Annual Review 2022

Inside Corporate Strategy Update 2022 in Events Pics

On the cover

Levelling Up Towards Net Zero

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Chairman's statement

Last year we announced four central themes – Member Value, Skills Development, Supply Chain Collaboration and Government Influence - to underpin a three-year corporate strategy designed to strengthen key aspects of the building material supply chain.

Each of these themes has been assigned a BMF staff owner and a board member champion to oversee progress, and much has been achieved.

First and foremost, we have enhanced staffing levels to support our growing membership.

As a member organisation, member value is at the heart of everything we do. With an increased staff resource dedicated to our member engagement programme, we are reviewing key membership services to better meet current needs. The launch of a tailored service to help reduce energy costs is one example.

Skills Development is another priority. We need to attract, retain, and train a diversity of talent within our industry.

Our new Learning & Development Manager

has helped grow LEAP apprenticeships and is overseeing the continuous improvement of all BMF's training, with the ambition to achieve an interactive career path across all training routes.

The relaunch of the IOBM as the professional institute for the builders' merchants' industry has already seen member numbers rise to over 1100 with a further 30+ corporate supporters. While a new IOBM Mentoring Platform designed to share a wealth of knowledge within the industry will support new and diverse talent joining our sector.

We have more clearly positioned the BMF as standing for the whole building materials supply sector and developed a collaboration strategy that links to the Construction Leadership Council's agenda to ensure we make an impact on the issues that matter most to our members.

BMF's handling of the pandemic earned us a place at the top table with government. We continue to build our profile and influence, both through our work with the CLC and with site visits for MPs, a high level of visibility on all-party parliamentary groups, and our annual parliamentary reception where members can



meet with Ministers, MPs, and Peers.

The role of the BMF is to champion our sector and support our members. The economic landscape is changing in a world post COVID and post Brexit, but I am confident that we can work together to navigate the challenges this brings.

Richard Hill Chair of the Board

CEO's report



Despite the impact of the COVID-19 pandemic and new challenges stemming from the war in Ukraine, BMF membership continued to grow in 2022 and now stands at over 860, the highest number since 1986. With 437 merchants and 423 supplier, service, associate, and distributor members, the BMF is proud to represent a building materials industry that encompasses merchants

and their suppliers in equal measure.

Merchants and Suppliers are essentially two halves of the same whole. This year, for the first time, we celebrated the Top 100 Merchant Influencers with a gala dinner recognising their contribution to the industry. Next year we celebrate the Top 100 Supplier Influencers.

Supply chain collaboration is a key element of the BMF's mission, and it is immensely satisfying to see merchants and suppliers actively contributing to our vision to enable all members to build excellence in building materials supply.

In addition to our various specialist forums and regional meetings – all of which are enhanced by the time and expertise freely given by the members who chair them and support them – we are now bringing together working groups of merchants and suppliers to solve challenges faced by our supply chain. The success of the first, tackling the issue of single use pallets to develop a more sustainable solution, underlines the value of this approach.

Two further groups, one focused on Product Standardisation the other on Sustainability, are now seeking to create a universal template for product data and an industry standard ESG policy both of which will benefit our wider membership.

Within the wider industry, the BMF's involvement with the Construction Leadership Council is another striking example of supply chain collaboration. The focus here is supporting the whole industry to respond to the current economic challenges whilst driving growth, investment, and productivity – the National Retrofit Strategy is one example of this.

Membership of the Construction Leadership Council and my co-chairmanship of its Product Availability Group is also giving the BMF and our members a higher media profile both regionally and nationally. This can only increase public understanding of our role in the building supply chain and create awareness of the career opportunities within our sector, another priority area.

By working collaboratively as One Industry with One Voice we will continue to help our members achieve and sustain excellence throughout our industry.

John Newcomb BMF Chief Executive

Inside...







- 1 Chair's Review & CEO's Report
- 3 Financial Review 2021-22
- 4 Did You Know?
- 6 BMF Corporate Strategy
- 7 Benefits of Membership
- 8 Awards
- 9 Meet the BMF Team
- 10 Meet the Regional Managers
- 12 BMF Forums

Head Office

Builders Merchants Federation Ltd 1180 Elliot Court, Coventry Business Park, Herald Avenue, Coventry CV5 6UB T: 024 7685 4980 E: info@bmf.org.uk

Editorial

Jeremy Harris T: 024 7685 4990 E: jeremy.harris@bmf.org.uk

- **13** Regional Centre's of Excellence
- 14 Construction Leadership Council
- 16 IOBM
- **18** What the Papers Say
- **19** Policy & Public Affairs
- 20 Market data
- **23** ETIM Update

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Advertising sales

Nick Ackroyd T: 0161 823 4707 nick.ackroyd@crosbyassociates.co.uk

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- 24 Young Merchants
- **25** Training
- 26 Membership Plus Services
- 28 New BMF Members
- 29 The BMF Board
- 30 BMF Events 2022
- 31 Future BMF Events 2023
- 32 BMF Publications

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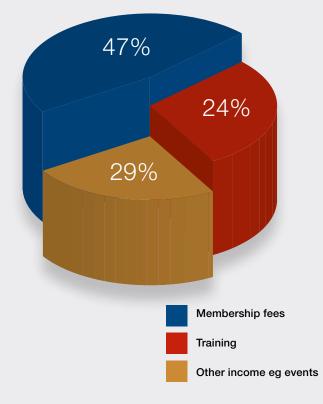


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Financial review 2021-22



Turnover, based on 2021-22 accounts

BUILDERS MERCHANTS FEDERATION LIMITED (A company limited by guarantee)

A company innited by guarantee)

