

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**May 2021**

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A Builders Merchant Building Index Publication

# Building the Industry & Building Brands from Knowledge



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# Introduction:

## Plumbing & Heating Merchant Index



This Plumbing & Heating Merchant Index (PHMI) report contains data from GfK's ground-breaking Plumbing & Heating Merchants Panel, which analyses data from over 80% of Plumbing & Heating merchants' sales throughout Great Britain, accounting for about £3bn. There is no overlap or double counting between PHMI and Builders Merchant Building Index (BMBI).

GfK's Plumbing & Heating Point of Sale Tracking Data is 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 specialist plumbing & heating merchants. It is, in effect, the market.

PHMI trend data is indexed on the 12 months of 2019. Currently, data is available by total monthly value sales and the series tracks what is happening in the plumbing and heating market month by month. This trend series gives the industry access to far more accurate insights than has been available. MRA Research produces the Plumbing & Heating Merchant Index, a brand of the BMF, to provide reliable data, and a platform and voice for this important industry and for leading plumbing and heating brands to communicate to the wider market.

### PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts, speaking for their markets and building their brands, should contact Ralph Sutcliffe: [Ralph@mra-research.co.uk](mailto:Ralph@mra-research.co.uk) or Tom Rigby: [Tom@mra-research.co.uk](mailto:Tom@mra-research.co.uk)

### More data available

This PHMI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and 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 produce like-for-like market comparability tailored to the requirements of an individual business. 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).

# Overview and Insights

## Last year's Covid confusion helps plumbing and heating merchants double sales in May

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 111.6% in May 2021 compared to May 2020 (see [page 59](#)) - a time when many branches remained closed due to confusion over Covid-19 restrictions.

Compared with two years ago, May 2021 sales were flat (-0.1%), but with two less trading days this year average sales a day were 10.4% higher than in May 2019.

Total value sales in May were 4.3% lower than in April, with one less trading day this month ([page 60](#)). Average sales a day were 0.7% higher.

Sales in the three months March to May 2021 were 81.8% up on the same three months last year, helped by one more trading day this year and a fully opened market ([page 61](#)). Average sales a day were 78.8% higher.

Sales in March to May 2021 were 6.1% up on the same three months in 2019, with no difference in trading days.

Comparing the three months March to May 2021 with the previous 3 months (December to February) sales increased by 11.1%, helped by five more trading days in the most recent period ([page 62](#)). Average sales a day were 2.2% higher.

Sales in the first five months of 2021 were 36.5% higher than in January to May 2020, with one less trading day this year. Average sales a day were 37.8% higher.

Looking back two years, sales in the first five months of 2021 were 3.0% ahead of January to May 2019, with two less trading days this year. Average sales a day increased by 5.0%

Plumbing & Heating Merchants' sales in the 12 months June 2020 to May 2021 were 9.6% higher than in the same period a year earlier, with two more trading days in the most recent period. Average sales a day grew by 8.7%.

May's PHMI Index, which contrasts sales with the base period of January to December 2019, was 97.4 – see the table on [page 57](#) and the chart on [page 58](#). The table also shows the PHMI Index in the last three months (February to April) was higher, at 105.8.

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 111.6% in May 2021 compared with May 2020 – a time when many branches remained closed due to confusion over Covid-19 restrictions.

# Indices: Monthly and quarterly

June 2020 to May 2021

(Indexed on January to December 2019)

<b>Jun 20</b>	<b>Jul 20</b>	<b>Aug 20</b>	<b>Three months</b>
73.4	88.3	85.9	82.5
<b>Sep 20</b>	<b>Oct 20</b>	<b>Nov 20</b>	<b>Three months</b>
103.0	115.2	111.1	109.8
<b>Dec 20</b>	<b>Jan 21</b>	<b>Feb 21</b>	<b>Three months</b>
83.9	99.4	102.4	95.2
<b>Mar 21</b>	<b>Apr 21</b>	<b>May 21</b>	<b>Three months</b>
118.2	101.8	97.4	105.8

Indices are a measure that express sales values relative to a fixed base, enabling rapid performance comparisons to be made. The Plumbing & Heating Merchant Index uses total sales in 2019 to create monthly and quarterly base periods. These represent average performance.

The figures above express how the periods compare with the 2019 base:

