



DIY Retailing - Europe - 2022

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This report looks at the following areas:

- The impact of COVID-19 on the DIY retailing sector and how it is recovering from this
- The impact of rising living costs on European consumers and how this is affecting the DIY retailing sector
- The winners and losers in the DIY retailing sector as we emerge into the post-COVID recovery phase
- How people shop for DIY and which retailers they use
- Changes to consumer attitudes and priorities as a result of the pandemic
- Interest in a variety of DIY related services and innovations among DIY shoppers

Overall, DIY has been one of the more resilient retail sectors during the pandemic. In 2021, the sales of DIY specialist retailers continued to increase recording 3.9% growth across the five leading economies of Europe (the UK, France, Germany, Italy and Spain). As consumers started projects that they planned during lockdown, sector sales in 2021 were over €3.3 billion larger than in 2020. The outlook for 2022 and beyond is uncertain due to the geopolitical situation in Europe, the level of inflation affecting households and the still fragile normalisation of the health situation. The ongoing conflict in Ukraine, coming in the wake of a pandemic which was tough for many DIY retailers, looks set to inflict further pain by putting severe pressure on household finances, which had already been coming under pressure from energy price hikes. However, we expect the sector to remain resilient, albeit not at the growth levels seen in the last two years.

In addition to the cost-of-living crisis and consumers' concerns around high inflation, the biggest threat to the DIY retailing market is non-specialist retailers encroaching on specialists' traditional territory, including generalist online-only retailers like Amazon. Mintel consumer research confirms that Amazon is now an important player in the big five markets in terms of penetration. The popularity of buying DIY goods online continues to increase across Europe, turbocharged



"The DIY markets across the leading European countries vary a great deal, due in part to differences in home ownership levels. DIY has been one of the more resilient retail sectors during the pandemic. In 2021, specialists' sales continued to increase, recording 3.9% growth across the five leading economies of Europe."

– **Utku Tansel, European Retail Analyst**

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by the COVID-19 pandemic. In the UK, Germany and Italy, the online giant is the top retailer for online purchases while in both France and Spain it is the second most popular choice by consumers purchasing DIY goods online.

There are good opportunities for retailers to take a stronger position on DIY goods aimed at beginners, rapid delivery options, second-hand or refurbished items as well as flexible payment options with consumers wanting to see more action in these areas. In addition, maximising in-store experiential retailing, faster delivery as well as personalised expert advice can create a point of differentiation.

Our research for this report also shows that 41% of respondents in Spain, 34% in Italy, 30% in the UK, 29% in Germany, and 21% in France would like to see DIY goods aimed at beginners when it comes to innovations across Europe. Specialist DIY goods retailers could look at creating areas in-store and online dedicated to beginners where customers can quickly and easily choose products.

Furthermore, thanks to the pandemic there is now significant confidence among many European consumers to embark on DIY and home improvement tasks, whether that is upcycling items, doing home improvements or repairs. This has led to some attitude shifts when purchasing DIY goods. As such, some 41% - 58% of European consumers across the five countries say that they now would be more confident in doing home improvements themselves (eg putting up shelves, painting walls) than they were before the outbreak. This is likely to be driven by both a desire to save money but also may be more sustainable by recycling/reusing existing items rather than buying new. This opens up real opportunities for DIY retailers. They can play a role in helping self-sufficiency – through shared expertise and lessons. With this they can help generate pride, self-worth and reward, not just relief or practicality, making DIY pleasurable in its own right, rather than just hard work.

This report series covers the DIY market in five large Western European countries – the UK, France, Germany, Italy and Spain.

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- **'IKEA Decoration' launched in Paris**
- **French specialist Bricoman trials a two-shops-in-one concept in Paris**
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