

Excellence in building
materials supply

Builders Merchant Building Index



Monthly report for August 2026

(Published 28 October 2026)

Highlights - Like-for-like value sales

(adjusted to remove the effect of trading days)

BMBI: August 2026

Like-for-like value sales

(adjusted to remove the effect of trading days)

www.bmbi.co.uk



+0.5%

Latest month
Aug 2026
v
Last year
Aug 2025

Latest 3 months
Jun 2026 - Aug 2026
v
Last year
Jun 2025 - Aug 2025

-0.9%

Latest 12 months
Sept 2025 - Aug 2026
v
Previous 12 months
Sept 2024 - Aug 2025

-1.4%

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

-1.6%

“Total Builders Merchants **like-for-like value sales** were +0.5% higher in August 2026 compared with the same month last year. **Like-for-like volume** sales were down -5.4%.”

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Highlights - Total (unadjusted) value sales

BMBI: August 2026 Total (unadjusted) value sales

+0.5%

Latest month
Aug 2026
v
Last year
Aug 2025

+0.7%

Latest 3 months
Jun 2026 - Aug 2026
v
Last year
Jun 2025 - Aug 2025

Latest 12 months
Sept 2025 - Aug 2026
v
Previous 12 months
Sept 2024 - Aug 2025

-1.0%

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

-1.6%

With no difference in trading days in the latest month, **unadjusted value** sales were +0.5% higher in August 2026 than in August 2025. **Volume** sales were down -5.4% but **prices increased** +6.2%.

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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.

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
Commercial Director –
Cement, GGBS & Packed
Products
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

BMBI August year-on-year value sales up +0.5%, but volumes down -5.4%

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

- Total Builders Merchants like-for-like value sales were 0.5% higher in August 2026 compared with the same month last year.

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

- But Total Builders Merchants like-for-like volume sales were down -5.4% with prices up +6.2%.

Latest 3 months v previous year: June 2026 - August 2026 v June 2025 - August 2025

- Total Builders Merchants like-for-like value sales were -0.9% lower in the latest 3 months compared to the previous year.
- But Total Builders Merchants like-for-like volume sales were down -7.7% with prices up +7.4%.

Latest 12 months v previous 12 months: September 2025 - August 2026 v September 2024 - August 2025

- Total Builders Merchants like-for-like value sales in the latest 12 months, September 2025 to August 2026 were -1.4% lower compared to the same period a year earlier, September 2024 to August 2025.
- Total Builders Merchants like-for-like volume sales were down -5.5% but prices were up +4.3%.

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

- Total Builders Merchants like-for-like value sales in the eight months, January to August 2026 were -1.6% lower compared to the same period a year earlier, January to August 2025.
- However Total Builders Merchants like-for-like volume sales were down -7.2% with prices up +6.0%.

Year-to-date

Total Builders Merchants **like-for-like value** sales in the 8 months Jan to Aug were -1.6% down v Jan to Aug 2025.

Overview continues on the next page...

Overview - 2 - Total (unadjusted)

... continued from the previous page:

August 2026 v August 2025

- With no difference in trading days in the latest month, unadjusted value sales were 0.5% higher in August 2026 than in August 2025. By value, nine of the twelve categories sold more, led by Workwear & Safetywear (+22.8%). Ironmongery (-1.5%), Heavy Building Materials (-0.8%) and Tools (-0.6%) decreased.
- With no difference in trading days, unadjusted volume sales were -5.4% lower in August 2026 than in August 2025 but prices were up +6.2%. By volume, four of the twelve categories sold more. Services (+15.2%), Workwear & Safetywear (+9.5%), and Kitchens & Bathrooms (+9.1%) were the top performing categories. Timber & Joinery Products (-0.2%) fell less than Total Builders Merchants, but Heavy Building Materials volume was down -8.2%.

Latest three months v last year: June 2026 - August 2026 v June 2025 - August 2025

- With one more trading day in the latest period, unadjusted value sales were 0.7% higher in the latest 3 months compared to last year. By value, seven of the twelve categories sold more, led by Workwear & Safetywear (+17.4%) and Services (+9.1%). Timber & Joinery Products (+1.0%) rose more than Total Builders Merchants, but Heavy Building Materials fell (-1.0%). Plumbing, Heating & Electrical (-1.6%) was the weakest category
- With one more trading day, unadjusted volume sales were -6.3% lower in the latest 3 months compared to last year. Prices increased +7.4%. Five of the twelve categories sold more by volume: Services (+17.7%) and Workwear & Safetywear (+17.5%) performed best. Timber & Joinery Products (-0.5%) declined less than Total Builders Merchants, but Heavy Building Materials fell -9.5%.

**Aug 2026
v Aug 2025**

With no difference in trading days,
unadjusted value
sales were 0.5% higher
in Aug v Aug 2025.

Overview continues on the next page...

Overview - 3 - Total (unadjusted)

... continued from the previous page:

Latest 12 months v previous 12 months: September 2025 – August 2026 v September 2024 - August 2025

- With one more trading day in the latest period, unadjusted value sales were -1.0% lower than in the previous 12 months. By value, seven of the twelve categories sold more, led by Renewables & Water Saving (+7.0%). Timber & Joinery Products grew by +1.1% but Heavy Building Materials decreased -3.3% and was the weakest category.
- With one more trading day, unadjusted volume sales were -5.1% lower in the latest 12 months versus the previous 12 months. Prices were up +4.3%. By volume, five of the twelve categories sold more, led by: Workwear & Safetywear (+12.5%) and Miscellaneous (+12.3%). Timber & Joinery Products was down -0.2%, but Heavy Building Materials fell -7.9%.

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

- With no difference in trading days in the latest period unadjusted value sales were -1.6% lower in the eight months, January to August 2026 versus the same period a year earlier. By value, six of the twelve categories sold more, led by Workwear & Safetywear (+9.5%). Timber & Joinery Products (+0.3%) performed better than Total Builders Merchants. Heavy Building Materials fell -3.9%, and was the weakest category.
- With no difference in trading days, unadjusted volume sales were -7.2% lower in the eight months, January to August 2026 than the same period a year earlier. Prices were up +6.0%. By volume, four of the twelve categories sold more. Workwear & Safetywear (+16.1%) and Miscellaneous (+12.5%) performed best. Timber & Joinery Products (-1.3%) decreased less than Total Builders Merchants, but Heavy Building Materials fell -10.2% and was the second weakest category after Renewables & Water Saving (-20.9%).

Year-to-date

With no difference in trading days in the latest period **unadjusted value** sales were -1.6% lower in the 8 months Jan to Aug v the same 8 months a year earlier.

Latest month v last year

Total value sales, total volume sales & price % change



August 2026 v August 2025

©BMBI 2026	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (Unit price % change)
Workwear & Safetywear	+22.8%	+9.5%	+12.1%
Miscellaneous	+8.6%	+3.3%	+5.2%
Services	+8.0%	+15.2%	-6.3%
Landscaping	+2.1%	-2.0%	+4.2%
Renewables & Water Saving	+1.4%	-26.1%	+37.3%
Decorating	+1.4%	-4.4%	+6.1%
Timber & Joinery Products	+0.7%	-0.2%	+0.9%
Total Builders Merchants	+0.5%	-5.4%	+6.2%
Kitchens & Bathrooms	+0.4%	+9.1%	-8.0%
Plumbing, Heating & Electrical	+0.1%	+0.0%	+0.1%
Tools	-0.6%	-5.8%	+5.5%
Heavy Building Materials	-0.8%	-8.2%	+8.0%
Ironmongery	-1.5%	-2.2%	+0.8%



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

With no difference in trading days in the latest month, **unadjusted value** sales were up +0.5% Aug 2026 v Aug 2025.

Unadjusted volume sales were down -5.4% but **prices** were up +6.2%.

Latest 12 months v previous 12 months

Total value sales, total volume sales & price % change



September 2025 – August 2026 v September 2024 – August 2025

©BMBI 2026	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (Unit price % change)
Renewables & Water Saving	+7.0%	-15.0%	+26.0%
Workwear & Safetywear	+6.6%	+12.5%	-5.2%
Services	+5.4%	+6.0%	-0.5%
Miscellaneous	+4.0%	+12.3%	-7.3%
Kitchens & Bathrooms	+1.1%	+2.6%	-1.4%
Timber & Joinery Products	+1.1%	-0.2%	+1.3%
Plumbing, Heating & Electrical	+0.8%	-2.6%	+3.5%
Tools	-0.3%	-2.4%	+2.2%
Landscaping	-0.5%	-1.7%	+1.2%
Decorating	-0.5%	-2.4%	+2.0%
Total Builders Merchants	-1.0%	-5.1%	+4.3%
Ironmongery	-1.2%	+0.9%	-2.0%
Heavy Building Materials	-3.3%	-7.9%	+4.9%



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

With one more trading day
unadjusted value sales were -1.0% lower in the latest 12 months v the same period a year earlier

Unadjusted volume sales were -5.1% lower. **Prices** were up +4.3%.

Year to date

Total value sales, total volume sales & price % change



January 2026 – August 2026 v January 2025 – August 2025



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

Unadjusted value
sales were down
-1.6% Jan - Aug
2026 v Jan
– Aug 2025

Unadjusted
volume sales
were down -7.2%
but prices were
up +6.0%.

©BMBI 2026	Total value sales (GBP % change)	Total volume sales (Units % change)	Price (Unit price % change)
Workwear & Safetywear	+9.5%	+16.1%	-5.6%
Services	+6.0%	+7.5%	-1.4%
Renewables & Water Saving	+5.7%	-20.9%	+33.6%
Miscellaneous	+2.2%	+12.5%	-9.2%
Kitchens & Bathrooms	+0.3%	+3.7%	-3.3%
Timber & Joinery Products	+0.3%	-1.3%	+1.6%
Decorating	-0.5%	-3.1%	+2.7%
Tools	-0.9%	-3.4%	+2.6%
Plumbing, Heating & Electrical	-0.9%	-4.9%	+4.2%
Landscaping	-1.3%	-4.0%	+2.8%
Total Builders Merchants	-1.6%	-7.2%	+6.0%
Ironmongery	-2.2%	-0.1%	-2.1%
Heavy Building Materials	-3.9%	-10.2%	+7.1%

