

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)



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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 Builders Merchant Building Index Summary for August [here](#).

Update on web
first then paste
link

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 (BMBI) for 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 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.

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



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%.

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	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (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%
Total Builders Merchants	-0.6%	-7.6%	+7.6%
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%

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 (GBP % change)	Total volume sales (Units % change)	Price (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%
Total Builders Merchants	-1.5%	-5.0%	+3.7%
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 (GBP % change)	Total volume sales (Units % change)	Price (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%
Total Builders Merchants	-1.9%	-7.4%	+5.9%
Ironmongery	-2.2%	+0.2%	-2.5%
Heavy Building Materials	-4.3%	-10.5%	+7.0%

Latest month v last year

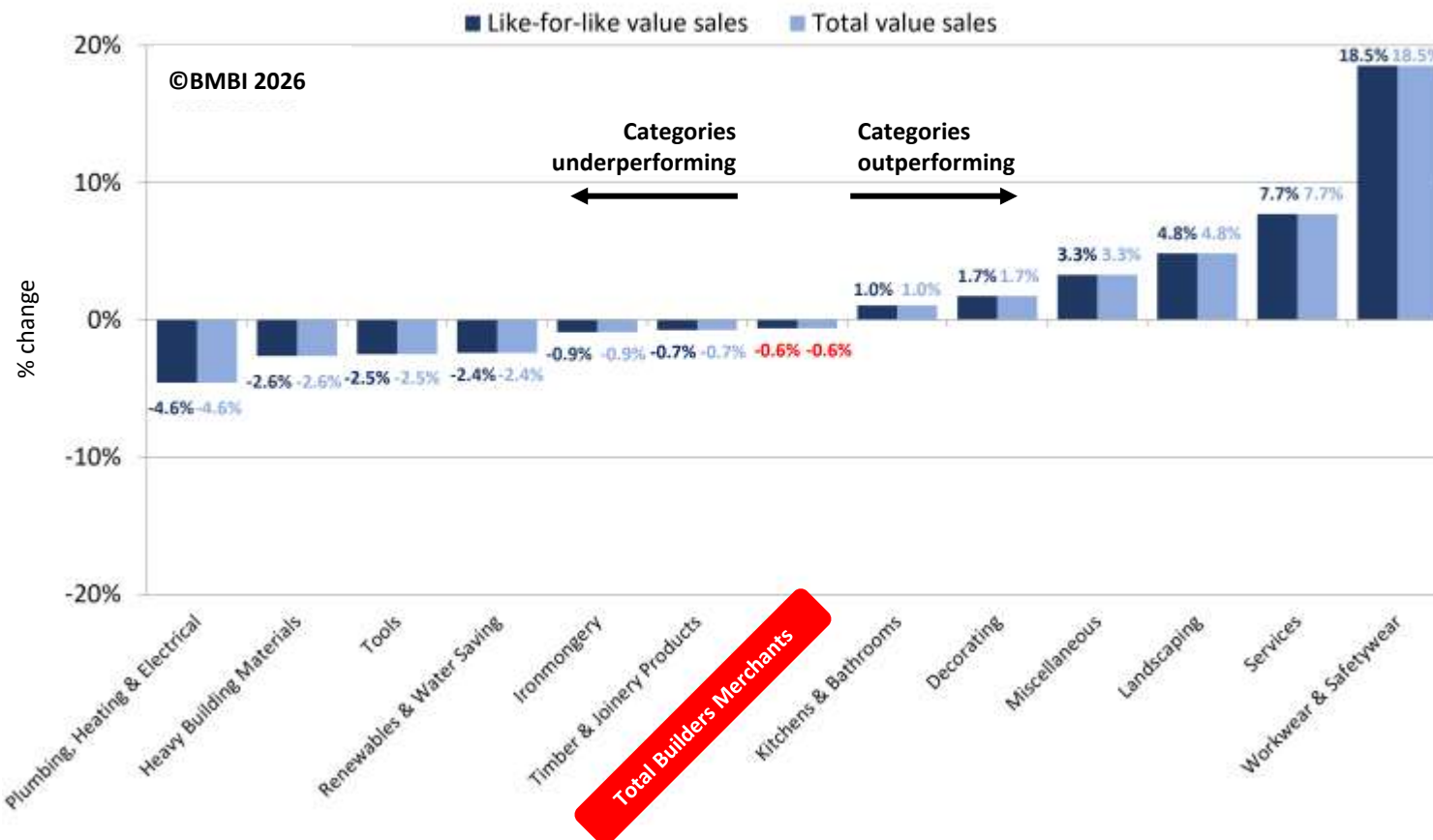
Like-for-like value sales and Total value sales % change

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.

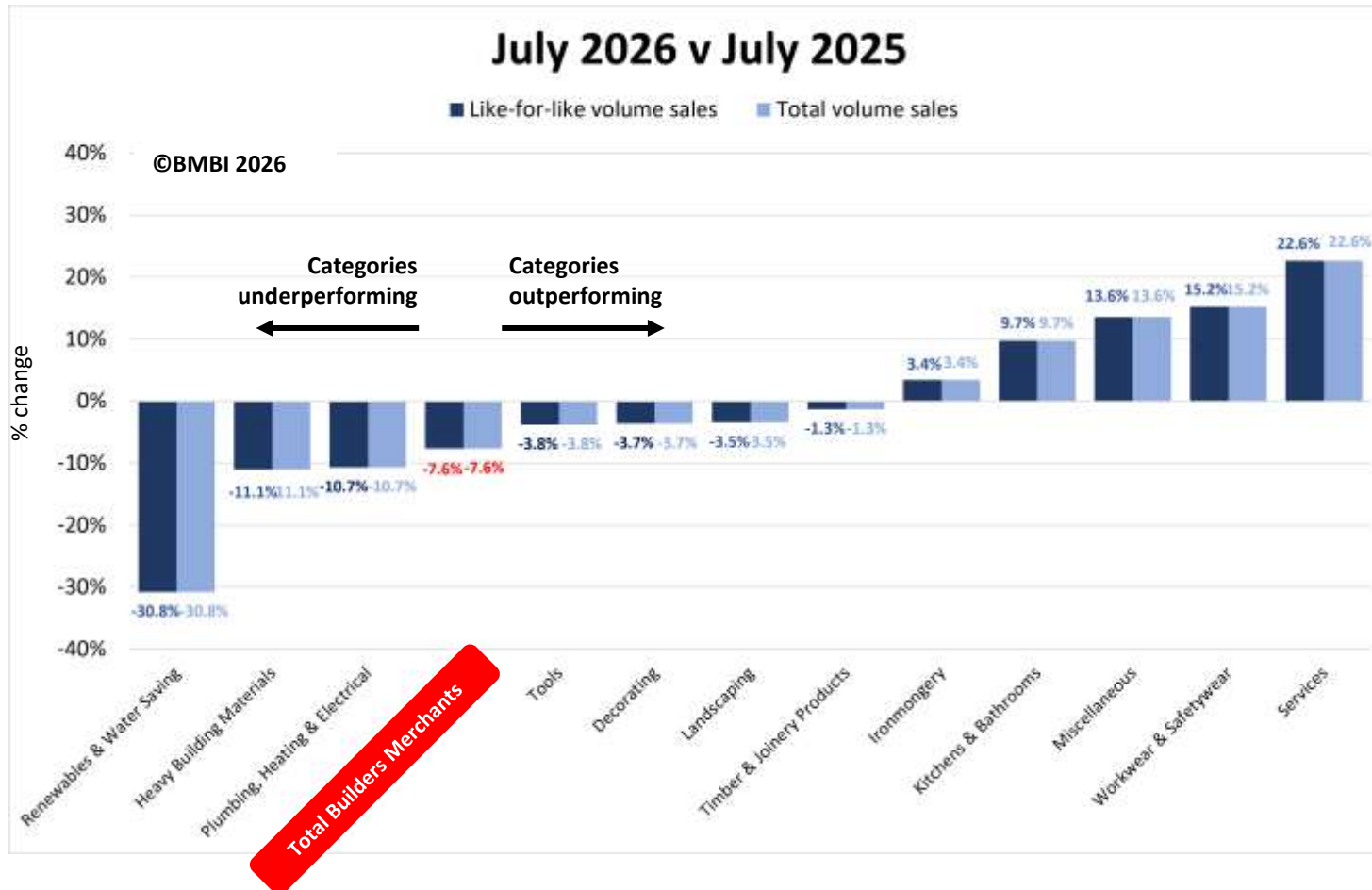
Like-for-like volume sales were down -7.6%.
Prices were up +7.6%.

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.



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



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).

