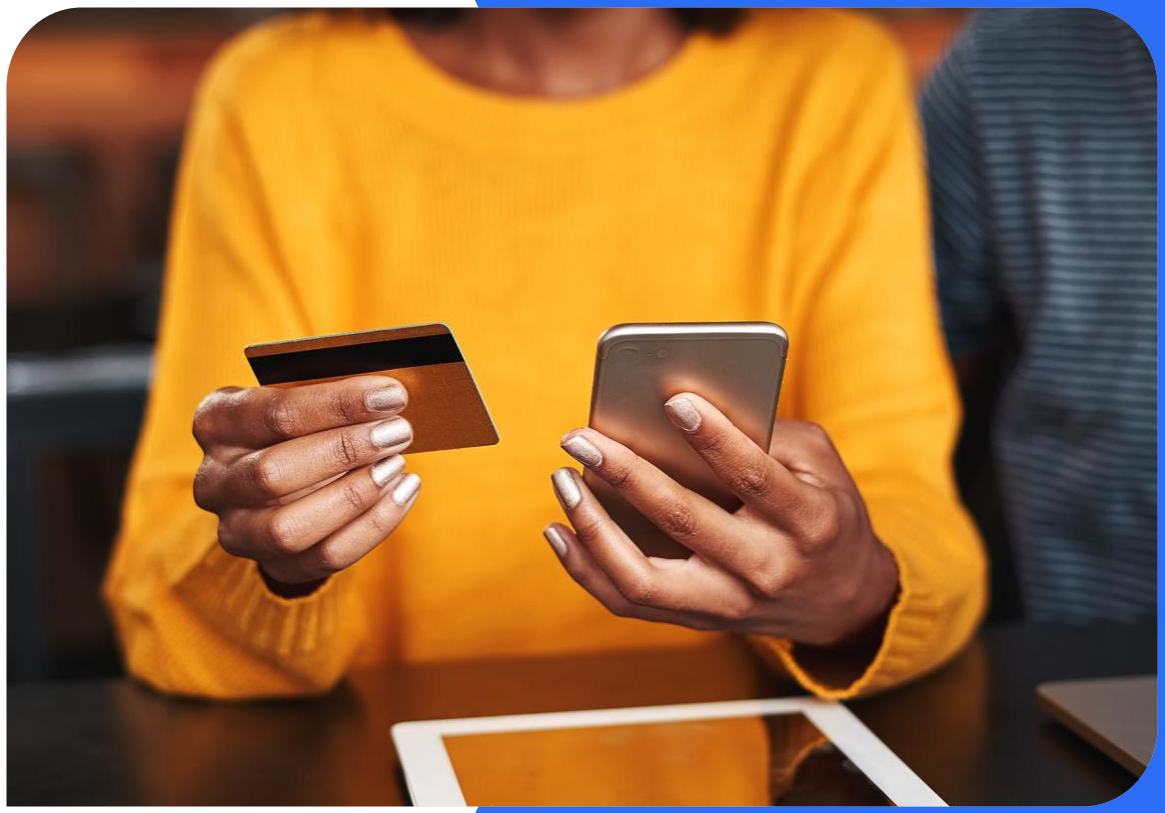
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DIY at the Tipping Point

The forces reshaping the market



Laura Gilson & Katy Bennett
Western Europe

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Five forces are pushing DIY past its tipping point

Growth hasn't disappeared. It is moving to new channels, new decision engines, new brands and new models

	FORCE	SIGNAL		WHAT IT MEANS
01	**Consumer sentiment & market dynamics**	**–0.7%**	Gardening & Home Improvement value, Europe, Jan–Sep 2026 (€25.4bn)	Price-led growth is over, yet shoppers still pay for clear benefits: robot mowers +81% since 2023
02	**Home improvement goes digital**	**40.6%**	of EU7 online home improvement value flows through marketplaces	Online outgrows total e-commerce in every market; the EU parcel duty cut Chinese platform orders 48% in Q3
03	**AI & social reshape discovery**	**8% → 18%**	of shoppers use AI search to research purchases, Q2 2025 to Q2 2026	AI-search users spend €325 per purchase vs €248 on average, a 31% premium
04	**Challenger brands & platforms at work**	**3.3% → 8.3%**	Chinese brands' value share, EU5 power tools, powered gardening & lighting, 2023–26	In robot mowers, Chinese brands went from 19% to 43% share in three years
05	**Sustainability: the circular shift**	**28%**	of shoppers bought second-hand instead of new in 2025 (26.5% in 2024)	Durability and quality now drive circular purchases more than price

The tipping point: The winners in 2027 will be the brands and retailers that earn every euro of a cautious consumer, wherever and however that consumer now decides.

Sources: NIQ Market Intelligence (Europe, Jan–Sep 2026); NIQ Digital Purchases (EU7 2026 YTD Oct; EU10 Q3 2026); NIQ newron Consumer; NIQ Consumer Life 2025

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02 Home improvement goes digital

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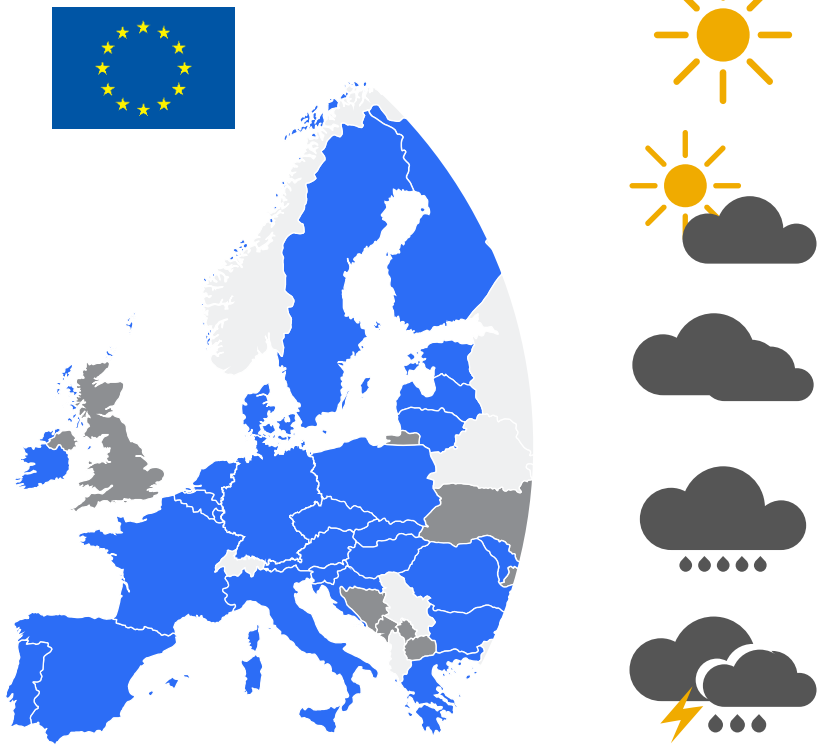
04 Challenger brands & platforms at work

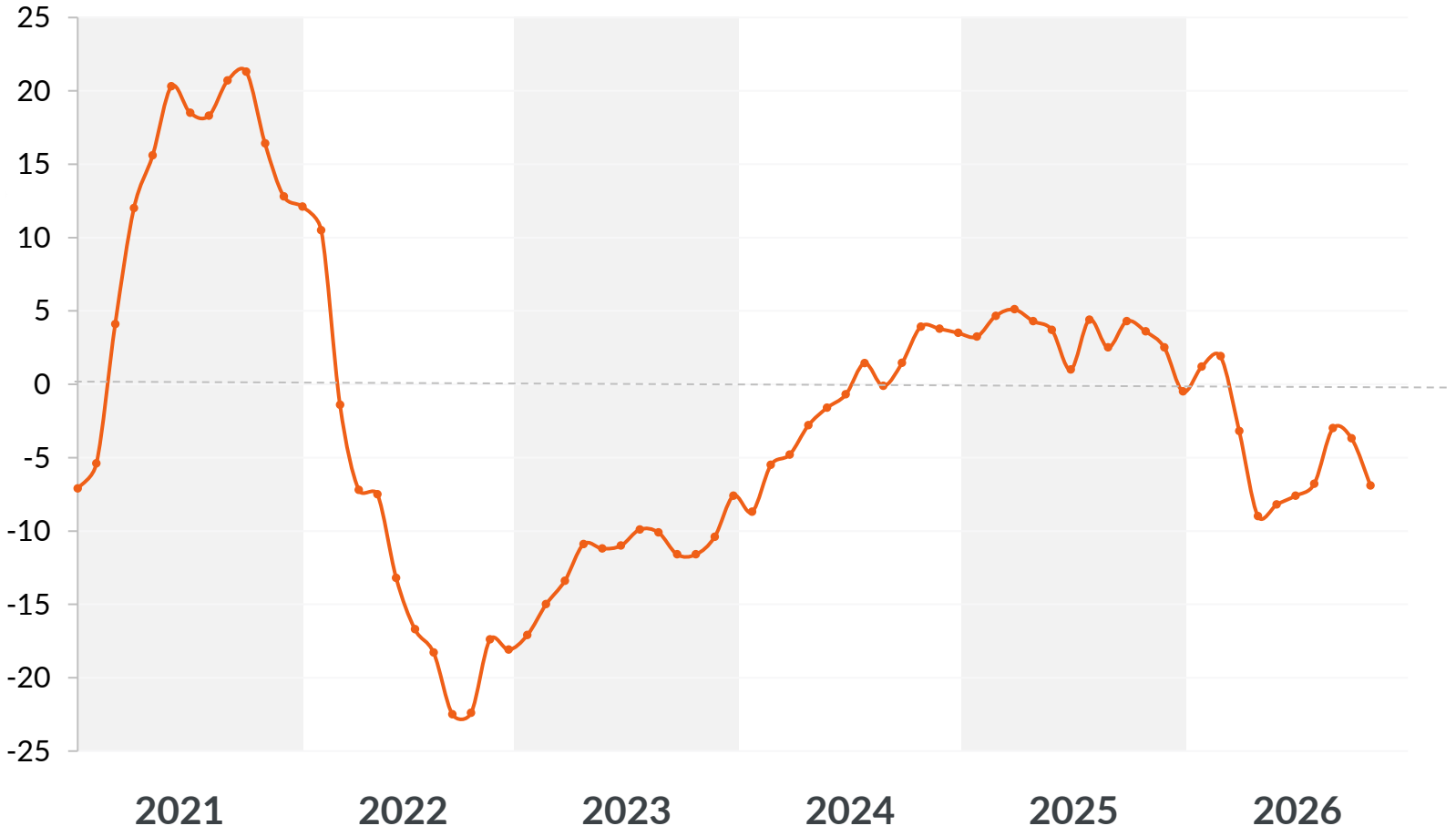
05 Sustainability: the circular shift

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Consumer confidence remains fragile across Europe

Even as inflation eases, uncertainty continues to weigh on discretionary spending.



