

Excellence in building
materials supply

Plumbing & Heating Merchant Index



Monthly report for April 2025

(Published 26 June 2025)

A Builders Merchant Building Index Publication

Highlights:

Plumbing & Heating Merchant Index



PHMI Report April 2025 Highlights (unadjusted for trading days)

Plumbing & Heating Merchant Index



www.phmi.co.uk

+0.7%



Latest month v last year

Apr 2025 value sales up +0.7%
on Apr 2024



Latest month v previous month

Apr 2025 value sales down -12.4%
on Mar 2025

+3.8%



Latest 3 months v last year

Feb 2025 - Apr 2025 value sales up +3.8% on
Feb 2024 - Apr 2024

+0.7%



Latest 12 months v last year

May 2024 - Apr 2025 value sales up +0.7%
on May 2023 - Apr 2024

Value sales
in April 2025
were up +0.7%
compared with
April 2024.
Volume sales
decreased by
-3.8% and prices
up by +4.6%.

-12.4%

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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 70% 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.

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. PHMI Index data is calculated against the base period January 2019 to December 2019. 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 (Builders Merchants Federation), 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 Mike Rigby: mike@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.vanderryst@nielseniq.com.

Overview and Insights

April value sales up +0.7% compared to last year. Volume sales down by -3.8%. Prices up +4.6%.

Total plumbing and heating value sales, from over 70% of specialist Plumbing & Heating Merchants throughout Great Britain, in April 2025 were up +0.7% compared with April 2024. With one less trading day this year, like-for-like value sales (which take trading day differences into account) were +5.7% higher. Volume sales decreased by -3.8% and prices up by +4.6%.

April's value sales were -12.4% down on March's. With one less trading day this month, like-for-like value sales were -8.0% lower. Volume sales were -5.3% lower and prices down -7.5%.

April's PHMI index was 98.0. With one less trading day this month versus the Index base period, the like-for-like value sales index was 101.3.

Value sales in the three months February 2025 to April 2025 were +3.8% up compared to the same period last year. With one less trading day in the most recent period, like-for-like value sales were +5.5% higher. Volume sales were up +2.0% and prices were +1.8% higher.

Value sales in the three months February 2025 to April 2025 were +2.5% higher compared to the previous three months, November 2024 to January 2025. With one more trading day in the most recent period, like-for-like value sales were +0.8% higher. Volume sales were +3.7% higher and prices were down -1.2%.

Value sales in January 2025 to April 2025 were up +3.2% compared to the same period last year. With one less trading day this period, like-for-like value sales were +4.5% higher. Volume sales were up +3.3% but prices were flat.

Total value sales in the last 12 months were +0.7% up compared to May 2023 to April 2024. There was no difference in trading days. Volume sales were up +4.3% but prices were -3.4% lower.

Total value sales in the last 12 months were +0.7% up compared to May 2023 to April 2024.

Volume sales were up +4.3% but prices were -3.4% lower.

Monthly and 3-monthly

Value sales % change

Year-on-year: May 2024 to April 2025

Plumbing & Heating Merchant Index



NIQ **GfK**

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

May 24	Jun 24	Jul 24	Three months
-1.3%	-8.6%	+5.7%	-1.5%
Aug 24	Sep 24	Oct 24	Three months
-4.4%	+2.4%	+6.3%	+1.7%
Nov 24	Dec 24	Jan 25	Three months
-3.6%	-1.5%	+1.6%	-1.2%
Feb 25	Mar 25	Apr 25	Three months
-1.2%	+12.1%	+0.7%	+3.8%

Value sales in the three months February 2025 to April 2025 were +3.8% up compared to the same period last year.

Volume sales were up +2.0% and prices were +1.8% higher.

