

European Home Improvement Monitor Q3 2026

Branding - Evolution of private labels

USP Marketing Consultancy

Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Country Overview

Home Improvement per Category

Appendix



Key insights – Market Outlook

1

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

2

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

3

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

4

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.



Key insights – Evolution of private labels

1

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

2

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

3

Lorem ipsum dolor sit amet, consectetuer adipiscing elit
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.



Strategic implication

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Bottom line: Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.



Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Country Overview

Home Improvement per Category

Appendix



About European Home Improvement Monitor

RESEARCH OBJECTIVE

To track behaviour and trends in the European home improvement market, conducted 4 times a year with 6,600 online interviews per quarter across 11 major European markets.

THE RESEARCH TOPICS

Base part: European home improvement market developments, including product category penetration, spending, and brand selection timing.

QUARTERLY THEME PART TOPIC IN 2026:

Q1: Orientation & usage of new digital tools
Q2: Buying behavior & decision journey
Q3: Branding & private labels
Q4: DIY vs DIFM & expectations on services

PROJECT TEAM



Valentino Vlahovic
Project Manager
vlahovic@usp-mc.nl



Reinier Zuydgeest
Managing Consultant
+31 6 2693 6109
zuydgeest@usp-mc.nl



Dirk Hoogenboom
Research Consultant
+31 6 5209 8924
hoogenboom@usp-mc.nl

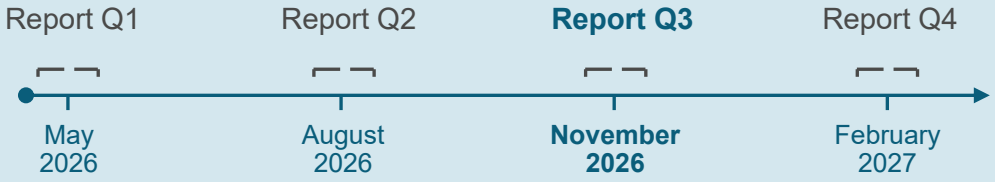
COUNTRY SCOPE



600 online interviews per quarter per country among consumers
Annually, **26,400** successful online interviews

Insights are provided for **11** European countries

THE TIMELINE



Methodology

INCLUDED CATEGORIES OF THE RESEARCH

Adhesives & Sealants	Bathroom products	Decorative products	HVAC	Paint Supplies	Power Tools	Roof daylight	Security & Safety	Constructive	Electrical
Sealants	Bath	Flooring products	Airconditioning	Fillers	Drill	Dormer windows	Locks	Insulation	Switches and sockets
Tile adhesive	Bathroom furniture	Paint	Boiler (Central heating system)	Safety products (e.g., masks or respirators)	Electrical saw	Roof windows	Security camera	Gypsum boards	
	Shower enclosures	Wallpaper	Ventilation	Sandpaper	Electrical screwdriver		Smoke alarm or fire alarm		
	Shower set/ shower head	Window decoration		Tapes	Hammer drill		Home automation systems		
	Shower tray				Sander				
	Taps & mixers								
	Toilet								
	Washbasin								
	Whirlpool								
	Shower drain (for tiled shower floor)								

Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Country Overview

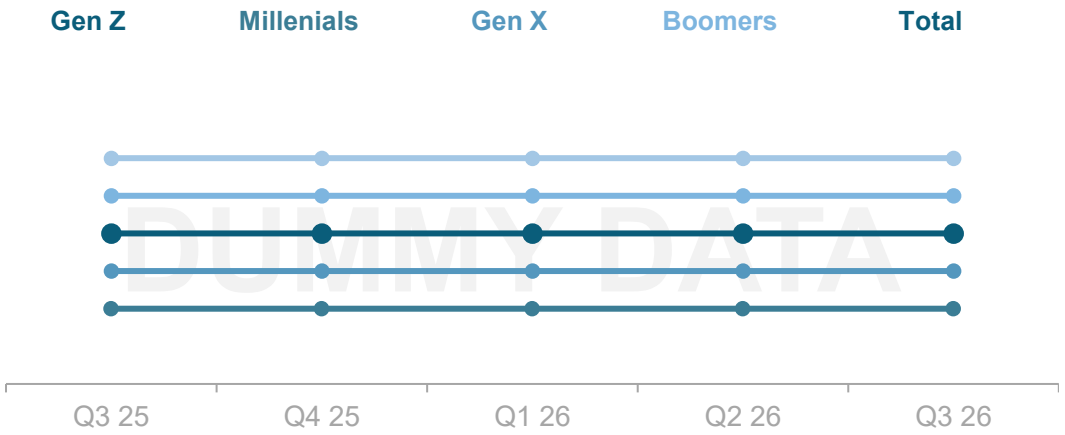
Home Improvement per Category

Appendix



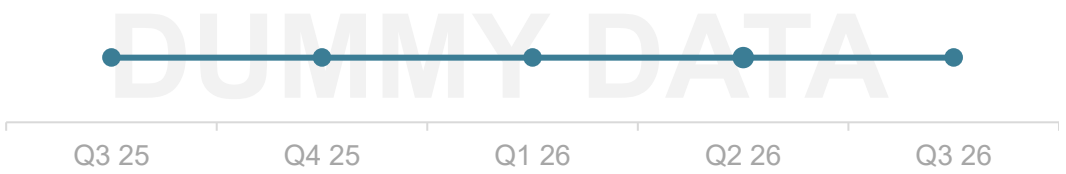
HOME IMPROVEMENT: ACTIVITY & SPENDING

Share of Households Doing Home Improvement Jobs



Q: Have any changes been made to the inside/ outside of your home in the last 3 months?

