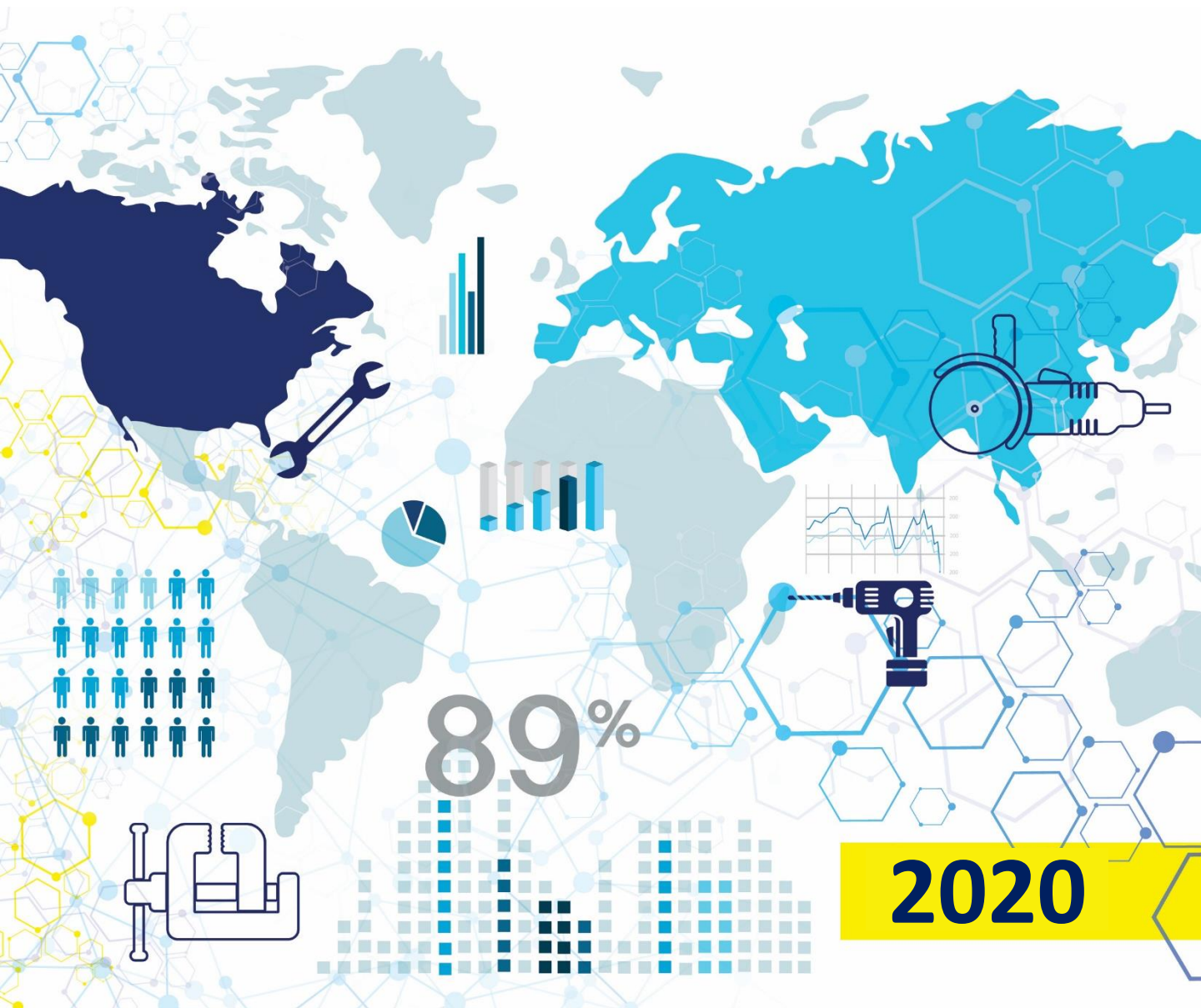


GLOBAL HOME IMPROVEMENT

Report



Foreword

We are pleased to introduce the 2020 Global Home Improvement Report.

As much as possible, and as every year, the statistics of the previous reports have been confirmed by the international members of EDRA/GHIN. Despite the disruption caused by the Covid-19 pandemic we have continued collecting data and ensuring its reliability. We wholeheartedly thank everyone who helped us and provided us with data to make this report a reference for the world of DIY.

