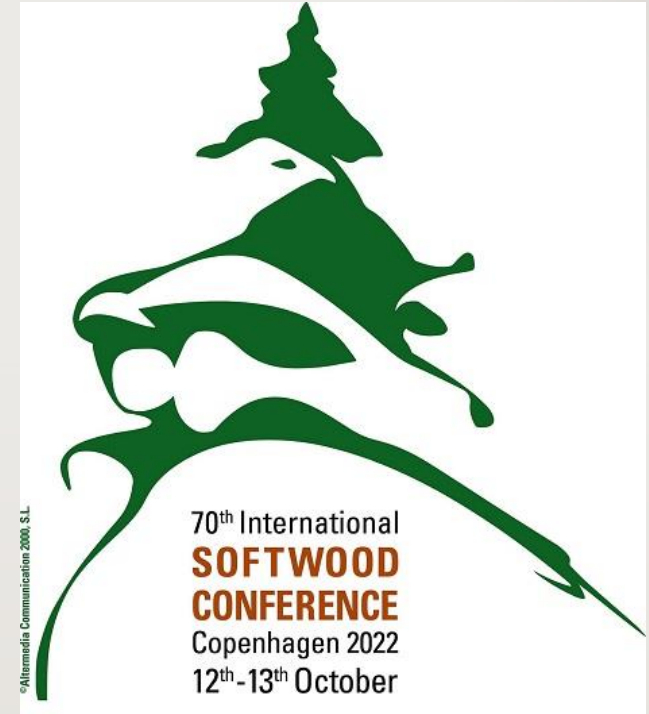




**ghin**

European DIY Retail  
Association (EDRA)

Global Home Improvement  
Network (GHIN)



## DIY Perspective

John W. Herbert  
General Secretary - EDRA/GHIN

# DIY & Home Improvement Retailing



**EDRA/GHIN brings together the world of home improvement.**



Our membership includes **219 home centre companies** operating over **33,000 stores** in **76 countries**. Generating over **1.7 million jobs** and serving millions of customers around the world every day.



EDRA/GHIN's Mission is to  
Improve the Quality of Home  
Improvement Retailing Globally.

Our belief is that everybody has  
the right to a comfortable and  
secure home.





**Last year the global DIY Market saw sales of  
770 Billion Euros**

# Global DIY Market Evolution



# Global DIY Market Sizes

**#1 North  
America  
460 €Bn**

**#2 Europe  
221 €Bn**

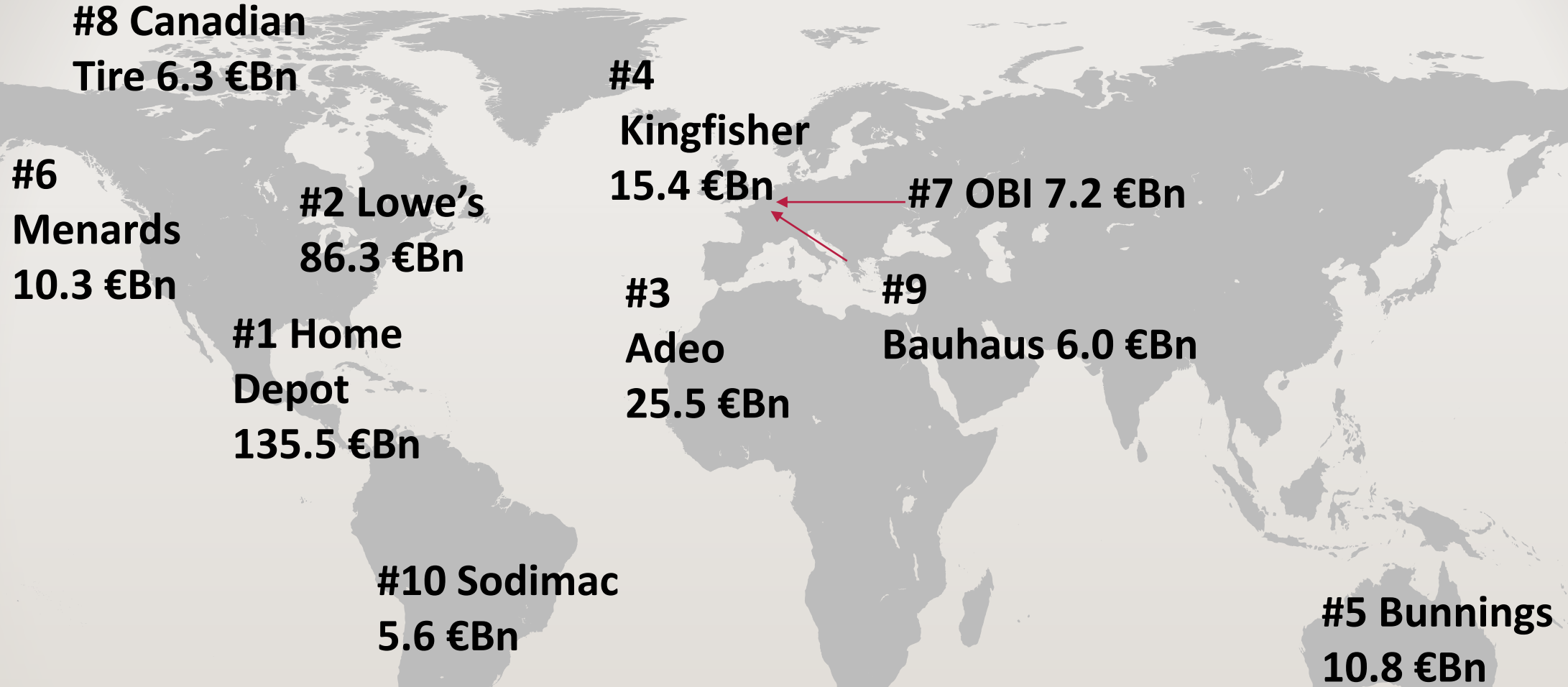
**#4  
Africa/Middle  
East  
12.7 €Bn**

