

Home and Garden in Spain

May 2023

Table of Contents

Home and Garden in Spain

EXECUTIVE SUMMARY

Home and garden in 2022: The big picture

2022 key trends

Competitive landscape

Retailing developments

What next for home and garden?

MARKET DATA

- Table 1 Sales of Home and Garden by Category: Value 2017-2022
- Table 2 Sales of Home and Garden by Category: % Value Growth 2017-2022
- Table 3 NBO Company Shares of Home and Garden: % Value 2018-2022
- Table 4 LBN Brand Shares of Home and Garden: % Value 2019-2022
- Table 5 Penetration of Private Label in Home and Garden by Category: % Value 2017-2022
- Table 6 Distribution of Home and Garden by Format: % Value 2017-2022
- Table 7 Distribution of Home and Garden by Format and Category: % Value 2022
- Table 8 Forecast Sales of Home and Garden by Category: Value 2022-2027
- Table 9 Forecast Sales of Home and Garden by Category: % Value Growth 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Home Improvement in Spain

KEY DATA FINDINGS

2022 DEVELOPMENTS

Premiumisation within kitchens sparks innovation

Dynamic growth for power tools supported by lasting DIY trend

Roca Sanitario consolidates dominance of bathroom and sanitaryware

PROSPECTS AND OPPORTUNITIES

Growth expected to stabilise for home improvement over forecast period

Supply chain disruptions to depress growth in floor covering in 2023

Growth of home improvement via e-commerce likely to slow

CATEGORY DATA

- Table 10 Sales of Home Improvement by Category: Value 2017-2022
- Table 11 Sales of Home Improvement by Category: % Value Growth 2017-2022
- Table 12 NBO Company Shares of Home Improvement: % Value 2018-2022
- Table 13 LBN Brand Shares of Home Improvement: % Value 2019-2022
- Table 14 Distribution of Home Improvement by Format: % Value 2017-2022
- Table 15 Forecast Sales of Home Improvement by Category: Value 2022-2027
- Table 16 Forecast Sales of Home Improvement by Category: % Value Growth 2022-2027

Gardening in Spain

KEY DATA FINDINGS

2022 DEVELOPMENTS

Gardening continues to enjoy strong growth Greater focus on sustainability in gardening E-commerce gardening sales remain elevated in 2022

PROSPECTS AND OPPORTUNITIES

Gardening set to experience slower growth but remain positive performer

Climate change and watering systems

Robotic lawn mowers to overtake sales of other formats by 2027

CATEGORY DATA

- Table 17 Sales of Gardening by Category: Value 2017-2022
- Table 18 Sales of Gardening by Category: % Value Growth 2017-2022
- Table 19 NBO Company Shares of Gardening: % Value 2018-2022
- Table 20 LBN Brand Shares of Gardening: % Value 2019-2022
- Table 21 Distribution of Gardening by Format: % Value 2017-2022
- Table 22 Forecast Sales of Gardening by Category: Value 2022-2027
- Table 23 Forecast Sales of Gardening by Category: % Value Growth 2022-2027

Homewares in Spain

KEY DATA FINDINGS

2022 DEVELOPMENTS

Energy crisis pushes up glass prices and causes manufacturing disruptions

Pandemic trends remain relevant within homewares

lkea extends leadership, while small manufacturers remain dominant

PROSPECTS AND OPPORTUNITIES

Some dining products set to record flat growth, while other others will be more dynamic

Tritan plastic expected to dominate food storage materials

CATEGORY DATA

- Table 24 Sales of Homewares by Category: Value 2017-2022
- Table 25 Sales of Homewares by Category: % Value Growth 2017-2022
- Table 26 Sales of Homewares by Material: % Value 2017-2022
- Table 27 NBO Company Shares of Homewares: % Value 2018-2022
- Table 28 LBN Brand Shares of Homewares: % Value 2019-2022
- Table 29 Distribution of Homewares by Format: % Value 2017-2022
- Table 30 Forecast Sales of Homewares by Category: Value 2022-2027
- Table 31 Forecast Sales of Homewares by Category: % Value Growth 2022-2027

Home Furnishings in Spain

KEY DATA FINDINGS

2022 DEVELOPMENTS

Energy crisis and regulations prompt consumers to switch to LEDs

Innovation within mattresses, including temperature regulation

Sustainability drives sales of second-hand furniture

PROSPECTS AND OPPORTUNITIES

Slow to moderate growth expected over forecast period

E-commerce to continue growing, albeit at a slower pace

CATEGORY DATA

Table 32 - Sales of Home Furnishings by Category: Value 2017-2022

Table 33 - Sales of Home Furnishings by Category: % Value Growth 2017-2022

- Table 34 NBO Company Shares of Home Furnishings: % Value 2018-2022
- Table 35 LBN Brand Shares of Home Furnishings: % Value 2019-2022
- Table 36 LBN Brand Shares of Light Sources: % Value 2019-2022
- Table 37 Distribution of Home Furnishings by Format: % Value 2017-2022
- Table 38 Forecast Sales of Home Furnishings by Category: Value 2022-2027
- Table 39 Forecast Sales of Home Furnishings by Category: % Value Growth 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/home-and-garden-in-spain/report.