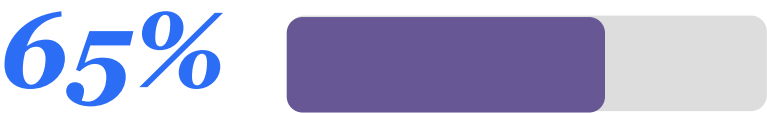


The landscape of Home Improvement and DIY in 2025

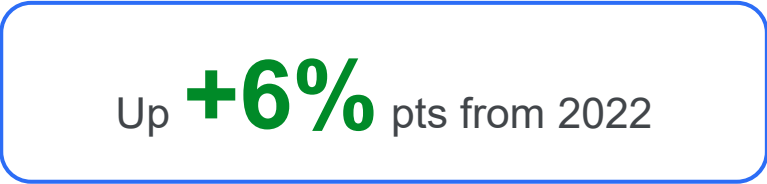
How attitudes, demographics, and e-commerce
are shaping the industry



The percentage of people planning on renovating or decorating has increased.



of respondents plan on **renovating or decorating** their home in the next 12 months

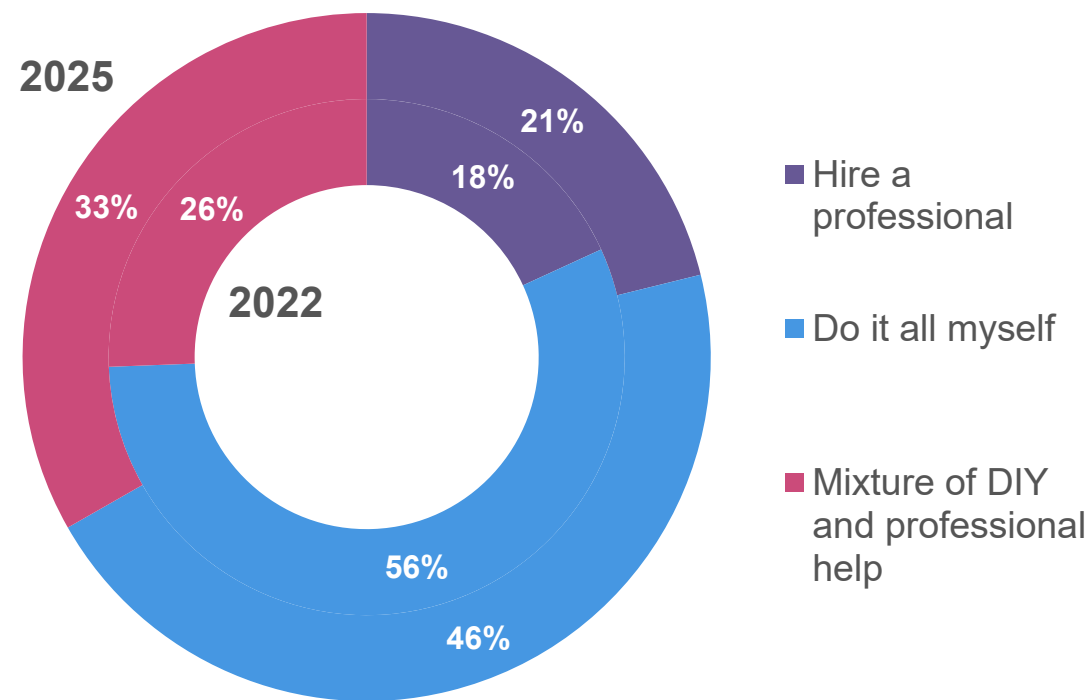


of consumers perform **home maintenance, repairs or improvement on a monthly basis** or more often



Source: NiQ Omnibus Survey 2025 vs 2022, DE and UK. Question 6: Are you planning to renovate or decorate your home in the next 12 months? If so, which of the following areas will you renovate / decorate. Question 7: How do you plan to undertake the decoration or renovation work?
NiQ Consumer Life – 2014 – 2025 Global study, 2025 wave

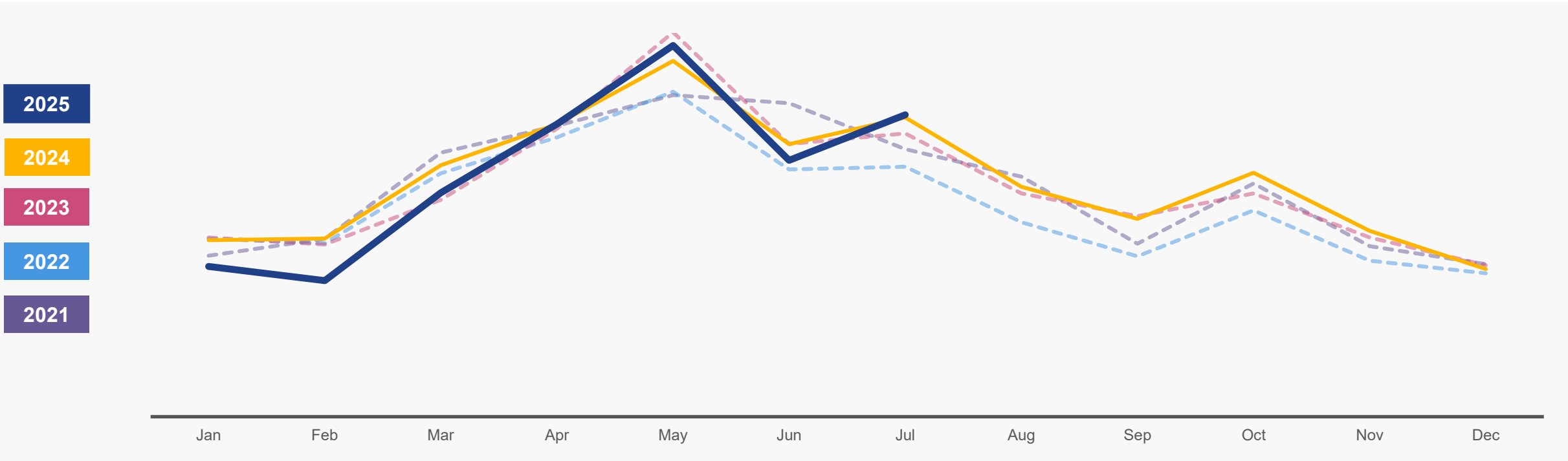
The nature of this work has changed, with more of a focus on professional help.



Source: NIQ Omnibus Survey 2025 vs 2022, DE and UK. Question 6: Are you planning to renovate or decorate your home in the next 12 months? If so, which of the following areas will you renovate / decorate. Question 7: How do you plan to undertake the decoration or renovation work?

2025 Sales value was above 2024 in the peak month of May, but behind 2023.

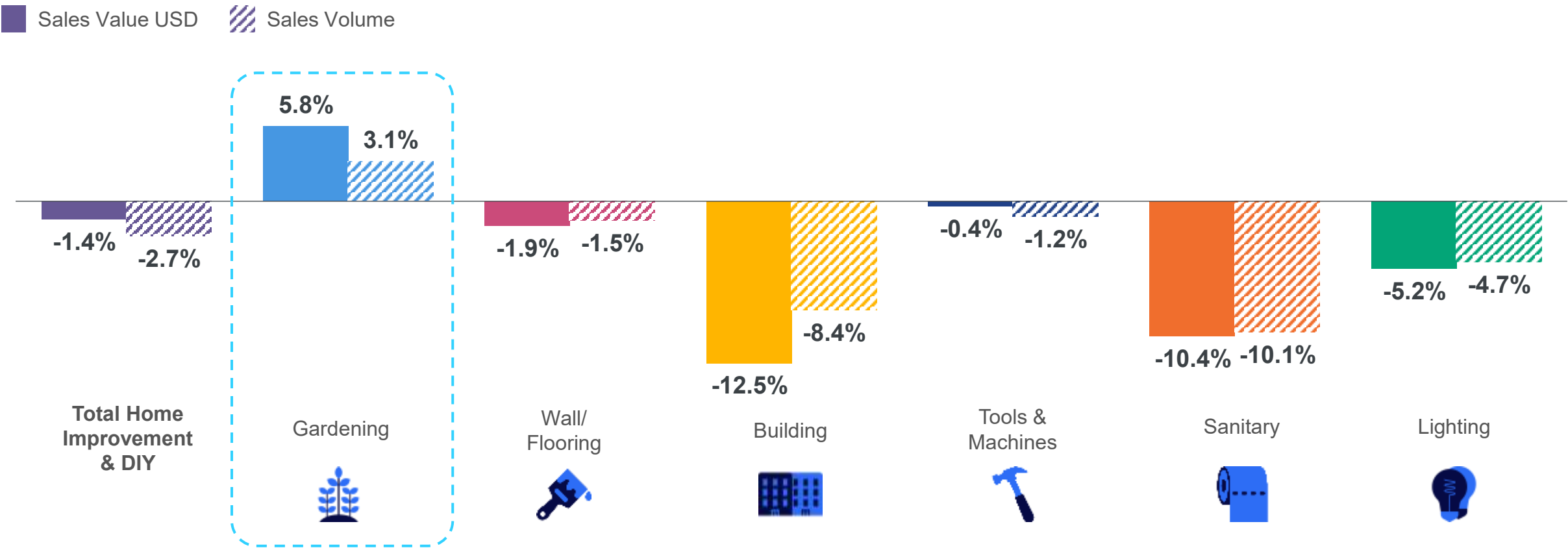
Global | Total Home Improvement & DIY | Sales Value (USD) | Jan 2021 – Jul 2025



Source : Market intelligence Sales Tracking Period: Jan 2021 – Jul 2025 Channel – Panel Market incl. wholesale; Total Gardening & Home Improvement

Only Gardening is in growth over the last 12 months, driving the industry in the peak month.