Monthly Year-on-year

Total value sales & total volume sales

Unadjusted, year-on-year % change, Sep-25 to Aug-26



-0.8%

Value sales
Aug-26 v Aug-25

-8.2%

Volume sales
Aug-26 v Aug-25

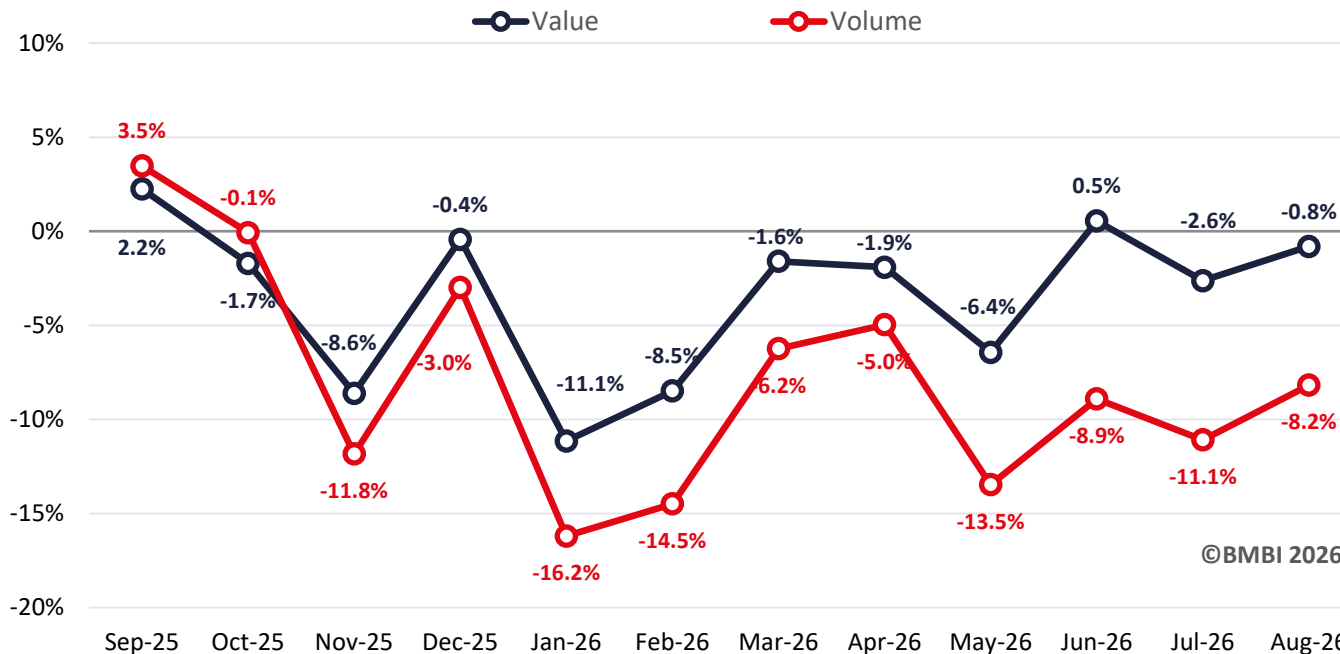
+8.0%

Prices
Aug-26 v Aug-25

NIQ **GfK**

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

Heavy Building Materials Year-on-year sales growth



Value (-0.8%) has held up better than volume (-8.2%) over the last 12 months because of price increases.

Latest month v last year

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

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

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



August 2026 v August 2025



NIQ GfK

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

Like-for-like value sales were +0.5% higher in Aug 2026 v Aug 2025.

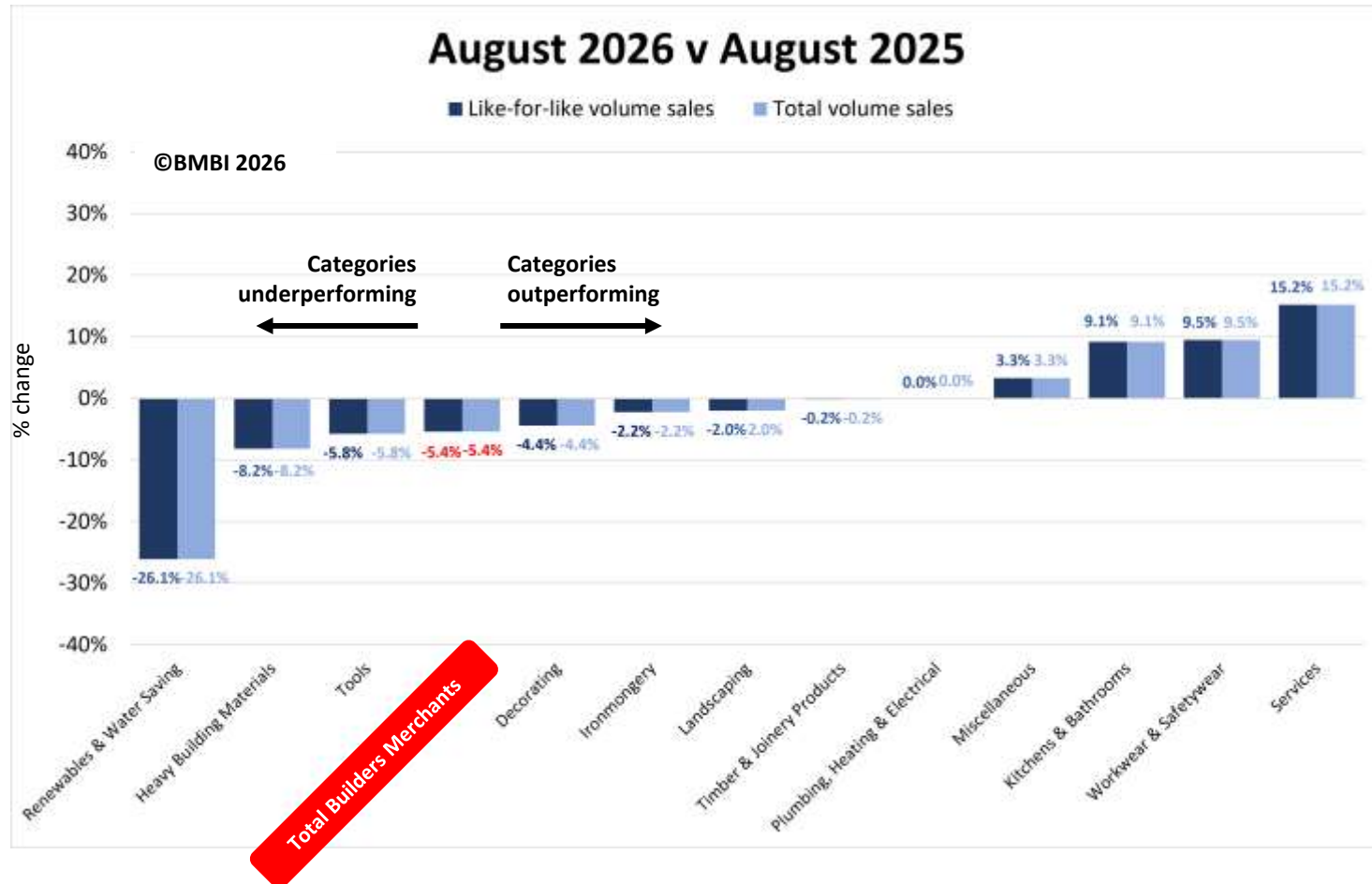
Like-for-like volume sales were down -5.4%.
Prices were up +6.2%.

Latest month v last year

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

20 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 August 2026

Services was the
standout category -
up +15.2% **like-for-
like Volume** sales.

Latest month v previous month

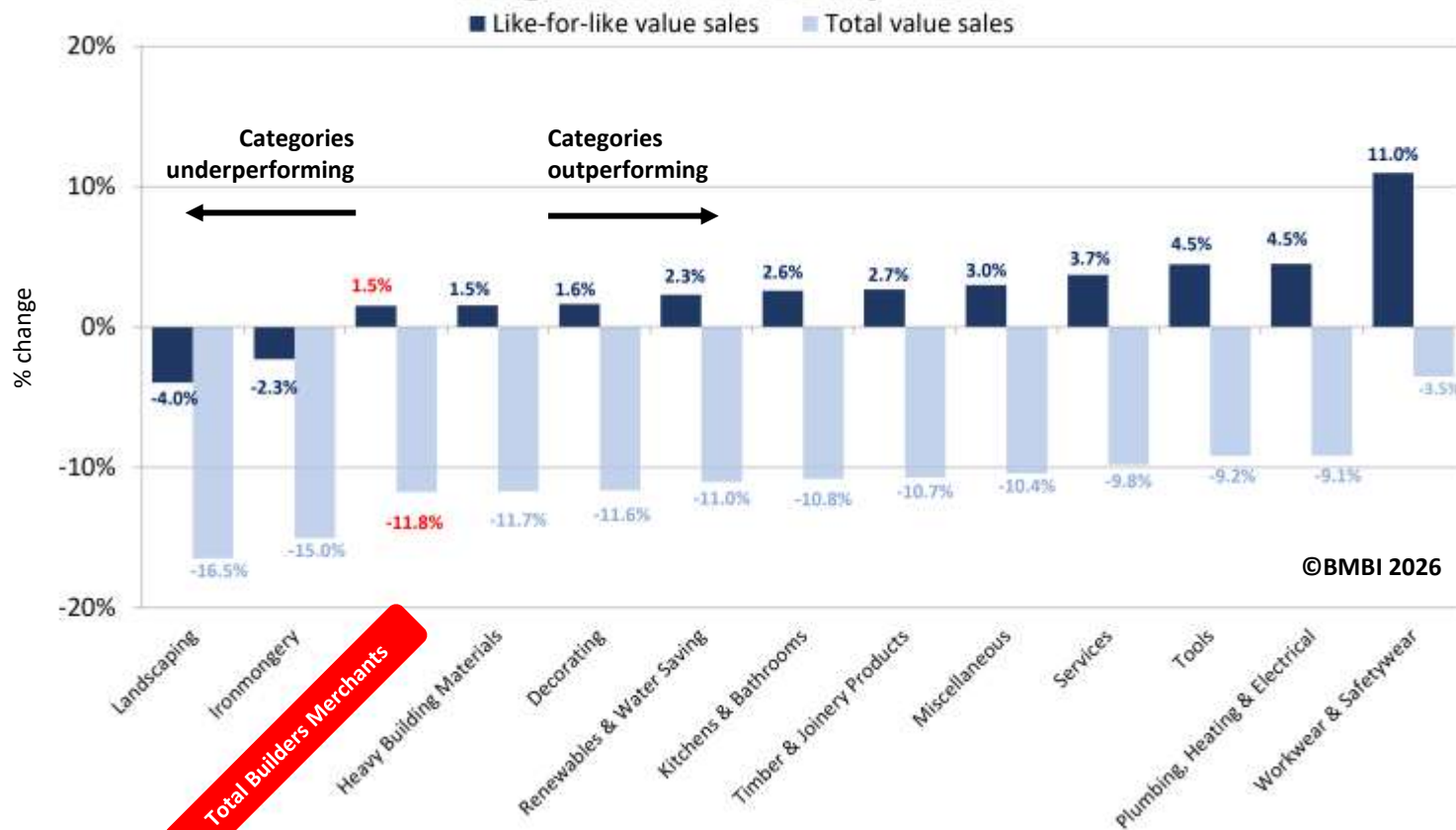
Like-for-like value sales and Total value sales % change

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

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



August 2026 v July 2026



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

**Like-for-like
value sales** were up
+1.5% Aug 2026 v
July 2026.

**Like-for-like
volumes** were
up +1.9%.
Prices fell -0.4%.

Latest 3 months v last year

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

65 Trading days in this recent period v 64 in the previous period.

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



3 months Jun 26 to Aug 26 v 3 months Jun 25 to Aug 25



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

Like-for-like value sales are down -0.9% in latest 3 months v previous year.

Like-for-like volumes fell -7.7%. **Prices** rose +7.4%.