INCOME STATEMENT

FOR THE YEAR ENDED 31 MARCH 2022

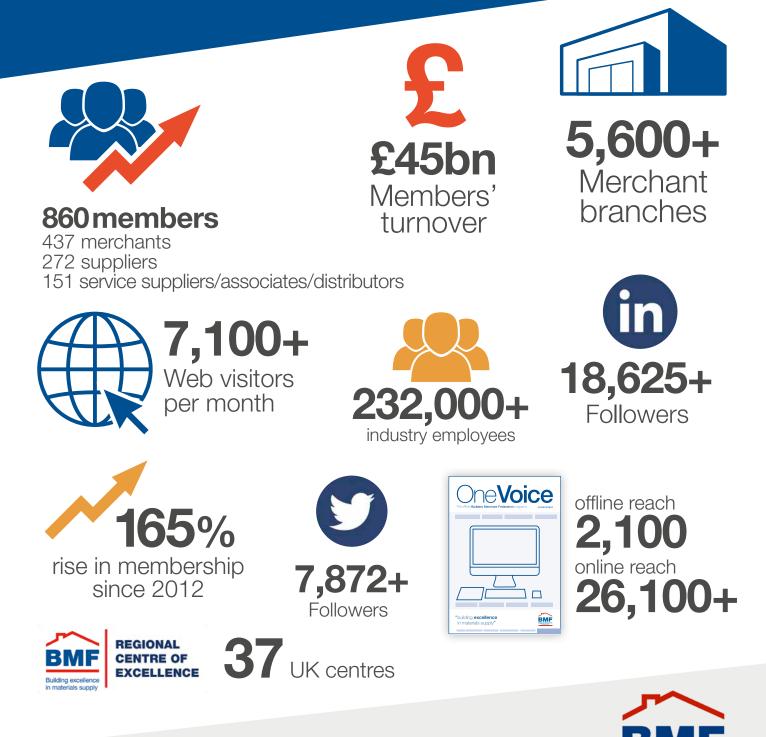
	2021 £	2022 £
Turnover*	1,261,233	2,696,551
Operating costs	(1,438,613)	(2,773,681)
-	(177,380)	(77,130)
Investment Income	502,046	196,364
Goverment Grants	87,018	9,883
Investment Property Revaluation	19,000	20,000
Operating surplus	430,684	149,117
Interest receivable and	4 080	9 674
similar income	4,089	3,674
Surplus/(deficit) before tax	434,773	152,791
Tax Surplus for the financial year	(10,917) 423,856	(9,490) 143,301
Carpiac for the interioral year	120,000	140,001

* Please note the fluctuation in income is due to the bi-annual All-Industry Conference

Did you know – BMF in Numbers?

The BMF is the only trade association representing and promoting the interests of merchants, suppliers and service providers operating in the building materials supply chain in the UK & Ireland.

Together, BMF members form an impressive network of businesses, shaping and leading the sector in the supply and manufacture of building materials, home improvement products and renewable energy systems.



Building excellence in materials supply

4



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BMF Corporate Strategy Update

It has been a year of many major world and UK events, but the BMF has continued to forge ahead with its long-term vision to 'enable members to build excellence in building materials supply'. The strategy roadmap that was launched in 2021 remains in place to guide this work, which is perhaps now even more important as the UK enters a period of economic uncertainty.

Achievements since the last Annual Review include:

- Project Excellence extended to our service and supplier members
- More emphasis and recognition for apprenticeships and staff training
- BMF profile raised through the CLC, Forums and the Construction Youth Trust
- Our industry is now clearly defined as 'building materials supply'
- Supply Chain collaboration strategy now established – Working Groups in place for Product Data Standardisation and Sustainability
- Numerous MP visits arranged to BMF members, successful parliamentary reception completed
- Re-launched the loBM as the 'professional body for the builders merchants industry' with its own strategy roadmap and its own vision, mission and values

"The more you use the BMF, *the better it gets.*"

Whilst it is good to see our membership continuing to grow and greater levels of member engagement, there is still much to be done. Difficulties in recruiting staff persist across our sector, there is continuing merchant consolidation and the last 12 months have also seen the impact of the Russian invasion of Ukraine creating difficulties with product supply and increasing energy costs, whilst there still remains some uncertainty about the economic direction of the UK government.

The BMF continues to highlight the issues impacting on our industry through its many channels into government circles and to push the case for supporting the efforts of our members in helping the country to move towards Net Zero Carbon. Levelling Up must involve a large



degree of retrofitting existing buildings with better insulation and modern energy sources and these are the products that our members produce and supply.

As we look towards 2023, we have launched our Top 100 Supplier Influencers programme to follow on from the success of our Top 100 Merchant Influencers. These programmes are important as they serve to highlight the enormous impact of key figures in our industry in pushing forward with innovative new ideas and the development of products and processes to help shape our industry for the future.

If you want to learn more about the BMF Corporate Strategy or any other aspect of the BMF's activities, please contact your Regional Manager.



Benefits of Membership

The BMF is the only trade association representing and promoting the interests of merchants, manufacturers and service providers operating in the building materials supply chain in the United Kingdom and Ireland.

The BMF is the active hub of merchant and supplier activity in the UK and Ireland, working closely with allied industry groups and regulatory bodies such as trading standards and planning departments, to ensure that issues affecting member merchants and suppliers are tackled promptly and effectively. The BMF is an active lobbyist with local and central government in England, Scotland, Wales and Ireland, and has an impressive track record of achievements.

We pride ourselves on being totally dedicated to the interests of our members, providing supplier-focused training backed up by professional and knowledgeable support through a range of membership services as well as organising events where members can meet face to face, to exchange ideas with fellow merchants, suppliers, and leading industry figures.

We work continually to ensure that merchants survive and thrive in an increasingly competitive and fast-developing market. The BMF's five core benefits of membership:

1. Crucial Networking & Event Opportunities

We all know that good business depends on the right connections.

The BMF provides a range of valuable networking opportunities enabling you to mix and discuss ideas with colleagues in the industry, share your views with fellow merchants and suppliers, feedback ideas to us, and raise any concerns or issues that you feel the BMF should be addressing. These networking opportunities allow open discussion and can help you to find new solutions to old problems much faster. Get involved and benefit from our wide range of major industry conferences and social events, all designed to support your business and help you improve faster. Events for you include:

- Regional meetings for builders' merchants
- Forums for many construction supplies business roles including Branch Managers, Health & Safety Executives, Transport & Distribution, HR, Marketing and Finance
- BMF Annual Conference and Awards (Members Day)
- Bi-annual All-Industry Conference

Connect with the best in the business in our Builders' Merchants and Branch Managers' forums, learn how to measure, improve and personalise your customer experience in our Marketing Forum. Stay ahead of your competitors in our Technology and Transport & Distribution forums. Keep your staff up-todate with our Health & Safety Forum, and build their product knowledge with training and supplier meetings.

Our forums are very popular for a reason – attendees learn new skills and new approaches that they can take back to their businesses and work with.

2. Business Support

We are 100% committed to helping our members build excellence into every aspect of their business.

The BMF is your one-stop shop for invaluable support for specialist builders' merchants and for suppliers to the merchanting industry, providing expert advice and invaluable guides to help you to run your business more cost-efficiently. Discover our range of Plus Services (details of which can be found on page 26), many of which now include free reviews and health checks:

We also offer a wide range of business guides covering advice on issues such as pricing, health & safety, employment law, etc.

3. Training and Development

Training doesn't just help your staff excel at service and provide best-in-class advice to customers.

