

# Highlights from the EDA's Q2 2026 State of the Sector Survey

EDA Member Wholesalers  
EDA Affiliated Manufacturers

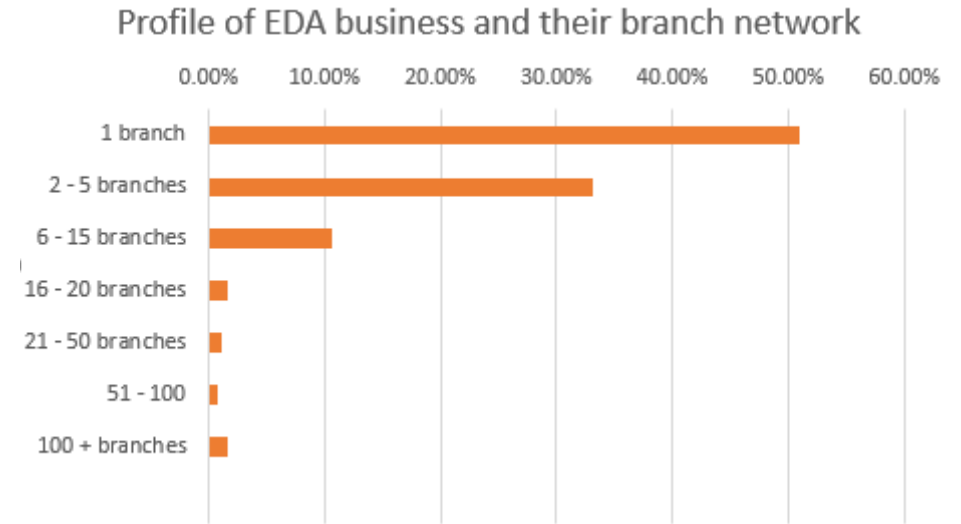
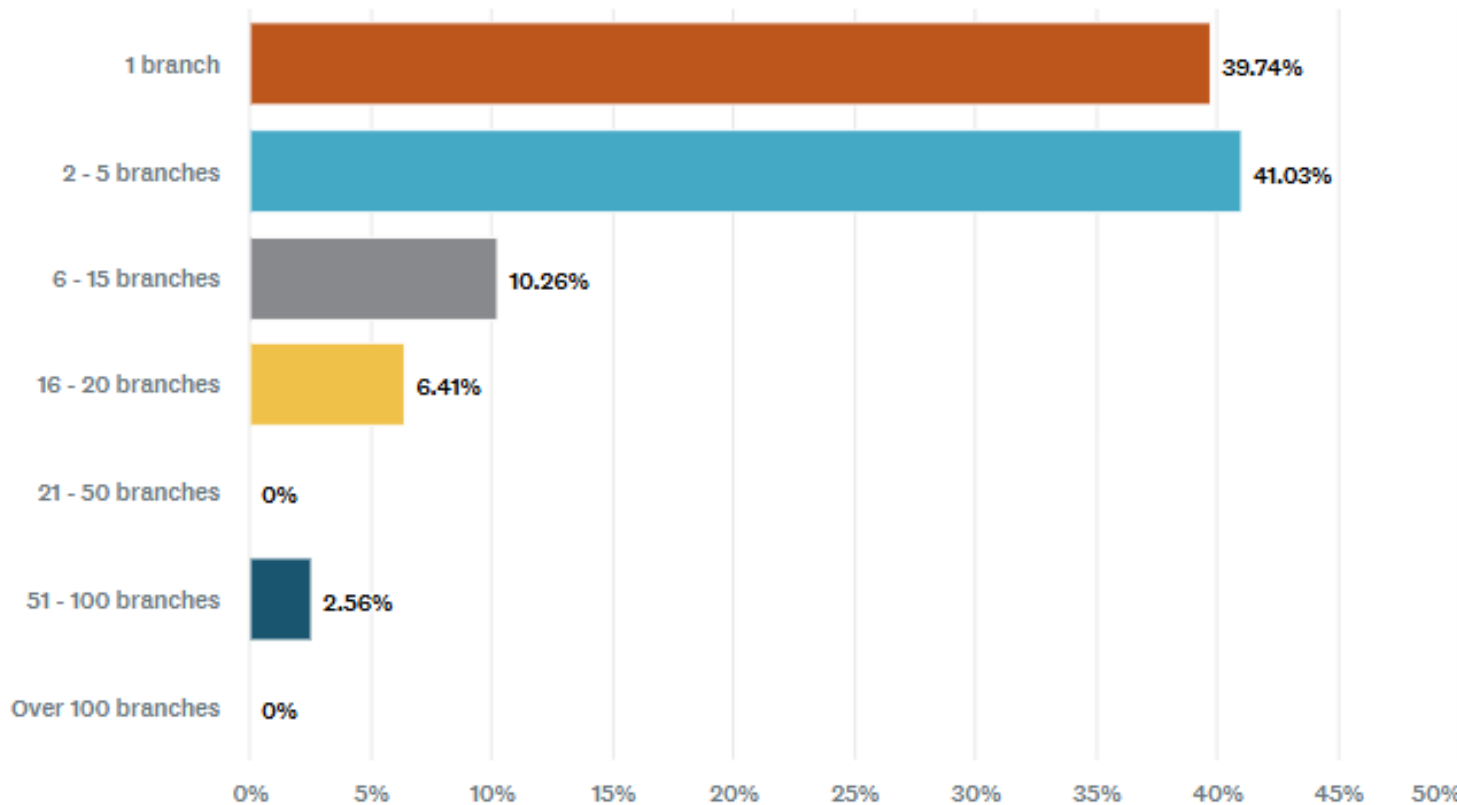


**Anne Vessey**  
**Head of Marketing**  
**& Communications**



# Wholesaler responses: 78/ 267 businesses

Response rate: 29%



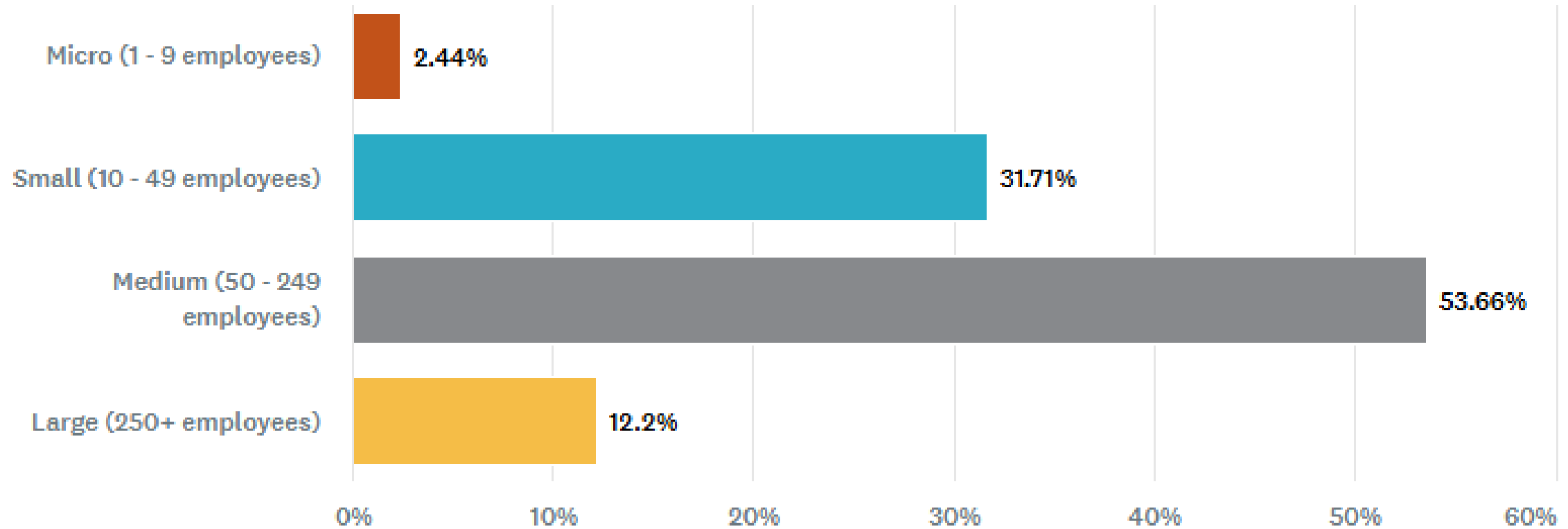
**Respondents represent  
c. 500 branches**

**Collectively, EDA business  
run 1,916 branches**

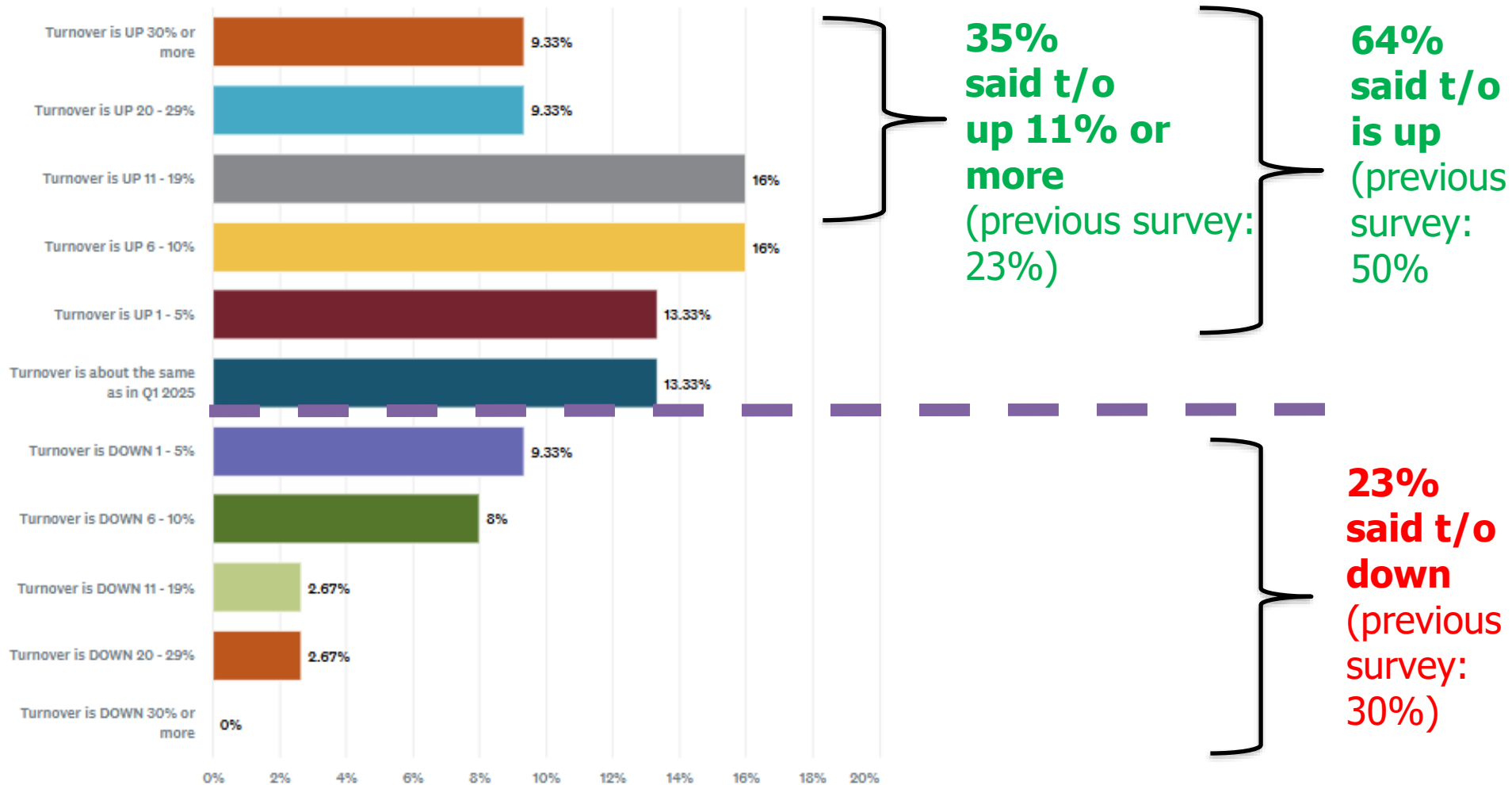
# Manufacturer responses: 41 / 118 businesses

Response rate: 35%

Talking Shop  
Live Online:  
Industry Insight  
in 90 Minutes



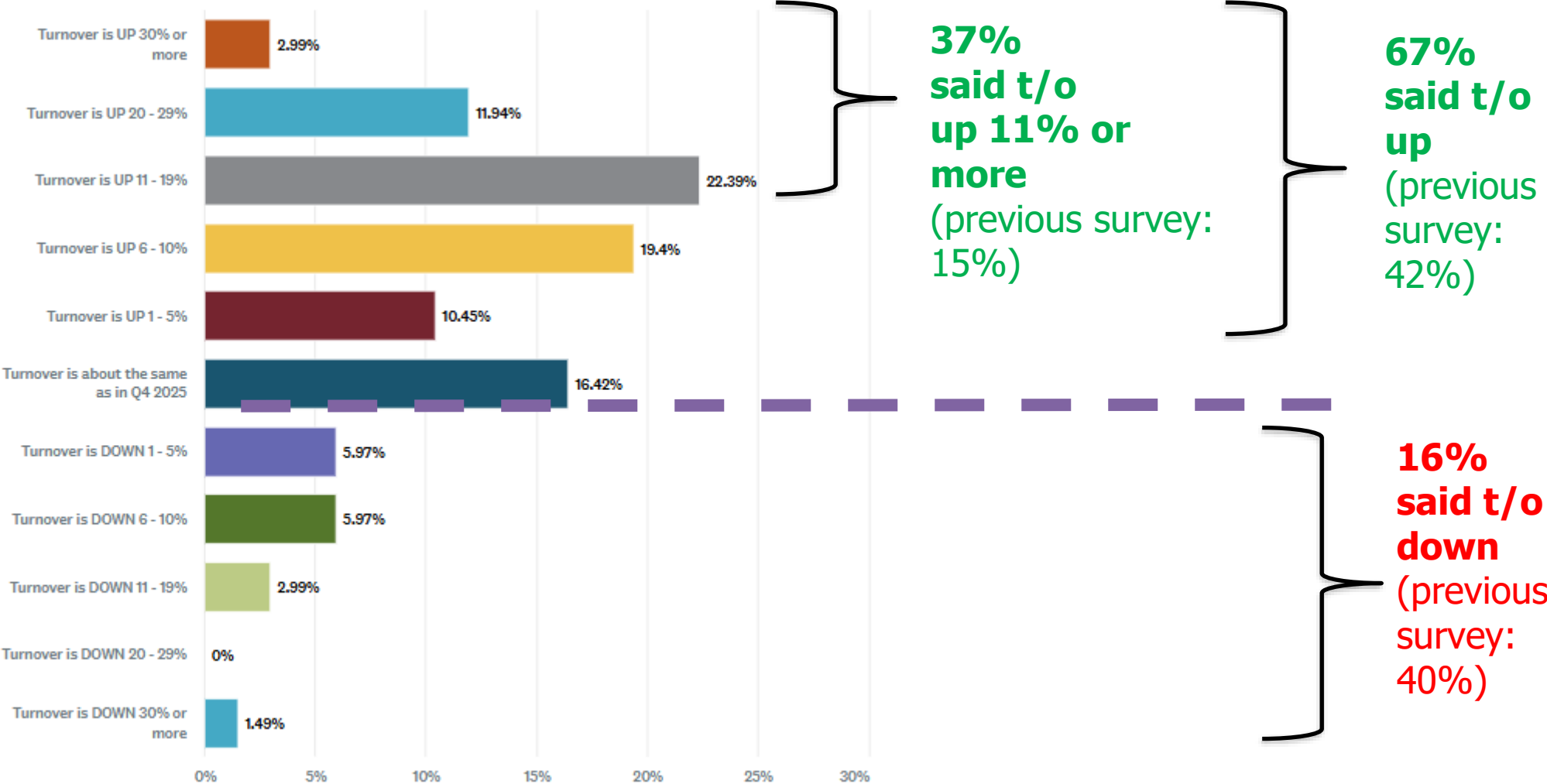
# Wholesalers: Comparing turnover in Q1 2026 with Q1 2025



"Turnover has increased but margin is under heavy pressure from on-line sellers and wholesalers desperate for business."

"Down 5.8% - driven by an unusually large Jan 2025 figure which was a number of large lighting projects kicking off in commercial sector."

