



May 2019

DIY Retailing - Spain

“Specialists that survive and thrive in DIY are going to be the ones who most effectively combine the benefits of having a physical store estate (click and collect, product displays, demonstrations and advice etc) with a sophisticated online operation to match the range, availability and speed of fulfilment that the ...

DIY Retailing - Germany

“The DIY specialists have been losing share of DIY spending. Since 2013 the equivalent of all of the sales of Praktiker (which failed in 2013) have been lost by the specialists and as the decline is continuing there must be concerns that further rationalisation will be necessary.”

– Richard ...

DIY Retailing - Europe

“The general story around Europe is that the DIY specialists are under pressure. Levels of home ownership are falling and people are less able or less willing to undertake major projects. So their general DIY needs are often served by non-specialists, from hypermarkets to non-food discounters. We think that the ...

April 2019

Footwear Retailing - Spain

“Specialist footwear retailers need to reclaim the territory that they have ceded, whether to non-specialists or online-only retailers, by focusing on their expertise, customer service levels and the quality of their products. To get back in the game with trainers/sneakers, some operators could benefit from acquisitions to gain a ...

Footwear Retailing - Germany

“For the majority of the retail sector the underlying dynamic is the challenge from online retailers. But the footwear specialists have suffered less than most and appear to be fighting back effectively. But that overall

DIY Retailing - Italy

“DIY retailing in Italy remains highly fragmented, with most distribution still passing through small- and medium-sized retailers. But larger-scale retailing is growing and the sector is consolidating slowly as foreign retailers, mainly from France, are expanding. The largest chain is ADEO’s Leroy Merlin, but even this only generates 12% of ...

DIY Retailing - France

“DIY retailing in France is relatively robust, although market leader Leroy Merlin dominates and sets the bar high for its rivals. Its closest rival is Kingfisher-owned Castorama, which is half the size and in something of a crisis. Consumer shopping behaviour is changing and retailers need to evolve to meet ...

Footwear Retailing - Italy

“Italians spend the most per head on footwear of consumers in the big four European markets covered in this report series, making it an attractive and potentially lucrative market for footwear retailers. But growth in spending has slowed in recent years as consumer confidence has declined due to the country’s ...

Footwear Retailing - France

“Footwear retailing in France is changing as non-specialists, such as sports, fashion and online-only retailers, are capturing more spending. The middle market and those retailers stuck on the high street or in shopping centres are being squeezed as consumers’



view is driven by the success of Deichmann and we think that many of the ...

shopping preferences are changing. Selling shoes online can be challenging, but ...

Footwear Retailing - Europe

“Demand for footwear has grown almost everywhere in the last five years, but unlike in so many other retail sectors, the footwear specialists, and certainly the larger multiples, have been able to broadly maintain their share of sales. Many of them have expanded their own online propositions, expanded their store ...