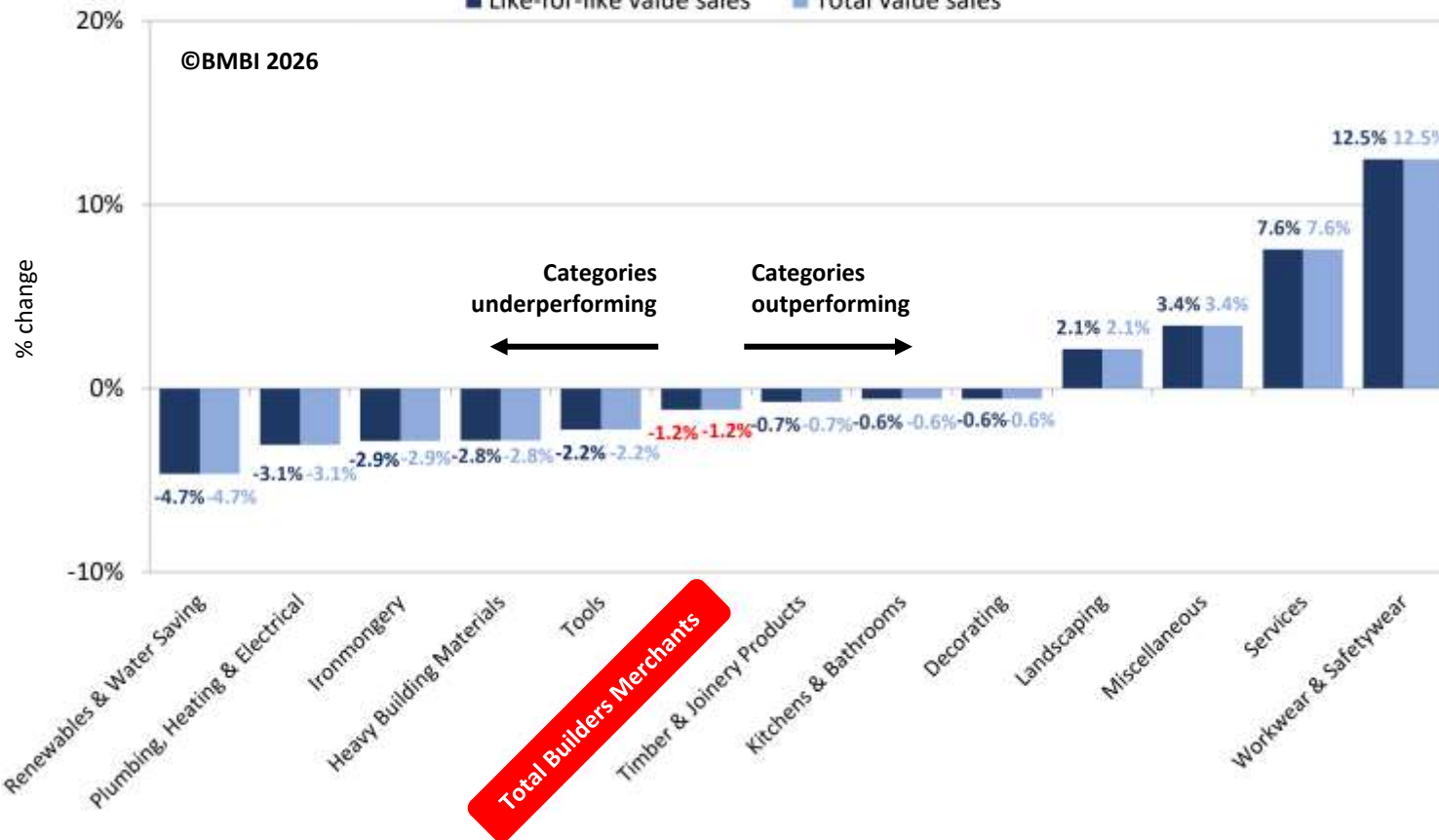
Like-for-like sales are adjusted to remove the effect of trading day differences.



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

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

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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%.

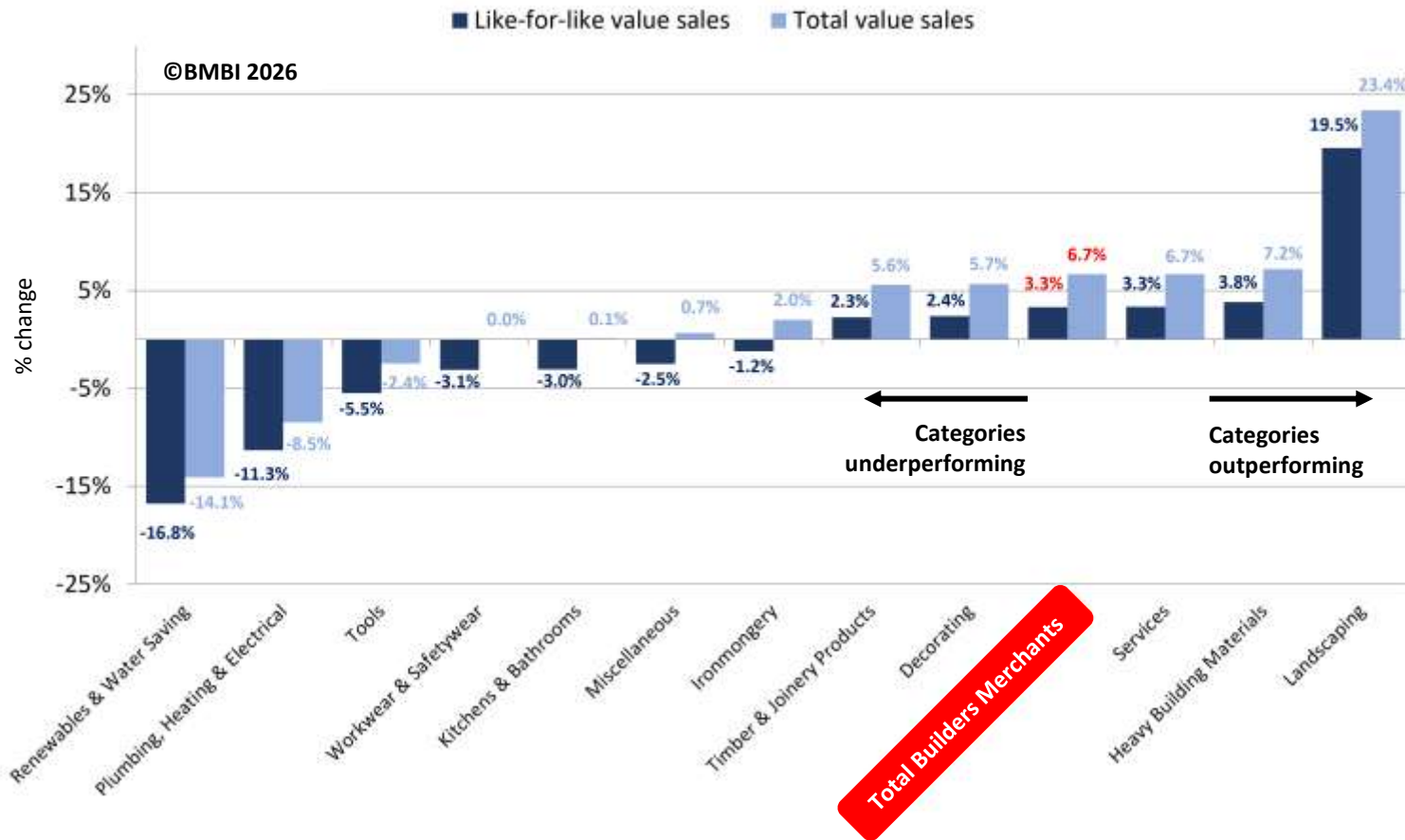
Latest 3 months v previous 3 months

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

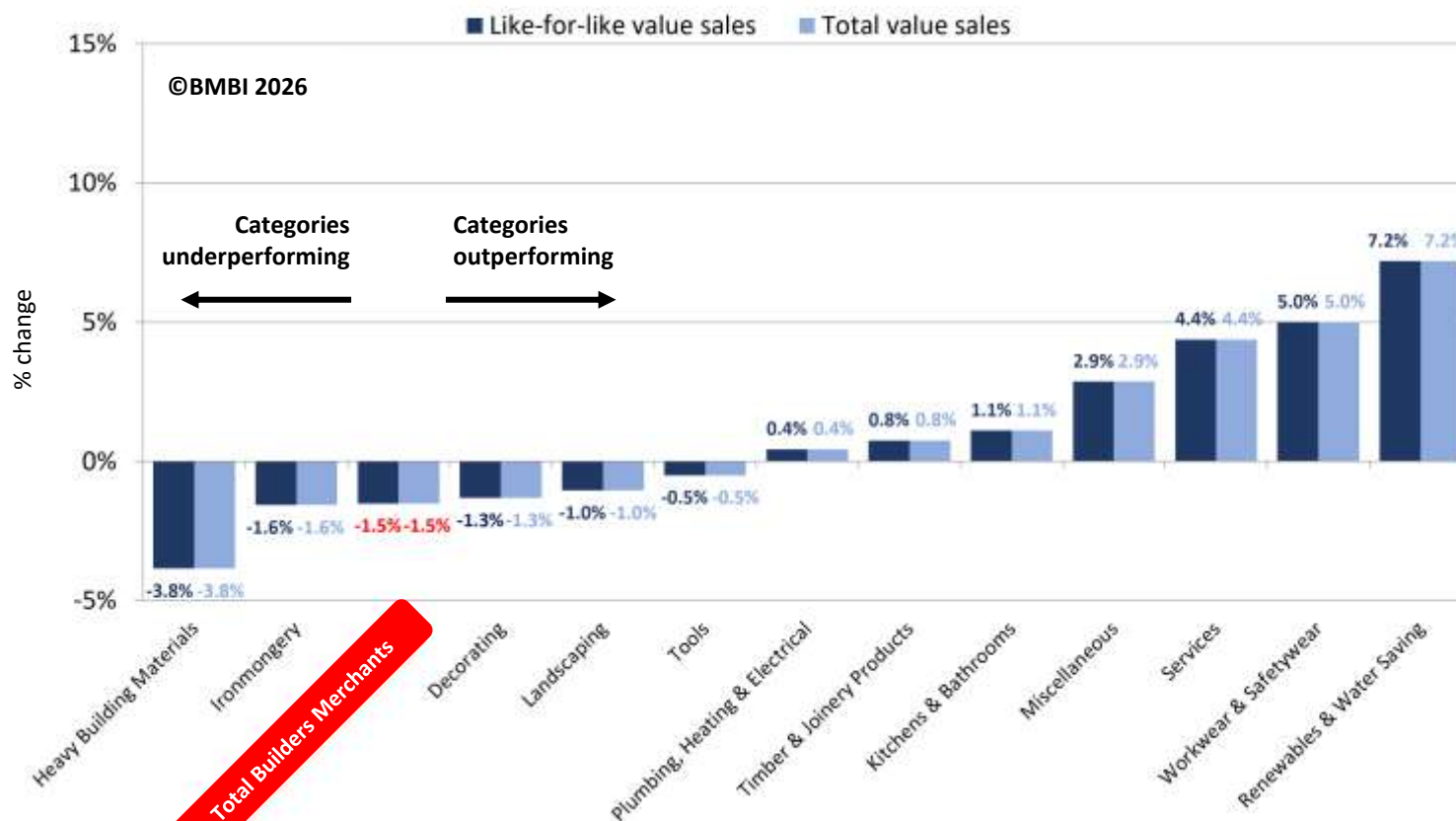
Like-for-like value sales and Total value sales % change