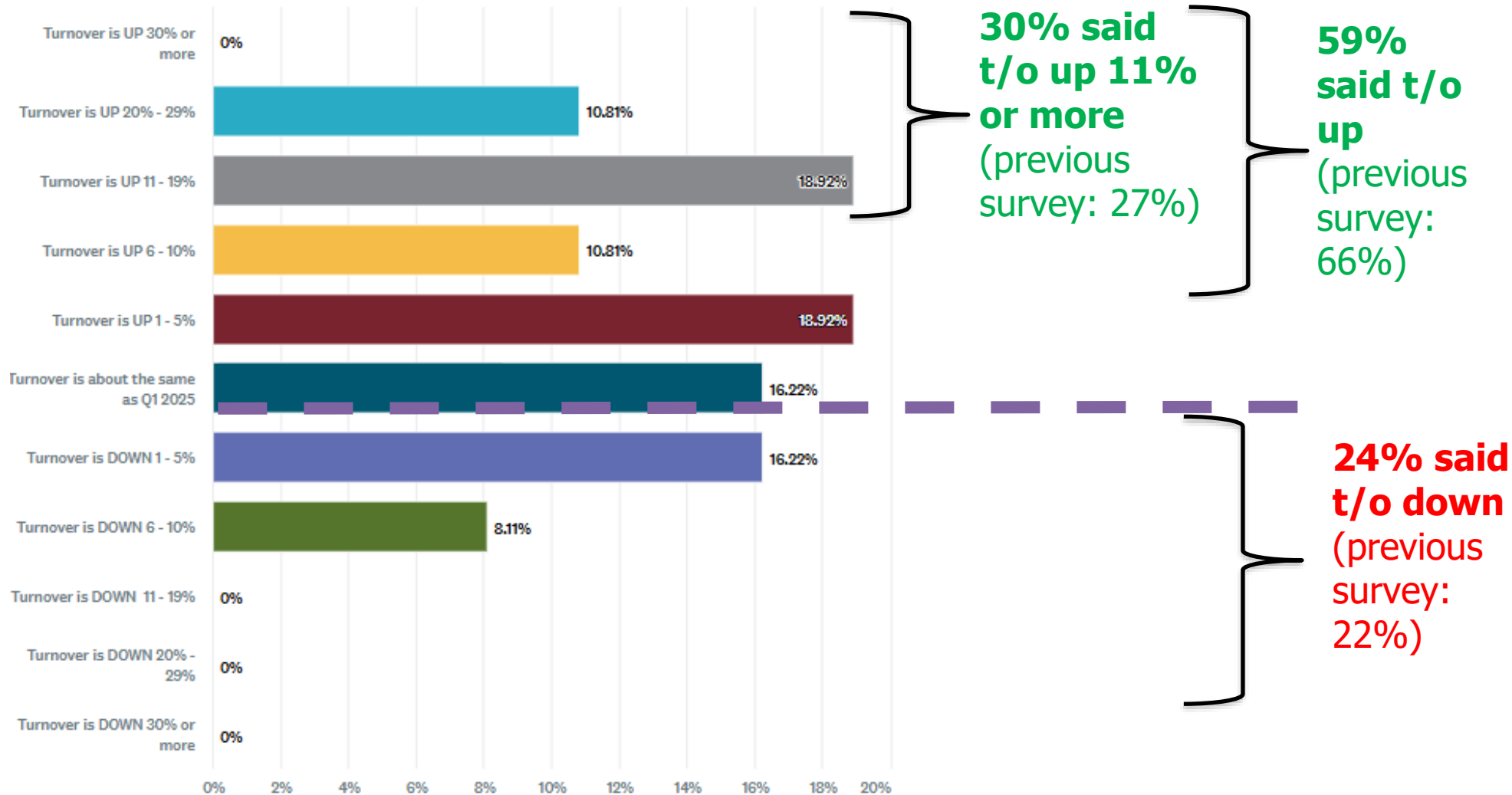
# Wholesalers: Comparing turnover in Q1 2026 with previous quarter Q4 2025



“Q1 is always better than Q4 because of Xmas.”

“Down 8.9% due to strong Q4 2025 result”

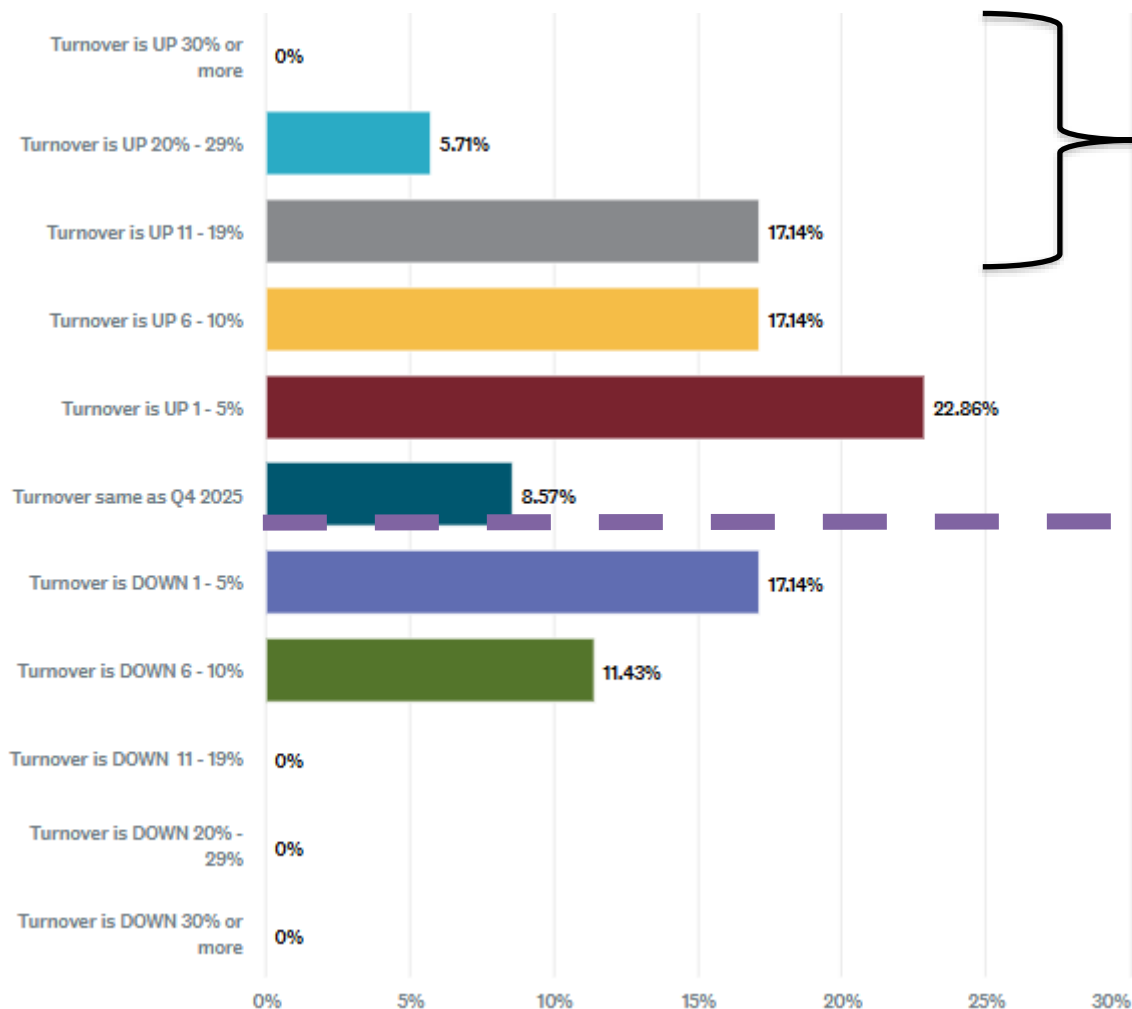
# Manufacturers: Comparing Q1 2026 turnover with Q1 2025



“2026 has closed as a Record Q1”

“Poor January, business improved in February and March. Concerned about April due to consumer confidence.”

# Manufacturers: Comparing Q1 2026 turnover with Q4 2025



**23% said t/o up 11% or more (previous survey: 26%)**

**63% said t/o up (previous survey: 66%)**

**29% said t/o down (previous survey: 22%)**

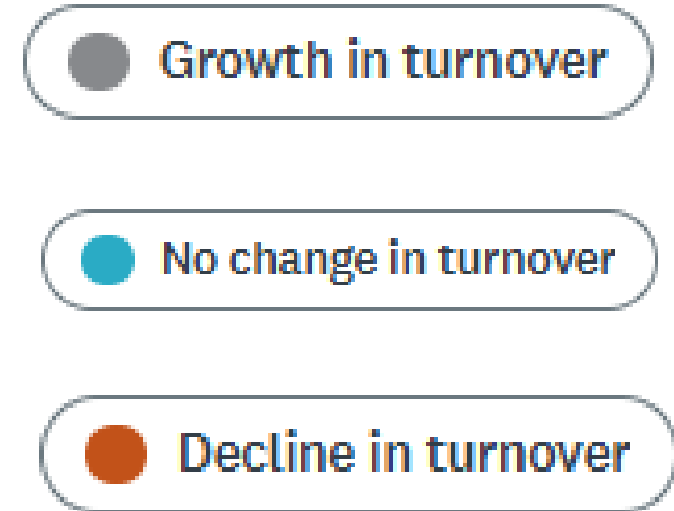
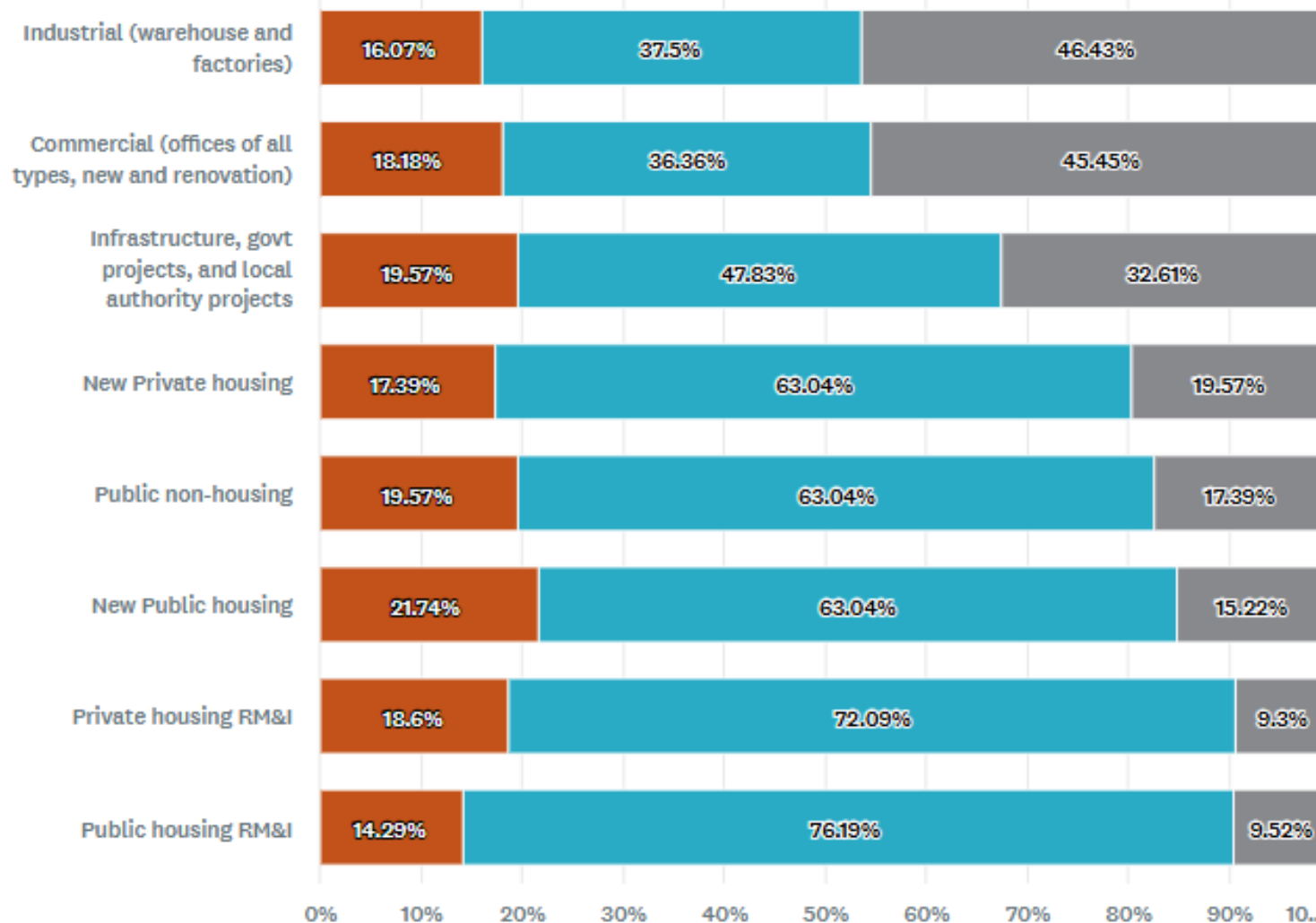
"We don't compare. This include no account of reasonability and would be misleading."

"This is a typical year on year trend for our business."

"Q4 is our busiest period due to seasonality."

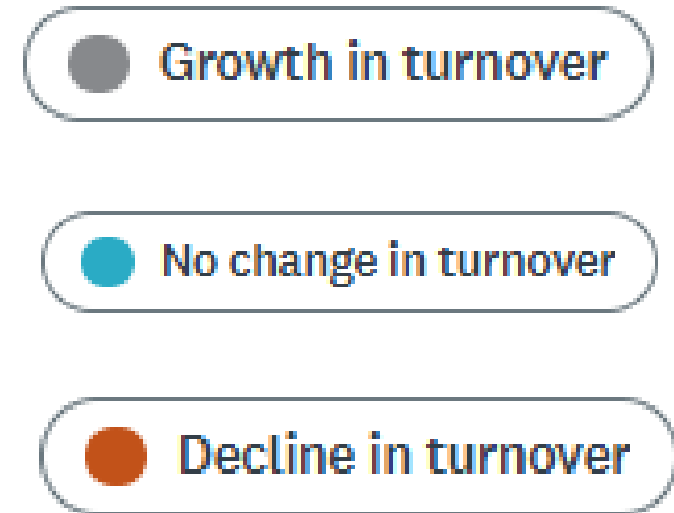
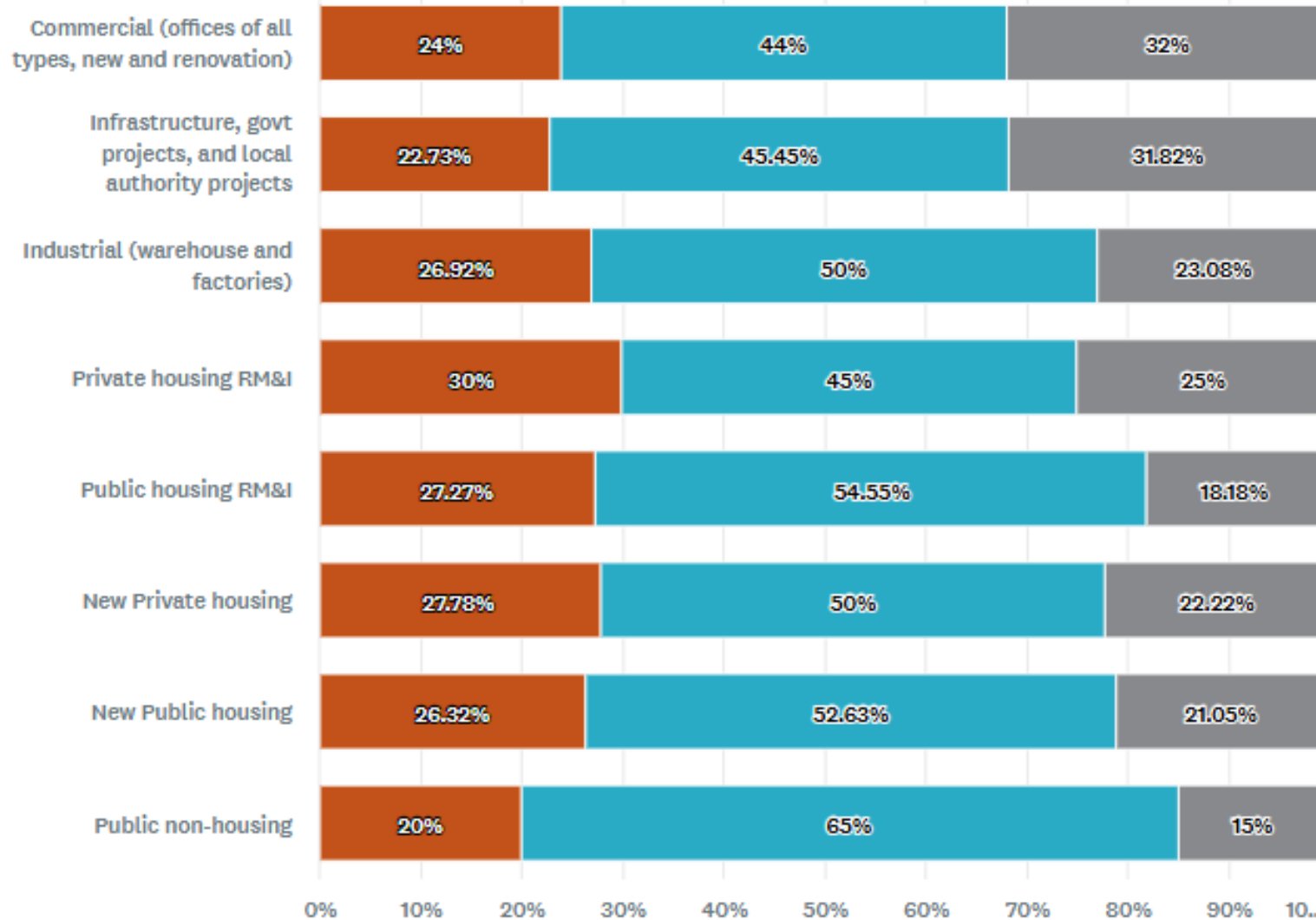
# Wholesalers: Have you experienced a change in turnover in Q1 2026 compared to Q4 2025 for the following sectors?

## Grey band indicates growth



# Manufacturers: Have you experienced a change in turnover in Q1 2026 compared to Q4 2025 for the following sectors?

## Grey band indicates growth



## Comments on particular areas of growth

### Wholesalers

“Renewable projects, EV Chargers.”

“Commercial, steel cable management and power cables. Private housing with heat pumps, PV and battery storage.”

“Renewables.”

“Data centres.”