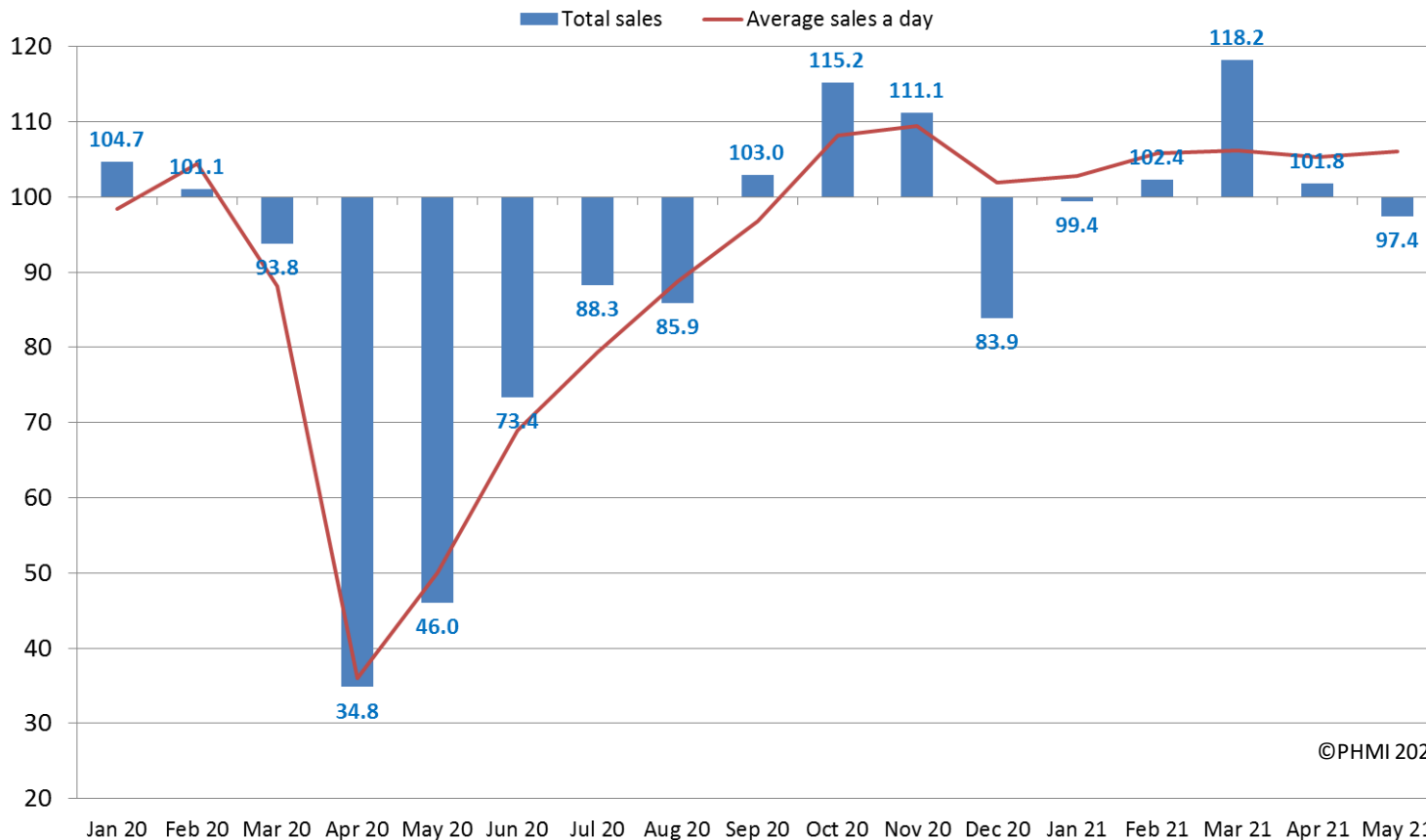
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, April's index of 101.8 means turnover was 1.8% above the base period.
- Values below 100 indicate lower turnover in that period. May's Index of 97.4 means turnover was 2.6% lower than the base period.

