



## May 2018

### DIY Retailing - France

“French DIY is a tough market for specialists at the moment. Competition has intensified as consumers have become more accustomed to buying online and non-specialists, such as electricals retailers and grocers, have increased their share of spending using marketplaces to expand their offer from third parties. Market leader, Leroy Merlin ...

### DIY Retailing - Spain

“After a prolonged and painful recession, the DIY sector is showing signs of a strong recovery. Both the spending and specialist retailers’ sales figures are moving the right way. Even house prices have started to recover. This should be the right environment for the DIY retailers to expand again, though ...

### DIY Retailing - Europe

“There has been a marked contrast in recent strategy between the two leaders in European DIY. On the one hand there is an approach typified by ADEO (whose main business is Leroy Merlin) with a very customer-focussed, service-led strategy. On the other we have seen a cost-led strategy at Kingfisher ...

### DIY Retailing - Italy

“Italy’s DIY specialist retailers saw sales expand for a fourth consecutive year in 2017, albeit with very low growth, buoyed by a brief improvement in the housing market. However, house prices have since begun slipping back and the market remains depressed. The number of consumers planning to spend on home ...

### DIY Retailing - Germany

“However one looks at the DIY sector in Germany, it is hard to paint a rosy picture. It is under pressure as all the main macro-economic and demographic factors are moving against it. We do not forecast a sudden collapse, just a long slow decline. The opportunities in the sector ...

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### Department Stores - Italy

“The department store sector in Italy saw weak growth in 2017 as both Coin and Rinascente are losing share of spending to specialist retailers. Both department stores need to broaden their appeal to attract less affluent and younger consumers. While the Italian online market is still underdeveloped, as e-commerce grows in ...

### Department Stores - France

“The French department stores are heavily reliant on their Parisian flagship stores and on tourists. As a result they were hit hard by the downturn in foreign visitors that followed the terrorist attacks in Paris (November 2015) and Nice (June 2016). The format is much less important to retailing than ...

### Department Stores - Europe

### Department Stores - Spain

“As the only department store in Spain, El Corte Inglés is facing growing competition from more agile and lower-priced specialist retailers. In order to compete El Corte Inglés needs to broaden its appeal and move away from a reliance on older and wealthier customers. It also needs to stand out ...

### Department Stores - Germany

“There are signs of the beginnings of a recovery in the German department stores sector. New ownership and a more focussed management now shorn of too many diversifications are a good start. The consumer research for this report shows that the stores are still valued for many of the things ...



## European Retail Intelligence - Continental Europe



“There is enormous variation between countries in the development of department stores. At one extreme there is Spain, where the only department stores is the country’s leading non-food retailer. At the other extreme there are countries like Austria, where the sector scarcely exists. Italy has a couple of high profile ...