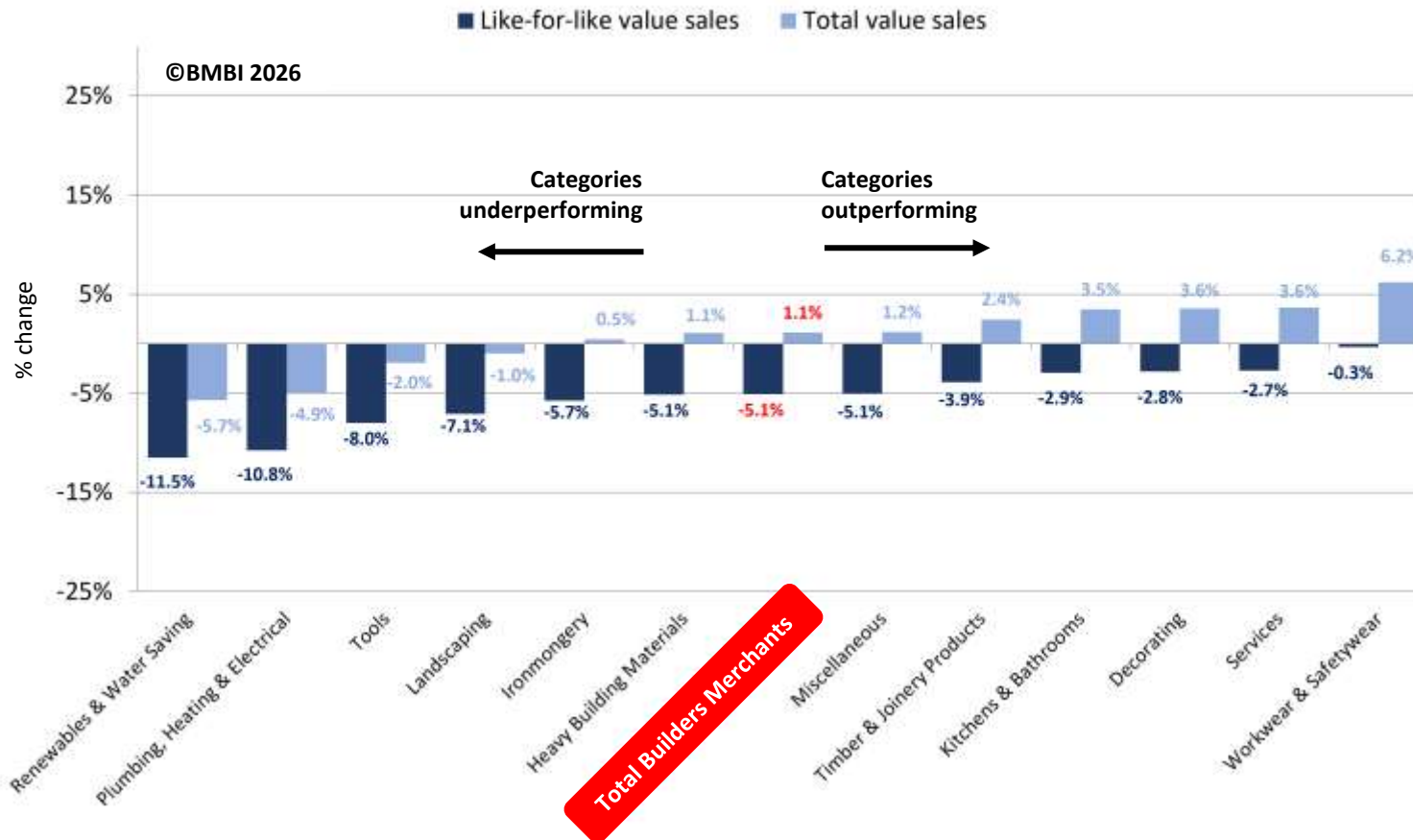
Latest 3 months v previous 3 months

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

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



3 months Jun 26 to Aug 26 v 3 months Mar 26 to May 26



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

Like-for-like value sales were down -5.1% in last 3 months v previous 3 months.

Like-for-like volumes -7.2%.
Prices up +2.3%.

Latest 12 months v previous 12 months

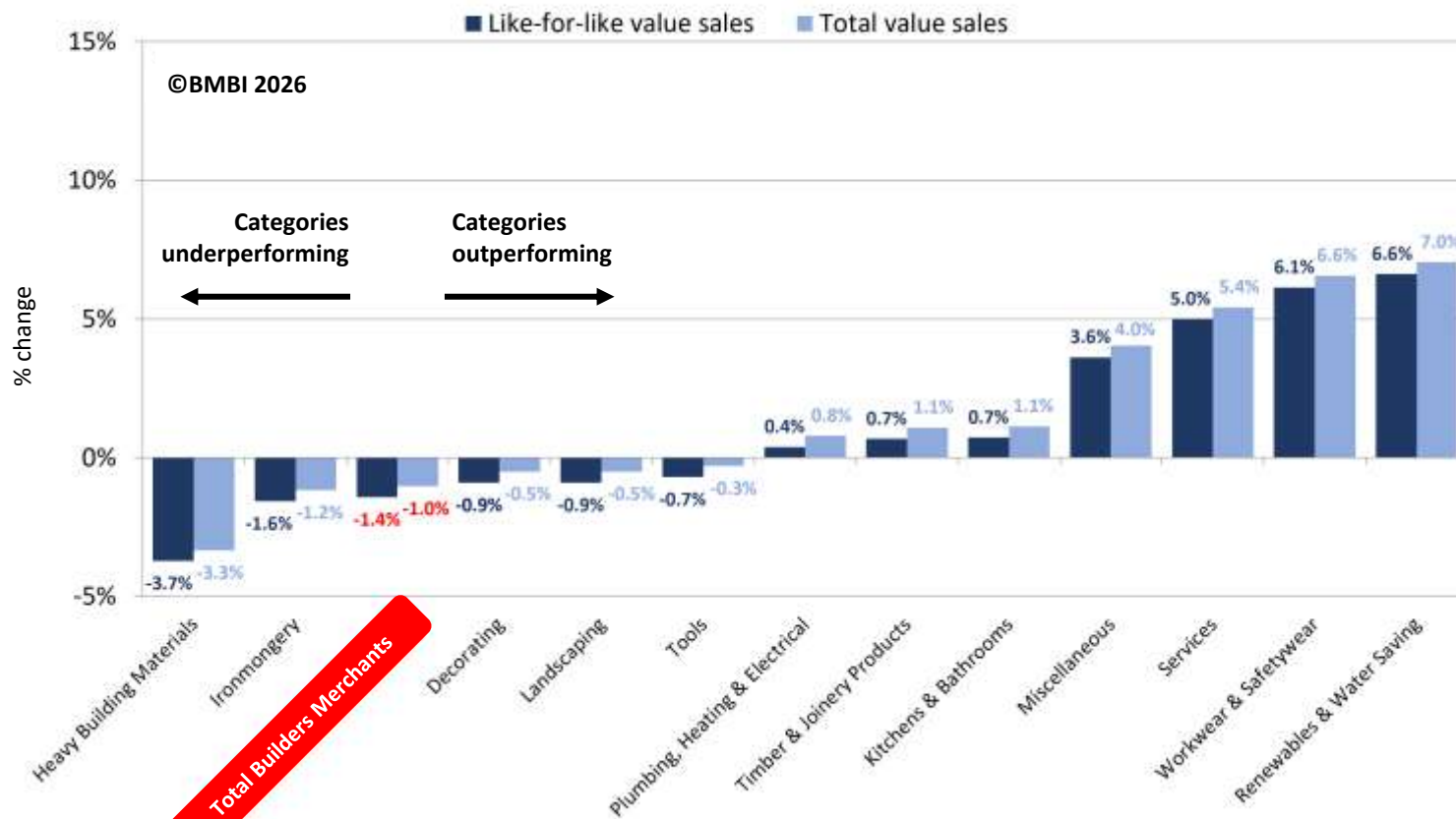
Like-for-like value sales and Total value sales % change



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

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

12 months Sep 25 to Aug 26 v 12 months Sep 24 to Aug 25



NIQ GfK

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

Like-for-like value sales in the latest 12 months, Sept 2025 to Aug 2026 were down -1.4% v the same period a year earlier.

Like-for-like volume sales -5.5%.
Prices up +4.3%.

Latest 12 months v previous 12 months

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



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

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

September 2025 - August 2026 v September 2024 - August 2025



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

Total like-for-like volume sales in the latest 12 months, Sept 2025 to Aug 2026 were -5.5% lower v Sept 2024 to Aug 2025

Prices rose +4.3% in the same period

Year-to-date v last year

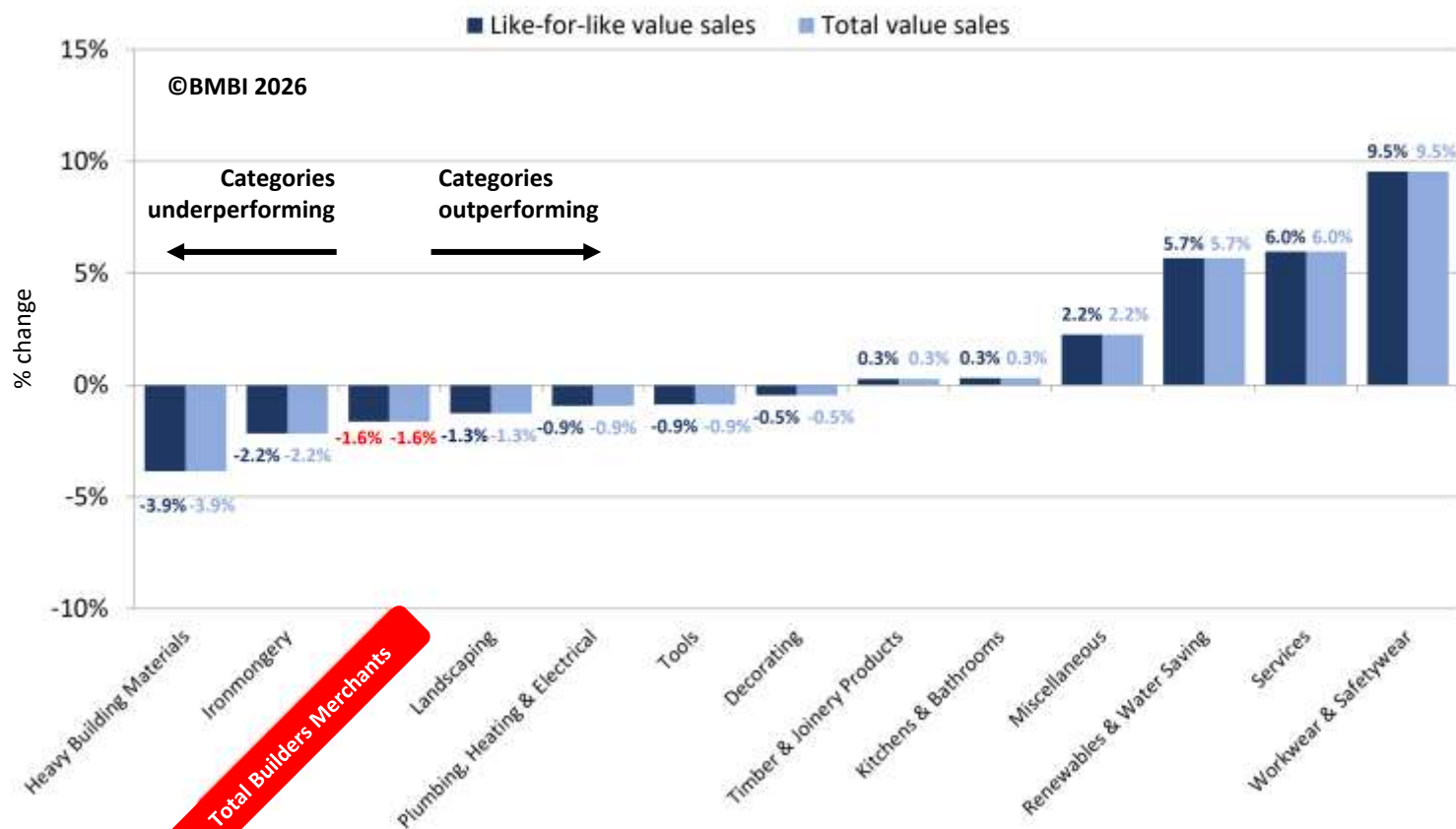
Like-for-like value sales and Total value sales % change

167 trading days in the latest period v 167 trading days last year.

