

“building **excellence**  
in materials supply”

# Builders Merchant Building Index



## Monthly report for November 2022

(Published 24 January 2023)

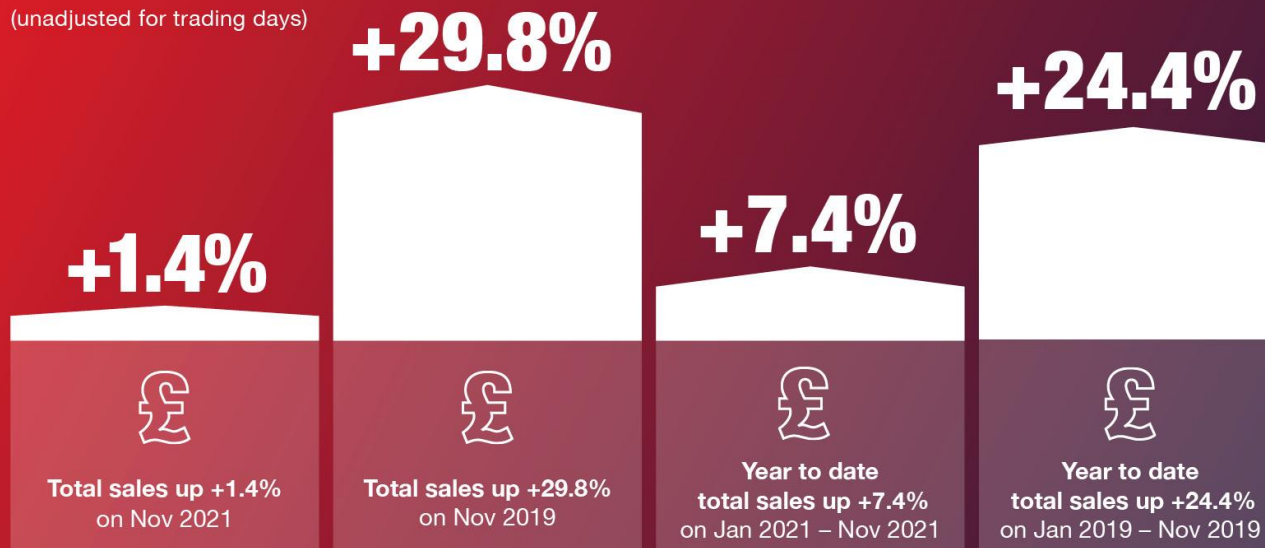
# Highlights

November's value sales were up +1.4% compared with November 2021, and +29.8% higher than pre-Covid November 2019. Full comment on pages 7 and 8.

## BMBI Report

### November 2022 Highlights

(unadjusted for trading days)



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

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“ November sales were up +1.4%, but volume was down -13.6% with +17.3% price inflation. ”

Note: As one or two year comparisons are still likely to produce some unusual differences, we are comparing figures with 2019, where possible, to give a pre-Covid three-year comparison

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# Introduction:

## Builders Merchant Building Index



This **Builders Merchant Building Index (BMBI)** report contains data from GfK's ground-breaking Builders Merchants Panel, which analyses data from over 80% of generalist builders' merchants' sales throughout Great Britain. 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 July 2014 to June 2015. This trend series gives the industry access to far more accurate and comprehensive insights than that available to other construction sectors.

### Executive Summary

Short of time and just want to read the headlines? Download an Executive Summary that provides a snapshot of value sales and trends from Britain's Builders' Merchants for November 2022 [here](#).

### BMBI Expert Panel

MRA Research produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands. **Meet the Experts and read their comments on pages 5 and 6 of this report or read their previous comments [here](#).**

### Recognition for BMBI

One of the aims of BMBI is to reach across and beyond construction. It's now syndicated to a growing number of trade magazines in different sectors on a regular basis. Outside the industry, economists, banks, consultancies, investment bodies and the big accountants regularly refer to it and BMBI is referenced alongside the Office for National Statistics (ONS) data in the Government **Department for Business, Energy and Industrial Strategy (BEIS)** 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. GfK insights go much deeper and include sales value data. GfK can quantify market values and drill down into contributing categories, tracing product group performance, to focus on aspects that are critical to you.

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.van-der-ryst@gfk.com](mailto:emile.van-der-ryst@gfk.com).

# The Expert Panel

## Speaking for their markets - 1



The Builders Merchant Building Index (BMBI) includes a growing 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 Q3 2022 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: Q3 2022 Report](#)

### Expert for Bricks & Roof Tiles:



**Kevin Tolson**  
Commercial Director  
Wienerberger UK

[Read latest Comment: Q3 2022 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q3 2022 Report](#)

### Expert for Civils & Green Infrastructure:



**Clark McAllister**  
Sales Director Polypipe Civils &  
Green Urbanisation

[Read latest Comment: Q3 2022 Report](#)

### Expert for Fasteners and Fixings:



**Ian Doherty**  
Chief Executive  
Owlett-Jaton

[Read latest Comment: Q3 2022 Report](#)

### Expert for Wood-Based Panels:



**Simon Woods**, European Sales Marketing  
& Logistics Director  
West Fraser (formerly known as Norbord)

[Read latest Comment: Q3 2022 Report](#)

# The Expert Panel

## Speaking for their markets - 2

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q3 2022 Report](#)

### Expert for PVC-U Windows & Doors:



**Kevin Morgan**  
Group Commercial Director  
The Crystal Group

[Read latest Comment: Q3 2022 Report](#)

### Expert for Shower Enclosures and Showering:



**Darren Bedford**  
Sales Director  
Lakes

[Read latest Comment: Q3 2022 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q3 2022 Report](#)

### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Hanson Cement

[Read latest Comment: Q3 2022 Report](#)

### Expert for Paint:



**Paul Edworthy**  
Commercial Lead  
Dulux Trade

[Read latest Comment: Q3 2022 Report](#)

### Expert for Website & Product Data Management Solutions:



**Andy Scothern**  
Managing Director  
eCommonSense

[Read latest Comment: Q3 2022 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q3 2022 Report](#)

### Expert for Adhesives & Sealants:



**Mathew Whitehouse**  
Marketing Director  
Bostik UK

[Read latest Comment: Q3 2022 Report](#)

## **November sales up +1.4% year-on-year, with volume down -13.6% and price up +17.3%**

Total Builders Merchants value sales were up +1.4% in November 2022 compared with the same month last year. Volume sales were -13.6% lower with price up +17.3%. There was no difference in trading days. Nine of the twelve categories sold more. Renewables & Water Saving (+37.9%). Plumbing, Heating & Electrical (+17.5%), Workwear & Safetywear (+16.6%) and Decorating (+15.3%) and Kitchens & Bathrooms (+14.8%) grew most. Timber & Joinery Products (-12.0%) was weakest.

### **November 2022 v November 2019**

Total value sales in November 2022 were +29.8% higher than the same month three years ago (a more normal pre-Covid year). Volume sales fell by -4.1%, while prices were up +35.3%. With one more trading day this year, like-for-like sales (which take trading day differences into account) were +23.9% higher. All categories sold more. Four of the twelve categories performed better than Merchants overall. Renewables & Water Saving (+58.1%) was strongest. Landscaping (+39.7%), Timber & Joinery Products (+33.2%) and Heavy Building Materials (+31.1%) also grew more.

### **November 2022 v October 2022**

Total Merchants sales were -2.6% lower in November 2022 than in October 2022. Volume sales were -7.2% lower with price up +4.9%, with one more trading day this month, like-for-like sales were -7.0% lower. Workwear & Safetywear (+11.2%) was up the most, followed by Kitchens & Bathrooms (+10.0%). Seasonal category Landscaping (-13.1%) was weakest.

### **November Index**

November's overall BMBI index was 147.1, helped by Plumbing, Heating & Electrical (168.4). With one more trading day, the like-for-like index was 138.7. All categories exceeded 100, including Kitchens & Bathrooms (161.4), Timber & Joinery Products (160.4), Ironmongery (144.7), Heavy Building Materials (144.0) and Landscaping (132.7). Tools (111.3) increased the least.

### **Last three months, year on year**

Total sales in September to November 2022 were +3.9% higher than in September to November 2021, with price inflation of +15.1%, and volume down -9.7%. With one less trading day in this recent period, like-for-like sales were +5.6% higher. Ten of the twelve categories sold more. Renewables & Water Saving (+54.8%), Workwear & Safetywear (+22.2%), and Plumbing, Heating & Electrical (+16.7%) did best. Timber & Joinery Products (-11.1%) was weakest.

### **Last three months v 3 years ago**

Compared with the same months three years ago, sales in September to November 2022 were +25.7% higher than in September to November 2019, driven by price inflation (+33.7%) not volume (-6.0%). With one less trading day this period, like-for-like sales were +27.7% higher. All categories sold more. Three categories stood out: Renewables & Water Saving (+58.3%) and Landscaping (+35.2%) and Timber & Joinery Products (+30.1%).

Builders Merchant  
November value  
sales were up +1.4%  
compared to  
November 2021.

Prices rose +17.3%,  
while volume fell by  
-13.6%.

Overview continues on the next page...

# Overview - 2

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## **Last three months v previous three months**

Total sales in September to November 2022 were -2.1% lower than in June to August 2022, driven by price inflation (+3.5%) with volume down (-5.4%). With one more trading day this period, like-for-like sales were -3.7% lower. Eight of the twelve categories sold more. Renewables & Water Saving (+30.8%), Plumbing, Heating & Electrical (+22.7%), Decorating (+6.7%) and Ironmongery (+4.9%) grew more than other categories. Seasonal category Landscaping (-24.0%) was weakest.

## **Year to date, year-on-year**

The current year to date, January to November 2022 was +7.4% higher than in the previous period, January to November 2021. Volume sales were -7.4% lower with price up +16.0%. With two less trading days this year, like-for-like sales were +8.4% higher. Eleven of the twelve categories sold more. Renewables & Water Saving (+30.7%) and Kitchens & Bathrooms (+19.5%) were strongest. Plumbing, Heating & Electrical (+14.4%), Heavy Building Materials (+12.1%) also grew more than merchants overall. Timber & Joinery Products sold less (-1.3%).

## **MAT**

Total Merchants sales in December 2021 to November 2022 were +7.9% higher than in December 2020 to November 2021, with price inflation of (+16.1%), and volume (-7.1%). With two less trading days this year, like-for-like sales were +8.8% higher. Eleven of the twelve categories sold more. Renewables & Water Saving (+29.8%) and Kitchens & Bathrooms (+19.0%) did best. Plumbing, Heating & Electrical (+14.2%), Heavy Building Materials (+12.3%), Workwear & Safetywear (+11.1%), Decorating (+10.9%), Ironmongery (+8.2%) and Tools (+5.1%) also did well. Timber & Joinery Products was flat (-0.1%).

## **Year to date v 2019**

Sales in the current year to date, January to November 2022 were +24.4% higher compared to three years ago - January to November 2019. Price inflation was +29.2%) and volume was down -3.7%). With three less trading days in the most recent period, like-for-like sales were +26.1% higher. All categories sold more. Landscaping (+38.1%) was strongest. Timber & Joinery Products (+35.1%) and Renewables & Water Saving (+34.9%) also performed better than Merchants overall.

## **3-year MAT**

Total Merchants sales in December 2021 to November 2022 were +24.5% higher than in the 12 months December 2018 to November 2019. With one less trading day in the most recent period, like-for-like growth was +25.0%. All categories sold more. Landscaping (+38.4%), Timber & Joinery Products (+35.8%) and Renewables & Water Saving (+34.4%) grew faster than Merchants overall. All other categories saw lower growth including Heavy Building Materials (+22.1%), Kitchens & Bathrooms (+20.3%) and Decorating (+9.3%). Tools (+4.4%) grew more slowly.

Sales in the current year to date, January to November 2022 were +24.4% higher compared to three years ago, January to November 2019 (pre-Covid).

Price inflation was +29.2%, and volume was -3.7% down.