### Manufacturers

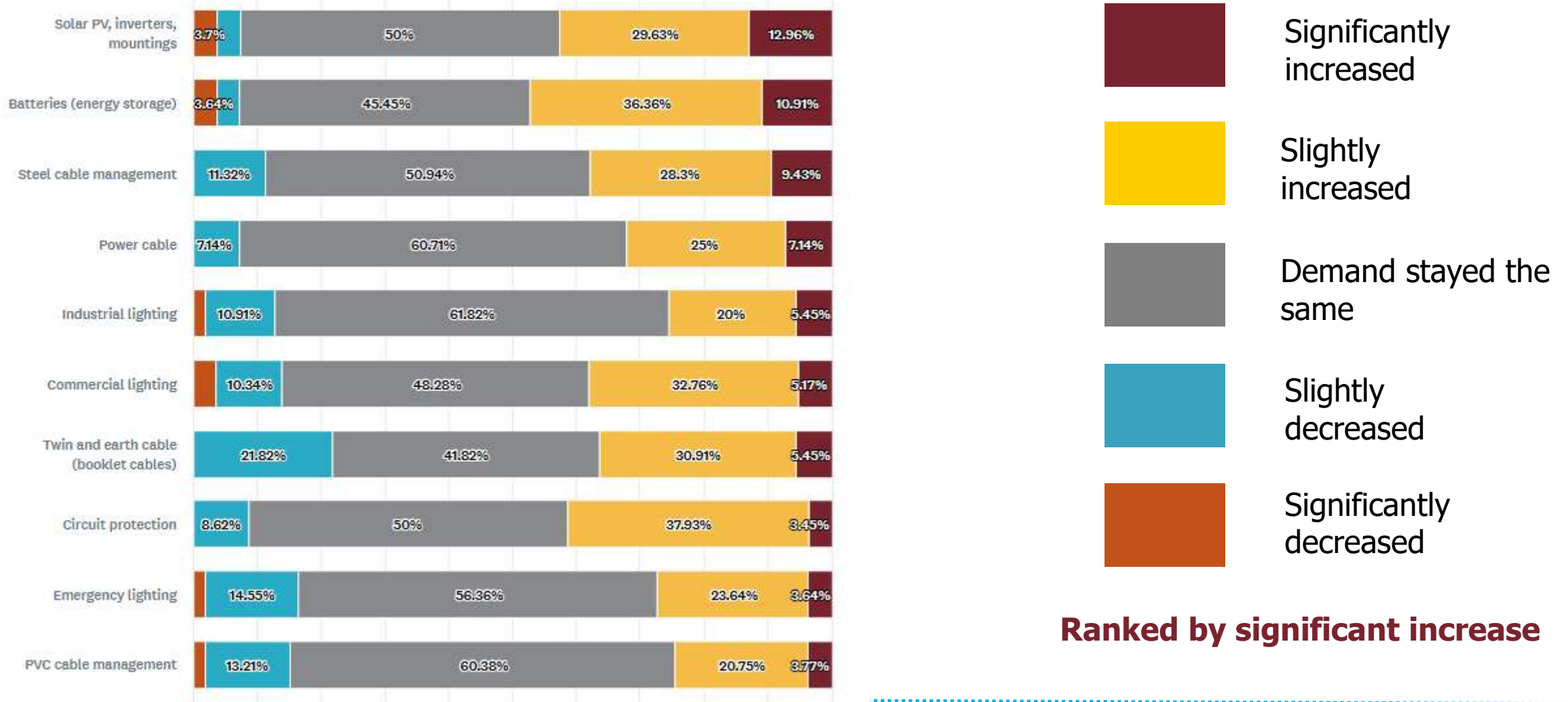
“Generally we are informed that the sectors we interact with are down. If we grow sales in a period our concern is we are overstocking our customers leading to future slow sales months.”

“Renewables.”

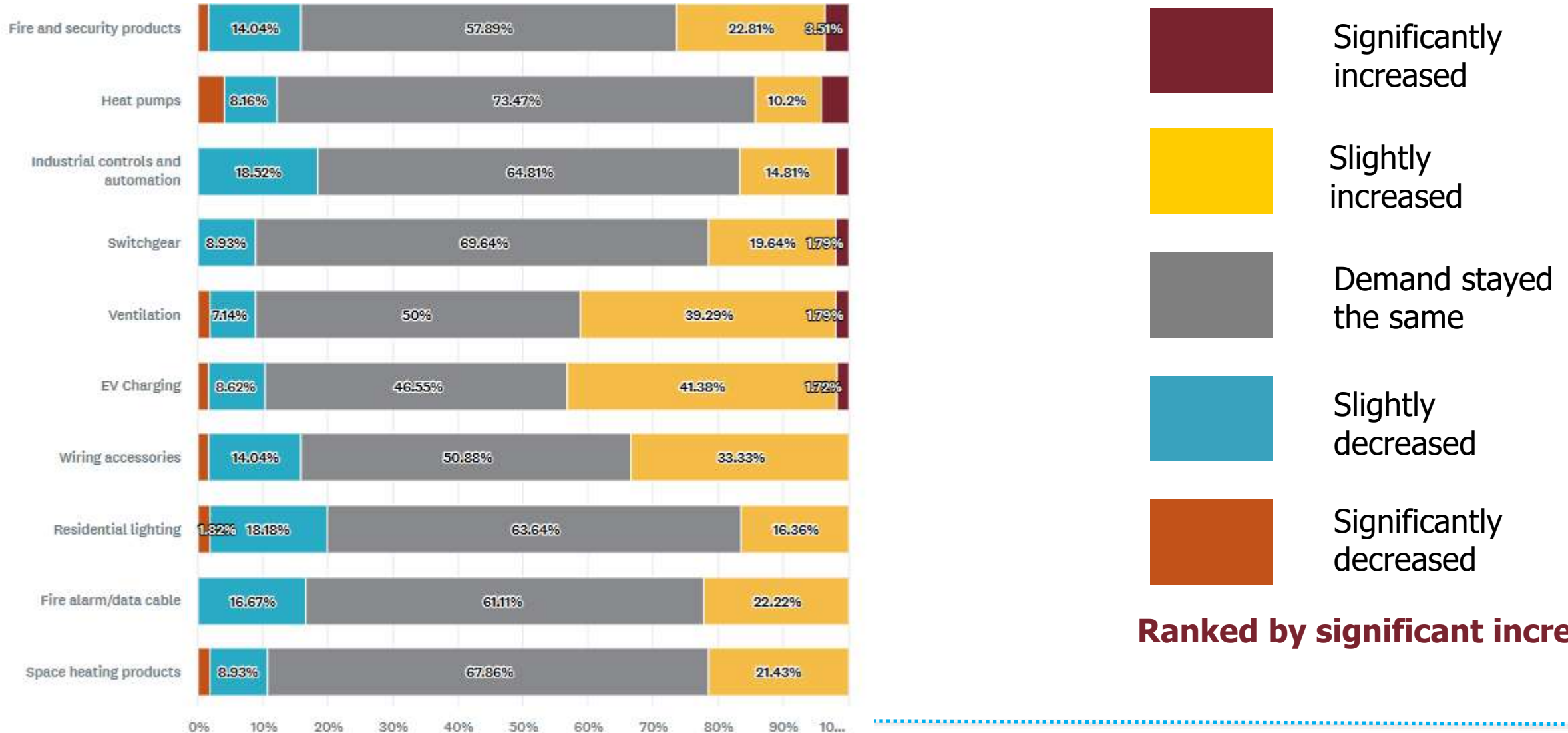
“Data centres continue to grow, both in the UK & Globally.”

“Due to a bulk stock order that we are up.”

# Wholesalers: has there been any change in demand for the following products in Q1 2026 compared to Q4 2025?

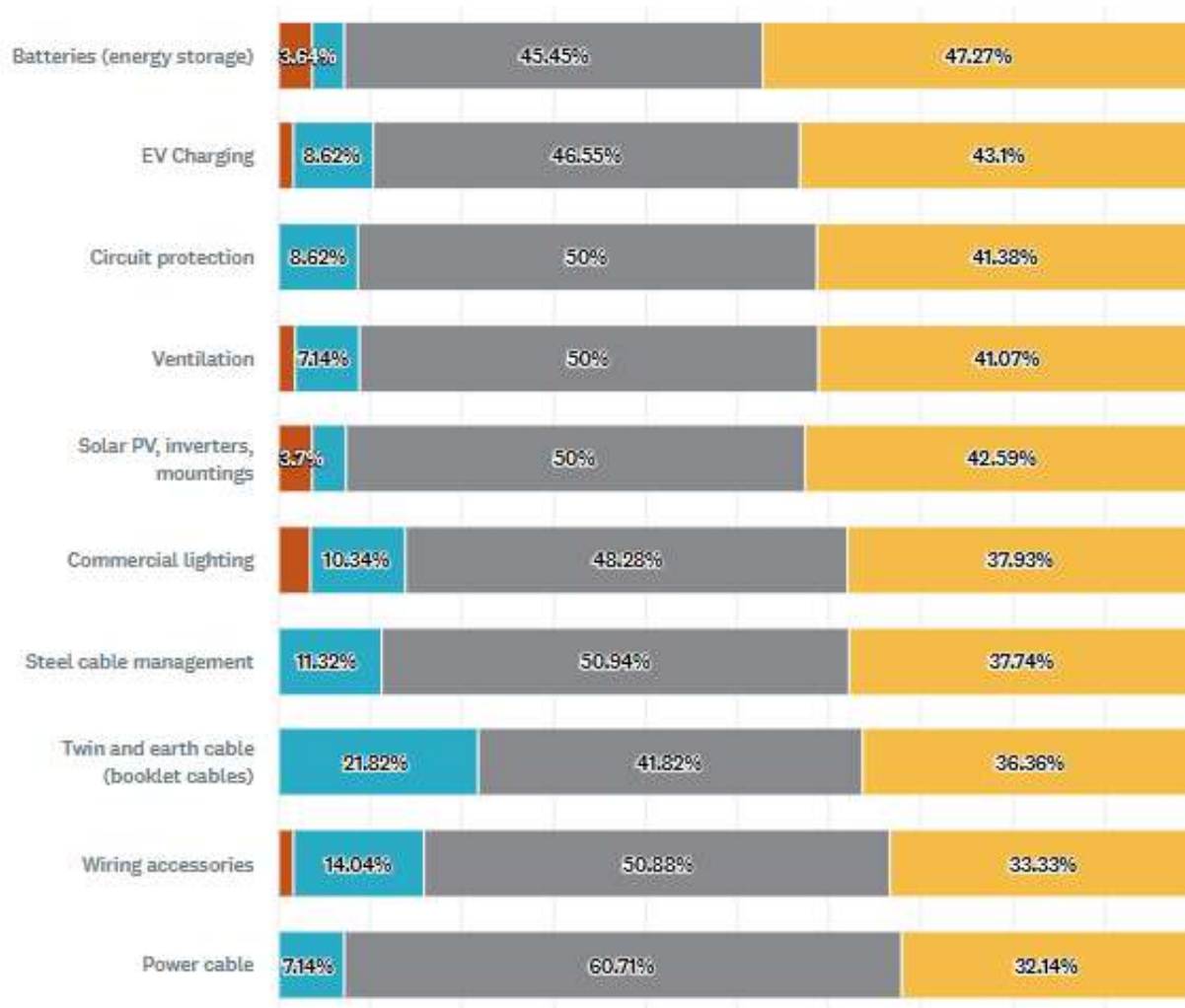


# Wholesalers: has there been any change in demand for the following products in Q1 2026 compared to Q4 2025?



Ranked by significant increase

# Wholesalers: has there been any change in demand for the following products in Q1 2026 compared to Q4 2025?



Merging 'Significantly Increased' with 'Slightly increased' to show a general growth profile.



Significantly increased



Slightly increased



Demand stayed the same

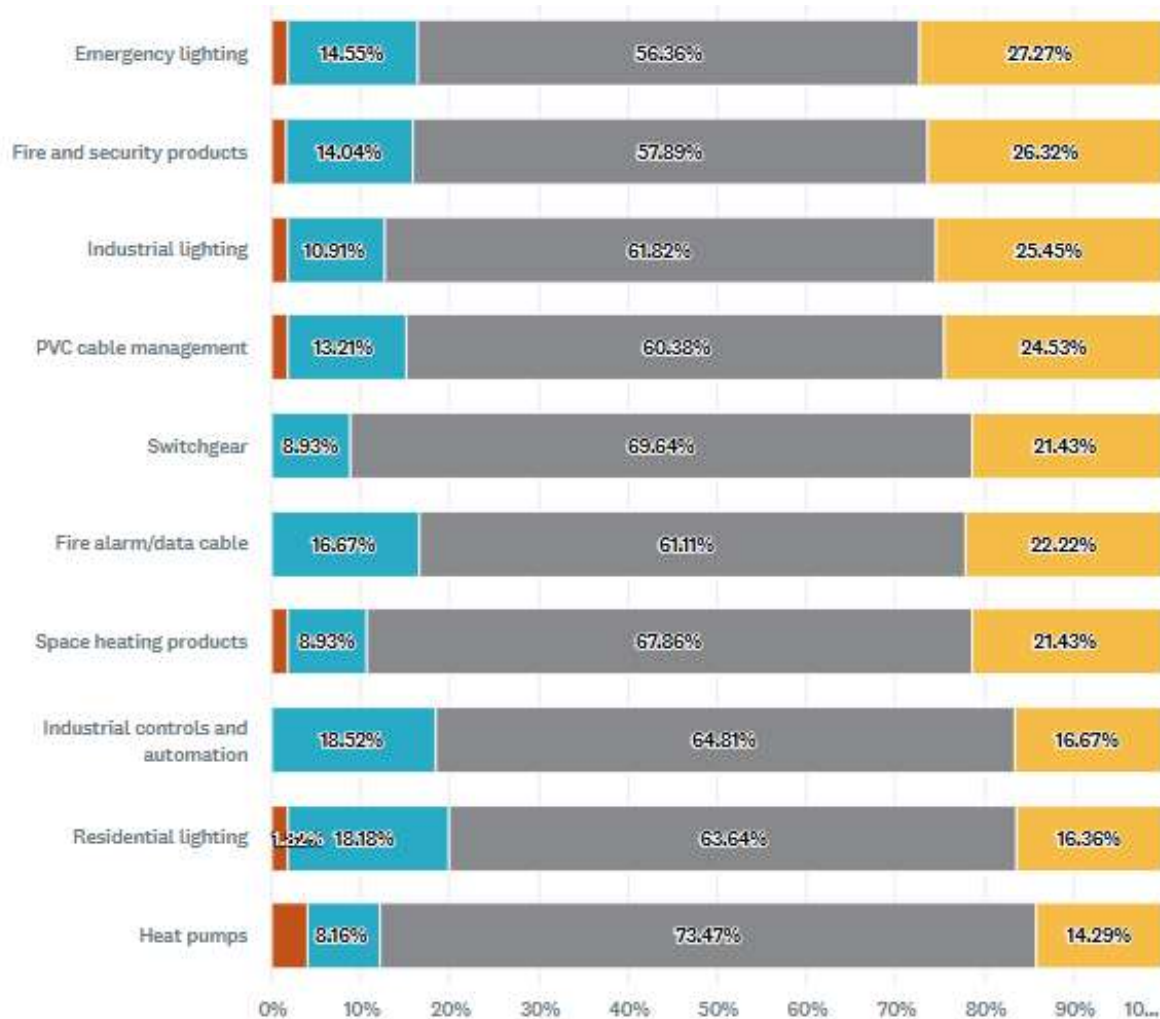


Slightly decreased

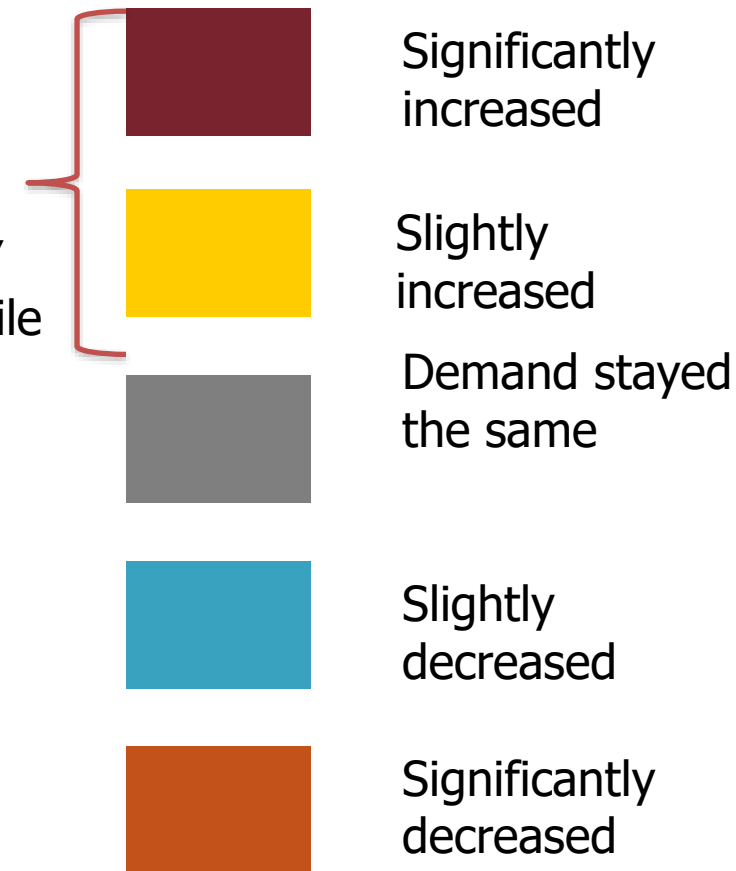


Significantly decreased

# Wholesalers: has there been any change in demand for the following products in Q1 2026 compared to Q4 2025?



Merging 'Significantly Increased' with 'Slightly increased' produces this profile



# Wholesalers: Your 5 most pressing operational challenges

	April 2025	July 2025	October 2025	January 2026	April 2026
1	<p><b>Inflation in business overheads and passing these on to customers</b></p> <p>+</p> <p><b>Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill</b></p>	<p><b>Online prices making margins tight</b></p>	<p><b>Increasing business overheads</b></p>	<p><b>Increasing business overheads</b></p>	<p><b>Increasing business overheads</b></p>
2	<p><b>Online prices making margins tight</b></p>	<p><b>Inflation in business overheads and passing these on to customers</b></p>	<p><b>Delays to project starts</b></p>	<p><b>Downturn in market demand</b></p>	<p><b>Middle East Crisis</b></p>
3	<p><b>Difficulties attracting and recruiting staff</b></p>	<p><b>Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill</b></p>	<p><b>Downturn in market demand</b></p>	<p><b>Delays to project starts</b></p> <p>+</p> <p><b>A slowdown in my traditional market segments</b></p>	<p><b>Downturn in market demand</b></p>
4		<p><b>A slowdown in the start of projects</b></p>	<p><b>Cash flow related issues</b></p>	<p><b>Difficulties attracting, recruiting or retaining staff</b></p>	<p><b>Difficulties attracting, recruiting or retaining staff</b></p>
5		<p><b>Product price increases and passing these on to customers</b></p>	<p><b>Difficulties attracting, recruiting or retaining staff</b></p>	<p><b>New competitors entering the market</b></p>	<p><b>Delays to project starts</b></p>

# Manufacturers: Your 5 most pressing operational challenges

	April 2025	July 2025	October 2025	January 2026	April 2026
1	Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill	Slowdown in the start of projects + Upward pressure on all wages driven by the increases in National Living Wage and National Minimum Wage on my overall wage bill	Increasing business overheads + Delays to project starts	Increasing business overheads	Increasing business overheads
2	The slowdown in my traditional market segments	Inflation in business overheads	Downturn in market demand	Downturn in market demand	Middle East Crisis
3	Inflation in business overheads	The slowdown in my traditional market segments	Difficulties attracting, recruiting or retaining staff	Delays to project starts + A slowdown in my traditional market segments	Downturn in market demand
4		Transport and logistics costs + Difficulties attracting and recruiting staff	The slowdown in my traditional market segments	Difficulties attracting, recruiting or retaining staff	A slowdown in my traditional market segments
5.		Product price deflation	New competitors entering the market	New competitors entering the market	Delays to project starts

## **Wholesalers**

“Rising costs, in particular staff costs, outstripping our ability to retain profit as the internet chips away on the other end.”