It helps you attract and retain better talent by offering them a compelling career path. To help, the BMF offers a treasure chest full of industry-specific and specialist training courses for its members, accredited to national standards, including:

- Apprenticeships Plus (LEAP)
- Diploma in Merchant Management
- Sales and marketing
- Margin development
- Transport and distribution
- Management and leadership
- Staff development
- Operations
- Inventory
- Sustainability
- Online product knowledge/ selling & communication skills training (BMF Campus)

Training is available nationally, at a wide range of local BMF Regional Centres, with many courses now also being run online or in a virtual classroom environment. Bespoke in-company training is available for groups of between 5 and 12, as required.





4. Vital Market Insights

To stay ahead of market changes, you need to stay aware.

That's why the BMF provides a wide range of vital statistical business reports for merchants & suppliers including:

- Monthly sales indicators
- Remuneration survey
- KPI report
- Industry-specific product category data based on merchants' own sales, provided by industry experts GFK
- Industry economic forecast reports

5. Political Representation & Influence

Championing your business with Government.

The BMF provides an authoritative, proactive and collective voice for builders' merchants and construction product suppliers, essential to supporting your interests during times of crisis and beyond. We advance and defend the interests of our members to ensure your business is protected. This includes informing strategy and policies with Government through the Construction Leadership Council, BMF Parliamentary Receptions and influencing programmes like the Construction Talent Retention Scheme and CO2nstructZero.

Speak to us about your political representation agenda – we're here to champion what matters most for you.

Information about developments within these five core benefits of membership are covered in more detail throughout this publication and at www.bmf.org.uk.

Did you know?

The Builders Merchants Federation Ltd (BMF) is the only trade association representing merchants and suppliers in the UK and Ireland. Our vision is to enable members to build excellence in building materials supply. Total membership as at 1 September 2022 stands at 860 merchant and supplier companies who together have combined sales of over £45bn and employ over 232,000 people in the building materials industry. BMF's 437 merchant members operate from over 5,600 branches across the UK and Ireland.

Sustainability Award

BMF Commitment to Sustainability

The BMF has signed up to the SME Climate Commitment and has pledged to take action to halve its greenhouse gas emissions by 2030 and achieve net zero emissions by 2040, with the first steps including a review of our daily operations and the identification of simple and low-cost ways to reduce carbon output, such as motion-activated lighting, sharing printers and using sustainable promotional materials for conferences and events.

The BMF welcomed the 'Construct Zero' initiative launched by the Construction Leadership Council in March 2021 and has actively encouraged its members to get on board as a recognised CLC Net Zero Business Champion, with 27 BMF member businesses already enrolled as of October 2022. The BMF has also worked hard to bring merchants and building material manufacturers together through working groups and forums to share information and initiatives in the sustainability area.

Awards 2022 – The Association Excellence Awards







October 2022 Kia Oval: Bronze Award -Sustainability Champion BMF



Meet the BMF team



John Newcomb Chief Executive john.newcomb@bmf.org.uk



Richard Ellithorne Membership Services Director richard.ellithorne@bmf.org.uk



Mike Tattam Merchant Development Manager mike.tattam@bmf.org.uk



Tracy Wootton Financial Controller & HR tracy.wootton@bmf.org.uk



June Upton PA To CEO/Events Manager june.upton@bmf.org.uk



Brett Amphlett Policy & Public Affairs Manager brett.amphlett@bmf.org.uk



Oz Bham Business Development Manager oz.bham@bmf.org.uk



Jeremy Harris Marketing & Communications Manager jeremy.harris@bmf.org.uk



Richard Johnson Membership & IT Manager richard.johnson@bmf.org.uk



Kerry Wilson Learning & Development Manager kerry.wilson@bmf.org.uk



Dave Bate ETIM UK Manager dave.bate@bmf.org.uk



Thomas Lowe Industry Analyst/ Economist thomas.lowe@bmf.org.uk



Sean Teeling Engagement Executive – Merchants sean.teeling@bmf.org.uk



Stacey Lock Engagement Executive - IOBM stacey.lock@bmf.org.uk



Keira Lynch Marketing Apprentice keira.lynch@bmf.org.uk



Tracey Downes Business Admin Support tracey.downes@bmf.org.uk



Tina Skinner Training & Admin Support tina.skinner@bmf.org.uk



Head Office 1180 Elliott Court Herald Avenue Coventry CV5 6UB Tel: 024 7685 4980 London Office 4th floor, IOM3 297 Euston Road London NW1 3AD Tel: 0207 451 7316



You

Tube

Meet the Regional Managers

Our Regional Managers are the first point of contact for most of our BMF members. The Regional Managers are out and about meeting and talking to members every day in their respective areas and they also organise regional meetings which are a great opportunity for you to catch up with fellow BMF members in your area. Below are the contact details for each BMF Regional Manager and the geographic areas they cover.





Mark Potter Scotland and Ireland Email: mark.potter@bmf.org.uk Tel: 07936 928235





Chris Heeks North England and Isle of Man Email: chris.heeks@bmf.org.uk Tel: 07887 678420





Craig Jennings Central Email: craig.jennings@bmf.org.uk Tel: 07702 569001





Richard Jones South West & South Wales Email: richard.jones@bmf.org.uk Tel: 07980 075863



Alex Clifford London, South East and Anglia Email: alex.clifford@bmf.org.uk Tel: 07703 837710 Artex Uniquely connecting you to construction product brands

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BMF Forums

BMF Forums are a great way for members to pick up useful information to assist them in their day-to-day job roles and also to network with similar individuals across other similar businesses in the merchanting & construction supplies world. The BMF now runs many different sector and job-specific forums – usually held twice a year at a variety of locations across the UK. All forums, except for the 2-day Branch Management Forum, are free of charge for BMF members to attend.



Branch Management Forum



Finance



Bricks, Blocks & Landscaping



Civils & Infrastructure



Digital & Technology



HR



Insulation & Dry Lining



Kitchens & Bathrooms



Health & Safety

Marketing



Painting & Decorating



Plumbing & Heating



Roofing



Tools, Fixings, Workwear & PPE



Supplier & Service



Transport & Distribution



Sustainability

"We always find the BMF forums of value. Each time you learn something new from the speakers that you can implement in your own company and learn something about the way the industry works which you can capitalise on." Eddie Burrows – Managing Director, STS Ltd

Timber

Regional meetings

Regional meetings are held twice a year for each region and are by invitation only. Regional meetings will be held across the UK and to express your interest in attending, please contact your Regional Manager.

Members can get the latest forum and regional meeting dates and book forums online at www.bmf.org.uk/events.

Bringing BMF services to you



Our Regional Centres of Excellence across the UK & Ireland are designed to give members in the local area access to BMF training and events much closer to home. Contact your Regional Manager for details.



