

Excellence in building  
materials supply

# Builders Merchant Building Index



**Monthly report for July 2026**

(Published 28 September 2026)

# Highlights - Like-for-like value sales

(adjusted to remove the effect of trading days)

## BMBI: July 2026

### Like-for-like value sales

(adjusted to remove the effect of trading days)

Builders Merchant  
Building Index 

[www.bmbi.co.uk](http://www.bmbi.co.uk)



Latest month  
July 2026  
v  
Last year  
July 2025

**-0.6%**

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

**-1.2%**

Latest 12 months  
August 2025 - July 2026  
v  
Previous 12 months  
August 2024 - July 2025

**-1.5%**

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

**-1.9%**

“Total Builders Merchants **like-for-like value sales** were -0.6% lower in July 2026 compared with the same month last year. **Like-for-like volume** sales were down -7.6%.”

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# Highlights - Total (unadjusted) value sales

## BMBI: July 2026 Total (unadjusted) value sales

Latest month  
July 2026  
v  
Last year  
July 2025

**-0.6%**

Latest 3 months  
May 2026 - July 2026  
v  
Last year  
May 2025 - Jul 2025

**-1.2%**

Latest 12 months  
August 2025 - July 2026  
v  
Previous 12 months  
August 2024 - July 2025

**-1.5%**

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

**-1.9%**

With no difference in trading days in the latest month, **unadjusted value** sales were -0.6% lower in July 2026 than in July 2025. **Volume** sales were down -7.6% but **prices increased** +7.6%.

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# Introduction:

## Builders Merchant Building Index



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

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

### Executive Summary

Short of time and just want to read the headlines? Download an Executive Summary that provides a snapshot of value sales and trends from Britain's Builders' Merchants for August [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](mailto: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 Q2 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: Q2 2026 Report](#)

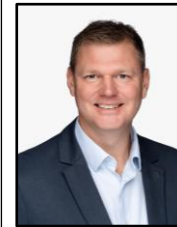
### Expert for Natural Stone & Porcelain Paving:



**James Crossland**  
Commercial Director  
Pavestone Group

[Read latest Comment: Q2 2026 Report](#)

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q2 2026 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q2 2026 Report](#)

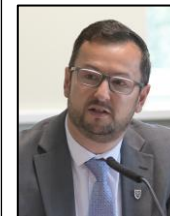
### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q2 2026 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Heidelberg Materials

[Read latest Comment: Q2 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 Heating and Hot Water Solutions:



**Paul Haynes**  
Product, Solutions & Marketing Director  
Baxi

[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](#)



NIQ



# 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](mailto: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

## July 2026 like-for-like value sales were -0.6% lower compared with July 2025

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

- Total Builders Merchants like-for-like value sales were -0.6% lower in July 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 -7.6% but prices were up +7.6%.

### Latest 3 months v previous year: May 2026 - July 2026 v May 2025 - July 2025

- Total Builders Merchants like-for-like value sales were -1.2% lower in the latest 3 months compared to the previous year.
- Total Builders Merchants like-for-like volume sales were down -8.0% but prices were up +7.4%.

### Latest 12 months v previous 12 months: August 2025 - July 2026 v August 2024 - July 2025

- Total Builders Merchants like-for-like value sales in the latest 12 months, August 2025 to July 2026 were -1.5% lower compared to the same period a year earlier, August 2024 to July 2025.
- Total Builders Merchants like-for-like volume sales were down -5.0% and prices were up +3.7%.

### Year-to-date: January - July 2026 v January - July 2025

- Total Builders Merchants like-for-like value sales in the seven months, January to July 2026 were -1.9% lower compared to the same period a year earlier, January to July 2025.
- Total Builders Merchants like-for-like volume sales were down -7.4% but prices were up +5.9%.

## Year-to-date

Total Builders Merchants **like-for-like value** sales in the 7 months January to July were -1.9% down v the same period a year earlier, January to July 2025.

Overview continues on the next page...

# Overview - 2 - Total (unadjusted)

... continued from the previous page:

## July 2026 v July 2025

- With no difference in trading days in the latest month, unadjusted value sales were -0.6% lower in July 2026 than in July 2025. By value, six of the twelve categories sold more, led by Workwear & Safetywear (+18.5%) and Services (+7.7%). Plumbing, Heating & Electrical (-4.6%), Heavy Building Materials (-2.6%), Tools (-2.5%) and Renewables & Water Saving (-2.4%) saw the largest decreases.
- With no difference in trading days, unadjusted volume sales were -7.6% lower in July 2026 than in July 2025 but prices were up +7.6%. By volume, five of the twelve categories sold more. Services (+22.6%), Workwear & Safetywear (+15.2%) and Miscellaneous (+13.6%) were the top performing categories. Timber & Joinery Products (-1.3%) fell less than Total Builders Merchants, but Heavy Building Materials was down -11.1%.

## Latest three months v last year: May 2026 - July 2026 v May 2025 - July 2025

- With no difference in trading days in the latest period, unadjusted value sales were also -1.2% lower in the latest 3 months compared to last year. By value, four of the twelve categories sold more, led by Workwear & Safetywear (+12.5%) and Services (+7.6%). Timber & Joinery Products (-0.7%) fell less than Total Builders Merchants, but Heavy Building Materials fell more (-2.8%). Renewables & Water Saving (-4.7%) was the weakest category
- With no difference in trading days, unadjusted volume sales were -8.0% lower in the latest 3 months compared to last year. Prices increased +7.4%. Four of the twelve categories sold more by volume: Workwear & Safetywear (+18.0%) and Services (+14.0%) performed best. Timber & Joinery Products (-2.7%) declined less than Total Builders Merchants, but Heavy Building Materials fell -11.2%.

## July 2026 v July 2025

With no difference in trading days, **unadjusted value** sales were -0.6% lower in July than in July 2025.

Overview continues on the next page...

# Overview - 3 - Total (unadjusted)

... continued from the previous page:

## **Latest 12 months v previous 12 months: August 2025 - July 2026 v August 2024 - July 2025**

- With no difference in trading days in the latest period, unadjusted value sales were also -1.5% lower than in the previous 12 months. By value, seven of the categories sold more, led by Renewables and Water Saving (+7.2%). Timber and Joinery Products grew by +0.8% but Heavy Building Materials declined -3.8% and was the weakest category.
- With no difference in trading days, unadjusted volume sales were -5.0% lower in the latest 12 months versus the previous 12 months. Prices were up +3.7%. By volume, five of the twelve categories sold more, led by: Miscellaneous (+12.8%) and Workwear & Safetywear (+12.4%). Timber & Joinery Products fell -0.4%, while Heavy Building Materials fell -7.6%.

## **Year-to-date: January - July 2026 v January - July 2025**

- With no difference in trading days in the latest period unadjusted value sales were -1.9% lower in the seven months, January to July 2026 versus the same period a year earlier. By value, six of the twelve categories sold more, led by Workwear & Safetywear (+7.8%). Timber & Joinery Products (+0.2%) performed better than Total Builders Merchants. Heavy Building Materials fell -4.3%, and was the weakest category.
- With no difference in trading days, unadjusted volume sales were -7.4% lower in the seven months, January to July 2026 than the same period a year earlier. Prices were up +5.9%. By volume, five of the twelve categories sold more. Workwear & Safetywear (+17.0%) and Miscellaneous (+13.8%) performed best. Timber & Joinery Products (-1.5%) fell less than Total Builders Merchants, but Heavy Building Materials (-10.5%) was the second weakest category after Renewables & Water Saving (-20.2%).

## **Year-to-date**

With no difference in trading days in the latest period **unadjusted value** sales were -1.9% lower in the 7 months, January to July versus the same 7 months a year earlier.

# Latest month v last year

Total value sales, total volume sales & price % change



## July 2026 v July 2025

| ©BMBI 2026                      | Total value sales<br>(GBP % change) | Total volume sales<br>(Units % change) | Price<br>(Unit price % change) |
|---------------------------------|-------------------------------------|----------------------------------------|--------------------------------|
| Workwear & Safetywear           | +18.5%                              | +15.2%                                 | +2.9%                          |
| Services                        | +7.7%                               | +22.6%                                 | -12.1%                         |
| Landscaping                     | +4.8%                               | -3.5%                                  | +8.6%                          |
| Miscellaneous                   | +3.3%                               | +13.6%                                 | -9.0%                          |
| Decorating                      | +1.7%                               | -3.7%                                  | +5.6%                          |
| Kitchens & Bathrooms            | +1.0%                               | +9.7%                                  | -7.9%                          |
| <b>Total Builders Merchants</b> | <b>-0.6%</b>                        | <b>-7.6%</b>                           | <b>+7.6%</b>                   |
| Timber & Joinery Products       | -0.7%                               | -1.3%                                  | +0.6%                          |
| Ironmongery                     | -0.9%                               | +3.4%                                  | -4.2%                          |
| Renewables & Water Saving       | -2.4%                               | -30.8%                                 | +41.0%                         |
| Tools                           | -2.5%                               | -3.8%                                  | +1.4%                          |
| Heavy Building Materials        | -2.6%                               | -11.1%                                 | +9.5%                          |
| Plumbing, Heating & Electrical  | -4.6%                               | -10.7%                                 | +6.9%                          |



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

With no difference in trading days in the latest month, **unadjusted value** sales were down -0.6% July 2026 v July 2025.

**Unadjusted volume** sales were down -7.6% but **prices** were up +7.6%.

# Latest 12 months v previous 12 months

Total value sales, total volume sales & price % change



## August 2025 – July 2026 v August 2024 – July 2025

| ©BMBI 2026                      | Total value sales<br>(GBP % change) | Total volume sales<br>(Units % change) | Price<br>(Unit price % change) |
|---------------------------------|-------------------------------------|----------------------------------------|--------------------------------|
| Renewables & Water Saving       | +7.2%                               | -12.6%                                 | +22.7%                         |
| Workwear & Safetywear           | +5.0%                               | +12.4%                                 | -6.6%                          |
| Services                        | +4.4%                               | +4.1%                                  | +0.3%                          |
| Miscellaneous                   | +2.9%                               | +12.8%                                 | -8.8%                          |
| Kitchens & Bathrooms            | +1.1%                               | +2.2%                                  | -1.1%                          |
| Timber & Joinery Products       | +0.8%                               | -0.4%                                  | +1.2%                          |
| Plumbing, Heating & Electrical  | +0.4%                               | -3.1%                                  | +3.6%                          |
| Tools                           | -0.5%                               | -2.4%                                  | +1.9%                          |
| Landscaping                     | -1.0%                               | -1.7%                                  | +0.6%                          |
| Decorating                      | -1.3%                               | -2.6%                                  | +1.3%                          |
| <b>Total Builders Merchants</b> | <b>-1.5%</b>                        | <b>-5.0%</b>                           | <b>+3.7%</b>                   |
| Ironmongery                     | -1.6%                               | +1.3%                                  | -2.8%                          |
| Heavy Building Materials        | -3.8%                               | -7.6%                                  | +4.1%                          |



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

With no difference in trading days  
**unadjusted value** sales were -1.5% lower in the latest 12 months v the same period a year earlier

**Unadjusted volume** sales were -5.0% lower. **Prices** were up +3.7%.

# Year to date

Total value sales, total volume sales & price % change



## January 2026 – July 2026 v January 2025 – July 2025



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

Total Builders  
Merchants  
**unadjusted value**  
sales were down  
-1.9% Jan - July  
2026 v Jan  
– July 2025

**Unadjusted  
volume** sales  
were down -7.4%  
but prices were  
up +5.9%.

| ©BMBI 2026                      | Total value sales<br>(GBP % change) | Total volume sales<br>(Units % change) | Price<br>(Unit price % change) |
|---------------------------------|-------------------------------------|----------------------------------------|--------------------------------|
| Workwear & Safetywear           | +7.8%                               | +17.0%                                 | -7.8%                          |
| Renewables & Water Saving       | +6.2%                               | -20.2%                                 | +33.1%                         |
| Services                        | +5.7%                               | +6.5%                                  | -0.7%                          |
| Miscellaneous                   | +1.4%                               | +13.8%                                 | -10.9%                         |
| Kitchens & Bathrooms            | +0.3%                               | +3.0%                                  | -2.6%                          |
| Timber & Joinery Products       | +0.2%                               | -1.5%                                  | +1.7%                          |
| Decorating                      | -0.7%                               | -2.9%                                  | +2.2%                          |
| Tools                           | -0.9%                               | -3.0%                                  | +2.2%                          |
| Plumbing, Heating & Electrical  | -1.1%                               | -5.5%                                  | +4.7%                          |
| Landscaping                     | -1.7%                               | -4.3%                                  | +2.7%                          |
| <b>Total Builders Merchants</b> | <b>-1.9%</b>                        | <b>-7.4%</b>                           | <b>+5.9%</b>                   |
| Ironmongery                     | -2.2%                               | +0.2%                                  | -2.5%                          |
| Heavy Building Materials        | -4.3%                               | -10.5%                                 | +7.0%                          |

