

GfK Market-i

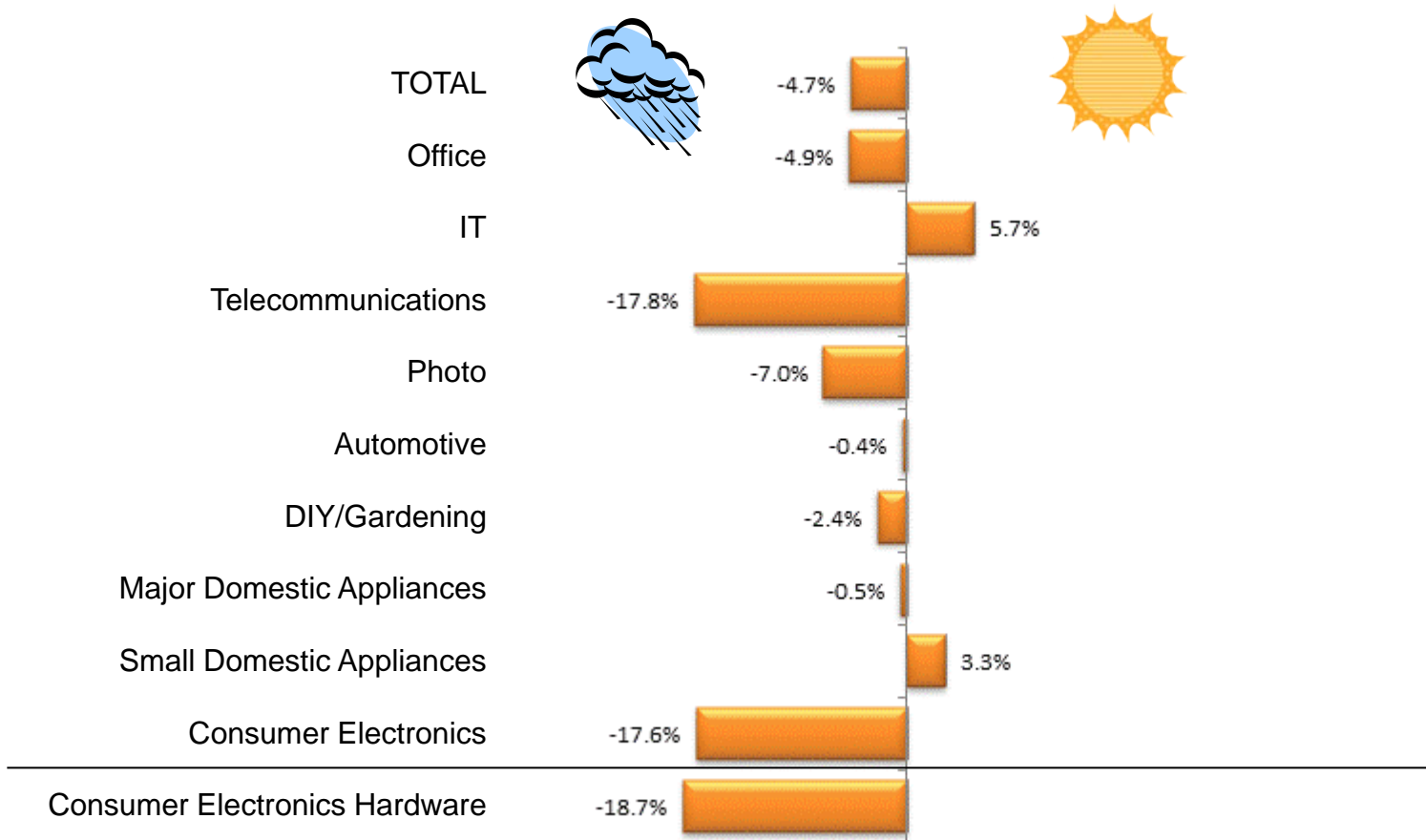
An Insight into April 2012 UK Durable Sectors

www.gfkrt.com/uk

- The total durables market declined -10.9% in April compared to the same month last year. This was driven by heavy falls in the DIY/gardening sector where poor weather had a disastrous effect on spending over the important Easter bank holiday weekend.
- There was better news for the household appliance sectors – month on month, the value attributable to small and major domestic appliances grew 15.7% and 8.9% respectively.
- In the consumer electronics sector, the audio/visual segment grew for the first time since June 2010. Here, the televisions category is key and factors influencing positive results include the launch of new models as well as events such as the forthcoming European football and continuing digital switchover.

Which Sectors Have Driven the Market Year on Year?

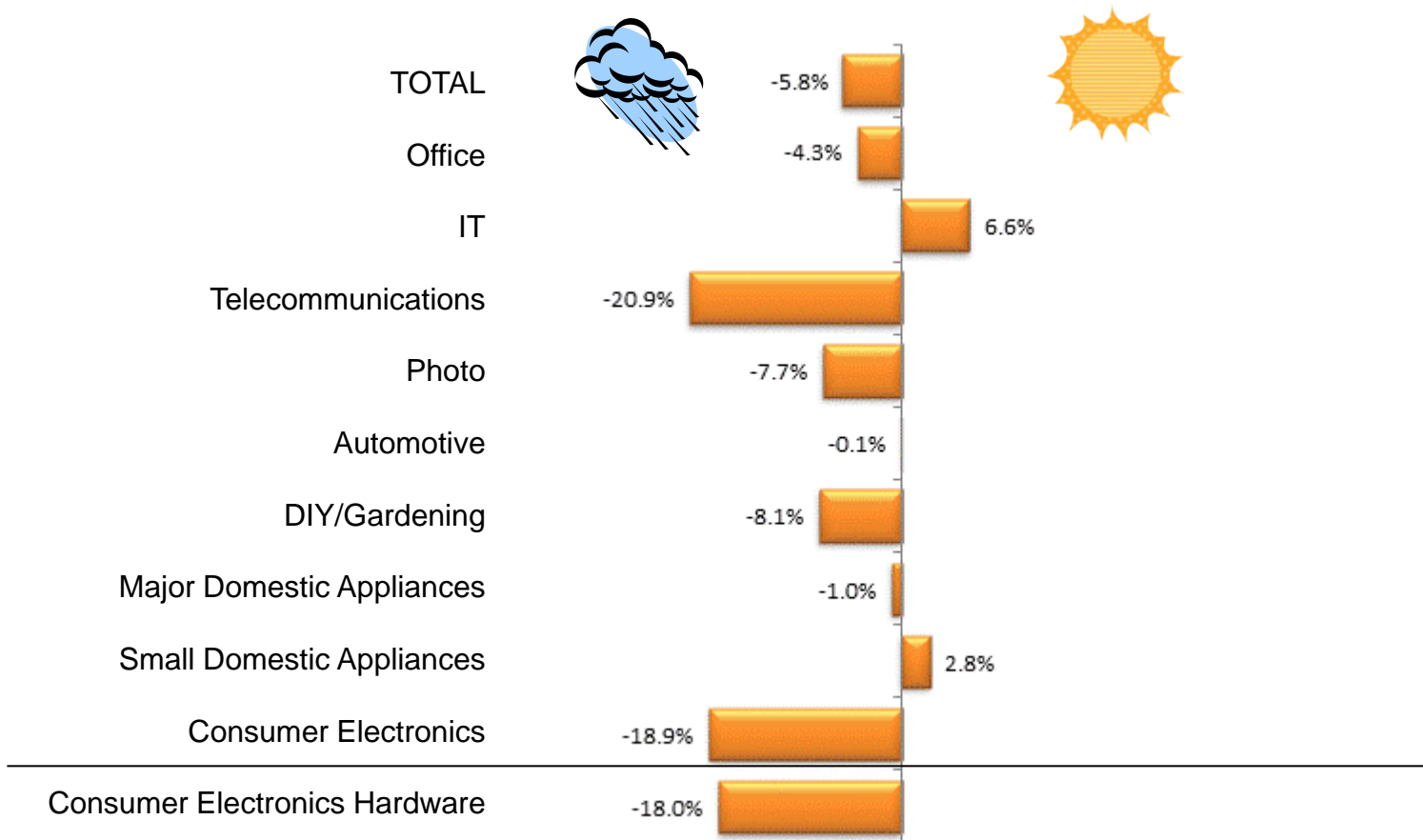
Year on Year % Growth in Value
(the latest moving annual total versus the previous moving annual total)



Which Sectors Have Driven the Market Year to Date?