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

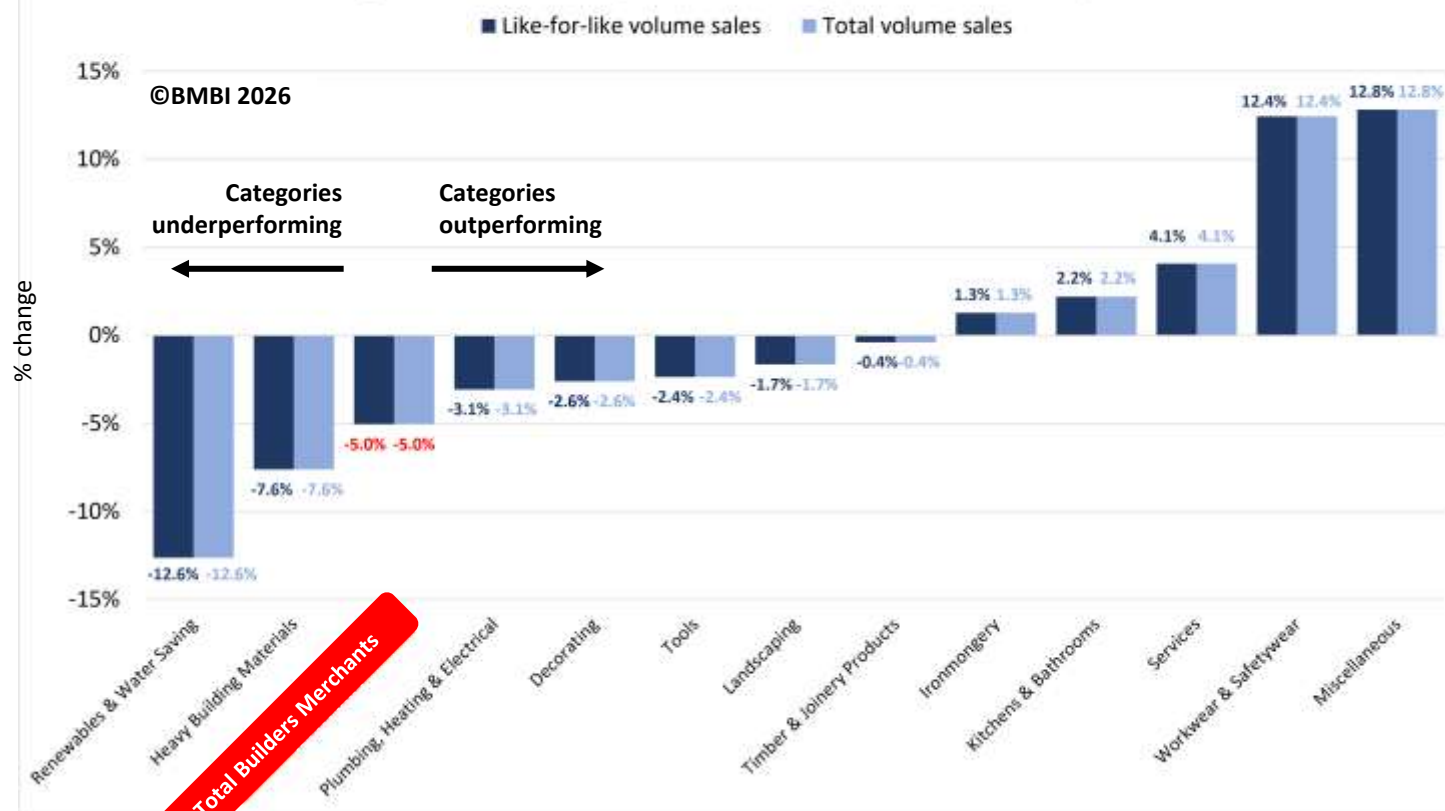
Like-for-like volume sales and Total volume sales % change



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



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



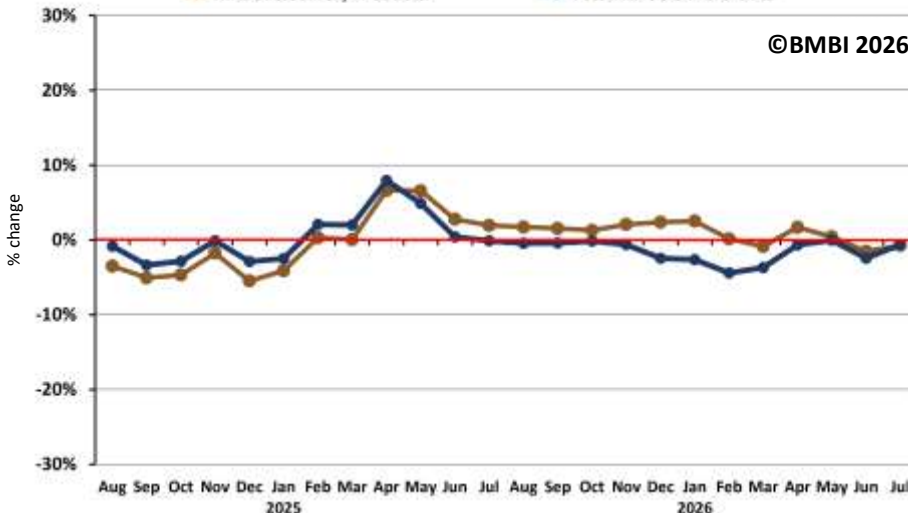
Like-for-like value sales

Total (unadjusted) value sales

Timber & Joinery Products - Monthly

Timber & Joinery Products Total Builders Merchants

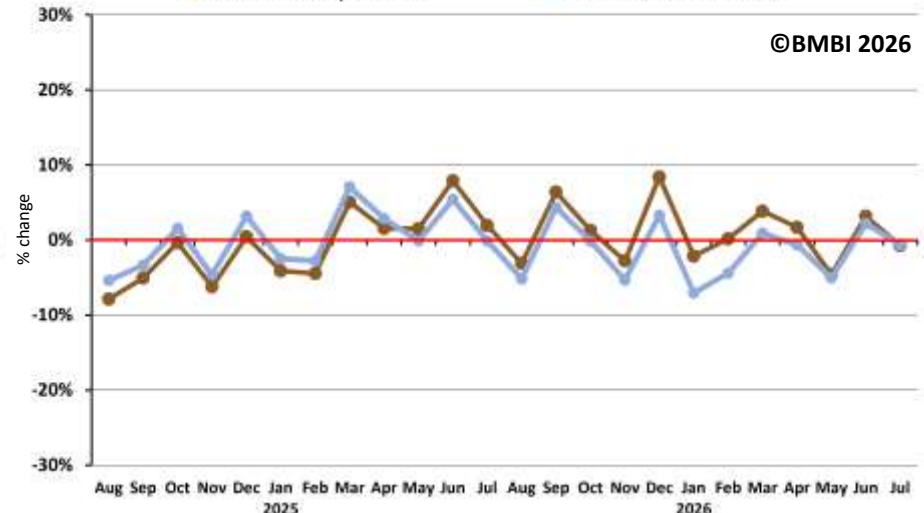
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Timber & Joinery Products - Monthly