 **Source:** GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to May 2021

# Monthly: Index

Adjusted and unadjusted for trading days\*

## Indices: January 2020 to May 2021



Values shown  
for Total sales

©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to May 2021

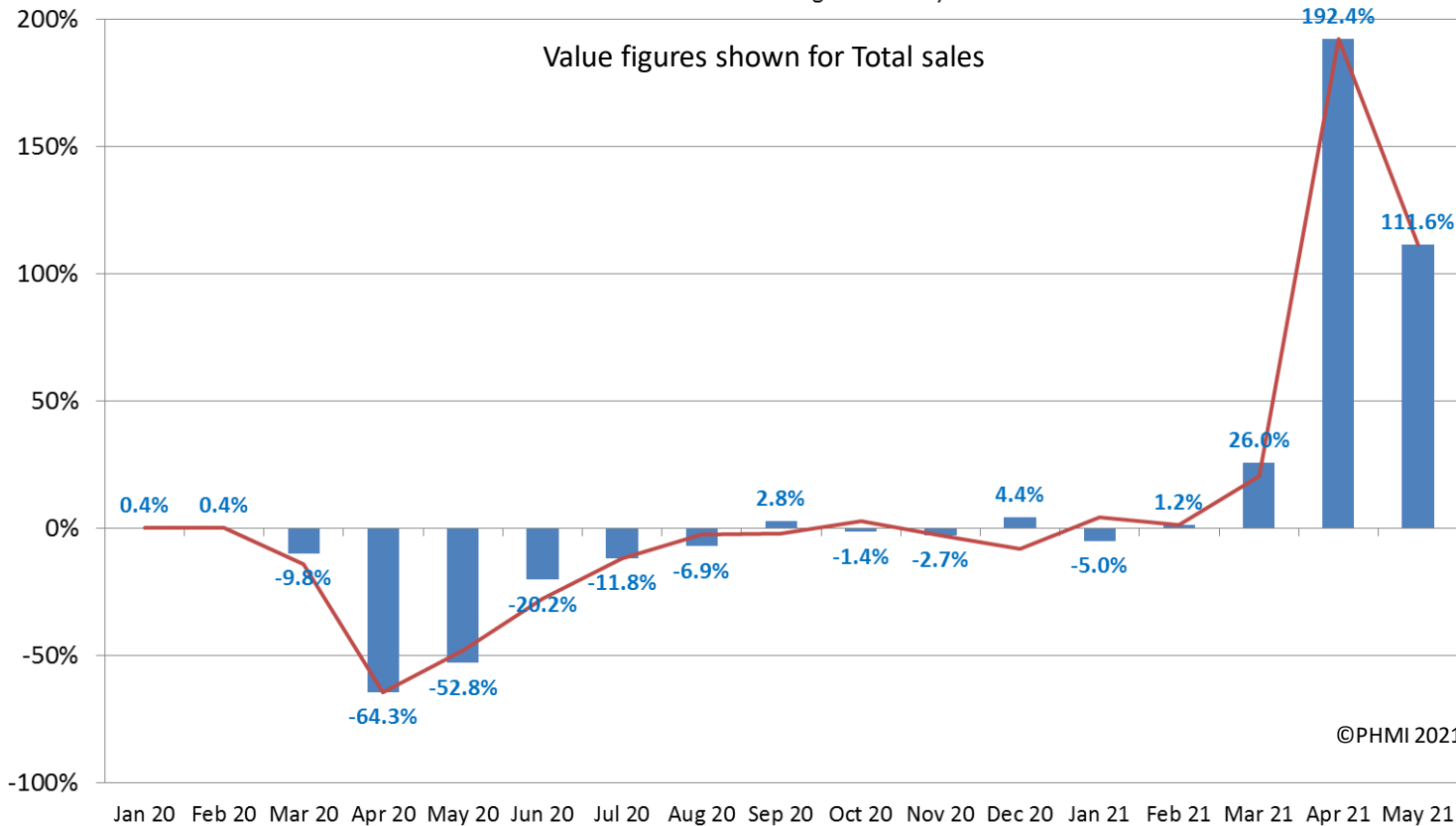
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

# Monthly: This Year v Last Year


Sales indices, adjusted and unadjusted  
for trading days\*

## Month: year on year

■ Total sales — Average sales a day



+111.6% is more than double last year's value sales.

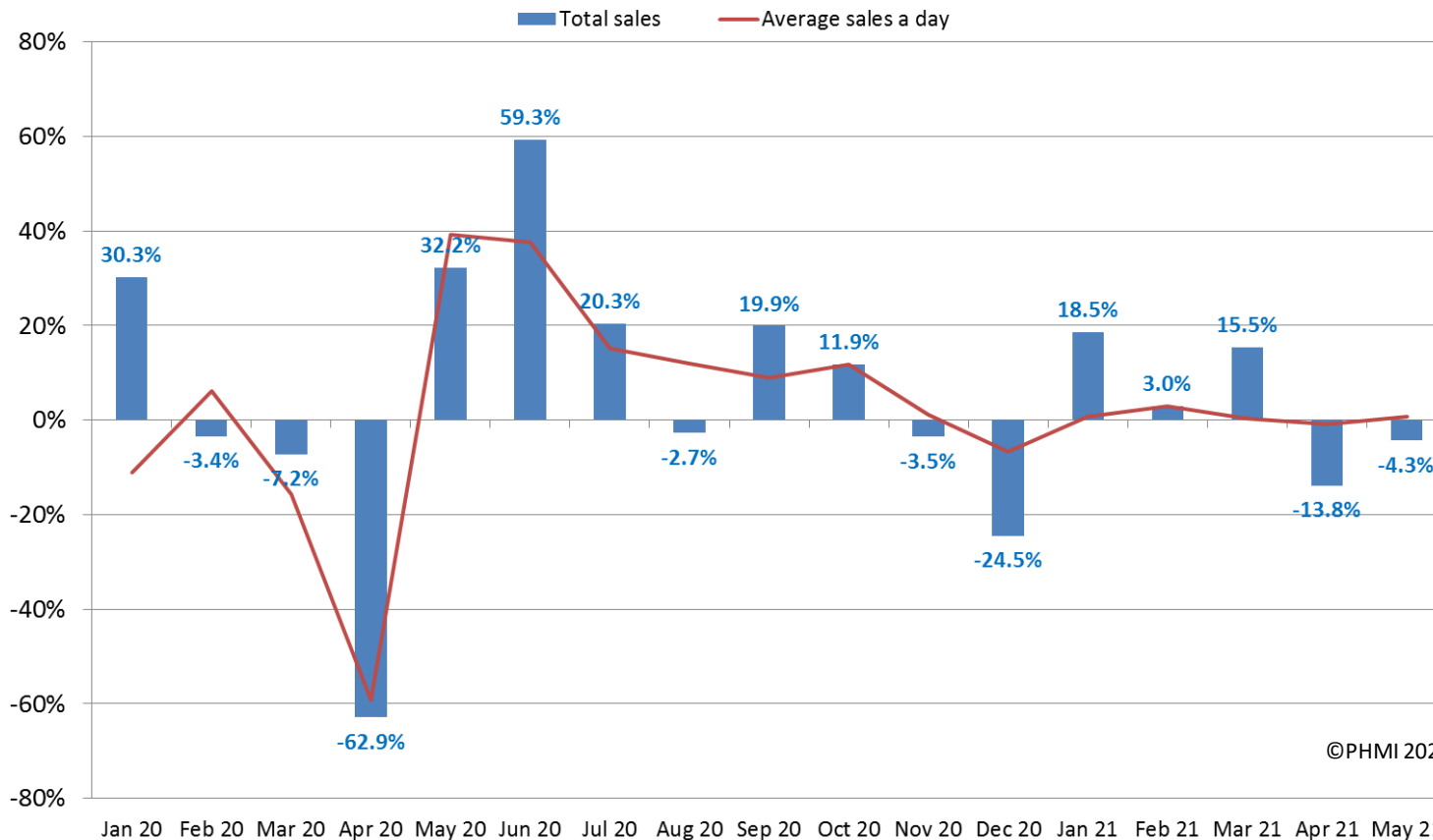
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to May 2021