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



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



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

Like-for-like value sales in the 8 months, Jan to Aug 2026 were -1.6% lower compared to Jan to Aug 2025.

Like-for-like volume sales -7.2%.
Prices up +6.0%.

Monthly Year-on-year

Timber & Joinery Products % change



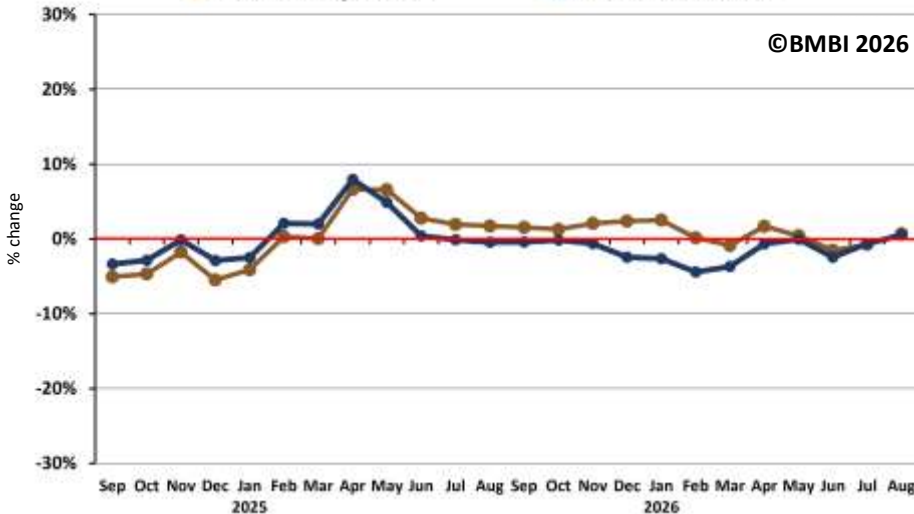
Like-for-like value sales

Total (unadjusted) value sales

Timber & Joinery Products - Monthly

Timber & Joinery Products Total Builders Merchants

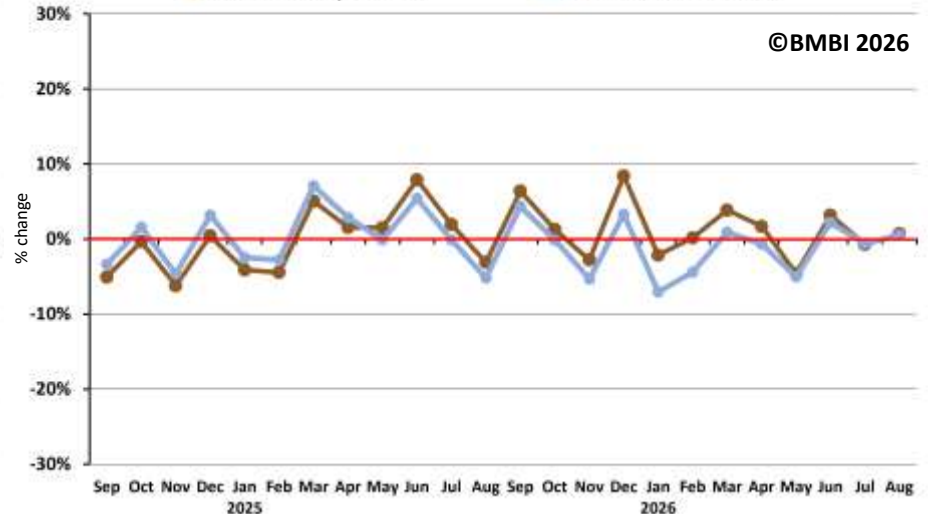
©BMBI 2026



Timber & Joinery Products - Monthly

Timber & Joinery Products Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Heavy Building Materials % change

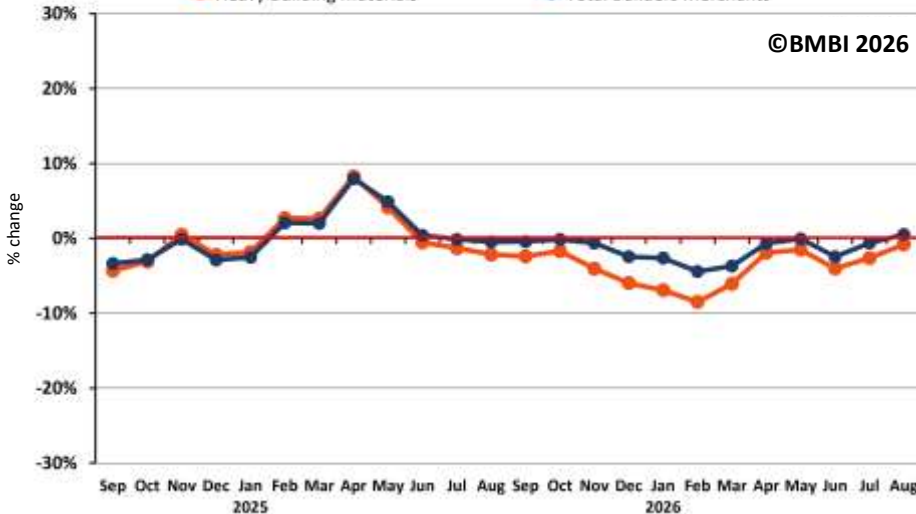


Like-for-like value sales

Heavy Building Materials - Monthly

Heavy Building Materials Total Builders Merchants

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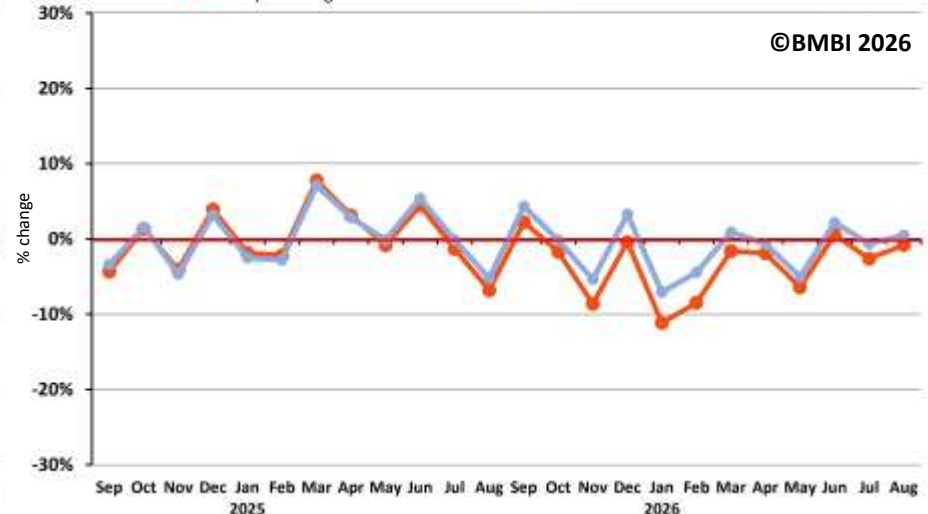


Total (unadjusted) value sales

Heavy Building Materials - Monthly

Heavy Building Materials Total Builders Merchants

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

Monthly Year-on-year

Decorating % change



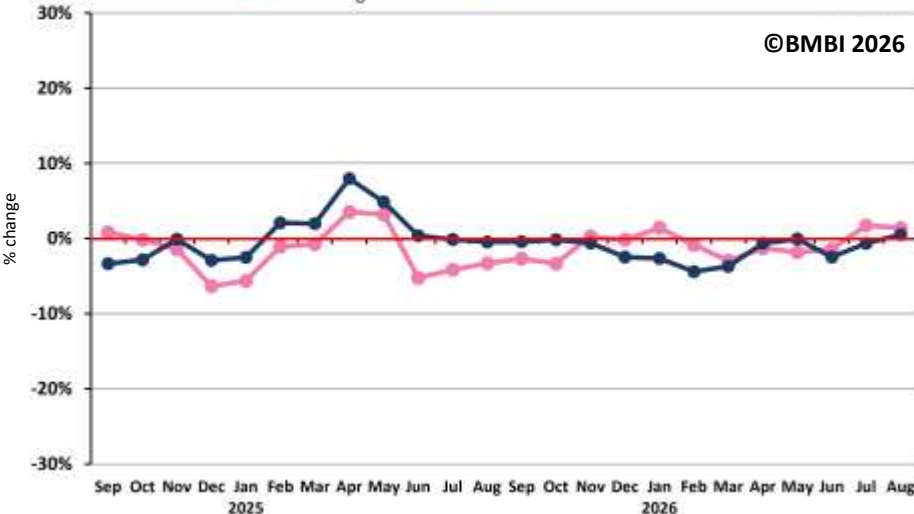
Like-for-like value sales

Total (unadjusted) value sales

Decorating - Monthly

Decorating Total Builders Merchants

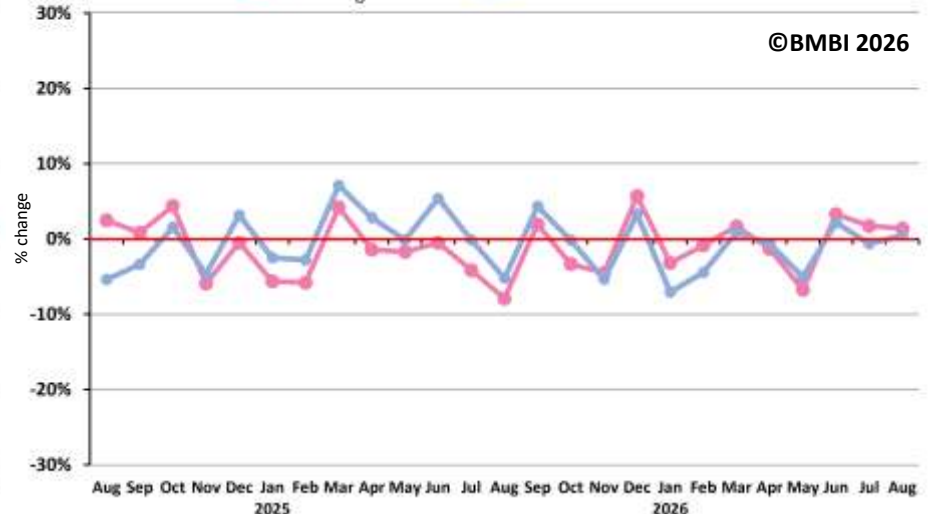
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Decorating - Monthly