Timber & Joinery Products Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

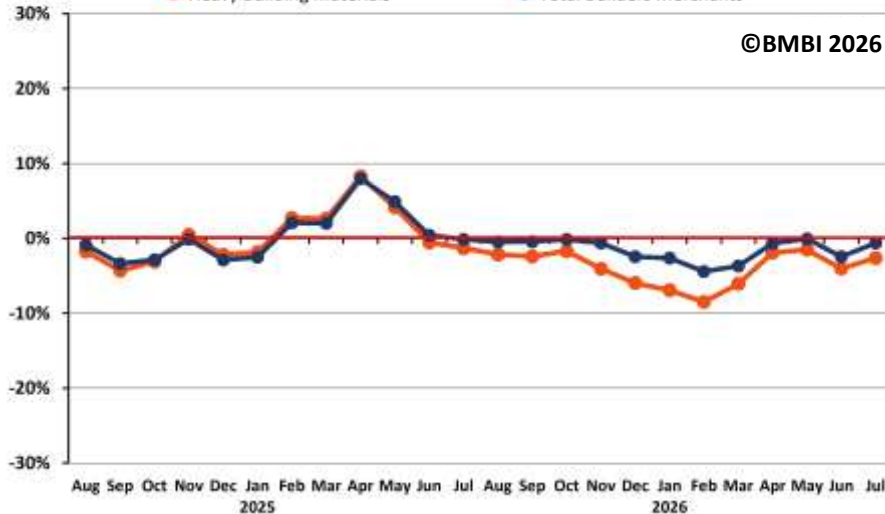
Heavy Building Materials % change



Like-for-like value sales

Heavy Building Materials - Monthly

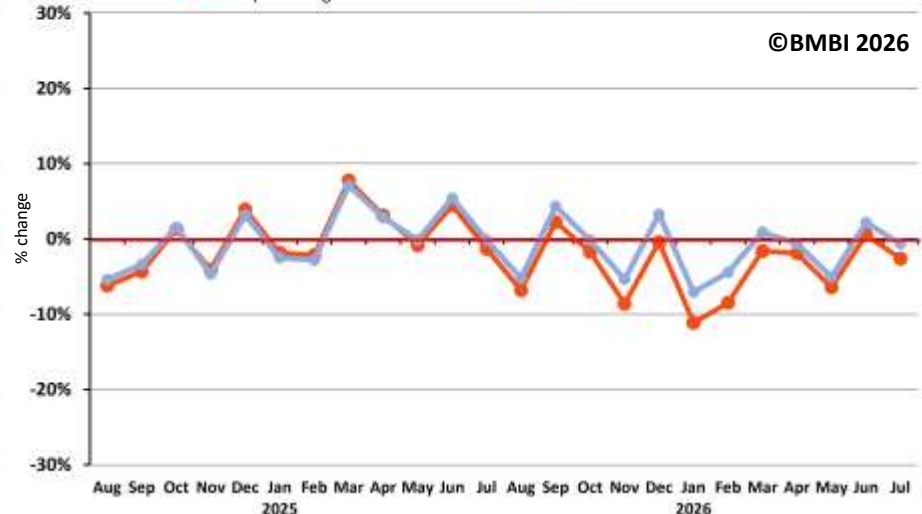
Heavy Building Materials Total Builders Merchants



Total (unadjusted) value sales

Heavy Building Materials - Monthly

Heavy Building Materials Total Builders Merchants



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

Monthly Year-on-year

Decorating % change



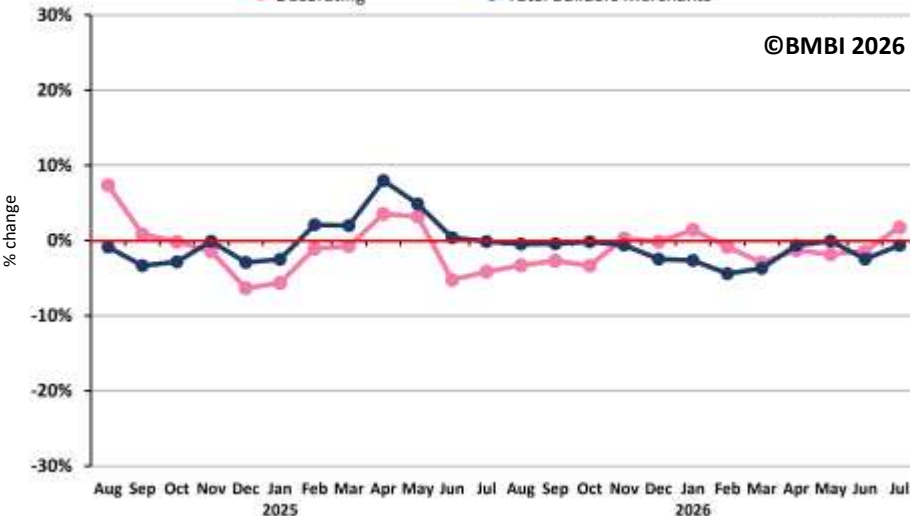
Like-for-like value sales

Total (unadjusted) value sales

Decorating - Monthly

Decorating Total Builders Merchants

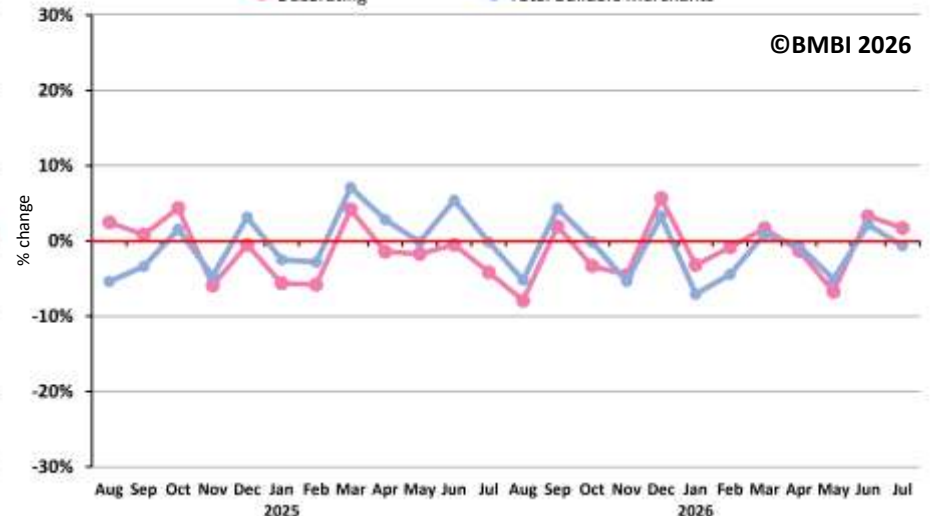
©BMBI 2026



Decorating - Monthly

Decorating Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Tools % change



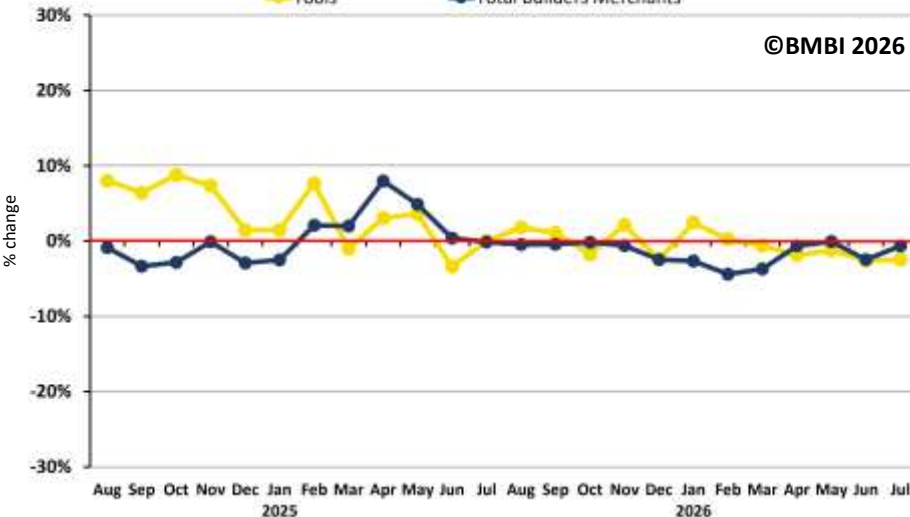
Like-for-like value sales

Total (unadjusted) value sales

Tools - Monthly

Tools Total Builders Merchants

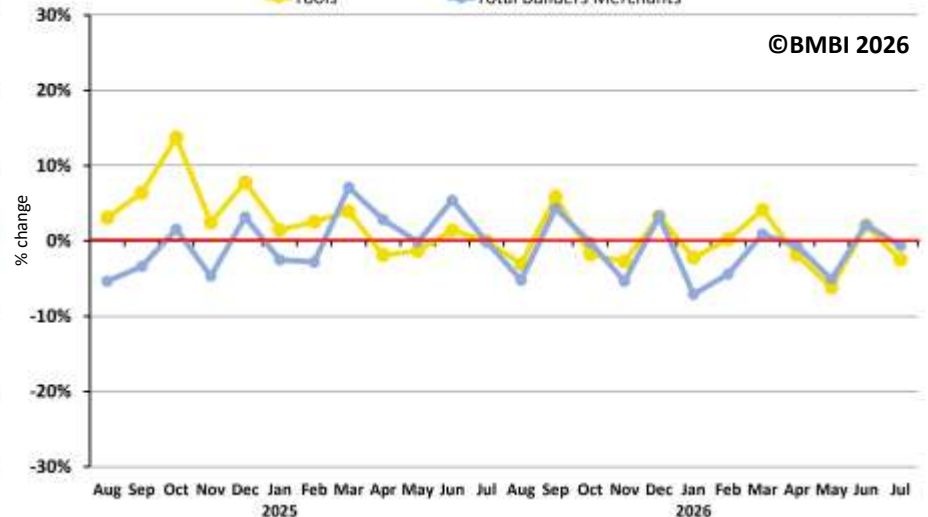
©BMBI 2026



Tools - Monthly

Tools Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Workwear & Safetywear % change



