

Excellence in building  
materials supply

# Builders Merchant Building Index



**Monthly report for February 2025**

(Published 28 April 2025)

# Highlights

Total value sales in December 2024 to February 2025 were -1.1% lower than the same period last year. Total volume sales were up (+1.8%) and prices were down -2.8%. Full comment on page [8](#).



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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 February 2025 [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 on pages 5 and 6 of this report or read their previous 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.

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

# The Expert Panel

## 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 Q4 2024 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: Q4 2024 Report](#)

### Expert for Natural Stone & Porcelain Paving:



**Krystal Williams**  
Managing Director  
Pavestone UK Ltd

[Read latest Comment: Q4 2024 Report](#)

### Expert for Fasteners and Fixings:



**Ian Doherty**  
Chief Executive  
Owlett-Jaton

[Read latest Comment: Q4 2024 Report](#)

### Expert for Roof Windows:



**Jim Blanthorne**  
Managing Director  
Keylite Roof Windows

[Read latest Comment: Q4 2024 Report](#)

### Expert for Steel Lintels:



**Derrick McFarland**  
Managing Director  
Keystone Lintels

[Read latest Comment: Q4 2024 Report](#)

### Expert for Mineral Wool Insulation:



**Neil Hargreaves**  
Managing Director  
Knauf Insulation

[Read latest Comment: Q4 2024 Report](#)

# The Expert Panel

## Speaking for their markets - 2



### Expert for Cement & Aggregates:



**Andrew Simpson**  
Packed Products Director  
Heidelberg Materials

[Read latest Comment: Q4 2024 Report](#)

### Expert for Paint:



**Paul Edworthy**  
Commercial Lead  
Dulux Trade

[Read latest Comment: Q4 2024 Report](#)

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



**Chris Fisher**  
Vice President of the EMEA lumber,  
building material and hardware  
(LBMH) division

[Read latest Comment: Q4 2024 Report](#)

### Expert for Plumbing & Drainage:



**Chris Dawson**  
Sales Director  
Brett Martin

[Read latest Comment: Q4 2024 Report](#)



### Expert for Heating & Cooling:



**Matt Williams**  
Managing Director  
Polypipe

[Read latest Comment: Q4 2024 Report](#)



# 88% coverage of the market



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

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

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

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

For any queries around this, please reach out to Emile van der Ryst at [emile.vanderryst@nielseniq.com](mailto:emile.vanderryst@nielseniq.com).

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



# Overview - 1



## February 2025 value sales were -2.7% down compared with February last year

Total Builders Merchants value sales were down -2.7% in February 2025 compared with the same month last year. Services (+3.0%), Tools (+2.6%) and Miscellaneous (+2.3%) were the only categories to sell more. Categories performing better than Total Merchants, although still down, include Plumbing Heating & Electrical (-1.3%) and Heavy Building Materials (-1.6%). Decorating (-6.4%) and Renewables & Water Saving (-6.6%) were weakest. With one less trading day, like-for-like value sales (which take trading day differences into account) were up +2.2%. Total Builders Merchants' volume sales were flat (-0.1%) and prices were down -2.6%.

### February 2025 v January 2025

Total Merchants value sales were +4.4% higher in February 2025 than in January 2025. Nine of the twelve categories sold more. Three of the twelve categories performed better than Total Builders Merchants: Landscaping (+15.1%), Services (+6.1%) and Heavy Building Materials (+5.4%). Workwear & Safetywear was the weakest at -8.3%. With two less trading days this month, like-for-like value sales were up +14.8%. Total Merchants' volume sales were +8.0% up and prices were down -3.4%.

### February Index:

February's overall BMBI index was 104.6. Ten of the twelve categories exceeded 100. Workwear & Safetywear (133.3) indexed the most, followed by Renewables & Water Saving (118.9), Plumbing Heating & Electrical (118.4) and Kitchens & Bathrooms (112.8). Ironmongery (101.1), Timber & Joinery Products (97.5), and seasonal category Landscaping (95.3) indexed less than Total Builders Merchants. With one less trading day this month versus the Index base period, the like-for-like value sales index was 108.1.

### Latest three months v last year: December 2024 - February 2025 v December 2023 - February 2024

Total value sales in December 2024 to February 2025 were -1.1% lower than the same period last year. Four of the twelve categories sold more, with Services (+4.9%) and Tools (+4.1%) up the most. Renewables & Water Saving (-7.0%) was the weakest performing category. There was no difference in trading days. Total volume sales were up +1.8% and prices were down -2.8%.

Total value sales in December 2024 to February 2025 were -1.1% lower than the same period last year.

Total volume sales were up +1.8% and prices were down -2.8%.

Overview continues on the next page...



# Overview - 2



... continued from the previous page:

## **Latest three months v previous three months: December 2024 - February 2025 v September 2024 - November 2024**

Total value sales in December 2024 to February 2025 were -19.9% lower than in September to November 2024. All categories sold less. Nine categories performed better than Total Builders Merchants with Miscellaneous (-7.5%), Plumbing Heating & Electrical (-10.6%), Ironmongery (-14.4%) and Services (-14.6%) falling less than other categories. Seasonal category Landscaping (-25.7%) was weakest. With six less trading days this period, like-for-like value sales were -11.7% lower. Total volume sales were down -21.9% with prices up +2.6%.

## **Year-to-date: January 2025 to February 2025 v January 2024 to February 2024**

Total value sales in January 2025 to February 2025 were -2.5% lower than January 2024 to February 2024. Six categories performed better than Total Builders Merchants: Services (+3.3%), Tools (+2.5%), Miscellaneous (+1.1%), Heavy Building Materials (-1.4%), Plumbing Heating & Electrical (-2.1%) and Ironmongery (-2.4%). Decorating (-6.4%) was weakest. With one less trading day this period, like-for-like value sales were down -0.2%. Total volume sales were flat and prices down -2.4%.

## **Latest 12 months v last year: March 2024 - February 2025 v March 2023 - February 2024**

Total value sales in the last 12 months, March 2024 to February 2025, were -4.0% down on the previous period, March 2023 to February 2024. Four of the twelve categories sold more with Workwear & Safetywear (+6.8%) up the most, followed by Tools (+6.6%), Services (+3.2%) and Miscellaneous (+0.2%). The two largest categories Timber & Joinery Products (-6.2%) and Heavy Building Materials (-4.8%) declined more than Total Merchants. Renewables & Water Saving (-21.2%) was weakest. There was no difference in trading days. Total volume sales were -3.5% down with prices down (-0.4%).

Total value sales in the last 12 months, March 2024 to February 2025, were -4.0% down on the previous period, March 2023 to February 2024.

Total volume sales were -3.5% down with prices slightly down (-0.4%).