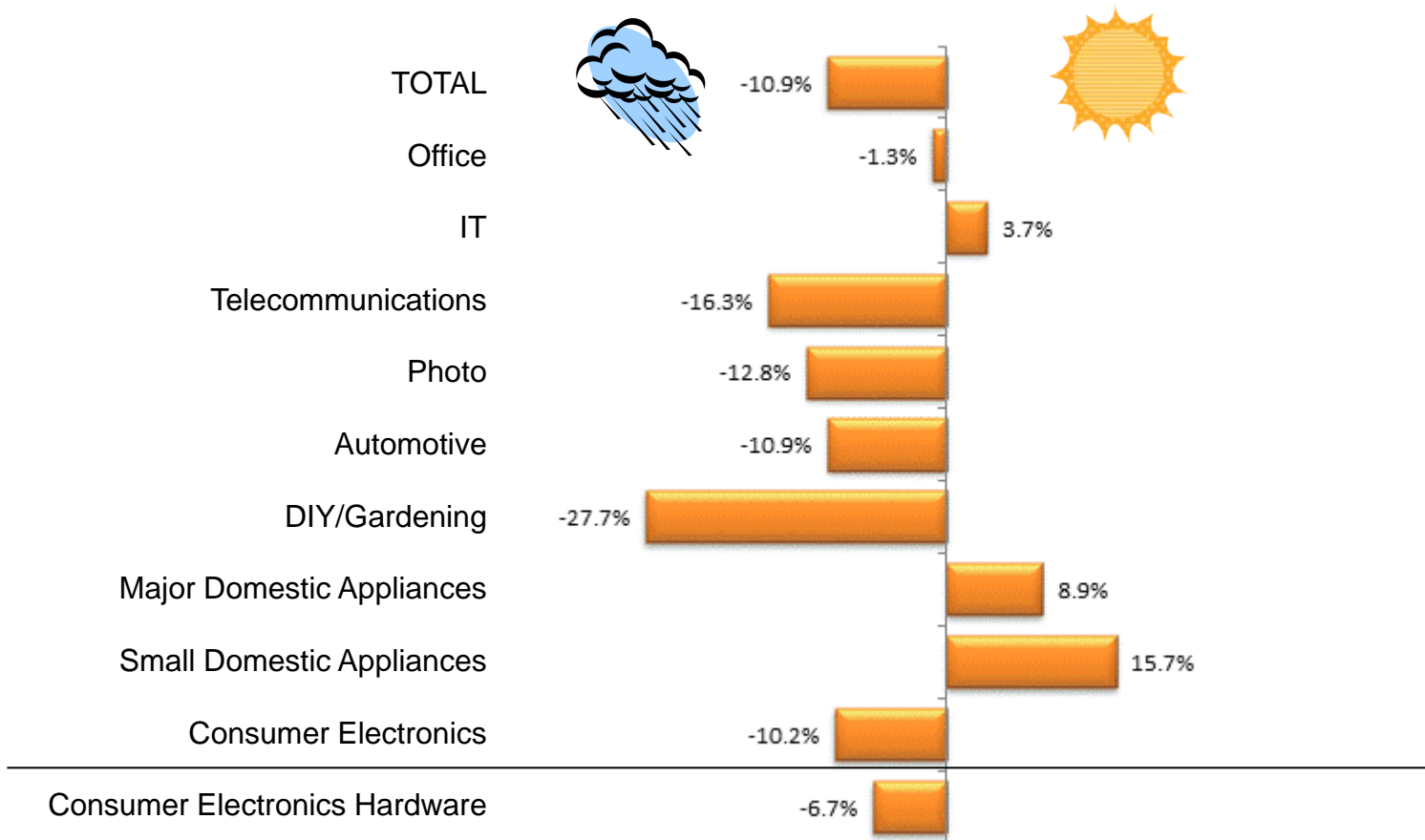
Year to Date % Growth in Value

(value so far this year versus the same period last year)



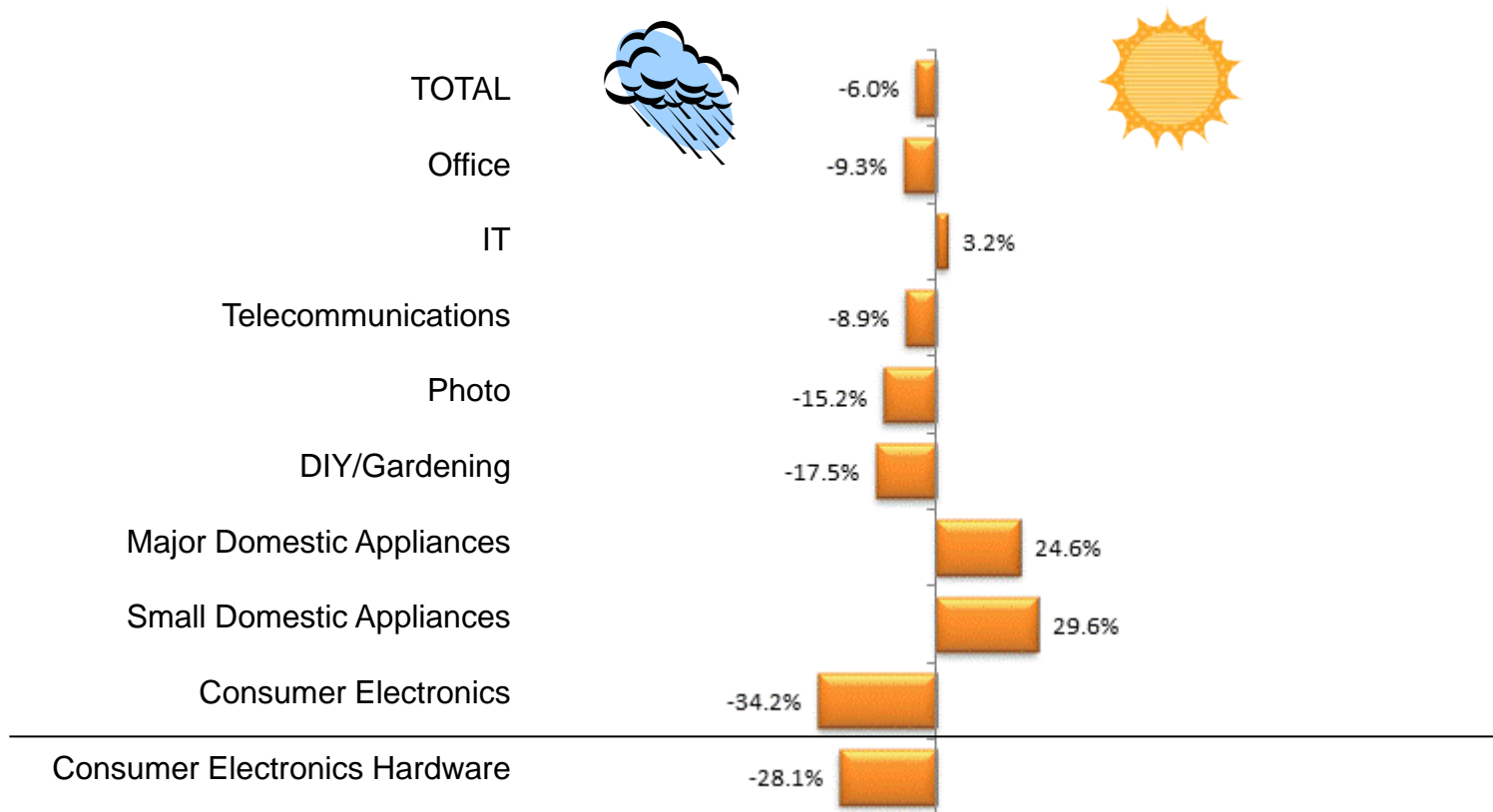
Which Sectors Have Driven the Market Month on Month?

