



Flanders
State of the Art



DIY MARKET

IN SWEDEN

FLANDERS INVESTMENT & TRADE MARKET SURVEY

November 2019

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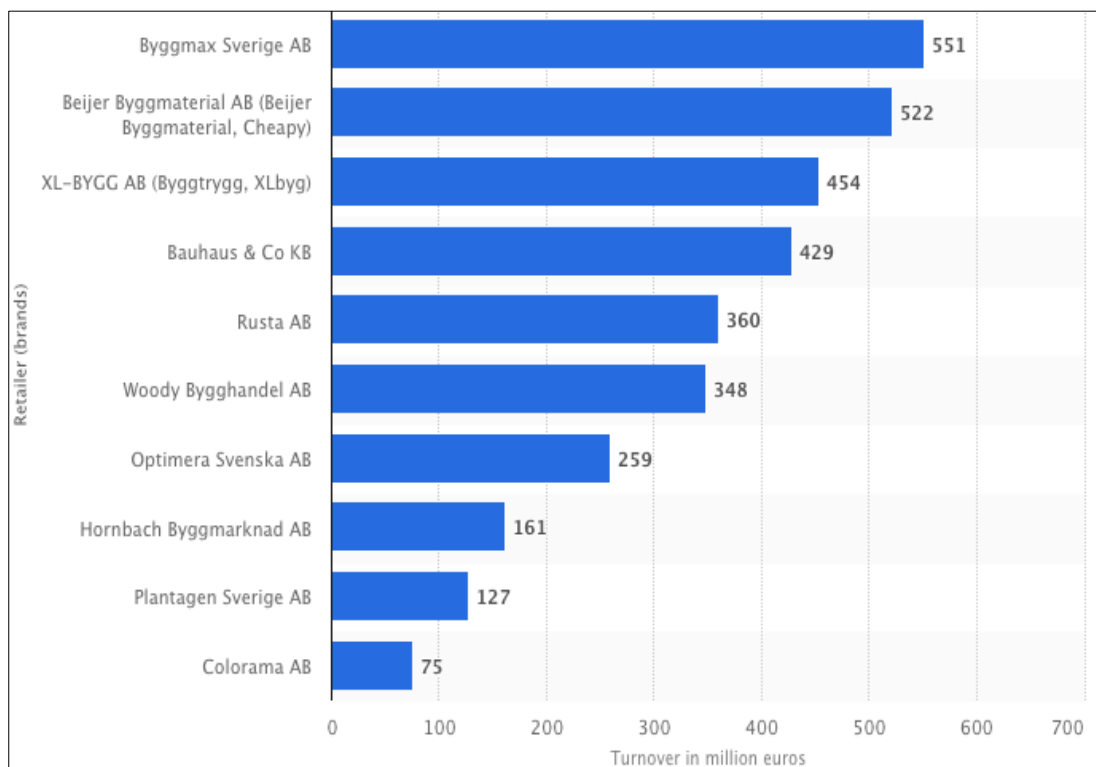
1. SECTOR IN BRIEF

In Sweden, households continue to invest more money in renovating their homes. The largest store brands increased sales more than the industry index. However, K-Rauta AB nor Skånska Byggvaror has succeeded in reversing the trend.

Building materials retailers and H.U.I.'s ((Swedish Institute of Retail) annual statistics for 2018 show that sales increased by 2.8% at current prices compared to the previous year - thus confirming the trend of a slower growth rate since 2015, when many households completed renovation and rebuilding work before the tax deduction on such services were lowered from 50% to 30%. In addition, 2.8% is the lowest sales increase in the building and iron trade since 2013.

The trend was somewhat more favourable for the 30 largest companies and store brands in terms of sales, which offer products and services in housing maintenance. Net sales increased by 3.9% to over 61 billion SEK, and, in addition, the overall operating profit improved to 2.3 billion SEK or a margin of 3.8%.

Bygghuset and Beijer Bygghuset continue to top the sales list, driving their revenues by 5.6% and 6.3%, respectively, compared with the previous year. At the same time, both constellations strengthened operating profit and reported operating margins of 4.5% and 3%.



Source: www.statista.com

This statistic shows the leading DIY and gardening retailers in Sweden as of 2018, by turnover. According to the source, Bygghuset was the largest DIY retail company in Sweden, based on its turnover

of 551 million euro. Compared to that, the second largest DIY and gardening retailer was Beijer with its chains Beijer Bygghem and Cheapy, with a turnover of 522 million euro.

2. DIY/ BUILDING MATERIALS CHAINS

1. Bygghem



Bygghem is a Swedish construction chain founded in 1993. This company consists of more than 140 stores throughout Sweden, Norway and Finland. Bygghem has its headquarters in Sweden, they work with a 'drive-in concept' where the customer drives his car inside and loads what is needed. This lowers the price.

