

Excellence in building
materials supply

Plumbing & Heating Merchant Index



Monthly report for August 2025

(Published 24 October 2025)

A Builders Merchant Building Index Publication

Highlights:

Plumbing & Heating Merchant Index



PHMI Report

August 2025 Highlights

(unadjusted for trading days)

Plumbing & Heating Merchant Index



www.phmi.co.uk

+2.4%

+2.5%

+2.0%



Latest month v last year

Aug 2025 value sales down -2.6%

on Aug 2024



Latest three months v last year

Jun - Aug 2025 value sales up +2.4%

on Jun - Aug 2024



Year-to-date

Jan - Aug 2025 value sales up +2.5%

on Jan - Aug 2024



Latest 12 months v last year

Sep 2024 - Aug 2025 value sales up +2.0%

on Sep 2023 - Aug 2024

-2.6%

“Total Plumbing & Heating Merchants value sales in August 2025 were down -2.6% compared with August 2024. Volume sales dropped by -9.2% but prices rose by +7.3%.”

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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 Callum Budd: callum@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

Plumbing & Heating Merchant Index



August value sales down -2.6% compared to last year. Volume sales down -9.2%. Prices up +7.3%.

Total Plumbing and Heating **value** sales, in August 2025, from over 70% of specialist Plumbing & Heating Merchants throughout Great Britain, were down -2.6% compared with August 2024. **Volume** sales dropped by -9.2% but **prices** rose by +7.3%. With one less trading day this year, like-for-like **value** sales (which take trading day differences into account) were up +2.3%.

August's Total Plumbing & Heating Merchants **value** sales were -12.8% down on July's. Total Plumbing & Heating Merchants **volume** sales were -15.0% lower but **prices** were up +2.5%. With three less trading days this month, like-for-like **value** sales were up just +0.2%.

August's PHMI index was 90.4. With one less trading day this month versus the Index base period, the like-for-like **value** index was 93.4.

Total Plumbing & Heating Merchants **value** sales in the three months June to August 2025 were +2.4% up compared to the same period last year. Total Plumbing & Heating Merchants **volume** sales were -2.8% down but **prices** were +5.3% higher. There was no difference in trading days.

Total Plumbing & Heating Merchants **value** sales in the three months June to August 2025 were -5.5% lower compared to the previous three months, March to May 2025. Total Plumbing & Heating Merchants **volume** sales were -2.6% lower and **prices** were down -2.9%. With three more trading days in the most recent period, like-for-like **value** sales were -9.9% lower.

Total **value** sales in the first eight months January to August, year-to-date were up +2.5% compared to the same period last year. Total Plumbing & Heating Merchants **volume** sales were down -0.2% and **prices** were up +2.7%. With two less trading days this period, like-for-like **value** sales were +3.8% higher.

Total Plumbing & Heating Merchants **value** sales in the last 12 months were +2.0% up compared to September 2023 to August 2024. Total Plumbing & Heating Merchants **volume** sales were up +1.8% and **prices** were up +0.2%. With one less trading day this period, like-for-like **value** sales were up +2.4%.

Total Plumbing & Heating Merchants **value** sales in the last 12 months were +2.0% up compared to September 2023 to August 2024.

Total Plumbing & Heating Merchants **volume** sales were up +1.8% and **prices** were up +0.2%.

Monthly and 3-monthly

Value sales % change

Year-on-year: September 2024 to August 2025

Plumbing & Heating Merchant Index



NIQ **GfK**

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

Sep 24	Oct 24	Nov 24	Three months
+2.4%	+6.3%	-3.6%	+1.6%
Dec 24	Jan 25	Feb 25	Three months
-1.5%	+1.6%	-1.2%	-0.3%
Mar 25	Apr 25	May 25	Three months
+12.1%	+0.7%	+0.1%	+4.4%
Jun 25	Jul 25	Aug 25	Three months
+5.6%	+4.1%	-2.6%	+2.4%

Total Plumbing & Heating Merchants **value** sales in the three months June to August 2025 were +2.4% up compared to the same period last year.

Total Plumbing & Heating Merchants **volume** sales were -2.8% down but **prices** were +5.3% higher.

