

“building **excellence**
in materials supply”

Plumbing & Heating Merchant Index



January 2021

(Published 19 March 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 or Tom Rigby: 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.

A mixed start to 2021 for plumbing and heating merchants

January 2021 plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were down 5.0% on January 2020. The start of Lockdown 3 may have impacted adversely on inside work and there were two less trading days this year. However, average sales a day in January, which take trading day differences into account, were 4.5% higher than in January last year. (See [page 8](#)).

Sales in January 2021 were 18.5% higher than in December, helped by three more trading days in January ([page 10](#)). Average sales a day were 0.7% higher.

The last three months (November 2020 to January 2021) saw sales 1.6% lower than in the same three months a year earlier, with no difference in trading days ([page 9](#)).

Comparing the same three months (November 2020 to January 2021) with the previous three months (August to October 2020) saw a larger fall of 3.2% ([page 11](#)). The potential impact on inside work of Lockdown 2 in November and Lockdown 3 in January may have contributed to the decline. However there were also six fewer trading days in the most recent period and taking these into account saw average sales a day 6.9% higher than in August to October.

January's PHMI Index, which contrasts sales with the base period of January to December 2019, was 99.4 – see the table on [page 6](#) and the chart on [page 7](#). The table also shows the PHMI Index in the last three months (November 2020 to January 2021) was marginally weaker, at 98.1, but with four less trading days.

January 2021 plumbing and heating product sales by plumbing and heating merchants, were down 5.0% on January 2020. The start of 'Lockdown 3' may have impacted adversely on inside work and there were two less trading days this year.

Indices: Monthly and quarterly

February 2020 to January 2021

(Indexed on January to December 2019)

Plumbing & Heating
Merchant Index




Feb 20	Mar 20	Apr 20	Three months
101.1	93.8	34.8	76.6
May 20	Jun 20	Jul 20	Three months
46.0	73.4	88.3	69.2
Aug 20	Sep 20	Oct 20	Three months
85.9	103.0	115.2	101.3
Nov 20	Dec 20	Jan 21	Three months
111.1	83.9	99.4	98.1

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:

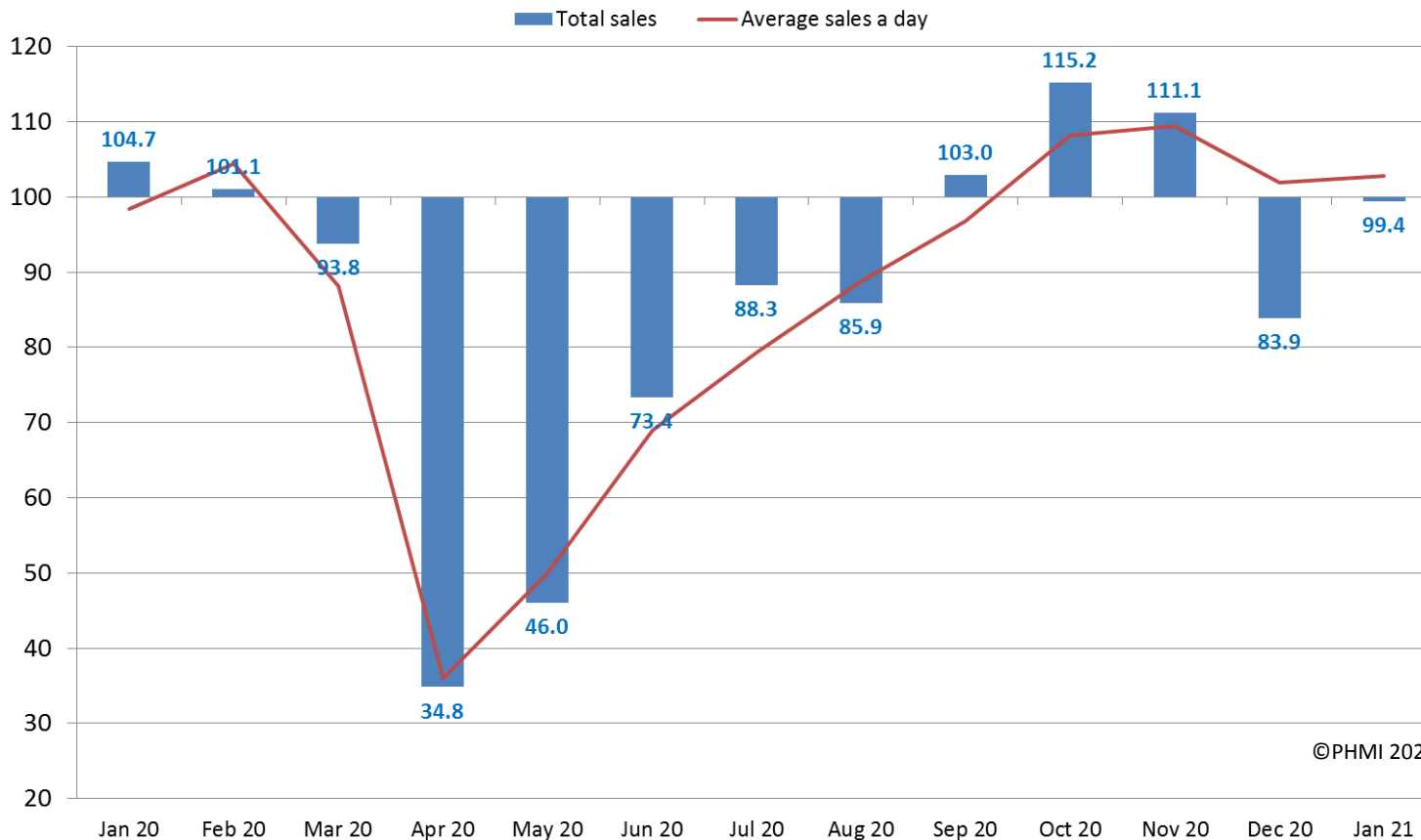
- If turnover was exactly the same, the Index would be 100.
- Values over 100 indicate higher turnover in that period. For example, October's index of 115.2 means turnover was 15.2% above the base period.
- Values below 100 indicate lower turnover in that period. May's Index of 46.0 means turnover was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

