

Cold Easter impacts outdoor categories

The first quarter of 2013 has unfortunately seen a decline of 11% in value for the total DIY/Gardening* sector compared to the first quarter of 2012. Key to this was the particularly favourable period a year ago when the outdoor categories were buoyed by slightly warmer, sunnier and drier weather. As has been well documented this year so far, temperatures have been much cooler than average, particularly in March and performance for many garden categories were understandably negative for this reason.

Value sales for key garden care sectors such as chemicals, fertilisers and growing media all declined at a rate of around 40% or more in the first quarter. Garden tools, such as lawnmowers and garden hand tools were also impacted to varying degrees.

One exception in the garden category was the positive growth for wild bird care products, a category where sales do seem to benefit from the cold weather.

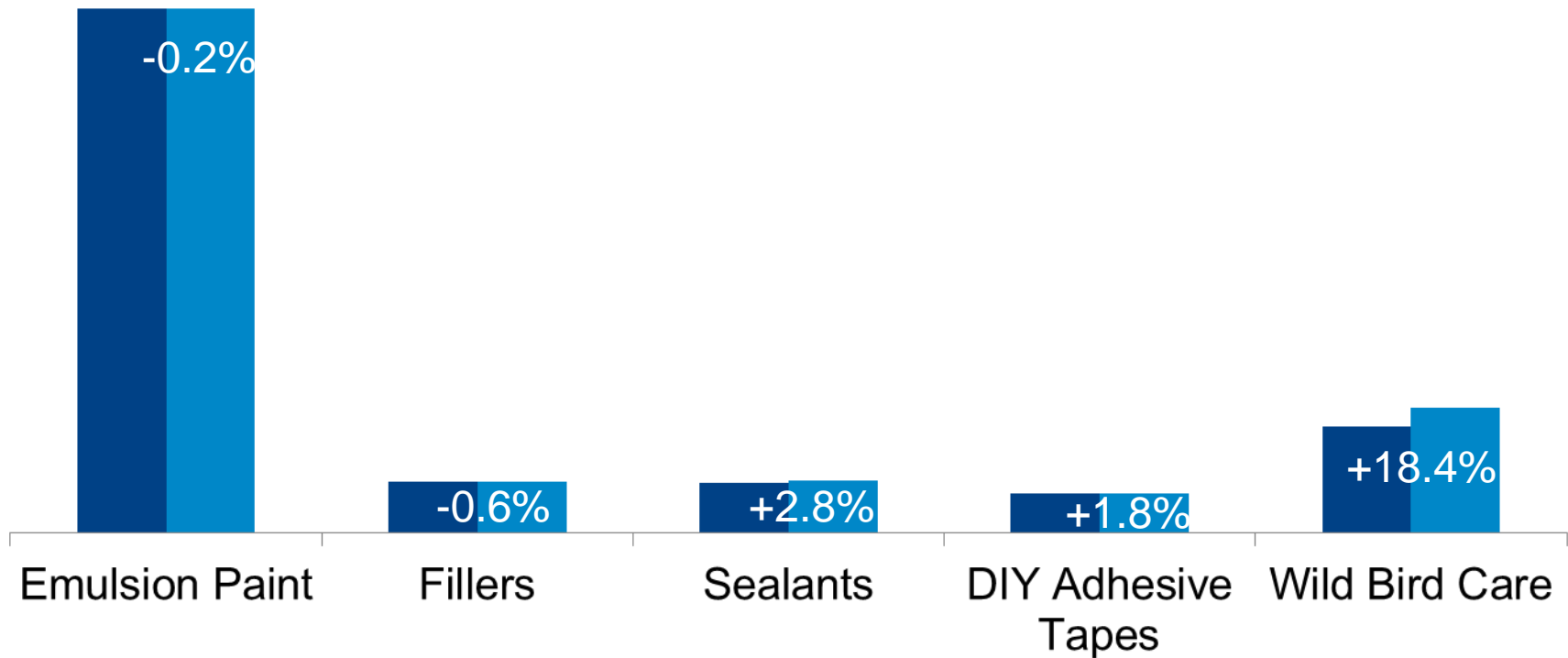
As a result of the declines for garden there has been more focus on the indoor categories with some reporting good results, partly due to the earlier fall of Easter in 2013 compared to 2012. Emulsion paint volumes for example grew by 11% in March 13 vs. March 12, which was the best monthly growth rate for well over a year. This also meant total volume across the first quarter was almost exactly the same as last year.

We have also seen average price per litre for emulsion paint stabilising after the increases seen over the last few years, resulting in value sales in quarter 1 also on a par with a year ago.

There were also volume increases in a number of pre-decorative sectors in quarter 1 with DIY adhesive tapes, fillers and sealants some examples of this.

Key category performers in Q1 2013 (sales value)

■ Q1 2012 ■ Q1 2013



Emulsion Paint, Fillers, Sealants - GfK Panelmarket excl. Garden centres
 DIY Adhesive Tapes – GfK Panelmarket excl. IM/GC
 Wild Bird Care – GfK Panelmarket excl. Ironmongers



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