

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**February 2021**

(Published 21 April 2021)

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).

## Plumbing and heating merchants sales increase in February 2021

February 2021 plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 1.2% on February 2020, with no difference in trading days. (See [page 48](#)). This is an improvement on last month with January 2021 sales 5.0% lower than in January 2020.

Value sales in February 2021 were 3.0% higher than in January ([page 50](#)), with no difference in trading days.

The last three months (December 2020 to February 2021) saw sales 0.2% lower than in the same three months a year earlier, with no difference in trading days ([page 49](#)).

Comparing the same three months (December 2020 to February 2021) with the previous three months (September to November 2020) there was a larger fall of 13.3% ([page 51](#)). However there were eight fewer trading days in the most recent period and taking these into account average sales a day were 1.1% lower than in September to November. It's also likely the impact of Lockdown 3 (which affected both January and February 2021) affected inside work more than work outside.

January's PHMI Index, which contrasts sales with the base period of January to December 2019, was 102.4 – see the table on [page 46](#) and the chart on [page 47](#). The table also shows the PHMI Index in the last three months (November 2020 to January 2021) was marginally weaker, at 95.2, but with five less trading days.

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# Indices: Monthly and quarterly

March 2020 to February 2021

(Indexed on January to December 2019)

<b>Mar 20</b>	<b>Apr 20</b>	<b>May 20</b>	<b>Three months</b>
93.8	34.8	46.0	58.2
<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

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:

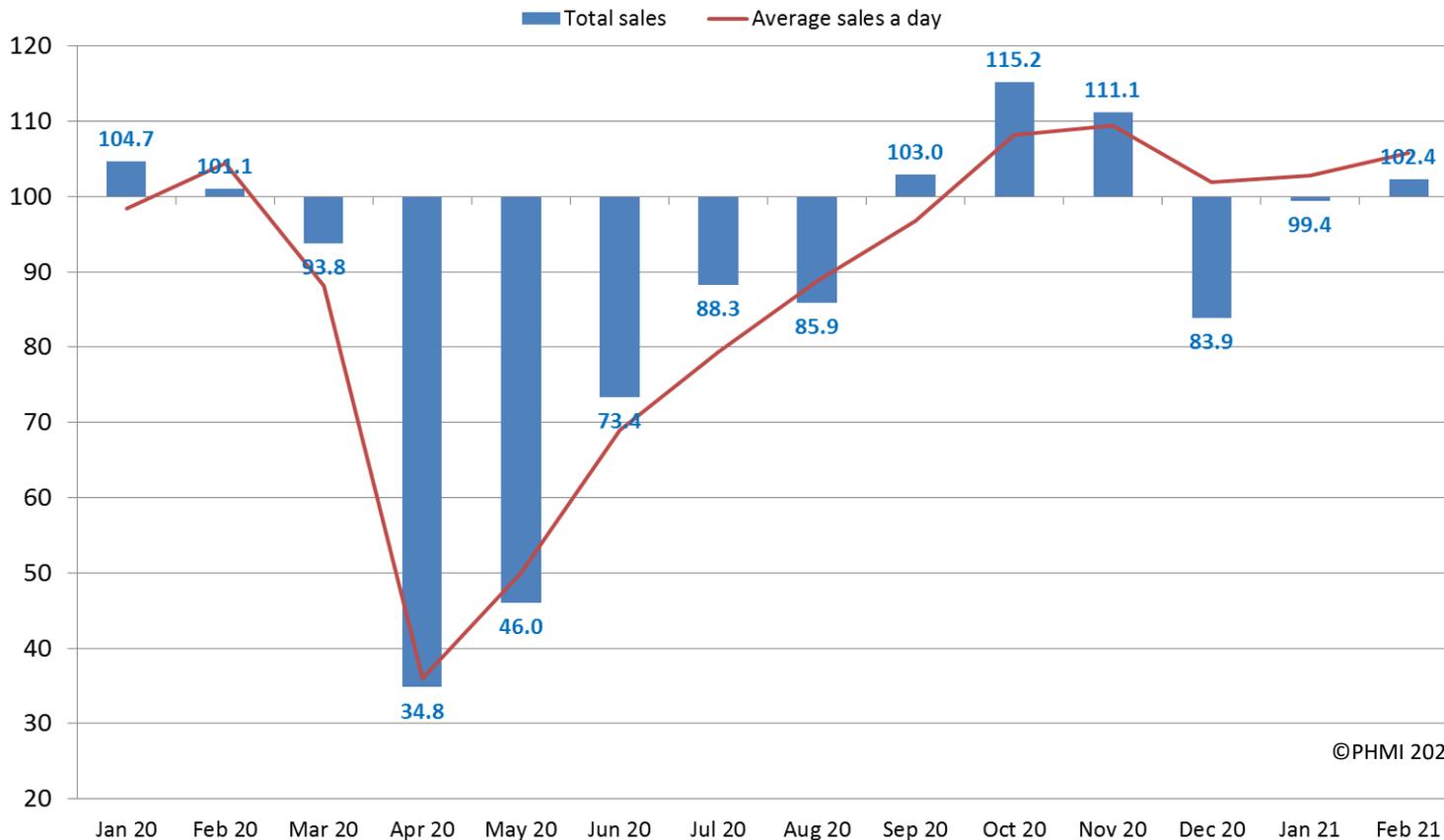
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, October's index of 115.2 means turnover was 15.2% above the base period.
- Values below 100 indicate lower turnover in that period. May's Index of 46.0 means turnover was 54.0% lower than the base period.