Latest month v last year

Value sales and like-for-like value sales % change

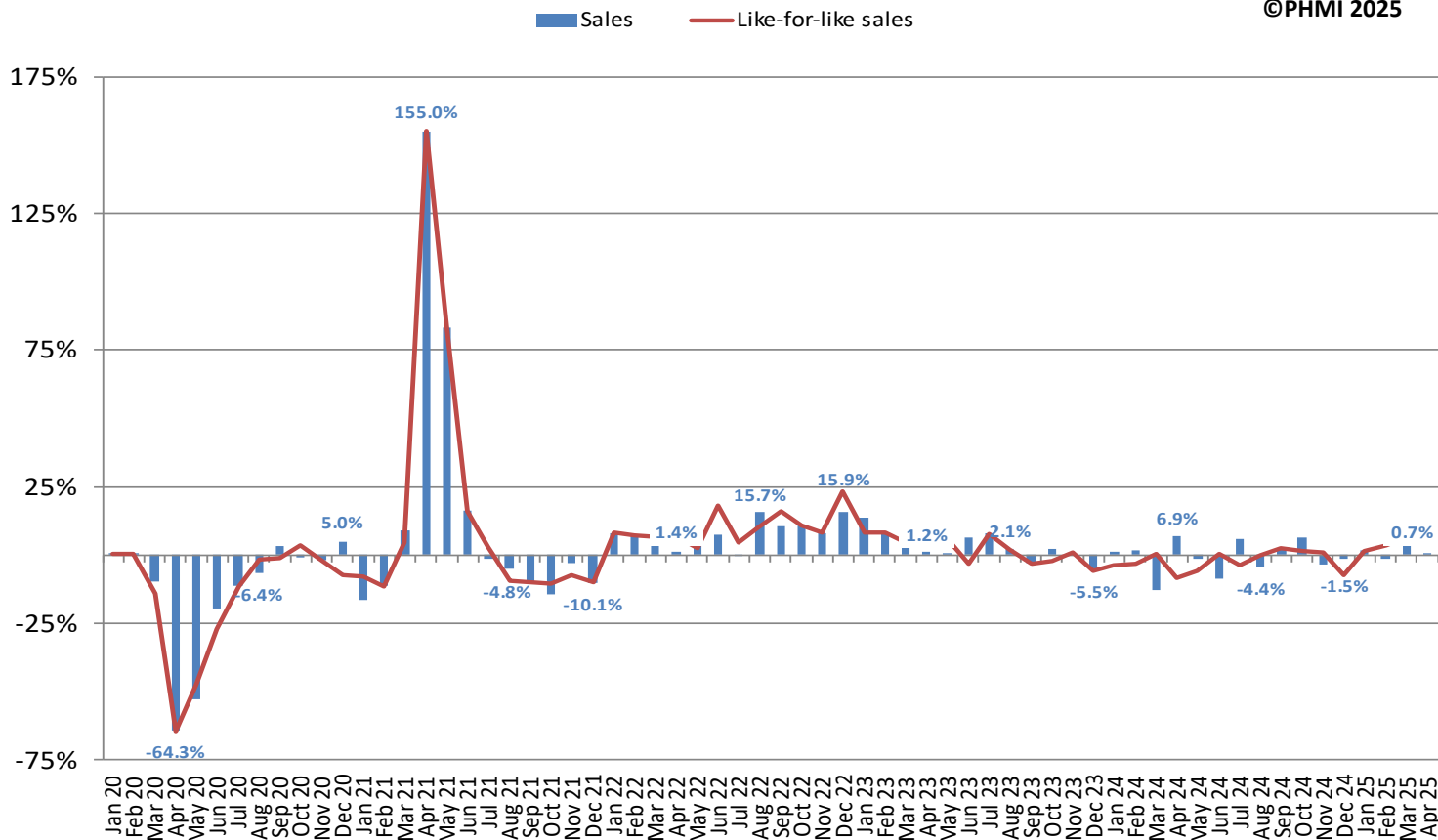
20 trading days this year v 21 trading days last year.*

Like-for-like sales take trading day differences into account.

Plumbing & Heating Merchant Index



Latest month v last year



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

NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Value sales in April
2025 were up +0.7%
compared with
April 2024.

