



GfK Market-i

An Insight into August 2012 UK Retail Durable Sectors

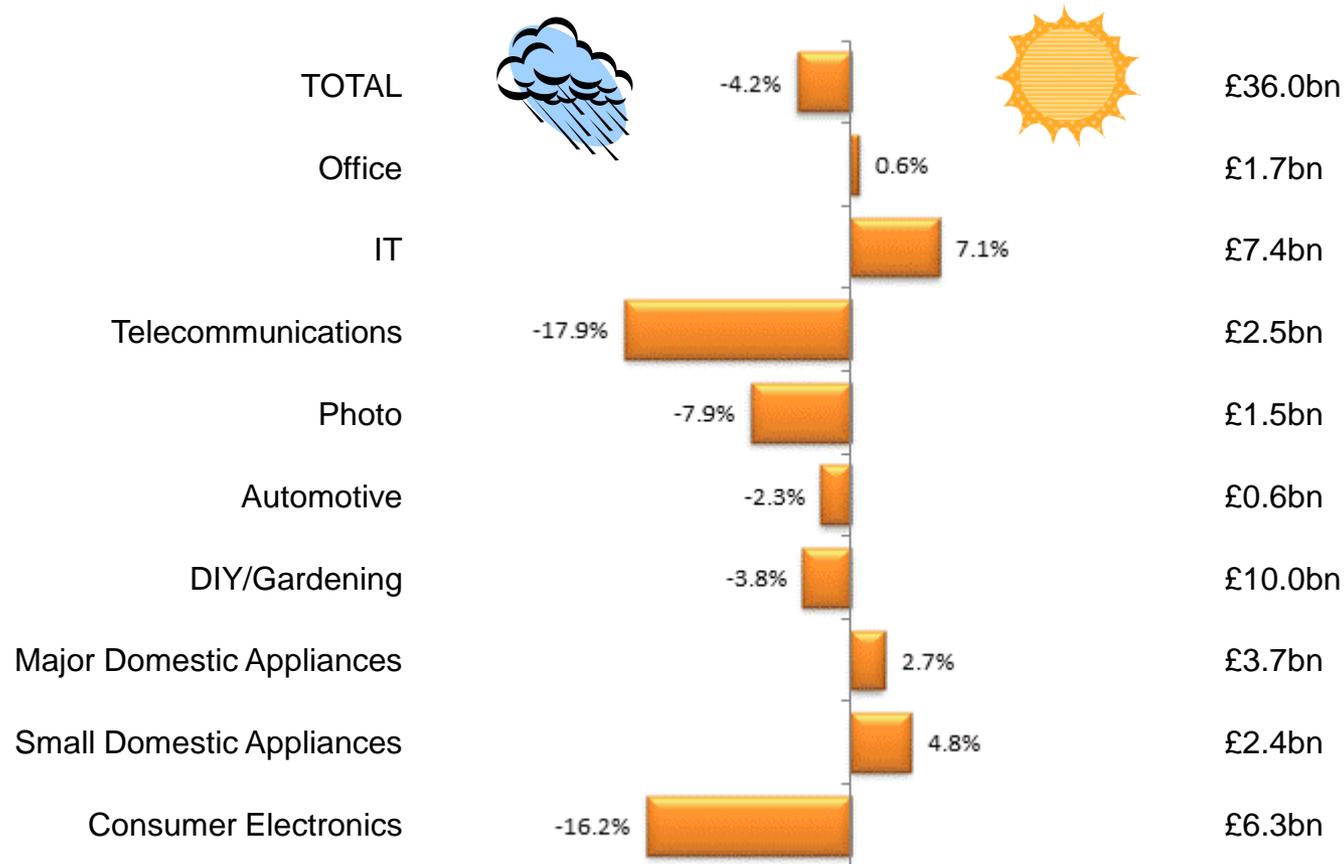
www.gfkrt.com/uk

- August saw the value attributable to the total durables market grow by 0.9% compared to the same month last year.
- The brief spell of month on month growth in the consumer electronics sector seen in July was not repeated in August. The sector declined - 12% compared to the same month year, driven by a fall in both volume and value of the key televisions product category.
- There was better news in the major and small domestic appliances sectors which grew 11% and 9.7% respectively on August last year. The DIY/gardening sector grew for the first time since March, up 3.3% month on month.
- As the end of summer approaches and events such as the Olympics fade to memory, retailers will need to be very savvy in order to maintain the growth seen over recent months.

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)