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

# Monthly: Index

Adjusted and unadjusted for trading days\*

## Indices: February 2020 to February 2021



Value figures shown for Total sales

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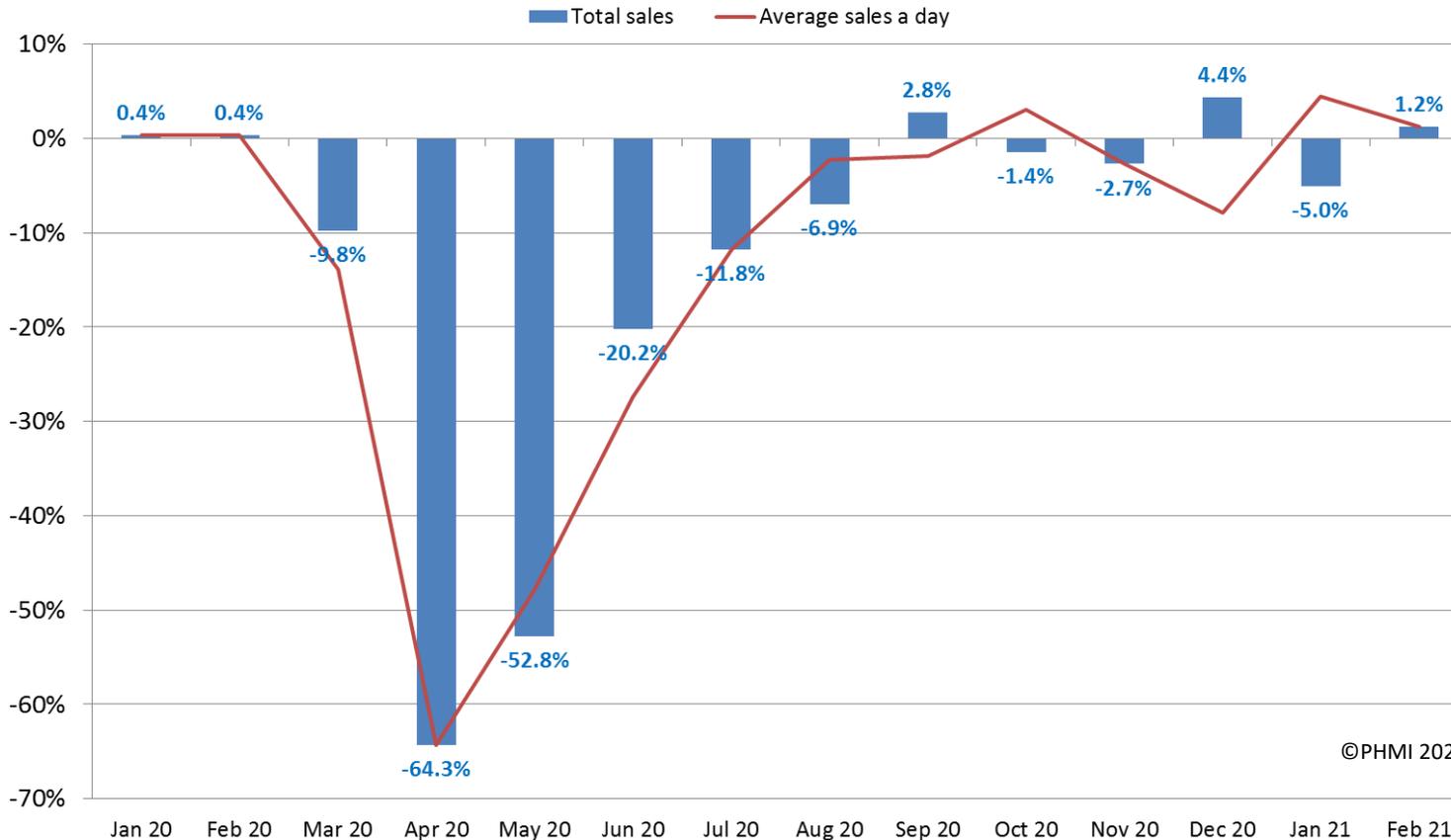
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Feb 2021

