

“building **excellence**  
in materials supply”

# Plumbing & Heating Merchant Index



**July 2021**

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**A Builders Merchant Building Index Publication**

# Building the Industry & Building Brands from Knowledge

Plumbing & Heating  
Merchant Index



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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

## Plumbing & Heating Merchant Index



### July sales-a-day up 23.6% on July 2020 on like-for-like basis, and up 9% on July 2019

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 12.8% in July 2021 compared to July 2020 (see [page 8](#)), with two less trading days this year. Like-for-like, average sales a day, which take trading day differences into account, were 23.6% higher. Compared with two years ago, absolute sales values in July 2021 were slightly down (-0.5%) but with two less trading days this year, average sales a day were 9.0% higher than in July 2019 ([page 9](#)).

Total value sales in July were 0.5% higher than in June, with one less trading day this month ([page 10](#)). Average sales a day were 5.2% higher.

July's PHMI Index, which contrasts sales with the base period of January to December 2019, was 99.6 – see the table on [page 6](#) and the chart on [page 7](#). The PHMI Index was slightly lower (98.7) in the last three months (May to July).

Sales in the three months May to July 2021 were 42.6% higher compared with the Covid-affected same three months last year, with two less trading days this year and a fully opened market ([page 11](#)). Average sales a day were 47.2% higher.

Sales in May to July 2021 were up 2.3% on the same three months in 2019, with two less trading days this year. Average sales a day increased by 5.6%.

Comparing the three months May to July 2021 with the previous 3 months (February to April) sales were 8.1% lower, with one less trading day in the most recent period ([page 12](#)). Average sales a day were down 6.6%.

Sales in the first seven months of 2021 were 32.5% higher than in January to July 2020, with three less trading days this year ([page 16](#)). Average sales a day were 35.2% higher.

Looking back two years, sales in the first seven months of 2021 were 3.1% ahead of January to July 2019, with two less trading days this year. Average sales a day increased by 4.6% ([page 17](#)).

Plumbing & Heating Merchants' sales in the 12 months August 2020 to July 2021 were 16.4% higher than in the same period a year earlier, with two less trading days in the most recent period ([page 18](#)). Average sales a day grew by 17.3%.

Total plumbing and heating value sales, from over 80% of Plumbing & Heating merchants throughout Great Britain, were up 12.8% in July 2021 compared with July 2020 – and up 23.6% on like-for-like sales a day basis.

# Indices: Monthly and quarterly

August 2020 to July 2021

(Indexed on January to December 2019)

Plumbing & Heating  
Merchant Index



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
Feb 21	Mar 21	Apr 21	Three months
102.4	118.2	101.8	107.5
May 21	Jun 21	Jul 21	Three months
97.4	99.2	99.6	98.7

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. July's Index of 99.6 means turnover was 0.4% lower than the base period.

