

GLOBAL HOME IMPROVEMENT

Report



European DIY
Retail Association



Global Home
Improvement Network



2019

2014-2018 data

45 countries

5 continents

10 Major DIY Groups



FEDIYMA Members

AFEB - Spain & Portugal

BHETA - UK

FEBIN - Belgium

HHG - Germany

IVG - Germany

MADE4DIY -Italy

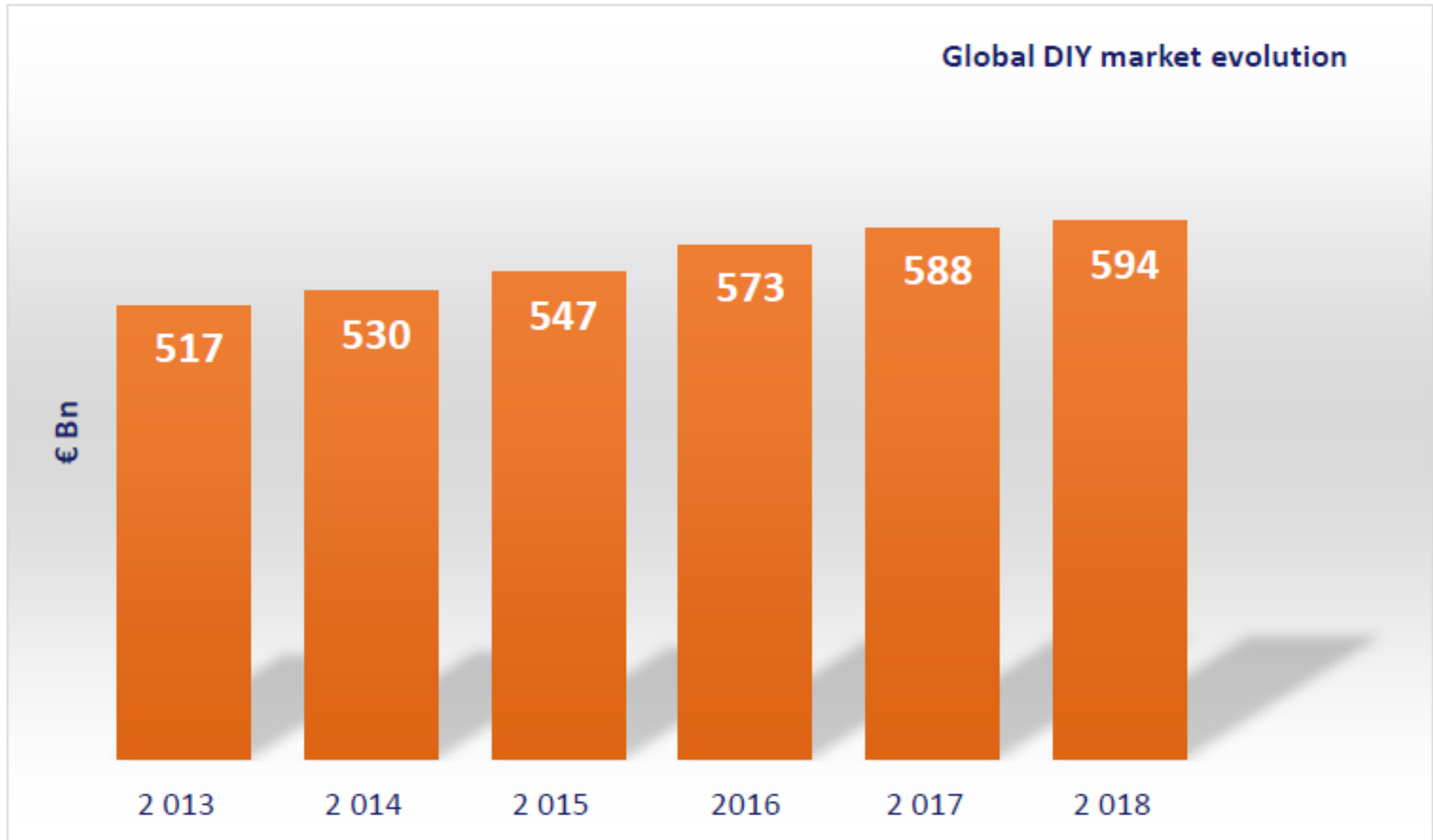
UNIBAL- France



FEDIYMA
850 members
89% European Market
45 countries
5 continents
10 Major DIY Groups



Global DIY market evolution



Compared growth rates: DIY/GDP

- GDP : Current international \$ / Source: IMF
- Global DIY Market: € / FEDIYMA estimate
- *2016 increase partly due to different sources for sales net estimations and to the add of four new country in the study.