To mark its 20th anniversary, the Federation of European DIY Manufacturers (fediyma) has relaunched as HIMA, the Home Improvement Manufacturers Association. This relaunch comes with a new industry mission, “We enable our members to face the future”, which will be achieved through the three pillars of : Networking, Knowledge and Lobbying. The association will expand globally, welcoming new members from outside the European Union, sharing best practices and fostering networking amongst its worldwide members.

The Covid-19 pandemic has shaken our beliefs and our organizations. Now more than ever, the role that our members' businesses play in their customers lives has been highlighted. We have seen the incredible adaptability of our members' companies and are confident that the challenges faced since the outbreak of Covid-19 will lead to new and innovative solutions.



Ralf RAHMEDE, General Manager, HIMA
John HERBERT, General Secretary, EDRA GHIN

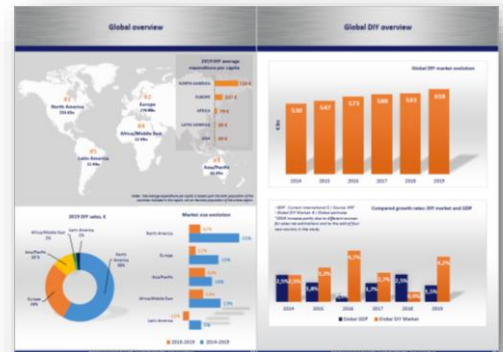
Audrey VAN DEN BERG, Market Analyst, in charge of
the 2020 Home Improvement Global Report

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Section 1: Global Analysis

This section aims to provide an **overview of the global DIY market:**

- Global market size evolution
- Main regions: market sizes, evolution, average DIY expenditure per capita
- Main DIY national markets
- National average DIY expenditure per capita
- Focus on European DIY markets



Section 2: Countries

This section provides 2-pages of **synoptic information for the major DIY markets**, in decreasing order of market size:

- On page 1 you will find the key indicators at a glance: population, GDP, DIY market, DIY average expenditure...
- On Page 2 you will find information on the Top 10 DIY retail chains in the country: 2018 and 2019 sales, number of stores, and total sales surface.
- For Countries with more than 10 DIY retail chains, a comprehensive table is included.



Section 3: Major DIY Groups

This section presents the **major groups on the DIY market** at worldwide level. Details are given for the Top 10 groups through a double page overview: T/O evolution, global market share evolution, operating countries and retail chains.

At the end of the document, information is provided concerning the main DIY groups and money conversion.



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Methodology (1/3)

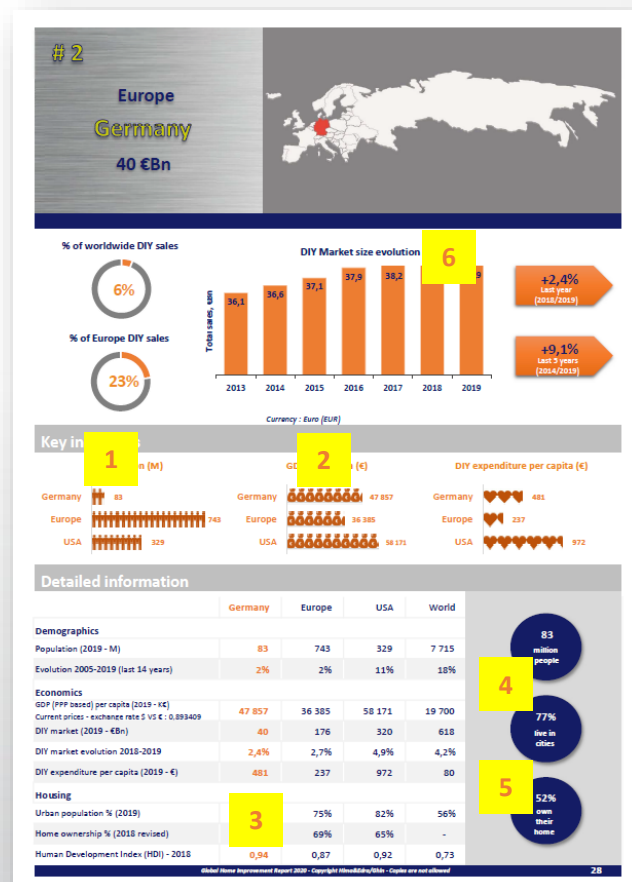
Demographics and Economy

In the country profiles, the general indicators are based upon national or international statistics. As follows :