# Overview - 3

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**NOTE from Emile van der Ryst, GfK:**

We have done some minor category & branch reclassifications in the past month, which means that small changes will be seen in the reporting this month. Using the calendar quarter of July – September (Q3) as an example when comparing the September and October reports with each other, some of the changes seen in the major categories are:

Category	Q3 value growth in Sep report	Revised Q3 value growth
<b>Total Builders Merchants</b>	4.3%	<b>4.4%</b>
<b>Heavy Building Materials</b>	11.9%	<b>12.2%</b>
<b>Timber &amp; Joinery</b>	-11.1%	<b>-11.0%</b>
<b>Landscaping</b>	-1.3%	<b>-1.2%</b>

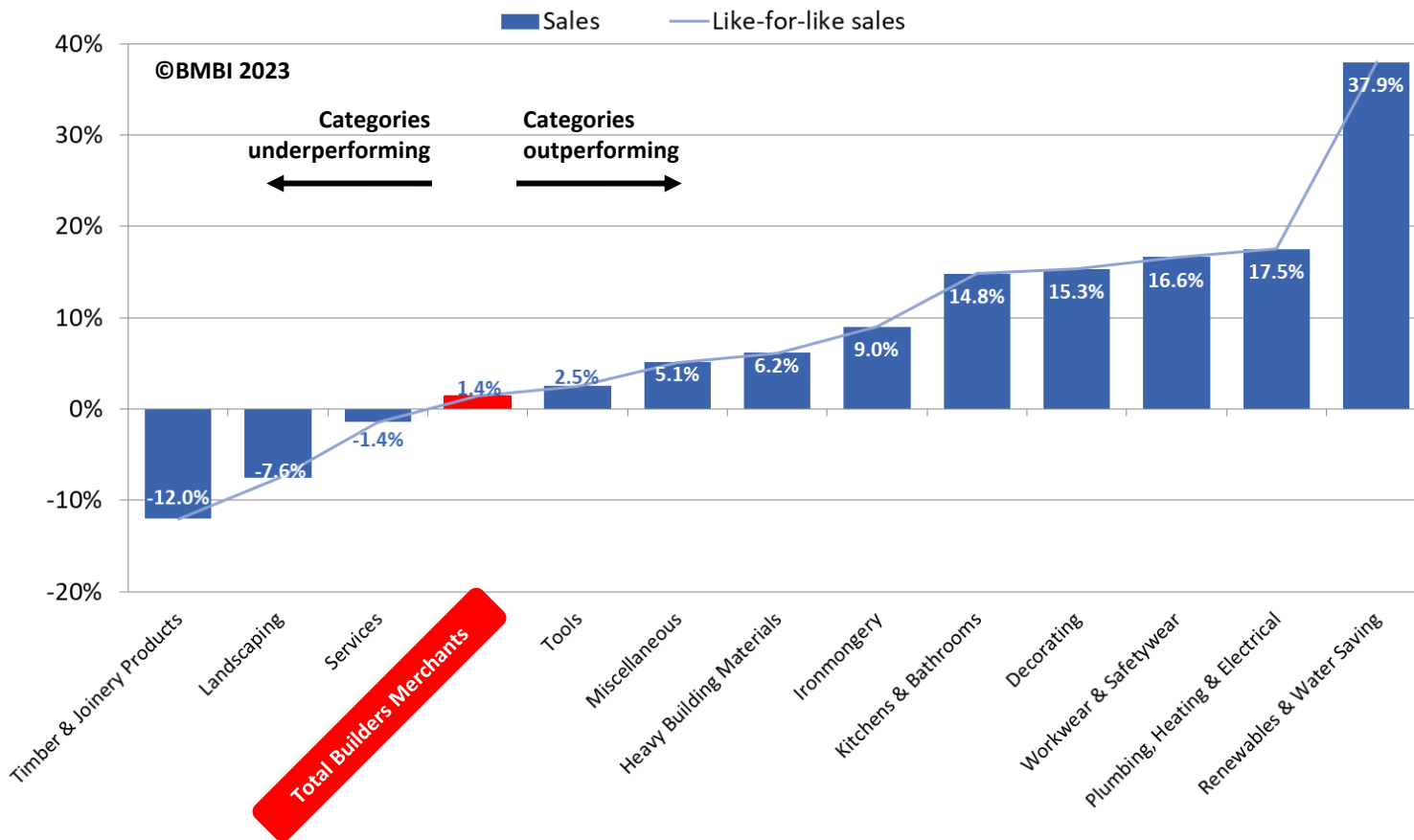
# Monthly: This year v last year

## November 2022 sales

There was no difference in trading days this year and last year (22). Like-for-like sales take trading day differences into account.



### November 2022 v November 2021



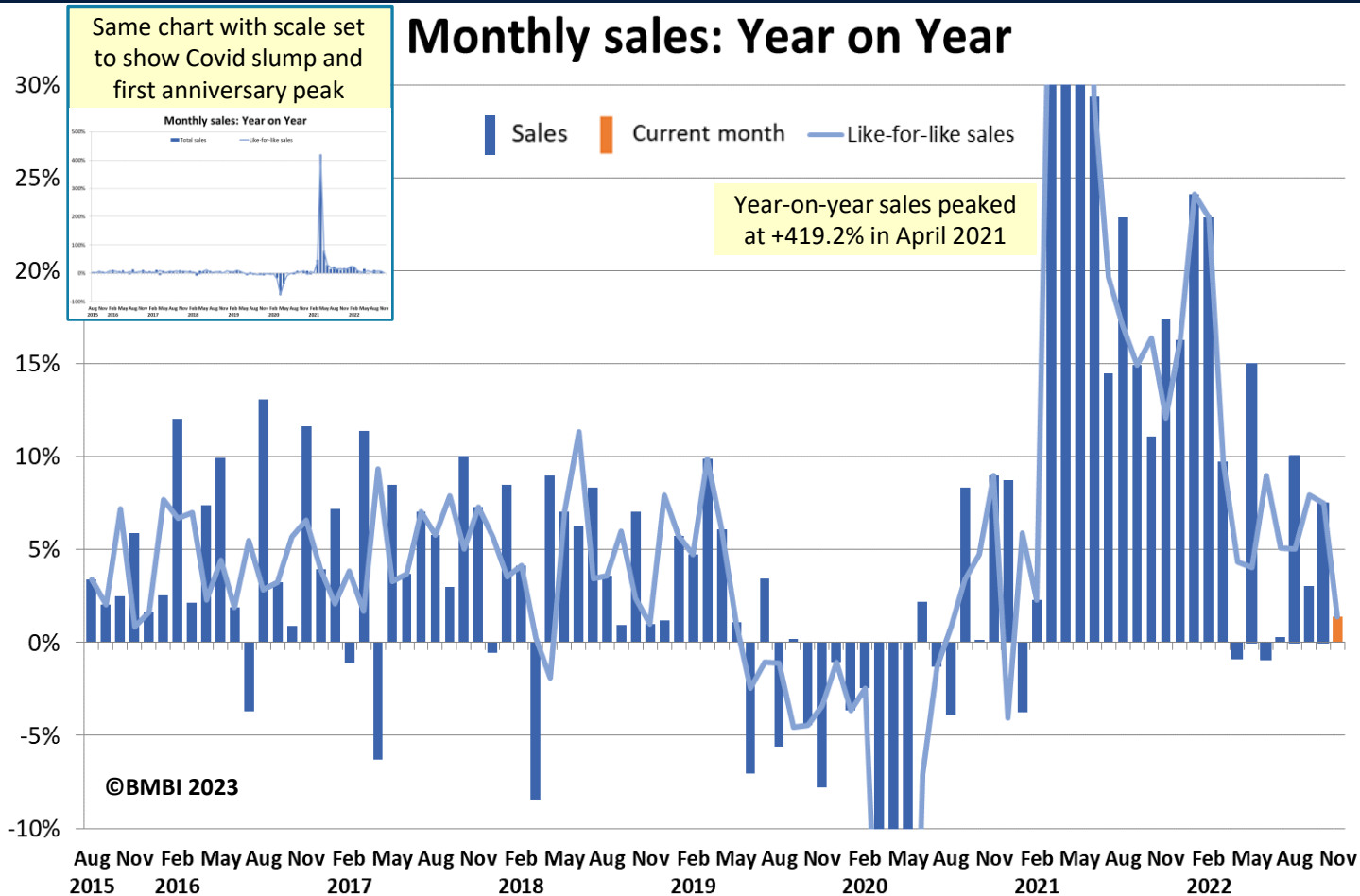
Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Total Builders Merchants value sales were up +1.4%.  
Nine of the twelve categories sold more.

# Monthly: Year on Year

## Sales and Like-for-like sales

There was no difference in trading days this year and last year (22). Like-for-like sales take trading day differences into account.



Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2022

Sales growth in November was up +1.4% compared to the same month last year.

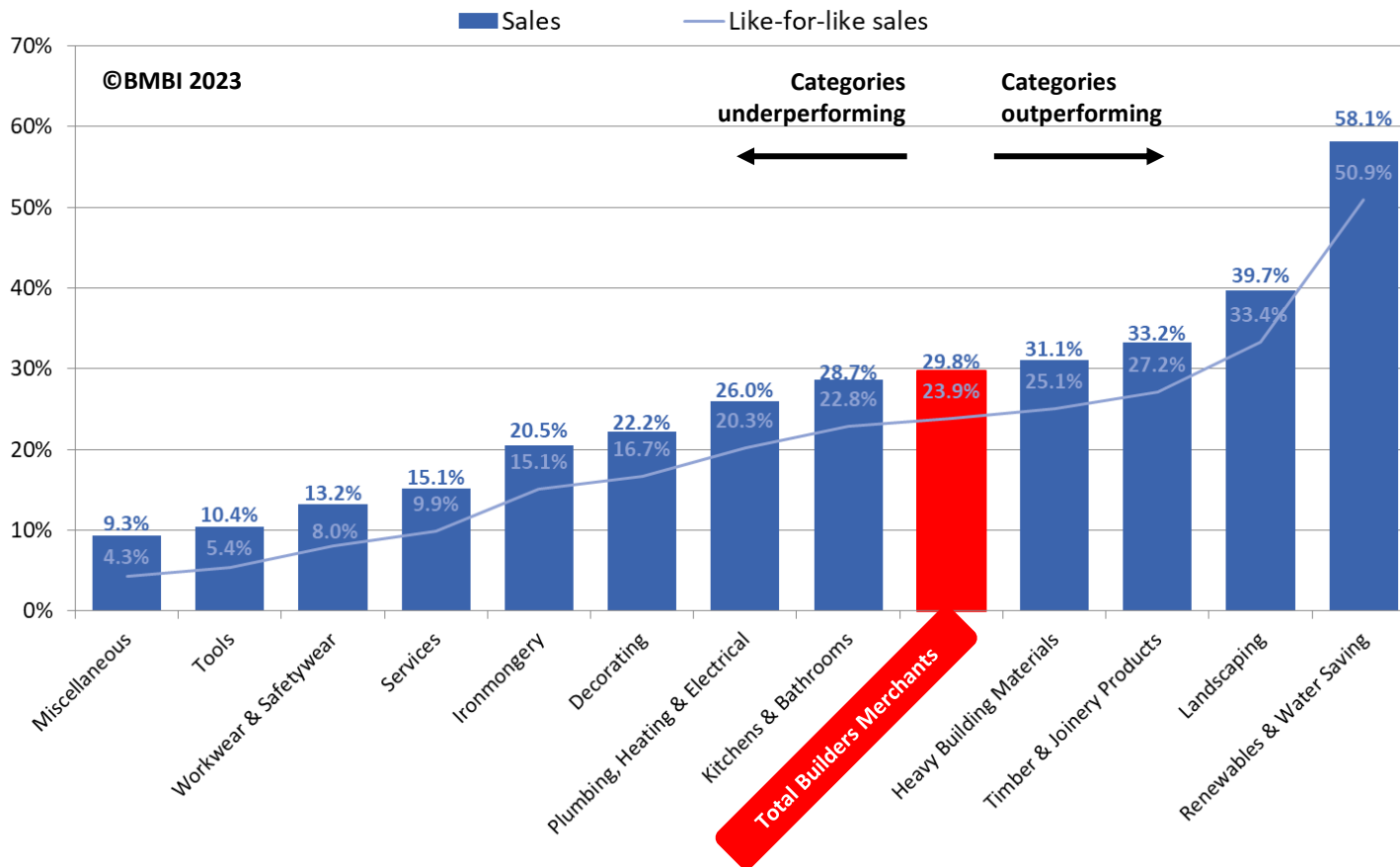
# Monthly: This year v 2019

## November 2022 3-year sales

22 trading days this year v 21 trading days in 2019. Like-for-like sales take trading day differences into account.



### 3-year comparison: November 2022 v November 2019



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Total value sales in November 2022 were +29.8% higher than the same month three years ago (a more normal year pre Covid).

Four of the twelve categories grew faster than Merchants overall.