Compared growth rates: DIY market and GDP

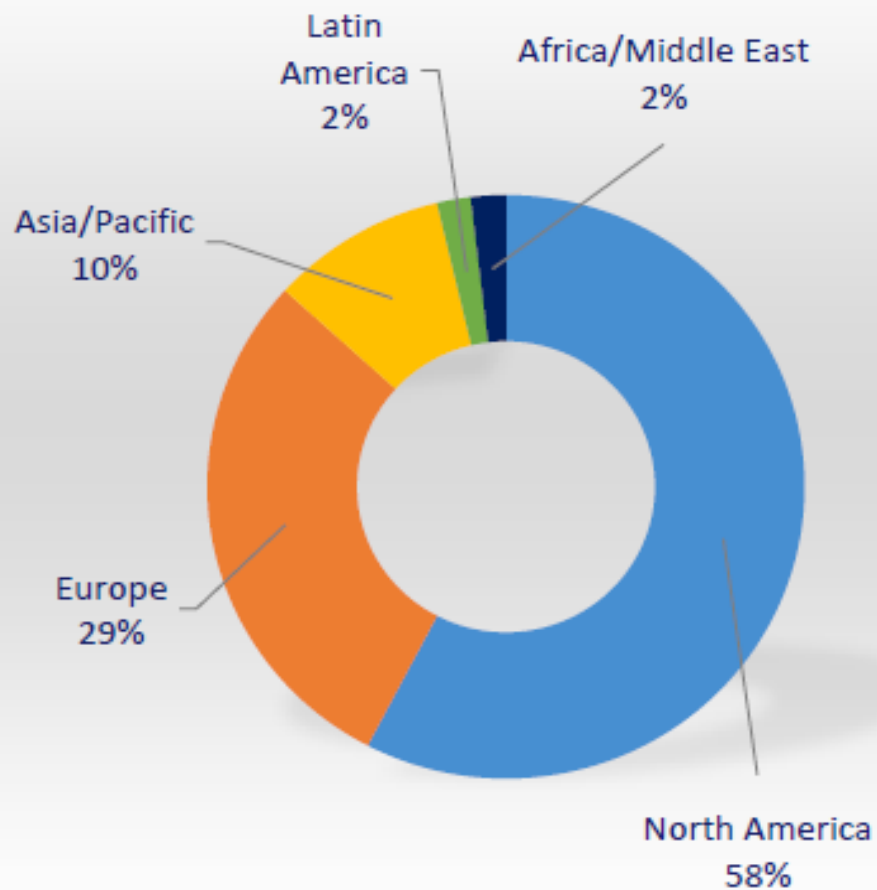


Market size by region – expenditure per cap

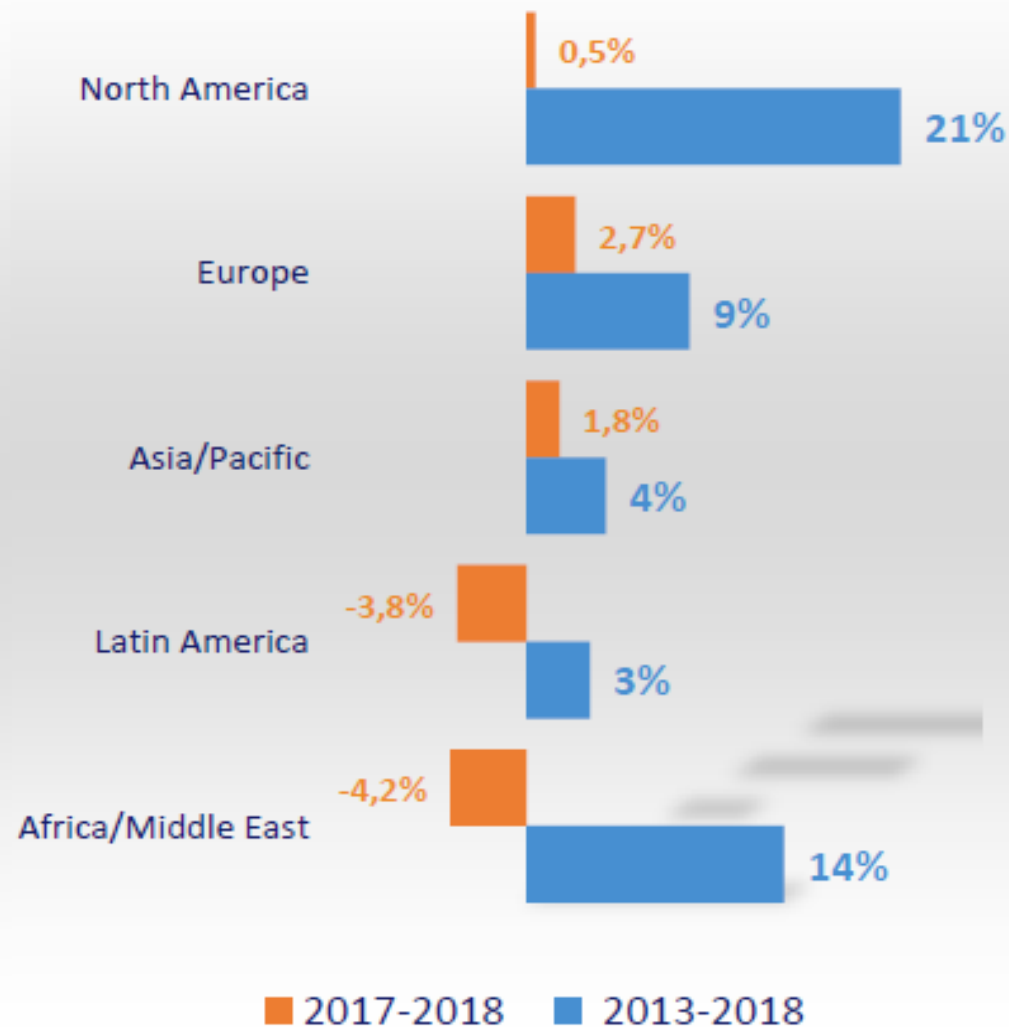


DIY market size by region

2018 DIY sales, €

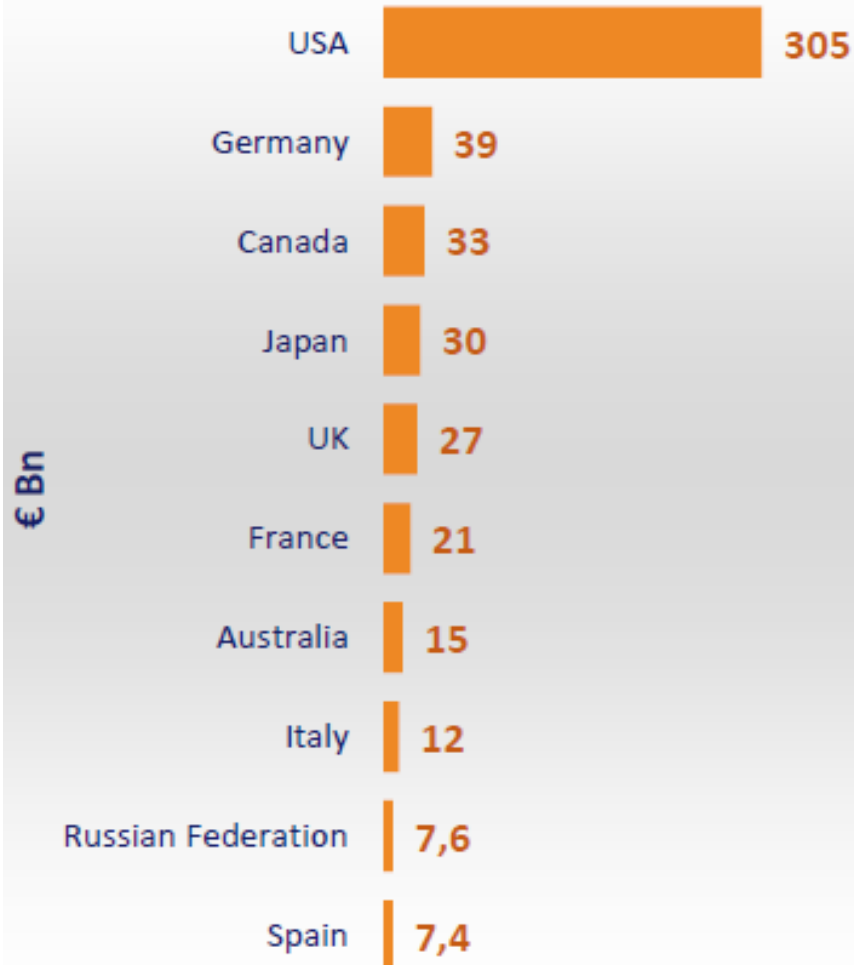