Month on Month % Growth in Value
(this month versus the same month last year)



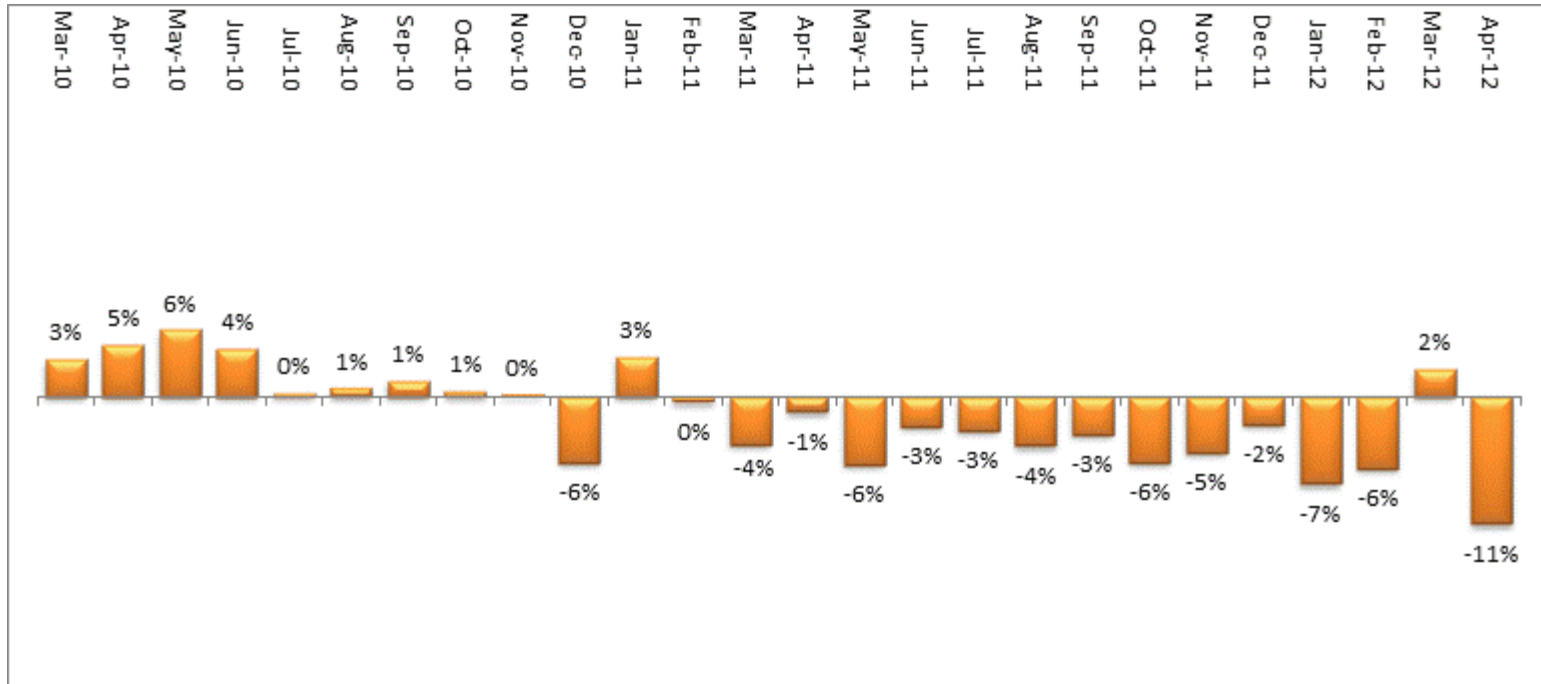
How are Online Sales Performing Month on Month?

Month on Month % Growth in Online Sales
(this month versus the same month last year)



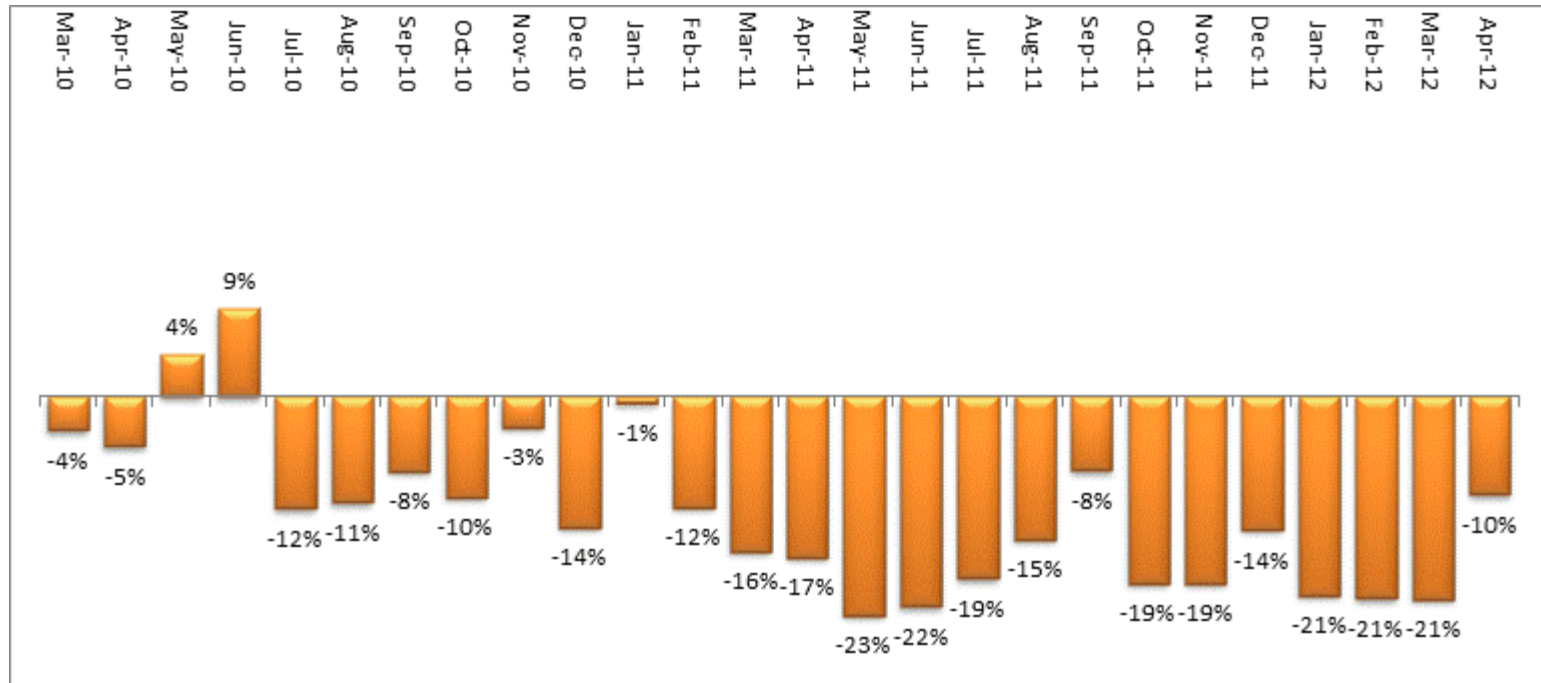
How Has the Total Durables Market Performed?

Month on Month % Growth in Total Market Value
(this month versus the same month last year)



How Has the Consumer Electronics Sector Performed?

