



GfK Market-i

An Insight into August 2014 UK Retail Durable Sectors

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A Look at the Month



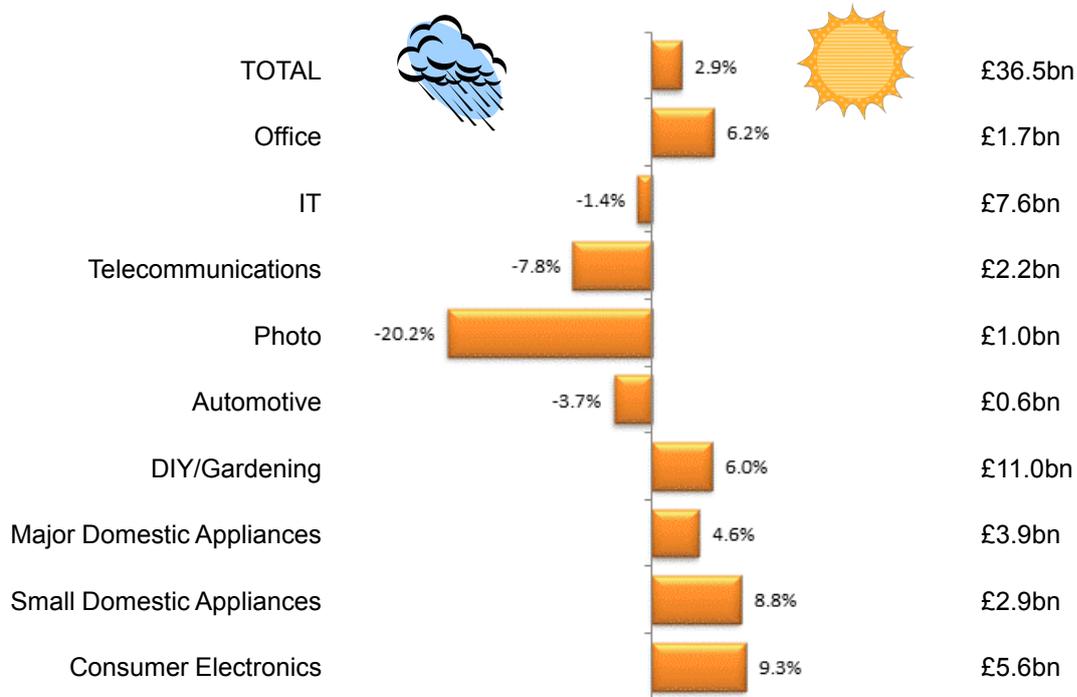
- The total durables market continues to grow, up month on month for the tenth consecutive period. August 2014 saw total market value grow 3.6% compared to the same month last year.
- The consumer electronics sector was the strongest performer in August 2014, up 15% as key product categories remain refreshed thanks to recent innovations and launches.
- Whilst the DIY/gardening sector began to fade, attention was focused on the back to school season and helped drive growth in the office sector where value finished 11% up on August last year.
- The online distribution channel remains key for retailers, with value share representing 18% of the total durables market (up from 14% in August 2012 and 17% in August 2013).