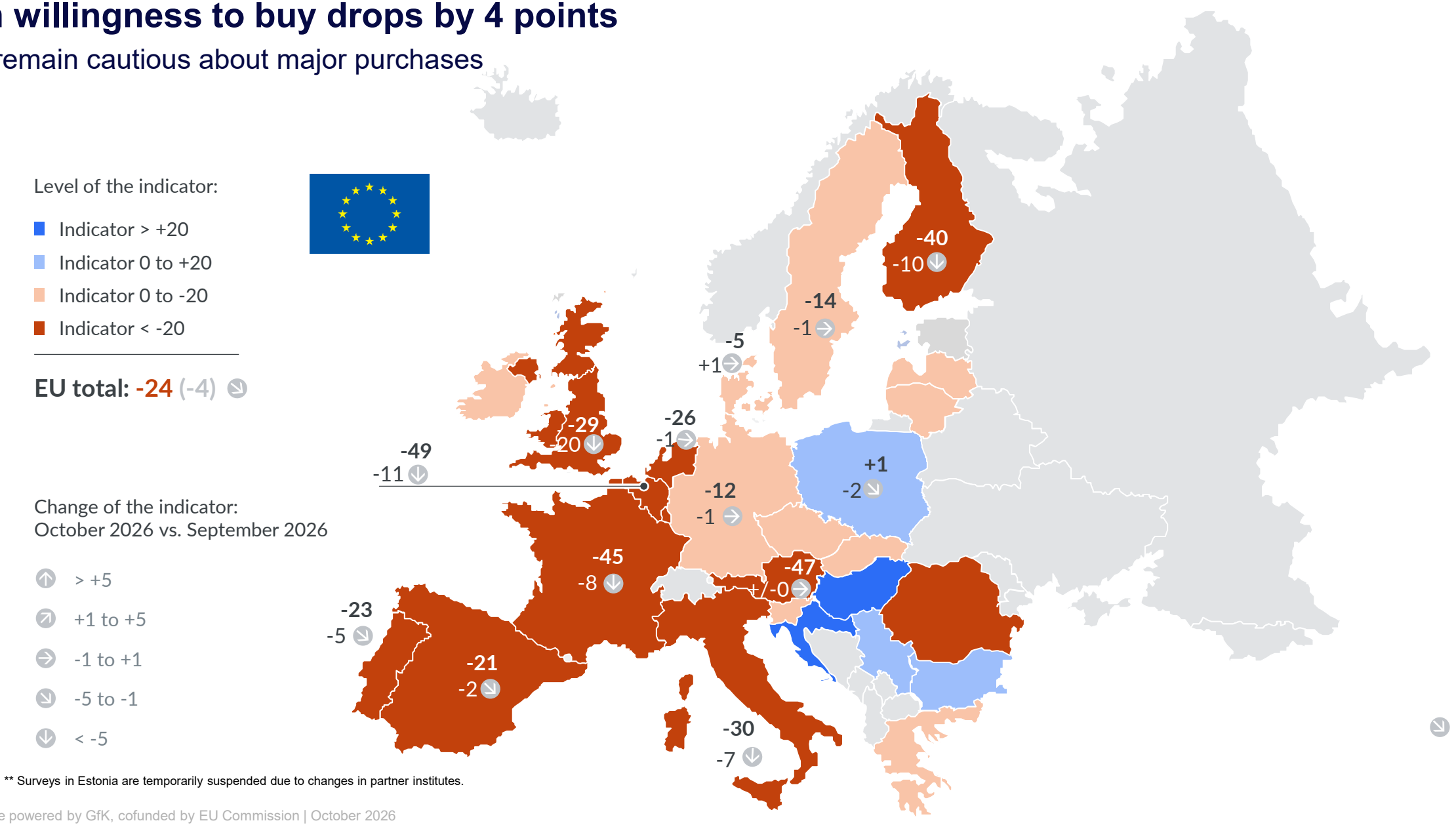


Source: NIM Euro Climate powered by GfK, cofunded by EU Commission | October 2026

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European willingness to buy drops by 4 points

Consumers remain cautious about major purchases



** Surveys in Estonia are temporarily suspended due to changes in partner institutes.

Source: NIM Euro Climate powered by GfK, cofunded by EU Commission | October 2026

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Gardening & Home Improvement: growth has normalized, not disappeared

€24.8 bn

Jan 26 – Sep 26

-1.2%
vs. Jan 25 – Sep 25

Europe | Gardening & Home Improvement | Sales Value EUR | Growth rate +/-% vs. previous year



Jan–Sep 2026 vs. 2021	
Value	+11.5%
Units	+1.0%
Price	+10.4%

Source: NIQ Market Intelligence, Europe, Retail Channels | Value and Price in EUR

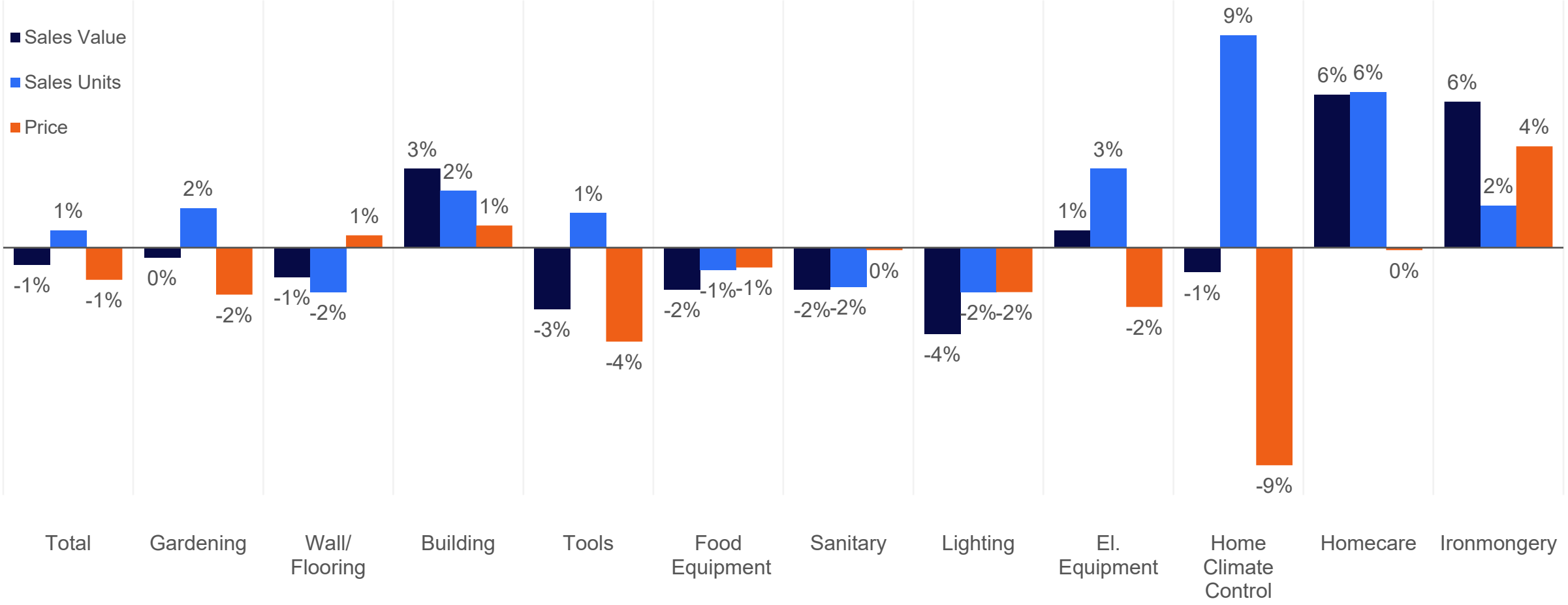
NIQ powered by GfK intelligence

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Consumers are prioritizing needs over nice-to-haves

Growth is increasingly concentrated in categories linked to maintenance, efficiency and essential projects.

Europe | Gardening & Home Improvement | Jan 26 – Sep 26 | Growth rate +/-% vs. previous year



Source: NIQ Market Intelligence, Europe, Retail Channels | Value and Price in EUR

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EU7 softens: The south grows while the 3 largest markets contract

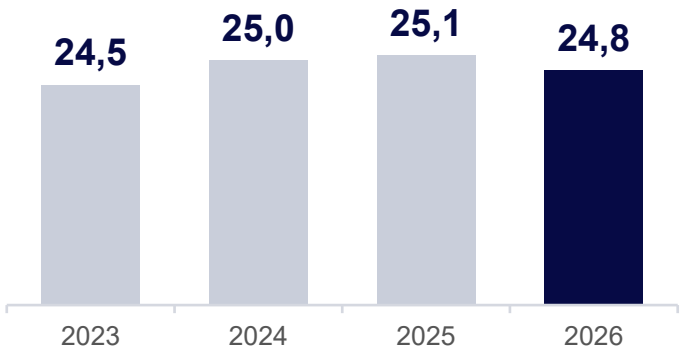
Spain, Italy and the Netherlands expand - Germany, the largest market, drives the decline

