


The World of Home Improvement



By John W. Herbert, General Secretary
European DIY Retail Association – EDRA
Global Home Improvement Network – ghin

EDRA – European DIY Retail Association



- ◆ Founded in 2002 by FMB and BHB
- ◆ Global Home Improvement Network, GHIN, founded in 2010
- ◆ Became an independent association on 2nd December 2009
- ◆ Built on 3 pillars:

Networking

- Contact to home centres worldwide
- Store visits
- Intern. buying groups
- Study tours
- Home/Garden Centre Conferences

Communication

- Annual General Meeting
- European DIY Panel
- Project Group Meetings
- EDRA Newsletter
- EDRA Website

Lobbying

- Representation in Brussels
- Member of EuroCommerce
- Lobbying on legislation: Environment / CSR

Global Home Improvement Network

- Became independent Association in London, 10th June 2015
- 119 members worldwide
- Operating in 102 countries with over 23.000 stores
- Members sales exceed \$255bln



GHIN Members 2017



ASSOCIATIONS

BHB Handelsverband
Heimwerken · Bauen · Garten

AFS **baumarkt** **BAUVISTA**
BayWa Bau & Garten **coop** **bau-hobby** **EURO-BAUSTOFFE**
EURO-DIY **Augsburg** **MULTIMATE**
hagebau **hubo** **DGN retail** **HELLWEG**
Hammer **Kremer**
HORNBAACH **KNAUER** **JUMBO**
Landi **DO IT - GARDEN** **MIGROS** **Pflanzen KÖLLE** **toom!**
OBI

fmb FMB - Fédération des
Magasins de Bricolage
France

LE BHV / MARAIS **BRICOMAN**
BRICO CASH **BRICO DEPOT** **COFAQ**
castorama
LEROY MERLIN **BRICO PRO** **L'ENTREPOT DU BRICOLAGE**
BRICOMARCHE
Les Briconautes **Mr. Bricolage**
Weldom

adfb Asociación de
Distribuidores de
Ferretería y Bricolaje
Spain

AKI **AFB** **BriCor**
brico **BRICOKING** **BRICORAMA**

ASSOFERMET
Assofermet
Italy
The Assofermet wholesalers' sales to small retailers
represent almost 80% of the total hardware market in Italy

comeos comeos
Belgium

AVEVE **BELSACK** **bol.com** **BRICO**
carpetright **Hubo** **Mr. Bricolage**
ganna **CREA** **COLRUYT GROUP** **cool blue** **cora** **Oh! green**
DEL'NET-ZELF **familflora** **freetime** **HOBBYCENTER** **BRIC PLAN-IT** **PRODIY**
Eurotuin.be **FLORALUX** **HORTA** **GROUP** **MENO**
VAN DEN NEST **makro** **IKEA** **safti**
PELCKMANS **Walter Van Gaster** **UNIGRO** **VANHIE** **UNIGRO** **Verstock**

RASI RaSi Ry - Finnish
Hardware Association
Finland

CARLSON **HARTMAN** **Hankkija**
STARK **NETRAUTA.FI**
LAATTA PISTE **K** **mestarit**
SOK
taloon.com **Värimieh Oy**

MEMBERS

ATTARD BROS **Bayцентр**
BUNNINGS **easy** **builders**
Cashbuild **ConstruMart**
CAINZ **DOMINGO**
DCM **HOMEBASE**
Домовой **ЕЦЕНТР**
JOYFUL HONDA
KOHNAN
KOMERI **LÖVENSKIÖLD**
LOWE'S **MAESTRO**
MERKUR **MITRE 10**
OBI **Praktiker**
ПЕРВОМАСТЕР **ПРАКТИС**
ПЕТРОВИЧ **PROMART**
SILVAN **СТАРТ**
SODIMAC **TEKZEN**
TEST RITE **Topline**
Wickes **Woodie's**

Bricoalliance
BYGGmax **BYKO** **Hubo**
ERMITAŽAS **UNITED HARDWARE** **Utility**

BricoLife
Brico Point **GAIZAROLI** **BRICO sapiens**
Free time **HOBBS LEGNO**
EuroBRICO **ZZI**
ORIZONTE **BRICOPIU**

