

“building **excellence**
in materials supply”

Builders Merchant Building Index



Monthly report for October 2019

Building the Industry & Building Brands from Knowledge



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Quarterly reports contain additional analysis, macro-economic factors and expert comments. Click the images below to read or download the Q3 report.

Introduction



This Builders Merchant Building Index (BMBI) report contains data from GfK's ground-breaking Builders Merchants Panel, which analyses data from over 80% of generalist builders' merchants' sales throughout Great Britain. GfK's Builders Merchant Point of Sale Tracking Data sets 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 merchants to builders and other trades. It's therefore a very good proxy for housing RMI.

BMBI trend data is indexed on the 12 month period July 2014 to June 2015. The monthly series tracks what is happening in the market month by month and includes an in-depth review every quarter. This trend series gives the industry access to far more accurate and comprehensive insights than that available to other construction sectors. BMBI data is highlighted by the Department for Business, Energy & Industrial Strategy in its monthly construction update, alongside the ONS, CPA, Experian, IHS Markit and the Bank of England.

MRA Marketing produces the Builders Merchant Building Index, a brand of the BMF, to communicate to the wider market as the voice of the industry as well as the voice of individual Expert Brands: The Crystal Group, Keylite Roof Windows, Timbmet, Alumasc Water Management Solutions, Hanson Cement, IKO PLC, Keystone Lintels, Knauf Insulation, Encon Insulation, Ibstock, Talasey Group, Heatrae Sadia, Dulux Trade and Lakes, who provide valuable commentary on market trends and influences.

Further recognition for BMBI

One of the aims of BMBI is to reach across and beyond construction. It's now syndicated to a growing number of trade magazines in different sectors on a regular basis. Outside the industry, economists, banks, consultancies, investment bodies and the big accountants regularly refer to it and BMBI is referenced alongside the Office for National Statistics (ONS) data in the Government Department for Business, Energy and Industrial Strategy (BEIS) monthly construction update. In addition, the Sunday Times sought BMBI Experts in February for a contribution to a review on preparations for Brexit. This August, BBC News contacted one of the BMBI Experts and MRA on the same subject.

More data available

This BMBI report provides valuable top-level indices but there's considerably more data available. GfK insights go much deeper and include sales value data. GfK 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 also produce robust like-for-like market comparability tailored to the requirements of an individual business. As more merchants join to submit their monthly sales-out data the quality of this information can only become more extensive and rigorous. 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

Merchants' October sales remain subdued

After a strong start to the year, the uncertain economic climate has continued to impact negatively on merchants' sales into October 2019.

Year-on-Year

Total Builders Merchants' sales in October were down 4.4% compared with the same period in 2018, on an equal number of trading days. The best performing sectors in October were Workwear & Safetywear (+9.0%) and Kitchens & Bathrooms (+4.1%), with Plumbing, Heating & Electrical (+0.3%) also showing marginal growth.

Among categories with a weaker performance were Tools (-9.2%) and Timber & Joinery (-7.2%). Landscaping (-5.4%) and Heavy Building Materials (-4.9%) also performed less well year-on-year.

Month-on-Month

The picture was more positive month-on-month, as total October 2019 sales were up by 6.0% compared with September. However, when adjusted for the two-day trading difference, sales were down 3.2%.

Most product categories saw relatively strong growth month-on-month, including Workwear & Safetywear (+21.4%), Plumbing, Heating & Electrical (+13.5%) and Tools (11.8%) and Ironmongery (9.3%). Timber & Joinery (+6.8%) and Heavy Building Materials (+5.7%), the largest categories, also saw sales increase on an unadjusted basis, but not in terms of average sales a day.

Other periods

Sales in the rolling 12 months November 2018 to October 2019 were up 0.5% on the same period last year. Year-to-date sales also remained positive but was down to 0.5% compared with the same time last year.

Index

October's BMBI index was 126.0, with Plumbing, Heating & Electrical the highest at 141.5.

Total Builders Merchants sales in October 2019 were down 4.4% compared with the same period in 2018.

The Expert Panel

Speaking for their markets - 1



The Builders Merchant Building Index (BMBI) includes a growing panel of industry Experts. In each quarterly report they comment on the market, with a particular focus on the story behind the trends. Experts are leading brands, or brands aspiring to become leaders, who are the voice of their markets.

The Q3 2019 report, which includes commentary from our experts is available [here](#)

Meet the Builders Merchant Building Index Experts:



Kevin Morgan
Group Commercial Director
The Crystal Group



Expert for PVC-U Windows & Doors

[Read latest Comment: Q3 2019 Report](#)



John Coe
Commercial Director
Alumasc Water Management Systems



Expert for Civils, Metal Rainwater & Drainage

[Read latest Comment: Q3 2019 Report](#)



John Duffin
Managing Director
Keylite Roof Windows



Expert for Roof Windows

[Read latest Comment: Q3 2019 Report](#)



Andrew Simpson
National Commercial Director
Hanson Cement



Expert for Cement & Aggregates

[Read latest Comment: Q3 2019 Report](#)



Nigel Cox
Managing Director
Timbmet



Expert for Timber & Panel Products

[Read latest Comment: Q3 2019 Report](#)



Paul Owen
Commercial Director Distribution
IKO PLC



Expert for Roofing Products

[Read latest Comment: Q3 2019 Report](#)

The Expert Panel

Speaking for their markets - 2



Derrick McFarland
Managing Director
Keystone Lintels

Expert for Steel Lintels



[Read latest Comment: Q3 2019 Report](#)



Simon Taylor
Director of Sales – Builders Merchants
Ibstock

Expert for Bricks



[Read latest Comment: Q3 2019 Report](#)



Neil Hargreaves
Managing Director
Knauf Insulation

Expert for Mineral Wool Insulation



[Read latest Comment: Q3 2019 Report](#)



Jeff House
Head of External Affairs
Baxi Heating UK (incorporating Heatrae Sadia)

Expert for Water Heating



[Read latest Comment: Q3 2019 Report](#)



Mike Beard
Merchant Development
Director
Encon Insulation

**Expert for Insulation Products -
Distribution**



[Read latest Comment: Q3 2019 Report](#)



Malcolm Gough
Group Sales & Marketing
Director
Talasey Group

**Expert for Natural Stone
Landscaping Products,
Vitrified Paving & Artificial Grass**



[Read latest Comment: Q3 2019 Report](#)



Paul Roughan
Trade Merchants Sales Director
Dulux Trade

Expert for Paint



[Read latest Comment: Q3 2019 Report](#)



Mike Tattam
Sales & Marketing Director
Lakes

**Expert for Shower Enclosures and
Showering**



[Read latest Comment: Q3 2019 Report](#)

Monthly: Index and Categories

October 2018* – October 2019

(Indexed on monthly average, July 2014 – June 2015)



		2018			2019									
MONTHLY SALES VALUE INDEX	Index	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct
Total Builders Merchants	100	131.8	122.5	77.4	107.8	108.7	121.9	122.0	129.3	117.2	132.8	117.7	118.9	126.0
Timber & Joinery Products	100	137.2	126.8	79.9	114.7	112.2	123.3	122.3	127.9	118.3	130.9	117.0	119.3	127.4
Heavy Building Materials	100	132.4	121.8	75.6	106.6	108.1	121.2	121.1	129.2	116.2	132.5	117.3	119.1	125.9
Decorating	100	124.8	116.3	78.9	104.7	103.4	114.8	109.7	115.1	108.1	124.2	113.2	112.5	122.1
Tools	100	123.2	117.8	73.0	100.3	99.8	108.8	99.5	104.5	96.7	106.7	97.3	100.0	111.8
Workwear & Safetywear	100	123.5	129.5	79.9	111.5	96.8	101.5	95.5	100.1	99.3	108.8	95.5	110.9	134.6
Ironmongery	100	133.6	129.3	84.5	120.8	115.5	125.2	122.5	127.6	117.7	133.1	120.6	120.7	131.9
Landscaping	100	126.0	106.1	64.0	87.1	98.2	131.6	154.5	171.1	146.6	165.4	136.7	125.3	119.1
Plumbing, Heating & Electrical	100	141.1	146.5	96.9	130.8	125.7	131.2	117.6	120.2	109.7	123.8	111.8	124.6	141.5
Renewables & Water Saving	100	76.4	68.5	45.8	69.3	65.7	78.5	64.5	61.4	73.1	76.1	78.0	76.0	74.6
Kitchens & Bathrooms	100	122.5	128.2	81.2	109.5	115.3	122.8	115.2	116.5	112.7	129.2	116.4	118.5	127.6
Miscellaneous	100	126.3	119.1	85.1	122.7	111.6	115.1	113.6	122.5	113.7	135.8	118.5	128.0	131.6
Services	100	125.1	114.2	79.9	94.5	99.7	110.0	113.6	121.8	106.4	125.6	116.0	113.2	122.6

*Click the web link below to see the complete series of indices from July 2015.

NB: The April 2019 index for services has been updated following a data submission revision.

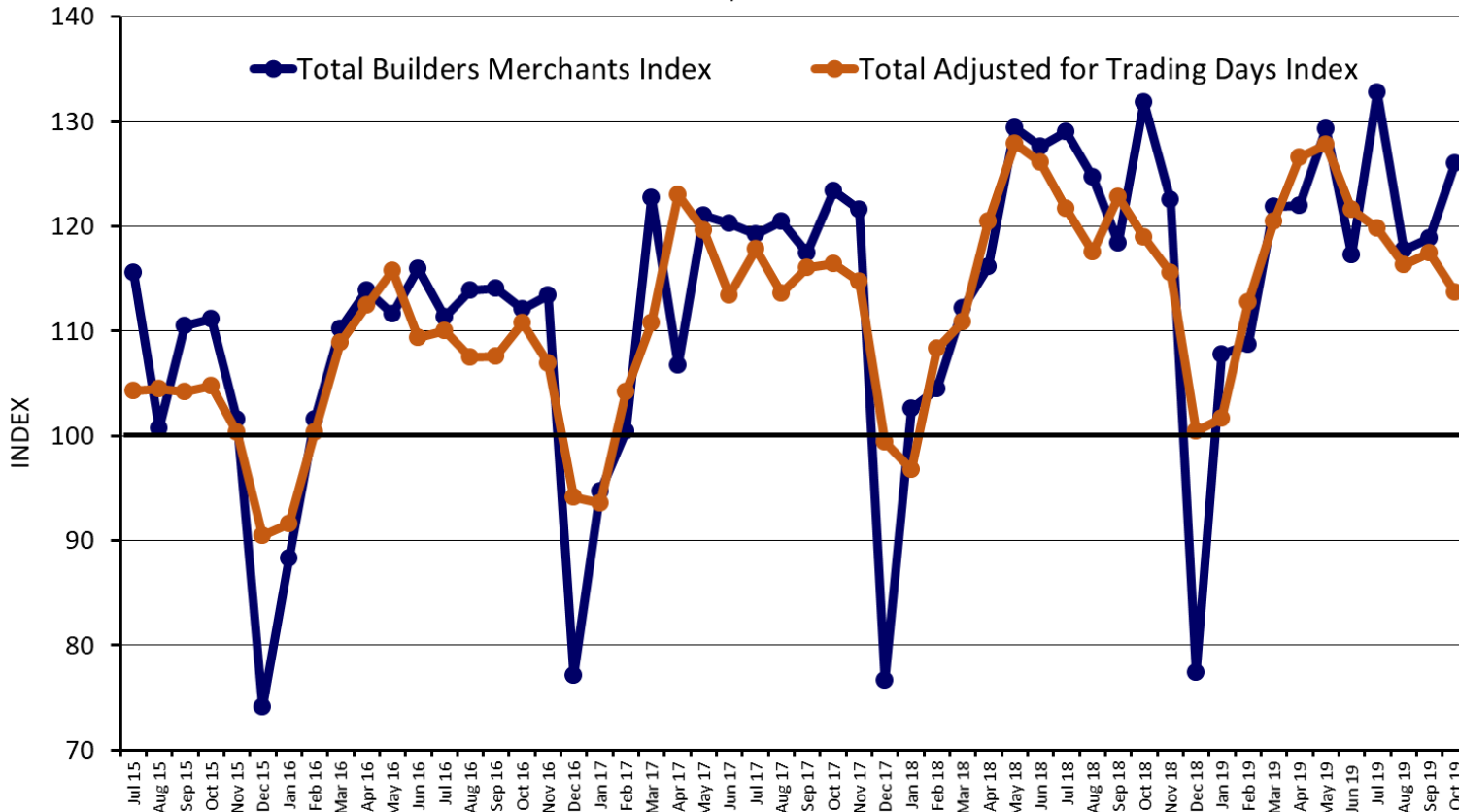
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: Index