# Latest month v last year

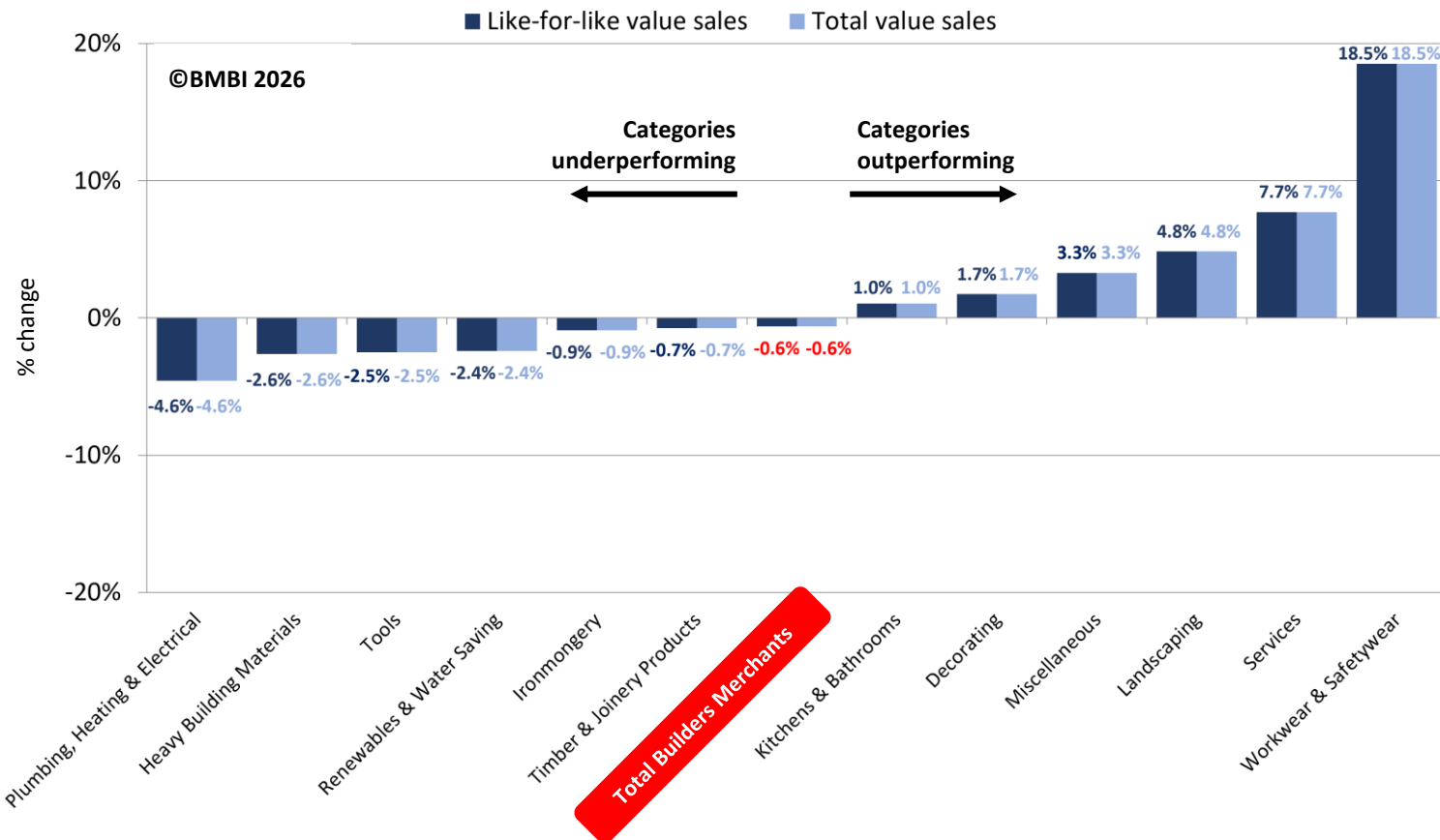
## Like-for-like value sales and Total value sales % change

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

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



### July 2026 v July 2025



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

**Like-for-like value sales** were -0.6% lower in July 2026 v same month last year.

**Like-for-like volume sales** were down -7.6%.  
**Prices** were up +7.6%.

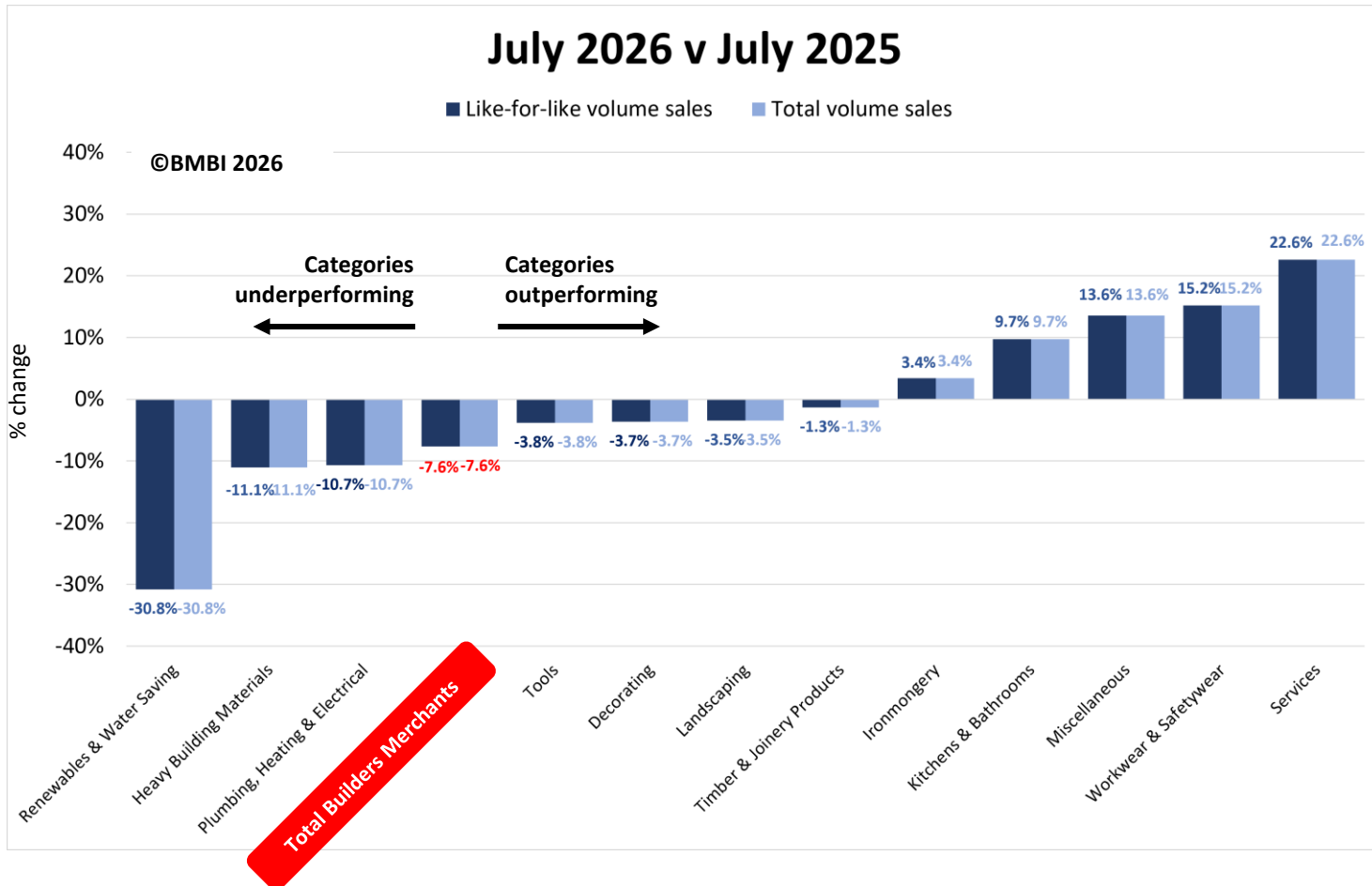


# Latest month v last year

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

23 trading days this month v 23 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 July 2026

Services was the  
standout category -  
up +22.6% like-  
for-like Volume  
sales.

# Latest month v previous month

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

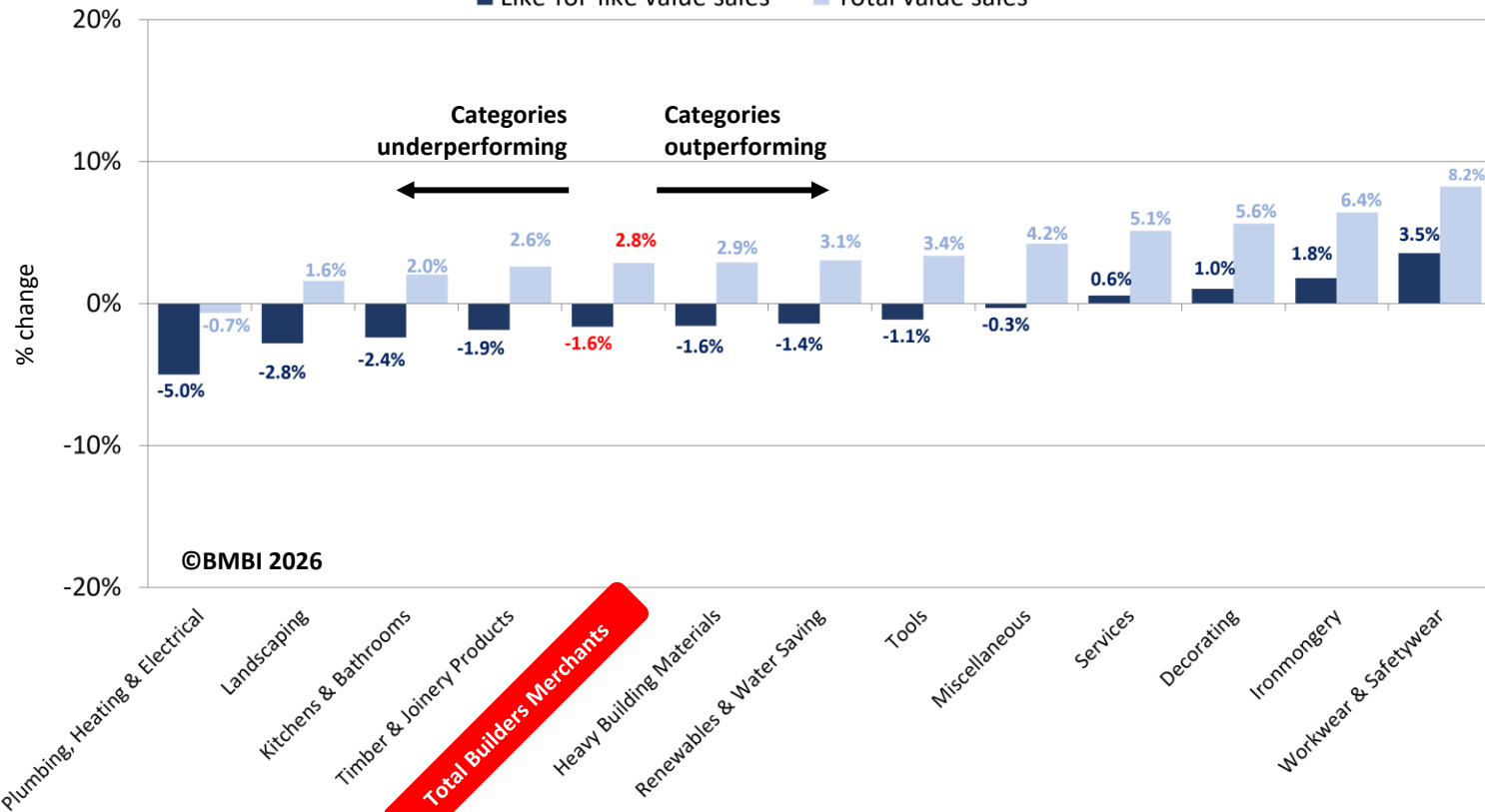
23 trading days this month v 22 trading days last month.

