

Clothing, Footwear & Accessories

Analyst: Elaine Giles

Source: TNS Worldpanel Fashion

Data: 24 week ending 6th January 2008

Expenditure
£15.9 bn
+2.3%

No. of Units
1.6 bn
-1.2%

Average Selling Price
£9.83
+3.7%

Retail Sector Share £%

	24 w/e 07 Jan 2007	24 w/e 06 Jan 2008
Fashion Multiples	26.7	27.6
Clothing Independents	7.8	6.7
General Stores	14.3	14.5
Dept Stores	7.9	7.8
Footwear Shops	6.0	5.7
Home Shopping	5.5	6.0
Internet	1.1	1.4
Discounters	11.2	10.5
Supermarkets	7.0	7.2
Sports Shops	9.9	9.8
Other	2.6	2.8

24 w/e 6th January 2008

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Volumes see year on year decline for the first time in 9 years, causing sales growth to slow. Fashion Multiples and home shopping gain share whilst discounters lose share. Supermarket growth also slows.

Womenswear sales growth is slightly ahead of the market at +3% and this is the only sector not to see volumes decline. Clothing multiples see the strongest growth and make gains in both the full price and discounted markets.

The childrenswear sector is static on last year, the poorest performance of the sectors, as declines in discounted cancel out gains in the full price market. General stores gain share in this sector.

The menswear market sees 2% year on year growth as discounted sales rise by 3%. Discounters see their largest share declines in the menswear sector. Internet specialist retailers begin to market their mark on this sector and now take 2% market share.

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Product Trends

Childrenswear

Winners: Accessories, girls canvas shoes, dresses, boys fleeces, boys sweatshirts, boys knitwear.

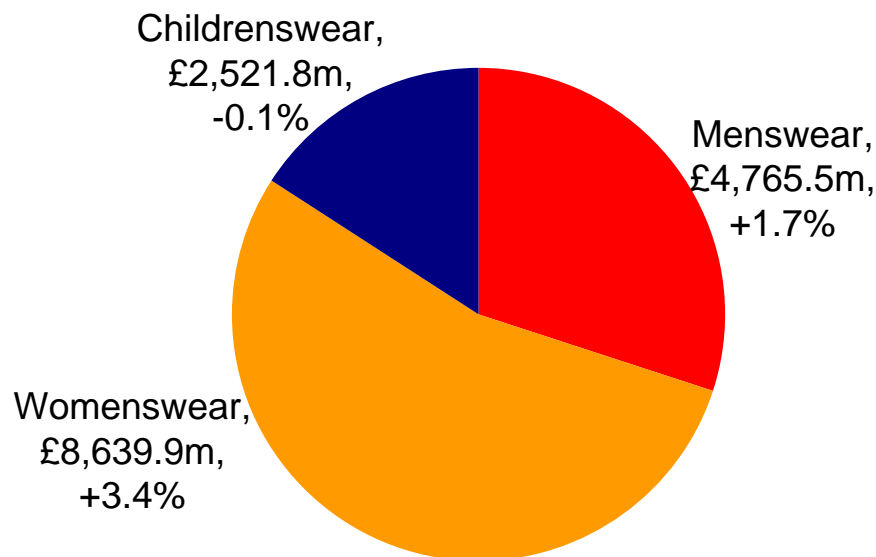
Losers: Dressing gowns, boots, girls joggers, boys jeans, boys shorts, boys pyjamas, boys T shirts.

Product Trends

Menswear

Winners: Cardigans, belts, shorts, polo shirts, dressing gowns, sweatshirts

Losers: replica kits, hats/caps, jackets/blazers, jeans, pyjamas.



Product Trends

Womenswear

Winners: Polo shirts, costume jewellery, shorts, handbags, dresses, slippers, belts,

Losers: suits, combat trousers, casual skirts, vest tops, formal skirts, jogging bottoms, tights