

## UK Retail Briefing - UK - April 2021

Report Price: £295.00 | \$398.34 | €331.99

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"In March, all retail sales grew 9.3%. March marks the one-year anniversary of the first lockdown in the UK and is the first time the retail sector has faced COVID-19 impacted comparative figures. In March 2020 retail sales saw a 2.8% decline as shoppers stockpiled ahead of an impending lockdown. With stores still closed in March 2021, online was again the big winner."

This report looks at the following areas:

- Analyst comment - H&M features vegan cactus leather in latest sustainability push
- An overview of the latest UK retail sales – Impact of COVID-19
- Highlights of the latest UK retail trend observations
- Sector focus – Household goods retailing
- Monthly UK retail news headlines and analysis

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This report is part of a series of reports, produced to provide you with a more holistic view of this market

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### Analyst Comment – H&M features vegan cactus leather in latest sustainability push

Figure 1: H&M's Science Story collection "unites the energy of the present moment and the optimism promised by a sustainable future, 2021  
 Figure 2: The Neon Green Sandals, in vegan imitation leather made from cactus leaves, £79.99, have sold out, 2021

Responding to the shift in shopping behaviours

Shoppers sceptical about sustainability claims

What we think

### UK Retail Sales

Key points

Retail sales

Figure 3: Retail sales trends, January 2019-March 2021

BRC vs ONS

Figure 4: UK retail sales y/y growth, BRC vs ONS, January 2018-March 2021

Inflation

Figure 5: Annual % change in the consumer price index for selected product groups, January 2019-March 2021

Inflation and wages

Figure 6: Real wages growth: wages growth vs inflation, January 2016-March 2021

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### Sector Focus – Household Goods

The sector – What's included

The sector in context

Figure 7: Household final consumption expenditure on household goods, 2016-20

Figure 8: Household goods specialists' sectors year on year growth in sales, 2016-20

Reduced appetite for big-ticket items and store closures impact furniture sales

Housing market resurgence help carpet specialists avoid another seismic collapse in sales

Renewed focus on the home and garden and booming ecommerce drive DIY sales

Specialists' lose out to non-specialists as online electrical purchasing rockets

Textile specialists' sales fall sharply on back of COVID-19 store closures

Rise in sector spending encouraging

Figure 9: Planned spend on home and garden products, 8 January-12 April 2021

### Launch Activity and Innovations

UK: Asda announces raft of new brand partnerships for George

UK: N Brown launches new brands to third-party offer starting with Finery

UK: Decathlon opens experiential flagship in Leeds

### Headlines for the Month

Convenience stores

Grocers

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Other food and drink specialists

Clothing retailing

Footwear retailing

Multi-sector retailing

Department stores

DIY retailing

Furniture retailing

### News Analysis – Food and Drink

Convenience stores

UK: McColl's full-years sales rise 3.2% despite drop in profits

UK: Nisa cuts wholesale prices for retailers in £2 million investment

Grocers

UK: Aldi

...removes plastic straws from all own-label drink cartons

...to offer National Lottery at all its stores

UK: Asda opens first London in-store vaccination centre

UK: Iceland launches new convenience format Swift

UK: Morrisons

...revenue up 8.9% despite drop in profits

...rolls out 'quiet hour' during weekend

UK: Tesco

...launches new plastic ban affecting online shoppers

...Pret teams up with Tesco to sell baked goods in supermarkets

...launches new plastic recycling scheme

UK: Waitrose to stop selling magazines with disposable plastic toys

Other food and drink specialists

UK: Greggs suffers £14m loss due to store closures

UK: Thorntons to close all shops risking 600 jobs

### News Analysis – Clothing and Footwear

UK: Barbour sees turnover rise 7.8% despite 'significant' COVID-19 impact

UK: Boda Skins rolls out buy-back scheme

UK: Boux Avenue unveils first athleisure collection

UK: Browns unveils new four-storey 'destination' store

UK: Burberry updates full-year outlook after rebound in sales

UK: Fred Perry opens new Manchester flagship

UK: Frugi Group sales up 51%

UK: Joules to open stores in Center Parcs holiday villages

UK: menswear rental service Garmentry launches in the UK

UK: Next

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...pre-tax profits drop 53% amid 'a crisis unprecedented in living memory'

...buys 25% stake in upmarket fashion retailer Reiss

UK: Peacocks rescued out of administration saving 2,000 jobs

UK: Ralph & Russo fall into administration

UK: retailers call on the government to reopen fitting rooms

UK: Ted Baker launches live shopping service for UK customers

UK: The Carlyle Group buys majority stake in End

UK: Weird Fish ecommerce grew 84% as it focuses on investing in digital and in-store experiences

Footwear retailing

UK: Clarks takeover completed

UK: Kurt Geiger to open nine new stores

### News Analysis – Mixed Goods

Multi-sector retailing

UK: B&M hires new digital director signalling a possible ecommerce push

UK: Halfords acquires Universal Tyre and Autocentres for £15m

UK: M&S

...outlines reopening plans with new campaign

...set to add Sosandar offering to website

...turns closed cafes into Easter pop-up stores

UK: Poundland

...set to open 30 new stores

...renegotiates 180 leases

UK: Wilko to roll out in-store recycling face-mask scheme

Department stores

UK: Debenhams

...Leicester store to be converted into flats

...to reopen for closing down sale

UK: John Lewis

...'does not expect to reopen all John Lewis shops at the end of lockdown'

...closes eight more stores

UK: Selfridges reveals first kitchen pop-up

### News Analysis – Household Goods

DIY retailing

UK: Homebase reveals revamped website

UK: Kingfisher

...sales grow 7% as it sees 'new generation of DIY'ers' emerge

...to launch B&Q stores in Saudi Arabia

UK: Screwfix plans 50 new store openings creating 600 jobs

UK: Topps Tiles sales fall 17.3% thanks to lockdown restrictions

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UK: Wickes and Travis Perkins demerger resumes

Furniture retailing

UK: Eve Sleep reduces annual losses by 83%

UK: owner of Julian Charles pledges to invest £20m for new retail acquisition

UK: ScS revenues up 14.4% as CEO steps down

UK: Victoria Plum sales grow by a record 46%

Homewares retailing

UK: home furnishing retailer Terrys sees 109% increase in demand during lockdowns

### News Analysis – Online

UK: Amazon reduces shares in Deliveroo

UK: Asos

...aims to raise £500 million to help global expansions push

...interim revenues up 24% as customers become confident in online shopping

UK: Boohoo turns to vintage fabric amid sustainability drive

UK: Just Eats revenues grows 54% to €2.4 billion

UK: Ocado

...quarterly revenues grow 40% 'reflecting strong demand for online grocery'

...relaunches own-label range as plastic-free

### News Analysis – Other Retail

Health & beauty retailing

UK: Boots online sales surge 105%

UK: Lloyds Pharmacy rolls out UK's first COVID-19 nasal spray

UK: Superdrug to stock Misguided Beauty

Sports and leisure goods retailing

UK: Evans Cycle to cut 300 jobs

UK: Frasers Group acquires retail park in Wigan

UK: Nike severs ties with Urban Outfitters as part of its DTC strategy

Garden centres

UK: Dobbies

...rolls out virtual spring events

...reveals new Little Dobbies format in Bristol

Shopping centres

UK: Bluewater to launch drive-in cinema to attract footfall

### News Analysis – Economy

UK: Boris Johnson confirms non-essential retail will reopen in England from April 12

UK: retailers campaign for 'Shop Out To help Out'

UK: shops opening hours will be extended until 10pm in April

UK: ONS results reveal February retail sales growth of 2.1%

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