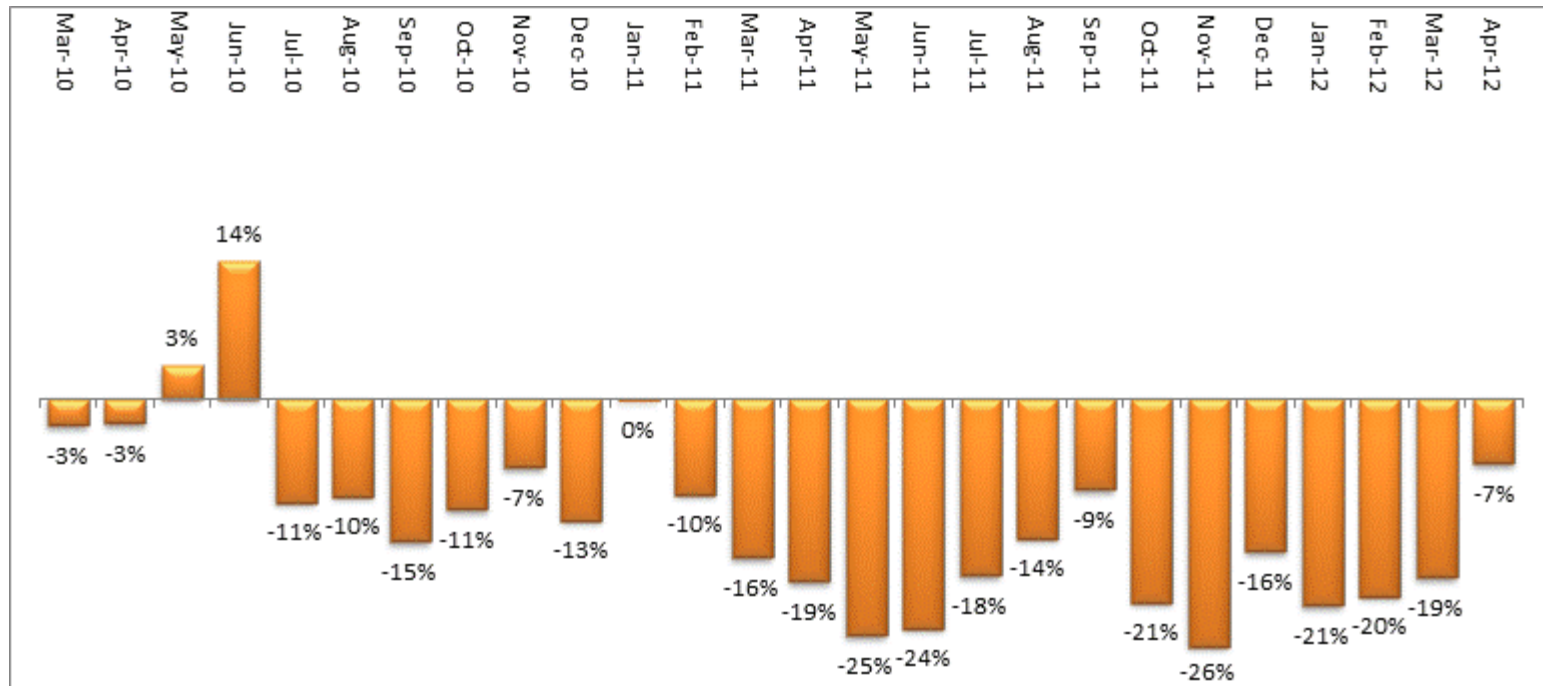
Month on Month % Growth in Sector Value
(this month versus the same month last year)



How Has the Consumer Electronics Hardware Sector Performed?



Month on Month % Growth in Sector Value
(this month versus the same month last year)

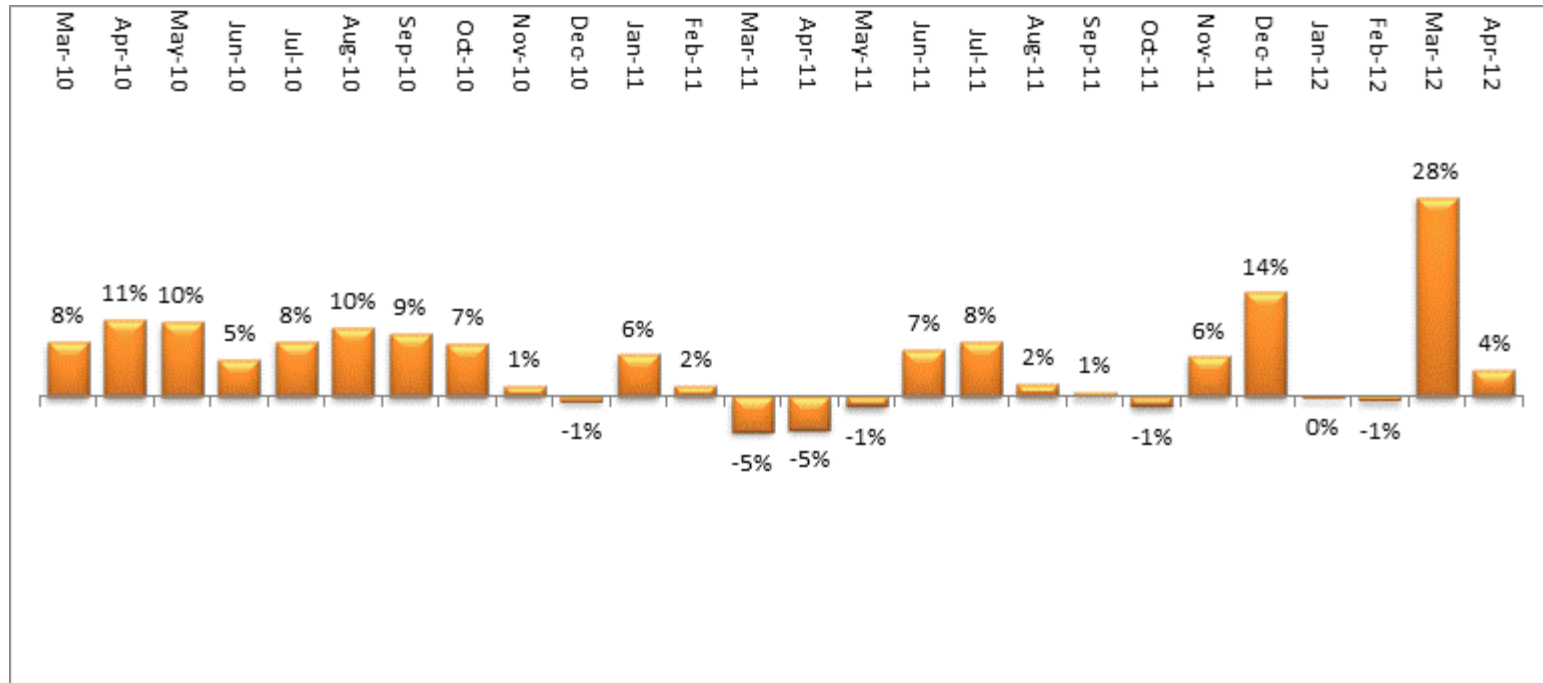


Despite the UK economy re-entering recession, there are glimmers of hope for the consumer electronics sector. The overall decline slowed whilst the audio/visual segment showed its first month on month increase since June 2010. With events such as the European football and London Olympics on the way, the televisions product category may well receive a further boost over the next few months.

How Has the IT Sector Performed?



