

“building **excellence**
in materials supply”

Plumbing & Heating Merchant Index



Quarter 2 2021

(Published 23 August 2021)

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 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.

Overview and Insights

A positive second quarter compared to last year but minimal growth on Q2 2019

June 2021 plumbing and heating product sales, with data from over 80% of Plumbing & Heating merchants' sales, were up 35.2% on June 2020. (See [page 11](#)). However sales in June last year were hit by restrictions from Lockdown 1, making it difficult to assess how well the market has recovered. By also looking back two years, it is possible to compare sales against more normal trading conditions. Compared with June 2019, turnover in June 2021 was up 7.9%, helped by two more trading days this year. Average sales a day, which take trading day differences into account, were 1.9% lower than in June 2019 ([page 12](#)).

Value sales in June 2021 were 1.8% higher than in May 2021 ([page 14](#)), helped by three more trading days this month, but average sales a day in June were 12.1% lower compared with May.

Quarter 2 2021 sales were 93.5% higher than in Quarter 2 2020 ([page 8](#)) but this was against the almost total shutdown of the market in April 2020 and only gradual recovery in May and June. Looking back two years, sales in the second quarter of 2021 were 4.0% higher than the same period in 2019.

Sales in Quarter 2 were 6.7% lower than in Quarter 1 ([page 9](#)). However there were two less trading days in the most recent quarter and taking these into account, average sales a day were 3.7% lower than in Q1.

Focussing on the first six months of 2021, sales were up 36.3% compared to January to June 2020, with one less trading day this year. Average sales a day were 37.4% higher ([page 16](#)). Compared with the same period in 2019, sales in the first six months of 2021 were 3.8% higher, with no difference in trading days ([page 17](#)).

The rolling 12 months July 2020 to June 2021 were 14.0% up compared with July 2019 to June 2020 ([page 18](#)).

The PHMI Index for June 2021, which contrasts sales with the base period of January to December 2019, was 99.2, helped by one more trading day – see the table on [page 6](#) and the chart on [page 10](#). The table on [page 6](#) and chart on [page 7](#) show the PHMI Index for Quarter 2 2021 was almost identical, at 99.5, with one less trading day.

June 2021 plumbing and heating product sales, representing data from over 80% of Plumbing & Heating merchants' sales, were up 35.2% on June 2020.

Indices: Monthly and quarterly

July 2020 to June 2021

(Indexed on January to December 2019)

Plumbing & Heating
Merchant Index



Jul 20	Aug 20	Sep 20	Three months
88.3	85.9	103.0	92.4
Oct 20	Nov 20	Dec 20	Three months
115.2	111.1	83.9	103.4
Jan 21	Feb 21	Mar 21	Three months
99.4	102.4	118.2	106.6
Apr 21	May 21	Jun 21	Three months
101.8	97.4	99.2	99.5

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, March's index of 118.2 means turnover was 18.2% above the base period.
- Values below 100 indicate lower turnover in that period. June's Index of 99.2 means turnover was 0.8% lower than the base period.