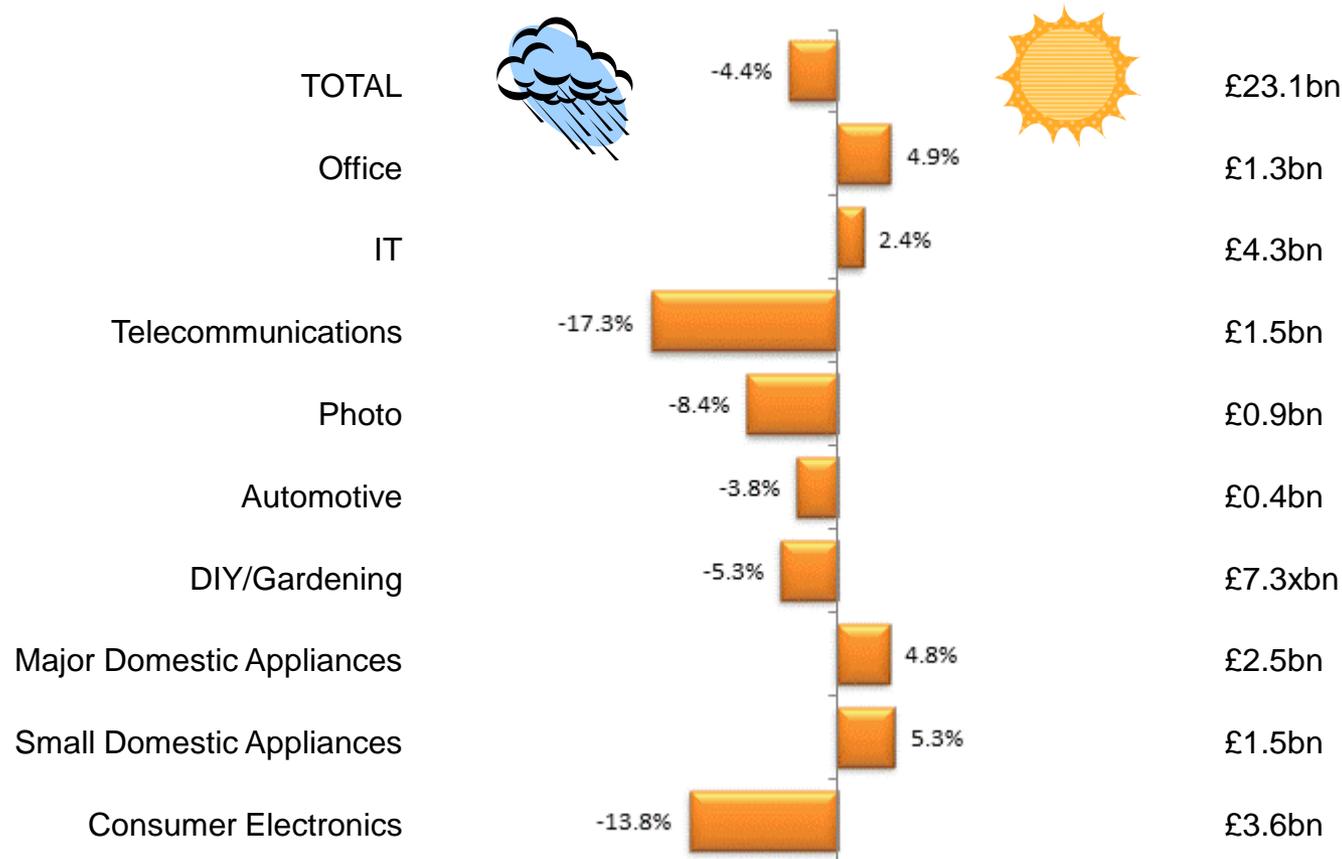
Market Value
Sep11-Aug12



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)

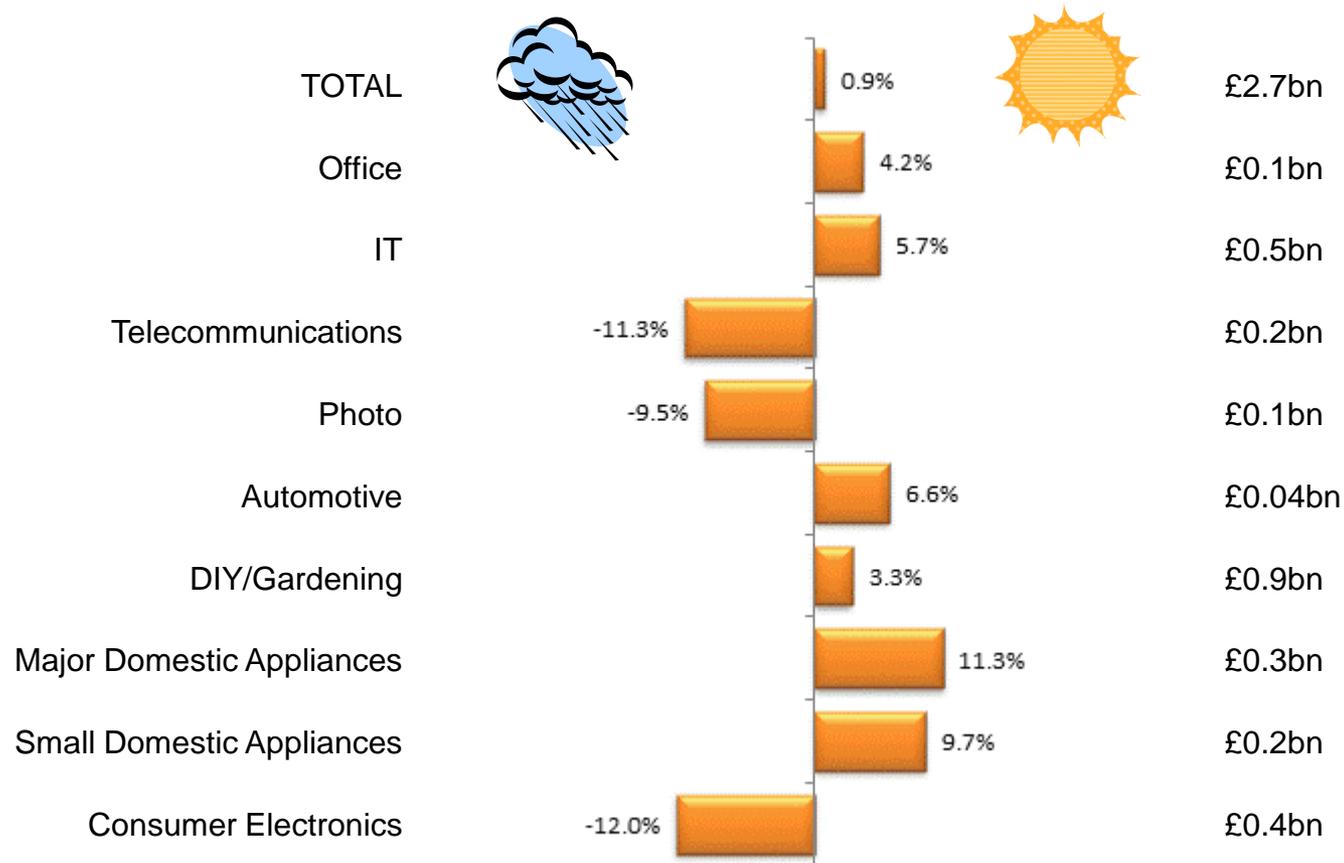
Market Value
Jan12-Aug12



Which Sectors Have Driven the Market Month on Month?