“Continual price erosion caused by online re-sellers.”

“Continued legislative burdens from the government, increasing admin workload.”

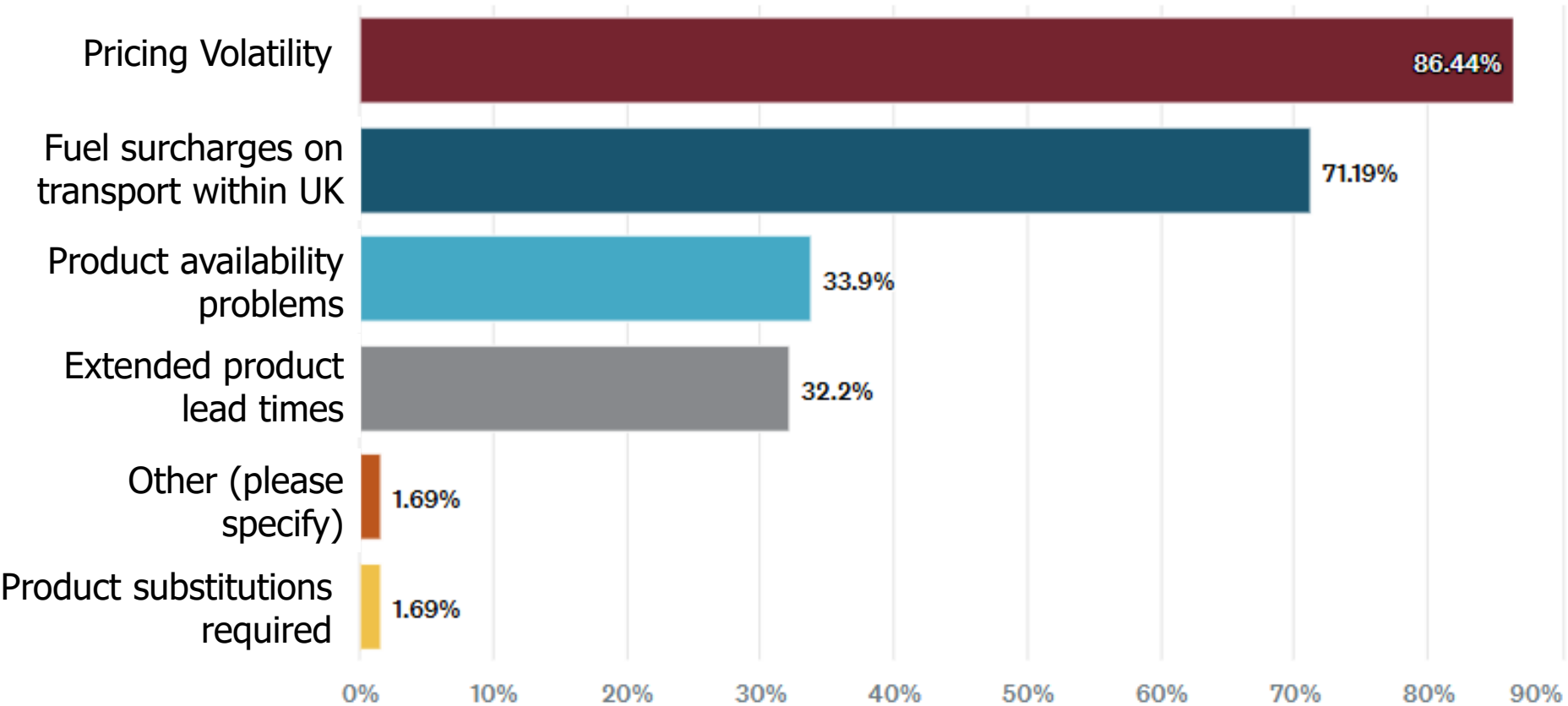
“Middle East crisis probably makes top 5 in 3-6 months time if not resolved.”

“Dealing with fast growth.”

## **Manufacturers**

“We are concerned about customer debt, even if we are paid this does lead to de-stocking. Project delays can always be an issue.”

# Wholesalers: As a result of the Middle East conflict, which of the following have you experienced? Please tick all that apply.

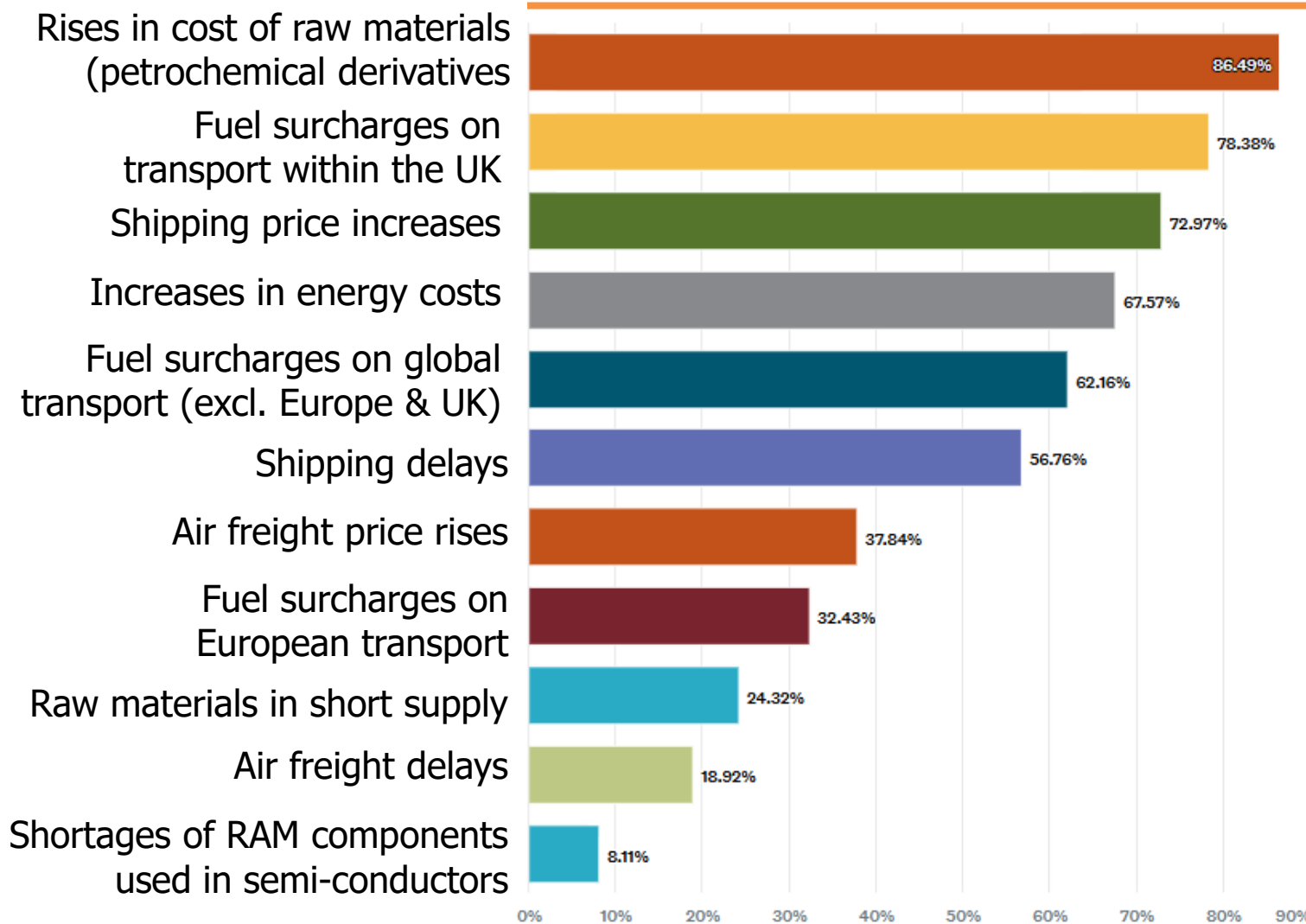


“Some suppliers delaying price increases and multiple price increases already year to date. Likely delayed price increases to go higher than expected or surcharges.”

“Increased demand for renewable products”

“Customers’ spending confidence. Likely impact on running costs e.g. bills”

**Manufacturers:** As a result of the Middle East conflict, which of the following have you experienced? Please tick all that apply.



"Just adds more uncertainty to an already fragile level of investor confidence."

"Customer confidence."

"Lowering of consumer confidence."

"Uncertainty with customers."

"Travel to FE is more difficult."

# Manufacturers: What raw materials are most at risk or are already in short supply?

- Steel
- Electronics
- Oil is a key component in the production of PVC / Plastics (multiple responses)
- Metal die casting
- Precious metals
- **Tungsten** is where we are seeing significant increases
- Electronic components supply was already under pressure. Whether the conflict is used as an excuse for further delays remains to be seen.
- European copper lead times increasing weekly, all now 26wk
- Resins
- Aluminium

InvestorNews

## Why Tungsten Has Jumped to No. 1 on the World's Critical Minerals Hot List

In an era when supply chains are weaponized and stockpiles have quietly vanished, tungsten has moved from an obscure industrial input to the...

23 Jan 2026



Reuters

## Tungsten rises to record highs as export curbs turn up supply heat

Tungsten prices have rocketed to record highs in January, fuelled by tightening inventory, Chinese export controls and industrial demand,...

28 Jan 2026



Bitget

## Tungsten prices have surged more than fourfold in over a year, marking a critical period for industry chain transformation

Recently, companies across the tungsten industry chain have launched a new round of price adjustments, covering tungsten raw materials...

1 month ago



TradingView

## Tungsten Prices Surge 557% as China Export Limits Tighten Global Supply

A metal rarely discussed outside mining circles is suddenly commanding attention across defense and technology supply chains. Tungsten...

1 month ago



Investing News Network

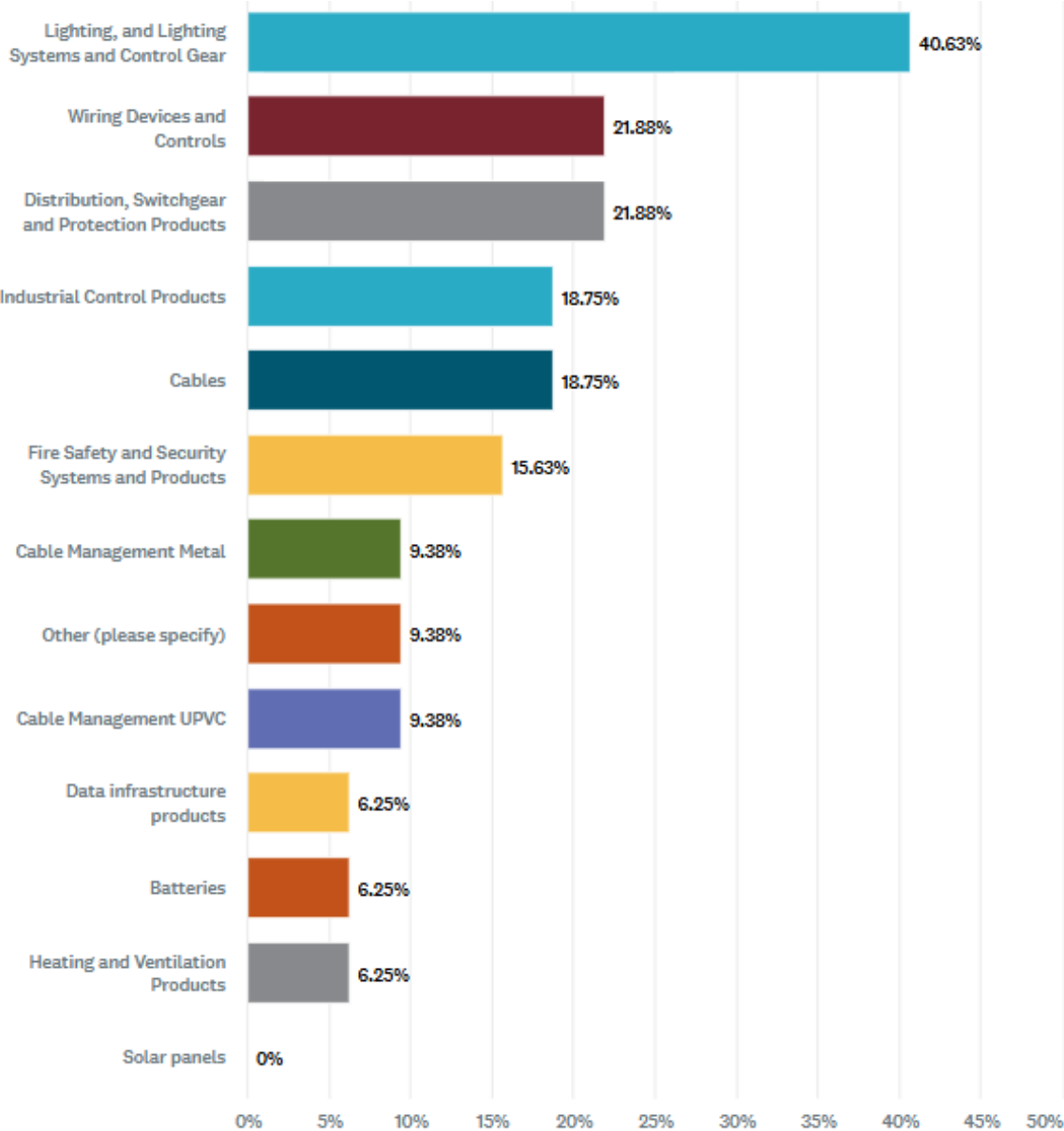
## Defense Metal Tungsten Outpaces Gold, Copper in Massive Price Rally

Tungsten is widely used in armor-piercing ammunition, aircraft components, drilling equipment and industrial cutting tools. Close-up of...

1 month ago



**Manufacturers:** Which of your product types are most likely to be impacted by the conflict in the Middle East? Please tick all that apply.

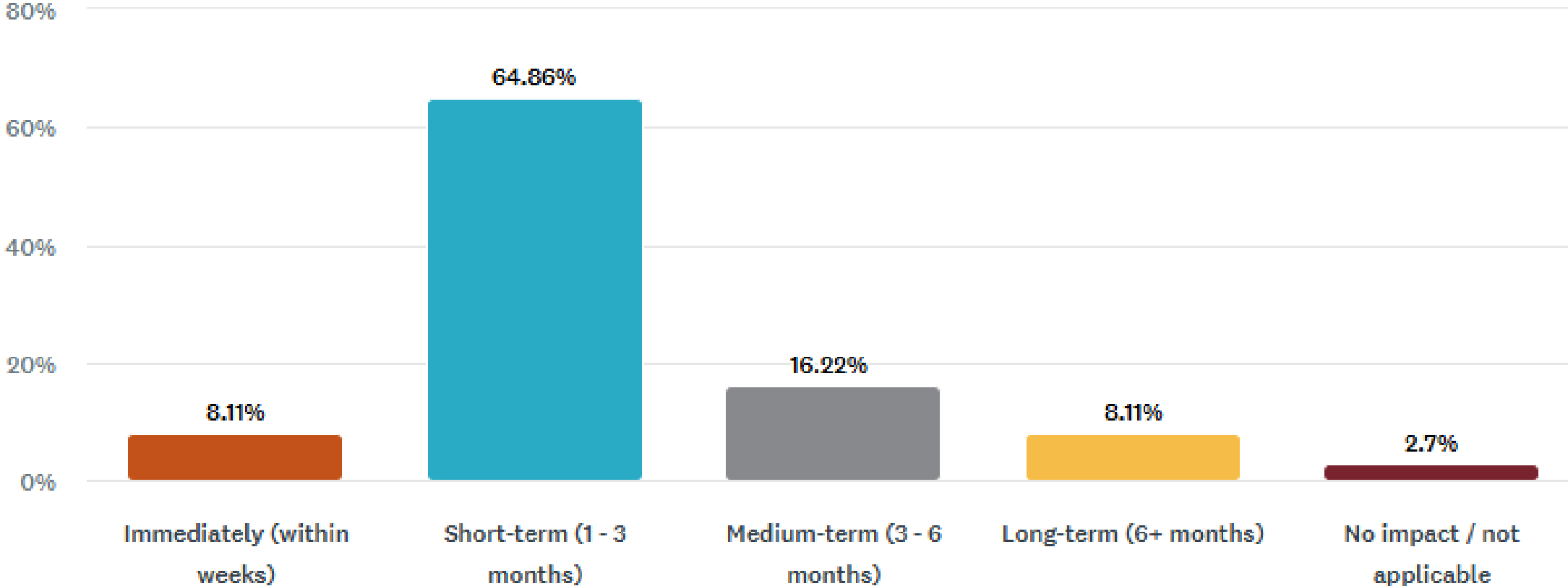


“The majority of our products use electronic components.”