European Home Improvement Spending - Total market spending (€bn)



Q: Could you give an estimation on your spending on home improvement in the past 3 months? Spending includes only home improvement jobs costing less than €20K.

Note: Due to the natural variability of spending data, results should be interpreted directionally, with greater focus on overall trends and line movements rather than exact figures.

DUMMY DATA

Lorem ipsum dolor sit amet.

- Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

Lorem ipsum dolor sit amet.

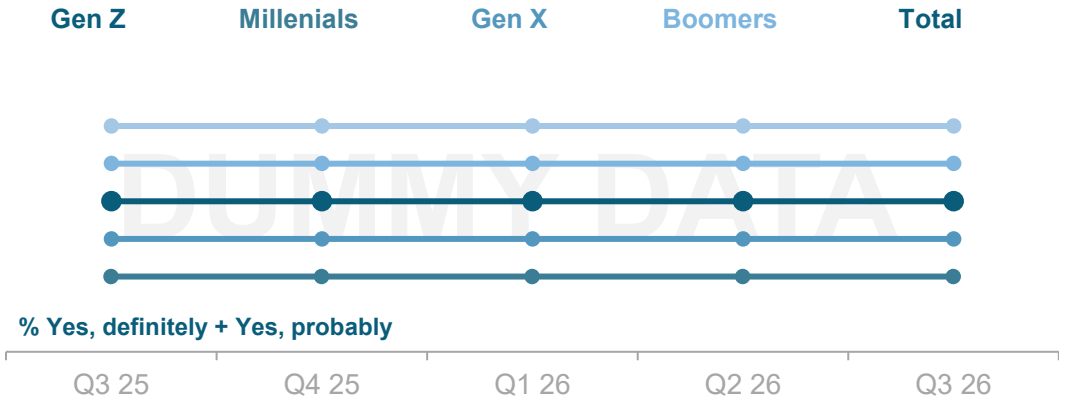
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

Lorem ipsum dolor sit amet.

- Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

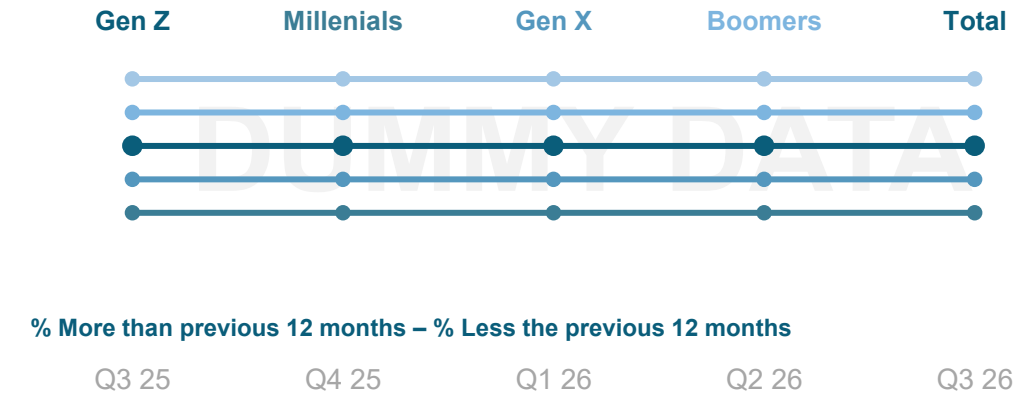
HOME IMPROVEMENT: FORECAST

Plans To Start A Home Improvement In The Next 30 Days



Q: Are you planning to start a home improvement, repair or maintenance project in the next 30 days?

Balance of Expected Spending – Next 12 Months



Q: To what degree do you expect to spend more or less money on home improvement in the next 12 months compared to the same period last year?

European Home Improvement Monitor Q3 2026

Lorem ipsum dolor sit amet.

- Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

Lorem ipsum dolor sit amet.

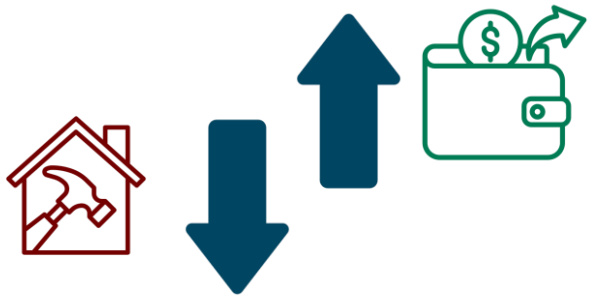
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

Lorem ipsum dolor sit amet.

- Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

*More data available in the appendix

SUMMARY: HOME IMPROVEMENT TRACKER



- Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.



- Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.



- Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Branding – Evolution of private labels

Country Overview

Home Improvement per Category

Appendix



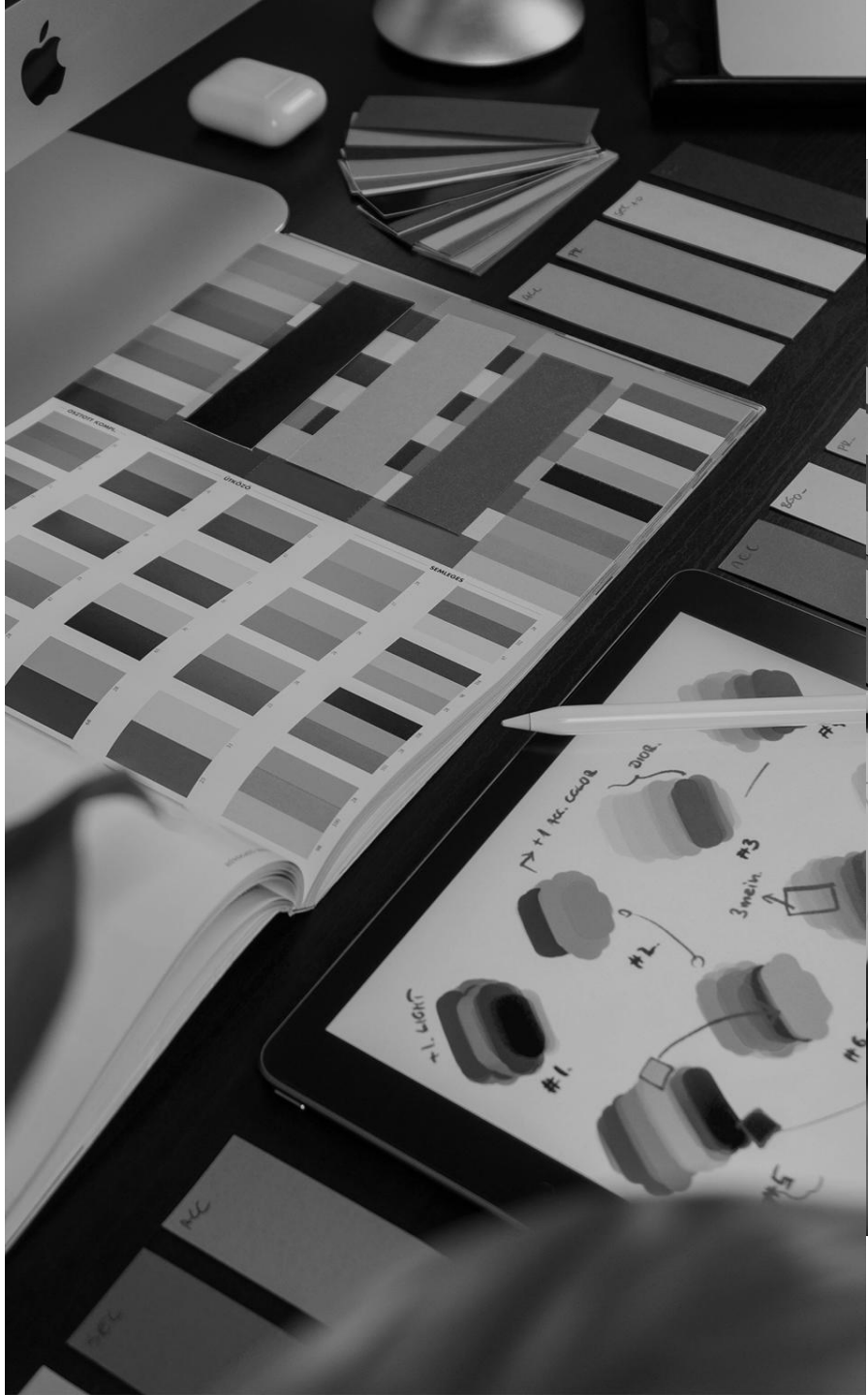
BRANDING - EVOLUTION OF PRIVATE LABELS

In this chapter, we examine how consumers in the DIY and home-improvement sector evaluate and choose between A-brands and private-label alternatives. We explore how perceptions of quality, price, trust, and retailer credibility shape private-label purchasing decisions in today's market.