Latest month v last year

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

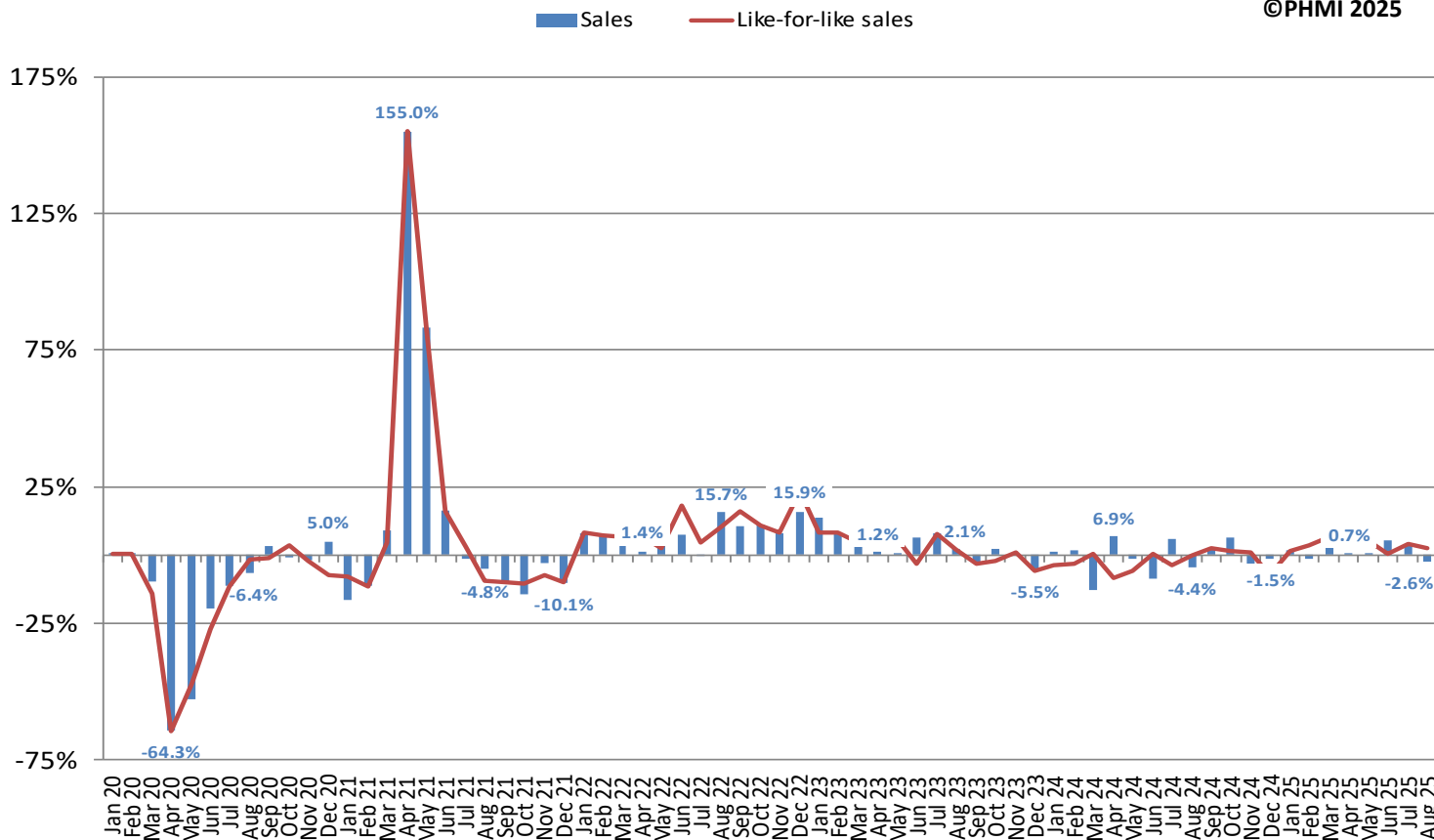
20 trading days this year v 21 trading days last year.

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 August 2025

Total Plumbing & Heating Merchants **value** sales in August 2025 were down -2.6% compared with August 2024.