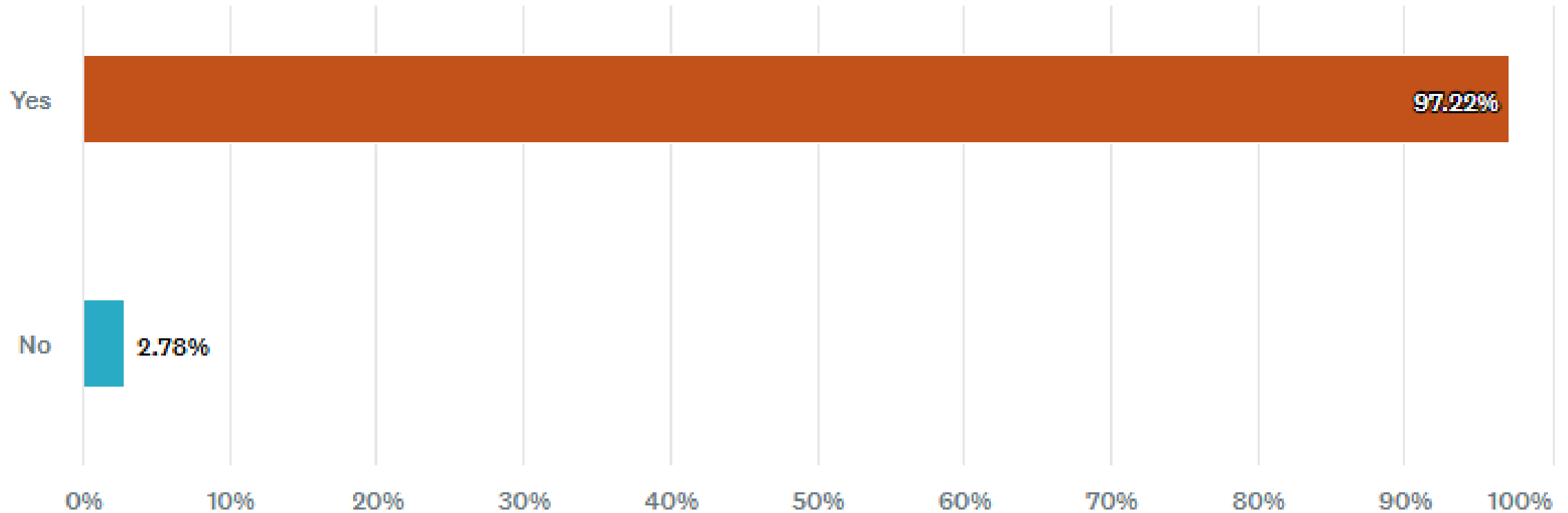
“Raw materials”

“All of them!”

# Manufacturers: How quickly do oil price changes feed into your production costs?



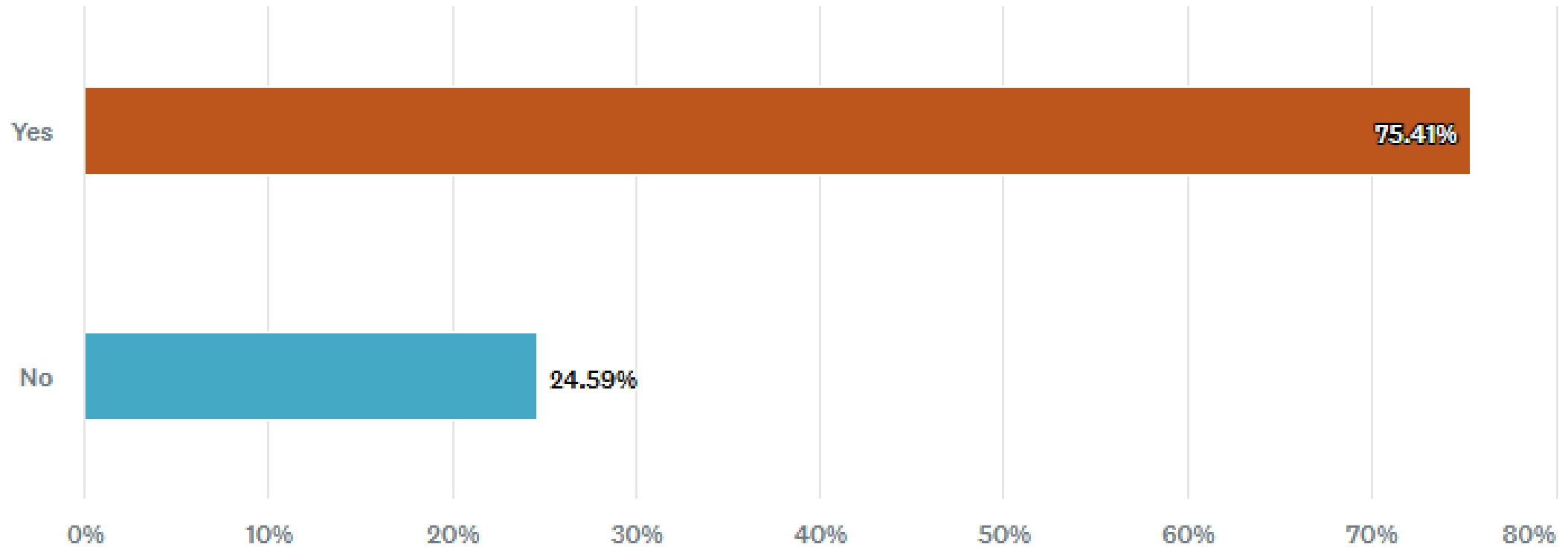
**Manufacturers:** Have any of **your suppliers** already notified you that they will be introducing price increases?



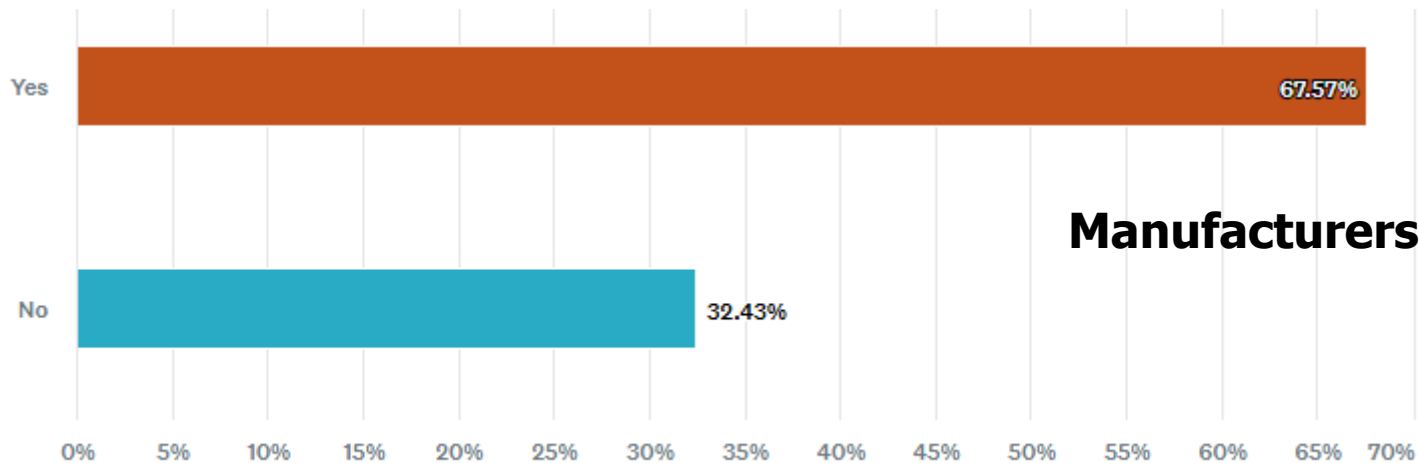
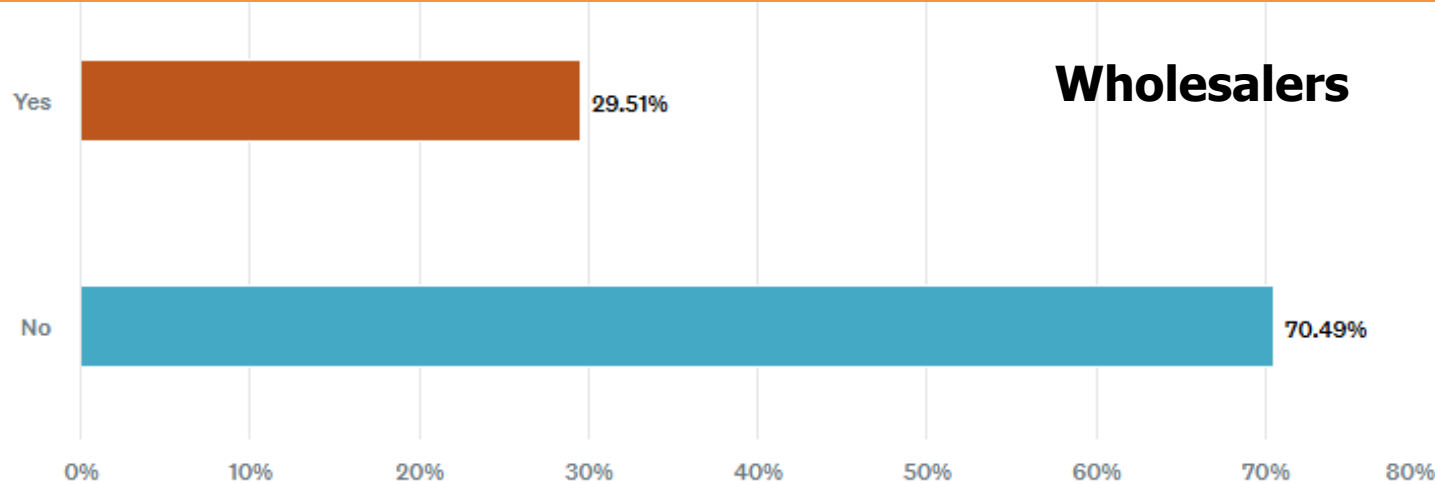
## Manufacturers: Comments about your suppliers and the topic of price increases.

- Silver and copper is constantly being reviewed
- There was already discussion about price increases and the ME conflict just added to the pressure
- Expect the costs to continue to soar as the impact of oil price and supply challenges on China continue to grow.
- Typically 3-5% currently
- Plastics / Price increases of 10%+ in plastics
- Nearly every supplier, or our own factories, have price increases. We are shouldering some of these, our price increase to the Wholesale market does not cover them all
- It is mostly transportation suppliers, but products containing **tungsten** and shortly other metals as well, are seeing increases (whether the latter is due to Middle East I'm not sure)
- Price increases vary based on the amount of copper or plastic they contain.
- We are being advised of increases in excess of 20%
- Copper pricing volatile, 44% increase since the start of the year

**Wholesalers:** Have any of your manufacturer suppliers already notified you that they will be introducing price increases as a result of the Middle East crisis?



# Do you have a contingency plan in place for dealing with the volatility of costs which may result from the ongoing Middle East crisis?



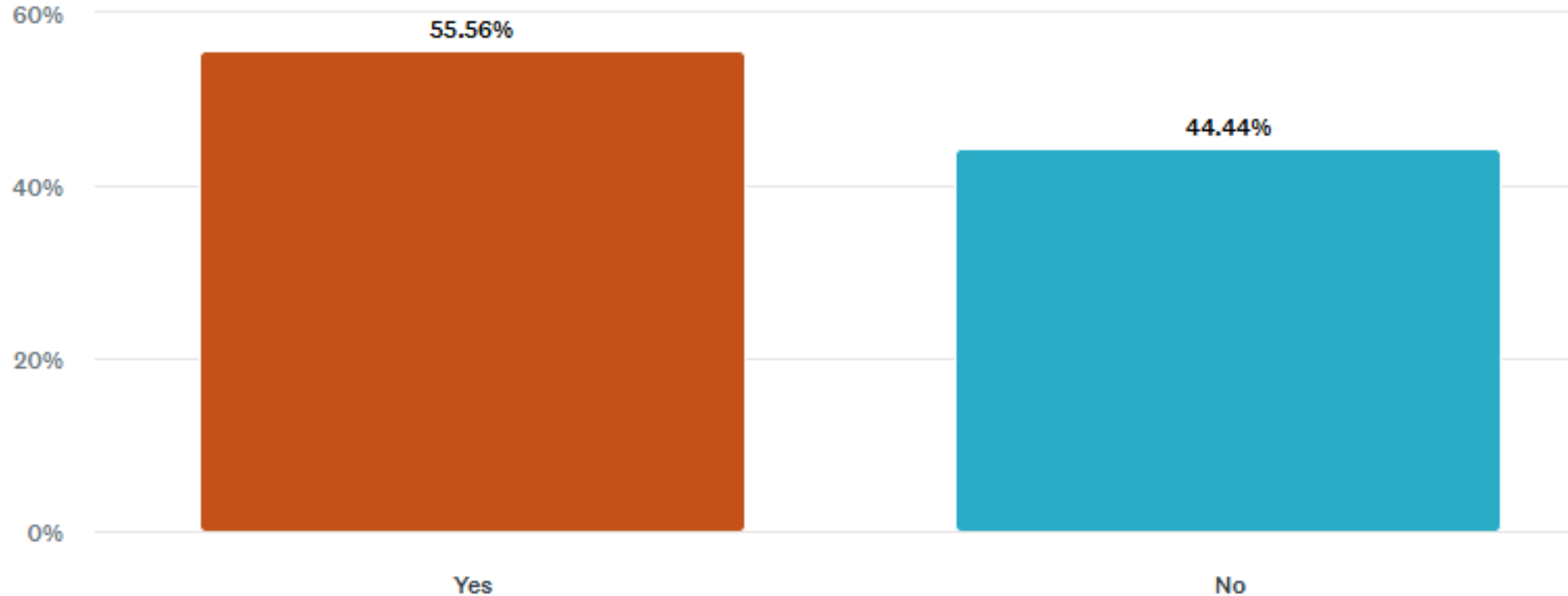
## **Wholesalers:** If applicable, what does that contingency planning involve?

- Constantly monitoring incoming costs and acting proportionately within our own pricing structure
- Bulk ordering fast moving lines prior to increases with a view to increasing margin when price increases take hold in the market
- Contingency plan would be buying more of certain stock to hold margin in the future.
- Raising Prices / Put our prices up / Passing on invoice costs
- Reviewing existing contracts
- Alternative suppliers
- Sourcing from alternative suppliers
- Increase selling prices where necessary
- We must only purchase from EU GB companies
- FYI **no supplier has cited the Middle East crisis** as the main reason but they have done price increases.

## **Manufacturers:** If applicable, what does that contingency planning involve?

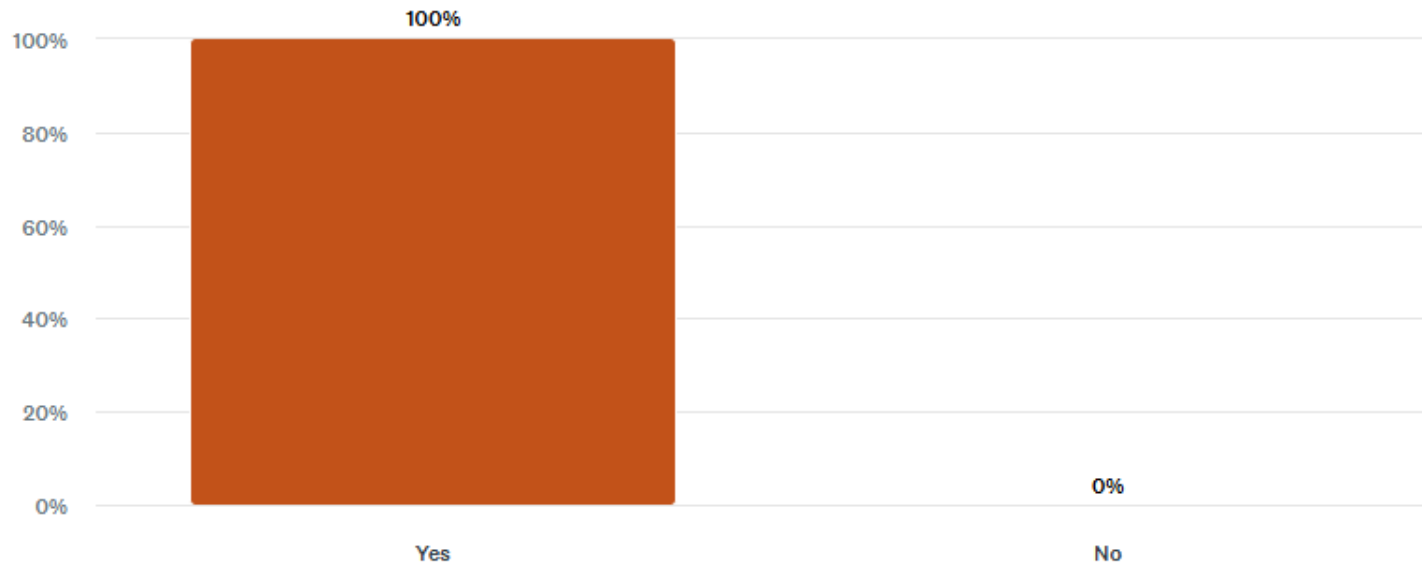
- Increasing our sales prices accordingly / Putting up prices
- Re-routing supply
- Purchasing 6 months stock in March at original prices
- Introduced solar panels to deal with local energy costs - other than that may have to consider further price rises
- Some contingency is safety stock levels
- Alternative supply chain options
- Stock levels, hedged supply pricing
- Alternative sourcing where appropriate.
- Price increase deferments, which is only delaying the inevitable.
- Longer lead times, drawing stocks from parent company
- We generally hold around 6 months of raw materials, so impact may be avoided IF there is a swift resolution, confidence not high on that one
- How can you plan for something like this!