Adjusted and unadjusted for trading days

Total Builders Merchants Index v Total Adjusted for Trading Days Index

Indexed on July 2014 - June 2015



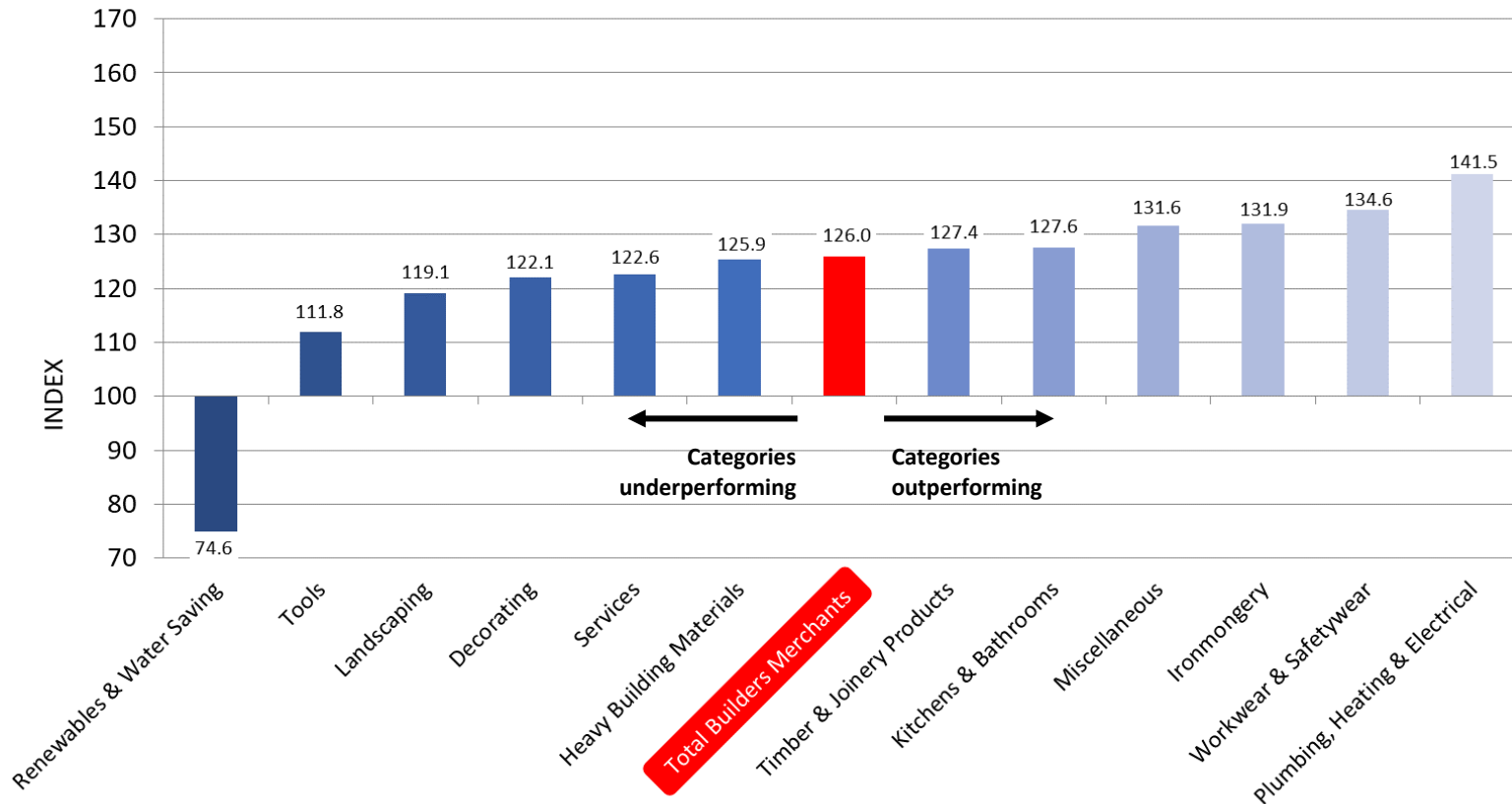
For number of trading days, see [Slide 35](#)

 Source: GfK's Builders Merchants Total Category Report July 2015 to October 2019

Monthly: Index and Categories

October 2019 index

October 2019 Index

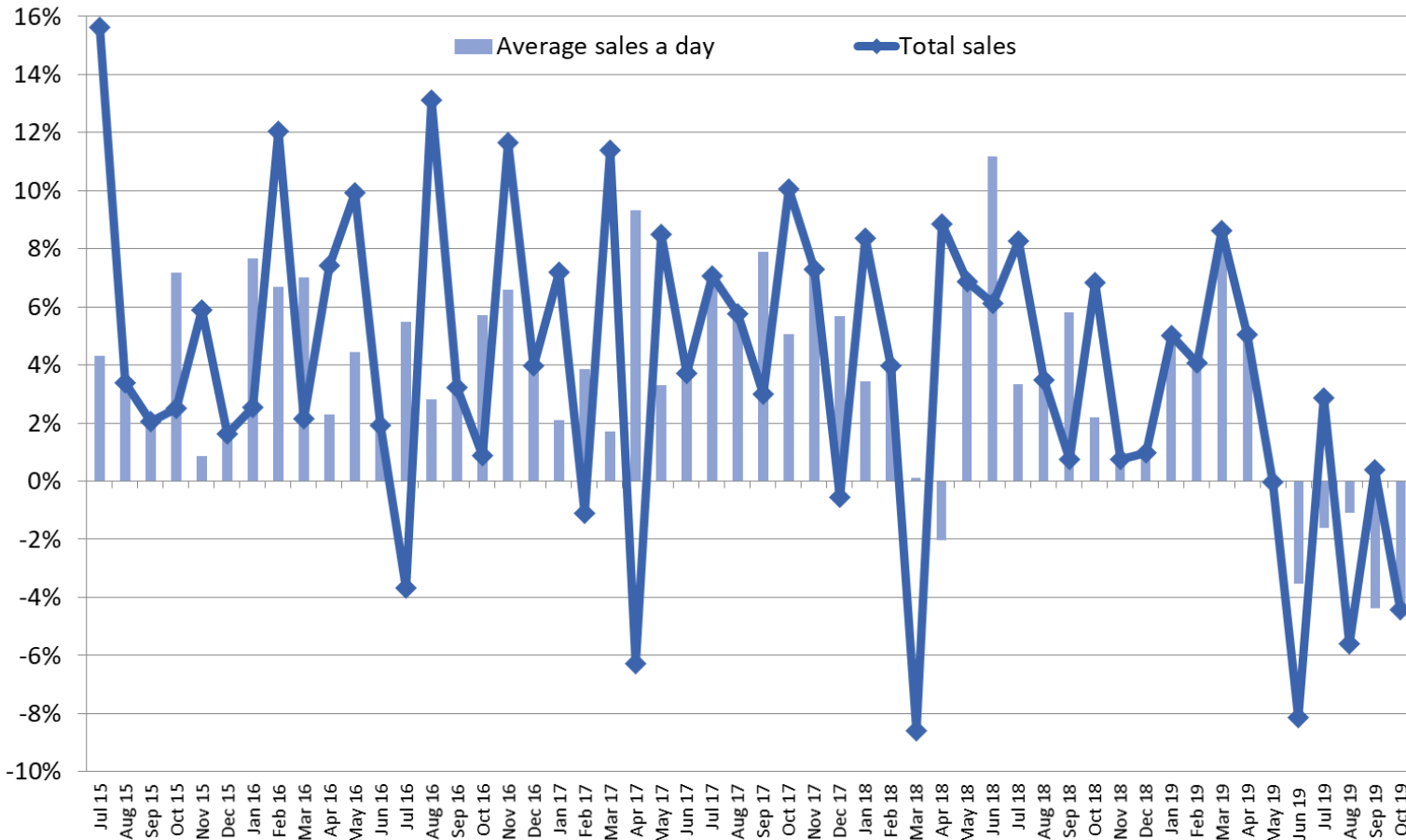


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: Sales Indices

Adjusted and unadjusted for trading days

Monthly: Year on Year



For number of trading days, see [Slide 36](#)

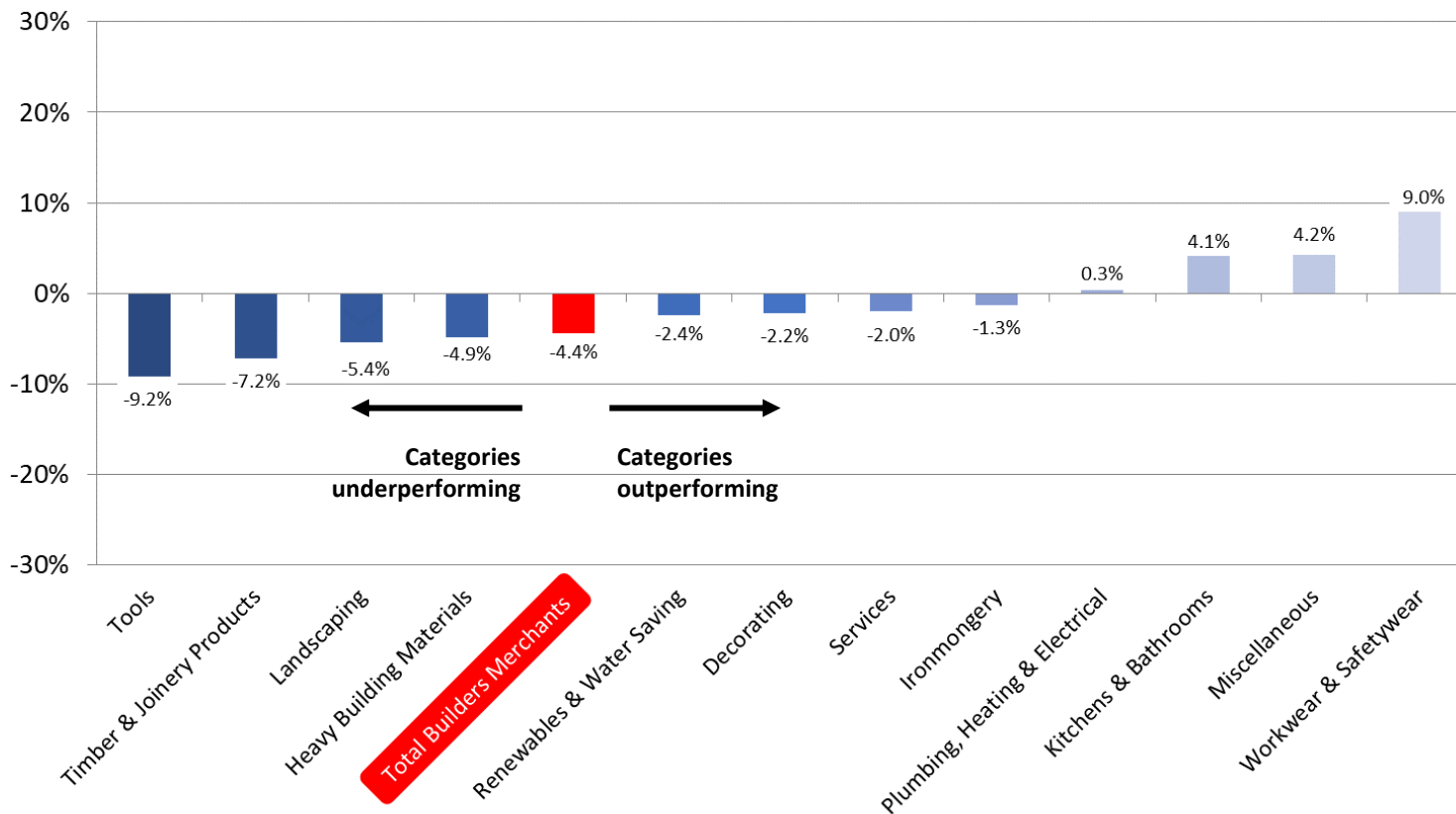
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: This Year v Last Year