€24.8bn

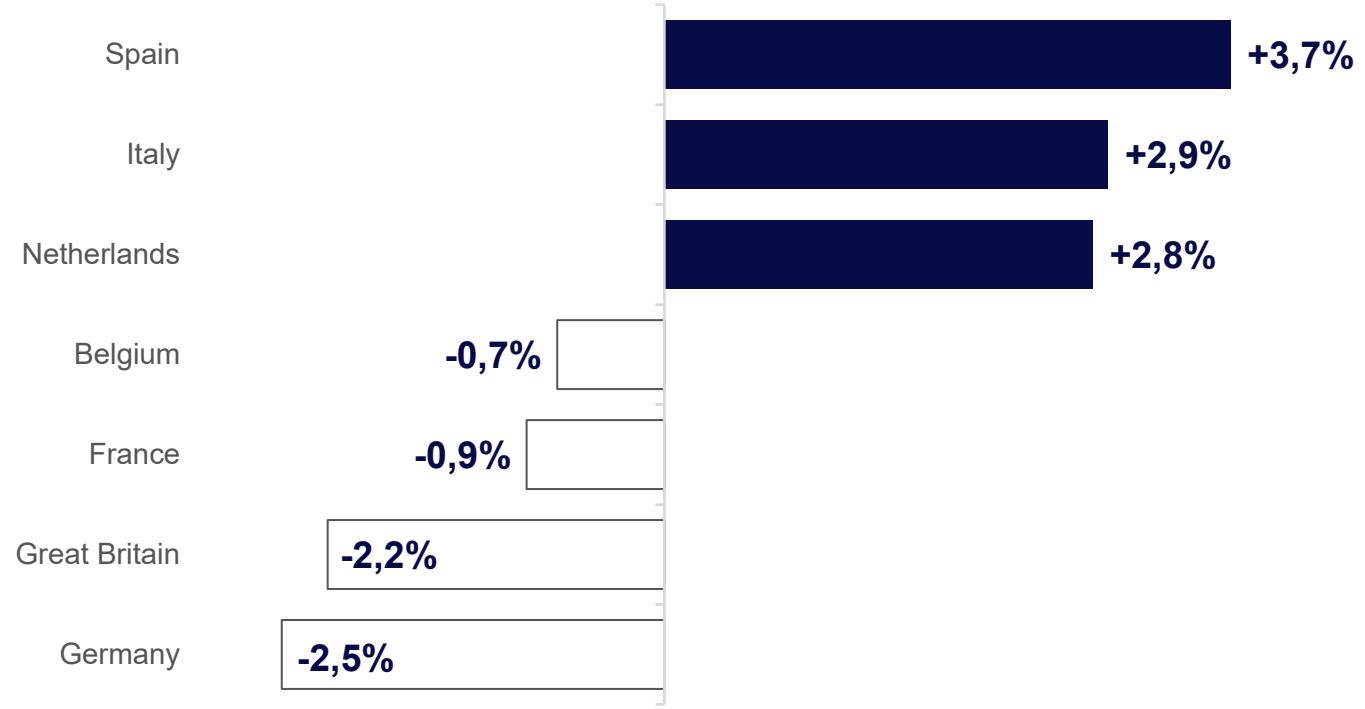
EU-7 market size, Jan–Sep 2026

−1.2% vs Jan–Sep 2025

Market trend, €bn (Jan–Sep)



Growth by country, Jan–Sep 2026 vs 2025 (value)



Market resets: EU-7 slips 1.2% after two years of growth, and Germany falls 2.5% to €8.2bn.

Source: NIQ Market Intelligence, Europe, Retail Channels | Panelmarket incl. wholesalers | Sales value EUR | EU-7 | Jan–Sep 2026 vs Jan–Sep 2025

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Gardening anchors the market while smaller categories outperform

Gardening holds 37% of EU7 value and is stable - the construction-led categories are under most pressure

€9.2bn

Gardening sales, EU-7, Jan–Sep 2026

37% of total market value

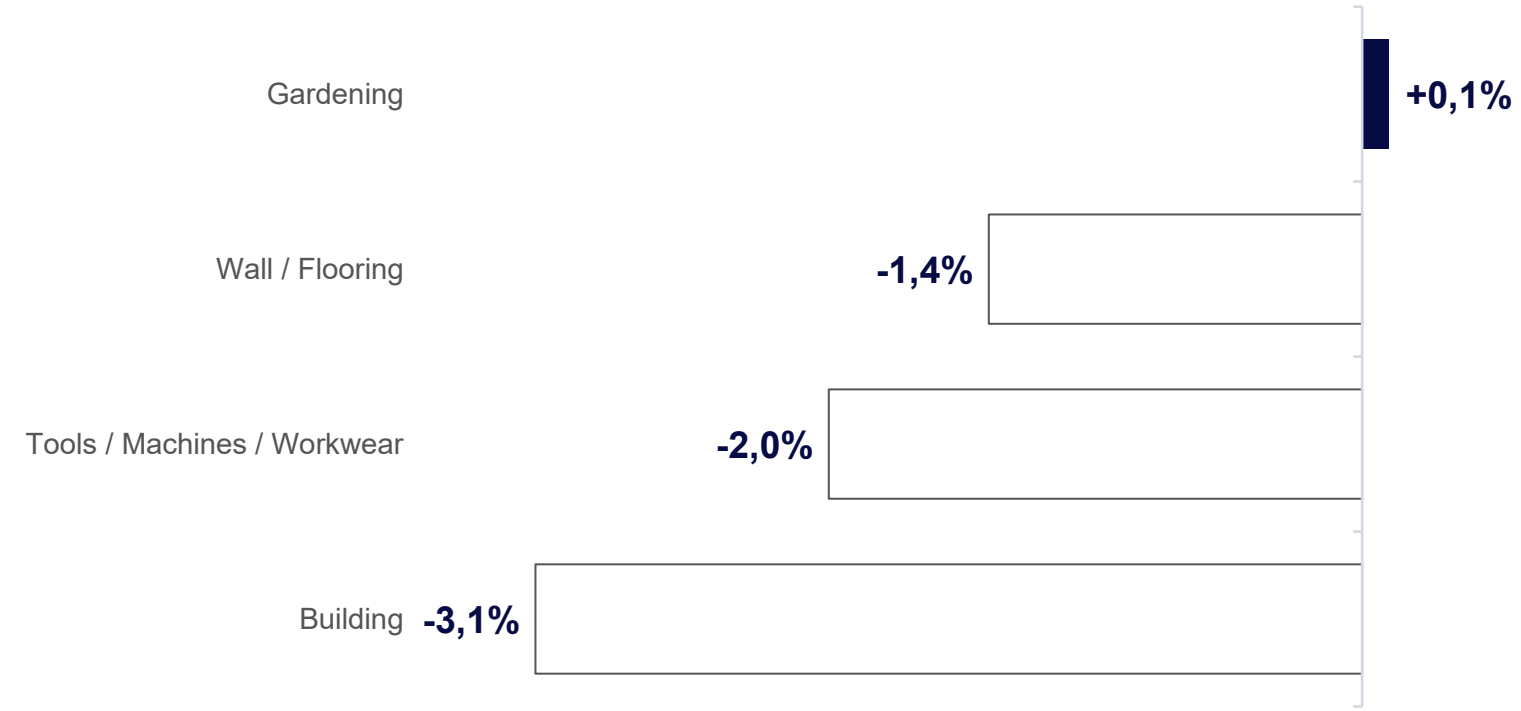
Small categories outperform

Ironmongery and Homecare lead growth, from a low base.

Protect the core

Gardening is resilient and remains the anchor of the market.

Signals from key categories, value growth Jan–Sep 2026 vs 2025



So what: defend the gardening core and back the niches that are growing, rather than chasing a shrinking construction base.

Source: NIQ Market Intelligence, Europe, Retail Channels | Panelmarket incl. wholesalers | Sales value EUR | EU-7 | Jan–Sep 2026 vs Jan–Sep 2025

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Value-conscious does not mean spending less

Across Gardening & Home Improvement, products that save time, improve outcomes, or align with consumer values are growing ahead of their categories.

EU7: Growth in Value Jan-Sep 2023 - 2026

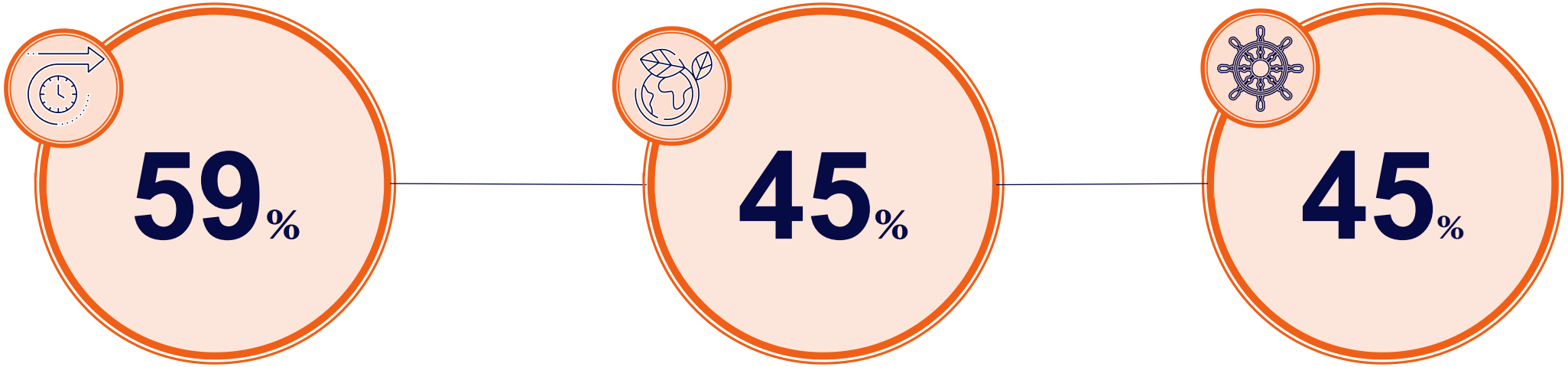


Source: NIQ Market Intelligence, Europe, Retail Channels | Value growth in EUR

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Value matters more than price

Consumers increasingly prioritize products that last longer, cost less to operate and are easier to use & repair.



Source: NIQ Consumer Tech & Durable Goods consumer survey 2026
Q: How important are each of the following to you when deciding which consumer electronics, home appliances, and technology products to buy? Top box (very important) Top 3 factors selected

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Gardening is embedded in everyday life

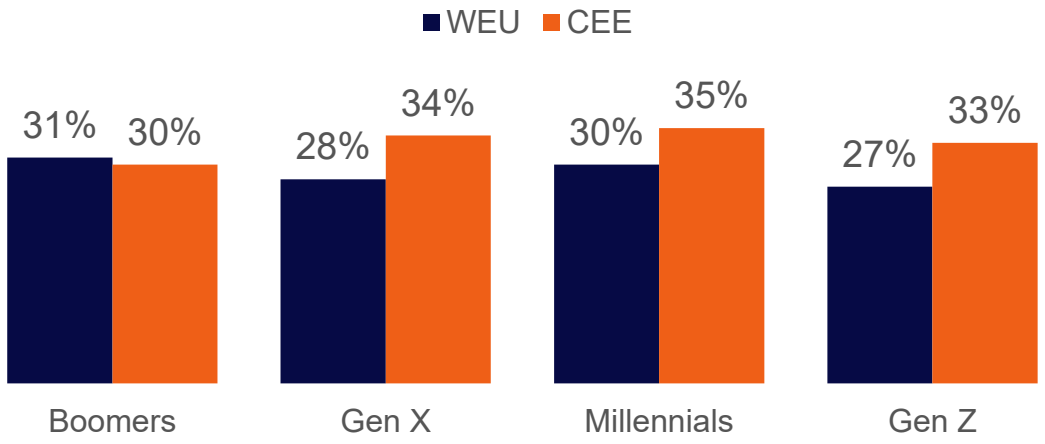
Around 1/3 of European consumers garden at least weekly.