**Manufacturers:** As at end March 2026, had you already implemented a price increase this year?



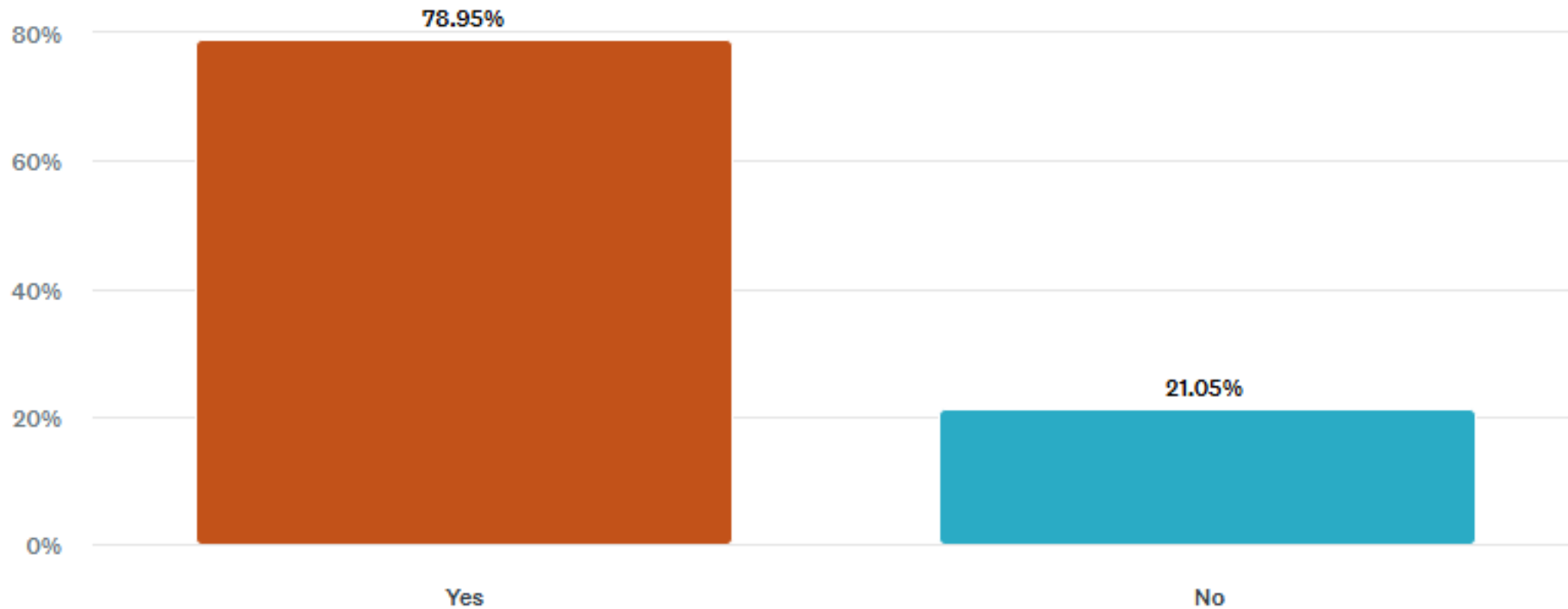
**Manufacturers:** To those that had not implemented a price increase as at end March 2026 we asked...

## Are you planning a price increase (or more than one) in 2026?

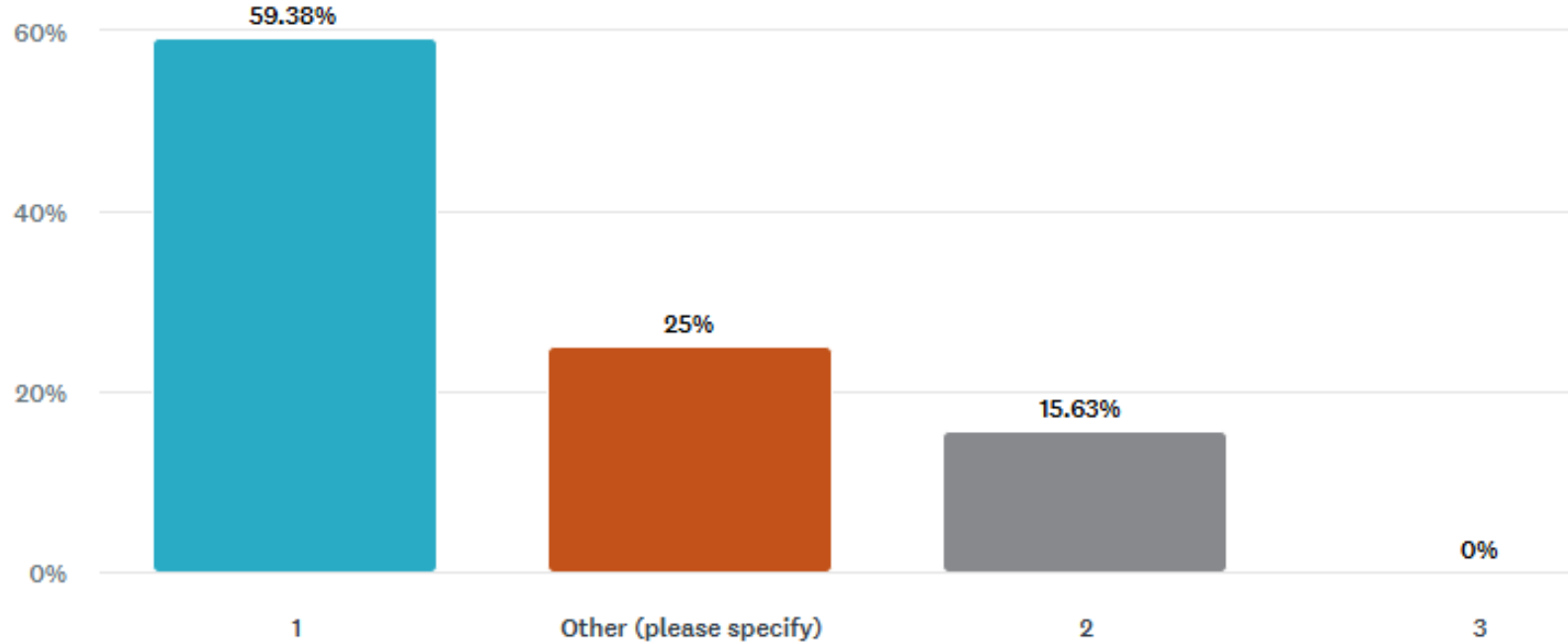


**Manufacturers:** To those answering YES, as at end March 2026 we had already implemented a price increase this year, we asked...

## Are you planning a further price increase (or more than one) in 2026?



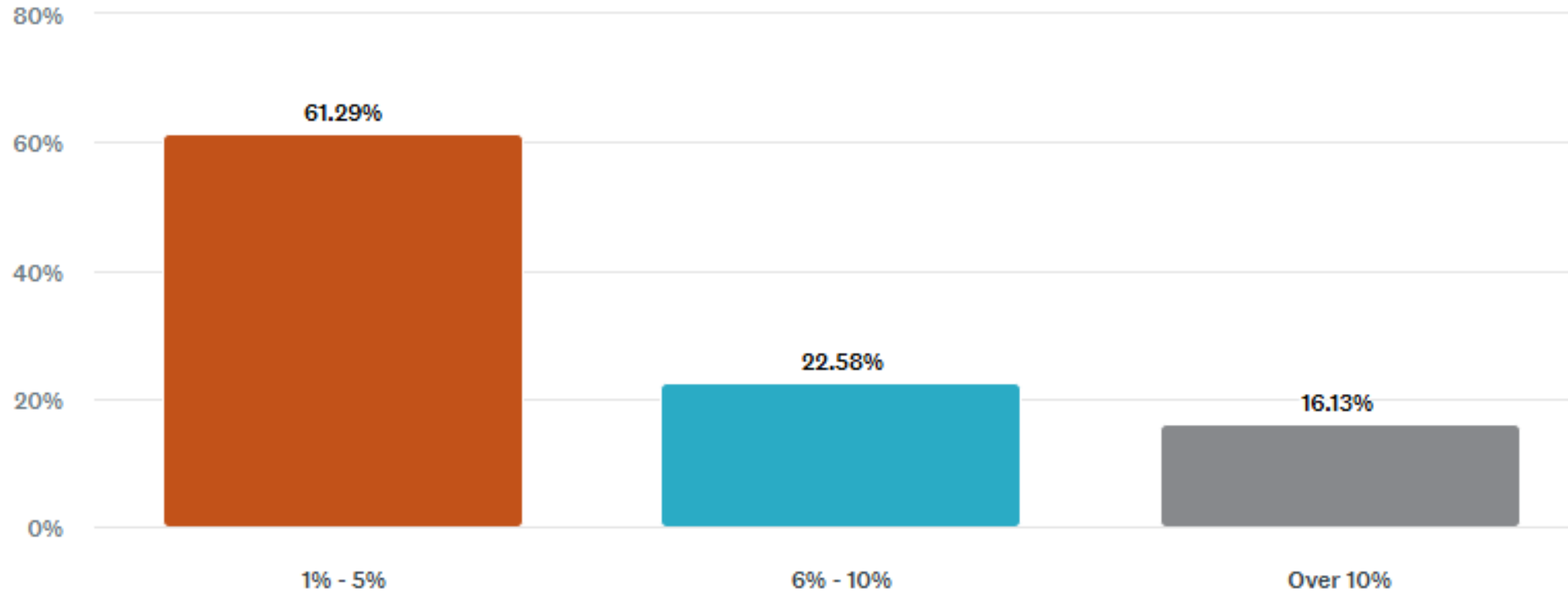
# Manufacturers: From 1 April 2026, how many price increases do you anticipate your business will introduce in the remainder of the year?



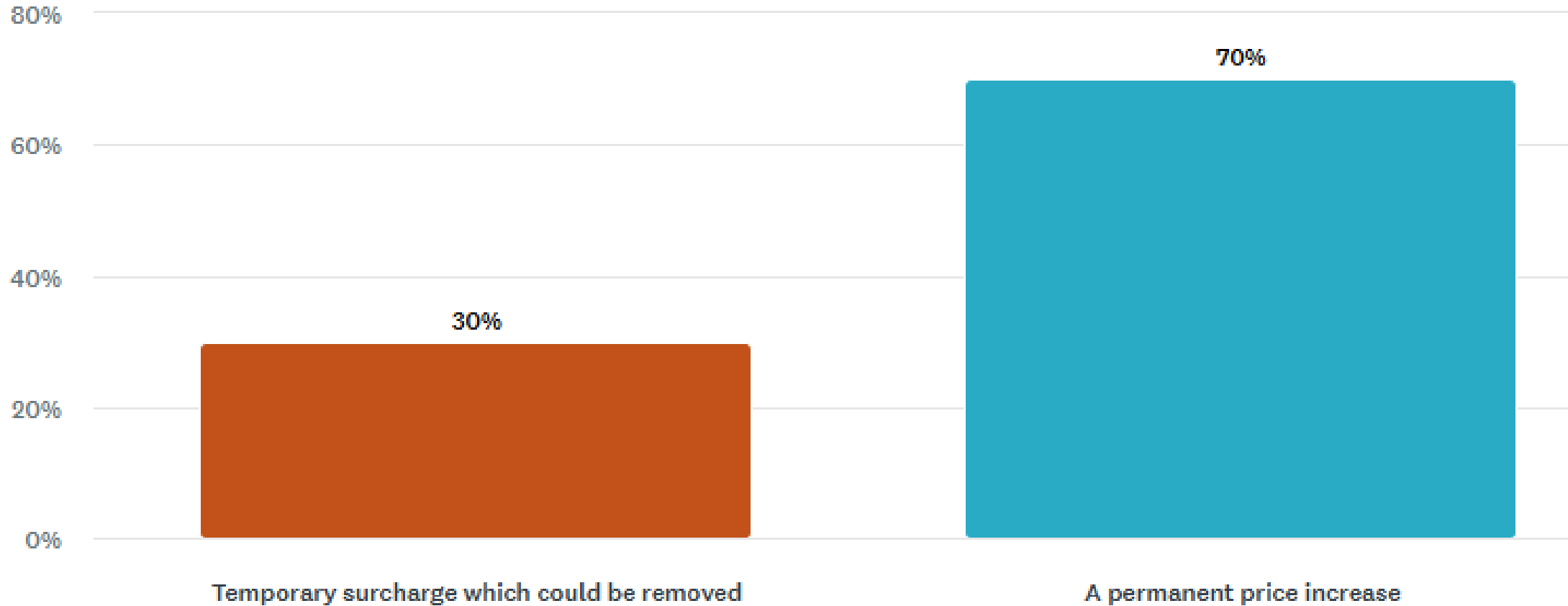
## Those choosing "Other" said:

- Will depend on the developing situation
- One in November if we can wait
- very fluid
- Unclear yet. Depends on many factors including competitors / market.
- The reality is we do not know. We are planning for a July 1st increase and are monitoring costs to decide what this increase should be. The question below is range dependent.
- This is a global economic and geopolitical issue, it is evolving and as it does, this will impact costs and market conditions. So price increase assumptions cannot be made and will be reactive based its impact on global supply, demand and energy availability.
- It is very difficult to comment due to the volatility of the market
- Multiple

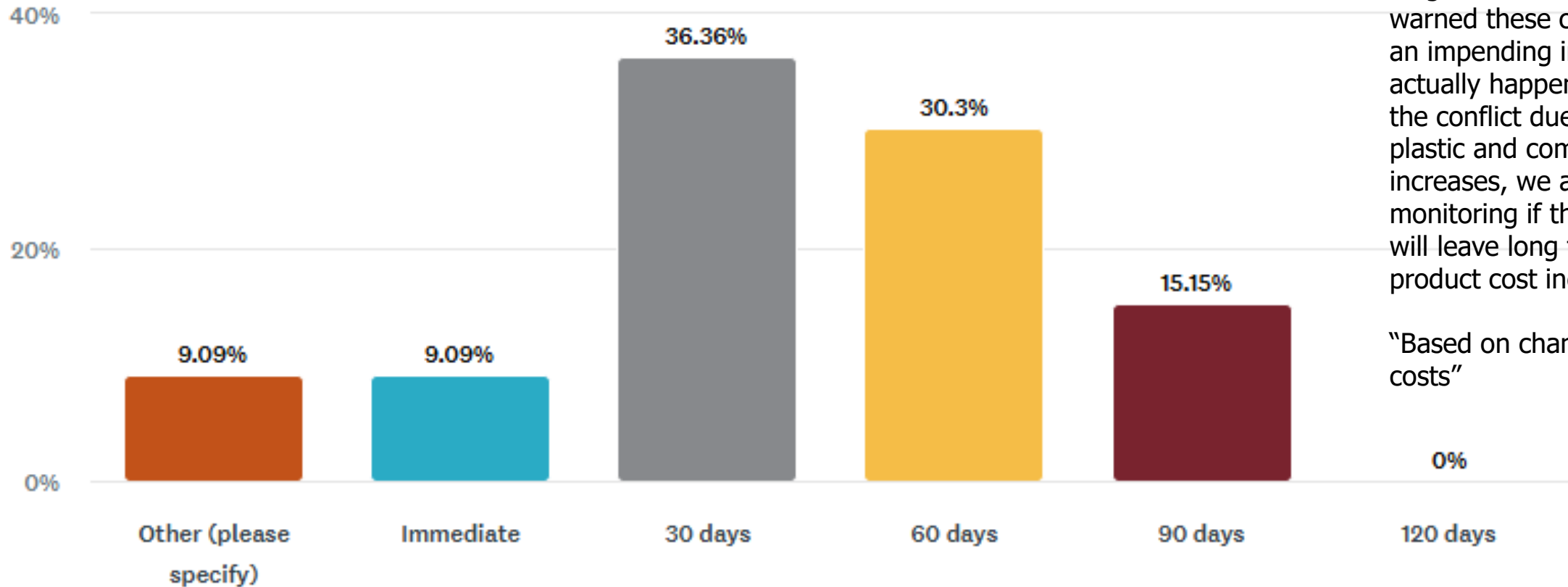
**Manufacturers:** What level of price increase do you anticipate implementing for your products in the next cycle?



# Manufacturers: Will the increase be a temporary surcharge which could be removed, or a permanent price increase?



# Manufacturers: What notice period will you give on price changes?



"Some customers require longer notice. We have warned these customers of an impending increase, this actually happened prior to the conflict due to copper, plastic and component cost increases, we are now monitoring if the conflict will leave long term product cost increases."

