



**Euromonitor  
International**

# Where Consumers Shop for Home and Garden

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Table of Contents

## INTRODUCTION

Scope

## INTRODUCTION

Key findings

## INDUSTRY SNAPSHOT

Demand for wellness products keeps the sector relevant, amid inflationary challenges

Increased focus on creating a calming habitat aids the demand for gardening products

Rise in urbanisation and gardening activities aids sales in major countries across the globe

## CHANNEL SHIFTS

Increased investment in marketplaces and omnichannel strategies aid retail e-commerce

Retail online is gaining significant traction on the back of e-commerce initiatives from brands

Marketplaces: A way to improve the consumer purchasing experience

Mathis Marketplace: Offering home and garden products seamlessly

Nitori's aggressive e-commerce investments to expand its presence across major countries

Nitori plans to exponentially increase its foothold on a global level

Global brands explore new markets through store launches to widen presence

Tramontina targets the aspirational consumer class in India, along with the horeca segment

## STORE-BASED CHANNELS

Store-based snapshot in 2023

Warehouse clubs sees strong CAGR in 2018-2023, driven by expansion and loyalty programmes

Market saturation and rising cost of living affect home improvement and gardening stores

Majority of consumers visit stores to see, try and touch products before making a purchase

Home Depot's innovative measures help it maintain the top position over the period

Homewares with a vegan touch see strong demand, driven by change in dietary preferences

Ashley Furniture sales affected as a result of data breach and store closures in major regions

Private label brand launches aid the value market for homewares and home furnishings

Importance of private label by region in home and garden

Rise in retailer activities aids value sales of private label in countries such as Argentina

Fiskars increasingly invests in DTC segment to increase consumer base across the globe

B&Q revamps its "You Can Do It" campaign to support women's involvement in DIY projects

B&Q plans to inspire confidence among women to take on home improvement initiatives

Global players expand across markets to improve presence and increase consumer base

IKEA's new store format offers design consultations and pick-up solutions in the US

XXLutz pursues acquisitions to improve its consumer base, particularly across Europe

## NON-STORE CHANNELS

Non-store snapshot in 2023

Innovative initiatives from brands and e-commerce platforms aid online value sales

Pinterest and B&Q partner to help consumers improve their homes by taking up DIY projects

E-commerce by category in home and garden

Market saturation and reopening of physical stores hampers growth of retail e-commerce

Retail e-commerce more prevalent in regions with internet access among consumers

Innovation and partnerships with major brands enable top players to maintain their positions

Majority of global consumers perceive that they will get best prices when buying online

Top brands such as IKEA focus on generative AI to improve consumer experience

IKEA and OpenAI partner up to provide consumers with an AI design assistant

Brands invest in augmented reality and e-commerce platforms to increase consumer base

## FUTURE DEVELOPMENTS

Brand innovations and rising urbanisation set to aid sales in home and garden  
E-commerce expected to witness similar growth to homewares and home furnishing stores  
Home improvement and gardening stores set to see growth, along with e-commerce  
Consumer focus on minimalistic furniture is set to be a driver for home and garden  
IKEA launches innovative ad to help consumers understand multifunctional furniture benefits  
Increased focus on child-specific furniture drives brands to launch innovative products  
Key takeaways

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