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

Monthly: Index


Adjusted and unadjusted for trading days*

Indices: January 2020 to January 2021



Value figures shown for Total sales

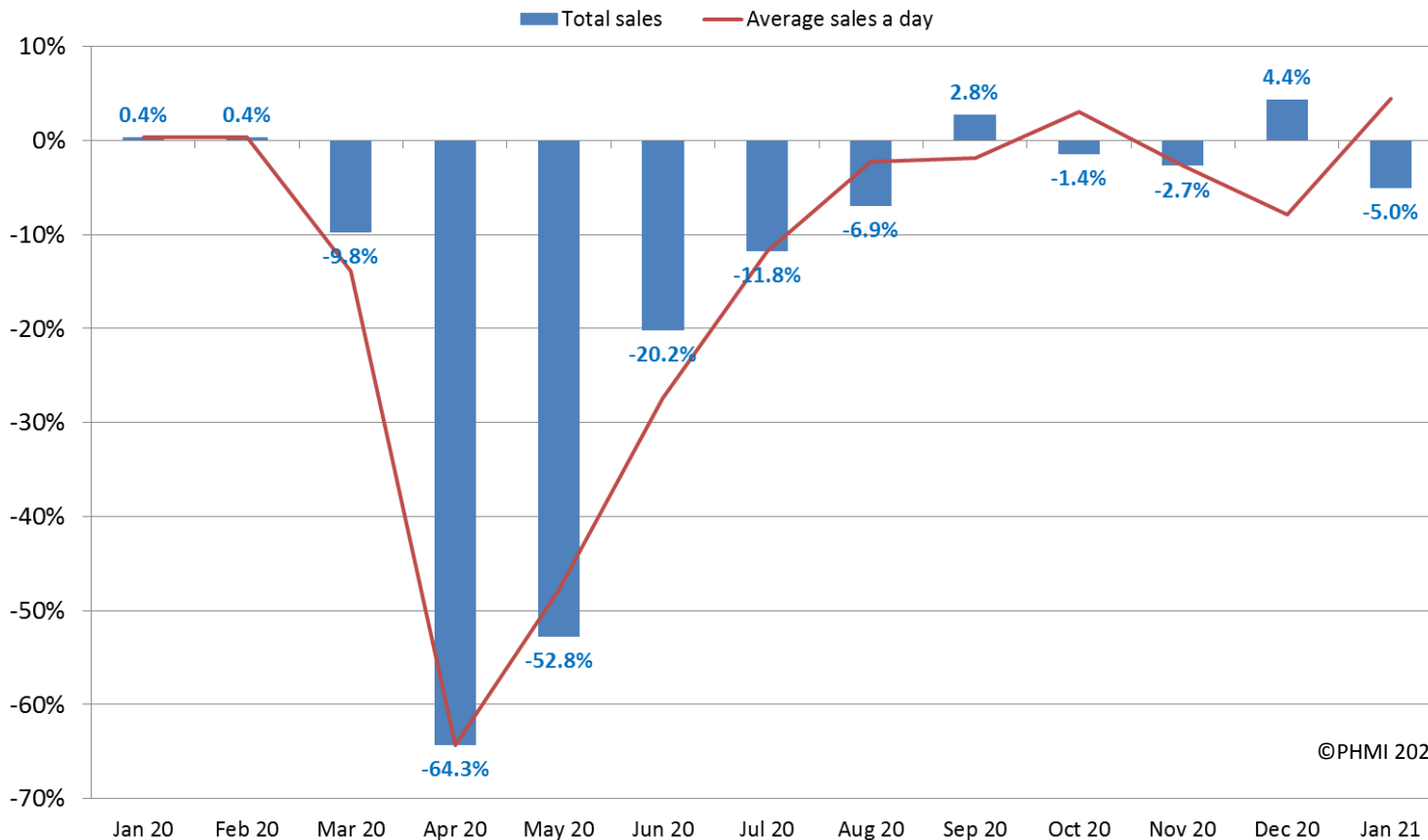
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 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Jan 2021