\*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



Value figures  
shown for Total  
sales

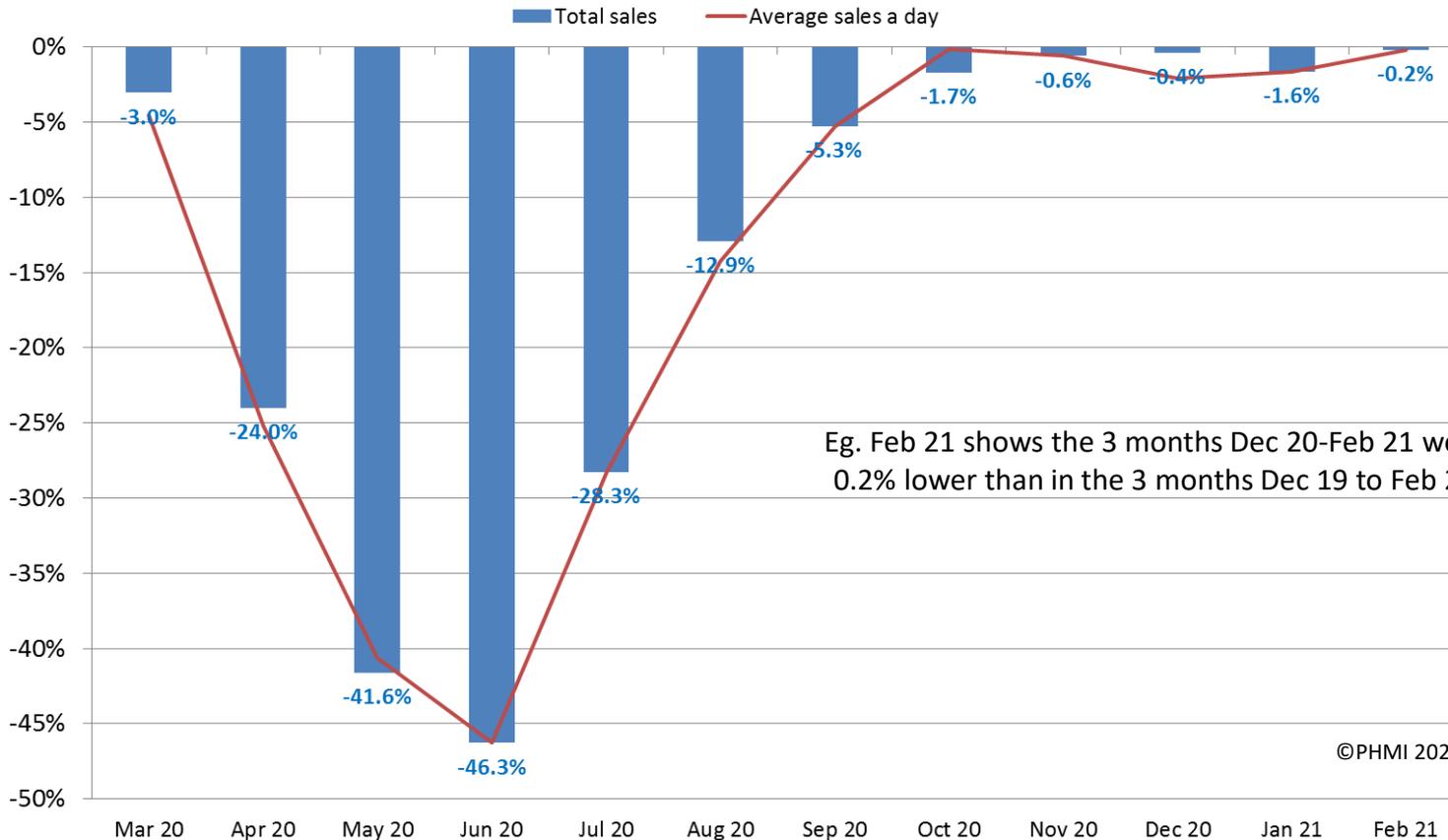
©PHMI 2021

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

# Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted  
for trading days\*

## Rolling 3 months: year on year



Value figures shown for Total sales

Eg. Feb 21 shows the 3 months Dec 20-Feb 21 were 0.2% lower than in the 3 months Dec 19 to Feb 20

