

Excellence in building
materials supply

Plumbing & Heating Merchant Index



Monthly report for August 2026

(Published 28 October 2026)

A Builders Merchant Building Index Publication

Highlights: Like-for-like value sales

(Adjusted to remove the effect of trading days)

PHMI: August 2026

Like-for-like value sales

(adjusted to remove the effect of trading days)

Plumbing & Heating
Merchant Index



www.phmi.co.uk



+1.8%

Latest month
Aug 2026
v
Last year
Aug 2025

+0.2%

Latest 3 months
Jun 2026 - Aug 2026
v
Last year
Jun 2025 - Aug 2025

+0.5%

Latest 12 months
Sept 2025 - Aug 2026
v
Previous 12 months
Sept 2024 - Aug 2025

+0.2%

Year-to-date
Jan - Aug 2026
v
Last year
Jan - Aug 2025

Total Plumbing & Heating Merchants **like-for-like value** sales were +1.8% higher in August 2026 than in August 2025. **Like-for-like volume** sales were down -5.4% but **prices increased** by +7.6%.

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Highlights: Total (unadjusted) value sales

PHMI: August 2026 Total (unadjusted) value sales

Plumbing & Heating
Merchant Index 
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+1.8%

Latest month
Aug 2026
v
Last year
Aug 2025

+1.8%

Latest 3 months
Jun 2026 - Aug 2026
v
Last year
Jun 2025 - Aug 2025

+0.9%

Latest 12 months
Sept 2025 - Aug 2026
v
Previous 12 months
Sept 2024 - Aug 2025

+0.2%

Year-to-date
Jan - Aug 2026
v
Last year
Jan - Aug 2025

With no difference in trading days, **unadjusted value** sales increased by +1.8%. **Unadjusted volume** sales decreased by -5.4% and **prices** increased by 7.6%.

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Contents:

Click links below to visit pages

Plumbing & Heating Merchant Index:	
Highlights - Like-for-like value sales	2
Highlights - Total value sales	3
Contents	4
Introduction	5
Overview and Insights	6 - 7
Month and 3-month table, year-on-year, like-for-like value sales	8
Month and 3-month table, year-on-year, total value sales	9
Latest month v last year	10
Latest month v previous month	11
Monthly PHMI Index	12
Latest 3 months v previous year	13
Latest 3 months v previous 3 months	14
Latest 12 months v previous 12 months	15
Year-to-date v last year	16
Trading days	17
Plumbing & Heating channel definition and merchants	18
Brands behind PHMI	19
Contacting PHMI	20 - 21

The 'Contents' link below brings you back to this page.

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).

NiQ 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. NiQ 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. You can view previous reports [here](#), and subscribe to future reports [here](#).

NiQ 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 - 1

August 2026 like-for-like value sales up +1.8% compared to August 2025

August 2026 v August 2025

- Total Plumbing & Heating Merchants like-for-like value sales were +1.8% higher in August 2026 than in August 2025. Like-for-like volume sales were down -5.4% but prices increased by +7.6%.
- With no difference in trading days, unadjusted value sales also increased by +1.8%. Unadjusted volume sales decreased by -5.4% but prices increased by +7.6%.

Latest 3 months v last year

June 2026 - August 2026 v June 2025 - August 2025

- Total Plumbing & Heating Merchants like-for-like value sales in the three months June 2026 to August 2026 were +0.2% up compared to the same period last year. Like-for-like volume sales, however, decreased by -8.5% and prices increased by +9.5%.
- With one more trading day in the latest 3 months compared to last year, unadjusted value sales were 1.8% up. Unadjusted volume sales were -7.1% down but prices were up +9.5%.

August 2026 v August 2025

Total **like-for-like value** sales were up +1.8% in August 2026 v August 2025.

Like-for-like volumes were down -5.4% and **prices** were up +7.6%.

Overview continues on the next page...

Overview and Insights - 2

... continued from the previous page:

MAT: Latest 12 months v previous 12 months

September 2025 - August 2026 v September 2024 - August 2025

- Total Plumbing & Heating Merchants like-for-like value sales were +0.5% higher in September 2025 to August 2026 compared to the same period last year. But like-for-like volume sales were down -5.1% whilst prices were up +5.9%.
- With one more trading day this period, unadjusted value sales were up +0.9%. Unadjusted volume sales were down -4.7% while prices were up +5.9%.

Year-to-date v last year

January - August 2026 v January - August 2025

- Total Plumbing & Heating Merchants like-for-like value sales were up +0.2% in January 2026 to August 2026 compared to the same period last year. Like-for-like volume sales were down -6.3% but prices were +6.9% higher.
- With no difference in trading days this period, unadjusted value sales were also up +0.2%. Unadjusted volume sales were down -6.3% with prices up +6.9%.

Year-to-date v last year

Total like-for-like value sales were up +0.2% January to August 2026 v the same period last year.