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

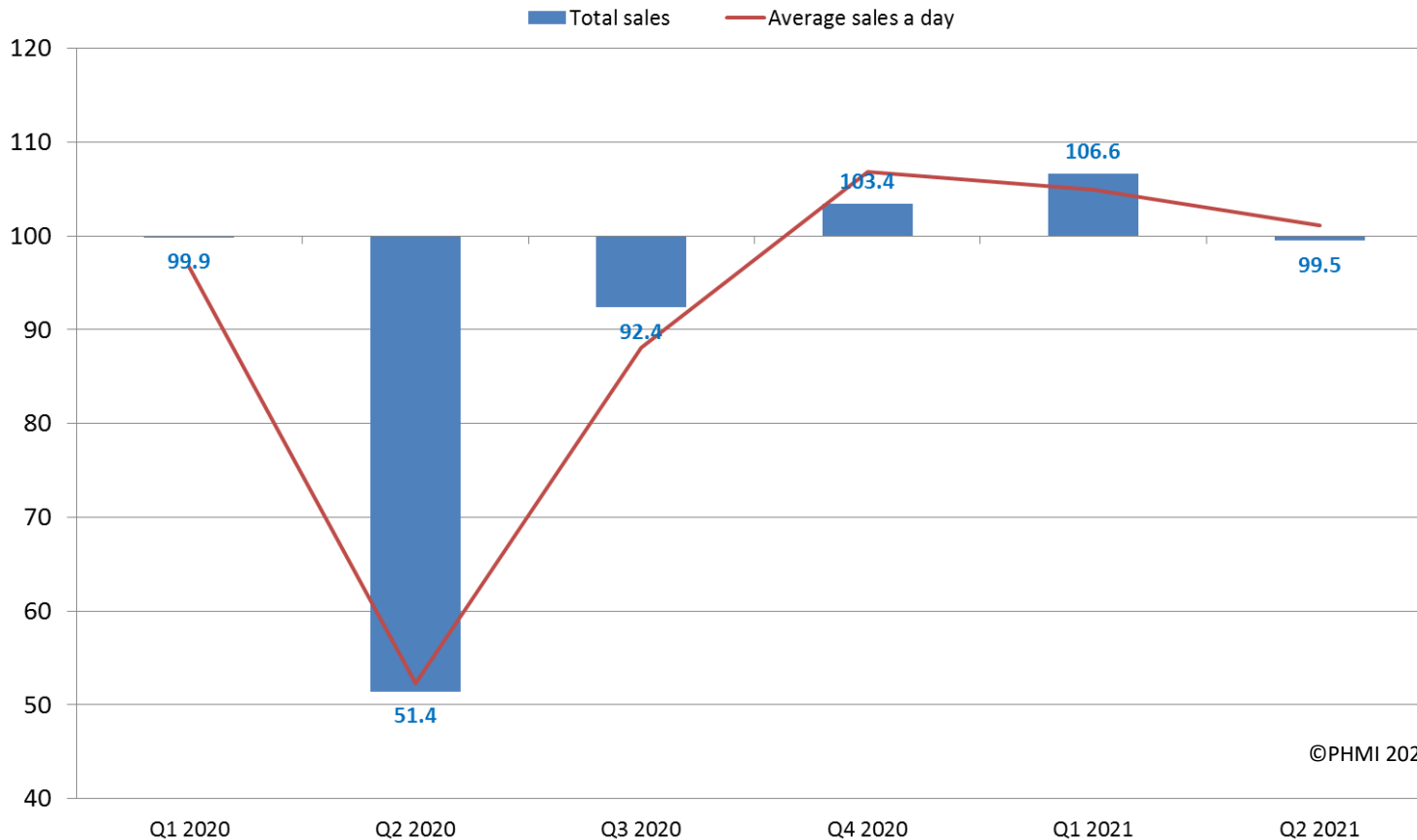
Quarterly: Index

Adjusted and unadjusted for trading days

Plumbing & Heating
Merchant Index



Indices: Q1 2020 to Q2 2021



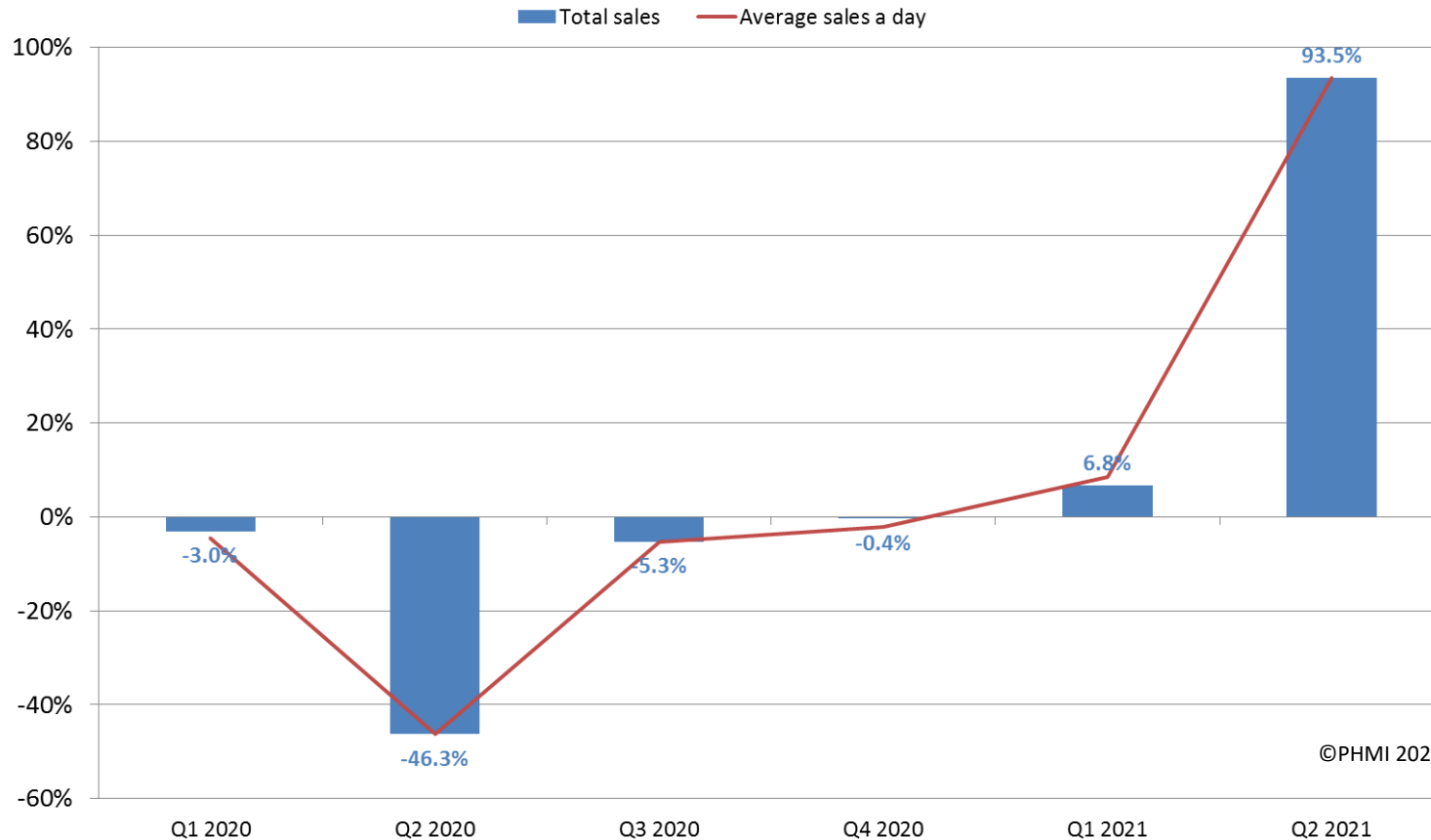
Value figures
shown for Total
sales

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

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*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