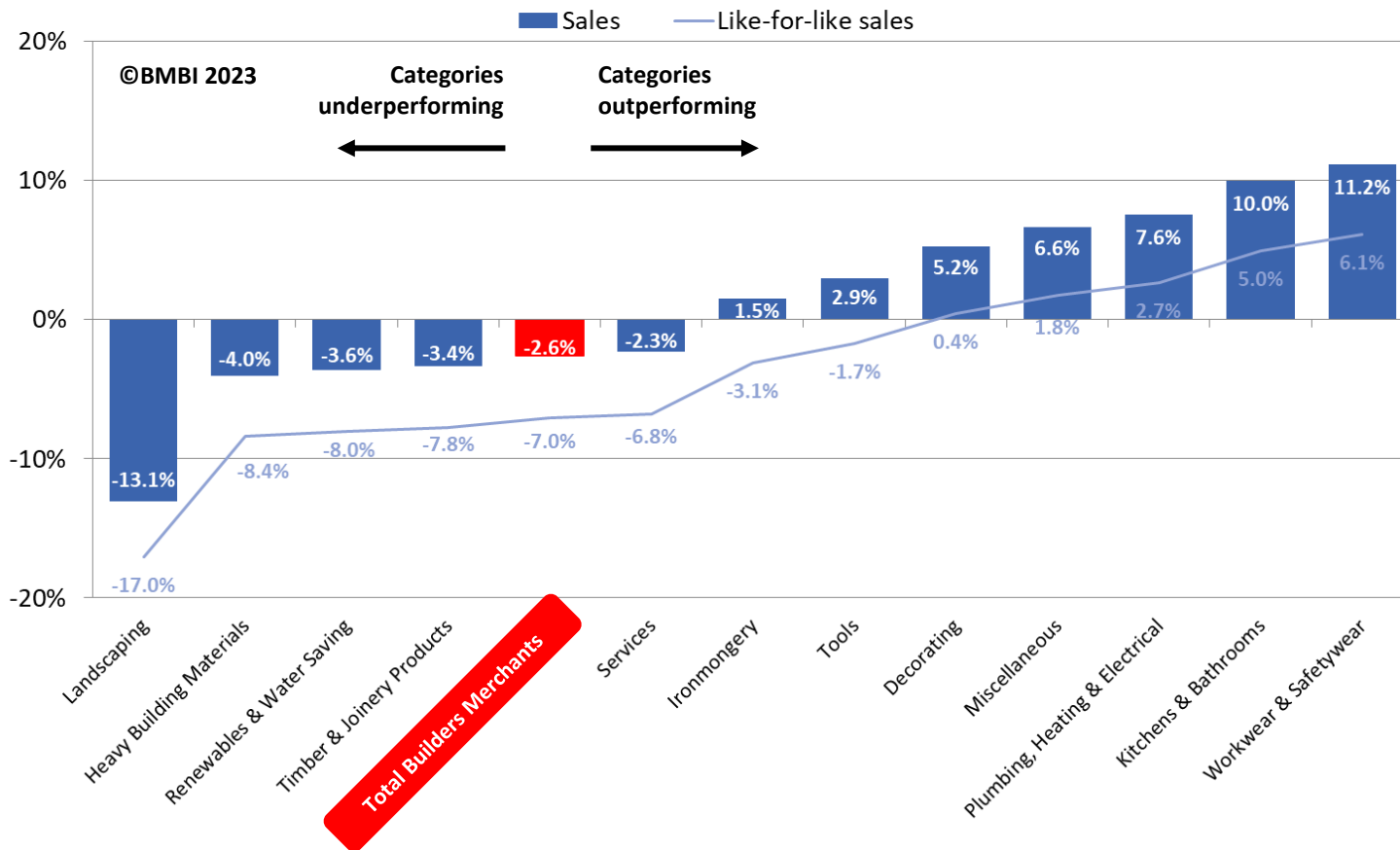
# Monthly: This month v last month

## November 2022 sales

22 trading days this month v 21 trading days last month. Like-for-like sales take trading day differences into account.



### November 2022 v October 2022



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Total November sales were -2.6% lower than in October.

Workwear & Safetywear (+11.2%) grew most followed by Kitchens & Bathrooms (+10.0%).

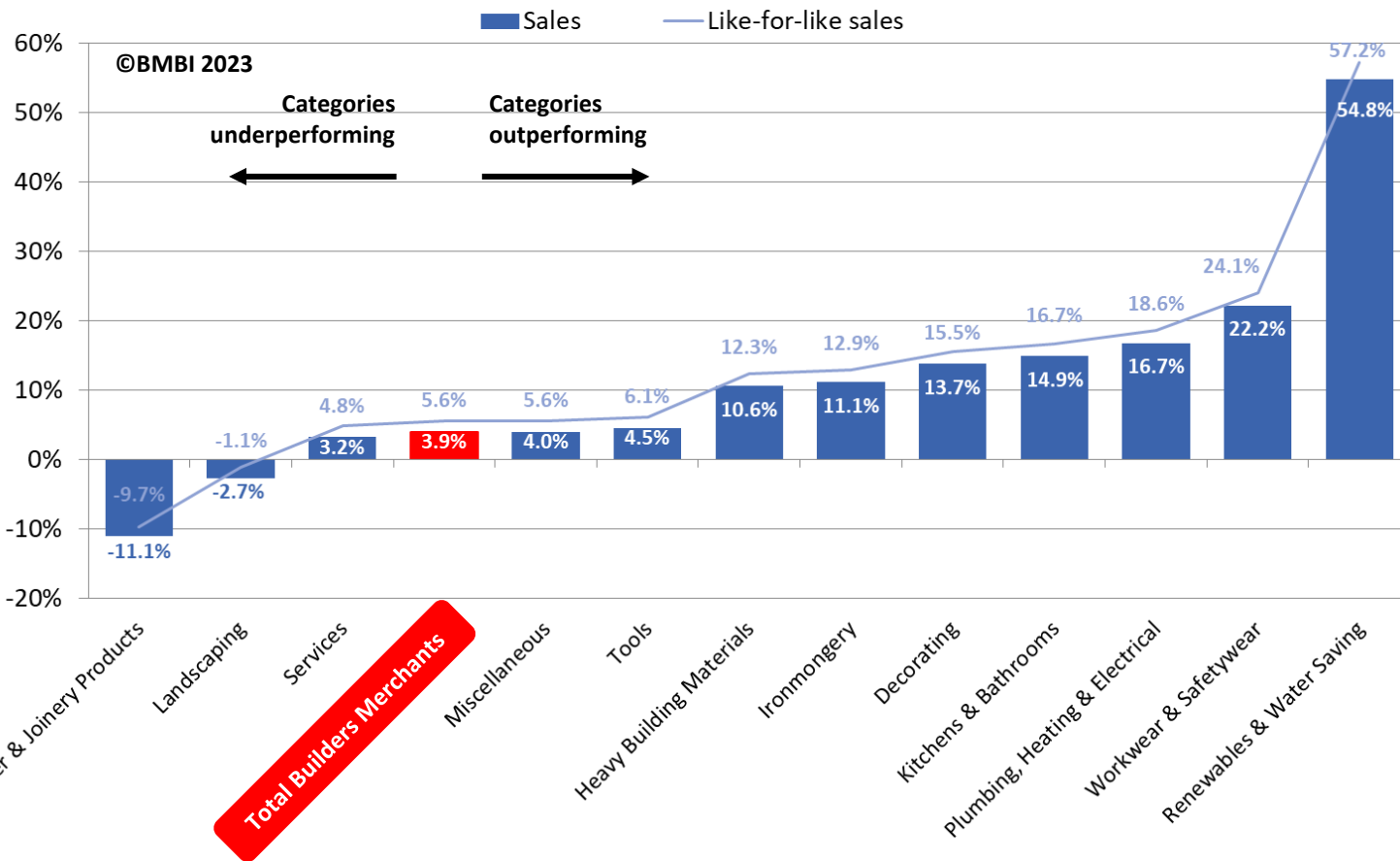
# Latest 3 months: v last year

## September 2022 to November 2022 sales

64 trading days this year v 65 trading days last year. Like-for-like sales take trading day differences into account.



### 3 months Sep 22 to Nov 22 v 3 months Sep 21 to Nov 21



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Sales in the last three months were +3.9% higher than in the same period last year.

Renewables & Water Saving (+54.8%) grew fastest.

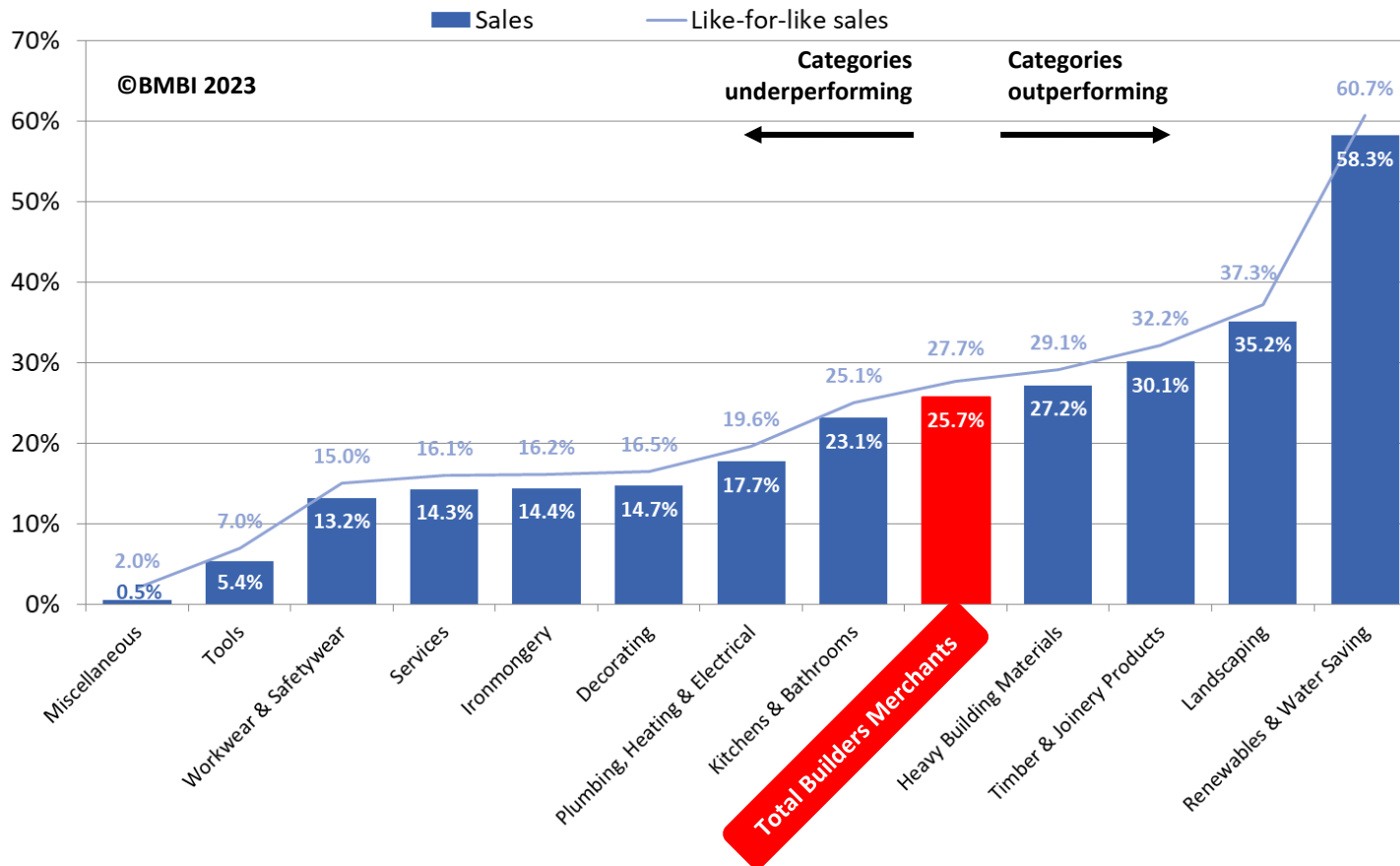
# Latest 3 months: v 2019

## September 2022 to November 2022 3-year sales

64 trading days this year v 65 trading days in 2019. Like-for-like sales take trading day differences into account.



### 3-year comparison: Sep 22 to Nov 22 v Sep 19 to Nov 19



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Compared with the same months three years ago, sales in September 2022 to November 2022 were +25.7% higher than in September 2019 to November 2019.

All categories sold more. Renewables & Water Saving (+58.3%) was strongest.