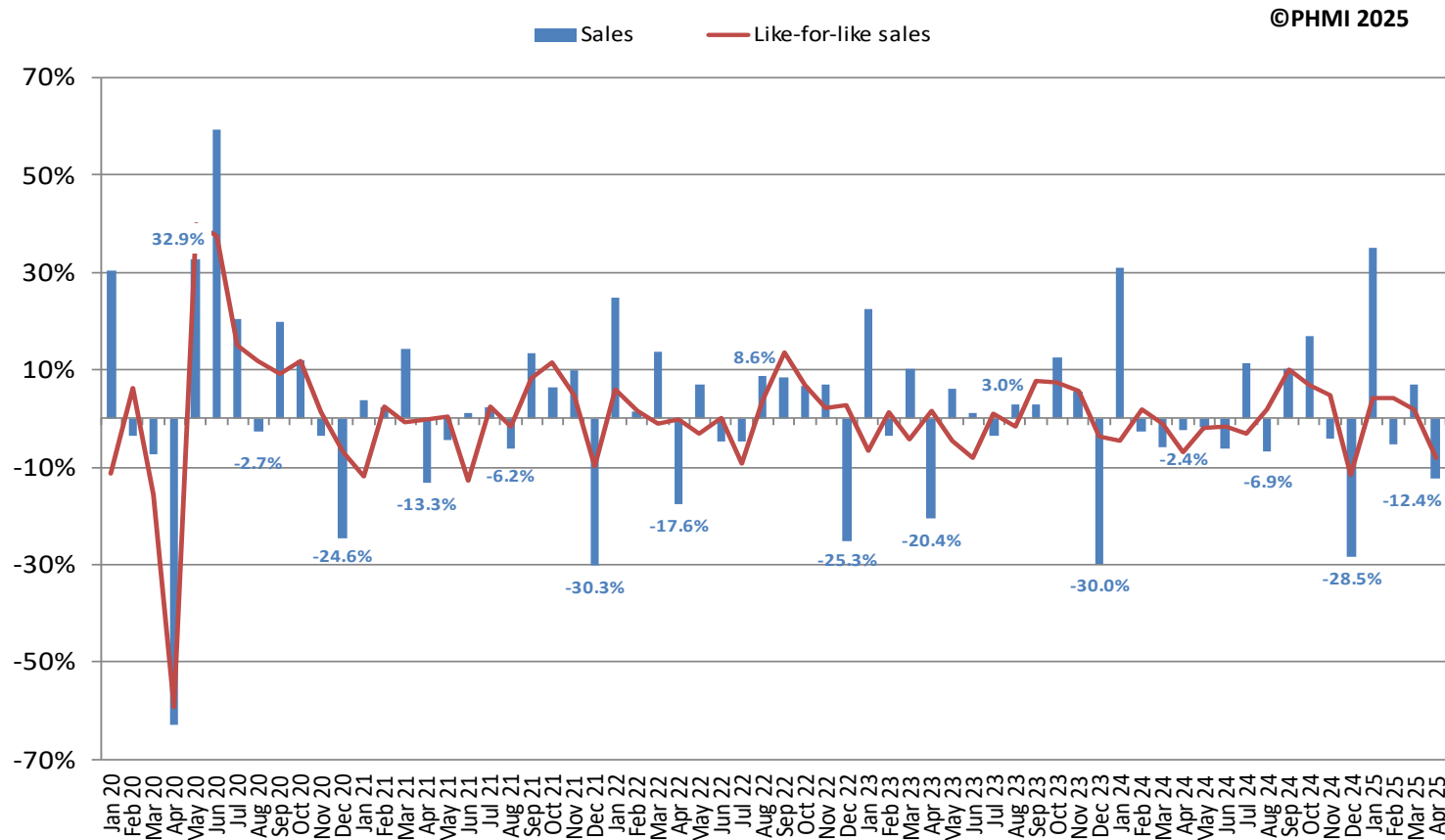
Volume sales
decreased by -3.8%
with prices up
by +4.6%.

Latest month v previous month

Value sales and like-for-like value sales % change

20 trading days this month v 21 trading days last month.*
Like-for-like sales take trading day differences into account.

Month v previous month



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

April's value sales were
-12.4% down
on March's.

Volume sales were
-5.3% lower and prices
down -7.5%.