- The source for the **Total Population** and the **Population Growth** is the *United Nations, Department of Economic and Social Affairs, and Eurostat*. 1
- The **GDP per capita** is PPP based (Purchasing Power Parity). This way of calculating takes the costs of living into account. The datasets come from the *IMF (International Monetary Fund)*. 2
- The **Human Development Index (HDI)** is a composite statistic of life expectancy, education and per capita income indicators, which are used to rank countries in terms of human development. Data is provided by The *Human Development Reports* from the *United Nations Development Programme*. 3
- The **% of Urban Population** comes from the *United Nations Department of Economic and Social Affairs*. 4
- The **% of Home Ownership** is not available for all the countries. It comes from different sources : 5
 - European countries: *Eurostat*
 - Russian Federation: *Statcan / Federal State Statistic*
 - USA: *US Census Bureau*
 - Japan: *Statistics Bureau of Japan*
 - China: *Beijing University of Social Sciences*
 - Turkey: *Turkish Statistical Institute*
 - Brazil: *INEG Brazil*

DIY market sizes 6

- Sales are net sales to consumer, excluding VAT and converted into Euro.
- The exchanges rates considered in the report are the yearly historical average ones.
- In some cases, the 2018 sales figure have been corrected. The 2019 sales figure may be our own estimate when the number of stores or the sales areas are imparted on the company's website or 2019 annual report.



Methodology (2/3)

Retailers' sales figures

In order to make this document a better decision-making tool, we specify the source of the sales figures we mention in the document. We used the following **code**, in decreasing order of data reliability: **1**

- **CI: corporate information** (either Annual Reports, websites or directly provided by the company)
- **EM:** data provided by **EDRA/GHIN Members**
- **DV:** data coming from **Dähne Verlag 2019 survey** (www.daehne.de)
- **OE :** data from **our estimate**. This information may not conform to reality. It is a mere estimate of the sales figure when no data is available.

For 2019, 51% of global T/O is based upon Corporate Information, 22% from EDRA/GHIN members, 20% from Dahne Verlag, and 8% upon our own estimates.

Please note that this code only refers to the 2019 sales figure. In many cases, the 2018 sales figure are already known, so the source may be different for the 2018 sales figure and the 2019 sales figure.

When unknown, the 2019 sales figure is estimated taking into account the following information, according to their availability:

- 2018 net sales
- 2018/2019 total surface or stores change
- 2018/2019 national market size change
- Inflation index

Stores and surfaces

2

- Net sales, number of stores and total sales surface can come from different sources.

- In some cases, the source may differ from the specified source for the 2018 sales figure. For

instance, for one retailer, the sales figure may be our own estimate whereas the number of stores is imparted on the company's website.

In general, when the total sales surface is unknown, it is estimated from the average surface of comparable retail chains in the same country.



Methodology (3/3)

Money conversion

In order to consolidate data at a worldwide level, all sales figures are converted into Euro. The evolution of exchange rates makes it difficult to compare year-on-year evolution between Eurozone and no-Eurozone countries. For instance, a country whose currency appreciated against Euro will seem to grow faster when converted into Euro than in local currency unit. At the end of the document, you will find the information about money conversion. The exchanges rates considered in the report are the yearly historical average ones.

Definitions

- Sales figures are **sales to consumers (net sales excluding VAT)**.
- In this study, **the overall size of the DIY market is estimated through consumer sales (net sales excluding VAT) and by adding all DIY groups net sales.**
- Sales surfaces are stated in **sqm**.
- By « **Other channels** » we mean the following channels: builder's merchants, timber merchants, hardware stores, garden centers and rural equipment stores.
- **Food retail** is excluded from this survey.
- Some **Department Stores** in the US are reported in this survey, but only their DIY sales are included.