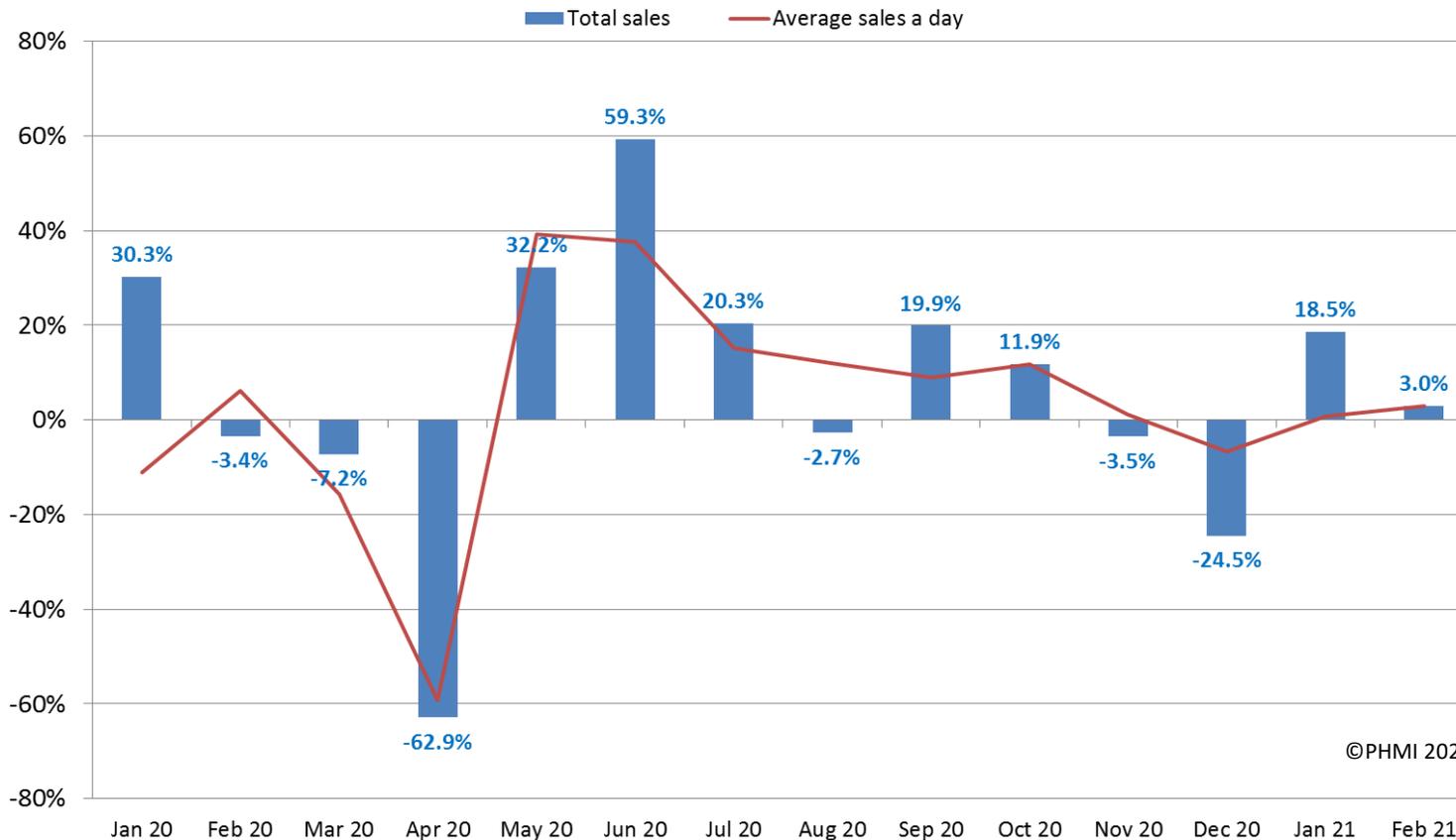
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 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Feb 2021