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



### July 2026 v June 2026

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



NIQ GfK

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

**Like-for-like value sales** were down -1.6% in July 2026 v June 2026.

**Like-for-like volumes** were down -1.4%.  
**Prices** down -0.2%.

# Latest 3 months v last year

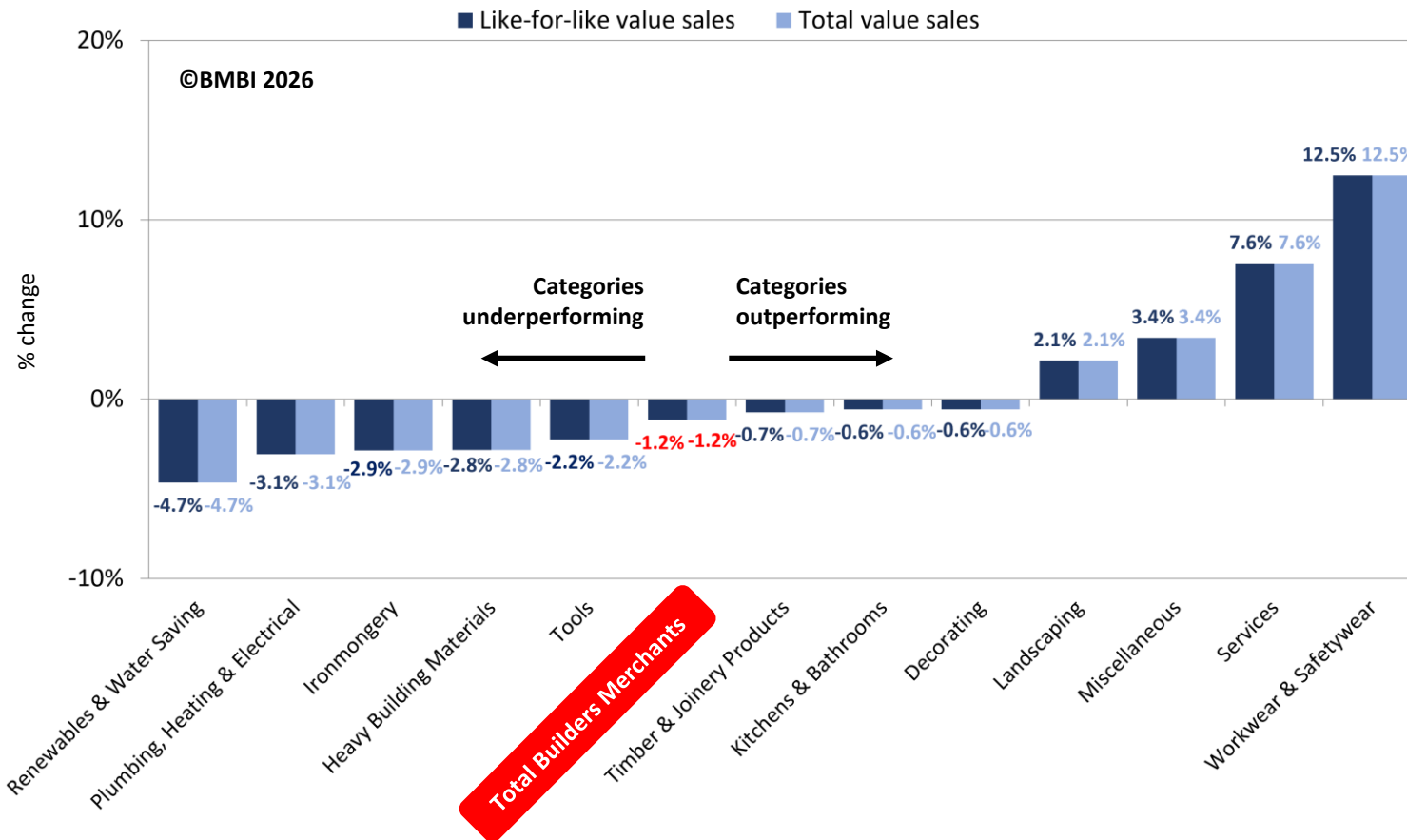
Like-for-like value sales and Total value sales % change

There was no difference in trading days (64).

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



## 3 months May 26 to Jul 26 v 3 months May 25 to Jul 25



NIQ GfK

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

**Like-for-like value sales** are down -1.2% in latest 3 months v previous year.

**Like-for-like volumes** down -8.0%. **Prices** up +7.4%.

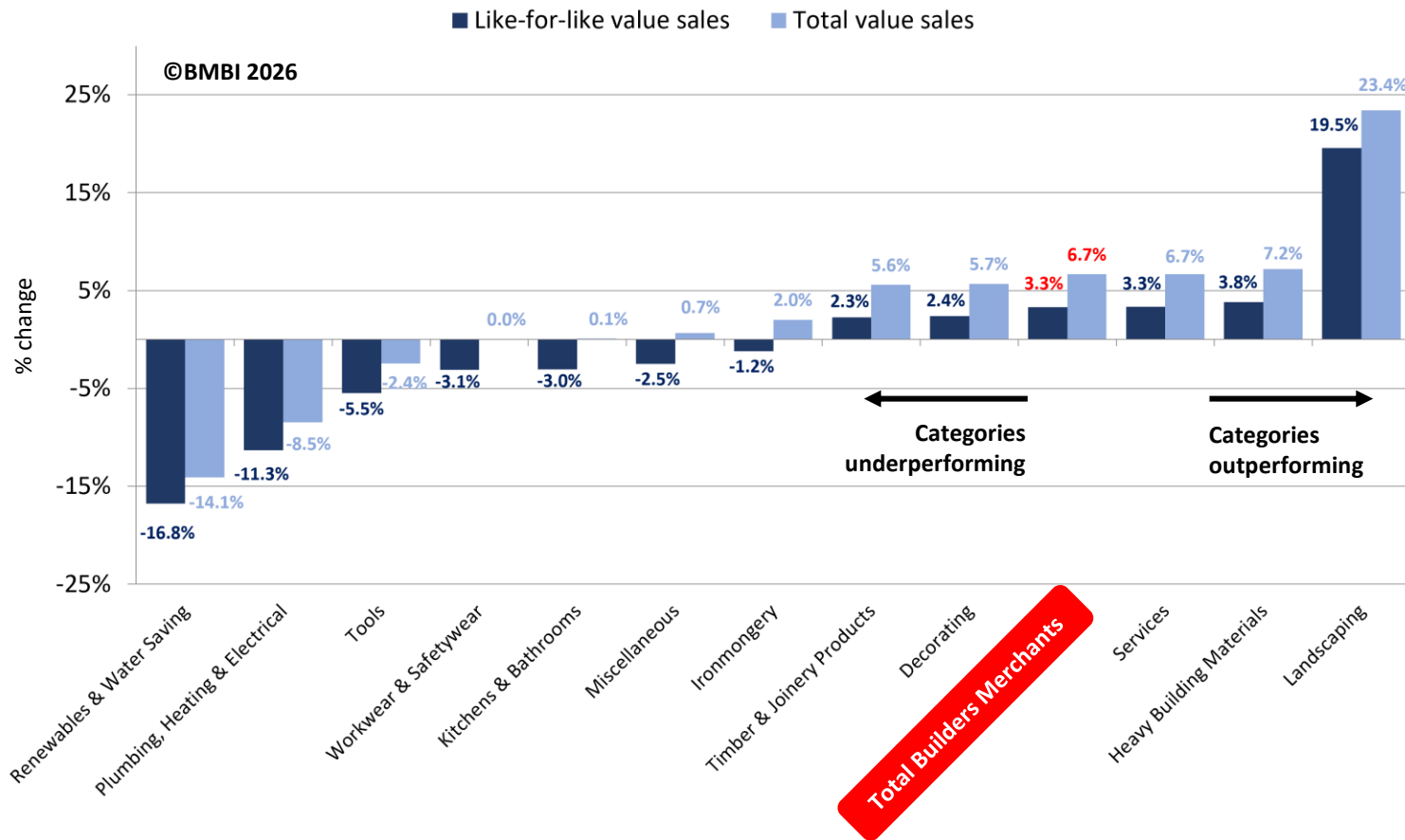
# Latest 3 months v previous 3 months

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

64 trading days this recent period v 62 trading days in the previous period.  
Like-for-like sales are adjusted to remove the effect of trading day differences.



### 3 months May 26 to Jul 26 v 3 months Feb 26 to Apr 26



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

**Like-for-like value sales** were up +3.3% in last 3 months v previous 3 months.

**Like-for-like volumes** +2.0%.  
**Prices** up +1.3%.

# Latest 12 months v previous 12 months

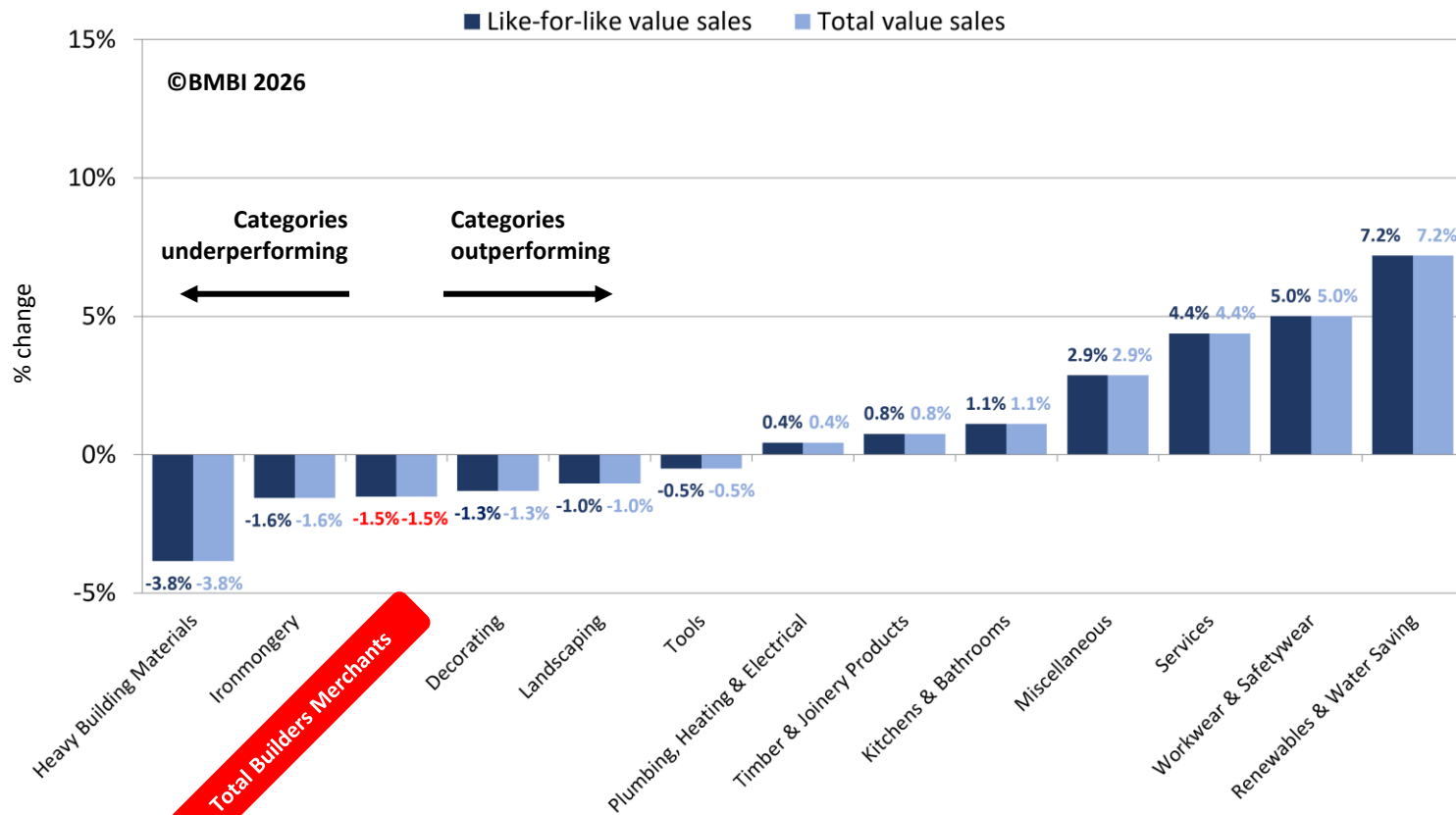
Like-for-like value sales and Total value sales % change



250 trading days in the latest period v 250 trading days last year.

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

## 12 months Aug 25 to Jul 26 v 12 months Aug 24 to Jul 25



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

**Like-for-like value sales** in the latest 12 months, August 2025 to July 2026 were down -1.5% compared to the same period a year earlier.

