

Excellence in building
materials supply

Builders Merchant Building Index



Monthly report for May 2026

(Published 28 July 2026)

Highlights - Like-for-like value sales

(adjusted to remove the effect of trading days)

BMBI: May 2026

Like-for-like value sales

(adjusted to remove the effect of trading days)

Builders Merchant
Building Index 

www.bmbi.co.uk



Latest month
May 2026
v
Last year
May 2025

-0.1%

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

-1.6%

Latest 12 months
June 2025 - May 2026
v
Previous 12 months
June 2024 - May 2025

-1.2%

Year-to-date
Jan - May 2026
v
Last year
Jan - May 2025

-2.1%

“Total Builders Merchants **like-for-like value sales** were -0.1% lower in May 2026 compared with the same month last year. **Like-for-like volume** sales were down -5.8%.”

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Highlights - Total (unadjusted) value sales

BMBI: May 2026 Total (unadjusted) value sales

Latest month
May 2026
v
Last year
May 2025

-5.1%

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

-1.6%

Latest 12 months
June 2025 - May 2026
v
Previous 12 months
June 2024 - May 2025

-1.2%

Year-to-date
Jan - May 2026
v
Last year
Jan - May 2025

-3.1%

With one less trading day in the latest month, **unadjusted value** sales were -5.1% lower in May 2026 than in May 2025. **Volume** sales were down -10.5% but **prices increased** +6.1%.

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Contents

Click links below to visit pages

Click links to visit pages:	Page
Highlights - Like-for-like value sales	2
Highlights - Total value sales	3
Contents	4
Introduction to Builders Merchant Building Index	5
BMBI Experts	6 - 7
Coverage and data audits	8
Overview	9-11
Monthly data:	
Latest month v last year (value, volume & price) by category	12
Latest 12 months v previous 12 months (value, volume & price) by category	13
Year to date v last year (value, volume & price) by category	14
Latest month v last year sales chart, by category	15
Latest month v last year sales chart (volume) by category	16
Latest month v previous month sales chart, by category	17
Other periods:	
Latest 3 months v last year sales chart, by category	18
Latest 3 months v previous 3 months sales chart, by category	19
Latest 12 months v previous 12 months sales chart, by category	20
Latest 12 months v previous 12 months sales chart (volume) by category	21
Year-to-date v last year	22
Monthly Category Charts:	
Timber & Joinery Products	23

Click links to visit pages:	Page
Heavy Building Materials	24
Decorating	25
Tools	26
Workwear & Safetywear	27
Ironmongery	28
Landscaping	29
Plumbing, Heating & Electrical	30
Renewables & Water Saving	31
Kitchens & Bathrooms	32
Miscellaneous	33
Services	34
Monthly indices:	
Monthly BMBI Index chart, trends	35
Latest month BMBI Index chart, by category	36
Monthly BMBI Index table, by category - Like-for-like value sales	37
Monthly BMBI Index table, by category - Total value sales	38
Additional content:	
Trading days	39
Methodology	40 - 42
BMF Forecast Report	43 - 44
BMF Sales Indicators	45
Brands behind BMBI	46
Contacts	47

Introduction:

Builders Merchant Building Index



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

The monthly series tracks what is happening in the market month by month and includes an in-depth review every quarter. BMBI Index data is calculated on the 12-month base period January 2019 to December 2019.

Executive Summary

Short of time and just want to read the headlines? Download an Executive Summary that provides a snapshot of value sales and trends from Britain's Builders' Merchants for May [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 on pages 6 and 7 of this report or read their latest comments [here](#).**

BMBI - the best proxy there is for RMI

One of the aims of BMBI is to reach across and beyond construction. It's syndicated monthly to a growing number of trade magazines in different sectors. Outside the industry, economists, banks, consultancies, investment bodies, advisors and accountants refer to it. BMBI is featured alongside the BoE and Office for National Statistics (ONS) data in the Government **Department for Business & Trade's Monthly Construction Update**. **Download the latest update [here](#).**



More data available

This BMBI report provides valuable top-level indices but there's considerably more data available. NiQ GfK insights go much deeper and include sales value data. NiQ GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you. You can view previous reports [here](#).

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

The Experts

Speaking for their markets - 1

The Builders Merchant Building Index (BMBI) includes a panel of industry Experts. In each quarterly report they comment on the market, with a particular focus on the story behind the trends. Experts are leading brands, or brands aspiring to become leaders, who are the voice of their markets.

The Q1 2026 report, which includes commentary from our experts is available [here](#)

Meet the Builders Merchant Building Index Experts here and on the next page:

Expert for Drylining Systems:



Gordon Parnell
Sales Director British
Gypsum

[Read latest comment: Q1 2026 Report](#)

Expert for Natural Stone & Porcelain Paving:



Krystal Williams
Managing Director
Pavestone UK Ltd

[Read latest Comment: Q1 2026 Report](#)

Expert for Roof Windows:



Jim Blanthorne
Managing Director
Keylite Roof Windows

[Read latest Comment: Q1 2026 Report](#)

Expert for Steel Lintels:



Derrick McFarland
Managing Director
Keystone Lintels

[Read latest Comment: Q1 2026 Report](#)

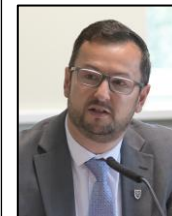
Expert for Mineral Wool Insulation:



Neil Hargreaves
Managing Director
Knauf Insulation

[Read latest Comment: Q1 2026 Report](#)

Expert for Cement & Aggregates:



Andrew Simpson
Packed Products Director
Heidelberg Materials

[Read latest Comment: Q1 2026 Report](#)

The Experts

Speaking for their markets - 2

Expert for Paint:



Jamie Barber
UK&I Sales Director Trade
Dulux Trade

[Read latest Comment: Q1 2026 Report](#)

Expert for Website & Product Data Management Solutions:



Chris Aitken
Spruce Sales Consultant
ECi Software Solutions

[Read latest Comment: Q1 2026 Report](#)

Expert for Plumbing & Drainage:



Kevin Bohea
Divisional Director
Brett Martin

[Read latest Comment: Q1 2026 Report](#)

Expert for Plastic Plumbing for Hot and Cold Water Systems:



Matt Williams
Managing Director
Polypipe Building Products

[Read latest Comment: Q1 2026 Report](#)

Expert for Softwoods and Engineered Wood:



James Davenport
Managing Director
Metsä Wood UK

[Read latest Comment: Q1 2026 Report](#)

Expert for Heating and Hot Water Solutions:



Paul Haynes
Product, Solutions & Marketing Director
Baxi

[Read latest Comment: Q1 2026 Report](#)

Coverage and data audits

NIQ



As part of its ongoing drive to ensure the most accurate and relevant understanding of market coverage GfK conducts universe studies every few years.

These studies aim to understand the number of retailers / merchants and the branches they have in a defined universe - in this case the mainland Great Britain Builders Merchants channel.

The previous iteration of the BMBI used a universe study conducted in 2019, with coverage then estimated at 82% was revised up to 92% in the October 2023 report with the introduction of CMO, Huws Gray and JT Dove.

GfK has since completed its latest universe study for the channel and now estimates coverage to sit at 88%.

For any queries around this, please reach out to Emile van der Ryst at emile.vanderryst@nielseniq.com.

Based on its latest universe study for the builders' merchant channel, NiQ GfK estimates coverage is 88%.

Overview - 1 - Like-for-like

May 2026 like-for-like value sales were -0.1% lower compared with May 2025

Like-for-like value sales (adjusted to remove the effect of trading days)

- Total Builders Merchants **like-for-like value** sales were -0.1% lower in May 2026 compared with the same month last year.

Like-for-like volume sales (adjusted to remove the effect of trading days)

- Total Builders Merchants **like-for-like volume** sales were down -5.8% but **prices** were up +6.1%.

Latest 3 months v previous year: March 2026 - May 2026 v March 2025 - May 2025

- Total Builders Merchants **like-for-like value** sales were -1.6% lower in the latest 3 months compared to the previous year.
- Total Builders Merchants **like-for-like volume** sales were down -5.9% but **prices** were up +4.5%.

Latest 12 months v previous 12 months: June 2025 - May 2026 v June 2024 - May 2025

- Total Builders Merchants **like-for-like value** sales in the latest 12 months, June 2025 to May 2026 were -1.2% lower compared to the same period a year earlier, June 2024 to May 2025.
- Total Builders Merchants **like-for-like volume** sales were down -3.2% and **prices** were up +2.1%.

Year-to-date: January - May 2026 v January - May 2025

- Total Builders Merchants **like-for-like value** sales in the five months, January to May 2026 were -2.1% lower compared to the same period a year earlier, January to May 2025.
- Total Builders Merchants **like-for-like volume** sales were down -6.8% but **prices** were up +5.0%.

Year-to-date

Total Builders Merchants **like-for-like value** sales in the 5 months January to May were -2.1% down v the same period a year earlier, January to May 2025.

Overview continues on the next page...

Overview - 2 - Total (unadjusted)

... continued from the previous page:

May 2026 v May 2025

- With one less trading day in the latest month, **unadjusted value** sales were -5.1% lower in May 2026 than in May 2025. By **value**, two of the twelve categories sold more: Workwear & Safetywear (+7.5%) and Services (+3.3%). Renewables & Water Saving (-10.7%), Decorating (-6.8%), Ironmongery (-6.7%) and Heavy Building Materials (-6.4%) saw the largest decreases.
- With one less trading day, **unadjusted volume** sales were -10.5% lower in May 2026 than in May 2025 but **prices** were up +6.1%. By **volume**, four of the twelve categories sold more. Workwear & Safetywear (+11.0%) and Miscellaneous (+5.3%) were the top performing categories. Timber & Joinery Products (-6.8%) fell less than Total Builders Merchants, while Heavy Building Materials was down -13.5%.

Latest three months v last year: March 2026 - May 2026 v March 2025 - May 2025

- With no difference in trading days, **unadjusted value** sales were -1.6% lower in the latest 3 months compared to last year. By **value**, five of the twelve categories sold more, led by Workwear & Safetywear (+5.8%) and Services (+5.8%). Timber & Joinery Products (+0.2%) performed better than Total Builders Merchants, while Heavy Building Materials (-3.3%) was the weakest category.
- With no difference in trading days, **unadjusted volume** sales were -5.9% lower in the latest 3 months compared to last year. Prices increased +4.5%. By **volume**, four of the twelve categories sold more: Workwear & Safetywear (+18.2%) and Miscellaneous (+13.3%) performed best. Timber & Joinery Products (-1.5%) declined less than Total Builders Merchants, while Heavy Building Materials fell -8.2%.

May 2026 v May 2025

With one less trading day, **unadjusted value** sales were -5.1% lower in May than in May 2025.

Overview continues on the next page...

Overview - 3 - Total (unadjusted)

... continued from the previous page:

Latest 12 months v previous 12 months: June 2025 - May 2026 v June 2024 - May 2025

- With no difference in trading days in the latest period **unadjusted value** sales were -1.2% lower in the latest 12 months versus the same period a year earlier. By **value**, seven of the twelve categories sold more, led by: Renewables & Water Saving (+10.4%). Timber & Joinery Products grew sales by +1.4%, while Heavy Building Materials declined -3.4%, and was the weakest category.
- With no difference in trading days, **unadjusted volume** sales were -3.2% lower in the latest 12 months versus the same period a year earlier. **Prices** were up +2.1%. By **volume**, six of the twelve categories sold more, led by: Miscellaneous (+10.7%) and Workwear & Safetywear (+9.6%). Timber & Joinery Products rose +0.6%, while Heavy Building Materials fell -5.2%.

Year-to-date: January - May 2026 v January - May 2025

- With one less trading day in the latest period **unadjusted value** sales were -3.1% lower in the five months, January to May 2026 versus the same period a year earlier. By **value**, three of the twelve categories sold more, led by: Renewables & Water Saving (+9.6%). Timber & Joinery Products (-0.2%) declined less than Total Builders Merchants. Heavy Building Materials fell -5.6%, and it was the weakest category.
- With one less trading day, **unadjusted volume** sales were -7.7% lower in the five months, January to May 2026 than the same period a year earlier. **Prices** were up +5.0%. By **volume**, four of the twelve categories sold more: Workwear & Safetywear (+15.3%) and Miscellaneous (+13.2%) performed best. Timber & Joinery Products (-1.8%) fell less than Total Builders Merchants. Heavy Building Materials (-10.7%) was the second weakest category after Renewables & Water Saving (-16.5%) .

Year-to-date

With one less trading day in the latest period **unadjusted value** sales were -3.1% lower in the 5 months, January to May versus the same 5 months a year earlier.

Latest month v last year

Total value sales, total volume sales & price % change



May 2026 v May 2025



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

With one less trading day in the latest month, **unadjusted value** sales were down -5.1% May 2026 v May 2025.

Unadjusted volume sales were down -10.5% but **prices** were up +6.1%.