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 Jan 2021

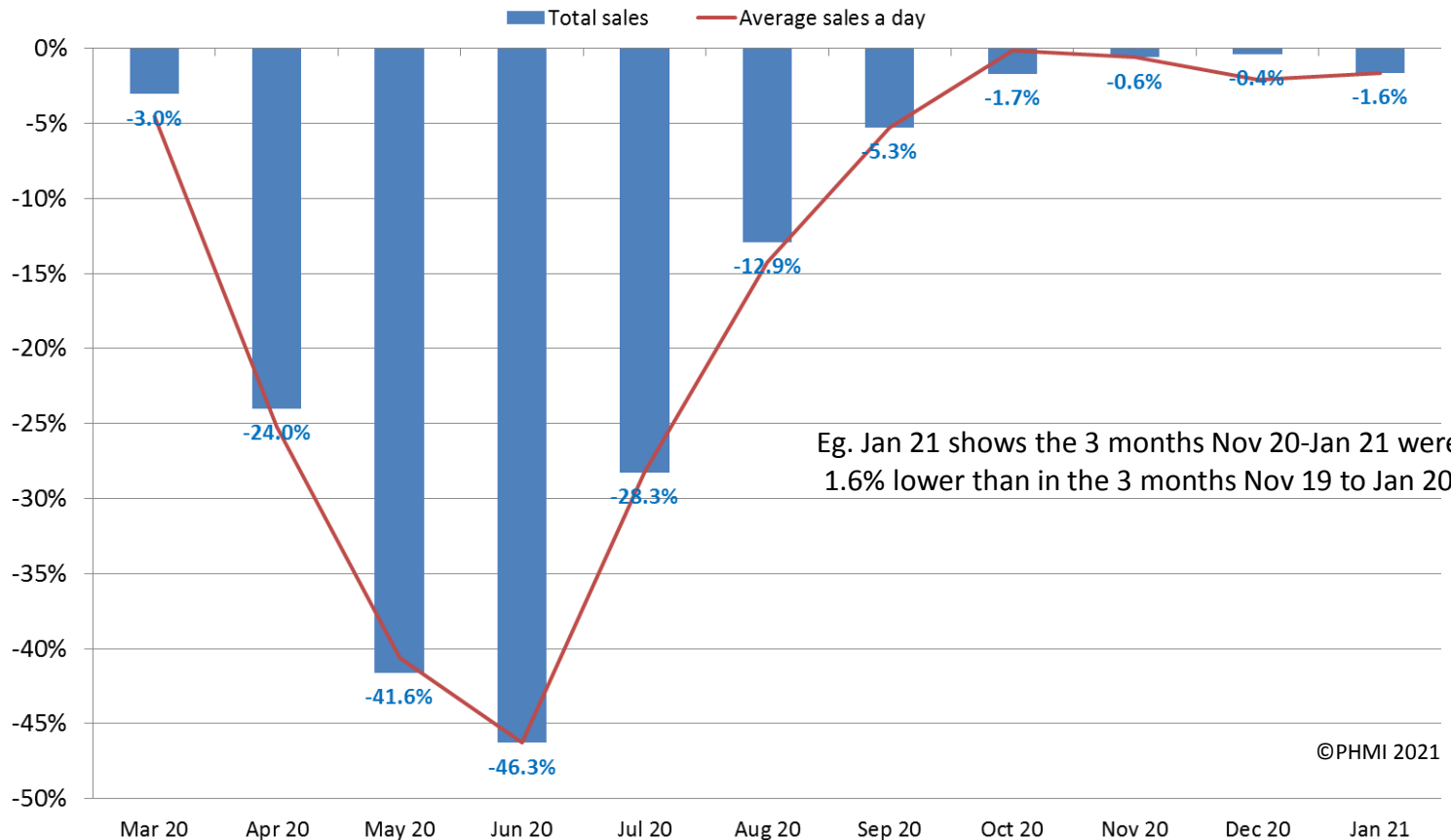
Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Rolling 3 months: year on year