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

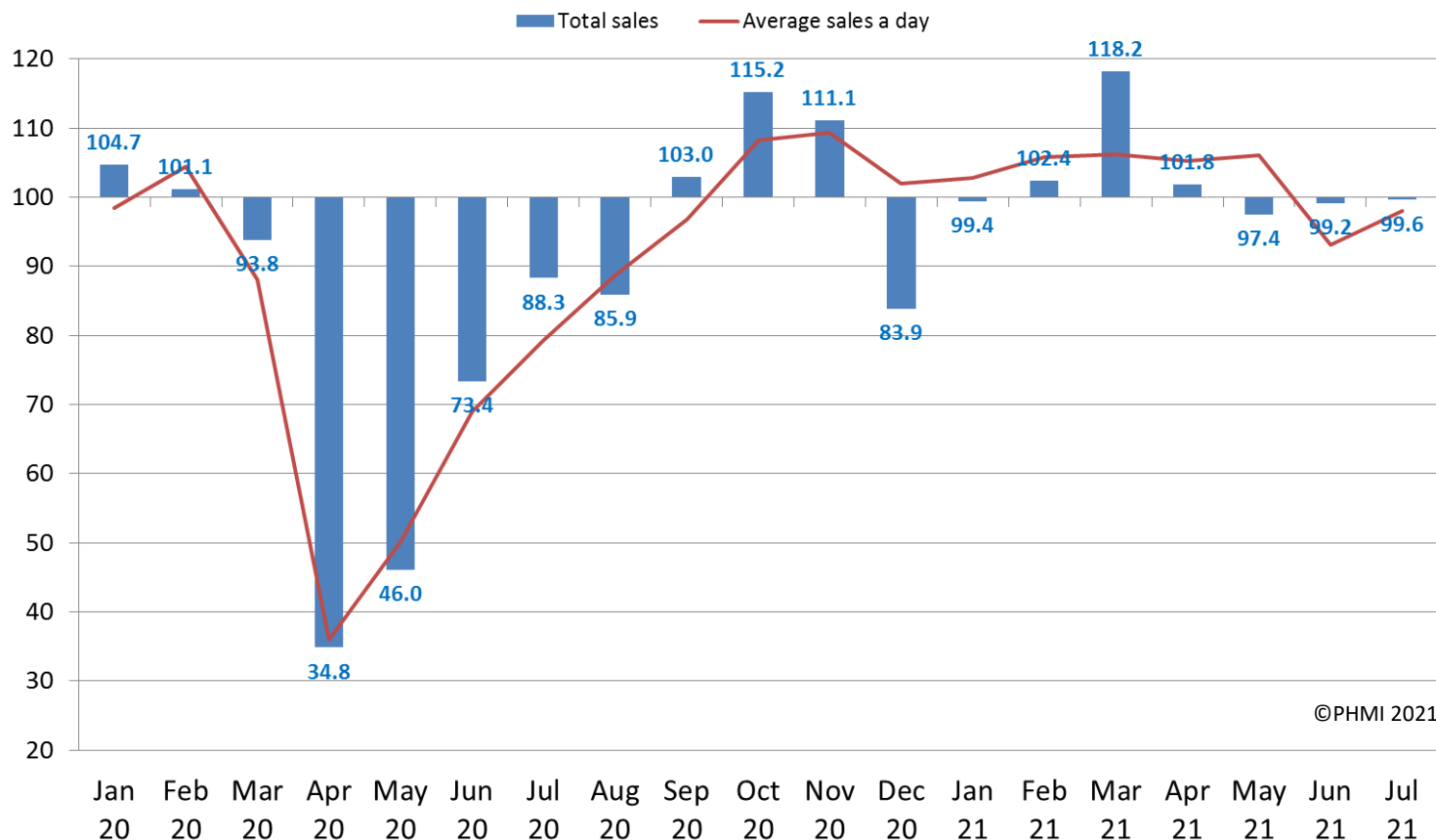
# Monthly: Index

Adjusted and unadjusted for trading days\*

Plumbing & Heating  
Merchant Index



## Indices: January 2020 to July 2021



\*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 July 2021

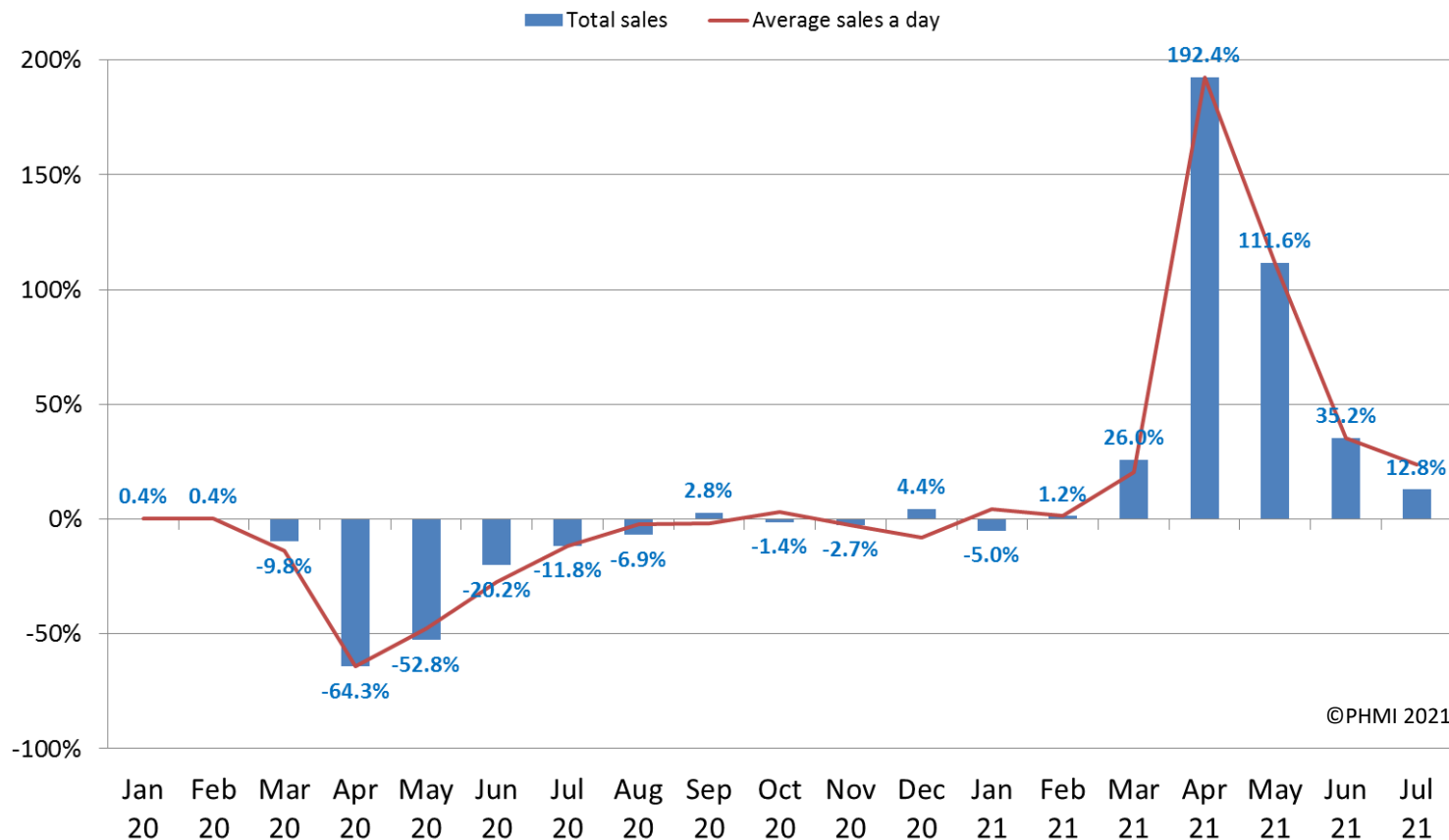
# Monthly: This Year v Last Year

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index



## Month: year on year



Values shown  
for Total sales

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