# Monthly: Month v previous month

Sales indices, adjusted and unadjusted  
for trading days\*

## Month v previous month



Values shown  
for Total sales

©PHMI 2021

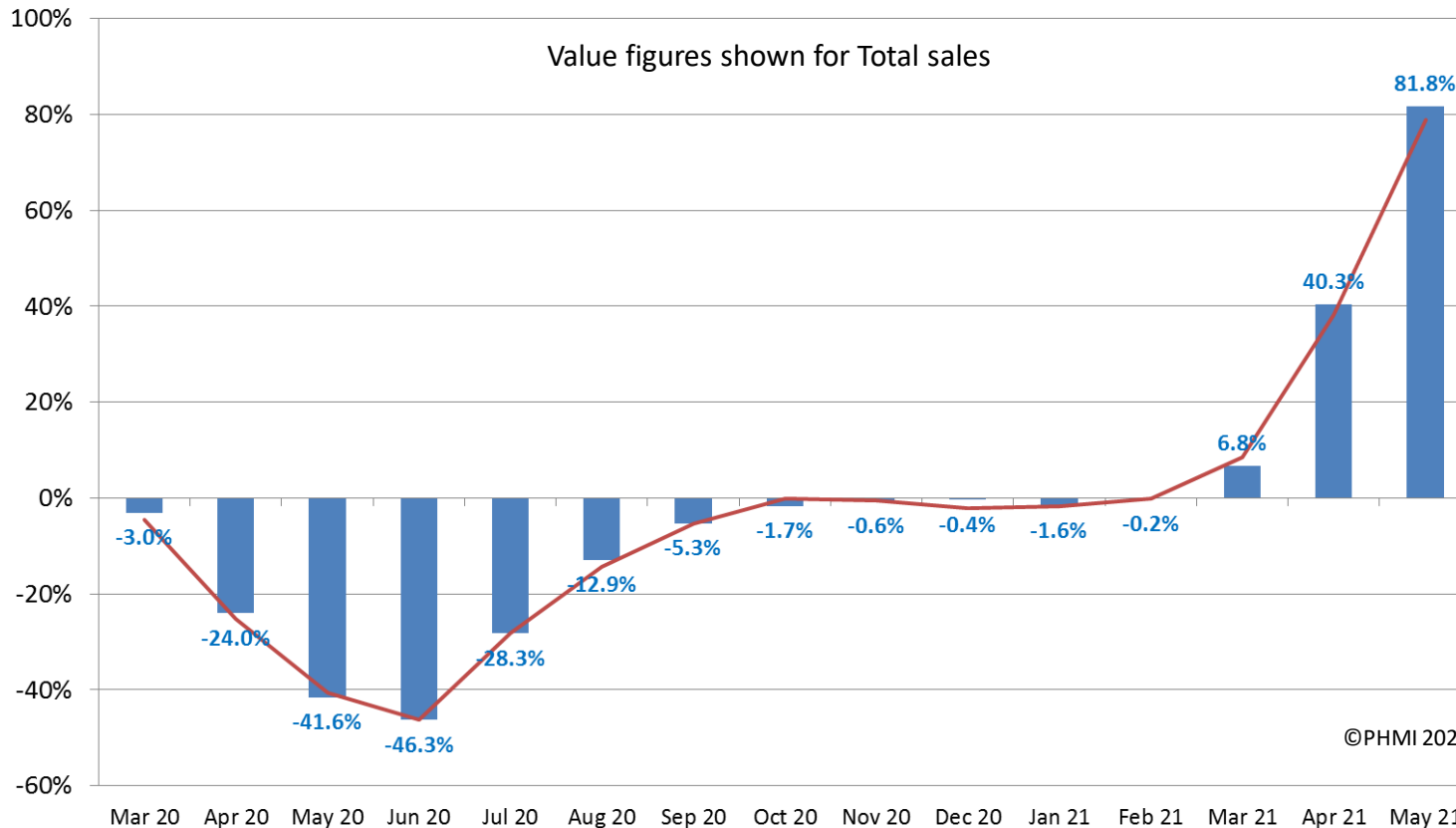
 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to May 2021

# Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted  
for trading days\*

## Rolling 3 months: year on year

■ Total sales    — Average sales a day



Eg. May 21 shows sales in the three months March to May were 81.8% higher than the same three months last year.

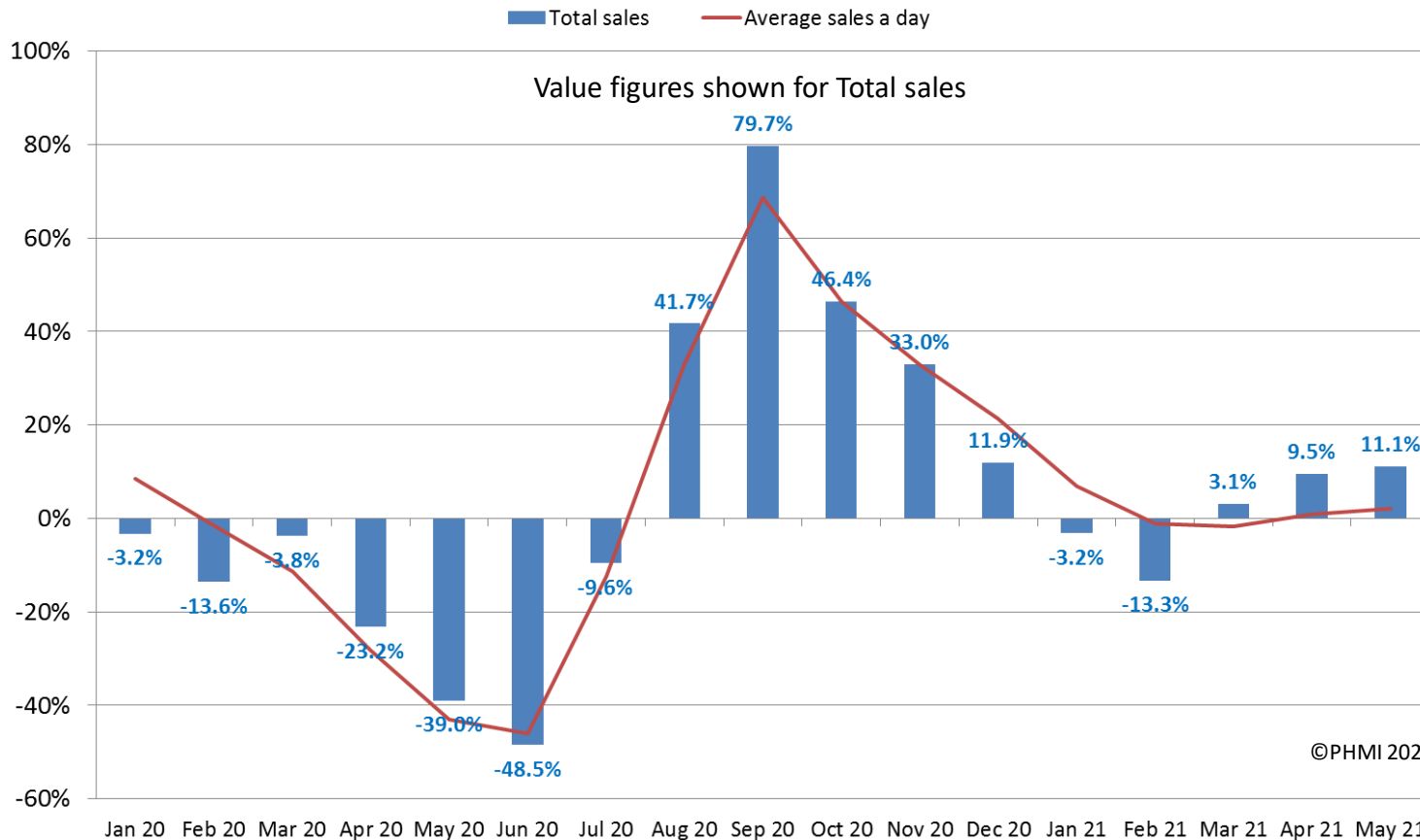
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to May 2021

# Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted  
for trading days\*

## Rolling 3 months v previous 3 months



Eg. May 21 shows the three months Mar-May were 11.1% higher than the three months Dec 20 to Feb 21