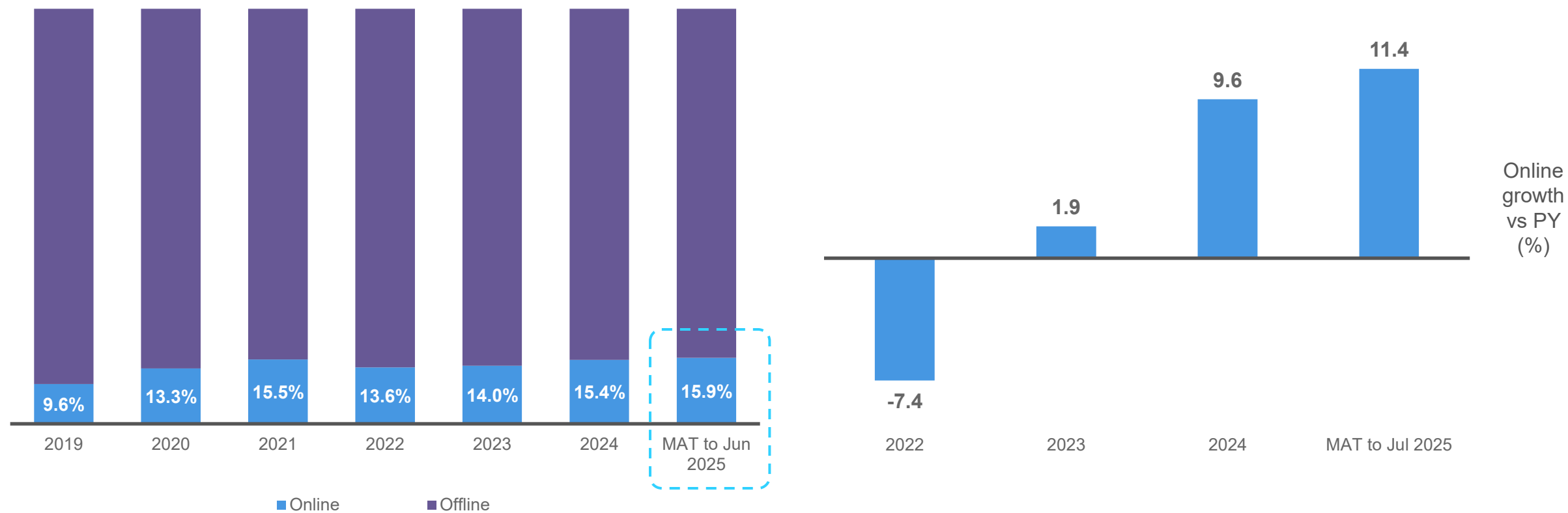
Global | Home Improvement & DIY | Growth rate PY | MAT Jul 24 – Jun 25



Source : Market intelligence Sales Tracking Period: Jan 2021 – Jun 2025 Channel – Panel Market incl. wholesale; Total Gardening & Home Improvement

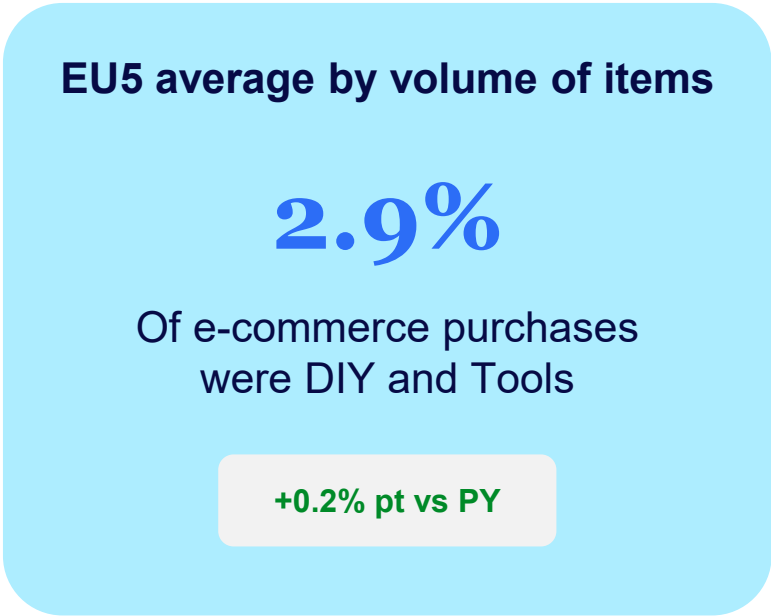
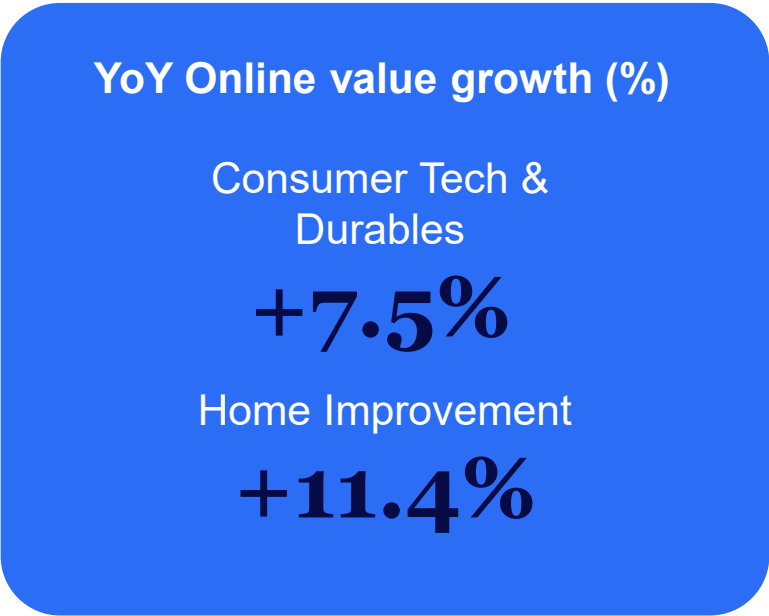
The classical online channel has grown for the third successive year.

Global | Home Improvement & DIY | Sales Value (USD) Share and Growth (%) | 2019 – MAT to Jul 2025



Source : Market intelligence Sales Tracking Period: Jan 2019 – Jul 2025 Channel – Panel Market incl. wholesale; Total Gardening & Home Improvement

The lay of the e-land.



Sources: Market Intelligence: Sales Tracking, Total Gardening & Home Improvement Coverage (excl. North America). Channel – Panelmarket including Wholesalers. Aug 24 – Jul 25 vs PY in USD
NiQ Consumer Life – 2014 – 2025 Global study, 2025 wave
NiQ Digital Purchases – 08/04/2024 – 03/08/2025 EU5 = UK, Ger, Fra, Ita, Esp

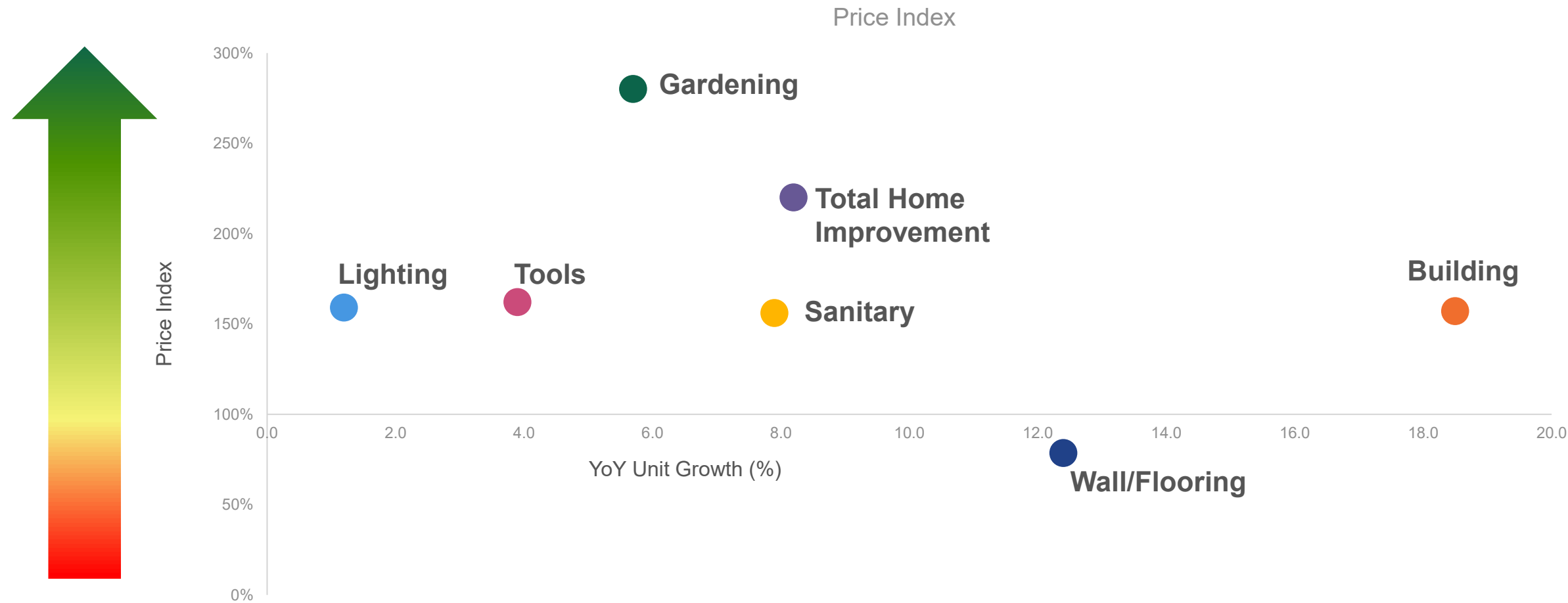
The online space is becoming ever more important to Home Improvement and DIY.



NiQ Omnibus Survey 2025, DE and UK. Question 6b: If you to renovate/decorate/garden your home, please select the answer that best matches your purchase behaviour:

All Home Improvement sectors, except Wall/Flooring, have a vastly positive price index Online, pumping value into the sectors.

Global | Online H&L | Period: Aug 2024 – Jul 2025 | YoY Online unit growth (%) and Online price index versus sector average

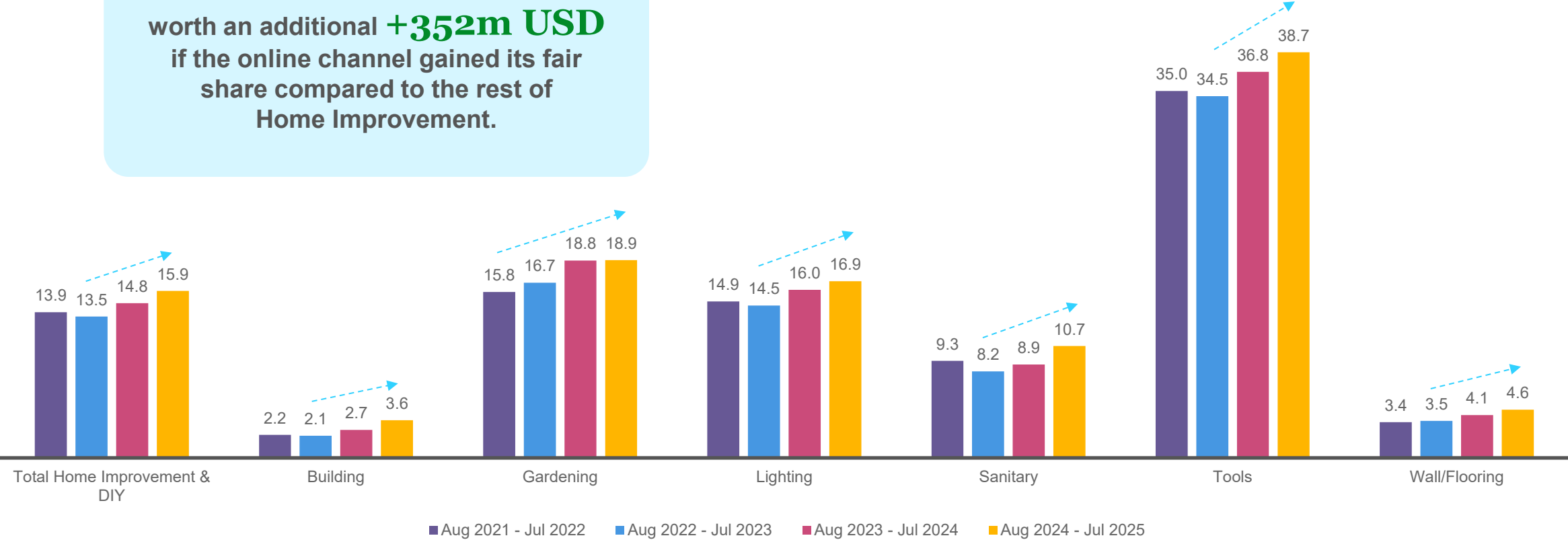


Source: Market Intelligence: Sales Tracking, International Coverage (excl. North America). Channel – Panelmarket including Wholesalers

Which has meant that, Home Improvement and DIY has seen an overwhelming return of e-commerce share.