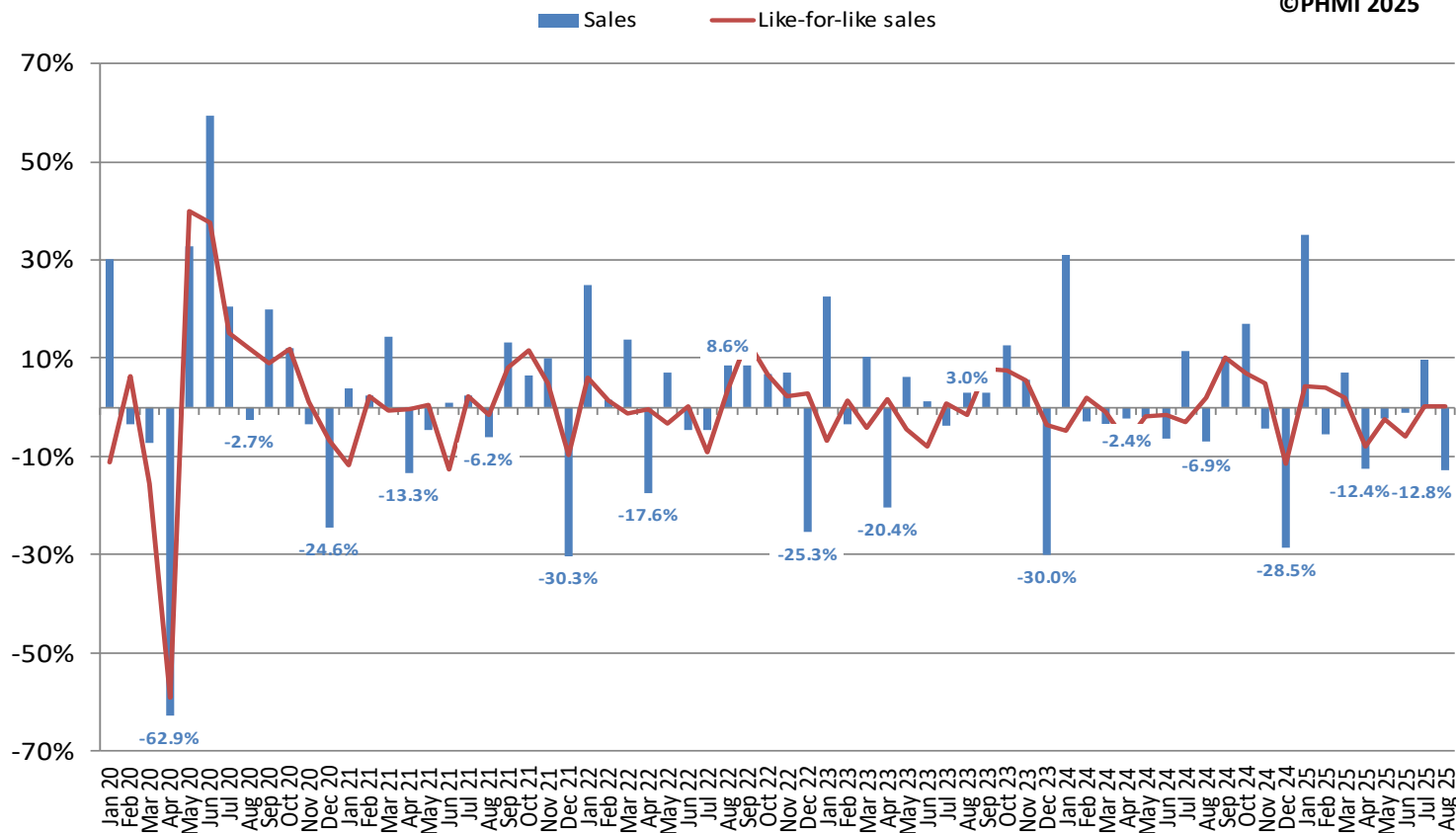
Total Plumbing & Heating Merchants **volume** sales dropped by -9.2% but **prices** rose by +7.3%.

Latest month v previous month

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

20 trading days this year v 23 trading days last year.*
Like-for-like sales take trading day differences into account.

Month v previous month



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

August's Total Plumbing & Heating Merchants **value** sales were -12.8% down on July's.

Total Plumbing & Heating Merchants **volume** sales were -15.0% lower but **prices** were up +2.5%.

