

# CBI Distributive Trades Survey

## Retailing

June 2008

| How do your SALES and ORDERS for this month and your expectations for the next month compare with a year earlier? |   | Up   | Same     | Down | N/A |
|---|---|------|----------|------|-----|
| 1   | Volume of sales - reported                                | 30   | 30       | 39   | 0   |
|   | - expected  | 32   | 30       | 39   | 0   |
| 2   | Volume of orders placed upon suppliers - reported         | 26   | 34       | 38   | 2   |
|   | - expected  | 27   | 32       | 39   | 2   |
| What is your position with regards to your:   |   | Good | Average  | Poor | N/A |
| 3   | Volume of sales for the time of year - reported           | 21   | 38       | 42   | 0   |
|   | - expected  | 20   | 43       | 37   | 0   |
| What is your position with regards to your:   |   | High | Adequate | Low  | N/A |
| 4   | Volume of stocks in relation to expected sales - reported | 23   | 76       | 1    | 1   |
|   | - expected  | 13   | 86       | 0    | 1   |

## Recent results

|   |   | 2008     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|---|---|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|   |   | Jun      | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul |
| 1 | Volume of sales                                 | Reported | +17 | +18 | +15 | +12 | +10 | +13 | +8  | +4  | -3  | +1  | -26 | -14 | -9  |
|   |   | Expected | +23 | +19 | +14 | +17 | +16 | +15 | +11 | -5  | +10 | -2  | -3  | -15 | +6  |
|   | Volume of sales - 3 month moving average        | Reported | +31 | +22 | +17 | +15 | +12 | +12 | +10 | +8  | +3  | +1  | -9  | -13 | -16 |
|   |   | Expected | +27 | +26 | +19 | +17 | +16 | +16 | +14 | +7  | +5  | +1  | +2  | -7  | -4  |
| 2 | Volume of orders placed upon suppliers          | Reported | +16 | +15 | +15 | +11 | +16 | +18 | +6  | +4  | -4  | -10 | -28 | -23 | -12 |
|   |   | Expected | +16 | +14 | +6  | +18 | +16 | +12 | +10 | -9  | +10 | -3  | -6  | -14 | -2  |
| 3 | Volume of sales for the time of year            | Reported | +10 | -17 | -7  | -1  | 0   | -3  | -5  | 0   | -7  | -14 | -38 | -25 | -21 |
|   |   | Expected | +10 | +11 | -5  | +2  | -9  | +2  | +3  | -16 | -5  | -10 | -15 | -26 | -14 |
| 4 | Volume of stocks in relation to expected demand | Reported | +6  | +14 | +14 | +12 | +13 | +18 | +24 | +9  | +11 | +10 | +17 | +22 | +22 |
|   |   | Expected | +15 | +6  | +6  | +10 | +5  | +12 | +11 | +24 | +11 | +10 | +11 | +18 | +16 |

## By sector: Q1 volume of sales (reported)

|                               |  | 2008 |     |     |     |     |     |     |     |     |     |     |     |     |  |
|-------------------------------|--|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--|
|                               |  | Jun  | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |  |
| Grocers                       |  | +25  | +30 | +18 | +19 | +19 | +30 | +32 | +35 | +30 | +29 | +3  | +51 | +67 |  |
| Specialist food               |  | +30  | +32 | +2  | -22 | +10 | +35 | +56 | +4  | -9  | ~   | -76 | -65 | -48 |  |
| Confectionery, tobacco & news |  | 0    | ~   | ~   | ~   | ~   | ~   | ~   | ~   | ~   | ~   | ~   | ~   |     |  |
| Clothing                      |  | -52  | -3  | -37 | -16 | -39 | -40 | -11 | -29 | -10 | +4  | -25 | +3  | -57 |  |
| Footwear & leather            |  | +58  | +61 | +70 | +49 | +54 | +54 | -87 | +56 | +35 | +58 | +37 | +51 | +41 |  |
| Durable household goods       |  | -21  | -14 | -15 | -13 | +32 | -14 | -7  | -66 | -70 | -77 | -84 | -28 | -81 |  |
| Furniture & carpets           |  | -2   | +43 | +46 | +56 | +46 | -5  | -11 | +19 | -24 | 0   | -15 | -84 | -47 |  |
| Hardware, china & DIY         |  | +36  | -29 | +16 | +42 | -34 | -36 | -4  | -10 | -13 | -4  | -59 | -79 | -29 |  |
| Booksellers & stationers      |  | +2   | -15 | +41 | -77 | -53 | +24 | -43 | -19 | -19 | +17 | ~   | -23 | -86 |  |
| Chemists                      |  | +12  | -21 | +1  | +36 | +1  | -7  | +12 | -34 | +9  | -21 | +5  | +6  | -6  |  |
| Other retail                  |  | +43  | +15 | +39 | +27 | -2  | +32 | +27 | +24 | +20 | +4  | +6  | -23 | -8  |  |