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

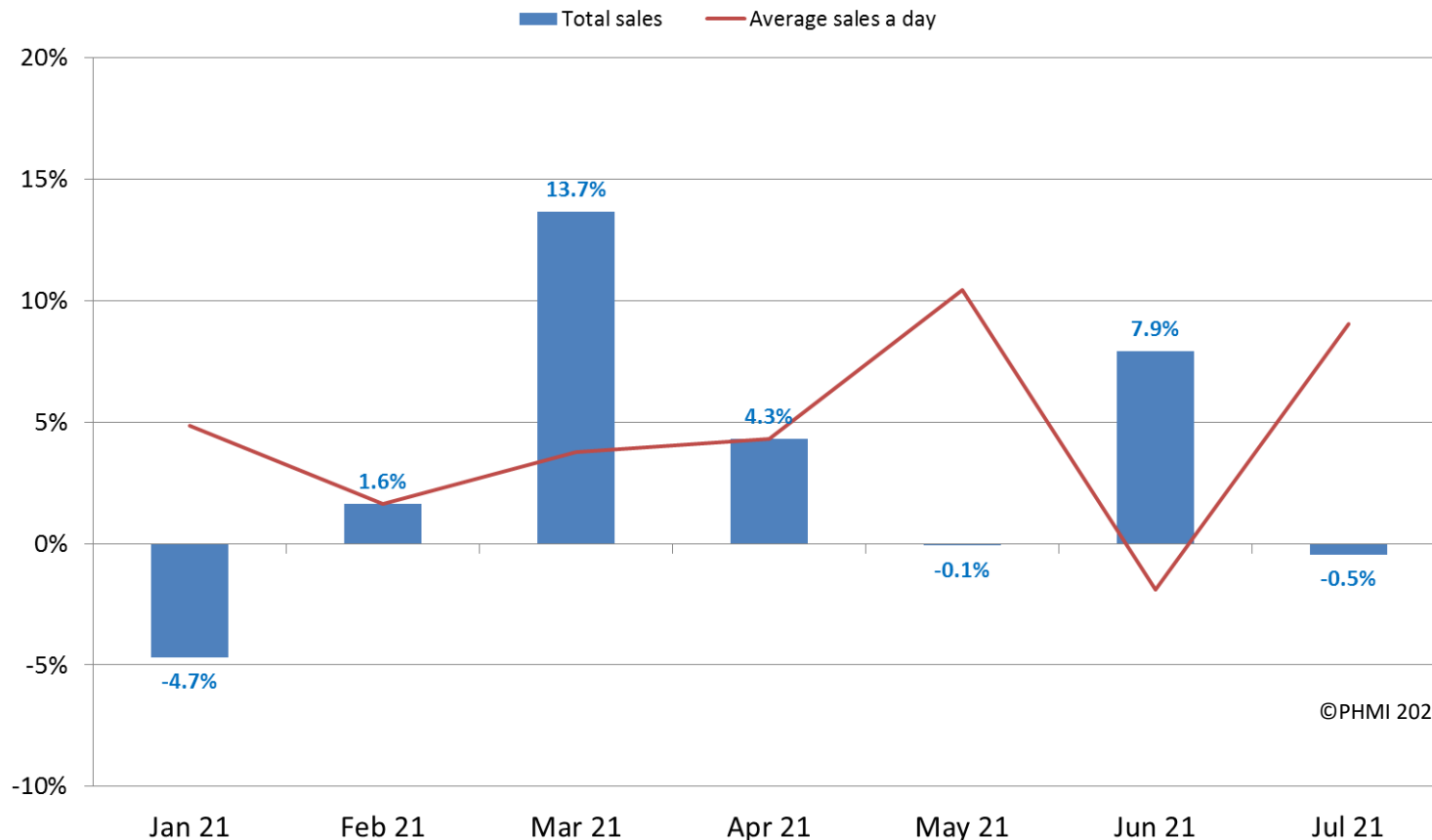


# Monthly: This Year v 2019

Sales indices, adjusted and unadjusted  
for trading days\*



## Month: compared with 2019



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

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

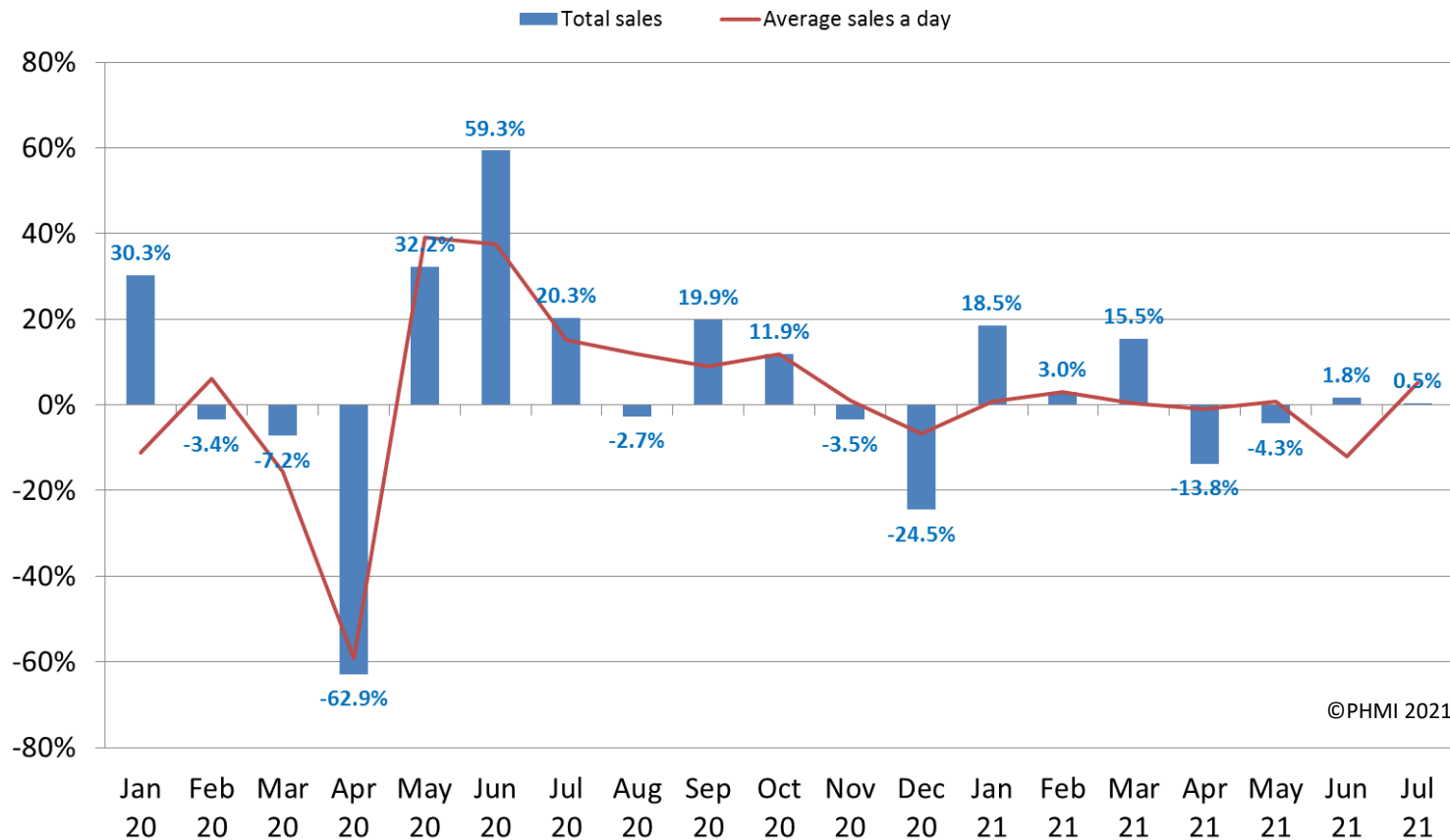
# Monthly: Month v previous month

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index



## Month v previous month



Values shown  
for Total sales