October 2019 sales indices



October 2019 index v October 2018 index

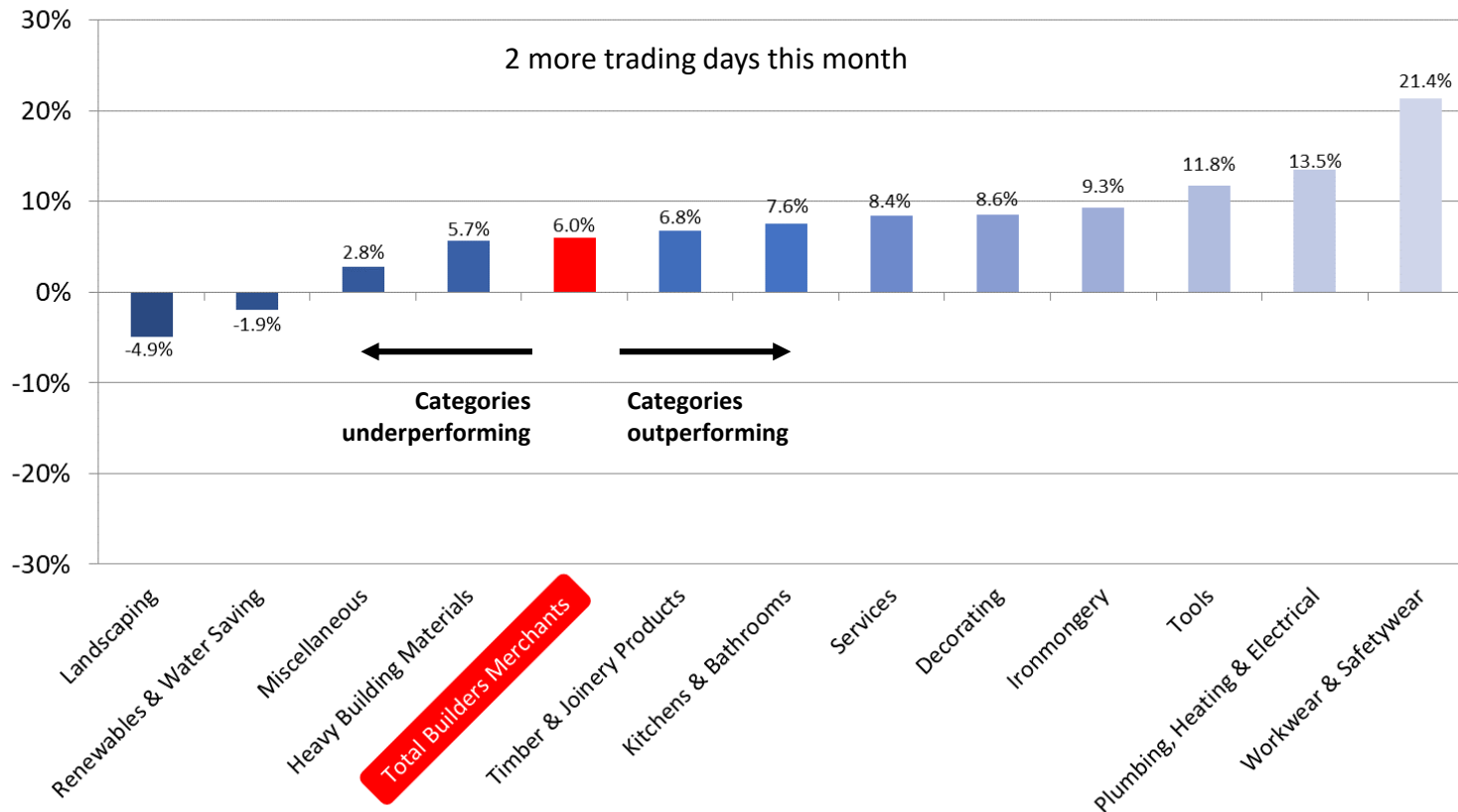


Source: GfK's Builders Merchants Total Category Report July 2015 to October 2019

Monthly: This Month v Last Month

October 2019 sales indices

October 2019 index v September 2019 index

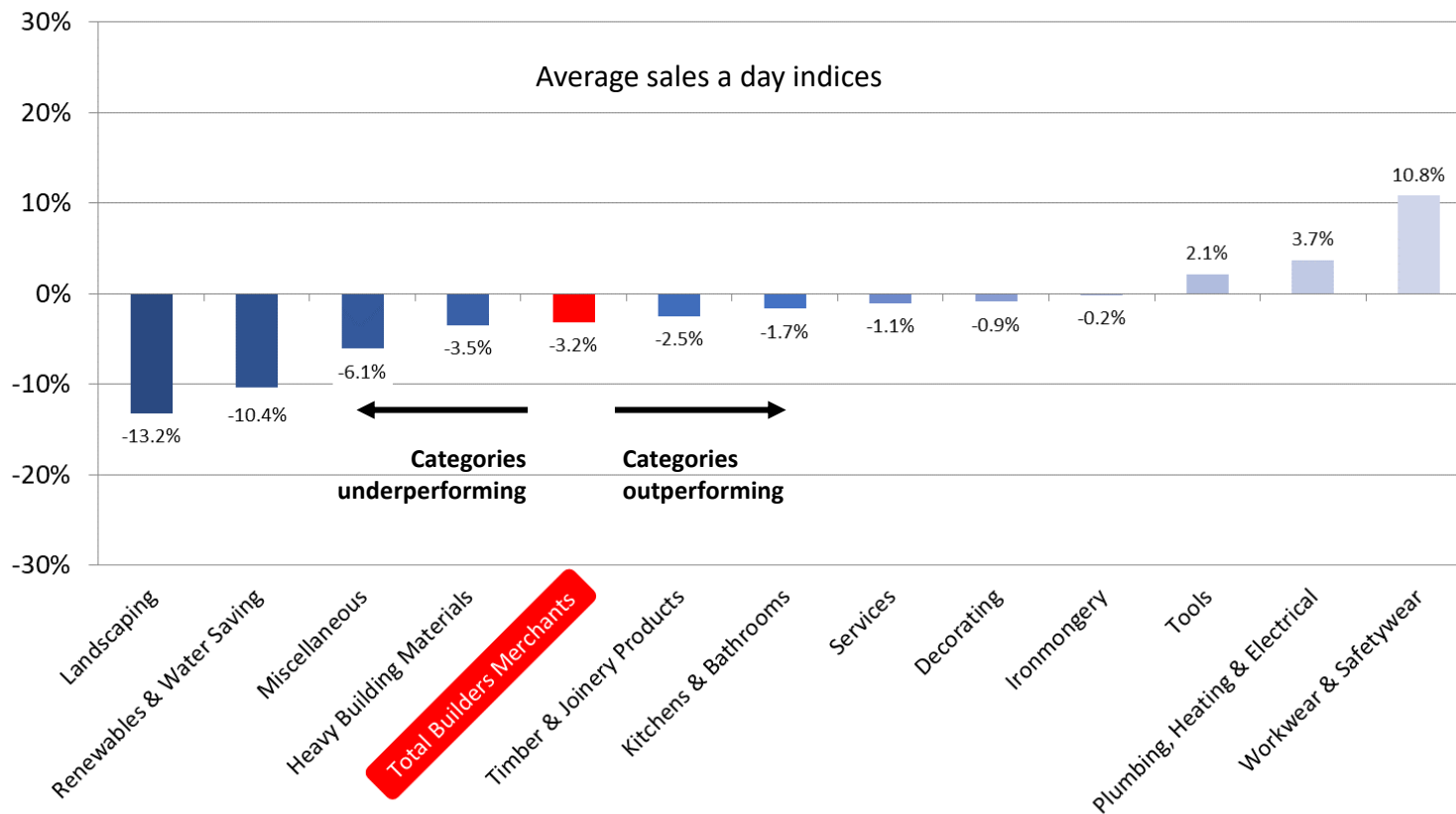


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: This Month v Last Month

October 2019 average sales a day indices

October 2019 index v September 2019 index



Source: GfK's Builders Merchants Total Category Report July 2015 to October 2019

Quarterly: Index and Categories

Quarter 3 2018* to Quarter 3 2019

(Indexed on July 2014 to June 2015)



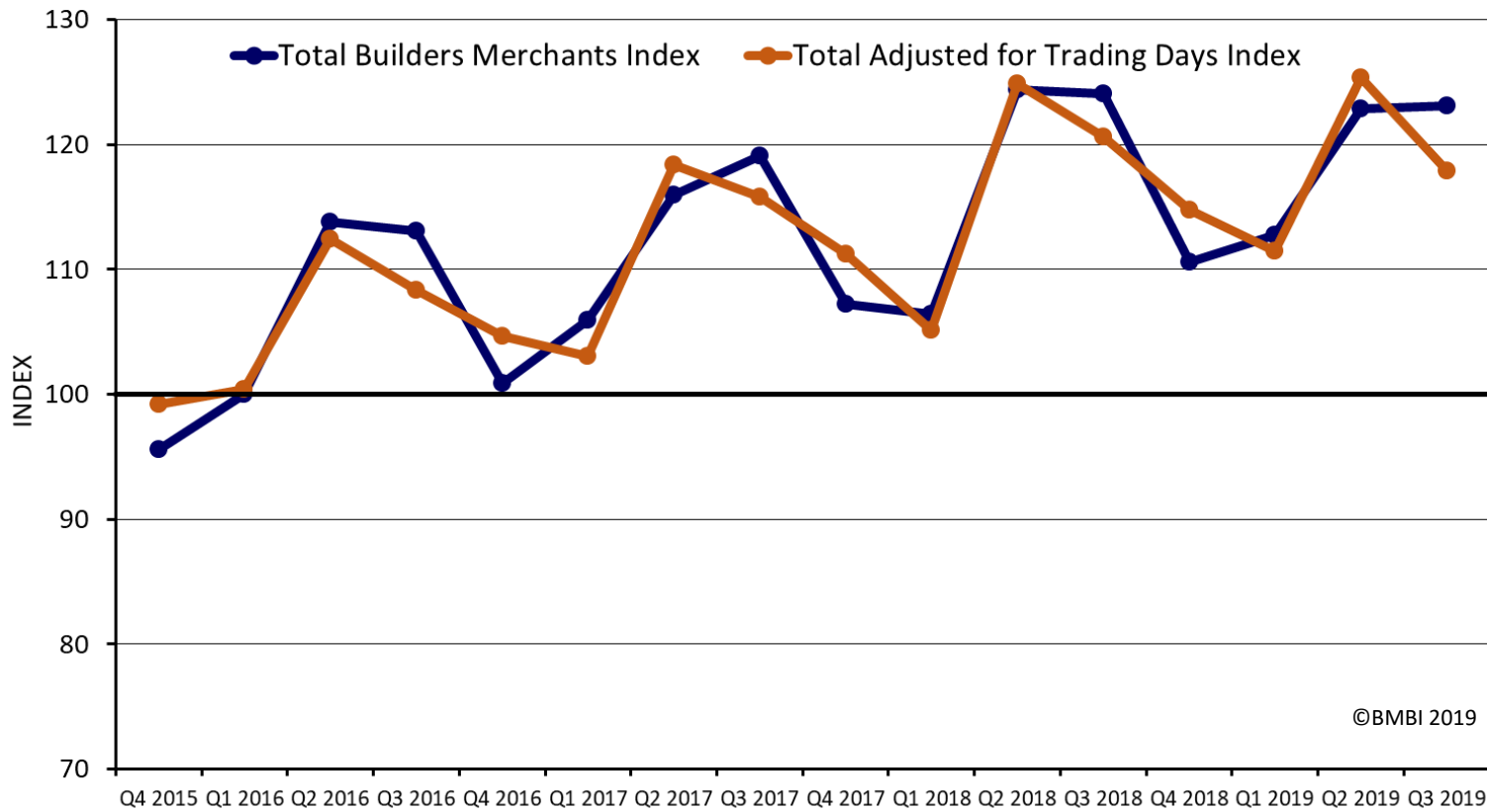
QUARTERLY SALES VALUE INDEX	Index	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019
Total Builders Merchants	100	124.0	110.6	112.7	122.9	123.1
Timber & Joinery Products	100	128.3	114.7	116.7	122.8	122.4
Heavy Building Materials	100	123.5	109.9	112.0	122.2	123.0
Decorating	100	116.5	106.5	107.5	111.0	116.6
Tools	100	110.1	104.7	103.0	100.2	101.4
Workwear & Safetywear	100	100.6	110.9	103.2	98.3	105.0
Ironmongery	100	123.7	115.8	120.5	122.6	124.8
Landscaping	100	140.6	98.7	105.6	157.4	142.5
Plumbing, Heating & Electrical	100	117.2	128.1	129.2	115.8	120.1
Renewables & Water Saving	100	68.7	63.6	71.2	66.3	76.7
Kitchens & Bathrooms	100	117.6	110.6	115.9	114.8	121.4
Miscellaneous	100	112.4	110.1	116.5	116.6	127.4
Services	100	116.1	106.4	98.8	113.9	118.3

*Click the web link below to see the complete series of quarterly indices from Q2, 2015.

Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Quarterly: Index

Adjusted and unadjusted for trading days



©BMBI 2019

 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

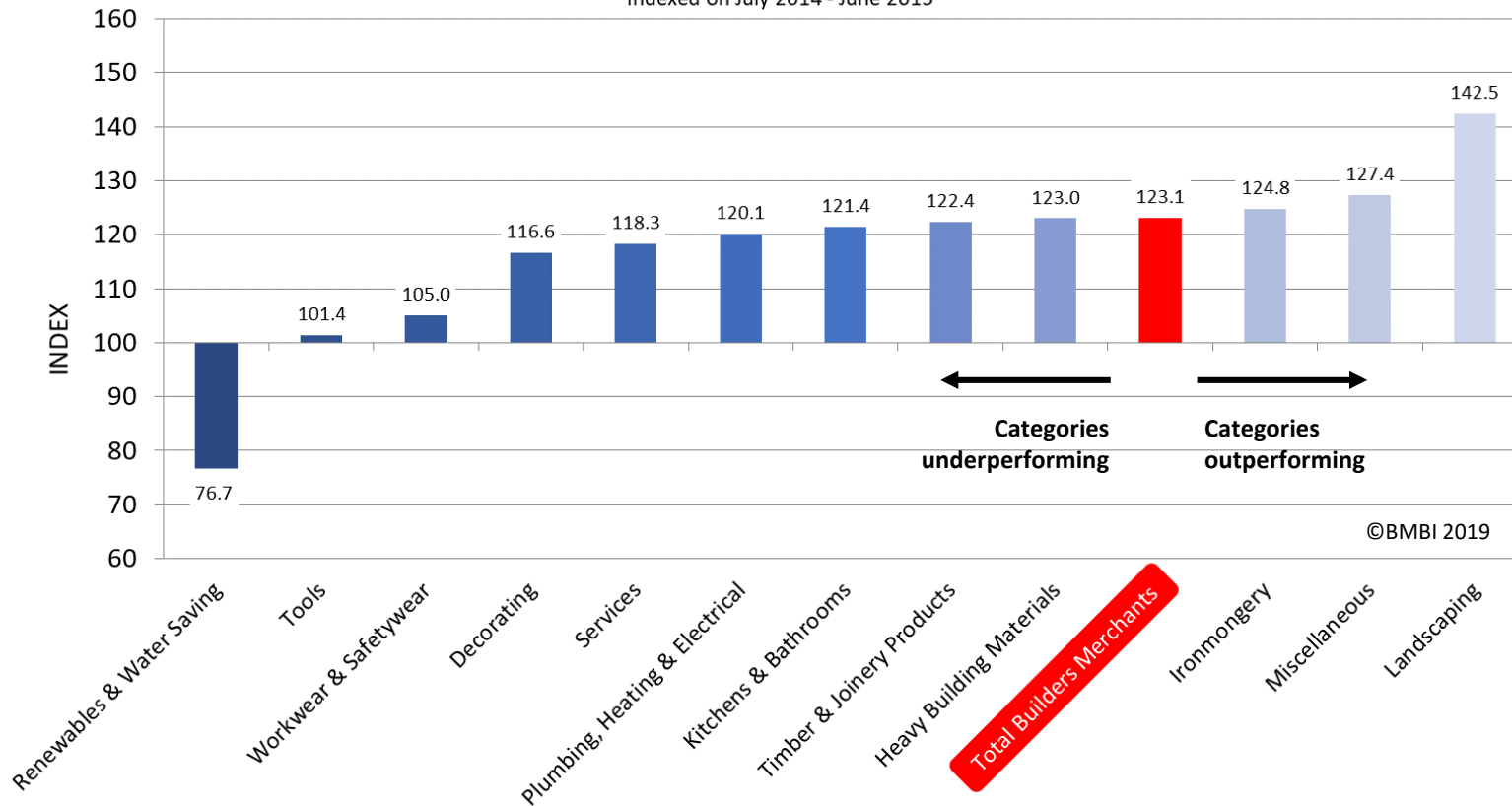
Quarterly: Index and Categories

Q3 2019 index



Quarter 3 2019

Indexed on July 2014 - June 2015



©BMBI 2019

GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

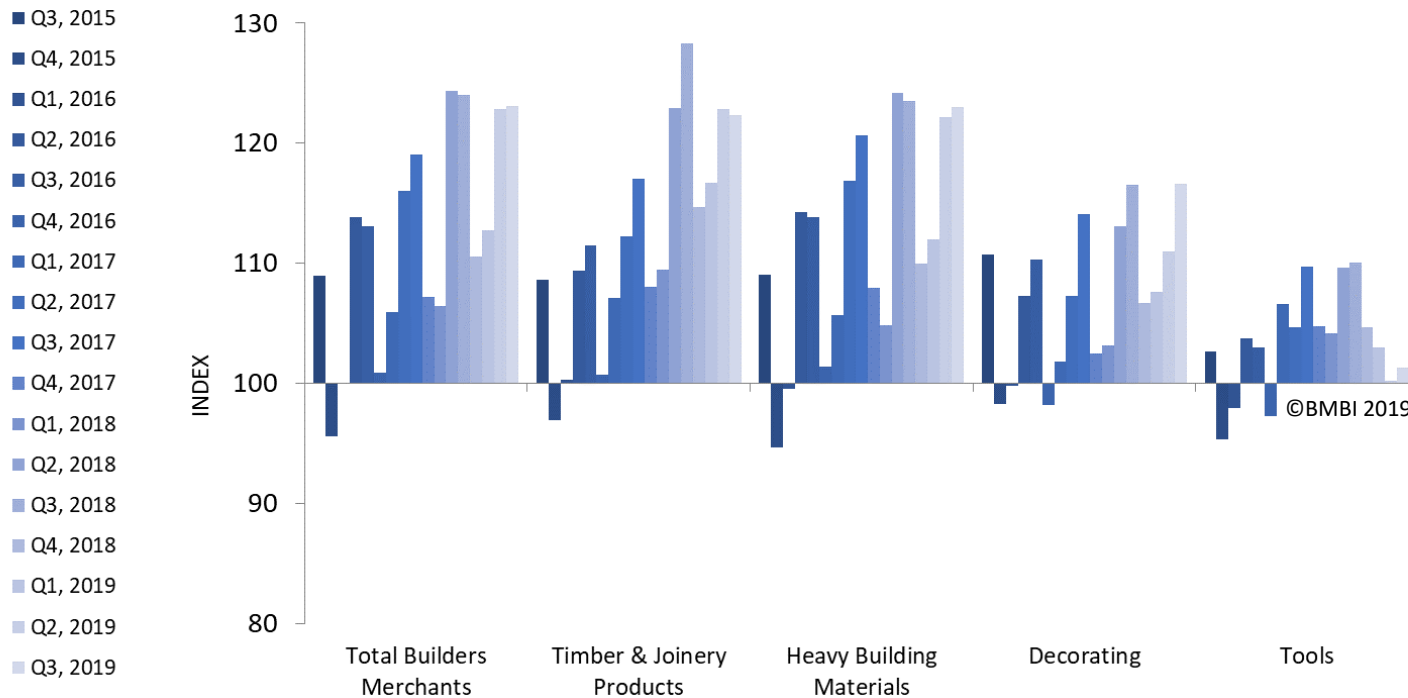
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices

Q3 2015 to Q3 2019



GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Indexed on July 2014 to June 2015

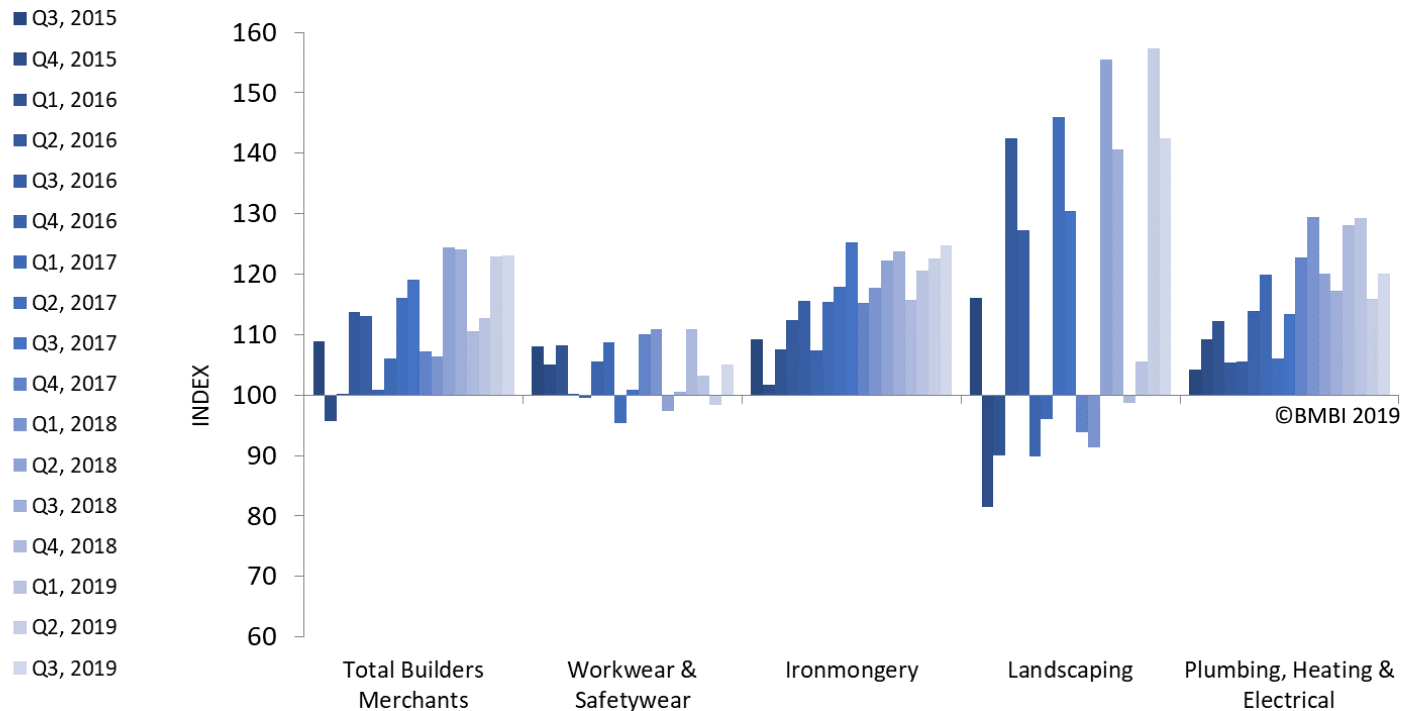
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices

Q3 2015 to Q3 2019



Source: GfK's Builders Merchants Total Category Report July 2015 to September 2019

Indexed on July 2014 to June 2015

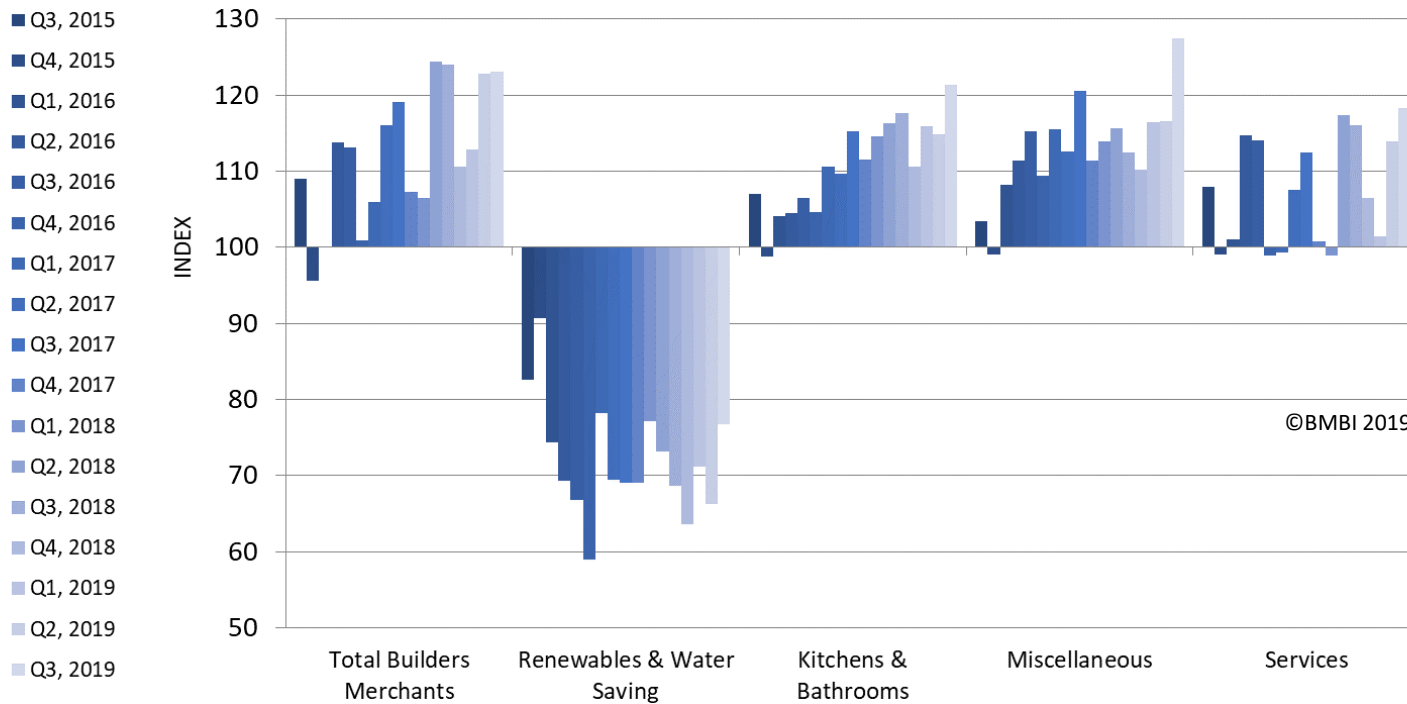
Quarterly: Index and Categories

Quarterly indices



Quarterly Indices

Q3 2015 to Q3 2019



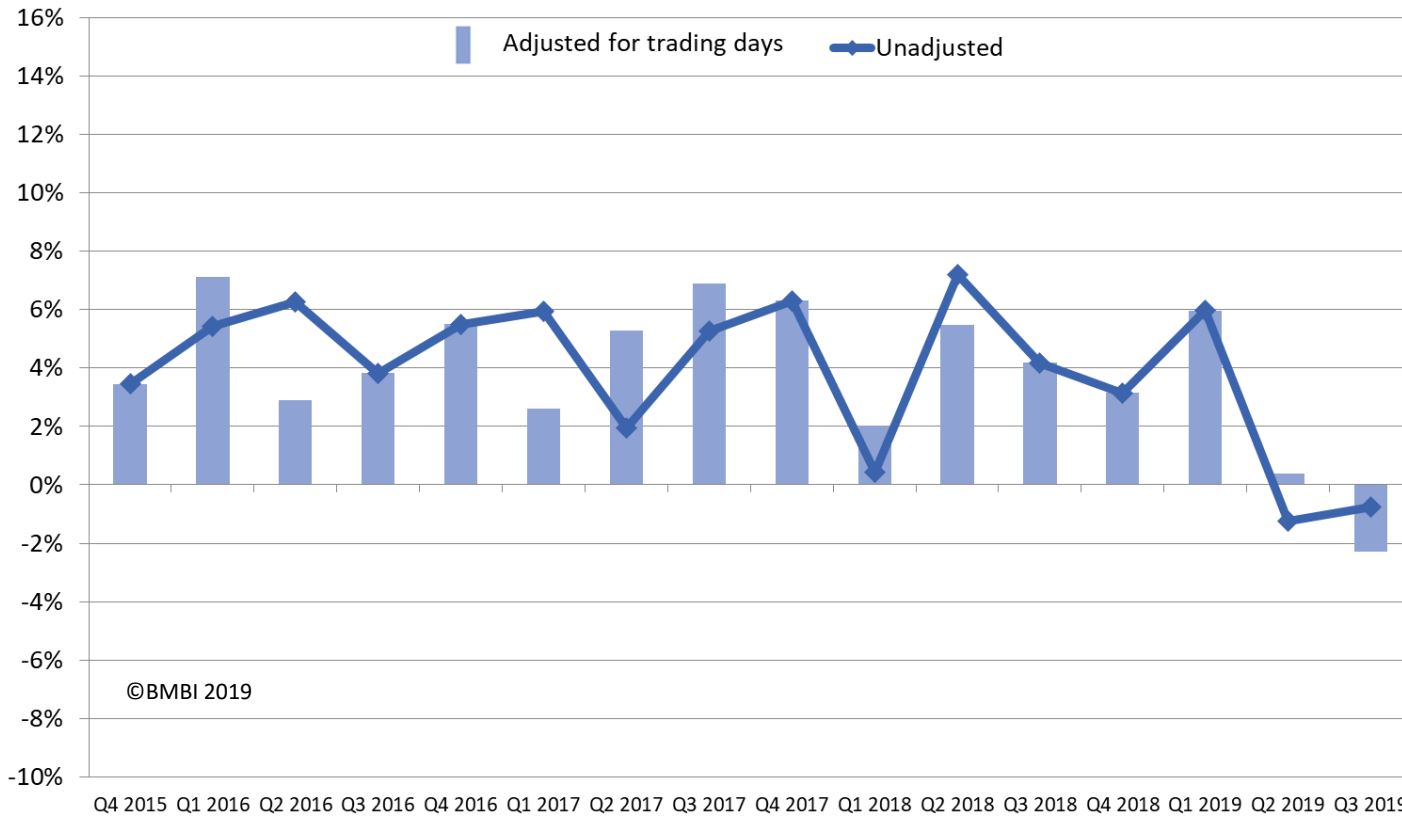
Indexed on July 2014 to June 2015

Source: GfK's Builders Merchants Total Category Report July 2015 to September 2019