Like-for-like volumes were down -6.3% but **prices** rose +6.9%.

Monthly and 3-monthly

Like-for-like value sales % change

Year-on-year: September 2025 to August 2026

Plumbing & Heating Merchant Index



Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Sep 25	Oct 25	Nov 25	Three months
+1.7%	+0.9%	+2.8%	+1.6%
Dec 25	Jan 26	Feb 26	Three months
-1.4%	+3.0%	-0.3%	+0.5%
Mar 26	Apr 26	May 26	Three months
-2.8%	+0.5%	+1.3%	-0.3%
Jun 26	Jul 26	Aug 26	Three months
-2.0%	+1.0%	+1.8%	+0.2%

**Latest 3 months
v last year**

**Like-for-like value
sales in 3 months June
to August 2026 were
+0.2% up compared to
the same period last
year.**

**Like-for-like volumes
were down -8.5% with
prices up +9.5%.**

Monthly and 3-monthly

Total value sales % change

Year-on-year: September 2025 to August 2026

Plumbing & Heating
Merchant Index



NIQ **GfK**

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Sep 25	Oct 25	Nov 25	Three months
+6.5%	+0.9%	-2.1%	+1.6%
Dec 25	Jan 26	Feb 26	Three months
+4.4%	-1.7%	-0.3%	+0.5%
Mar 26	Apr 26	May 26	Three months
+1.8%	+0.5%	-3.7%	-0.3%
Jun 26	Jul 26	Aug 26	Three months
+2.7%	+1.0%	+1.8%	+1.8%

**Latest 3 months
v last year**

With one more trading day in the latest 3 months compared to last year, **unadjusted value** sales were up +1.8%.

Unadjusted volume sales were down -7.1%. **Prices** were up +9.5%.

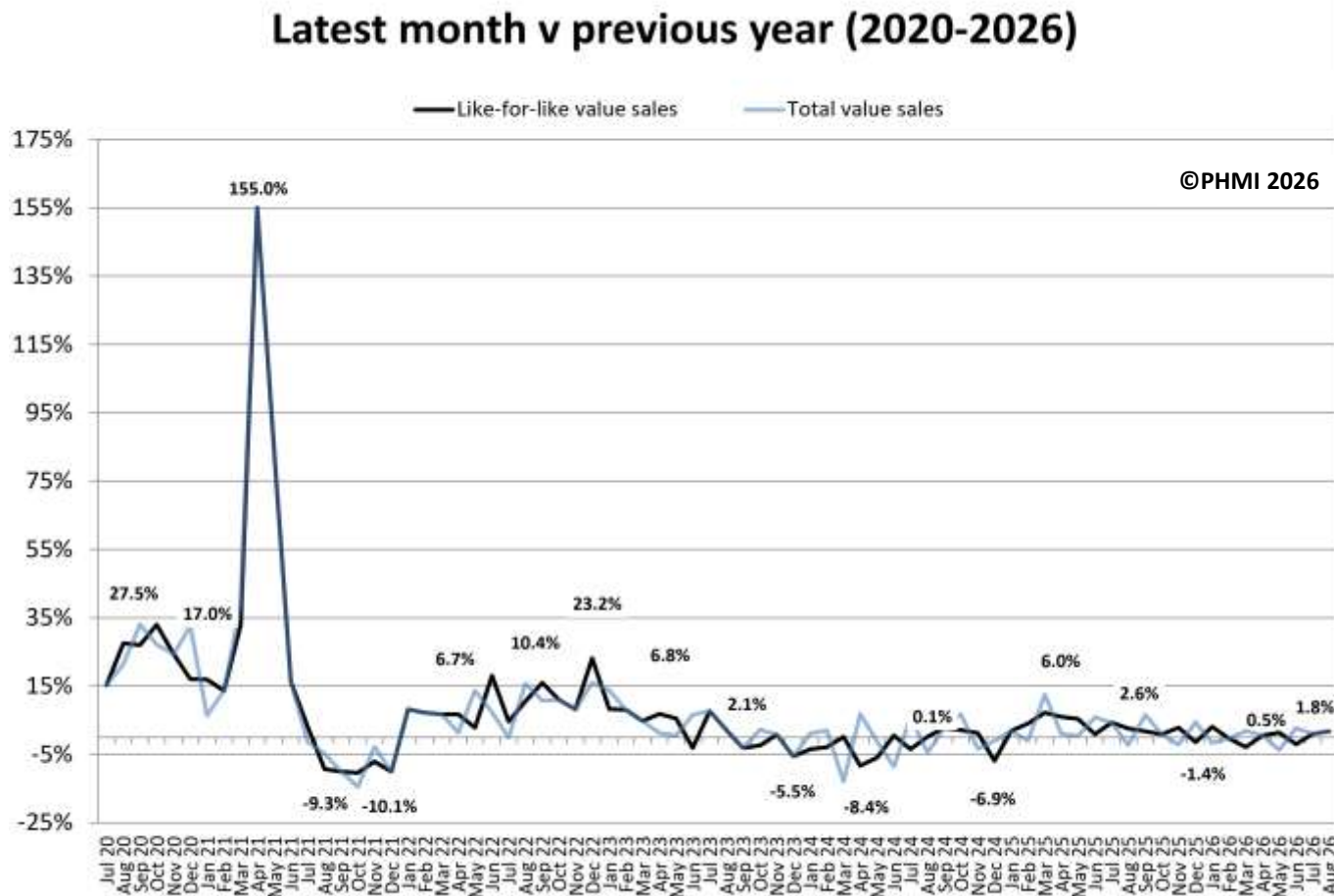
Latest month v previous year (2020-2026)

