



Top Five Trends in Home and Garden

June 2025

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INTRODUCTION

There are pockets of growth to find, inside an industry facing overall global stagnation

Top five trends in Home and Garden strategy

Top five trends uncovered

OPPORTUNITIES ARE ABOUT GARDENING, SEGMENTATION, OR EXPOSURE

Companies reposition their exposure, while seeking pockets of growth within saturation

The country profile for the fastest growth categories: Indoor Plants and Decorating

The gardening boom is strongest in emerging markets; but this is a driver the world over

Finding under-served potential spend is one of the growth “wins” being chased

We have been supporting the Global DIY Summit team with content around this topic

One escape from the saturation narrative is by servicing rising changes in our lifestyle

The world now includes more homes with more pets, creating new furniture needs

A saturation narrative is partly due of demographics; the birth rate is really landing now

The segment over 65+ is expanding; this must become a focus for long-term growth

Unstoppable forces meet immovable objects - who can accept a saturation narrative?

GO-TO-MARKET NEEDS EXPANDING CONTROL, RESILIENCE AND AFFORDABILITY

Relationships based on win-win in value chains were sorely tested for the last five years

Leroy Merlin allies with Chinese company Positec to extend its private label range depth

Tempur Sealy adopts a hybrid business model via an acquisition strategy in US/Europe

The formula for “affordability” will likely reward durability at all price points in 2025-2026

Hybrid manufacturing and retail business models give rise to more resilient value chains

SMALL SPACES AND ELEVATED EXPERIENCES DRIVE DIFFERENTIATION

Making the most of what we have at home has both pragmatic and emotive angles to it

Multifunctional furniture is about making the most of available smaller spaces

Sofas are one of the most common SKU types for designs overhauling the use of space

Multifunctional increasingly means technology being integrated, not just storage

Riedel's “The Key to Wine” tasting kit embodies consumption as guest entertainment

Technology to improve our sleep experience is also increasingly integrated in mattresses

Tempur Sealy has created a mass-scale luxury product trial experience in a novel way

These were niche topics a few years ago; they fast now turn into needed “tickets to play”

TECHNOLOGY INVESTMENTS FOCUS ON MARKETPLACES AND AI UPGRADES

Marketplaces mean much more effort needs to go into standing out against the noise

As a brand, standing out becomes much harder once a marketplace is up and running

AI increasingly assists the inspiration, evaluation and selection aspects of the journey

GenAI as a room design service continues to evolve with Wayfair's launch of Muse

Marketplace data allows studying best practice for conversion across the sales journey

Marketplaces are extreme Darwinian environments; fail fast is part of the territory

SECOND-HAND GROWS, WHILE GOOD SUSTAINABILITY PROGRAMMES EXPAND

Second-hand was rising, but we think tariffs are boosting this to be even faster in the US

Maisons Du Monde has been forced into second-hand products in France by lost share

Second-hand enters mainstream retail strategy by visibly taking footfall and sales

Peer-to-peer marketplaces for second-hand are blending free and paid reuse of product

Leroy Merlin's Home Index continues to expand from France - this is moving the needle

IKEA's investment in renewable energy grows, continuing to stand out from the crowd

Second-hand rising provides layers of profitable gain as brands discover all the impacts

CONCLUSION

Future implications

Key opportunities for growth and differentiation that these trends present

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