# Monthly: Month v previous month

Sales indices, adjusted and unadjusted  
for trading days\*

## Month v previous month



Value figures  
shown for Total  
sales

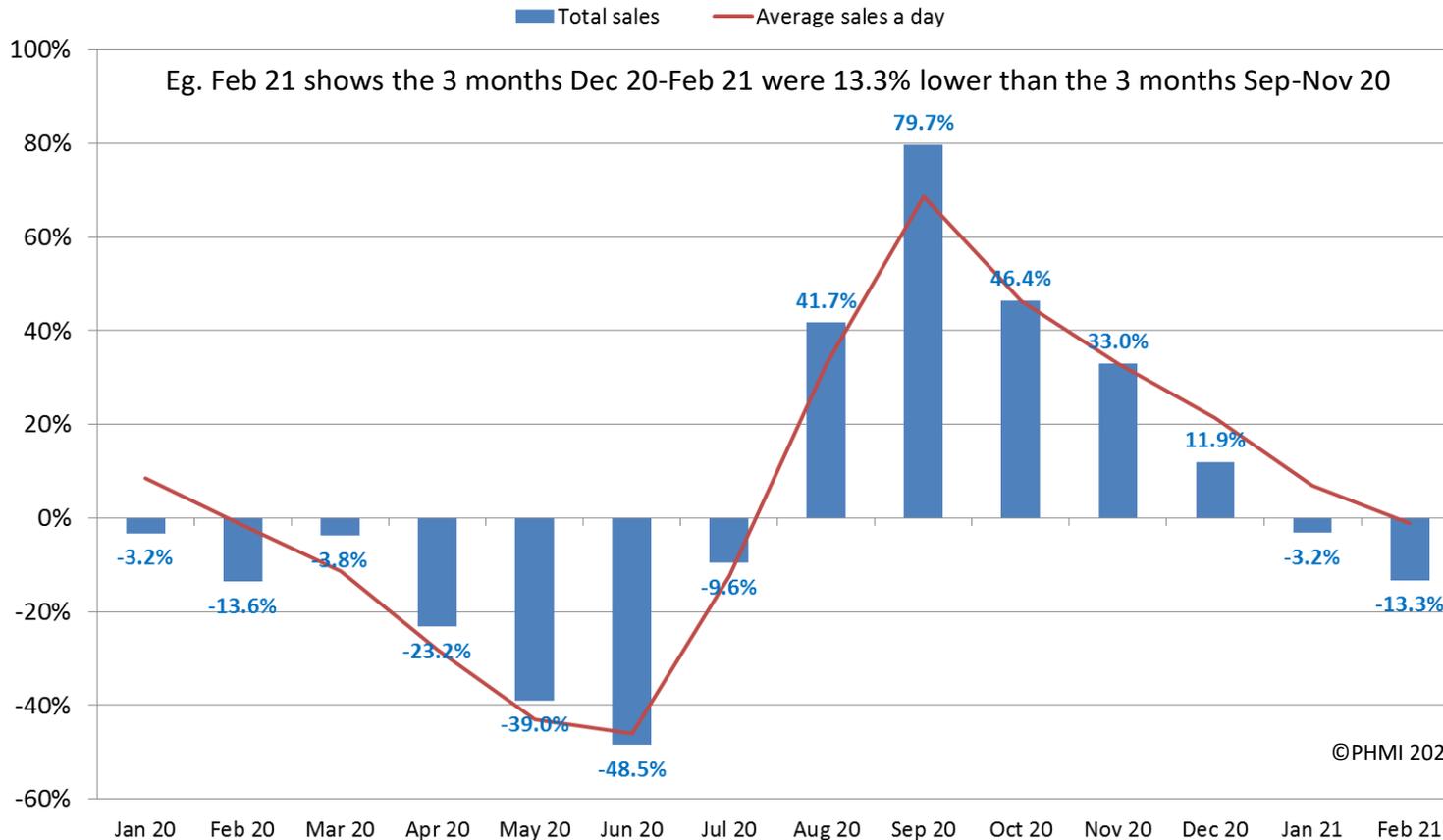
©PHMI 2021

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

# Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted  
for trading days\*

## Rolling 3 months v previous 3 months



Value figures  
shown for Total  
sales

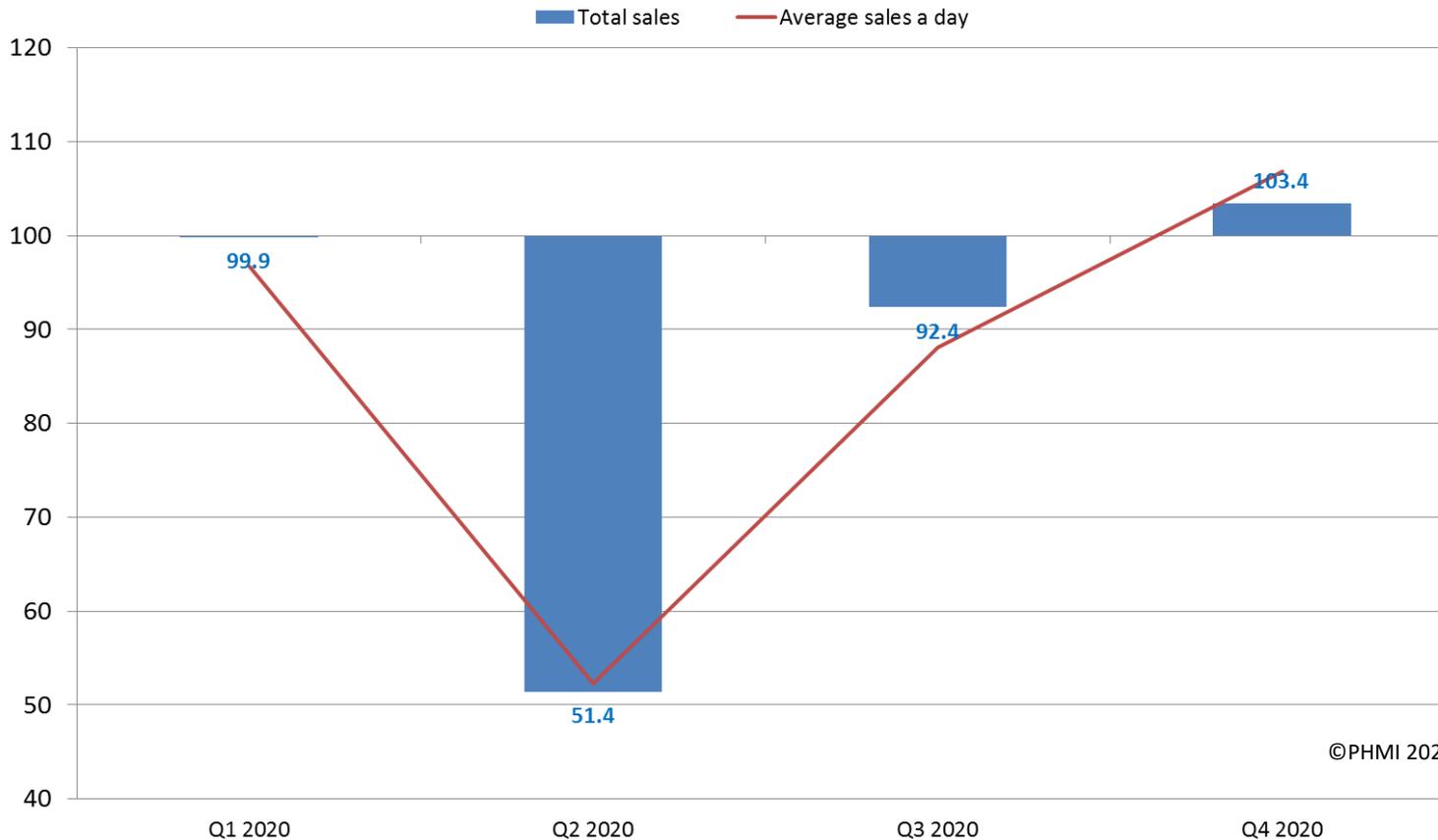
\*Some merchants temporarily closed branches between March and May 2020 and this will have affected trading day comparisons.