Value figures
shown for Total
sales

Eg. Jan 21 shows the 3 months Nov 20-Jan 21 were
1.6% lower than in the 3 months Nov 19 to Jan 20

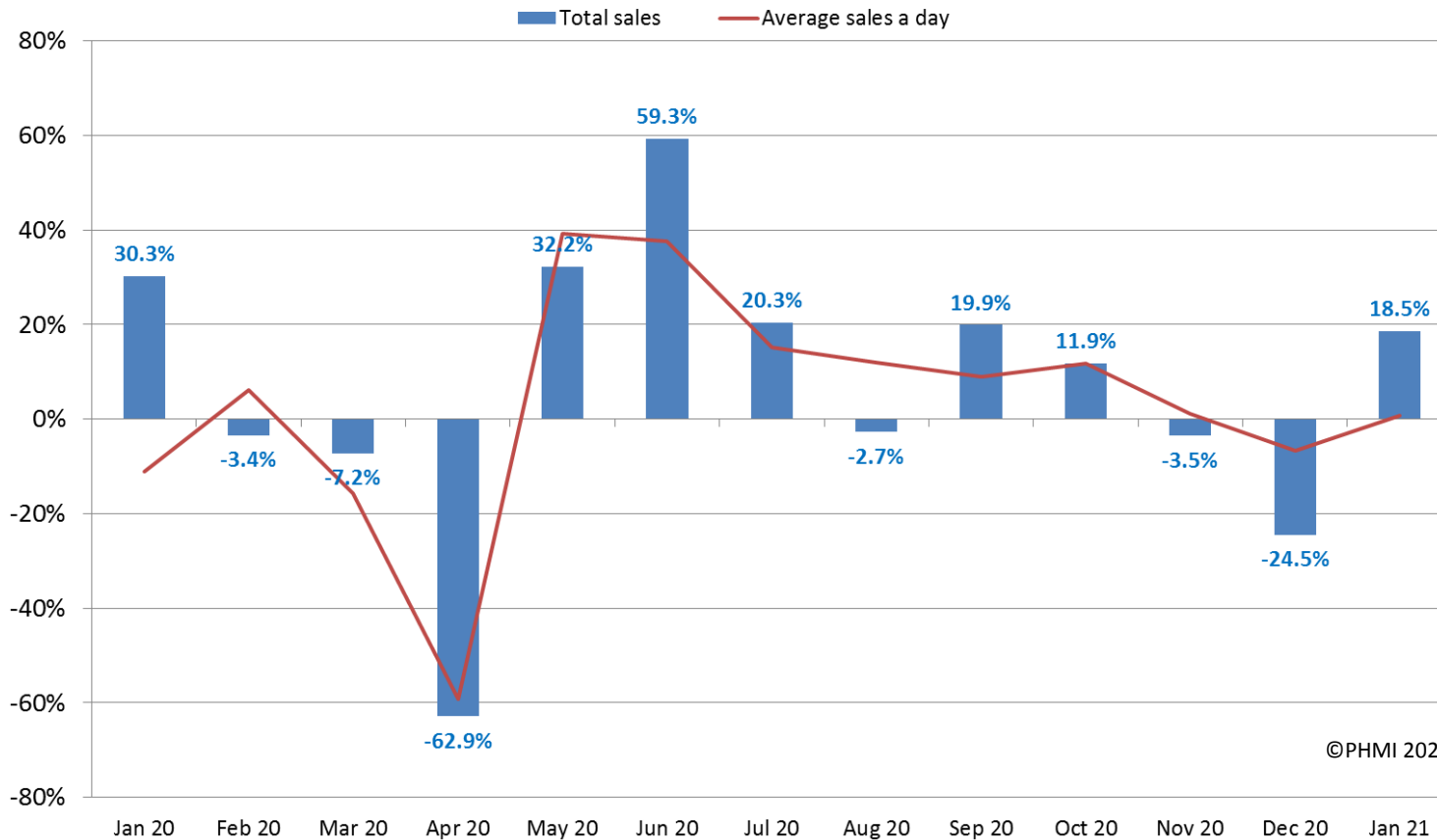
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GfK Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Jan 2021