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

Monthly: Index

Value sales and like-for-like value sales index

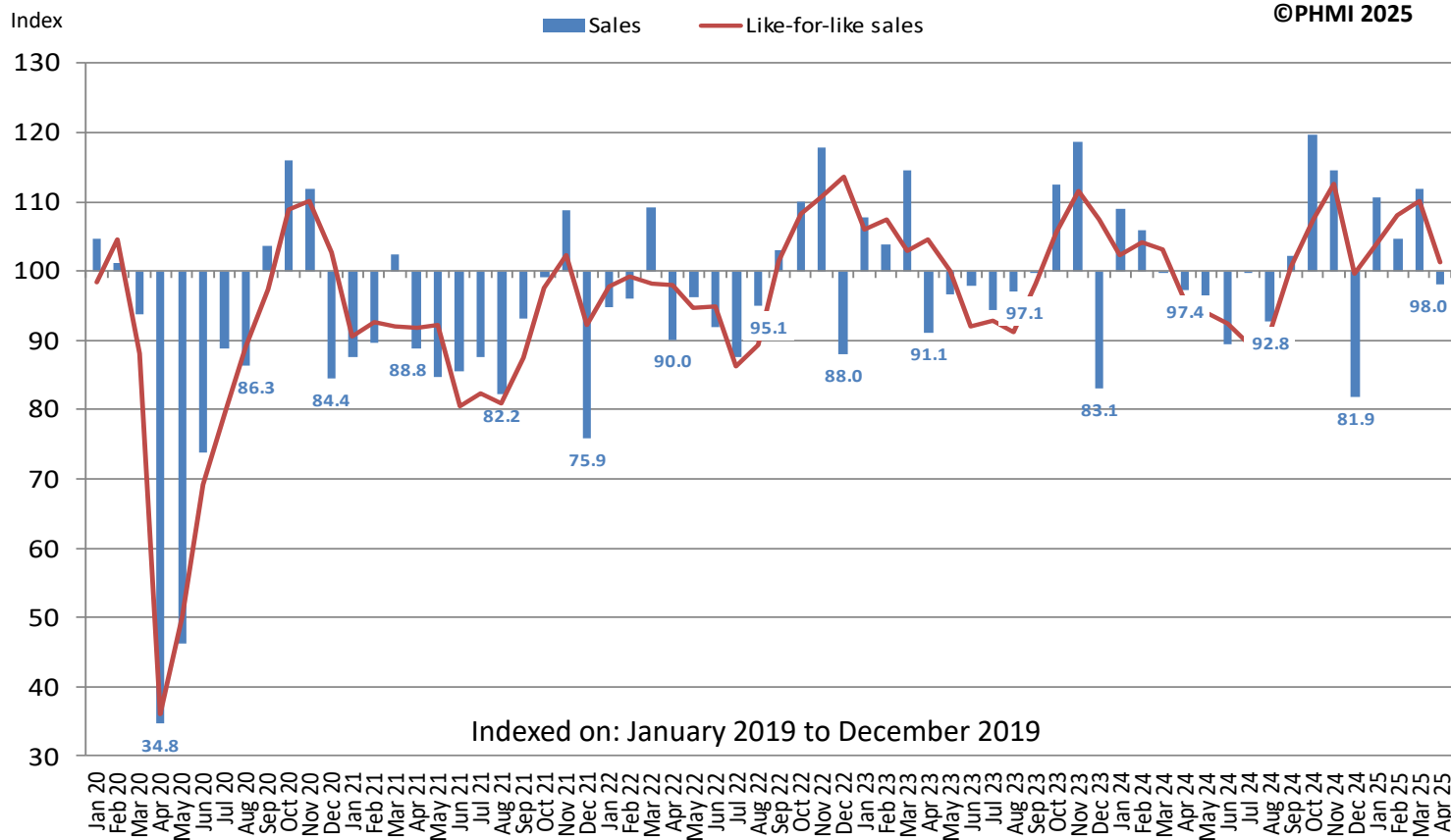
20 trading days this month v 21 trading days in the Index base period.*

Like-for-like sales take trading day differences into account.

Plumbing & Heating Merchant Index



Indices: January 2020 to April 2025



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

April's PHMI index
was 98.0.

With one less trading
day this month versus
the Index base period,
the like-for-like value
sales index was 101.3.

