glocalization

"Think Global Act Local"

Kingfisher

our markets and our stores

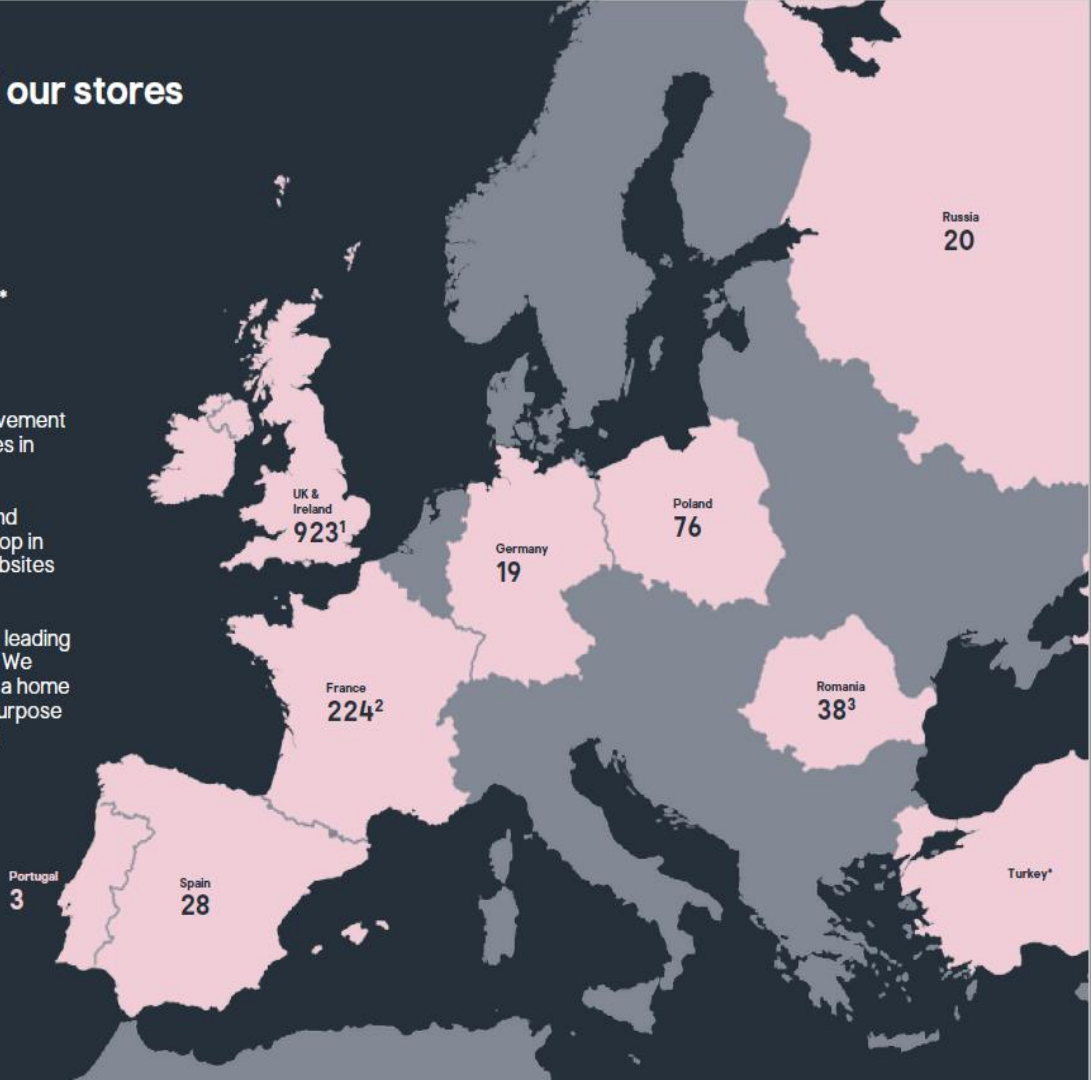
1,331* **stores**

77,300†* **colleagues**

Kingfisher plc is a home improvement company with over 1,300 stores in 10 countries across Europe.

