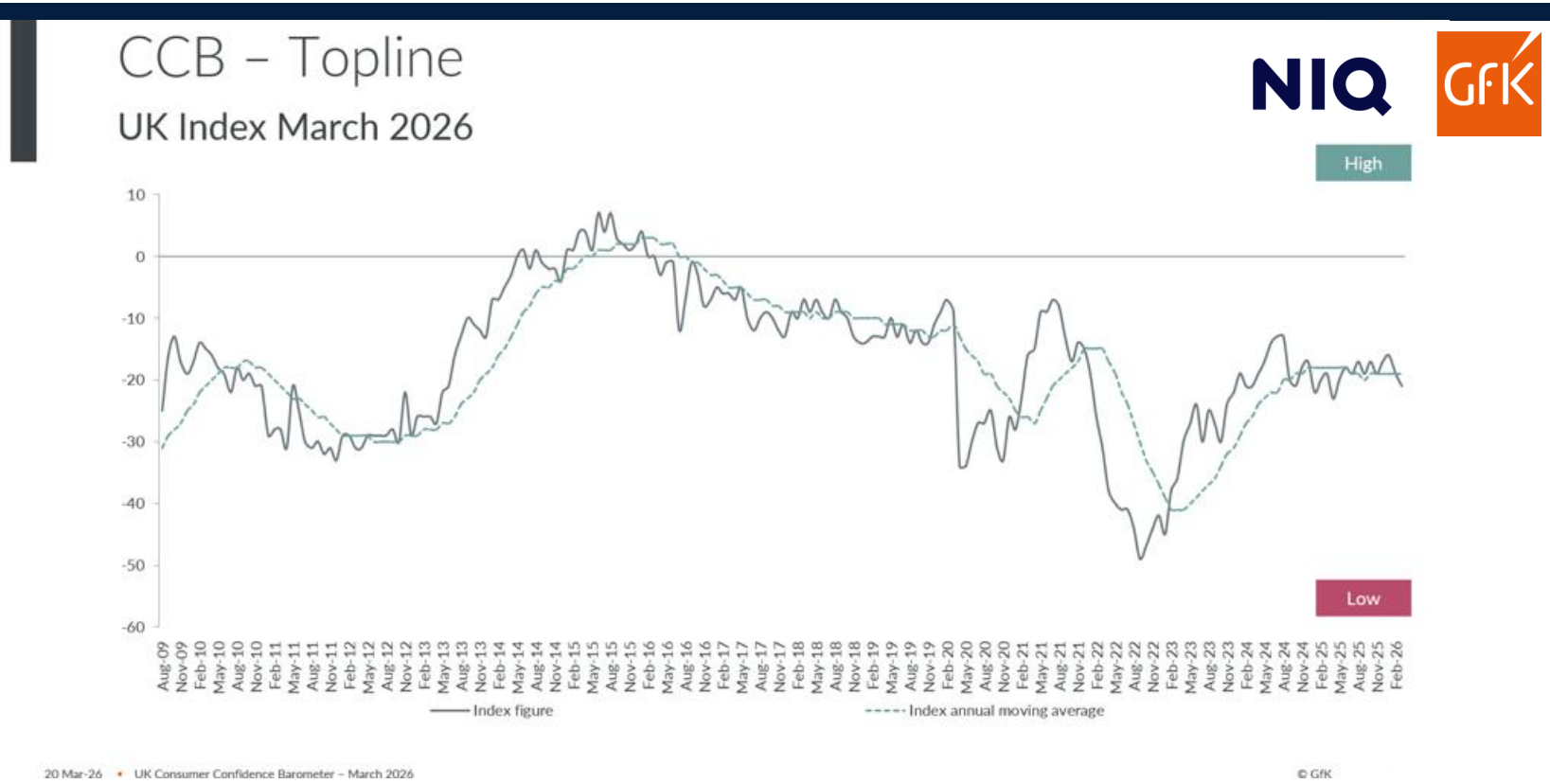
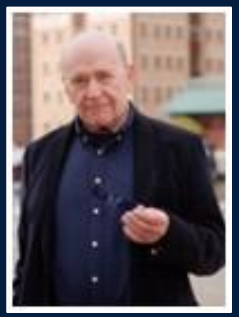
Macro factors impacting Merchants



Neil Bellamy, Consumer Insights Director, NiQ GfK said: A ripple of fear is spreading as is evident from the six-point fall in perceptions of the General Economic Situation over the next 12 months, and also in the four-point drop in the Major Purchase Index. People simply do not feel the economy is robust enough to ride out the knock-on effects from the Middle East conflict. Moreover, the decline in purchasing intentions, coupled with a six-point rise in the Savings Index, indicates people are holding on to their money. With growing concerns over further sharp price rises in the coming months; this ripple of fear we are seeing in the March data has the danger of turning into a flood.

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).

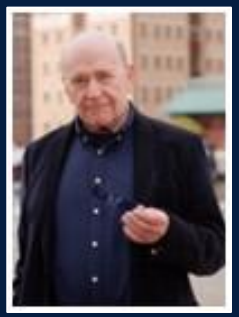
The BMBI and PHMI summaries and reports have always included this measure of value sales and will continue to do so.

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.

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.

Excellence in building materials supply

BMF (Builders Merchant Federation) Forecast Report & BMF Sales Indicators

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

For further information

Builders Merchant Building Index

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