Quarterly: Sales Indices

Adjusted and unadjusted for trading days

Quarterly Indices: Year on Year



©BMBI 2019

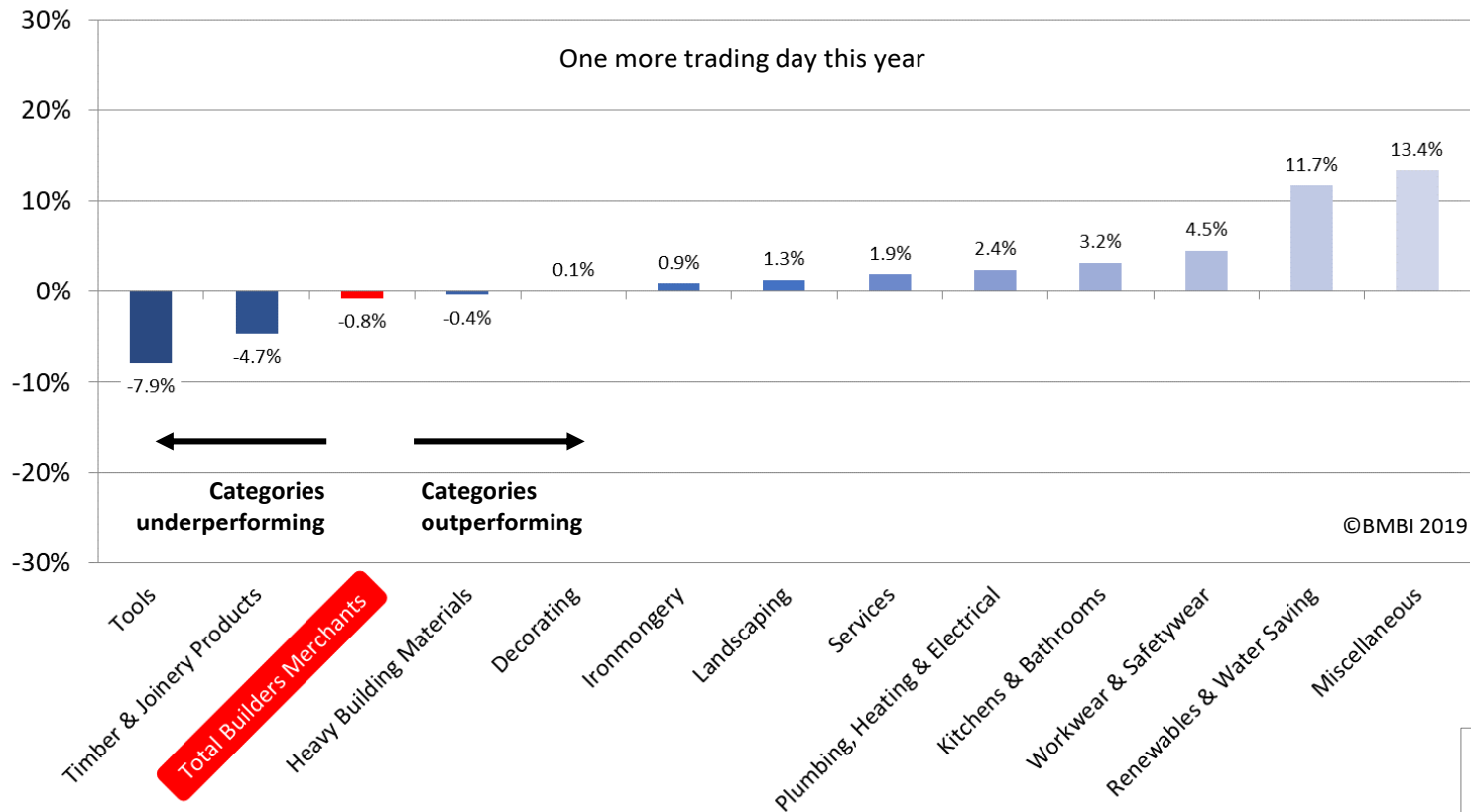
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Quarterly: This Year v Last Year

Q3 2019 sales indices



Quarter 3 2019 index v Quarter 3 2018 index



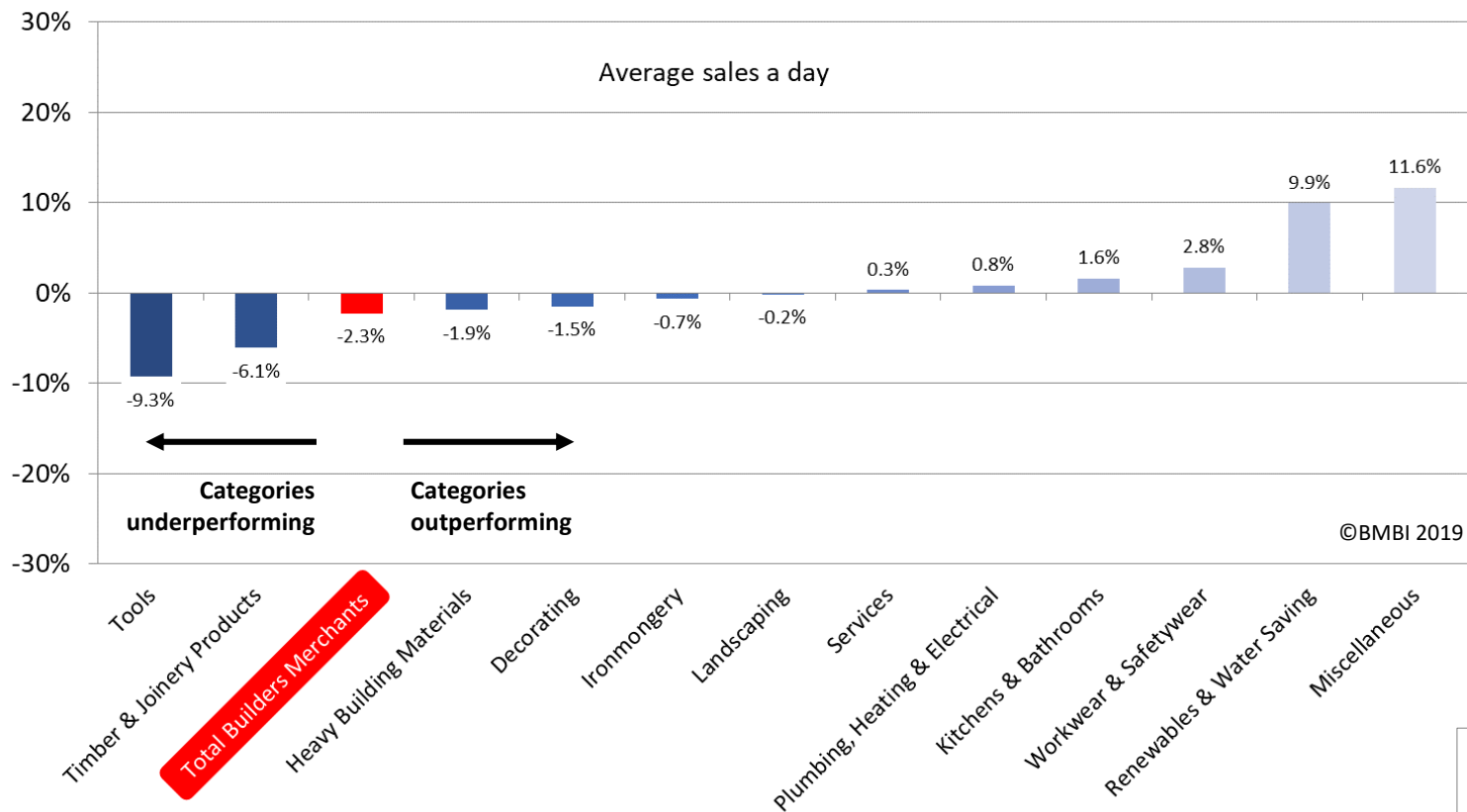
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Quarterly: This Year v Last Year

Q3 2019 average sales a day indices



Quarter 3 2019 index v Quarter 3 2018 index

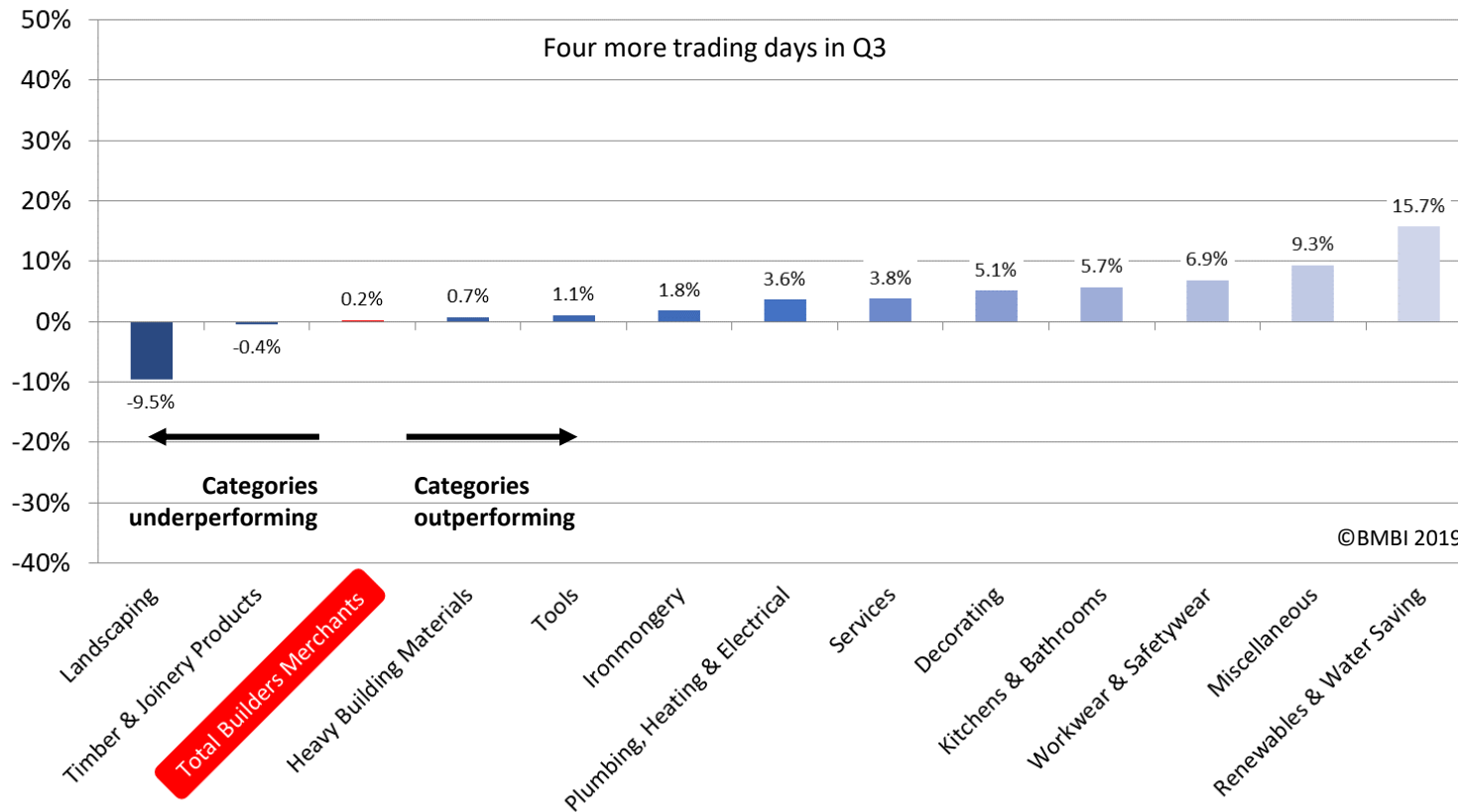


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Quarterly: Quarter on Quarter