# Latest month v last year

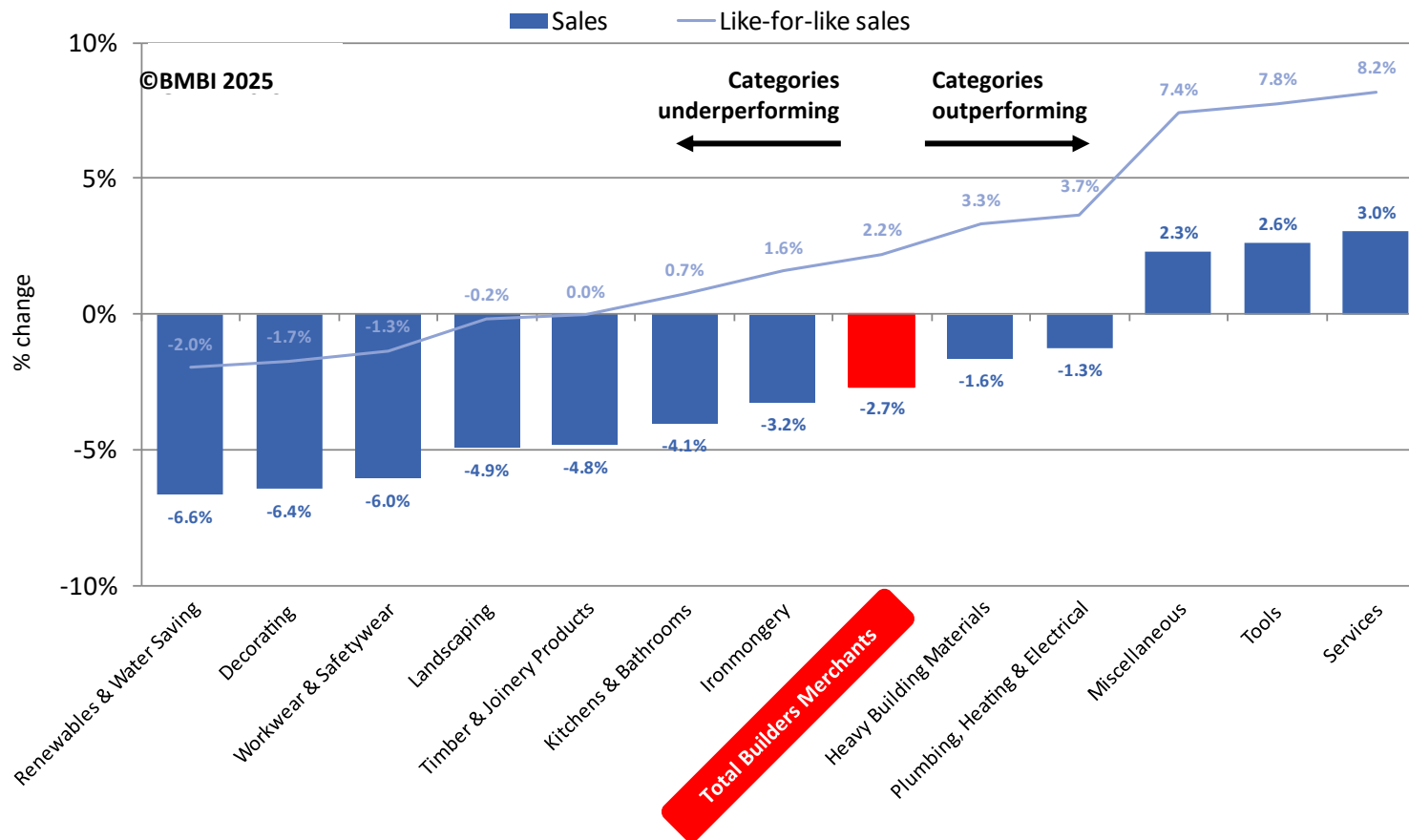
## Value sales and like-for-like value sales % change

20 trading days this year v 21 trading days last year.

Like-for-like sales take trading day differences into account.



### February 2025 v February 2024



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Total Builders Merchants value sales were down -2.7% in February 2025 compared with the same month last year.

Total Builders Merchants' volume sales were flat (-0.1%) and prices were down -2.6%.

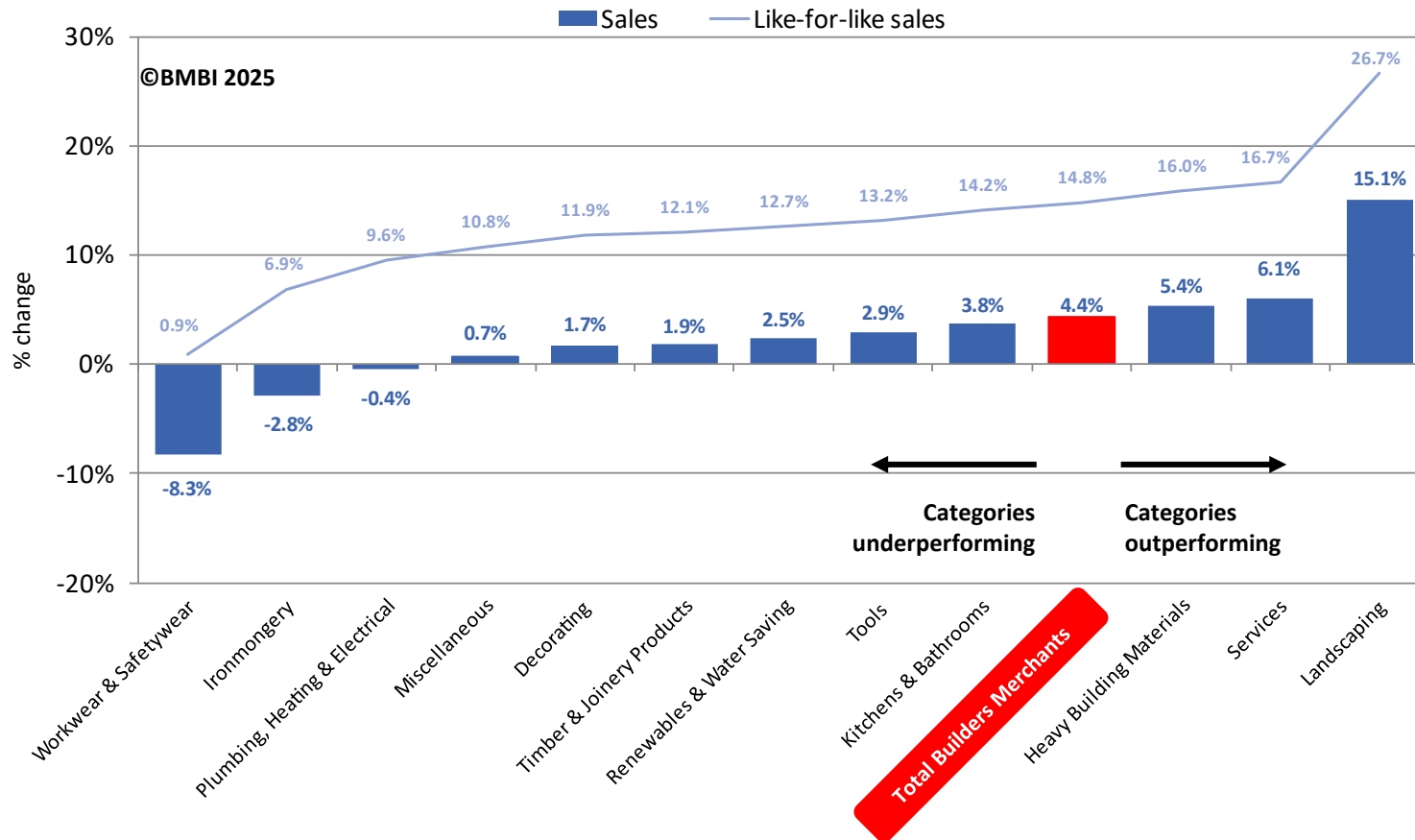
# Latest month v previous month

## Value sales and like-for-like value sales % change

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



### February 2025 v January 2025



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Total Merchants  
value sales were  
+4.4% higher in  
February 2025 than  
in January 2025.

Total Merchants'  
volume sales were  
+8.0% up and prices  
were down -3.4%.