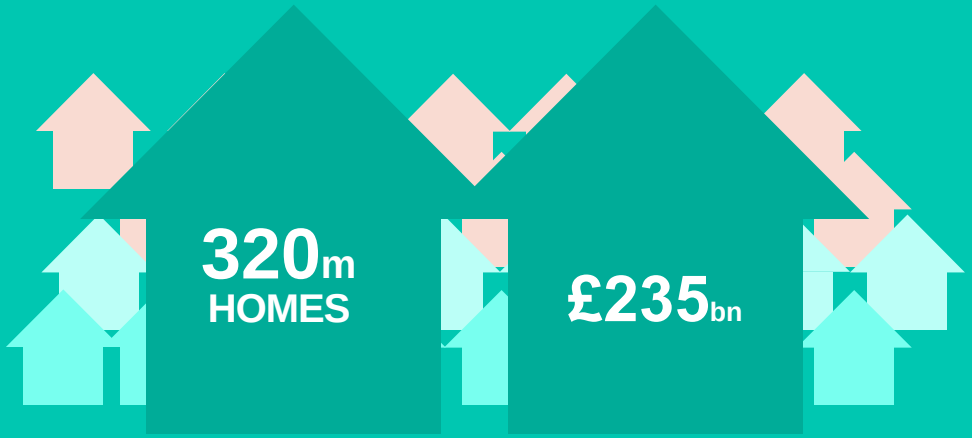
We employ 77,300†* people and nearly six million customers shop in our stores and through our websites and apps every week.

Our ambition is to become the leading home improvement company. We believe everyone should have a home they feel good about, so our purpose is to make home improvement accessible for everyone.



1. B&Q UK & Ireland 296, Screwfix 627.
2. Castorama 101, Brico Dépôt 123.
3. Brico Dépôt 15, Praktiker 23.
4. Turkey joint venture not consolidated.
5. Total, not full-time equivalent.

The European Home improvement market is huge



based on facts, customers needs are more similar than different

a good home

= happiness

“ Our home is holding who we are. Where we can truly be ourselves. It’s meant to be a place of restoration. We can completely let go and be our true selves.”

Lindsay Graham
Psychologist, Research Specialist, Head of The Psychology of Space
The Centre for the Built Environment, Berkeley, USA

"Home. I think of a place I enjoy being in, that makes me glad to be here. My home makes me happy. It is a feel-good place"

Benjamin, 26
Bretagne, France

Our homes account for

15%

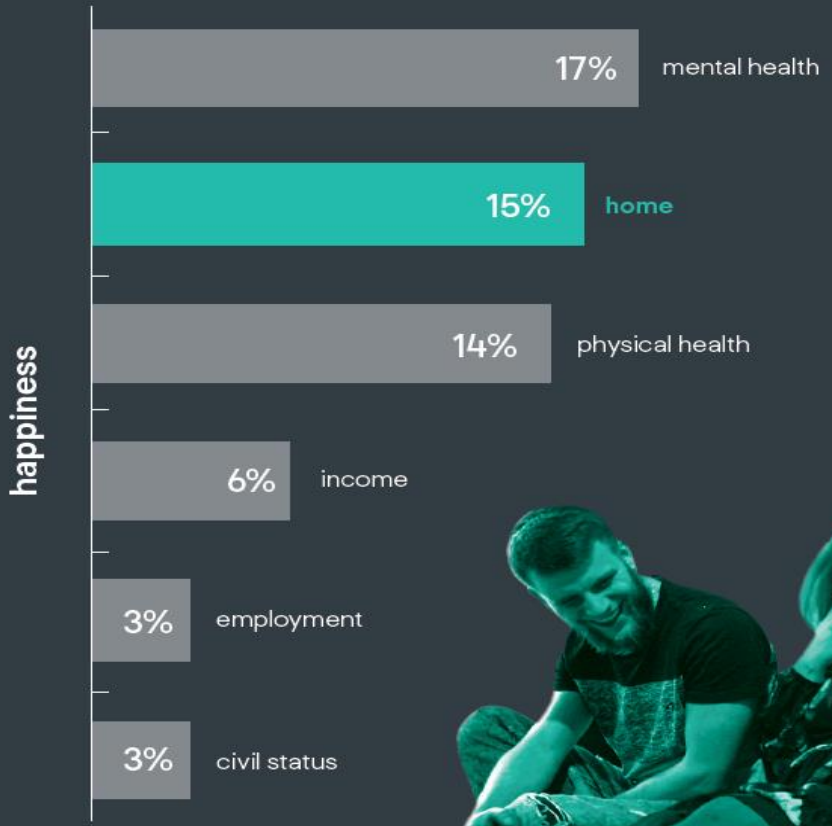
of our overall happiness. Much more than our income or employment status.