Q3 2019 sales indices

Quarter 3 2019 v Quarter 2 2019

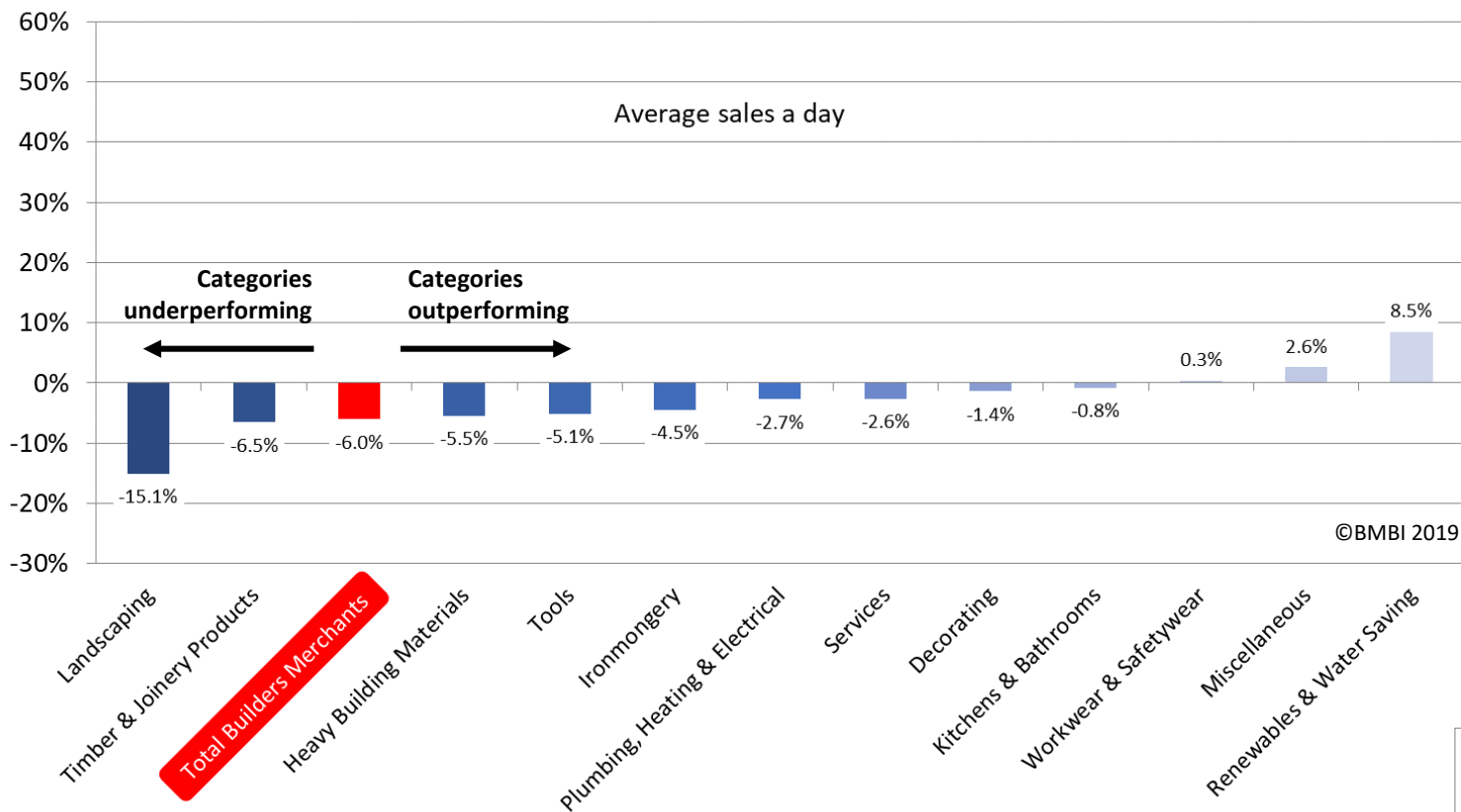


Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Quarterly: Quarter on Quarter

Q3 2019 average sales a day indices

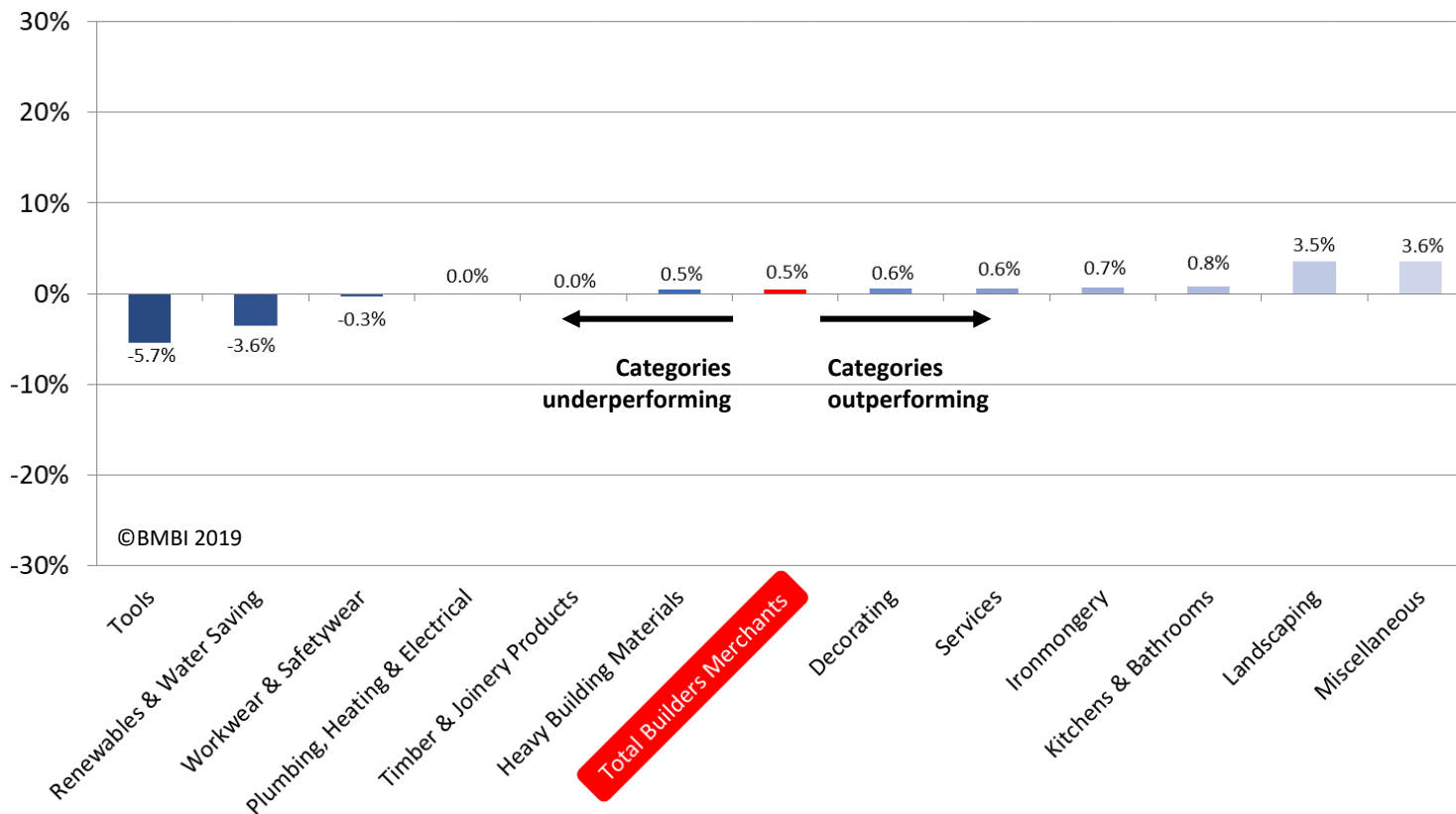
Quarter 3 2019 v Quarter 2 2019



Source: GfK's
Builders Merchants
Total Category Report
July 2015 to September 2019

Last 12 Months: Year on Year Rolling 12 months sales indices

12 months Nov 18 to Oct 19 v 12 months Nov 17 to Oct 18

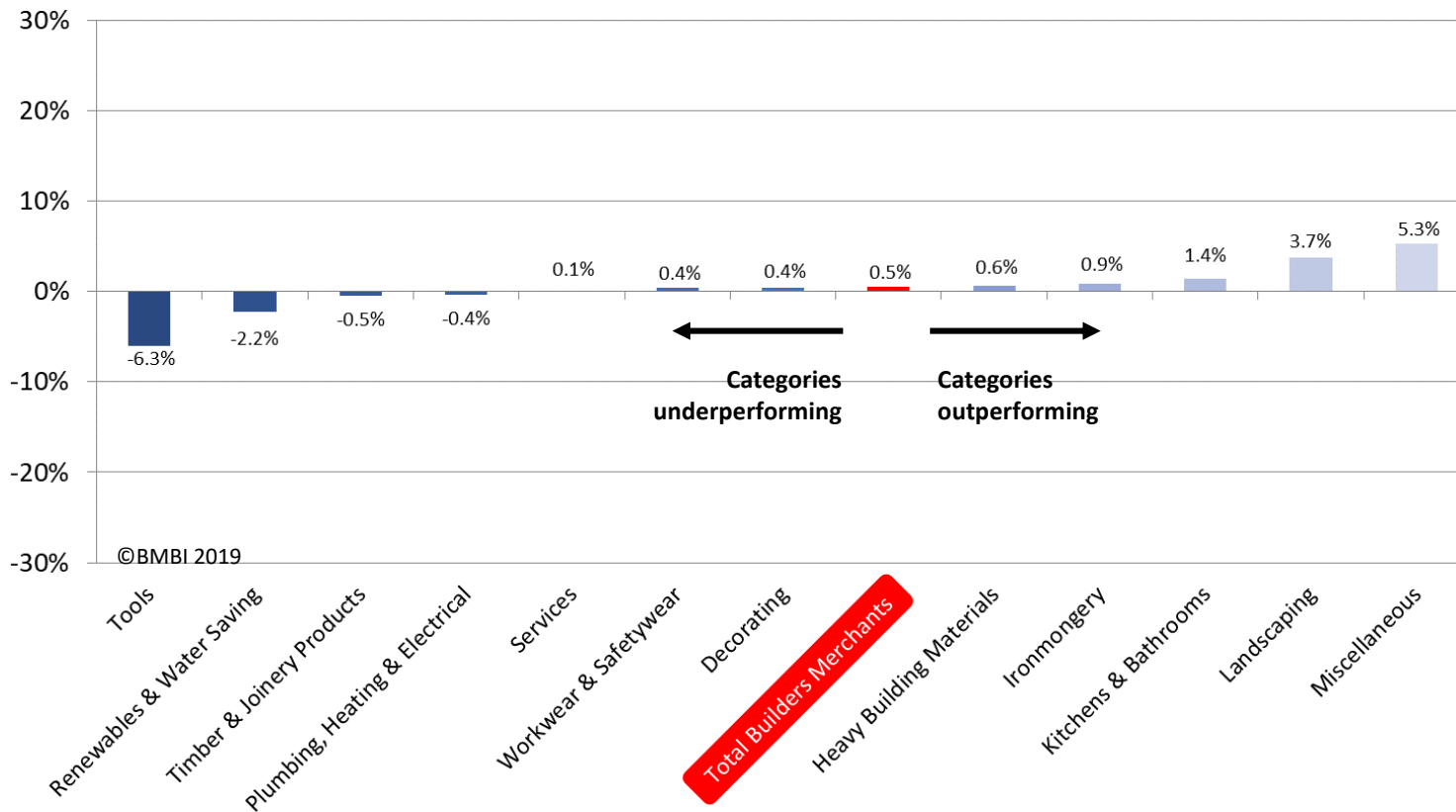


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Year to Date: Year on Year

January to October

YTD Jan to Oct 2019 -v- Jan to Oct 2018

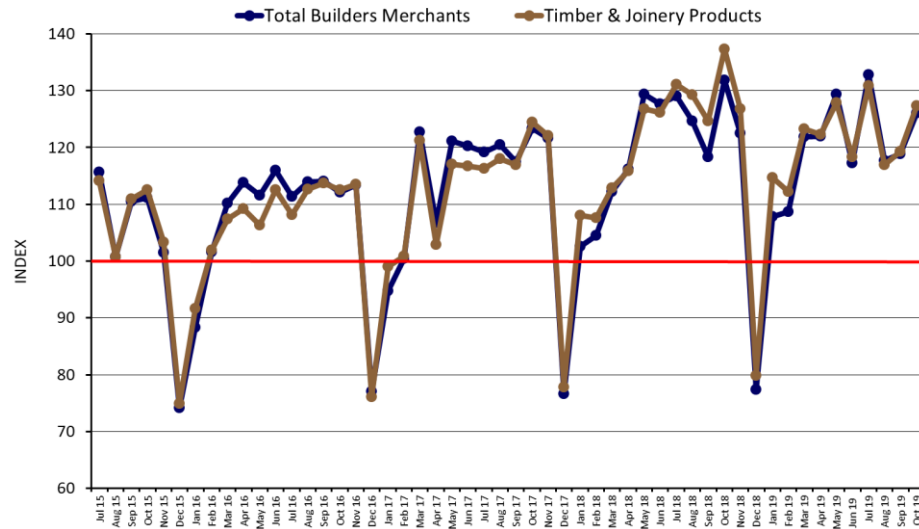


 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: Indices

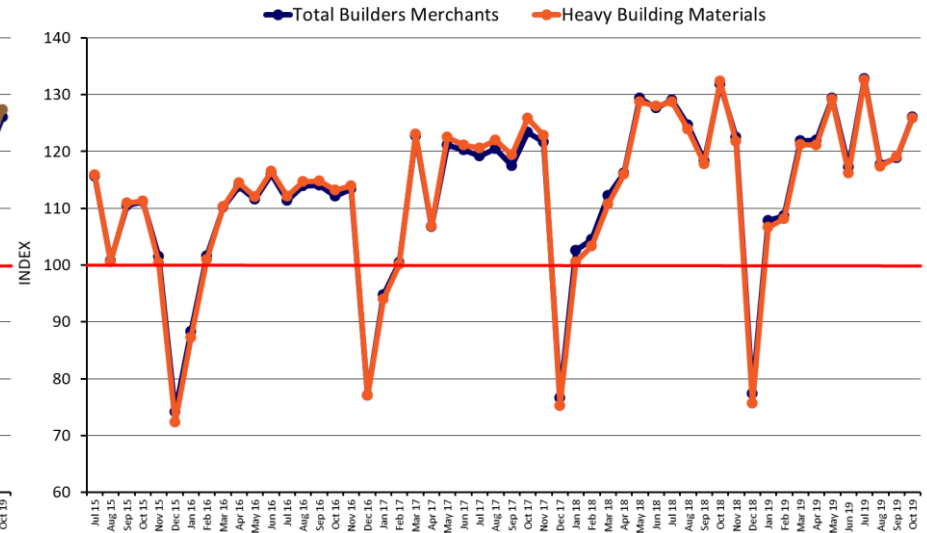
October 2019

Timber & Joinery Products



Indexed on July 2014 – June 2015

Heavy Building Materials



Indexed on July 2014 – June 2015

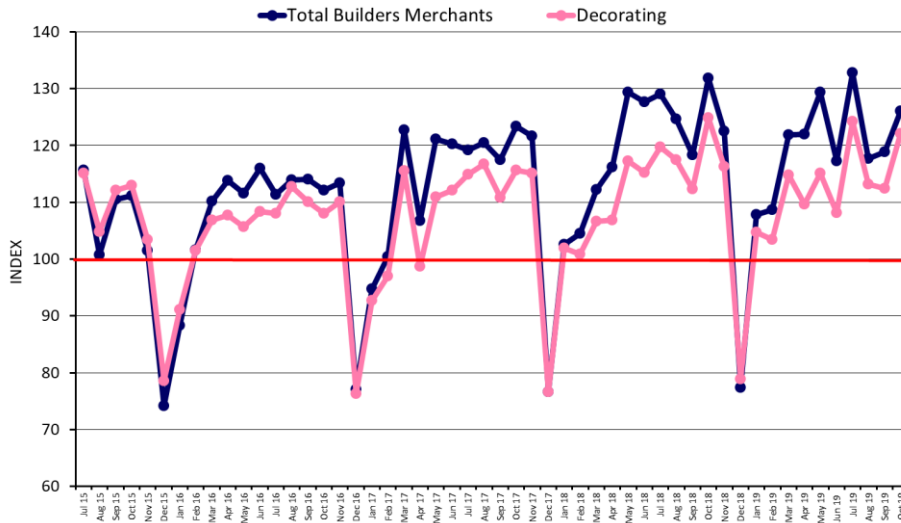
GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: Indices