# Latest 3 months v last year

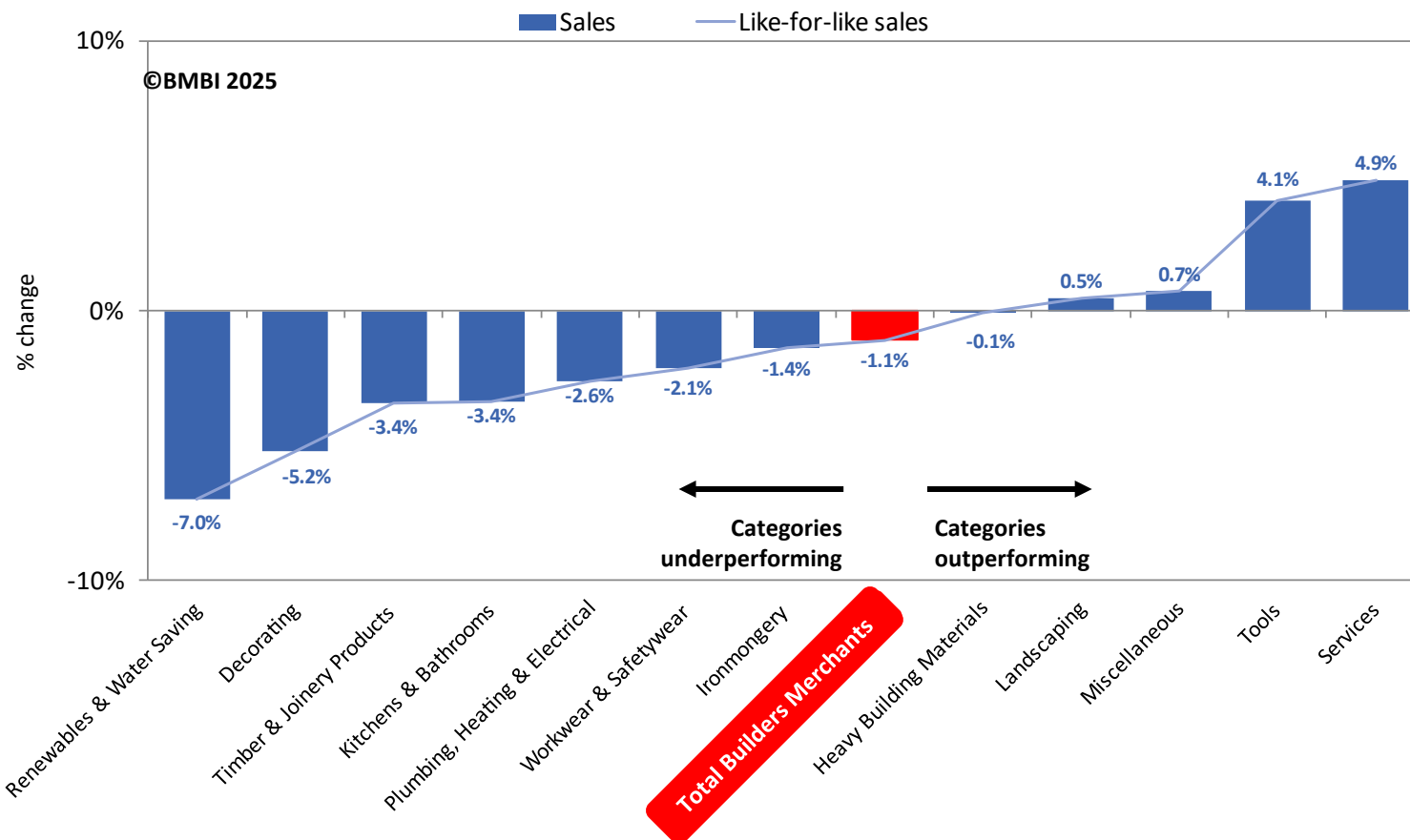
## Value sales and like-for-like value sales % change

There was no difference in trading days (59).

Like-for-like sales take trading day differences into account.



### 3 months Dec 24 to Feb 25 v 3 months Dec 23 to Feb 24



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Total value sales in December 2024 to February 2025 were -1.1% lower than the same period last year.

Total volume sales were up +1.8% and prices were down -2.8%.

# Latest 3 months v previous 3 months

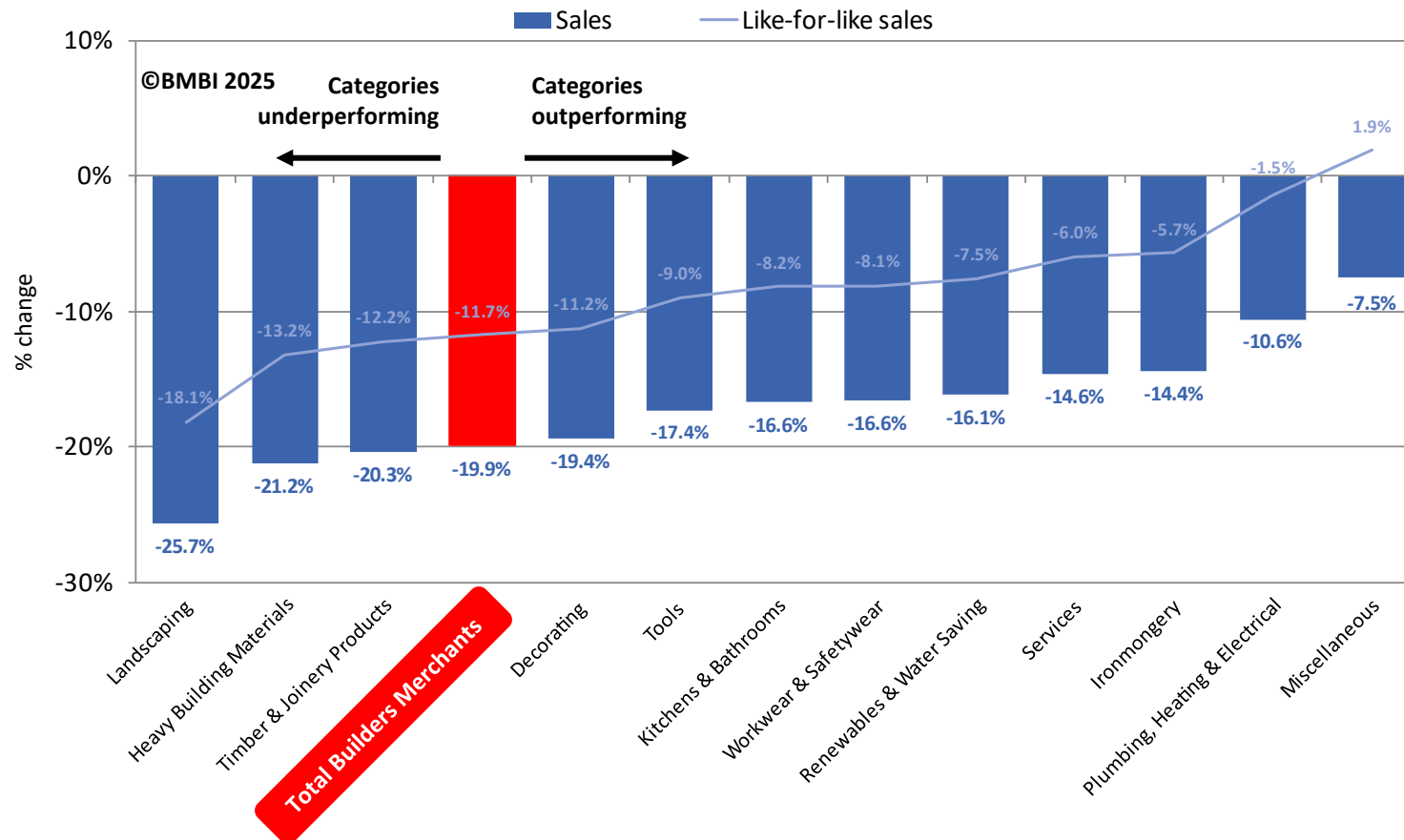
## Value sales and like-for-like value sales % change

59 trading days this recent period v 65 trading days in the previous period.

Like-for-like sales take trading day differences into account.



### 3 months Dec 24 to Feb 25 v 3 months Sep 24 to Nov 24



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Total value sales in December 2024 to February 2025 were -19.9% lower than in September to November 2024.

Total volume sales were down -21.9% with prices up +2.6%.