Monthly: Month v previous month


Sales indices, adjusted and unadjusted
for trading days*

Month v previous month



Value figures
shown for Total
sales

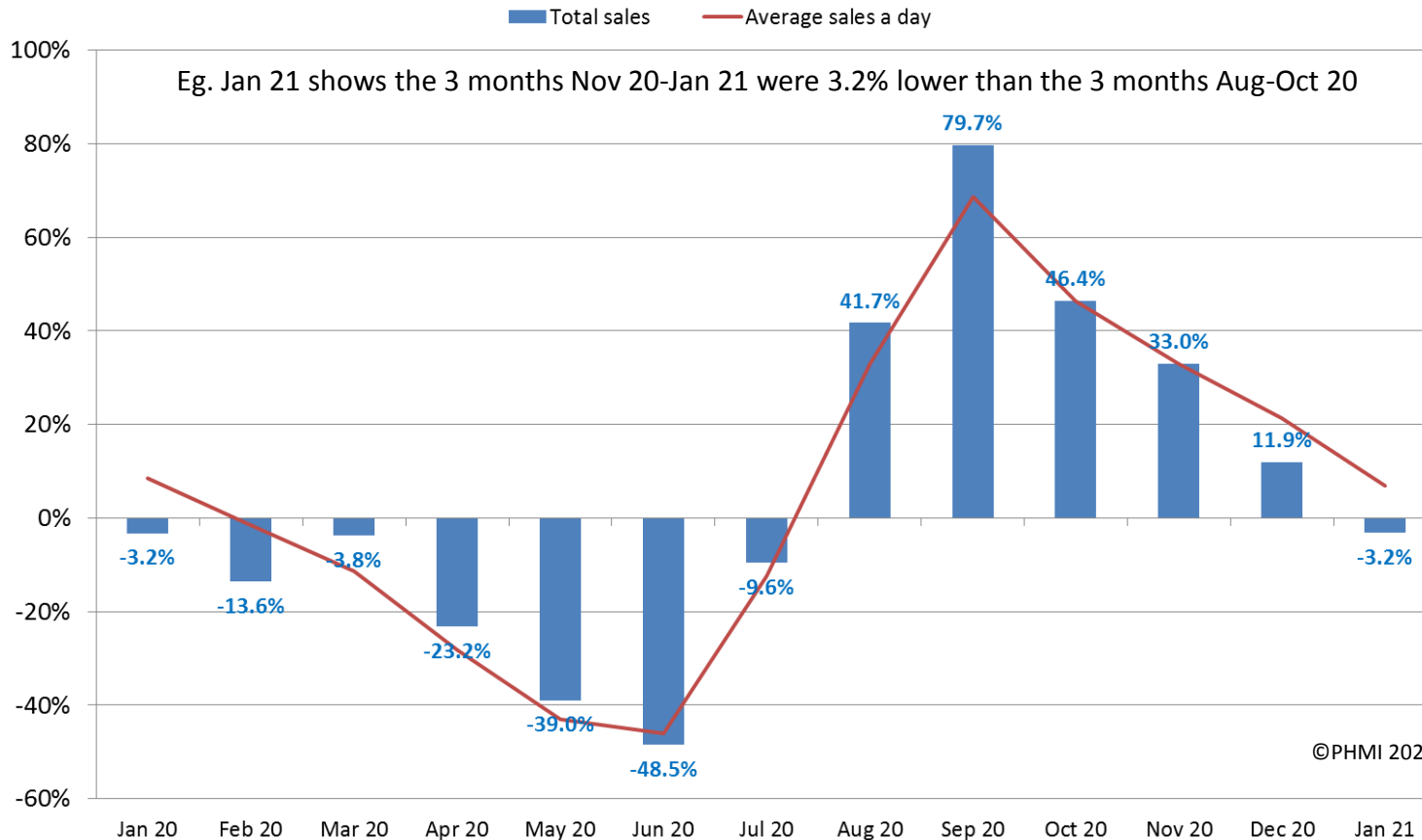