Decorating Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Tools % change



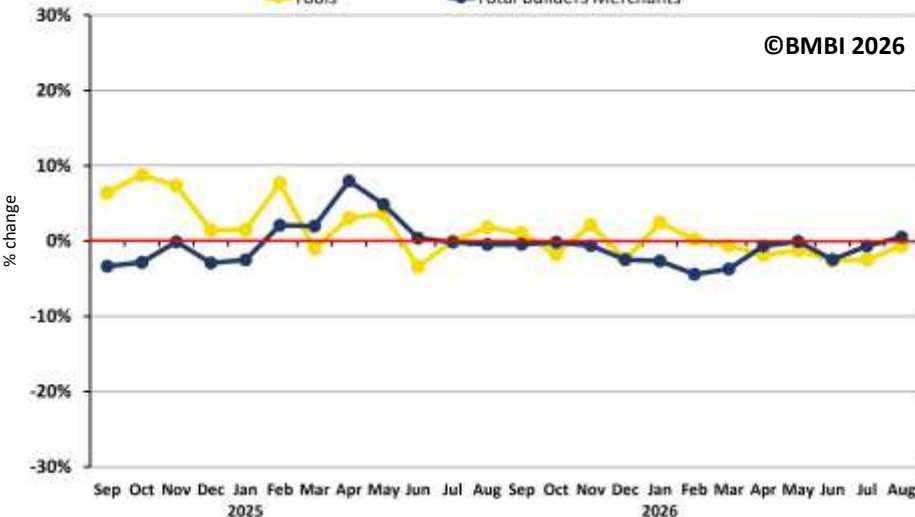
Like-for-like value sales

Total (unadjusted) value sales

Tools - Monthly

Tools Total Builders Merchants

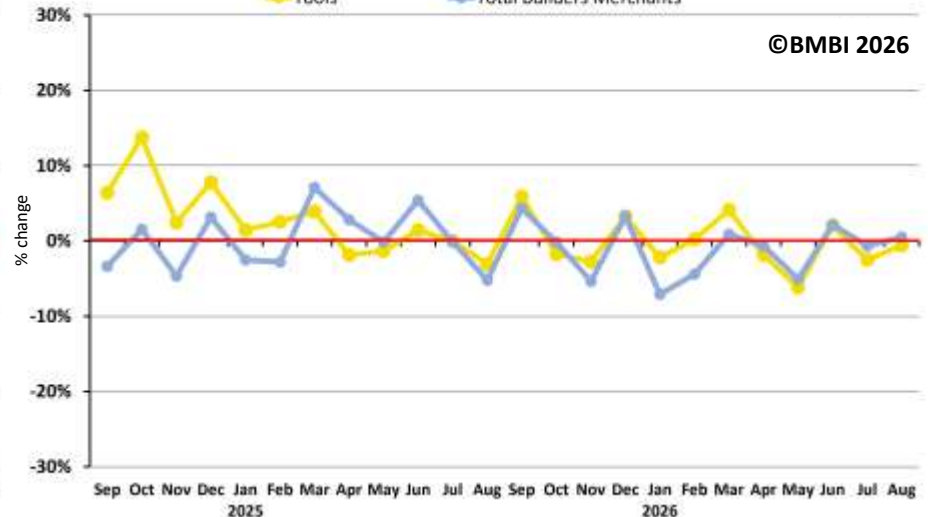
©BMBI 2026



Tools - Monthly

Tools Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Workwear & Safetywear % change

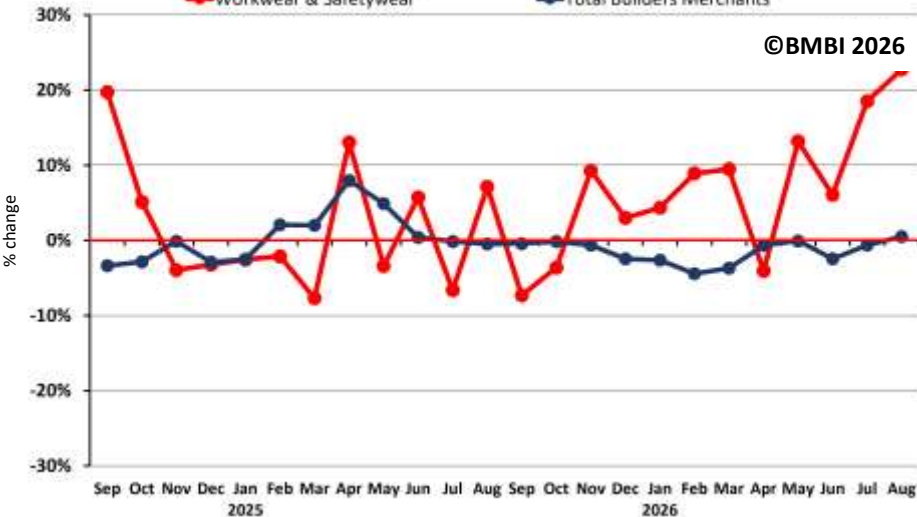


Like-for-like value sales

Total (unadjusted) value sales

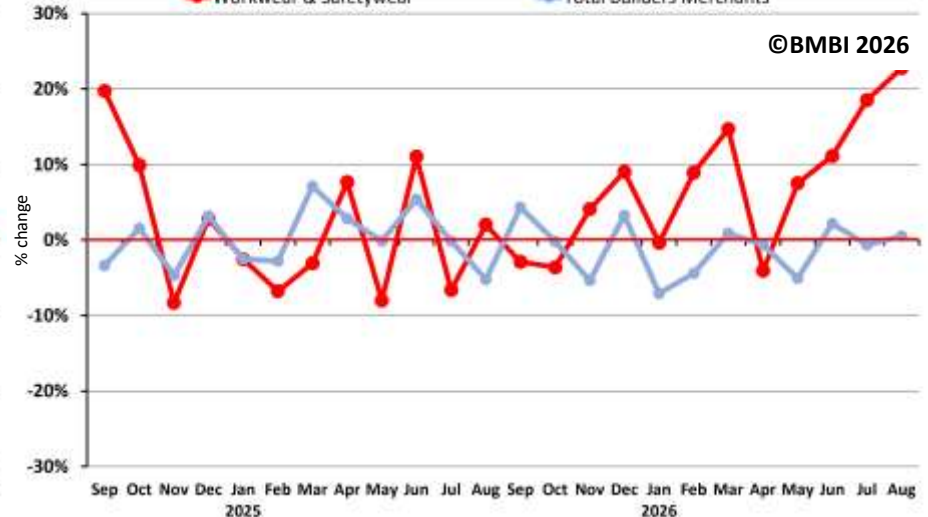
Workwear & Safetywear - Monthly

Workwear & Safetywear Total Builders Merchants



Workwear & Safetywear - Monthly

Workwear & Safetywear Total Builders Merchants



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

Monthly Year-on-year

Ironmongery % change



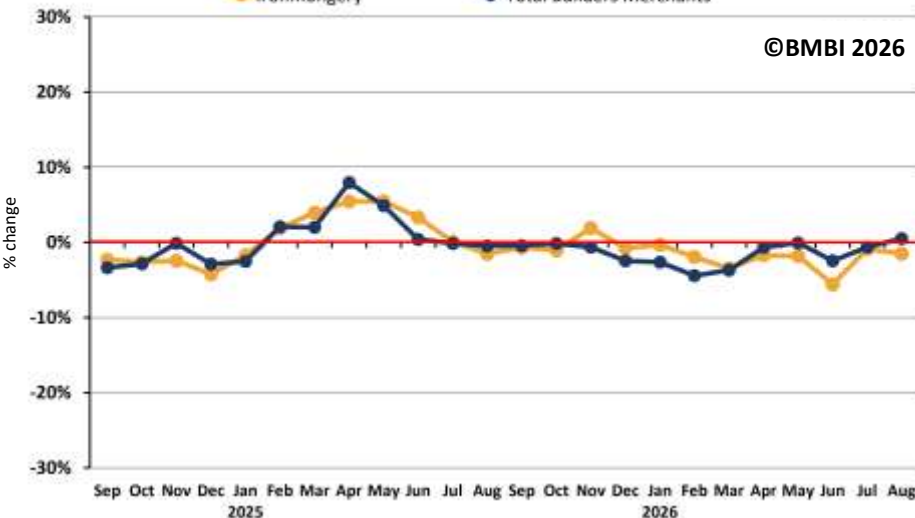
Like-for-like value sales

Total (unadjusted) value sales

Ironmongery - Monthly

Ironmongery Total Builders Merchants

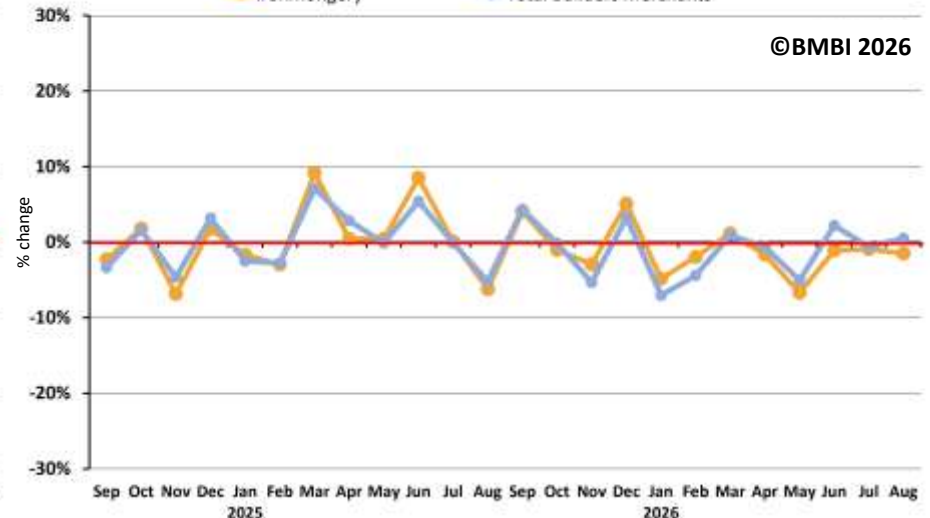
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Ironmongery - Monthly

Ironmongery Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Landscaping % change