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

Latest 3 months v last year

Value sales and like-for-like value sales % change

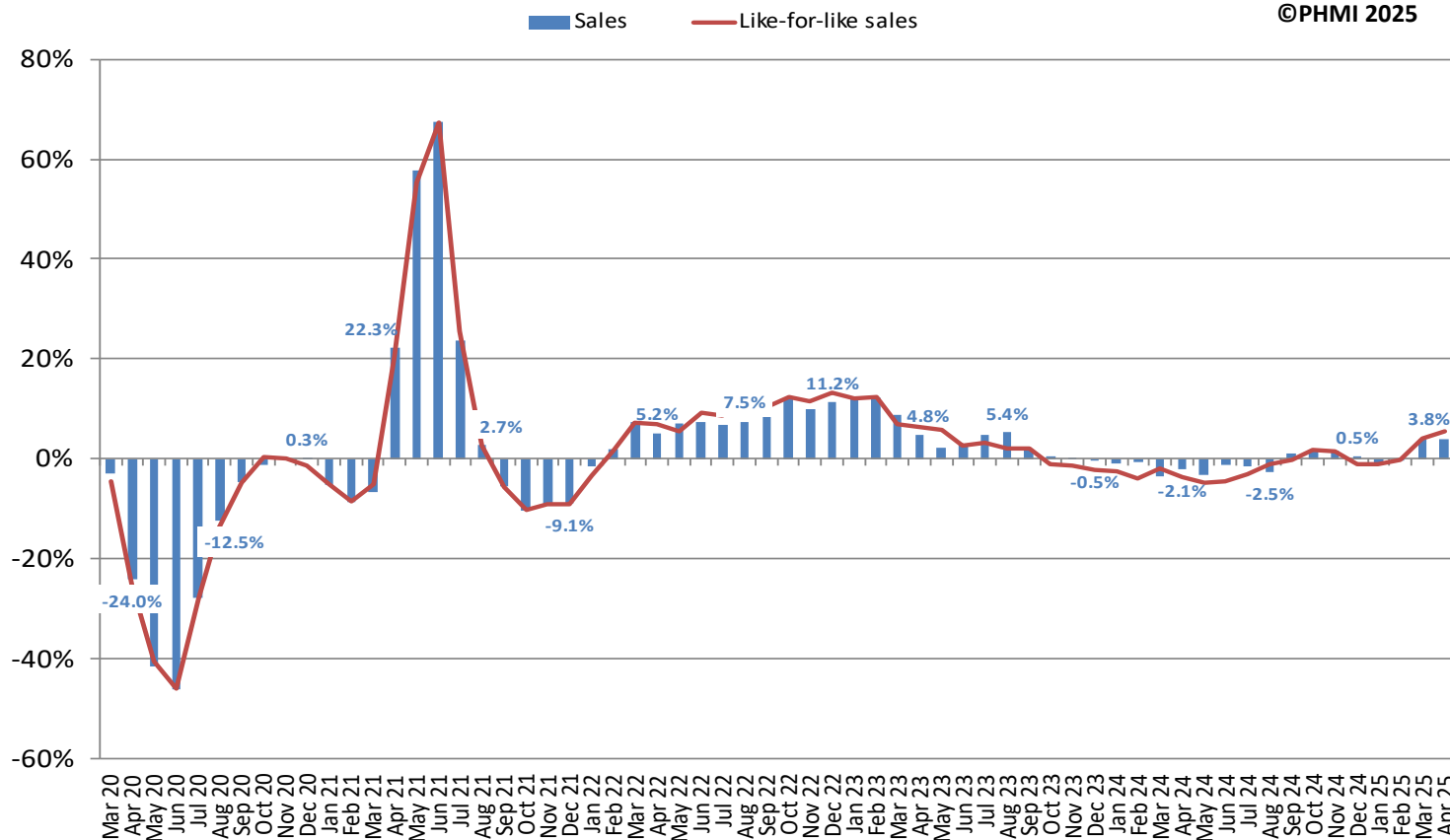
61 trading days in the most recent period v 62 trading days last year.

Like-for-like sales take trading day differences into account.

Plumbing & Heating Merchant Index



Latest 3 months v last year



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Value sales in the three months February 2025 to April 2025 were +3.8% up compared to the same period last year.

Volume sales were up +2.0% and prices were +1.8% higher.

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

Latest 3 months v previous 3 months

Value sales and like-for-like value sales % change

61 trading days in the most recent period v 60 trading days last period.*

Like-for-like sales take trading day differences into account.