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

# Quarterly: Index

Adjusted and unadjusted for trading days

## Indices: Q1 2020 to Q4 2020



Value figures  
shown for Total  
sales

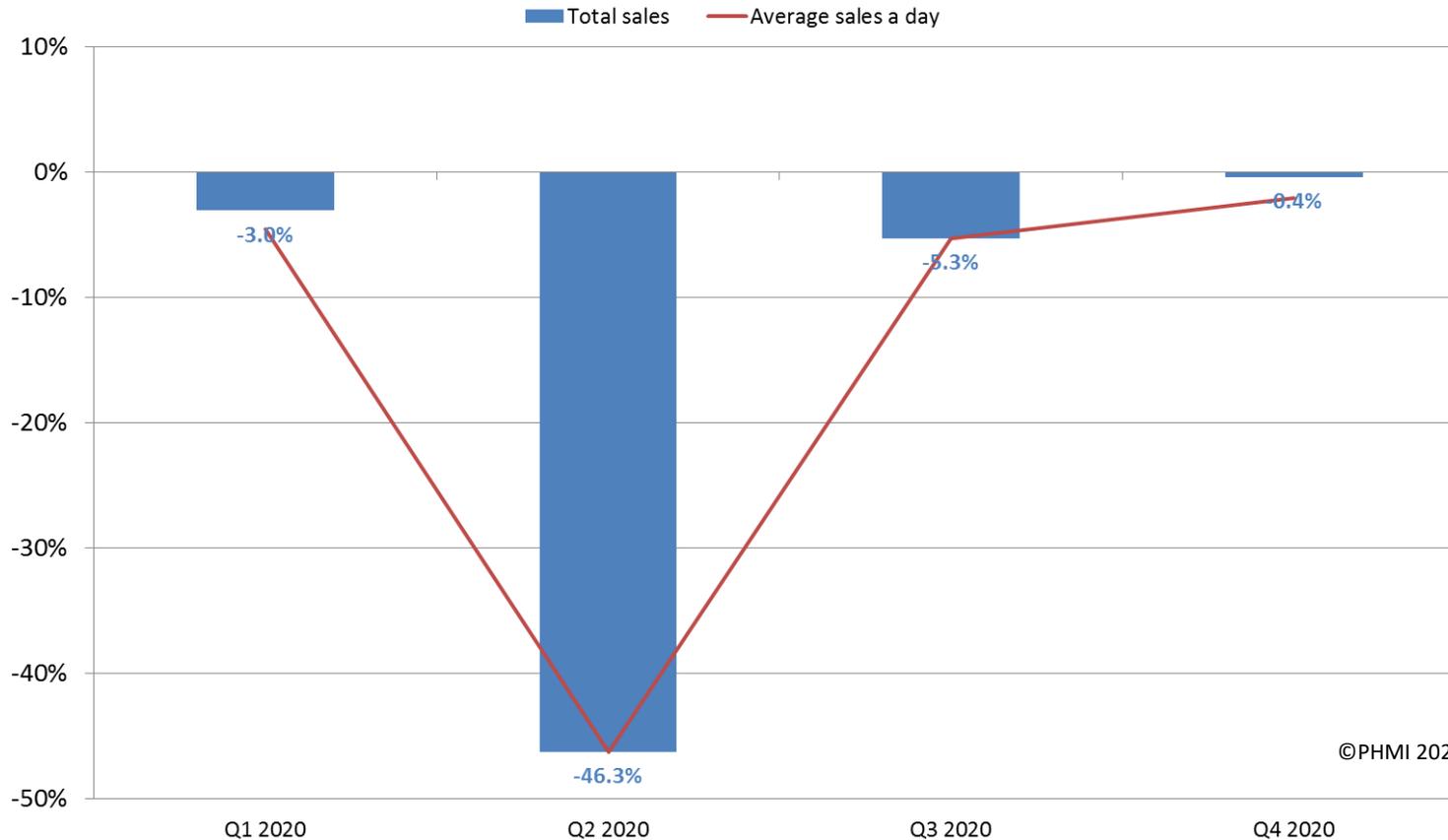
©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Dec 2020