October 2019

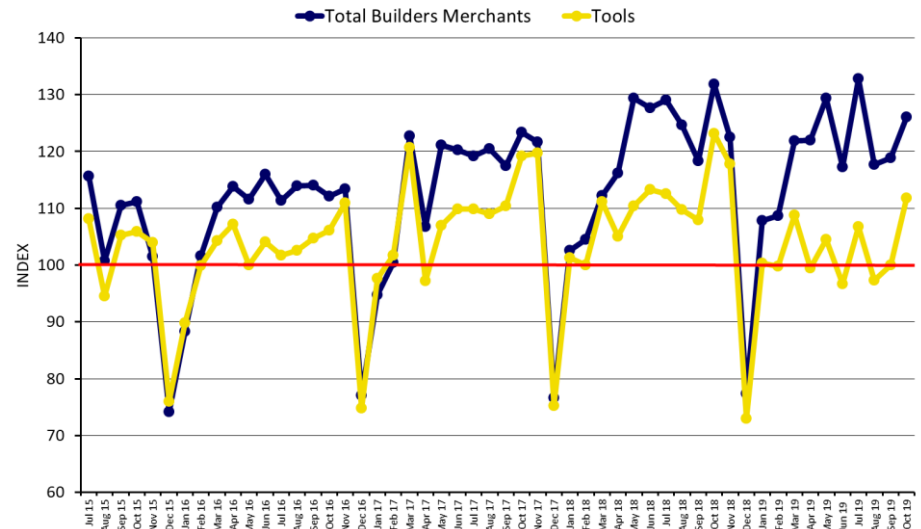


Decorating



Indexed on July 2014 – June 2015

Tools



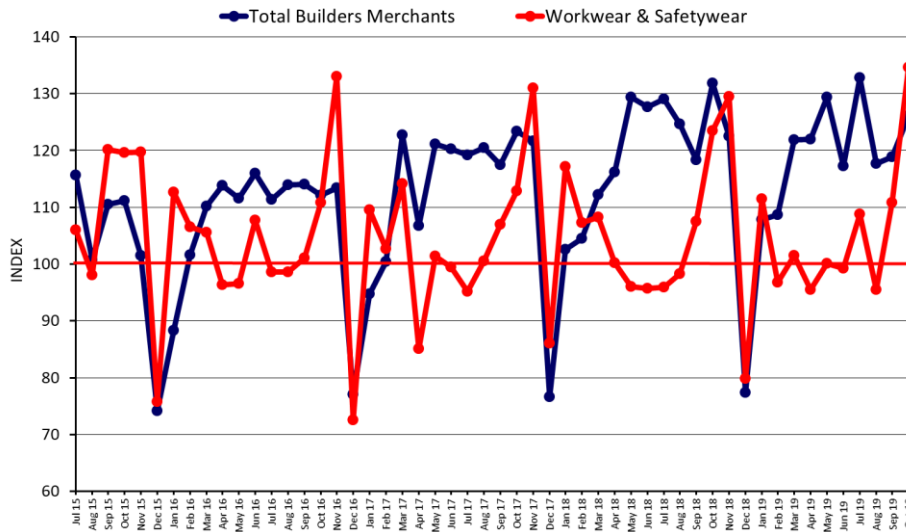
Indexed on July 2014 – June 2015

Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: Indices

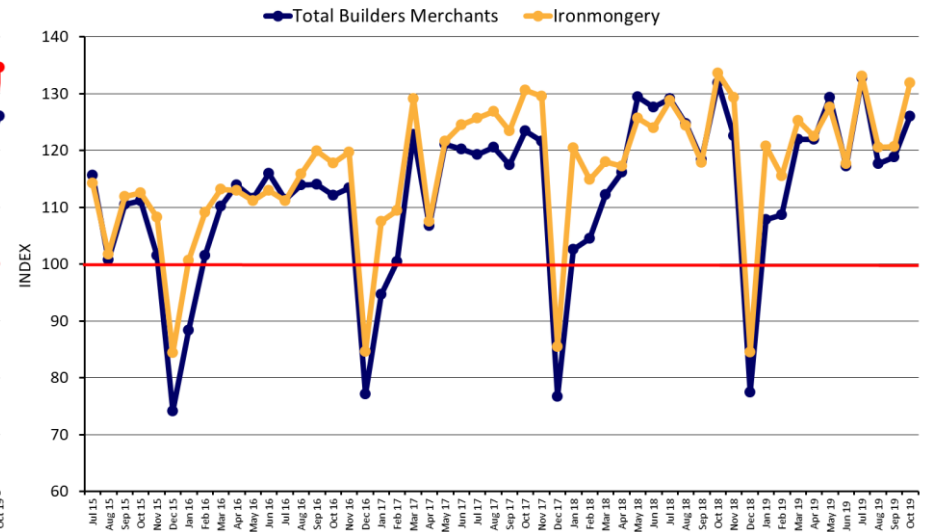
October 2019

Workwear & Safetywear



Indexed on July 2014 – June 2015

Ironmongery



Indexed on July 2014 – June 2015

GfK Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

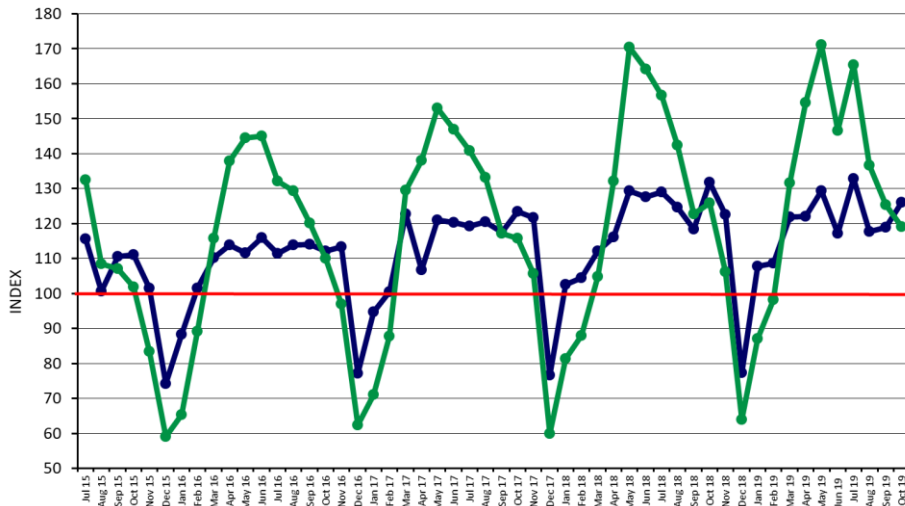
Monthly: Indices

October 2019



Landscaping

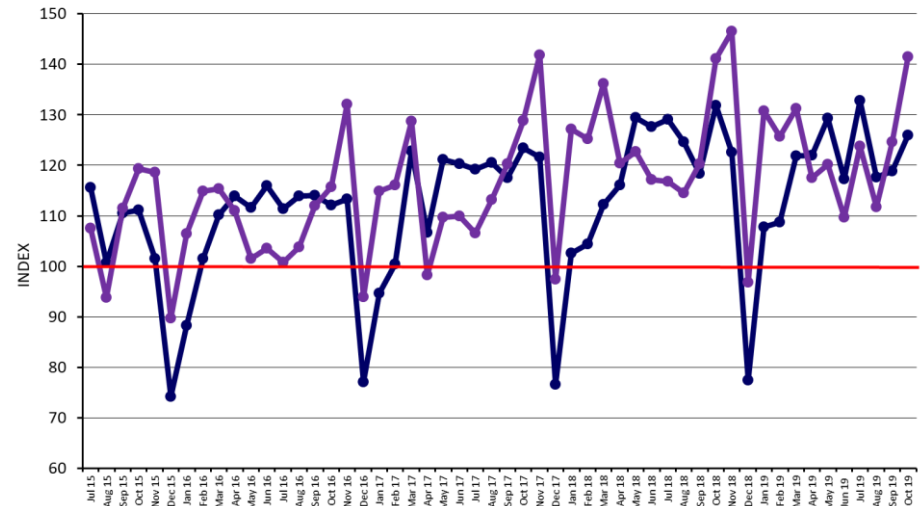
◆ Total Builders Merchants ◆ Landscaping



Indexed on July 2014 – June 2015

Plumbing, Heating & Electrical

◆ Total Builders Merchants ◆ Plumbing, Heating & Electrical



Indexed on July 2014 – June 2015

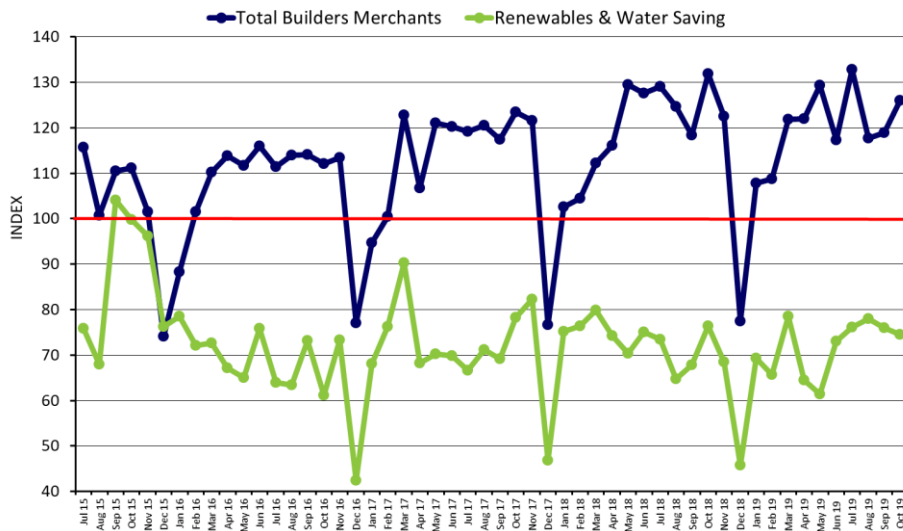
Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Monthly: Indices

October 2019

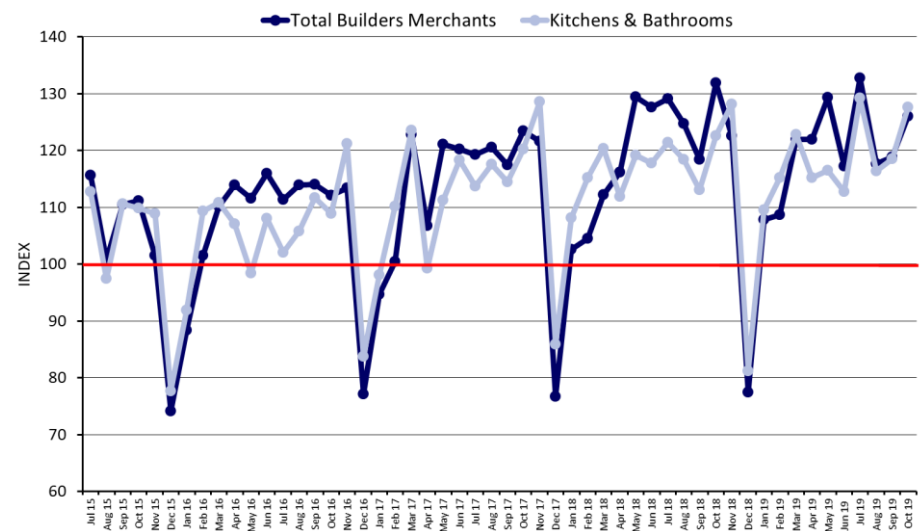


Renewables & Water Saving



Indexed on July 2014 – June 2015

Kitchens & Bathrooms



Indexed on July 2014 – June 2015

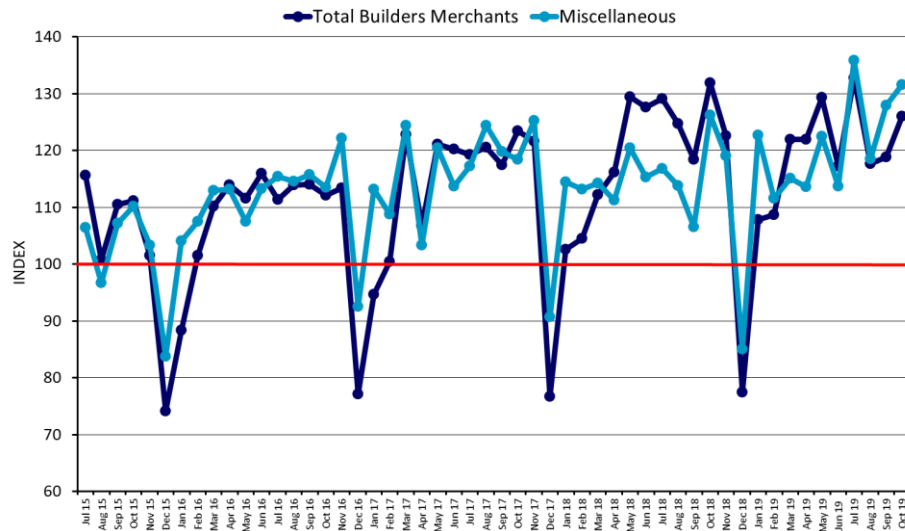
Source: GfK's
 Builders Merchants
 Total Category Report
 July 2015 to October 2019

