



HIMA

HOME IMPROVEMENT MANUFACTURERS ASSOCIATION

NEWSLETTER

APRIL 2023





Latest

02.02.23 - 03.02.23 – HIMA Physical General Managers and Board Meeting in Berlin, Germany

28.02.23 – HIMA – EDRA Joint Board Meeting + Dinner with MEPs, Brussels, Belgium

Upcoming

20.03.23 – HIMA Physical General Managers and Board Meeting at BHETA, in Birmingham, UK

Reports available

1. Sustainability Trend Report – [access here for free](#)
2. Global DIY Webinar about The New Home Improvement Report Worldwide [access here](#)
3. Statistics Home Improvement Retail – enquire pricing in local association
4. DIY Retailers Worldwide - enquire pricing in local association

9th **Global**
DIY-Summit
2023

14 – 16 June 2023
Berlin, Germany

Register here: [TICKETS](#) (HIMA Member Price)

Sponsorship Opportunities are available here: [PACK](#)

Event programme: [DOWNLOAD](#)

Event Video : [SEE](#)



Market update

In view of the difficult framework conditions in the past year, the garden market was able to hold its ground at the 2021 level. However, taking into account the price development, it tended to be in the red - like almost all consumer goods markets. The first months of this year were also rather restrained. The further development depends on how the start of the season continues.

News

2023/02/23 IVG Medientag Garten was held in Cologne, where about 40 IVG members presented their latest products for the coming season to media representatives.

2023/02/28 IVG annual report published



UK

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News

New DIY member:

TIMCO - a supplier to independent retailers producing quality everyday essentials made for the trade and, a new Business Associate STRONG & HERD offering Import and Export trade services

BHETA webinars:

Reporting for Extended Producer Responsibility (EPR) and Environmental, Social and Governance (ESG)

Connecting businesses- Business request / proposals / questions
and queries to other associations

BHETA is looking to connect with key contacts of international DIY retailers that will open up trading opportunities for our members

**Germany**

Market update

January to November 2022 the turnover of the DIY stores in Germany was about 20.38 Billion € and + 8.5% compared to the previous year. Regarding an inflation of about 9% for the DIY Stores in 2022 the price adjusted turnover was about -1.5% compared to 2021. Because of the price increases for gas and oil, heaters sold very good. This led to very good results for sanitary/heating, with a turnover of 25.8% above the previous year. The automotive sector was also very strong, with +36.3%, followed by electrics with +12.8% (also because of the heaters) compared to 2021. The numbers for timber (-3.6%), seasonal articles (-5.4%) and garden supply (-3.6%) weren't as good compared to the previous year.

News

New Cooperation:

- ❑ Worms University and the Herstellerverband Haus & Garten e.V. have concluded a cooperation. The cooperation documents were signed by our CEOs and by the President of the University of Worms at our Spring Conference. The aim of the cooperation is a new degree course - "Handels- und Vertriebsmanagement" mit Schwerpunkt
- ❑ "DIY- und Baumarktmanagement für Handel und Industrie" - that is intended to give interested dual students a deeper understanding of the DIY market. The new degree course will be taught by industry expert Prof. Dr. Nektarios Bakakis and Prof. Dr. Dirk Schilling and supported by our member companies.

Past Events:

- ❑ The year started with a webinar on the German "Gas- and Electricity Price Brake" in cooperation with an energy consultancy.
- ❑ In February 2023 we held a seminar on the legislative changes in competition law. EU competition law opens suppliers in Europe more room to manage online sales and introduce pricing structures taking into account cost differences in the different sales channels. Also, in relation to direct and dual distribution, suppliers require a robust compliance system preventing their organization from anticompetitive information exchange. The Seminar was held by a top tier law firm.
- ❑ In February 2023 we had a Webinar on Upcoming changes in Product Safety Law in cooperation with one of the national experts on this topic.
- ❑ 1st March 2023 our annual Spring Conference took place at the University of Worms.

New members: 1



Events – Open for international participation

EVENT

Webinar "Verpackungskennzeichnung in der EU"

WHO CAN ATTEND

All HIMA Members fluent in German

LOCATION

Online

DESCRIPTION

Together with Vere e.V. we will give our member companies a brief overview regarding current regulation on packaging labelling under waste law in Europe. The Webinar will be held in German (no translation possible).

TO ATTEND

You can register here : <https://herstellerverband.de/anmeldung-webinar-verpackungskennzeichnung/>

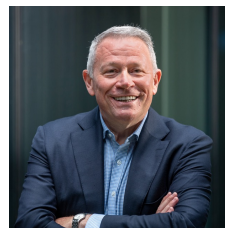
The Link for the meeting will be sent after registration.