% who garden or do yard work every day or most days, or at least once a week

29% WEU

33% CEE

By Generation

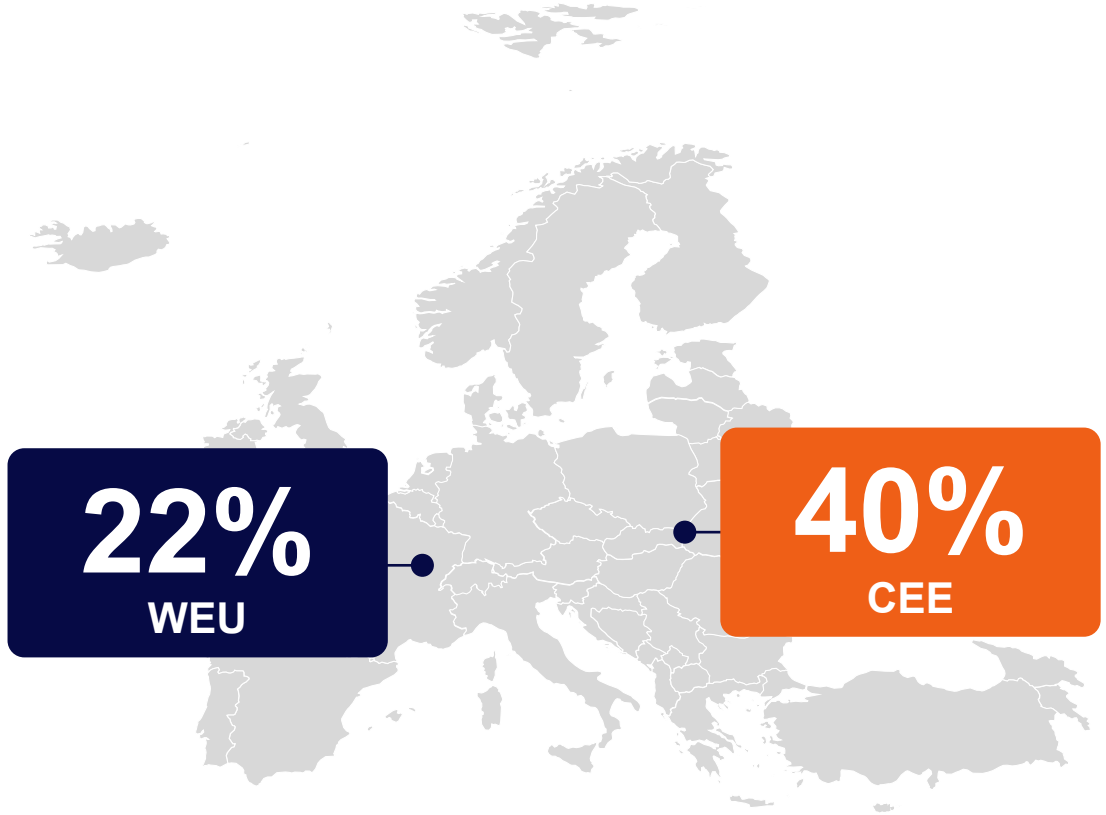


Source: NIQ consumer survey. Western Europe n=3,883; CEE n=2,206. Figures rounded; Q: B2v – How often: Gardening or yard work (W26, W22): "Every day or most days" + "At least once a week"



CEE is nearly twice as likely as Western Europe to plan a home renovation.

% planning to spend on home renovation in the next 12 months



Millennials are setting the pace

47%	39%	39%	32%
24%	23%	22%	18%
Millennials	**Gen X**	**Boomers**	**Gen Z**
Born 1980–97	Born 1965–79	Born 1946–64	Born 1998+

WEU | CEE

Source: NIQ consumer survey. Western Europe n=3,883 (Gen Z 768, Millennials 1,150, Gen X 1,023, Baby Boom 903); CEE n=2,206 (480, 834, 578, 311). Figures rounded. (± pts) = difference vs. regional average.
Q: K15 – Next 12 months planned spending on (W26): Home renovation. Born = birth years of the survey's generation definitions (Boomers = Baby Boom).

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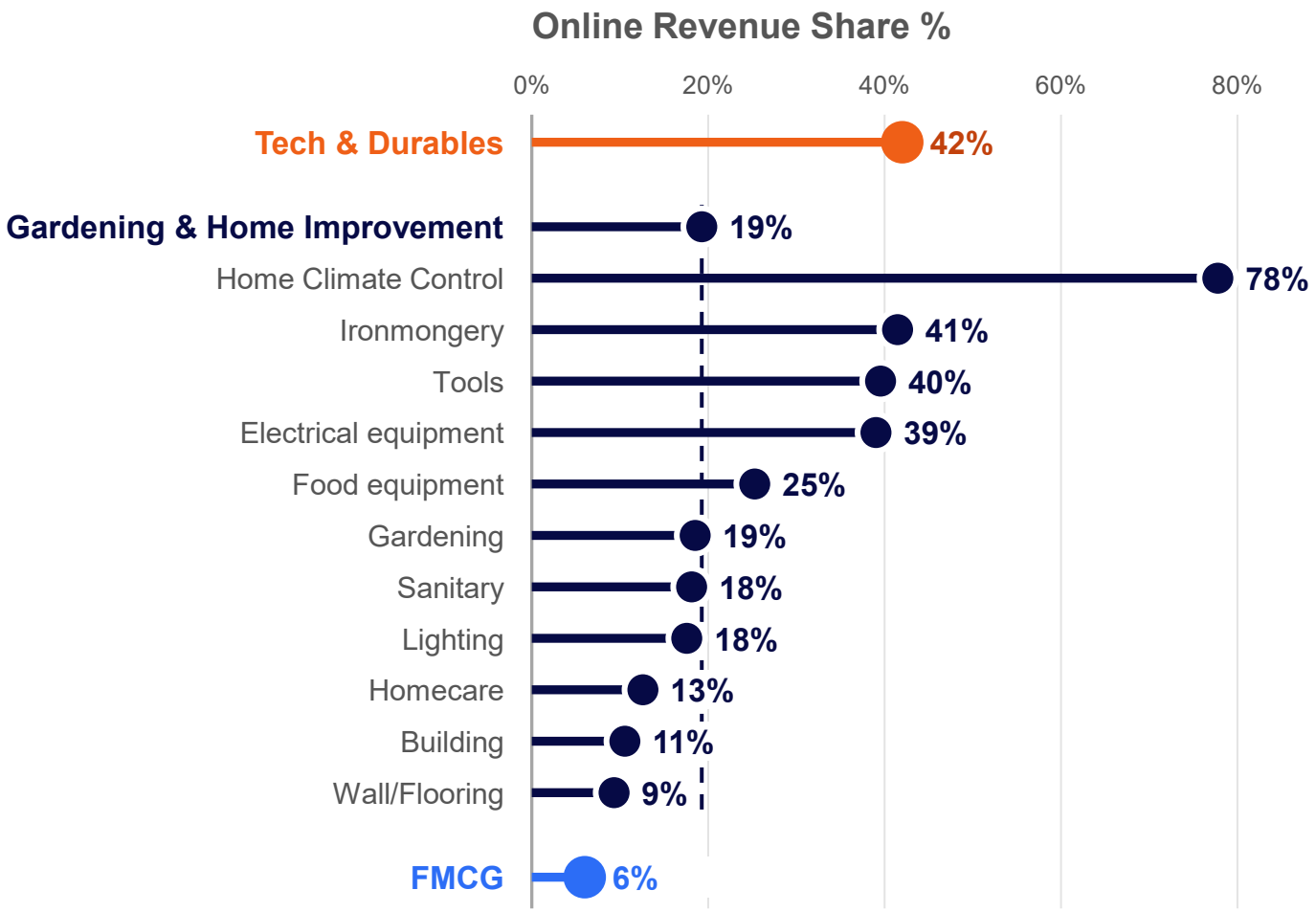
05 Sustainability: the circular shift

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Consumers are increasingly turning to digital channels

While overall online share remains below Tech & Durables, several Gardening & Home Improvement categories are already highly digitalized.



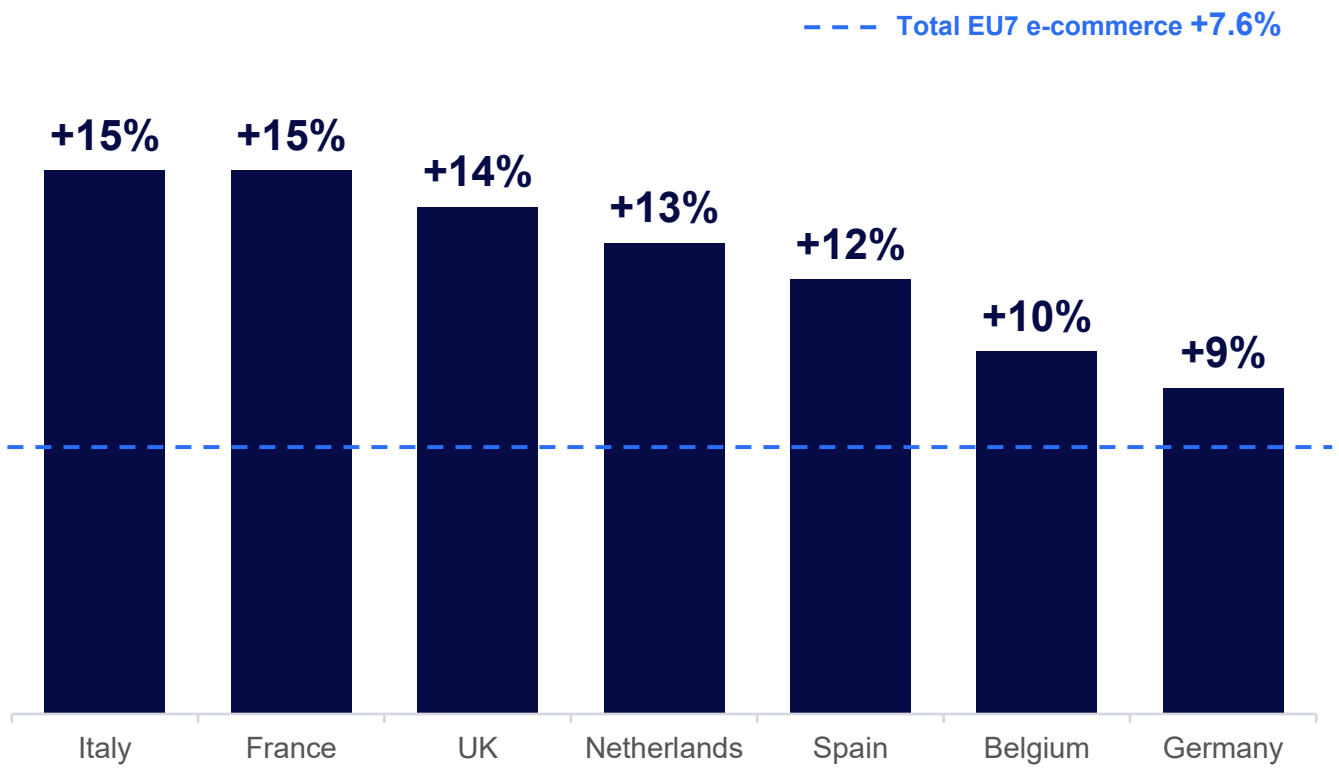
Source: NIQ Market Intelligence, Sales Tracking, retailer channel. T&D: internet sales % FMCG: median of 18 countries, Europe, Jan–Sep 2026.