Plumbing & Drainage Brett Martin

Encon

PR7 7DW

Flamco

WA10 6PB

24 Roughfort Road, Newtownabbey Co. Antrim, BT36 4RB

Keystone

Keystone Lintels Ballyreach Industrial Estate, Sandholes Road, Cookstown, Co Tyrone BT80 9DG

*en*con

1st Floor, Encon Insulation, Unit 3,

Flamco

Flow of Innovation

Buckshaw Avenue, Chorley

Washway Ln, Saint Helens



Scotland & Ireland

Station Road, Cowie, Stirlingshire FK7 7BQ



Saint Gobain 99 Helen St, Glasgow G51 3LH

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Scunthorpe, North Lincs, DN15 8QT

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RGB Howden Industrial Estate, 5 Woodward Rd. Tiverton, Devon EX16 5GZ

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Ridgeons The Green Light Centre, Solopark, Pampisford, Cambridge CB22 3HB



SIG Distribution Adsetts House 16 Europa View Sheffield Business Park, Sheffield, S9 1XH

Civils & Drainage

Flexseal Endeavor Works, Valley Park, Wombwell, Barnsley S73 0UW

Central

BMF



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Geberit Geberit House, Edgehill Drive, Warwick CV34 6LG



JCB Woodseat, Rocester, Staffordshire, ST14 5JR

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BMF Annual Review

BMF In Partnership with the Construction Leadership Council

The Construction Leadership Council (CLC) brings together business leaders from across the construction sector to drive industry improvement and lead a new era of delivery in the Built Environment.

Construction Leadership Council

THE BMF has continued to work closely with the Construction Leadership Council (CLC), where John Newcomb, BMF CEO co-chairs the CLC's Product Availability working group alongside Peter Caplehorn, **CEO of the Construction Products** Association (CPA).

The CLC's Mission:

Working in partnership with industry, clients and Government the CLC will develop an industry that has the capability, capacity and resilience to:

- Support the industry to respond to the current economic challenges
- Drive growth and investment
- Promote the industry
- Improve productivity through digital adoption, industrialisation and innovation
- Successfully manage the sector's transition to Net Zero
- Create improved societal outcomes

In addition to the Product Availability working group activity, the BMF works closely with the CLC to support its various other initiatives including:

ConstructZero

CO2nstructZero is focused on the key issues that will impact the sector in the Net Zero space and we would encourage all companies in the sector to work with us and the CLC to help achieve this aim.

CO2nstructZero's role is not to develop new solutions, roadmaps or new pathways - there are many groups in the industry well placed to do this - but the CLC does have a critical role to play in bringing people together to consolidate collective actions and plans for the sector. We have encouraged our members to get involved by becoming Net Zero Carbon Business Champions and we have nearly 30 so far on-board.

If you wish to get involved, you can sign up to become a Net Zero Carbon Business Champion by signing up to a relevant 'Race to Zero' commitment for your business (see the 9 priorities listed below). You can then share the story of your progress towards this goal via the BMF/ CLC to help motivate our other member businesses to do their bit. New champions are welcomed on a bi-monthly basis.

The 9 CO2nstructZero Priorities Transport

- 1. Accelerating the shift of the construction workforce to zero-emission vehicles and onsite plant
- 2. Optimise the use of Modern Methods of Construction and improved onsite logistics, in doing so reducing waste and transport to sites
- 3. Championing developments and infrastructure investments that both enable connectivity with low carbon modes

Business Champion



Construct ZERC

The Construction Industry's Zero carbon change programme



John Newcomb, BMF Chief Executive

66

On the product availability side, price inflation remains the biggest issue for the industry and further increases in inflation are still likely

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of transport and design to incorporate readiness for zero-emission vehicles

Buildings

- 4. Work with Government to deliver retrofitting to improve the energy efficiency of the existing housing stock
- 5. Scale up industry capability to

CLC Strategic Priorities - 4 Themes

Building Safety

Champion and support delivery of safe & high quality buildings

Net Zero & Biodiversity

Accelerate the sector's transition to Net Zero & mitigate the impacts of climate change

People & Skills

Energise our people, attract talent and enhance their skills for the future

Next Generation Delivery

Boost productivity through digital adoption and industrialisation

deliver low carbon heat solutions in buildings, supporting heat pump deployment, trials of hydrogen heating systems and heat networks

 Enhancing the energy performance of new and existing buildings through higher operational energy efficiency standards and better building energy performance

Construction activity

- Implementing carbon measurement, to support our construction projects in making quantifiable decisions to remove carbon
- Become world leaders in designing out carbon, developing the capability of our designers and construction professionals to design in line with circular economy

shifting commercial models to reward measurable carbon reductions

9. Support development of innovative low carbon materials as well as advancing low carbon solutions for manufacturing production processes and distribution

On the product availability side, price inflation remains the biggest issue for the industry and further increases in inflation are still likely as we move into 2023. The main drivers for this in the construction supply industry are energy, raw material and labour cost rises and the risks that remain around the future supply and cost of energy across Europe which could threaten manufacturing. Our involvement in this critical area for our members means that we are able to be in regular dialogue with the Dept for Business, Energy & Industrial Strategy (BEIS) to share information with the relevant parties across government.

Construction Talent Retention Scheme

The Construction Leadership Council's (CLC) Talent Retention Scheme helps talented individuals showcase their experience and expertise, while helping businesses find the skills they need. A partnership between Government and industry, this not-for-profit, free and easy-to-use programme is supported by the BMF together with many other business associations, member companies, professional institutions and trade unions.



Mark Reynolds, Co-Chair of the CLC

CLC Co-Chair Mark Reynolds said: "The last two years have been momentous for the construction industry, and the CLC has helped to guide and support the sector through a very complex time, saving countless jobs and still delivering the homes and infrastructure our communities need.

"We now want to build on that success to enable a new era for delivery, strengthening collaboration across construction and speaking to Government with a single voice. IOBM

The Institute of Builders Merchants

'The Professional Body for the builders merchants industry'

The IOBM can help you to support and reward your team by helping advance their skills with apprenticeships, accredited qualifications and continuous professional development (CPD) that set the standard for the merchanting profession.

Levels of IOBM Membership STUDENT

Build your career in merchanting with an apprenticeship or accredited qualifications.

ASSOCIATE MEMBER AIBM

Be recognised as a qualified professional and advance your career with letters after your name that prove your professionalism.

FULL MEMBER MIBM

Excel in your career as a merchanting professional with letters after your name that are the mark of excellence and are recognised by employers seeking highly qualified people with proven skills.