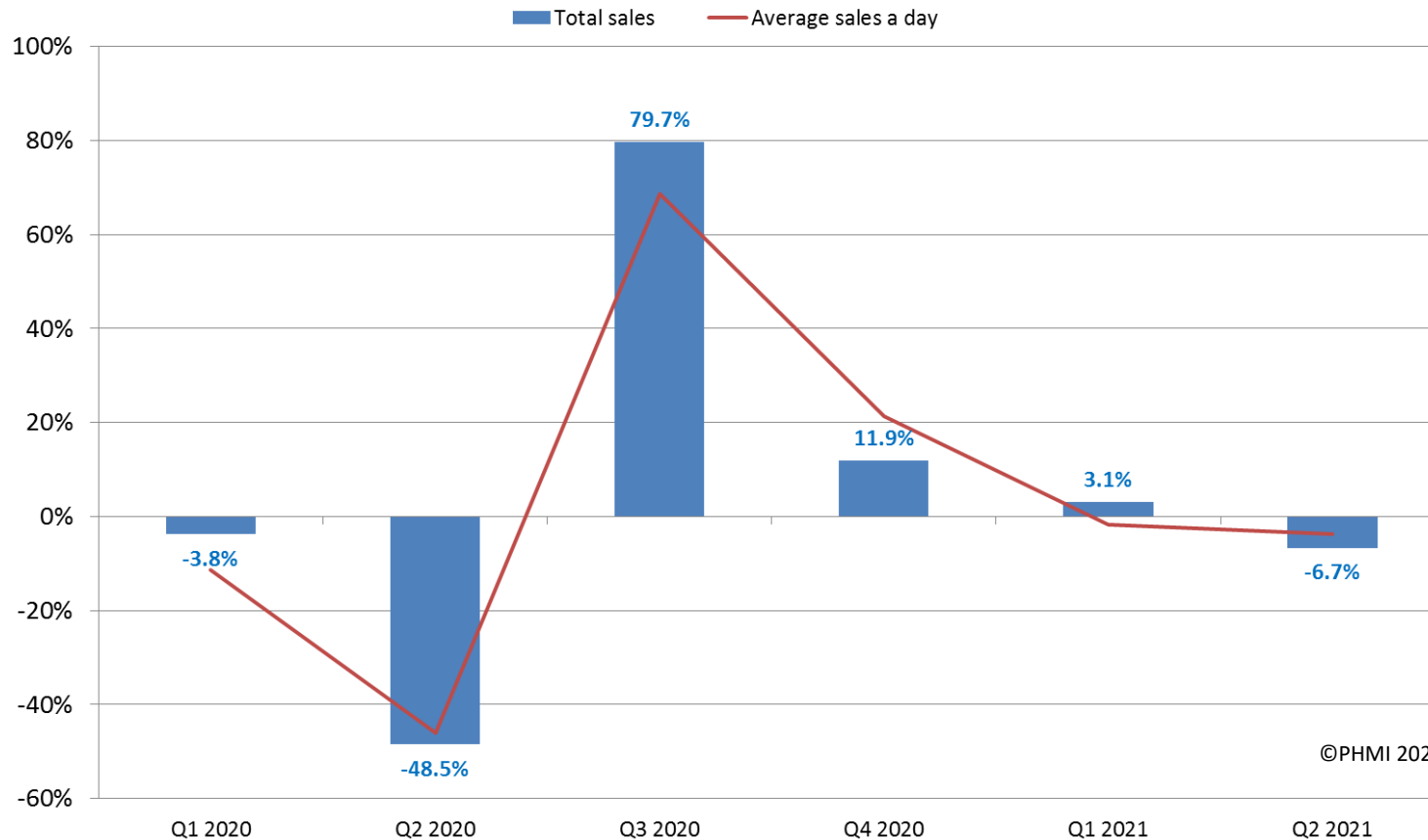
Quarterly: Quarter v previous quarter

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Quarter v previous quarter



Value figures
shown for Total
sales

*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

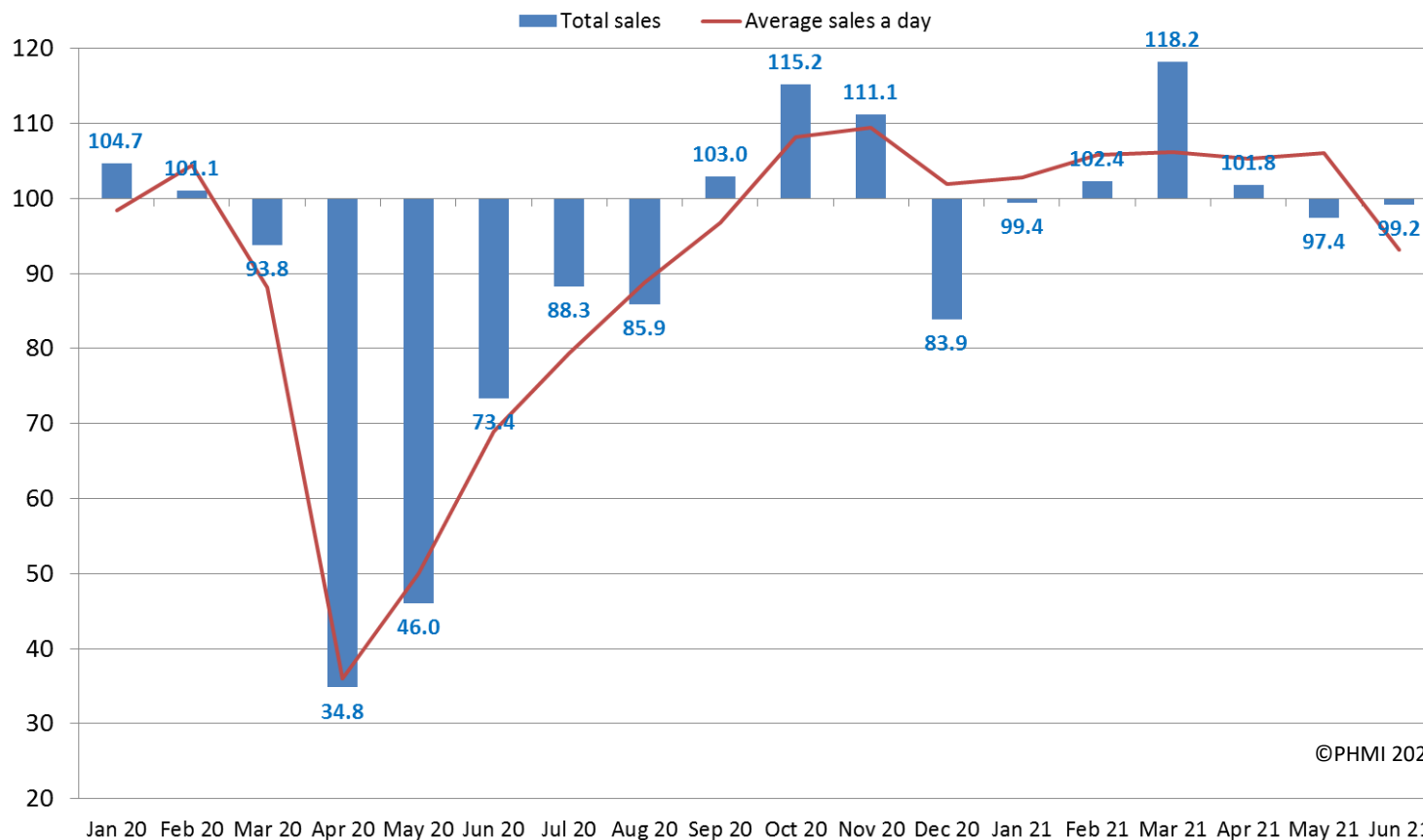
Monthly: Index

Adjusted and unadjusted for trading days*

Plumbing & Heating
Merchant Index



Indices: January 2020 to June 2021



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.