Revenue (2018):	5,1 billion SEK
Operating result (2018):	162 million SEK
Profit after tax (2018):	138 million SEK
Assets (2018):	3,3 billion SEK

Headquarters Sweden:

Armégatan 38
171 71 Solna

T +46 8 514 930 60

www.bygghem.se/

2. Beijer



Beijer Bygghem AB is a Swedish nationwide building trade chain, located in 60 locations, from Kiruna in the north to Malmö in the south. The company's customer groups are large and small construction companies as well as private individuals. The company has sales of approximately 5 billion SEK and has around 1,200 employees. Beijer is part of the Wolseley Group with operations in Europe and North America.

The trading company Firma G Beijer was founded in 1866 in Malmö by Gottfried Beijer. In 1894, Waldemar Beijer started a branch in Stockholm, which became a separate company in 1904.

In 2009, 3 building warehouses were acquired from Silvan, those in Malmö, Halmstad and Gothenburg.

Headquarters Sweden:

Kuskvägen 2
191 62 Sollentuna

T +46 75 241 30 00

www.beijerbygg.se/privat

3. XL-BYGG AB



XL-BYGG is a nationwide chain of about 70 freelance builders in Sweden. Together with XL-BYG in Denmark and XL-BYGG in Norway, they form Scandinavia's largest construction retail chain with a total of just under 300 builders.

In Sweden, the chain has existed since 2009 and is run by the service organization XL-BYGG AB. In 2016, XL-BYGG started e-commerce under the concept XLHemma.se in collaboration with Bygghemma.se.

Some of the major partners in the chain:

Norrby Trä & Byggvaror AB
Hans Anders Bygg AB

XL-BUILDING Stenvalls AB
Revenue (2016): 7,4 billion SEK

Headquarters Sweden:

Packstensgränd 25
16250 Vällingby

T +46 84455200

www.xlbygg.se/

4. Bauhaus



Bauhaus is a German do-it-yourself department store and was established in Germany in 1960. The Swiss-headquartered pan-European retail chain offers products for home improvement, gardening and workshop. It has 250 stores and franchises across Europe including 21 stores in Sweden.

In Sweden there are stores in Gothenburg, Hyllinge, Kalmar, Linköping, Löddeköpinge, Malmö, Norrköping, Stockholm, Sundsvall, Uddevalla, Uppsala, Västerås and Örebro. The largest Bauhaus store in Sweden (seen from the surface) is Västerås, whose drive-in is the largest in the Nordic region.

Headquarters Sweden:

Enköpingsvägen 41
177 38 Järfälla

T +46 20 120 20 30

www.bauhaus.se/

5. Rusta



Rusta AB is a Swedish retail company, founded in 1986, that sells products for home, both inside and outside. The chain has more than 150 department stores over Sweden, Norway, Germany and Finland, whereas 93 of them are located in Sweden. In the stores of Rusta, you can find a wide range of products at a low price. Rusta is also its own importer and wholesaler.

Headquarters Sweden:

Kanalvägen 12
194 61 Upplands Väsby

T +46 8 626 43 00

www.rusta.com/se/

6. Optimera



Optimera is a Swedish construction retail chain for professional customers and has around 50 building warehouses in Sweden and its headquarters in Malmö. Optimera has around 800 employees and has a turnover of approximately 3.3 billion SEK.

Optimera is also active in Norway, Estonia and Latvia and is owned by the French group Saint-Gobain.

Optimera as a brand was established in 1996 in connection with a merger of four different players in Norway and Sweden. Saint-Gobain, acquired since the Optimeragruppen in 2005. The Optimeragruppen has since grown in the Nordic market and today, together with Dahl Sverige AB, is part of the Saint-Gobain Distribution Nordic division.

Headquarters Sweden:

Cederströmsgatan 1
212 39 Malmö

T +46 40 692 37 00

www.optimera.se/bygghandel/proffs

7. Hornbach



Hornbach is a retail chain in the form of a family business, founded in 1877, which today comprises more than 150 hardware stores throughout Europe. The department stores are located in Germany, Austria, Switzerland, Luxembourg, the Netherlands, the Czech Republic, Sweden, Slovakia and Romania.

Hornbach differs from other similar department stores in that they never have timed offers or special prices for regular customers. This is, to quote Hornbach Botkyrka's department store manager Olle Boredahl, "so that our customers can plan their finances in the long term to be able to afford and realize their projects".

The head office of Hornbach is located in Bornheim at Landau in der Pfalz (Germany), near the place where the company's history once began. The Group's Scandinavian head office is located in Gothenburg, Sweden.

Headquarters Sweden:

Aröds industriväg 66
422 43 Hisings Backa

T +46 31 779 92 00

www.hornbach.se/

8. Bygghemma Group



Bygghemma Group First AB ("Bygghemma Group") is one of the Nordic region's largest online stores in construction products, homes and gardens. It was founded in 2006 by Patrik Rees and Anders Falk. In total, the Group has over 1,000 employees and its head office is located in Malmö. The Chairman of the Board is Henrik Theilbjørn and the CEO is Martin Edblad.