# Year-to-date v last year

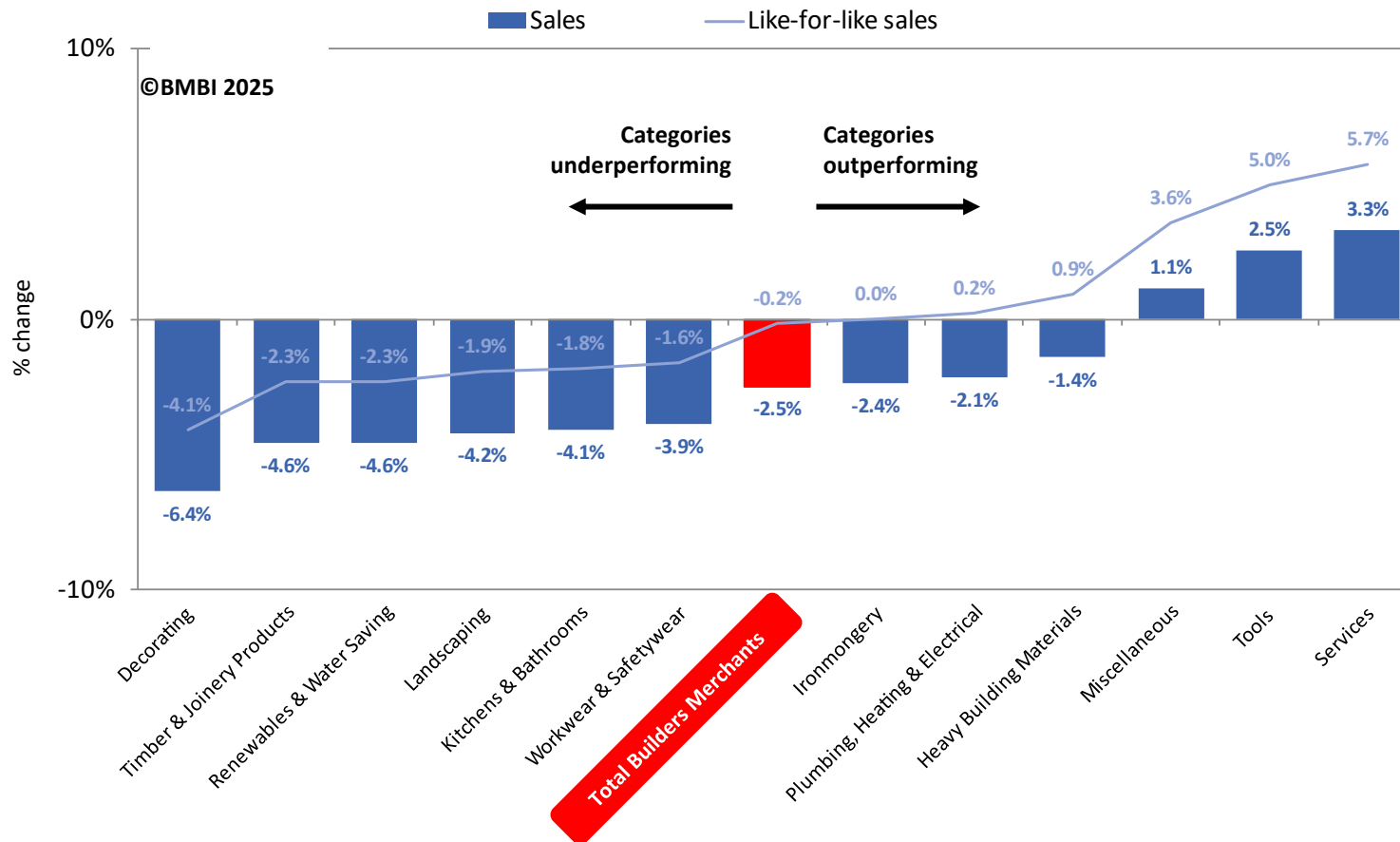
## Value sales and like-for-like value sales % change

42 trading days this year v 43 trading days last year.

Like-for-like sales take trading day differences into account.



### Year to date: Jan 25 to Feb 25 v Jan 24 v Feb 24



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Total value sales in January 2025 to February 2025 were -2.5% lower than January 2024 to February 2024.

Total volume sales were flat and prices down -2.4%.

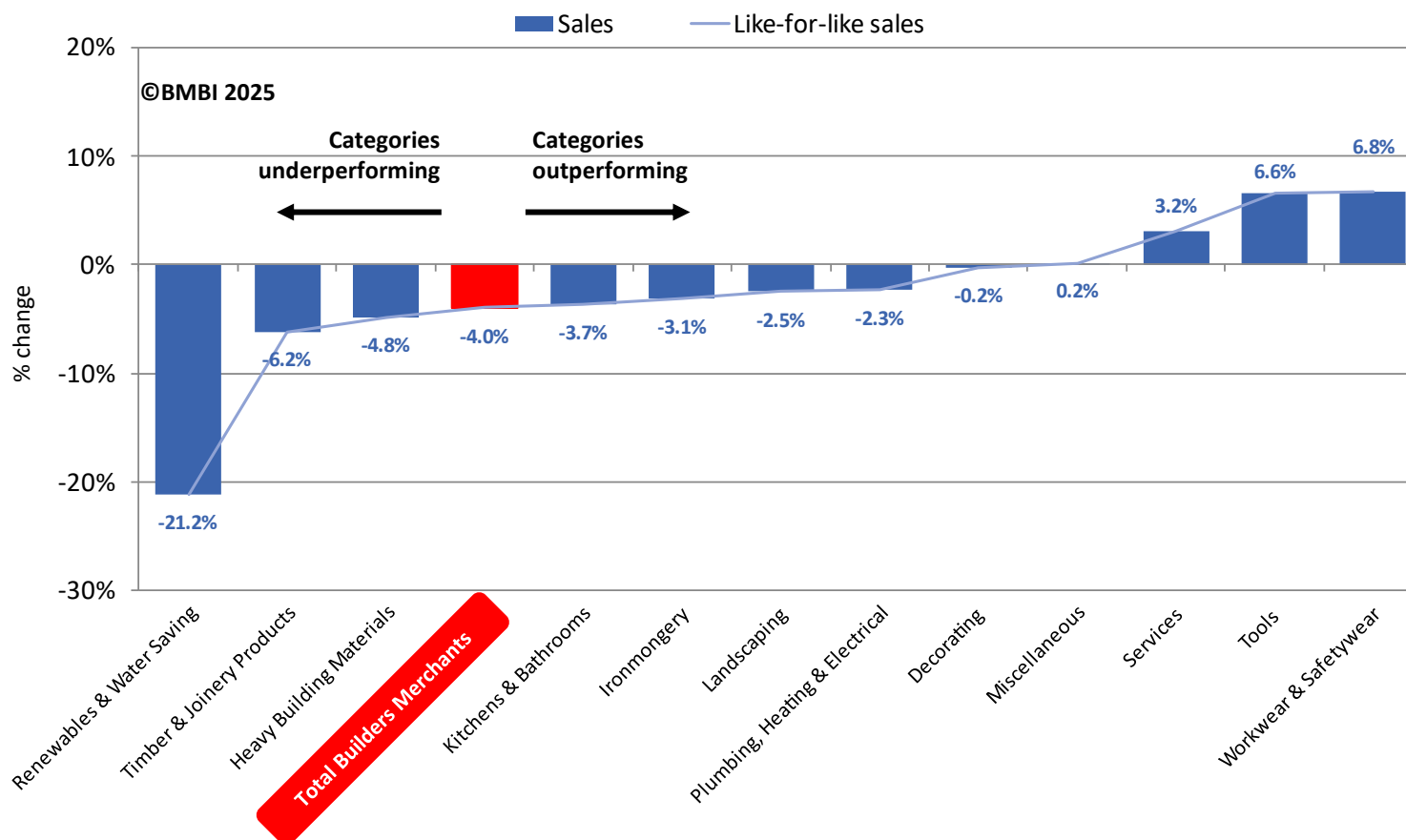
# Latest 12 months v last year

## Value sales and like-for-like value sales % change

There was no difference in trading days (250).  
Like-for-like sales take trading day differences into account.



### 12 months Mar 24 to Feb 25 v 12 months Mar 23 to Feb 24



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Total value sales in the last 12 months, March 2024 to February 2025, were -4.0% down on the previous period, March 2023 to February 2024.

Total volume sales were -3.5% down with prices slightly down (-0.4%).