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	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (Unit price % change)
Workwear & Safetywear	+7.5%	+11.0%	-3.2%
Services	+3.3%	+3.8%	-0.5%
Miscellaneous	-2.5%	+5.3%	-7.5%
Landscaping	-2.8%	-2.8%	+0.1%
Plumbing, Heating & Electrical	-4.5%	-9.8%	+5.9%
Timber & Joinery Products	-4.7%	-6.8%	+2.3%
Kitchens & Bathrooms	-4.9%	+2.9%	-7.6%
Total Builders Merchants	-5.1%	-10.5%	+6.1%
Tools	-5.5%	-5.5%	0.0%
Heavy Building Materials	-6.4%	-13.5%	+8.1%
Ironmongery	-6.7%	-11.8%	+5.7%
Decorating	-6.8%	-10.8%	+4.6%
Renewables & Water Saving	-10.7%	-25.5%	+19.9%

Latest 12 months v previous 12 months

Total value sales, total volume sales & price % change

Builders Merchant
Building Index



June 2025 – May 2026 v June 2024 – May 2025

©BMBI 2026	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (Unit price % change)
Renewables & Water Saving	+10.4%	-7.7%	+19.6%
Services	+3.3%	+1.2%	+2.1%
Workwear & Safetywear	+2.8%	+9.6%	-6.2%
Miscellaneous	+2.0%	+10.7%	-7.8%
Kitchens & Bathrooms	+1.7%	+2.0%	-0.3%
Plumbing, Heating & Electrical	+1.6%	-1.5%	+3.2%
Timber & Joinery Products	+1.4%	+0.6%	+0.8%
Tools	-0.1%	-2.0%	+1.9%
Ironmongery	-0.7%	+1.7%	+2.3%
Total Builders Merchants	-1.2%	-3.2%	+2.1%
Landscaping	-1.5%	-0.4%	-1.2%
Decorating	-2.2%	-2.9%	+0.7%
Heavy Building Materials	-3.4%	-5.2%	+1.9%

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

With no difference in trading days **unadjusted value** sales were -1.2% lower in the latest 12 months v the same period a year earlier

Unadjusted volume sales were -3.2% lower. **Prices** were up +2.1%.

Year to date

Total value sales, total volume sales & price % change



January 2026 – May 2026 v January 2025 – May 2025



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

Total Builders
Merchants
unadjusted value
sales were down
-3.1% Jan - May
2026 v Jan
– May 2025

**Unadjusted
volume** sales
were down -7.7%
but prices were
up +5.0%.

©BMBI 2026	Total value sales (GBP % change)		Total volume sales (Units % change)		Price (Unit price % change)
Renewables & Water Saving	+9.6%	-16.5%			+31.2%
Workwear & Safetywear	+5.1%		+15.3%	-8.8%	
Services	+4.0%		+1.3%		+2.7%
Kitchens & Bathrooms	-0.2%	-1.8%			+1.6%
Timber & Joinery Products	-0.2%		+1.5%	-1.7%	
Miscellaneous	-0.5%	-5.1%			+4.8%
Plumbing, Heating & Electrical	-0.5%		+13.2%	-12.1%	
Tools	-0.7%	-2.9%			+2.2%
Decorating	-2.1%	-3.3%			+1.3%
Ironmongery	-2.8%	-0.9%		-1.9%	
Total Builders Merchants	-3.1%	-7.7%			+5.0%
Landscaping	-4.8%	-4.9%			+0.1%
Heavy Building Materials	-5.6%	-10.7%			+5.7%

Latest month v last year

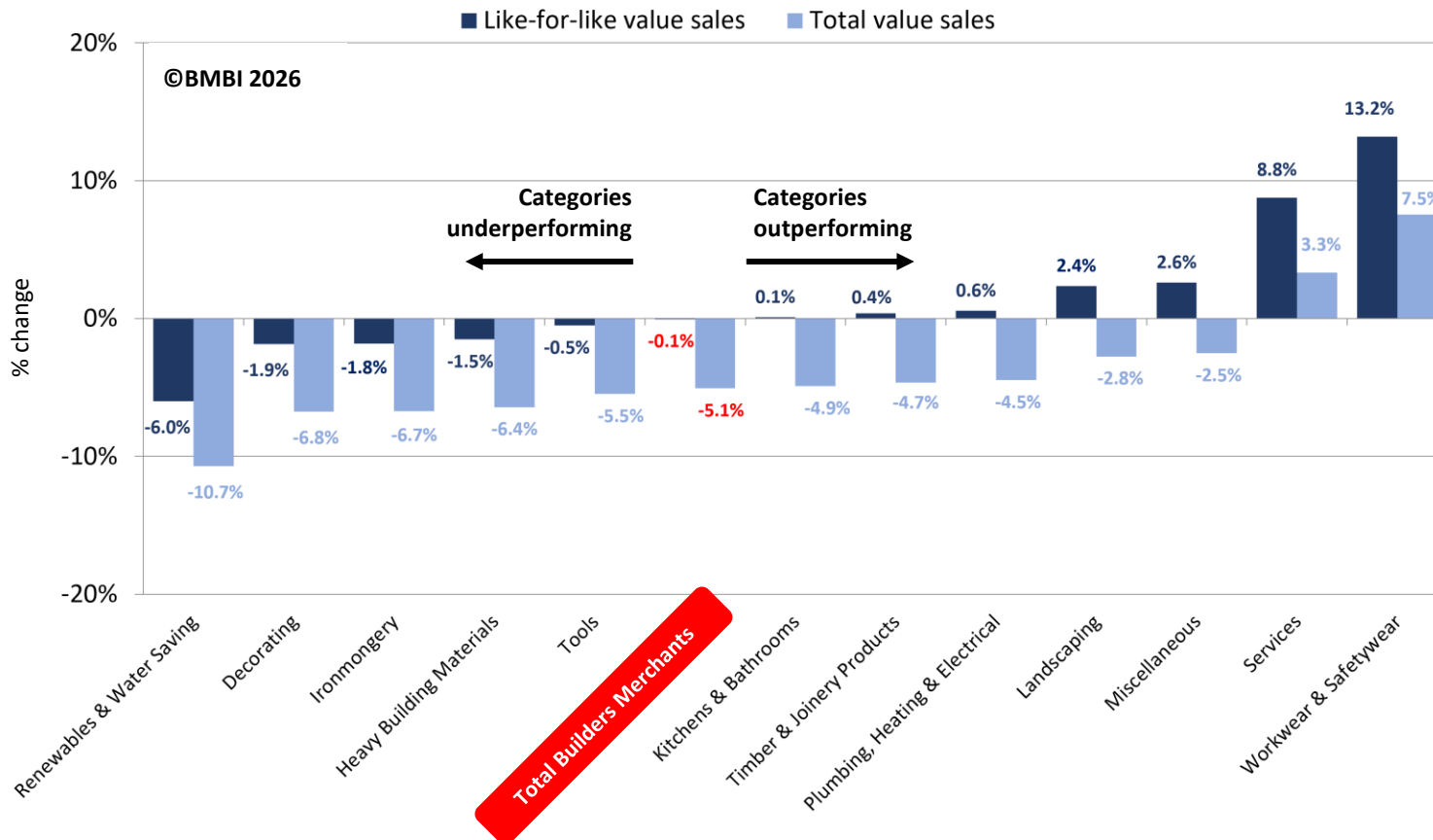
Like-for-like value sales and Total value sales % change

19 trading days this month v 20 trading days last year.

Like-for-like sales are adjusted to remove the effect of trading day differences.



May 2026 v May 2025



NIQ GfK

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

Like-for-like value sales were -0.1% lower in May 2026 v same month last year.

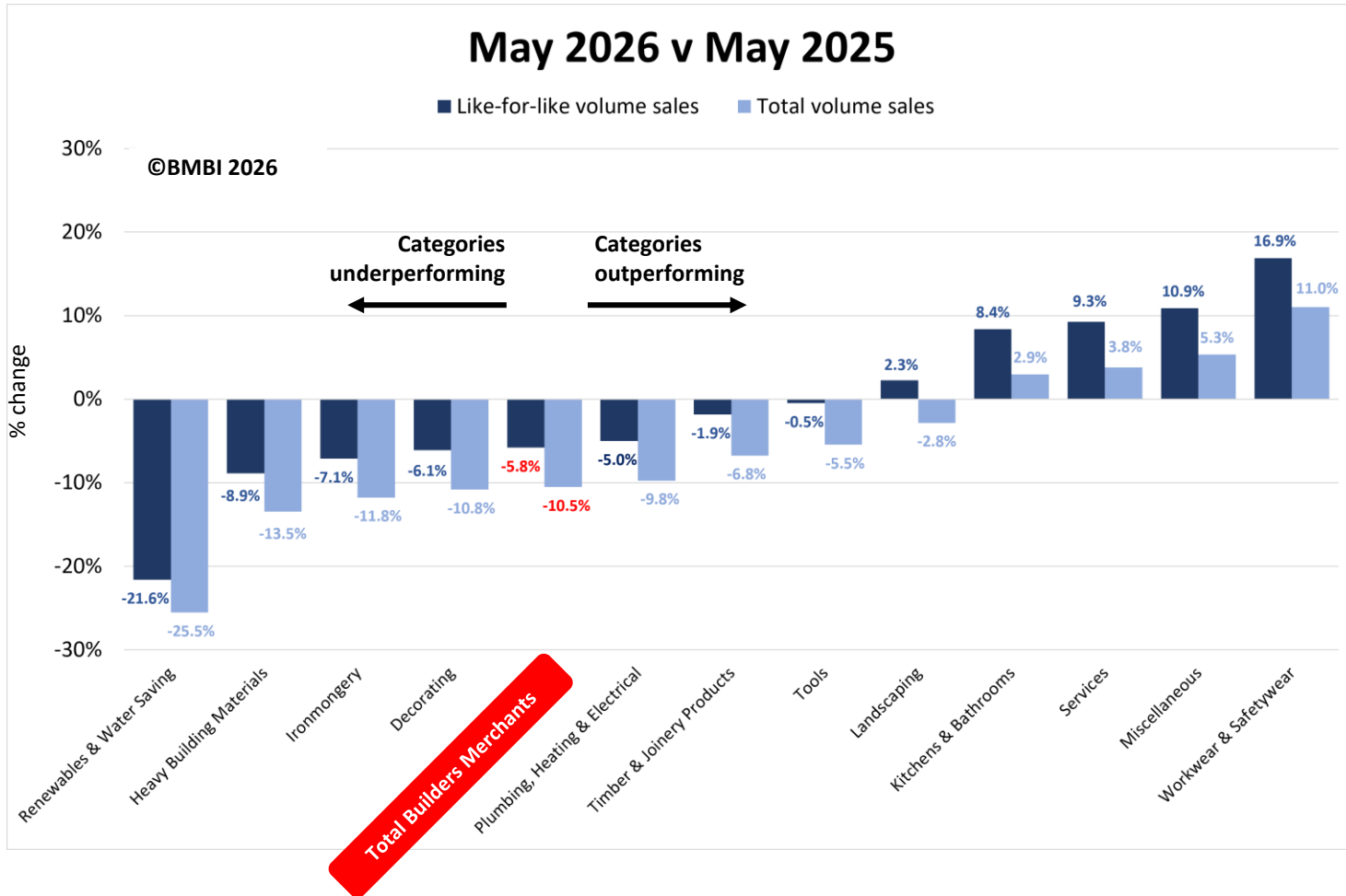
Like-for-like volume sales were down -5.8%.
Prices were up +6.1%.

Latest month v last year

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

19 trading days this month v 20 trading days last year.

Like-for-like sales are adjusted to remove the effect of trading day differences.



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

Workwear &
Safetywear was the
standout category
- up +16.9% like-
for-like Volume
sales.

Latest month v previous month

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

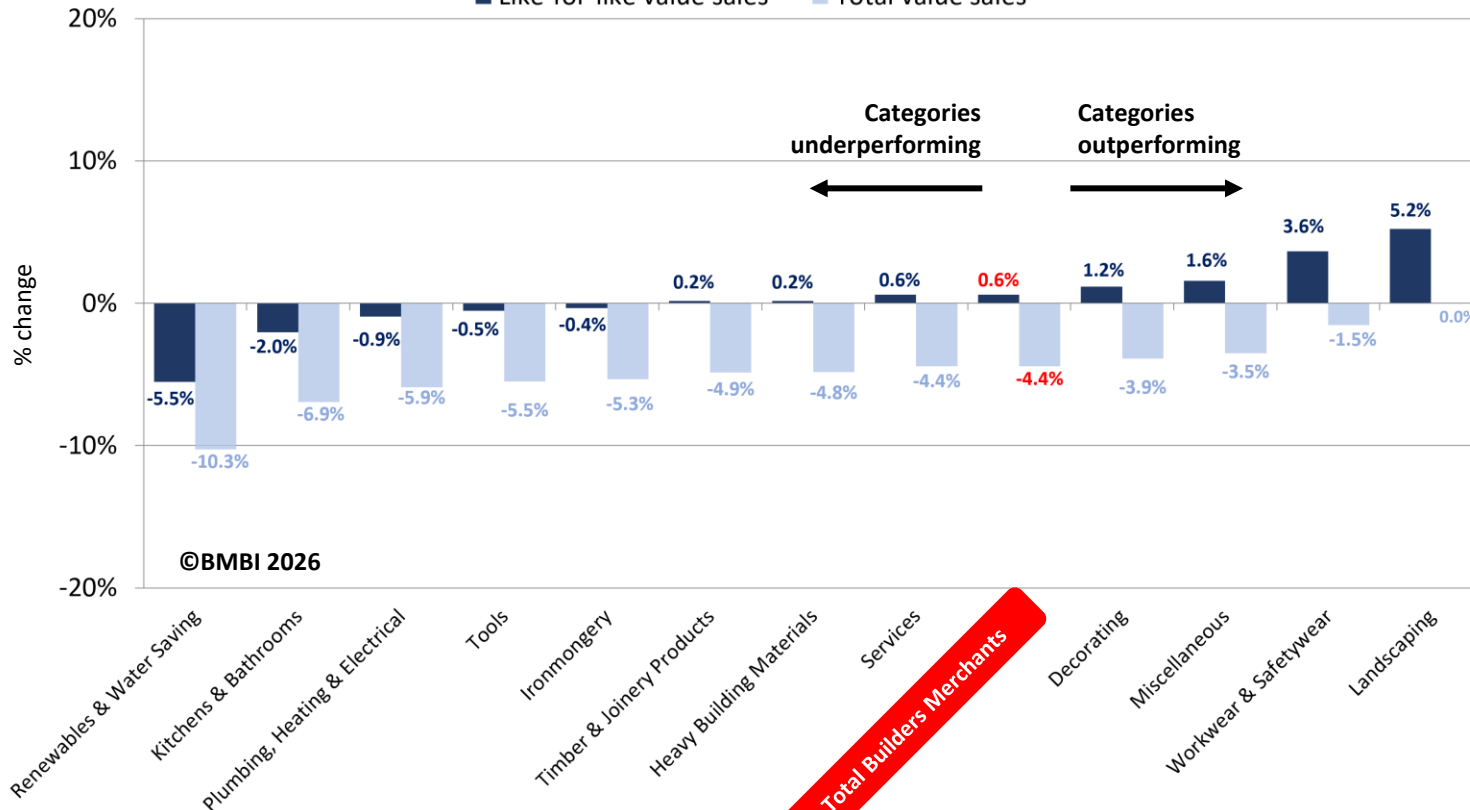
19 trading days this month v 20 trading days last month.

