Global Home Improvement Report by HIMA 2020

2014-2019 data

53 countries

5 continents

10 Major DIY Groups

HIMA Members

AFEB - Spain & Portugal

BHETA - UK

FEBIN - Belgium

HHG - Germany

IVG - Germany

MADE4DIY -Italy

UNIBAL- France

HIMA

850 members

89% European Market

53 countries

5 continents

10 Major DIY Groups

Global DIY market evolution

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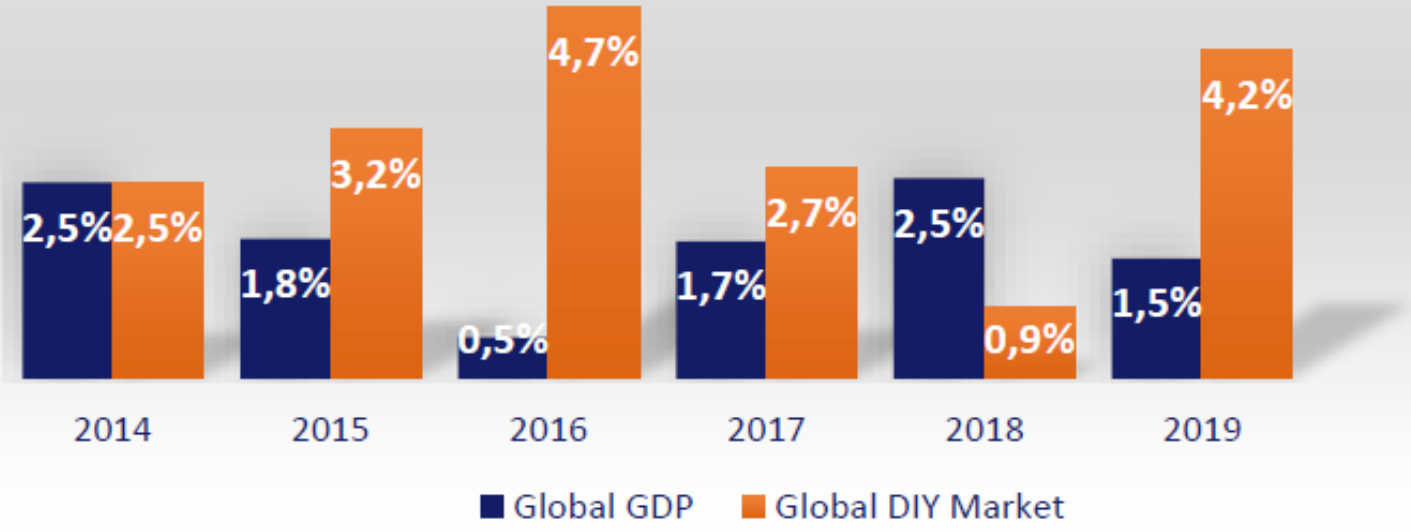
Compared growth rates: DIY/GDP