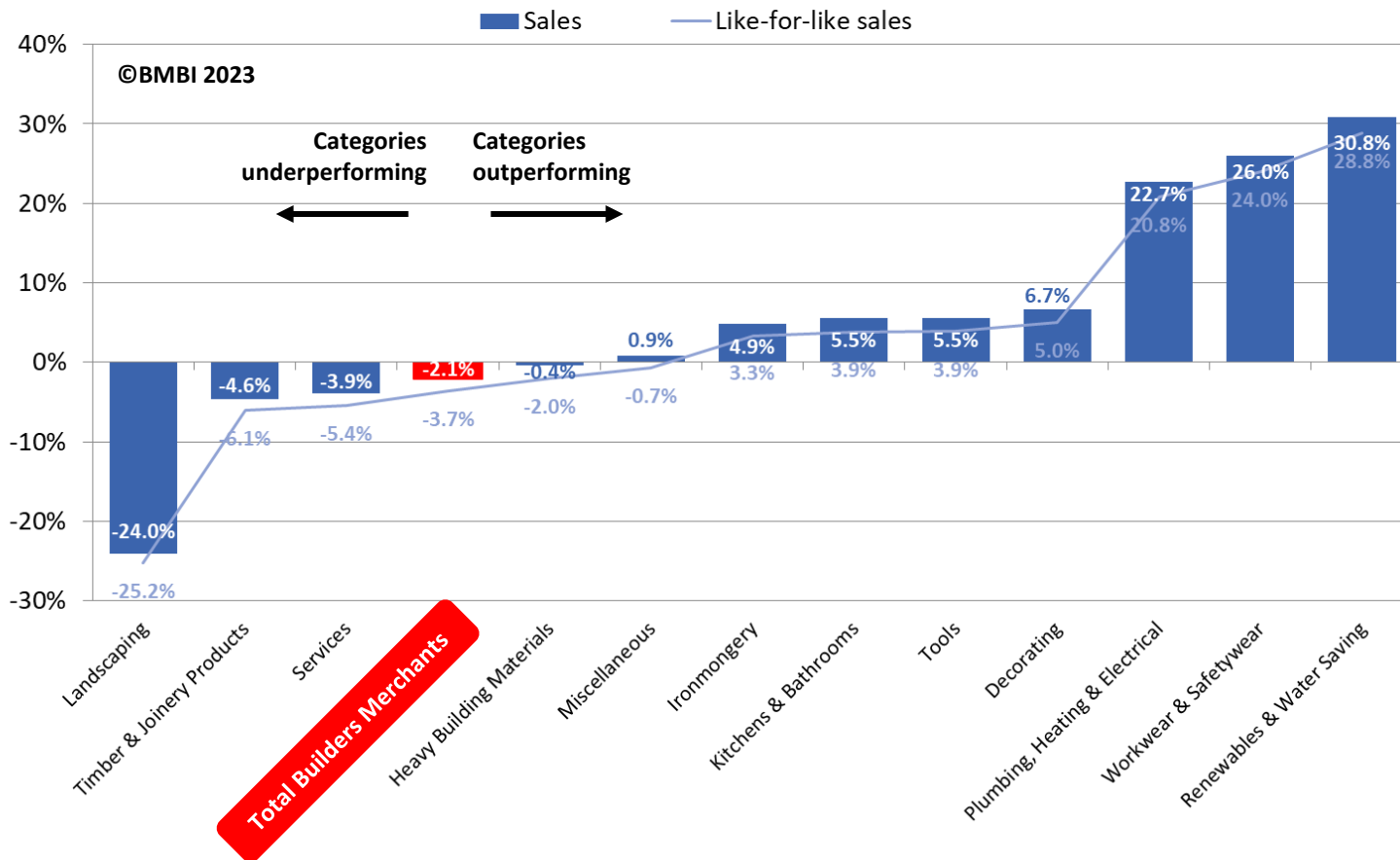
# Latest 3 months: v previous 3 months

## September 2022 to November 2022 sales

64 trading days in the latest three months v 63 trading days in the previous three months. Like-for-like sales take trading day differences into account.



### 3 months Sep 22 to Nov 22 v 3 months Jun 22 to Aug 22



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Total sales in the last three months were -2.1% lower than in the previous three months.

Eight of the twelve categories sold more.



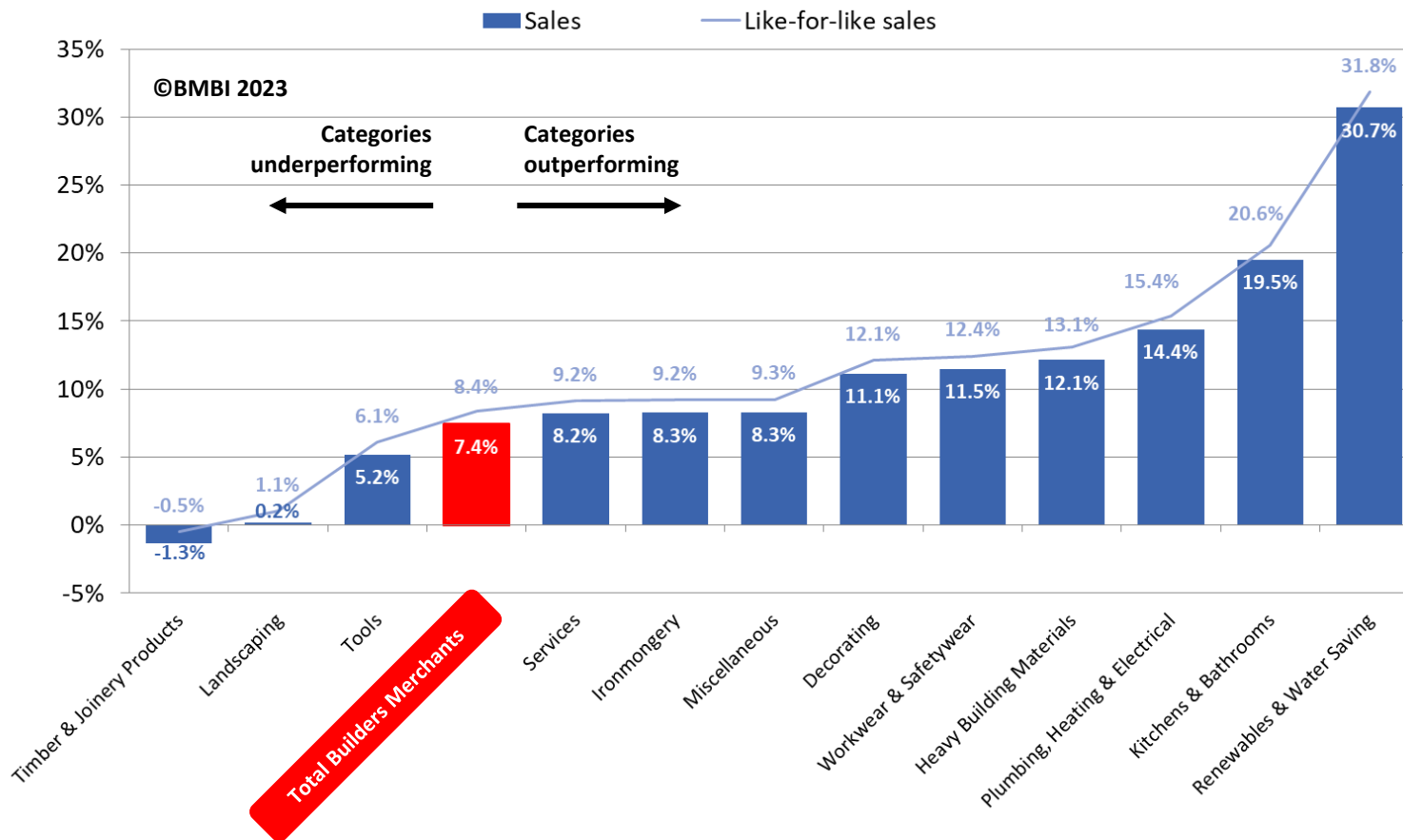
# Year to date: v 2021

## Last 11 months sales and like-for-like sales

230 trading days this year v 232 trading days last year. Like-for-like sales take trading day differences into account.



### Year to date: Jan 22 to Nov 22 v Jan 21 v Nov 21



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Eleven of the twelve categories sold more. Nine categories performed better than Merchants overall led by Renewables & Water Saving (+30.7%).

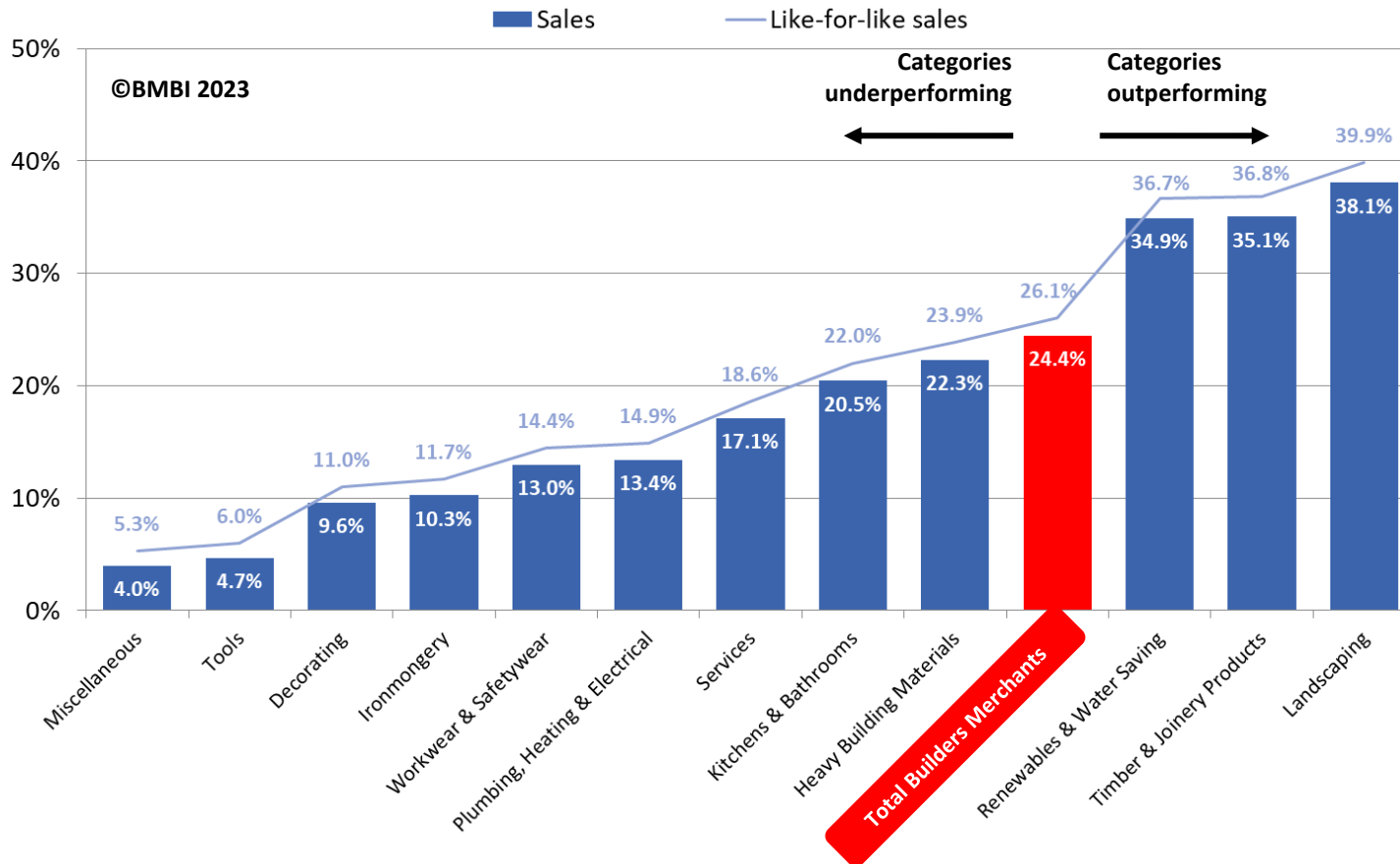
# Year to date: v 2019

## Last 11 months sales and like-for-like sales

230 trading days this year v 233 trading days in 2019. Like-for-like sales take trading day differences into account.



### 3-year comparison: Jan 22 to Nov 22 v Jan 19 to Nov 19



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Sales in the last 11 months were +24.4% higher than the same period three years ago.

All categories sold more. Landscaping (+38.1%) was strongest.