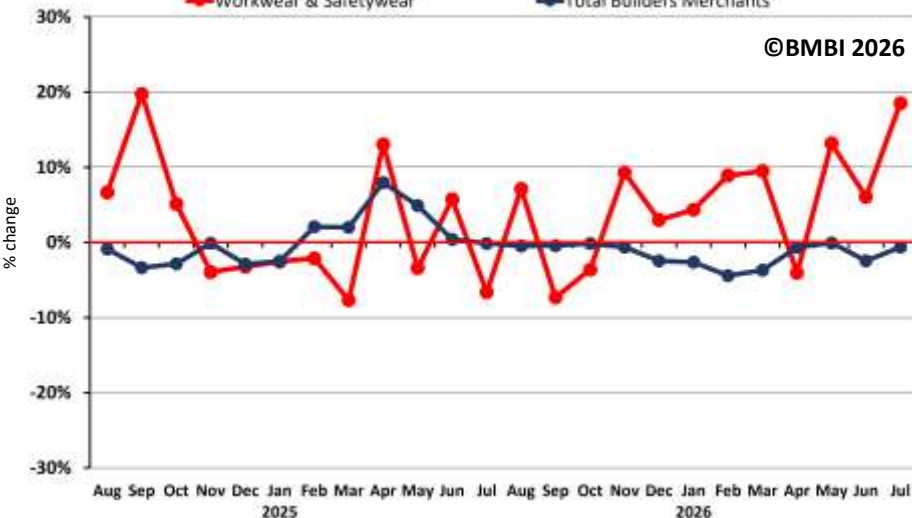
Like-for-like value sales

Total (unadjusted) value sales

Workwear & Safetywear - Monthly

Workwear & Safetywear Total Builders Merchants

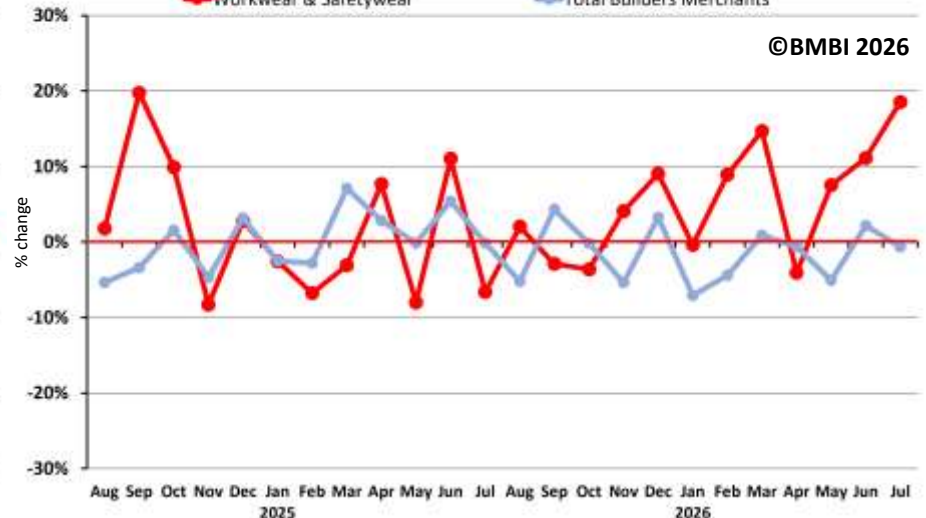
©BMBI 2026



Workwear & Safetywear - Monthly

Workwear & Safetywear Total Builders Merchants

©BMBI 2026



NIQ GfK

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

Monthly Year-on-year

Ironmongery % change



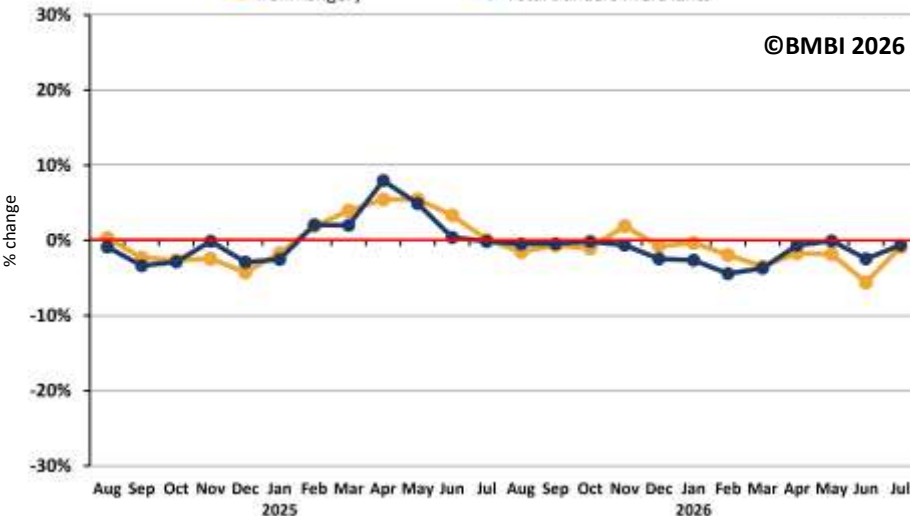
Like-for-like value sales

Total (unadjusted) value sales

Ironmongery - Monthly

Ironmongery Total Builders Merchants

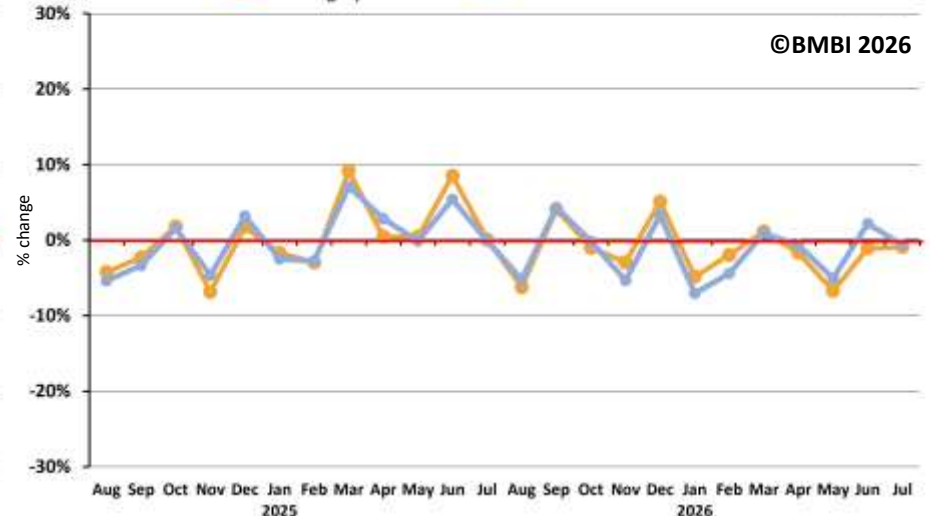
©BMBI 2026



Ironmongery - Monthly

Ironmongery Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Landscaping % change