©PHMI 2021

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

©PHMI 2021

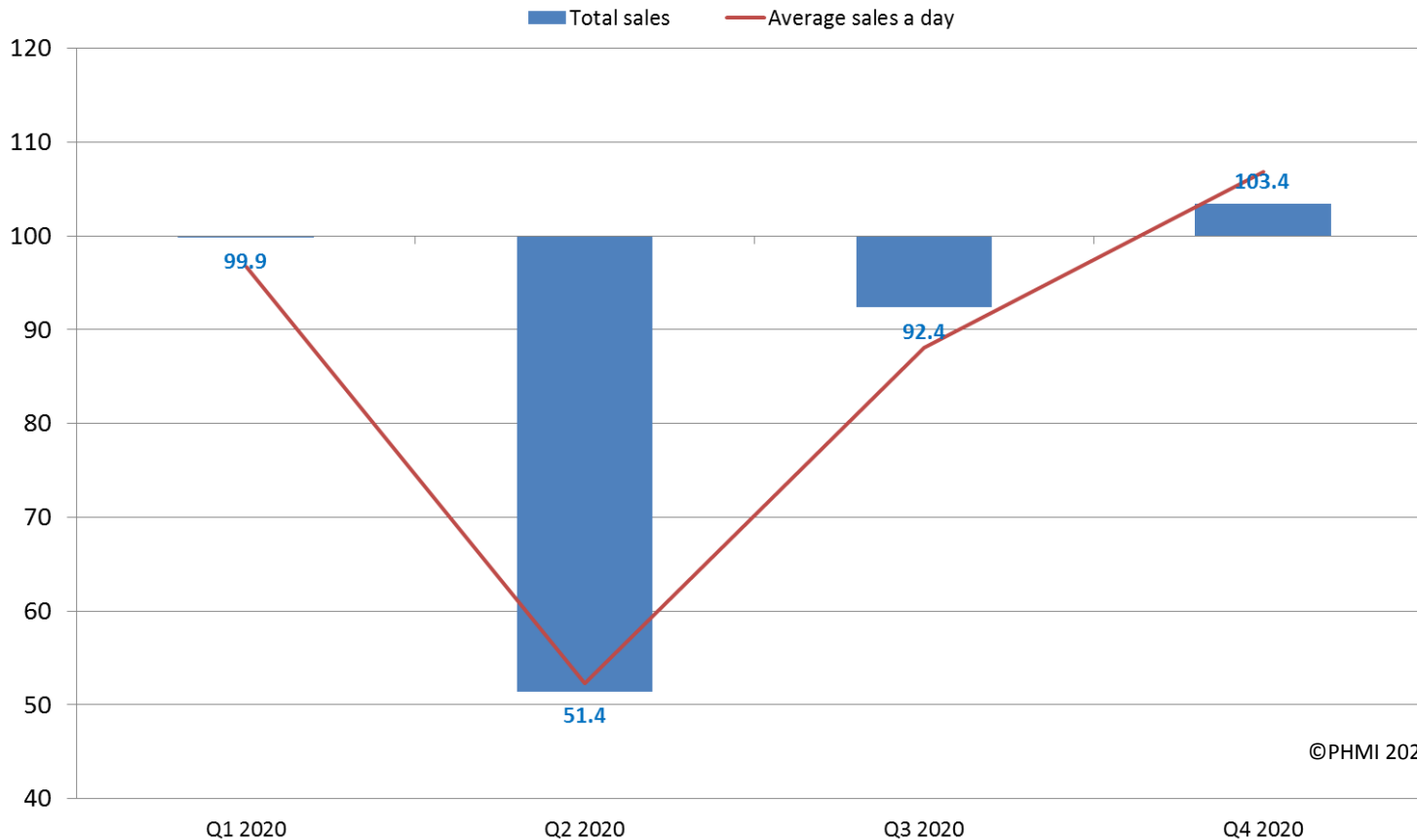
 Source: GfK's Plumbing & Heating Point of Sale Tracking Data, Jan 2019 to Jan 2021