Global | Total H&L | Period: Aug 2021 – Jul 2025 | Online share (%) in value of total sales

The Building sector alone would be worth an additional **+352m USD** if the online channel gained its fair share compared to the rest of Home Improvement.



Source : Market intelligence Sales Tracking Period: Jan 2019 – Jun 2025 Channel – Panel Market incl. wholesale; Total Gardening & Home Improvement

Demand has returned online and driven growth.

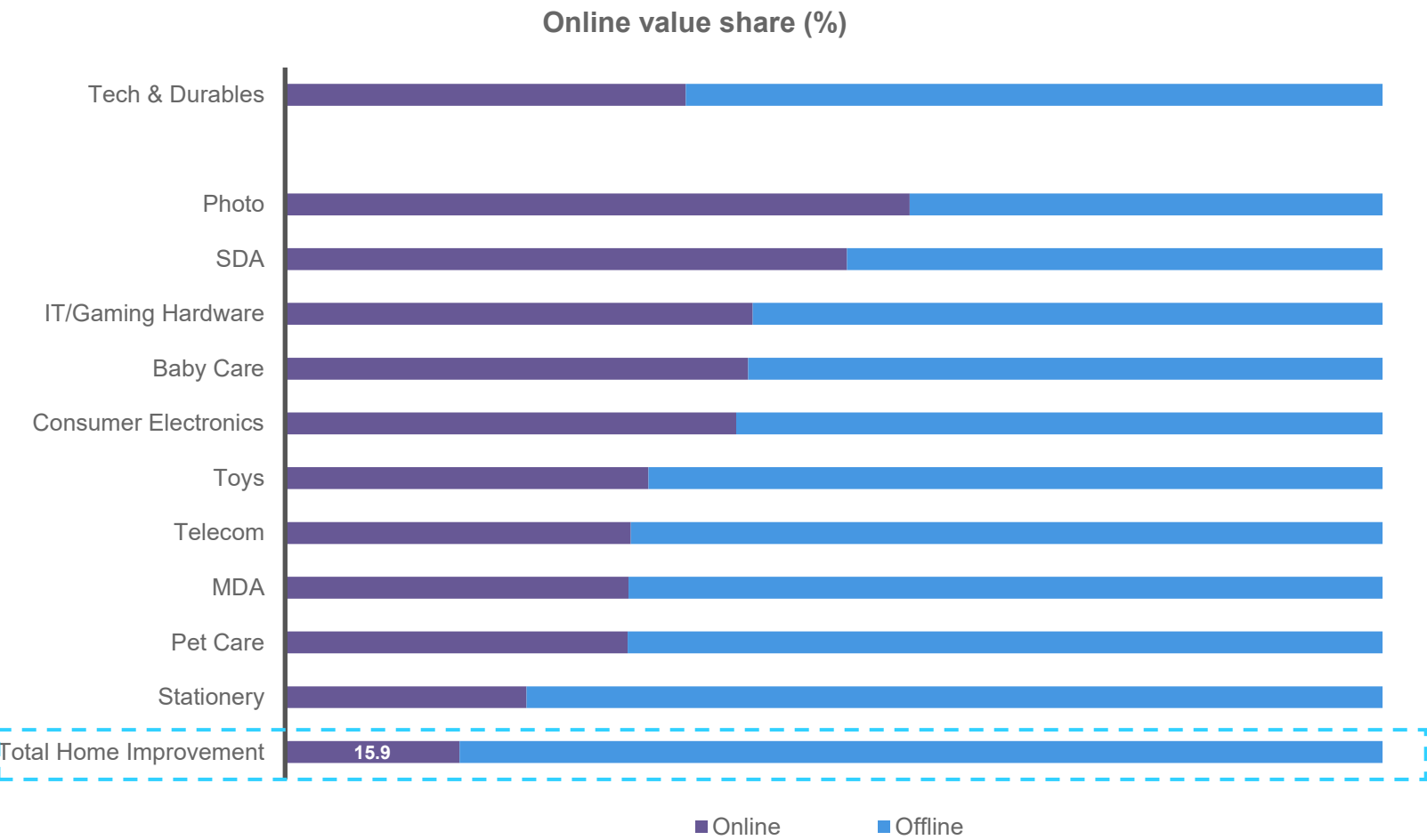
Global | Online H&L | Period: Aug 2024 – Jul 2025 | YoY Online Value Growth (000s EUR) by metric



Source: Market Intelligence: Sales Tracking, International Coverage (excl. North America). Channel – Panelmarket including Wholesalers

Despite its growth, there is still huge headroom for e-commerce to grow within Home Improvement.

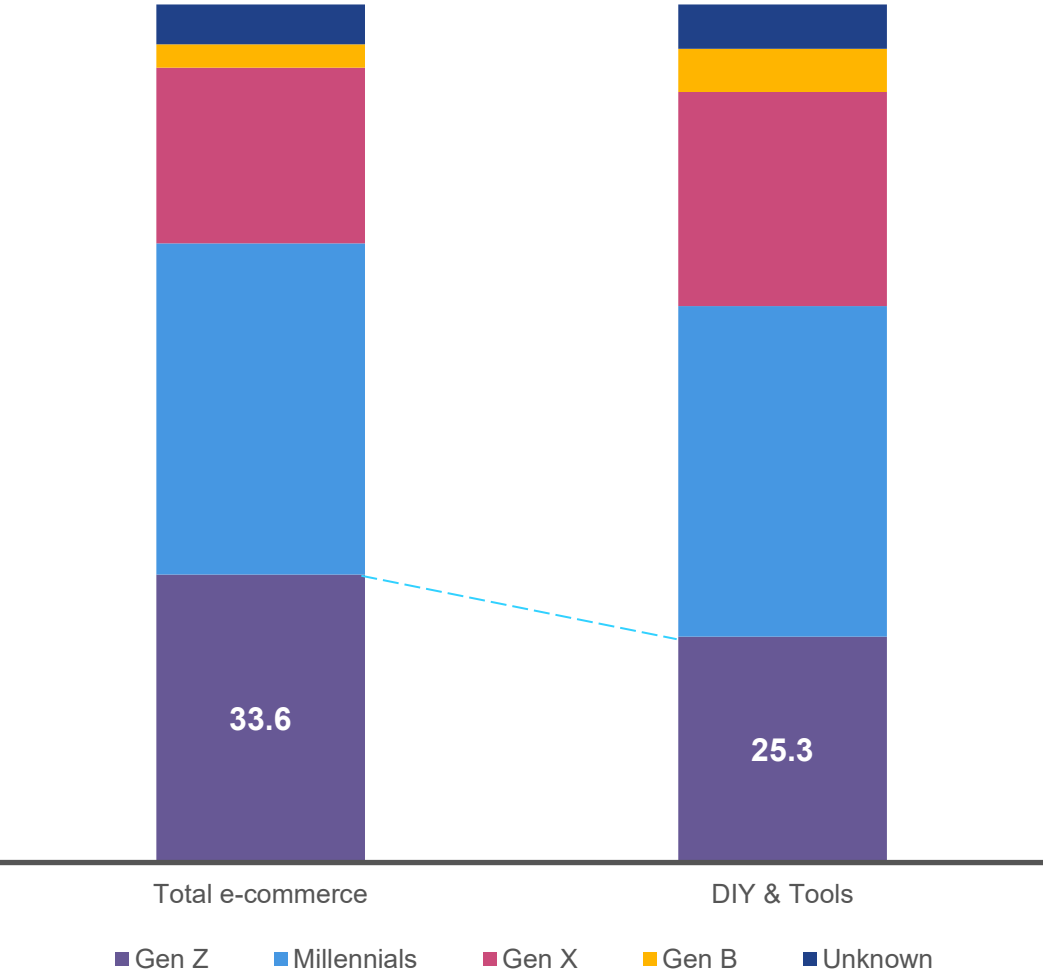
Global | Total H&L | Period: Aug 2024 – Jul 2025 | Value (USD) share of Online sales (%)



Over the last 12 months, at its current price index, Total Home Improvement & DIY would be worth an additional **+\$11bn** worldwide if the online channel gained its fair share compared to TCG.

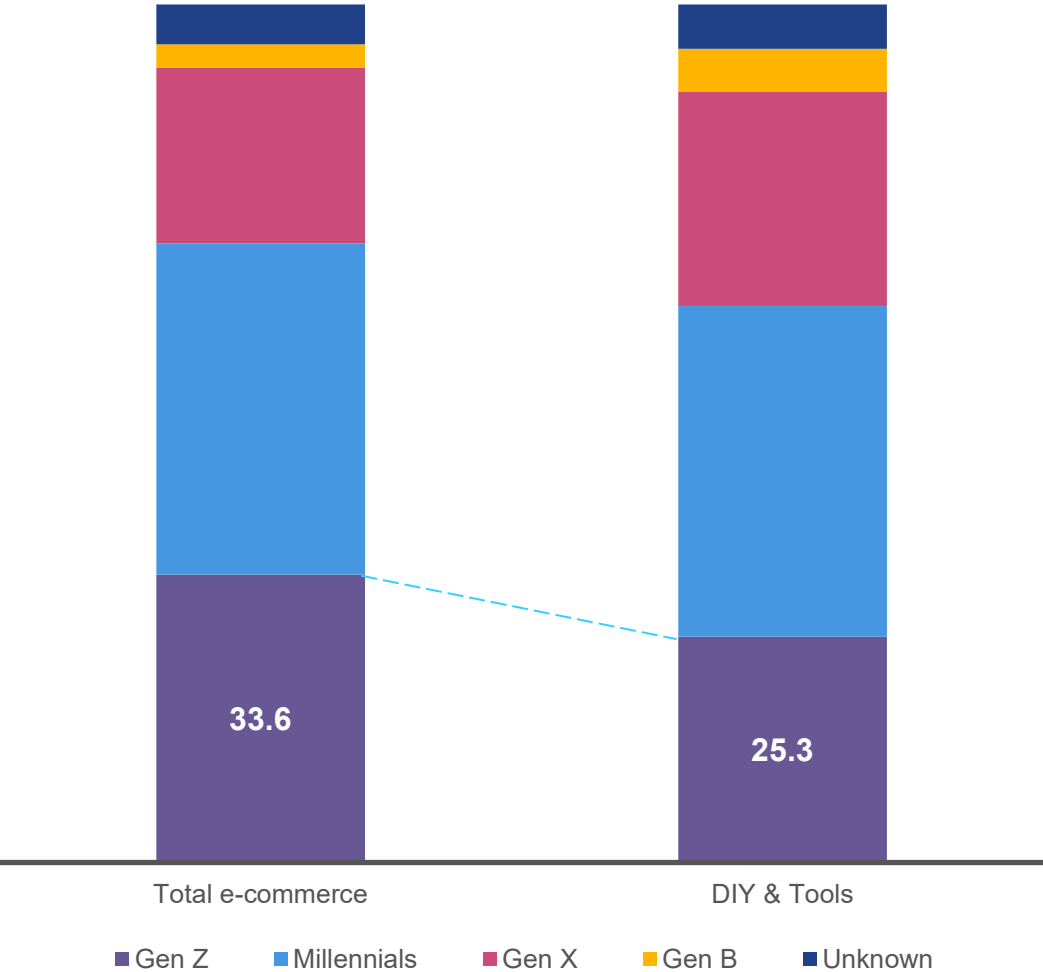
Source: Market Intelligence: Sales Tracking, International Coverage (excl. North America). Channel – Panelmarket including Wholesalers

Gen Zers may be the focus to fill this headroom.