The company has rapidly grown into a hardware store with 12 online stores and 12 showrooms in Sweden. Their business concept is to market a wide range of home improvement products online at

competitive prices with home delivery. Bygghemma Group's target group is primarily private individuals who want to buy construction products from well-known brands at attractive prices.

Headquarters Sweden:

Hans Michelsensgatan 9
211 20 Malmö

T +46 20-25 00 25

www.bygghemma.se/

9. Bygma



Byggma ASA (Byggma Group) is a Norwegian supplier of construction products to retailers and consumers. Byggma was founded in 1997 for sales and marketing in Norway and was directly listed on the Oslo Stock Exchange.

Byggma ASA is headquartered in Vennesla Vest-Agder. They have about 635 employees in the Byggma Group in total. Byggma ASA owns the production companies Forestia, Huntonit AS, AS Uldal, Masonite Beams AB, Scan Lampor AS and Aneta Belysning AB and the sales companies Huntonit AB in Sweden.

Byggma ASA is one of the leading suppliers of building materials and construction products to all chains in Norway as customers. Byggma ASA had revenues of approx. 1.6 billion in 2017.

<https://byggmagroup.se/>

Headquarters Norway:

Postboks 21
Venneslaveien 233
4701 Vennesla
Norway

Byggmagroup in Sweden:

Byggmagroup Sverige AB:
Sales and marketing manager:
Stefan Öijerholm
T +46 (0)767 234 293

District manager
Anders Sjöström - Northern Sweden
M +46 (0)70-513 05 26
T +46 (0)930-399 00

District manager
Jimmy Andersson - Central Sweden
M +47 (0)70-340 56 80
T +46 (0)930-399 00

10. Bolist



Bolist AB is a chain in the hardware and construction trade that was started in 1998 by 42 iron traders.

The chain currently consists of 201 stores from north to south and has its own central warehouse (Bolist Logistik AB) in Helsingborg. Bolist also sells goods via bolist.se with delivery in stores.

Over time, the company's role has evolved to, in addition to negotiating agreements with suppliers for the member stores, also assist with marketing, IT support, training and store development. The member stores are marketed under the Bolist brand. The company also owns the rights to the Järnia brand.

Headquarters Sweden:

Ranhammarsvägen 20C
168 67 Bromma

T +46 8 37 88 20

<https://bolist.se/>

11. Woody Bygghandel



Woody Bygghandel is a construction retail chain that has over a hundred stores in Sweden. Woody is Sweden's oldest construction trade chain. It was founded on October 20 in 1944. The chain is owned by a number of local building materials dealers and has over 100 factories in Sweden and Åland. The head office is located in Helsingborg.

Headquarters Sweden:

La Cours gata 4
252 31 Helsingborg

T +46 42 38 05 50

www.woody.se/

12. Järnia



Järnia, actually 'Järniakedjan AB', is a Swedish retail chain, which originally consisted of a number of individual hardware stores around the country, but which now has an expanded range and sells products in the household, garden, tools and paint sectors. Today, the Iron Chain is 100% owned by free traders. The chain has around 40 stores all over Sweden.

Headquarters Sweden:

Klangfärgsgatan 10
426 52 Västra Frölunda

T +46 31 385 00 00

<https://jarnia.se/>

13. Clas Ohlson



Clas Ohlson is a Swedish hardware store chain and mail-order firm that specialises in hardware, home, leisure, electrical and multimedia products. It is one of the biggest of its type in Scandinavia, with more than 200 Clas Ohlson stores as of October 2013. Stores also exist in Norway, Finland, the United Kingdom, Germany and Dubai. Many of the products sold in the stores are own-label items. The company uses the house brands of Asaklitt (luggage and travel ware), Capere (bathroom supplies), Cocraft (DIY tools), Cotech (electrical tools), Coline (household electrical items), Exibel (household electrical items) and Northlight (lighting).

Headquarters Sweden:

Idrottsvägen 28
793 85 Insjön

T +46 247 445 00

www.clasohlson.com/se/

3. TRADE FAIRS

There are some interesting trade fairs that could be visited in order to receive more information and learn about the DIY sector in Sweden.

1. Nordbygg



Northern Europe's largest trade fair about construction and real estate is called 'Nordbygg' and is held at Stockholmsmässan in Sweden every year.

www.nordbygg.se/

2. BYGGMässa Öresund

BYGGMÄSSA Öresund

Another trade fair that is about the building sector, is held in the third largest city of Sweden, in Malmö. BYGGMässa Öresund usually takes place in April-May.

Note: The last edition of BYGGMässa Öresund was in 2017.

www.digisilkroad.com/exhibition/info/2457/byggm%C3%A4ssa-%C3%B6resund-malm%C3%B6

3. Underhållsmässan



Underhållsmässan is Europe's no. 1 maintenance trade fair and also takes place in Gothenburg, Sweden's second largest city. It takes place every year in the Svenska Mässan.

<https://en.underhall.se/>

4. FLIGHTS TO SWEDEN

Brussels Airlines: www.brusselsairlines.com/en-be/

Scandinavian Airlines: www.flysas.com/be-en/

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