*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

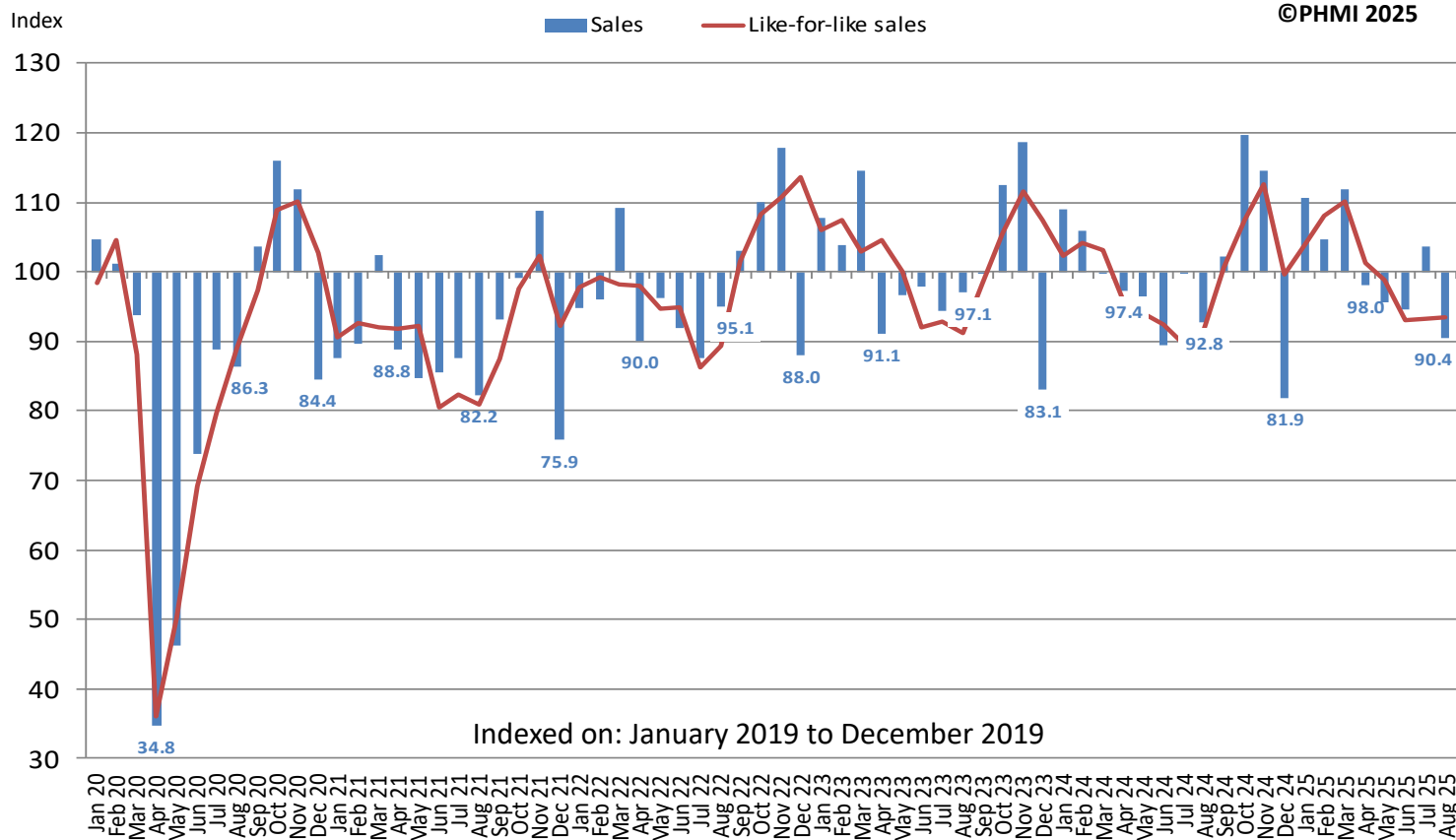
20 trading days this month v 21 trading days in the Index base period.*

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

Plumbing & Heating Merchant Index



Indices: January 2020 to August 2025



NIQ GfK

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

August's PHMI index
was 90.4.

With one less trading
day this month versus
the Index base period,
the like-for-like value
index was 93.4.