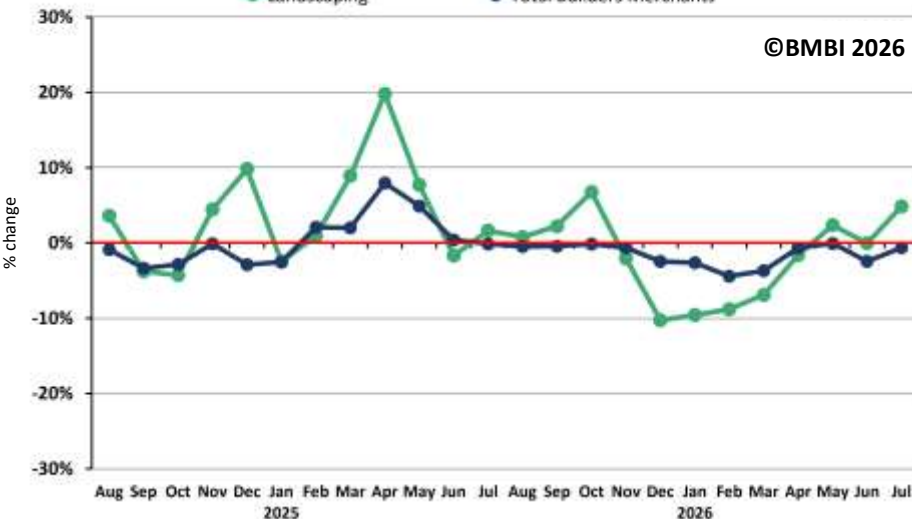
Like-for-like value sales

Total (unadjusted) value sales

Landscaping - Monthly

Landscaping Total Builders Merchants

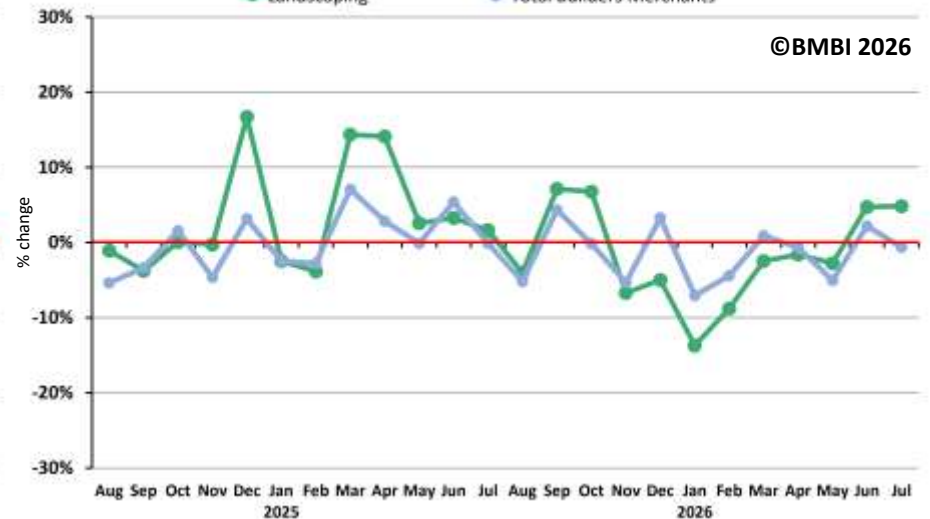
©BMBI 2026



Landscaping - Monthly

Landscaping Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

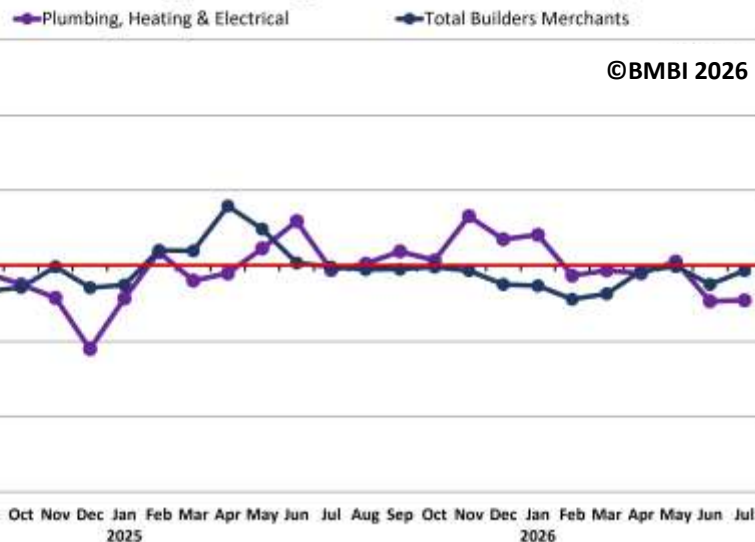
Plumbing, Heating & Electrical % change



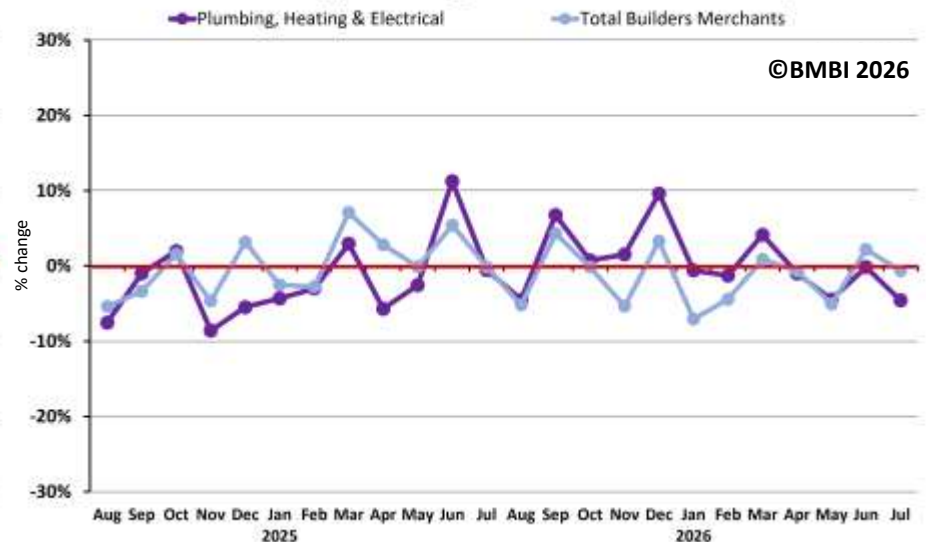
Like-for-like value sales

Total (unadjusted) value sales

Plumbing, Heating & Electrical - Monthly



Plumbing, Heating & Electrical - Monthly



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

Monthly Year-on-year

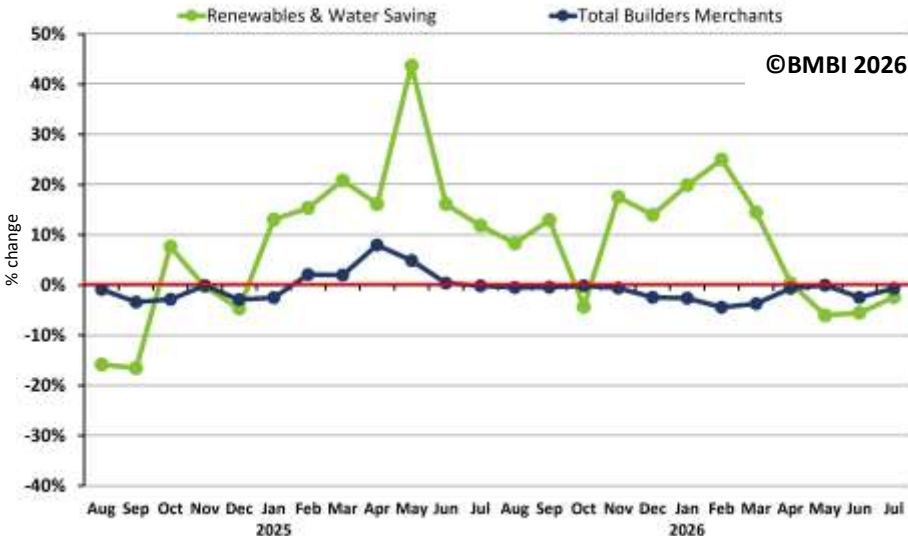
Renewables & Water Saving % change



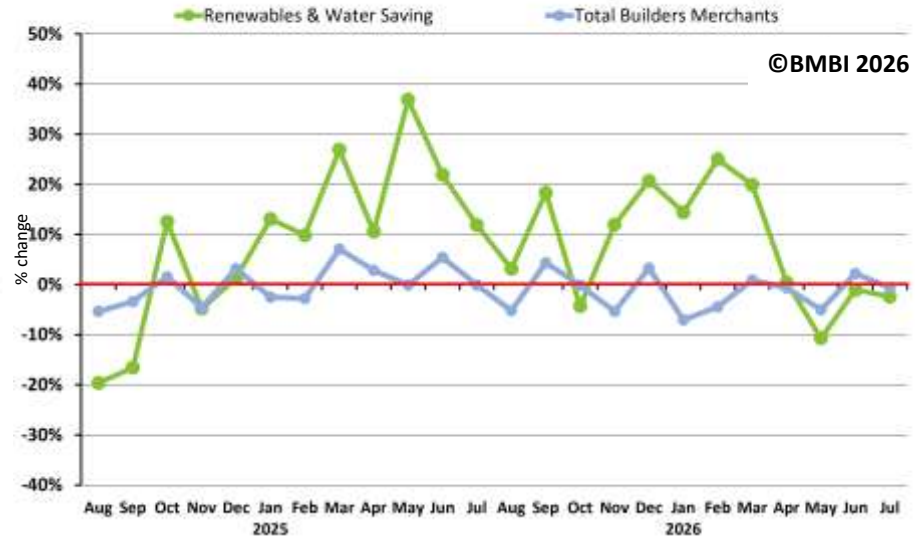
Like-for-like value sales

Total (unadjusted) value sales

Renewables & Water Saving - Monthly



Renewables & Water Saving - Monthly



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

Monthly Year-on-year

Kitchens & Bathrooms % change



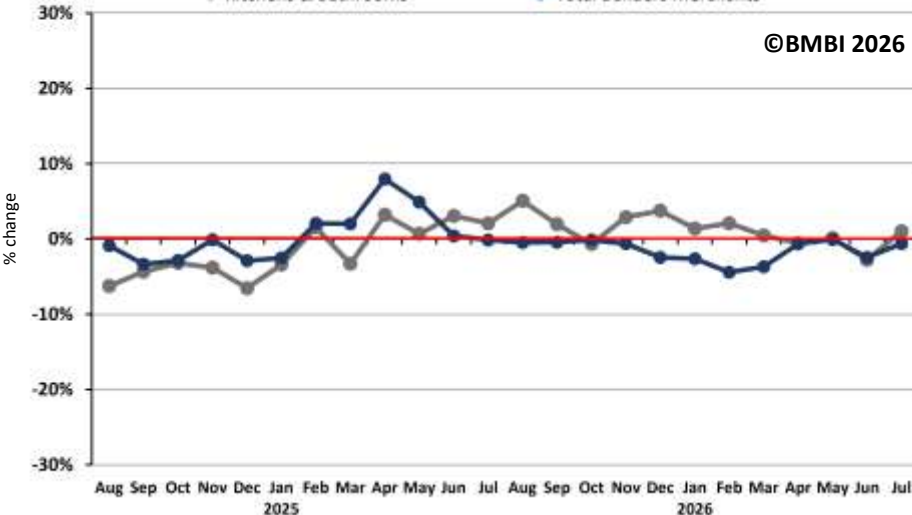
Like-for-like value sales

Total (unadjusted) value sales

Kitchens & Bathrooms - Monthly

— Kitchens & Bathrooms — Total Builders Merchants

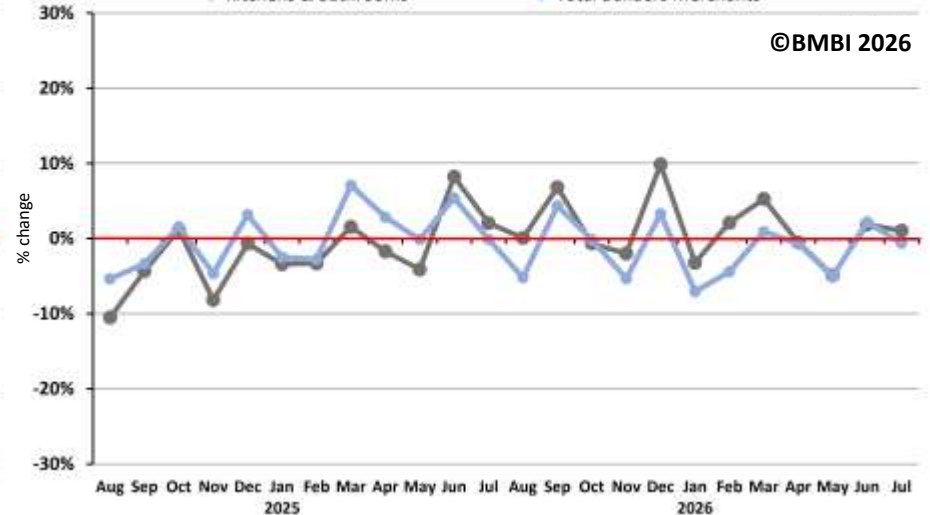
©BMBI 2026



Kitchens & Bathrooms - Monthly

— Kitchens & Bathrooms — Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Miscellaneous % change



