



Wet weather forces customers indoors

Total DIY sales for the second quarter of 2012 were down -13%^[1] compared with 2011 in value. Faced with one of the wettest second quarters on record, it is clear that the outdoor markets have been impacted with the decline contrasting unfavourably to the 3%^[2] growth in Total DIY sales for the same period in 2011.

Total garden care^[3] was particularly affected in April, where sales were down over -42%. There were, however, areas of some positivity within total garden care for Q2 of 2012, notably within pest & disease (e.g. slug killers reported a 15% value growth in sales). Overall sales performance weakened to such an extent that total garden care Q2, 2012 fell by -22% in value versus 2011, with volume falling at a similar rate.

Elsewhere within the garden sector, further categories were influenced by the wet weather conditions, notably **garden power**^[4]. It was clear there was an element of pent up demand after a wet April, with May sales rising by 48% in value for lawnmowers.



Within **garden hand tools**, there has been an overall decline of -17% in Q2 value. The only bright spot being hoes/weeders and lawn rakes, reporting a marginal increase of 2% sales value versus Q2, 2011.

Inside the home, **emulsion paint** sales for Q2 increased by 5% in value terms compared to the same period last year. This is largely driven by an increase in average prices over that time, as raw material prices continue to climb.

Sales of **power tools** have remained relatively flat, with a Q2 decline of approaching 2% in sales value versus Q2, 2011. Rotary hammer drills and multi-tools, however, bucked the trend performing positively, with double digit sales value gains compared to that of Q2, 2011.

After such a disappointing period, it is hopeful that the anticipated warmer weather, combined with the Olympic feel-good factor, can assist with improved sales in Q3 for all DIY markets.

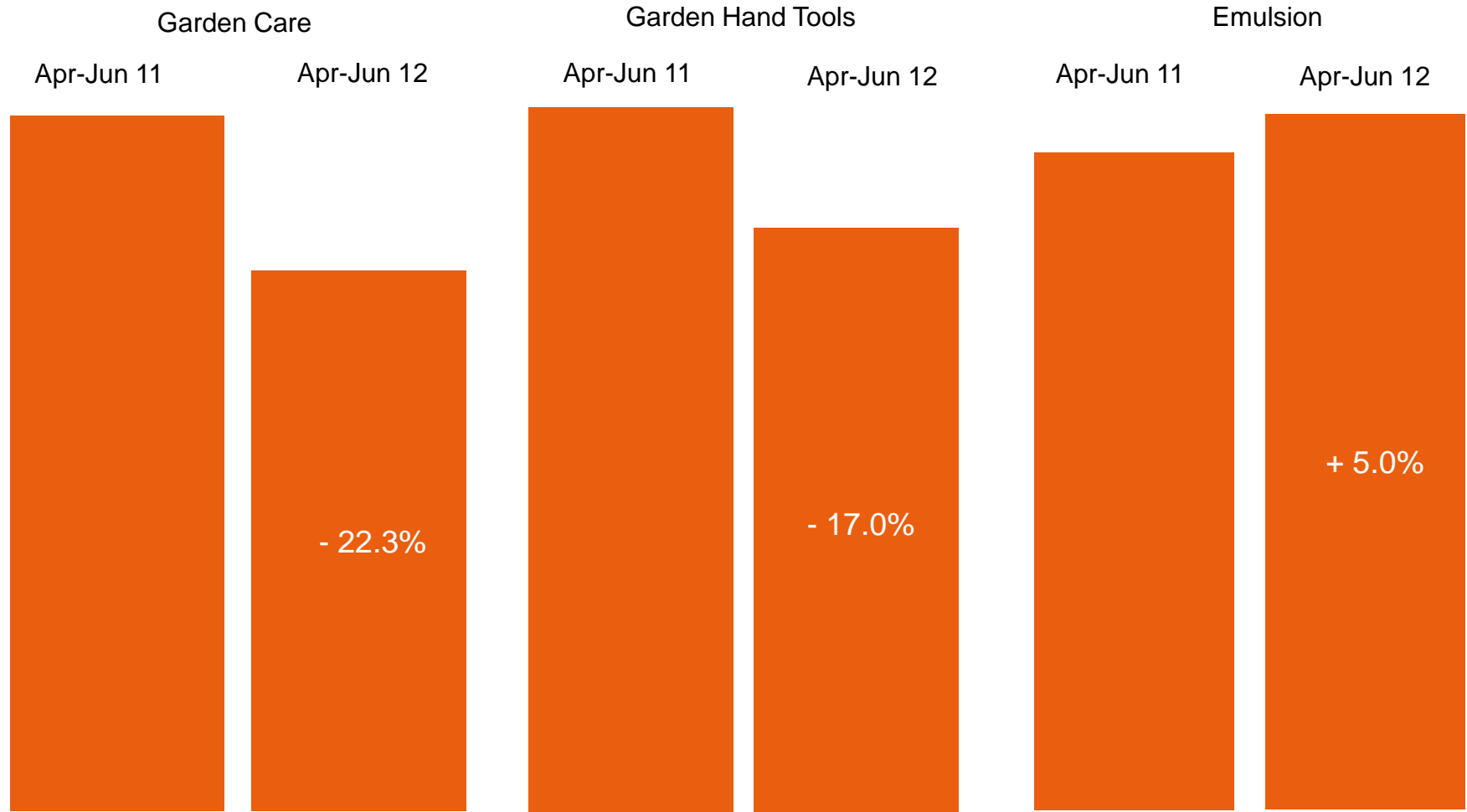
DIY Cross-Market Q2 Performance



Q2, 2011 vs. Q2, 2012

GfK Panelmarket

Th. Sales Value GBP



Sources:

- [1] GfK Market-I, DIY & Garden, June 2012
- [2] GfK Market-I, DIY & Garden, June 2011
- [3] Total Garden Care includes:
Total Fertilisers, Chemicals, Growing Media, Lawn Seed & Soil Conditioners
- [4] Total Garden Power includes:
Lawnmowers (Hand & Powered), Chainsaws, Grass Shearers, Scarifiers,
Hedge Trimmers, Shredders, Blow Vacuums, Grass Trimmers

(Garden Care: GfK Panel market excluding Ironmongers)

(Garden Power & Garden Hand Tools: GfK Panel market)

(Emulsion Paint & Power Tools: GfK Panel market excluding Garden Centres)

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