*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

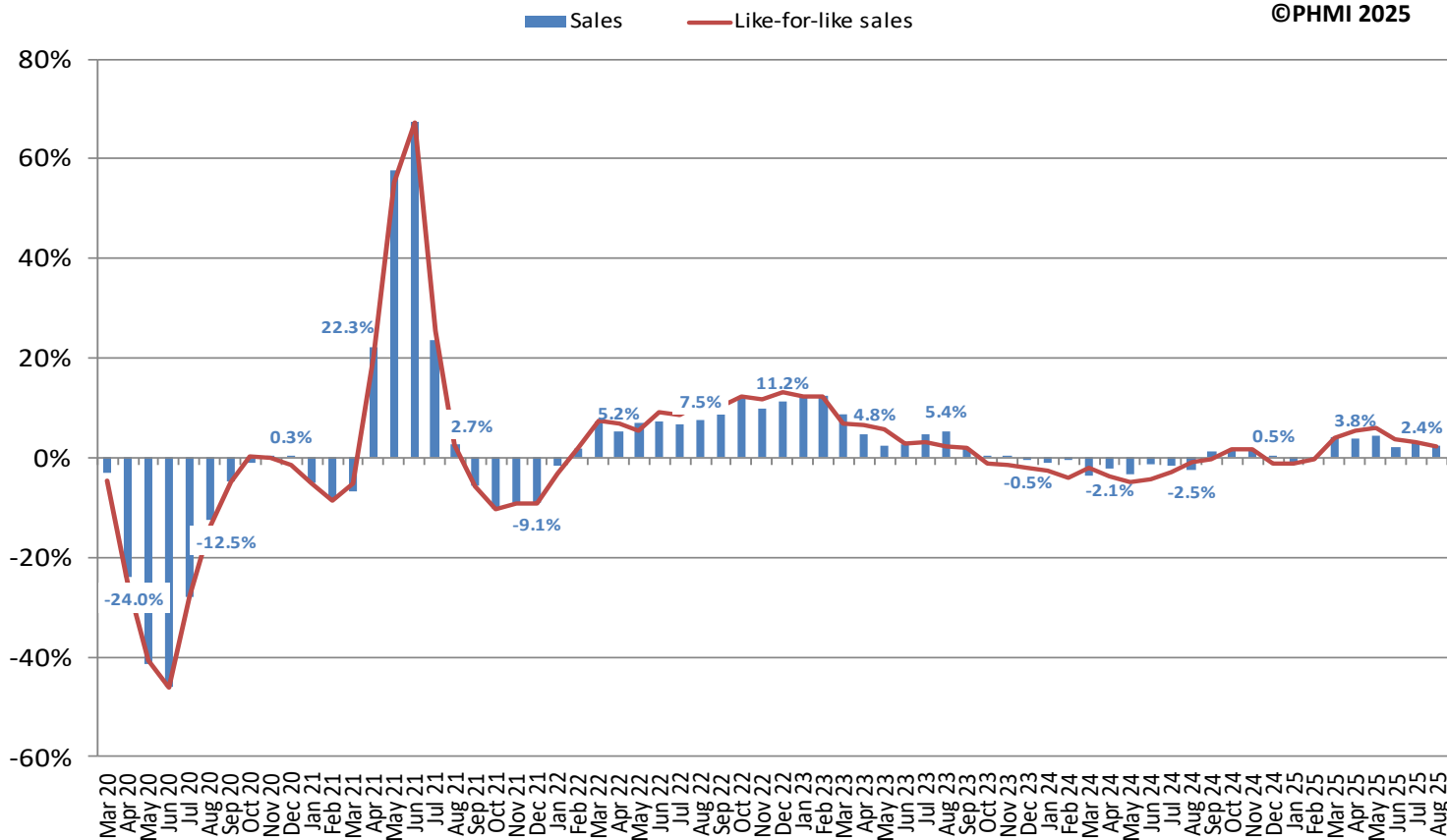
There was no difference in trading days (64).*

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 August 2025

Total Plumbing & Heating Merchants **value** sales in the three months June to August 2025 were +2.4% up compared to the same period last year.

Total Plumbing & Heating Merchants **volume** sales were -2.8% down but **prices** were +5.3% higher.