Like-for-like sales are adjusted to remove the effect of trading day differences.



May 2026 v April 2026

■ Like-for-like value sales ■ Total value sales



NIQ GfK

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

Like-for-like value sales were up +0.6% in May 2026 v April 2026.

Like-for-like volumes were down -1.4%.
Prices up +2.0%.

Latest 3 months v last year

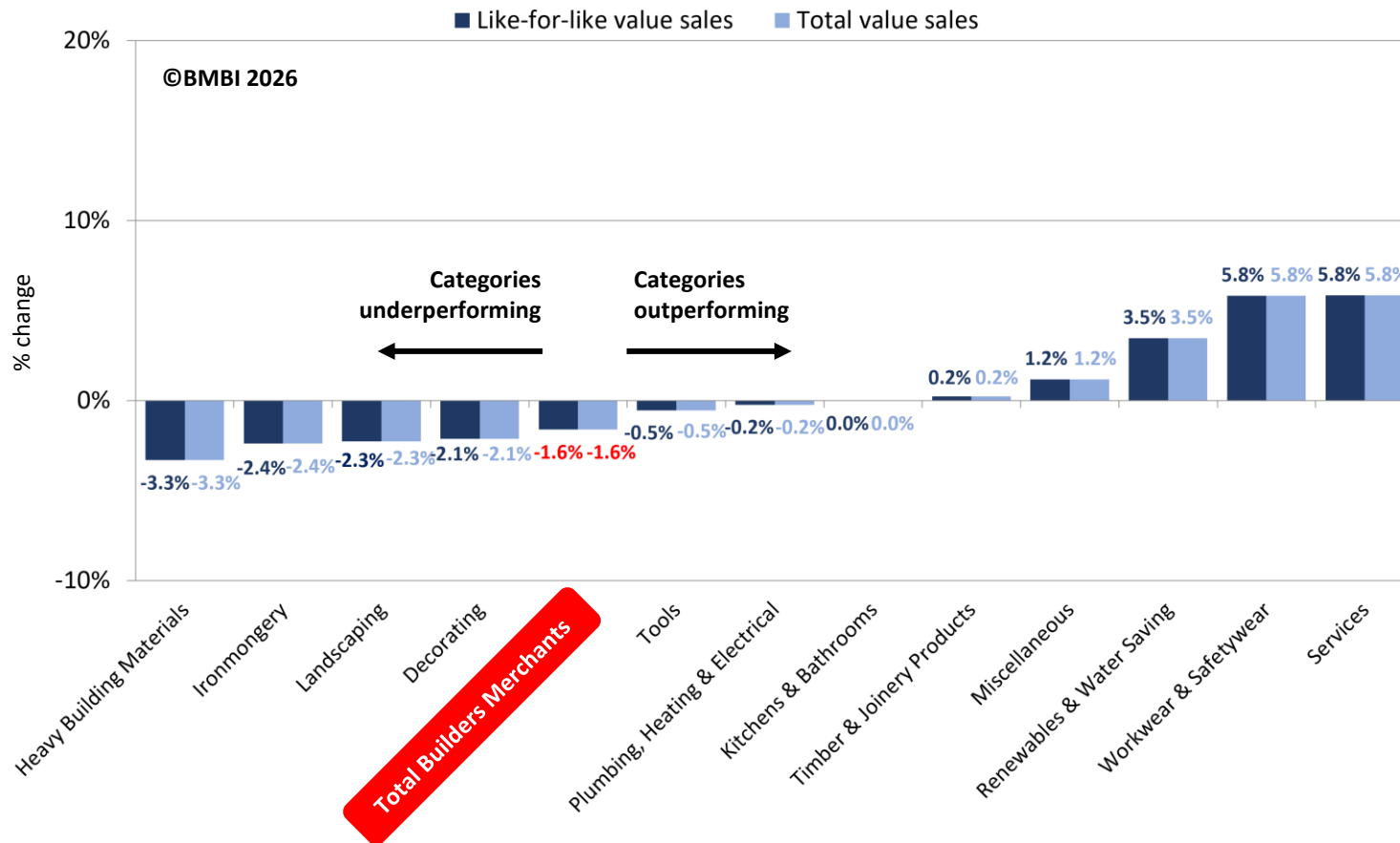
Like-for-like value sales and Total value sales % change



There was no difference in trading days (61).

Like-for-like sales are adjusted to remove the effect of trading day differences.

3 months Mar 26 to May 26 v 3 months Mar 25 to May 25



NIQ GfK

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

Like-for-like value sales are down -1.6% in latest 3 months v previous year.

Like-for-like volumes down -5.9%. **Prices** up +4.5%.

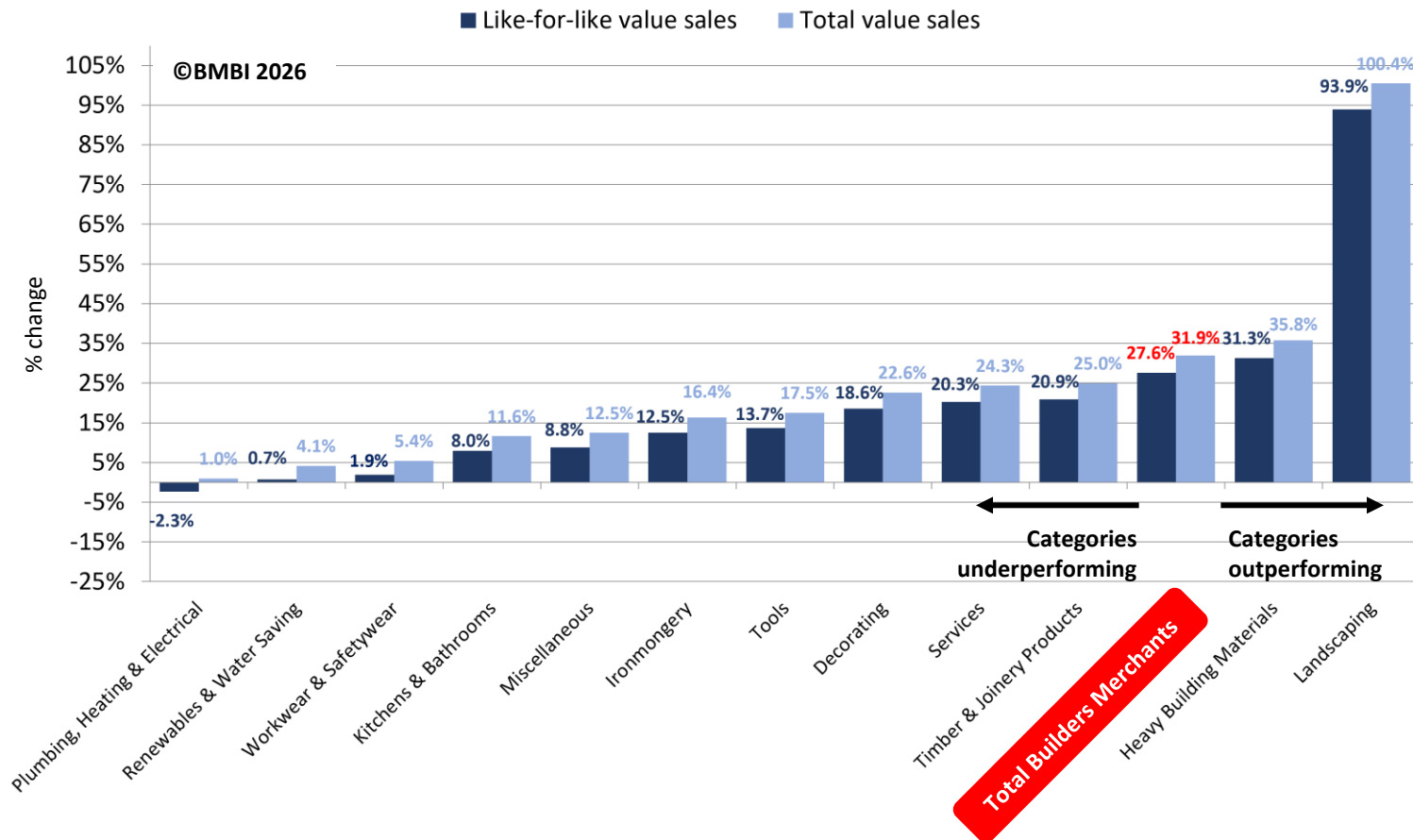
Latest 3 months v previous 3 months

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

61 trading days this recent period v 59 trading days in the previous period.
Like-for-like sales are adjusted to remove the effect of trading day differences.



3 months Mar 26 to May 26 v 3 months Dec 25 to Feb 26



NIQ **GfK**

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

Like-for-like value sales were up +27.6% in last 3 months v previous 3 months.

Landscaping has seen a large seasonal spike of +93.9%

Like-for-like volumes +33.5%.
Prices down -4.4%.

Latest 12 months v previous 12 months

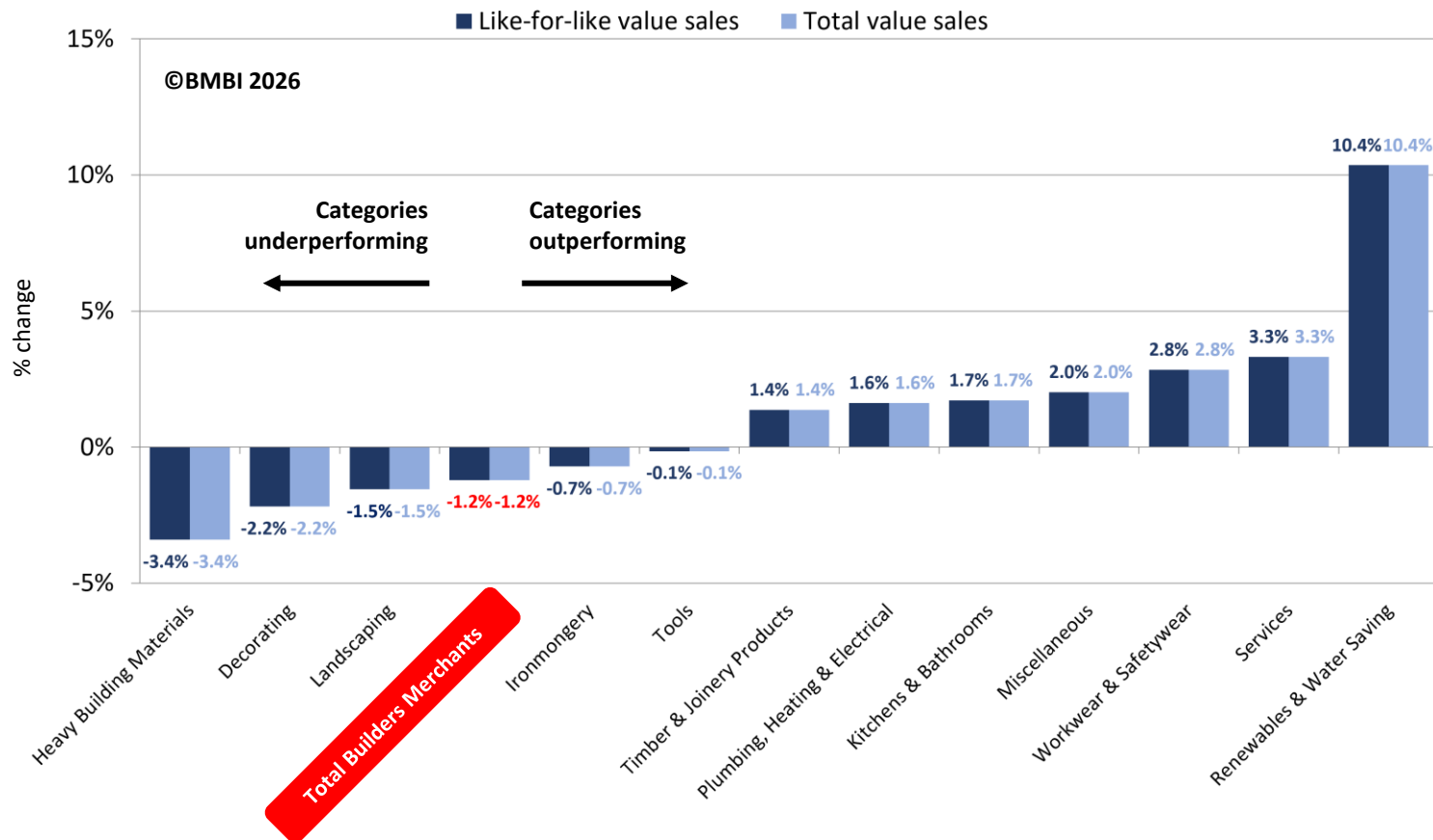
Like-for-like value sales and Total value sales % change



249 trading days in the latest period v 249 trading days last year.

Like-for-like sales are adjusted to remove the effect of trading day differences.

12 months Jun 25 to May 26 v 12 months Jun 24 to May 25



NIQ **GfK**

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

Like-for-like value sales in the latest 12 months, June 2025 to May 2026 were down -1.2% compared to the same period a year earlier.

Like-for-like volume sales -3.2%.
Prices up +2.1%.