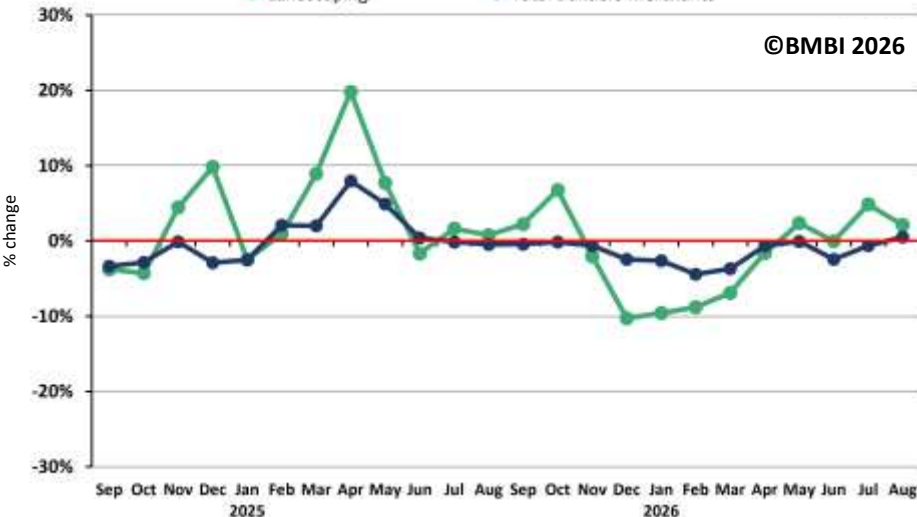
Like-for-like value sales

Total (unadjusted) value sales

Landscaping - Monthly

Landscaping Total Builders Merchants

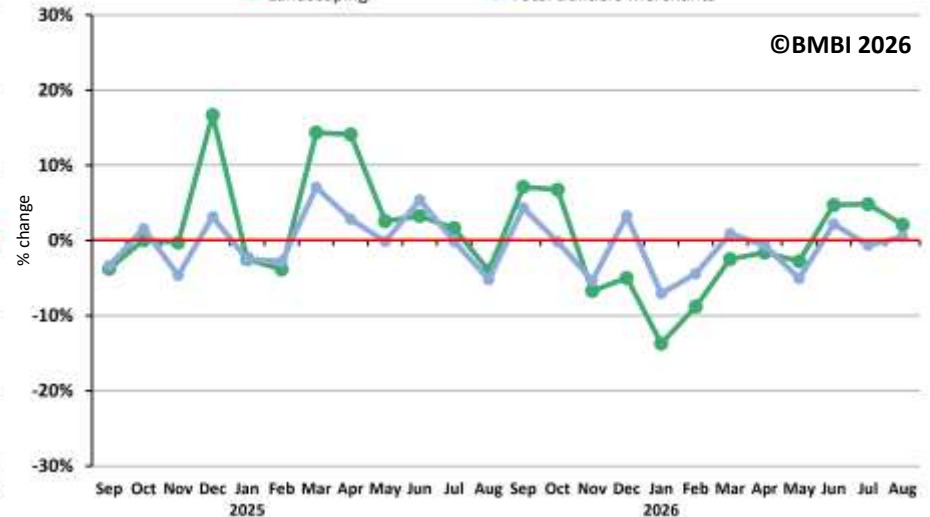
©BMBI 2026



Landscaping - Monthly

Landscaping Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

Plumbing, Heating & Electrical % change



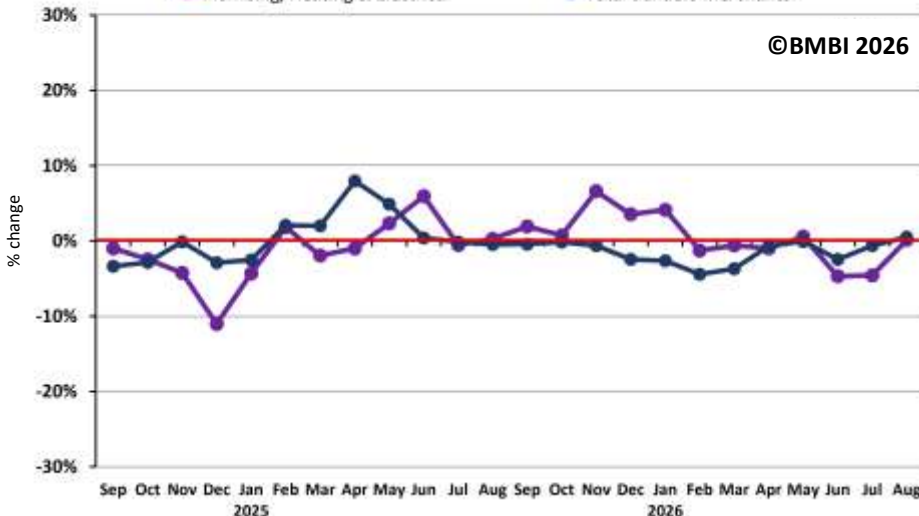
Like-for-like value sales

Total (unadjusted) value sales

Plumbing, Heating & Electrical - Monthly

Plumbing, Heating & Electrical Total Builders Merchants

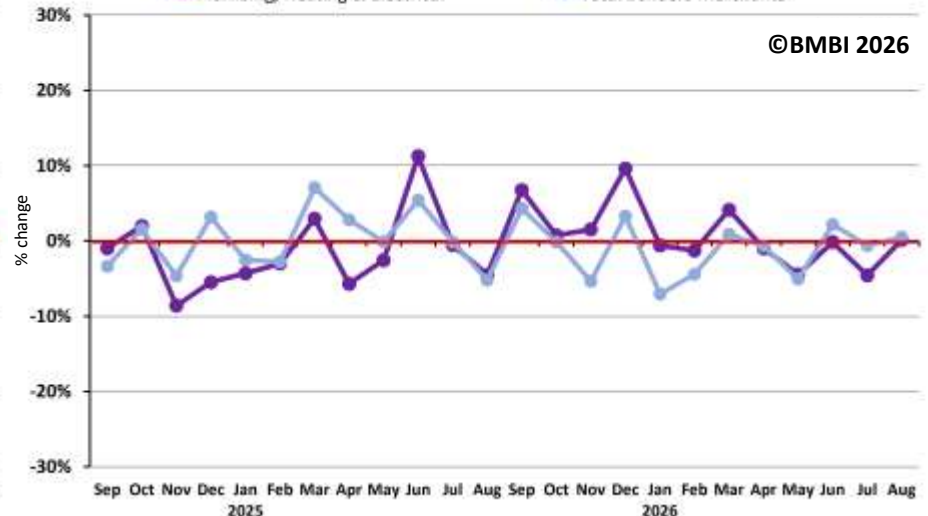
©BMBI 2026



Plumbing, Heating & Electrical - Monthly

Plumbing, Heating & Electrical Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