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

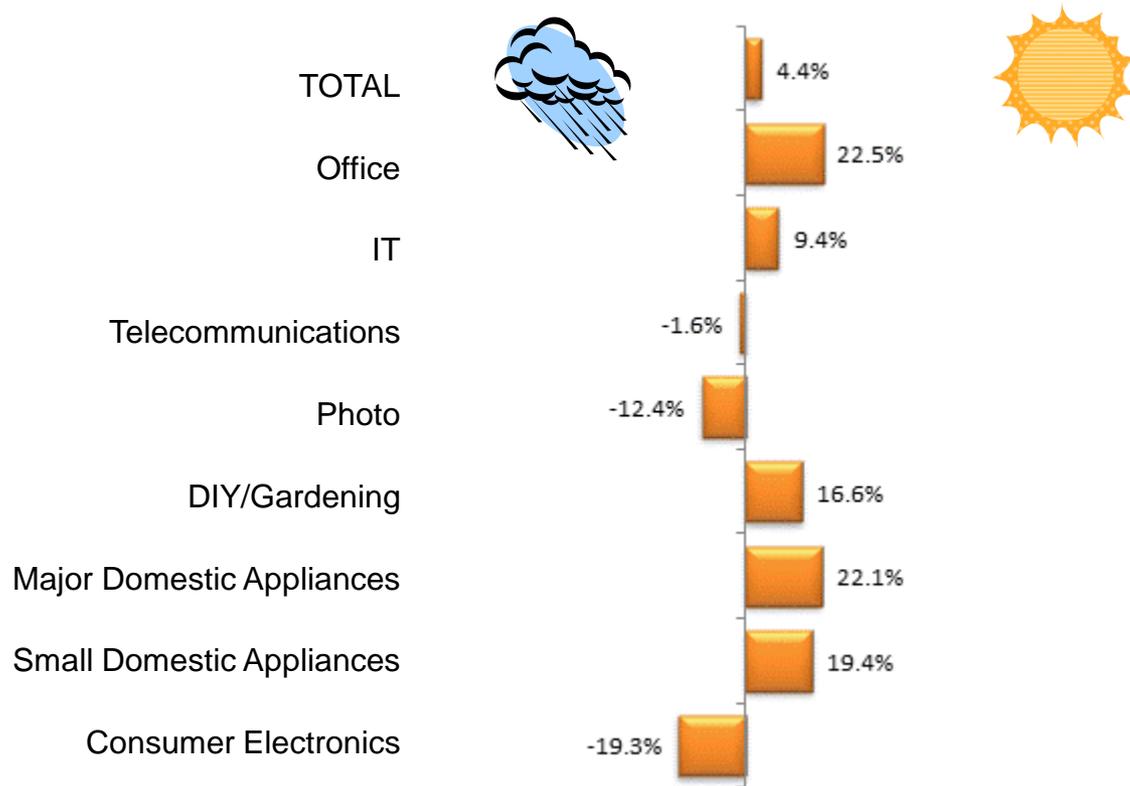
Market Value
Aug12



How are Online Sales Performing Month on Month?

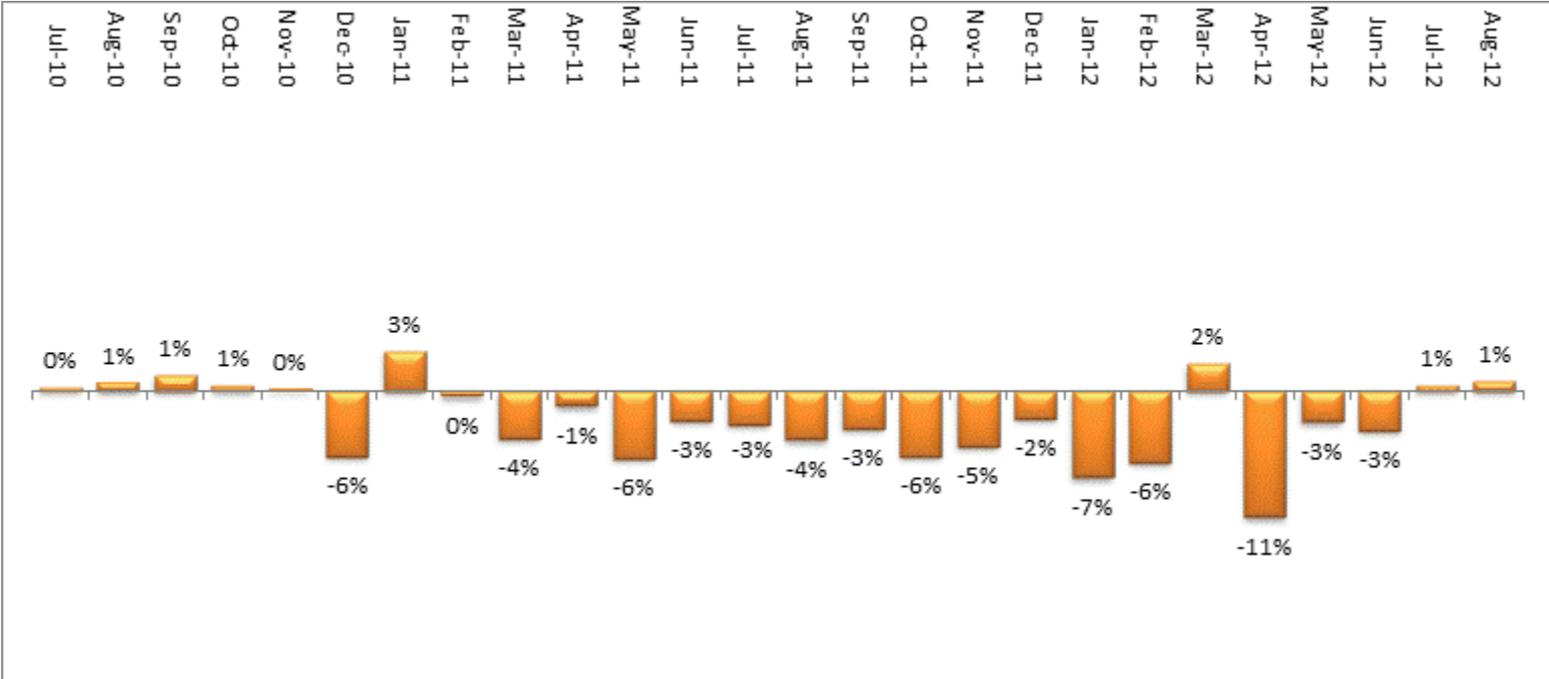


Month on Month % Growth in Online Sales
(this month versus the same month last year)



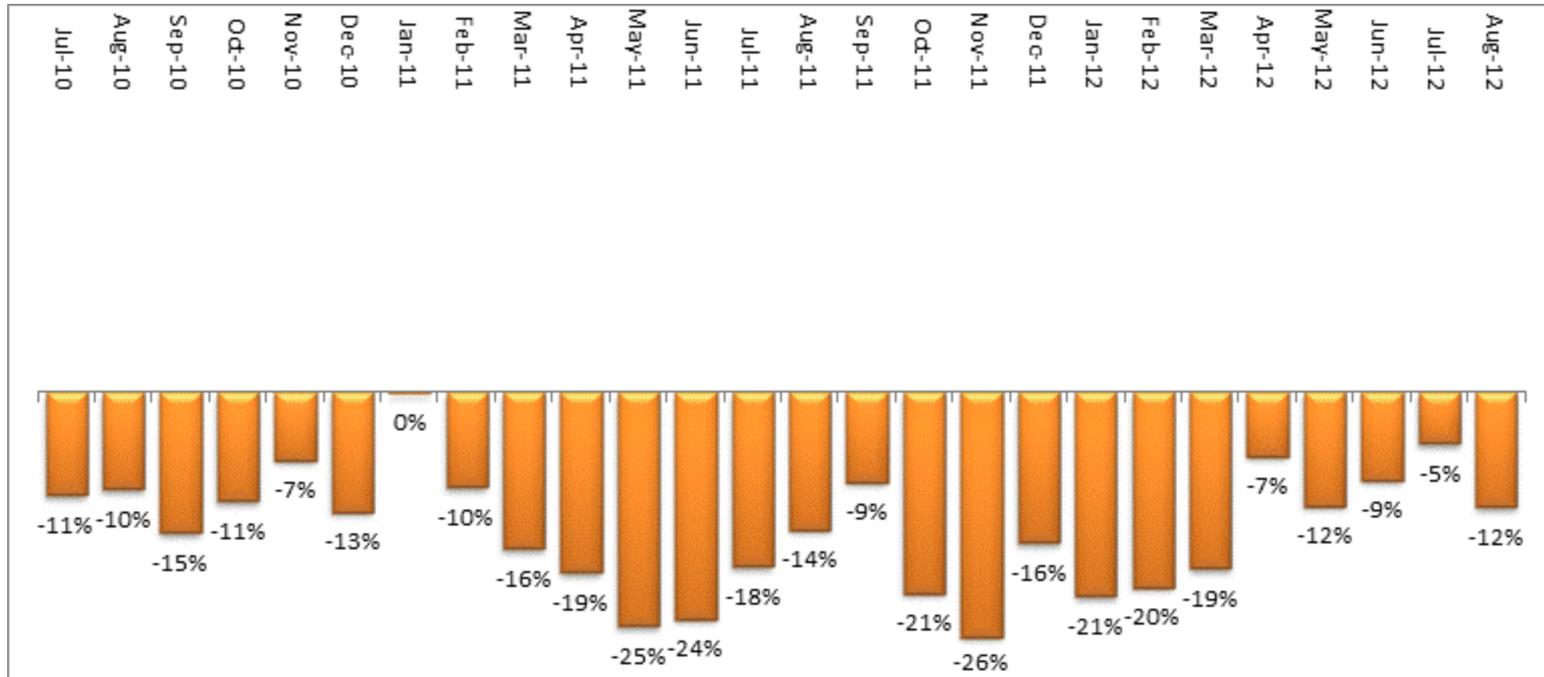
How Has the Total Durables Market Performed?