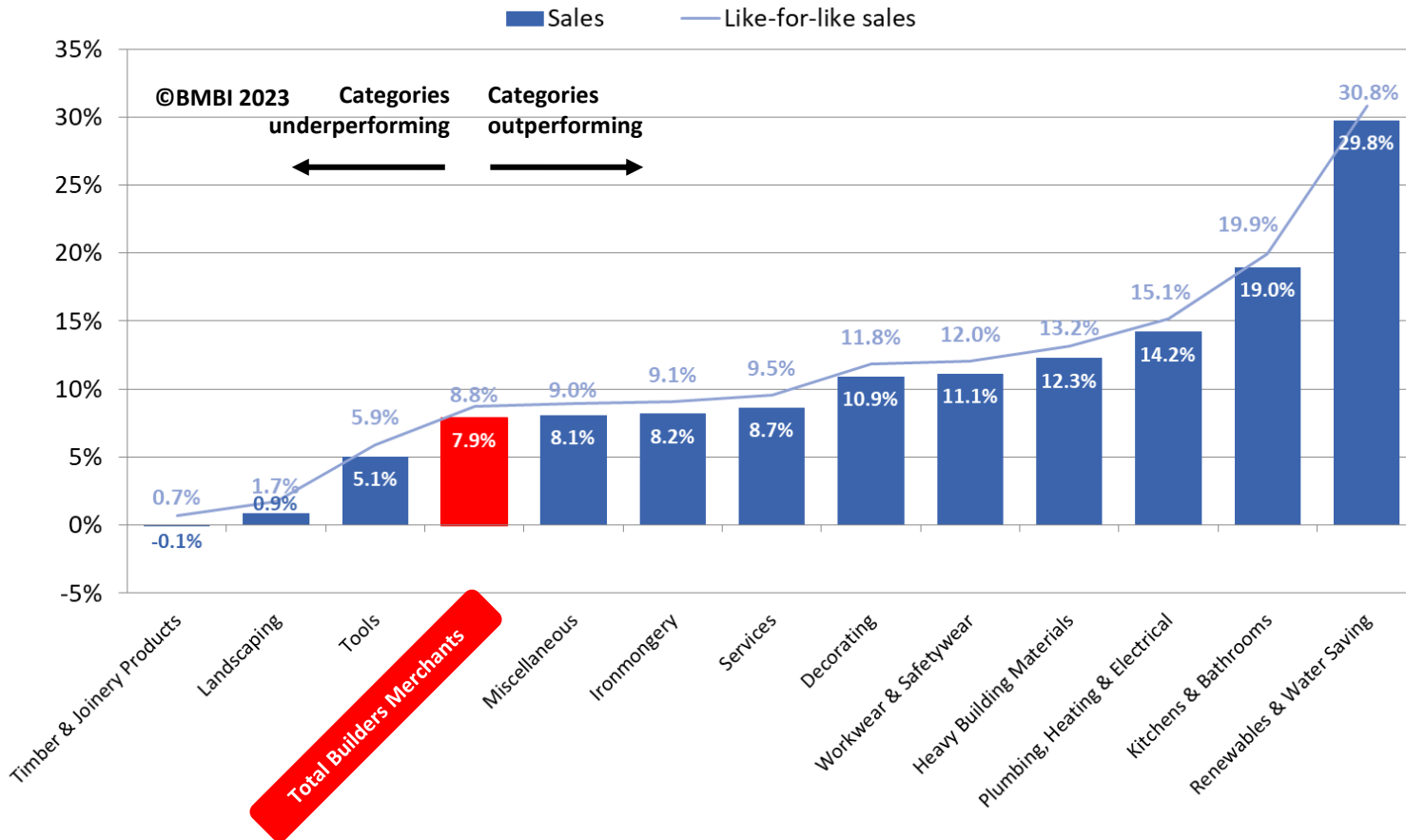
# Last 12 Months: Year on Year

## Sales and like-for-like sales

247 trading days this year v 249 trading days last year. Like-for-like sales take trading day differences into account.



### 12 months Dec 21 to Nov 22 v 12 months Dec 20 to Nov 21



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Sales in the twelve months to November 2022 were +7.9% higher than Covid-affected December 2020 to November 2021.

Eleven of the twelve categories sold more led by Renewables & Water Saving (+29.8%).

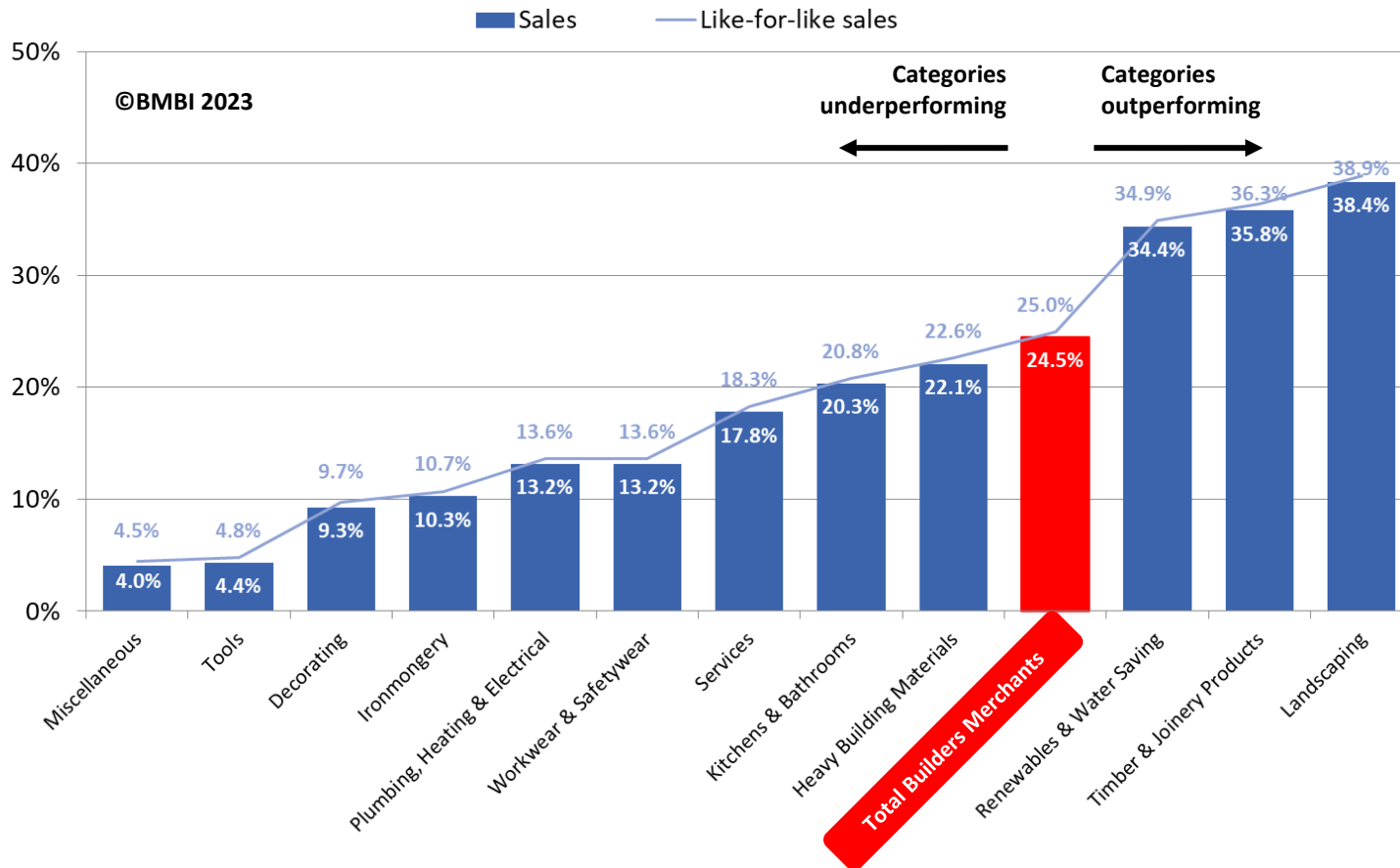
# Last 12 Months: v 2019

## Sales and like-for-like sales

247 trading days in the last 12 months v 248 trading days in 2019. Like-for-like sales take trading day differences into account.



### 12 months Dec 21 to Nov 22 v 12 months Dec 18 to Nov 19



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

Total sales in the last twelve months were +24.5% higher than the same period three years ago.

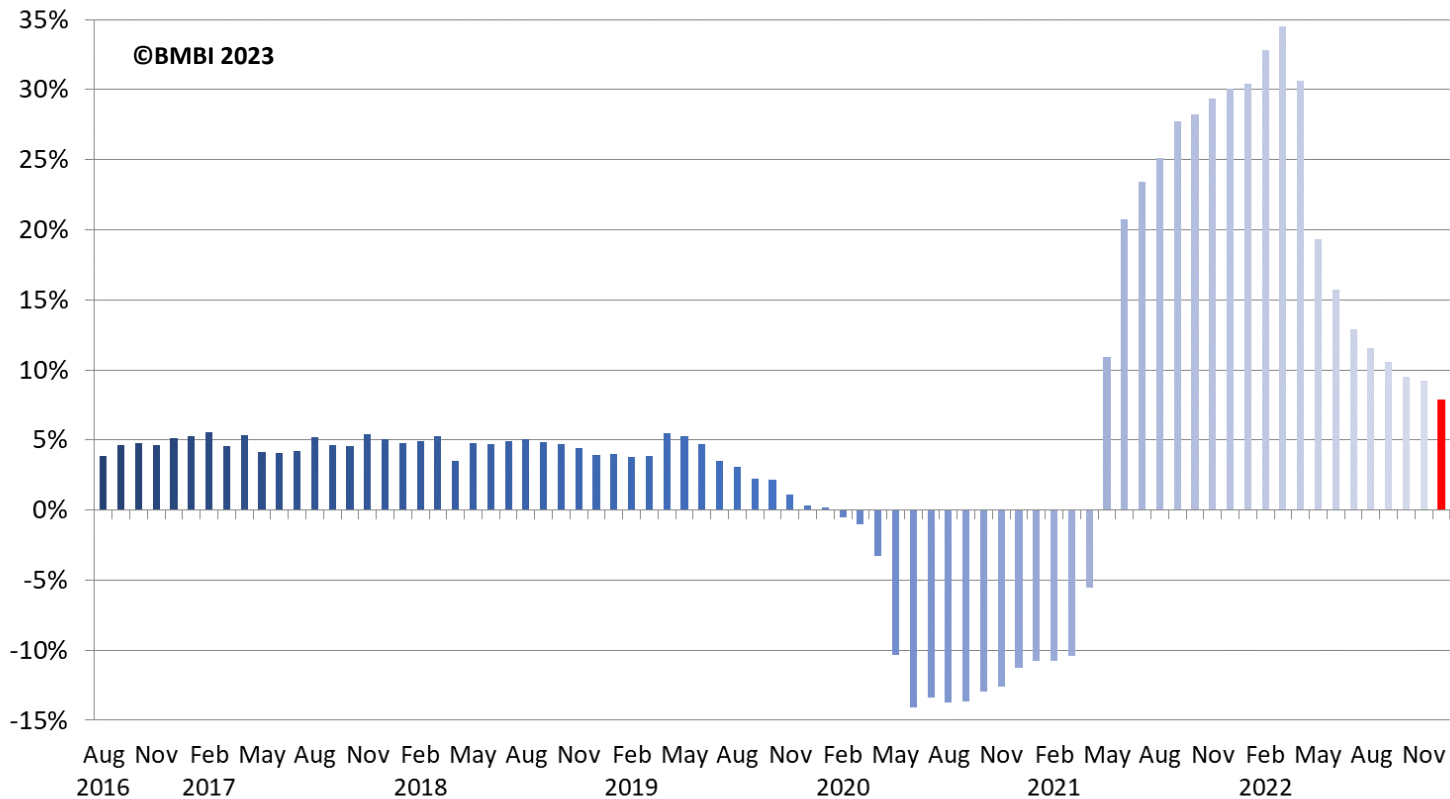
All categories sold more. Landscaping (+38.4%) was strongest.

# 12 months: Year on Year

MAT sales



## MAT: Total Builders Merchants August 2016 to November 2022



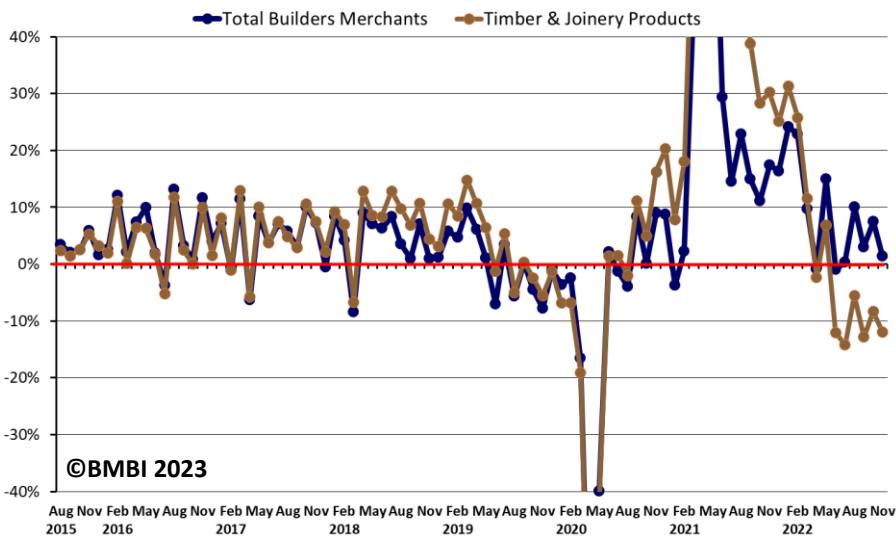
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2022

Sales in the past 12 months December 2021 to November 2022 were +7.9% higher than in December 2020 to November 2021, although the rate of growth continued to reduce.