**Like-for-like volume sales** -5.0%.  
Prices up +3.7%.

# Latest 12 months v previous 12 months

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

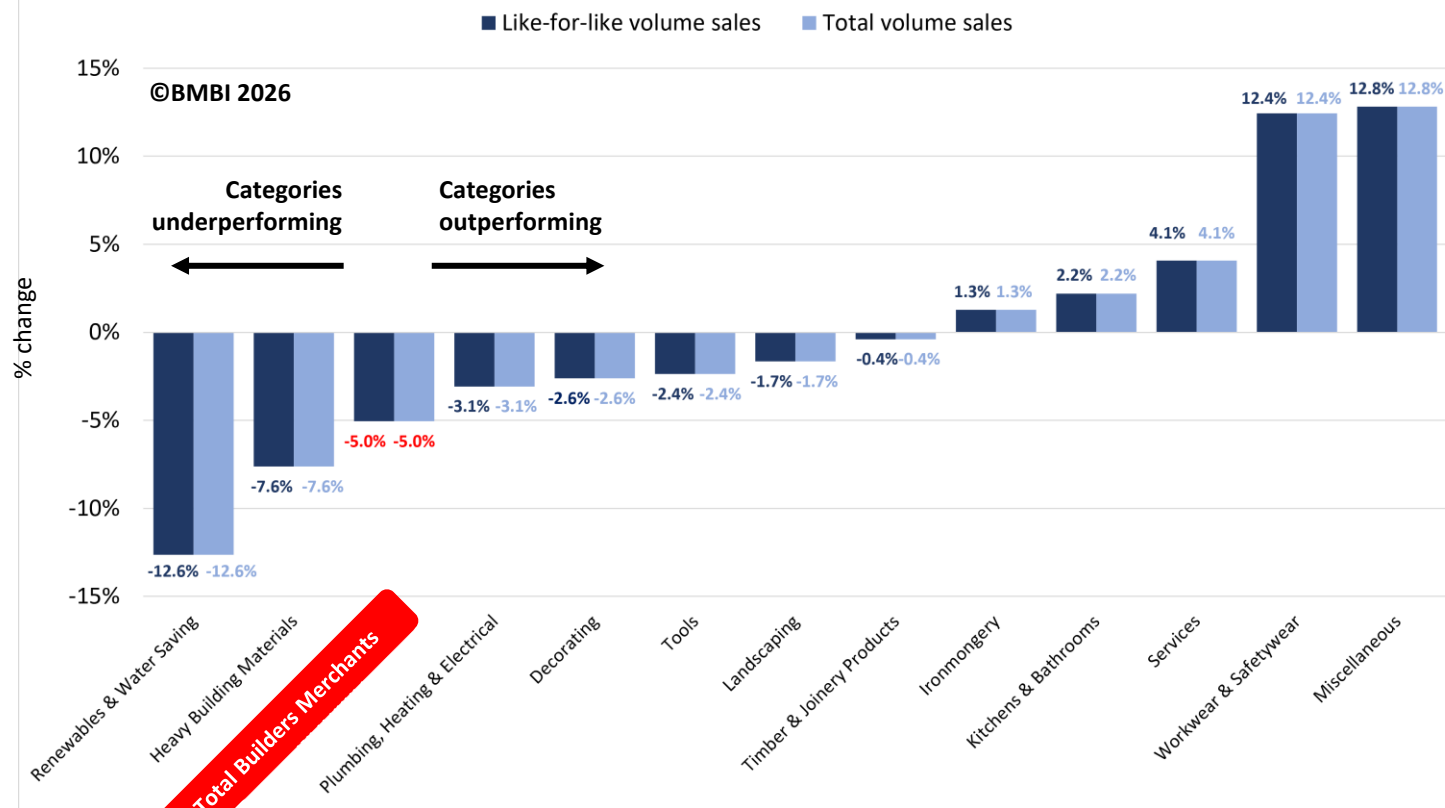
Builders Merchant  
Building Index



250 trading days this year v 250 trading days last year.

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

## August 2025 - July 2026 v August 2024 - July 2025



NIQ GfK

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

Total Builders Merchants **like-for-like** volume sales in the latest 12 months, August 2025 to July 2026 were -5.0% lower compared to the same period a year earlier, August 2024 to July 2025

**Prices** rose +3.7% in the same period

# Year-to-date v last year

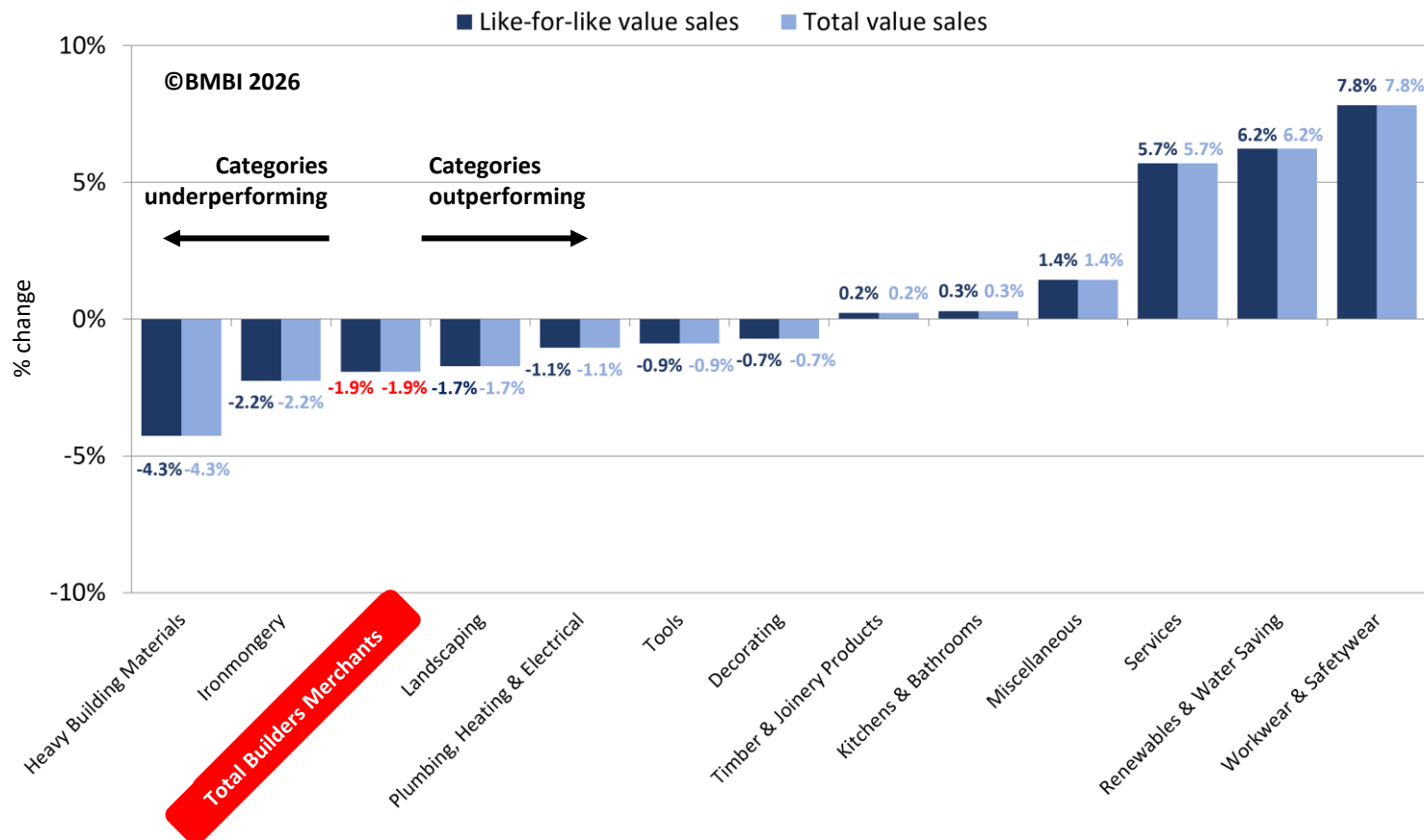
## Like-for-like value sales and Total value sales % change

147 trading days in the latest period v 147 trading days last year.

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



### Year to date: Jan 26 to Jul 26 v Jan 25 to Jul 25



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

**Like-for-like value sales** in the seven months, January to July 2026 were -1.9% lower compared to the same period a year earlier.

**Like-for-like volume sales** -7.4%.  
Prices up +5.9%.

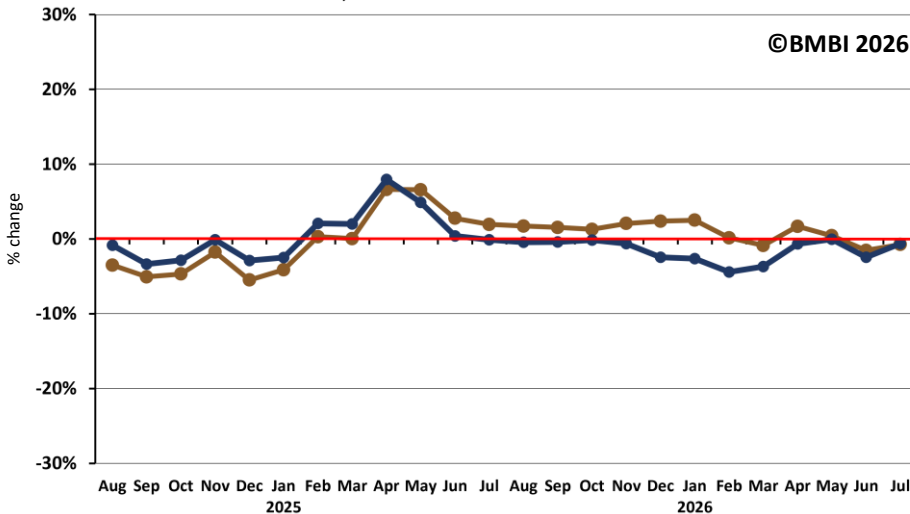
# Monthly Year-on-year

## Timber & Joinery Products % change

### Like-for-like value sales

Timber & Joinery Products - Monthly

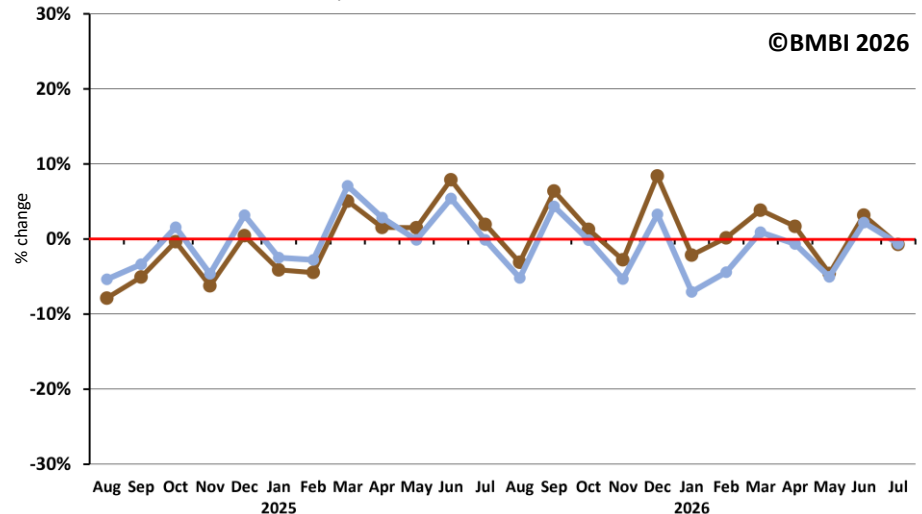
Timber & Joinery Products Total Builders Merchants