Monthly: Indices

October 2019

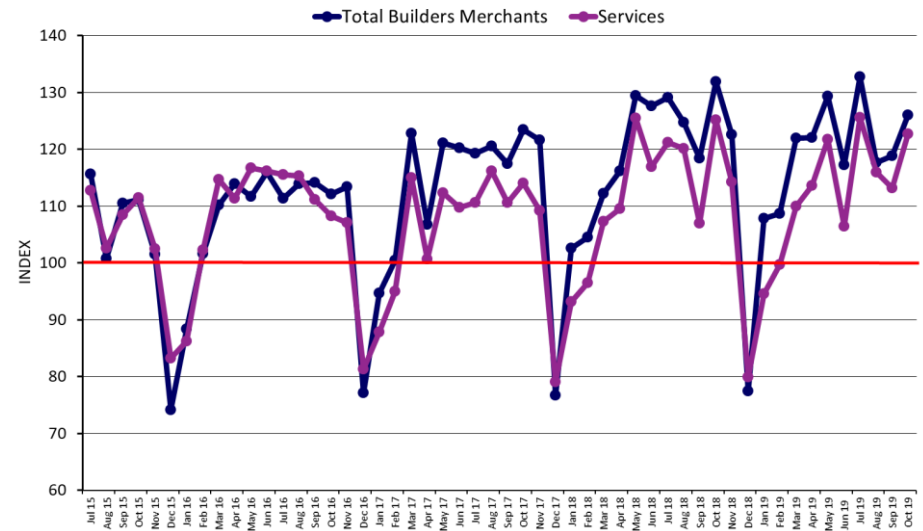


Miscellaneous



Indexed on July 2014 – June 2015

Services



Indexed on July 2014 – June 2015

Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

Trading Days

Monthly												Quarterly				Half Year		Full Year	
Index: 20.8												Index: 62.4				Index: 125		Index: 250	
2015												2015							
						Jul	Aug	Sep	Oct	Nov	Dec								
						22	20	22	22	21	17								
2016												2016				2016		2016	
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	H1	H2	250	
20	21	21	21	20	22	21	22	22	21	22	17	62	63	65	60	125	125		
2017												2017				2017		2017	
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	H1	H2	249	
21	20	23	18	21	22	21	22	21	22	22	16	64	61	64	60	125	124		
2018												2018				2018		2018	
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Q1	Q2	Q3	Q4	H1	H2	250	
22	20	21	20	21	21	22	22	20	23	22	16	63	62	64	61	125	125		
2019												2019				2019		2019	
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct			Q1	Q2	Q3			H1	H2	124
22	20	21	20	21	20	23	21	21	23			63	61	65			124		124

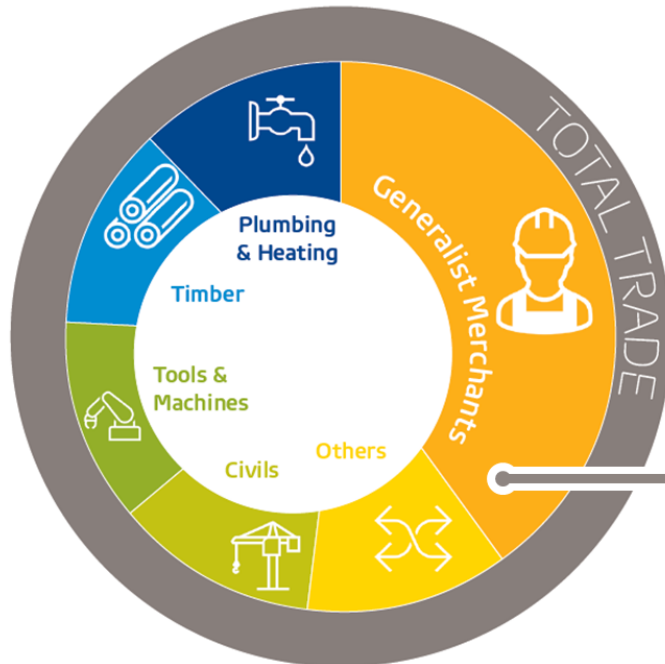
 Source: GfK's
Builders Merchants
Total Category Report
July 2015 to October 2019

GfK's Panel

Generalist Builders Merchant Panel (GBM's)



The Multiple Generalist Builders Merchants Channel



Generalist Builders Merchants

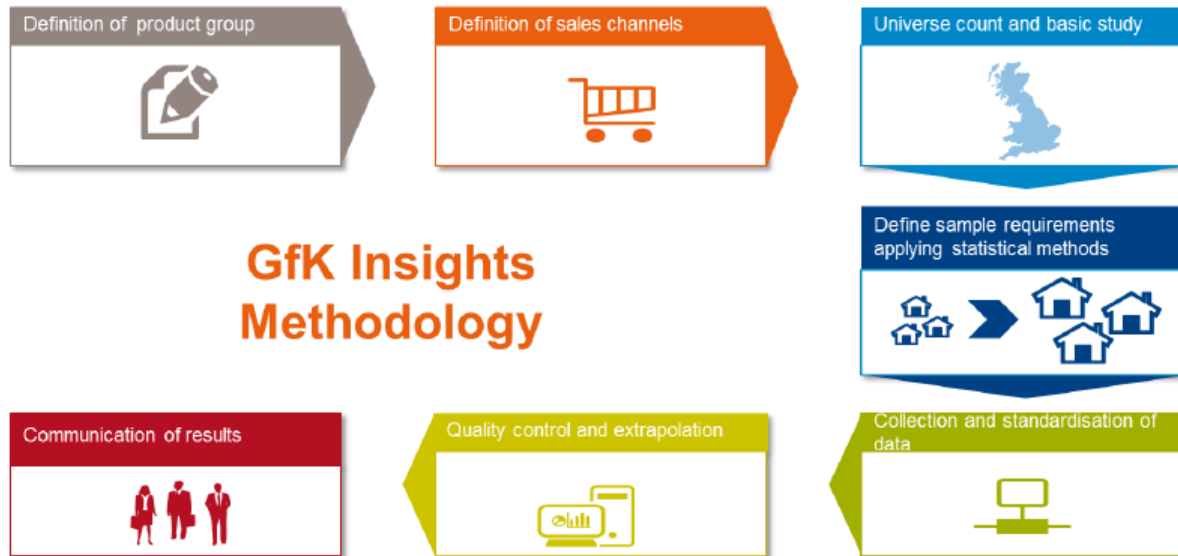
Builder Merchants handle an extended range of building materials and components (e.g. doors, windows, interior furnishing materials, insulation materials, tiles, cement, mortar, adhesives, sealants, nails, hardware products, pipes, ironware, paint) and generate their turnover with professional end users.

Multiple merchants are those defined as having more than 3 outlets or a turnover of greater than £3m p.a.

Examples include:



GfK Insights Methodology



GfK collect live sales-out data from our panel of merchant partners.

We add value to that data through the application of each sold product's unique technical features. We compare like-for-like products and categories from like-for-like merchants and aggregate this within our reports.

Our international methodology is based on robust scientific principles and delivers continuous, reliable information that can be applied to your business requirements.

GfK's Product Categories

Reports cover category headline values & in-depth, brand-level insights



Headline values available

Timber & Joinery Products

Timber
Sheet Materials
Cladding
Flooring & Flooring Accessories
Mouldings
Stairs & Stairparts
Window & Frames
Doors/Door Frames

Heavy Building Materials

Bricks Blocks & Damp Proofing
Drainage/Civils/Guttering
Lintels
Cement/Aggregate/Cement Accs
Concrete Mix/Products
Plasters Plasterboards and Accessories
Roofing Products
Insulation
Cement Mixers/Mixing Buckets Products
Builders Metalwork
Other Heavy Building Equipment/Material

Decorating

Paint/Woodcare
Paint Brushes Rollers & Pads
Adhesives/Sealants/Fillers
Tiles And Tiling Accessories
Decoration Preparation & Decorating Sundries
Wall Coverings

Tools

Hand Tools
Power Tools
Power Tool Accessories
Ladders & Access Equipment

Workwear And Safetywear

Clothing
Safety Equipment

Ironmongery

Fixings And Fastenings
Security
Other Ironmongery

Landscaping

Garden Walling/Paving
Driveways/Block Paving/Kerbs
Decorative Aggregates
Fencing And Gates
Decking
Other Gardening Equipment

Plumbing Heating & Electrical

Plumbing Equipment
Boilers Tanks & Accessories
Heating Equipment/Water Heaters/Temperature Control/Air Treatment
Radiators And Accessories
Electrical Equipment
Lighting And Light Bulbs

Renewables And Water Management

Water Saving
Renewables & Ventilation

Kitchens & Bathrooms

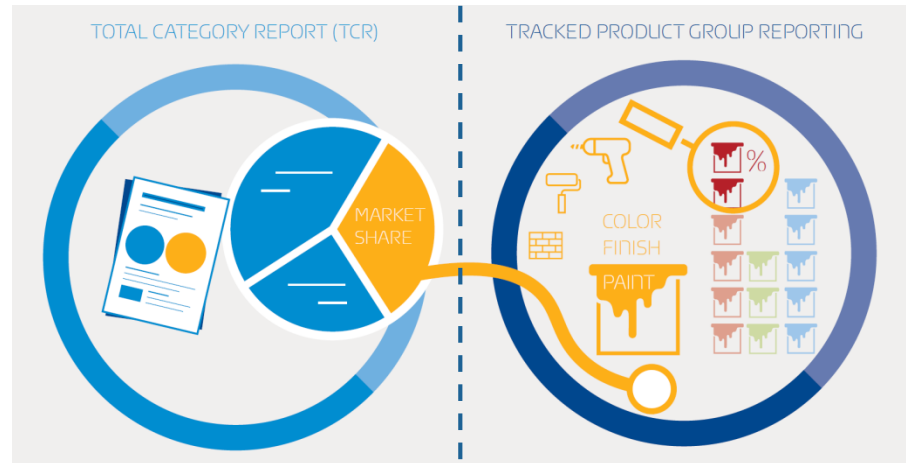
Bathroom (Including Showering)
Fitted Kitchens
Major Appliances

Miscellaneous

Cleaning/Domestic/Personal
Automotive
Glass
Other Furniture & Shelving
Other Misc

Services

Toolhire / Hire Services
Other Services



In-depth product group reporting

Monthly sales values, volumes, pricing analysis & distribution facts available by brand and key product features.

For insights on your product group please contact Pete Church at GfK (pete.church@gfk.com).

Available categories:

Heavyside

Bricks
Insulation

Lightside

Emulsion Paints (incl. Masonry & Base)
Trim Paints
Primers/Undercoats
Woodcare
Adhesives
Sealants
Fillers/PU Foam
Tile Fixing (Adhesives/Grout)

BMF Forecast Report

Q3 2019 edition



Builders Merchants Industry Forecast Report

The BMF have released the Q3 edition of their Builders Merchants Industry Forecast.

While Builders Merchants Building Index (BMBI) data, which is provided by GfK and is based on actual sales category performance, has enabled users to see which products and regions are currently growing, the forecast report takes this one stage further to meet the industry's need for accurate forecasting.

The BMF forecast model incorporates several lead indicators to signal future events that will impact our markets.

Using BMBI data coupled with advanced modelling techniques the BMF have developed a channel specific forecasting model to show what is likely to happen in the next 12 months, making it possible for merchants and suppliers to forecast their customers' requirements more accurately.

The report is updated on a quarterly basis, with the Q3 edition available now. The forecast report can be downloaded by BMF members free of charge - once logged in – [here](#).

Non-members can purchase the report by contacting Nyssa Patel on 024 7685 4994 or email nyssa.patel@bmf.org.uk



**Builders Merchants
Industry Forecast**
2019 - 2021

Winter edition – £195

The BMF. Building your people. Building your skills. Building your business. Building your voice. Building excellence.

Contact us

For further information



Emile van der Ryst

Senior Client Insight Manager - Trade

Emile.van-der-ryst@gfk.com

+44 (0) 20 7890 9615



Neil Frackiewicz

Head of Retail UK

Neil.frackiewicz@gfk.com

+44 (0) 20 7890 9123



Nyssa Patel

Industry Analyst / Economist

nyssa.patel@bmf.org.uk

+44 (0) 24 7685 4994



Lucia Di Stazio

Managing Director

lucia@mra-marketing.com

+44 (0) 1453 521621



Tom Rigby

Commercial Manager

tom@mra-marketing.com

+44 (0) 7392 081276