"Based on changes in stock costs"

## Wholesalers: As the Middle East crisis unfolds, where do you see the biggest risk for your business?

### Increased Costs / Rising Prices

- Price increases (multiple responses)
- Prices slowing down business
- Rising costs impact confidence and reduce sales and profits
- Higher price, decreased demand
- Decline in demand due to higher prices
- Price increase, raw material shortages
- Fuel cost & delayed delivery times transport costs
- Fuel costs/energy costs (multiple responses)
- Fuel costs increasing transportation costs...lead times, fuel availability, increase in costs
- Cost of living
- Indirect cost increases
- Price increases to operational costs
- Increase in min wage from April
- Rapidly rising overheads
- The oil price increase will lead to increased prices on plastic...
- Increased prices, steel shortages
- Shipping delays, price rises

### Supply Chain / Availability / Shortages

- Pricing and remaining competitive...
- Potential difficulties in stock availability
- Slowing of supply chain
- Availability & Price Increases
- impact on cash flow
- Price inflation, stock shortages Availability
- Main areas are consistency of product availability
- Shortages
- Supply chain availability and price increases
- Supply from China
- Price and Product availability
- Stock Availability Transport Costs

# Wholesalers: As the Middle East crisis unfolds, where do you see the biggest risk for your business?

## Lead Times / Delays / Logistics

- Extended lead times due to panic buying / delays in shipping
- Delay receiving goods
- Supply lead times and pricing volatility
- Delayed deliveries
- Fuel cost & delayed delivery times
- Indirect cost increases and stock lead times

## Demand Reduction / Project Slowdown

- Projects being put on hold
- Project cancellations...
- Reduction in demand for all sectors

## Cash Flow / Payment Issues

- Availability & price increases, impact on cash flow
- longer payment time from customers
- Slow payment from contractors

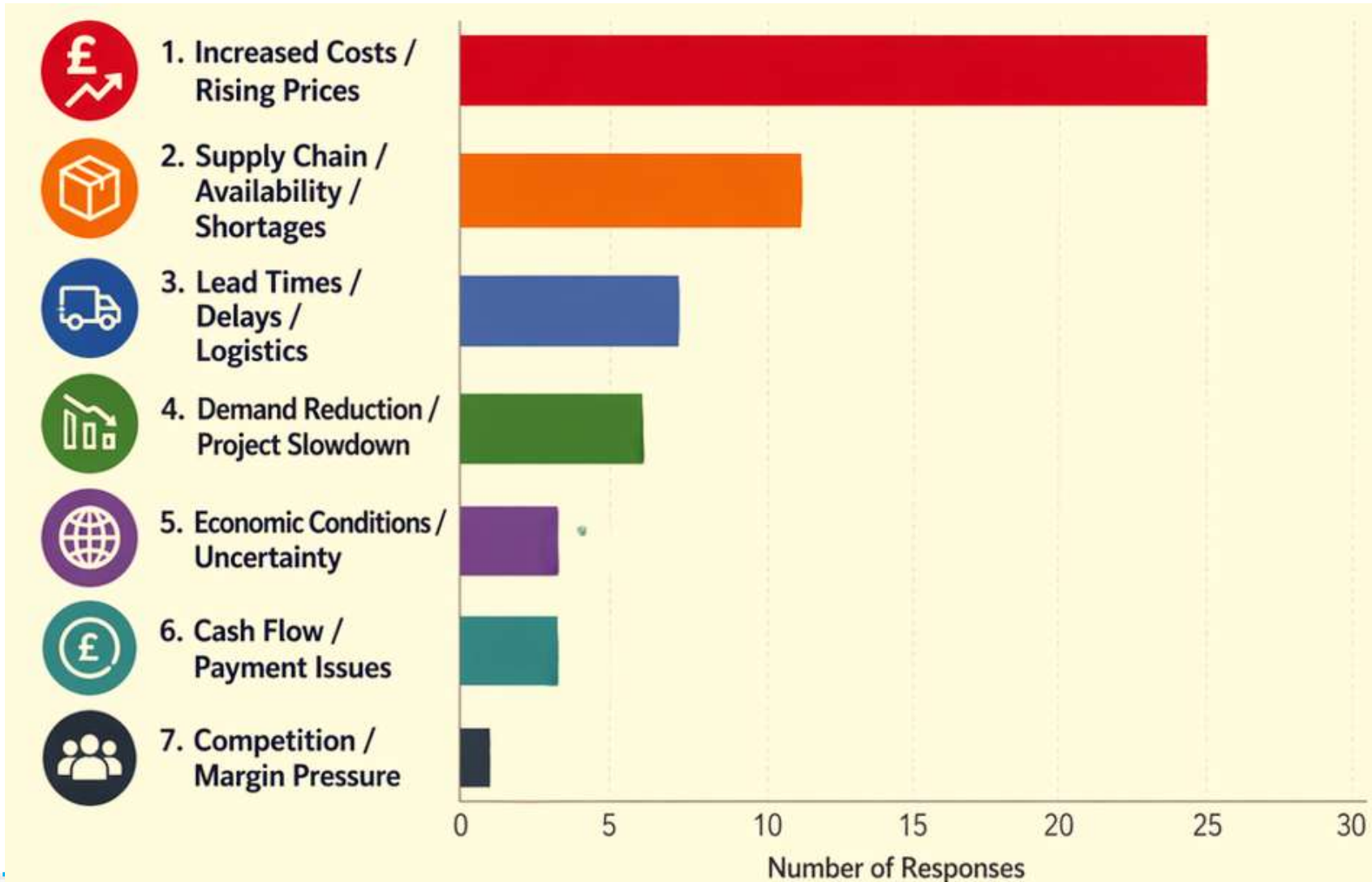
## Economic Conditions / Uncertainty

- Economic slowdown , market uncertainty
- UK recession
- Project cancellations... risk of company's liquidating...

## Competition / Margin Pressure

- Pricing and remaining competitive with larger entities such as Screwfix whilst retaining a margin...

# Wholesalers: As the Middle East crisis unfolds, where do you see the biggest risk for your business?



# **Manufacturers:** As the Middle East crisis unfolds, where do you see the biggest risk for your business?

## **Rising Costs & Pricing Pressure**

- Cost of product / goods
- Cost of materials
- Ongoing price increases
- Increased material, manufacturing, and distribution costs as well as slower production causing bottle neck delays to distribution.
- Materials Cost & Availability
- Price rises
- Cost of energy, transport costs
- Manufacturing and shipping costs as well as market uncertainty
- Increasing costs of transportation and raw material
- Rising costs & margin pressures
- Oil prices and raw materials
- Inflation and costs increasing, quickly

## **Supply Chain & Availability Issues**

- Supply of product
- Extended delivery - having to increase UK stock holding
- Shipping. We have secured the products at pre conflict prices so we just need to get it to the UK
- Continuity of supply in the medium long term at a cost/price that the market will accept
- Supply of key materials
- Raw material deliveries
- Fuel Prices and Freight disruption plus Currency.
- continued rising costs along with delay in RM
- Raw material supply disruption and volatile pricing

**Manufacturers:** As the Middle East crisis unfolds, where do you see the biggest risk for your business?

## **Market Demand & Customer Behaviour**

- Lack of public confidence
- Consumer confidence = less spending on RMI and potential interest rate disruption.
- Demand decrease amid inflation and uncertainty
- Production increases outstripping what the market is prepared to pay for our goods leading to customers finding cheaper alternatives (which may be of a lower quality).
- Confidence
- Market inertia, inflation = Loss of business investment and confidence spending power

## **Economic Conditions**

- Impact on economy
- Further negativity for growth in the UK market

# Manufacturers: As the Middle East crisis unfolds... how will this impact your wholesaler customers?

## Price Increases & Cost Pressures

- Rising costs & margin pressures
- Prices will increase / Potential price increases (multiple responses)
- Some of the increases will need to be passed on
- No further planned increases at this time but this is monitored on weekly basis due to rising material costs.
- Will have to accept price increases and pass them on to their customer base - distributors might hold higher stocks in anticipation of further price increases and possible issues
- Costs will have to be passed on but we are building increased stock to hopefully negate availability issues.
- Will mean price increase but if they pass on will result in a positive impact on revenues.
- Supply will continue, Pricing will be come more of an issue, especially with long term projects
- Increase in prices, greater scrutiny of relationships that are adding value

## Stock Availability & Supply Chain Issues

- Erratic supply of goods and price uncertainty
- Stocking of product
- Possible stock shortages waiting for stock to arrive
- Due to the recent economic state we have seen a general reduction in stock held at wholesalers.
- Reluctant to commit to stocking

## Demand & Business Activity Decline

- Contractor demand and bad deb risk
- Less contract and domestic business
- Less business
- No enquiries

## Project Delays and Lead times

- Increased lead times on projects

# Wholesalers: As the Middle East crisis unfolds... how will this impact your contractor customers?

## Loyalty / Shopping Around

- When prices rise contractors shop around
- Struggling to get increases over to builders/end clients. Shopping around more.
- They might go elsewhere who has stock
- They will shop around

## Pricing / Cash flow

- Lack of understanding affects their pricing
- Price increase, pressure to keep to costs previously quoted and cash flow issues
- Price increases / Price (multiple responses)
- Price increases will be passed on
- Increased cost & possible reduced availability
- Cash flow, jobs being postponed, cost issues

## Demand Reduction / Project Slowdown

- Slow down of work due to increase in borrowing money.
- Cash flow, jobs being postponed, cost issues
- Less business
- Fewer projects, investment delay.
- Fear in the market makes customers wary
- Delivery dates not being fulfilled, completion of projects being overdue and overbudget
- Expected fall in activity levels

## Struggling businesses

- Lack of work, staff being laid off
- Increased costs
- Negatively / Won't help, but everyone will be struggling
- If they are carrying out works, on a price, they could make losses and this would impact our collections and ultimately our payments to suppliers. Any businesses already under stress could fail.
- Hard to say, depends on their level of planning

## Deliveries to contractors

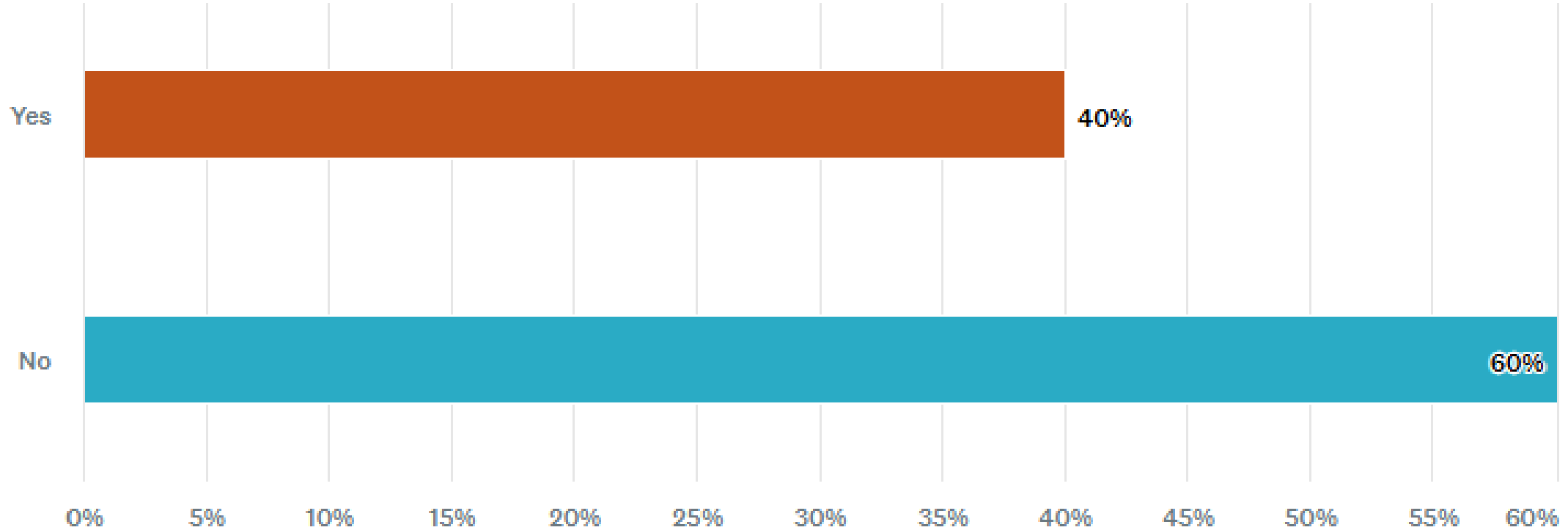
- Possibly fewer deliveries
- More site deliveries

## **Wholesalers:** How will this impact your contractor customers?

### **Miscellaneous**

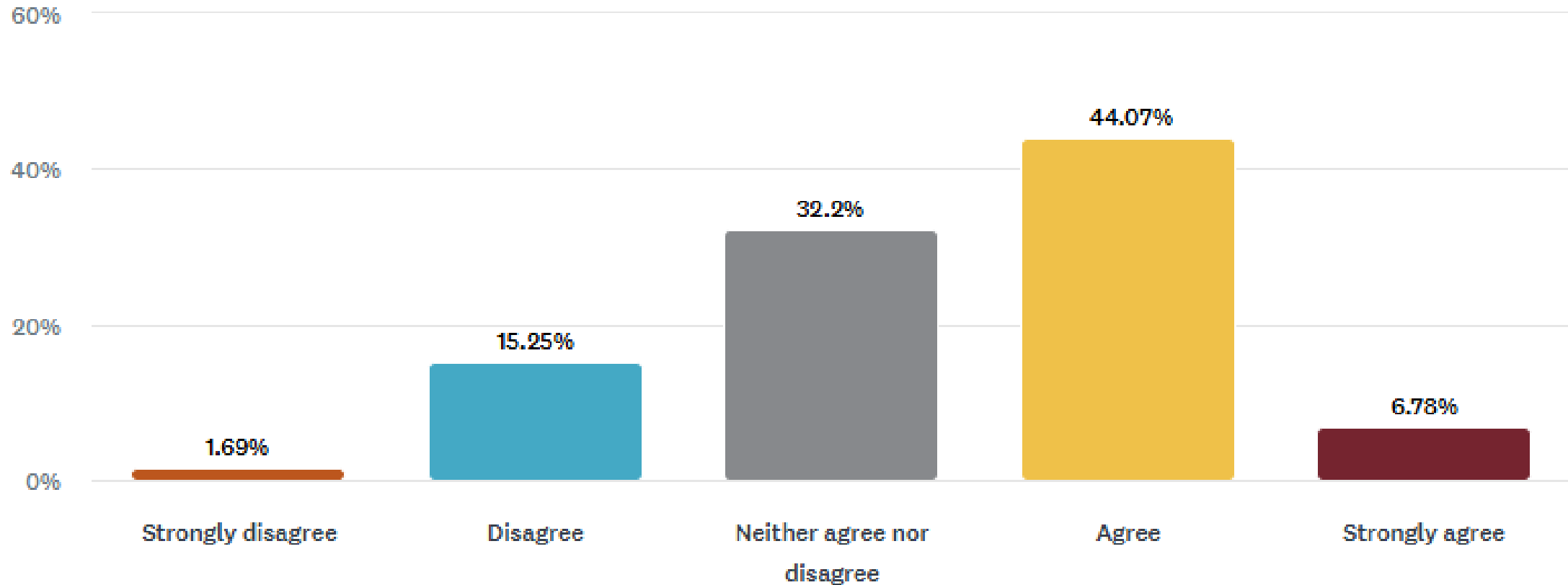
- Hopefully with our management it won't affect them
- Still unknown but we will have to work with them to supply products to suit their requirements that are available.
- As ever the wholesaler will bear the brunt as manufacturers increase the cost but contractors don't want any increases.

**Manufacturers:** Since the Middle East crisis began, are you receiving more enquiries from your **wholesaler customers** regarding **product supply and cost**?



**Wholesalers:** To what extent do you agree with this statement?

***"My manufacturer suppliers are keeping me well informed about current or potential impacts on product supply and costs"***



"Manufacturers need to communicate with the wholesalers as soon as a potential issue arises. If we don't know the details it makes forward planning very difficult."

# Wholesalers: What do you see as the **wholesalers' role** in helping your **manufacturer suppliers** plan demand better?

## Not wholesaler role

- I do not see the wholesaler having a significant role in this.
- None (**multiple responses**)
- We can tell them about upcoming projects, but they should be coming to see us to discuss their own demand concerns.
- Demand has not increased greatly so the suppliers should be in a good position to manage expectations.

## Manufacturer led

- Happily will respond to any information requested
- Difficult question as demand will move around all suppliers now based on there stock and pricing situation
- The large jobs, the Manufacturer should be leading this information

## Collaborators

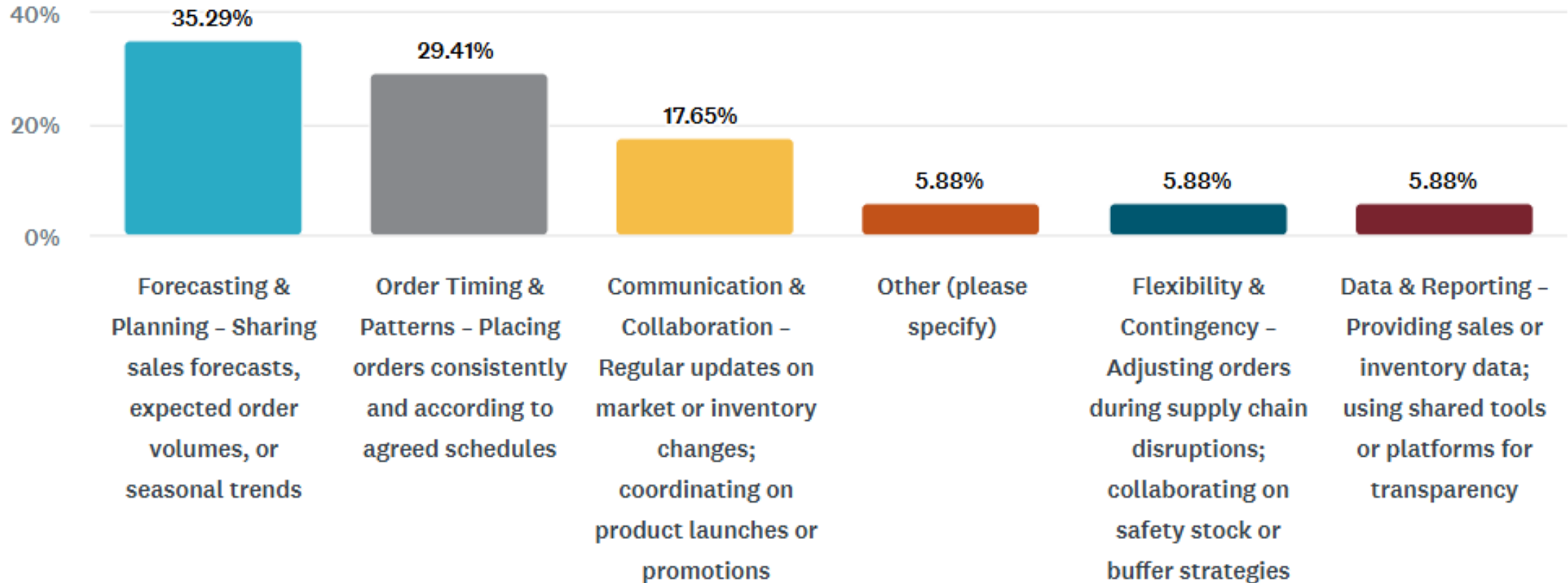
- We need to work more closely with suppliers to plan stock requirements over the short - medium term whilst the crisis goes on
- Keep them informed of contractor requirements and up our stocks
- Advice on upcoming projects / Advising on specific issues
- Accept price increases and work with them
- Clear communication
- Keep them informed with feedback from our customers
- To be effective communicators and realistic expectation management.
- We try to give as much notice as possible
- Forward ordering so key suppliers have guaranteed orders in place and not bulk buying for immediate delivery as others attempt to stockpile and control the market
- Providing forward orders where possible (**multiple responses re forward ordering, call off**)
- Forward order schedule, on time payments
- Place stock orders, advise of demand
- Keeping good stock levels

**Wholesalers:** What do you see as the wholesalers' role in helping your manufacturer suppliers plan demand better?

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“We are seeing moves by many suppliers to review costs over the next few months. As it stands, we are not experiencing significant product shortages. In the main the communication I have received on lead times and stock levels from suppliers is that it is currently not a major issue but it could be in the near future.”