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

Compared growth rates: DIY market and GDP



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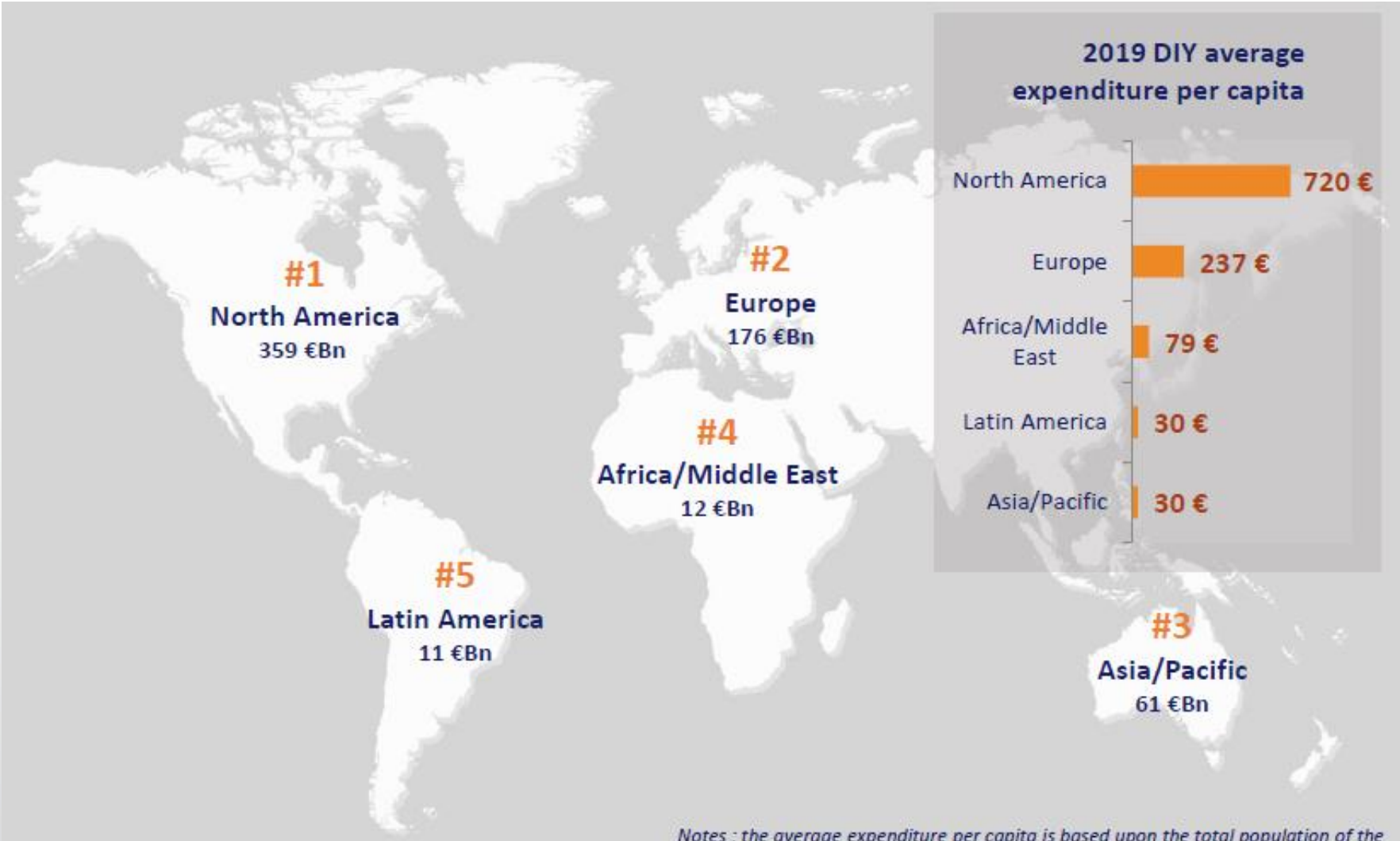
Market size by region – expenditure per cap



Notes : the average expenditure per capita is based upon the total population of the countries included in this report, not on the total population of the whole region.

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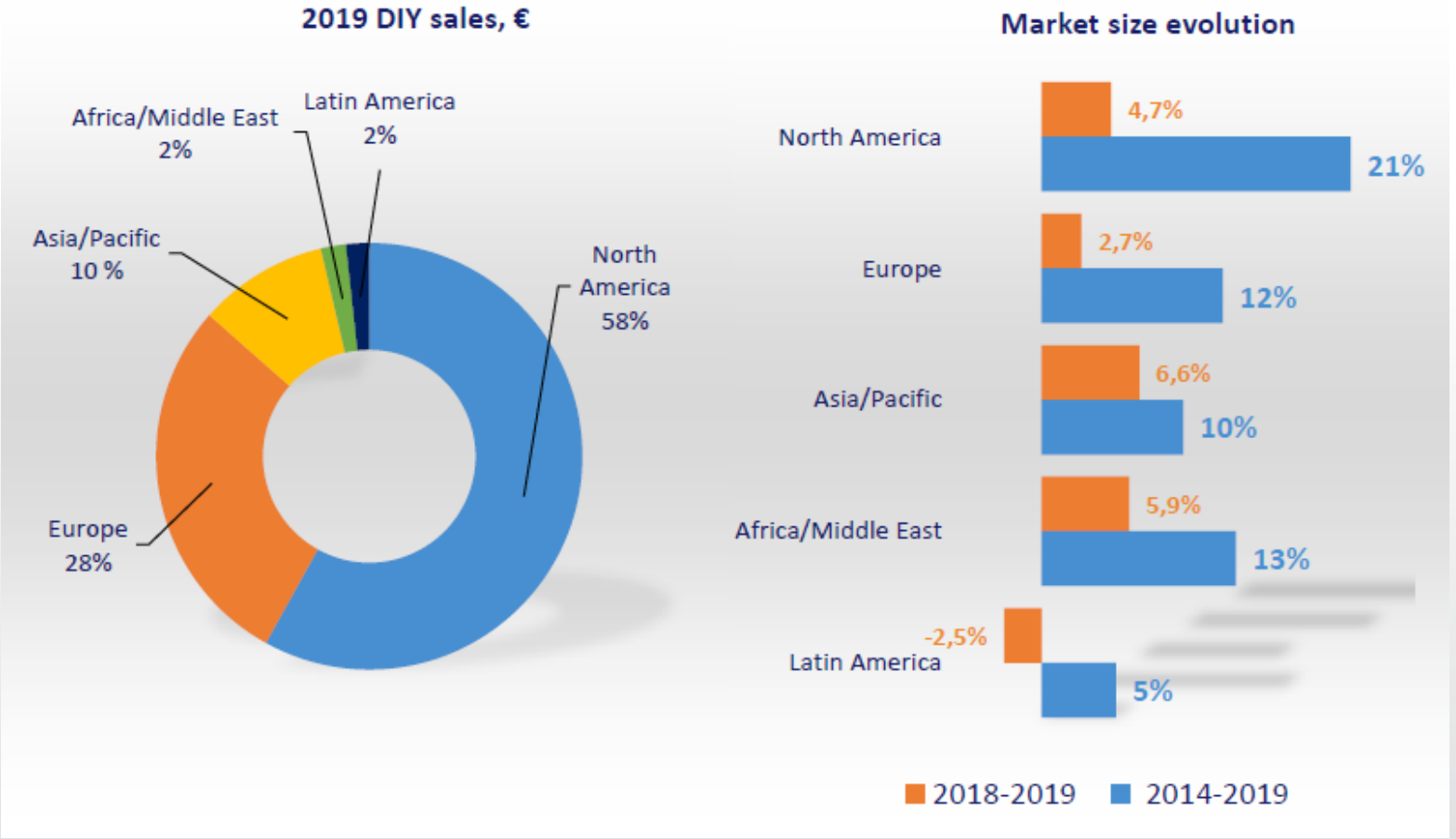
DIY market size by region