### Total (unadjusted) value sales

Timber & Joinery Products - Monthly

Timber & Joinery Products Total Builders Merchants



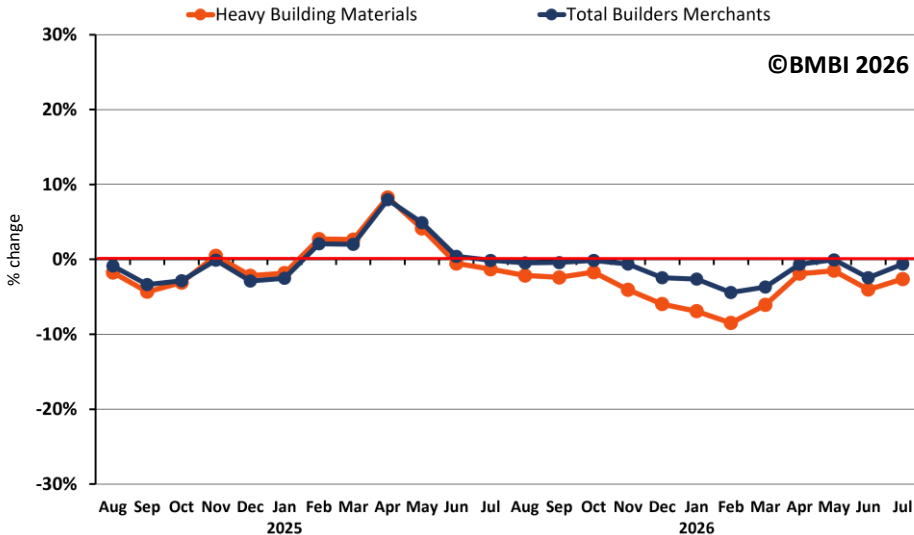
# Monthly Year-on-year

## Heavy Building Materials % change



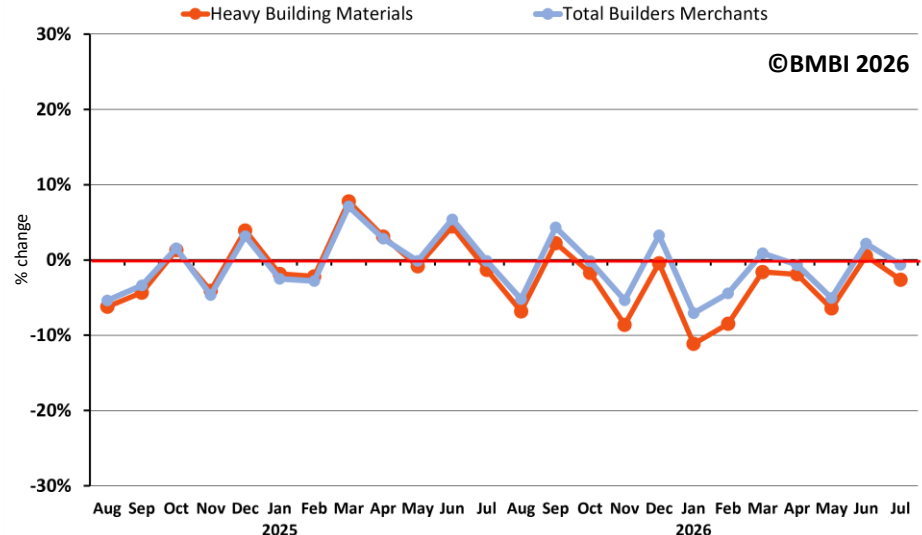
### Like-for-like value sales

Heavy Building Materials - Monthly



### Total (unadjusted) value sales

Heavy Building Materials - Monthly



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

# Monthly Year-on-year

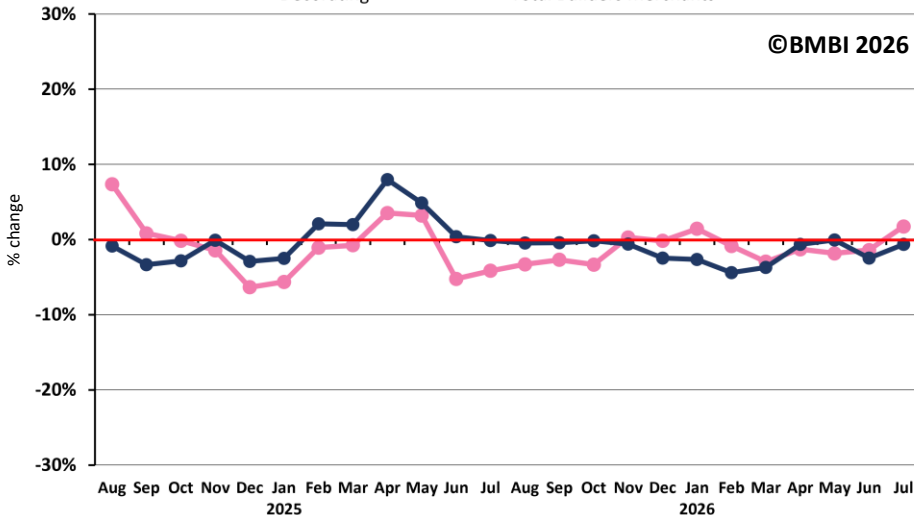
Decorating % change

## Like-for-like value sales

### Decorating - Monthly

Decorating Total Builders Merchants

©BMBI 2026

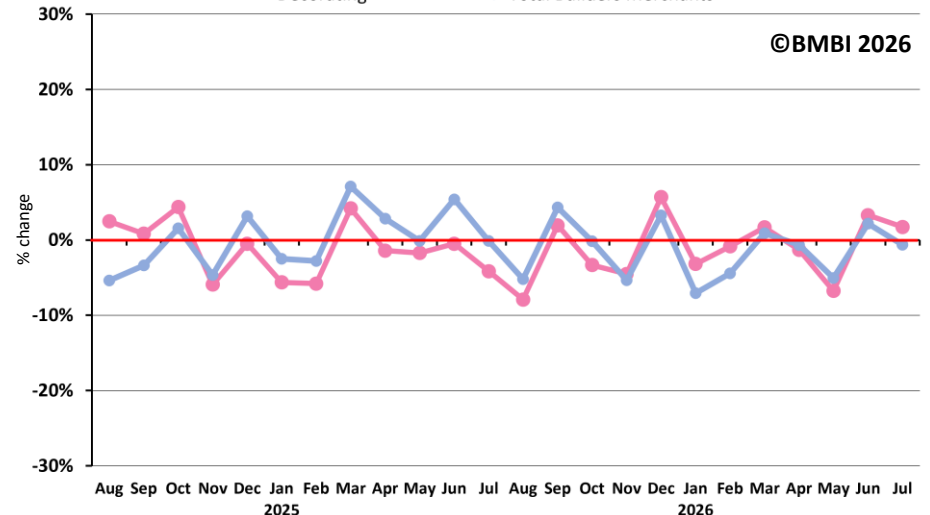


## Total (unadjusted) value sales

### Decorating - Monthly

Decorating Total Builders Merchants

©BMBI 2026



# Monthly Year-on-year

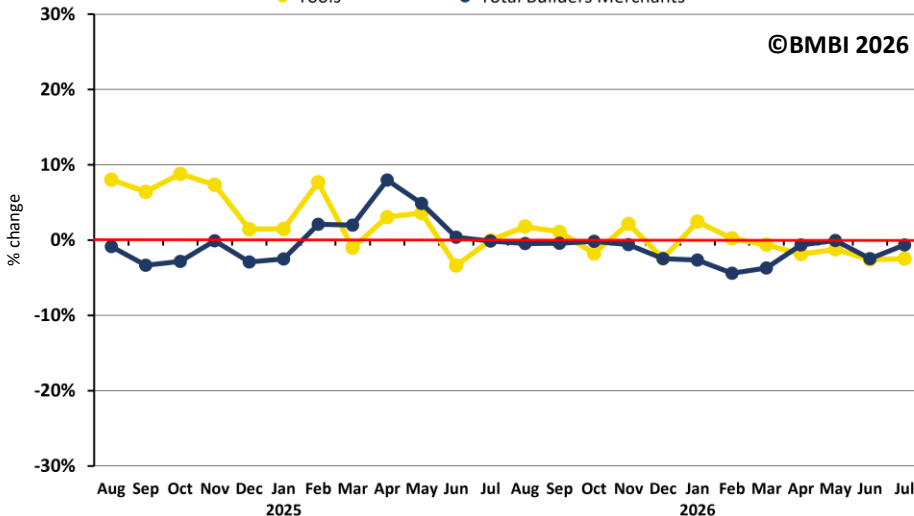
Tools % change

## Like-for-like value sales

Tools - Monthly

Tools Total Builders Merchants

©BMBI 2026

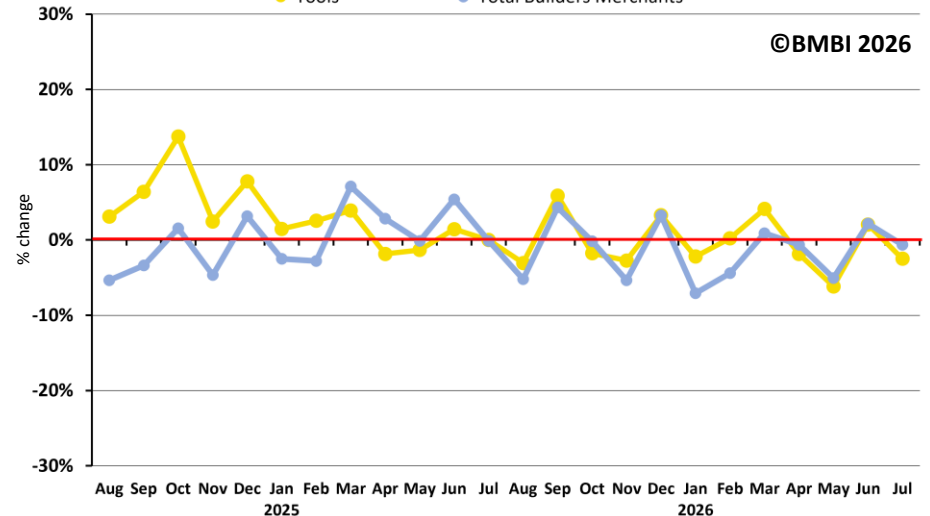


## Total (unadjusted) value sales

Tools - Monthly

Tools Total Builders Merchants

©BMBI 2026

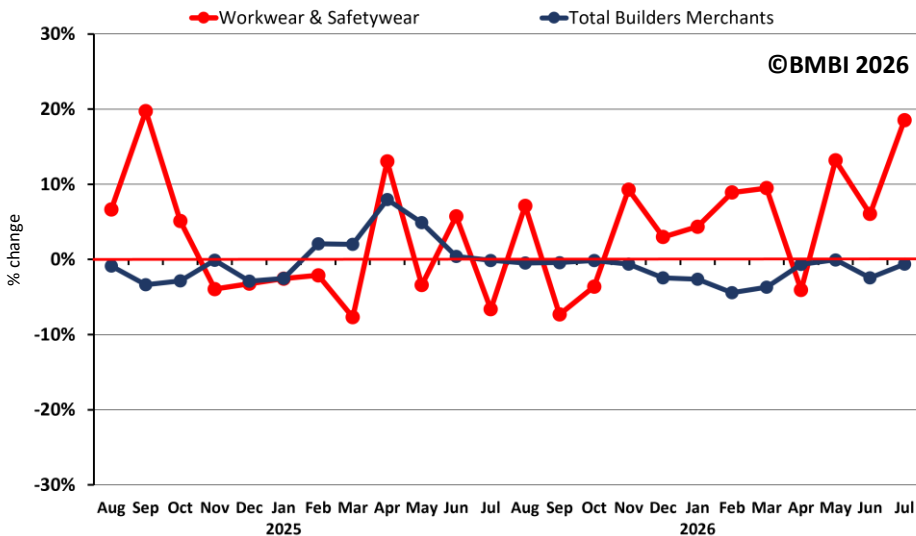


# Monthly Year-on-year

## Workwear & Safetywear % change

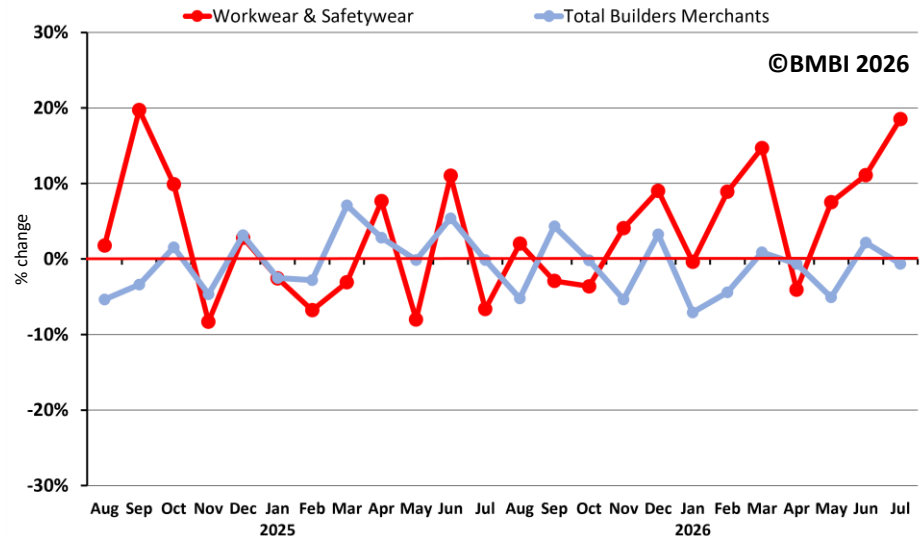
### Like-for-like value sales

Workwear & Safetywear - Monthly