**#5 Latin  
America  
11.7 €Bn**

**#3  
Asia/Pacific  
64.2 €Bn**



# Top 10 DIY Groups Worldwide






Europe is currently going through instability that has not been seen for generations:

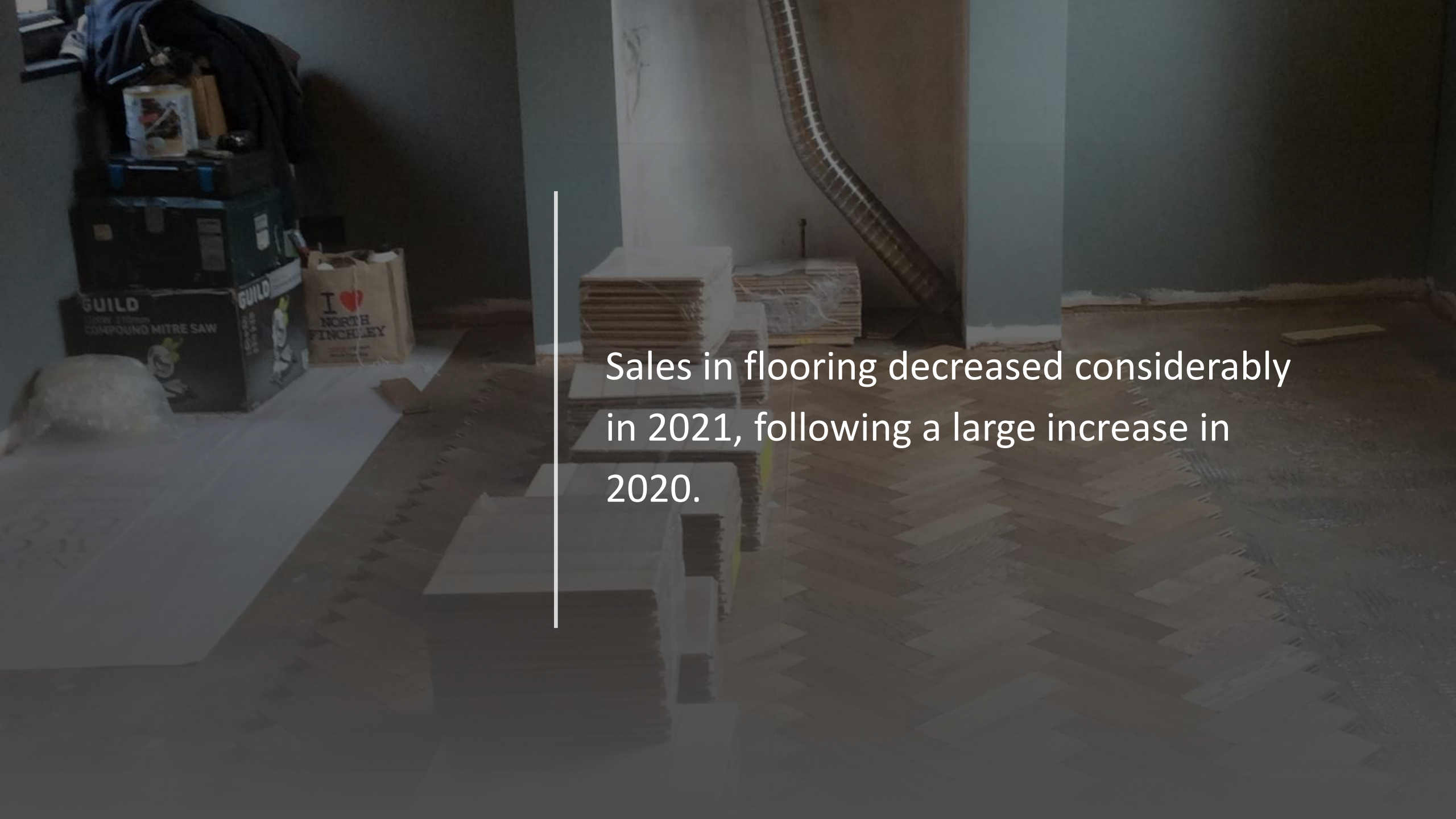


- We are experiencing a land war in Europe
- The energy crisis
- Inflationary pressures
- Covid – 19 – still present
- Refugee influx
- Shortage of raw materials
- Difficulty in finding employees



The timber trade makes up approximately 10% of sales in the DIY Store.

Sales in 2021 saw an increase of only 4.4%, although prices increased by almost 30%.



Sales in flooring decreased considerably in 2021, following a large increase in 2020.



## Price fluctuations

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- Prices have considerably increased in 2022, although we are now experiencing a calmer market and prices are slightly receding.

# Lumber will be the building material of the future

Lumber is a natural product, and consumers are demanding these types of products more and more as sustainability continues to be thrown into the limelight.

However, due to the trend that many construction projects are currently being withdrawn, partly due to inflationary pressures, the timber trade is also expecting somewhat uncertain business in the coming months.

Wood will not only be a building material in the future, but also play a vital role in sales of decorative goods



# Collaboration in Trade

With the unpredictability we are currently experiencing home improvement retailers are looking for reliable partners for the sourcing of their products and are relying less on the “on-the-spot” market where product quality is unpredictable.



# War in Ukraine

Russia is offering lumber to retailers, but no retailers in the western world want to buy it.

Sanctions are also influencing the flow of goods to and from Russia



# Wood as an energy source

As reported by the German Federal Statistical Office (Destatis), the prices for firewood and wood pellets increased by 85.7 percent in August 2022 compared to the same month of the previous year.