**Manufacturers:** What actions, if any, could your wholesaler customers take to help you plan demand more effectively? Please select all that apply.



**“All of them”**

**Manufacturers:** What actions, if any, could your wholesaler customers take to help you plan demand more effectively? Please select all that apply.

“Wholesalers advising their customers to plan/order in advance as last minute orders are more likely to be the ones that will be harder to fulfil. Plan - Communicate – Collaborate”

“Without seeming critical, with a few exceptions our customer base seems very reactive to contractor orders not general stock (this is a general statement there are exceptions).”

# **Manufacturers:** Given the fluid situation, what additional steps are **you taking** to manage expectations within your **wholesaler customer base?**

## **Customer Communication & Transparency**

- Reminding them of our current availability and service, plus the fact we have not increased our price as yet
- We have notified of a potential increase, but are waiting to see if we have to implement. At the moment we are absorbing increased costs
- Regular dialogue with key partners / Better conversations
- Official letters, updates on our situation
- We are communicating through our extensive external sales team
- Where possible we are warning customers that prices will rise
- Soft Messaging
- Given this is global issue, one would hope they are well versed on the wider impact of the conflict, to both our industry but the wider global economic and political instability, threat and impact on global inflation.
- Keeping them informed
- Transparent conversations
- Regular dialogue, assurance of current manufactured stock levels with transparency in any factors changing the daily situation

## **Data & Monitoring**

- Regular data flows

## **Pricing Strategy & Cost Management**

- Minimising any increases applied at production

## **Supply Chain & Sourcing Adjustments**

- Sourcing from alternative locations
- Increase in supply
- Bought additional stock lines and secured better shipping services

## **Inventory & Stock Management**

- Just managing our stock levels
- Increasing stock levels

## **Order & Demand Management**

- Asking them to place call off orders
- Ensuring we can sustain the supply for our 'supporters' and whilst being more selective on one-off enquiries.

## **Product Strategy & Substitution**

- Offering to substitute better products where applicable

**Wholesalers:** How important is your **role in helping your contractor customers** navigate supply chain disruption?  
Where 1 is not at all important and 10 is extremely important.



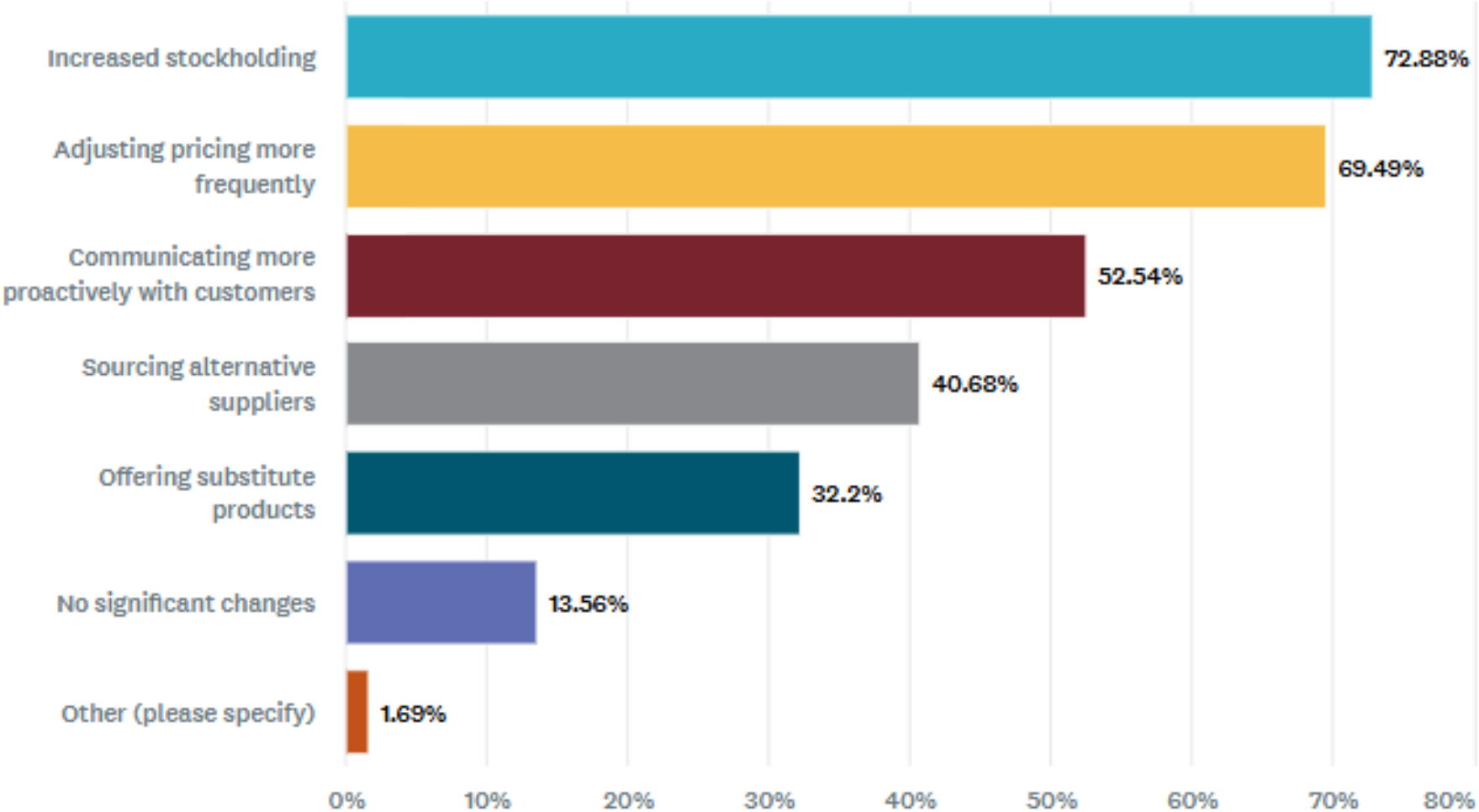
# **Wholesalers:** Given the fluid situation, what additional steps are **you taking** to manage expectations within your **contractor customer** base?

- **Being transparent and passing on as much information as possible.**
- Being as transparent as possible with delays and price increases.
- All we can do is advise them on rising costs and lead times. We are also increasing our stock levels.
- **Over stocking / Holding more stock / Maintain good levels of inventory**
- **As in the Covid pandemic, we are increasing our stock holding to maintain continuity of supply to contractors**
- Purchasing additional stock before price inflation. Especially when it comes to PV products.
- Notifying them of upcoming increases. Sharing things like copper charts to show them the trends. Generally making sure they are aware of what's happening.
- Very mixed bag on real information and not just scaremongering. However more is coming though given there is no end in sight to the Middle East Problems
- **Greater communication with key accounts to assess demand moving forward.**
- We are just using our normal policy of being honest and working with them where needed.
- **Forward ordering with manufacturers.**
- Stock updates to what they purchase consistently
- we are informing contractors of the future price increases

**Wholesalers:** Given the fluid situation, what additional steps are **you taking** to manage expectations within your **contractor customer** base?

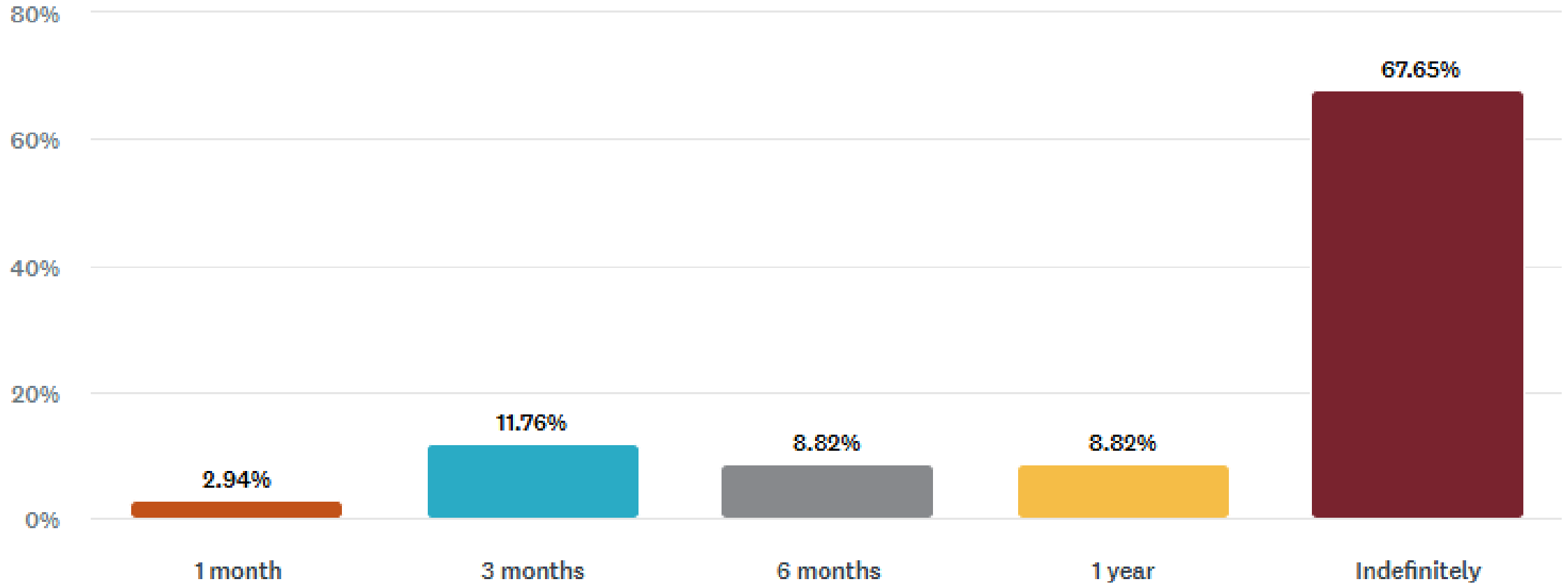
- Managing customer expectations on cost and delivery is a challenge. Our own transport costs are increasing, although it is difficult to pass that on.
- Pre-warned all customers of potential price increases, giving them an opportunity to stock up prior
- Communicating supplier price increases as they are notified.
- Monitoring delivery schedules to optimise routes.
- Keep them informed
- None so far. It is what it is!

# Wholesalers: What actions has your business taken in response to supply chain disruption?



“Nothing as yet, but this will change.”

**Manufacturers:** If the conflict were to continue to the end of 2026, how long would you be able to assure continuity of supply?



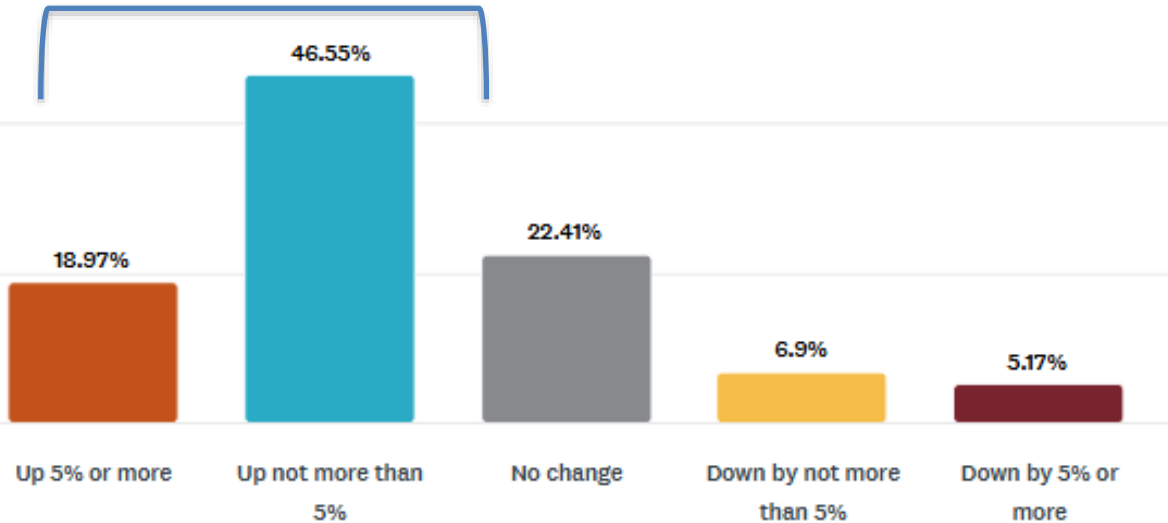
## Manufacturers: Comments on product supply.

- We have secured stock until Q1 2027
- Product manufacture is unlikely to be affected the logistical problem grows ie Getting to and around UK
- Generally supply unaffected, just pricing
- I don't see our product availability being cut to zero at all, though there might be some interruption to supply due to longer transit times.
- We currently hold around 5 months stock based on individual product forecast, with supply which is already in the water we could supply 6-8 months if production stopped immediately (this comment is a based on current forecasts).
- The majority of our product is from Mainland Europe
- Depends on the war and shortages that may occur for components over this period
- Unknown

# How do you anticipate sales volumes (like for like sales) will change... **during Q2 2026**

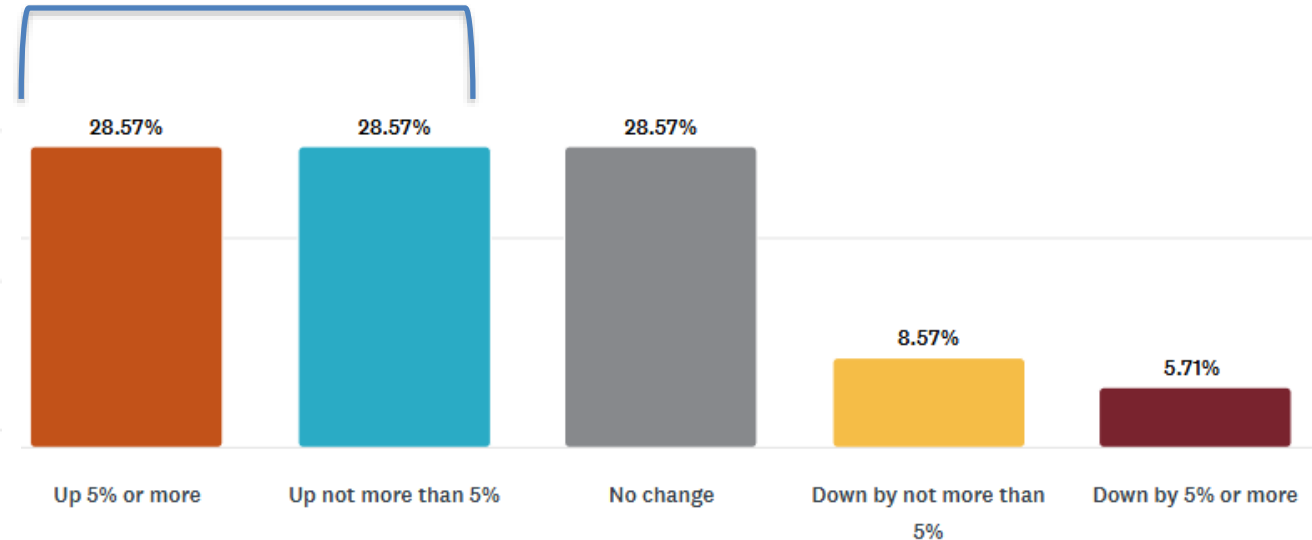
## Wholesalers

66% predict sales volume increase



## Manufacturers

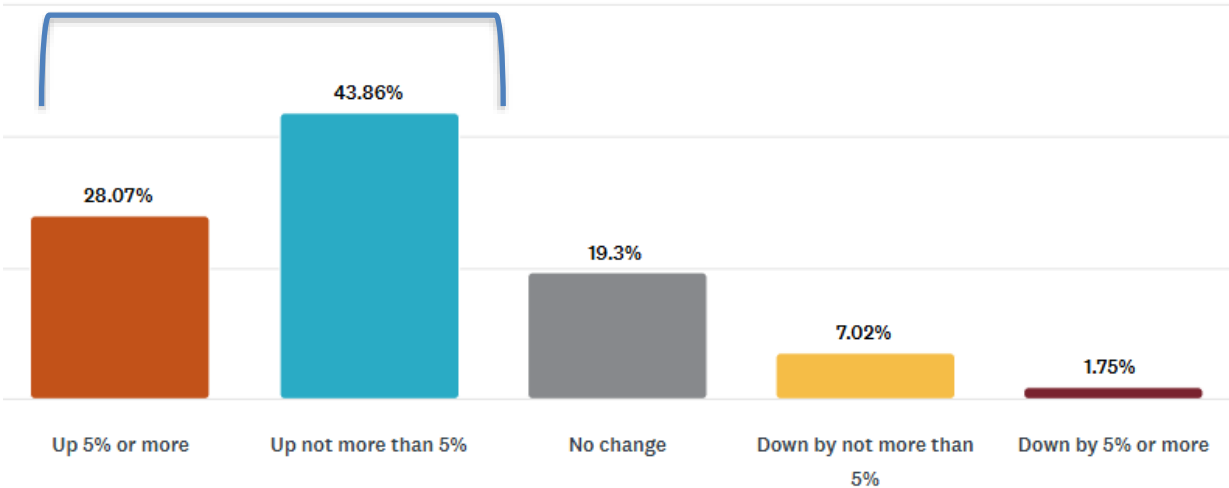
57% predict sales volume increase



# How do you anticipate sales volumes (like for like sales) will change... **during 2026**

## Wholesalers

72% predict sales volume increase



## Manufacturers

74% predict sales volume increase