Latest 12 months v previous 12 months

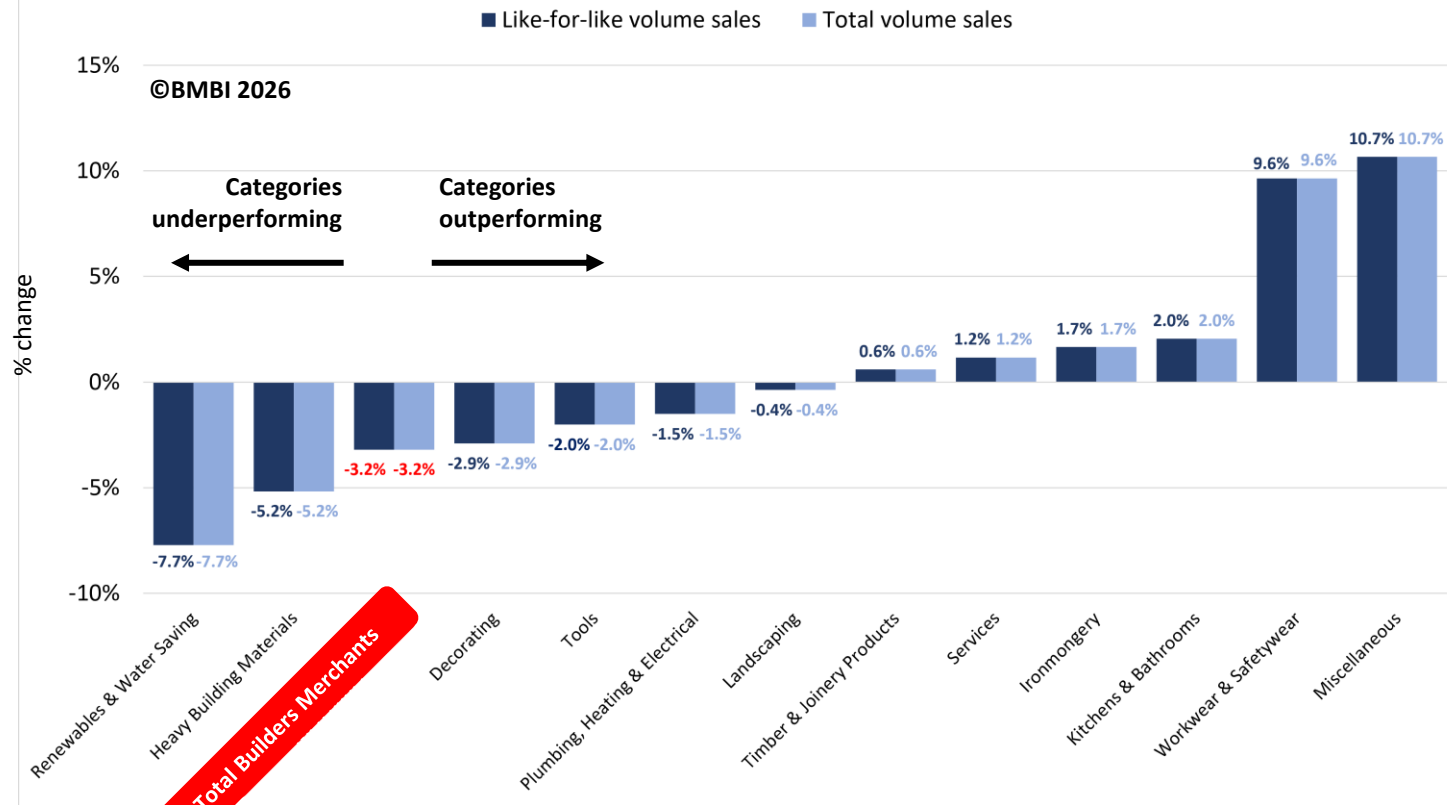
Like-for-like volume sales and Total volume sales % change



249 trading days this year v 249 trading days last year.

Like-for-like sales are adjusted to remove the effect of trading day differences.

June 2025 - May 2026 v June 2024 - May 2025



NIQ **GfK**

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

Total Builders Merchants **like-for-like** volume sales in the latest 12 months, June 2025 to May 2026 were -3.2% lower compared to the same period a year earlier, June 2024 to May 2025

Prices rose +2.1% in the same period

Year-to-date v last year

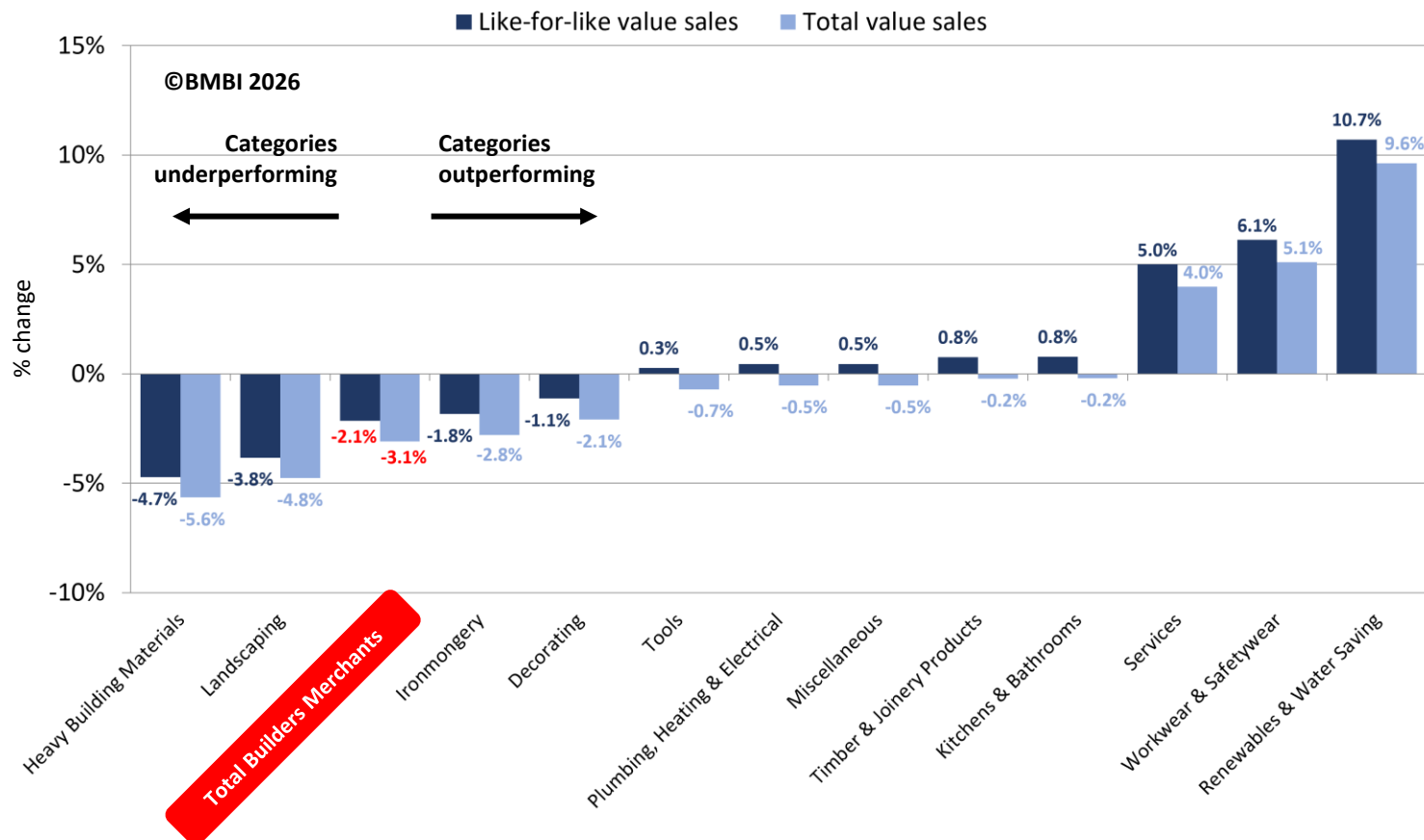
Like-for-like value sales and Total value sales % change

102 trading days in the latest period v 103 trading days last year.

Like-for-like sales are adjusted to remove the effect of trading day differences.



Year to date: Jan 26 to May 26 v Jan 25 to May 25



NIQ GfK

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

Like-for-like value sales in the five months, January to May 2026 were -2.1% lower compared to the same period a year earlier.

Like-for-like volume sales -6.8%.
Prices up +5.0%.

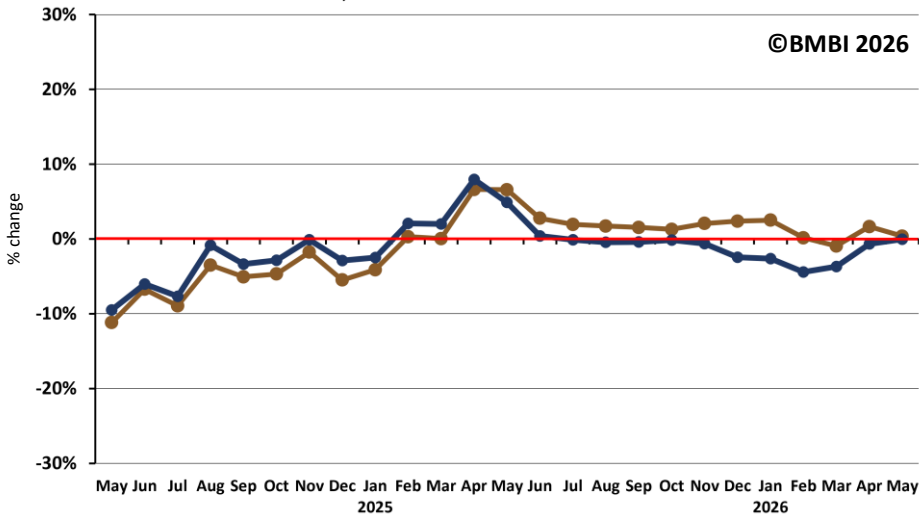
Monthly Year-on-year

Timber & Joinery Products % change

Like-for-like value sales

Timber & Joinery Products - Monthly

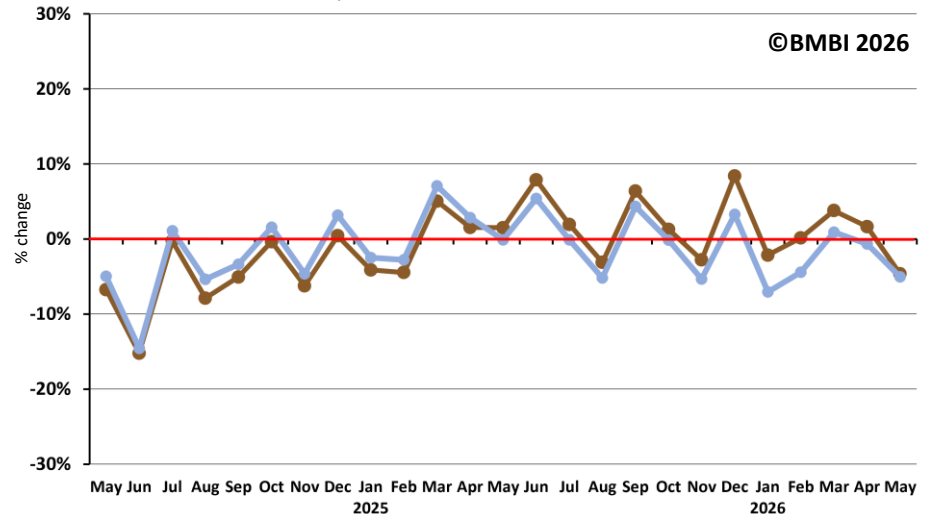
Timber & Joinery Products Total Builders Merchants