### Total (unadjusted) value sales

Workwear & Safetywear - Monthly



# Monthly Year-on-year

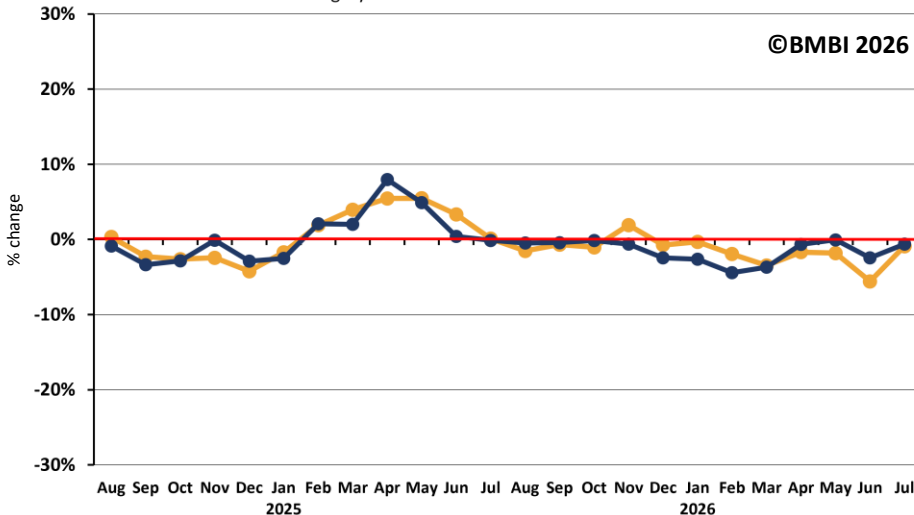
Ironmongery % change

## Like-for-like value sales

### Ironmongery - Monthly

Ironmongery Total Builders Merchants

©BMBI 2026

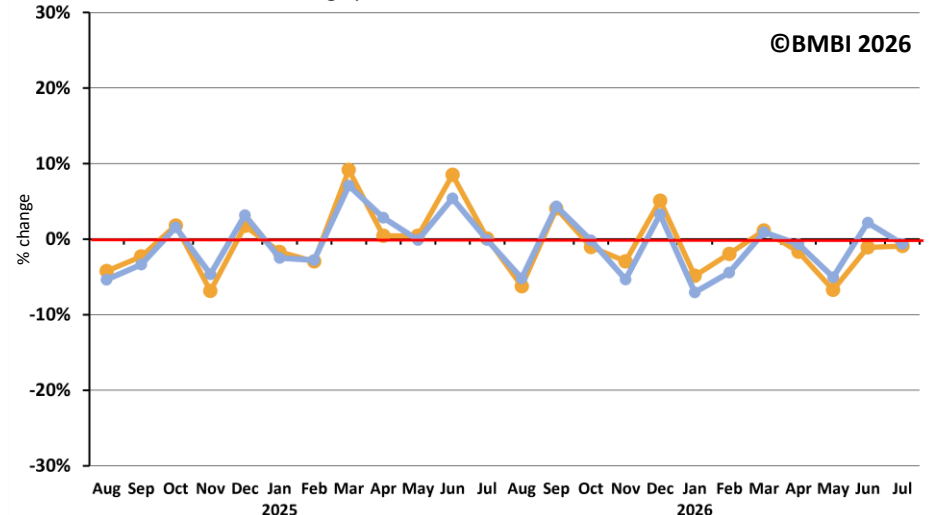


## Total (unadjusted) value sales

### Ironmongery - Monthly

Ironmongery Total Builders Merchants

©BMBI 2026



# Monthly Year-on-year

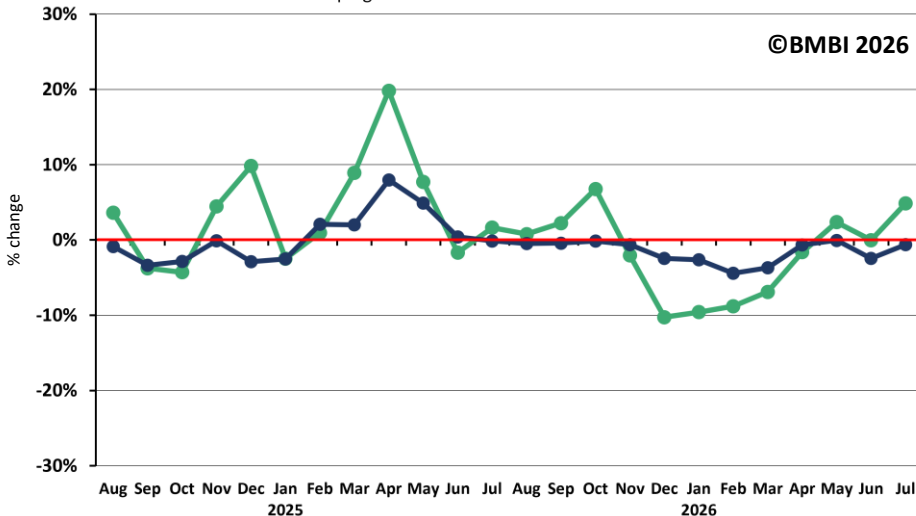
Landscaping % change

## Like-for-like value sales

### Landscaping - Monthly

Landscaping Total Builders Merchants

©BMBI 2026

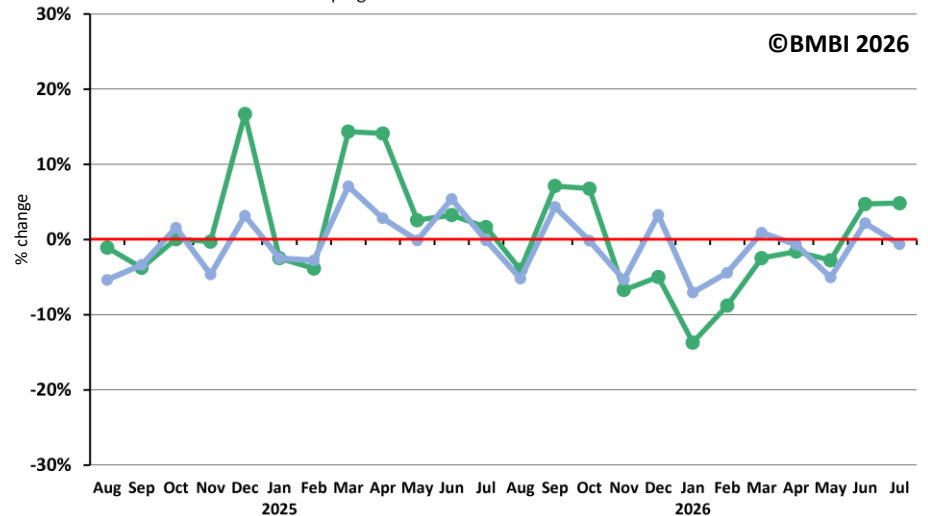


## Total (unadjusted) value sales

### Landscaping - Monthly

Landscaping Total Builders Merchants

©BMBI 2026



# Monthly Year-on-year

Plumbing, Heating & Electrical % change



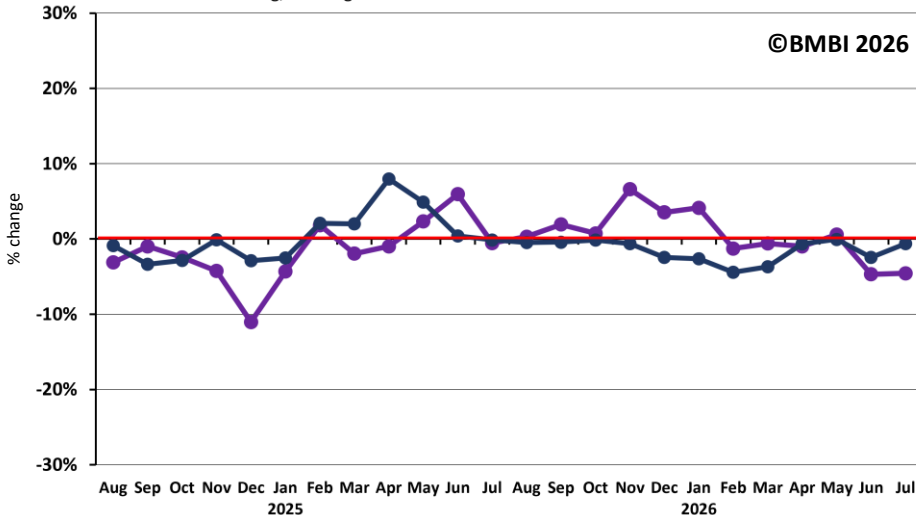
## Like-for-like value sales

### Plumbing, Heating & Electrical - Monthly

Plumbing, Heating & Electrical

Total Builders Merchants

©BMBI 2026



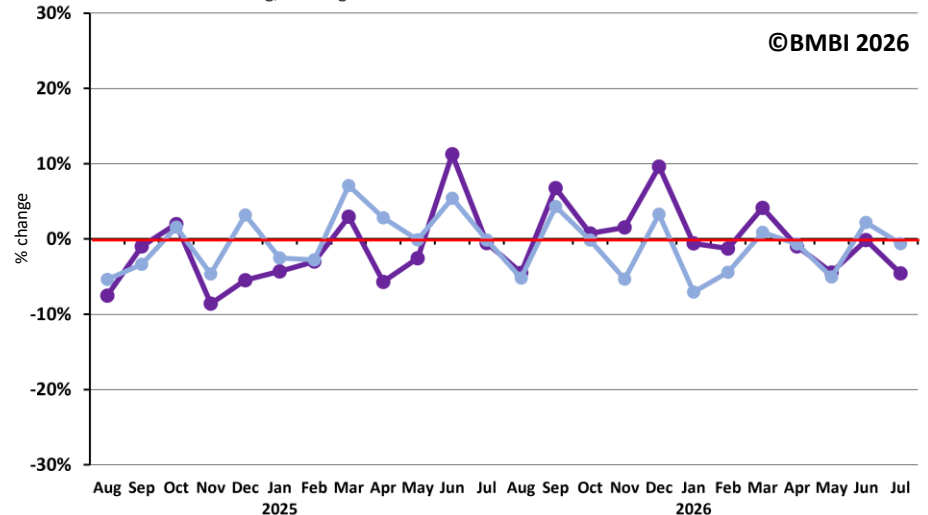
## Total (unadjusted) value sales

### Plumbing, Heating & Electrical - Monthly

Plumbing, Heating & Electrical

Total Builders Merchants

©BMBI 2026



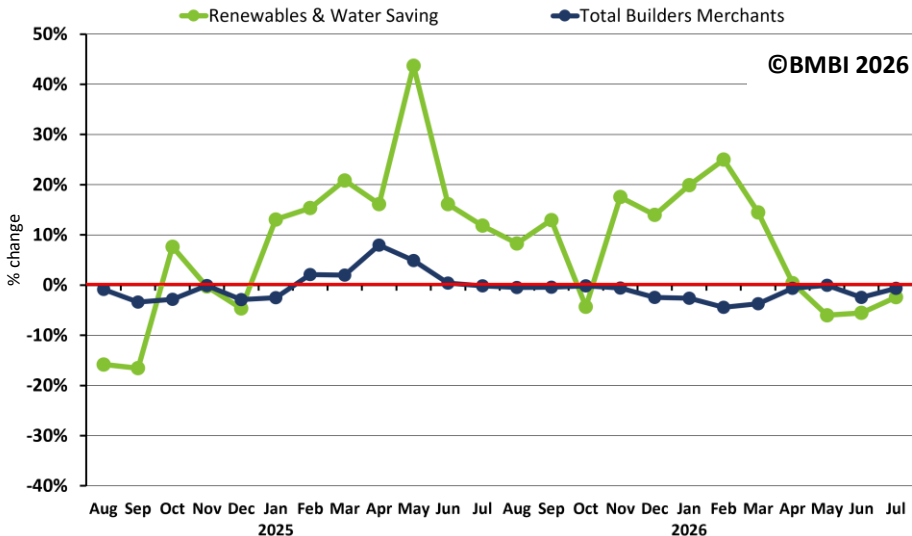
Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to July 2026