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

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

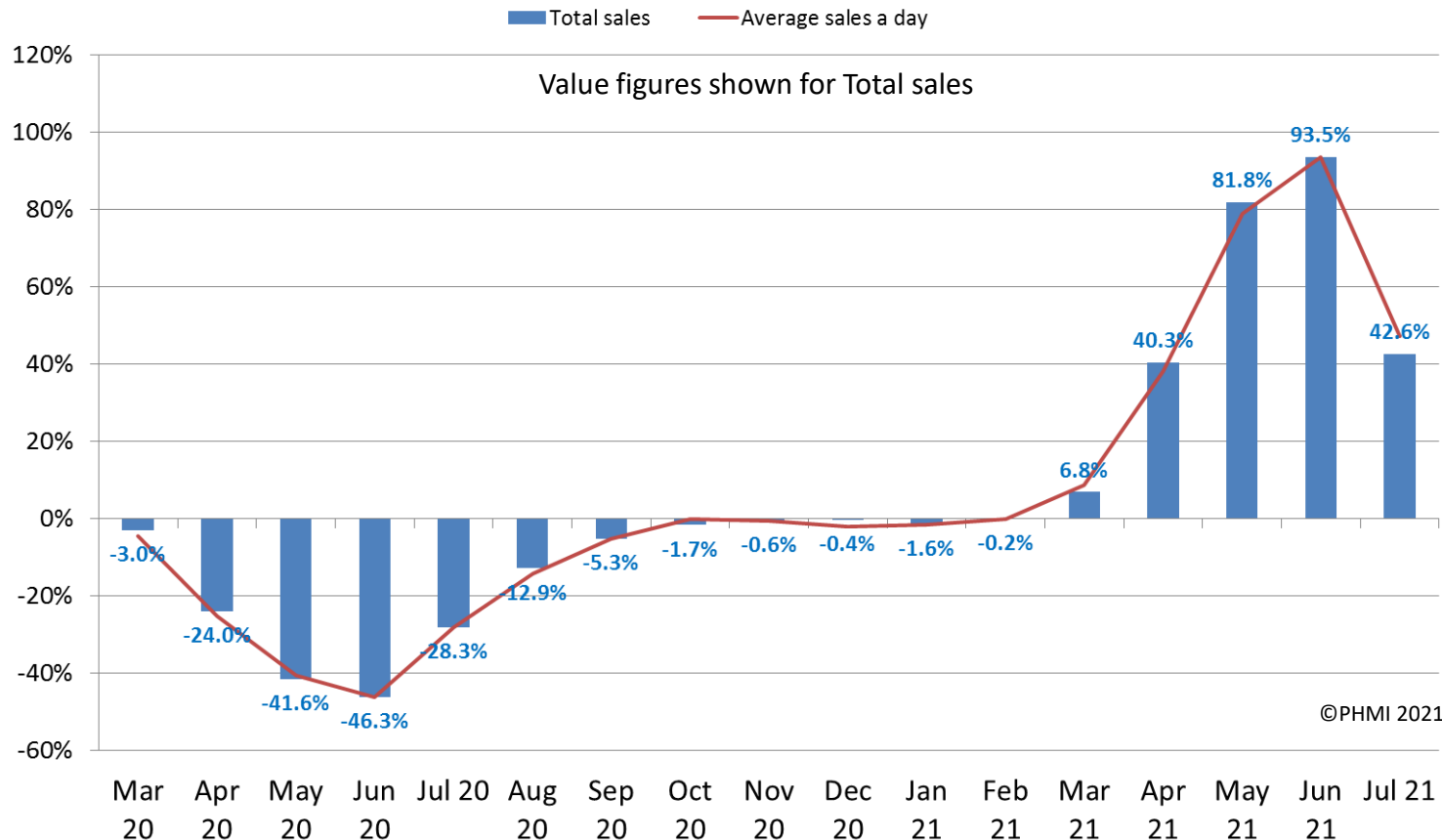
# Rolling 3-months: This year v last year

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index



## Rolling 3 months: year on year



Eg. July 21 shows sales in the three months May to July were 42.6% 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.

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

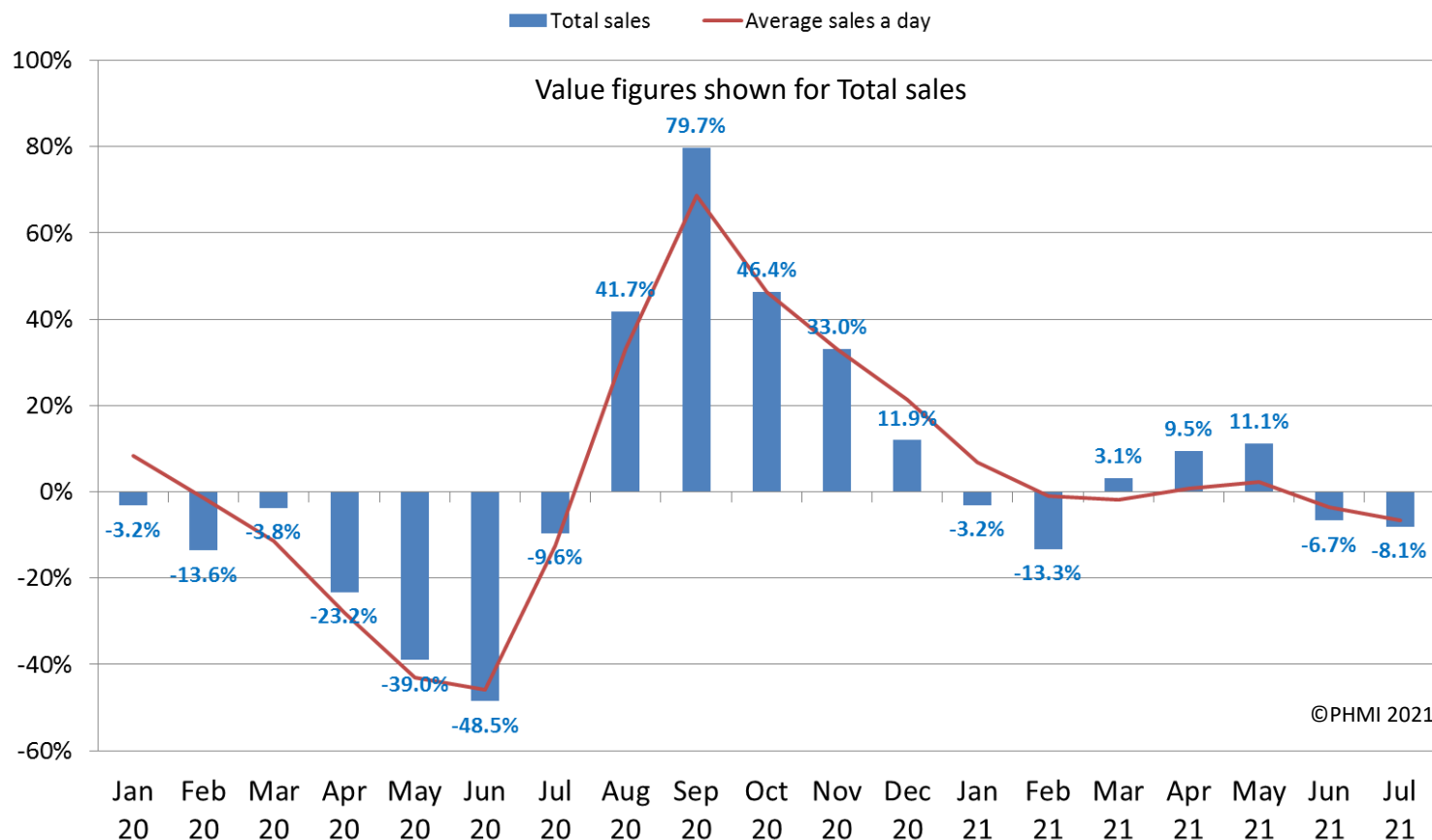
# Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index