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
Sep13-Aug14

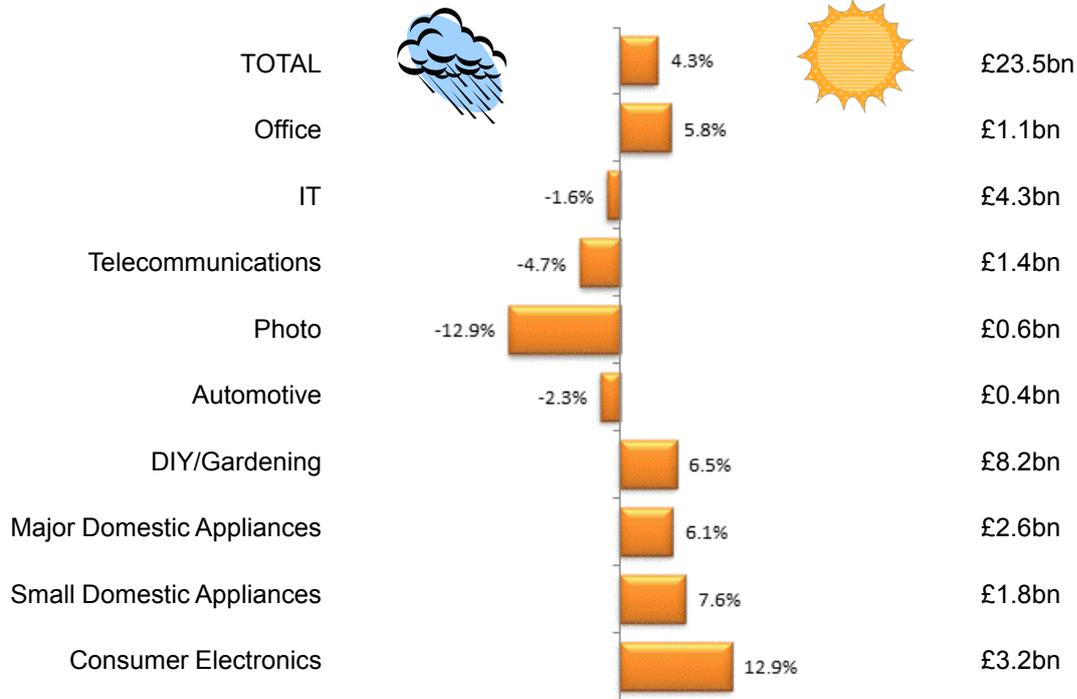


Which Sectors Have Driven the Market Year to Date?



Year to Date % Growth in Value
(value so far this year versus the same period last year)

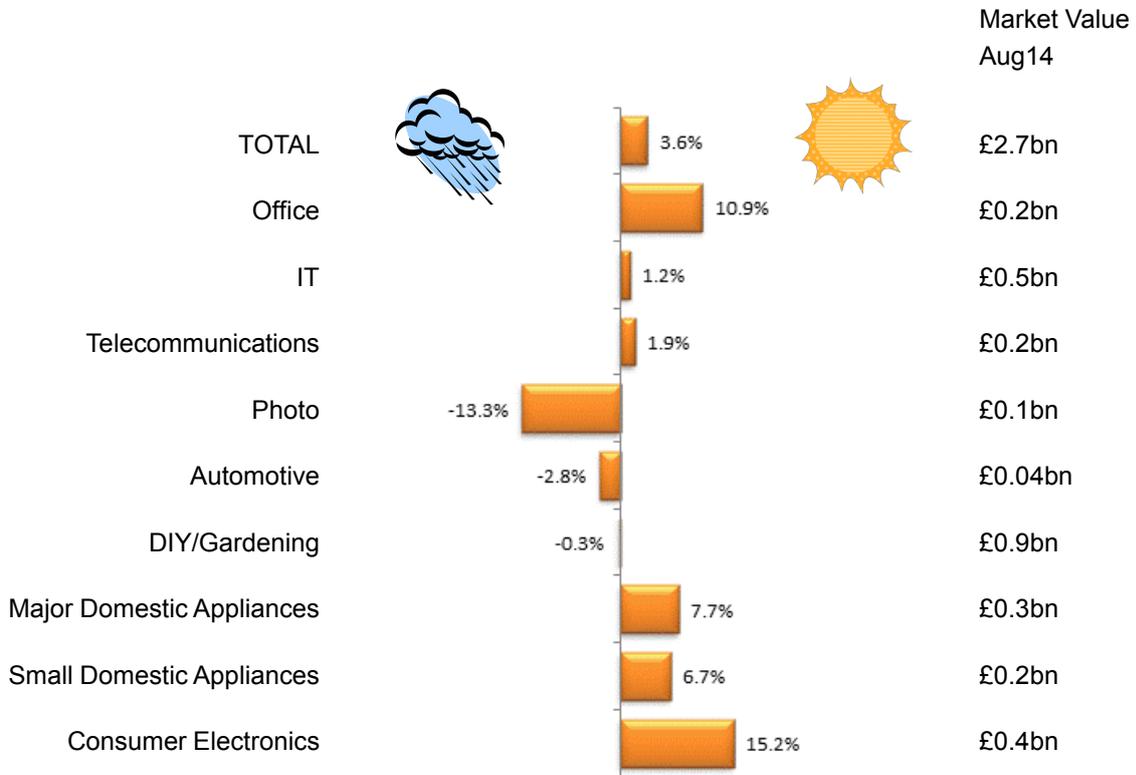
Market Value
Jan14-Aug14



Which Sectors Have Driven the Market Month on Month?