FELLOW MEMBER FIBM

A transitional grade from Member, usually by invitation, a way your Institute recognises your achievements & commitment to merchanting.

CORPORATE SUPPORTER MEMBER

Be recognised as an IOBM Supporter and raise your profile as a champion of advancing the merchanting profession.



IOBM Corporate Supporters IOBM Corporate Supporter membership demonstrates your company's commitment to advancing the merchanting profession – here are just a few of our supporters who have joined recently.



IOBM Conference

The first ever IOBM (Institute of Builders Merchants) Conference was held on Wednesday 5th October 2022 and was entitled Building Professional Excellence. The conference was open to all IOBM members and prospective members, and its delegates also had an opportunity to attend the UK Construction Week and Grand Designs Live exhibitions at the NEC.

Hosted by Kevin Parr, 80 delegates registered for the event and keynote speakers were property expert, writer and broadcaster, Kunle Barker, and he was joined by Lt Col (Retd) Stewart Hill and the founder of MKM Building Supplies, David Kilburn.

John Newcomb BMF CEO covered the Vision, Mission and Purpose of the IOBM and was supported by Frank Elkins COO Travis Perkins who spoke passionately about Why Employers need the IOBM and Richard Hill BMF Chairman covered The Power of Mentoring which was further supported by Sue Reed, BMF trainer, who introduced the IOBM Mentoring platform where IOBM members can give a little back to the industry. Her talk was entitled how to become an effective mentor to grow and nurture our talent within the Building Material Sector.

For more details on the IOBM Mentoring system contact kerry.wilson@bmf.org.uk

Find out more about how the IOBM is supporting the professional advancement of those working in the merchanting industry, visit www.bmf.org.uk/iobm or contact your BMF regional manager.

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What the papers say

The BMF works closely with the construction supplies industry trade press, supporting many industry trade shows, events and awards throughout the year.







With an active programme of regular BMF press releases and social media, plus our demonstrated willingness to work closely with important bodies such as the CLC and the Dept for Business, Energy & Industrial Strategy we are able to secure excellent national and regional press coverage for the important issues facing our industry.

Here are just a few of the more recent press cuttings:



Policy & Public Affairs activity

We began 2022 looking forward to a relatively stable and predictable year as the United Kingdom grows out of a post-Brexit, post-Covid economic recovery. BMF activity was planned on the basis that Boris Johnson's Government would concentrate on implementing its manifesto - allowing for inevitable headwinds such as higher raw material, energy, labour & transport costs and contractual pressures - and policy differences like the Northern Ireland Protocol.

But political turmoil at Westminster & Whitehall led to sudden ministerial changes (4 Housing Ministers in 7 months) and significant drift & delay in the direction and implementation of policy. Northern Ireland has not had a functioning devolved government since February 2022 because the Assembly Elections in May were inconclusive. Only Scotland and Wales have stable, majority governments where BMF activity was pursued with clarity.

COLLABORATING

The BMF collaborated with more industry partners than before. We participated in industry-wide alliances like the UK Construction Leadership Council Industry Taskforce, Scottish CICV Forum and the Wales Construction Federation Alliance - to present a united front and lobby for common objectives. By working with them, we pooled resources to maximize our influence, in a co-ordinated way, helping to achieve common objectives. Central to this was the CLC Product Availability Group that monitors the distribution of materials & products to identify goods in short supply - either as demand increases or delays in global trade disrupt well-established supply lines - to manage expectations of customers in the construction, house-building & property RMI markets.

CONSULTING

The BMF provided central & local government with coherent and convincing input to policy, regulation and funding. Proposals were screened for unintended consequences, detrimental impacts and inconsistencies. Wrongful assumptions were challenged and we gave alternatives. Examples of consultations we responded to were:

- Skidmore Review of Net Zero (October 2022);
- Transport for London Expansion of the ULEZ (July 2022);
- DBEIS Market-Based Mechanism for Low-Carbon Heat (January 2022);
- DfT Phase-Out of Sale of New Non-Zero Emission HGVs (September 2021).

VISITING

Most politicians have no real grasp of how materials & products reach the end-user. To overcome this, we take them to visit BMF members to gain insight into a local business and our supply chain.

Visits successfully arranged and completed in 2022 included:

- Minister for Construction taken to Lords Builders Merchants in West London.
- MP for North Herefordshire opened a new branch of Bence Builders Merchants.
- Environment Secretary taken to Bradfords Building Supplies in Cornwall.
- Labour Party Shadow Environment Minister taken to Hughes Forrest in South Wales.
- Minister for Health taken to MKM in Nottinghamshire.



PARLIAMENTARY RECEPTION

In October, the BMF held another parliamentary reception entitled "Levelling Up Towards Net Zero". The aim was to show the best of manufacturing from a selection of our members. Improving the energy & thermal performance of buildings is a long-standing BMF aim. We emphasised that our supply chain is integral to decarbonise homes, electrify heating and create jobs in every region as governments try to reach Levelling Up by 2030 and Net Zero Carbon Emissions by 2050.

31 MPs and Peers attended from all 4 home nations who met 90 merchants & manufacturers. Andrew Lewer MP (Chairman



of the APPG for SME House-Builders) and Bill Esterson MP (Shadow Construction Minister) spoke and responded to our call for comprehensive, long-term, properly-funded National Retrofit Strategy to help existing homes facing rising heating bills.

THE YEAR AHEAD

We expect to work on major policies affecting you over the next 12-18 months, notably:-

- narrowing the gap between housing demand & supply to boost new build homes (including delays due to phosphate & nitrate pollution).
- introducing UKCA Marking to assess and certify goods that replaces CE Marking on 31 December 2022.
- implementing the new Construction Products Regulation that will regulate the marketing & supply of goods and define a safety-critical list of goods.
- decarbonising road transport including clean air zones and banning new petrol & diesel cars and vans by 2030 and HGVs by 2035/2040.
- electrification of homes by transforming the heating market to compel boilermakers to manufacture heat pumps - on the way to banning new gas mains connections by 2026.
- preparing for a new mandatory water efficiency label for products - and a more stringent minimum water standard of 110 litres per person per day in new build.

Please contact Brett Amphlett, Policy & Public Affairs' Manager, on (020) 7451 7316 or e-mail brett.amphlett@bmf.org.uk, to learn more and participate in our policy activity.

Market Data

Builders Merchant Building Index (BMBI)

The Builders Merchant Building Index (BMBI) is a brand of the BMF, launched and managed by MRA Marketing, it uses sales-out data from GfK's General Builders' Merchants Panel and includes a panel of leading industry Experts who comment on the performance of their markets. The panel members help explain trends, issues, and potential opportunities.