Online home improvement is outgrowing total e-commerce in every EU7 market

Italy, France and the UK lead - Heating & cooling is the fastest-growing category online

Online home improvement value growth, 2026 YTD Oct vs YA



Fastest-growing categories online, EU7



+55% **Heating & cooling**
4.6% of online value



+27% **Gardening**
2.8% of online value



+21% **Storage & organisation**
3.6% of online value



+14% **Vacuums & floor care**
6.8% of online value

So what: online is now a growth channel in its own right for home improvement, not a side channel.

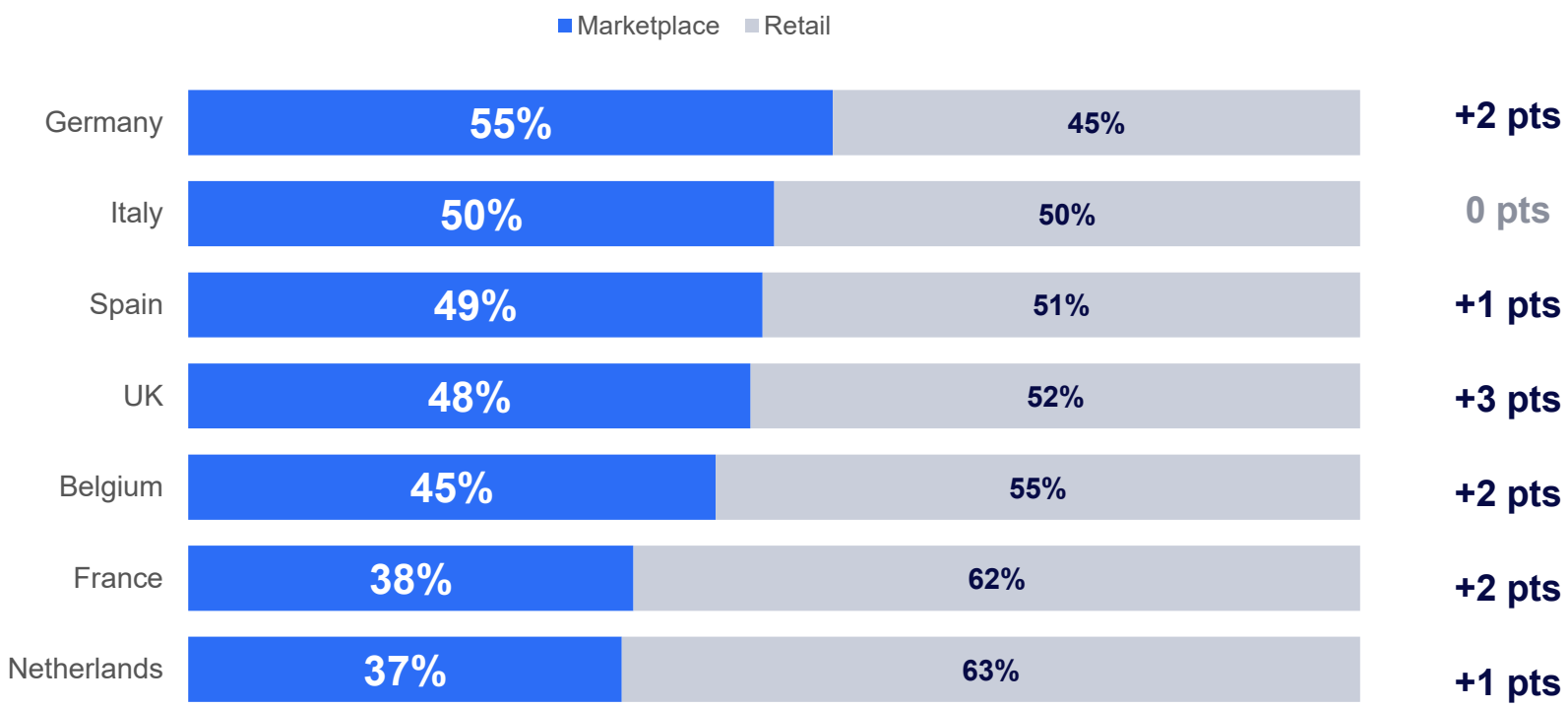
Source: NIQ Digital Purchases e-commerce consumer panel | Home improvement (DIY & tools, home & kitchen, lighting, garden) | Marketplace and retail | EU7 | 2026 YTD October vs YA

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Marketplaces are the main digital growth lever: 4 in every 10 euros and rising

Marketplace share grew in 6 of 7 markets - in Germany it is already above half

Marketplace vs retail share of online home improvement value, 2026 YTD Oct



vs YA

Germany	+2 pts
Italy	0 pts
Spain	+1 pts
UK	+3 pts
Belgium	+2 pts
France	+2 pts
Netherlands	+1 pts

40.6%

marketplace share of online home improvement value, EU7

6 of 7

markets where marketplaces gained share

+3 pts

UK, the fastest gain

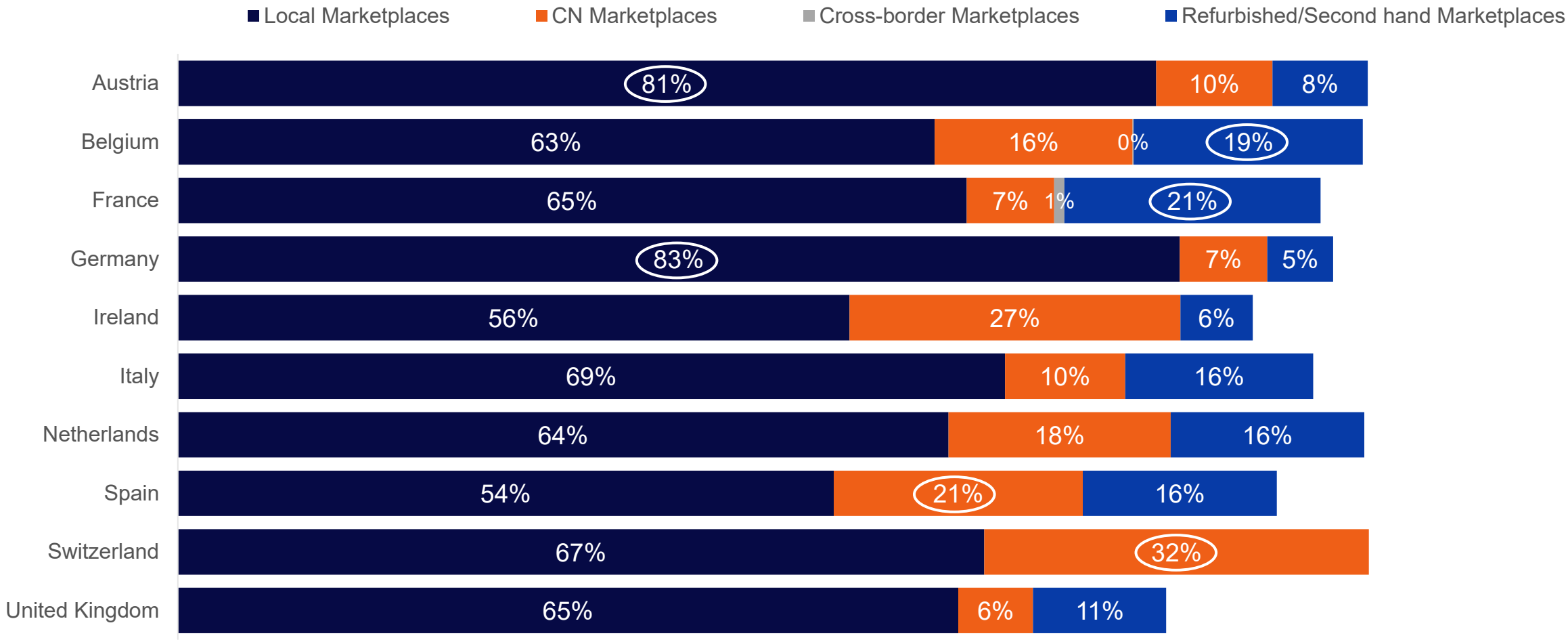
So what: a marketplace strategy is now core channel strategy for home improvement brands.

Source: NIQ Digital Purchases e-commerce consumer panel | Home improvement (DIY & tools, home & kitchen, lighting, garden) | Marketplace and retail | EU7 | 2026 YTD October vs YA

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The Marketplace landscape is evolving at pace – local players still dominate (incl. Amazon*) but Chinese players and Refurbished/second-hand platforms are growing

Value share within Marketplaces – Latest MAT (12-month) period



Source: NIQ Digital Purchases | Value Share within Marketplaces | MAT October 2026 | *Amazon is considered under local marketplaces as they have local operations and legal entities

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A new EU duty just hit Temu, Shein and AliExpress hard

On 1 July 2026, a customs "small parcels" duty on low-value, non-EU parcels has affected Chinese platform performance

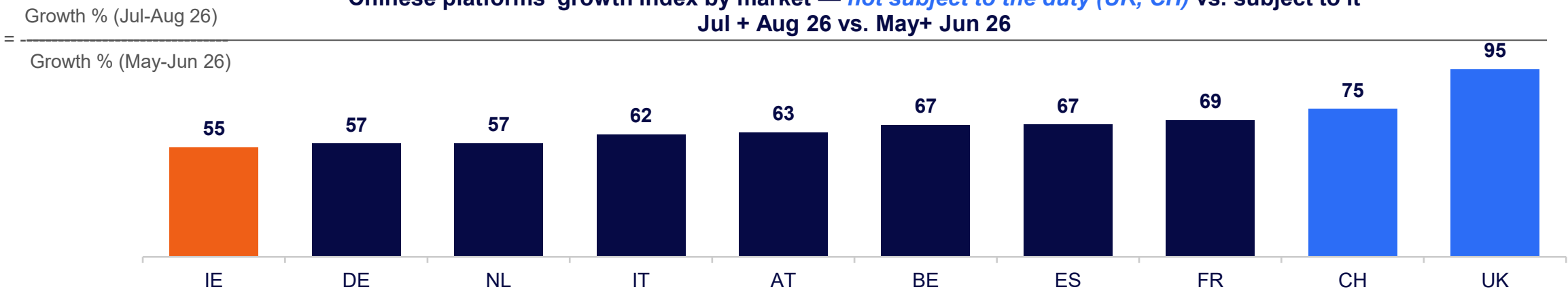
What changed?
€3
per customs category
in the parcel

What limit?
<€150
parcel value eligibility
(non-EU origin)

Which period?
2026–28
temporary duty window
from 1 July 2026

Impact
–27% / –45%
value / orders for Chinese platforms, EU10, Jul–Aug '26 vs YoY — vs. total ecommerce +3% / +6%

Chinese platforms' growth index by market — *not subject to the duty (UK, CH)* vs. subject to it
Jul + Aug 26 vs. May+ Jun 26



UK and Switzerland, outside the duty, held closest to last year's level; Ireland fell furthest.