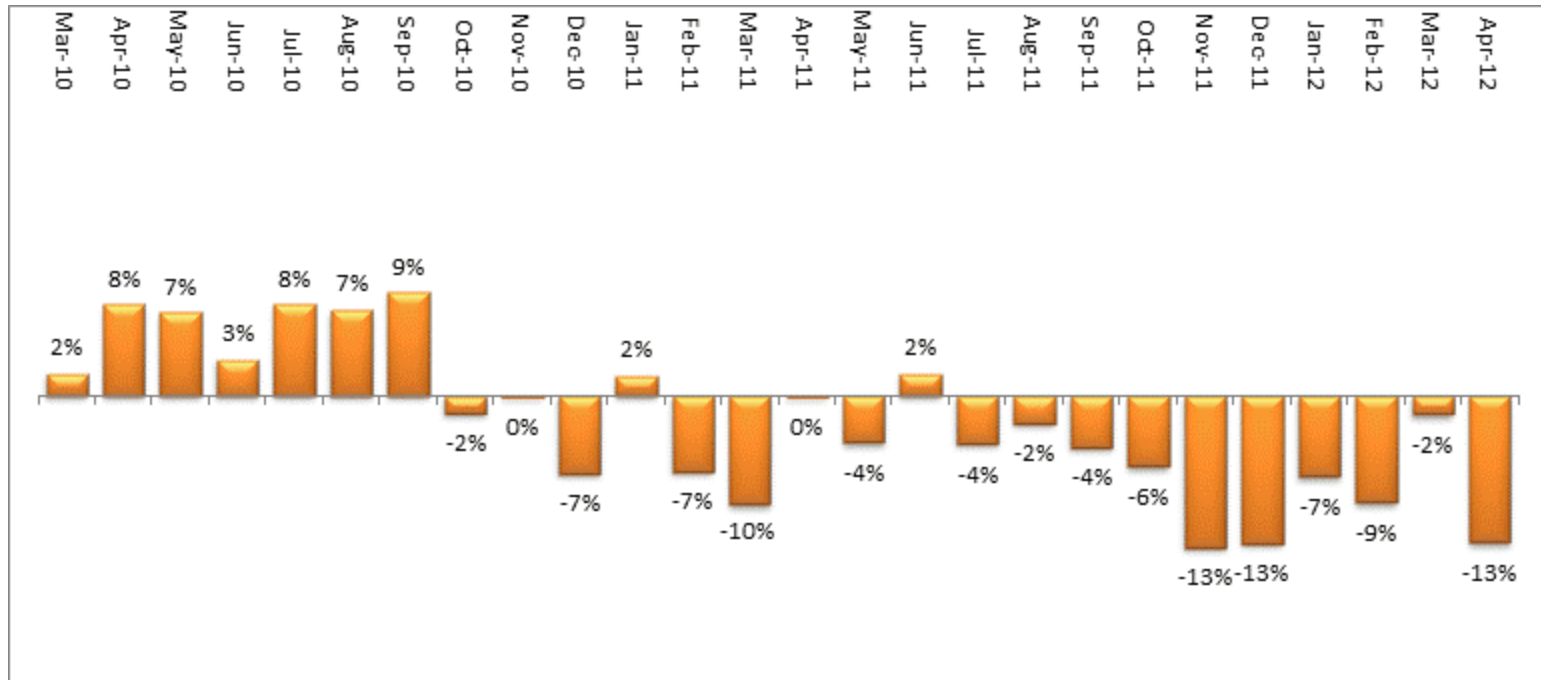
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Retail sales were more positive than business to business in April, with web books continuing to drive growth along with electronic assistants and networking products.

How Has the Photo Sector Performed?

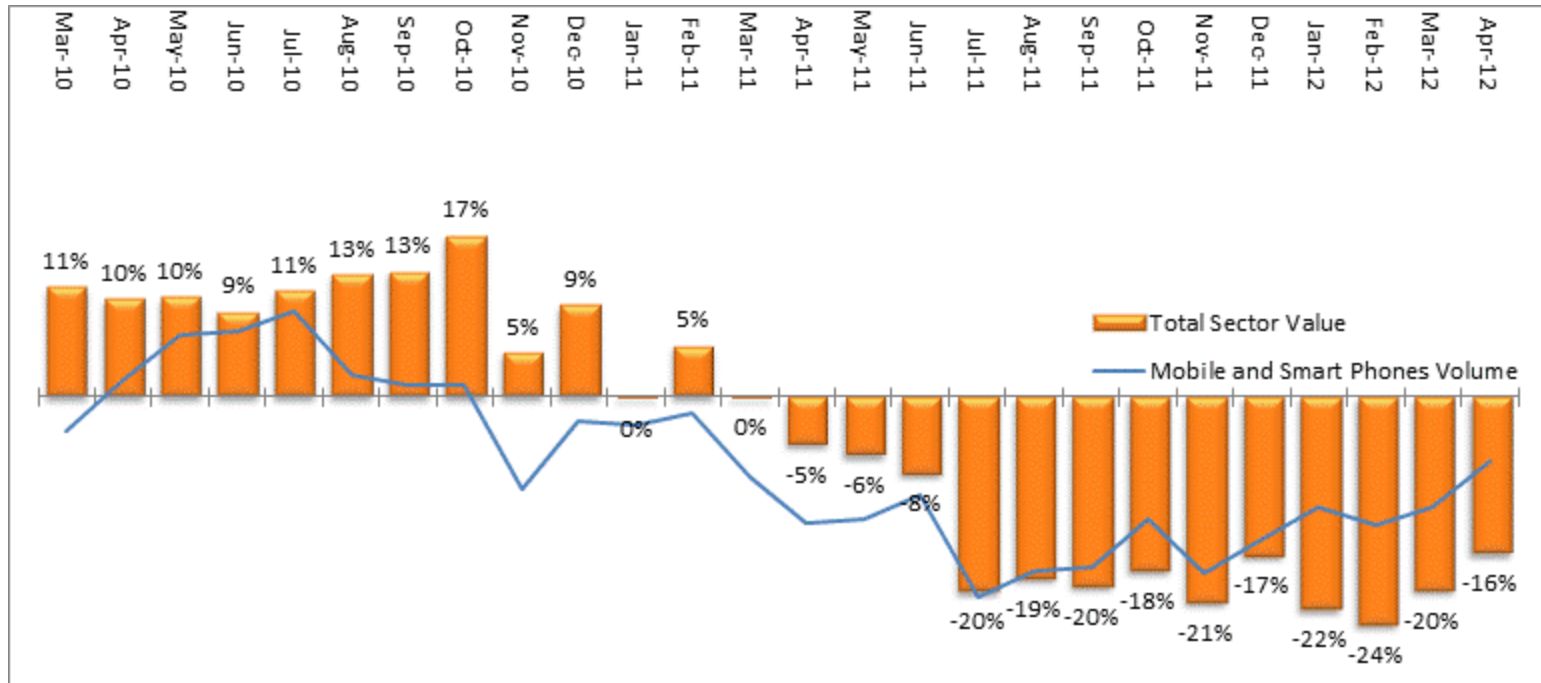
Month on Month % Growth in Sector Value
(this month versus the same month last year)



The continuing decline in the photo sector is driven by a volume and value drop in standard compact cameras as smart phones continue to cause cannibalisation.

How Has the Telecommunications Sector Performed?

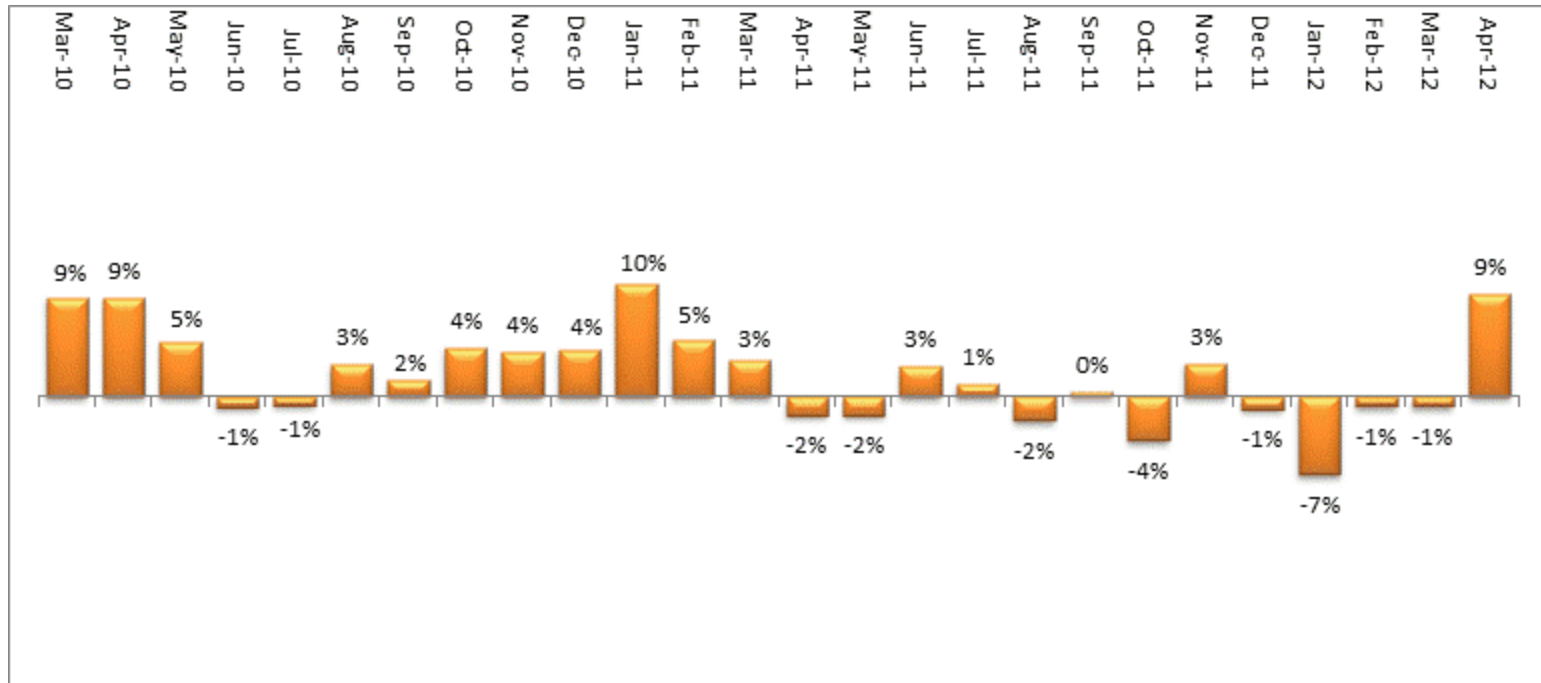
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Whilst the pre pay segment continues to drive the overall decline in the telecommunications sector, the mobile broadband market has seen encouraging growth in April. The increase here can be attributed to a key device launch within the web books product category.