Especially since the outbreak of war in Ukraine at the end of February 2022, wood as an energy source has come into focus. From March to July 2022, almost 311,000 tons of firewood and wood pellets worth around 79.0 million euros were exported from Germany - that was 30.3 percent less than in the same period of the previous year.

From March to July 2022, 700,300 stoves worth around 120.6 million euros were imported to Germany - that was 8.4 percent more than a year earlier.

Source: <https://www.baumarktmanager.de/preise-fuer-brennholz-und-holzpellets-steigen-im-august-um-85-7-prozent-22092022>





# Future Home Improvement Retailing



## Shorter shopping hours

Due to the energy crises, stores may reduce their shopping hours to save energy and heating and lighting costs.

Store opening hours should return to normal in the spring.



# Stationary stores are still key

There is a growth in online, but despite the Covid-19 pandemic, people are returning to stores.

Brands and banners have to offer an omnichannel experience.



Continued increase in millennials taking up home improvement and creative projects



**RUNTER VON DER COUCH, RAN AN DIE WERKZEUGE!**

**MACH MAL mit OBI**

**ALLES MACHBAR** 😊



# Sustainability: More attention than ever



Companies that do not take social and environmental responsibility seriously will not succeed in tomorrow's market-place.

Further to this, governments are now pushing the sustainability agenda more forcefully.

The energy crises has demonstrated how reliant we are on non-renewables.



Taking everything into account EDRA/GHIN recognise that the DIY & home improvement sector has taken a new relevance following the Covid-19 pandemic.

Although the market will not reach the heights experienced in 2020 and 2021, we are optimistic that the future market will remain robust and agility will be the defining factor of future success stories.





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Thank you