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

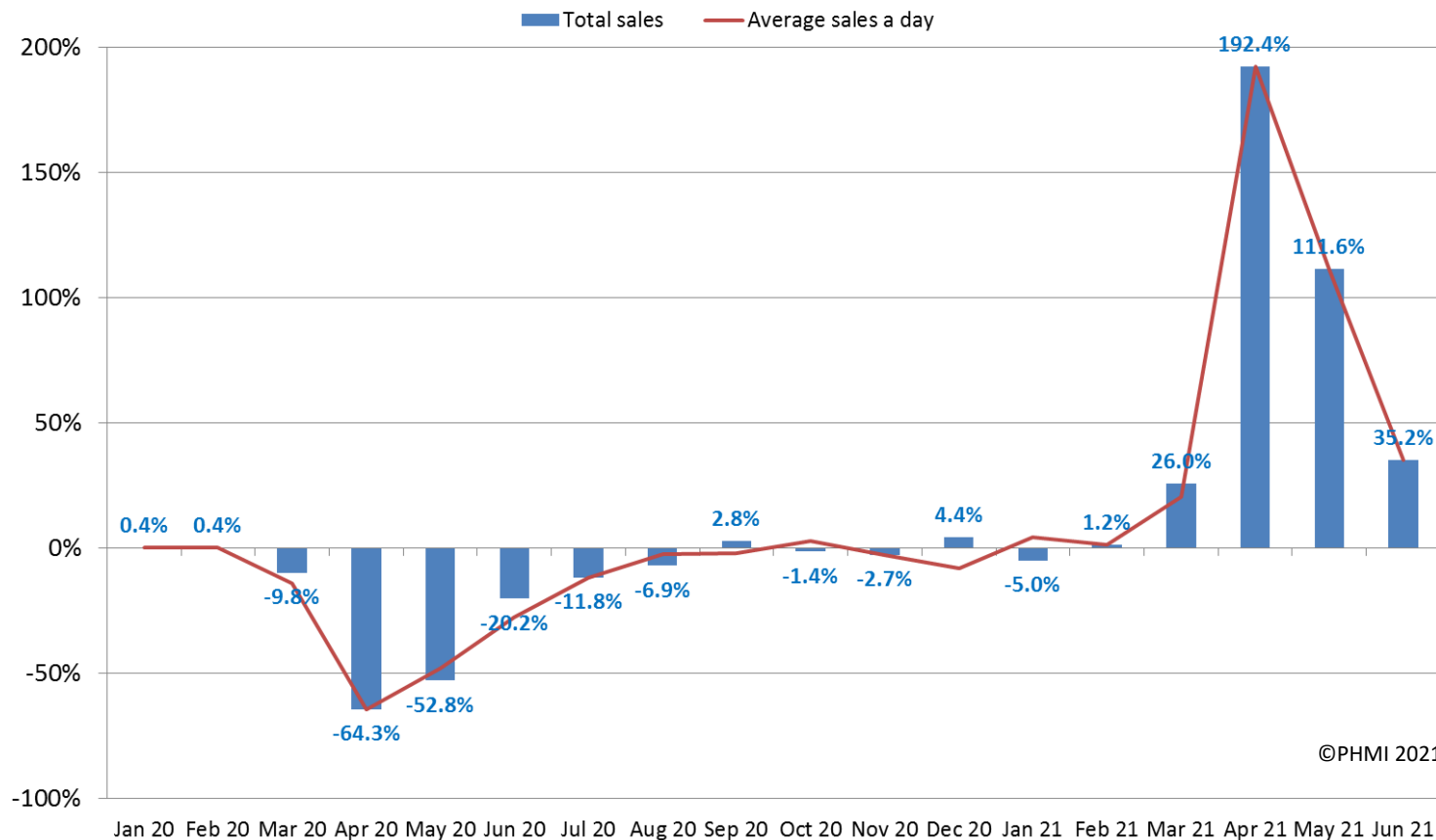
Monthly: Year on year

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Month: year on year



Value figures
shown for Total
sales

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

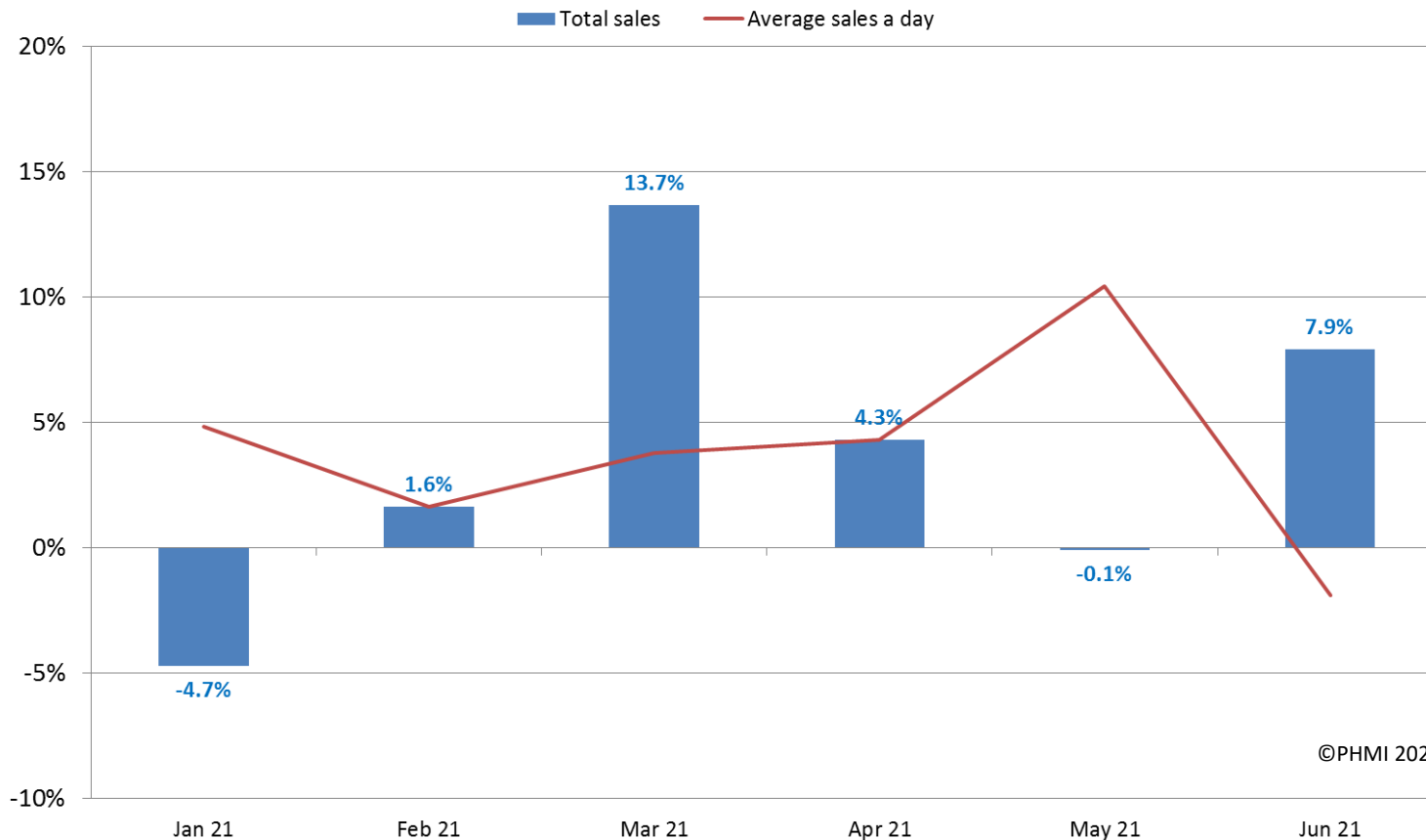
Monthly: 2021 v 2019