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



How Has the Consumer Electronics Sector Performed?

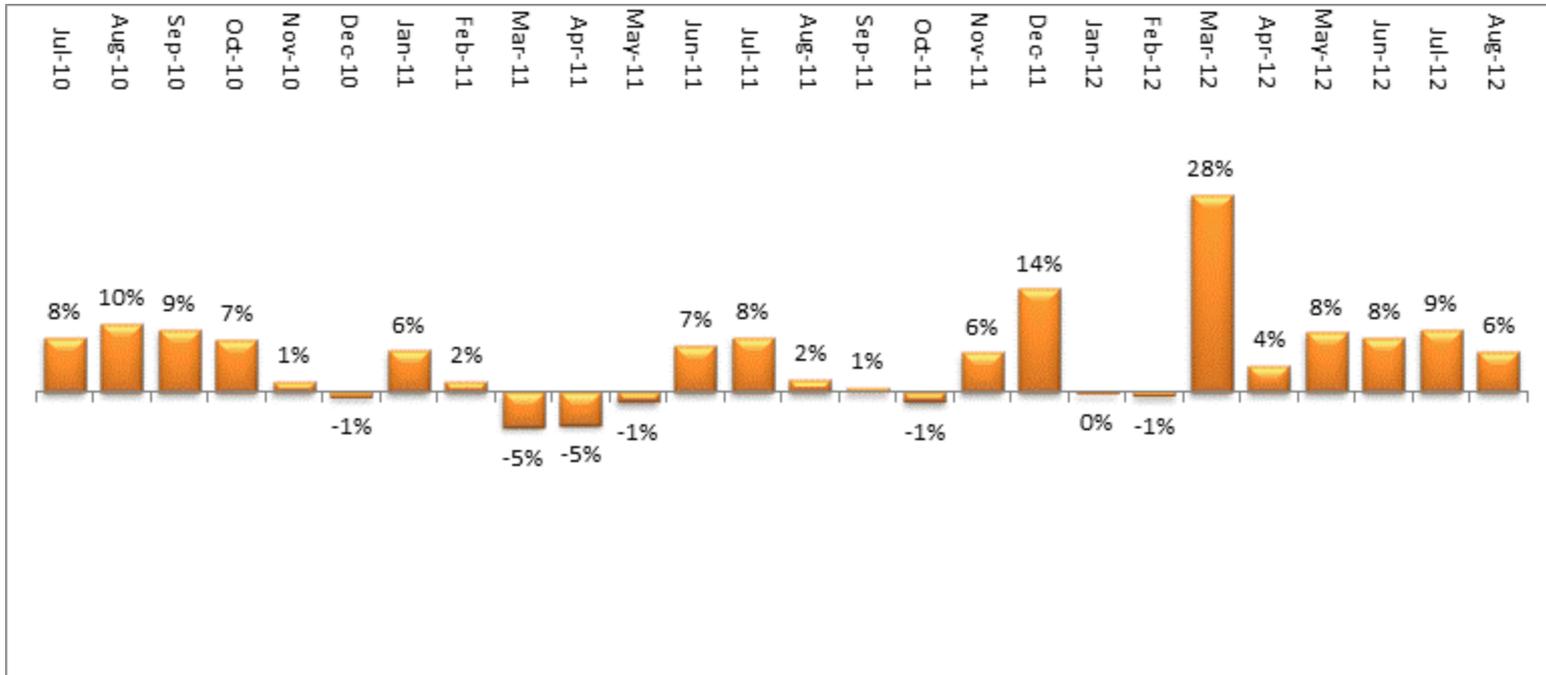
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Whilst there were some areas showing growth in August compared to the same month last year (such as headphones, up 9% and loudspeakers, up 8%) it was the televisions product category that dragged the sector back into double digit month on month decline, falling -13%.

How Has the IT Sector Performed?