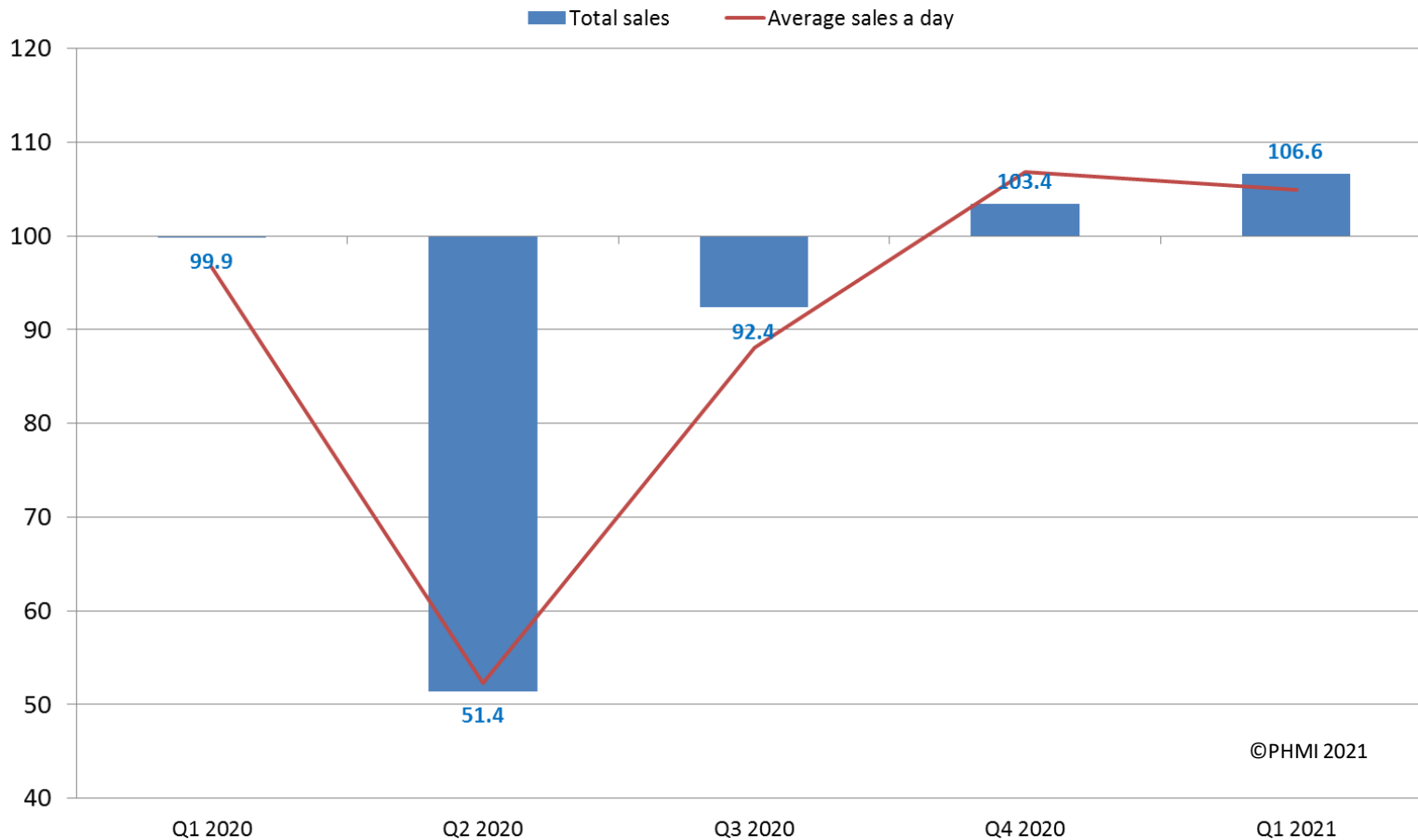
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to May 2021