Sales indices, adjusted and unadjusted
for trading days

Plumbing & Heating
Merchant Index



Month: compared with 2019



Value figures
shown for Total
sales

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

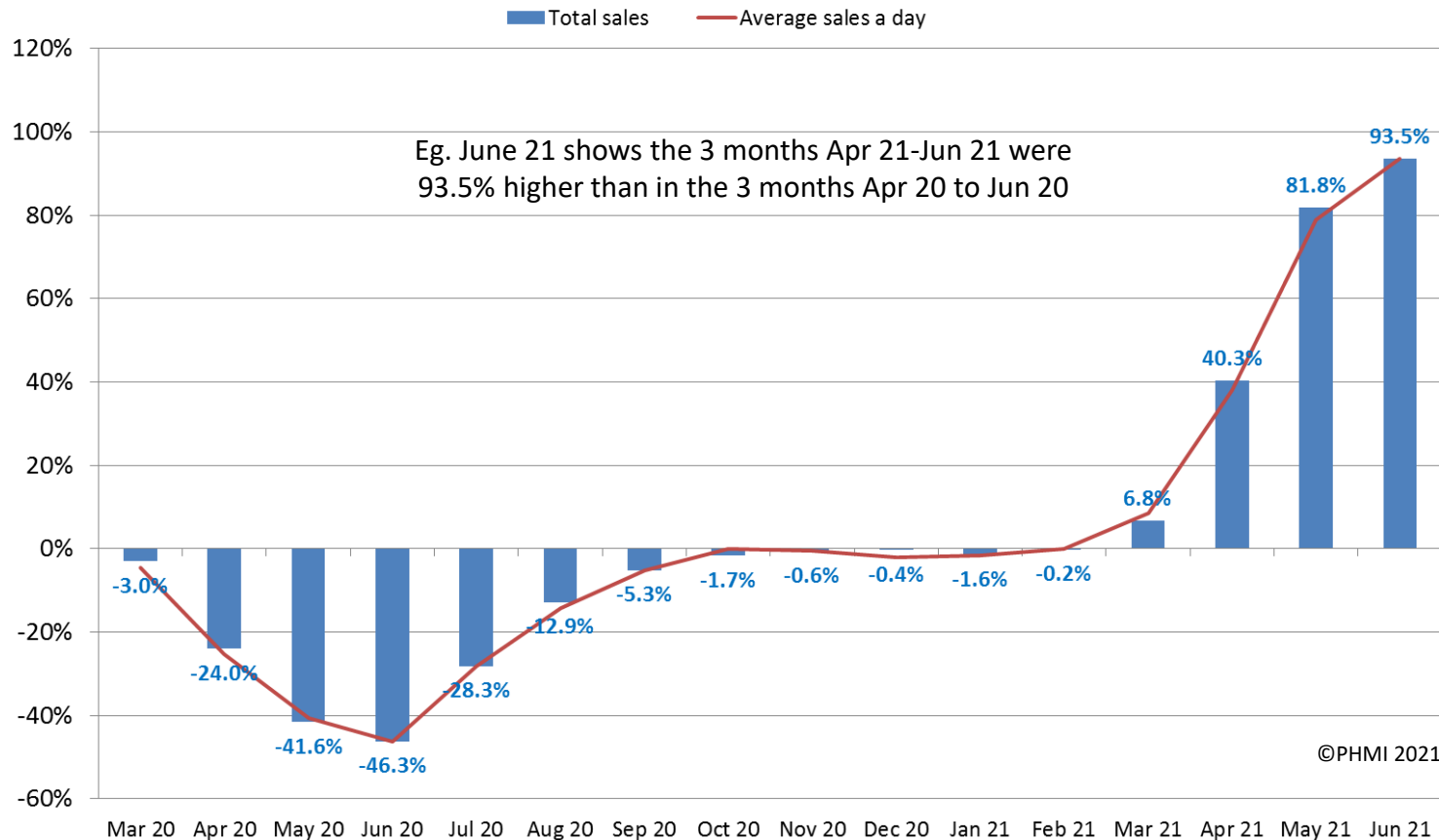
Rolling 3-months: Year on year

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Rolling 3 months: year on year