GfK's Builders Merchants Panel started collecting data in July 2014, and all trend data in the BMBI is indexed against the 12 months from 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 our industry access to far more accurate and comprehensive data than that available to other construction sectors.

BMBI uses data from GfK's ground-breaking Builders Merchants Panel, which analyses data from over 80% of generalist builders' merchants' sales throughout Great Britain, which has become the only reliable measure of Repair, Maintenance, and Improvement activity in the UK. Filling an important gap, it can be widely used in construction by economists, government, national media commentators and other influencers outside the industry.

Every quarterly report contains expert analysis. BMBI Experts are the 'voice' of their markets, they make sense of trends for users of the building index. Experts are market leaders or brands who aspire to be leaders and are companies that can legitimately speak for their markets. This includes explaining issues and opportunities in their markets, and where appropriate, making the case for or against legislation, industry schemes or government policy.

For more information visit www.bmbi.co.uk

Business News

BMF Business News is the BMF's monthly e-news roundup covering all sectors relevant to builders' merchants. The contents of Business News include; an update on changes and news happening in/with the BMF, a business round-up, an economic update as well as construction, transport, policy, housing and health & safety news.

Forecast Report

The BMF produces the Builders Merchants industry Forecast, which was originally launched in Spring 2019 and is now updated every quarter. The BMF's Builders Merchants Building Index (BMBI) uses data analysed by research company, GfK, to report on actual sales category performance.

While this has enabled users to see which products and regions are currently growing, we have now gone a stage further to meet our industry's need for accurate forecasting. Using the BMBI data coupled with advanced econometric modelling techniques we have developed a channel-specific forecasting model to show what is



likely to happen, making it possible for merchants and suppliers to forecast their customers' requirements more accurately. The BMF model incorporates several lead indicators to signal future events that will impact our market.

The report provides a comprehensive analysis of the Building Industry and key statistics as well as the general economic performance and outlook commenting on inflation, wage growth, labour market, economic growth and the impact of current world affairs on our industry.

All BMF members can access the report for free via the BMF website.

Sales Indicator Report

The BMF Sales Indicator report is compiled every month from sales turnover information from a mix of merchant member's outlets. Builders Merchant sales nationally are adjusted for both price inflation and trading days. The BMF works closely with Phocas (a BMF service member) to provide greater analytics and functionality with the use of an online member area which has been developed within the portal for data submission.

The Sales Indicator Report is sent out monthly to members who either pay for the service or contribute data. As a Merchant member, if you would like an account to contribute data and receive the report for free, please contact Thomas Lowe at thomas.lowe@bmf.org.uk. If your company does not wish to contribute but is interested in receiving the report, an annual subscription can be purchased for £245+VAT for BMF members or £295+VAT for non-members.

Weekly Economic Bulletin

The BMF Weekly Economic Bulletin highlights the key news stories of the past week relevant to builders' merchants and suppliers. The bulletin includes summary statistics, economic updates and the latest impacting news.

State of Trade Survey

The BMF State of Trade Survey is a quarterly report measuring confidence within the market. Merchant members complete the survey and responses are collated to create the report. The report aims to analyse sales, costs, investment, employment and impacting current world affairs.

Remuneration Survey 2022

The BMF 2022 Remuneration Report shows salaries, wages and benefits paid to Builders' Merchants employees up to 1 April 2022. Results are given for each of the thirteen Standard Planning Regions and nationally to help benchmark against other Merchant members within the industry.

Salaries and wages are broken down by job role and additional benefits refer to health

insurance, car allowance, fuel allowance and so on. The employee statistics section has also been expanded to report on the percentage of apprentices and the male and female split of these apprentices.

We are very grateful for the 136 responses that we received for this year's report, the next edition is set to be released in early 2023.



Plumbing & Heating Market Data Supplement

The BMF has added to its vast range of market data publications to create the Plumbing and Heating Market Data Supplement. The monthly Supplement covers the latest data within the Plumbing & Heating sector and includes a summary of the Plumbing & Heating Merchant Index (PHMI) highlighting the key statistics within the industry.

In addition to the PHMI, the Supplement discusses the latest EUA economic update covering market coverage of Boiler Statistics and Solar sales alongside key economic indicators such as the price inflation of Plumbing & Heating products reported by the Government Department for Business, Energy & Industrial Strategy (BEIS).



BMF Market Data resources can be downloaded by members directly from the BMF website at **www.bmf.org.uk.** For further information or help contact Thomas Lowe (BMF Industry Analyst/ Economist) at **thomas.lowe@bmf.org.uk.**



Gibbs & Dandy are your handy, jack of all trades local builder's merchant. Whatever your trade is, you'll be welcome at Gibbs & Dandy. We're sure to have everything you need, and if for whatever reason we don't, our team will work hard to get it for you.

A lot of our branches carry specialised ranges, specialising in timber, bricks, landscaping and much more. Our teams will be happy to invite you in for help with your job list. With 28 branches nationwide, feel free to pop in for a cup of tea and chat about your next job with one of our colleagues.

We offer our customers a personal and trusted service. Your experience and projects are at the heart of everything we do. Our knowledgeable teams are always on hand to provide advice and solutions. We work with you to ensure your plans become reality.



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www.gibbsanddandy.com

ETIM Update

Lots more groundwork has been put in this year with the main focus being to get the membership engaged via numerous Working Groups, led by the BMF's ETIM UK Manager, Dave Bate



Once again, it has been a busy year pushing ahead with the work required to roll out the ETIM data model across the UK construction supplies industry in conjunction with our builders merchant and supplier members.

Getting the appropriate BMF members involved with the product expert working groups has been the main focus this year, especially as we needed to start converting the output from the groups into updates for the next release of ETIM v9.

During the first half of the year, we held 23 expert working groups covering skylights, timber, sealants and adhesives, landscaping, insulation (pipe/thermal), pitched roofing and guttering. During these virtual working groups, we brought together 50 experts from over 40 members including merchants, suppliers and trade associations.

Having completed working groups now for bricks and blocks, building insulation, timber, paints, sealants and adhesives, cement, concrete and aggregates, plaster and plasterboard and fitting insulation the output from these groups was then processed into ETIM International's request for changes that can then update the ETIM data model, therefore ensuring that the ETIM data model is correctly updated and representative of the UK marketplace for the future.

In the second half of the year, we continued with a further 15 expert groups which will cover sectors including Pitched Roofing, Guttering, Landscaping, Timber and Skylights sectors. These working groups will continue next year into new sectors that will include Power Tools, Hand Tools, Pipes, Drainage, Valves/Taps, Pumps and Workwear and PPE.