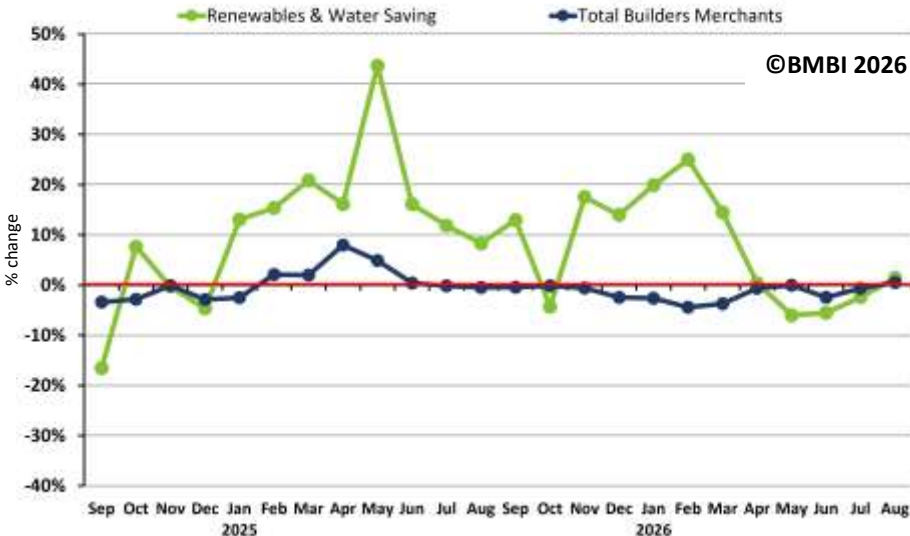
Renewables & Water Saving % change



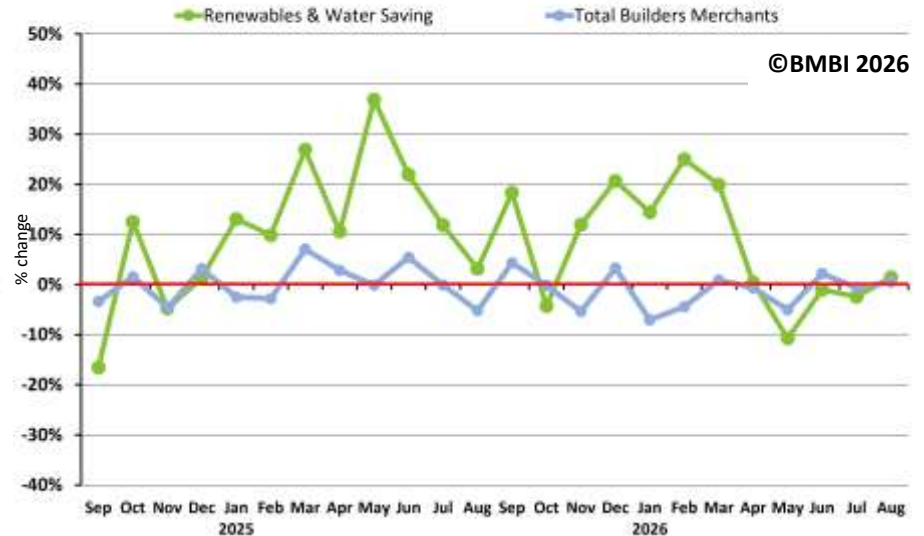
Like-for-like value sales

Total (unadjusted) value sales

Renewables & Water Saving - Monthly



Renewables & Water Saving - Monthly



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

Monthly Year-on-year

Kitchens & Bathrooms % change



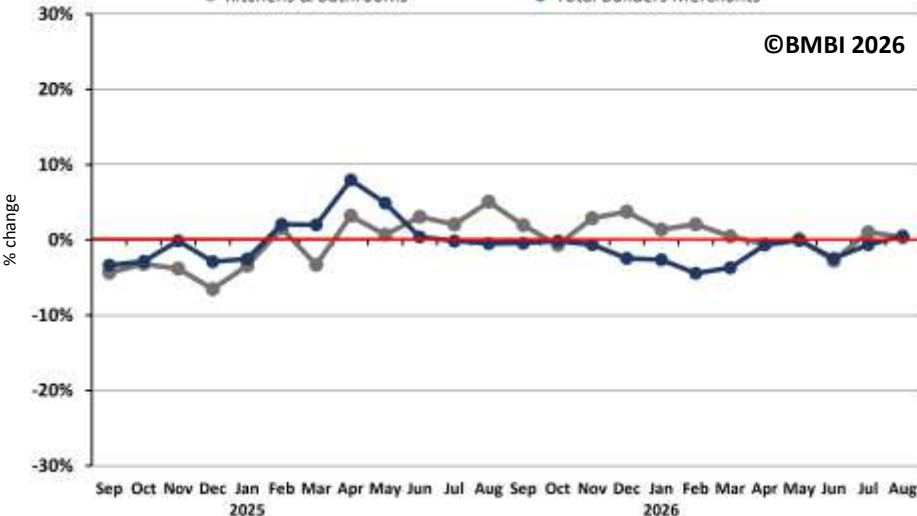
Like-for-like value sales

Total (unadjusted) value sales

Kitchens & Bathrooms - Monthly

— Kitchens & Bathrooms — Total Builders Merchants

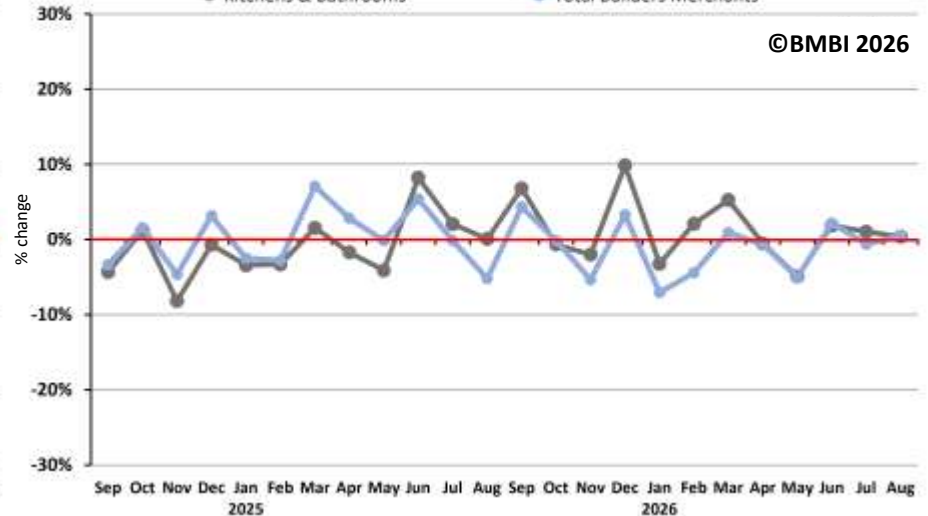
©BMBI 2026



Kitchens & Bathrooms - Monthly

— Kitchens & Bathrooms — Total Builders Merchants

©BMBI 2026



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

Monthly Year-on-year

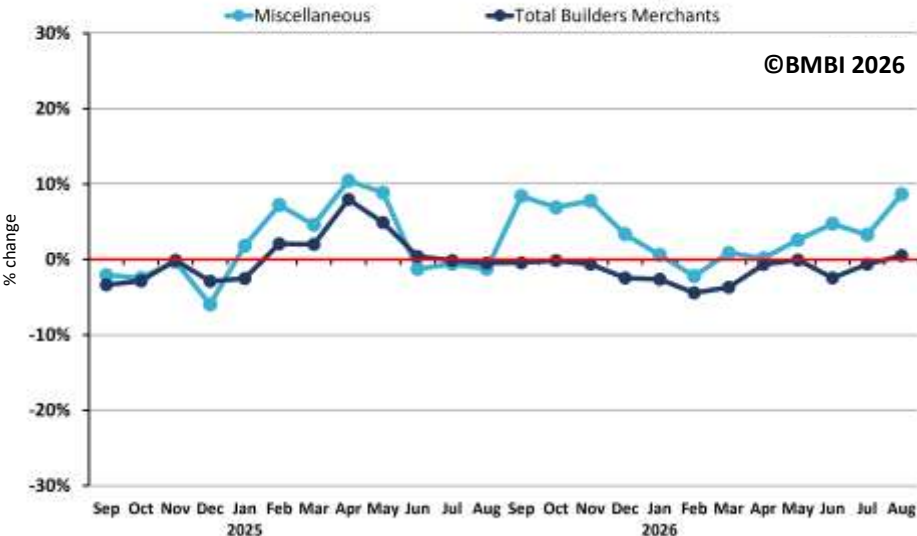
Miscellaneous % change



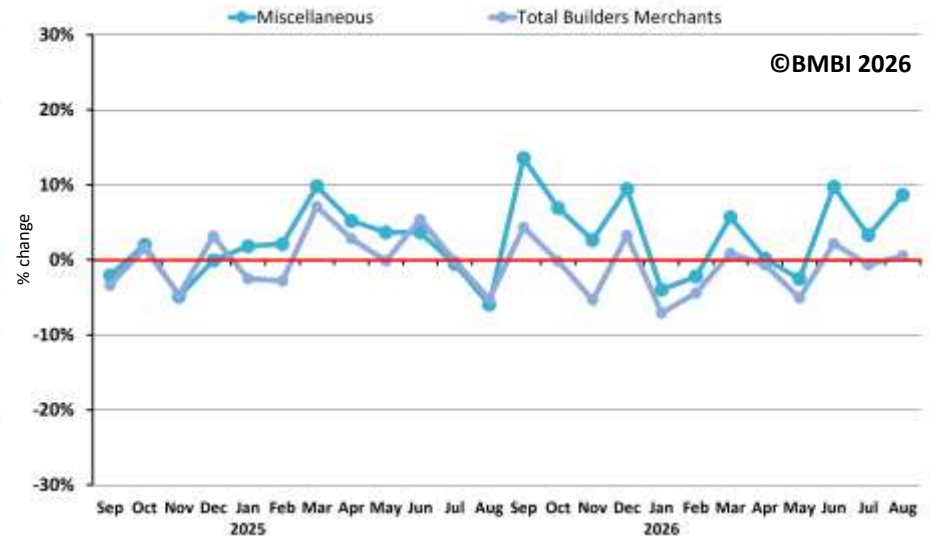
Like-for-like value sales

Total (unadjusted) value sales

Miscellaneous - Monthly



Miscellaneous - Monthly



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

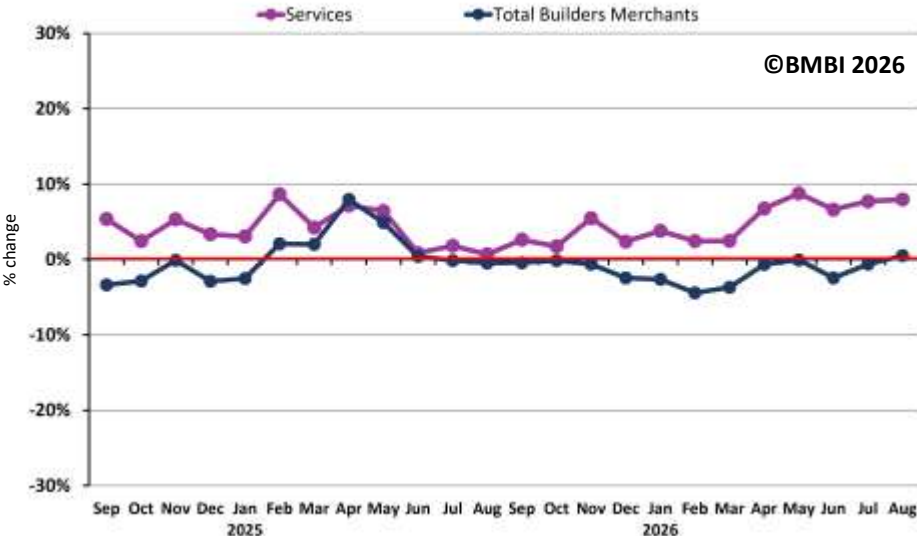
Monthly Year-on-year

Services % change



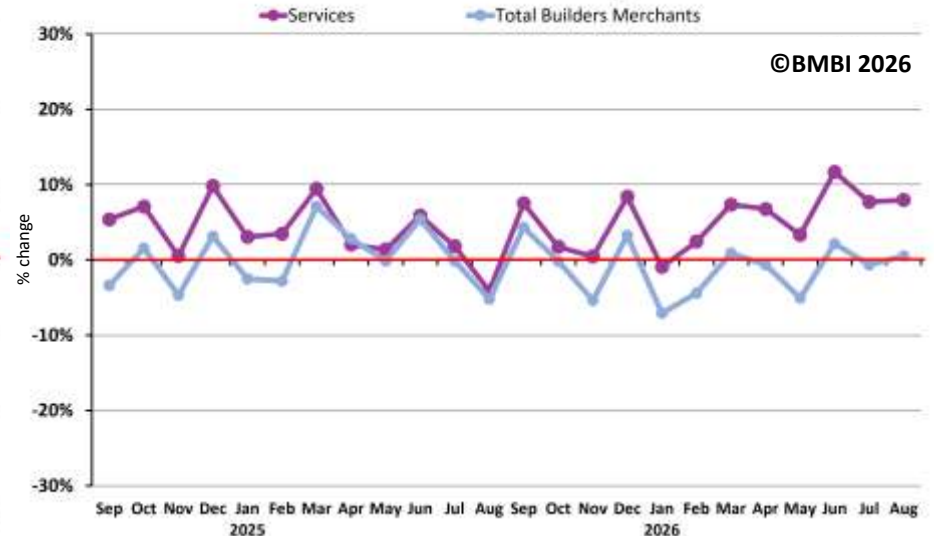
Like-for-like value sales

Services - Monthly



Total (unadjusted) value sales

Services - Monthly



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

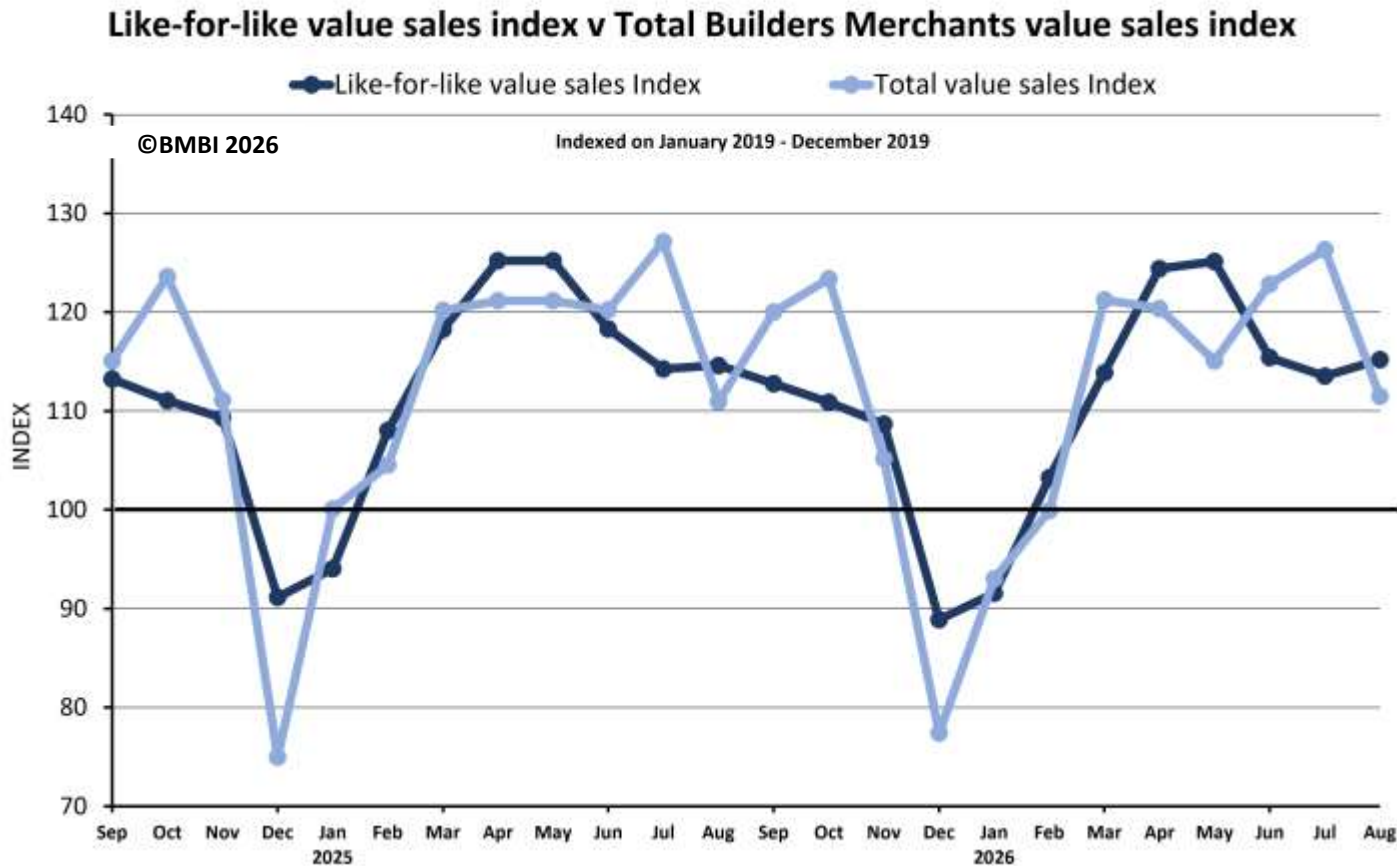
Monthly: Index

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

20 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 August 2026



August's **like-for-like value sales** Index was 115.2.

Latest month: Index by category

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

20 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.