How Has the Major Domestic Appliances Sector Performed?

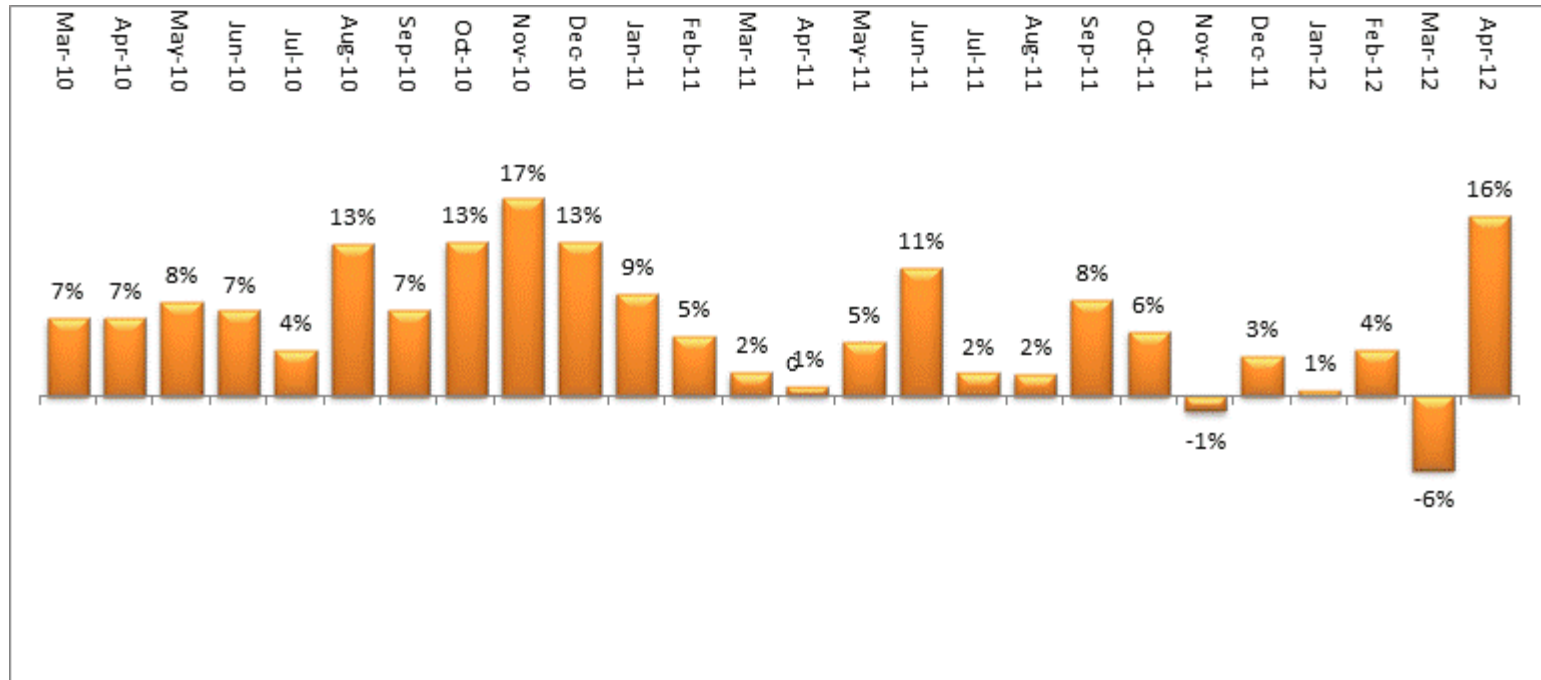
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Strong growth in the major domestic appliances sector is driven by the cooking and washing machines product categories which grew 14% and 9% respectively month on month.

How Has the Small Domestic Appliances Sector Performed?

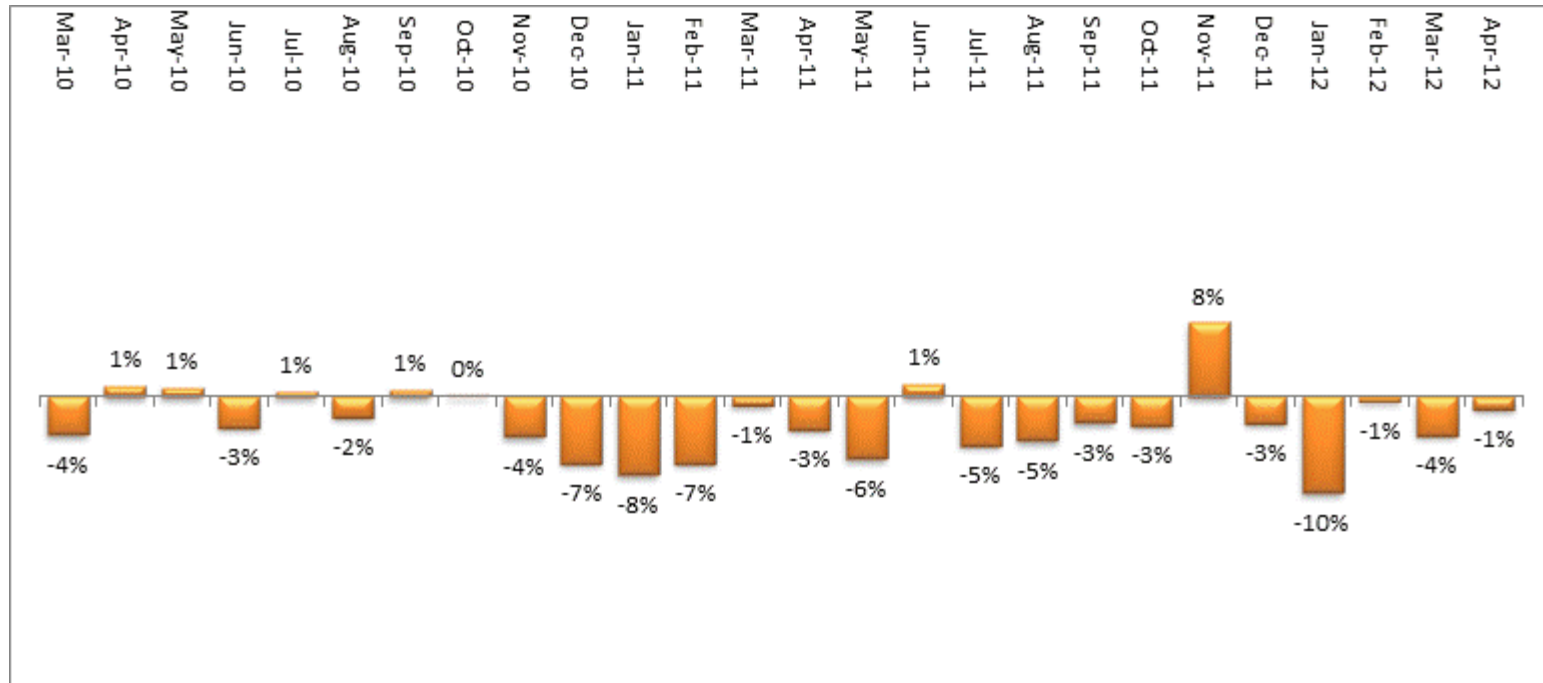
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Vacuum cleaners – the largest value contributor to the small domestic appliances sector – grew 12% on April last year. In the kitchen, kettles and toasters grew 13% and 15% respectively month on month.