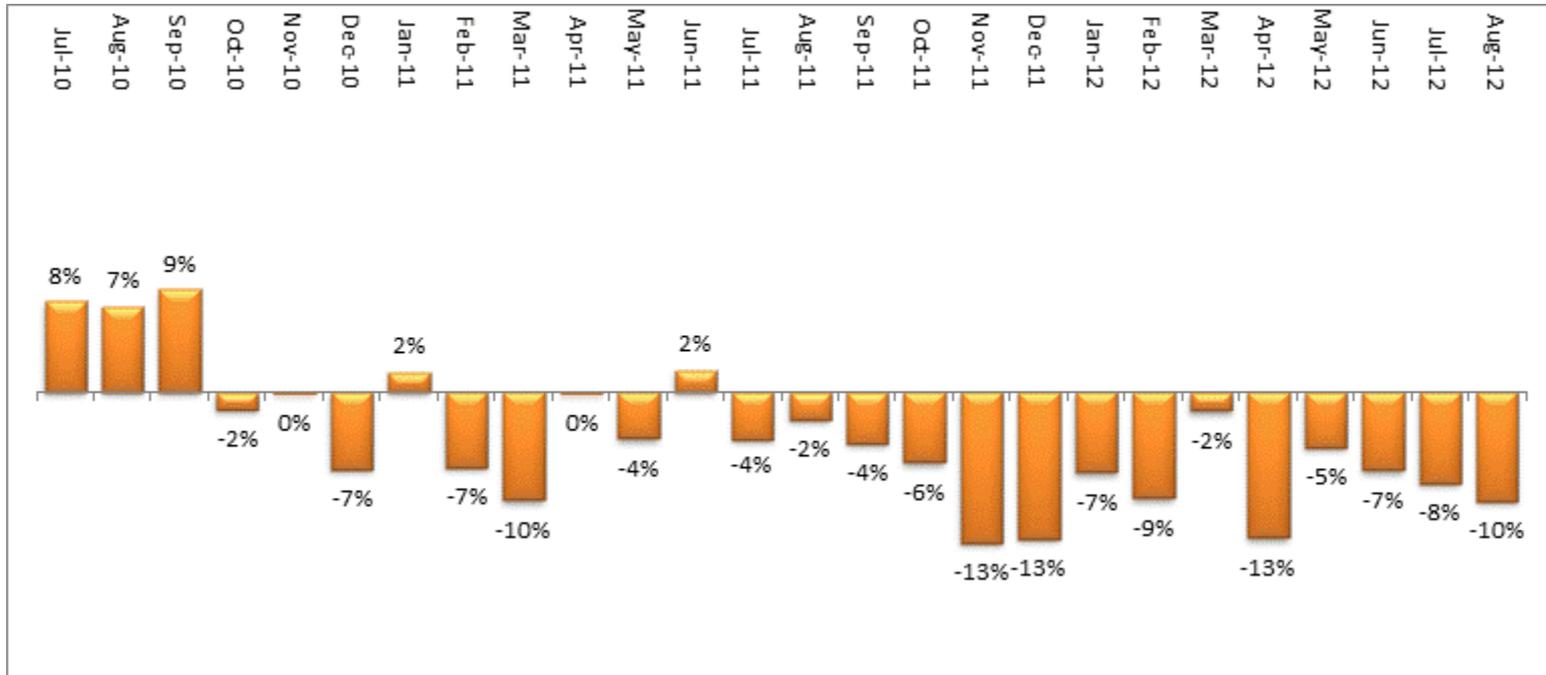
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Aside from more recent products, such as web books (tablets) and e-readers, only communication devices and USB memory showed any year-on-year volume growth for the IT sector, as consumers invest in networking and storage in our increasingly digital world.

How Has the Photo Sector Performed?

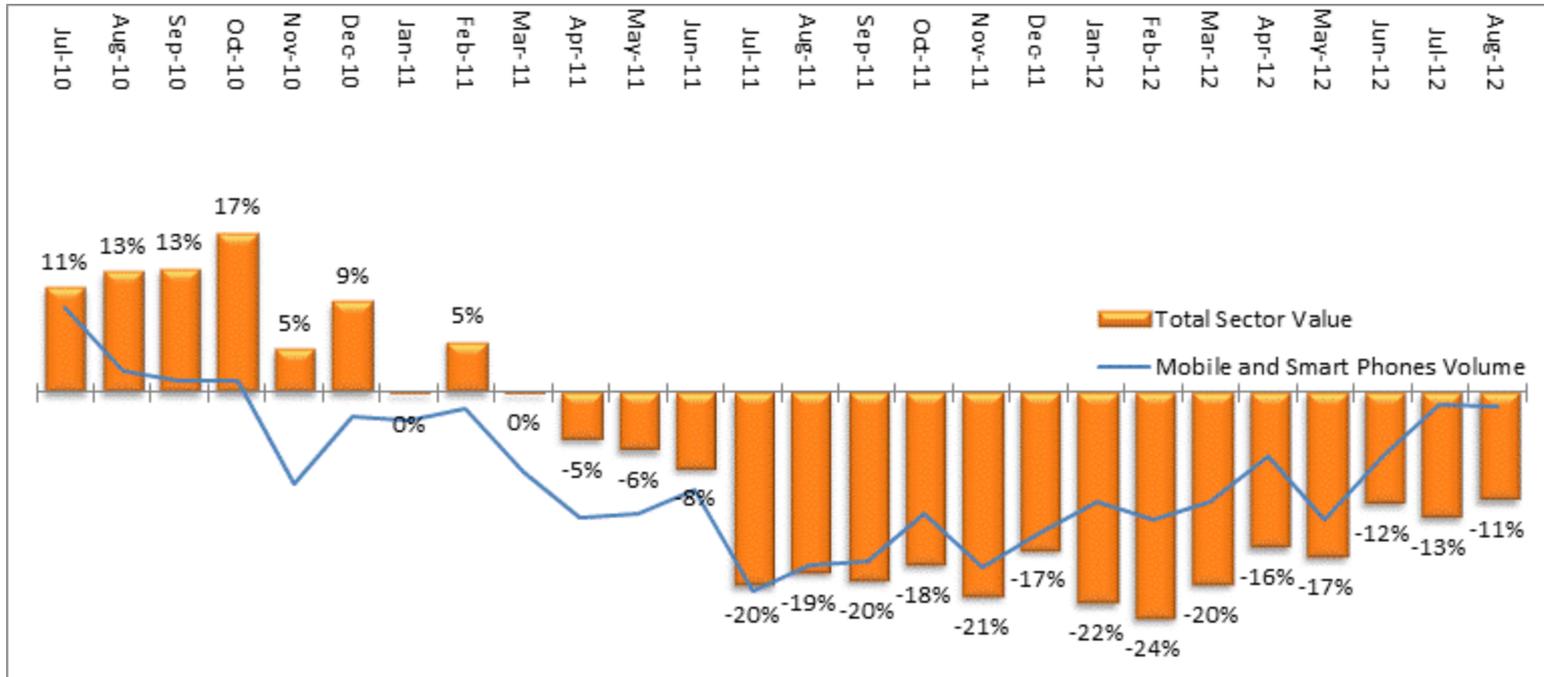
Month on Month % Growth in Sector Value
(this month versus the same month last year)



The continuing decline of digital cameras was underlined by the first month of decline since February for compact system cameras.

How Has the Telecommunications Sector Performed?