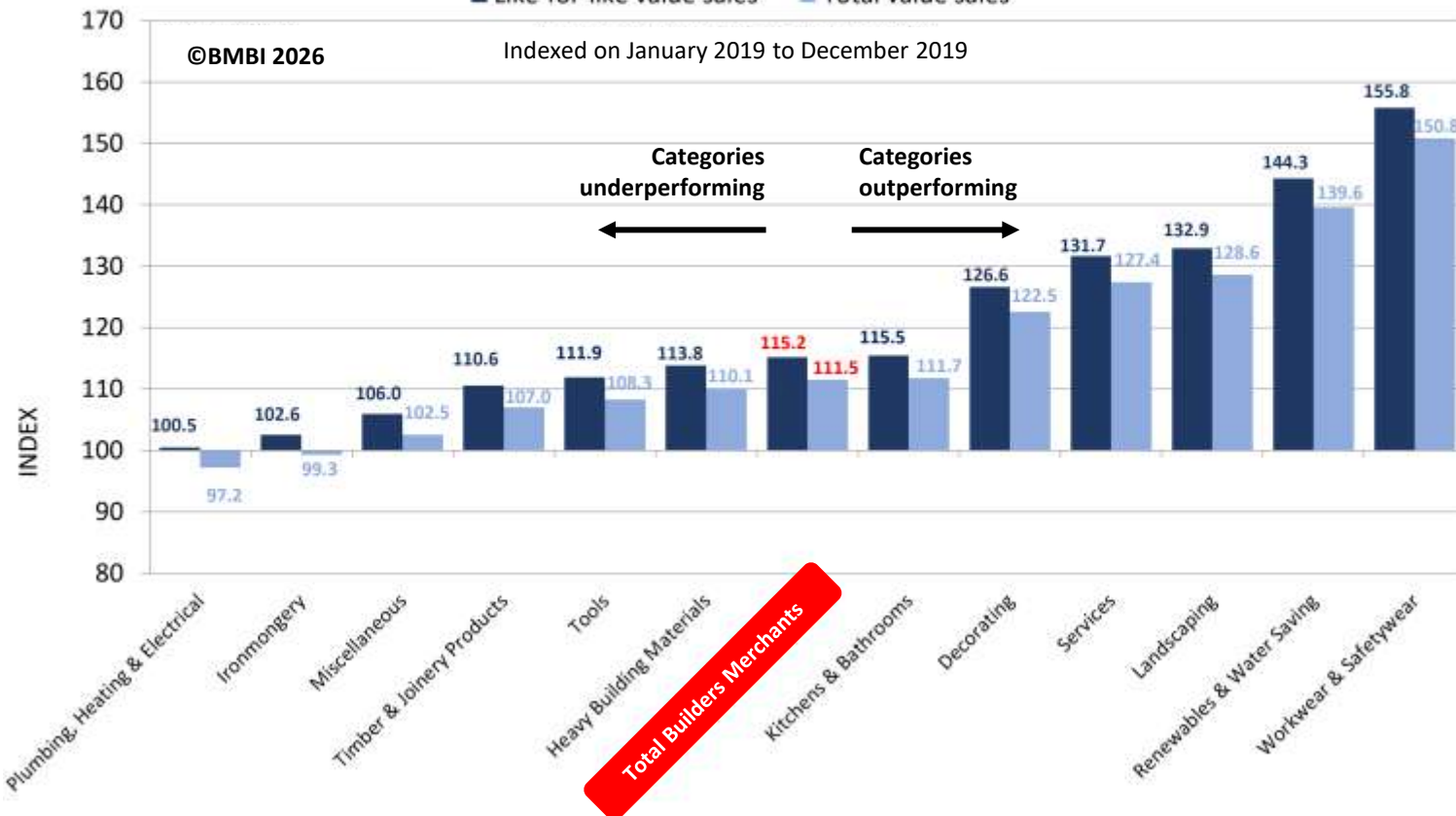
Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

August 2026 Index

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

©BMBI 2026

Indexed on January 2019 to December 2019



In like for like value,
Workwear &
Safetywear (155.8)
indexed the highest.

Plumbing, Heating &
Electrical (100.5)
indexed the lowest.

Monthly: Index by Categories

Like-for-like value sales

August 2025* - August 2026

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



MONTHLY LIKE-FOR-LIKE VALUE SALES INDEX	Index	2025					2026							
		Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Total Builders Merchants	100	114.6	112.7	110.9	108.7	88.9	91.6	103.2	113.9	124.4	125.1	115.4	113.5	115.2
Timber & Joinery Products	100	109.9	109.2	106.9	106.4	87.3	92.7	101.4	107.9	116.8	116.9	109.7	107.7	110.6
Heavy Building Materials	100	114.7	112.7	111.5	106.6	84.9	87.5	99.9	112.2	123.3	123.5	113.9	112.1	113.8
Decorating	100	124.9	122.0	119.6	121.5	103.4	105.1	115.9	123.8	130.2	131.8	123.3	124.6	126.6
Tools	100	112.7	114.1	115.1	118.1	95.9	103.5	114.7	119.0	119.8	119.2	108.8	107.2	111.9
Workwear & Safetywear	100	126.9	134.9	140.3	161.1	131.6	141.9	149.3	144.7	141.1	146.2	135.6	140.4	155.8
Ironmongery	100	104.1	104.7	104.2	105.6	91.2	97.8	103.3	107.5	111.4	111.0	103.2	105.0	102.6
Landscaping	100	130.2	115.2	107.1	92.2	70.4	69.9	89.3	124.1	158.3	166.6	142.4	138.4	132.9
Plumbing, Heating & Electrical	100	100.3	111.3	115.5	124.7	108.8	114.0	118.2	115.8	109.1	108.1	101.2	96.2	100.5
Renewables & Water Saving	100	142.2	145.8	146.4	163.7	142.0	154.2	182.6	178.3	155.8	147.2	143.1	141.0	144.3
Kitchens & Bathrooms	100	115.0	118.6	111.9	123.6	103.2	104.2	119.6	116.4	119.8	117.4	115.3	112.6	115.5
Miscellaneous	100	97.5	102.8	106.8	108.9	94.7	100.2	106.4	108.5	109.2	110.9	103.2	102.9	106.0
Services	100	121.9	116.2	115.8	118.2	113.1	100.5	115.9	124.7	135.4	136.2	126.3	127.0	131.7

*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 August 2026

Monthly: Index by Categories

Total value sales

August 2025* - August 2026

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



		2025						2026							
MONTHLY TOTAL VALUE SALES INDEX	Index	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	
Total Builders Merchants	100	110.9	120.0	123.4	105.2	77.4	93.0	99.9	121.2	120.4	115.1	122.8	126.3	111.5	
Timber & Joinery Products	100	106.3	116.2	118.9	102.9	76.0	94.2	98.1	114.8	113.0	107.5	116.8	119.9	107.0	
Heavy Building Materials	100	111.0	119.9	124.1	103.1	73.9	88.9	96.6	119.5	119.3	113.5	121.2	124.7	110.1	
Decorating	100	120.8	129.9	133.1	117.6	90.1	106.8	112.2	131.8	126.0	121.1	131.3	138.7	122.5	
Tools	100	109.0	121.4	128.1	114.3	83.5	105.2	111.0	126.7	116.0	109.6	115.8	119.3	108.3	
Workwear & Safetywear	100	122.8	143.6	156.1	155.9	114.6	144.2	144.5	154.1	136.5	134.5	144.4	156.3	150.8	
Ironmongery	100	100.8	111.5	116.0	102.2	79.4	99.4	100.0	114.5	107.8	102.1	109.8	116.8	99.3	
Landscaping	100	126.0	122.6	119.2	89.2	61.3	71.1	86.4	132.1	153.2	153.2	151.6	154.0	128.6	
Plumbing, Heating & Electrical	100	97.1	118.5	128.6	120.7	94.8	115.8	114.4	123.2	105.6	99.4	107.8	107.0	97.2	
Renewables & Water Saving	100	137.6	155.2	162.9	158.4	123.6	156.7	176.7	189.8	150.8	135.3	152.3	156.9	139.6	
Kitchens & Bathrooms	100	111.3	126.2	124.5	119.6	89.9	105.8	115.8	123.9	115.9	107.9	122.8	125.3	111.7	
Miscellaneous	100	94.4	109.4	118.8	105.4	82.5	101.9	103.0	115.6	105.7	102.0	109.9	114.5	102.5	
Services	100	118.0	123.7	128.9	114.3	98.5	102.1	112.1	132.7	131.0	125.2	134.4	141.3	127.4	

*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 August 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 20	Sep	Oct	Nov	Dec

Quarterly

Index: 62

2024				2024		2024
Q1 63	Q2 62	Q3 65	Q4 61	H1 125	H2 126	251
2025				2025		2025
Q1 63	Q2 61	Q3 65	Q4 61	H1 124	H2 126	250
2026				2026		2026
Q1 63	Q2 61	Q3	Q4	H1 124	H2	



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

NiQ GfK's Definition of Builders Merchant Panel

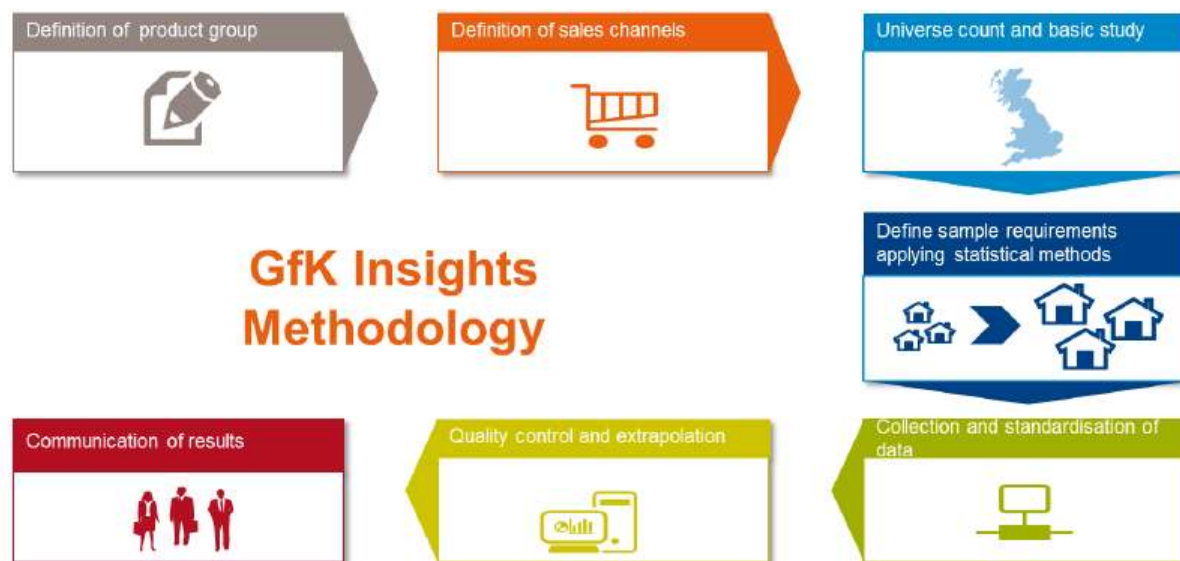


Generalist Builders Merchants definition:

- Builders 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 and 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

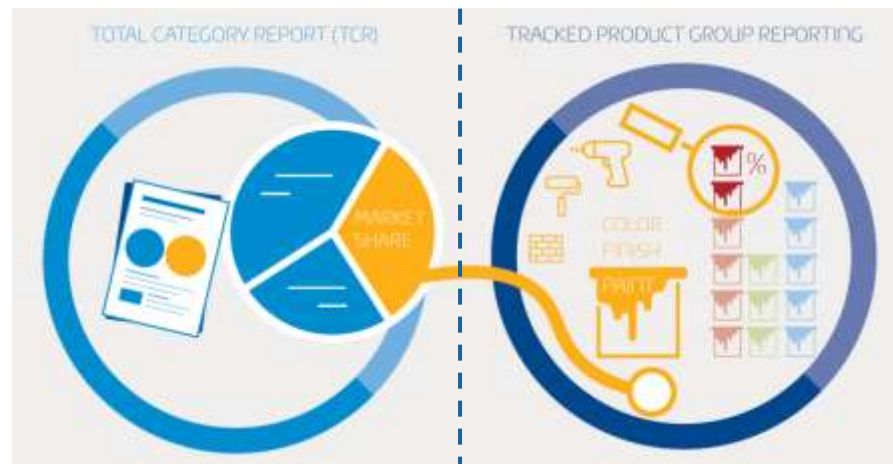
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

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.