# Quarterly: Index

Adjusted and unadjusted for trading days

## Indices: Q1 2020 to Q1 2021



Value figures  
shown for Total  
sales

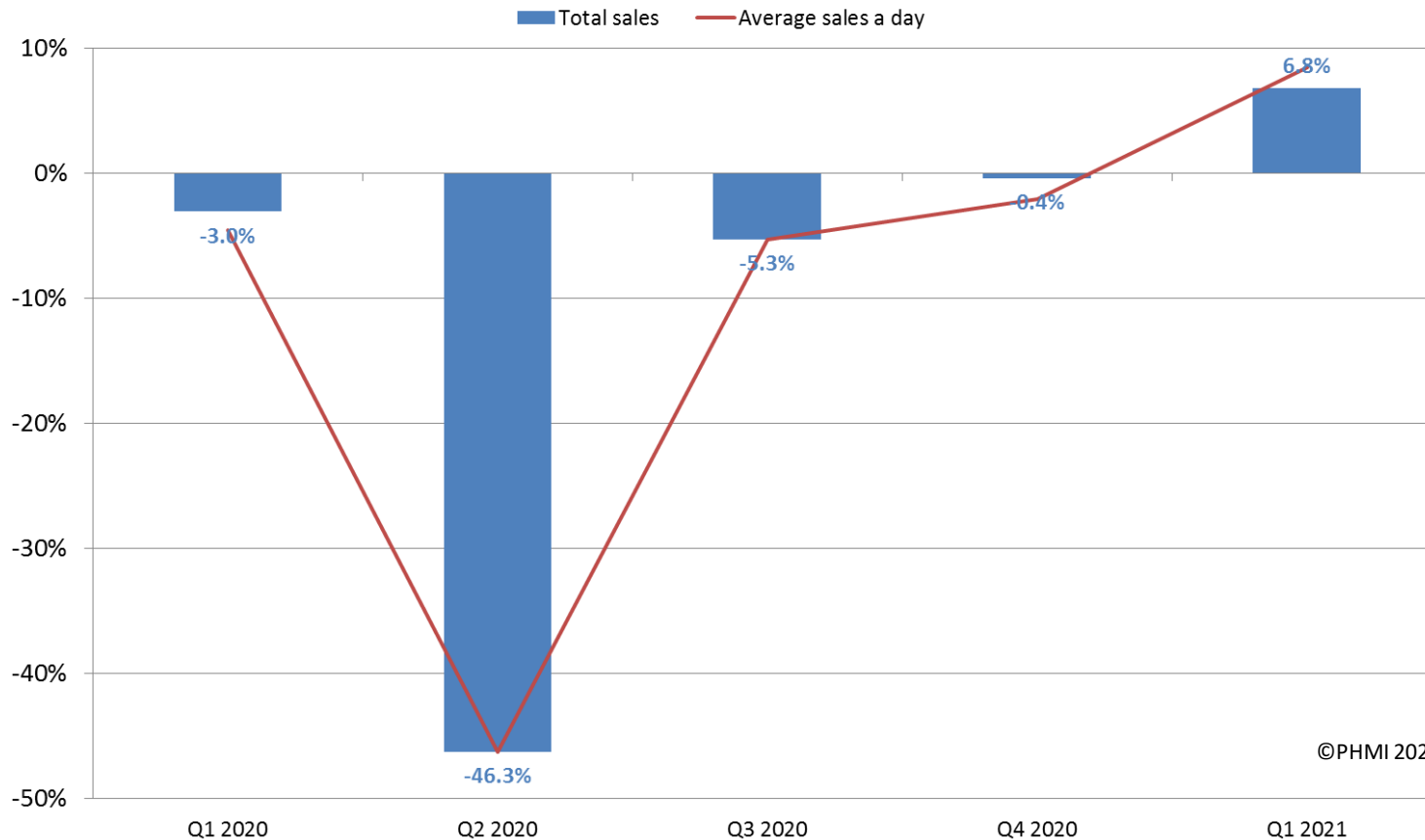
©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Mar 2021