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

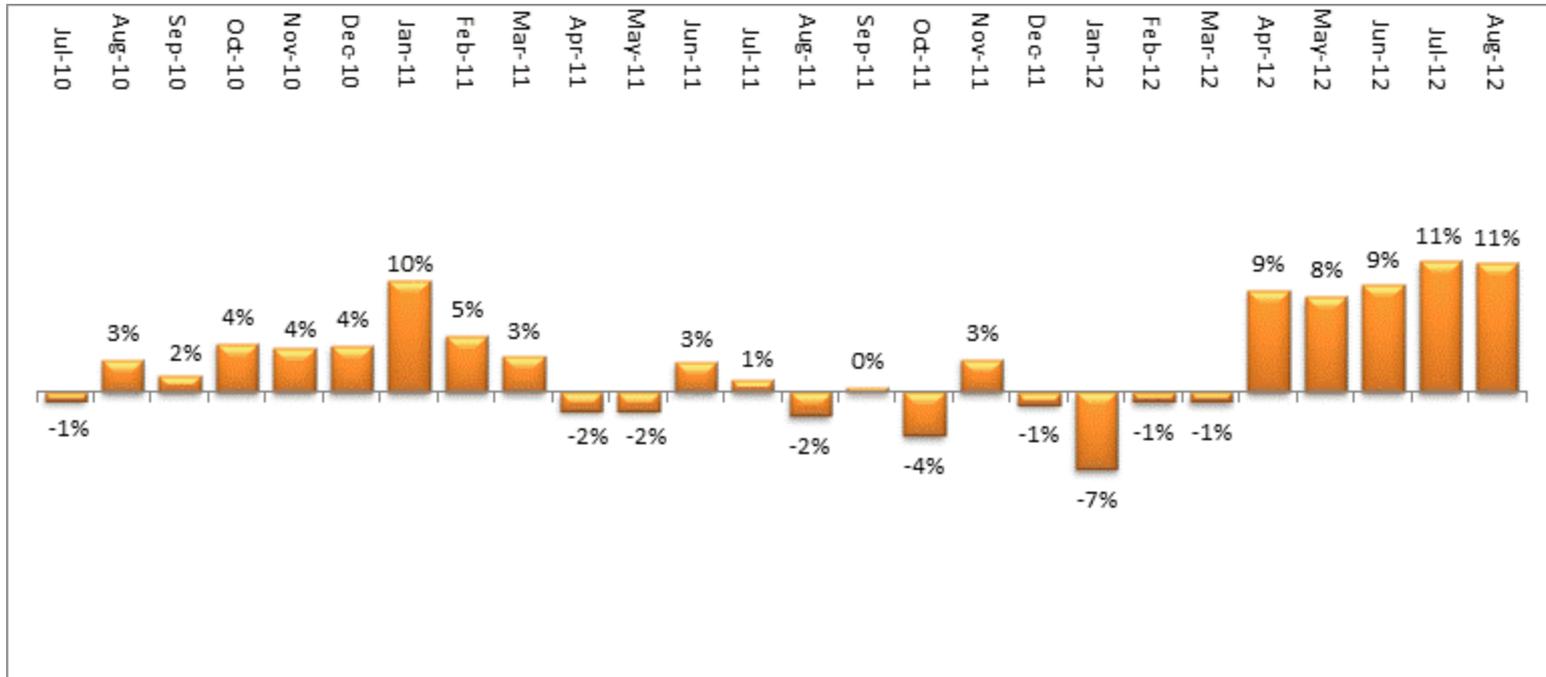


In the last two months, the market has returned to a near flat volume growth picture. This is because July and August 2011 saw the big declines in the prepay market start following government legislation on mobile termination rates. Since Christmas however, the prepay market has stabilised and now the market is set to return to growth in September when new handset launches drive the market up.

How Has the Major Domestic Appliances Sector Performed?



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

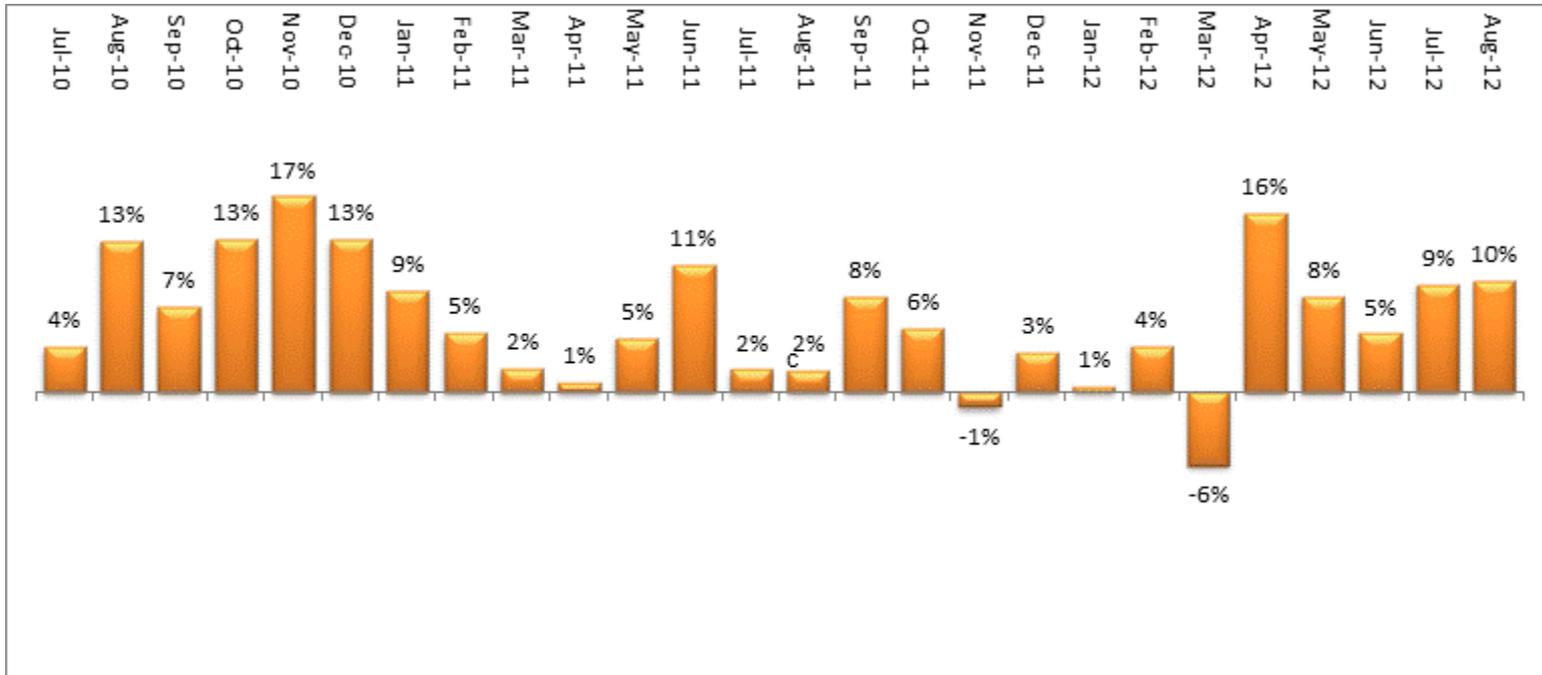


Washing machines clean up in the race for most value growth, up 17% compared to August last year. Whilst freezers decline slightly (down -2%) cooking appliances help drive positive performance for the sector, growing 7%.

How Has the Small Domestic Appliances Sector Performed?