73%

of people who are happy at home are also happy in life.

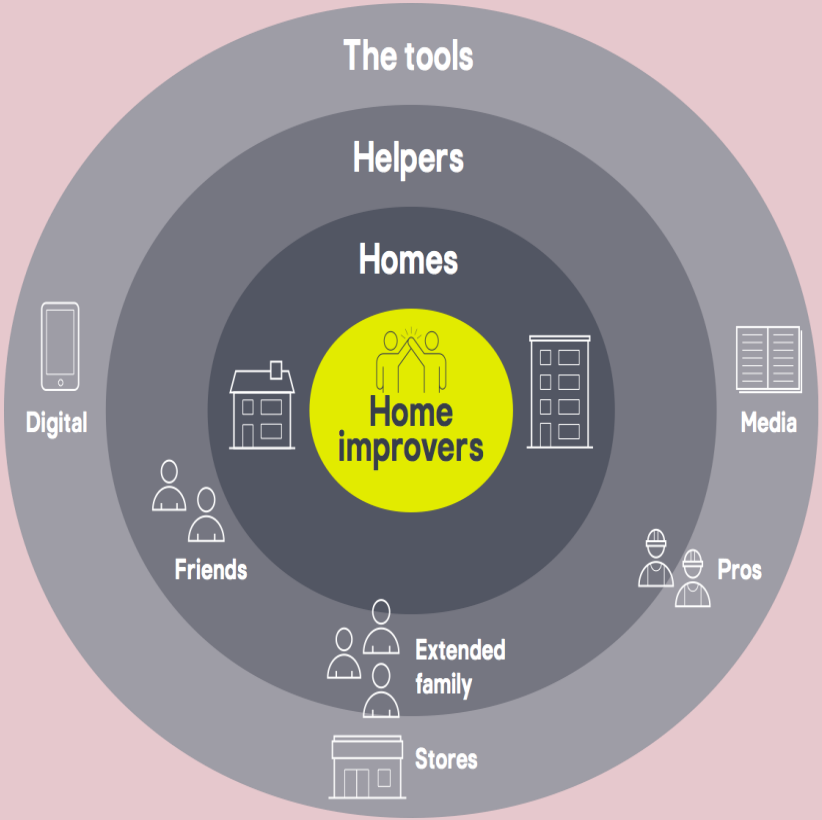
happy home: happy life

our homes are one of the biggest factors in our overall happiness



too often, home improvement is a "walk in the dark”

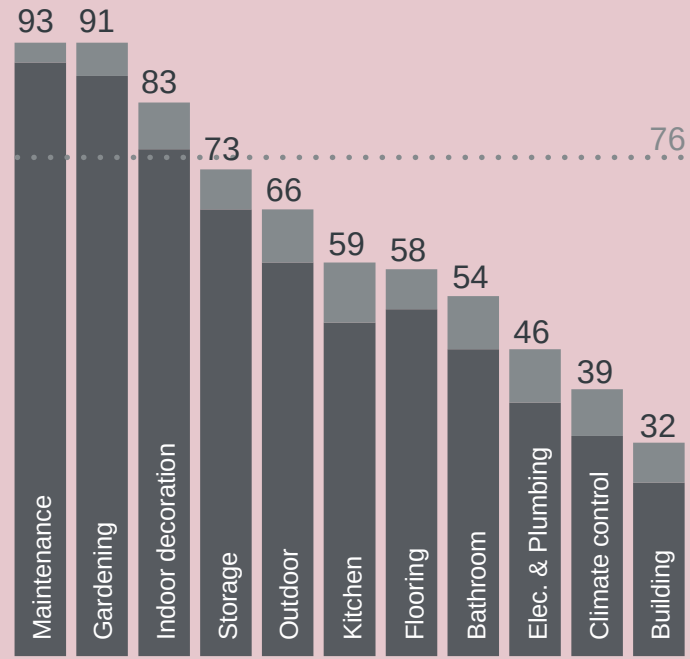
home improvement ecosystem



customers do a lot themselves & it isn’t changing

% of customers who completed their project themselves (UK, FR, POL)

