

Clothing, Footwear & Accessories

Analyst: Elaine Giles

Source: TNS Worldpanel Fashion

Data: 24 week ending 30th March 2008

Expenditure
£15.5 bn
+0.3%

No. of Units
1.5 bn
-4.2%

Average Selling Price
£9.99
+4.7%

Retail Sector Share £%

	24 w/e 01 Apr 2007	24 w/e 30 Mar 2008
Fashion Multiples	23.0	23.1
Clothing Independents	9.8	9.0
General Stores	12.5	13.1
Dept Stores	8.8	9.0
Footwear Shops	4.8	4.7
Home Shopping	5.0	5.9
Internet	2.3	2.1
Discounters	10.3	9.4
Supermarkets	5.2	5.4
Sports Shops	16.5	16.3
Other	1.9	2.1

24 w/e 30th March 2008

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Sales of the Total Clothing, Footwear and Accessories slow again this month and only just remain in growth. General Stores, performing well on discounted product, and Home Shopping are the key winners.

Womenswear is now the only sector where sales are in growth driven by a strong performance from discounted product. Home Shopping retailers benefit from increased sales online and gain back share lost over the last few years.

The childrenswear sector remains in the same position as last month. The market is static on last year, as declines in discounted cancel out gains in the full price market.

Menswear sales drop into decline this month, and the sector becomes the worst performing. Independents struggle across all sectors but their performance is worst in menswear. General Stores and Home Shopping manage to out perform the rest of the market.

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Product Trends

Childrenswear

Winners: Baby Shoes, Sweatshirts, Boys Polo Shirts, Accessories, Boys Slippers, Sandals

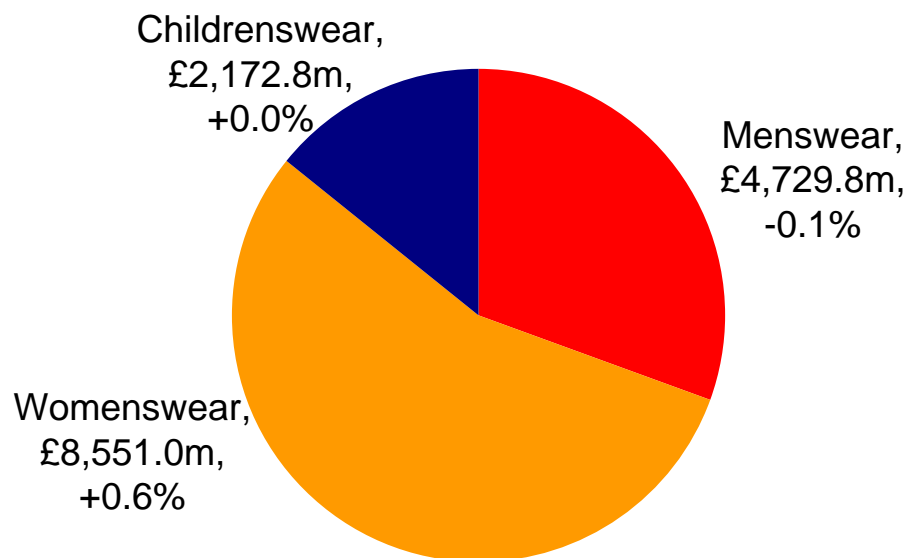
Losers: Dressing Gowns, Girls Joggers, Gloves, Vests, Boys T Shirts, Girls Slippers, Girls Boots

Product Trends

Menswear

Winners: Cardigans, Belts, Polo Shirts, Shorts, Sweatshirts, Boots, Casual Tops, Ties, Combat Trousers

Losers: Replica Kit, Jeans, Briefs, Hats/Caps, Formal Shoes, Jackets/Blazers, Casual Shirts



Product Trends

Womenswear

Winners: Costume Jewellery, Swimwear, Polo Shirts, Dresses, Handbags, Slippers, Shorts, Sweatshirts, Blouses

Losers: Tracksuits, Combat Trousers, Skirts, Suits, Scarves/Gloves, Vest Tops, Hats/Caps, Tights, T Shirts.