WHEN

25.04.2023 10:00 Uhr - 11:30 Uhr

PRICE

FREE



Market update

DIY & Garden are losing when comparing sales results of the total **2022 with 2021**. Pet remains status quo.
DIY – 7.3% Garden – 11.3% Pet +0.2%

On the short term (January '23 vs '22)

DIY and Garden are losing more than in 2022. Only Pet can improve slightly.
DIY – 11.3% Garden – 17.0% Pet + 0.7%

In January, in the DIY sector, 5 segments can improve their sales compared to January '22 with double-digit growth. In total, 10 of the 34 DIY segments can improve their sales.

4 segments grow with double digits, but these segments are relatively small :

Beauty/Persona lCare/Hygiene +22.5% (mirrors)
Food/beverages/smoking +21.7%(snacks & drinks)
Personal Accessories +18.4%(backpacks /shopping bags)
Care/Food for animals +12.4%(treats for pets)

Over 2022 - the market was down by 3,8%

News

Past events :

- New years drinks 19/01 where industry leaders and retail came together
- On 09/02 we had a business club with 4 speakers, thereunder Maxeda - about the launch of their new platform, several other testimonials and a presentation of a startup Twintag - relevant for our sector

The workshops we decided on the strategy meeting 2019 - are rolled out :

- Data: we started a contract with a challenger of GFK - Fullmoon, the sell-out data are based on GSI database - segments and BRICS and are already in the basic version delivering deeper insight for suppliers
- Supply chain is currently on hold whilst waiting for the answer from the Government to grant us a subsidy
- CSR - in different workshops we will continue to set up a roadmap for the suppliers association and then start to help to inspire suppliers, set up knowledge events etc...

Future events - see <https://www.himabenelux.org/nl/events>

- 25/04 General assembly for member and mini congress
- 06/06 Company visit and speaker about AI

New members: 3



Events – Open for international participation

EVENTS

See all future events: <https://www.himabenelux.org/nl/events>

25/04 - General assembly members and mini congress with 4 speakers

06/06 - Visit @ Eltra and speaker about AI

WHO CAN ATTEND

General assembly only member with voting rights

Connecting businesses- Business request / proposals / questions and queries to other associations

Actions of HIMA to support its members :

We took action to defend our member's interests at the EU- commission by a position paper send to SME united in the following EU - files :

- ☐ The directive about product Liability - to defend the position of members producers and distributors
- ☐ The Eu late payment directive - to get payment terms repeated and penalties regulated
- ☐ The Eu - waste directive: to try to get a more harmonized labelling in EU and recycling of packaging.



Market update

After the difficult second half of 2022 marked by a strong energy crisis and heavy growth of consumer prices, the first months of 2023 show a slight improvement in the purchase propensity of Home Improvement products.

Despite all, the spending power of Italian households remains limited due to the inflation still present (still around 6%).

Among the home improvement sectors with the best performance in the first 3 months of 2023 we find furniture products (+ 7% compared to the same period of the previous year).

The new "Furniture Bonus 2023" launched by the government has given new impetus to the intention to buy furniture.

Positive signals also from the building sector, especially for the products related to energy efficiency.

The segments of which are all positive: thermal insulation (+1.2%), photovoltaic or solar thermal systems (+3.6%), condensing and biomass boilers (+6.9%), fixtures and fittings (+10%), heat pumps (+22.6%).

More generally, the entire DIY segment has registered positive trends, hand and power tools and DIY equipment in general has registered +10.1% (respect the same period of 2022).

News

INTERNATIONAL HARDWARE FAIR ITALY:

FOCUS IN THE DIY SECTOR WITH MADE4DIY

A few months away from its debut scheduled for 5-6 May 2023 in Bergamo, International Hardware Fair Italy, the new international project for the European market, keeps growing.

The confirmation of the partnership with the MADE4DIY consortium, a collaboration that has already produced excellent results at INTERNATIONALE EISENWARENMESSE, points in this direction. MADE4DIY is the Italian association of manufacturers in the sector of large-scale retail distribution. The project started in 2013 with the subscription as an official member to the HIMA (Home Improvement Manufacturers Association) network - the main association at European level for the DIY and Home Improvement sector. The aim was to promote the development of synergies at an international level.

New members: FAMI S.r.l. and CORDIFICIO FERRETI S.r.l.



Events – Open for international participation

EVENT

BRICONIGHT / BRICODAY

WHO CAN ATTEND

All HIMA member companies - but we can provide only 30 places available

LOCATION

MILAN

Briconight : MI View, Via Achille Papa, 30
Bricoday : Mi. Co. , Viale Lodovico Scarampo, Gate 5

DESCRIPTION

BRICONIGHT is the main conference and networking event dedicated to the Italian Home Improvement and Gardening market. BRICONIGHT is organized directly by MADE4DIY, as the reference association in Italy for the DIY and garden sector.