# Monthly Year-on-year

November 2022

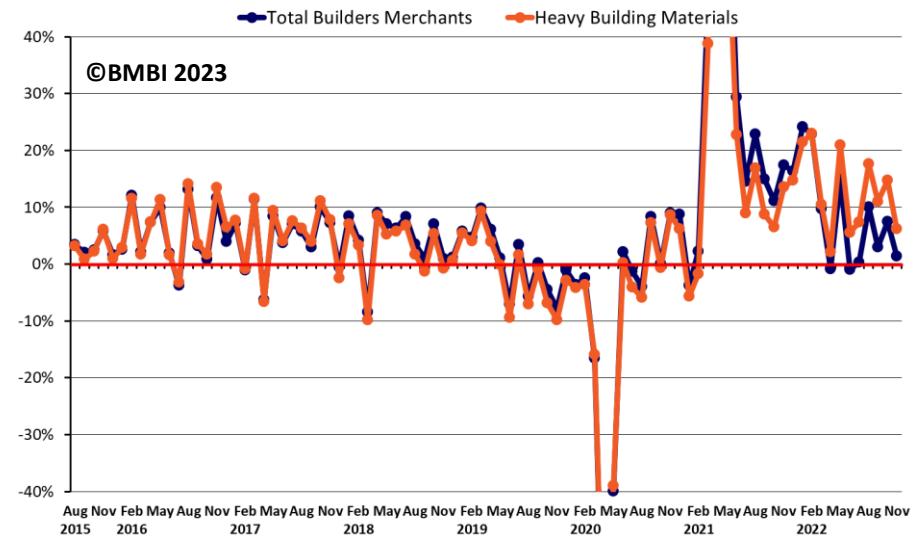
## Timber & Joinery Products - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Timber & Joinery Products	-79.0%
	Total Builders Merchants	-76.5%
April 2021 peak:	Timber & Joinery Products	+555.8%
	Total Builders Merchants	+419.2%

## Heavy Building Materials - Monthly



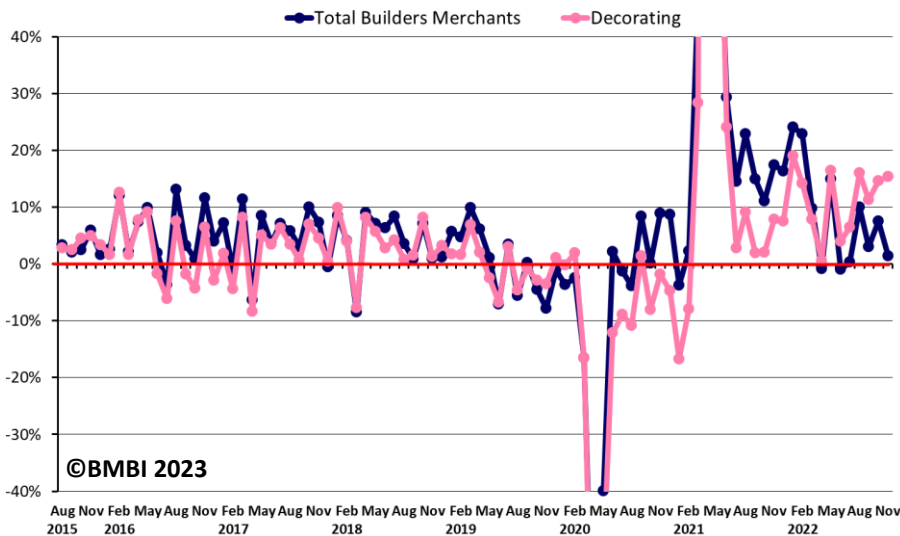
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Heavy Building Materials	-74.7%
	Total Builders Merchants	-76.5%
April 2021 peak:	Heavy Building Materials	+350.6%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

November 2022

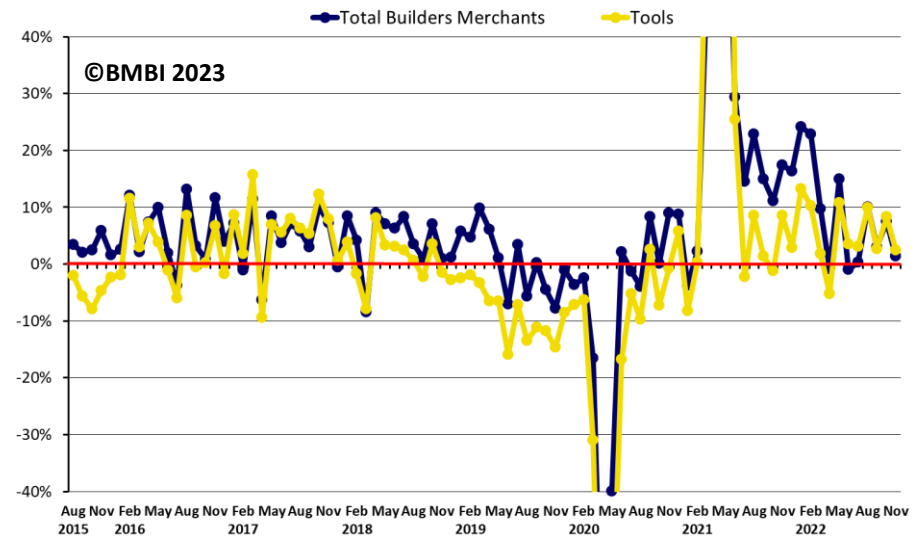
## Decorating - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Decorating	-81.6%
	Total Builders Merchants	-76.5%
April 2021 peak:	Decorating	+472.1%
	Total Builders Merchants	+419.2%

## Tools - Monthly



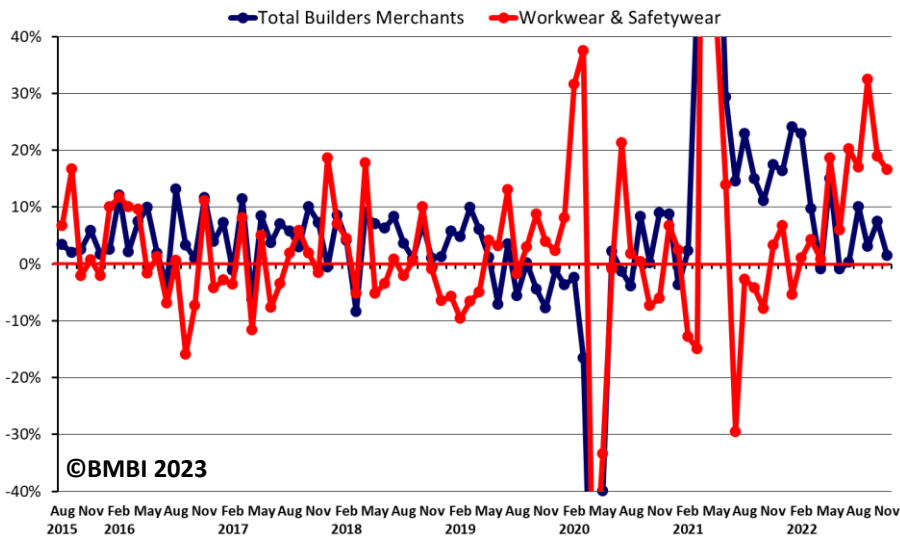
### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Tools	-90.0%
	Total Builders Merchants	-76.5%
April 2021 peak:	Tools	+1188.1%
	Total Builders Merchants	+419.2%

# Monthly Year-on-year

November 2022

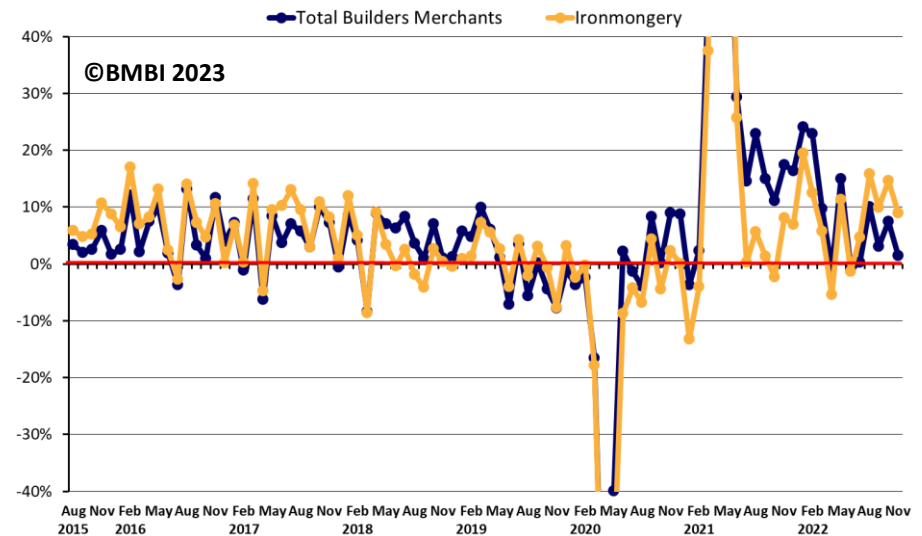
## Workwear & Safetywear - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Workwear & Safetywear	-60.2%
	Total Builders Merchants	-76.5%
April 2021 peak:	Workwear & Safetywear	+175.8%
	Total Builders Merchants	+419.2%

## Ironmongery - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Ironmongery	-77.8%
	Total Builders Merchants	-76.5%
April 2021 peak:	Ironmongery	+403.2%
	Total Builders Merchants	+419.2%

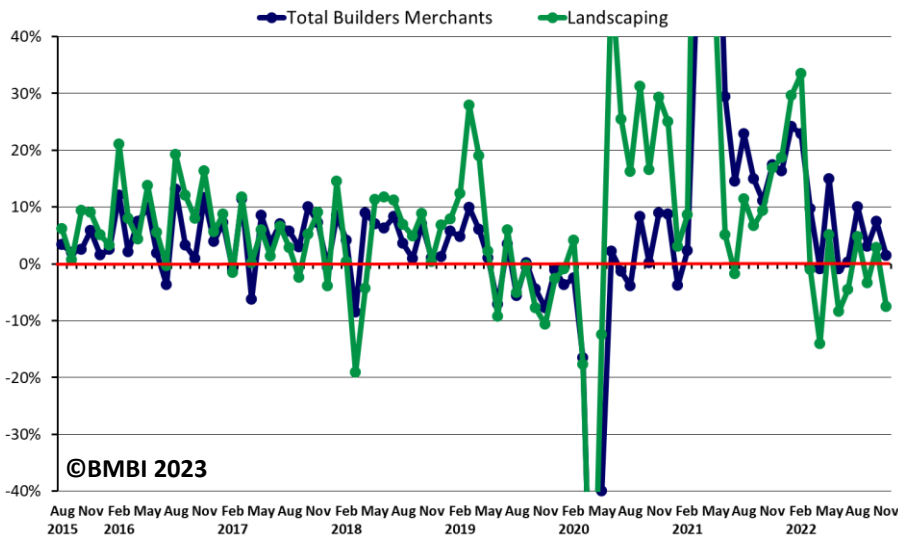


# Monthly Year-on-year

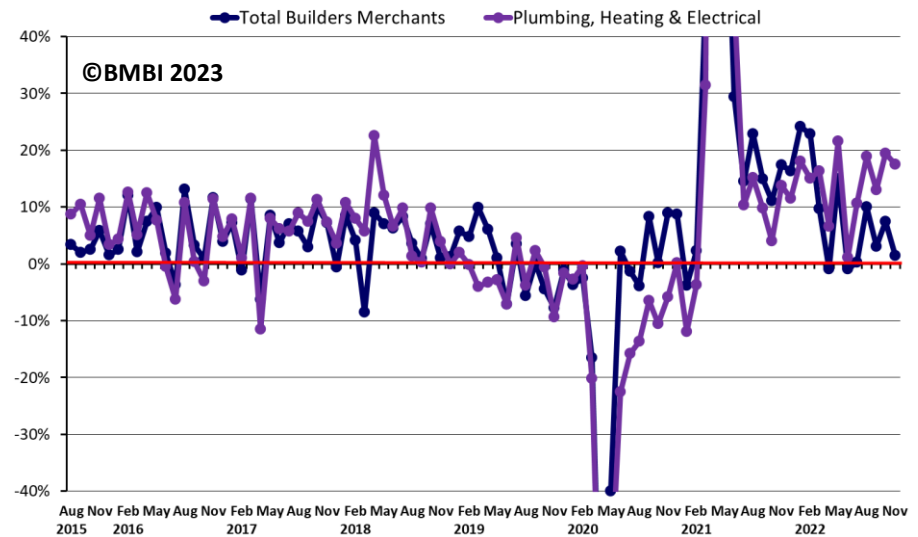
November 2022



## Landscaping - Monthly



## Plumbing Heating & Electrical - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Landscaping	-74.4%
	Total Builders Merchants	-76.5%
April 2021 peak:	Landscaping	+538.4%
	Total Builders Merchants	+419.2%

### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Plumbing Heating & Electrical	-77.9%
	Total Builders Merchants	-76.5%
April 2021 peak:	Plumbing Heating & Electrical	+369.9%
	Total Builders Merchants	+419.2%