# Monthly Year-on-year

Renewables & Water Saving % change

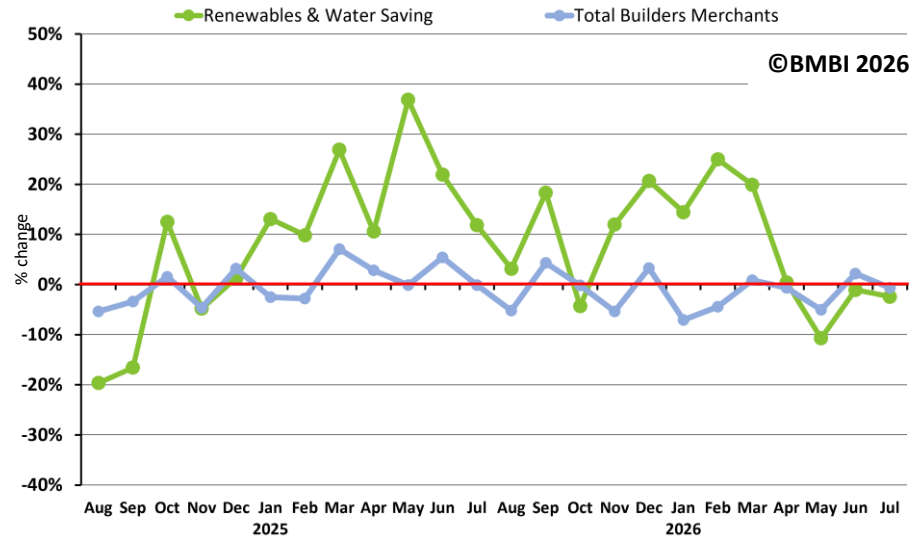
## Like-for-like value sales

Renewables & Water Saving - Monthly



## Total (unadjusted) value sales

Renewables & Water Saving - Monthly

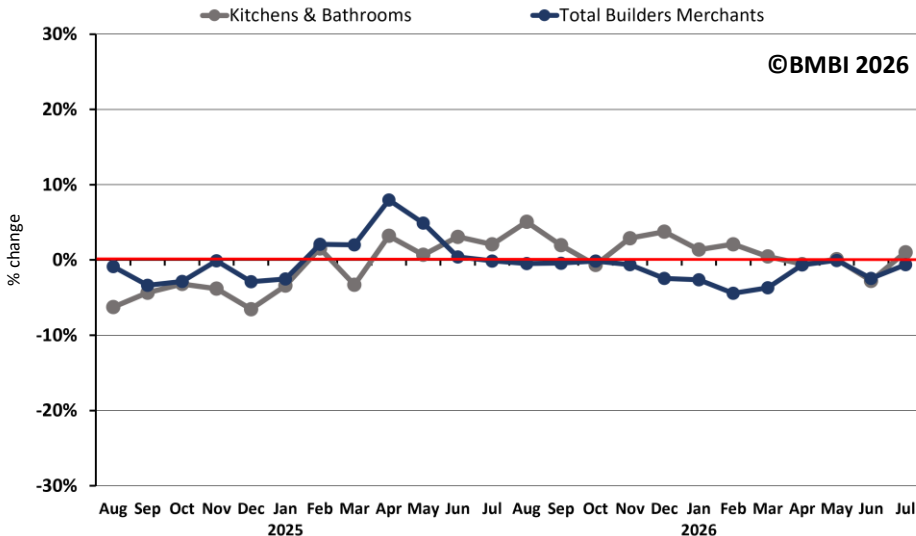


# Monthly Year-on-year

## Kitchens & Bathrooms % change

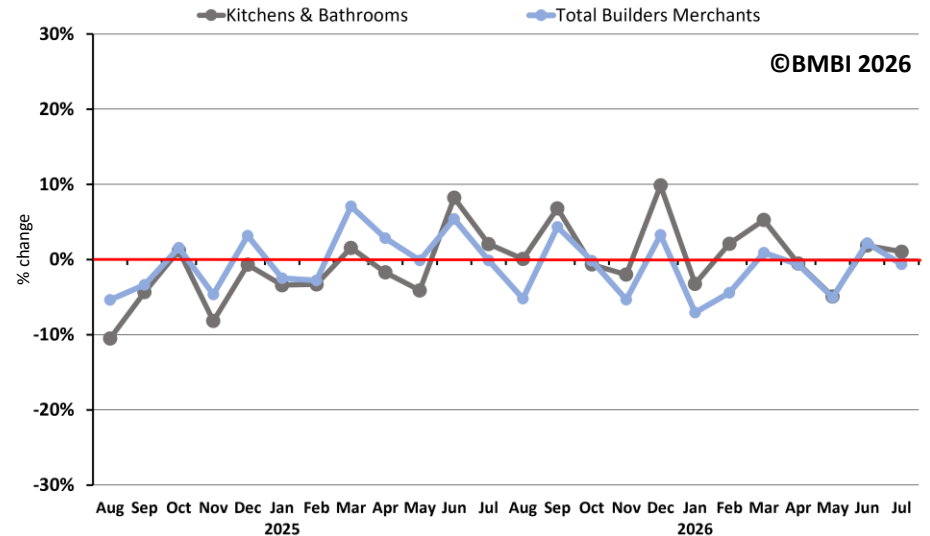
### Like-for-like value sales

#### Kitchens & Bathrooms - Monthly



### Total (unadjusted) value sales

#### Kitchens & Bathrooms - Monthly



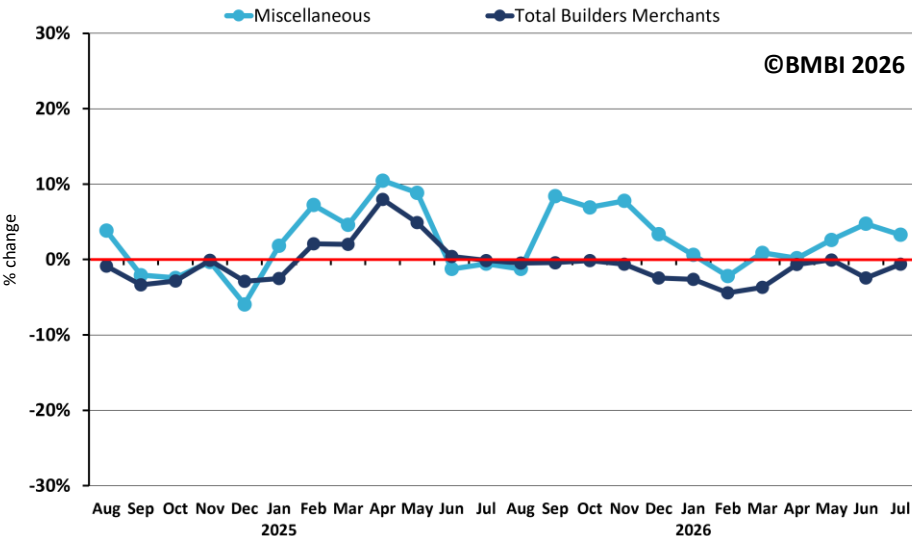
# Monthly Year-on-year

Miscellaneous % change

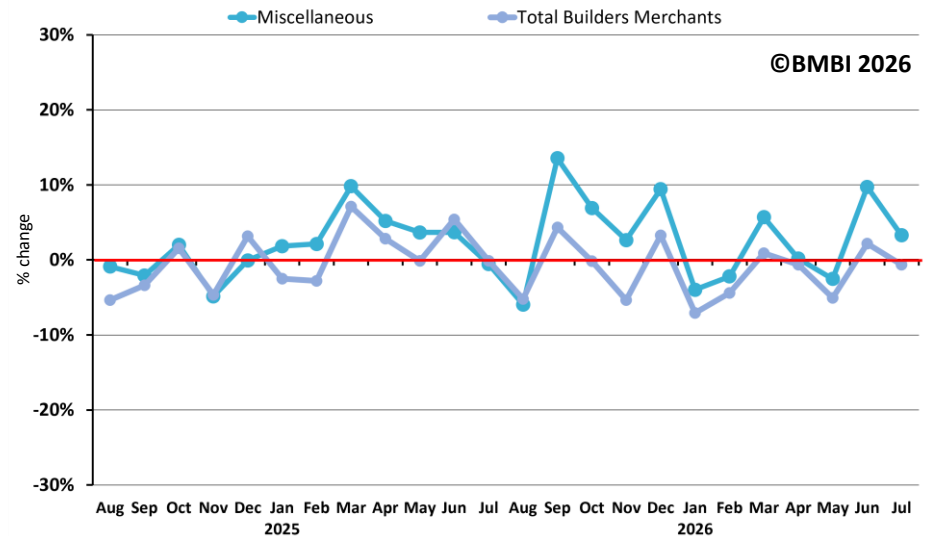
Like-for-like value sales

Total (unadjusted) value sales

Miscellaneous - Monthly



Miscellaneous - Monthly



# Monthly Year-on-year

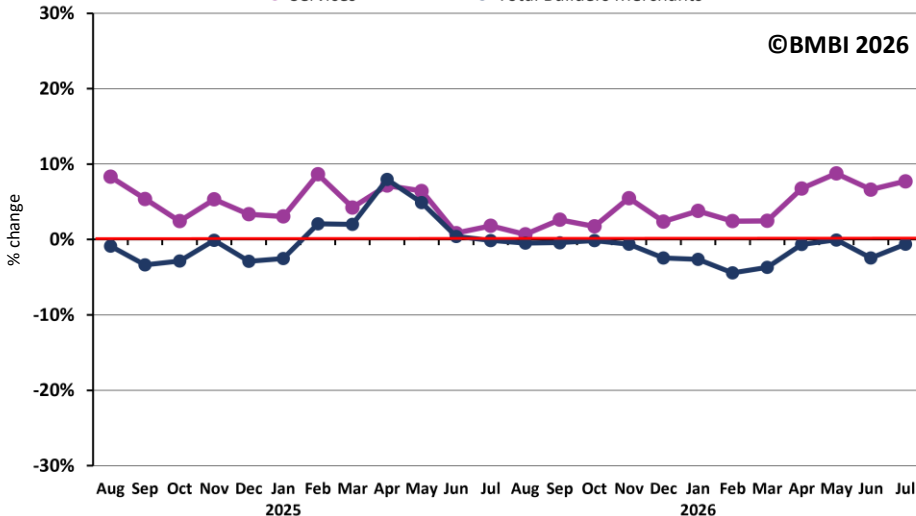
Services % change

## Like-for-like value sales

### Services - Monthly

Services Total Builders Merchants

©BMBI 2026

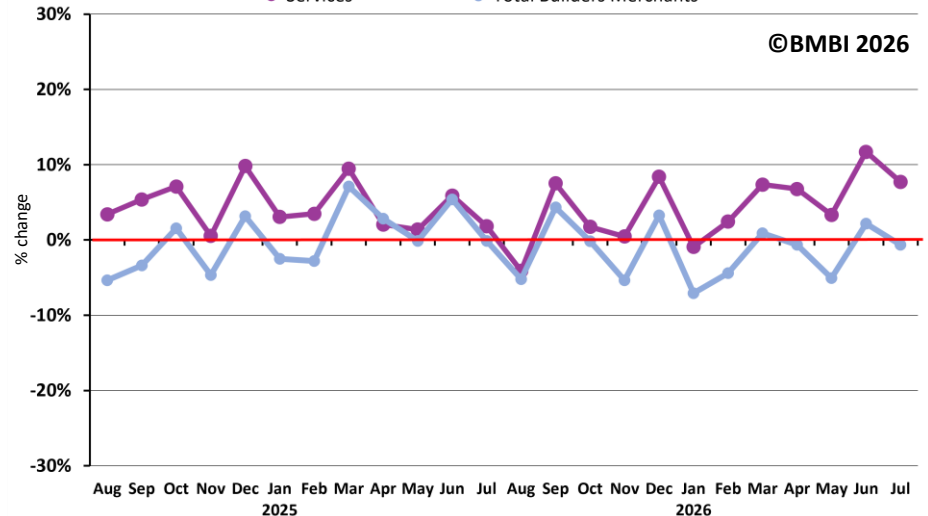


## Total (unadjusted) value sales

### Services - Monthly

Services Total Builders Merchants

©BMBI 2026



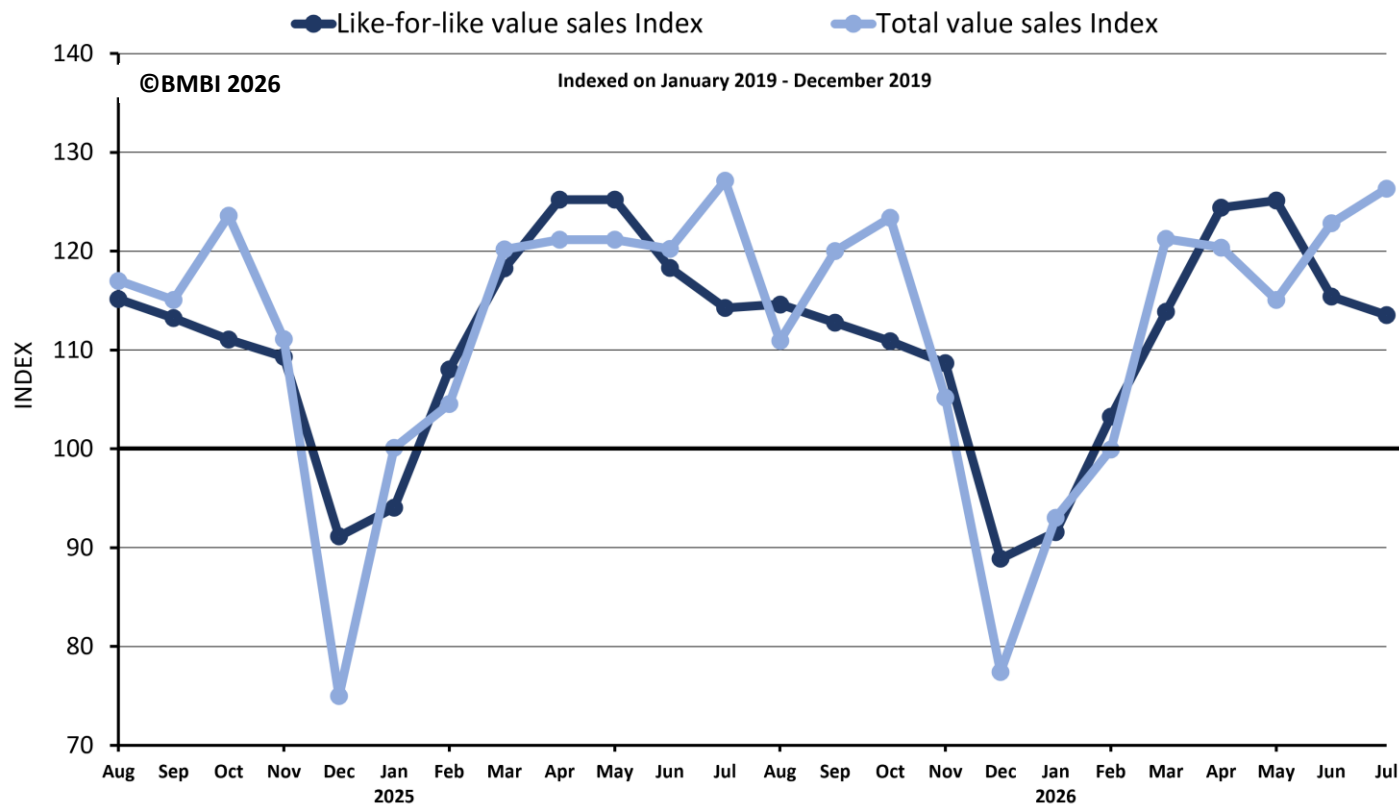
# Monthly: Index

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

23 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 July 2026

July's **like-for-like**  
**value** sales Index  
was 113.5.

# Latest month: Index by category

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

23 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.