Like-for-like value sales and Total value sales % change



20 trading days this month v 20 trading days last year*

Like-for-like sales are adjusted to remove the effect of trading day differences.



NIQ **GfK**
Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Like-for-like value
sales were up +1.8% in
August v August 2025.

Like-for-like volume
sales were down -5.4%
with **prices** up +7.6%.

With no difference in
trading days,
unadjusted value sales
were up
+1.8%. Unadjusted
volumes were down
-5.4% but prices
increased +7.6%.

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

Latest month v previous month (2020-2026)

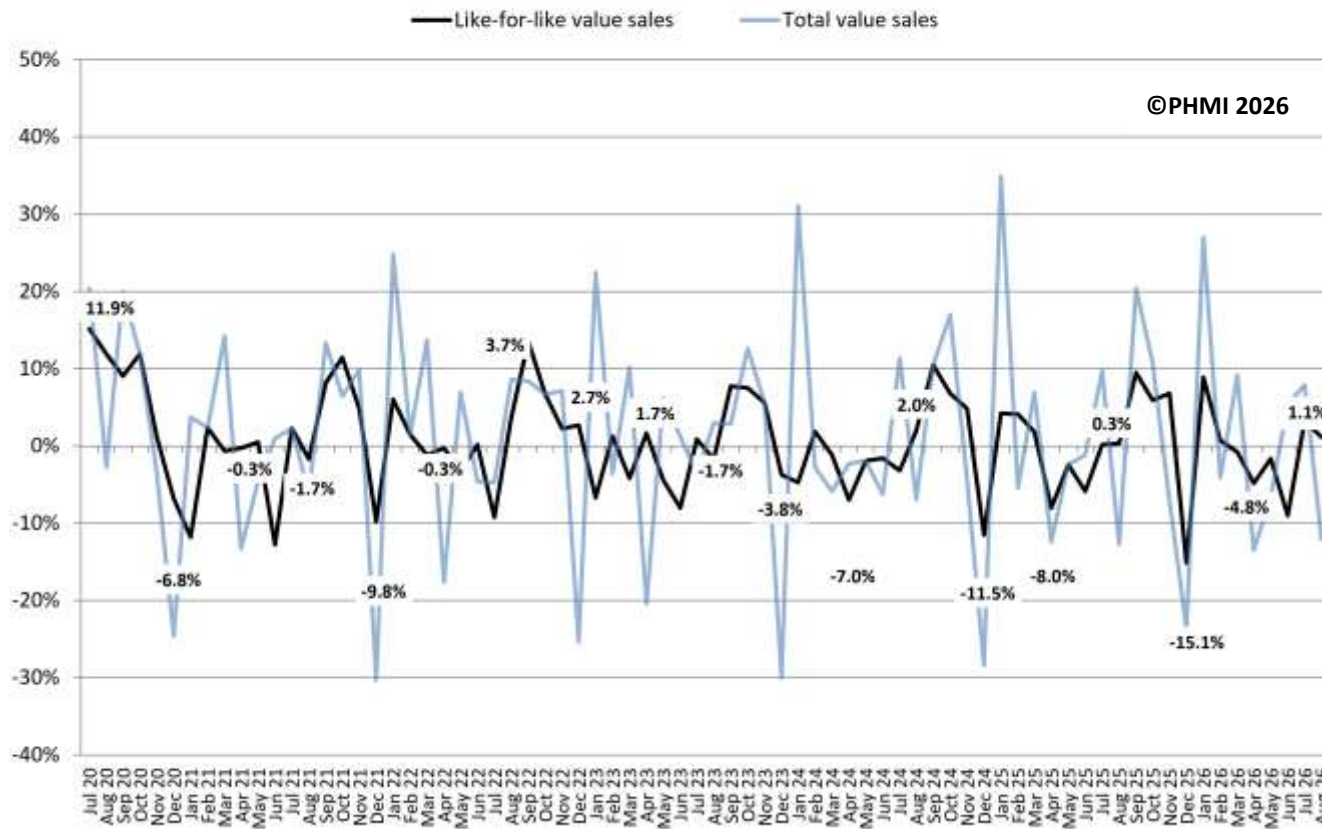
Like-for-like value sales and Total value sales % change



20 trading days this month v 23 trading days last month.*

Like-for-like sales are adjusted to remove the effect of trading day differences.