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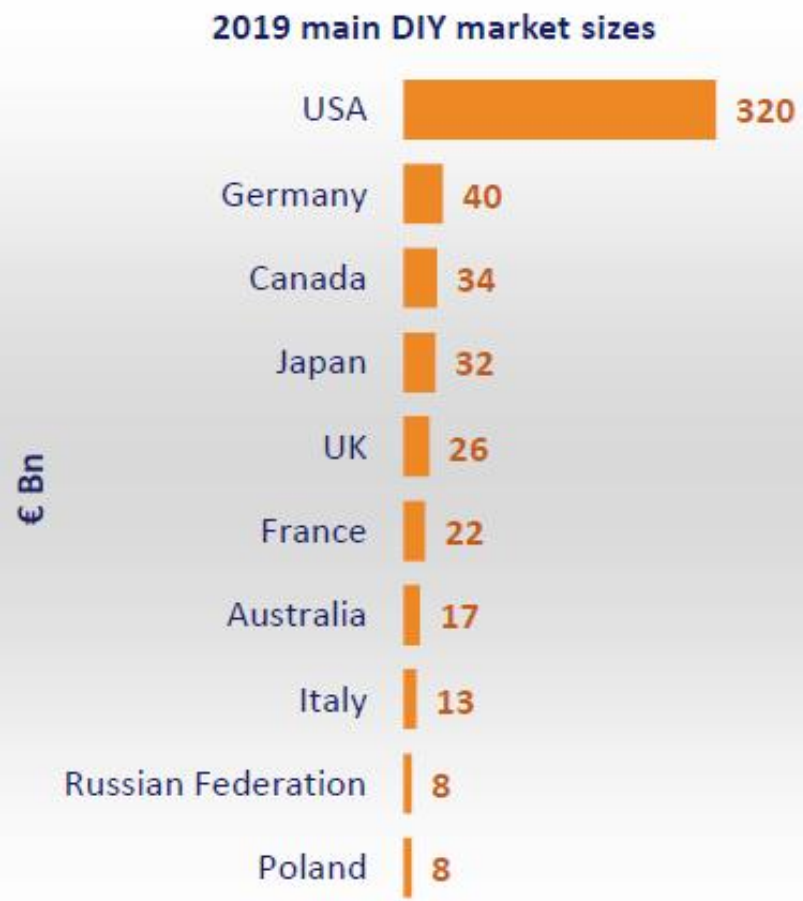
Top 10 markets DIY
average expenditure by region