How Has the Office Sector Performed?

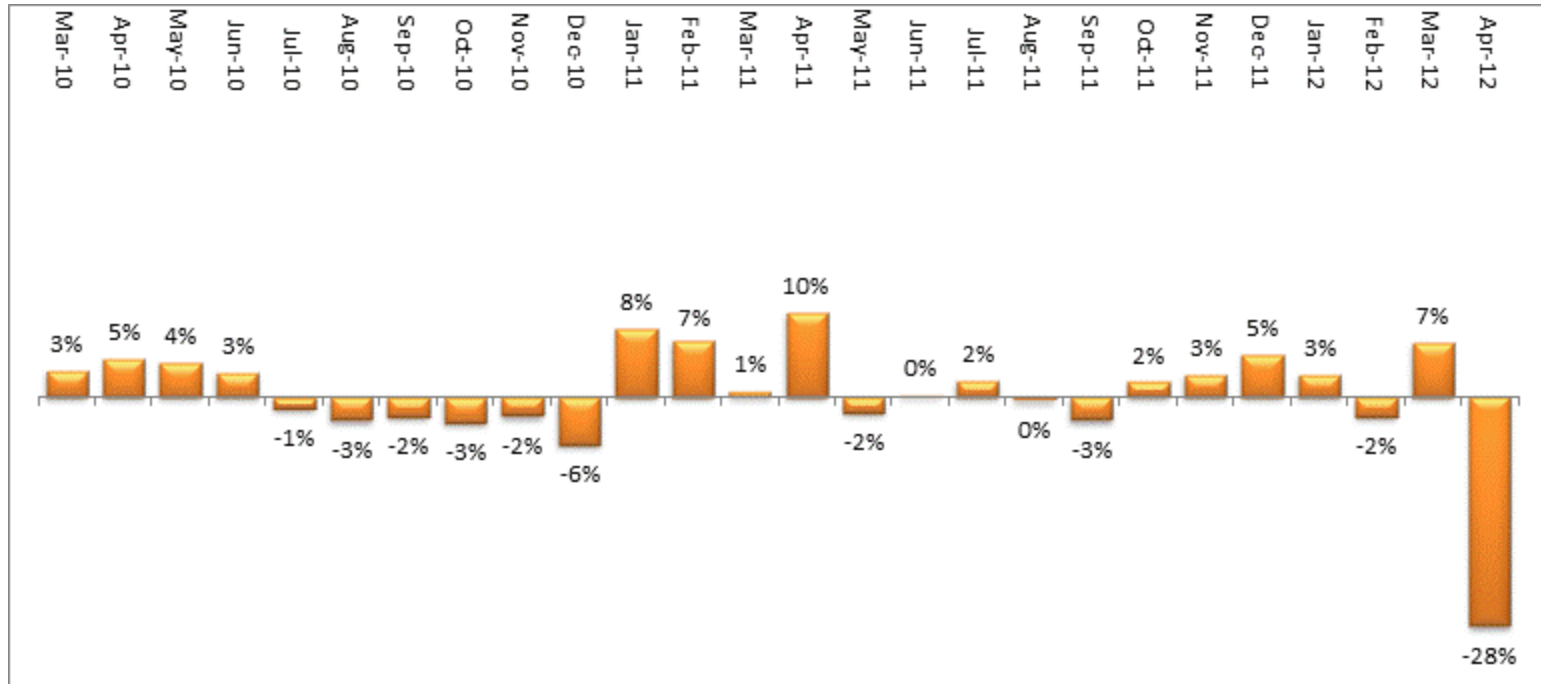
Month on Month % Growth in Sector Value
(this month versus the same month last year)



There are mixed results across the stationery segment – highlighters and felt pens both grew 20% month on month whilst correction products and repositionable notes declined 10% and 14% respectively.

How Has the DIY/Gardening Sector Performed?

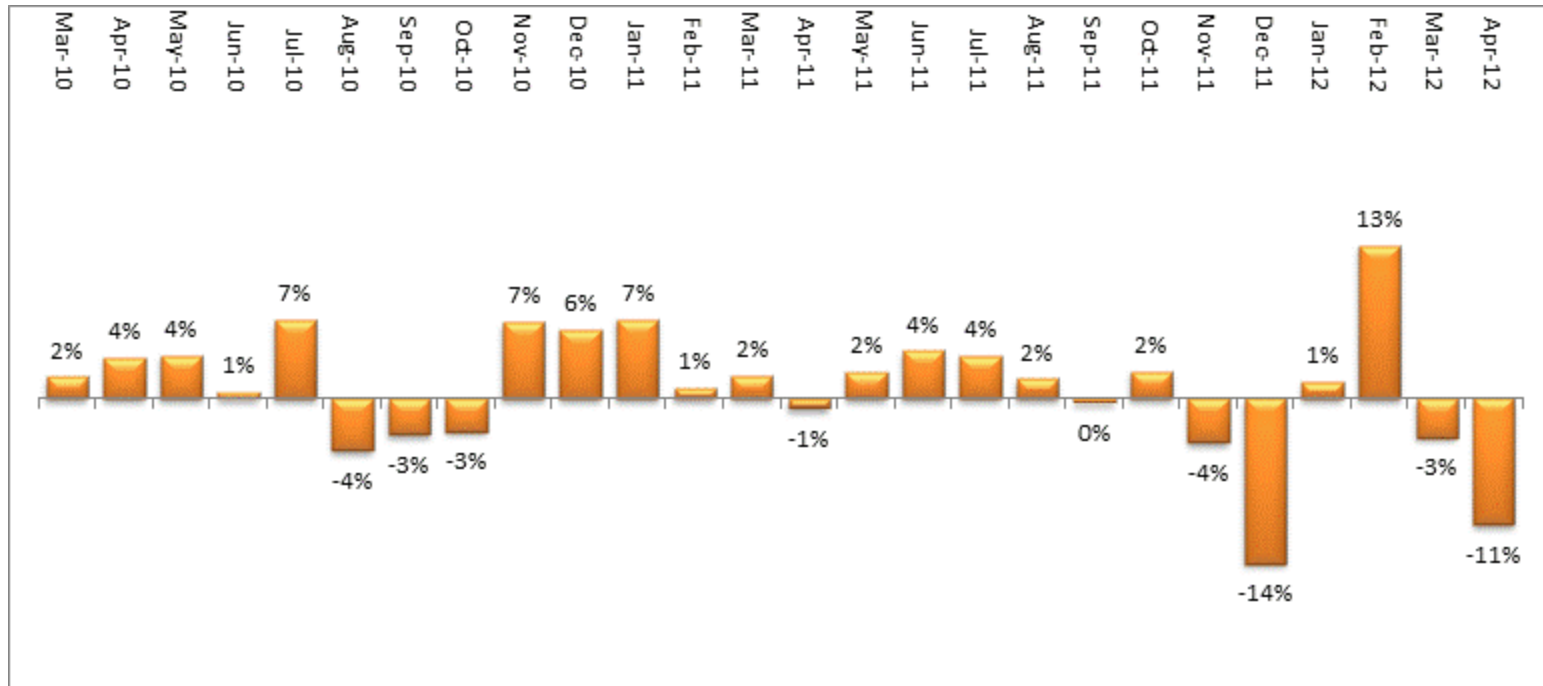
Month on Month % Growth in Sector Value
(this month versus the same month last year)



The disastrous decline in the DIY/gardening sector was driven by poor April weather, which impacted heavily sales of garden related products as consumers stayed indoors.

How Has the Automotive Sector Performed?

Month on Month % Growth in Sector Value
(this month versus the same month last year)



Continued decline in the cleaning product categories drove the fall in the automotive sector. The paint care category fell by 28% on April last year, while wheel cleaners declined by 48%. This was largely weather related.

