



Improving weather leads fight back of DIY/gardening

Positive news for the DIY/gardening sector as the second quarter of the year has returned 11% value growth compared to the same period last year. This is particularly encouraging as a recovery has been made from the first quarter of 2013 which reported a value decline of 11%. The main driver of this has been the vastly improved weather conditions this quarter compared to last year and the release of pent up demand due to one of the coldest first quarters on record. June 13 in particular was an excellent month growing nearly 16% compared to June 12 as consumers spent time outdoors entertaining and gardening.

The garden care sector reported very positive value numbers with flower seeds** up 31.8% and garden watering up 58.1% versus the same quarter in 2012. Fertilisers grew by 29.1% thanks primarily to the strong performance of lawn fertiliser which recorded growth of 41%.

Much of garden power also benefitted from the weather boost with high pressure cleaners growing by 73.4% in value. Key category lawnmowers reported a value rise of 13.1%.

*GfK Market I

** Flower seeds excl. hybrids

Insight DIY Q2 2013

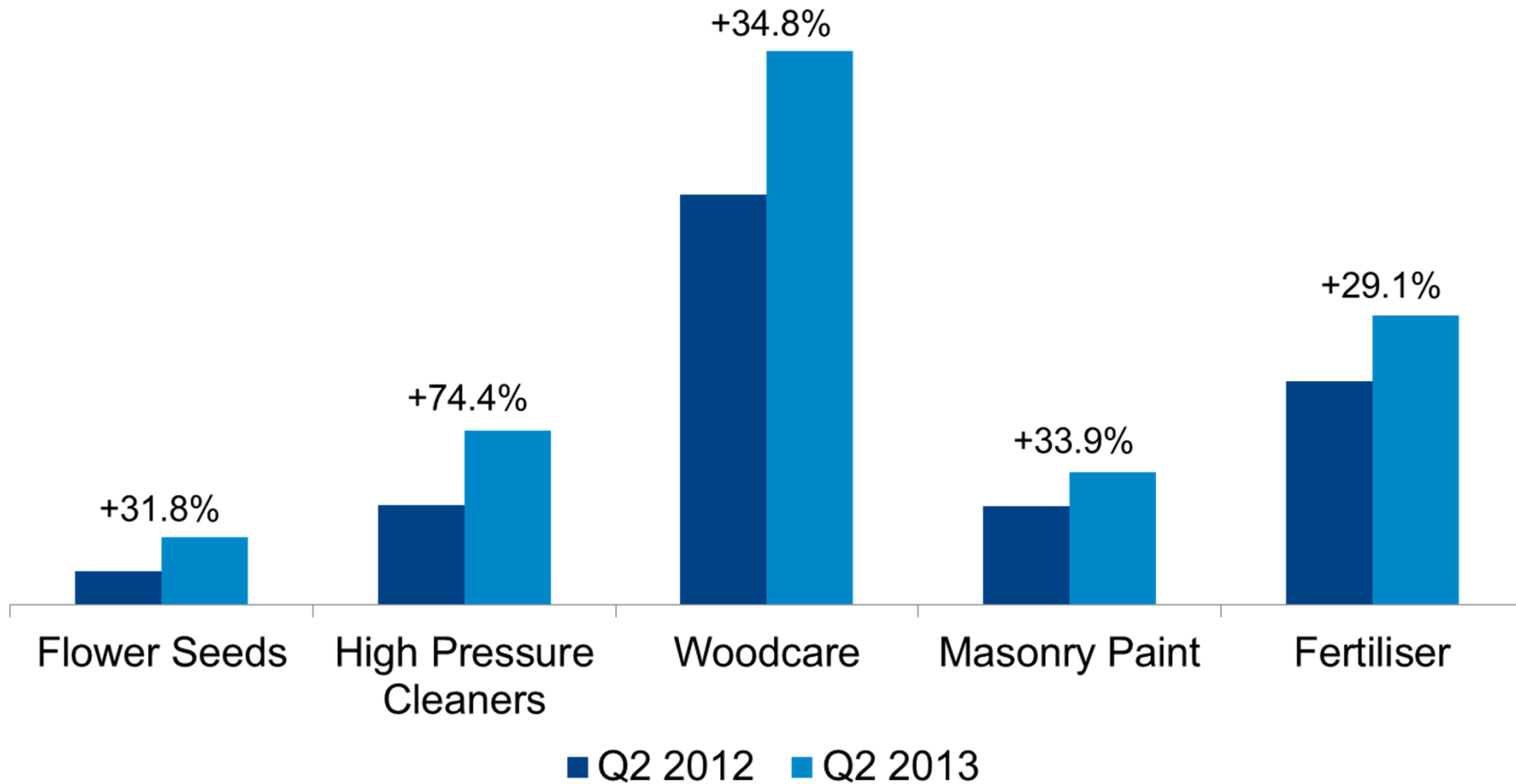


The decorative sector has also seen a pickup in outdoor products with woodcare reporting growth of 34.8% in value and 44.9% in volume. This is driven by the performance of decorative garden finishes, waterbased treatments and exterior varnish. Furthermore masonry paint has grown by 33.9% in value whilst emulsion paint shows a decline of just over 5% in value. Again, highlighting the stronger performance of outdoor categories.

Despite the strong performance of outdoor products there were some positives within some of the indoor categories. Adhesive tapes, fillers and painting aids all reported volume growth, whilst value growth was seen in primers and undercoats, interior trim, intruder alerts and lightbulbs.

Emulsion Paint, Masonry Paint, Fillers, Painting Aids, Primers and Undercoats, Interior Trim - GfK Panelmarket excl. Garden centres
Adhesive Tapes – GfK Panelmarket excl. IM/GC
Lightbulbs reported by channel: DIY, Grocery, Other MM

Key category performers in Q2 2013 (sales value)



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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