Source: NiQ Digital Purchases – 09/06/2024 – 08/06/2025 | Average of EU5 by share of volume of items (%)

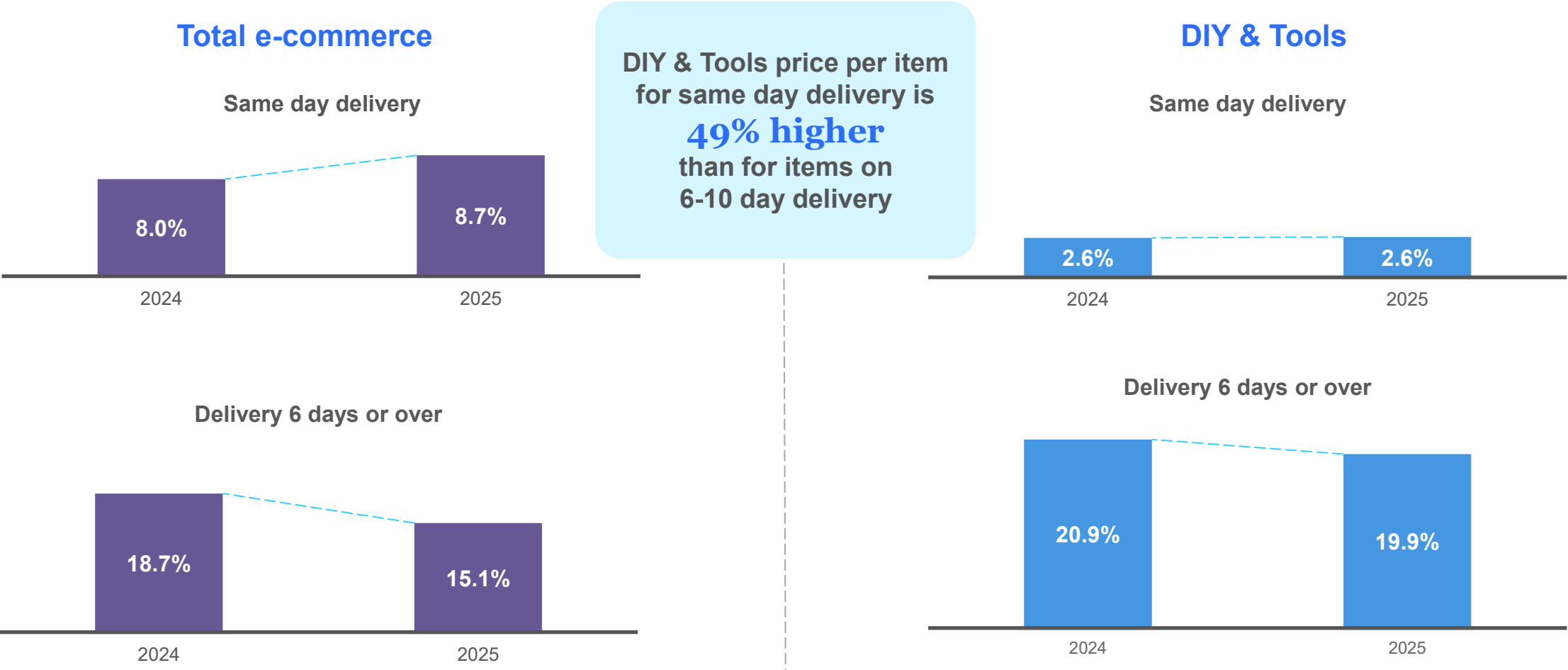
Gen Zers may be the focus to fill this headroom.



92% of people aged between 18-29 plan on renovating over the next 12 months.

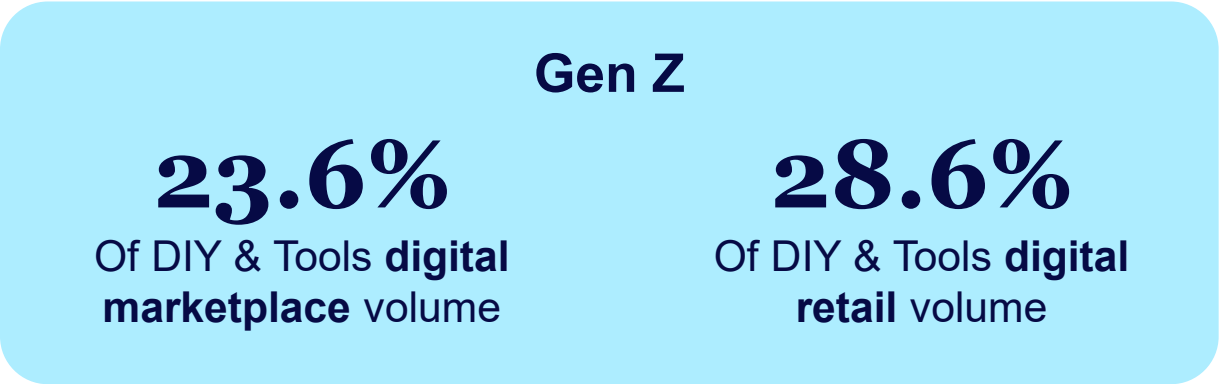
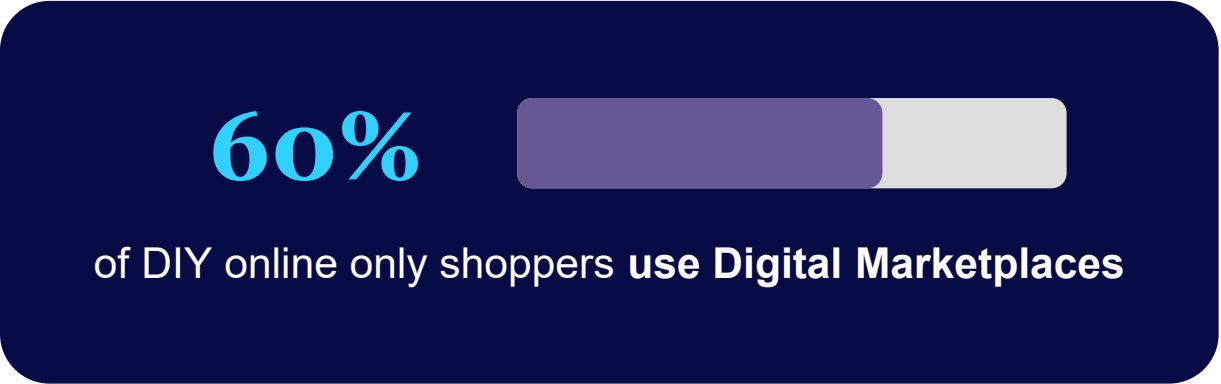
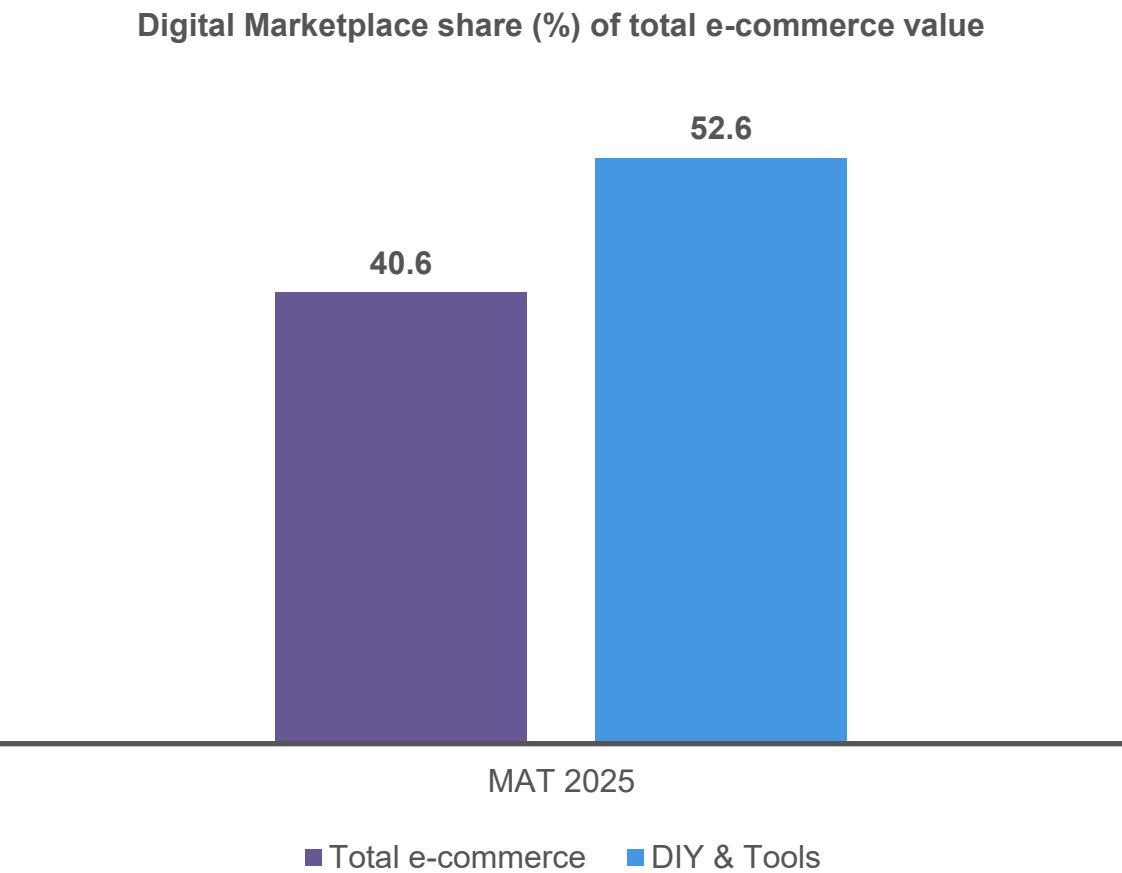
Source: NIQ Digital Purchases – 09/06/2024 – 08/06/2025 | Average of EU5 by share of volume of items (%)
Source: NIQ Omnibus Survey 2025, UK. Question 6: Are you planning to renovate or decorate your home in the next 12 months? If so, which of the following areas will you renovate / decorate.