# 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

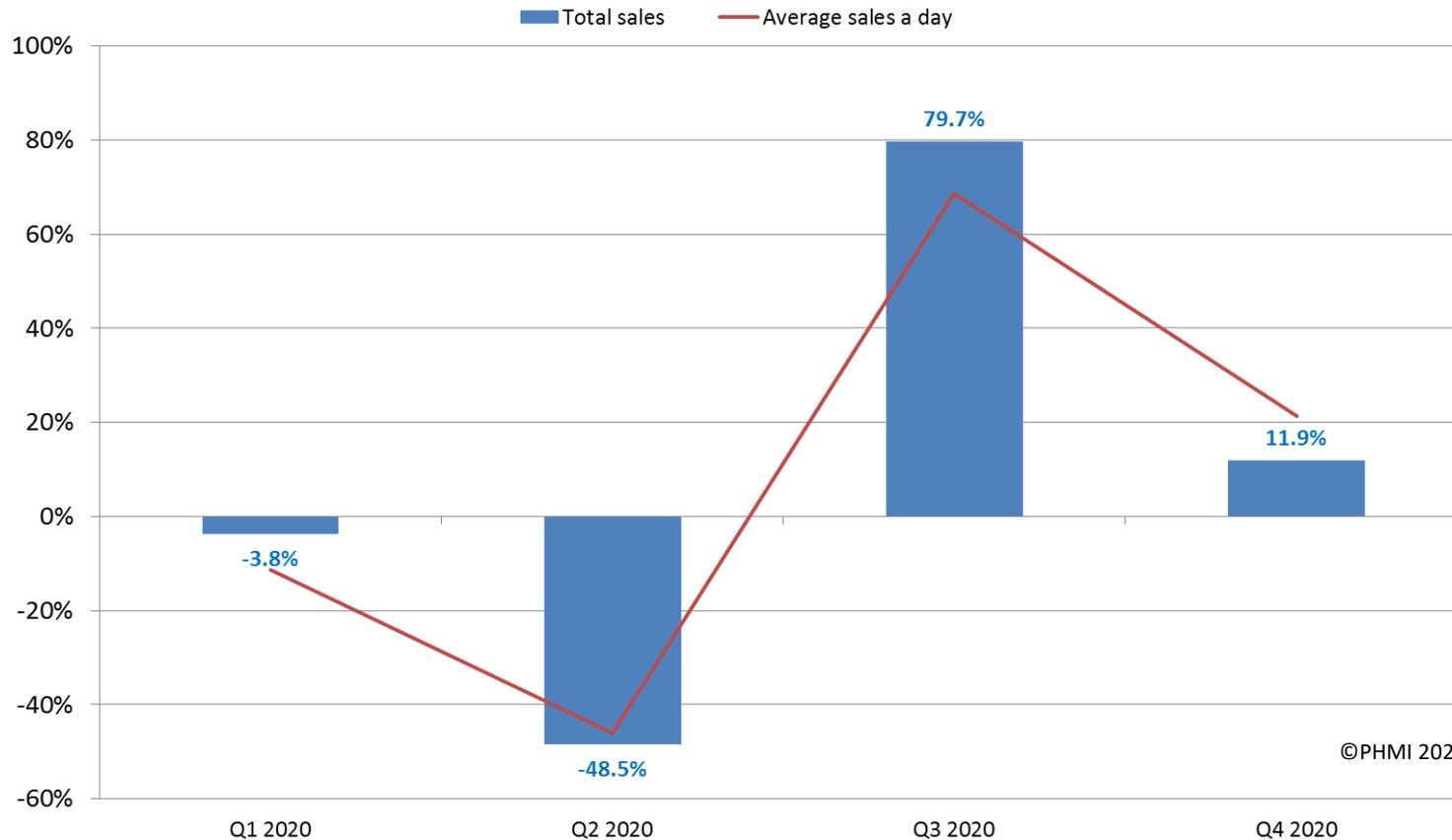
 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Dec 2020

\*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

## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

 Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Dec 2020

# 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										

**Quarterly**  
Index: 62.3

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

**Half Year**

2020	
H1	H2
125	125
2021	
H1	H2

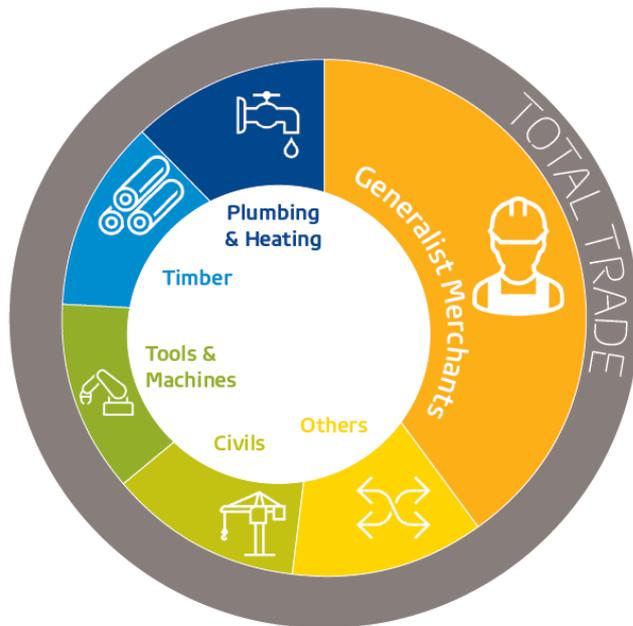
**Full Year**

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.

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