- Partially
- Exclusively
- Average % involved in completion



4 steps of the customer project

It starts with inspiration and ends with execution

Simplicity

Project focus, not only product

Easy to understand and shop

Less # of skus

Functionality

Better quality and fit for purpose/ customer need

Harmony

Between floors/

Between walls & floors

Unity

Floor unity between rooms and respect the house

inspiration

future of retail

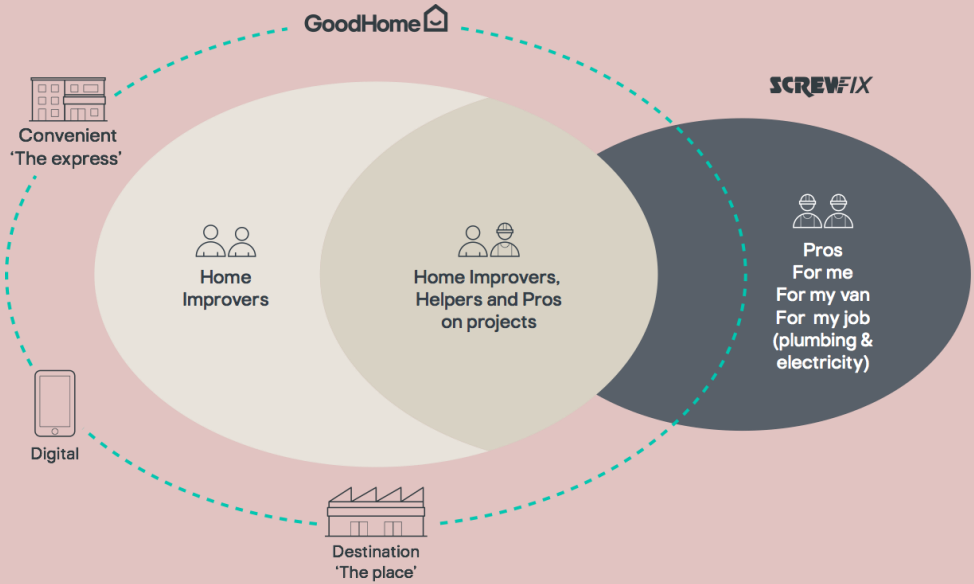
design led

IKEA
Decathlon
Zara
Goodhome

marketplaces

Amazon
AliBaba
ManoMano
Armut.com

Kingfisher future sales ecosystem



key trends impacting the procurement in retail environment

Protectionism is back

Product costs are Rising globally

Big data for informed Decision / negotiation

Sustainability is part of new reality

Omni channel Retail / Suppy chain is key

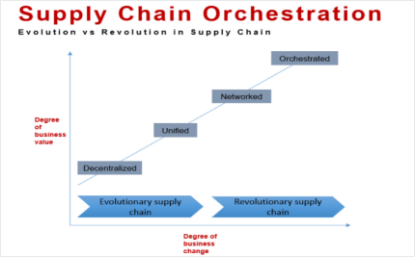
LCC sourcing is multiplying risks

developing

Co-creation

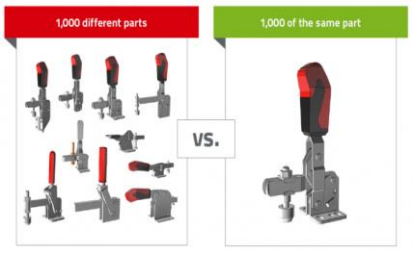
Dynamic Best Country

Value Chain Orchestration



Collaborative costing

Reduce portfolio complexity



Seramiğin Geleceği Projesi, canlı ve dirençli bir Türk seramik sektörü için destek sağlamayı amaçlayan yeni bir ortaklık…

SERAMİĞİN GELECEĞİ PROJESİ

Future of manufacturing