## Rolling 3 months v previous 3 months



Eg. July 21 shows the three months May-July were 8.1% lower than the three months February to April

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

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

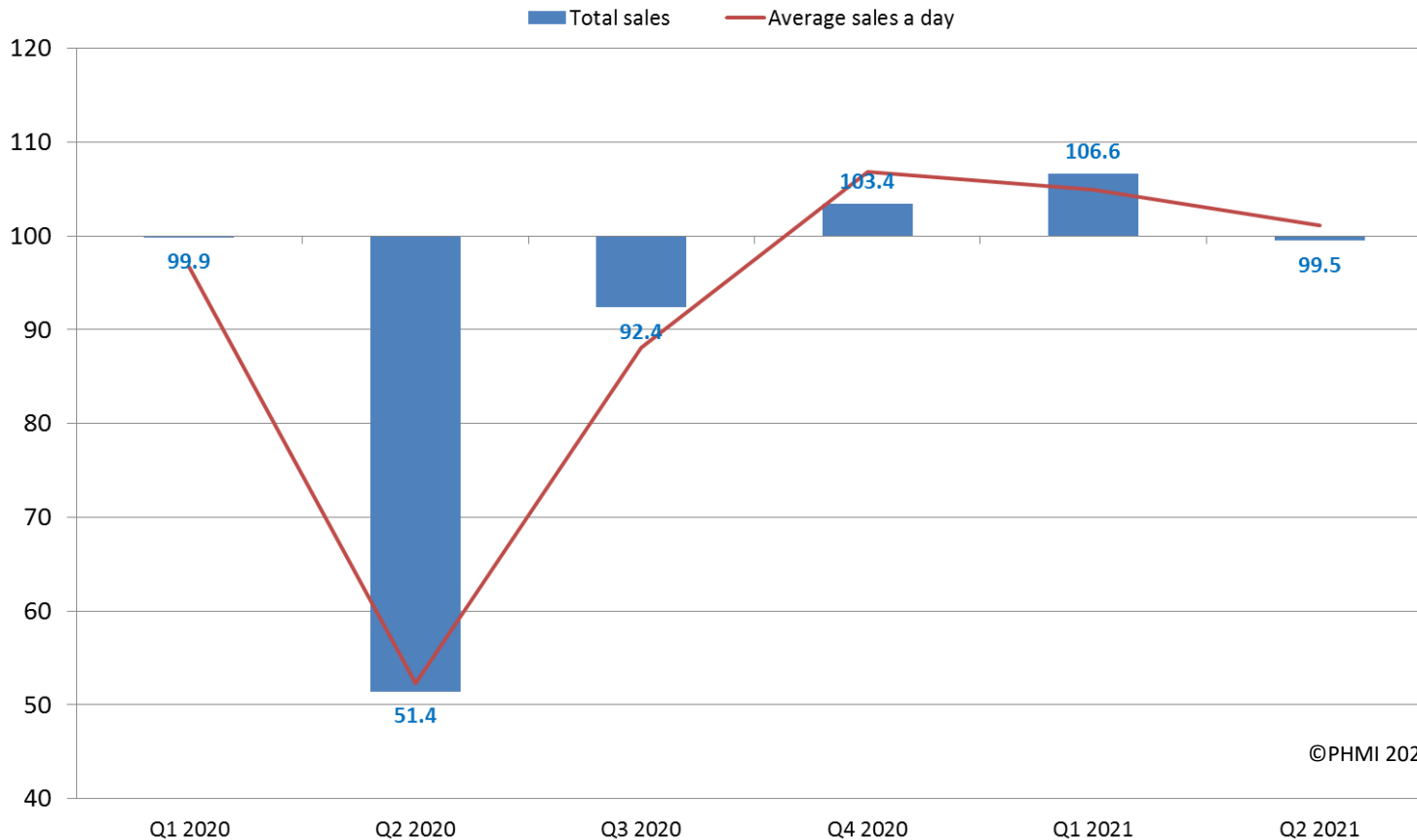
# Quarterly: Index

Adjusted and unadjusted for trading days

Plumbing & Heating  
Merchant Index



## Indices: Q1 2020 to Q2 2021



Value figures  
shown for Total  
sales

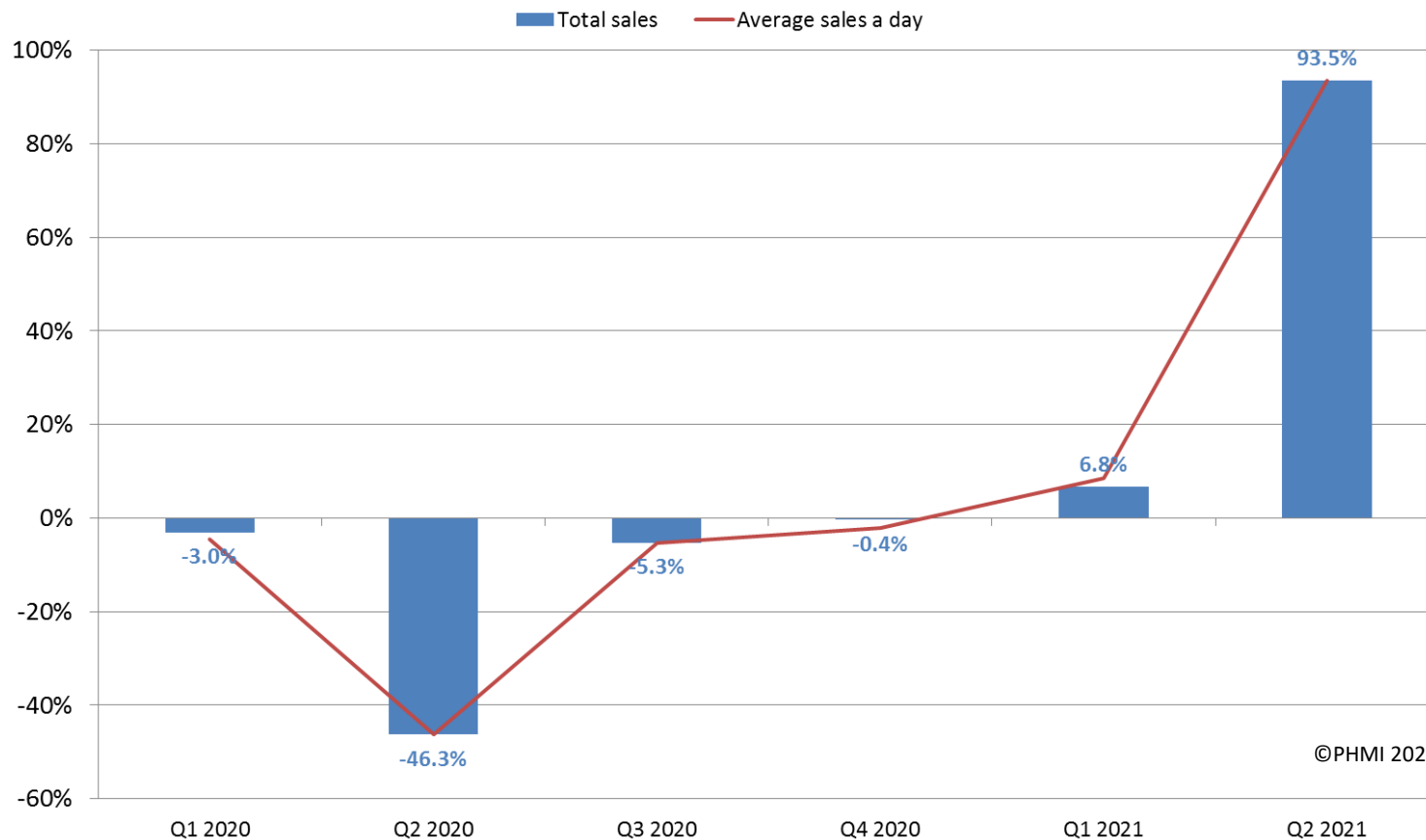
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**GfK** Source: GfK's  
Plumbing & Heating  
Point of Sale Tracking  
Data, Jan 2019 to Jun 2021