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

Quarterly: Index

Adjusted and unadjusted for trading days

Indices: Q1 2020 to Q4 2020



Value figures
shown for Total
sales

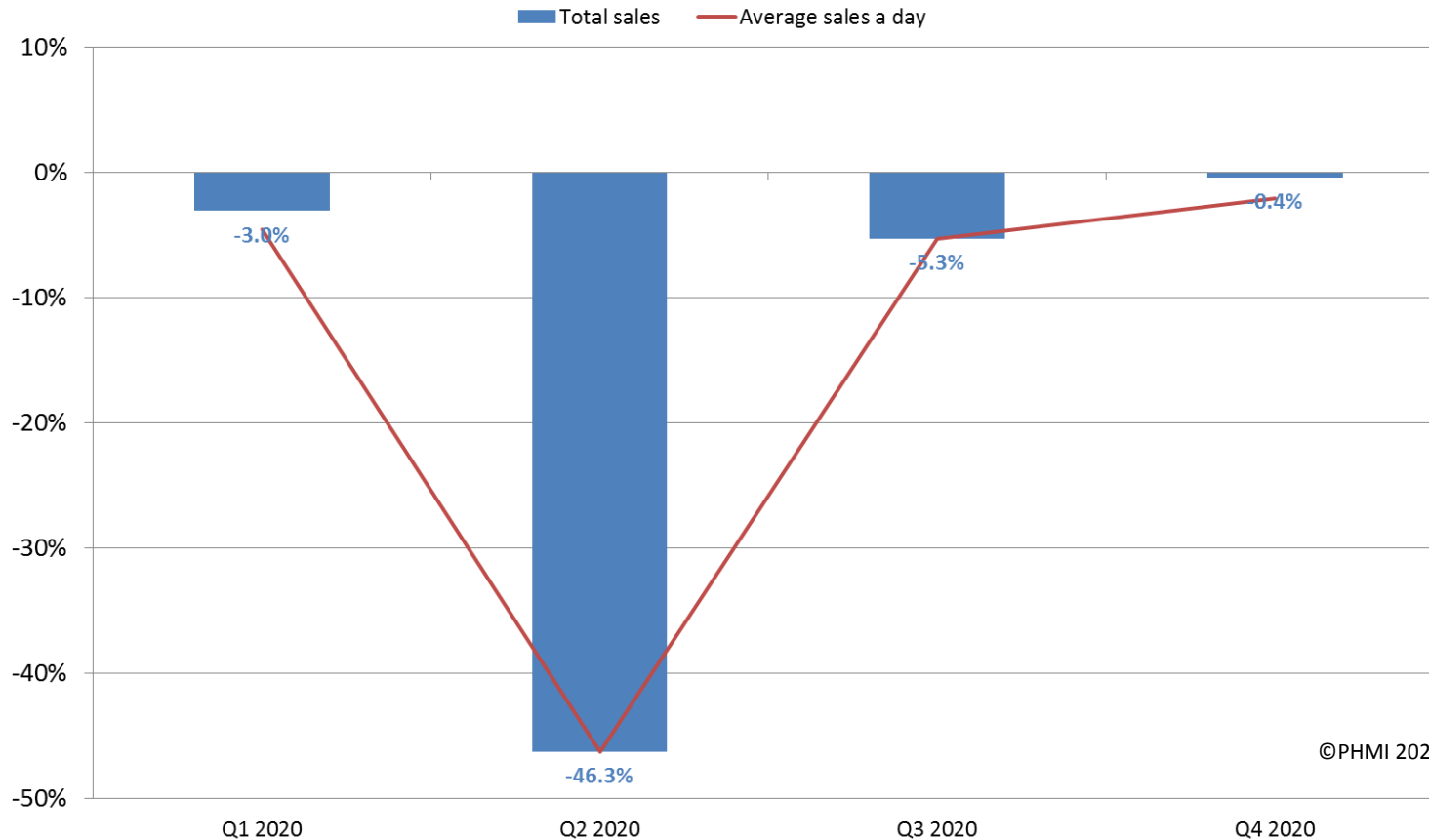
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 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Dec 2020