For Further Insight and Enquiries:

Lucy Whittington | UK Communications Assistant | lucy.whittington@gfk.com | +44 870 603 8270

Ami Brooks | UK Marketing Manager | ami.brooks@gfk.com | +44 870 603 8247

Useful Information

Distribution Channels Tracked

Product Categories Tracked

Distribution Channels Tracked in the UK



Accurately tracking a universe of 79,000 shops via live electronic point of sale data delivered by the retailer on a weekly or monthly basis.

All major distribution channels are covered:

- Computer Shops
- IT B2B Channels
- Pure Players
- Telecommunications Specialists
- Supermarket and Cash & Carry Stores
- Variety Chains
- Mail Order Houses
- Department Stores
- Book Stores
- Office, Stationers and Consumable Specialists
- DIY Superstores, DIY Specialists and Garden Centres
- Kitchen Specialists
- Car Accessories Retailers, Car Dealers and Car Audio Specialists
- Electrical Specialists
- Photo Specialists
- Chemists
- Jewellers
- Tyre Specialists

Product Categories Tracked



AUTOMOTIVE

ANTI FREEZE
BRAKE CLEANERS
DE-ICER
CARBURETTOR CLEANERS
CHROME/ALUMINIUM CLEANERS
CONTACT SPRAY/RUST RELEASERS
ENGINE CLEANERS/DEGREASERS
ENGINE OILS
ENGINE AND PETROL ADDITIVES
EXHAUST REPAIR/MAINTENANCE
GENERAL CLEANER
GLASS CLEANER/RAIN REPELLANTS
OTHER LUBRICANTS
PAINT CARE PRODUCTS
PLASTIC/SYNTHETIC CLEANERS
SCREENWASH
TEMPORARY TYRE REPAIR
TROLLEY/CAR SEAT
TYRE CLEANERS
UPHOLSTERY CLEANER
WHEEL CLEANER

Major Domestic Appliances

Cookers and Ovens
Fridges/Fridge Freezers
Dishwashers
Freezers
Hobs
Hoods
Microwave Ovens
Spin Dryers
Tumble Dryers
Washing Machines

DIY/Gardening

ALERT DETECTORS
AXES AND ACCESSORIES
BENCHTOP MINI TOOLS
BENCHTOP TOOLS
BOLT CUTTERS
CHISELS/BOLSTERS
COMPACT FLUORESCENT LAMPS
DECORATIVE GARDEN PRESERVES
DECORATIVE EQUIPMENT
DECORATIVE PLASTER
DIY ADHESIVE TAPES
DIY ADHESIVES
DRILLS AND BRACES
ELECTRIC CROW BARS
ELECTRIC DRILLS
ELECTRIC GLUE GUNS
ELECTRIC HEAT GUNS
ELECTRIC POWER FILES
ELECTRIC SCRAPERS
ELECTRIC LASER LEVELS
ELECTRIC ANGLE GRINDERS
ELECTRIC PLANERS
ELECTRIC ROUTERS
ELECTRIC SANDERS
ELECTRIC SAWS
ELECTRIC TACKERS
ELECTRIC PAINT ROLLERS
ELECTRIC ROTARY HAMMERS
DIY RULERS
SCREW DRIVERS
SEALANTS
SEALERS AND WATERPROOFERS
SHOWERS
SOCKETS AND RATCHETS
SOIL CONDITIONER
SPECIAL HAND TOOLS
SPECIAL PAINTS

ELECTRIC SCREW DRIVERS
ELECTRIC SPRAY GUNS
ELECTRIC WALLPAPER STRIPPERS
EMULSION PAINT
FERTILIZERS
FILLERS
FLUORESCENT LAMPS
GARDEN HAND TOOLS
GARDEN HAND SHEARS
GRIPPING TOOLS
GROWING MEDIA
HALOGEN LAMPS
HAMMERS
HAND LAWNMOWERS
HAND FILES
HAND PLANERS
HAND SAWS
HOUSEHOLD INSECTICIDES
HIGH PRESSURE CLEANERS
HOSE END ATTACHMENTS
HOSES AND STORAGE
INCANDESCENT LAMPS
INTRUDER SECURITY
KNIVES AND BLADES
LAWN SEED
LAWN SPREADER
LED LAMPS
LEVELS
STAPLE GUNS
TILE ADHESIVES
TILE GROUT
TILES
TOOLSETS AND STORAGE
TRIM PAINT
TRIMMERS/BRUSHCUTTERS
VARNISH
WALL COVERINGS

MARKING OUT TOOLS
MEASURING TAPES
METAL PAINTS
MINI TOOLS
MOULDINGS AND COVINGS
MULTI TOOLS
WOOD FINISH
OUTDOOR BARBEQUES
PAINT BRUSHES
PAINTING AIDS
PAINT AND VARNISH REMOVER
PLANT AUXILIARY PRODUCTS
PLANT PROTECTION
PLIERS
POWERED CHAIN SAWS
POWERED LAWNMOWERS
POWERED SCARIFIERS
POWERED BLOW VACS
POWER TOOL ACCESSORIES
POWERED GRASS SHEARS
POWERED HEDGE TRIMMERS
POWERED SHREDDERS
PRIMERS/UNDERCOATS
PRUNING SAWS
PU FOAM
PUMPS
RENOVATION CLEANERS
RIVETERS
WALL DECORATIONS
WATER TIMERS
WILD BIRD CARE
WOOD FILLERS
WOOD STAIN
WOOD TREATMENT
WORKBENCHES
WRENCHES

Product Categories Tracked



Office

Binding Systems	Correction Products
Electronic Assistants	Crayons
Laminating Accessories	Fountain Pens
Luggage	Graphite Pencils
Calculators	Highlighters
Laminating Systems	Lever Arch Files
Lettering Machinery	Markers
Office Adhesives	Mechanical Pencils
Repositionable Notes	OHP Pens
Shredders	Perforators
Office Adhesive Tapes	Rollerballs
Ballpoint Pens	Staplers
Print Cartridges	Suspension Filing Systems
Coated Paper	Writing Feltpens
Colour Feltpens	Office Non-Tracked Products
Colouring Pencils	

Small Domestic Appliances

Blood Pressure Monitors	Electric Beauty
Bread Makers	Food Preparation
Digital Thermometers	Hair Dryers
Food Steamers	Hair Styling
Fun Cooking	Hair Clippers
Mini Ovens	Ice Cream Makers
Air Conditioners	Irons
Air Treatment	Kettles
Bakeware	Pans
Can Openers	Personal Scales
Juice Extractors	Pots
Coffee Grinders	Pressure Cookers
Hot Beverage Makers	Rice Cookers
Deep Fryers	Sandwich Toasters
Dental Care Products	Shavers
Electric Blankets	Toasters
Electric Heating	Steam Cleaners
Electric Knives	Vacuum Cleaners

IT

Static Computers
Portable Computers
Monitors
Printers
Multifunctional Devices
Data/Video Projectors
Facsimiles
Scanners
Web Cameras
Communication Cards
CD/DVD Writers
Keying Devices
PC/Mini Speakers
Pointing Devices
TV Cards/Tuners
Storage Devices
Communication Devices
Power Management
Software
Small Organising Solutions
Gaming Devices
PC Games

Telecommunications

Fixed Line Telephones
Headsets
Mobile Phone Accessories
Mobile Phone Handsets
Mobile Phone Tariffs
Smart Phones

Consumer Electronics

CD Recording Media	Amplifiers
Video Tapes	Receivers
DVD Recording Media	Tuners
CRT Televisions	Radio Recorders
TV Recorders	Portable Radios
Video Recorders	Clock Radios
Portable Televisions	Dictation Systems
Panel Televisions	Headphones
Set Top Boxes	Headphone Stereos
DVD Players/Recorders	Universal Remote Controls
Digital TV Accessories	Digital Portable Audio Players
Battery Chargers	Digital Portable Video Players
Dry Batteries	Car Audio
USB Memory	Car Speakers
Camcorders	Car Navigation
MD Players/Recorders	Car Vision
Turntables	Videogames Consoles
Loudspeakers	Camcorder Powerpacks
CD Players/Recorders	Torches
Audio Home Systems	MP3 Accessories
Console Games	

Photo

Imaging Accessories
Binoculars
Non-Digital Cameras
Interchangeable Lenses
Digital Cameras
Films
Memory Cards
Image Displays