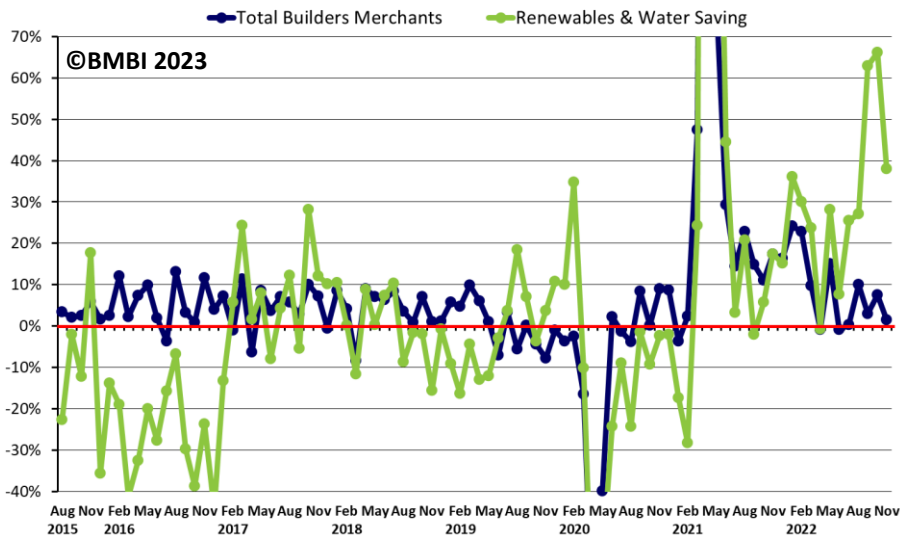
Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2022

# Monthly Year-on-year

November 2022



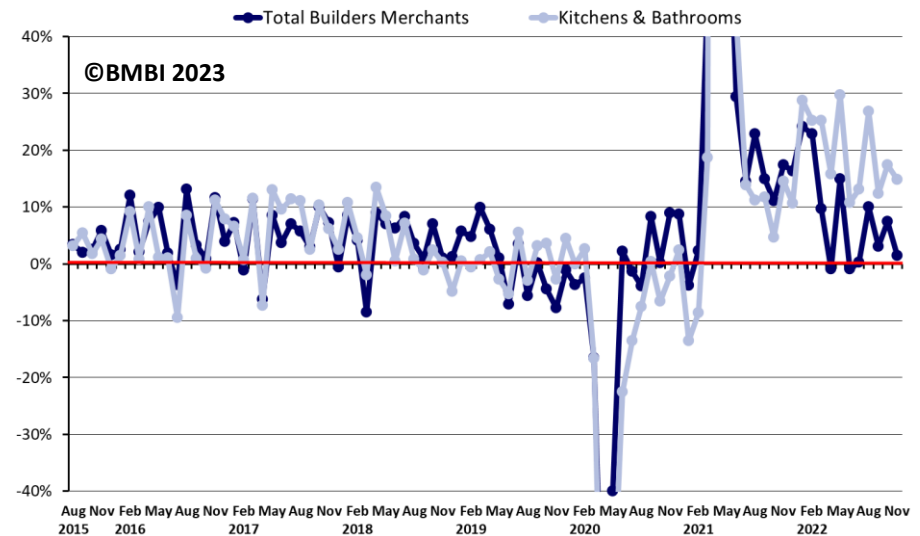
## Renewables & Water Saving - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Renewables & Water Saving	-77.4%
	Total Builders Merchants	-76.5%
April 2021 peak:	Renewables & Water Saving	+518.1%
	Total Builders Merchants	+419.2%

## Kitchens & Bathrooms - Monthly



### Covid19 peaks and troughs (off the chart)

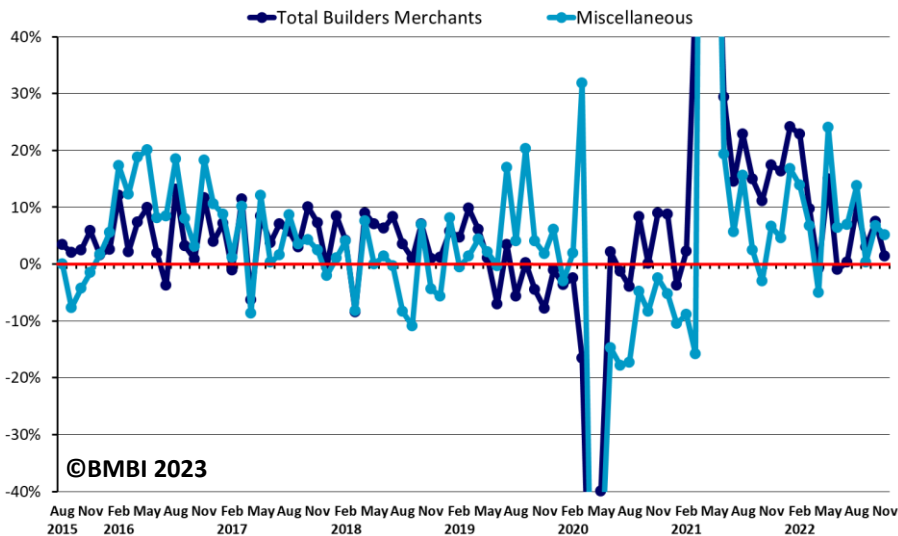
April 2020 trough:	Kitchens & Bathrooms	-86.8%
	Total Builders Merchants	-76.5%
April 2021 peak:	Kitchens & Bathrooms	+706.3%
	Total Builders Merchants	+419.2%

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2022

# Monthly Year-on-year

November 2022

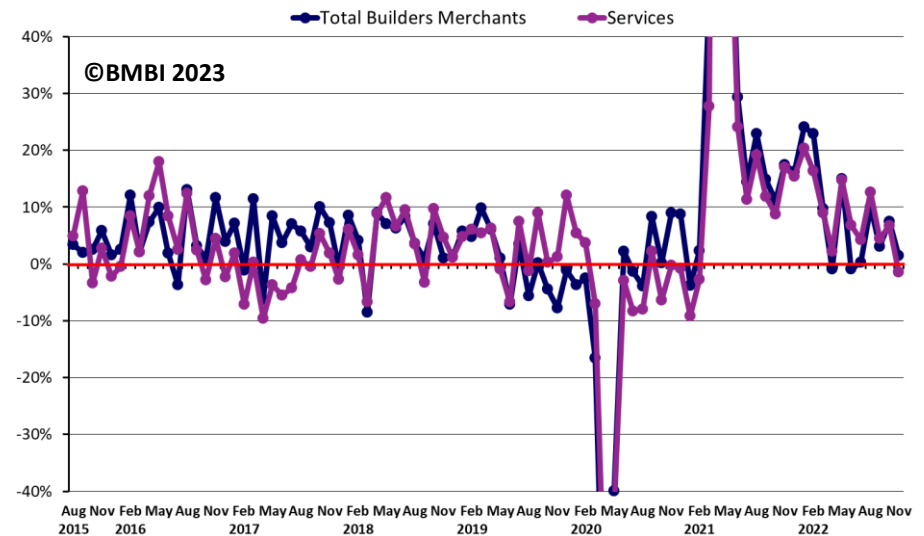
## Miscellaneous - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Miscellaneous	-67.7%
	Total Builders Merchants	-76.5%
April 2021 peak:	Miscellaneous	+243.5%
	Total Builders Merchants	+419.2%

## Services - Monthly



### Covid19 peaks and troughs (off the chart)

April 2020 trough:	Services	-62.9%
	Total Builders Merchants	-76.5%
April 2021 peak:	Services	+204.2%
	Total Builders Merchants	+419.2%

# Monthly: Index and Categories

November 2021\* – November 2022

(Indexed on monthly average, July 2014 – June 2015)



		2021		2022										
MONTHLY SALES VALUE INDEX	Index	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
<b>Total Builders Merchants</b>	<b>100</b>	<b>145.0</b>	<b>97.1</b>	<b>125.0</b>	<b>134.4</b>	<b>166.8</b>	<b>149.3</b>	<b>162.4</b>	<b>155.6</b>	<b>151.5</b>	<b>153.1</b>	<b>152.4</b>	<b>151.0</b>	<b>147.1</b>
Timber & Joinery Products	100	182.1	119.0	157.8	161.8	195.6	172.3	185.0	175.2	171.0	172.2	168.5	165.9	160.4
Heavy Building Materials	100	135.6	89.6	116.5	125.4	156.2	140.4	155.1	150.8	147.0	149.4	151.3	150.1	144.0
Decorating	100	118.5	81.7	102.2	109.3	131.2	114.0	124.2	122.0	122.1	126.2	127.8	130.6	137.4
Tools	100	109.8	73.2	95.7	101.9	124.2	104.6	109.9	103.7	100.3	102.7	102.9	108.2	111.3
Workwear & Safetywear	100	130.8	93.8	115.7	112.4	123.3	104.9	113.7	118.5	111.5	112.0	141.0	137.3	152.6
Ironmongery	100	132.8	94.2	123.2	125.5	151.5	130.1	141.3	135.2	135.3	139.2	141.9	142.6	144.7
Landscaping	100	143.7	92.6	116.2	149.5	220.0	220.8	231.7	215.1	195.5	183.5	166.1	152.6	132.7
Plumbing, Heating & Electrical	100	143.3	107.2	131.4	138.3	159.4	127.1	137.3	125.1	125.9	130.5	143.3	156.6	168.4
Renewables & Water Saving	100	82.9	58.3	85.1	80.9	106.8	78.6	93.3	86.3	90.4	89.9	115.3	118.1	113.8
Kitchens & Bathrooms	100	140.6	96.8	121.6	134.5	151.1	131.5	144.6	138.7	143.1	150.1	147.5	146.7	161.4
Miscellaneous	100	130.2	92.3	128.0	122.4	141.7	119.9	137.9	127.1	130.6	132.4	128.6	125.0	133.3
Services	100	135.1	102.7	112.5	120.1	146.6	131.7	141.8	140.5	138.4	146.6	139.4	136.3	133.2

\*Click the web link below to see the complete series of indices from July 2015.

Source: GfK's  
Builders Merchants  
Total Category Report  
July 2015 to November 2022

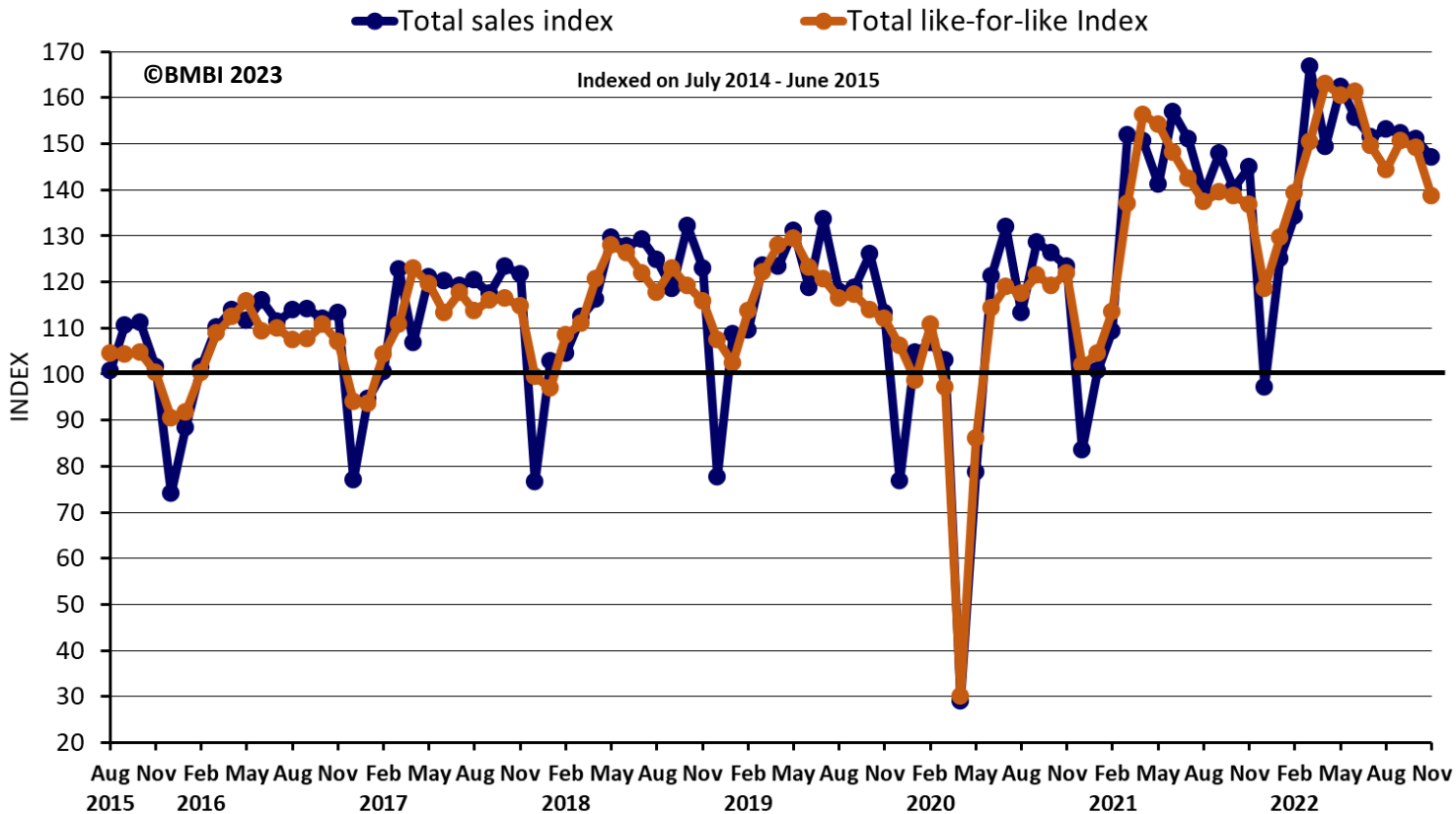
# Monthly: Index

## Sales and like-for-like sales

22 trading days this month v 21 trading days in the Index base period. Like-for-like sales take trading day differences into account.