Market size evolution

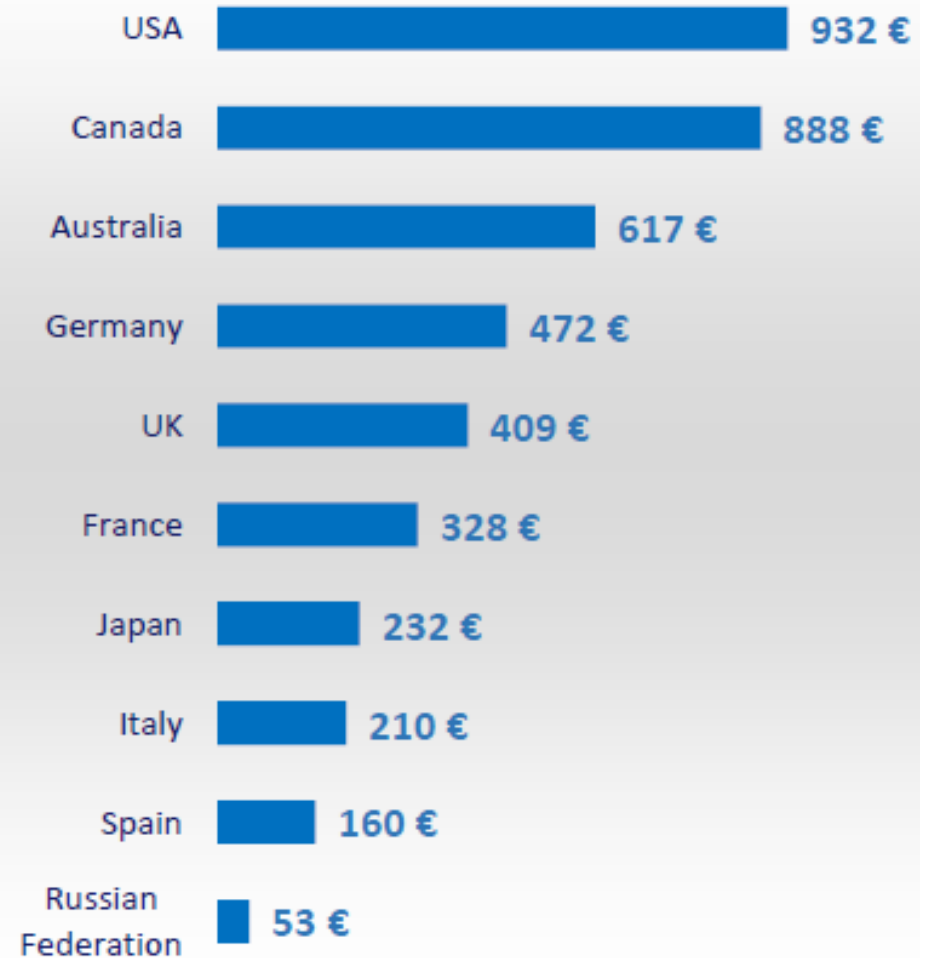


Top 10 markets DIY average expenditure by region

2018 main DIY market sizes, €Bn

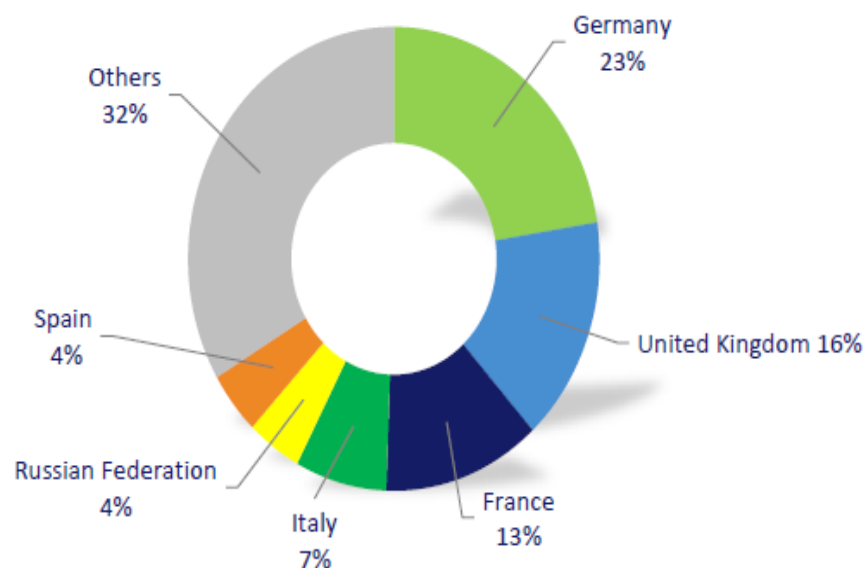


2018 average DIY expenditure per capita, €