The event takes place in parallel with the main trade fair of the sector, Bricoday, in which MADE4DIY has a strong presence of exhibiting companies in its collective stand. Bricoday is the main partner and sponsor of the conference.

Briconight involves the main operators in the DIY and garden sector.

In the 2022 edition attended more than 160 participants and over 70 companies; Italian/European retailers, Italian/European manufacturers, wholesalers and service providers.

The event always provides insights of the latest industry trends presented by top speakers. New Paradigms to face the market and be competitive.

TO ATTEND

For information and confirmation: Luca Gaudenzi - luca.gaudenzi@made4diy.com

Website: <https://www.briconight.it/>

[LINK TO BROCHURE WITH PRESENTATION AND INFO - OFFER FOR HIMA MEMBERS](#)

WHEN

BRICONIGHT - 28 September 2023
BRICODAY - 29 September 2023

PRICE

Offer reserved to HIMA members

Briconight + Bricoday package € 120,00 :

Includes an entrance for one person to the Briconight event, 28 of September (welcome cocktail, conference, dinner).

+ Free entry with guided tour and lunch at the Bricoday fair 29 of September



Spain, Portugal

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Market update

59% of the companies that responded to the Market Situation Survey, at the Winter Assembly and Forum held on 21 March, believe that 2023 will have a very similar evolution to that of 2022. 34.4% say the impact has been great, compared to 6.6% who consider it has been very slight.

Almost 46% of manufacturers have increased their margin compared to the same period in 2022 as opposed to 39.3% who say that their margin has decreased and 14.8% who consider that it has remained stable.

45.9% increased their sales by between 1% and 30%, 14.8% said they had remained stable and 39.3% reported a decrease of between 10% and 30%.

47.5% of the companies surveyed are still suffering from stock-outs due to the supply crisis and problems with freight.

In addition, 44.3% of the companies have supply problems, 49.1% believe that these costs (gas, diesel and electricity) will continue to rise in the coming months and 47.5% expect the cost of materials to rise as well.

Regarding sustainability, 98.4% of those surveyed said that their company is taking or plans to take some action on this issue in the near future, which indicates the sector's commitment in this area.

News 1

General Assembly and Winter Forum of AFEB in the Cívitas Metropolitano of Madrid

On Tuesday 21st March, the AFEB 2023 General Assembly and Winter Forum was held in Madrid, with the participation of 150 people.

Carlos Martín, General Manager of WD-40, who was elected president of AFEB for the next 4 years, explained the main challenges that the Association will face during the next four years:

- ☐ To increase the number of members: this will allow the Association to obtain more resources, as well as a greater representation of the Sector.
- ☐ Getting to know all members in greater depth in order to provide a better response to their interests while sharing relevant information.
- ☐ Enlargement of the board of directors to make it more representative of what AFEB is and to be able to devise and develop more projects.
- ☐ Continue to set up expert committees and collaborations with other agents in the sector such as the press and other associations.
- ☐ To continue with the digital transformation, both for AFEB and its member companies.
- ☐ Support members in ESG (environment, social responsibility and governance) issues, where many regulations and legislation are expected to come.





Market update

JANUARY 2023:

Still well helped by the inflationary context, sales in the building trade also benefited from a favorable calendar in January 2023 (an additional weekday). Thus, the turnover of the profession increased by 10% compared to the same period of the previous year. Over the past twelve months, building trade activity has grown by 7.5% year on year

GSA, the DIY-garden department remained stable in January 2023 (-0.1% of turnover) compared to the same month in 2022. Building products (+23.9%) and hardware (+9.1 %) offset losses in decoration (-9.3%) and electricity (-4.6%). The Garden department is still limited to the back of the department, before the locations and promotions to follow in February.

On the garden center, the reading is quite different. Gardening sales fell by 7.7%. All the main categories are down: -4% for plants, -14.4% for garden products, -11.2% for landscaping.

News

This year, INOHA is stepping up on two topics in particular: **CSR and DATA**. Two new newsletters will be devoted to them.

DATA news, every first Friday of each month, will come back to the important figures of the month which is ending on the various markets of the GSB, the Trade, but also the GSA and the Garden center. And so that INOHA members have a head start, qualitative studies will allow you to follow trends.

CSR news, every third Friday of each month, will cover regulatory news, useful information, good practices, regulatory sheets available on our Intranet as well as all the webinars and support that we will offer you. members

New members: 4

Connecting businesses-

Business request / proposals / questions
and queries to other associations

No questioning of the Triman regulations in France despite the procedure of the European Commission.