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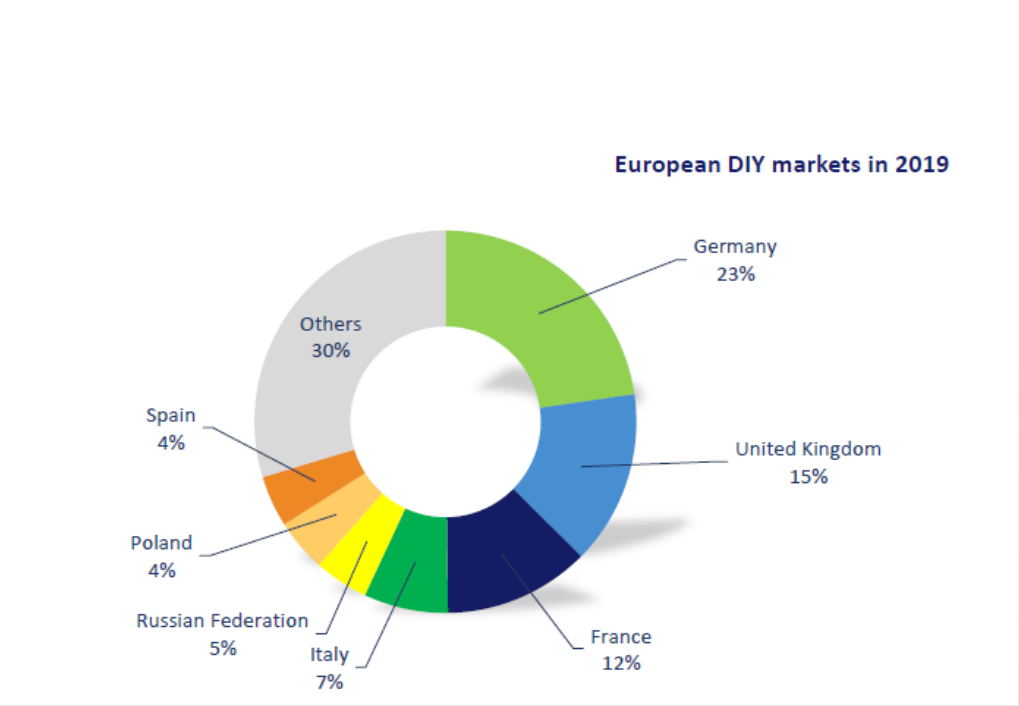
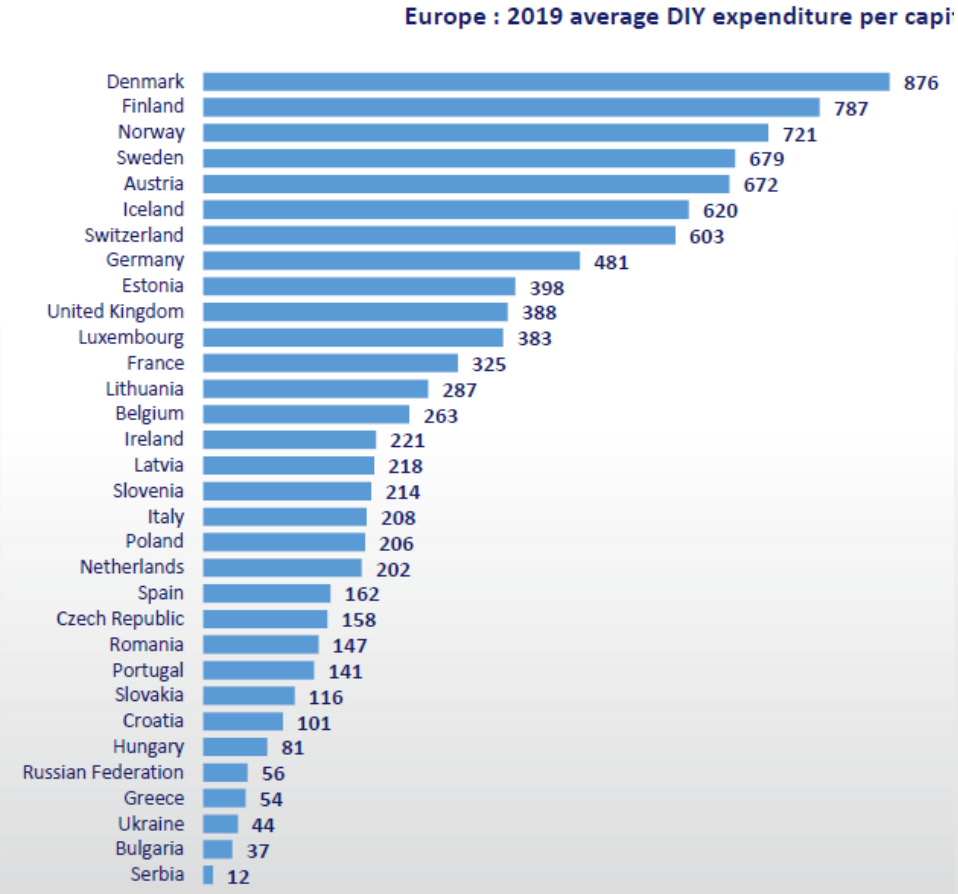
Focus on the European DIY markets





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By country
Example : USA

#1 USA 320 €Bn

1

North America

USA

320 €Bn

+ 4,9 %
Last year
(2018/2019)

+ 22,1 %
Last 4 years
(2014/2019)

% of worldwide DIY sales

DIY Market size evolution

+4,9%(€)
-0,5%($)
Last year
(2018/2019)