K
K Rauta **CSSS**
BM **KSENUKAI**
BYGGMAKKER

Kingsher
BaQ **BRICO DEPOT**
castorama **SCREWFIX**

maxeda
DIY Group
BRICO **praxis**
Formido

GHIN Board Members 2017



**Sergio
Giroldi**

OBI AG
Germany



Véronique Laury
Kingfisher plc. / UK



John Gillam
Bunnings / Australia
(GHIN board)



Kai Kächelein
Hagebau / Germany



Enrique Gundermann
Sodimac / Chile
(GHIN board)



Terho Kalliokoski
Kesko / Finland



Werner de Jager
Cashbuild / South Africa
(GHIN board)



Pascal Malfoy
FMB-Adeo / France



Richard D. Maltsbarger
Lowe's / USA
(GHIN board)



Carl Otto Løvenskiold
Løvenskiold-Væketo AS / Norway



Hiromasa Tsuchiya
Cainz / Japan
(GHIN board)



Erwin Van Osta
Bricoalliance - Hubo / Belgium



Murat Gigin
Tekzen / Turkey

GHIN Members: Network

- Global DIY Summit – *Barcelona 2018*
- Annual General Meeting – *Barcelona 2018*
- VIP entry to major global garden and home improvement Trade Fairs
- Up-to-date annual information about global DIY retailing
- Study tours and company visits

6th Global DIY Summit 2018

The networking event for the Home Improvement Industry

Barcelona 12-14 June 2018
Store Tour & Get-Together 12 June



World's leading networking
in DIY industry

900+ delegates & top executives

Gala dinner
& DIY Lifetime Award
13 June 2018



Global DIY Congress:

- 1020+ delegates & top executives
- World's leading networking event in our industry
- Presentations from industry leaders
- Workshops & discussion groups
- International VIP Cocktail Party
- Gala dinner & DIY Lifetime Award
- Exhibition area
- Local store tour

Home Improvement World Market 2016

A 3D rendering of the Earth is centered in the image. It shows the continents of North and South America on the left, and Europe and Africa on the right. The globe is surrounded by a soft white glow.

€424.9 billion

Source: fediyima

Trends



Retail Revolution:
Changing the face of retailing.

MULTI-CHANNEL



Trends in Europe - Multichannel

Online sales • Click and Collect • In-store terminals • Apps for mobile devices

Stores meet their customers on social media



**Internet sales in Europe
today are about 12%...**

Tomorrow ?

25% ?

30% ?

35% ?



Amazon is expected to be
the world's Nr. 1 Retailer
in the next 10 years.



Amazon sales



- ✓ Sales 2016 over \$136 Billion
- ✓ Sales increase on 2015 +27%
- ✓ Customer base 304 Million accounts

6 Major Changes in Retailing Tomorrow:



Less Selling Space



Smaller Stores

Emotion...

Make entertainment shoppable!



- Strong Brands become stronger
- Own Label Brands become stronger

In the future there will be no alternatives



Supplier Brands



BOSCH



KÄRCHER



**BLACK &
DECKER®**

Social Media



Home Hardware,
Building Centre &
Furniture Stores ✓
@homehardwarestores

- Home
- About
- Videos
- Flyer/Circulaire
- Sign Up for Email/ Inscri...
- Photos
- Posts**
- Locations
- Community



👍 Like 📡 Follow ➦ Share ⋮

Send Message

✍️ Status 📷 Photo/Video 🌐

👤 Write something on this Page...

 **Home Hardware, Building Centre & Furniture Stores** 🌐 ⋮
June 26 · 🌐

From the little projects to the big ones, we'll show you how to get it done. Because do it yourself doesn't mean do it alone.
<http://www.homehardware.ca/en/index/store-locator.htm>



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November 3 at 9:14pm 🌐
Do you have rangehoods
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Like · Comment

 **Nancy Anderson** ⋮
November 3 at 8:02pm 🌐

Mobile Shopping

Mobile Payments



Trends in Europe

Sustainability “One World”

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

On these issues a company must communicate exactly what it is doing for the community.



Trends in Europe

Less is more – move to better quality products



Trends in Europe

do it for me



Trends in Europe

Product innovation and design



People



Thank you !

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