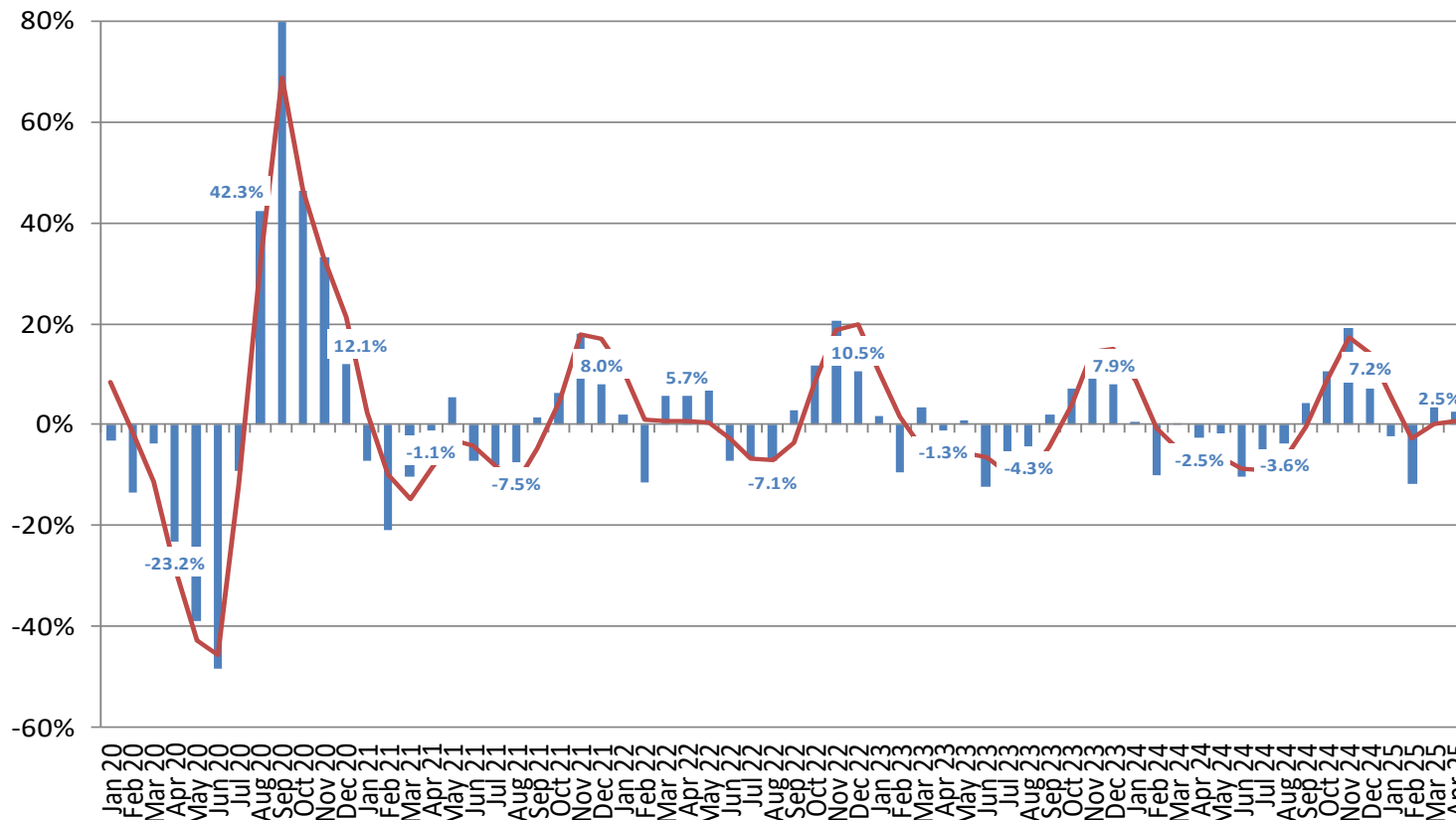
Plumbing & Heating Merchant Index



Latest 3 months v previous 3 months

Sales Like-for-like sales

©PHMI 2025



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Value sales in the three months February 2025 to April 2025 were +2.5% higher compared to the previous three months, November 2024 to January 2025.

Volume sales were +3.7% higher and prices were down -1.2%.

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

Year-to-date v last year

Value sales and like-for-like value sales % change

83 trading days this year v 84 trading days last year.

