

# DIY RETAILING – GERMANY – 2023

Inspire Germans' 'improve not move' mentality with store-branded products, DIY communities, personalised project guidance and online performance upgrades.



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Research Analyst



# DIY Retailing - Germany - 2023

## This report looks at the following areas:

- The performance of the DIY market, the effects of the recent pandemic and the rising cost of living
- Which DIY retailing products are being purchased and who is buying them
- Channels and retailers used to buy DIY products: split between specialists and non-specialists
- Understanding and establishing purchase drivers for DIY retailing
- Analysing attitudes and behaviours towards the purchase of DIY products
- Innovations in DIY retailing and products, including the use of new technology, sustainable products and how retailers can provide an omnichannel experience



Inspire Germans' 'improve not move' mentality with store-branded products, DIY communities, personalised project guidance and online performance upgrades.

## Overview

In a challenging economy, the number of Germans who **prioritise spending on their homes over other areas** increased to **50%** in 2023, compared to **42%** in 2022. Germans have adopted an **'improve not move' mentality** by engaging in projects that help them save money on their homes in the long run.

Low prices are a crucial factor for DIY shoppers (**50%**), which can be difficult to align with their interest in product quality (**48%**). With the rising importance of own-label products, DIY retailers can **invest in their store-branded DIY product ranges** to cater to a wider range of

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consumers, create positive brand associations and counter the threat of discounters' own-label DIY products.

The DIY market faces challenges from an increasingly fragmented market as non-specialists improve their range of products. For example, Lidl has been heavily promoting its [Parkside](#) range of tools which are now available at Kaufland as well as via [Otto.de](#).

DIY retailers have an opportunity to create a sense of **community through joint activities**, workshops or events. Such initiatives bring consumers together, create personal relationships and **provide newbies with guidance to enter the DIY world**, as younger consumers in particular agree that retailers are overwhelming to shop at.

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# Report Content



## EXECUTIVE SUMMARY

### Key issues covered in this Report

- Overview
- The five year outlook for the DIY retail market

### Market context

- Inflation is slowing but the cost of living remains high and will impact consumption in 2023
  - Graph 1: monthly harmonised consumer price index, by category, 2021-23
- Two thirds of Germans buy DIY products in-store
- Consumer spending continues to grow
  - Graph 2: consumer spending on DIY-related product categories, 2018-22
- Specialists' sales come under pressure from tighter budgets

### Mintel predicts

- Offering a strong omnichannel experience will remain key
- Market size & forecast
- DIY retail sales to see slow but steady growth despite the higher cost of living
- An ageing population and high inflation will challenge retailers to engage with senior buyers

### Opportunities

- Guide consumers in saving money and energy
  - Graph 3: behaviour towards saving money in DIY/home improvement projects, 2023
- Highlight the value and quality of store brands
- Create a sense of community – and friendship – through workshops
  - Graph 4: attitudes towards DIY/home improvement projects, 2023
- Supplement in-store benefits with the online channel
  - Graph 5: retailers used to buy DIY/home improvement products in the past 12 months, 2023
- DIY specialists to become more accessible for urban shoppers
- Engage women and senior shoppers to expand appeal
- Embrace young generations' environmental and online affinities
- Introduce women to DIY through small-scale projects

### The competitive landscape

- OBI and Bauhaus lead the German DIY market
  - Graph 6: DIY specialists' share of total DIY retail sales, 2022
- More men shop at specialists for DIY products, while women favour furniture stores

- Graph 7: retailers used to shop for DIY products, by gender, 2023
- Leading DIY specialist retailers
- Overview of the leading specialists in Germany

## MARKET DRIVERS

### The German economy

- Stagnation follows a technical recession
  - Graph 8: key economic data, in real terms, 2019-24
- Continuously high inflation shapes consumers, brands and the economy...
- ...impacting financial wellbeing...
- ...confidence and consumer expenditure
- Under the pressure of high inflation, Germans bought less in 2022
  - Graph 9: retail sales (€bn incl VAT), 2016-23
- Men are slightly more confident than women in their financial situation
  - Graph 10: how consumers describe their current financial situation, by gender, 2023
- Bad spring weather throws a spanner into the works of DIY retailers
  - Graph 11: consumers' past and planned spending on the home, 2022 and 2023

### Housing in Germany

- Rising tenancy means retailers must cater to both homeowners and tenants
  - Graph 12: tenure types, owners vs tenants, 2014-22
- Tenants offer opportunities but require different targeting
- 'Improve not move' mindset increases in 2023