Warning

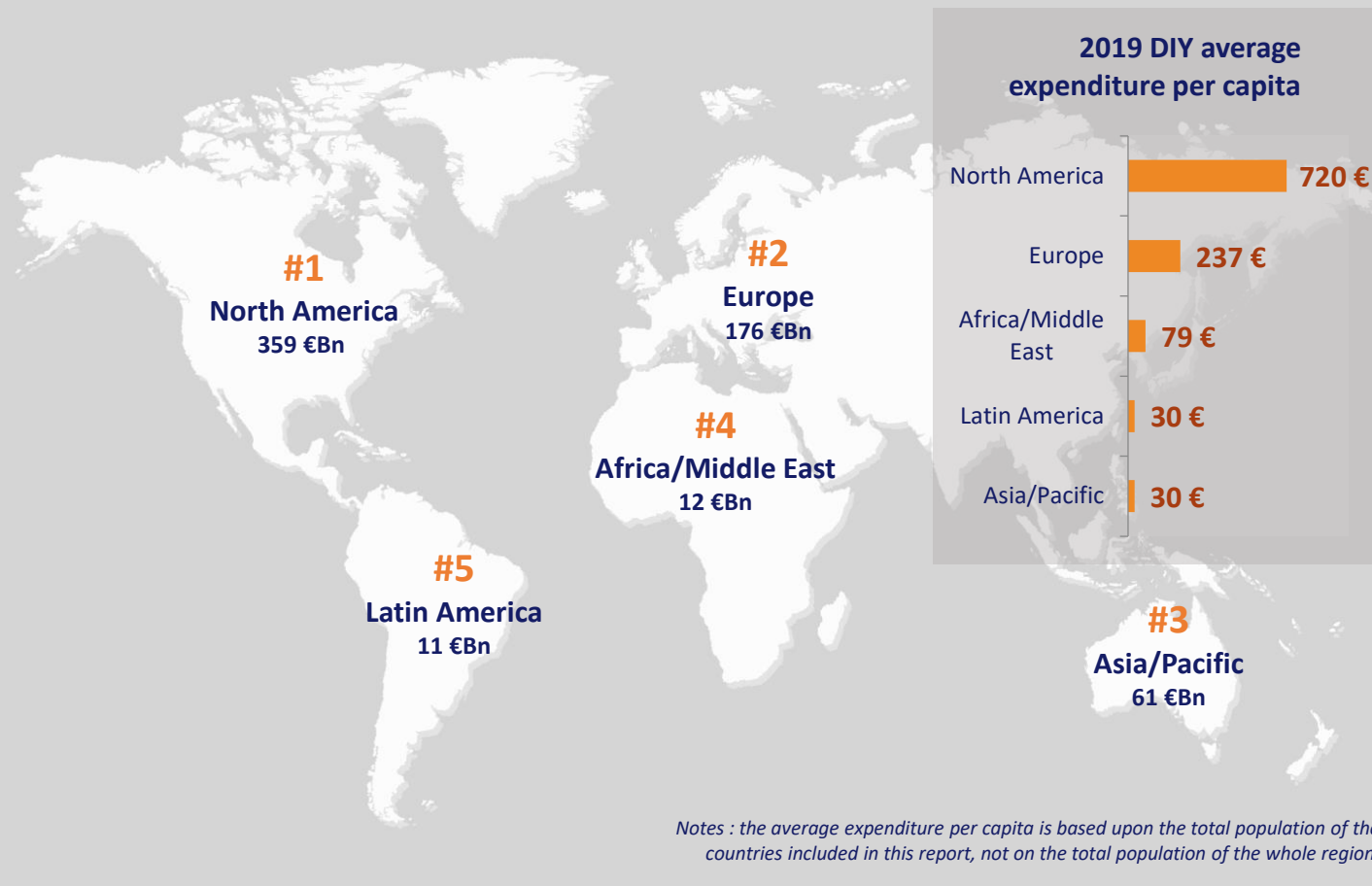
- This study does not take into account professional networks, small independent retailers, general store departments, hypermarkets and supermarkets and sales by pure-players on the Internet (Amazon, Mano-Mano, Alibaba, etc.).
- The global results are general estimates only and are based on the accuracy and completeness of the data collected, with the level of accuracy varying from one company to another. In particular, some data for sales figures, number of stores or total sales surfaces are only estimates carried out subsequently and are only illustrative.

The data generated by this tool does not create a legal or contractual obligation for HIMA or EDRA/GHIN. HIMA and EDRA/GHIN accept no responsibility for any errors, omissions or misleading statements in this report and no responsibility is accepted as to the standing of any company, or individual mentioned.