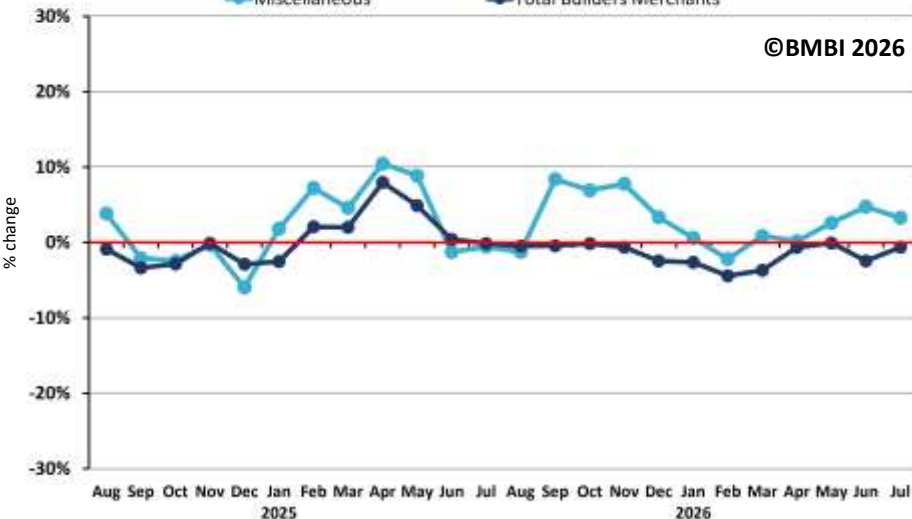
Like-for-like value sales

Total (unadjusted) value sales

Miscellaneous - Monthly

Miscellaneous Total Builders Merchants

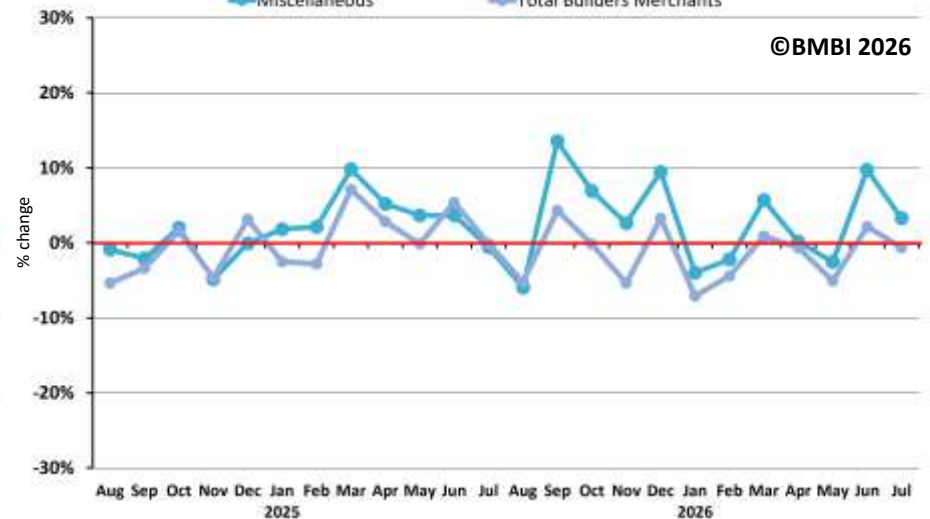
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Miscellaneous - Monthly