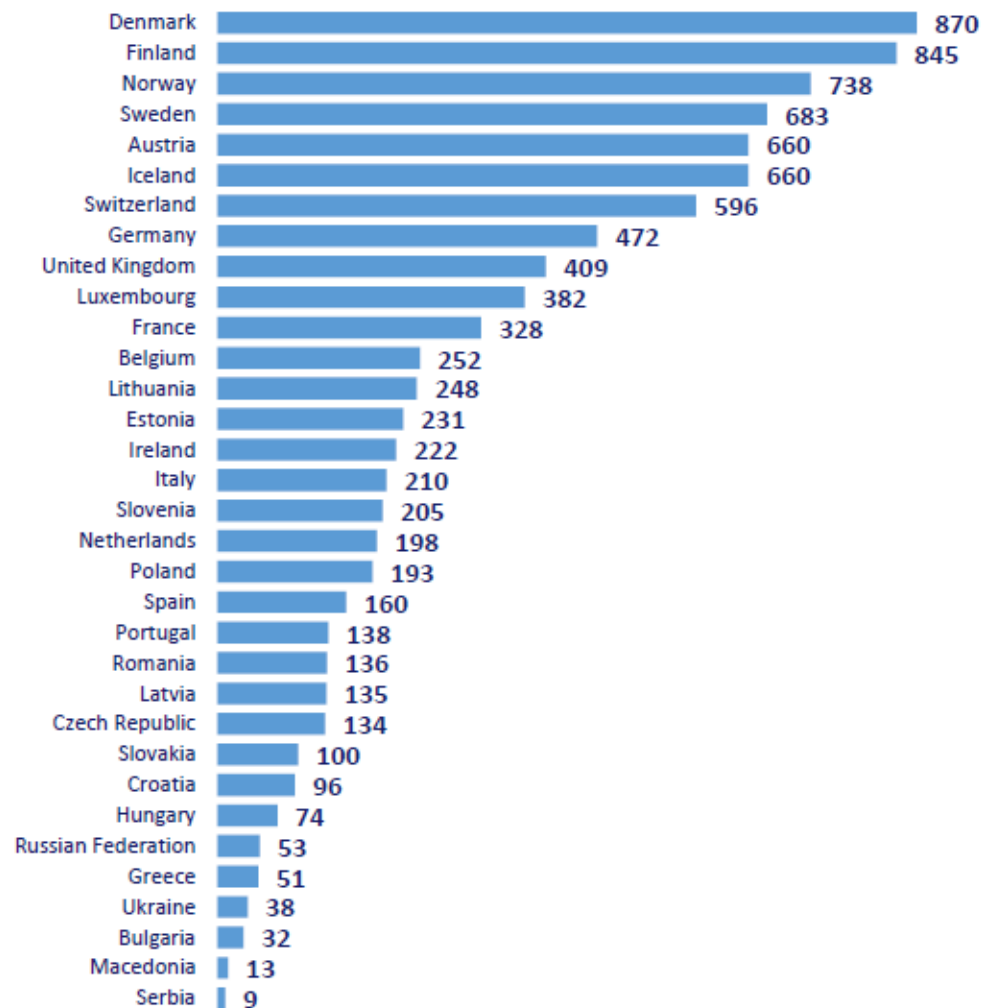


Focus on the European DIY markets

European DIY markets in 2



Europe : 2018 average DIY expenditure per capita, €



By country

Example : USA



#1

USA

305 €Bn

1

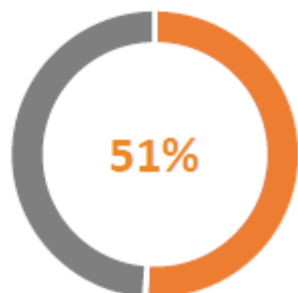