Month v previous month (2020 -2026)



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Like-for-like value
sales were up +1.1%
August v July 2026.
Like-for-like volume
sales were up +1.6%,
but prices fell -0.5%.

With three fewer
trading day this month,
unadjusted value sales
were down -12.0%.
Unadjusted volume
sales were down
-11.6% while prices
fell -0.5%.

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

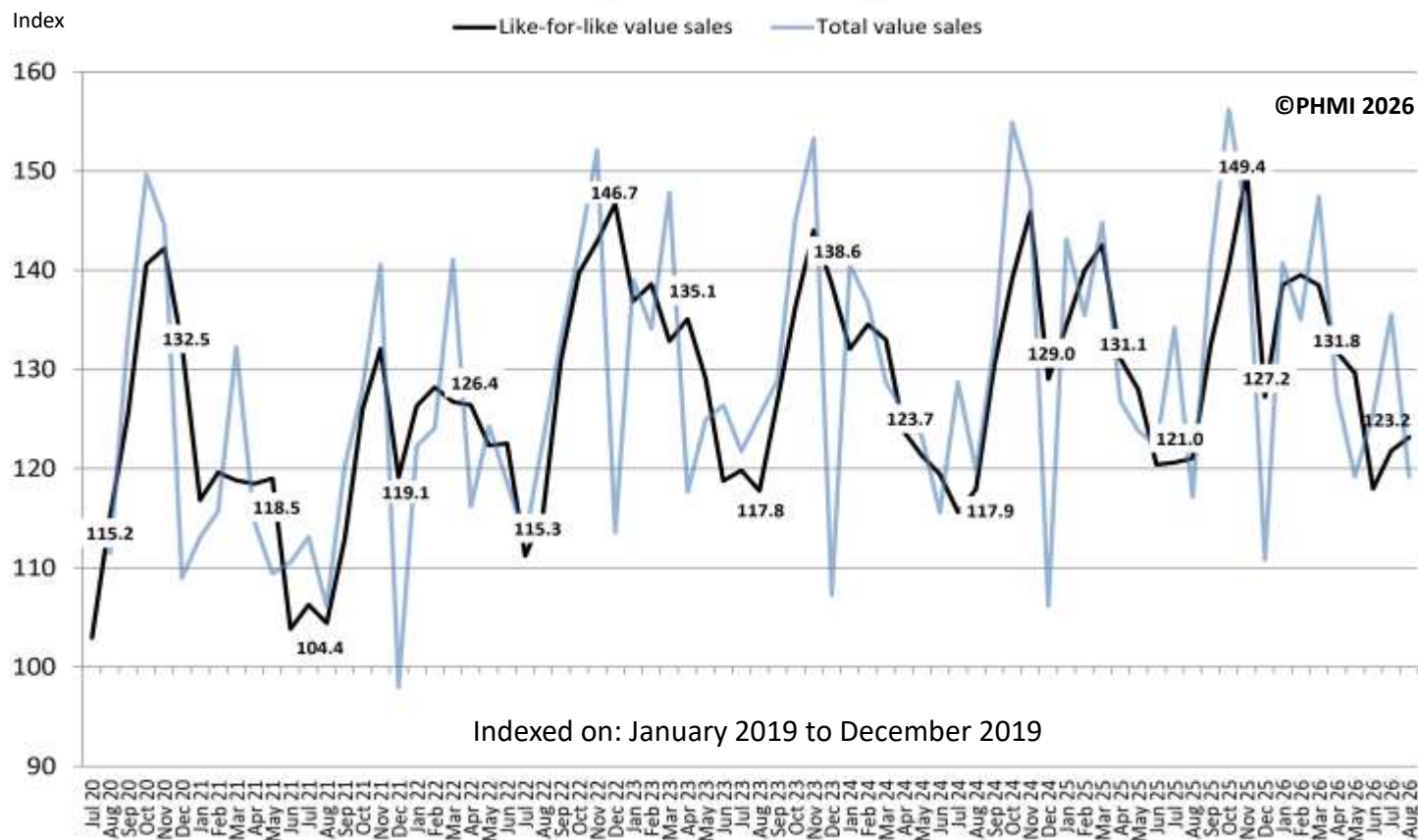
Monthly: Index (2020-2026)

Like-for-like value sales and Total value sales index

20 trading days this month v 21 trading days in the Index base period.*
Like-for-like sales are adjusted to remove the effect of trading day differences.



Indices: July 2020 to August 2026



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

August's PHMI **like-for-like value sales** Index was 123.2.

With one less trading day this month versus the Index base period, the Unadjusted value Index was 119.2.