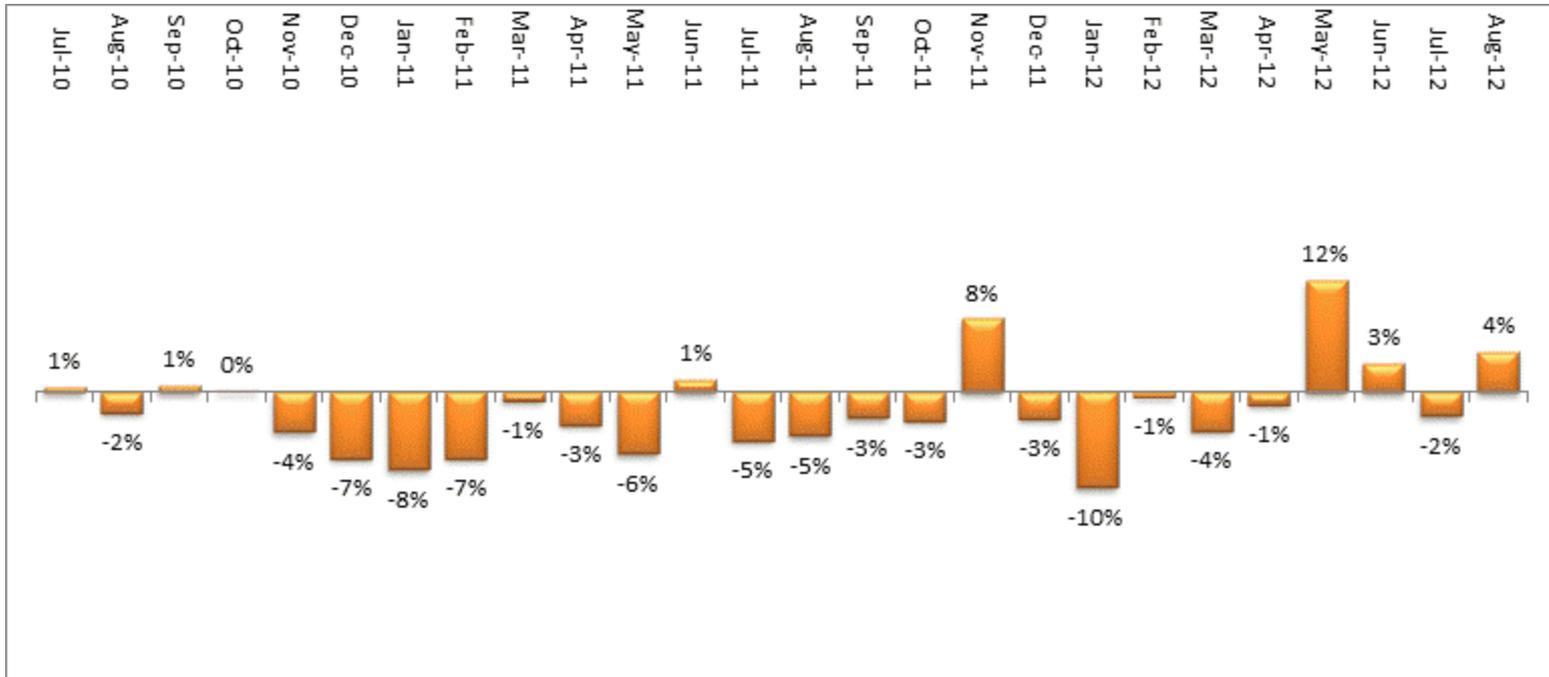
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Vacuum cleaners drive most value growth in the small domestic appliances sector in August, up 23% month on month. In the kitchen, food preparation devices perform well, growing 8% on August last year.

How Has the Office Sector Performed?

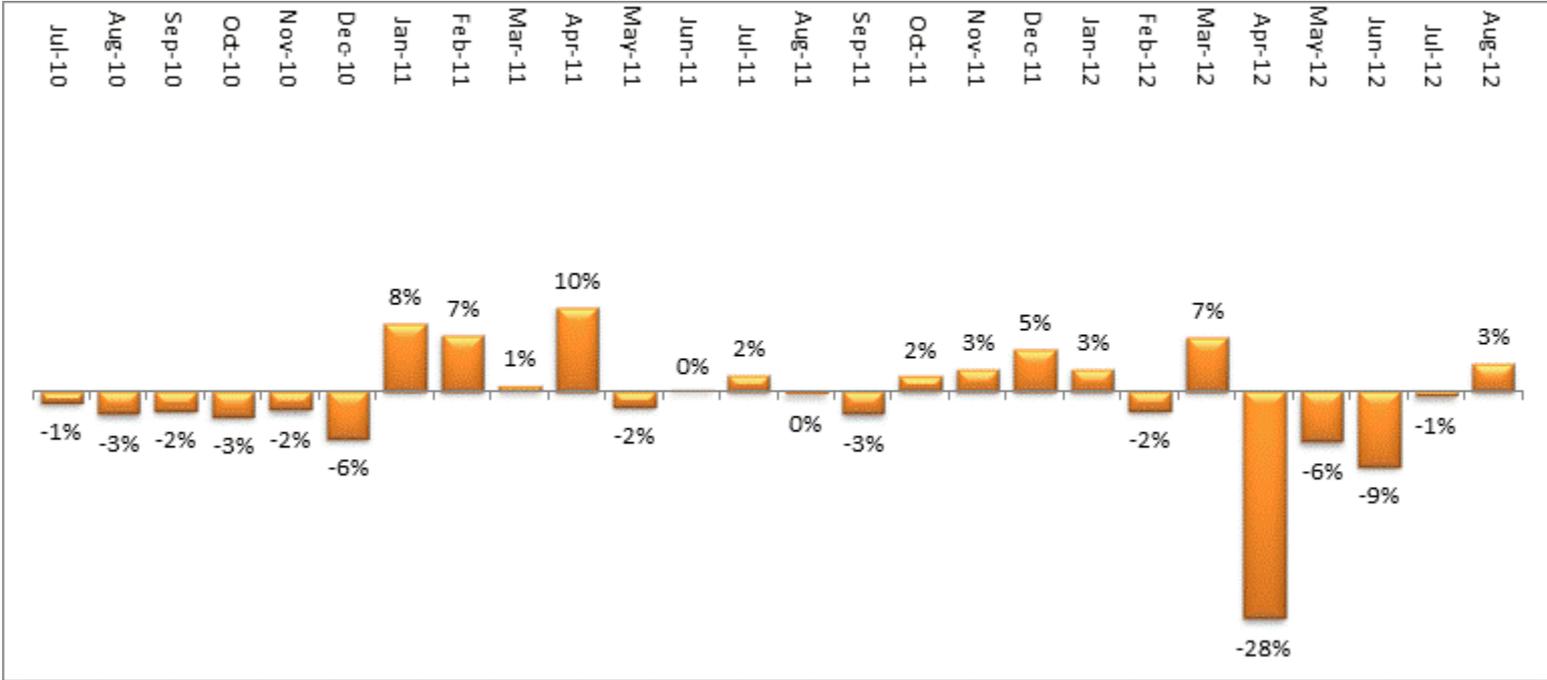
Month on Month % Growth in Sector Value
(this month versus the same month last year)



There has been modest growth in the office sector owing to significant growth in the stationery segment. Pencil cases and office adhesives have returned to August 2010 levels after a disappointing 2011, however ball point pens is the main driver, up 35% month on month and exceeding 2010 figures. Other categories, such as laser and inkjet cartridges, continued to struggle due to a declining average selling price linked to the slowdown in the printer hardware market.