North America

USA

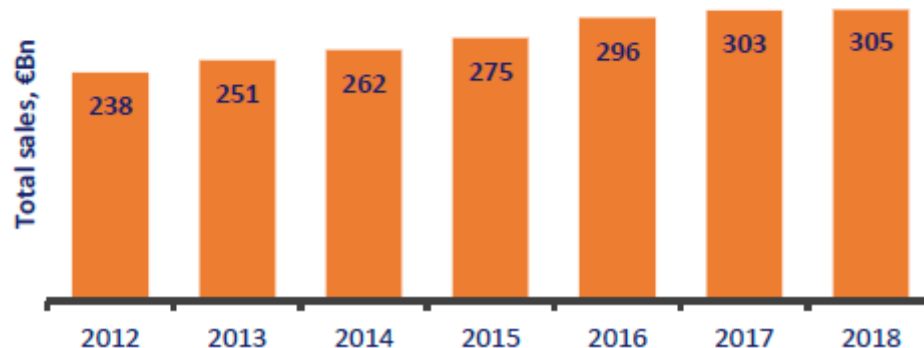
305 €Bn



% of worldwide DIY sales



DIY Market size evolution



+0,6%
Last year
(2017/2018)

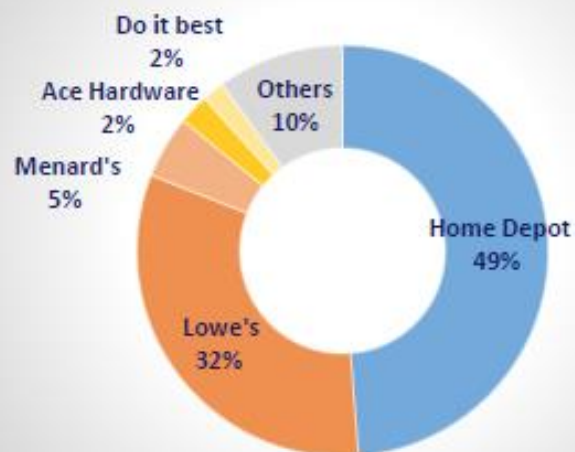
+21,4%
Last 5 years
(2013/2018)