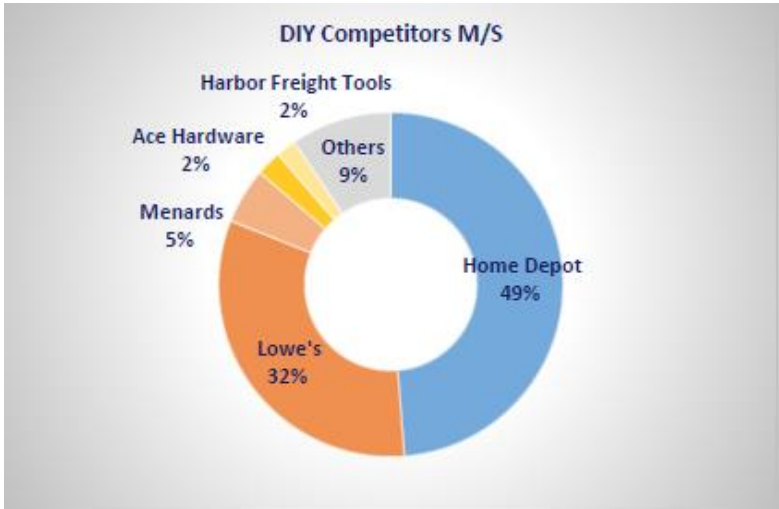
+22,1%(€)
Last 5 years
(2014/2019)

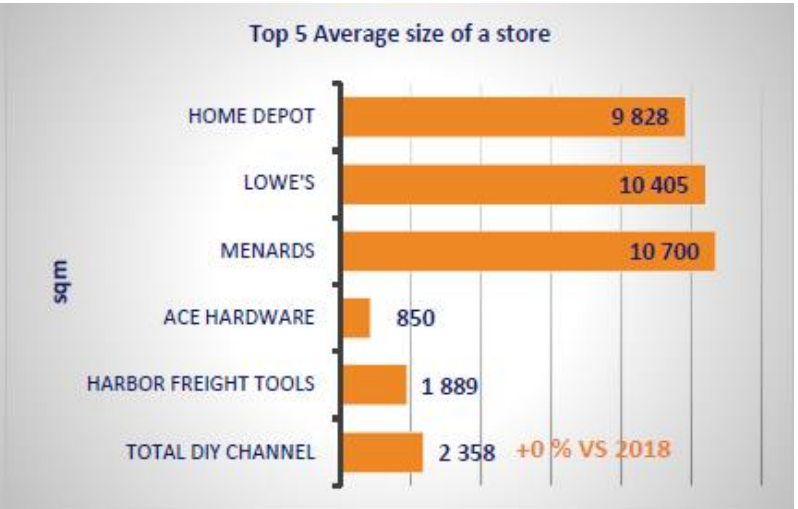
Currency: US Dollar (USD)

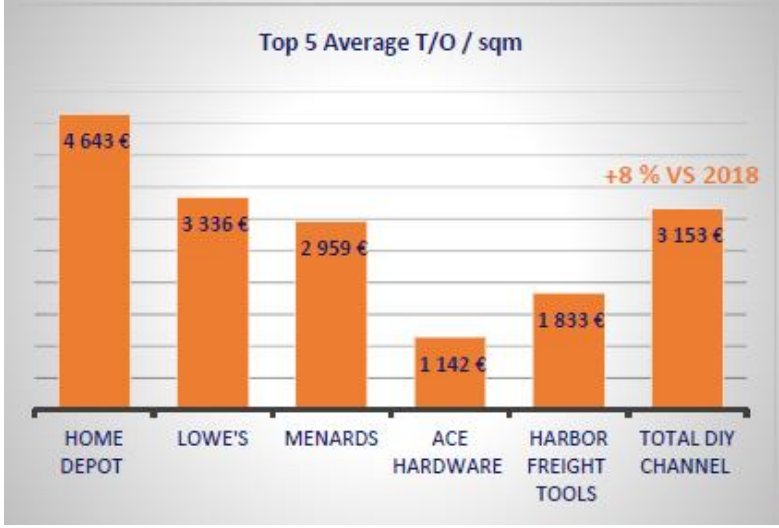
Av. exchange rate VS € for 2019: 0,893409