Value figures
shown for Total
sales

*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

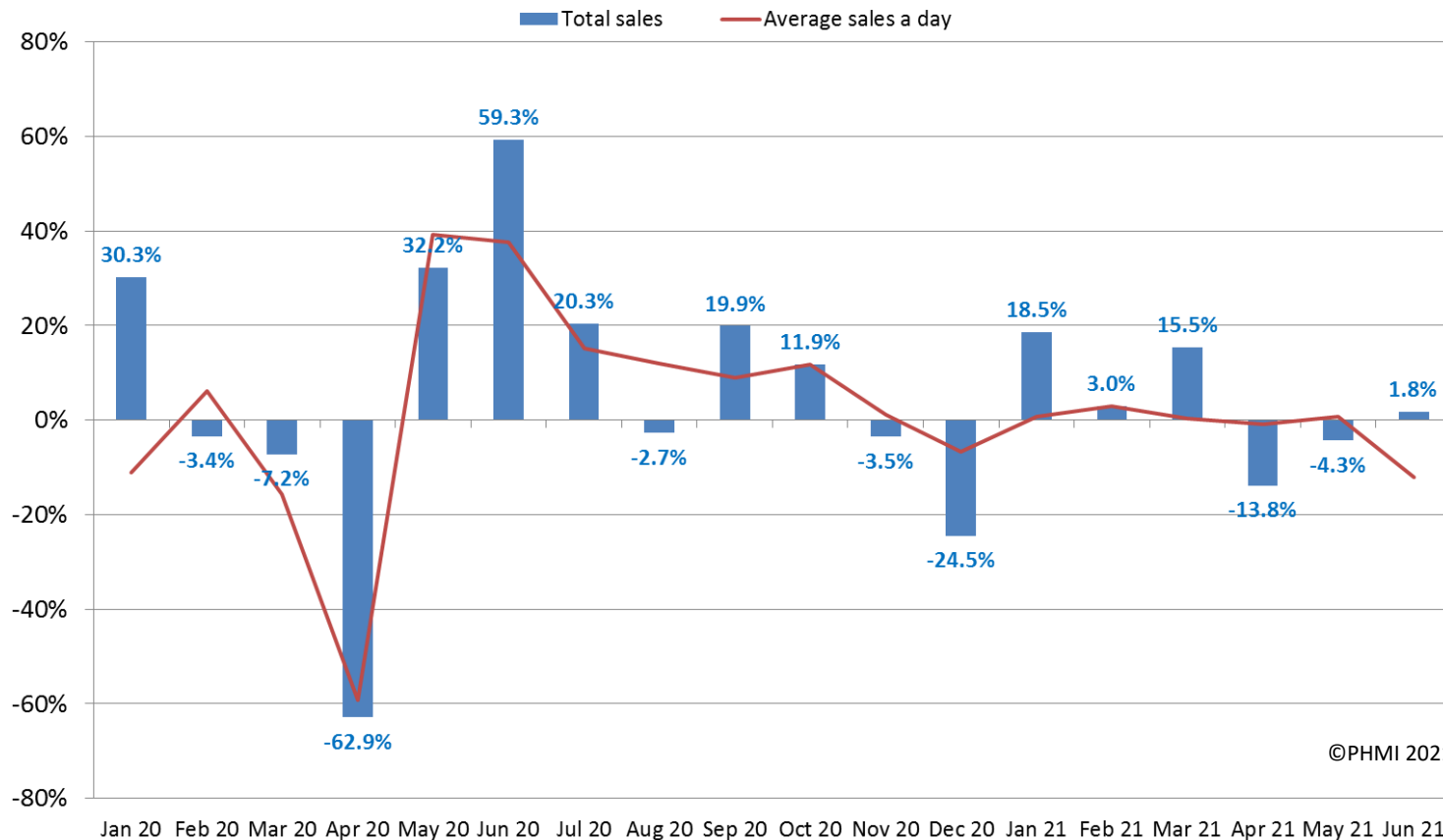
Monthly: Month v previous month

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Month v previous month



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 Jun 2021

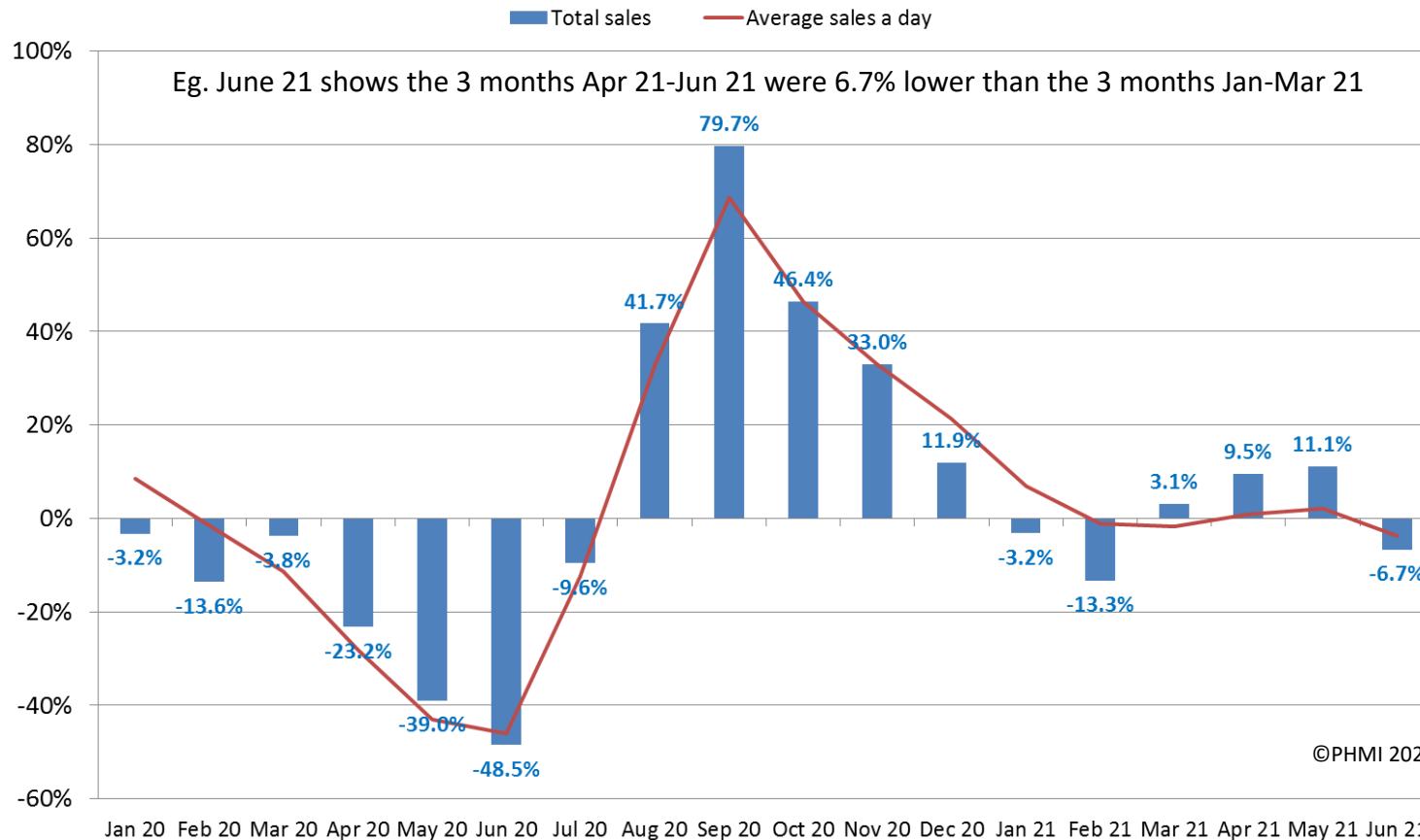
Rolling 3-months: v previous 3 months

Sales indices, adjusted and unadjusted