### July 2026 Index

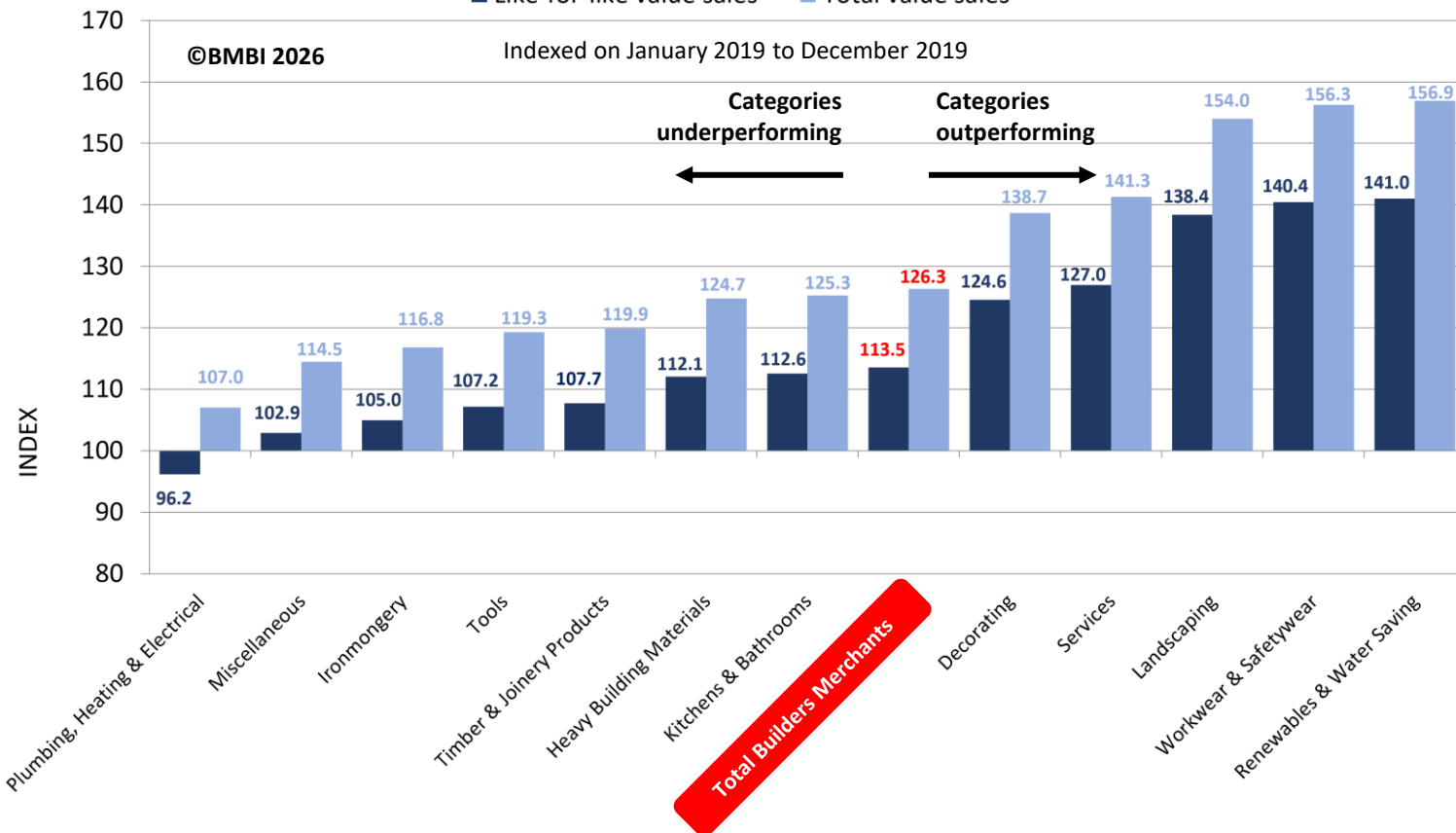
■ Like-for-like value sales ■ Total value sales

©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 July 2026

In like for like value,  
Renewables & Water  
Saving (141.0)  
indexed the highest.

Plumbing, Heating &  
Electrical (96.2)  
indexed the least.

# Monthly: Index by Categories

## Like-for-like value sales

July 2025\* - July 2026

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



| MONTHLY LIKE-FOR-LIKE VALUE<br>SALES INDEX | Index | 2025  |       |       |       |       | 2026  |       |       |       |       |       |       |       |
|--------------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
|                                            |       | Jul   | Aug   | Sep   | Oct   | Nov   | Dec   | Jan   | Feb   | Mar   | Apr   | May   | Jun   | Jul   |
| Total Builders Merchants                   | 100   | 114.2 | 114.6 | 112.7 | 110.9 | 108.7 | 88.9  | 91.6  | 103.2 | 113.9 | 124.4 | 125.1 | 115.4 | 113.5 |
| Timber & Joinery Products                  | 100   | 108.5 | 109.9 | 109.2 | 106.9 | 106.4 | 87.3  | 92.7  | 101.4 | 107.9 | 116.8 | 116.9 | 109.7 | 107.7 |
| Heavy Building Materials                   | 100   | 115.1 | 114.7 | 112.7 | 111.5 | 106.6 | 84.9  | 87.5  | 99.9  | 112.2 | 123.3 | 123.5 | 113.9 | 112.1 |
| Decorating                                 | 100   | 122.5 | 124.9 | 122.0 | 119.6 | 121.5 | 103.4 | 105.1 | 115.9 | 123.8 | 130.2 | 131.8 | 123.3 | 124.6 |
| Tools                                      | 100   | 109.9 | 112.7 | 114.1 | 115.1 | 118.1 | 95.9  | 103.5 | 114.7 | 119.0 | 119.8 | 119.2 | 108.8 | 107.2 |
| Workwear & Safetywear                      | 100   | 118.5 | 126.9 | 134.9 | 140.3 | 161.1 | 131.6 | 141.9 | 149.3 | 144.7 | 141.1 | 146.2 | 135.6 | 140.4 |
| Ironmongery                                | 100   | 106.0 | 104.1 | 104.7 | 104.2 | 105.6 | 91.2  | 97.8  | 103.3 | 107.5 | 111.4 | 111.0 | 103.2 | 105.0 |
| Landscaping                                | 100   | 132.0 | 130.2 | 115.2 | 107.1 | 92.2  | 70.4  | 69.9  | 89.3  | 124.1 | 158.3 | 166.6 | 142.4 | 138.4 |
| Plumbing, Heating & Electrical             | 100   | 100.8 | 100.3 | 111.3 | 115.5 | 124.7 | 108.8 | 114.0 | 118.2 | 115.8 | 109.1 | 108.1 | 101.2 | 96.2  |
| Renewables & Water Saving                  | 100   | 144.5 | 142.2 | 145.8 | 146.4 | 163.7 | 142.0 | 154.2 | 182.6 | 178.3 | 155.8 | 147.2 | 143.1 | 141.0 |
| Kitchens & Bathrooms                       | 100   | 111.4 | 115.0 | 118.6 | 111.9 | 123.6 | 103.2 | 104.2 | 119.6 | 116.4 | 119.8 | 117.4 | 115.3 | 112.6 |
| Miscellaneous                              | 100   | 99.6  | 97.5  | 102.8 | 106.8 | 108.9 | 94.7  | 100.2 | 106.4 | 108.5 | 109.2 | 110.9 | 103.2 | 102.9 |
| Services                                   | 100   | 117.9 | 121.9 | 116.2 | 115.8 | 118.2 | 113.1 | 100.5 | 115.9 | 124.7 | 135.4 | 136.2 | 126.3 | 127.0 |

\*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 July 2026

# Monthly: Index by Categories

Total value sales

July 2025\* - July 2026

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



|                                 |       | 2025  |       |       |       |       |       | 2026  |       |       |       |       |       |       |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| MONTHLY TOTAL VALUE SALES INDEX | Index | Jul   | Aug   | Sep   | Oct   | Nov   | Dec   | Jan   | Feb   | Mar   | Apr   | May   | Jun   | Jul   |
| Total Builders Merchants        | 100   | 127.1 | 110.9 | 120.0 | 123.4 | 105.2 | 77.4  | 93.0  | 99.9  | 121.2 | 120.4 | 115.1 | 122.8 | 126.3 |
| Timber & Joinery Products       | 100   | 120.8 | 106.3 | 116.2 | 118.9 | 102.9 | 76.0  | 94.2  | 98.1  | 114.8 | 113.0 | 107.5 | 116.8 | 119.9 |
| Heavy Building Materials        | 100   | 128.1 | 111.0 | 119.9 | 124.1 | 103.1 | 73.9  | 88.9  | 96.6  | 119.5 | 119.3 | 113.5 | 121.2 | 124.7 |
| Decorating                      | 100   | 136.3 | 120.8 | 129.9 | 133.1 | 117.6 | 90.1  | 106.8 | 112.2 | 131.8 | 126.0 | 121.1 | 131.3 | 138.7 |
| Tools                           | 100   | 122.3 | 109.0 | 121.4 | 128.1 | 114.3 | 83.5  | 105.2 | 111.0 | 126.7 | 116.0 | 109.6 | 115.8 | 119.3 |
| Workwear & Safetywear           | 100   | 131.9 | 122.8 | 143.6 | 156.1 | 155.9 | 114.6 | 144.2 | 144.5 | 154.1 | 136.5 | 134.5 | 144.4 | 156.3 |
| Ironmongery                     | 100   | 117.9 | 100.8 | 111.5 | 116.0 | 102.2 | 79.4  | 99.4  | 100.0 | 114.5 | 107.8 | 102.1 | 109.8 | 116.8 |
| Landscaping                     | 100   | 146.9 | 126.0 | 122.6 | 119.2 | 89.2  | 61.3  | 71.1  | 86.4  | 132.1 | 153.2 | 153.2 | 151.6 | 154.0 |
| Plumbing, Heating & Electrical  | 100   | 112.2 | 97.1  | 118.5 | 128.6 | 120.7 | 94.8  | 115.8 | 114.4 | 123.2 | 105.6 | 99.4  | 107.8 | 107.0 |
| Renewables & Water Saving       | 100   | 160.8 | 137.6 | 155.2 | 162.9 | 158.4 | 123.6 | 156.7 | 176.7 | 189.8 | 150.8 | 135.3 | 152.3 | 156.9 |
| Kitchens & Bathrooms            | 100   | 124.0 | 111.3 | 126.2 | 124.5 | 119.6 | 89.9  | 105.8 | 115.8 | 123.9 | 115.9 | 107.9 | 122.8 | 125.3 |
| Miscellaneous                   | 100   | 110.9 | 94.4  | 109.4 | 118.8 | 105.4 | 82.5  | 101.9 | 103.0 | 115.6 | 105.7 | 102.0 | 109.9 | 114.5 |
| Services                        | 100   | 131.2 | 118.0 | 123.7 | 128.9 | 114.3 | 98.5  | 102.1 | 112.1 | 132.7 | 131.0 | 125.2 | 134.4 | 141.3 |

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

**NIQ** **GfK**

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

# Trading Days

## Monthly

Index: 20.7

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

## Quarterly

Index: 62

| 2024     |          |          |          | 2024      |           | 2024 |
|----------|----------|----------|----------|-----------|-----------|------|
| Q1<br>63 | Q2<br>62 | Q3<br>65 | Q4<br>61 | H1<br>125 | H2<br>126 | 251  |
| 2025     |          |          |          | 2025      |           | 2025 |
| Q1<br>63 | Q2<br>61 | Q3<br>65 | Q4<br>61 | H1<br>124 | H2<br>126 | 250  |
| 2026     |          |          |          | 2026      |           | 2026 |
| Q1<br>63 | Q2<br>61 | Q3       | Q4       | H1<br>124 | H2        |      |

# NiQ GfK's Definition of Builders Merchant Panel



## Generalist Builders Merchants definition:

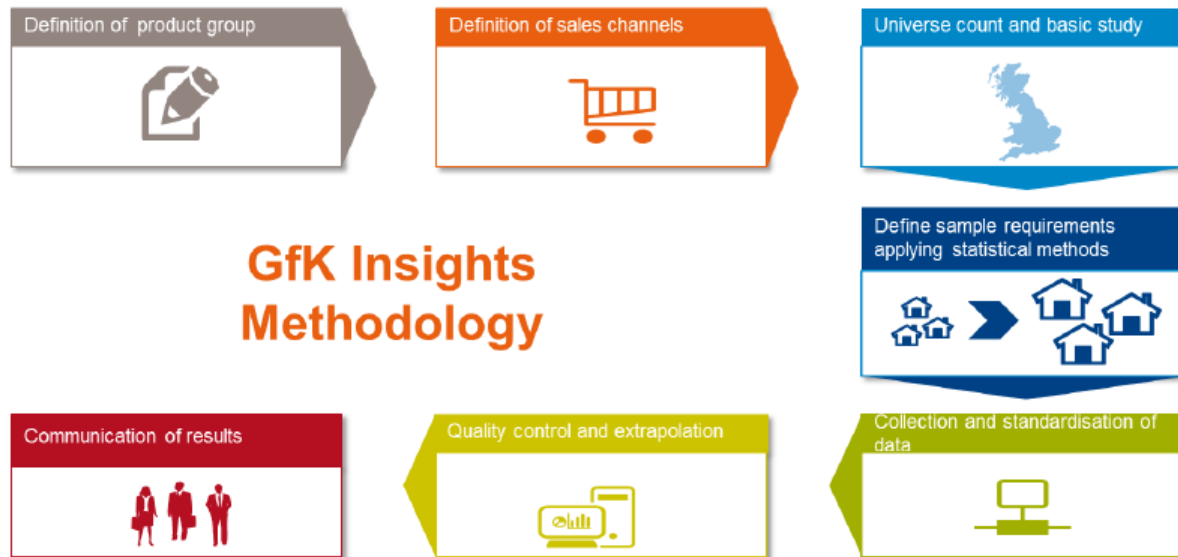
- Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end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