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

Latest 3 months v previous year

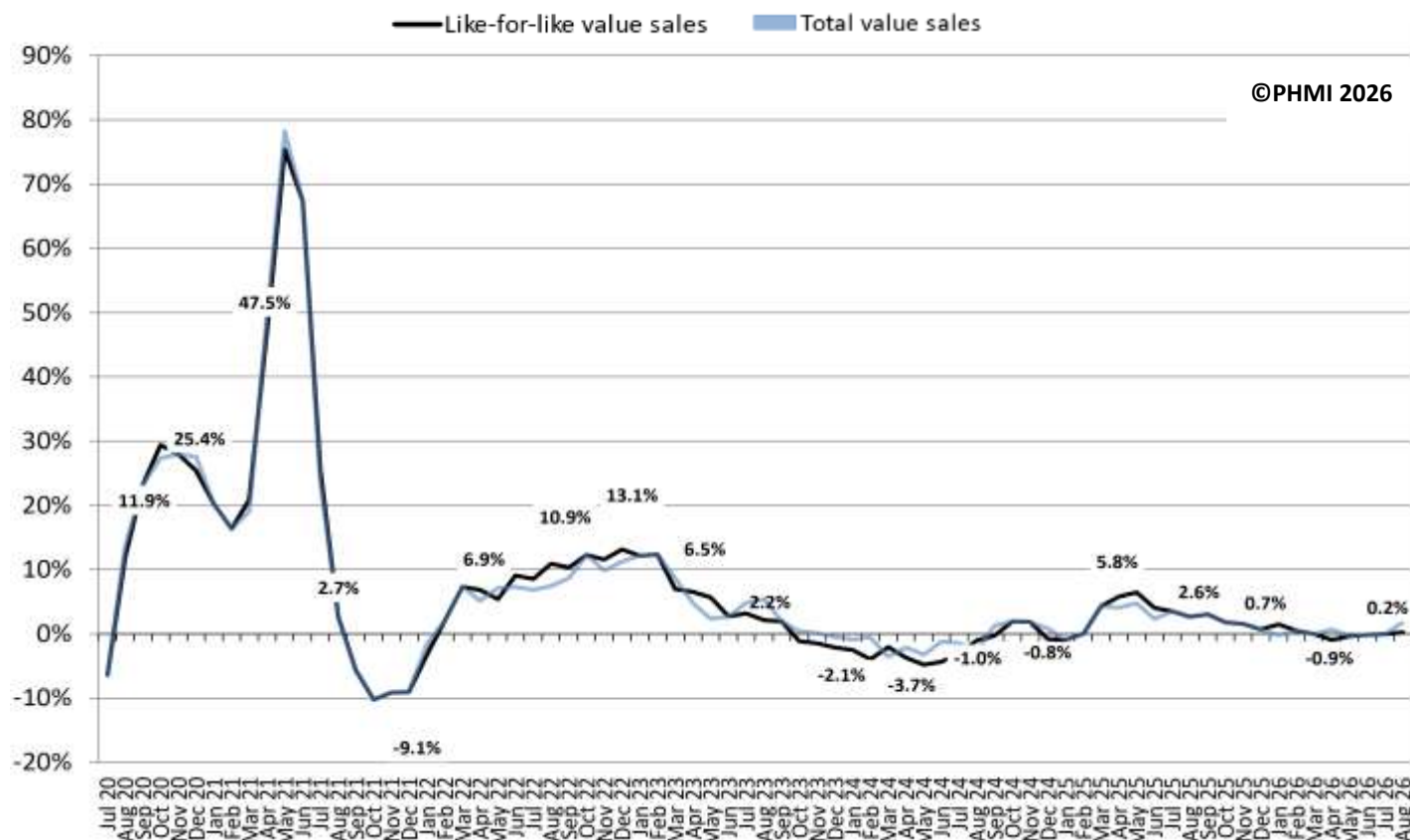
Like-for-like value sales and Total value sales % change

65 trading days this period compared v 64 this period last year

Like-for-like sales are adjusted to remove the effect of trading day differences.



Latest 3 months v last year



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Like-for-like value sales in the 3 months June to August 2026 were up +0.2% v the same period last year. **Like-for-like volume sales** were down -8.5%. **Prices** rose +9.5%.

With one more trading day, **unadjusted value sales** were up +1.8%. **Unadjusted volumes** were down -7.1%.