Source: NIQ Digital Purchase eCommerce Consumer Panel, DE/UK/FR/IT/ES/BE/NL/IE/AT/CH, data to 30 Aug 2026

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The omni landscape today

eCommerce, omni, and digital innovation have increased the pace of change in retail

The pace of change is accelerating rapidly



Source: NIQ

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Too many choices.
Too many sources.
Too much information.



30%
Price comparison

Brand sites
29%

AI search
18%

45%
Search engine

33%
Retailer sites

31%
Review sites

Friends & family
18%

Social media
14%

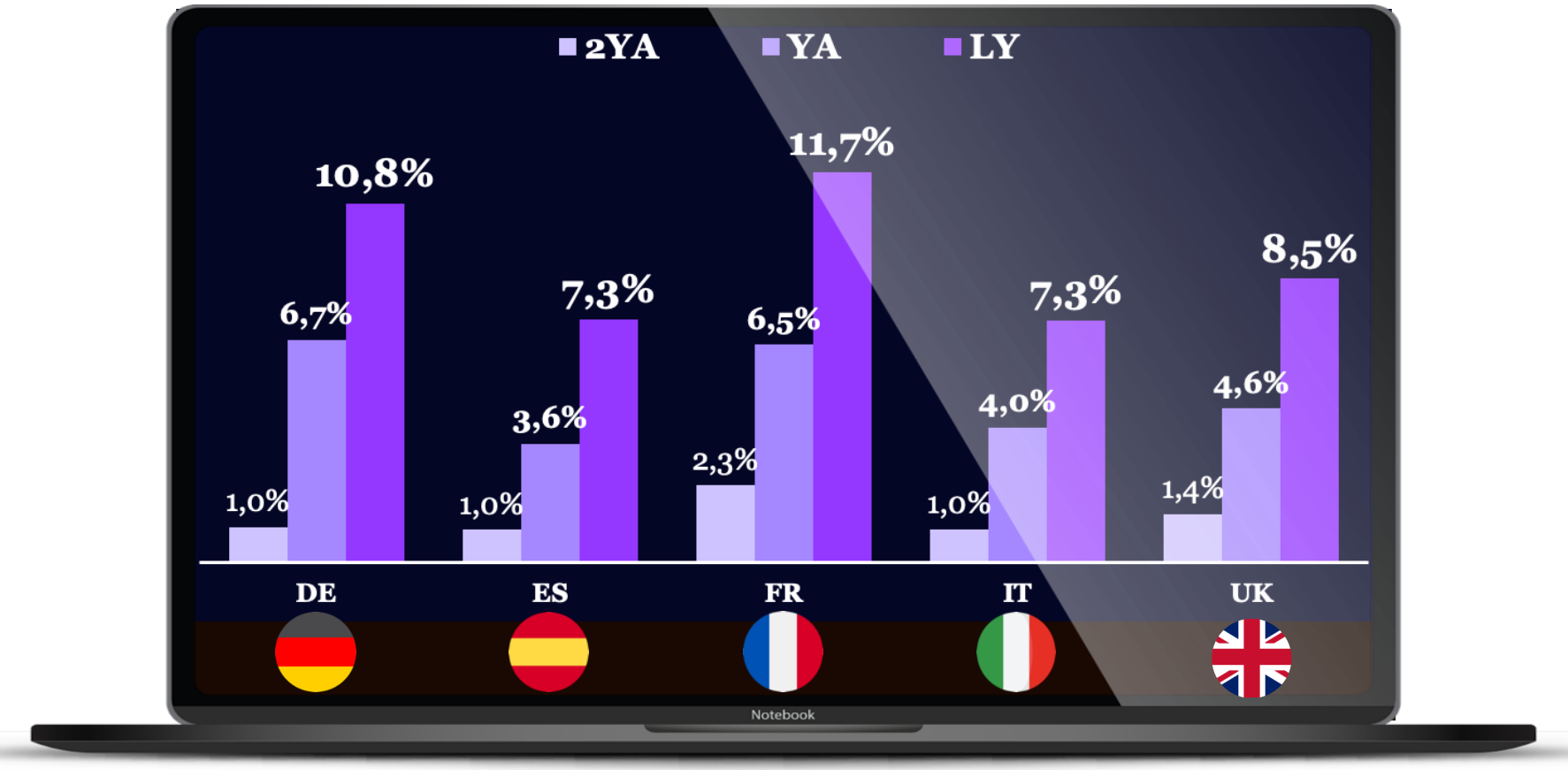
Source: NIQ newron Consumer

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The presence of AI Platforms paid subscribers* within the online shopper population has been multiplied by more than five in France VS 2024

Penetration of AI Platforms paid subscribers* per country – EU5 countries

100% Ecommerce of goods (services excluded) – T12M 06/09/2026 and 2YA



* AI Platforms included :

ChatGPT

Claude

Mistral AI

perplexity

Source: NIQ Digital Purchases e-commerce consumer panel DE, ES, FR, IT, UK. Moving Annual Total (L12M) ending on the 06th of September 2026 and 2 years ago. Total Ecommerce of goods (services excluded).
*AI paid subscribers = people that subscribed to AI platforms at least once (one monthly access) during the year. ChatGPT : only Go and plus subscribtions taken in consideration, Claude Pro, Perplexity Pro, Le Chat

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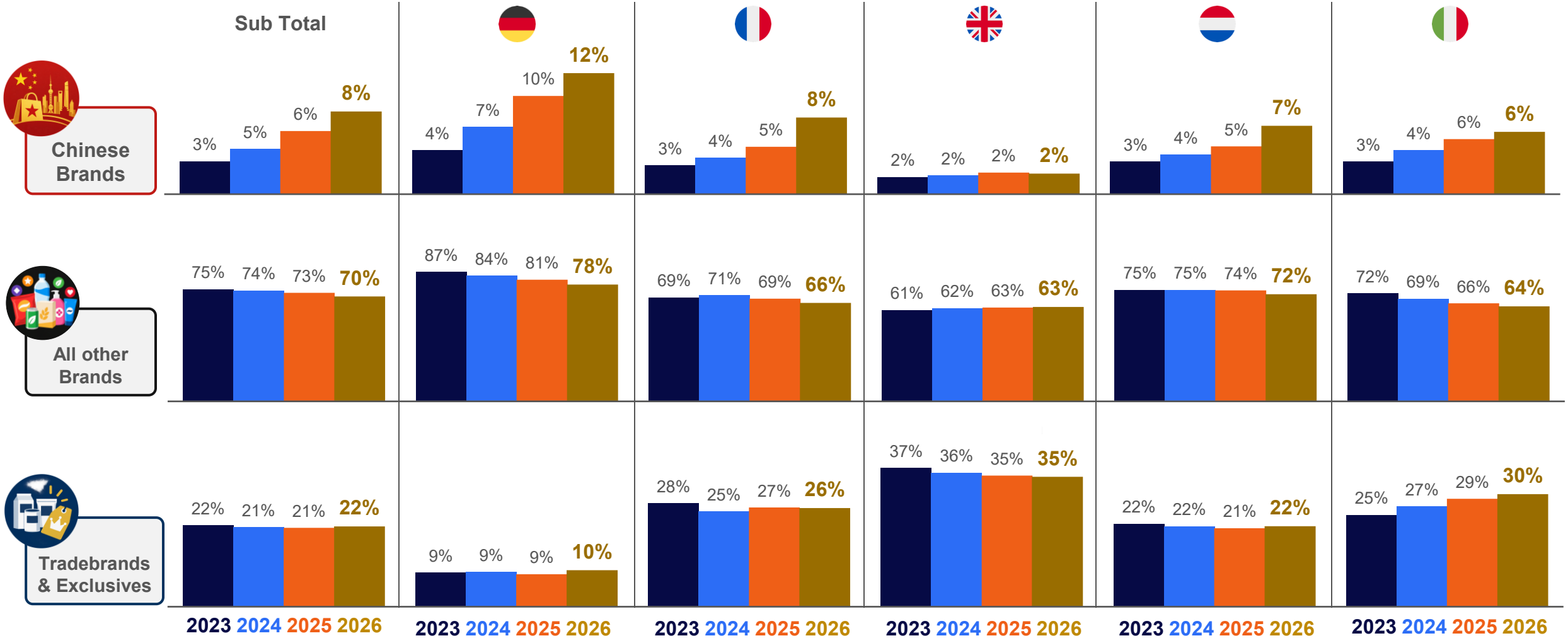
NIQ GfK

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Market shares by countries and brand groups

Chinese brands continue to gain share across EU5 markets, while established brands lose ground.

