



Euromonitor  
International

# The World Market for Home and Garden

June 2025

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## INTRODUCTION AND OVERVIEW

Adjacent industries and how they impact Home and Garden

## STATE OF THE INDUSTRY

Stagnation at the global level is the best-case scenario for home and garden to 2029

Demand patterns show in-home living (beyond essentials) has a reduced spend priority

Gardening spend offers the strongest growth prospects, historically and looking ahead

Home and garden real demand declined in 2024; gardening had real growth longer term

Indoor living and homewares suffers the most consistent decline in priority for spend

Spend on upkeep of homes is mixed, with decorating (painting) showing strong gains

Gardening demand gains reflect homeowner enjoyment (not socialising in the garden)

The shape of demand jumps out when looking at this across time and across regions

One macro driver for less priority of spend in the home is having guests visit less often

Price sensitivity rises; trade barriers and threats to future income will only speed this up

## COMPANIES AND PRODUCTS

Focusing on the largest 10 companies, IKEA's scale and broader coverage stands out

Top 10 companies in home and garden: Acquisitions and divestments activity (page 1)

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Top 10 companies in home and garden: Acquisitions and divestments activity summary

Company fragmentation varies greatly between regions, but is quite stable over time

Companies and brands from Asia are expanding and growing more powerful over time

## CHANNELS

Global industry distribution shows how large a change is ongoing via e-commerce

Vertical integration is one of three major drivers visible globally in channel strategy

Smaller footprint urban store experiments for chasing footfall are increasing in scale

Third-party marketplaces accelerate faster than e-commerce; visible gains in the home

## FUTURE OUTLOOK

Where is future growth forecast to come from?

The top 10 markets for cash growth in the next five years get shaken up once again

The country profile for the fastest growth categories: Decorating

The country profile for the fastest growth categories: Indoor Plants

The US market shows great turmoil in 2025, with tariffs driving strategic levels of change

Implications mapped for what was known to 13 May 2025 (including 90-day pause)

## CONCLUSION

SWOT analysis for home and garden

Key opportunities for growth and differentiation that these trends present

Our expert's view of Home and Garden to 2029

## APPENDIX

## Scope

What is included in any of the home and garden bubble chart definitions

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