Miscellaneous Total Builders Merchants

©BMBI 2026



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

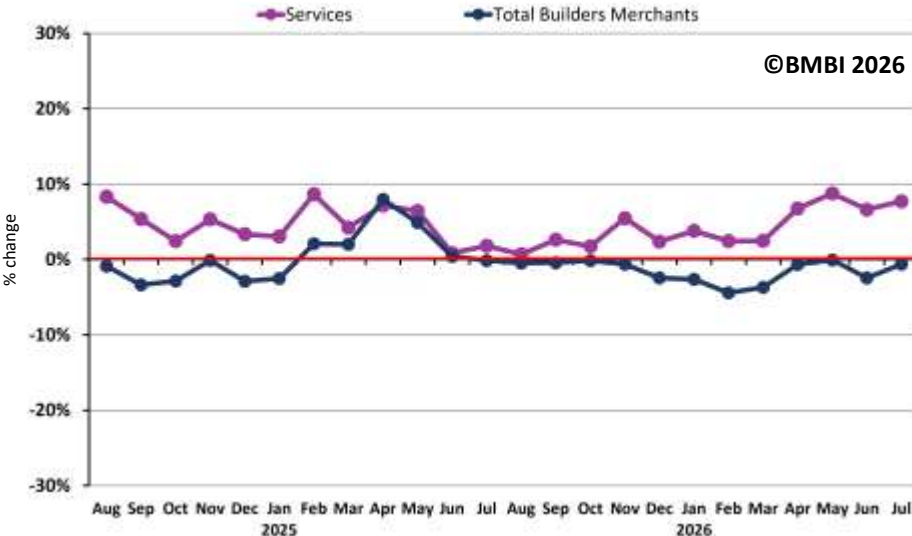
Monthly Year-on-year

Services % change



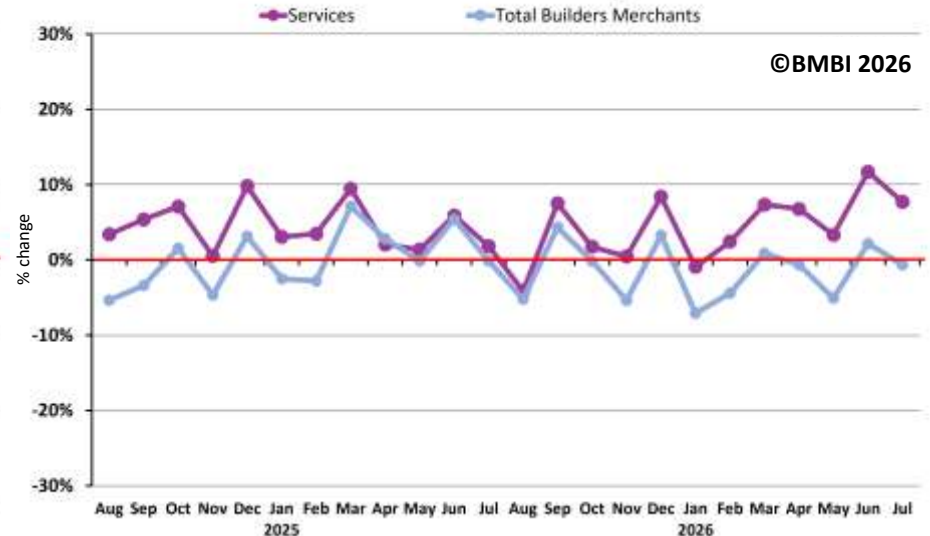
Like-for-like value sales

Services - Monthly



Total (unadjusted) value sales

Services - Monthly



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

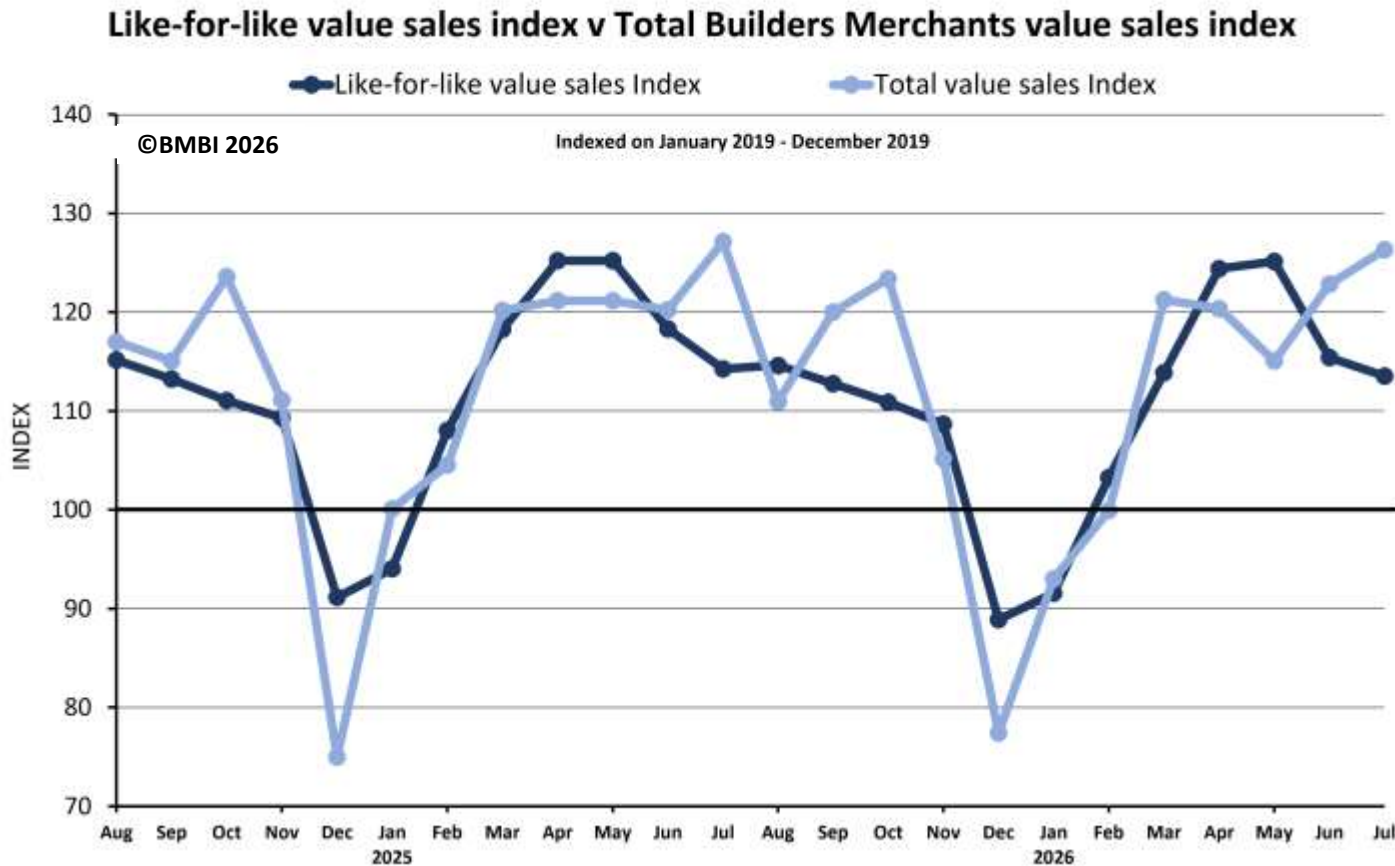
Monthly: Index

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.



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



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

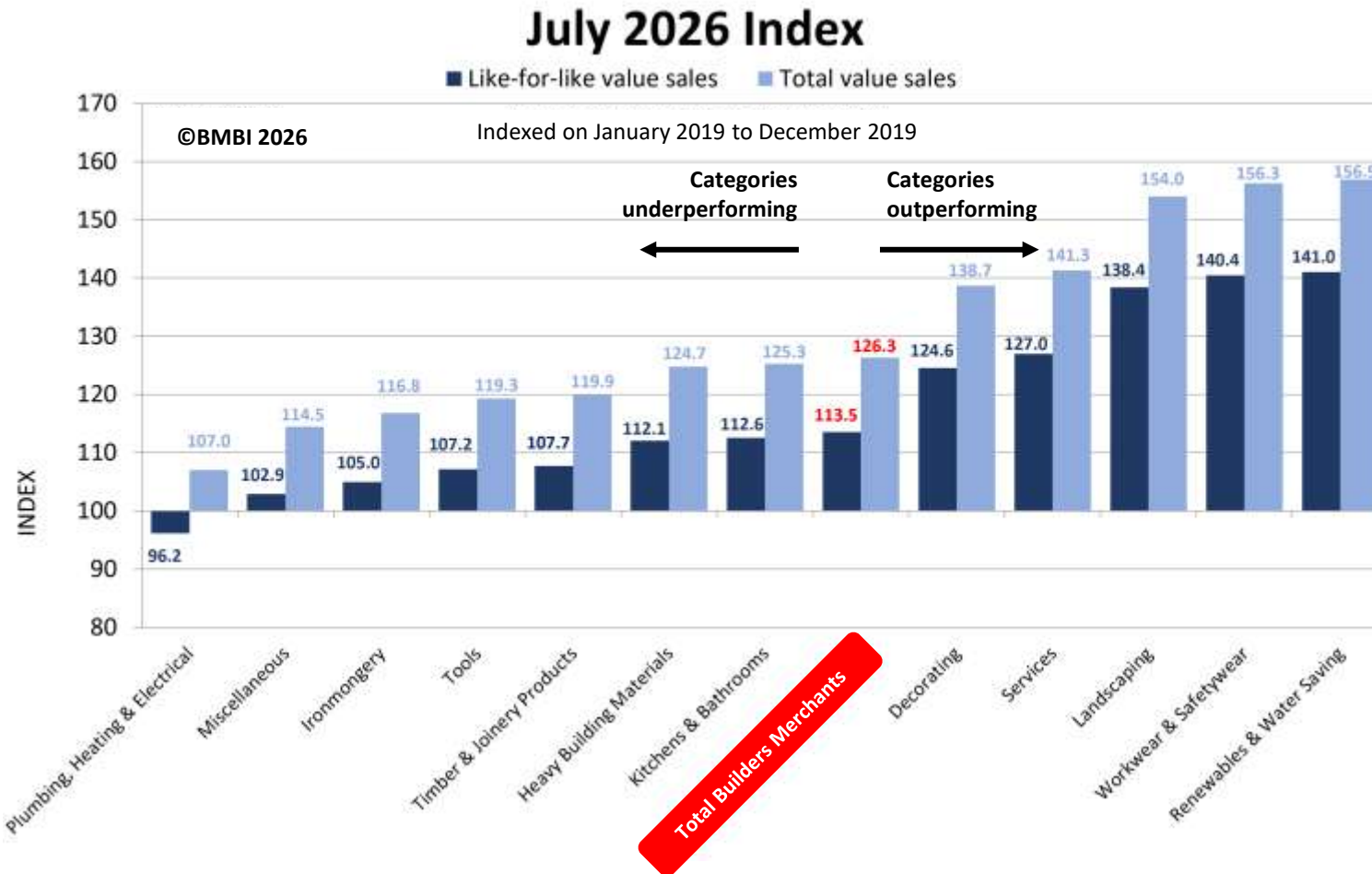
Latest month: Index by category

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.



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 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.



Source: GfK's Builders Merchants
Total Category Report: January
2019 to July 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 22	Jul 23	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 61	Q3	Q4

Half Year

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

Full Year

2024
251
2025
250
2026



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

NiQ GfK's Definition of Builders Merchant Panel

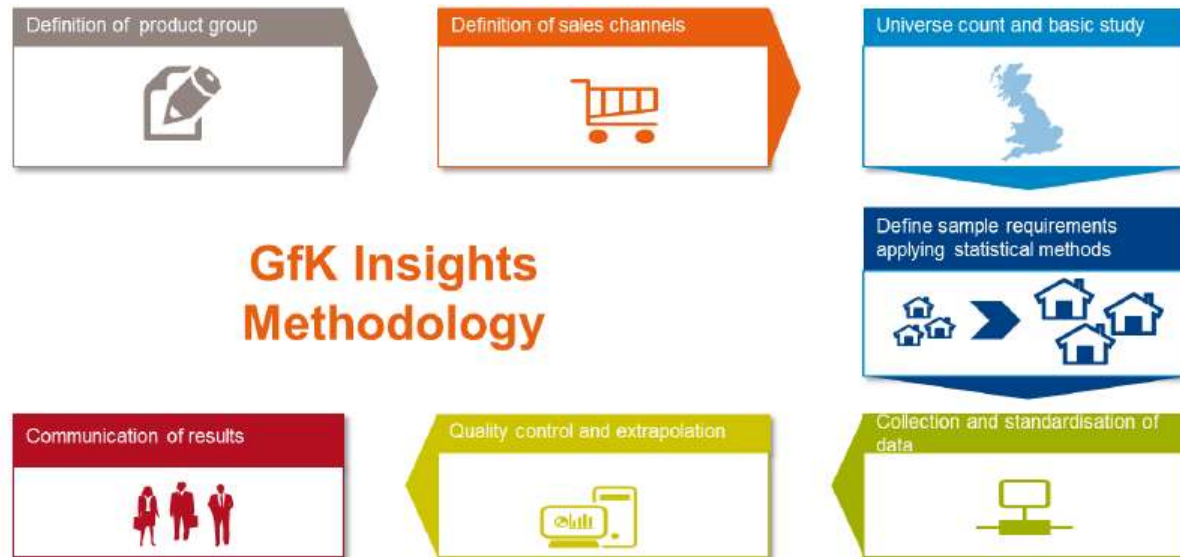


Generalist Builders Merchants definition:

- 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:





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

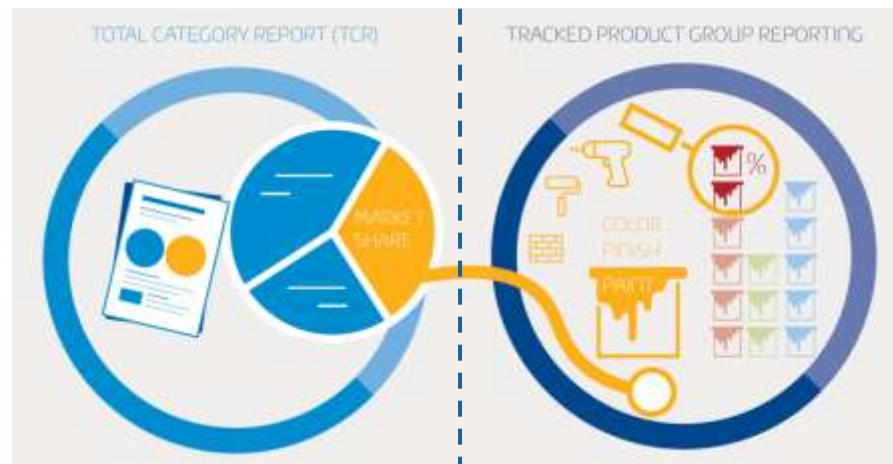
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

Miscellaneous

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

Services

Toolhire / Hire Services
Other Services



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.