EU 5 | PowerTools/ Powered Gardening/ Lighting | YTD Sep 23- 26 | Value Market Share

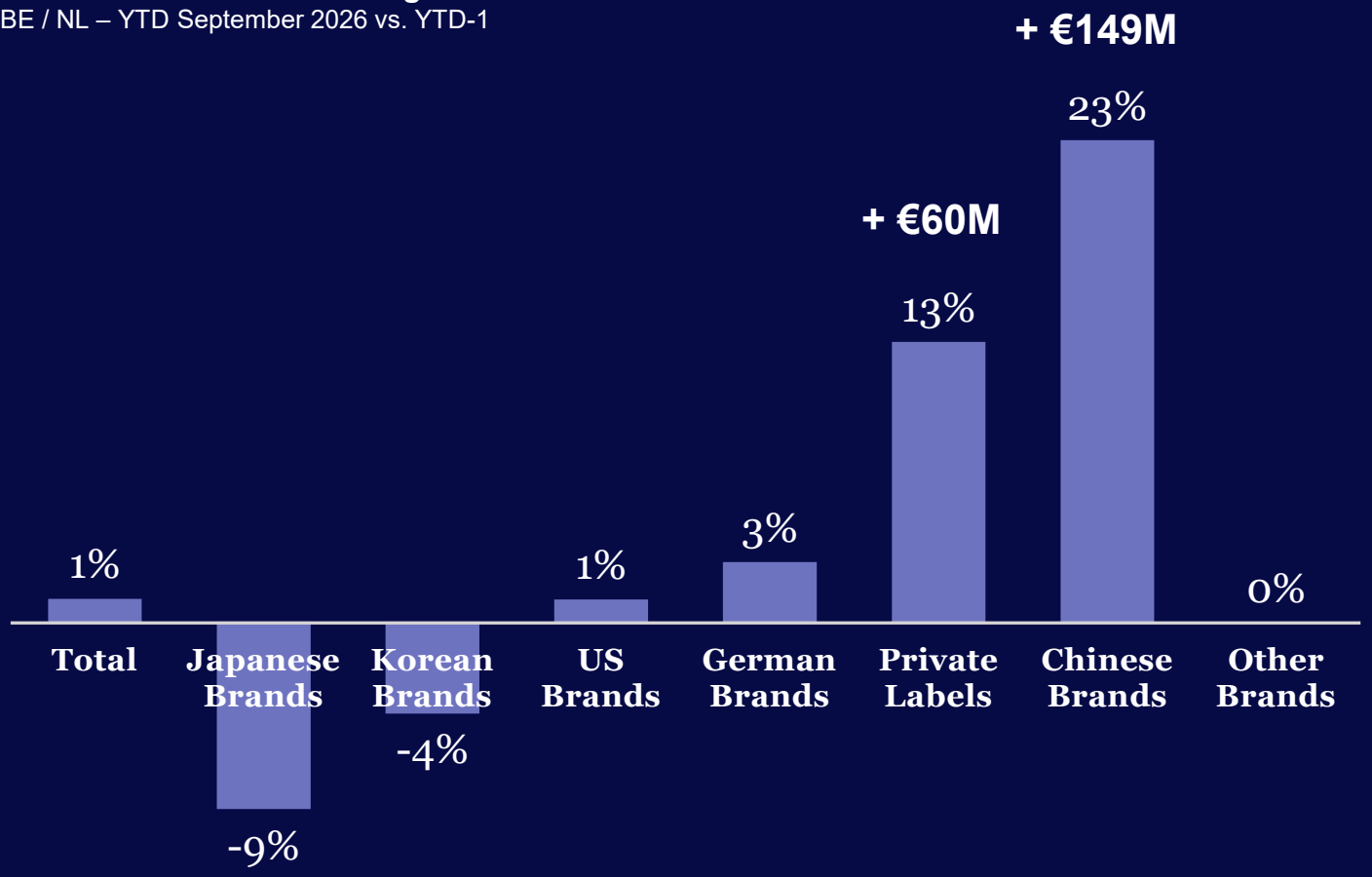


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Private Label & Chinese T&D brands fastest growth engine in Benelux

Chinese brands grow 23% compared to last year

T&D Brands Total Value Chg. vs YTD-1
BE / NL – YTD September 2026 vs. YTD-1





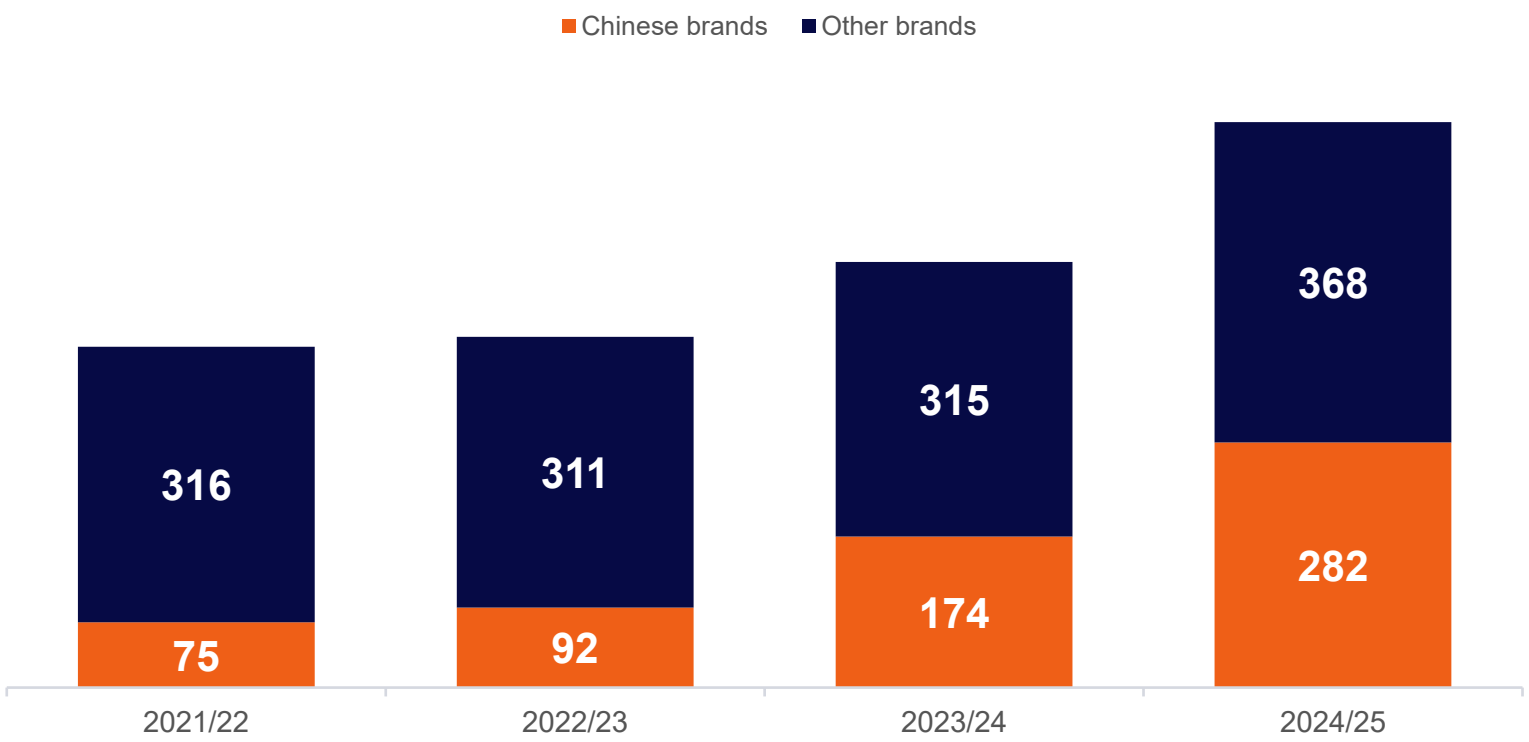
Source: NIQ Market Intelligence | Belgium & Netherlands | Panelmarket

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Chinese challengers have more than doubled their share of robot mowers in three years

Automation categories show how quickly a market can flip when features per euro win

Robot lawnmowers, Europe: sales value (m) by brand origin



Chinese brand share of value

19%
2021/22

43%
2024/25

3.7x

growth in Chinese brand sales value in three years

Other brands grew 16% over the same period

So what for incumbents: defend with ecosystem, service and trust, and make the value case as clear as the spec sheet.

Source: NIQ Market Intelligence | Panelmarket incl. wholesalers | Robot lawnmowers | AT, BE, FR, DE, GB, HU, IT, NL, CH | MAT Jun–May | Chinese brands = Worx, Kress, Yard Force, Mova, Segway, Ecovacs, Dreame, Mammotion

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Zoom on robot vacuums: Every digital force in one category

Strong growth, sold mainly through marketplaces, and led by Chinese brands



Value growth

+24%

2025 vs 2024

+18%

2026 vs 2025

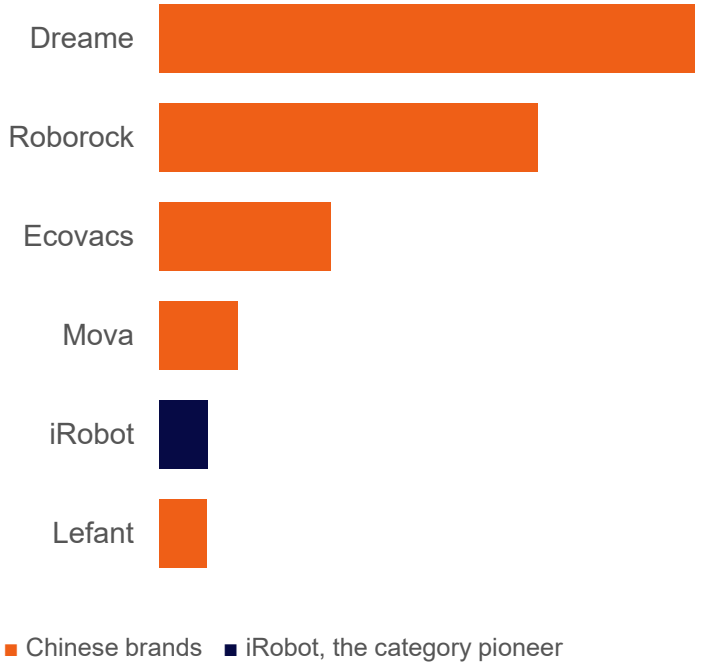
Asian platforms already on the list

TikTok Shop (#7)

JoyBuy (#13)

AliExpress (#14)

Top brands, share of value



So what: the top 3 brands, all Chinese, hold 69% of value and more than half of sales go through Amazon

Source: NIQ Digital Purchases e-commerce consumer panel | Robot vacuum cleaners | Marketplace and retail | EU7 | Value | 2026 YTD October

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Second-hand doubles in Belgium and the Netherlands, while the UK and Germany stay flat

Second-hand share of home improvement sales, this year vs last year – growth is led by challenger markets, not by France