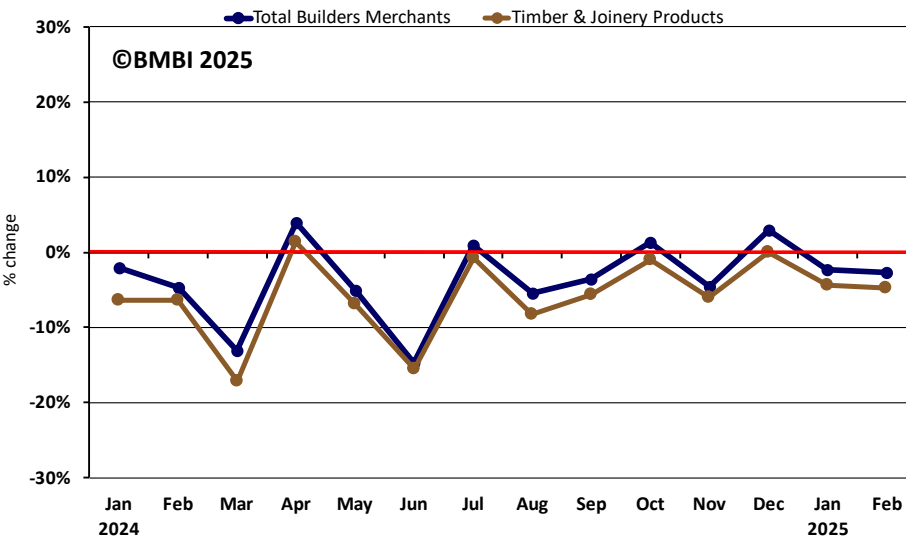
# Monthly Year-on-year

Value sales % change

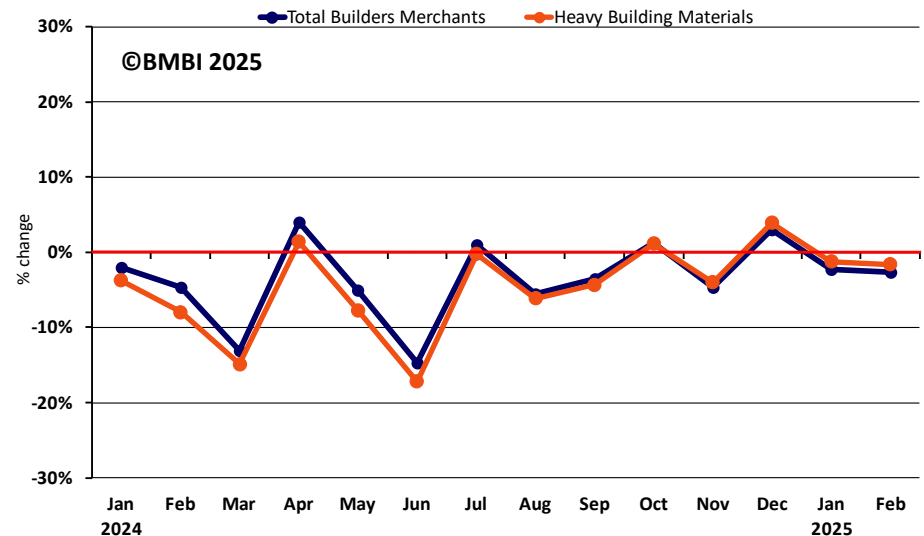
February 2025



## Timber & Joinery Products - Monthly



## Heavy Building Materials - Monthly



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

# Monthly Year-on-year

Value sales % change

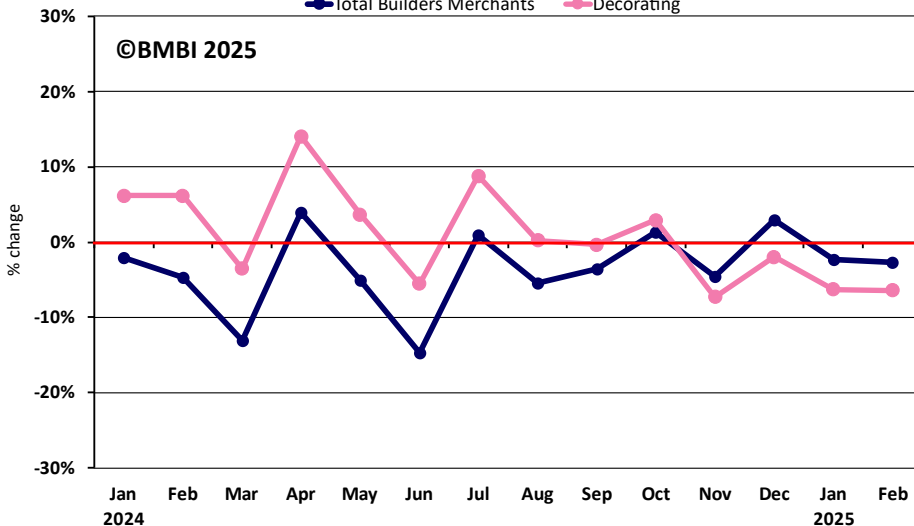
February 2025



## Decorating - Monthly

● Total Builders Merchants ● Decorating

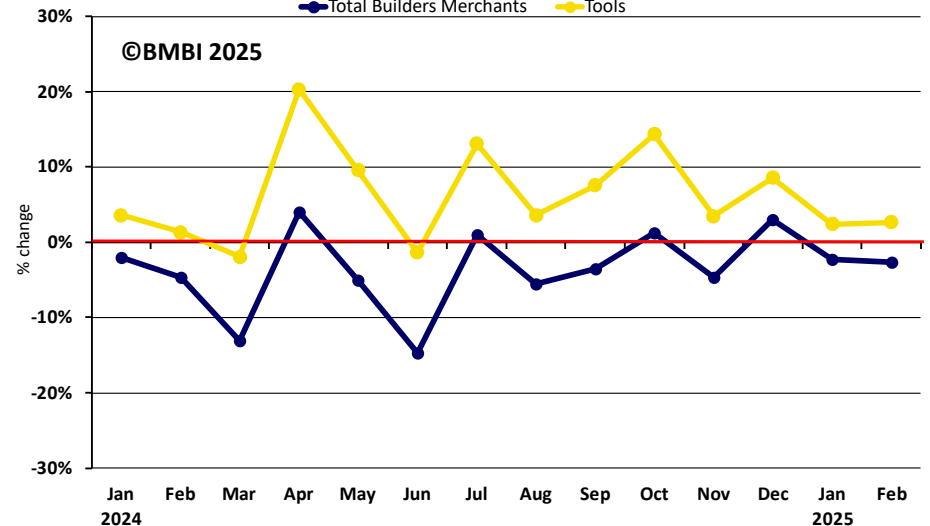
©BMBI 2025



## Tools - Monthly

● Total Builders Merchants ● Tools

©BMBI 2025



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

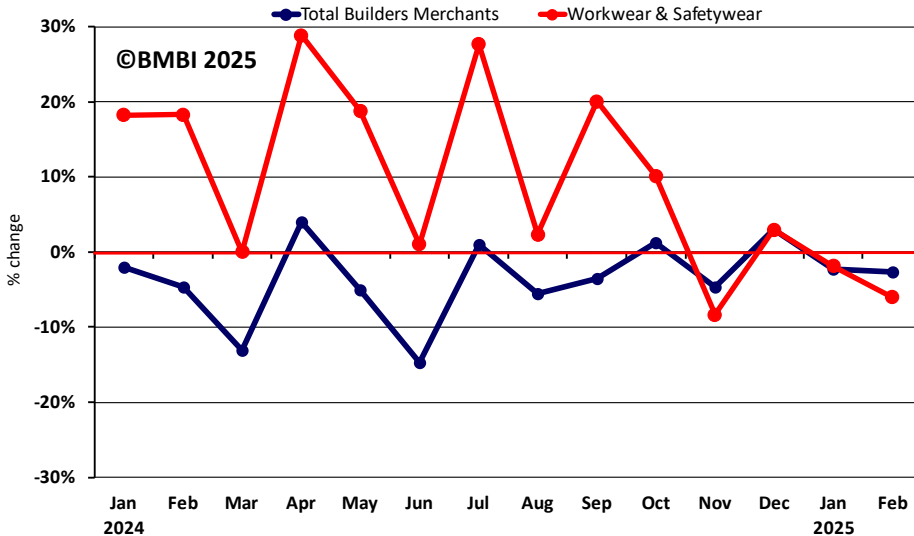
# Monthly Year-on-year

Value sales % change

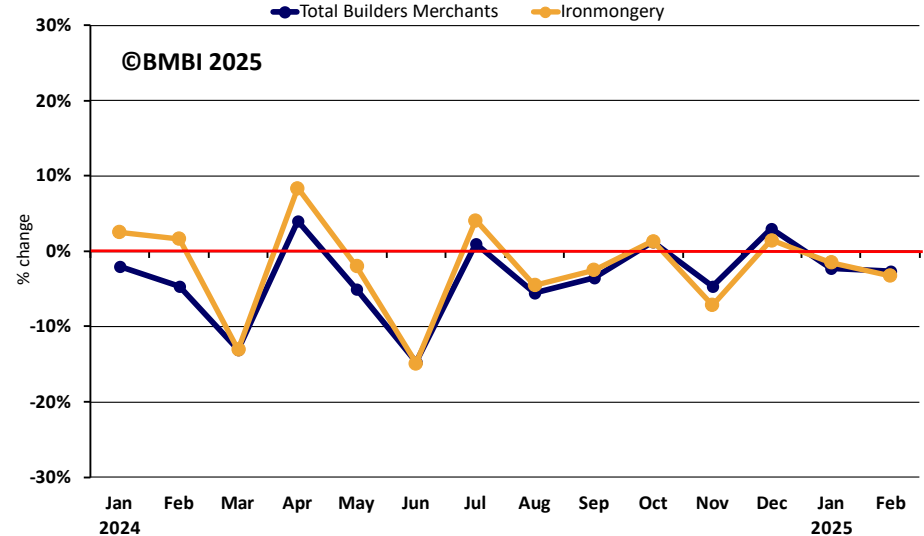
February 2025



## Workwear & Safetywear - Monthly



## Ironmongery - Monthly



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

# Monthly Year-on-year

Value sales % change

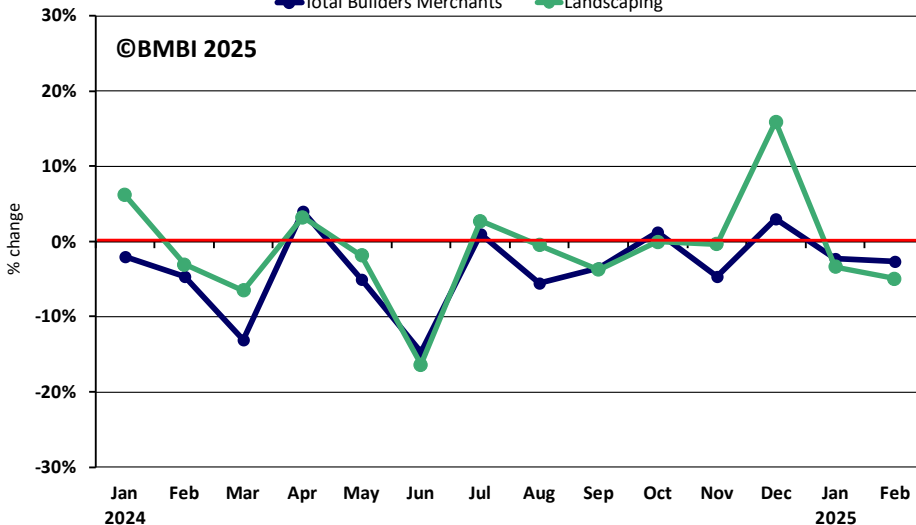
February 2025



## Landscaping - Monthly

● Total Builders Merchants ● Landscaping

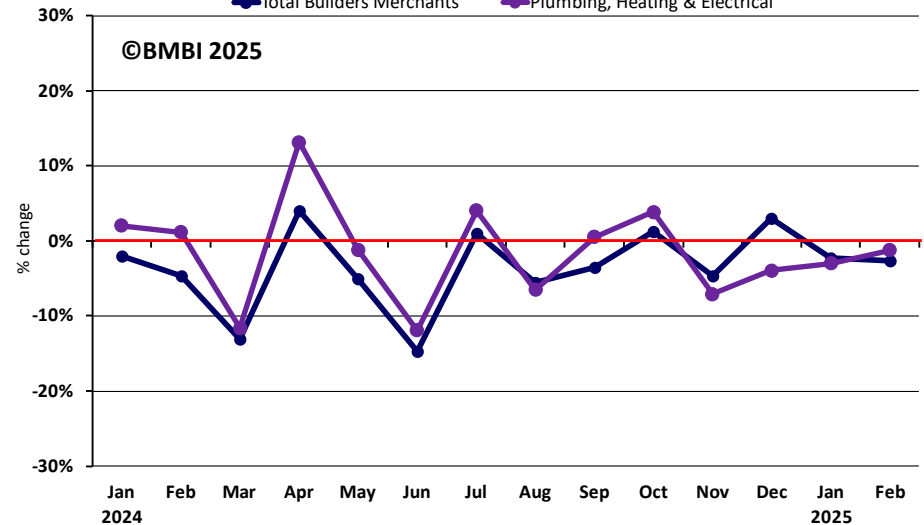
©BMBI 2025



## Plumbing Heating & Electrical - Monthly

● Total Builders Merchants ● Plumbing, Heating & Electrical

©BMBI 2025



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