# Quarterly: This Year v Last Year

Sales indices, adjusted and unadjusted  
for trading days\*

## Quarter: year on year



Value figures  
shown for Total  
sales

©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Mar 2021

\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

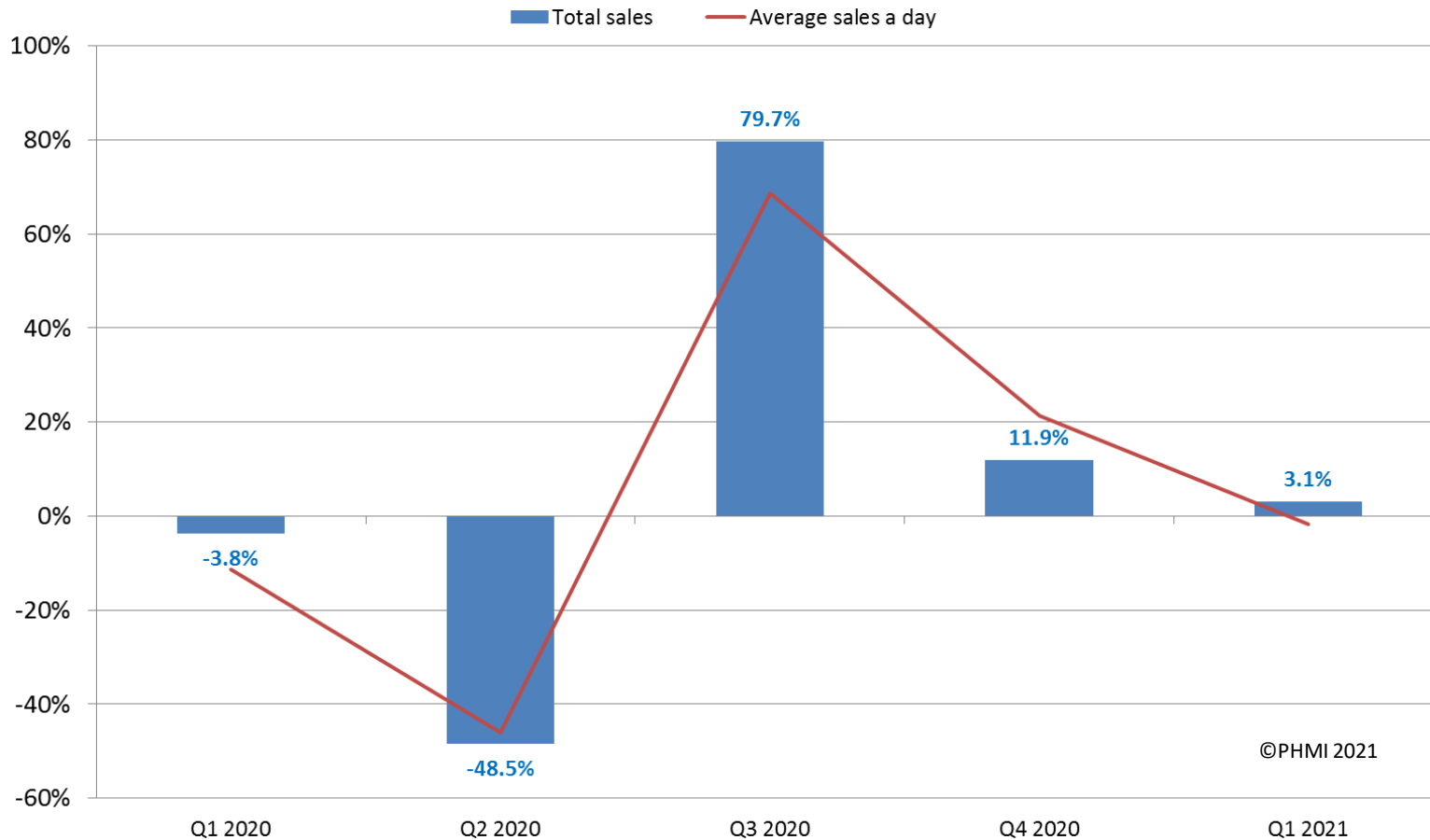
# Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted  
for trading days

Plumbing & Heating  
Merchant Index



## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

**GfK** Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Mar 2021

# PHMI 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							

**Quarterly**  
Index: 62.3

2020			
Q1	Q2	Q3	Q4
64	61	65	60
2021			
Q1	Q2	Q3	Q4
63			

**Half Year**

2020	
H1	H2
125	125
2021	
H1	H2

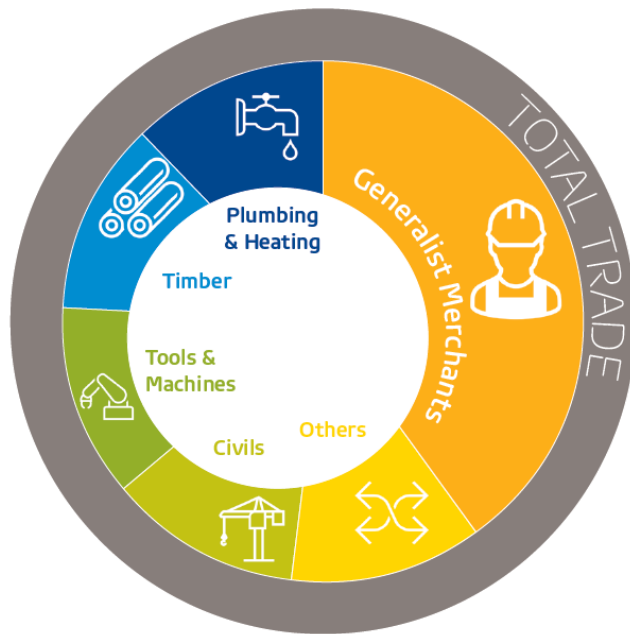
**Full Year**

2020
250
2021

\*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.

 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to May 2021

# Plumbing & Heating channel definition and merchants



## Plumbing Specialists

Plumbing & Hardware Specialists are small outlets handling nails, hardware products, pipes, ironware, paint, faucets, sanitary products, bathroom accessories, ceramic tiles and heating equipment such as boilers, radiators & heating controls.

Their main turnover is generated with product groups such as installation, paint & plumbing/hardware product groups (e.g. nails, saws, scissors, keys).

## Plumbing Merchants

Large outlets handling nails, hardware products, pipes, ironware, paint, faucets, sanitary products, bathroom accessories & kitchen, bathroom furniture, bath tubs and heating equipment such as boilers, radiators & heating controls. Compared with Plumbing Specialists they are bigger & generate a higher turnover.

Their main turnover is generated with bath/kitchen faucets, sanitary & complementary products, bathroom accessories, tiles and bath tubs and bathroom furniture.

Turnover is generated with professional end users (B2B) as well as private end users (B2C).

Merchant partners include:



Plumbing Trade Supplies





# Contacting PHMI

## PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts and speaking for their markets and building their brands should contact Tom Rigby or Ralph Sutcliffe:



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