With same day delivery being trialed in DIY, can this be an opportunity for the industry to play catch up?



Source: NIQ Digital Purchases – 09/06/2024 – 08/06/2025 | Average of EU5 by % of value
Price per item GBP to EUR exchange on 08/08/2025 at exchange rate of 1:1.15

The DIY area already over-indexes on Digital Marketplaces, and this could grow further.

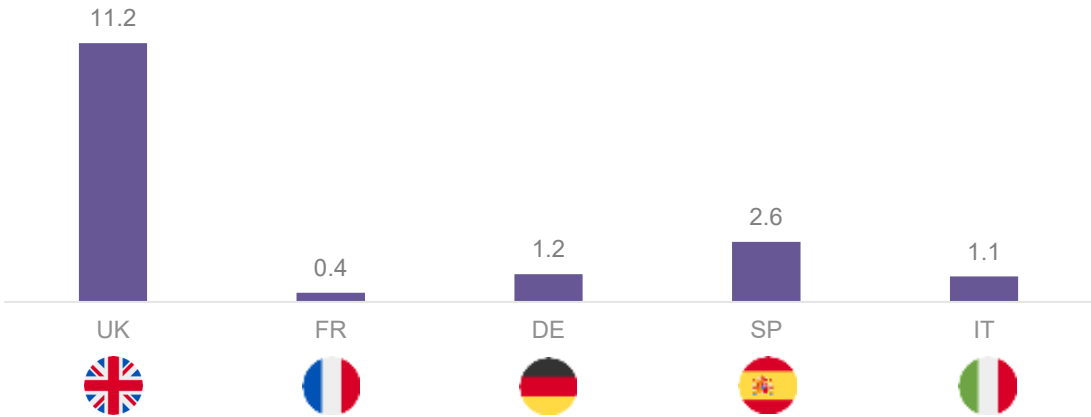


Source: NIQ Digital Purchases – 07/08/2024 – 06/08/2025 | Average of EU5 by share of value (%)
NiQ Omnibus Survey 2025, DE and UK. Question 6b: If you to renovate/decorate/garden your home, please select the answer that best matches your purchase behaviour

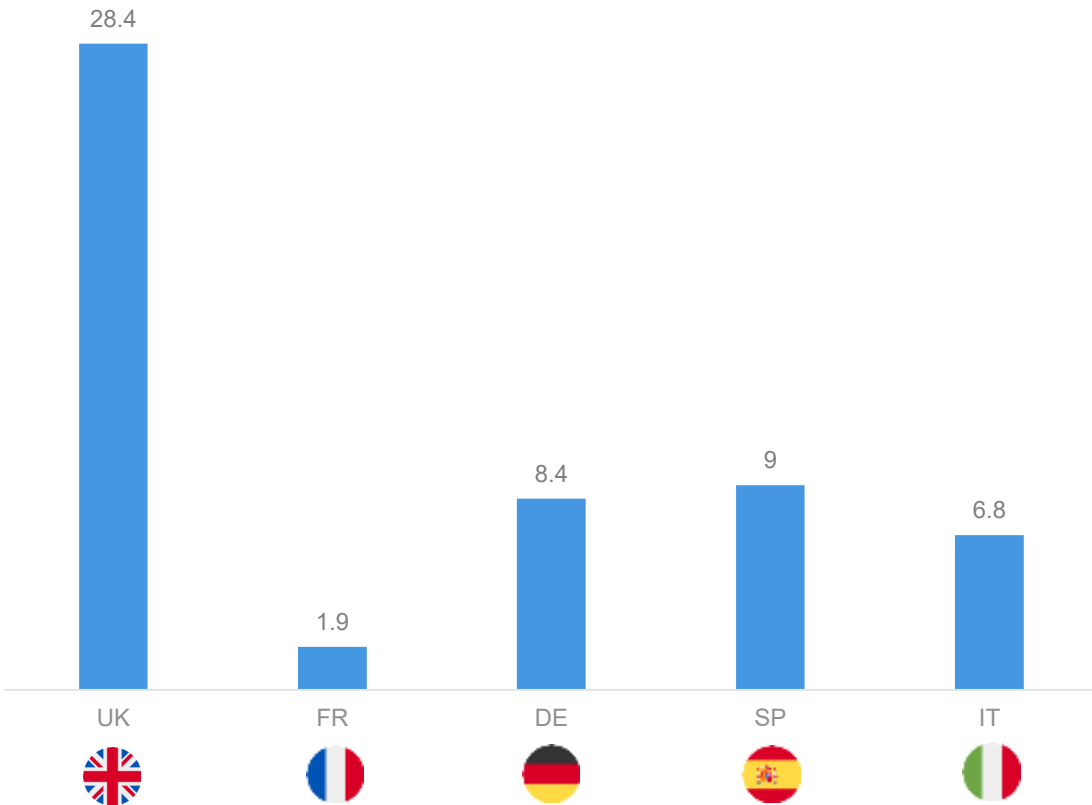
TikTok penetration has grown in EU5 and is significant in the UK.



TikTok’s penetration of DIY & Tools shoppers (%)



TikTok’s penetration of total e-commerce shoppers (%)

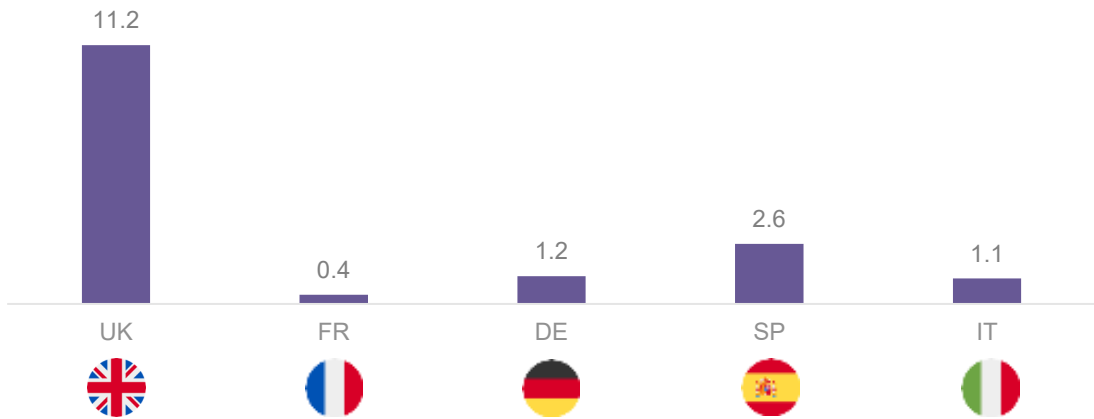


Source: NiQ Digital Purchases – 08/09/2024 – 07/09/2025 |

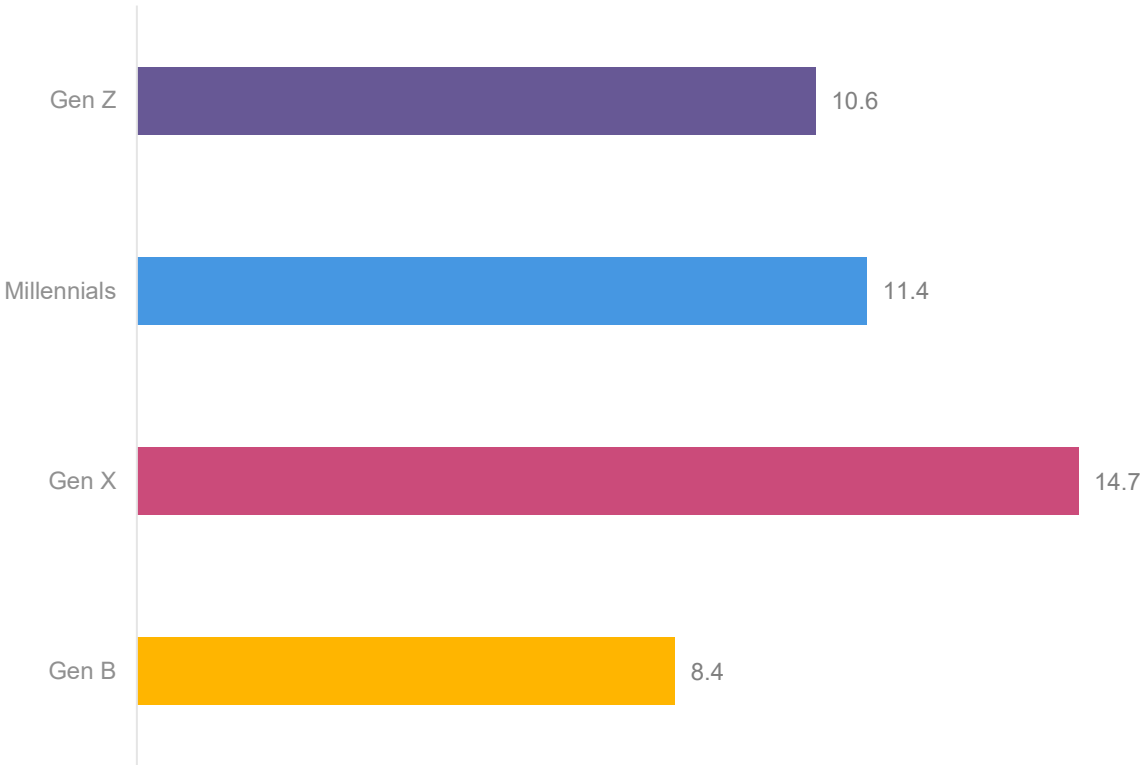
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TikTok's penetration of DIY & Tools shoppers (%)



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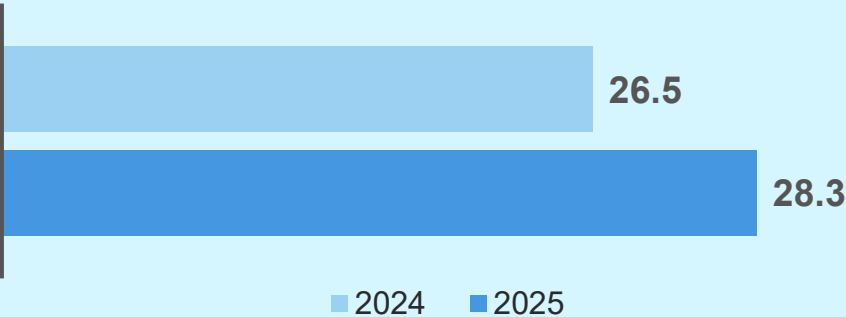
Source: NiQ Digital Purchases – 08/09/2024 – 07/09/2025 |

Interest in second-hand & refurbished purchasing has increased in the past decade.