#1

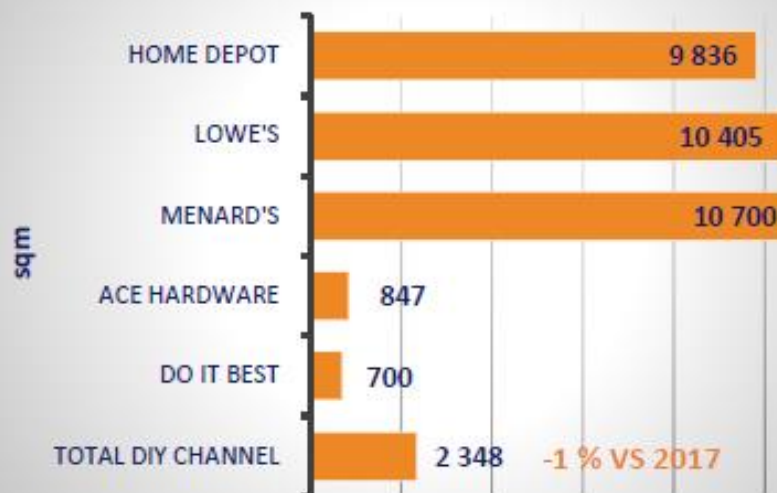
USA

305 €Bn

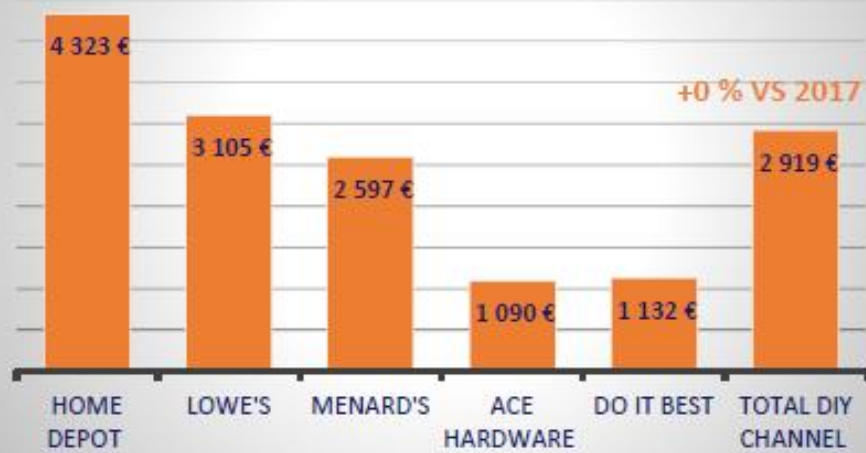
DIY Competitors M/S



Top 5 Average size of a store

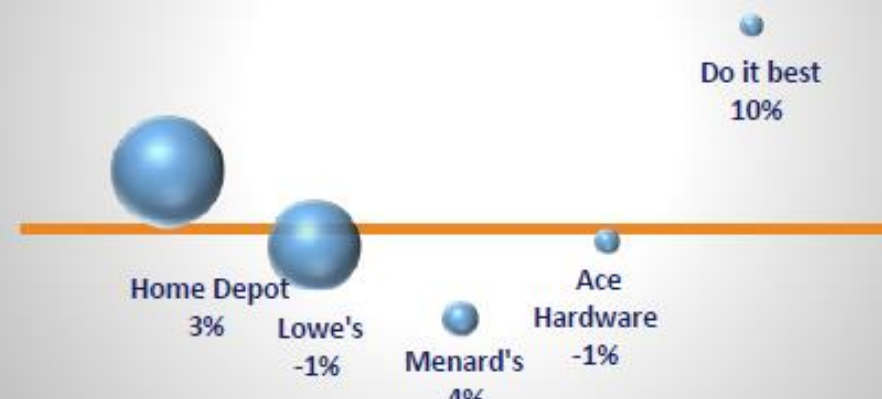


Top 5 Average T/O / sqm



Top 5 Year-on-year evolution

Bubble size: sales



#1

USA

305 €Bn

Detailed information

	USA	Europe	USA	World
Demographics				
Population (2018 - M)	327	743	327	7 633
Evolution 2005-2018 (last 13 years)	10%	2%	10%	17%
Economics				
GDP (PPP based) per capita (2018 - K€)	53 061	33 325	53 061	18 409
Current prices - exchange rate \$ VS € : 0,847541				
DIY market (2018 - €Bn)	305	173	305	594
DIY market evolution 2017-2018	0,6%	2,7%	0,6%	1,1%
DIY expenditure per capita (2018 - €)	932	233	932	78
Housing				
Urban population % (2018)	82%	72%	82%	61%
Home ownership % (2014)	63%	69%	63%	-
Human Development Index (HDI) - 2015	0,9	0,8	0,9	0,7

327
million
people

82%
live in
cities

63%
own
their
home

#1

USA

305 €Bn

Top 10 Competitors

Retailer	Owner	2017 Sales (€M)	2018 Sales (€M)	Ev.	M/S	Stores	sqm + 1,000	Av. sqm	TO/sqm (€)	Source
Home Depot	Home Depot	81 968	84 234	3%	49%	1 981	19 485	9 836	4 323	CI
Lowe's	Lowe's	56 177	55 672	-1%	32%	1 723	17 928	10 405	3 105	CI
Menard's	Menard's	8 870	8 475	-4%	5%	305	3 264	10 700	2 597	CI
Ace Hardware	Ace Hardware	4 159	4 133	-1%	2%	4 476	3 790	847	1 090	CI/OE
Do it best	Do it best Cooperative	2 736	3 010	10%	2%	3 800	2 660	700	1 132	DV
84 Lumber	84 Lumber	2 555	2 855	12%	2%	250	750	3 000	3 807	CI/OE
Harbor Freight Tools	Harbor Freight Tools	2 625	2 689	2%	2%	900	1 700	1 889	1 582	OE
Sears	Sears	3 570	2 503	-30%	1%	866	1 025	1 184	2 442	CI/DV
Sherwin-Williams	Sherwin-Williams	1 613	1 889	17%	1%	4 032	2 177	540	868	CI
True Value	True Value	1 823	1 824	0%	1%	4 400	2 420	550	754	DV/OE
Other chains		5 589	5 415	-3%	3%	2 471	3 969	1 606	1 364	
Total DIY channel		171 684	172 698	0,6%	100%	25 204	59 168	2 348	2 919	
Other channels		131 148	131 922	0,6%						
Total DIY market		302 832	304 620	0,6%						