# Quarterly: Year on Year

Sales indices, adjusted and unadjusted  
for trading days\*

## Quarter: year on year



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 Jun 2021

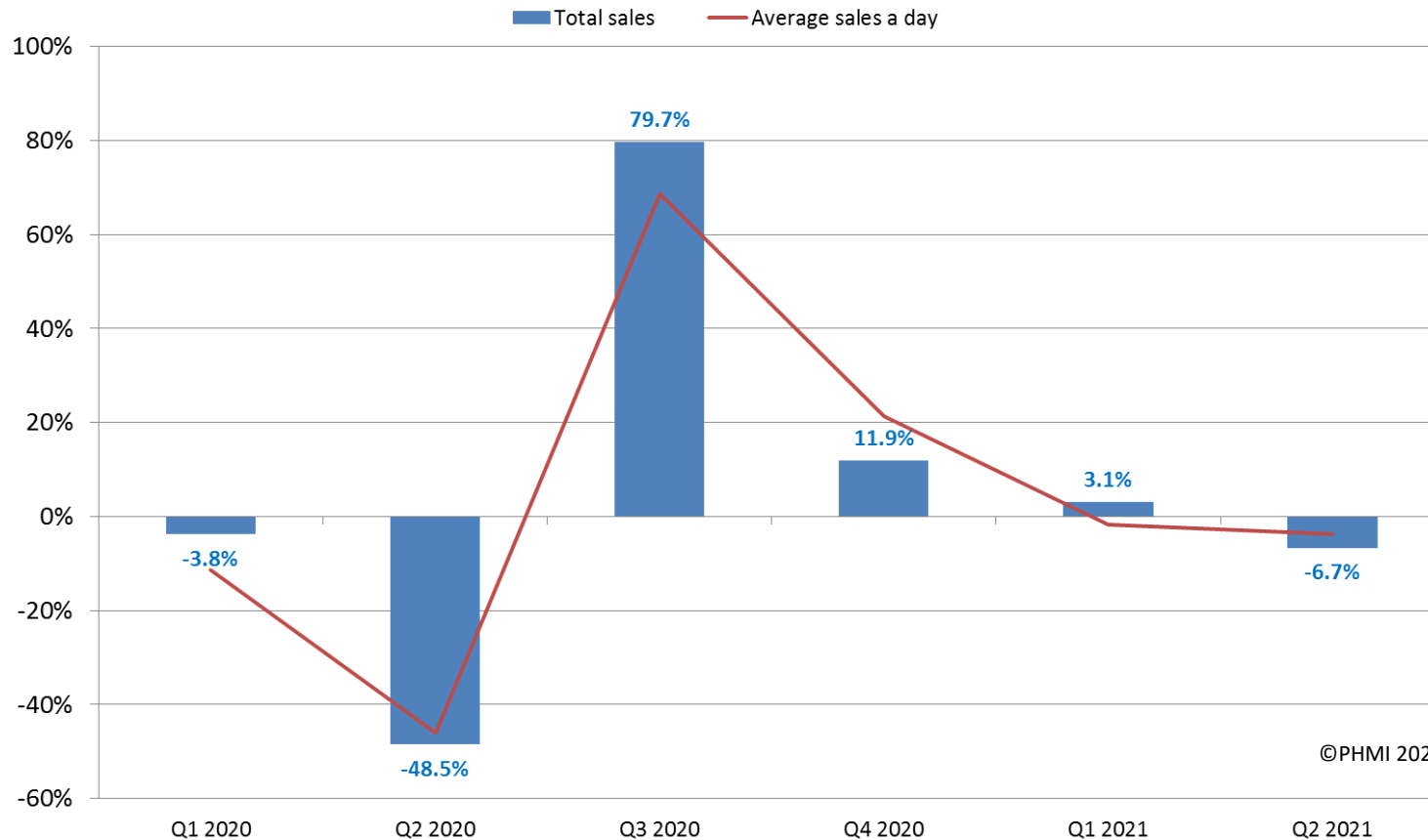
# Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index