Total (unadjusted) value sales

Timber & Joinery Products - Monthly

Timber & Joinery Products Total Builders Merchants



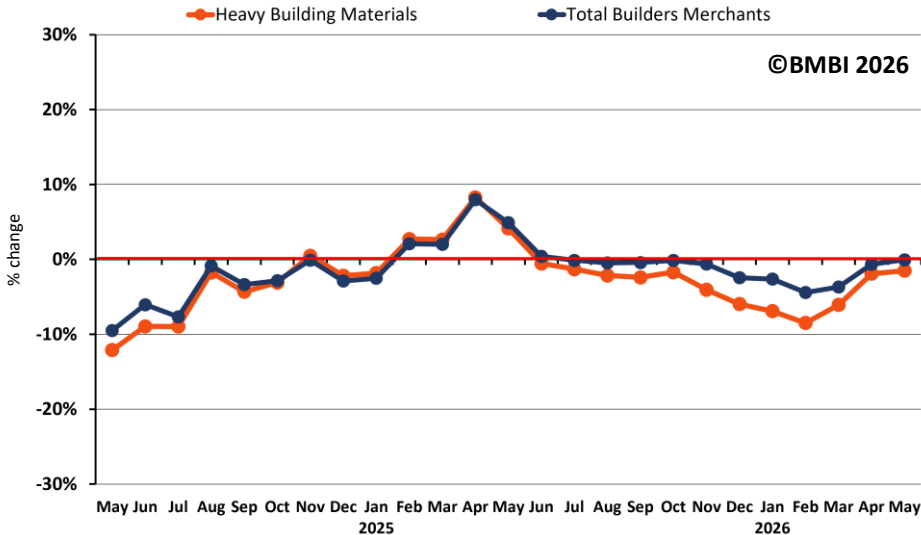
Monthly Year-on-year

Heavy Building Materials % change



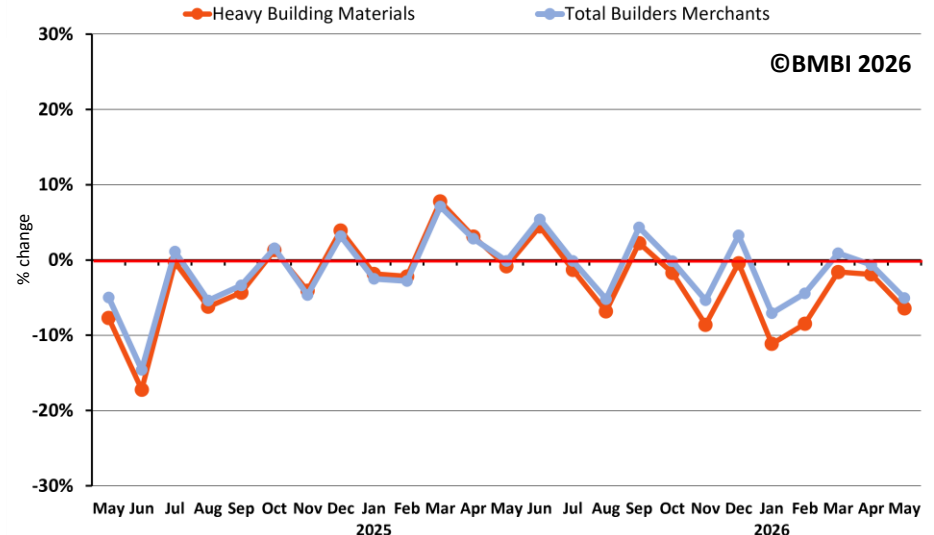
Like-for-like value sales

Heavy Building Materials - Monthly



Total (unadjusted) value sales

Heavy Building Materials - Monthly



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

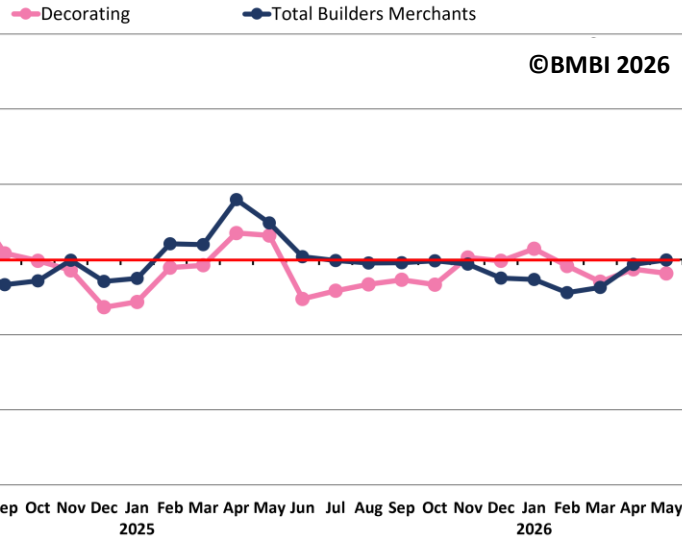
Monthly Year-on-year

Decorating % change



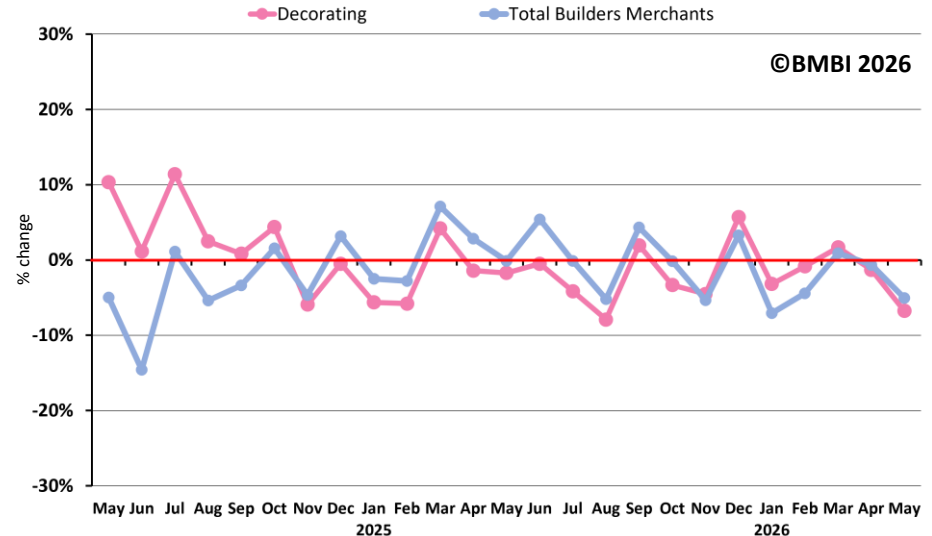
Like-for-like value sales

Decorating - Monthly



Total (unadjusted) value sales

Decorating - Monthly



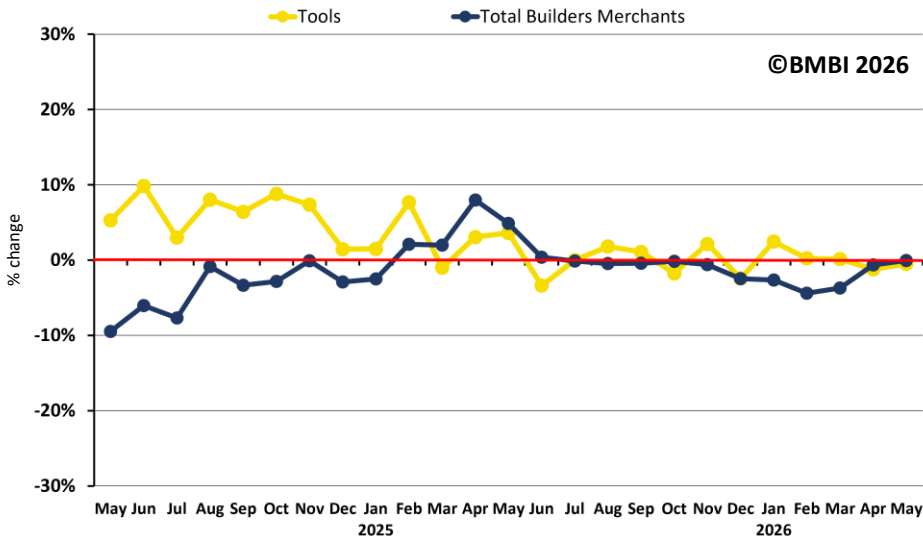
Source: GfK's Builders Merchants
Total Category Report: January
2019 to May 2026