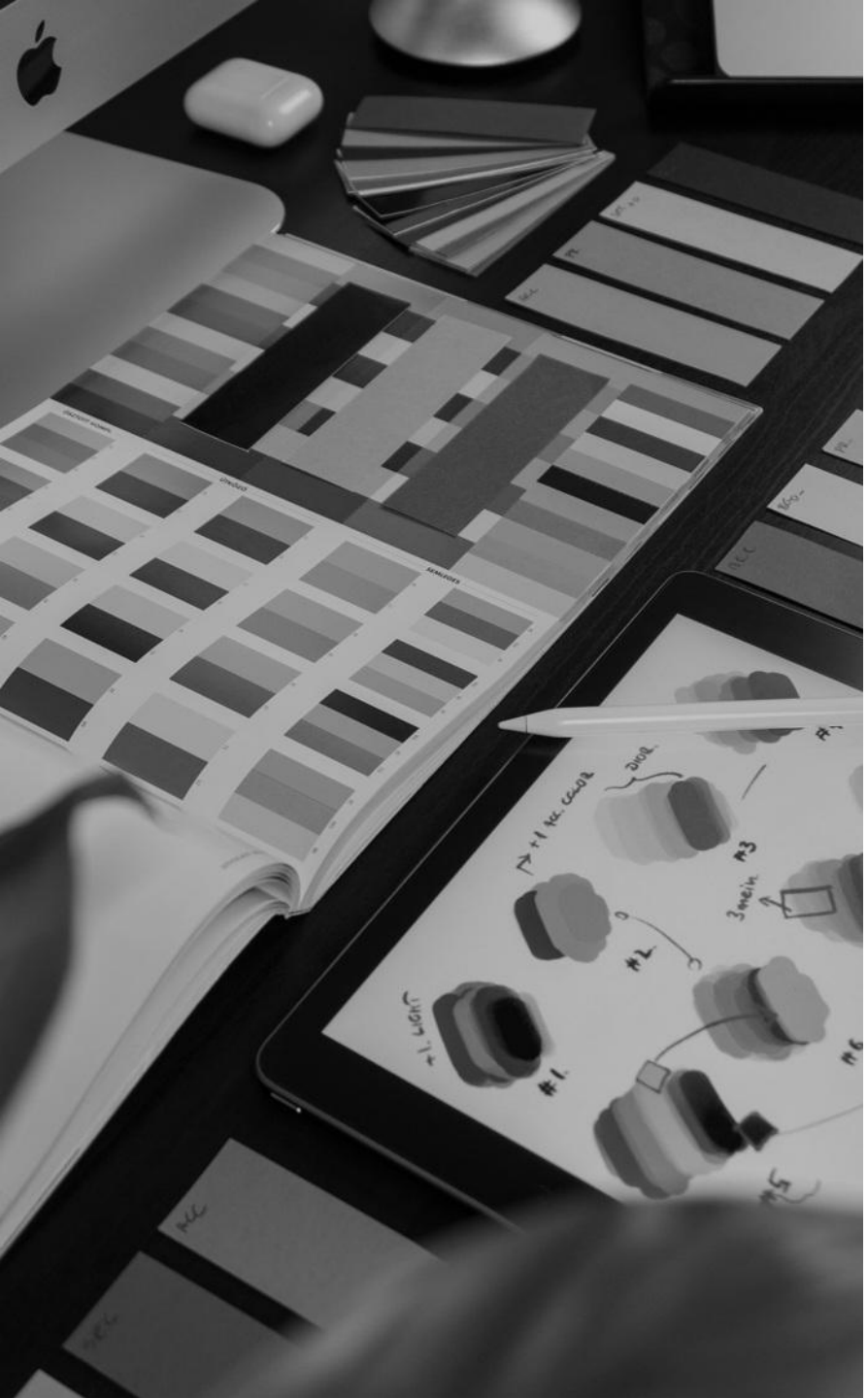
Additionally, we assess the presence and strength of private labels across different product categories. To ensure a balanced view, we also analyze how consumers rate leading DIY retailers and A-brands within these categories.

Private label momentum: Private labels continue to strengthen their position in European retail, reaching 39.5% value share across 17 markets in 2026, up slightly from a year ago. Consumer adoption is also growing, with 55% of Europeans reporting that they buy more private-label products than ever before.[1] [2]

A-Brand vs. private label dynamics: Private labels are increasingly competing with established manufacturer brands on more than price alone. Growing consumer confidence in their quality and value, combined with continued innovation and premiumization, is strengthening their position as credible alternatives to A-brands.[1]



*1 - NielsenIQ, Private Label Power in Western Europe, October 2025
*2 - PLMA / NielsenIQ, Private Label Today, MAT W28 2026
Note: These external figures refer to the broader European retail market and are provided as contextual indicators.



Theme questions

In this chapter, we take a deeper dive into home improvement brands and private labels. The respondents were asked the following:

- Private labels and home brands (or own-brands) are regularly offered in DIY stores as an alternative to the A-brands. Usually these products are cheaper due to lower marketing costs for these brands. What's your opinion on these home-brands (or own-brands) in DIY stores?
- When buying home improvement products, which do you generally prefer?
- What are the main reasons you would choose a retailer/private-label product instead of a well-known manufacturer brand?
- What are the main reasons you would choose a well-known manufacturer brand instead of a retailer/private-label product?
- If a retailer's own-brand product appears to offer the same specifications and quality as a well-known manufacturer brand, which would you choose?
- Does a strong reputation of the retailer make you more willing to buy its private-label products?
- What could convince you to switch from your usual A-brand to a private-label alternative?
- What could convince you to switch from a private-label product to a well-known manufacturer brand?
- Do you expect to buy more or fewer private-label home improvement products in the next 2–3 years?
- In which of the following categories would you prefer an A-brand over a homebrand?
- Which of the following brands for *product category* have you ever heard of?
    - *Covered product categories*: adhesives and sealants, bathroom products, fillers, paint, power tools, roof windows, switches and sockets, tapes, and taps
- How would you rate the following *product category* brands in general?
- Can you tell for the following statements how well it applies to the *product category* brand(s) on a scale of 1 to 10?
    - *Rated statements*: This brand has the best quality of products, This brand offers the best overall value for money, This is a brand that I trust, The products from this brand are easy to use, The products from this brand have an attractive design
- Which of the following *product category* brands do you currently have in your home?

Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

DUMMY DATA

Private-label sentiment

Q: Private labels and home brands (or own-brands) are regularly offered in DIY stores as an alternative to the A-brands. Usually these products are cheaper due to lower marketing costs for these brands. What's your opinion on these home-brands (or own-brands) in DIY stores?



Generational differences: Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

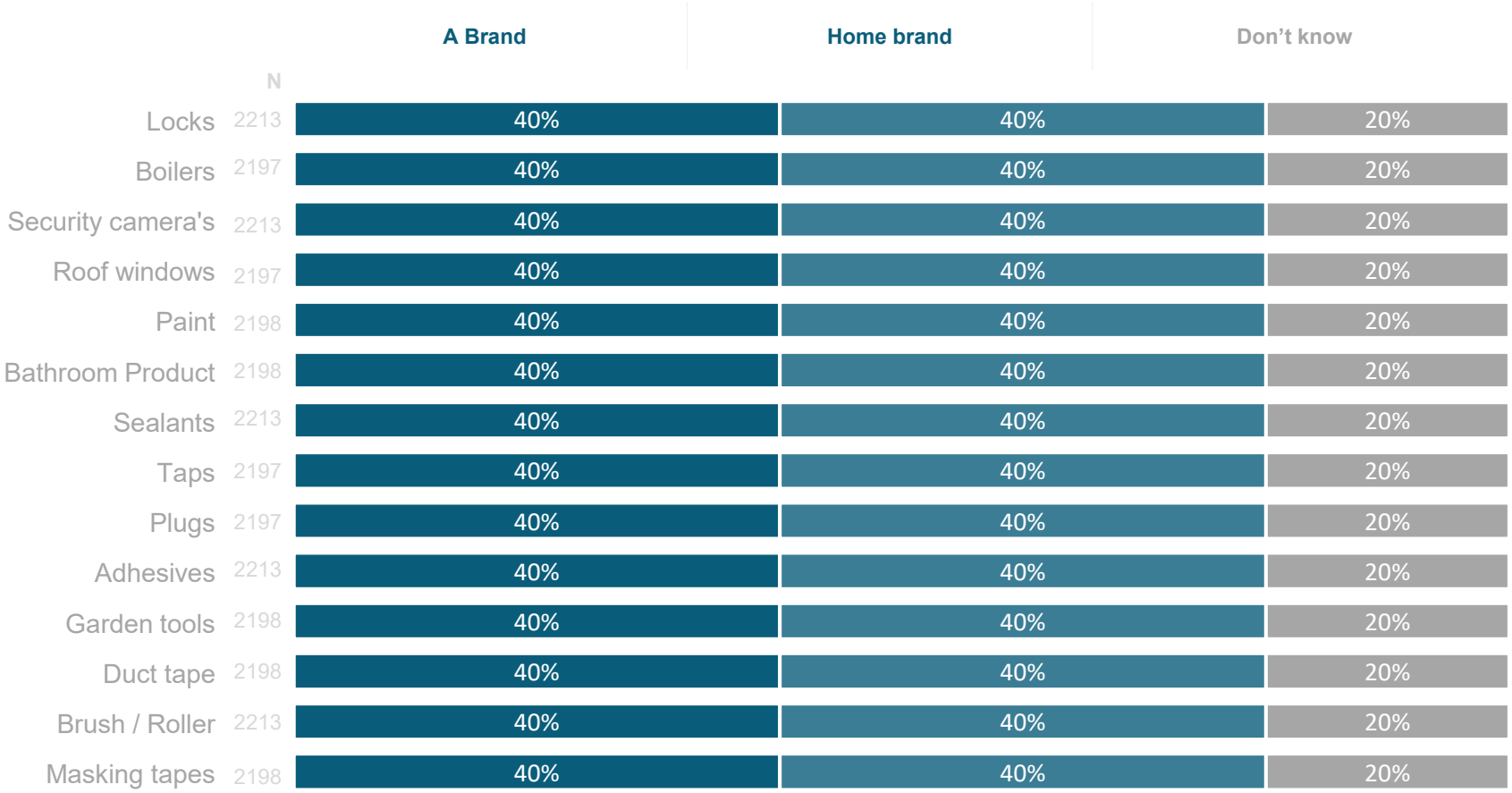
DIY experience: Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

Lorem ipsum dolor sit amet, consectetuer adipiscing elit.

DUMMY DATA

A-brand vs. private-label preference by category

Q: In which of the following categories would you prefer an A-brand over a homebrand?



Summary: Branding - Evolution of private labels

Key findings:

- Lorem ipsum dolor sit amet, consectetuer adipiscing elit
  Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit
  Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit
  Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.
- Lorem ipsum dolor sit amet, consectetuer adipiscing elit
  Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.



Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Country Overview

Home Improvement per Category

Appendix



Country

DUMMY DATA

Private-label preference across measured product categories
When buying home improvement products, which do you generally prefer?

Category-based preference for private labels (%)



2024	2025	**2026**
20%	30%	**40%**

Note: randomized question, „don’t know” answer option excluded from the analysis

Private labels sentiment
What's your opinion on these home-brands (or own-brands) in DIY stores?

Balance: **% Positive** minus **% Negative**
Positive value denotes positive opinion, negative value denotes negative opinion



2024	2025	**2026**
20%	30%	**40%**

Base: all respondents

Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Country Overview

Home Improvement per Category

Product Category

Appendix



Importance of four aspects on general brand rating

DUMMY DATA

Total overview

In order to identify factors that explain general satisfaction with a certain brand, a multiple linear regression model was built. The model estimates how several factors are associated with general satisfaction, while holding the other factors constant.

We look at two main statistical outputs of the model: R^2 and beta (β) coefficients.

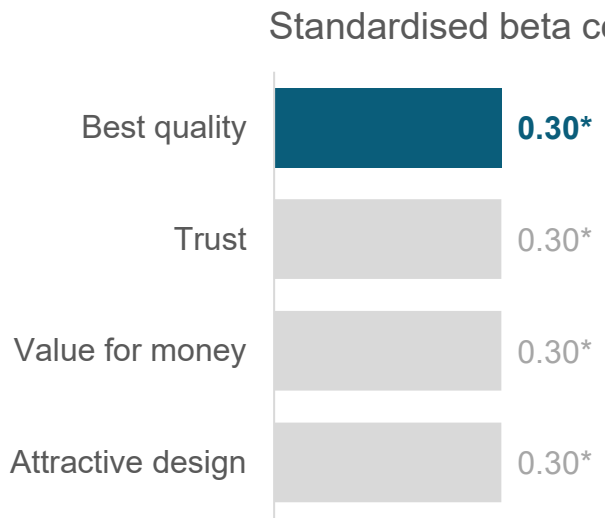
R shows how closely the model's predicted scores match the actual outcome. The closer R is to 1, the stronger the overall relationship. **R^2 shows how much of the variation in the outcome can be explained by all predictors in the model together.**

β coefficients are used to compare relative predictor strength. They do not represent the predictor's unique percentage contribution. Instead, **they indicate how strongly each factor is associated with general satisfaction, while taking the other factors into account.** Larger beta values indicate factors that have a stronger relationship with the outcome.

In short, these values answer 2 questions:
R^2 = "How much does the model explain?"
β = "Which factors are most strongly related to the outcome?"

$R^2 = 0.75$

$R^2 \times 100$ = % of variance in General rating explained by the full model



*Statistically significant. Statistical significance indicates whether there is sufficient evidence that the relationship between a factor and the outcome is real rather than just a result of random variation in the sample.

