



## Press release

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### DIY sector ends "corona half-year" with positive results

- Noticeable upward trend following slowdown caused by store closures
- Shoppers value consistency and high safety standards in DIY stores
- Industry demonstrates its systemic relevance during shutdown phase

DIY stores and garden centres in Germany have coped well with the first phase of the corona crisis since March. German retailers in the DIY and gardening sector posted sales of EUR 11.82 billion in the first half of the year, corresponding to an increase of 15.6 percent. DIY retailers in Austria (EUR 1.49 billion, +8.3 percent) and Switzerland (CHF 1.82 billion, +3.5 percent) also performed very well in the crisis despite long store closures in some cases. However, the coming months will show whether the positive trend continues as the situation progressively returns to normal.

The first phase of the pandemic presented a major challenge for DIY stores and garden centres. Initially, there were state-imposed closures of around one-quarter of all DIY stores and garden centres in Germany (even almost all stores in Austria and Switzerland for many weeks), however, the scenario changed rapidly. Local, regional and national authorities across the country, with whom the BHB trade association for home improvement, building and gardening maintains a constant dialogue, have recognised the systemic relevance of the industry and supported this by issuing opening permits.

This was absolutely crucial for the companies of the industry (retail and production) even though the rules, which were implemented remarkably quickly and at an early stage in the industry, posed personnel and financial challenges.

One reason for the special opening was the **broad and deep range of products** offered by DIY retailers, which covered many system-relevant services. DIY retailers in Germany, Austria and Switzerland stock well over 350,000 products, which are either directly available or can be obtained online at short notice. Customers have made extensive use of this retail capacity during the corona phase, as can be seen by the sales and product range development. In addition to all "green" product ranges (living greenery as well as garden equipment and furniture), all items from the areas of construction and renovation performed very well. People are also spending time and resources on renovation and beautification (in Germany, paint/painting accessories increased by around 38 percent in the first half of the year).

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One of the greatest challenges that retailers faced in the first phase of corona was **supply chain logistics**. The import routes from Asia in particular, some of which were blocked for long periods, as well as the border barriers, made the flow of goods to retail locations difficult. Retail logistics experts, and particularly suppliers, have more than fulfilled their supply mandate.

### **Industry looks optimistically to the future despite uncertain development**

However, the current good sales situation does not automatically foretell the annual result. In addition to the unpredictable development, the constant risk of a new lockdown, the continued need for expensive safety measures, pull-forward effects also come into play: customers have already completed many renovation, beautification and expansion projects in their homes. These effects cannot be easily repeated and make planning for 2021 difficult.

Nevertheless, the board and management of BHB are looking to the future with optimism. A representative survey by ServiceBarometer AG reported an upbeat outlook for the industry – this indicates that it is on a very positive path with regard to its continuous change process, emphasised BHB board spokesperson Peter Tapaß and managing director Dr Peter Wüst.

The most important key facts from the survey:

- 81% of respondents have shopped at a DIY store or garden centre in the last six months. This unprecedented figure can be seen across all age groups, from 76% in those over 70 to 83% among 16 to 29 year olds.
- At over 58%, garden projects (including self-sufficiency with vegetables, fruits and herbs) were the most frequent purchasing reason. This was followed by renovation/modernisation/remodeling (35%) and beautification and decoration (also 35%) Another 23% went to stores for maintenance and repair products (in Germany, this figure would correspond to 18.7 million inhabitants).
- For 95% of survey respondents with planned DIY projects, DIY stores and garden centres are their preferred purchase channel. 35% of respondents rated industry retailers as "extremely important", 37% as "very important" and another 23% as "important" for their DIY projects.
- 65% of those surveyed want their products to be available immediately, while over 54% value the enormous product selection. Nearly every second customer (47%) seeks personal advice. Here as well, DIY stores and garden centres are the first choice.



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About Handelsverband Heimwerken, Bauen und Garten e.V. (BHB)

As a trade association, the BHB represents the interests of home improvement, building and gardening retail companies in Germany, Austria and Switzerland (DACH region) as well as other companies in the DIY industry from the manufacturing and service sectors. As an association with an international focus, BHB is active in Germany, German-speaking countries and all of Europe through its membership in the European DIY Retail Association (EDRA). It represents the economic and media policy interests of the industry and engages in dialogue with political institutions, the media, administration, suppliers and service providers. **The association comprises 19 trade organisations with 24 distribution channels and around 210 supporting members from industry and the service sector.** The industry has around 480,000 employees in Germany. Total gross sales of German DIY and home improvement stores reached around EUR 19.46 billion in 2019.