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

Latest 3 v previous 3 months

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

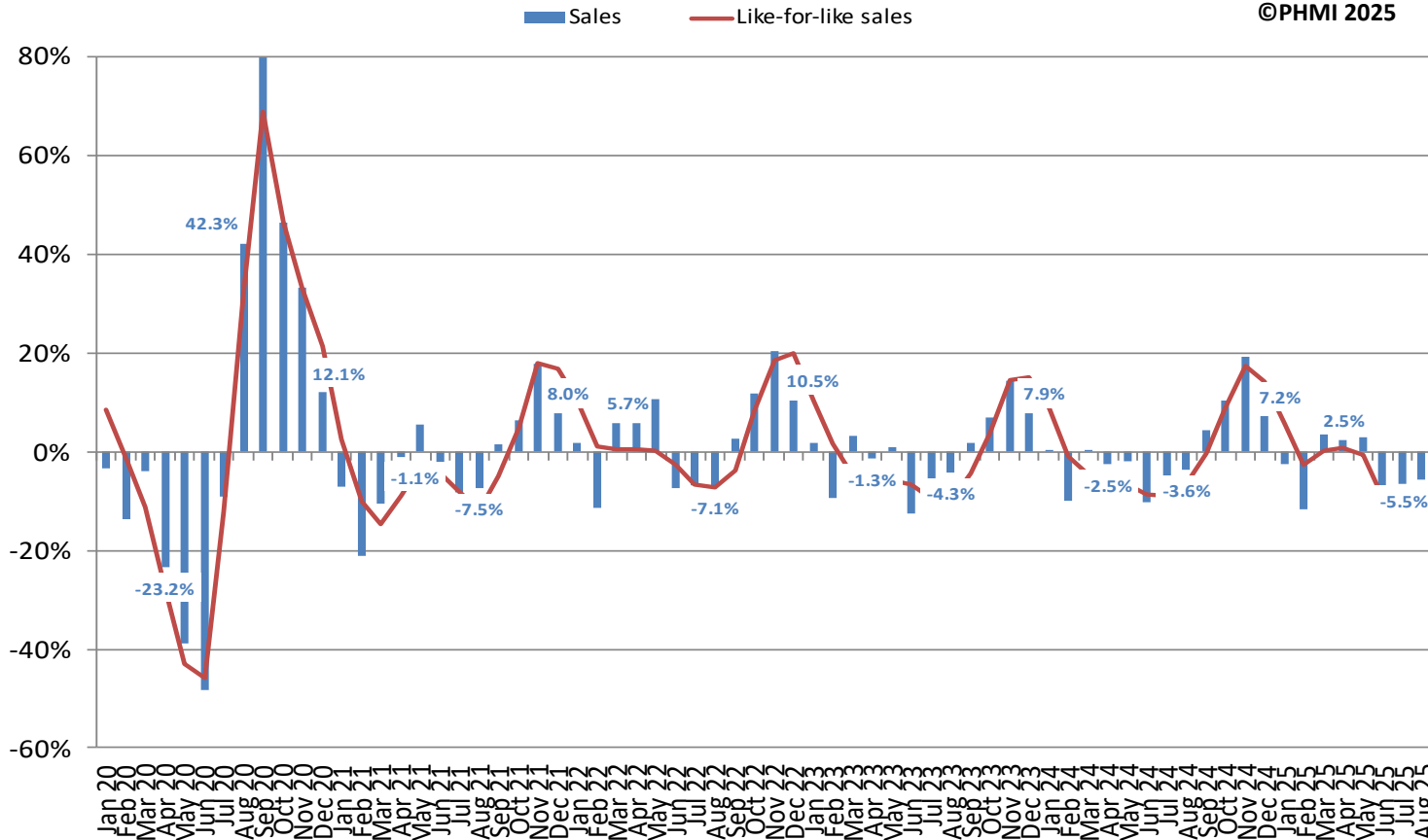
64 trading days in the most recent period v 61 trading days last period.*

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

Plumbing & Heating Merchant Index



Latest 3 months v previous 3 months



NIQ GfK

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

Total Plumbing & Heating Merchants **value** sales in the three months June to August 2025 were -5.5% lower compared to the previous three months, March to May 2025.

Total Plumbing & Heating Merchants **volume** sales were -2.6% lower and **prices** were down -2.9%.

*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

167 trading days this year v 169 trading days last year.