Second-Hand



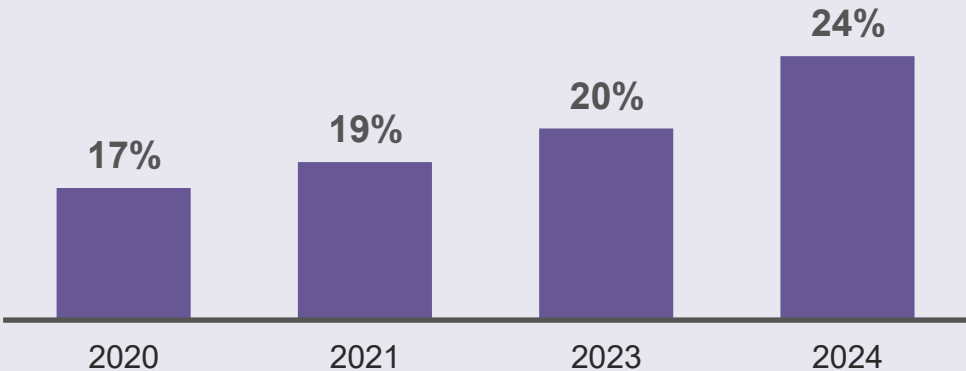
% shoppers “Bought something **second-hand** instead of new”



Refurbished



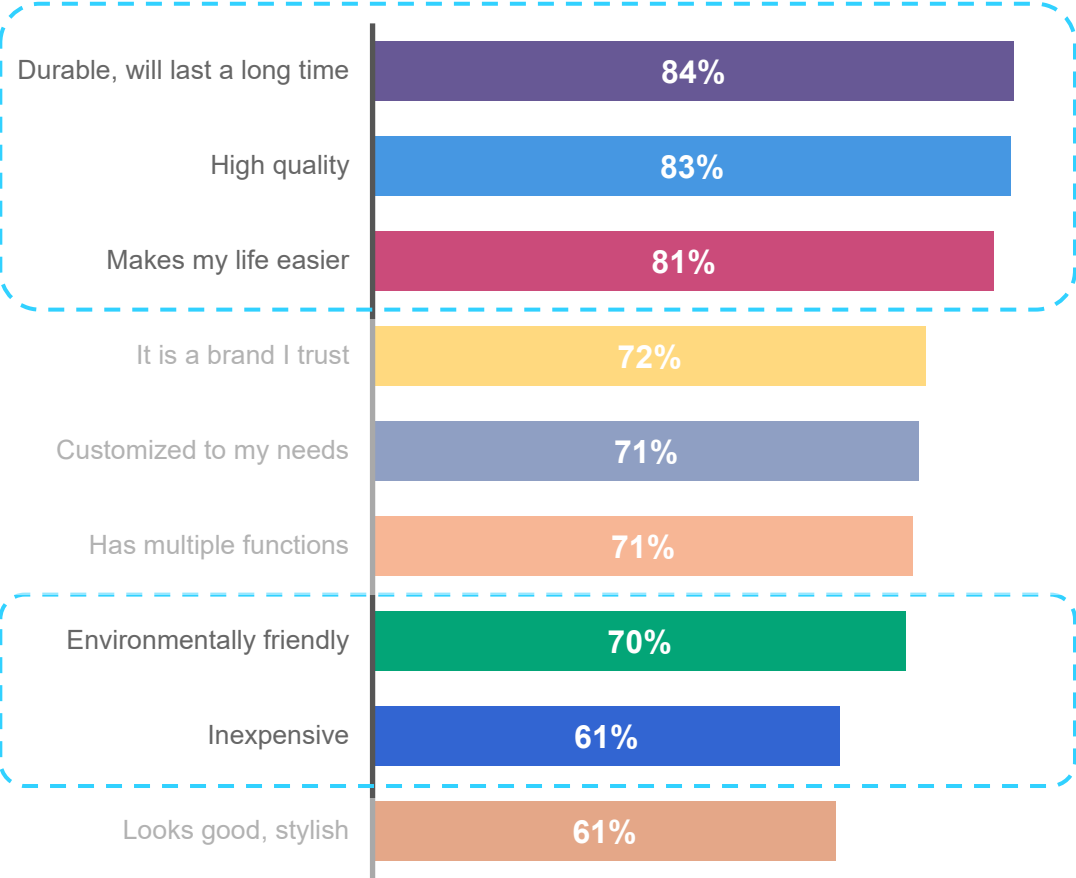
% who have **bought a refurbished**/previously owned technology or electronic product



NIQ Consumer Life Green Gauge® Report
NIQ Consumer Life Global 2025 Core 18 Countries and 2024 Global
<https://www.fastcompany.com/91185141/unilever-university-of-nottingham-unsold-flowers-fragrances-chemicals>

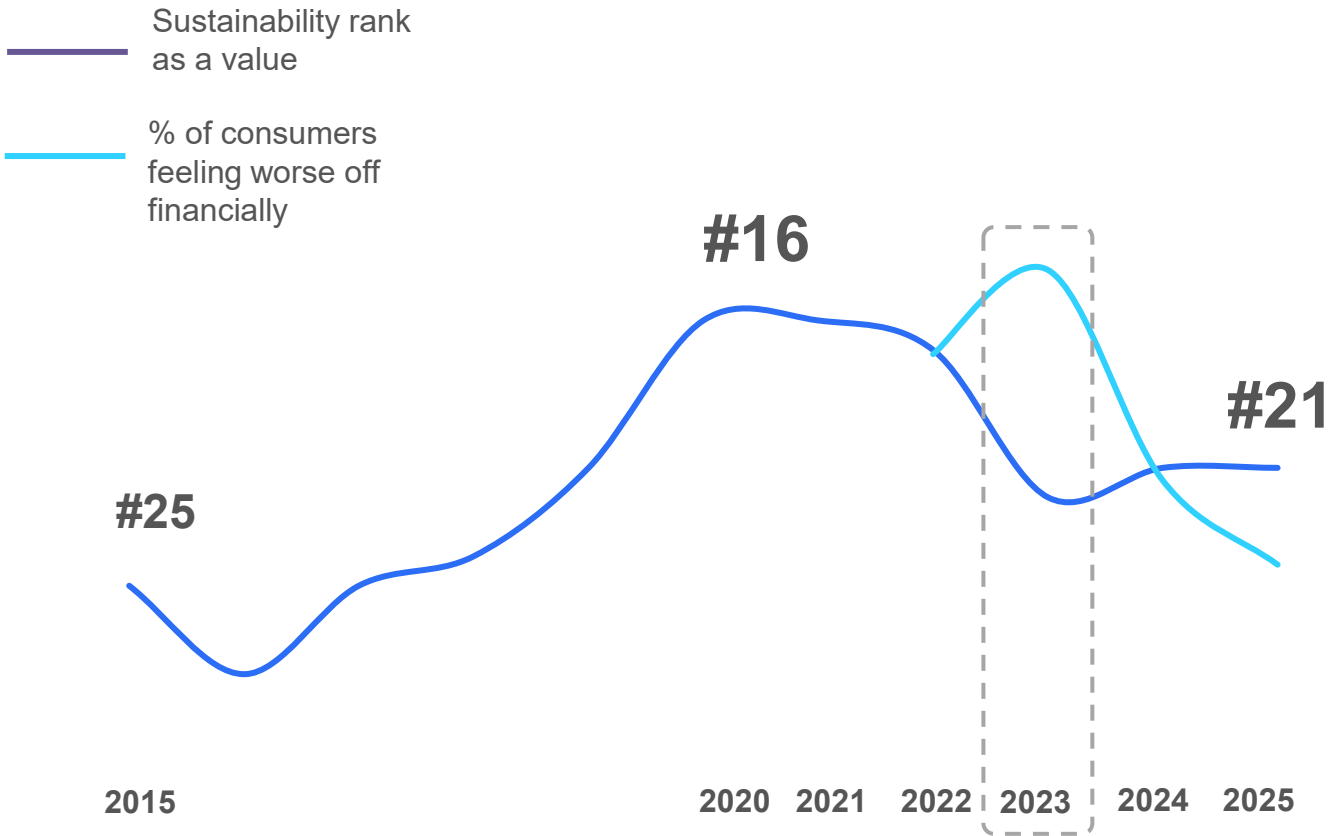
Motivations for second-hand purchasing go beyond just price.

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

Sustainability is a growing value in the long-term, although dips when consumers feel worse off.

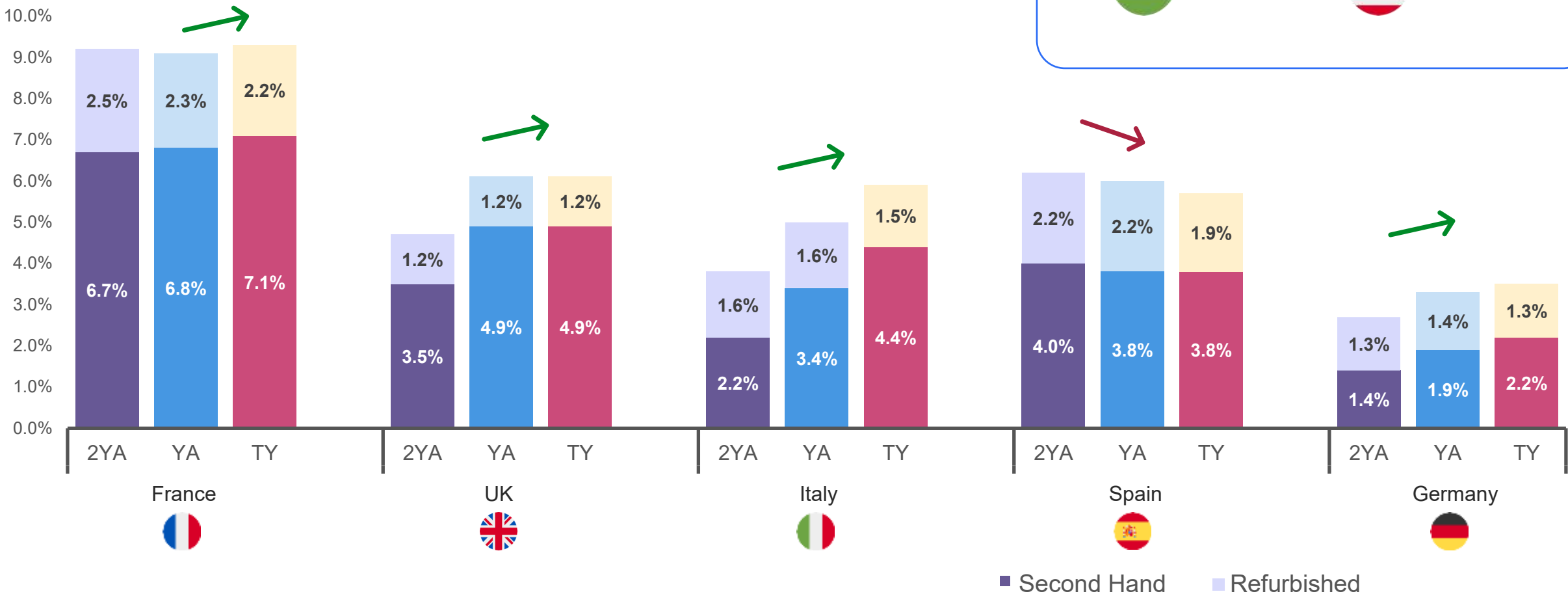


Source: NIQ Consumer Life Global 2024 and previous years, C1 (global = 18 countries), ranks out of 57 personal values
NIQ Consumer Outlook 2024/25, Global, Q: Compared to a year ago, is your household better off or worse off financially



Second-hand momentum continues to build across Europe.