Monthly Year-on-year

Tools % change

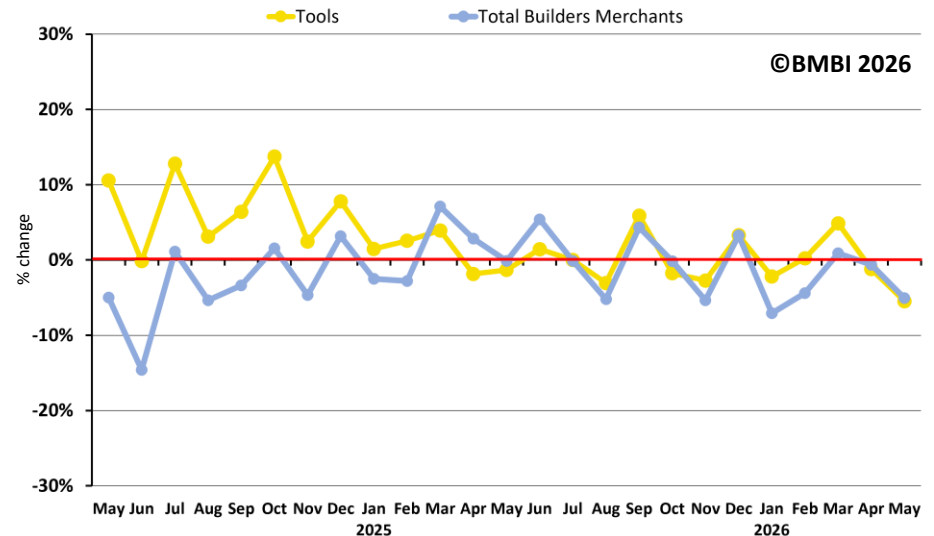
Like-for-like value sales

Tools - Monthly



Total (unadjusted) value sales

Tools - Monthly

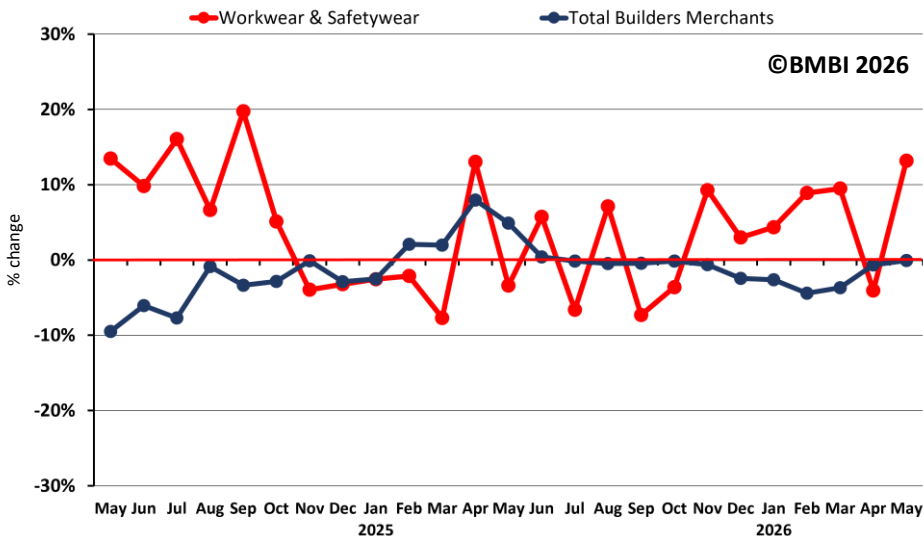


Monthly Year-on-year

Workwear & Safetywear % change

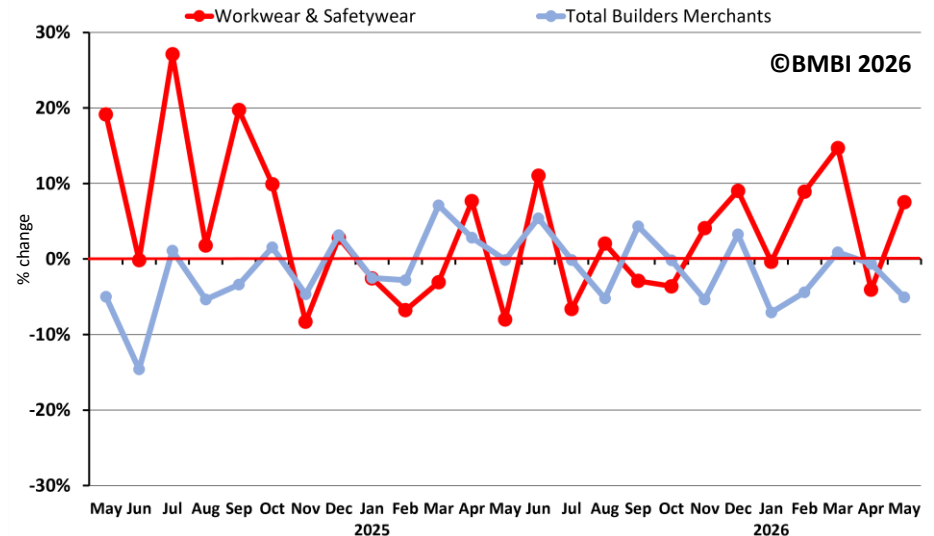
Like-for-like value sales

Workwear & Safetywear - Monthly



Total (unadjusted) value sales

Workwear & Safetywear - Monthly



Monthly Year-on-year

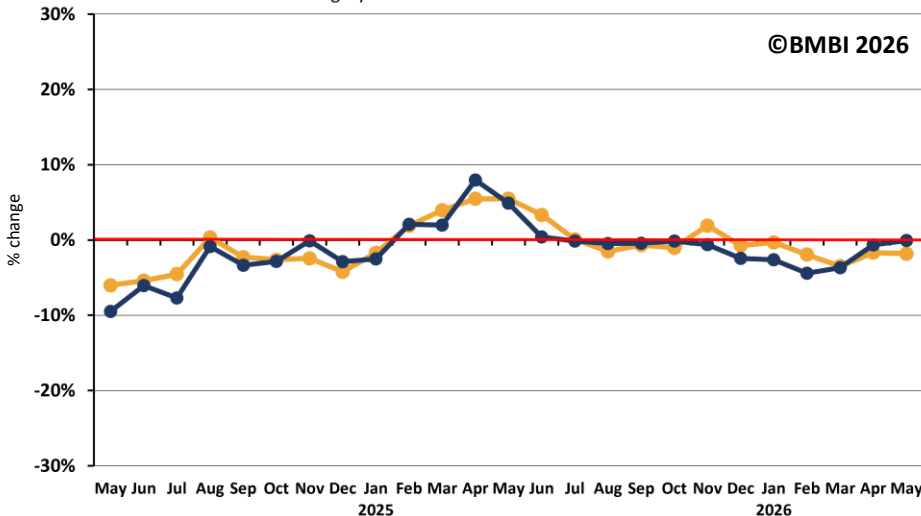
Ironmongery % change

Like-for-like value sales

Ironmongery - Monthly

Ironmongery Total Builders Merchants

©BMBI 2026

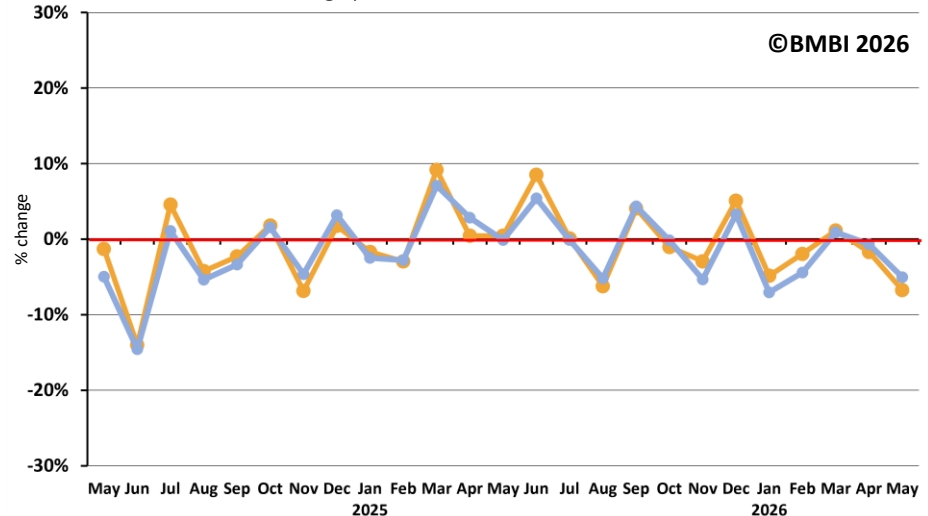


Total (unadjusted) value sales

Ironmongery - Monthly

Ironmongery Total Builders Merchants

©BMBI 2026



Monthly Year-on-year

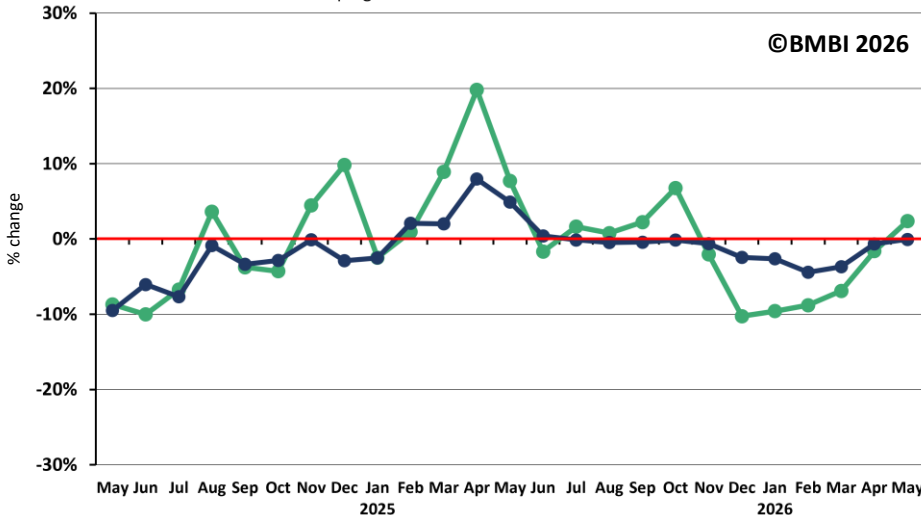
Landscaping % change

Like-for-like value sales

Landscaping - Monthly

Landscaping Total Builders Merchants

©BMBI 2026

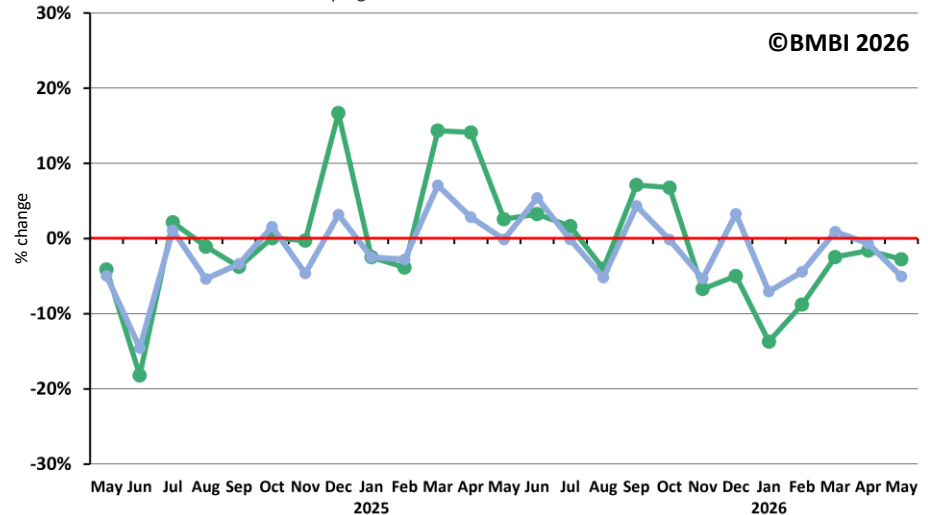


Total (unadjusted) value sales

Landscaping - Monthly

Landscaping Total Builders Merchants

©BMBI 2026



Monthly Year-on-year

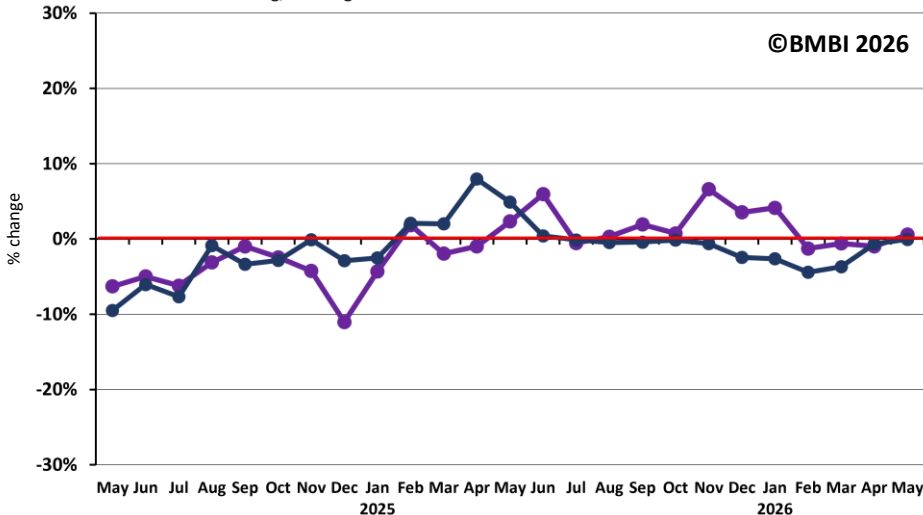
Plumbing, Heating & Electrical % change



Like-for-like value sales

Plumbing, Heating & Electrical - Monthly

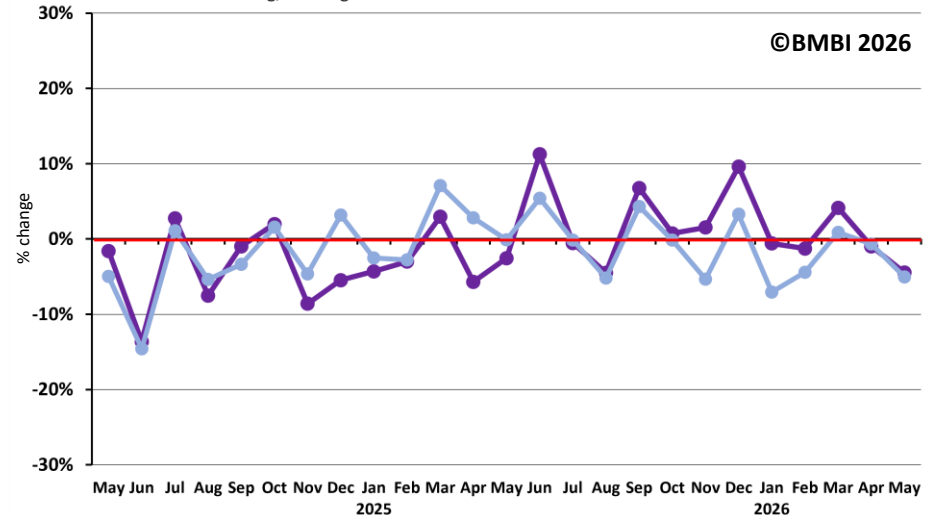
Plumbing, Heating & Electrical Total Builders Merchants



Total (unadjusted) value sales

Plumbing, Heating & Electrical - Monthly

Plumbing, Heating & Electrical Total Builders Merchants



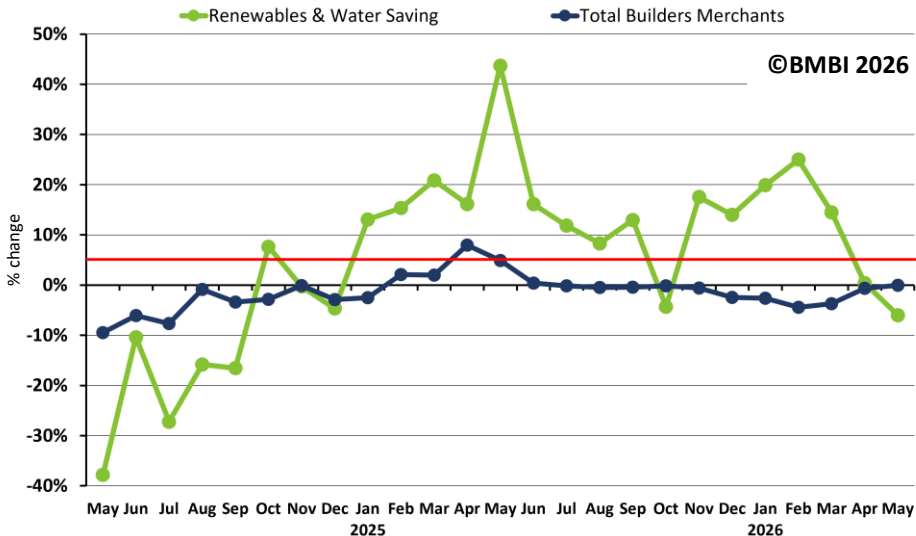
Source: GfK's Builders Merchants
Total Category Report: January
2019 to May 2026