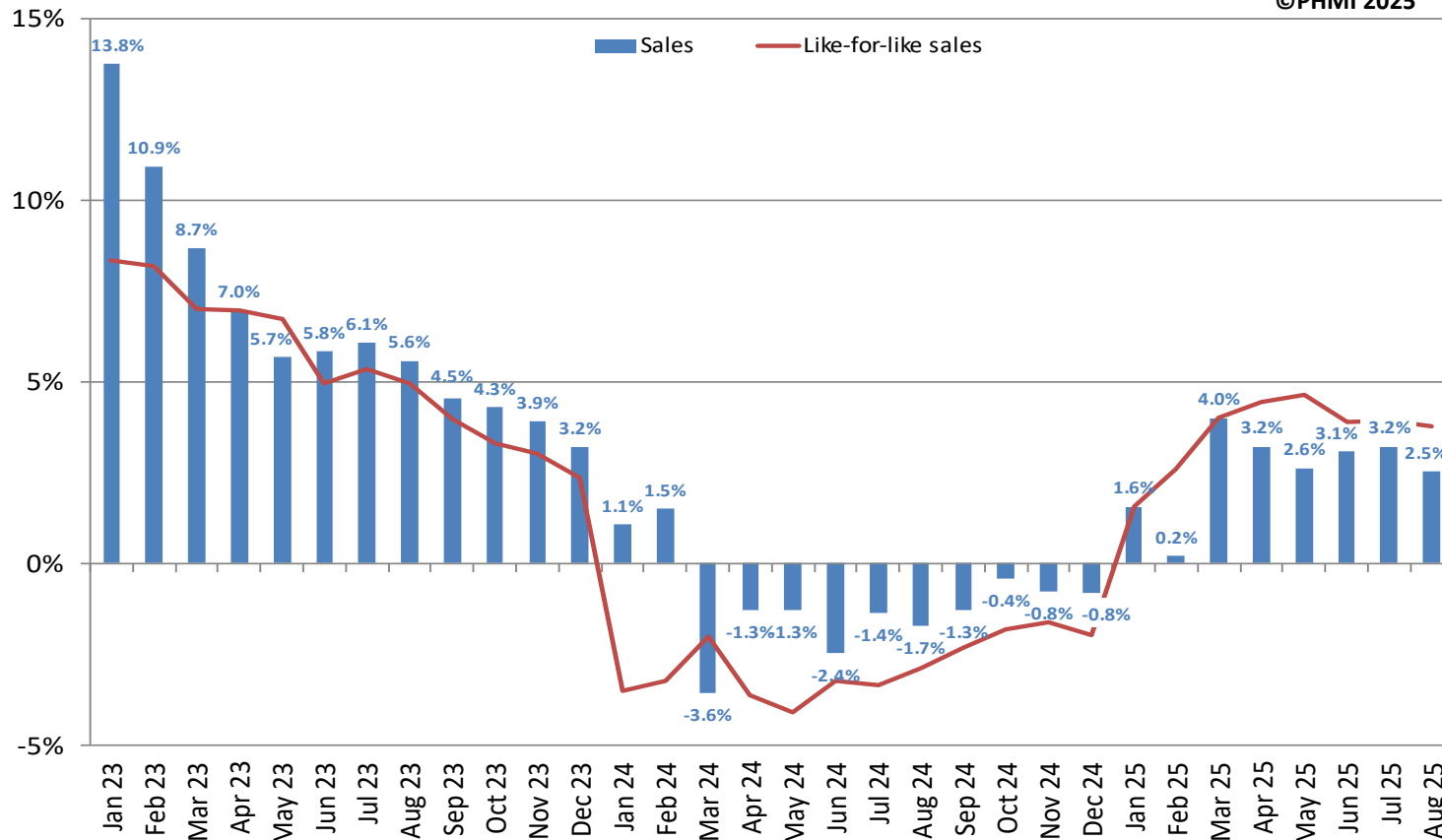
Like-for-like sales take trading day differences into account.

Plumbing & Heating Merchant Index



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

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NIQ GfK

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

Total Plumbing & Heating Merchants **value** sales in January to August 2025 were up +2.5% compared to the same period last year.

Total Plumbing & Heating Merchants **volume** sales were down -0.2% and **prices** were up +2.7%.