for trading days*

Plumbing & Heating
Merchant Index



Rolling 3 months v previous 3 months



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 Jun 2021

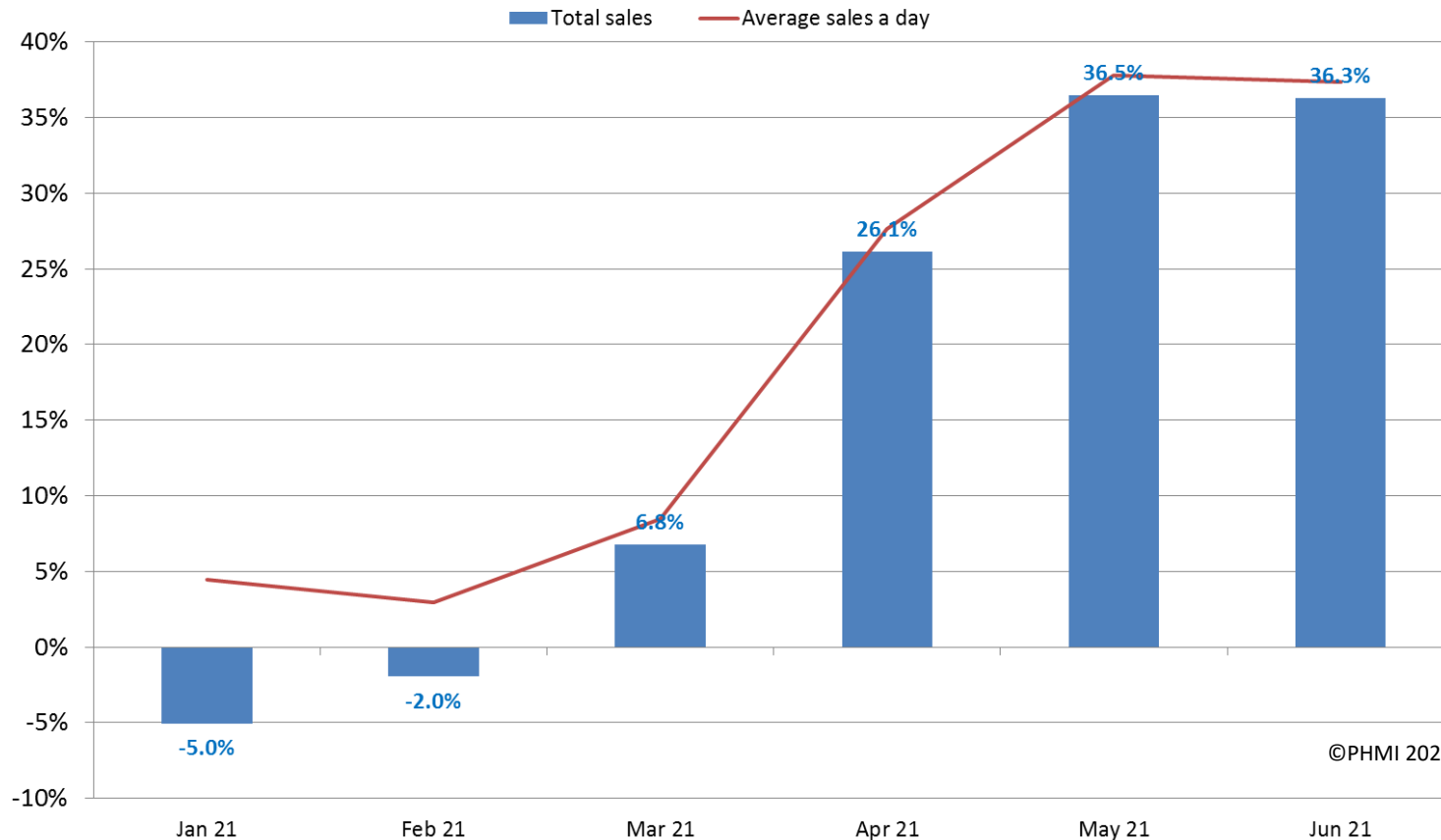
Year To Date: Year on year

Last 6 months sales indices, adjusted and unadjusted for trading days*

Plumbing & Heating
Merchant Index



Cumulative year to date: Jan 21 to Jun 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 Jun 2021