How Has the DIY/Gardening Sector Performed?

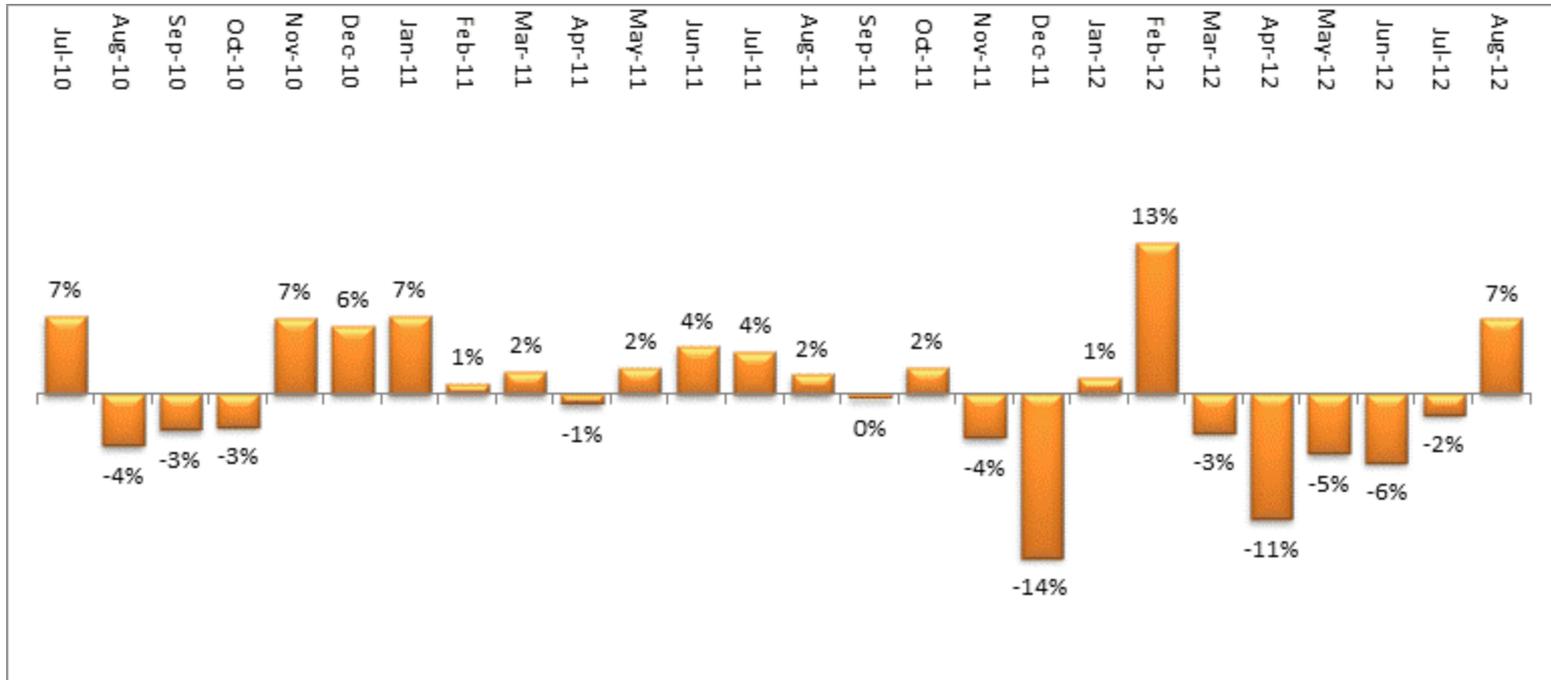
Month on Month % Growth in Sector Value
(this month versus the same month last year)



An improvement in sales of outdoor categories such as wood care, lawnmowers and garden chemicals have contributed to the growth in the DIY/gardening sector in August.

How Has the Automotive Sector Performed?

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



Strong performance in the engine oils and paint care product categories contributed to an impressive 7% growth in value for the automotive sector compared to August last year.

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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
Electronic Assistants
Laminating Accessories
Calculators
Laminating Systems
Lettering Machinery
Office Adhesives
Repositionable Notes
Shredders
Office Adhesive Tapes
Ballpoint Pens
Print Cartridges
Coated Paper
Colour Felpens
Colouring Pencils
Compasses
Office Paper
Pencil Cases

Small Domestic Appliances

Blood Pressure Monitors
Bread Makers
Digital Thermometers
Food Steamers
Fun Cooking
Mini Ovens
Air Conditioners
Air Treatment
Bakeware
Can Openers
Juice Extractors
Coffee Grinders
Hot Beverage Makers
Deep Fryers
Dental Care Products
Electric Blankets
Electric Heating
Electric Knives

Correction Products
Crayons
Fountain Pens
Graphite Pencils
Highlighters
Lever Arch Files
Markers
Mechanical Pencils
OHP Pens
Perforators
Rollerballs
Staplers
Suspension Filing Systems
Writing Felpens
Office Non-Tracked Products
Scissors
Stationery Accessories

Electric Beauty
Food Preparation
Hair Dryers
Hair Styling
Hair Clippers
Ice Cream Makers
Irons
Kettles
Pans
Personal Scales
Pots
Pressure Cookers
Rice Cookers
Sandwich Toasters
Shavers
Toasters
Steam Cleaners
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

Telecommunications

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

Consumer Electronics

CD Recording Media
Video Tapes
DVD Recording Media
CRT Televisions
TV Recorders
Video Recorders
Portable Televisions
Panel Televisions
Set Top Boxes
DVD Players/Recorders
Digital TV Accessories
Battery Chargers
Dry Batteries
USB Memory
Camcorders
MD Players/Recorders
Turntables
Loudspeakers
CD Players/Recorders
Audio Home Systems

Amplifiers
Receivers
Tuners
Radio Recorders
Portable Radios
Clock Radios
Dictation Systems
Headphones
Headphone Stereors
Universal Remote Controls
Digital Portable Audio Players
Digital Portable Video Players
Car Audio
Car Speakers
Car Navigation
Car Vision
Videogames Consoles
Camcorder Powerpacks
Torches
MP3 Accessories

Photo

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