Latest 12 months v last year

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

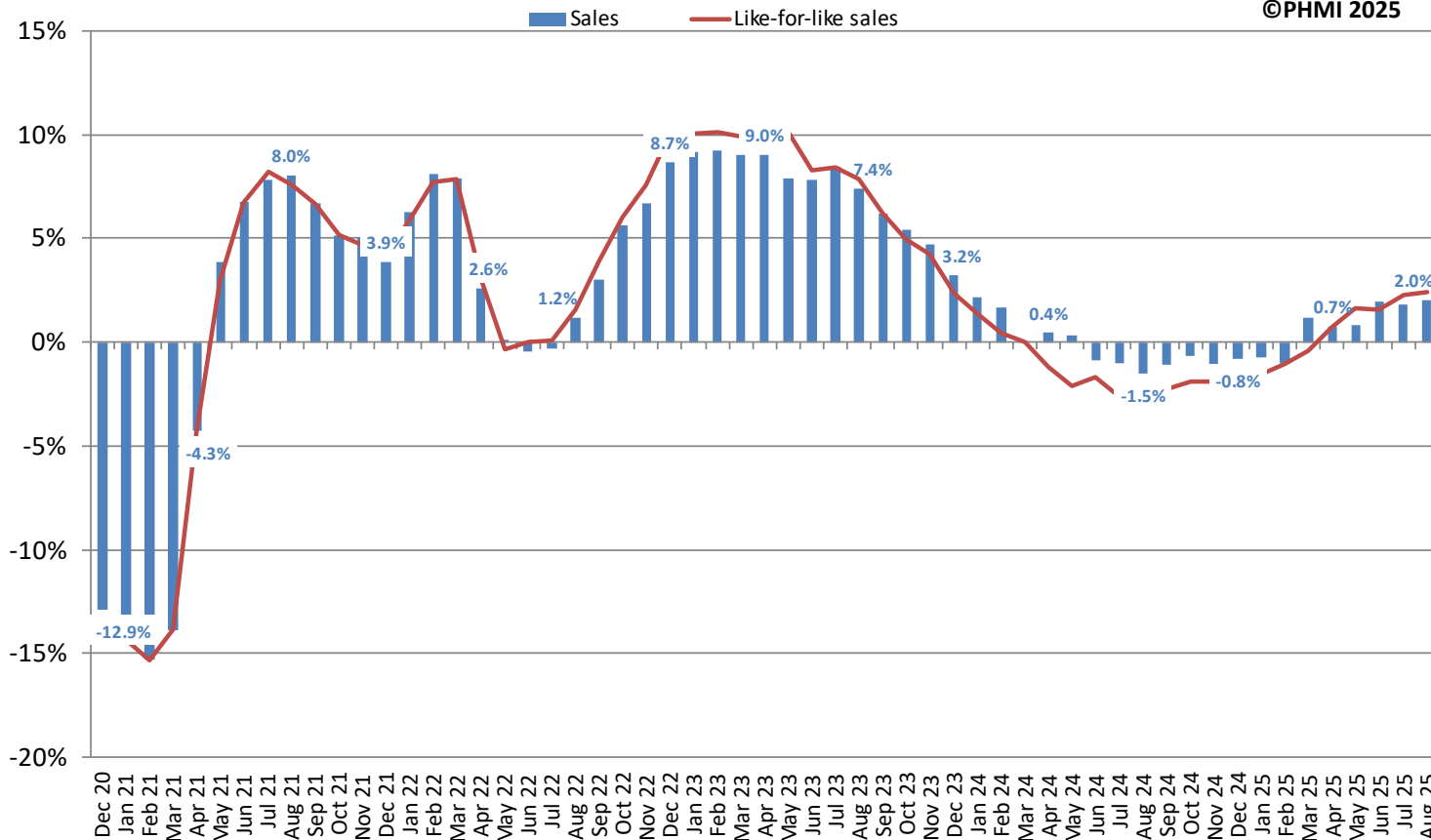
249 trading days in the latest 12 months v 250 trading days last year.

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 August 2025

Total Plumbing & Heating Merchants **value** sales in the last 12 months were +2.0% up compared to September 2023 to August 2024.

Total Plumbing & Heating Merchants **volume** sales were up +1.8% and **prices** were up +0.2%.

PHMI Trading Days



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

Monthly

Index: 20.7

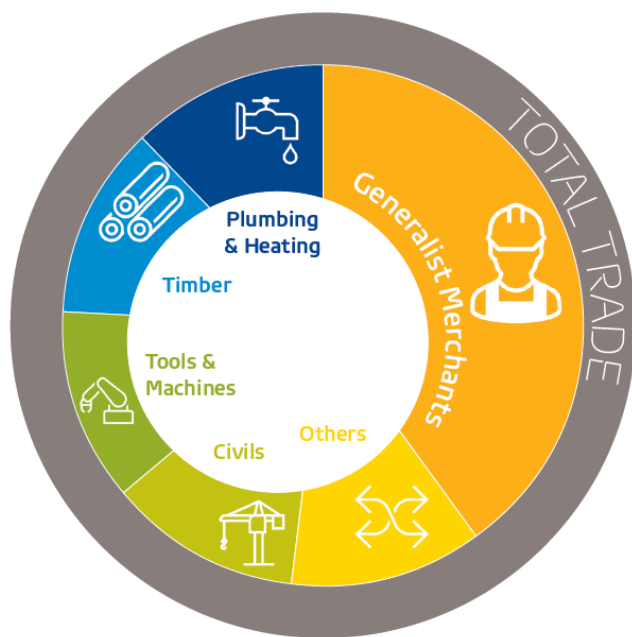
2023											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	23	18	20	22	21	22	21	22	22	16
2024											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	21	20	21	21	20	23	21	21	23	21	17
2025											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	20	21	23	20				

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	61			124		

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 Callum Budd:



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More data available

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