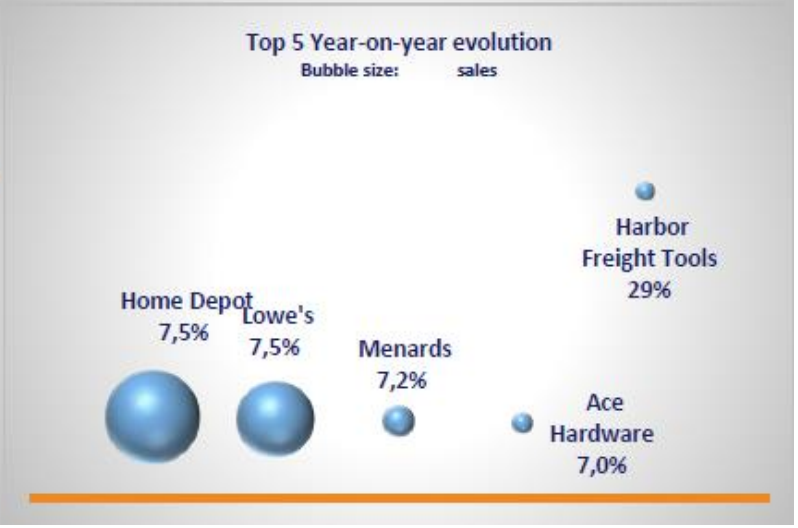
In 2019 USD depreciated VS EUR (-4%)

#1 USA 303 €Bn







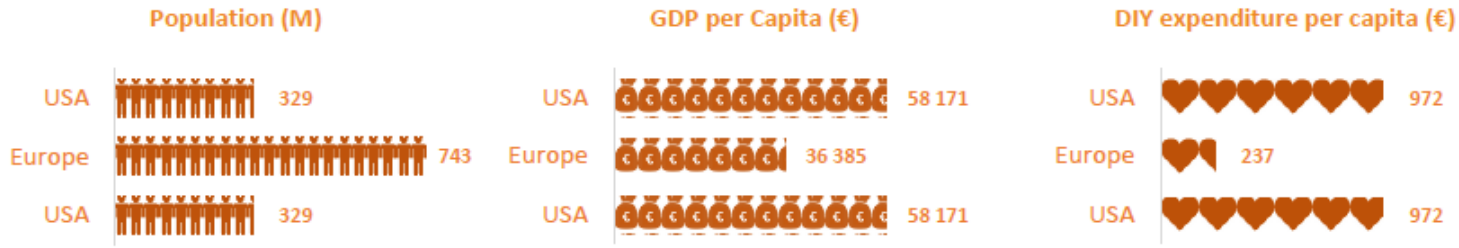


+ 4,9 %
Last year (2018/2019)

+ 20 %
Last 4 years (2015/2019)

#1 USA 303 €Bn

Key indicators



Detailed information

	USA	Europe	USA	World
Demographics				
Population (2019 - M)	329	743	329	7 715
Evolution 2005-2019 (last 14 years)	11%	2%	11%	18%
Economics				
GDP (PPP based) per capita (2019 - K€) Current prices - exchange rate $ VS € : 0,893409	58 171	36 385	58 171	19 700
DIY market (2019 - €Bn)	320	176	320	618
DIY market evolution 2018-2019	4,9%	2,7%	4,9%	4,2%
DIY expenditure per capita (2019 - €)	972	237	972	80
Housing				
Urban population % (2019)	82%	75%	82%	56%
Home ownership % (2018 revised)	65%	69%	65%	-
Human Development Index (HDI) - 2018	0,92	0,87	0,92	0,73

329 million people

82% live in cities

65% own their home

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#1 USA 303 €Bn

Retailer	Owner	2018 Sales (€M)	2019 Sales (€M)	Ev.	M/S	Stores	sqm * 1,000	Av. sqm	TO/sqm (€)	Source
Home Depot	Home Depot	84 234	90 532	*7,5%*	49%	1 984	19 498	9 828	4 643	CI
Lowe's	Lowe's	55 829	59 990	*7,5%*	32%	1 728	17 980	10 405	3 336	CI
Menards	Menards	9 068	9 719	*7,2%*	5%	307	3 285	10 700	2 959	DV
Ace Hardware [1)]	Ace Hardware	4 133	4 423	*7,0%*	2%	4 556	3 873	850	1 142	CI/OE
Harbor Freight Tools	Harbor Freight Tools	2 689	3 462	*28,8%*	2%	1 000	1 889	1 889	1 833	CI/OE
Do it best	Do it best Cooperative	3 010	2 942	*-2,3%*	2%	3 800	2 660	700	1 106	DV
84 Lumber	84 Lumber	2 671	2 773	*3,8%*	1%	264	792	3 000	3 501	DV/OE
Sears [2)]	Transformco	2 503	2 139	*-14,5%*	1%	182	215	1 184	9 931	OE
Sherwin-Williams	Sherwin-Williams	1 889	2 033	*7,6%*	1%	4 106	2 217	540	917	CI/DV/OE
True Value [3)]	True Value	1 824	1 954	*7,1%*	1%	4 500	2 475	550	789	CI/DV/OE
Other chains		5 383	5 751	*6,8%*	3%	2 545	4 011	1 576	1 434	
Total DIY channel		173 232	185 718	*7,2%*	100%	24 972	58 894	2 358	3 153	
Other channels		131 922	134 313	*1,8%*						
Total DIY market		305 155	320 030	*4,9%*						

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By retail
Example : LOWE´S

AFEB ASOCIACION DE FABRICANTES ESPAÑOLES DE BRICOLAJE

BHETA

FEBIN

IVG INDUSTRIEVERBAND GARTEN (IVG) Durch und durch Garten!

