

DIY/Gardening blossoms in rare British sunshine

The third quarter of 2013 was a time to be outside, which was reflected in sales of DIY/Garden products, which grew by 3.9%* in value terms from Q3 2012. This compares favourably to consumer durables as a whole, which declined by 2.5% in the same time period. The sunshine and warmth that began in June continued through July and August, boosting sales of exterior coating materials, garden care and outdoor BBQs.

The garden care sector had a number of strongly growing products: garden watering was up by 96.1%, driven by the warm dry weather, garden structures were up 34.4% as consumers begin to make more substantive investments in home and garden, and fertilisers up by 24.4% after a slow start to the year. Though these growth rates are encouraging, the dismal weather and associated drop in sales in Q3 2012 should be remembered.

- All growth rates refer to value
- GfK Market-I
- Garden watering – GfK Panelmarket
- Fertilisers – GfK Panelmarket excl. Ironmongers
- Garden structures – GfK Panelmarket exc. Ironmongers/Garden Centres

Insight DIY Q3 2013



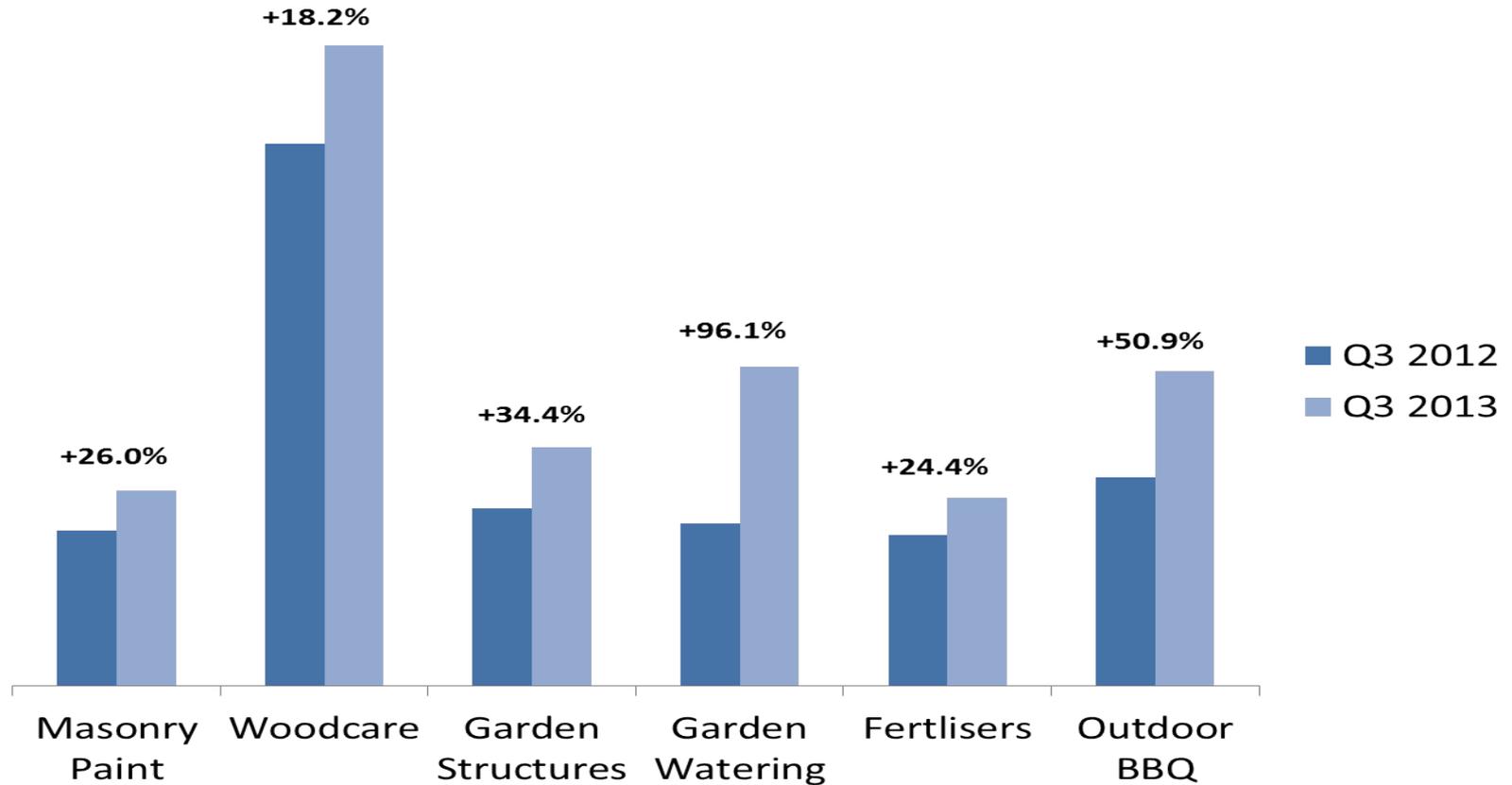
Performance was not as strong for garden tools, for although the weather encouraged outdoor pursuits, the lack of rain did not encourage growth in plants. Thus the sales value of lawnmowers in Q3 2013 was down by 20.3% compared to Q3 2012, and trimmers were down by 10.8%. General tools fared better, with power tools growing by 5.0%.

There was healthy growth in the decorative areas, driven by exterior categories. Woodcare was up by 18.2%, driven by decorative garden colours, water-based treatments and preservers, specialist paint up by 9.6%, with strong growth for finishes for metal, and masonry paint up by 26.0%. Again, this reflects not only good performance this year, but also the weak performance of 2012.

With the outsides of homes looking refreshed and gardens in bloom, people were ready to relax and enjoy; sales of outdoor BBQ's were up by 50.9%.

All growth rates refer to value
Garden tools, woodcare - GfK Panelmarket
Specialist paint, masonry, outdoor BBQs – GfK Panelmarket excluding ironmongers

Key category performers in Q3 2013 (sales value)



Garden Watering, Woodcare – GfK Panelmarket
 Masonry Paint - GfK Panelmarket excl. Garden centres
 Fertilisers, Outdoor BBQ – GfK Panelmarket excl. Ironmongers
 Garden Structures - GfK Panelmarket exc. Ironmongers/Garden Centres



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