# Monthly Year-on-year

Value sales % change

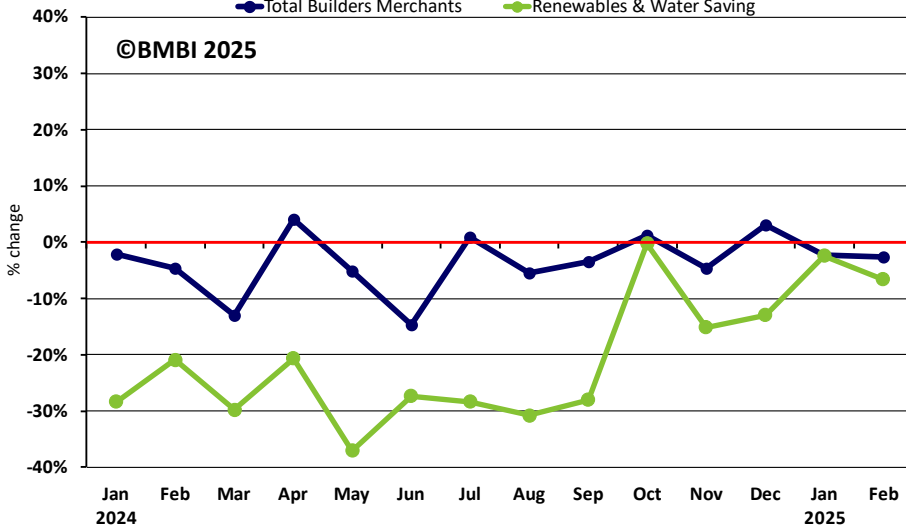
February 2025



## Renewables & Water Saving - Monthly

◆ Total Builders Merchants ◆ Renewables & Water Saving

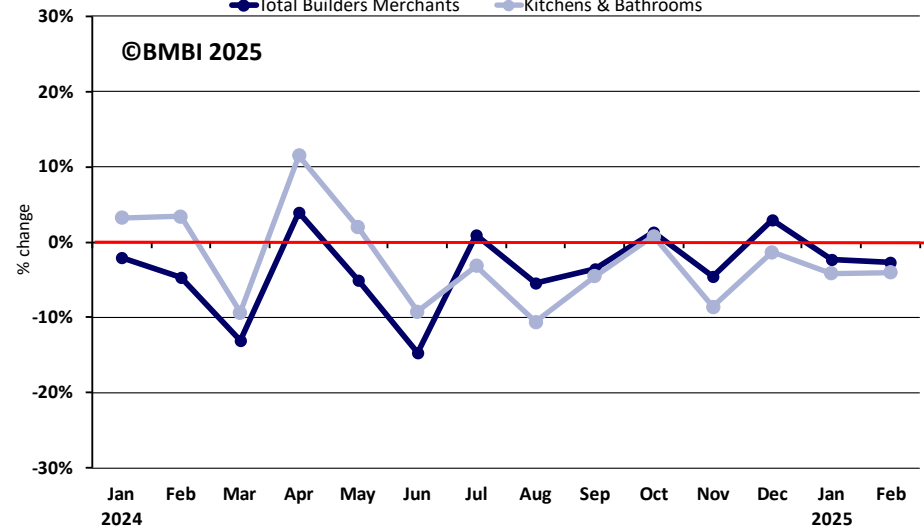
©BMBI 2025



## Kitchens & Bathrooms - Monthly

◆ Total Builders Merchants ◆ Kitchens & Bathrooms

©BMBI 2025



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

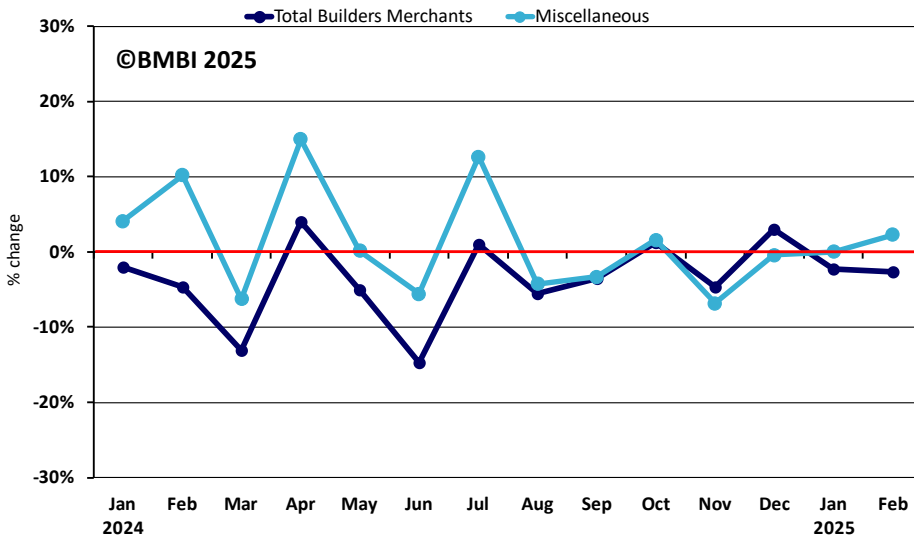
# Monthly Year-on-year

Value sales % change

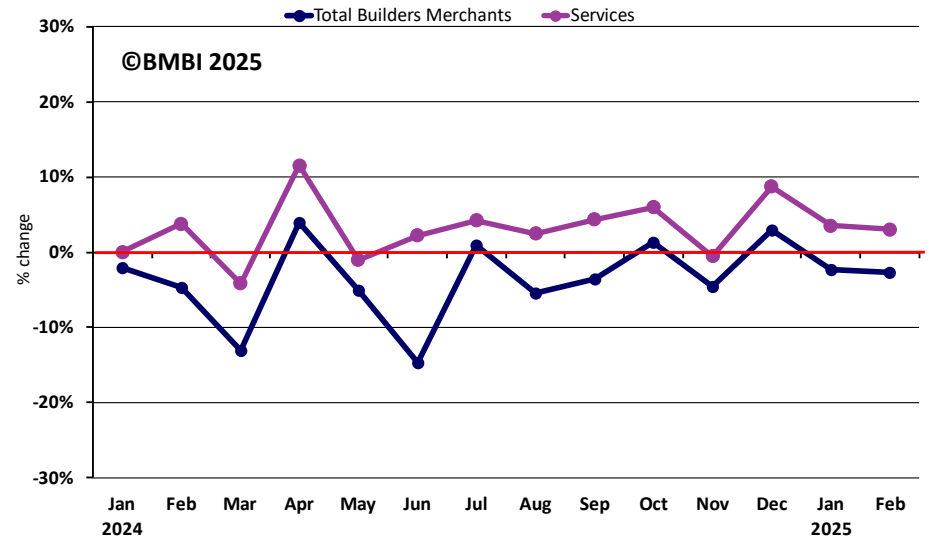
February 2025



## Miscellaneous - Monthly



## Services - Monthly



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

# Monthly: Index by Categories

February 2024\* - February 2025

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



		2024											2025	
MONTHLY SALES VALUE INDEX	Index	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb
Total Builders Merchants	100	107.4	112.1	117.7	121.2	113.9	127.1	116.8	114.9	123.2	110.9	74.8	100.2	104.6
Timber & Joinery Products	100	102.4	105.3	109.1	110.9	104.6	117.7	109.0	108.4	116.4	105.0	69.6	95.6	97.5
Heavy Building Materials	100	108.0	112.6	118.0	122.4	115.5	130.2	119.5	117.6	126.3	113.2	74.4	100.8	106.3
Decorating	100	116.8	119.5	122.9	124.2	119.3	132.8	122.9	120.8	131.5	118.4	82.0	107.4	109.3