## Quarter v previous quarter



Value figures  
shown for Total  
sales

©PHMI 2021

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

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

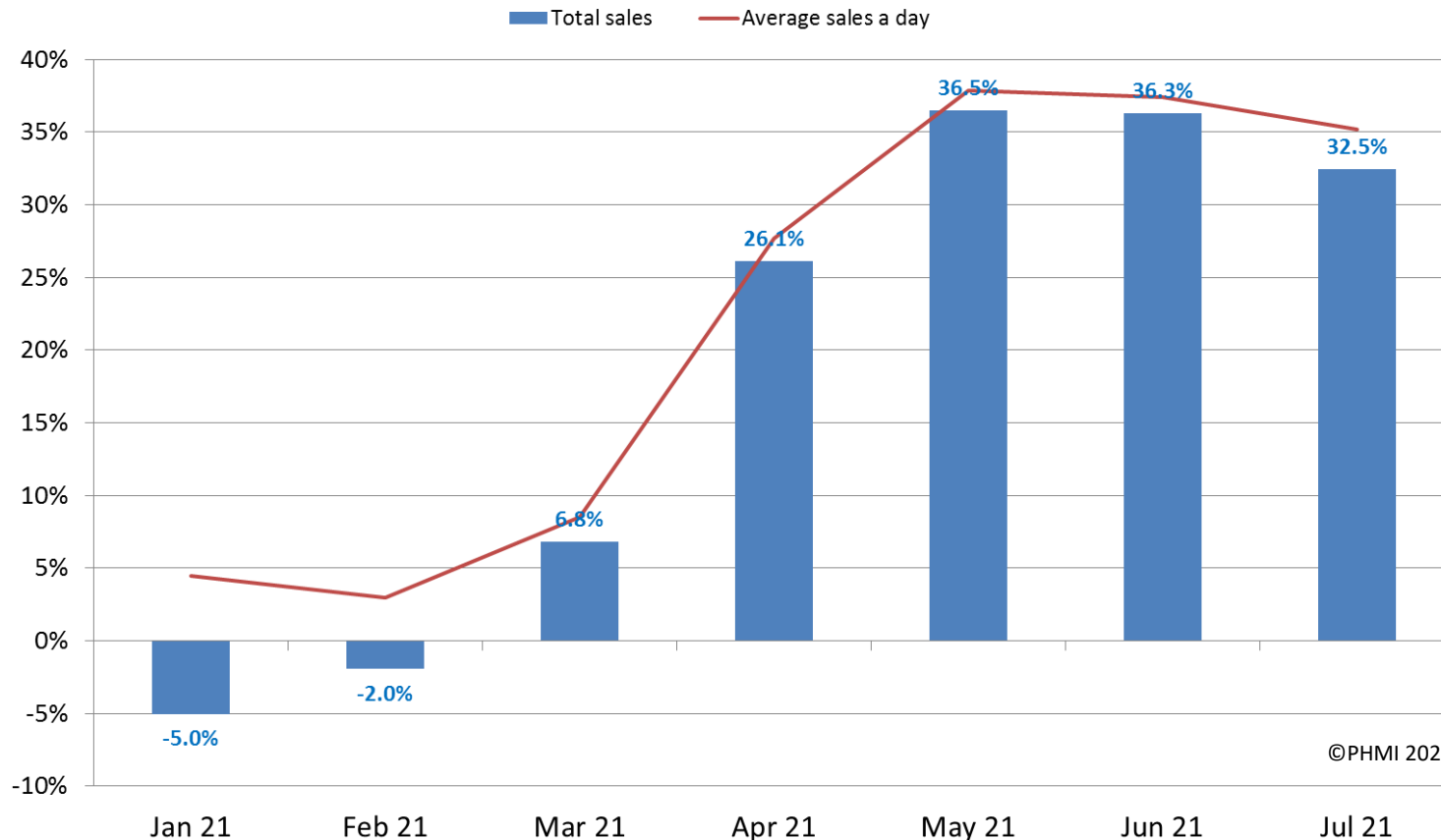
# Year To Date: Year on year

Last 7 months sales indices, adjusted and unadjusted for trading days\*

Plumbing & Heating  
Merchant Index



## Cumulative year to date: Jan 21 to Jul 21 v last year



Value figures  
shown for Total  
sales

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

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



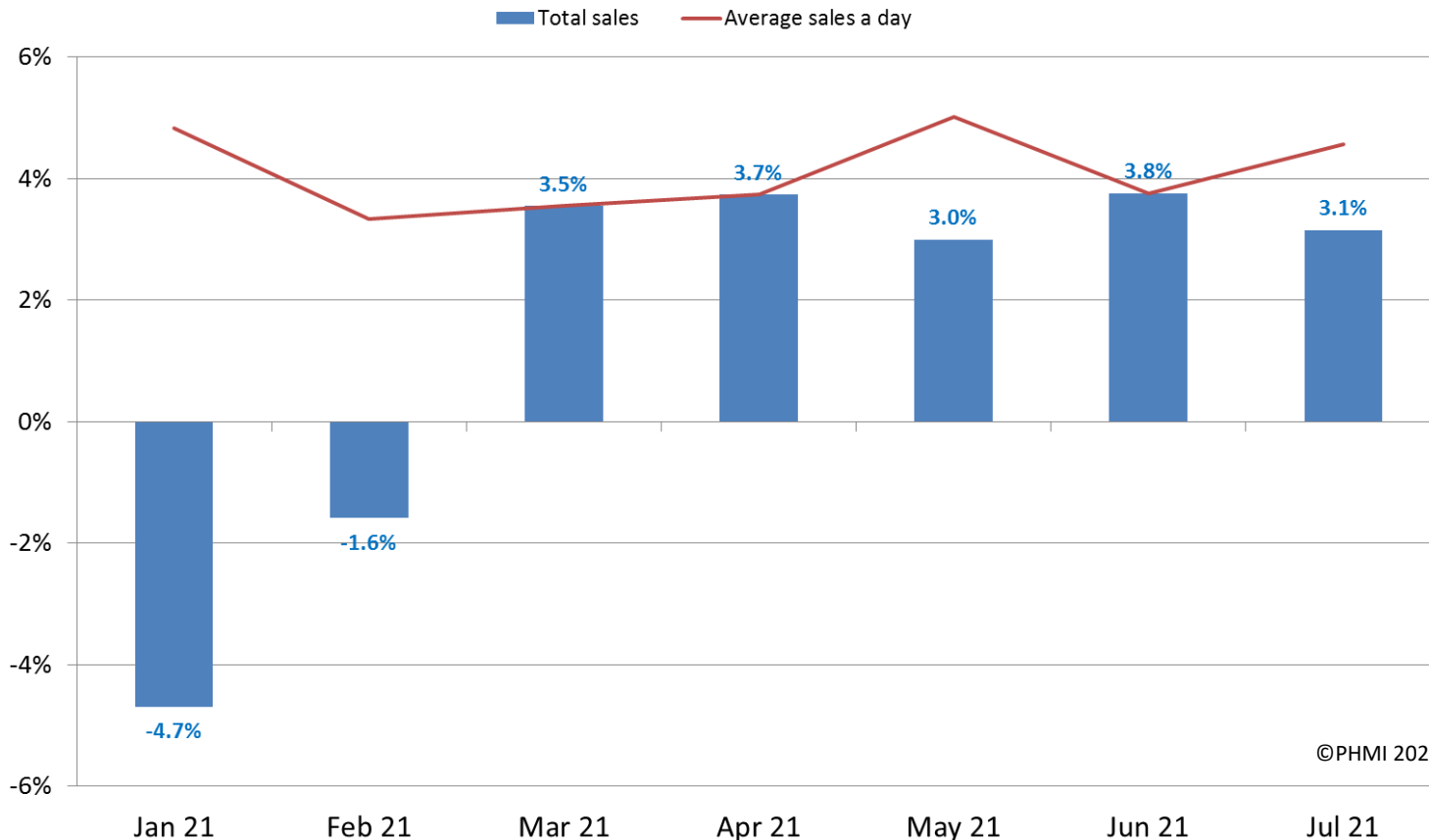
# Year To Date: 2021 v 2019

Last 7 months sales indices, adjusted and unadjusted for trading days

Plumbing & Heating  
Merchant Index



## Cumulative year to date: 2-year comparison



Value figures  