### Demographics

- The ageing population will challenge retailers to engage more with seniors
  - Graph 13: population forecast and age-group breakdown, 2021-40
- Mature shoppers are more likely to be homeowners

### eCommerce

- Online remains pivotal despite drop in sales in 2022
  - Graph 14: frequency of online shopping, 2023
- Peer-to-peer marketplaces for lower-price bargains

## MARKET ACTIVITY

### Sector size and forecast

- Even with the rising cost of living, DIY sales rose 9% in 2022
  - Graph 15: DIY retail sales (excl VAT), 2013-23

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- DIY retail is forecast to resume an upward trend from 2024
- A return to slow-but-steady growth

## Consumer spending

- Consumer spending in the DIY sector
- Growth in spending on DIY-related categories
- Share of spending on DIY falls back to pre-pandemic levels
- Consumer spending on DIY categories expected to drop in 2023
  - Graph 16: breakdown of consumer spending on DIY categories (incl VAT), by category, 2018-22
- Pandemic-powered categories falter in 2022

## DIY online sales

- Online sales slow, but remain above pre-pandemic levels
  - Graph 17: online retail sales of DIY products, 2014-22
- Share of DIY spending online falls in 2022

## WHAT CONSUMERS WANT AND WHY

### Retailers used for DIY retailing shopping

- OBI remains Germany's top DIY retailer
  - Graph 18: retailer where DIY/home improvement products were purchased in the past 12 months, 2023
- Whilst declining, OBI's popularity kept it in the top spot in 2023
  - Graph 19: top five retailers where DIY/home improvement products were purchased in the past 12 months, 2021-23
- Promote (online) DIY to younger generations
- Enhance female interest in DIY retailers...
  - Graph 20: retailers where DIY/home improvement products were purchased in the past 12 months , 2023
- ...by creating female-friendly DIY store experiences
- Reignite the fun of DIY for older generations
- Specialists are the go-to retailers for homeowners

### DIY projects carried out

- Minor makeovers lead project engagement rate
  - Graph 21: home improvement projects carried out at home in the last 12 months, 2023
- Attract female consumers with minor interior alterations
- Promote garden work to cultivate wellbeing
- Provide expert guidance in challenging projects
- Inspire male project engagers to action

### Factors influencing choice of DIY store

- Germans place importance on product quality

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- Graph 22: reasons for choosing a retailer to buy DIY/home improvement products from, 2023
- Offer variety to combine affordability and quality
- Create fast delivery options for online DIY shoppers
- Re-invent store-branded DIY products
- Gen Z values ethical and low-priced products

## DIY retailing behaviour in the cost of living crisis

- Concerns over price rises lead to long-term investment interest
  - Graph 23: behaviour towards DIY/home improvement projects, 2023
- Tap into a desire for self-reliance
- Entice shoppers to buy now with special offers and inspiration
- Guiding newly moved Germans in their first steps
- Germans invest in their homes now to save money later

## Attitudes towards DIY retailing

- Attitudes towards DIY projects
  - Graph 24: attitudes towards DIY/home improvement projects, 2023
- Support procrastinators in starting DIY projects
- Bridging online presence with in-store benefits
- Make DIY even more fun by creating communities
- Concerns over the environment make Germans want to save resources

## RETAILER ACTIVITY

### Leading retailers

- The leading DIY specialists increased sales in 2022
- Leading DIY retailers, by sales

### Market share

- The specialist DIY retail market is dominated by a handful of larger players
  - Graph 25: leading specialists' share of total DIY retail sales, 2022
- DIY players are all making moves to expand
- Bauhaus catches up with market leader OBI
- toom Baumarkt and Hellweg cooperate for joint venture plans
- Hornbach becomes more energy efficient...
- ...and also Globus Baumarkt succeeds in energy optimisation

### Retail innovation

- Bauhaus opens DIY convenience stores
- Hornbach simplifies its shopping experience with drive-through collection halls

- Lidl pushes its Parkside own-label brand
- OBI rents out solar panels
- Specialists display green authenticity
- OBI follows competitors with van rental service

### **Advertising and marketing activity**

- OBI combines online inspiration with in-store displays...
- ...and supports consumers in saving energy
- toom Baumarkt shows how important the first step can be...
- ...while Hornbach shows the power of nature
- OBI launches teasers for celebrity-infused show 'Wunsch Projekt'...
- ...while also making use of YouTube Shorts for project guidance

## **APPENDIX**

### **Appendix – products covered, abbreviations and consumer research methodology and language usage**

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

### **Appendix – market size and forecast**

- Forecast methodology
- Market size – value
- Market forecast and prediction intervals – value
- Mintel's consumer spending market size



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