Herstellerverband Haus & Garten

MADE4DIY

Unibal Union nationale des industriels du bricolage du jardinage et de l'aménagement du logement

Top 10 retailers

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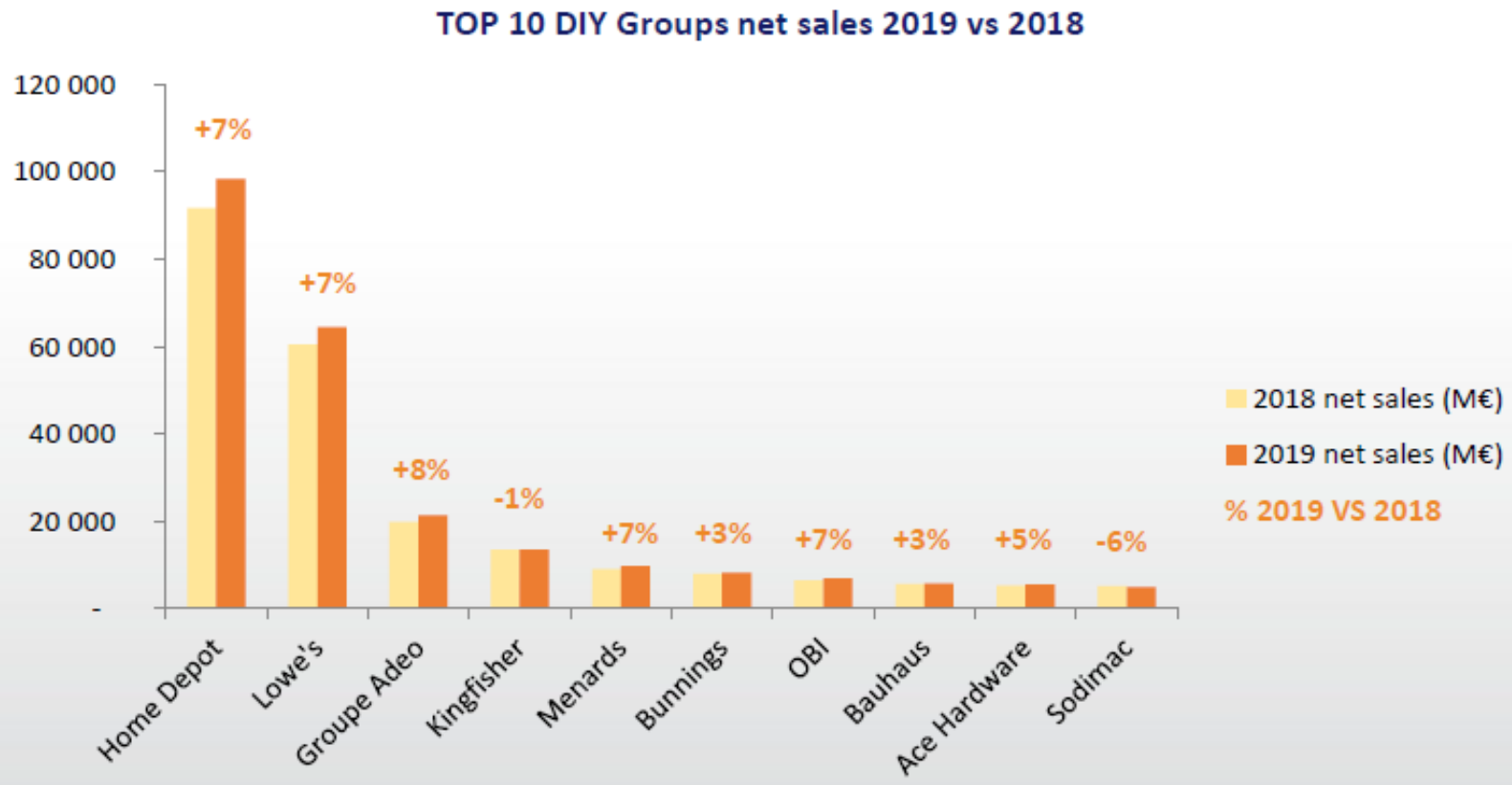
Top 10 retailers 17 vs 16