Tools	100	107.0	115.6	118.7	116.5	110.2	121.2	111.2	113.8	128.9	116.5	80.4	106.6	109.8
Workwear & Safetywear	100	141.9	138.2	131.8	135.5	118.4	141.8	121.0	148.3	162.2	149.7	105.2	145.4	133.3
Ironmongery	100	104.4	102.8	108.2	108.2	101.3	116.7	106.7	106.4	116.2	104.4	75.0	103.9	101.0
Landscaping	100	100.2	120.8	139.5	157.1	143.2	148.0	134.3	116.9	113.5	97.1	65.3	82.8	95.3
Plumbing, Heating & Electrical	100	119.9	115.5	113.8	107.2	98.9	114.3	102.8	112.7	130.0	120.9	87.9	118.8	118.4
Renewables & Water Saving	100	127.4	121.5	130.8	106.8	112.6	128.0	113.5	111.5	148.6	123.2	86.7	116.1	118.9
Kitchens & Bathrooms	100	117.6	116.1	119.1	118.5	112.1	121.1	110.8	117.5	124.4	121.2	81.1	108.7	112.8
Miscellaneous	100	104.0	100.7	101.4	101.5	96.3	112.4	99.7	96.6	112.0	102.8	76.0	105.6	106.3
Services	100	105.1	112.4	119.6	118.9	112.6	127.6	122.0	113.9	125.4	112.6	90.0	102.1	108.3

\*Click the web link below to see the complete series of indices from February 2023.



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025



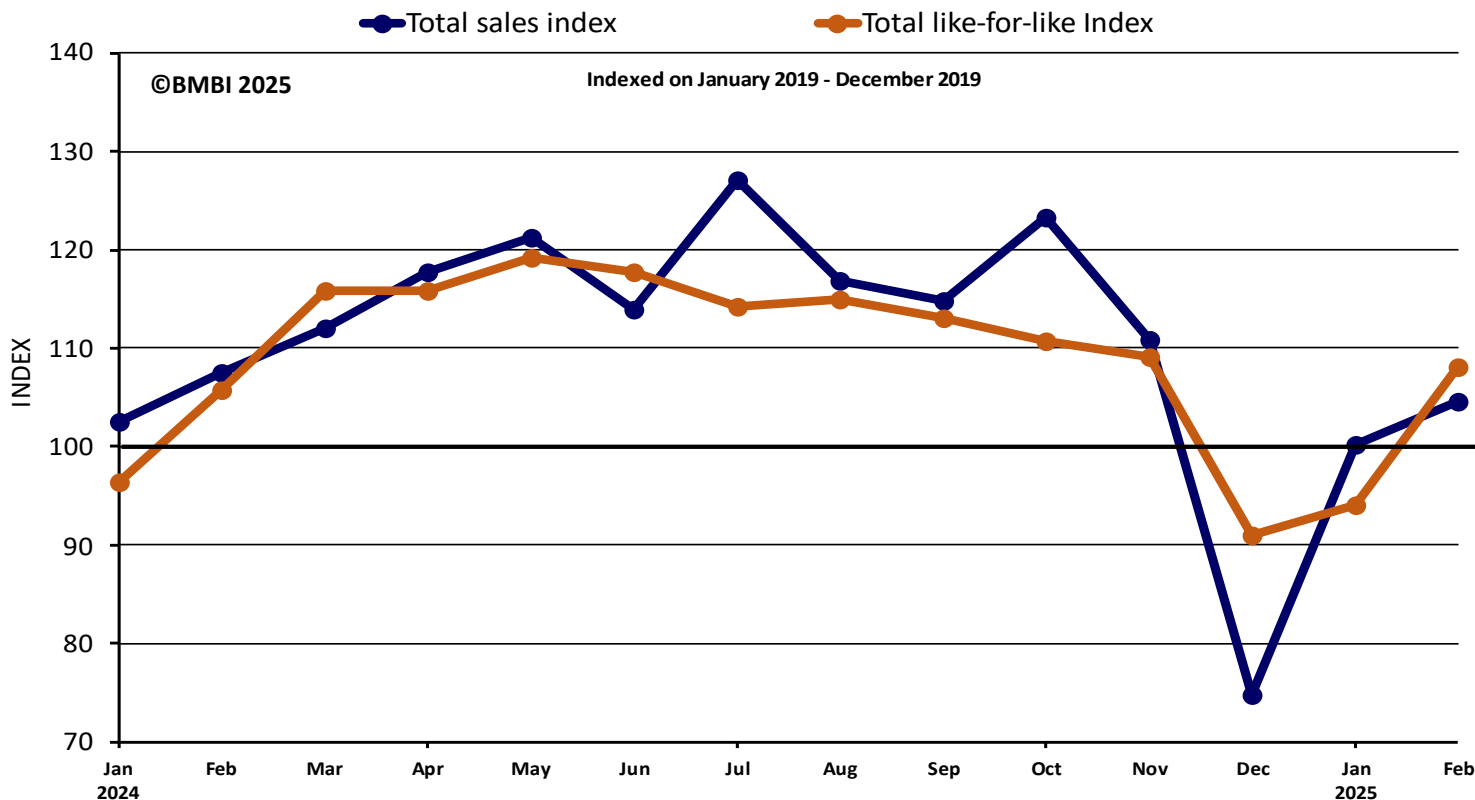
# Monthly: Index

## Value sales and like-for-like value sales index

There were 20 trading days in February 2025 vs the Index base period (21).  
Like-for-like sales take trading day differences into account.