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

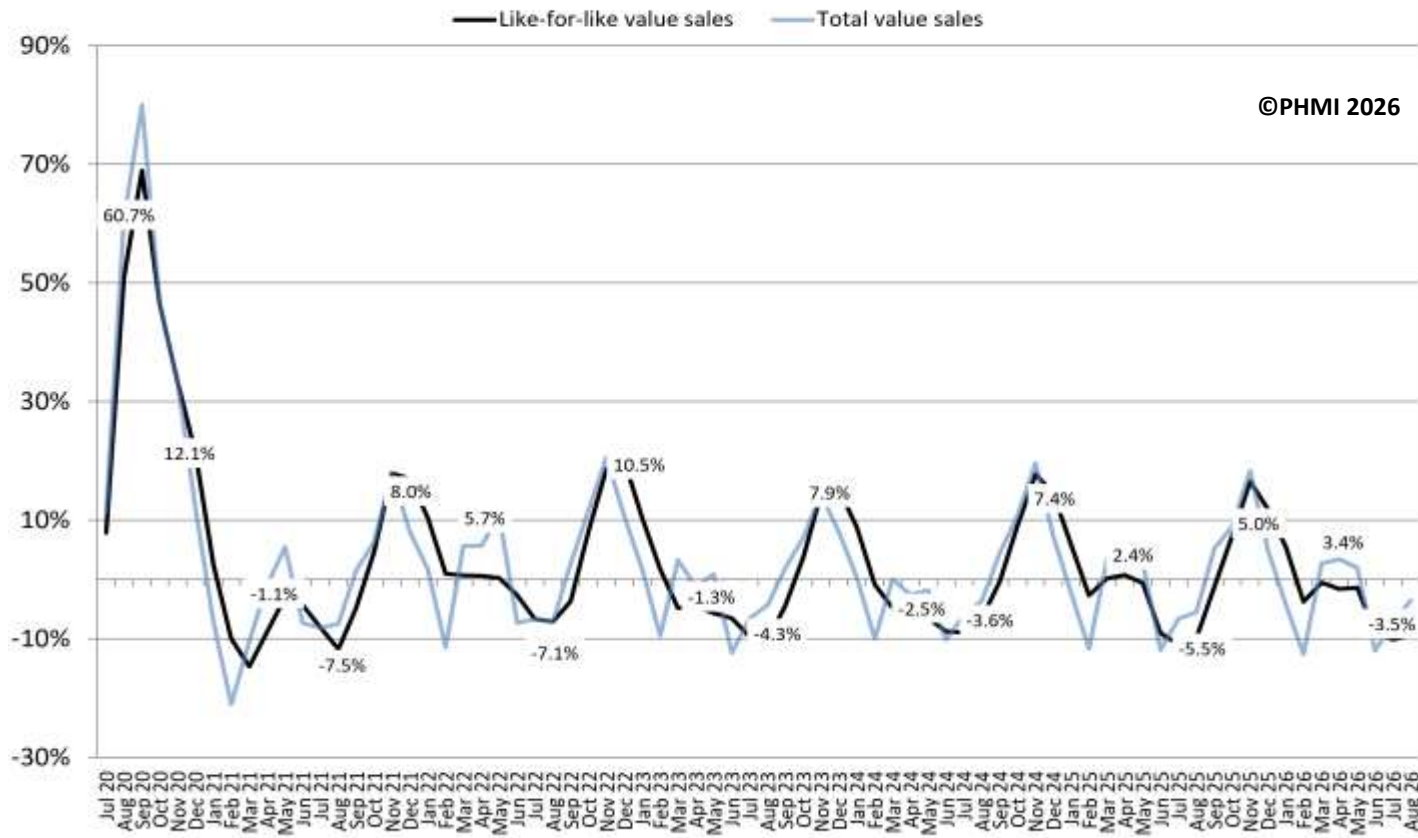
Latest 3 months v previous 3 months

Like-for-like value sales and Total value sales % change

65 trading days this recent period v 61 trading days in the previous period.*
Like-for-like sales are adjusted to remove the effect of trading day differences.



Latest 3 months v previous 3 months



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Like-for-like value sales fell -9.4% in 3 months June 2026 to August 2026 compared to the previous 3 months. **Like-for-like volume** sales were down -9.8%. **Prices** were up +0.4%.

With 4 more trading days in the most recent period, unadjusted value sales were down -3.5%. Unadjusted volume sales were down -3.9% but prices up +0.4%.