The BMF has continued to engage with other data initiatives as it is vitally important in the ongoing goal to have good quality, consistent product data throughout the construction supply sector. The BMF has been working with the Construction Products Association (CPA) and has just completed the 2nd phase of their Lexicon project and will be assisting in future phases.

On-going collaborations including working as an affiliate member of NIMA (formerly UK BIM Alliance) and with GS1 UK as part of a construction sector working group initiative to help promote the use and uptake of a globally recognised unique product identifier which is important in achieving the Golden Thread and also seen as a vital element of the Code for Construction Product Information (CCPI).

To help BMF members who are embarking on the path of digital transformation, we are now working on a series of White Papers to explain the various topics in an easy-to-digest format. These will be adapted from EDA information that has already proved most helpful in the electro-technical industry and our 5 x White papers specifically tailored for the construction industry should be available in early 2023.

Find out more



www.etim-uk.co.uk ETIM UK

Dave Bate ETIM UK Manager dave.bate@bmf.org.uk 02476 854980 07923 221526





Young Merchants

BMF Young Merchants

The BMF has always been passionate about developing young people and moulding the industry for the next generation and with that in mind, the BMF Young Merchants Group was created.

With over 100 members in the group currently, the Young Merchants Group's aim is to bring together young, senior or middle management level staff from both merchant and supplier companies to network, build long-lasting business relationships, and to have a positive influence on the future of our industry.

Events include aroundthe-table open debates on important business issues, presentations from business speakers and overseas visits to see how our European partners operate. There is also a good social programme at the events as well.

With the guidance of the new Young Merchant Chair Jo Callow and Vice-Chair Edward Parlato, the group is now focusing on hot topics such as how to bring more women into the industry, how they and their businesses can get involved in working towards a more sustainable future and building on their relationships with our European contacts.

BUILDING THE NEXT GENERATION



If you are under 40 years of age, have a middle/ senior management role in your company and feel that you'd like to become a member of the group please contact Thomas Lowe, who helps coordinate the Young Merchants group, at **thomas.lowe@bmf.org.uk.**

Buildingmaterialscareers.com

- Promote your excellent job vacancies through the only industry specific recruitment website for free
- Represent your industry by becoming an industry Ambassador

The relaunched website promotes apprenticeships, lifelong learning and aims to attract and develop talented people.

Helping members recruit a workforce from a wide range of backgrounds and experience, the website gives members the opportunity to manage their job advertisements using the 'Advertise A Job' facility.

For more information visit **www.buildingmaterialscareers.com** or contact Kerry Wilson (kerry.wilson@bmf.org.uk)



Training

In January 2022, BMF launched its partnership with LEAP Early Careers and Apprenticeships. Over the last ten months, we have grown our apprenticeship offering supporting members with recruitment, setting up and managing the apprenticeship service account, raising the profile of the industry whilst promoting both apprenticeships and career opportunities within the sector to schools, colleges, careers fairs and Apprenticeship shows.



BMF Campus

BMF Campus Following the development of our BMF Campus, we have been able to introduce key learning materials to member businesses. We are now looking to develop four new Building Blocks; Kitchen, Bathroom, Roofing and Civils & Drainage, in addition to the existing Timber, Residential Building, Heating & Hot Water, Buildings Insulation and Customer Care.





BMF Diploma

The BMF Diploma in Merchant Management (DiMM) is our flagship management course usually completed over an 18-month period consisting of 9 units. Since its iteration in 2007, it has gone through several revisions and changes – some small and others quite sizeable.

The traditional nine, face-to-face workshop format is still popular with many merchants, but recent events such as Covid-19 and the energy crisis have shown us that the Diploma must be flexible in the way it is delivered, whilst still maintaining its highquality content base.

There is now a hybrid (flexi) Diploma programme available, where we combine online and face-to-face delivery. This is not just about saving time and money in terms of delegates travelling sometimes many miles across Britain for workshops, but it is, in fact, born of a realisation that both online and face-to-face delivery styles have distinct strengths and can complement each other very well. Providing group and team activities where delegates can work together on scenarios that replicate real management challenges. We are also working on ways that some of the Diploma written assessments, all of which presently are done by delegates individually, can be done as collaborative pieces of work allowing delegates to work with colleagues to address areas of management good practice.

To enable individual learners access to the programme we have a 'Solo' model where One-to-One delegates can set their own timetable. They can undertake the Diploma programme over a shorter or longer period than the standard year and a half and, having decided on the length of programme they want to undertake, they can still accelerate or slow down as they work through the programme as they wish or as circumstances dictate.

At the outset, delegates are issued with a personal plan and allocated a tutor. They then decide with the tutor the start of the initial Diploma cycle. In time for the start of each of the nine cycles, delegates receive all the standard Diploma material but also a video presentation of important key content and support for the assessments for that section. For each of the nine cycles, delegates also have an hourlong online tutorial with their tutor, where

they can discuss key concepts and areas of content, issues with assessments and, if they wish, make adjustments to their Diploma timetable.



To gain further information on any BMF training or Apprenticeships, contact our Learning and Development Manager Kerry Wilson or Training Administrator, Tina Skinner at **trainingadmin@bmf.org.uk**

Membership Plus Services and Business Guides

The BMF continues to develop its Membership Plus Services and communications to members. Members can download a wide selection of business guides and learn more about Membership Services we offer in the members' zone of **www.bmf.org.uk**

Here are our most popular Plus services:

BMF Specialist Insurance Plus

BMF Specialist Insurance Plus is an exclusive, bespoke service offered to BMF members by Specialist Risk Group

which provides an enhanced insurance offering for builders' merchants and suppliers. Covering Motor Fleet, Employers' Liability, Public/Products Liability and Property, Asset Protection and Business Interruption, they can help you with your insurance needs. A FOC Cyber Threat Intelligence report is available on request.

Trustpilot

The BMF and Trustpilot partnership allows companies to put reviews and customer feedback at the heart of their business to improve their

customer engagement. It gives you the tools to empower your customer-focused team to help deliver better customer service and facilitates a two-way relationship with customers online. You can also respond to reviews and resolve customer issues faster to increase brand value and loyalty. 10% discount for BMF members.

BMF Intelligent Employment Plus

Do you want to take the pain out of workplace problems? The BMF has partnered with Halborns, a specialist

employment law firm and launched a new employment and HR advice service called BMF Intelligent Employment Plus. This allows you to focus on building your business rather than managing difficult employment issues. Ask about our FOC 15 minutes of employment advice service.