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



NIQ GfK

Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

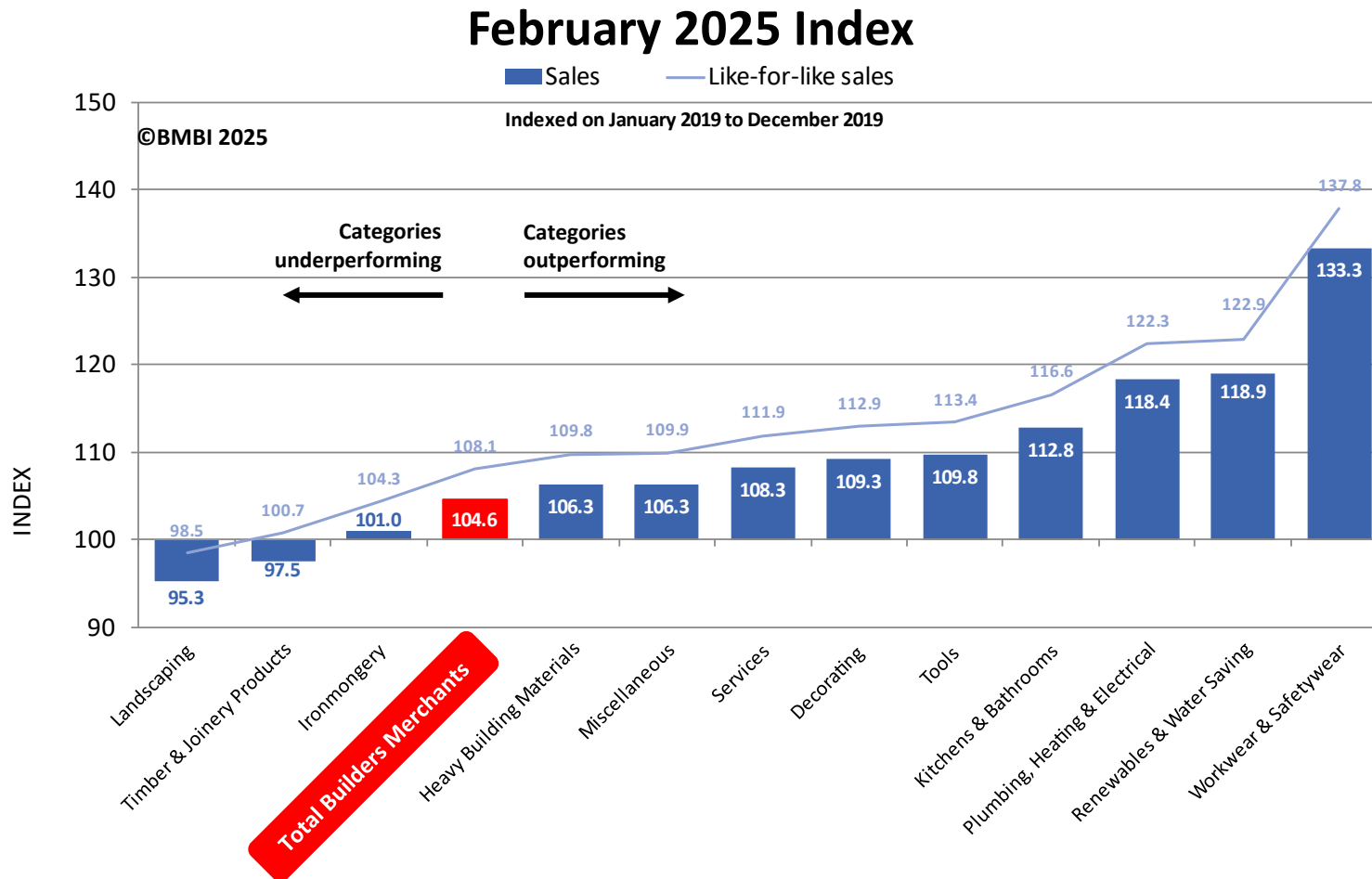
February's overall  
BMBI index  
was 104.6.

With one more  
trading day this  
month versus the  
Index base period,  
the like-for-like value  
sales index  
was 108.1.

# Latest month: Index by Categories

## Value sales and like-for-like value sales index

There were 20 trading days in February 2025 vs the Index base period (21).  
Like-for-like sales take trading day differences into account.



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

Workwear & Safetywear (133.3) indexed the most, followed by Renewables & Water Saving (118.9), Plumbing Heating & Electrical (118.4) and Kitchens & Bathrooms (112.8).

# Trading Days



## Monthly

Index: 20.7

2023											
Jan 21	Feb 20	Mar 23	Apr 18	May 20	Jun 22	Jul 21	Aug 22	Sep 21	Oct 22	Nov 22	Dec 16
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	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

## Quarterly

Index: 62

2023			
Q1 64	Q2 60	Q3 64	Q4 60
2024			
Q1 63	Q2 62	Q3 65	Q4 61
2025			
Q1	Q2	Q3	Q4

## Half Year

2023	
H1 124	H2 124
2024	
H1 125	H2 126
2025	
H1	H2

## Full Year

2023
248
2024
251
2025



Source: GfK's Builders Merchants  
Total Category Report: January  
2019 to February 2025

# GfK's Definition of Builders Merchant Panel



## Generalist Builders Merchants definition:

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

## Examples include:



INDEPENDENT BUILDERS  
MERCHANT GROUP





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

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

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

# 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

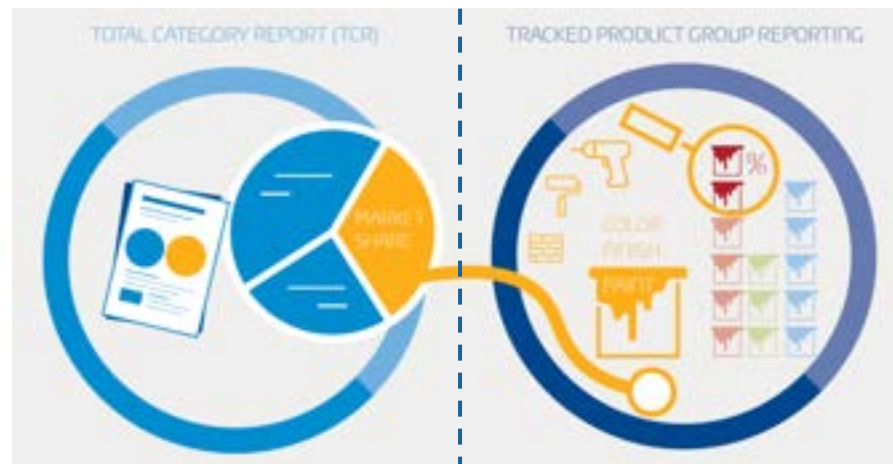
Bathroom (Including Showering)  
Fitted Kitchens  
Major Appliances

### 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 GfK

[emile.vanderryst@nielseniq.com](mailto:emile.vanderryst@nielseniq.com)

### Available categories:

#### Heavyside

Bricks  
Insulation

#### Lightside

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

# Excellence in building materials supply



## BMF (Builders Merchant Federation) Forecast Report



# BMF Forecast Report

## Winter 2024 Edition



### Builders Merchants Industry Forecast Report

The latest forecast report of the BMF's Builders Merchants Industry Forecast, covering Winter 2024 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.

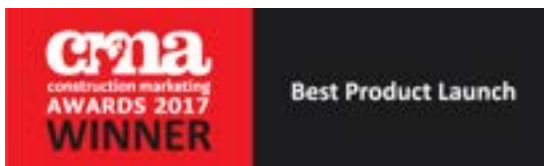
Using BMBI data coupled with advanced modelling techniques the BMF has developed a channel-specific forecasting model to show what is likely to happen in the next 12 months, making it possible for merchants and suppliers to forecast their customers' requirements more accurately.

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 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

For further information



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