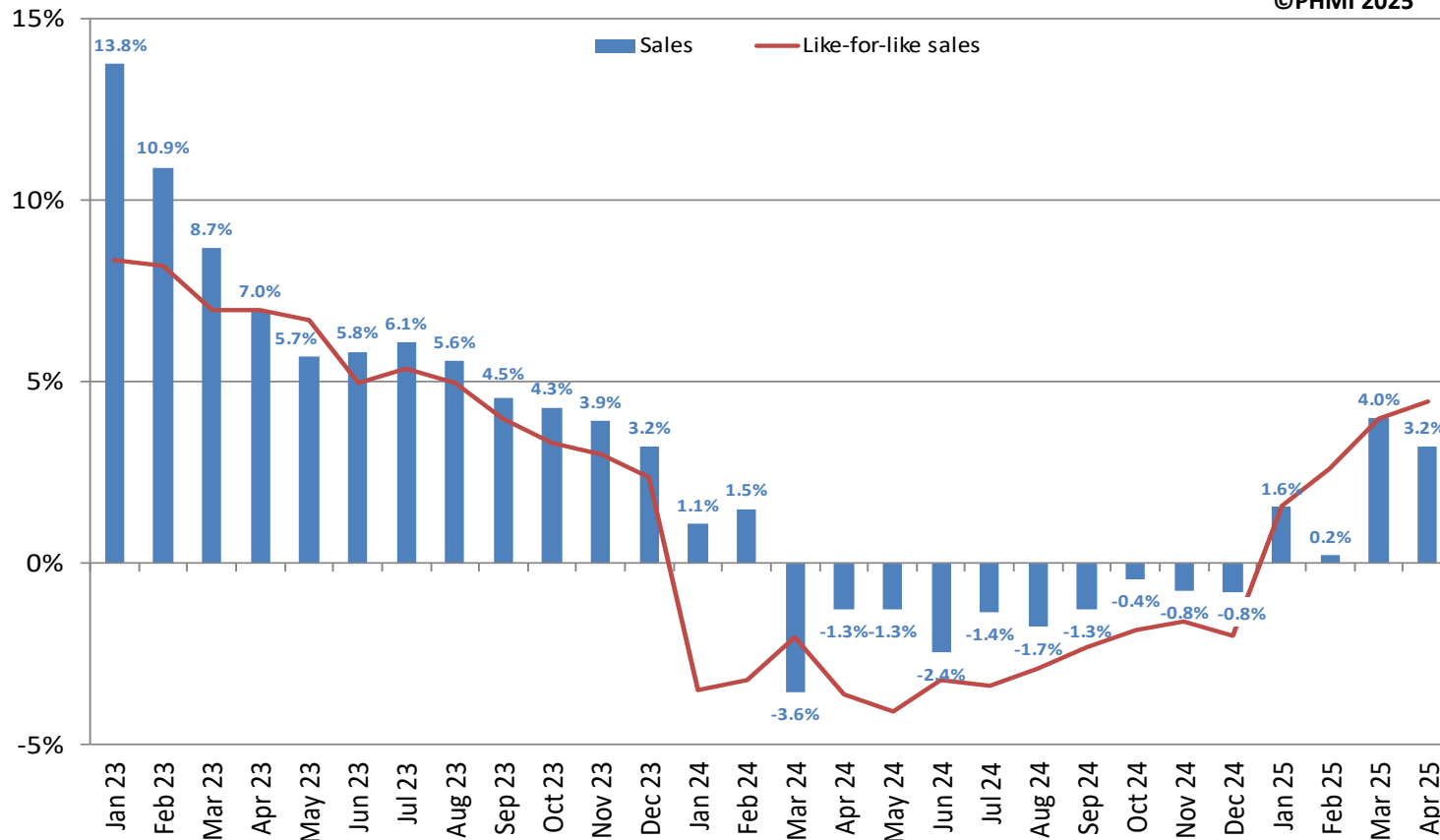
Like-for-like sales take trading day differences into account

Plumbing & Heating Merchant Index



Year to date: Jan 25 to Apr 25 v last year

©PHMI 2025



NIQ **GfK**

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Value sales in January
2025 to April 2025
were up +3.2%
compared to the same
period last year.

Volume sales were up
+3.3% and prices
and flat.