By retail

Example : OBI

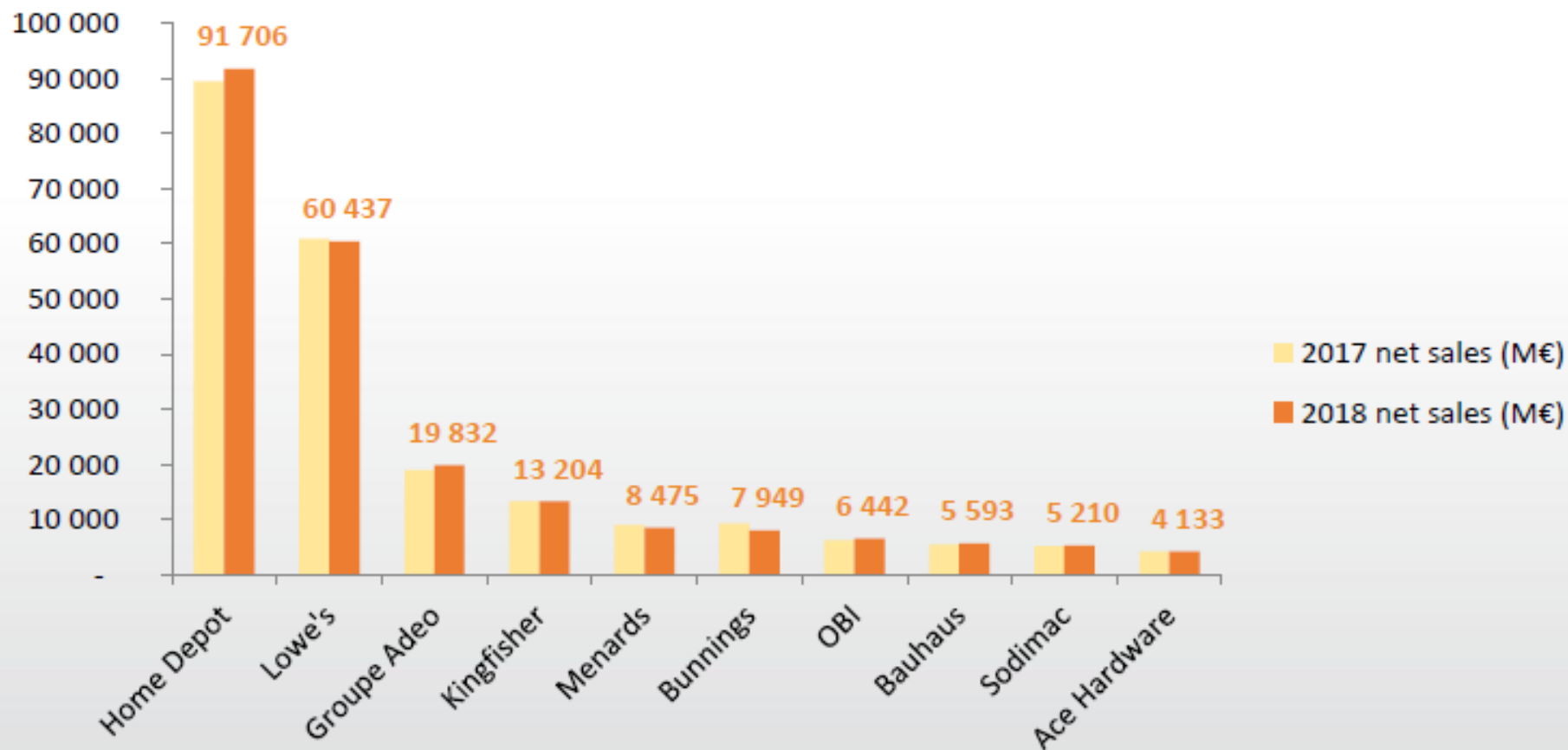


Top 10 DIY Groups worldwide



Top 10 retailers 17 vs 16

TOP 10 DIY Groups net sales 2018 vs 2017



#7

10% Worldwid DIY sales

OBI

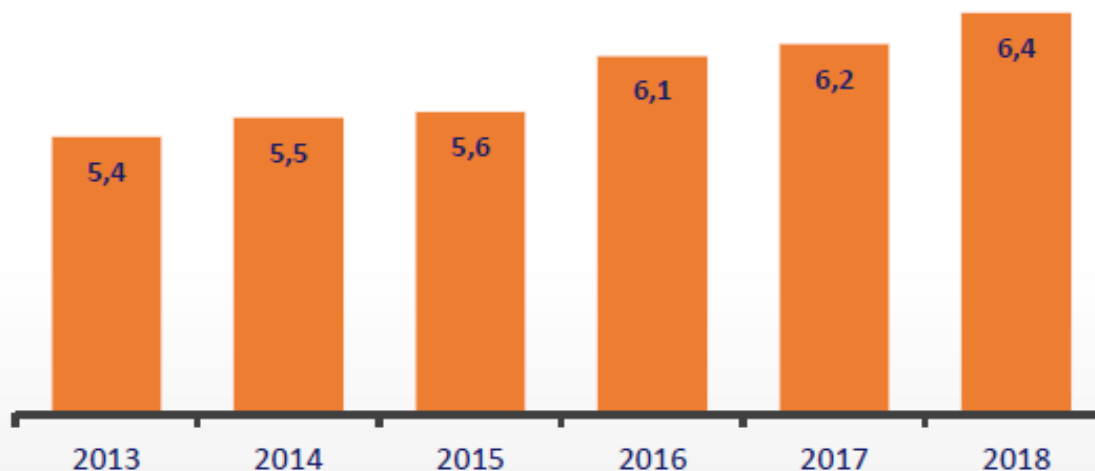
6,4 €Bn



OBI[®]

■ € Bn

T/O evolution



+ 4 %

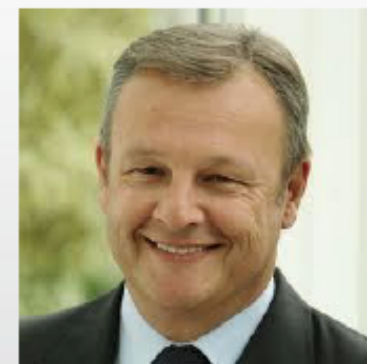
Last year
(2017/2018)

Base : €

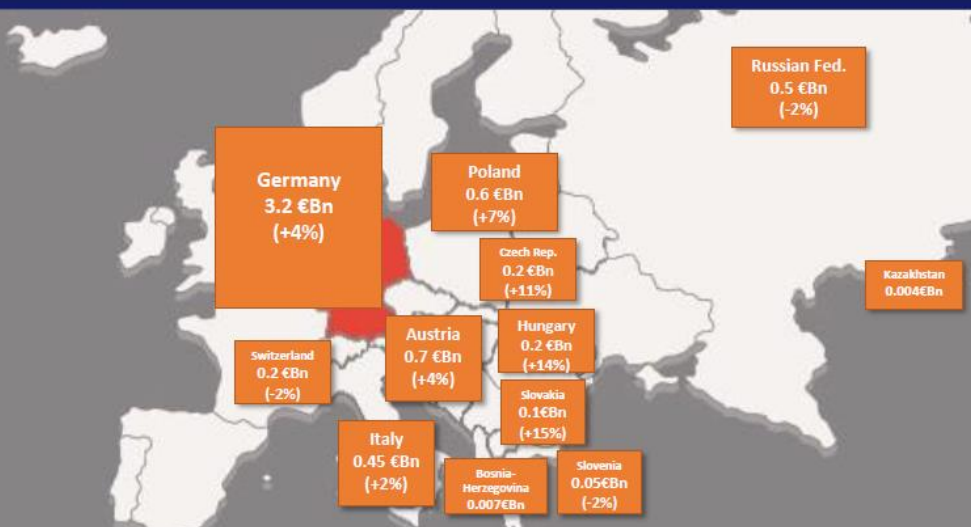
+ 20 %

Last 5 years
(2013/2018)

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Sergio GIROLDI
Chief Executive Officer



Operating countries and retail chains

Country	Retailer	2017 Sales (€M)	2018 Sales (€M)	Evolution	Stores	Sqm * 1,000	Av. sqm	TO/sqm (€)
Germany	OBI	3 129	3 261	4%	350	2 798	7 993	1 166
Austria	OBI	679	707	4%	80	526	6 581	1 344
Poland	OBI	558	594	7%	58	441	7 600	1 349
Russia	OBI	547	534	-2%	28	316	11 288	1 690
Italy	OBI	439	448	2%	56	257	4 582	1 746
Hungary	OBI	238	270	14%	29	198	6 823	1 367
Czech Republic	OBI	230	255	11%	33	216	6 543	1 181
Switzerland	OBI	187	184	-2%	11	77	7 032	2 378
Slovakia	OBI	110	126	15%	13	117	8 968	1 084
Slovenia	OBI	52	51	-2%	8	55	6 927	922
Bosnia and Herzegovina	OBI	7	7	-6%	1	4	4 308	1 532
Kazakhstan	OBI		4		1	10	10 380	360
Total		6 176	6 442	4%	668	5 015	7 508	1 285

Fiscal year ended 31/12/2018.

Global Home Improvement Report by Fediyma 2019

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