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

Latest 12 months v previous 12 months

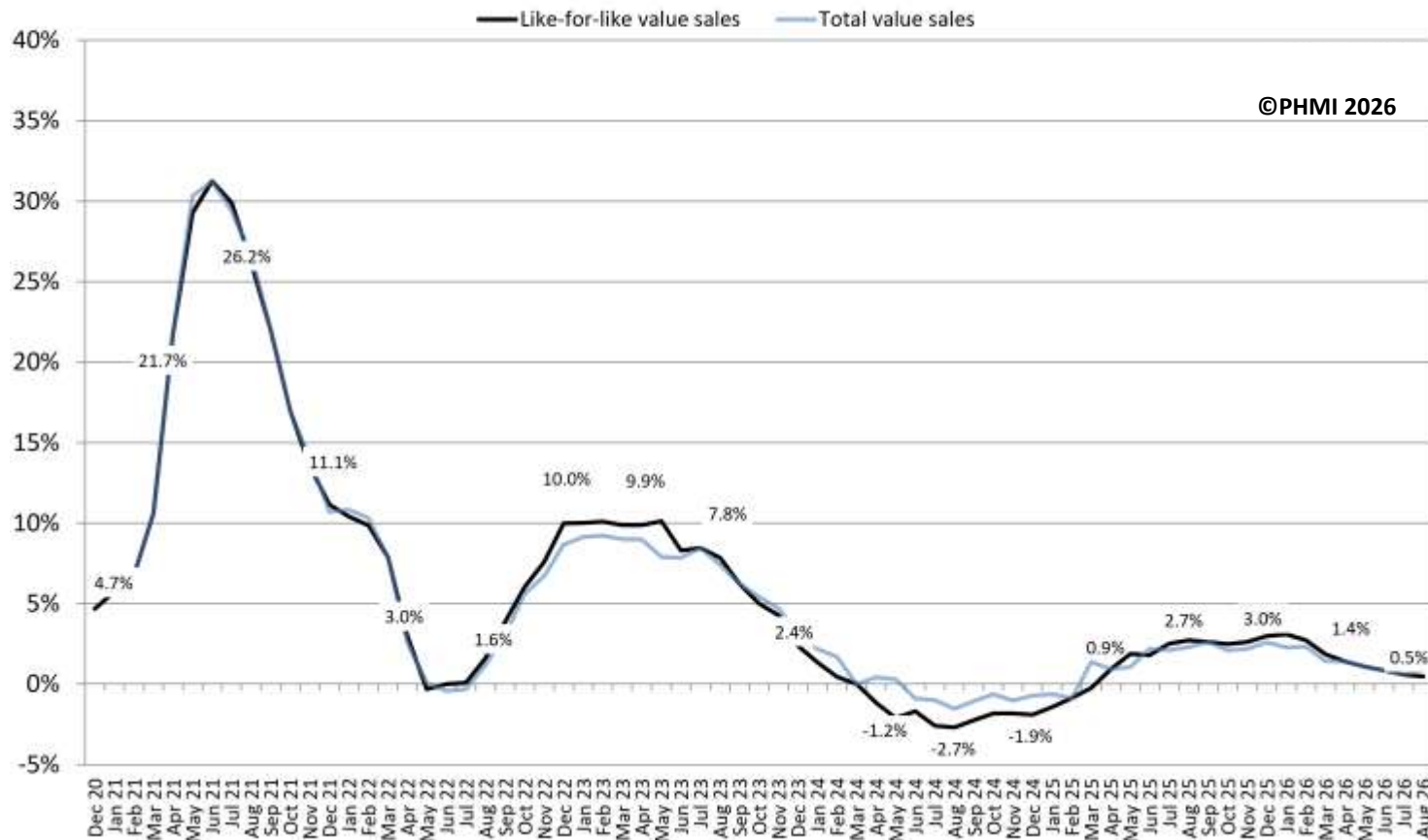
Like-for-like value sales and Total value sales % change

250 trading days this year v 249 trading days last year.

Like-for-like sales are adjusted to remove the effect of trading day differences.



Latest 12 months v previous 12 months



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Like-for-like value sales were up +0.5% September 2025 to August 2026 v the same period 12 months before. **Like-for-like volume** sales were down -5.1%. Prices were +5.9% higher.

With one more trading day this period, **unadjusted value sales** were up +0.9%, **unadjusted volume sales** down -4.7% but prices were up 5.9%.