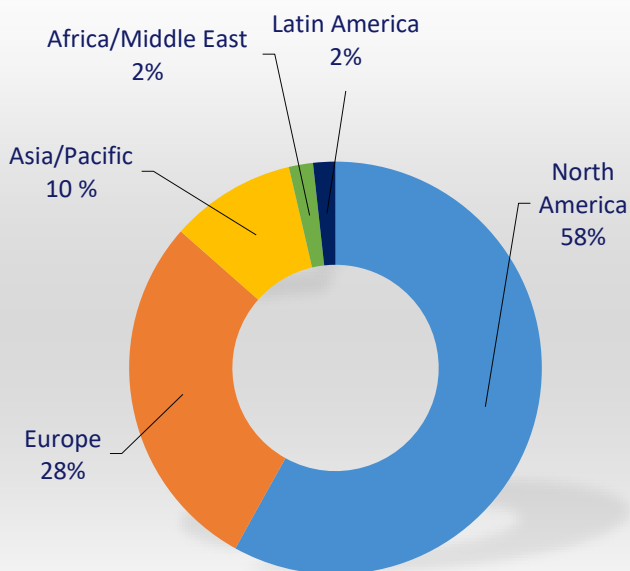
Section 1

Global analysis

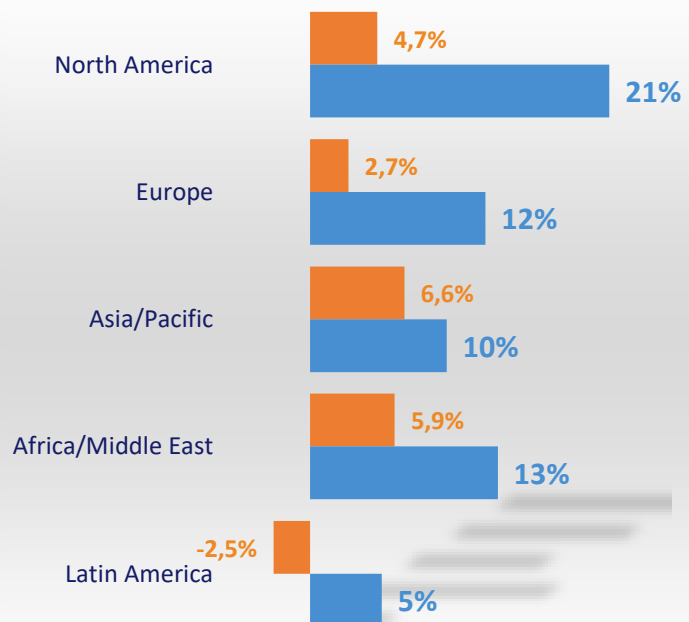
Global overview



2019 DIY sales, €



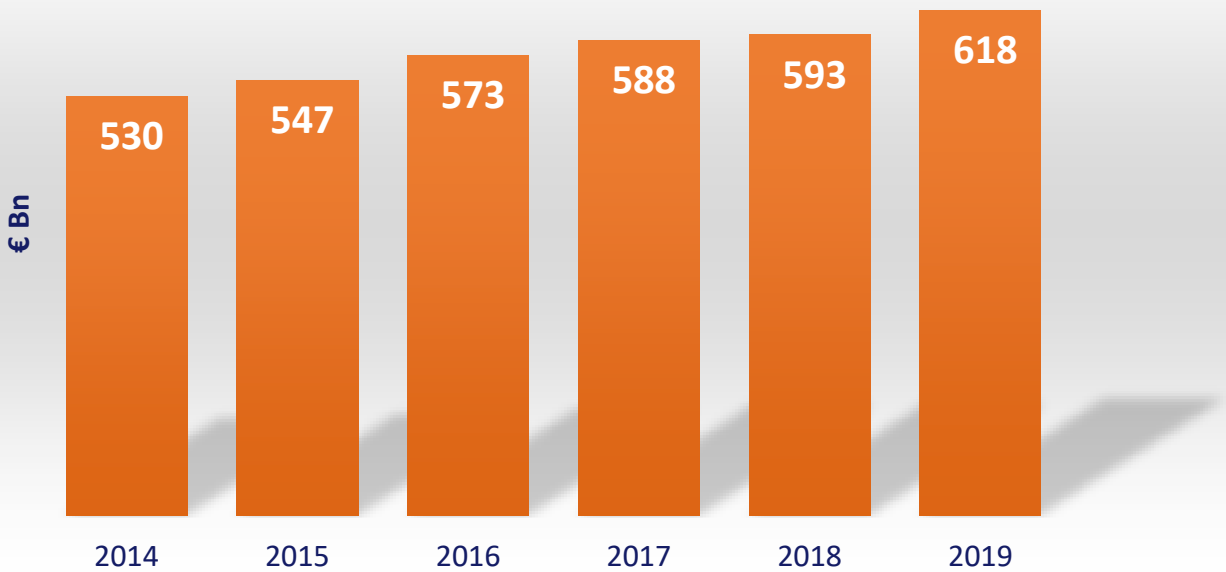
Market size evolution



■ 2018-2019 ■ 2014-2019

Global DIY overview

Global DIY market evolution



- 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