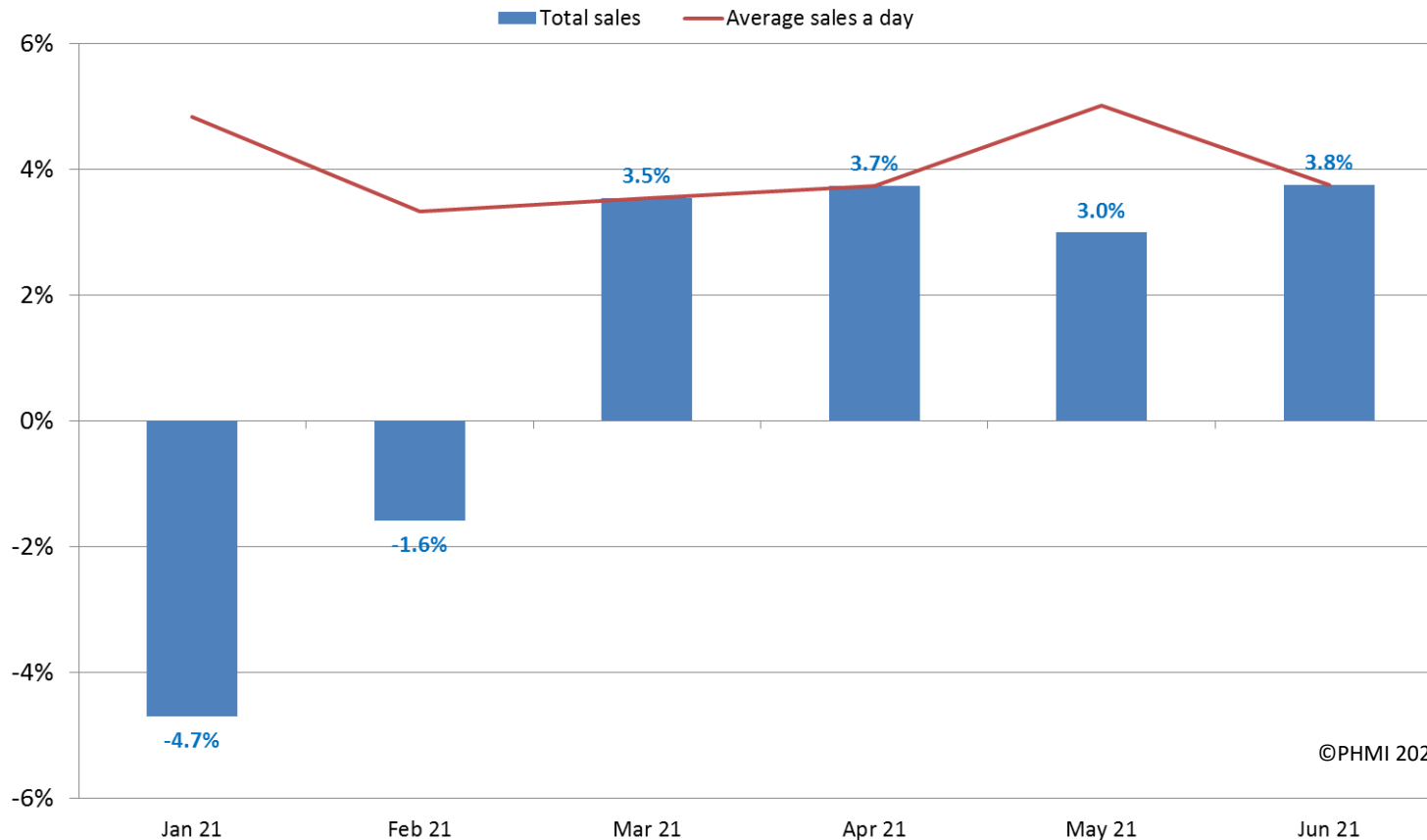
Year To Date: 2021 v 2019

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

©PHMI 2021

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

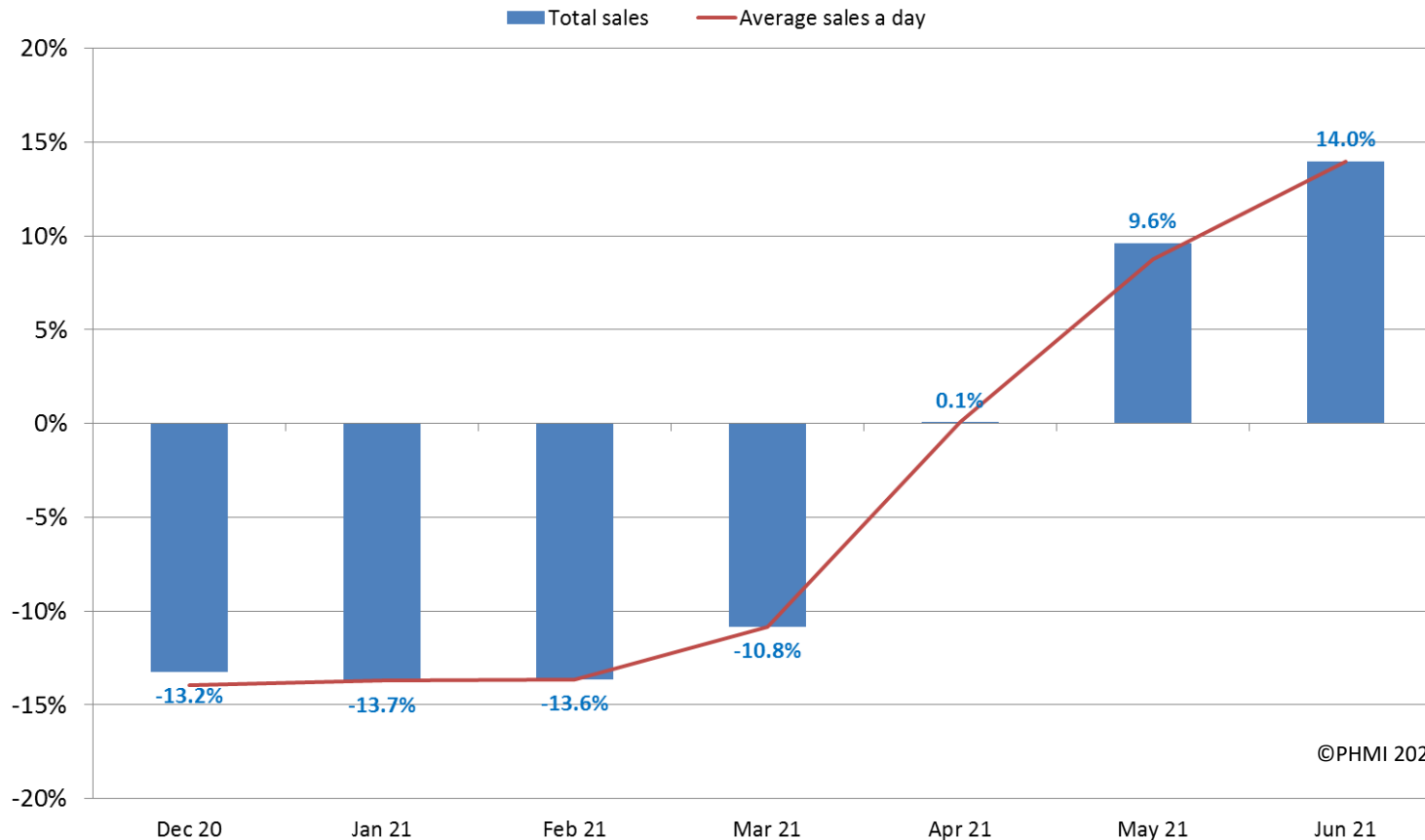
Last 12 months: Year on year

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

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

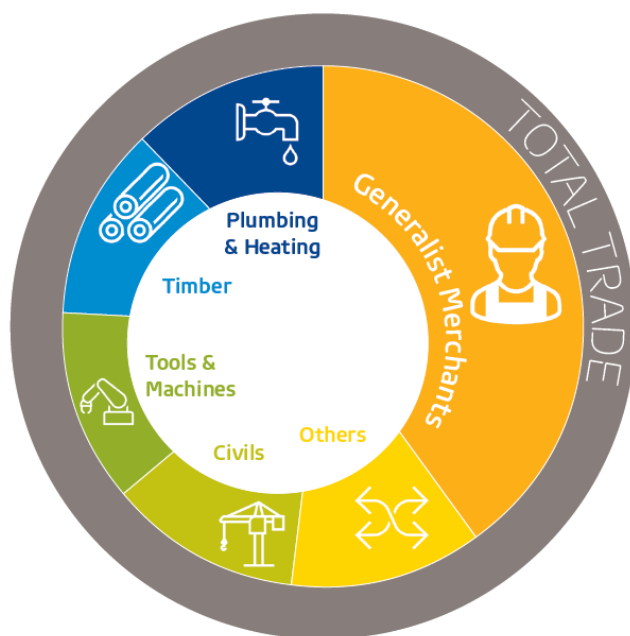
Full Year

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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More data available

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