Latest 12 months v last year

Value sales and like-for-like value sales % change

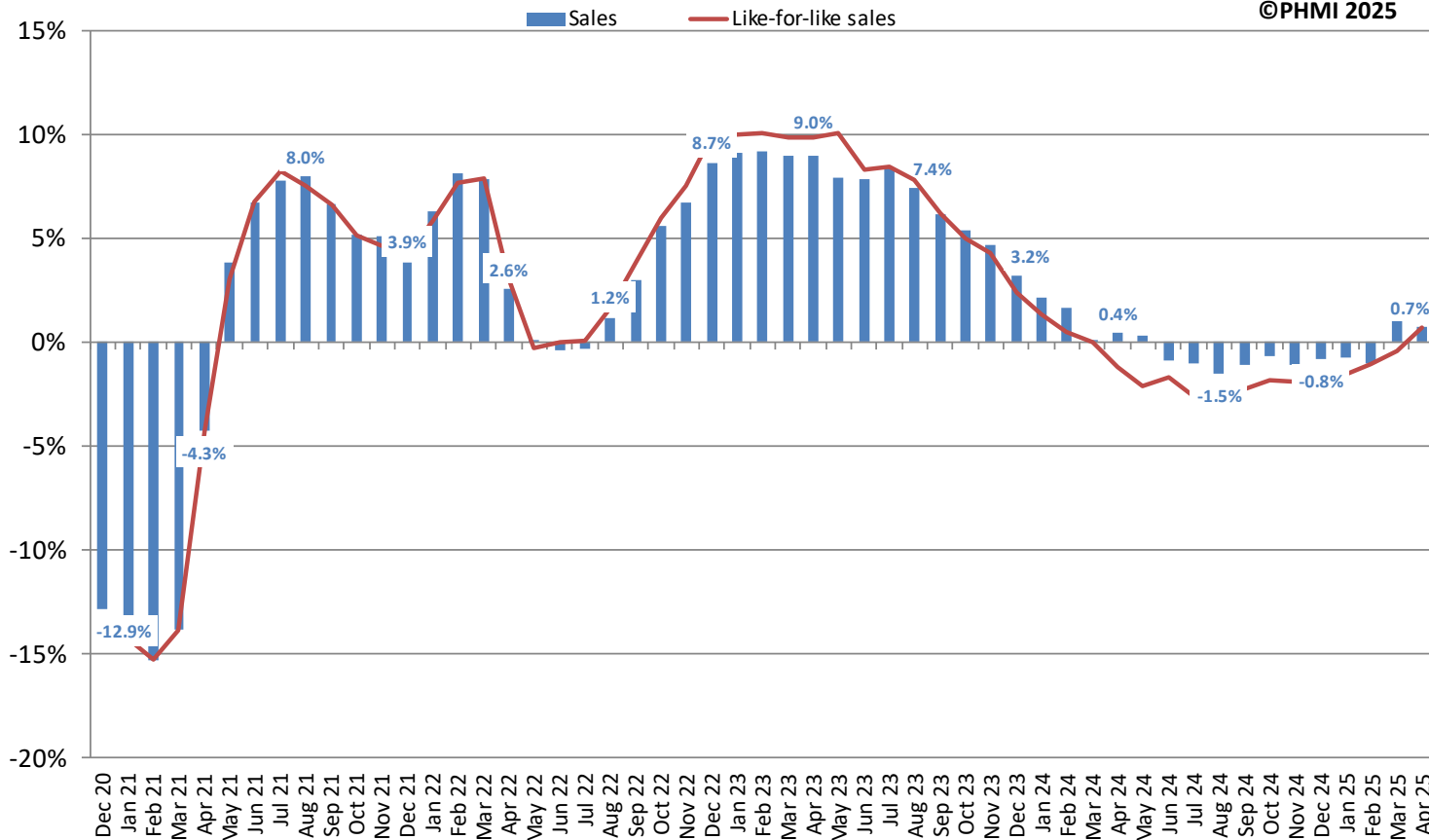
There was no difference in trading days (250).

Like-for-like sales take trading day differences into account

Plumbing & Heating Merchant Index



Latest 12 months v last year



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Total value sales in the last 12 months were +0.7% up compared to May 2023 to April 2024.

Volume sales were up +4.3% but prices were -3.4% lower.

PHMI Trading Days



Source: GfK's Builders Merchants
Total Category Report: January
2019 to April 2025

Monthly

Index: 20.7

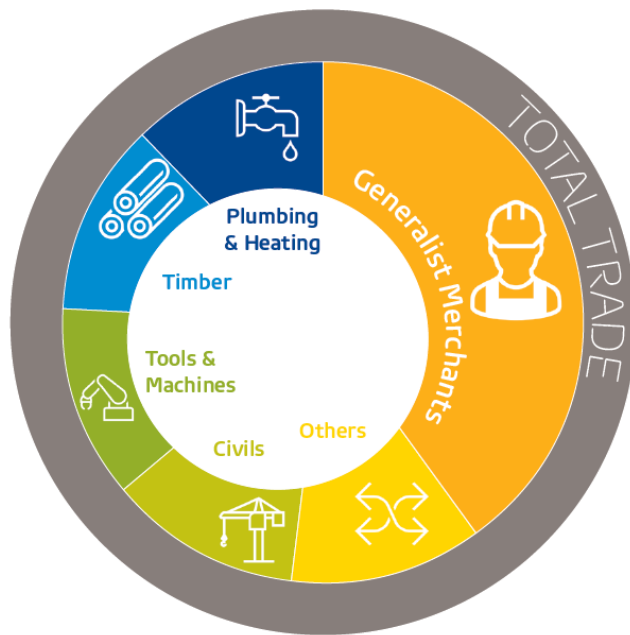
2023											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	23	18	20	22	21	22	21	22	22	16
2024											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	21	20	21	21	20	23	21	21	23	21	17
2025											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20								

Quarterly

Index: 62.0

2023				2023		2023
Q1	Q2	Q3	Q4	H1	H2	
64	60	64	60	124	124	248
2024				2024		2024
Q1	Q2	Q3	Q4	H1	H2	
63	62	65	61	125	126	251
2025				2025		2025
Q1	Q2	Q3	Q4	H1	H2	
63						

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).

NIQ



Merchant partners include:



Plumbing Trade Supplies



Building the Industry & Building Brands from Knowledge



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 Mike Rigby:



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More data available

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