Year-to-date v last year

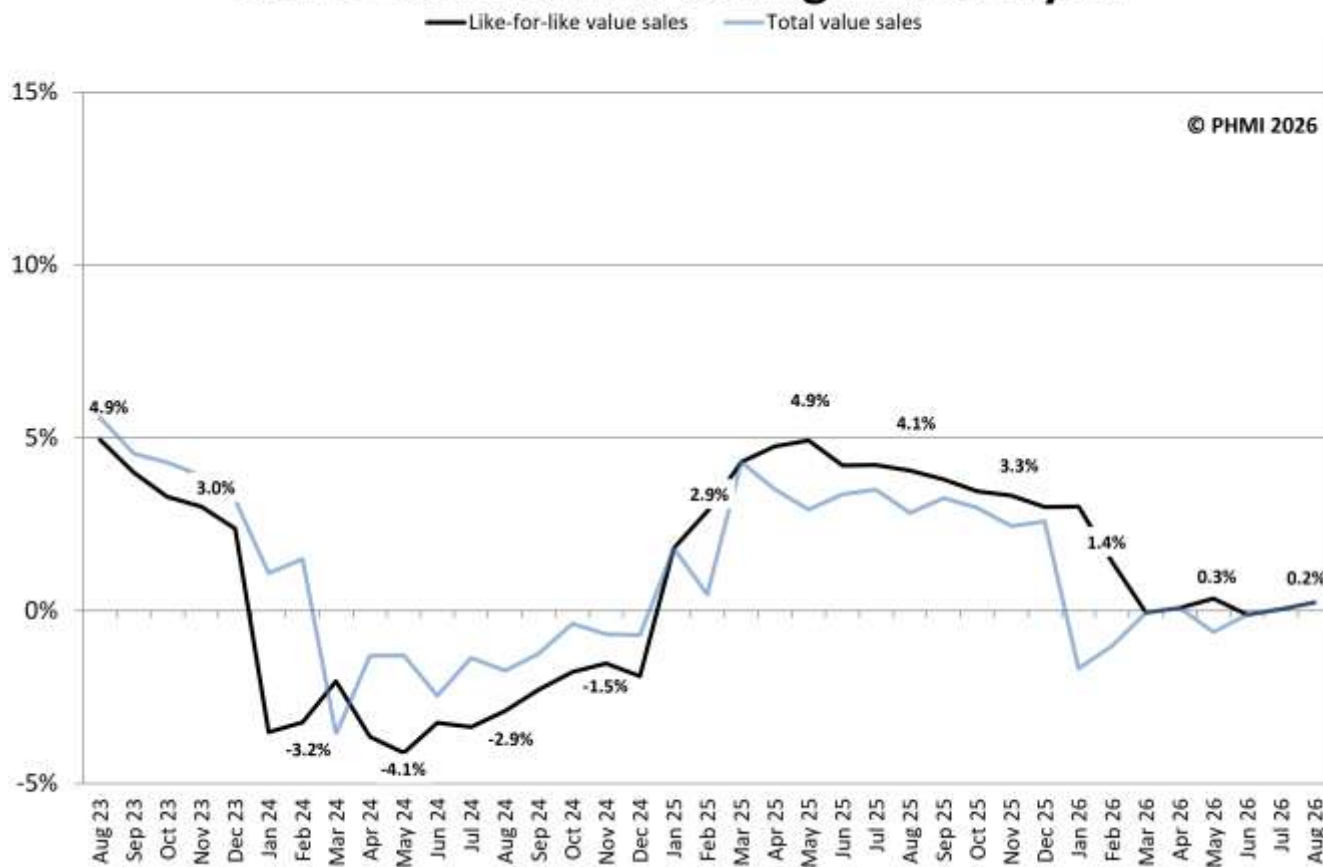
Like-for-like value sales and Total value sales % change

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

Like-for-like sales are adjusted to remove the effect of trading day differences.



Year to date: Jan 26 to Aug 26 v last year



NIQ GfK

Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Like-for-like value sales were up +0.2% in January to August 2026 v same period last year. **Like-for-like volume** sales were down -6.3%. **Prices** were up +6.9%.

With no difference in trading days this period, **unadjusted value** sales were also up +0.2% and **unadjusted volume** sales down -6.3%.

PHMI Trading Days



Source: GfK's Builders Merchants
Total Category Report: January
2019 to August 2026

Monthly

Index: 20.7

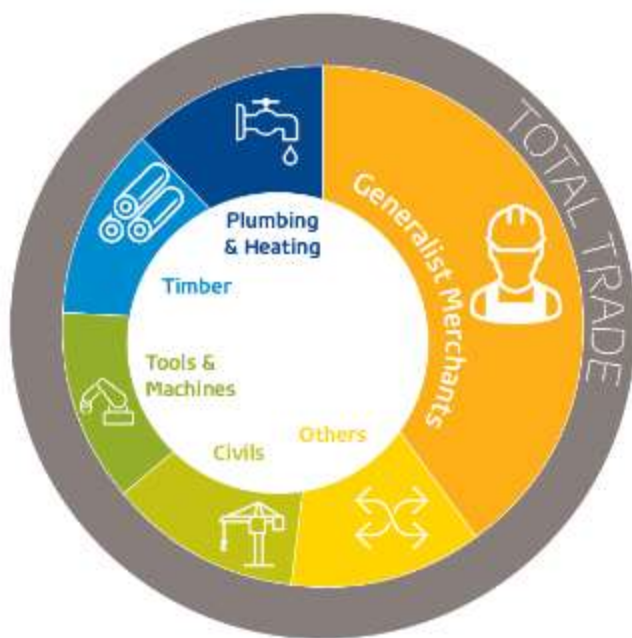
2024											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	21	20	21	21	20	23	21	21	23	21	17
2025											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
22	20	21	20	20	21	23	20	22	23	20	18
2026											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
21	20	22	20	19	22	23	20				

Quarterly

Index: 62.0

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	65	61	124	126	250
2026				2026		2026
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

Plumbing & Heating
Merchant Index 



Contacting PHMI



PHMI Experts

Plumbing & Heating brands who are interested in becoming PHMI Experts to speak for their markets and build their brands should contact Callum Budd:

As Research Director at MRA Research, Callum also focuses on the building materials, built environment, and building tech sectors, helping brands to better understand their customers, navigate market challenges and seize growth opportunities. He is passionate about delivering high-quality research, strong client relationships, and leading teams to achieve impactful results.



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More data available

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