### Total Builders Merchants sales v like-for-like sales index



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

November's Index (147.1) continued the softening seen in recent months, in line with seasonal norms.

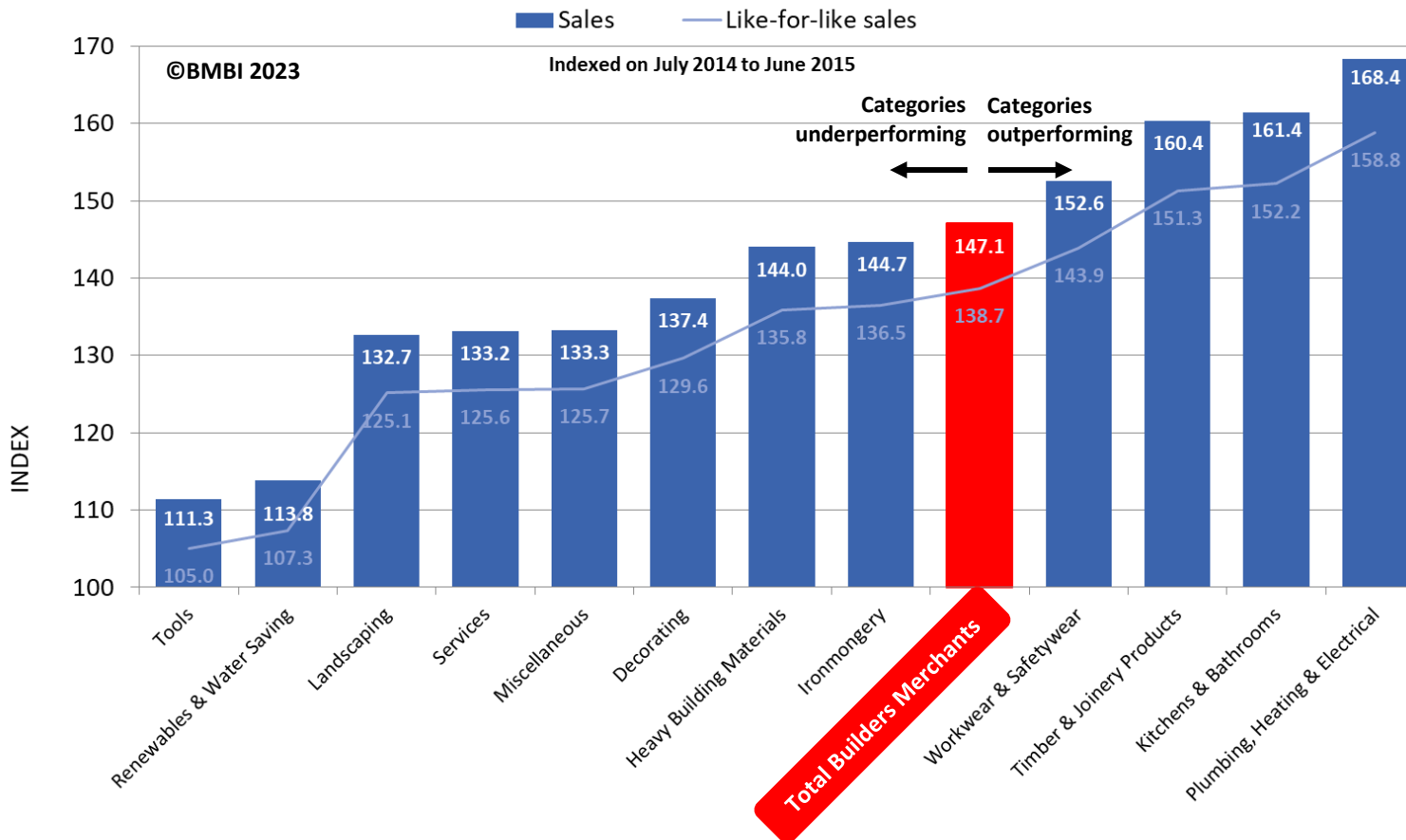
# Monthly: Index and Categories

## November 2022 index

22 trading days this month v 21 trading days in the Index base period. Like-for-like sales take trading day differences into account.



### November 2022 Index



Source: GfK's Builders Merchants Total Category Report July 2015 to November 2022

All twelve categories indexed above 100 in November with Plumbing, Heating & Electrical (168.4) doing best.

# Trading Days

## Monthly

Index: 20.8

2020											
Jan	Feb	Mar*	Apr*	May*	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	22	20	19	22	23	20	22	22	21	17
2021											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	20	19	22	22	21	22	21	22	17
2022											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
20	20	23	19	21	20	21	22	21	21	22	

## Quarterly

Index: 62.3

2020				2020		2020
Q1	Q2	Q3	Q4	H1	H2	250
64	61	65	60	125	125	
2021				2021		2021
Q1	Q2	Q3	Q4	H1	H2	249
63	61	65	60	124	125	
2022				2022		2022
Q1	Q2	Q3	Q4	H1	H2	
63	60	64		123		

\*Due to the Covid-19 pandemic, some merchants temporarily closed branches in the period March to May 2020, hence their trading days may have differed from the standard numbers shown above.

# GfK's Definition of Builders Merchant Panel



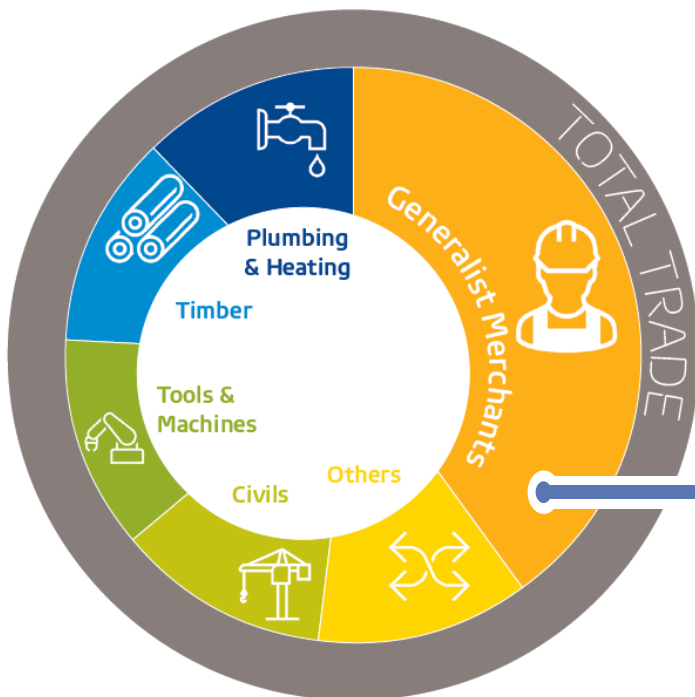
## Generalist Builders Merchants definition:

- 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 82%.

Examples include:

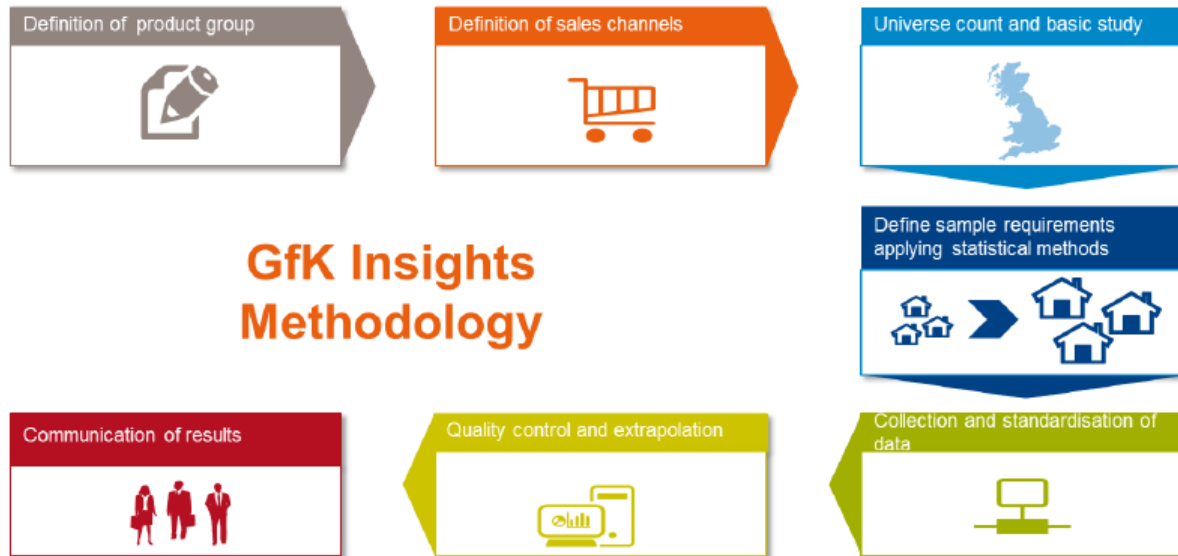


INDEPENDENT BUILDERS MERCHANT GROUP





# GfK Insights Methodology



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

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

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

# GfK's Product Categories

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



## Headline values available

### Timber & Joinery Products

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

### Heavy Building Materials

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

### Decorating

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

### Tools

Hand Tools  
Power Tools  
Power Tool Accessories  
Ladders & Access Equipment

### Workwear And Safetywear

Clothing  
Safety Equipment

### Ironmongery

Fixings And Fastenings  
Security  
Other Ironmongery

### Landscaping

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

### Plumbing Heating & Electrical

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

### Renewables And Water Management

Water Saving  
Renewables & Ventilation

### Kitchens & Bathrooms

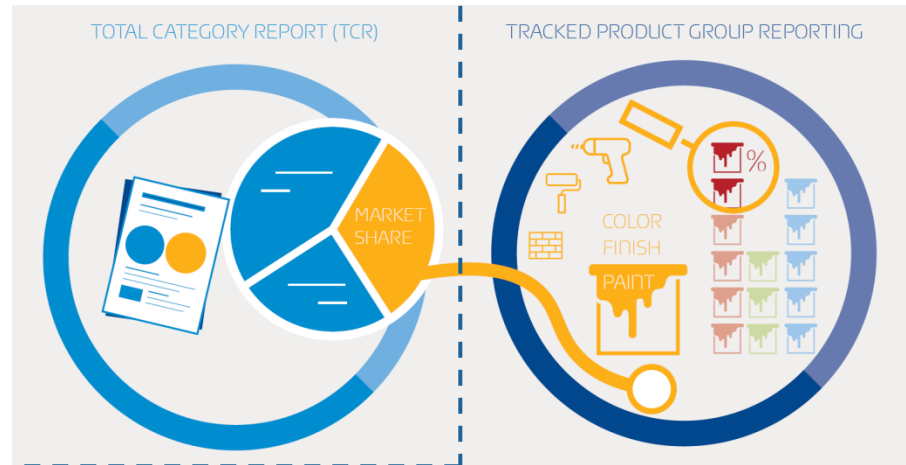
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### Miscellaneous

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

### Services

Toolhire / Hire Services  
Other Services



## In-depth product group reporting

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

For insights on your product group please contact Emile van der Ryst at GfK  
[emile.van-der-ryst@gfk.com](mailto:emile.van-der-ryst@gfk.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)

“building **excellence**  
in materials supply”



“building **excellence**  
in materials supply”

## BMF (Builders Merchant Federation) Forecast Report

# BMF Forecast Report

## Summer 2022 edition



### Builders Merchants Industry Forecast Report

The fourteenth edition of the BMF's Builders Merchants Industry Forecast, covering Summer 2022 onwards, is available now.

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 report is updated on a quarterly basis, with the Summer 2022 edition now available. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Thomas Lowe on 024 7685 4994 or email: [thomas.lowe@bmf.org.uk](mailto:thomas.lowe@bmf.org.uk)



# Building the Industry & Building Brands from Knowledge



# Contact us

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