

DIY Retailing – France – 2022

Report Price: £1095 | \$1495 | €1295

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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 French 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

We are seeing new demographics enjoying home improvement projects and confidence is growing. In our consumer research 49% of French DIY shoppers said they are more confident in doing home improvements themselves and 48% in repairing a product now than compared to before the COVID-19 outbreak.

The cost-of-living squeeze is going to have a disproportionate effect on less affluent DIY customers. Many are likely to postpone house moves and larger home improvement projects or abandon them completely until the crisis passes. However, wealthier people and homeowners are DIY retailers' core customers and many of these will notice the squeeze less. Rising costs of raw materials are making contractors' prices go up, so some may decide to take on projects that they otherwise would have outsourced in order to avoid uncertainty on prices.

Some of the biggest opportunities for DIY retailers lie in "do-it-with-me". The pandemic has brought a new audience to DIY, and many are enthusiastic but unskilled. Retailers need to build relationships with these new customers, and developing knowledge and skills is one way to do this. This will become a key differentiator as consumers begin to expect retailers to not just sell them materials and tools but also teach them how to use them.



"The French DIY market has seen two exceptional years of growth and is well placed to capitalise on the ongoing focus amongst consumers on their home environment. Although we expect the cost of living crisis to hold back growth in 2022, there are many opportunities for retailers that are prepared to innovate and think outside the box."

– **Natalie Macmillan, Senior European Retail Analyst, June 2022**

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

DIY Retailing - France - 2022

Report Price: £1095 | \$1495 | €1295

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

There are also opportunities in sustainability and conscious consumption. Consumers are increasingly making these considerations part of their purchasing decision and retailers need to be able to help them make the right choices. Rising energy prices are likely to result in increased interest in renewables and products and services that can help cut the costs of running a home.



What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- **Key issues covered in this Report**
- **Market context**
- **Areas covered in this Report**

Figure 1: Coicop classifications used for the Mintel market size

EXECUTIVE SUMMARY

- **The five-year outlook for DIY Retailing**

Figure 2: DIY Retailing outlook, 2022-27

- **The market**
- **DIY spending reached €31.5 billion in 2021**

Figure 3: France: DIY products – the Mintel market size (including VAT), 2016-21

- **A buoyant housing market and state support for energy-efficiency**
- **But the cost of living could hold back growth in 2022**
- **DIY retailers have thrived over the last two years**

Figure 4: France: DIY specialists, sales (excluding VAT), 2016-23

- **The consumer**

Figure 5: France: engagement in DIY shopping, by monthly income bracket and housing tenure, 2022

- **Online shopping for DIY has strengthened**

Figure 6: France: demographics of online DIY shoppers, 2021 and 2022

- **Leroy Merlin has a clear lead**

Figure 7: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, 2022

- **Confidence in DIY has increased**

Figure 8: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, 2022

- **Opportunities in "Do-It-With-Me"**
- **Second-hand could be a new revenue stream**
- **Security when hiring a professional**

Figure 9: France: interest in DIY/home improvement innovations/enhancements, 2022

- **Companies and brands**
- **Leroy Merlin dominates the retail sector**

Figure 10: France: Leading specialist DIY retailers: shares of all DIY specialists' sales, 2021

- **New store formats**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- The pandemic has boosted online shopping

ISSUES AND INSIGHTS

- How can DIY retailers help consumers through the cost of living crisis?
- Are DIY retailers lagging behind on sustainability?

MARKET SIZE AND PERFORMANCE

- DIY spending reached €31.5 billion in 2021

Figure 11: France: DIY products – the Mintel market size (including VAT), 2017–21

RETAIL SECTOR SIZE AND FORECAST

- DIY retailers have thrived over the last two years

Figure 12: France: DIY specialists, sales (excluding VAT), 2017–23

CHANNELS TO MARKET

MARKET DRIVERS

- Ukraine represents a shock to the French economy
- The government's shield on energy price rises

Figure 13: France: Key economic projections, % annual change, 2019–24

- Employment has been resilient
- Prices of DIY and building materials are rocketing

Figure 14: France: Consumer prices* of DIY-related categories, annual % change, 2017–21

Figure 15: France: Consumer price inflation (HICP*) of DIY-related categories, annual % change, 2020–22

- Consumer confidence has slipped from its recent high point

Figure 16: France: trends in levels of consumer confidence*, 2020–22

- People are increasingly worried about the cost of living

Figure 17: France: Consumer concerns about household finances, 2022

- The conflict in Ukraine will hurt French consumers

Figure 18: France: Expected impact of the Ukraine crisis on French Consumers, 2022

- The housing market – demand is driving higher prices
- State aid to promote energy efficient home improvement

THE CONSUMER

- Who buys DIY products
- Fewer people shopped for DIY in 2021

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

- **An opportunity to sell more to younger women**

Figure 19: France: engagement in DIY shopping, by gender and age, 2022

- **Homeowners and the more affluent shop most**

Figure 20: France: engagement in DIY shopping, by monthly income bracket and housing tenure, 2022

- **Dads are big spenders**

Figure 21: France: engagement in DIY shopping, by life stage and parental status, 2022

- **Online shopping for DIY has strengthened**

Figure 22: France: demographics of online DIY shoppers, 2021 and 2022

- **Specialists remain the most popular place to shop**

- **Leroy Merlin has a clear lead**

Figure 23: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, 2022

- **Trend data**

Figure 24: France: percentage of shoppers using leading specialist DIY retailers, 2018-22*

- **Amazon is behind Leroy Merlin online**

Figure 25: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, 2022

- **Hypermarkets and generalist online retailers most popular amongst women**

Figure 26: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, by gender, 2022

- **Leroy Merlin appeals to older shoppers...**

Figure 27: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, by age, 2022

- **....and the more affluent**

Figure 28: France: Retailers used to purchase DIY products in the last 12 months, in-store or online, by age, 2022

- **The impact of COVID-19 on DIY/home improvement behaviours and spending**

- **Consumers are increasingly confident in their DIY skills**

Figure 29: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, 2022

- **A shift in priorities could take spend away from DIY**

- **Interest in DIY/home improvement innovations/enhancements**

Figure 30: France: interest in DIY/home improvement innovations/enhancements, 2022

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **Help keen but inexperienced consumers to help themselves**

Figure 31: France: interest in DIY/home improvement innovations/enhancements, beginners' ranges, 2022

- **Second-hand could be a new revenue stream**

Figure 32: France: interest in DIY/home improvement innovations/enhancements, second hand, 2022

- **Potential for "do it with me"**

Figure 33: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, remote guidance, 2022

- **Security when hiring a professional**

Figure 34: France: agreement with statements about COVID-19/coronavirus outbreak and purchasing items for DIY/home improvements, network of tradesmen, 2022

COMPANIES AND BRANDS

- **Leading players**
- **Synergies between Leroy Merlin and Weldom sustain growth at Adeo**
- **Recovery continuing at Kingfisher**
- **Ambitions grow at Les Mousquetaires as it assimilates BricoPrivé**
- **Mr Bricolage benefiting from localism trend**

Figure 35: France: Leading specialist DIY retailers: sales, 2017-21

Figure 36: France: Leading specialist DIY retailers: outlet numbers, 2017-21

MARKET SHARES

Figure 37: France: Leading specialist DIY retailers: shares of all DIY retailers sales, 2017-21

ONLINE

- **Online activity**
- **Online sales of DIY**
- **Leading online players**

APPENDIX: DATA SOURCES, CONSUMER RESEARCH METHODOLOGY AND ABBREVIATIONS

- **Abbreviations**
- **Consumer research methodology**
- **Data sources**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.