Monthly Year-on-year

Renewables & Water Saving % change

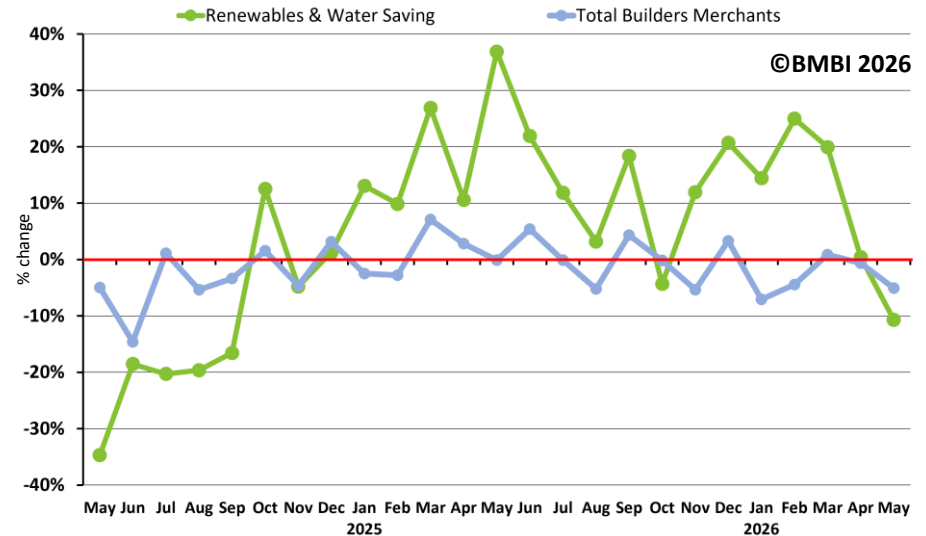
Like-for-like value sales

Renewables & Water Saving - Monthly



Total (unadjusted) value sales

Renewables & Water Saving - Monthly

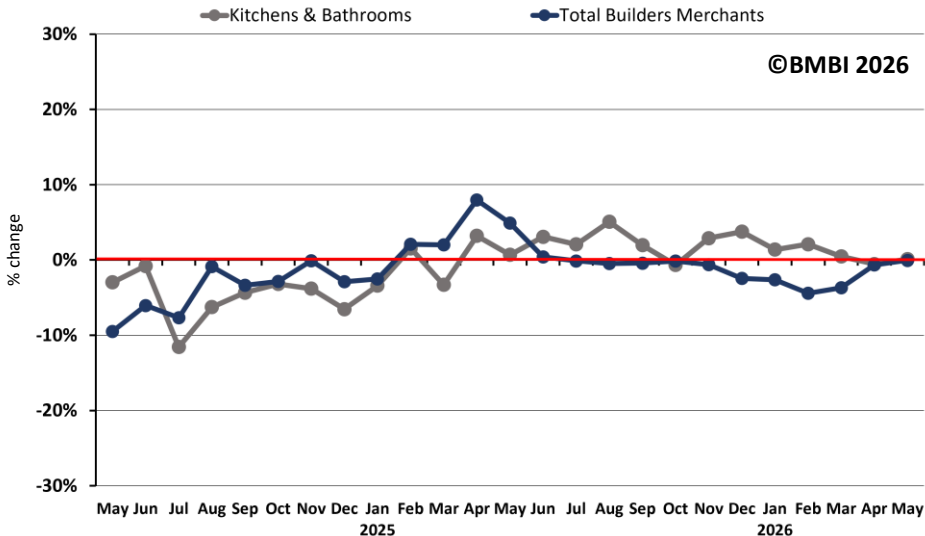


Monthly Year-on-year

Kitchens & Bathrooms % change

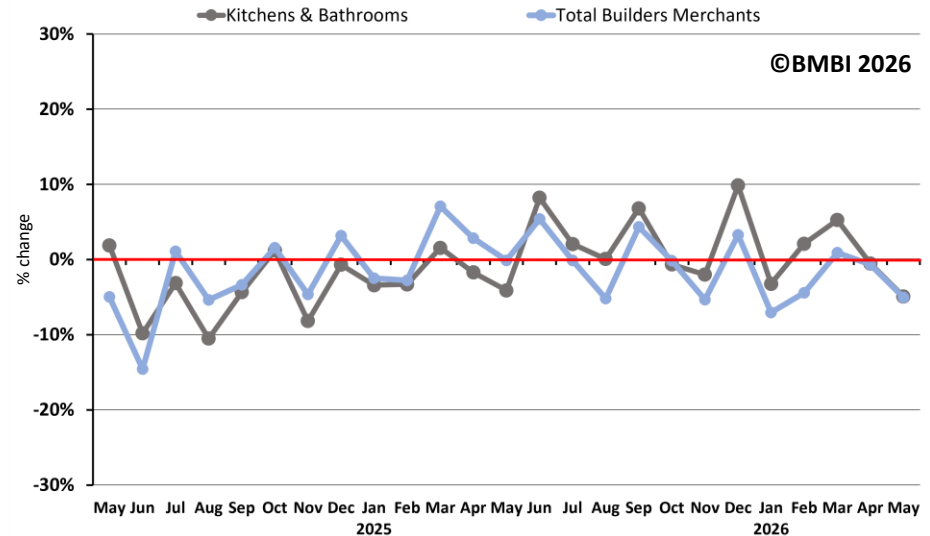
Like-for-like value sales

Kitchens & Bathrooms - Monthly



Total (unadjusted) value sales

Kitchens & Bathrooms - Monthly



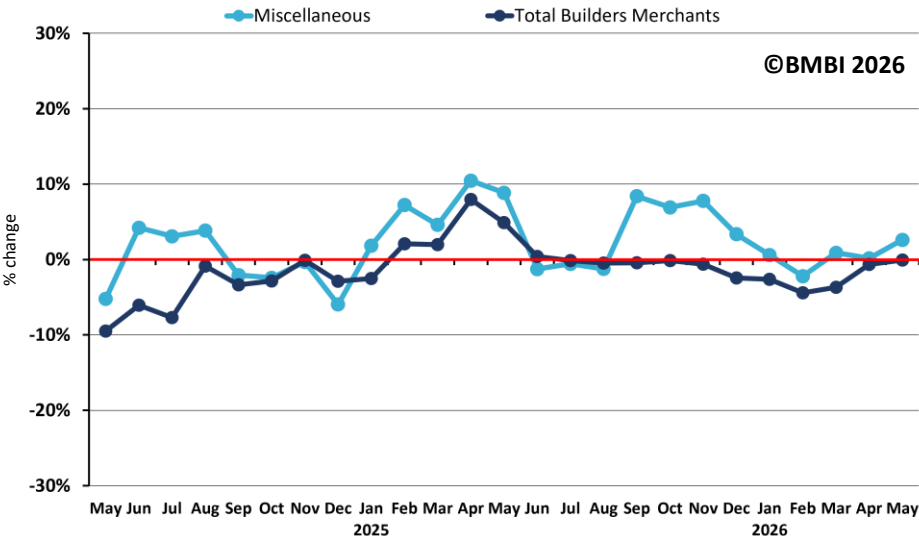
Monthly Year-on-year

Miscellaneous % change

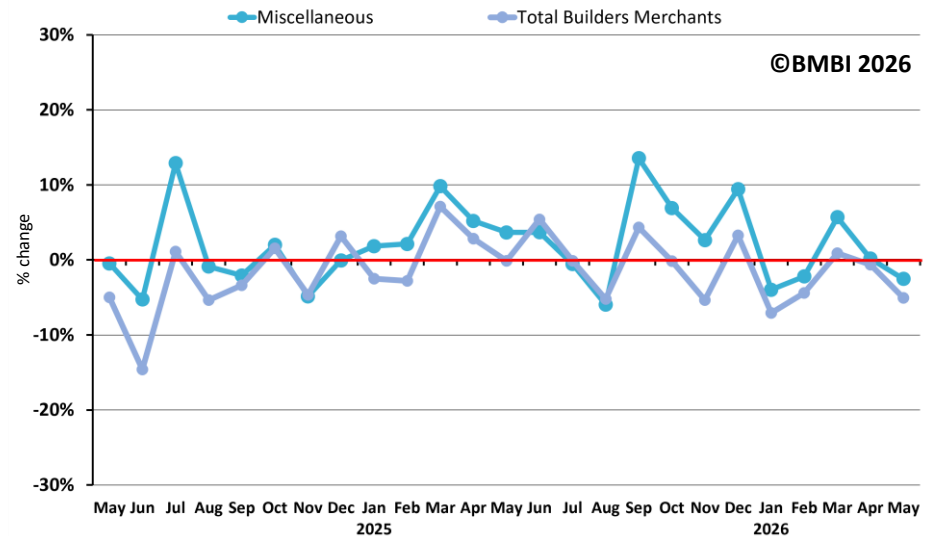
Like-for-like value sales

Total (unadjusted) value sales

Miscellaneous - Monthly



Miscellaneous - Monthly



Monthly Year-on-year

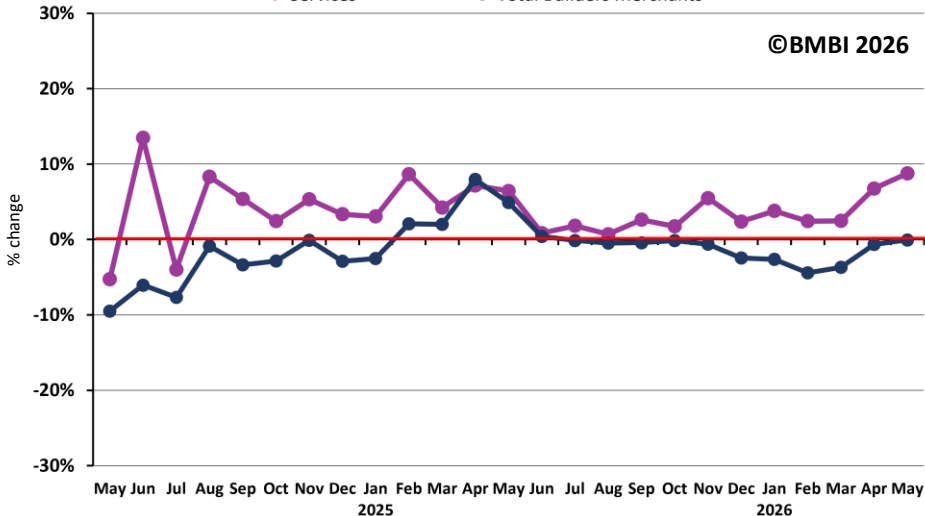
Services % change

Like-for-like value sales

Services - Monthly

Services Total Builders Merchants

©BMBI 2026

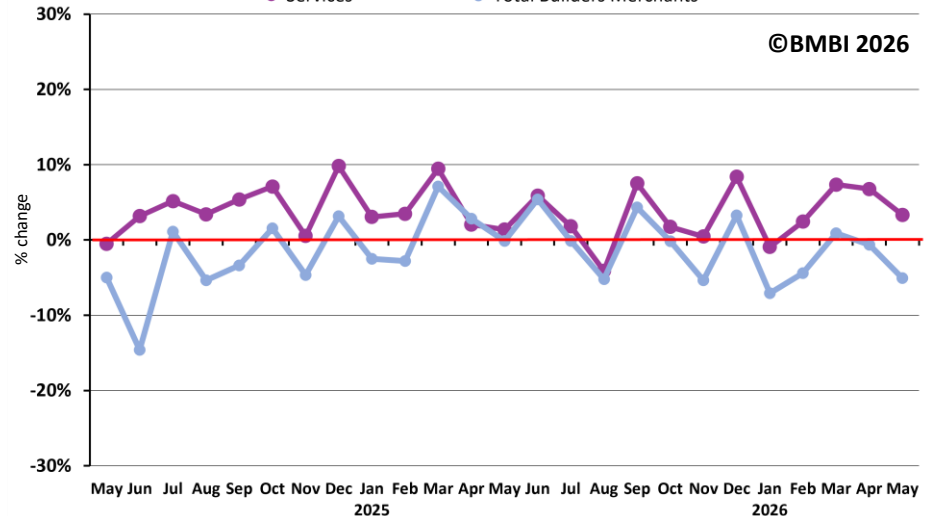


Total (unadjusted) value sales

Services - Monthly

Services Total Builders Merchants

©BMBI 2026



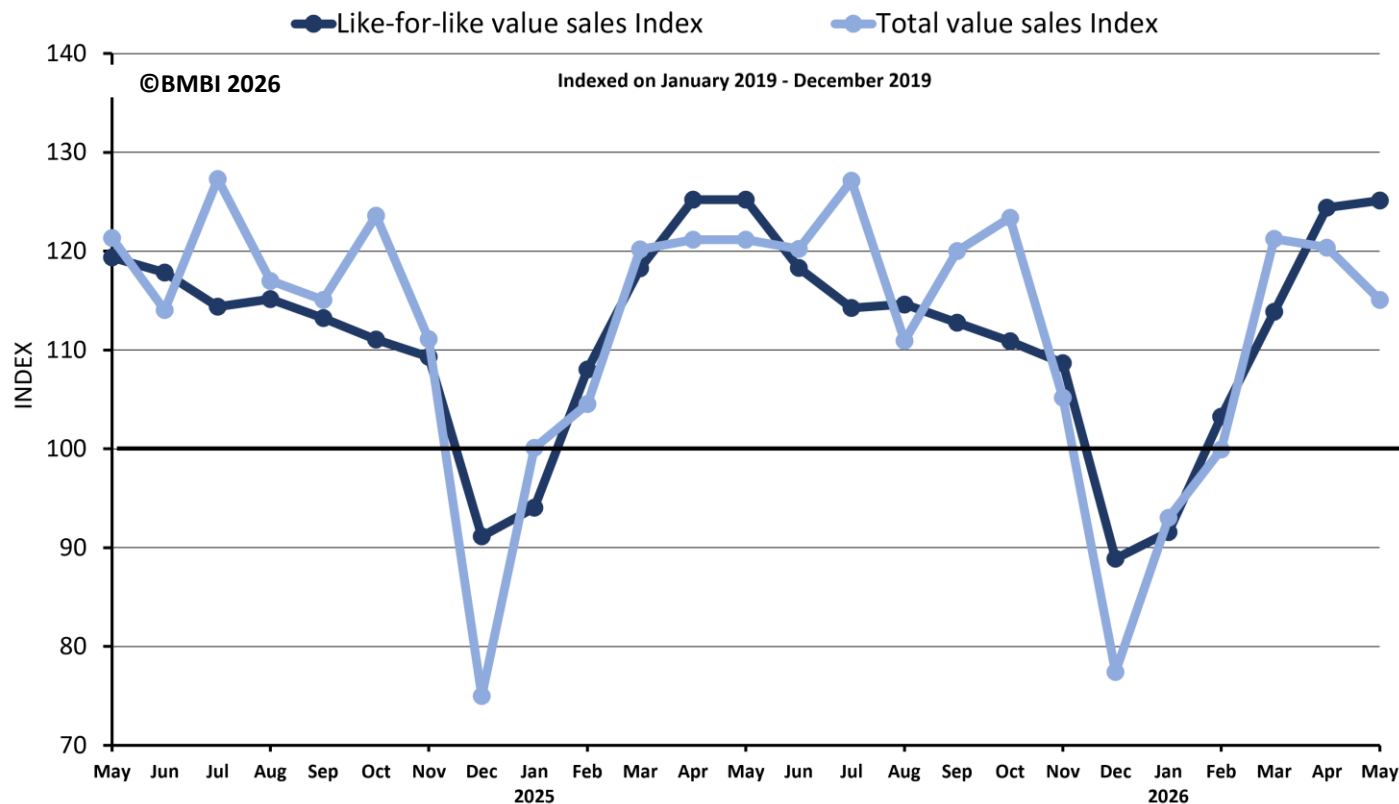
Monthly: Index

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

19 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.



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



NIQ **GfK**

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

May's like-for-like
value sales Index
was 125.1.

Latest month: Index by category

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

19 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.