ENF Specialist Insurance Plus

BMF Apprenticeships Plus (in partnership with LEAP)

Now relaunched in partnership with LEAP Apprenticeships & Early Careers who will

manage the whole process for you, apprenticeships are 'learn and earn' opportunities and an investment in training and development of and for your staff. Apprenticeships aren't just for entry-level roles or for trade-based careers. Apprenticeships can also be for upskilling existing staff and can be suitable up to senior leadership level.

BMF Safety Plus

The BMF has teamed up with Citation who work with over 100 merchant clients over 500 locations to offer BMF Safety Plus.

This service offers practical and tailored health and safety support for BMF members with up to the minute health and safety advice designed to keep you and your employees safe. There is both telephone and online support. BMF Safety Plus offers a Free Health and Safety review for BMF members.

BMF Transport Plus

Designed to help you manage one of your biggest company cost centres - your vehicle fleet. Not only are vehicle operations a major area of







BMF Energy Plus

With soaring energy prices affecting every sector of UK society, the Builders Merchants Federation (BMF) has partnered with Full Power Utilities to help



BMF Members reduce their energy costs through a new tailored service, BMF Energy Plus.

BMF members will have access to a pool of suppliers, including some that do not sell directly to the end user, as well as a range of different procurement strategies to help them find the best possible contract for their usage.

BMF Business Guides

9 x Health & Safety related guides are available plus a range of other guides covering areas such as pricing, materials handling, transport and UK law.



For details of all BMF Membership Plus Services and Business Guides please visit www.bmf.org.uk/membership or contact Richard Ellithorne at richard.ellithorne@bmf.org.uk



Trustpilo





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Recent New members

Our membership continues to grow year-on-year as we continue to seek to provide greater member value to all our merchant, supplier, service, distributor and associate BMF members.

Below are just some of our recent new BMF members:



The BMF Board





Richard Ellithorne Membership Services Director

Non-executive directors

Board advisor





Frank Elkins Group Chief Operating Officer Travis Perkins

Group Managing Director Haldane Shiells Group





Mike Ward Territory Director UK Wavin



CEO Lords Builders Merchants



Director

Bradfords



Managing Director Merritt and Fryers

Regional Chairs







Jack Taylor Howarth Timber & Builders M & T Builders Merchants Merchants Yorkshire



Alan Trail Scotland

Vacancy

North West



Steve Robinson J T Dove North East



James Hipkins W S Emery West Midlands



David Pattison Robert Price Builders Merchants South Wales

Sector Chairs

Alex Peacock

Williams

Marketing

Gary Good MP Moran

Decorating



Louise Polston Alsford Timber London/South East





David Young Bradfords South West





David Haldane Haldane Fisher Northern Ireland



Giles Bradford Bradfords Sustainability









Jeremy Gear Roofing Gear Roofing





Mark Bradley Frontline Bathrooms **Plumbing & Heating**

Supplies Timber



Paul Bence E H Smith Transport & George Bence Group Kitchens & Bathrooms Distribution



Jewsons Civils & Infrastructure

David Young Bradfords Bricks, Blocks & Landscaping

Andy Scothern eCommonSense

Digital & Technology

Dean Hayward



BMF Annual Review



29

John Newcomb BME Supplier & Service





Industry Leading Events

Networking is one of the key benefits associated with joining the BMF for many of our members. Each year we organise many high-profile events ourselves whilst also attending numerous other exhibitions and events linked to the building material supply industry.

These events are a key part of our annual activities and provide the ideal opportunity for our members to share their expertise and learn new things whilst socialising and celebrating our industry achievements.

Here are just a few of the highlights from September 2021 to October 2022:



BMF Events 2023

Burns Supper Night (Edinburgh) – 27th January 2023



63rd UFEMAT Congress (Dublin) – 20th April to 22nd April 2023



Top 100 Supplier Influencers (The Belfry) – 25th May



BMF All Industry Conference 2023 (Istanbul) – 15th June to 18th June 2023



BMF Mastermerchant (Ambleside) – 7th to 9th July 2023



BMF Members' Annual Conference & Awards 2023 – 20th to 21st September 2023



BMF Publications

The BMF continues to produce regular publications to keep members up to date with news, industry developments, market data and many other subjects of interest to its members.



Most publications are available online at www.bmf.org.uk/publications



One Voice

One Voice is the BMF's quarterly magazine, which keeps members and other key individuals informed of the BMF's many activities, be they lobbying the government for legislative changes, developing support for members or providing useful market data insights, to name but a few. One Voice also provides essential news and information on key industry events that form such a core part of the BMF diary. This magazine has a reach of over 25,000 people.



BMF Handbook and Directory

The 2022 BMF Members Handbook combines a printed handbook with an easy-to-use member directory listing the location of every BMF supplier and merchant outlet in the country.

In response to demand from supplier and merchant members this year it's bigger and better than ever. Log in and visit the member zone to download a copy.

The 2023 edition of the Handbook is due for publication April 2023.



BMF Benefits of Membership - Merchants

A new publication for 2022 which provides all of the information relating to BMF membership, and its many benefits, that a construction products supplier or service supplier would need to make the decision to join the BMF. Existing members will find it useful as it serves to remind them of the various services that they can access as BMF members.



BMF Benefits of Membership – Supplier & Service

A new publication for 2022 which provides all of the information relating to BMF membership, and its many benefits, that a construction supplier or service supplier would need to make the decision to join the BMF. Existing members will find it useful as it serves to remind them of the various services that they can access as BMF members.



Plumbing and Heating News

BMF Plumbing & Heating News is the BMFs plumbing & heating specific newsletter. Focusing on the news and guidance relating to this sector it features round-ups and previews of events, market data and member news.

BMF plumbing and heating members receive an online copy of this publication and a printed copy can be obtained on request.

The next edition will be available Spring 2023.



BMF At A Glance

This popular leaflet gives you all the facts about the BMF organisation including the vision, mission and values by which we operate, our goals and the activities we undertake to reach them and the key benefits available to our members.

Contact us for Special BMF member pricing

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CRANES

We can supply both Builders Merchant and Timber specification cranes directly from UK STOCK with fitting times as low as 2 weeks dependent on the chosen specification. Atlas offers the most effective builders merchants cranes in the market. Whole life costs can be dramatically reduced by signing up to a repair and maintenance contract (for up to 10 YEARS) at a fixed monthly cost therefore inflation proofing your business and giving you the peace of mind of manufacturers' care without any of the unexpected costs.



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- ATLAS Head Office (+ number of engineers)
 ATLAS Aftersales Dealers (+number of engineers)
- ATLAS Attersales Dealers (+number)
 ATLAS Mobile Engineers





A range of **gloves** for all the jobs you do!







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Exclusively available from Keypoint sales@keypoint-uk.co.uk

MaxiTherm