Best Known Product Brands 2026

Country overview

No.1 brand per country

Q: *Which of the following **product category** brands have you ever heard of?*

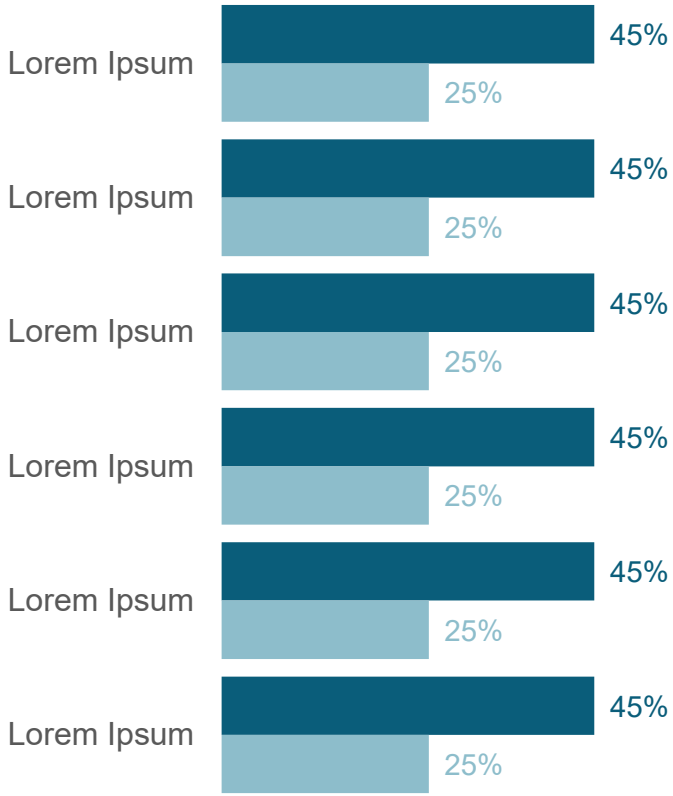


Country overview

Brand familiarity

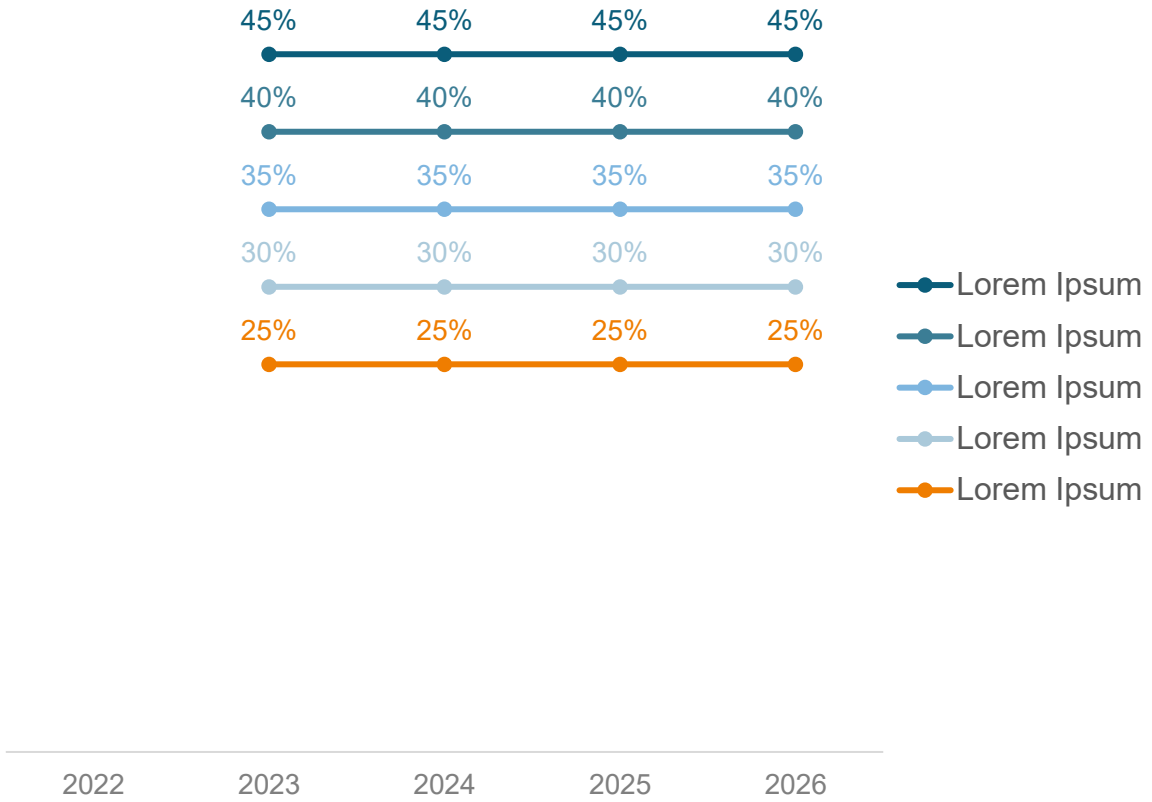
Aided awareness and usage

Q: *Which of the following **product category** brands have you ever heard of?*
Q: *Which of the following **product category** brands do you regularely use?*



Aided awareness development [top 5 brands]