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

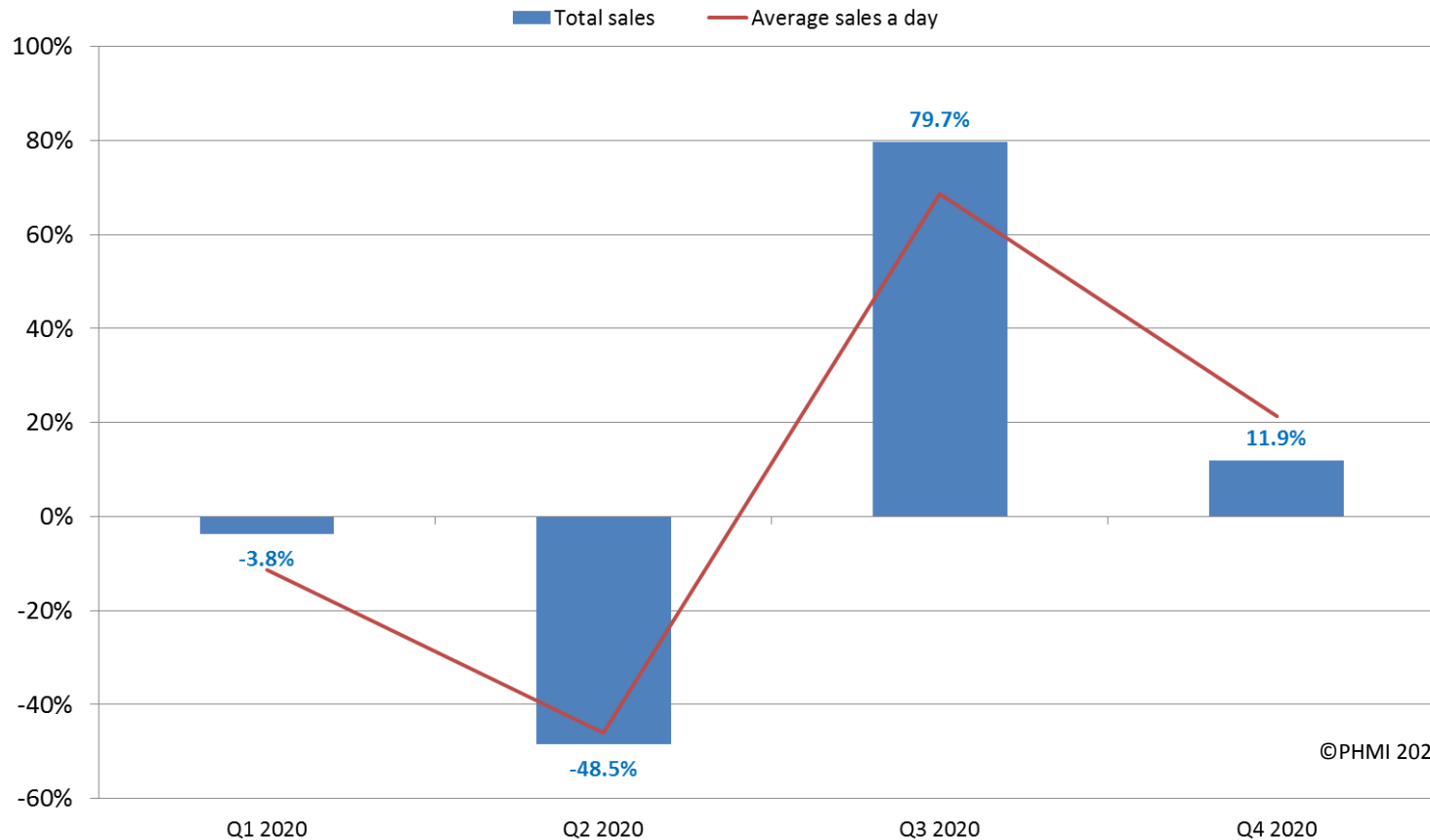
 Source: GfK's
Plumbing & Heating
Point of Sale Tracking
Data, Jan 2019 to Dec 2020

*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											

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

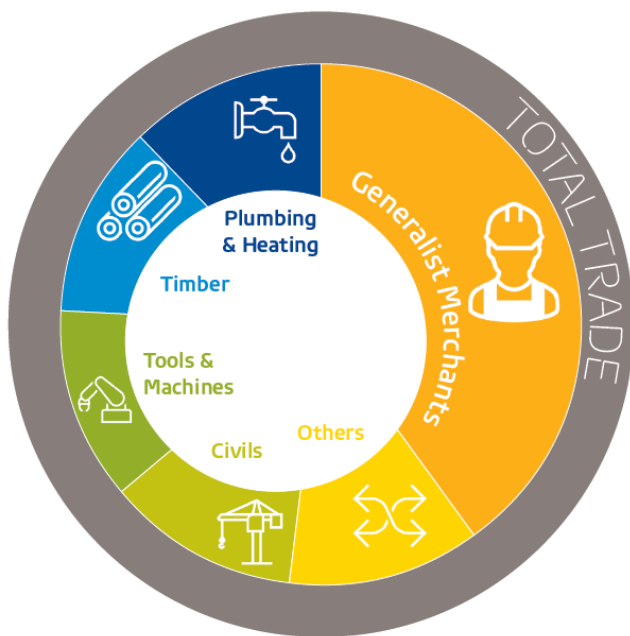
Full Year

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.

Plumbing & Heating channel definition and merchants

Plumbing & Heating Merchant Index



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 :



Tom Rigby

Commercial Manager

tom@mra-marketing.com

+44 (0) 7392 081276



Ralph Sutcliffe

Business Development
Director

ralph@mra-marketing.com

+44 (0) 1453 521621

More data available

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Emile van der Ryst

Senior Client Insight Manager -
Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615

Contact us

For further information



Neil Frackiewicz

Head of Retail UK

Neil.frackiewicz@gfk.com

+44 (0) 20 7890 9123



Emile van der Ryst

Senior Client Insight Manager - Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615



Nyssa Patel

Industry Analyst / Economist

nyssa.patel@bmf.org.uk

+44 (0) 24 7685 4994



Tom Rigby

Commercial Manager

tom@mra-marketing.com

+44 (0) 7392 081276



Ralph Sutcliffe

Business Development Director

ralph@mra-marketing.com

+44 (0) 1453 521621