### SURVEY DETAILS

The June 2008 CBI Distributive Trades Survey was conducted between 29th May and 11th June. 83 retailers replied. ~ denotes not released due to a low response

# CBI Distributive Trades Survey

## Wholesaling

June 2008

| How do your SALES and ORDERS for this month and your expectations for the next month compare with a year earlier? |   | Up   | Same     | Down | N/A |
|---|---|------|----------|------|-----|
| 1   | Volume of sales - reported                                | 21   | 57       | 23   | 0   |
|   | - expected  | 21   | 74       | 5    | 0   |
| 2   | Volume of orders placed upon suppliers - reported         | 28   | 49       | 23   | 0   |
|   | - expected  | 21   | 74       | 5    | 0   |
| What is your position with regards to your:   |   | Good | Average  | Poor | N/A |
| 3   | Volume of sales for the time of year - reported           | 3    | 92       | 5    | 0   |
|   | - expected  | 9    | 87       | 4    | 0   |
| What is your position with regards to your:   |   | High | Adequate | Low  | N/A |
| 4   | Volume of stocks in relation to expected sales - reported | 42   | 56       | 1    | 1   |
|   | - expected  | 25   | 74       | 0    | 1   |

## Recent results

|   |   | 2008     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|---|---|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|   |   | Jun      | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul |
| 1 | Volume of sales                                 | Reported | +23 | 0   | +51 | +67 | +12 | +51 | -42 | -32 | -35 | -4  | +47 | +50 | -2  |
|   |   | Expected | +32 | +16 | -6  | +52 | +42 | +35 | +24 | -48 | -32 | -35 | -20 | +5  | +1  |
|   | Volume of sales - 3 month moving average        | Reported | +26 | +15 | +25 | +39 | +43 | +43 | +7  | -8  | -36 | -24 | +3  | +31 | +32 |
|   |   | Expected | +30 | +25 | +14 | +21 | +29 | +43 | +34 | +4  | -19 | -38 | -29 | -17 | -5  |
| 2 | Volume of orders placed upon suppliers          | Reported | +21 | -3  | +29 | +64 | -14 | +38 | -40 | -35 | -35 | -3  | +39 | +41 | +5  |
|   |   | Expected | +37 | +14 | -8  | +33 | +42 | +10 | +13 | -46 | -35 | -35 | -24 | +2  | 0   |
| 3 | Volume of sales for the time of year            | Reported | +21 | +35 | +52 | +56 | +15 | +35 | +55 | -1  | -39 | -11 | -3  | +49 | -3  |
|   |   | Expected | +33 | +14 | +20 | +52 | +31 | +19 | +12 | +54 | +5  | -41 | -29 | -7  | 0   |
| 4 | Volume of stocks in relation to expected demand | Reported | +7  | +10 | +24 | +10 | -2  | -19 | +12 | +55 | +49 | +17 | +13 | +7  | +41 |
|   |   | Expected | +11 | +10 | +10 | +20 | +9  | +10 | +5  | +10 | +53 | +51 | +18 | +14 | +7  |

## By sector: Q1 volume of sales (reported)

|                               | 2008 |      |     |      |     |     |     |     |     |     |      |     |     |  |
|-------------------------------|------|------|-----|------|-----|-----|-----|-----|-----|-----|------|-----|-----|--|
|                               | Jun  | Jul  | Aug | Sep  | Oct | Nov | Dec | Jan | Feb | Mar | Apr  | May | Jun |  |
| Industrial materials          | -11  | +36  | +39 | +47  | +62 | +36 | +29 | +3  | +1  | -1  | +4   | +24 | +43 |  |
| Builders' merchants           | +52  | +3   | +11 | +22  | +25 | +46 | +49 | -5  | +24 | -12 | -13  | -27 | +12 |  |
| Elec. installation material   | ~    | ~    | ~   | ~    | ~   | ~   | ~   | ~   | ~   | ~   | ~    | ~   | ~   |  |
| Agricultural machinery        | -14  | +32  | +37 | -42  | -29 | 0   | 0   | -16 | +34 | +53 | 0    | +80 | -20 |  |
| Machinery & office equipment  | ~    | ~    | ~   | ~    | ~   | ~   | ~   | ~   | ~   | ~   | ~    | ~   | ~   |  |
| Clothing, textiles & footwear | -75  | +12  | +36 | +14  | -14 | +33 | -15 | -37 | +14 | -10 | -37  | 0   | 0   |  |
| Food and drink                | +26  | -77  | +7  | +21  | 0   | +70 | 0   | -14 | -51 | -26 | -21  | -20 | +73 |  |
| Durable household goods       | +17  | +100 | +74 | +100 | +29 | +83 | +29 | +59 | +22 | +14 | +37  | 0   | -23 |  |
| Other goods                   | +41  | 0    | +71 | ~    | 0   | ~   | ~   | -65 | -61 | 0   | +100 | +88 | -38 |  |

