

## Electrical Goods Retailing - Europe - February 2017

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“The days when the electricals sector was seen as a boom area are long gone. White goods and most brown goods are now bought mostly on a replacement basis – there is too little product innovation to accelerate the process. Where there is development, as with curved TV screens or 3DTV it is of minority interest only.”

– **Richard Perks, Director of Retail Research**

This report looks at the following areas:

Electricals retailers are pinning their hopes on the connected home, but the scale of demand for such products remains to be seen. Amazon is growing fast as are other online pureplayers. Currys may be fighting back, and Fnac – Darty is poised to do so as well, but smaller independents are struggling and so the voluntary groups that support them are as well

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Argos remains most popular but Currys PC World is catching up fast

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Figure 306: Dixons Carphone: store portfolio, 2015-16

Figure 307: Dixons Carphone: planned store closures, 2016/17

Retail offering

## E-Square

What it does

Company background

Key figures

Members

Figure 308: E-Square membership, 2016

Sales

## ElectronicPartner

What we think

Structural weaknesses

Where next?

Company background

Company performance

Figure 309: Electronic Partner: Group sales performance, 2012-16

Retail offering

## Euronics International

What we think

Bringing its members new and innovative products

Brand communication

Bolstering multi-channel proposition

Services add value to physical stores

Company background

Company performance

Figure 310: Euronics International: group sales performance, 2011-15

Figure 311: Euronics International: estimated outlet data, 2011-15

Retail offering

## Expert Europe

What we think

National network, local availability

Strength in common branding is being eroded

Increased focus on brand and product expertise and service...

...and online presence

Where now?

Company background

Company performance

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Figure 312: Expert Europe: group sales performance, 2012-16

Figure 313: Expert Europe: outlet data, 2012-16

Retail offering

### Fnac Darty Group

What we think

Enlarged product offering to better compete with the likes of Amazon

Enhanced multichannel offering

Increased bargaining power to offer more competitive prices

Shortcuts to aid electrical product consumers decision-making process

Company background

Company performance

Figure 314: Fnac Darty: financial performance, pro forma, Q3 2016 and 1st nine months 2016

Figure 315: Fnac Darty: store network, pro forma, 2015-16

Retail offering

### HTM Group

What we think

Pushing ahead with geographical expansion

Increasing buying power

Tapping into the potential of the connected home and connected commerce

Company background

Company performance

Figure 316: HTM Group: estimated sales, 2012-16

Figure 317: HTM Group: outlet data, 2012-16

Retail offering

### Maplin Electronics

What we think

Strengthening multichannel proposition with new returns solution

Price reductions to bolster value-for-money positioning

New store format filled with new shopping experiences

Company background

Company performance

Figure 318: Maplin Electronics Ltd: group financial performance, 2011-2015/16

Figure 319: Maplin Electronics Ltd: outlet data, 2011-2015/16

Retail offering

### Media-Saturn

What we think

Looking for opportunities in rentals

The important of the connected home

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### Services potential

Digital stores

Being proactive with innovation

Redcoon brought pureplay online expertise

Where now?

Company background

Company performance

Figure 320: Media Markt/Saturn: group financial performance, 2011/12-2015/16

Figure 321: Media Markt/Saturn: outlet data, 2011/12-2015/16

Retail offering

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