Belgium & The Netherlands

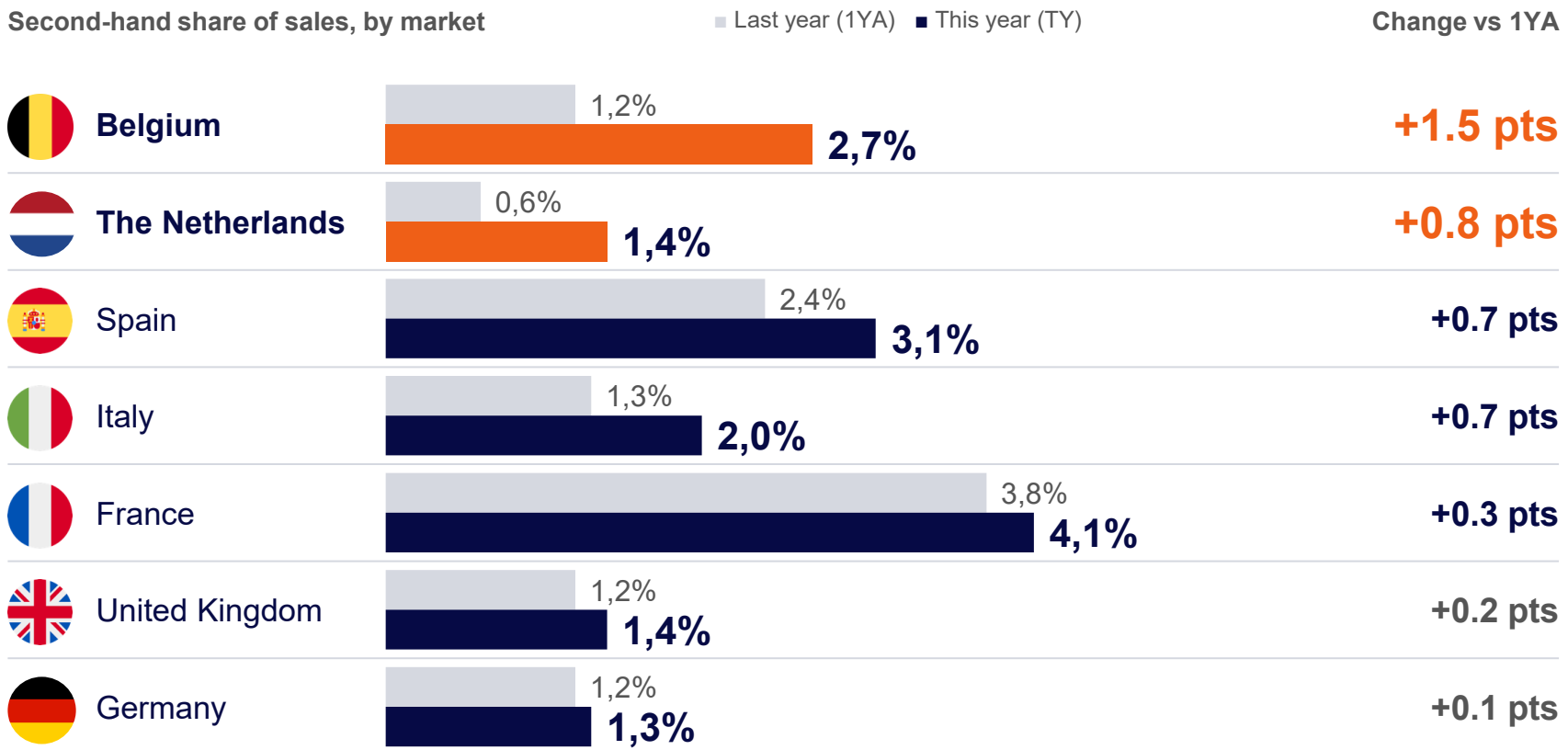
2x+

share of sales vs last year
BE 1.2% → 2.7% | NL 0.6% → 1.4%

UK & Germany

+0.1–0.2 pts

share of sales vs last year
UK 1.2% → 1.4% | DE 1.2% → 1.3%



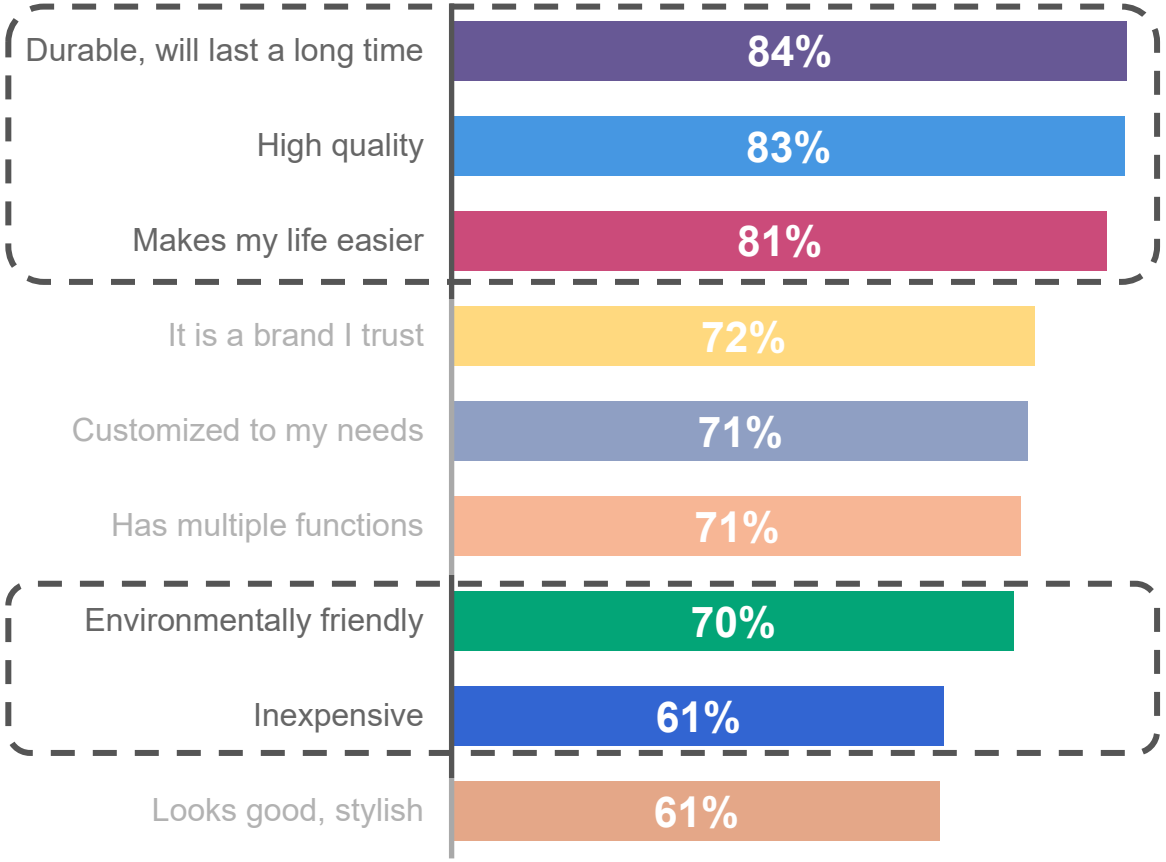
So what: Belgium and The Netherlands are the new second-hand hotspots – activate circular offers there first; France remains the largest pool at 4.1%

Source: NIQ Digital Purchases, data up to October 2026 vs YoY | Home Improvement | Marketplace and Retail | EU7 | Second-hand share of sales (refurbished stays at 0.2% or less in every market)

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Motivations for second-hand purchasing go beyond just price.

Drivers to buy second-hand





Source: NiQ Consumer Life, Bought a refurbished/previously owned technology or electronic product - Importance considering value of product/service, Core 18 countries, 2024 only

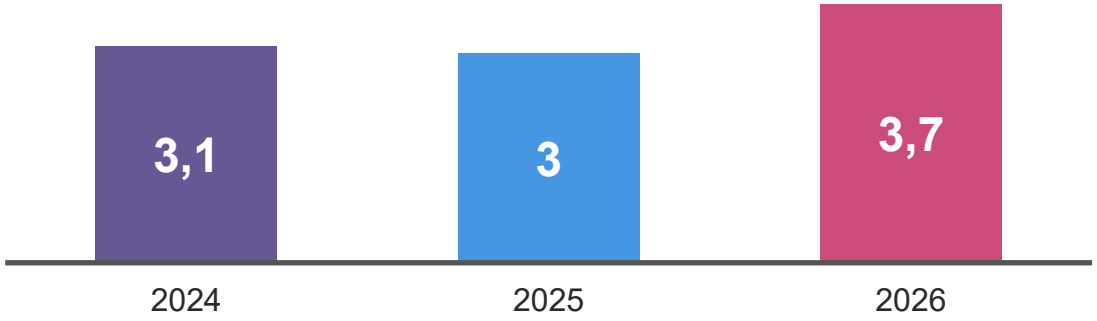
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Tools and indoor lighting are seeing growth of second-hand purchasing.

EU7 | 2026 to end of October | value share of total second-hand sales (%)

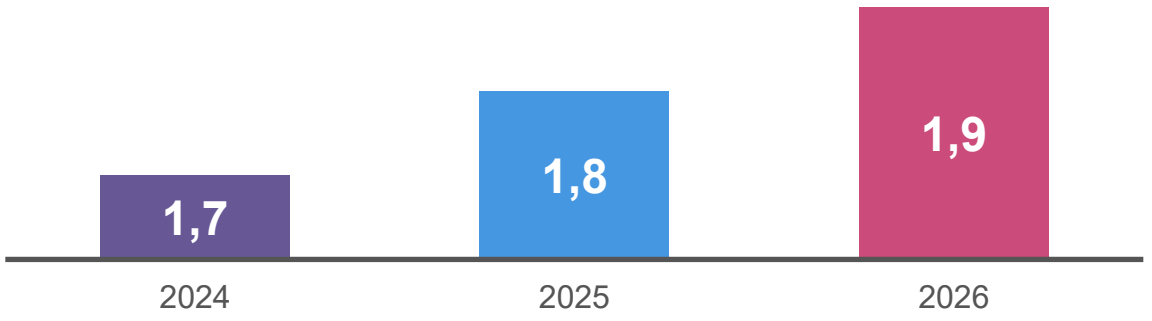


Power, Garden, and Hand Tools





Indoor lighting



NIQ Digital Purchases, data up to October 2026 vs 2025 and 2024 – Marketplace and Retail – EU7

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Key takeaways

Earn the consumer's investment

Focus on the categories, projects and consumer segments where spending continues to concentrate, from home maintenance and renovation to outdoor living and gardening.

Deliver and communicate value

As price-led growth fades, consumers continue to invest in premium solutions, but only when durability, convenience, efficiency or performance clearly justify the spend.

Be present where decisions are made

The path to purchase is now shaped by marketplaces, AI recommendations and social content. Brands that simplify choice and build trust will gain share.

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Thank you very much



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