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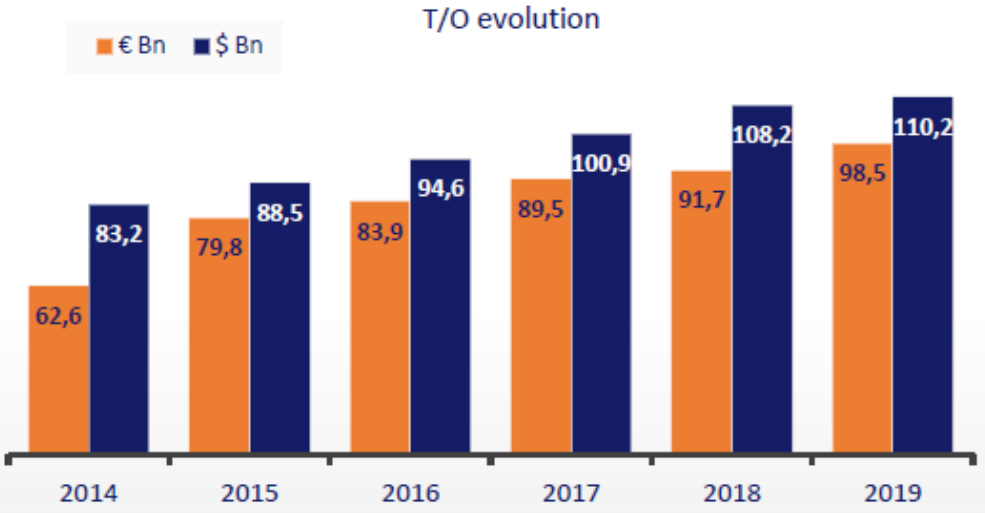
#1
15,9% Worldwide DIY sales

HOME DEPOT

98,5 €Bn



+ 7 %
Last year (2018/2019)

Base : €

+ 10%
Last 5 years average (2014/2019)

THE HOME DEPOT, Inc.
2455 Paces Ferry Road, Atlanta, GA 30339-4024
United States
Tel (+1) 770 433 8211
www.homedepot.com

Craig A. MENEAR
Chairman, Chief Executive Officer and President

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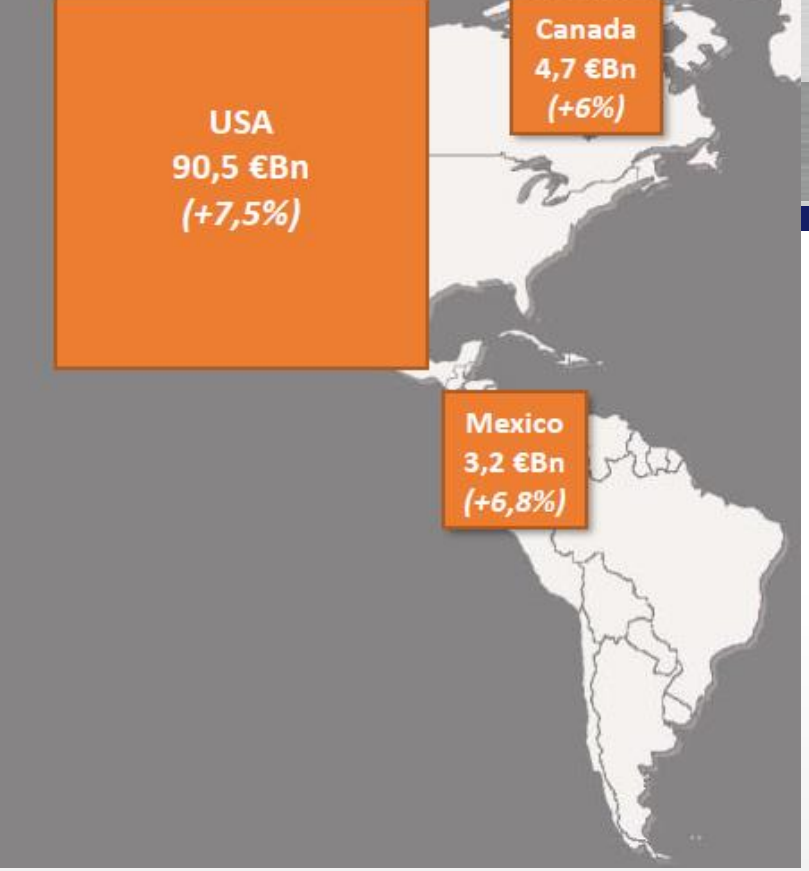

HOME DEPOT

98,5 €Bn

Operating countries and retail chains

Country	Retailer	2018 Sales (€M)	2019 Sales (€M)	Evolution	Stores	Sqm * 1,000	Av. sqm	TO/sqm (€)
USA	Home Depot	84 234	**90 532**	***7,5%***	1 984	19 498	9 828	4 643
Canada	Home Depot	4 445	**4 710**	***6,0%***	182	1 789	9 828	2 633
Mexico	Home Depot	3 028	**3 235**	***6,8%***	125	1 228	9 828	2 633
Total		91 706	**98 476**	***7,4%***	2 291	22 515	9 828	4 374

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