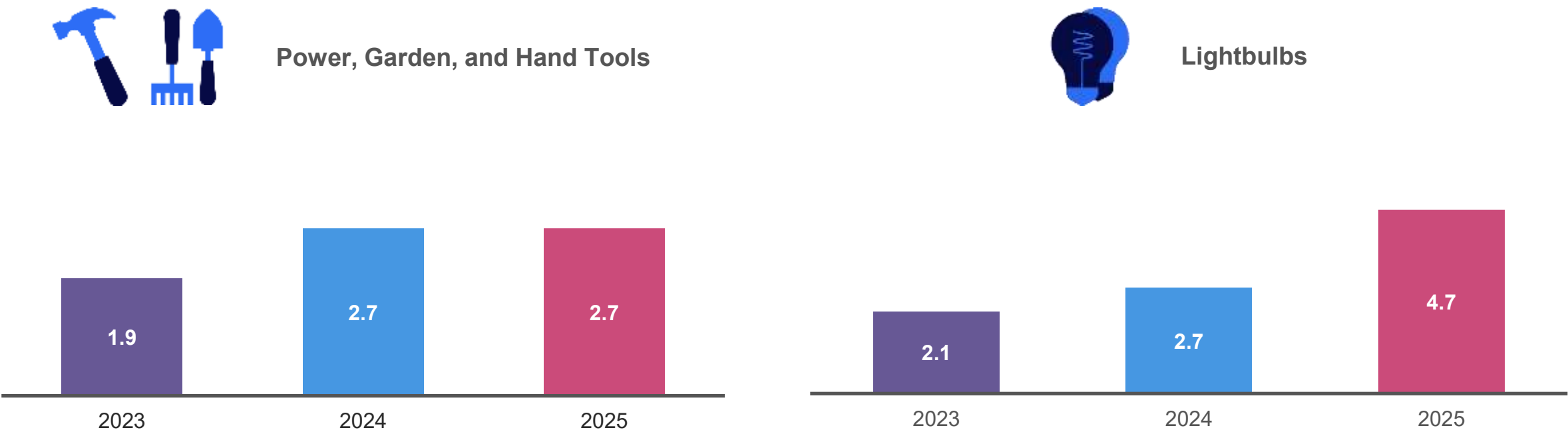
Second-Hand Share of Sales – Latest 3 MAT (12-month) periods – Total Ecommerce



Source: NIQ Digital Purchases Data Latest 52 Weeks 13th July 2025 – Second-hand share of category sales | ya = year Ago, TY = This year

Tools and Lightbulbs are seeing growth of second-hand purchasing.

EU5 | MAT to July 2025 | value share of total second-hand sales (%)

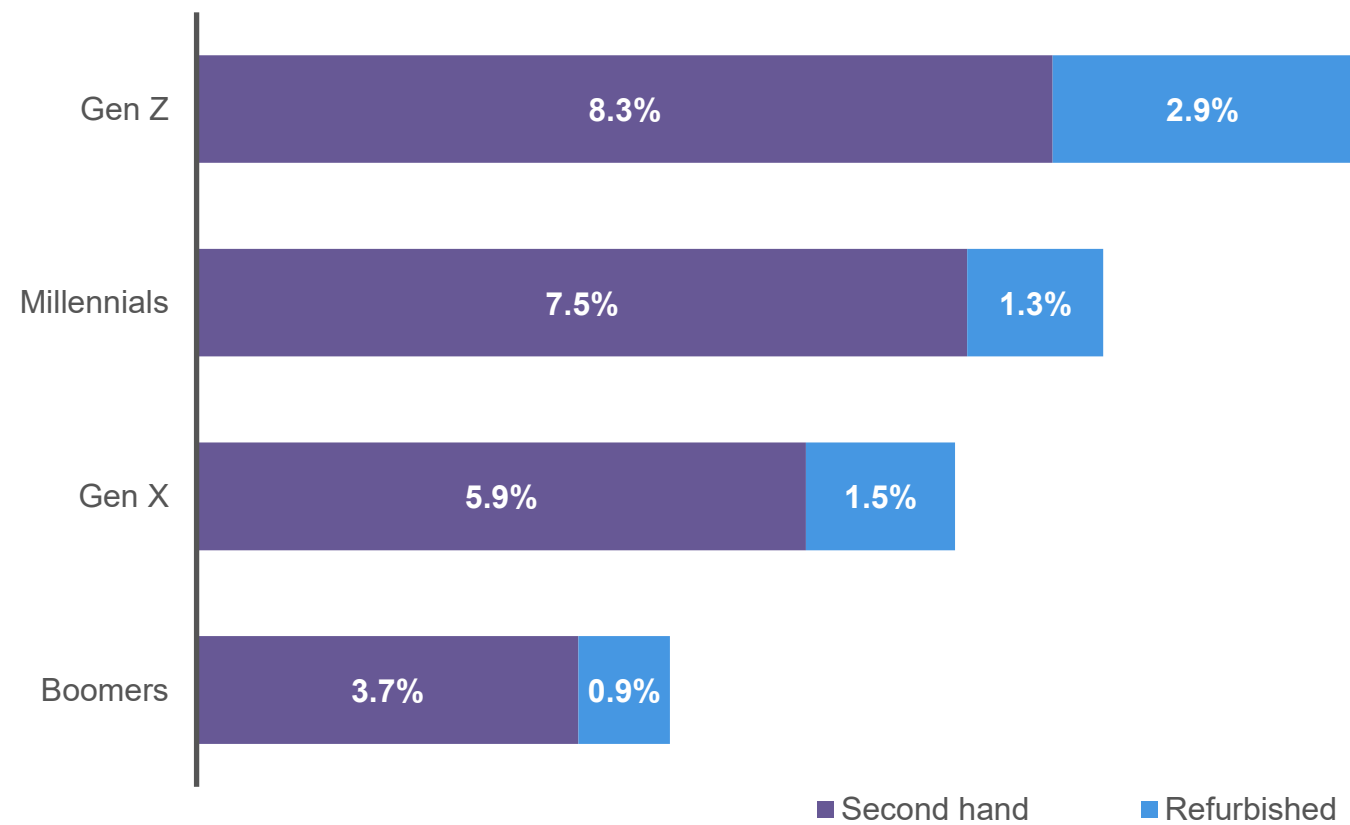


Source: NIQ Digital Purchases Data Latest 52 Weeks 20th July 2025 – Second-hand share of category sales – Average across EU5 Markets

Gen Z lead second-hand adoption.



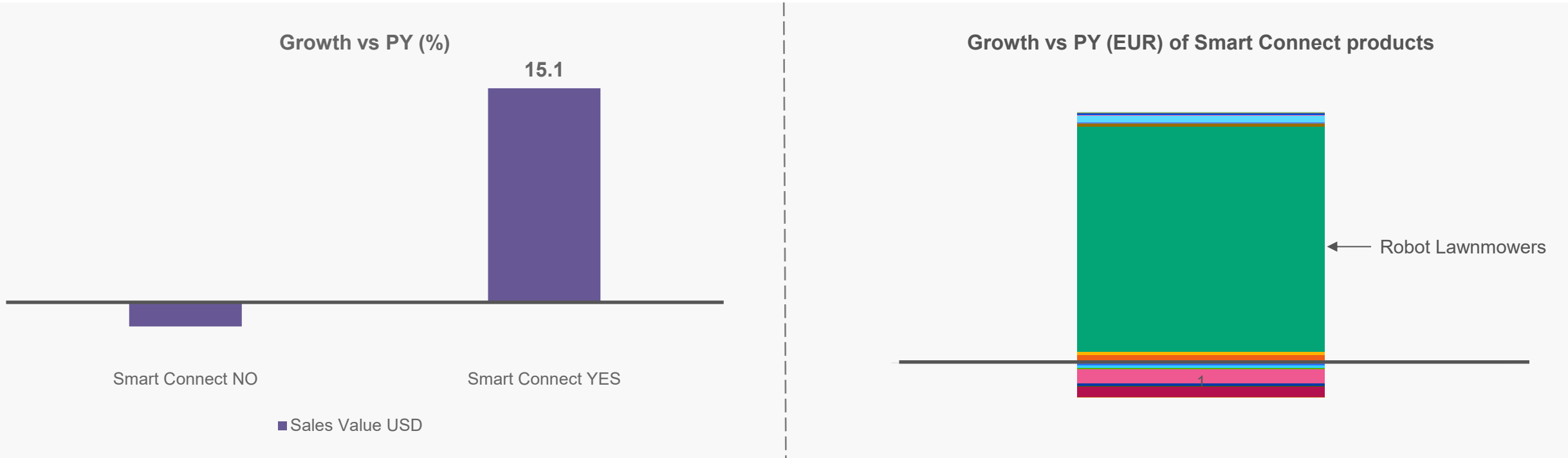
Second-Hand Share of Total Ecommerce by Generation



Source: NiQ Digital Purchases Latest 52 Weeks 13th July 2025 – France – *Selected categories where second-hand accounts for >2% of sales

Smart connect products have seen huge growth over the last year, and this is coming almost exclusively from Robot Lawnmowers.

Global | MAT to Jul 2025 | Smart Connect products

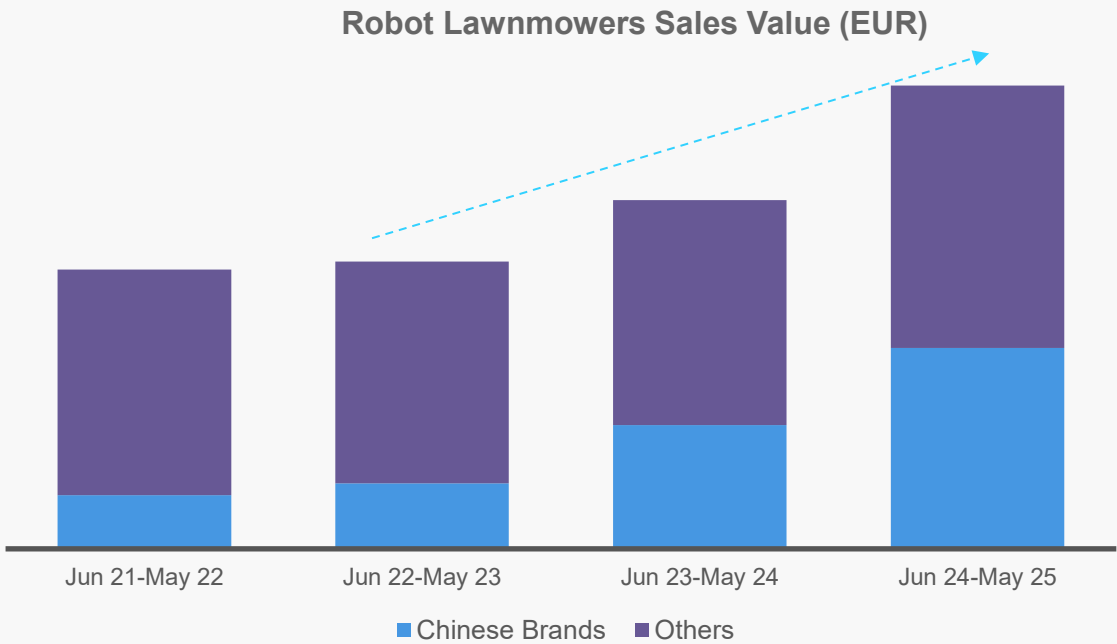


Source: Market Intelligence | Panelmarket incl. Wholesalers | Smart Connect (LED LAMPS, PROGRAM. THERMOSTATS, DOOR COMMUNICATION, DECORATIVE LUMINAIRES, INDOOR LUMINAIRES, ALERT DETECTORS, INTRUDER SECURITY, POW. LAWNMOWERS, MOVEMENT DETECTORS, OUTDOOR LUMINAIRES, PRESSURE WASHERS, WATER TIMERS, OUTDOOR GATE DRIVES, ELECT.WATER HEATERS, TUBULAR MOTORS, GARAGE DOORS/DRIVES, ELECTRIC BELT DRIVES, OUTDOOR BARBECUES, POW. PUMPS, SHOWER COMPONENTS, SWITCH/SOCK.PROGRAMS, SWING SHUTTER DRIVES, TAPS, PADLOCKS/SAFE HOOKS, GAS WATER HEATERS) | Europe (Aut, Bel, Fra, De, GB, Hun, Ita, Ned, Sui)

Robot Lawnmowers' growth has been driven primarily by a sudden influx of Chinese brands.