Q: *Which of the following **product category** brands have you ever heard of?*



N: XY | *Brands with awareness <5% not shown on the graph*

Index

Management summary

About the Research

Home Improvement Tracker

Theme Part

Country Overview

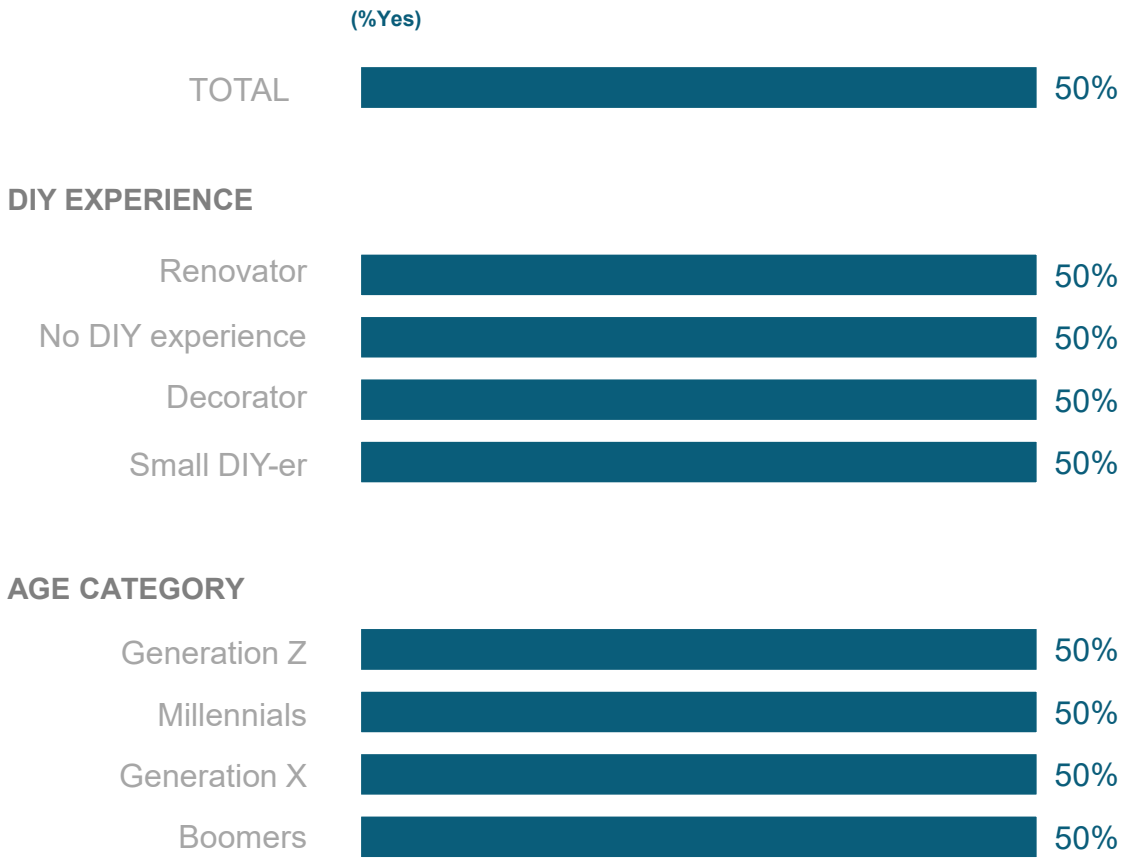
Home Improvement per Category

Appendix



Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

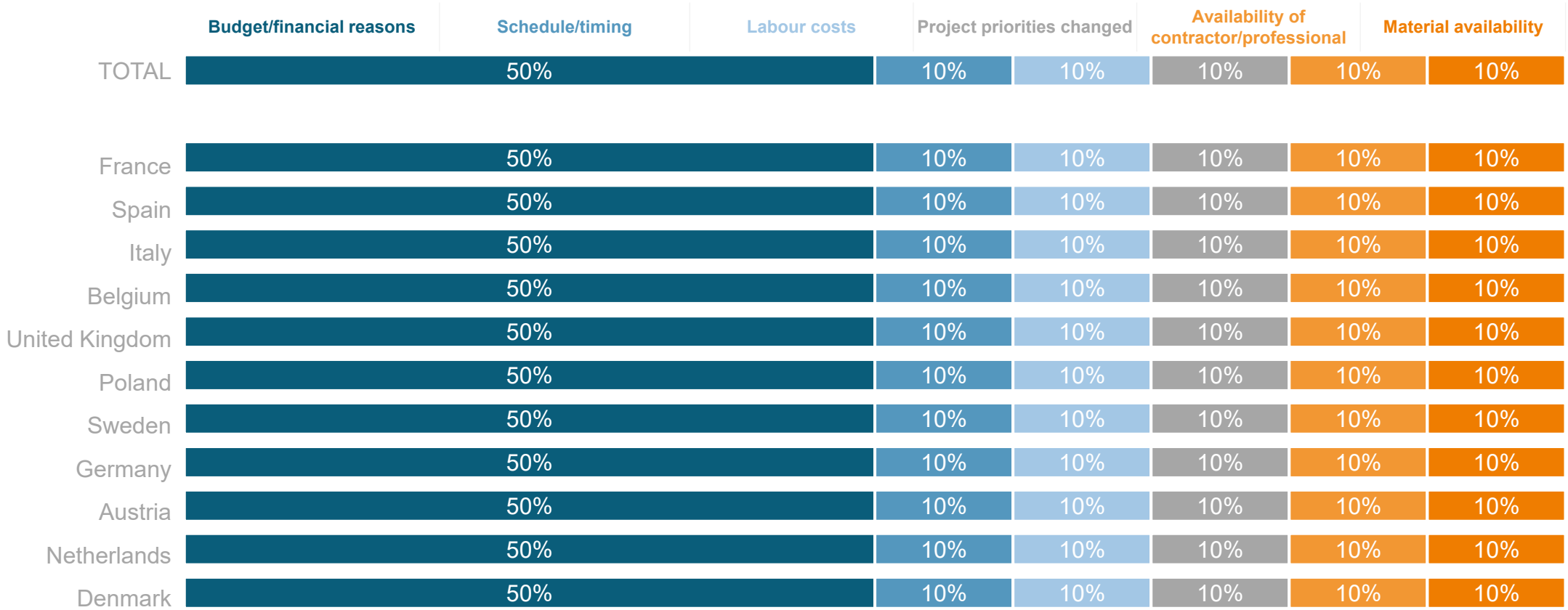
Postponed / cancelled home improvement project
In the last 30 days, have you postponed or cancelled a home improvement, repair or maintenance project you planned to start?



European Home Improvement Monitor Q3 2026
Base: N= all respondents

Lorem ipsum dolor sit amet, consectetuer adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa.

Cancellation reasons
Q: Why did you postpone or cancel your home improvement, repair or maintenance project?



USP Marketing Consultancy

© 24 November 2026, USP Marketing Consultancy B.V.

The information in this publication is strictly confidential and all relevant copyrights, database rights and other (intellectual) property rights are explicitly reserved. No part of this publication may be reproduced and/ or published without the prior written permission of USP Marketing Consultancy B.V.