shown for Total  
sales

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

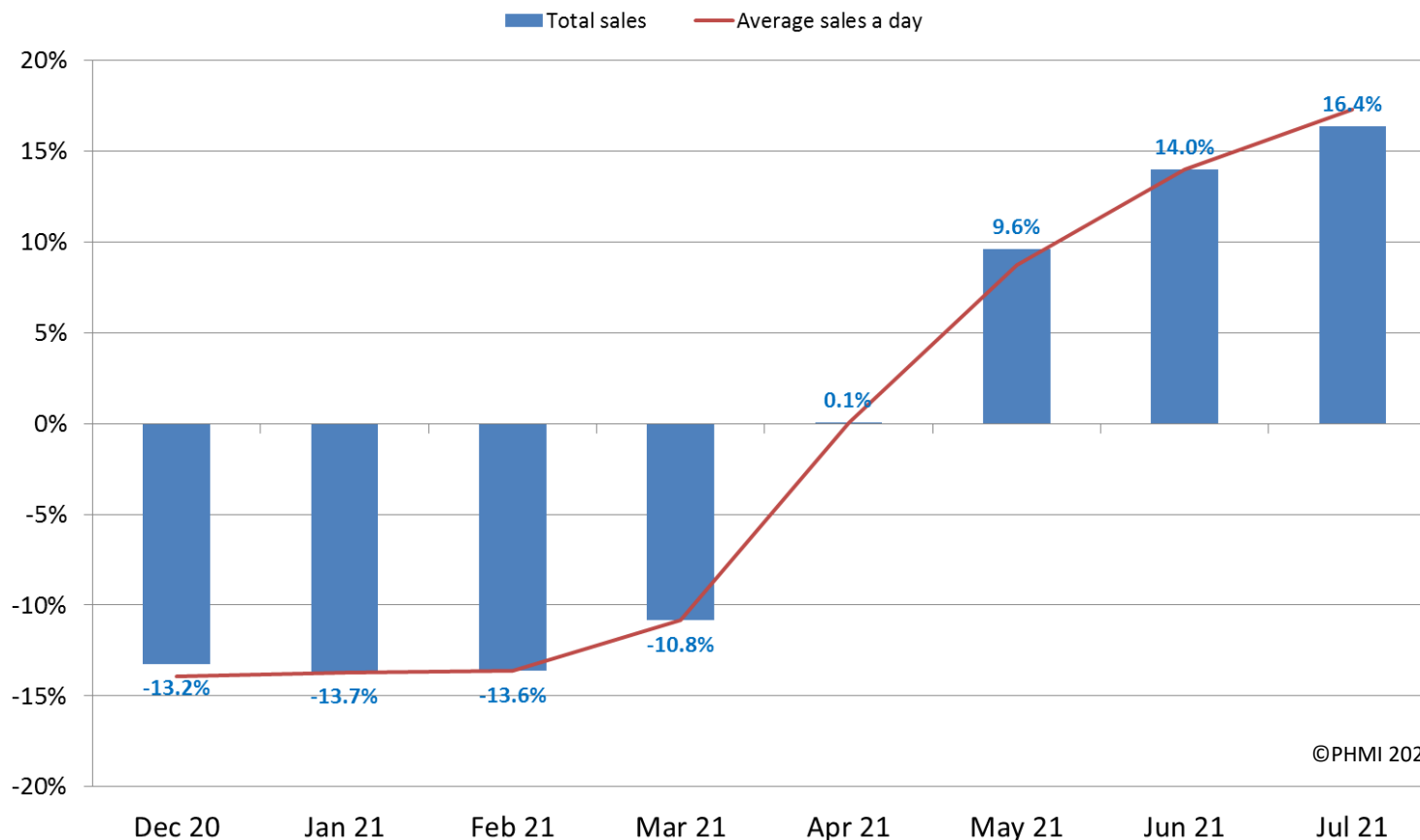
# Last 12 months: Year on year

Sales indices, adjusted and unadjusted  
for trading days\*

Plumbing & Heating  
Merchant Index



## Rolling 12 months v previous 12 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.

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

# PHMI Trading Days

## Monthly

Index: 20.8

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

## Quarterly

Index: 62.3

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

## Half Year

2020	
H1 125	H2 125
2021	
H1 124	H2

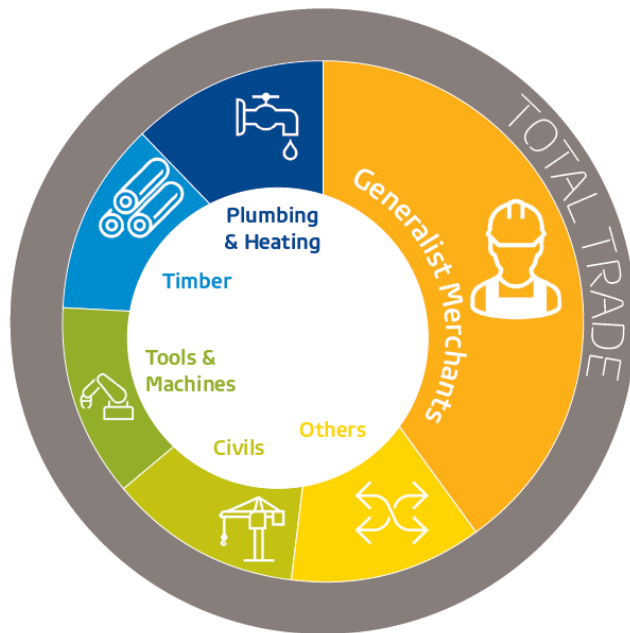
## Full Year

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:



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