

Clothing, Footwear & Accessories

Analyst: Vanessa Belleau

Source: TNS Worldpanel Fashion

Data: 24 week ending 2nd March 2008

Expenditure
£15.6 bn
+1.2%

No. of Units
1.5 bn
-3.2%

Average Selling Price
£10.11
+4.5%

Retail Sector Share £%

	24 w/e 04 Mar 2007	24 w/e 02 Mar 2008
Fashion Multiples	27.1	27.7
Clothing Independents	7.5	6.6
General Stores	4.3	4.2
Dept Stores	1.3	1.2
Footwear Shops	14.5	14.7
Home Shopping	8.0	8.0
Internet	5.7	6.2
Discounters	1.2	1.6
Supermarkets	11.4	10.6
Sports Shops	9.4	9.5
Other	7.1	7.2

24 w/e 2nd March 2008

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Sales and volumes of Total Clothing, Footwear and Accessories both continue to slow this month. Average prices are still up and above £10. Fashion multiples increase their presence whilst supermarkets lose value share.

Womenswear remains the strongest growing sector. This performance is driven predominantly by prices as volumes get suppressed. Multiples gain share along with mail order retailers.

The childrenswear sector remains in the same position as last month. The market 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 and Fashion multiples gain share in this sector.

Menswear shows a similar performance to last month with just +1% on last year. Volumes decline in line with the total market as volumes of full price goods fall by 5%. Again multiples and mail order are the key winners.

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Data: 24 week ending 2nd March 2008 vs 2007

Product Trends

Childrenswear

Winners: Outfits, sandals, sweatshirts, boys bodysuits, boys slippers, girls wellies/snow boots

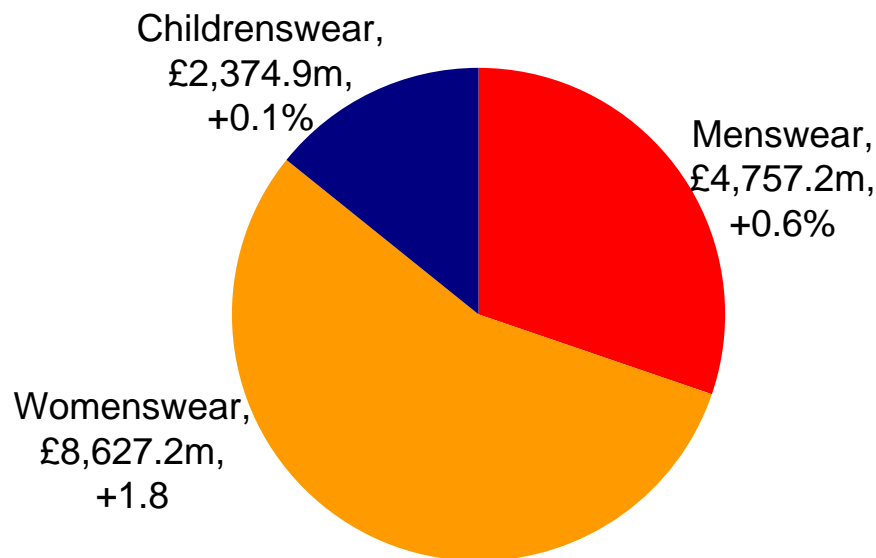
Losers: Boys T shirts, dressing gowns, vests, trousers, girls nightshirts/dresses

Product Trends

Menswear

Winners: sandals, cardigans, belts, nightshirts, polo shirt, ties, sweatshirts and swimwear

Losers: rugby shirt, jackets/blazers, replica kits, hats/caps, jeans, briefs, casual shirts, pyjamas



Product Trends

Womenswear

Winners: sports shorts, polo shirts, swimwear, party dress, costume jewellery, belts, handbags

Losers: combat trousers, casual shirts, tracksuits, suits, vests/sun tops, scarves/gloves, hats/caps