May 2026 Index

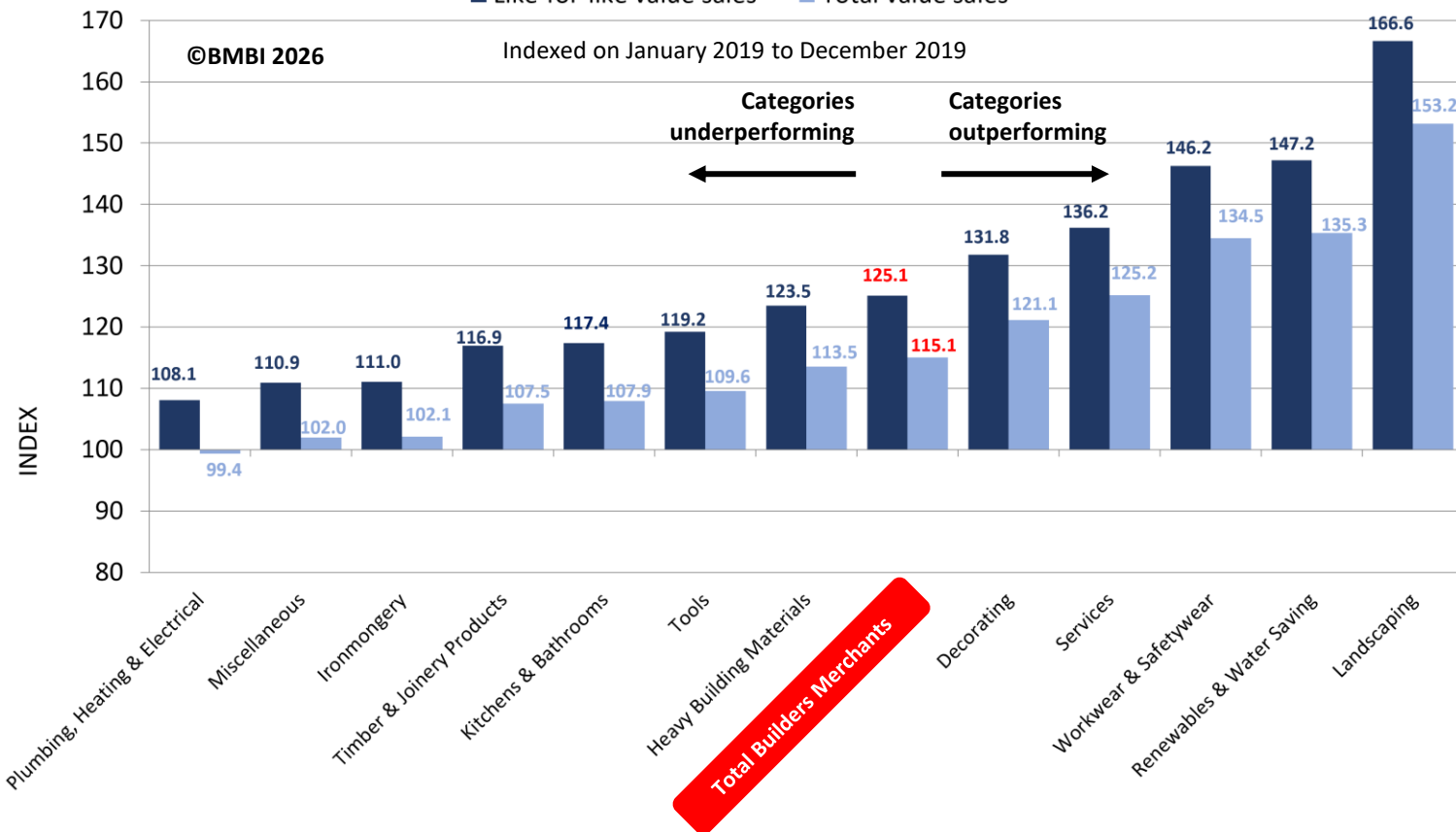
■ Like-for-like value sales ■ Total value sales

©BMBI 2026

Indexed on January 2019 to December 2019

Categories
underperforming

Categories
outperforming



NIQ GfK

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

In like for like value,
Landscaping (166.6)
indexed the highest.

Plumbing, Heating &
Electrical (108.1)
indexed the least.

Monthly: Index by Categories

Like-for-like value sales

May 2025* - May 2026

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



MONTHLY LIKE-FOR-LIKE VALUE SALES INDEX	Index	2025											2026	
		May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Total Builders Merchants	100	125.2	118.2	114.2	114.6	112.7	110.8	108.6	88.9	91.5	103.2	113.9	124.4	125.1
Timber & Joinery Products	100	117.1	111.5	108.8	109.7	109.0	106.8	106.2	87.2	92.4	101.3	108.2	116.8	116.9
Heavy Building Materials	100	125.5	118.8	115.2	114.9	112.8	111.6	106.7	84.9	87.7	100.1	112.3	123.5	123.5
Decorating	100	132.4	123.5	121.1	123.4	120.8	118.6	120.7	102.8	104.6	115.2	123.0	129.2	131.8
Tools	100	119.6	110.8	110.0	112.4	113.9	114.8	117.9	95.8	103.9	115.0	118.7	119.5	119.2
Workwear & Safetywear	100	130.2	128.7	120.5	128.4	135.2	140.1	160.9	131.6	141.9	149.2	144.9	141.1	146.2
Ironmongery	100	112.3	108.9	105.4	103.7	104.3	103.8	105.3	91.1	97.7	103.2	107.0	111.2	111.0
Landscaping	100	161.8	141.9	130.4	129.4	114.8	106.6	91.7	70.0	69.6	88.9	123.7	158.1	166.6
Plumbing, Heating & Electrical	100	109.4	108.2	102.9	102.4	113.4	117.5	127.0	110.7	114.9	119.1	116.8	110.1	108.1
Renewables & Water Saving	100	140.3	132.9	122.2	122.1	124.9	126.7	137.1	118.8	129.3	154.9	152.6	132.6	147.2
Kitchens & Bathrooms	100	116.8	118.0	110.9	114.5	118.1	111.3	123.2	102.9	104.0	119.7	115.8	119.0	117.4
Miscellaneous	100	106.9	98.0	99.5	97.3	103.0	106.7	108.6	94.4	99.6	105.6	107.9	108.4	110.9
Services	100	124.7	118.0	117.4	121.5	115.7	115.5	117.7	112.8	100.3	115.1	124.3	135.2	136.2

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



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

Monthly: Index by Categories

Total value sales

May 2025* - May 2026

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



		2025										2026		
MONTHLY TOTAL VALUE SALES INDEX	Index	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
Total Builders Merchants	100	121.2	120.2	127.1	110.9	120.0	123.3	105.1	77.4	93.0	99.9	121.2	120.4	115.1
Timber & Joinery Products	100	113.3	113.3	121.0	106.2	116.0	118.9	102.8	76.0	93.9	98.0	115.2	113.0	107.5
Heavy Building Materials	100	121.5	120.7	128.2	111.2	120.1	124.2	103.2	74.0	89.1	96.9	119.6	119.5	113.5
Decorating	100	128.1	125.5	134.7	119.5	128.6	132.0	116.8	89.5	106.3	111.4	130.9	125.1	121.1
Tools	100	115.7	112.6	122.4	108.8	121.3	127.7	114.1	83.4	105.6	111.3	126.3	115.6	109.6
Workwear & Safetywear	100	126.0	130.8	134.1	124.2	143.9	155.9	155.7	114.6	144.2	144.4	154.2	136.6	134.5
Ironmongery	100	108.6	110.6	117.3	100.3	111.1	115.5	101.9	79.4	99.3	99.9	113.9	107.7	102.1
Landscaping	100	156.6	144.2	145.1	125.3	122.2	118.6	88.7	61.0	70.7	86.0	131.7	153.0	153.2
Plumbing, Heating & Electrical	100	105.9	110.0	114.5	99.1	120.8	130.8	122.9	96.4	116.8	115.3	124.4	106.6	99.4
Renewables & Water Saving	100	135.7	135.1	136.0	118.2	132.9	141.0	132.7	103.4	131.4	149.9	162.4	128.3	135.3
Kitchens & Bathrooms	100	113.0	119.9	123.4	110.9	125.7	123.9	119.2	89.6	105.7	115.8	123.3	115.1	107.9
Miscellaneous	100	103.5	99.6	110.8	94.1	109.7	118.8	105.1	82.2	101.2	102.2	114.9	104.9	102.0
Services	100	120.7	119.9	130.7	117.6	123.2	128.5	113.9	98.2	101.9	111.4	132.3	130.8	125.2

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



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

Trading Days

Monthly

Index: 20.7

2024											
Jan 22	Feb 21	Mar 20	Apr 21	May 21	Jun 20	Jul 23	Aug 21	Sep 21	Oct 23	Nov 21	Dec 17
2025											
Jan 22	Feb 20	Mar 21	Apr 20	May 20	Jun 21	Jul 23	Aug 20	Sep 22	Oct 23	Nov 20	Dec 18
2026											
Jan 21	Feb 20	Mar 22	Apr 20	May 19	Jun	Jul	Aug	Sep	Oct	Nov	Dec

Quarterly

Index: 62

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

Half Year

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

Full Year

2024
251
2025
250
2026

NiQ GfK's Definition of Builders Merchant Panel



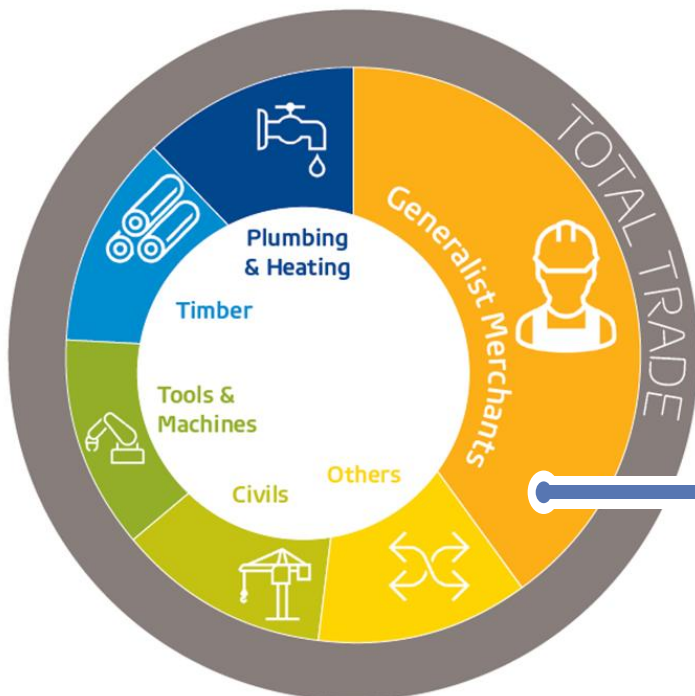
Generalist Builders Merchants definition:

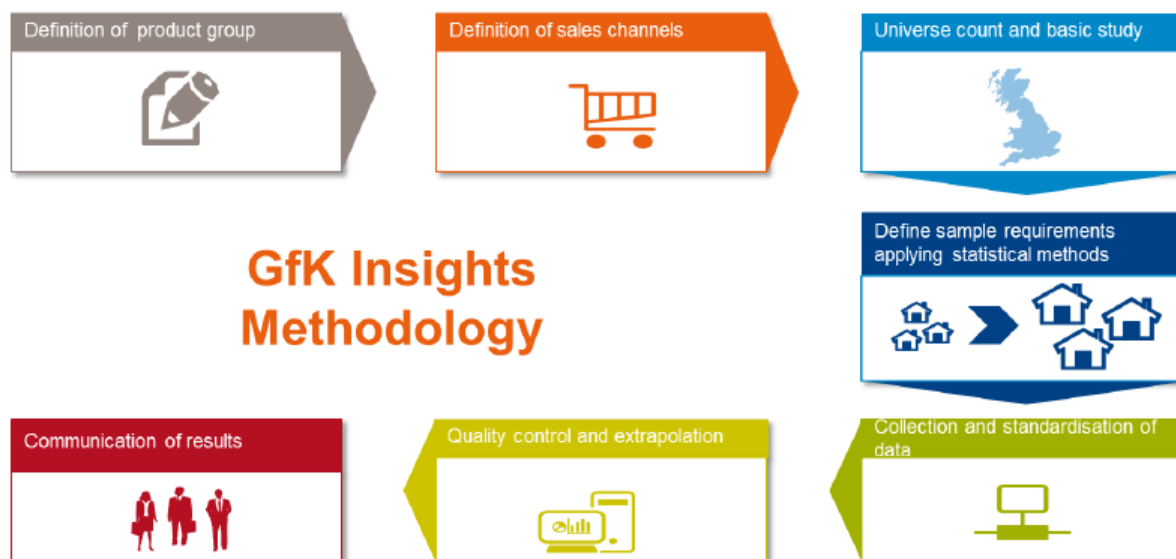
- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users. Only multiple merchants are considered; they are defined as having more than 3 outlets or a turnover of greater than £3m p.a.
- This excludes branches that generate all their sales from specialized areas such as Civils, Tiles and Tools. Estimated coverage of this channel sits at 88%.

Examples include:



INDEPENDENT BUILDERS MERCHANT GROUP





GfK collect live sales-out data from our panel of merchant partners.

We add value to that data through the application of each sold product's unique technical features. We compare like-for-like products and categories from like-for-like merchants and aggregate this within our reports.

Our international methodology is based on robust scientific principles and delivers continuous, reliable information that can be applied to your business requirements.

NiQ GfK's Product Categories

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

NIQ



Headline values available

Timber & Joinery Products

Timber
Sheet Materials
Cladding
Flooring & Flooring Accessories
Mouldings
Stairs & Stairparts
Window & Frames
Doors/Door Frames

Heavy Building Materials

Bricks Blocks & Damp Proofing
Drainage/Civils/Guttering
Lintels
Cement/Aggregate/Cement Accs
Concrete Mix/Products
Plasters Plasterboards and Accessories
Roofing Products
Insulation
Cement Mixers/Mixing Buckets Products
Builders Metalwork
Other Heavy Building Equipment/Material

Decorating

Paint/Woodcare
Paint Brushes Rollers & Pads
Adhesives/Sealants/Fillers
Tiles And Tiling Accessories
Decoration Preparation & Decorating Sundries
Wall Coverings

Tools

Hand Tools
Power Tools
Power Tool Accessories
Ladders & Access Equipment

Workwear And Safetywear

Clothing
Safety Equipment

Ironmongery

Fixings And Fastenings
Security
Other Ironmongery

Landscaping

Garden Walling/Paving
Driveways/Block Paving/Kerbs
Decorative Aggregates
Fencing And Gates
Decking
Other Gardening Equipment

Plumbing Heating & Electrical

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

Renewables And Water Management

Water Saving
Renewables & Ventilation

Kitchens & Bathrooms

Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

Miscellaneous

Cleaning/Domestic/Personal
Automotive
Glass
Other Furniture & Shelving
Other Misc

Services

Toolhire / Hire Services
Other Services

TOTAL CATEGORY REPORT (TCR)



TRACKED PRODUCT GROUP REPORTING



In-depth product group reporting

Monthly sales values, volumes, pricing analysis & distribution facts available by brand and key product features.

For insights on your product group please contact Emile van der Ryst at NiQ GfK

emile.vanderryst@nielseniq.com

Available categories:

Heavyside

Bricks
Insulation

Lightside

Emulsion Paints (incl. Masonry & Base)
Trim Paints
Primers/Undercoats
Woodcare
Adhesives
Sealants
Fillers/PU Foam
Tile Fixing (Adhesives/Grout)

Excellence in building materials supply



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

BMF Forecast Report

Summer 2026 Edition

Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Summer 2026 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



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BMBI Experts

Building & Construction brands who are interested in becoming BMBI Experts to speak for their markets, and build their brands, should contact Callum Budd.