78% of respondents
report it's important
to have a garden

Europe | MAT to Jul 2025 | Smart Connect Robot Lawnmowers



+33%
vs PY

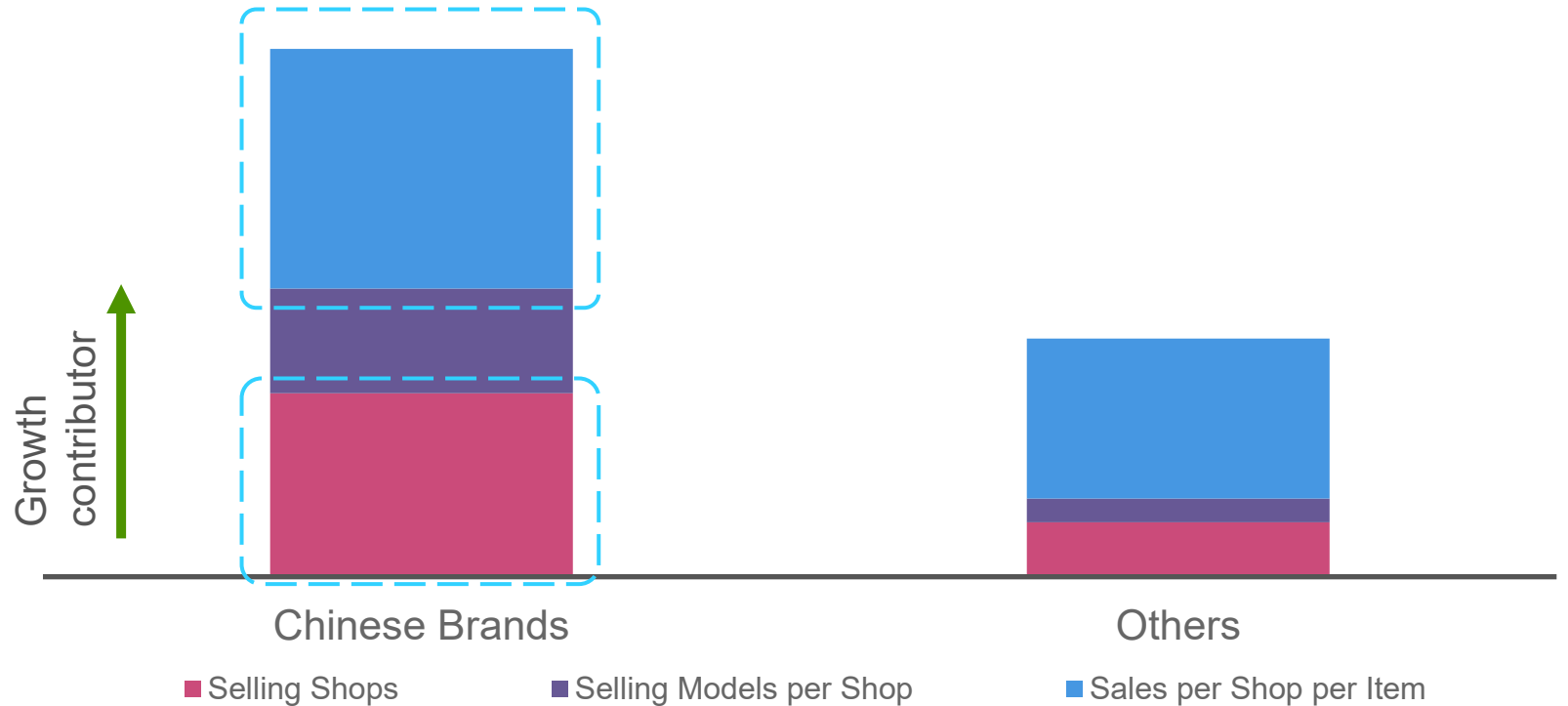
Source: Market Intelligence | Panelmarket incl. Wholesalers | Robot Lawnmowers, Smart Connect, Chinese Brands (Worx, Kress, Yard Force, Mova, Segway, Ecovacs, Dreame, Mammotion) | Europe (Aut, Bel, Fra, De, GB, Hun, Ita, Ned, Sui)
NiQ GfK Omnibus Survey 2025, DE and UK. Question 8: How important is a garden when you are looking for a place to live?

Chinese brands
have an ASP
Index of
85% compared
to
the total Robot
Lawnmowers
market

The low ASP has driven demand, partnered with a strong distribution strategy.

Europe | MAT to Jul 2025 | Smart Robot Lawnmowers | Chinese brands

Value growth vs PY by measurable (Ths. EUR)

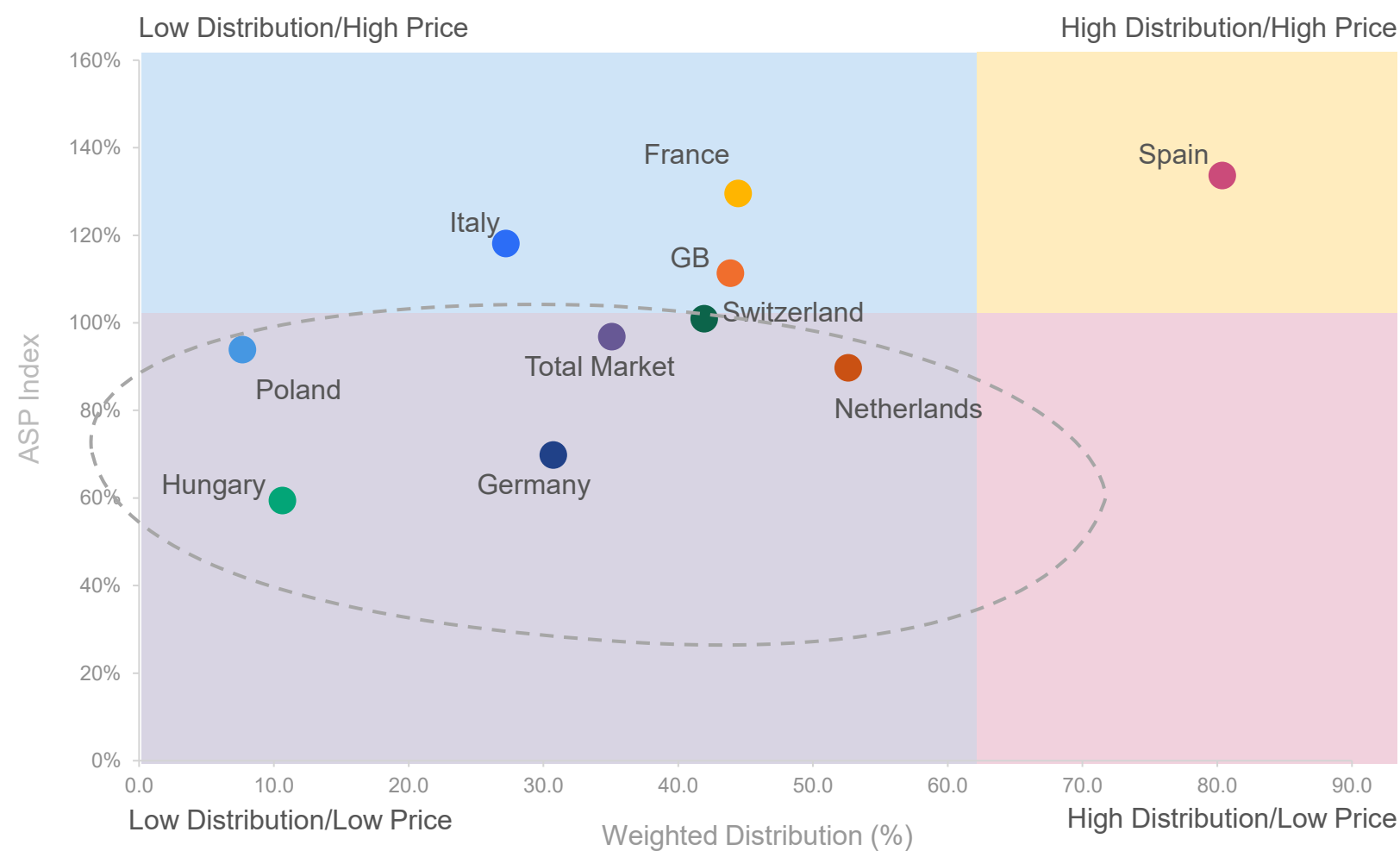


Source: Market Intelligence | Panelmarket incl. Wholesalers | Robot Lawnmowers, Smart Connect, Chinese Brands (Worx, Kress, Yard Force, Mova, Segway, Ecovacs, Dreame, Mammotion) | Europe (Aut, Bel, Fra, De, GB, Hun, Ita, Ned, Sui)

Could Cordless Power Tools be next?

Europe | MAT to Jul 2025 | Cordless Power tools 18 | Chinese brands

Chinese brands have accounted for **1.6%** of Cordless Power Tools value in each of the last 3 years



Source: Market Intelligence | Panelmarket incl. Wholesalers | Cordless Power tools 18, Chinese Brands (Worx, Kress, Rockwell, Litheli, Ingco, Devon, Dongcheng, Ken) | Europe (Bel, Esp, Fra, De, GB, Hun, Ita, Ned, Pol, Sui)

#1

The DIY industry is still as important as ever with newer generations performing home improvement, and with access to an increased variety of merchants. But the in-store experience remains important to consumers.

#2

The non-traditional online space will be an area to watch, with growth coming through digital marketplaces and re-commerce. The growth through the online channel is extremely valuable given how much more consumers are willing to spend per item.

#3

The growth of Chinese brands in Robot Lawnmowers alone has been enough to drive the growth of all Smart Home improvement products. The next growth area will certainly occur into other DIY product categories.

Need more insights?
Reach our local experts



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