### SURVEY DETAILS

The June 2008 CBI Distributive Trades Survey was conducted between 29th May and 11th June. 48 wholesalers replied. ~ denotes not released due to a low response

# CBI Distributive Trades Survey

## Motor traders

### June 2008

| How do your SALES and ORDERS for this month and your expectations for the next month compare with a year earlier? |  | Up         | Same     | Down | N/A |   |
|---|--|------------|----------|------|-----|---|
| 1   | Volume of sales                                | - reported | 30       | 15   | 56  | 0 |
|   |  | - expected | 3        | 65   | 33  | 0 |
| 2   | Volume of orders placed upon suppliers         | - reported | 4        | 71   | 22  | 3 |
|   |  | - expected | 3        | 72   | 22  | 3 |
| What is your position with regards to your:   |  | Good       | Average  | Poor | N/A |   |
| 3   | Volume of sales for the time of year           | - reported | 27       | 50   | 23  | 0 |
|   |  | - expected | 2        | 52   | 47  | 0 |
| What is your position with regards to your:   |  | High       | Adequate | Low  | N/A |   |
| 4   | Volume of stocks in relation to expected sales | - reported | 9        | 85   | 5   | 0 |
|   |  | - expected | 12       | 83   | 5   | 0 |

### Recent results

|   |   | 2008     |     |     |     |     |     |     |     |     |     |     |     |     |     |
|---|---|----------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|   |   | Jun      | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul |
| 1 | Volume of sales                                 | Reported | -13 | -21 | -27 | 0   | +33 | +3  | -58 | -43 | +14 | +15 | +29 | +30 | -26 |
|   |   | Expected | -21 | +31 | -14 | -6  | -3  | +1  | -35 | -34 | -44 | -2  | +10 | +9  | -20 |
|   | Volume of sales - 3 month moving average        | Reported | +5  | -6  | -20 | -16 | +2  | +12 | -7  | -33 | -29 | -5  | +19 | +25 | +11 |
|   |   | Expected | -18 | +2  | -1  | +4  | -8  | -3  | -12 | -23 | -38 | -27 | -12 | +6  | -0  |
| 2 | Volume of orders placed upon suppliers          | Reported | -22 | -26 | -27 | 0   | +19 | -9  | -49 | -27 | +3  | +12 | +2  | +8  | -18 |
|   |   | Expected | -23 | +29 | -18 | -12 | -20 | -10 | -40 | -39 | -27 | -5  | +4  | -4  | -18 |
| 3 | Volume of sales for the time of year            | Reported | +6  | -14 | -13 | +23 | -3  | -32 | -30 | -46 | -3  | +18 | +25 | +30 | +4  |
|   |   | Expected | -27 | +11 | -11 | +1  | -11 | -19 | -28 | -5  | -48 | +16 | +7  | +7  | +6  |
| 4 | Volume of stocks in relation to expected demand | Reported | +10 | +15 | +13 | +8  | +16 | +13 | +15 | +20 | +30 | +28 | +37 | +21 | +4  |
|   |   | Expected | +10 | +5  | +3  | +9  | +5  | +10 | +17 | +11 | +25 | +19 | +7  | +34 | +21 |

### By sector: Q1 volume of sales (reported)

|                     |  | 2008 |     |     |     |     |     |     |     |     |     |     |     |     |
|---------------------|--|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
|                     |  | Jun  | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
| Vehicles            |  | -31  | -32 | -33 | -6  | +39 | +7  | -52 | -52 | +11 | +18 | +35 | +31 | -24 |
| Parts & accessories |  | +62  | +26 | 0   | +26 | +8  | -18 | -81 | 0   | +26 | 0   | 0   | +26 | -35 |

#### SURVEY DETAILS

The June 2008 CBI Distributive Trades Survey was conducted between 29th May and 11th June. 18 motor traders replied.