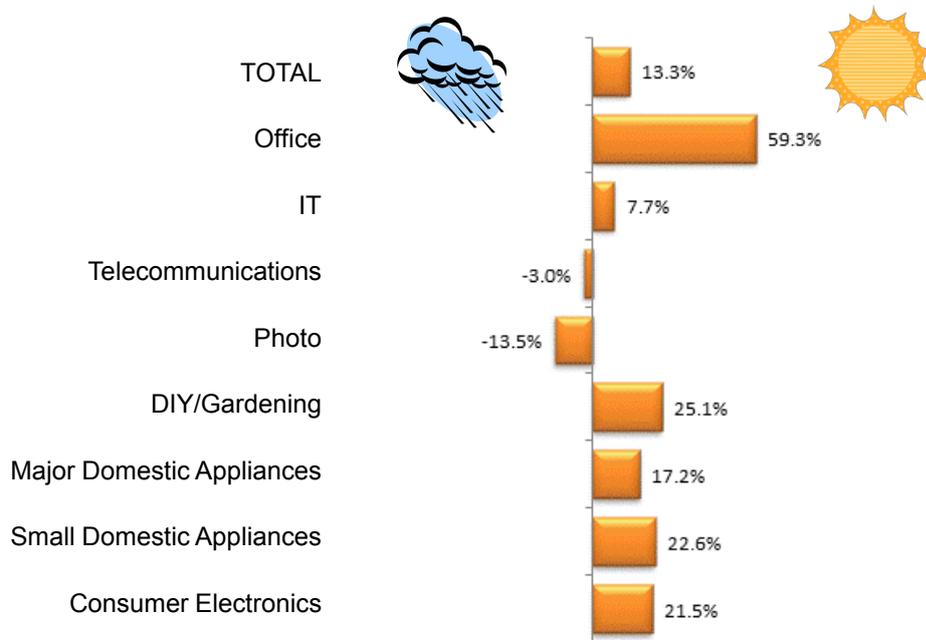
Month on Month % Growth in Value
(this month versus the same month last year)



How are Online Sales Performing Month on Month?



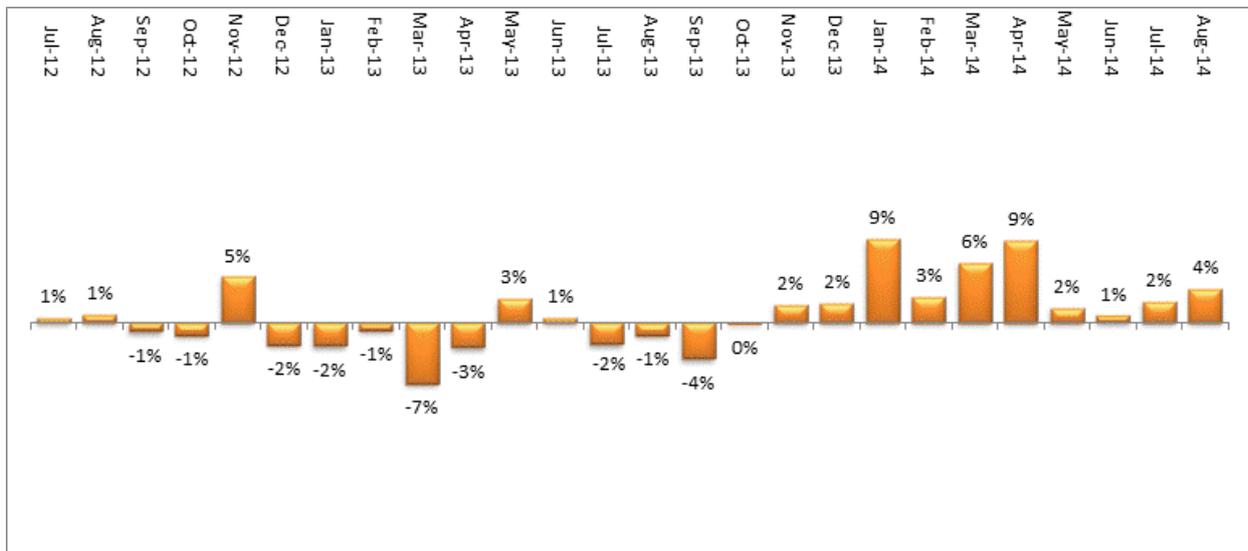
Month on Month % Growth in Online Sales
(this month versus the same month last year)



How Has the Total Durables Market Performed?



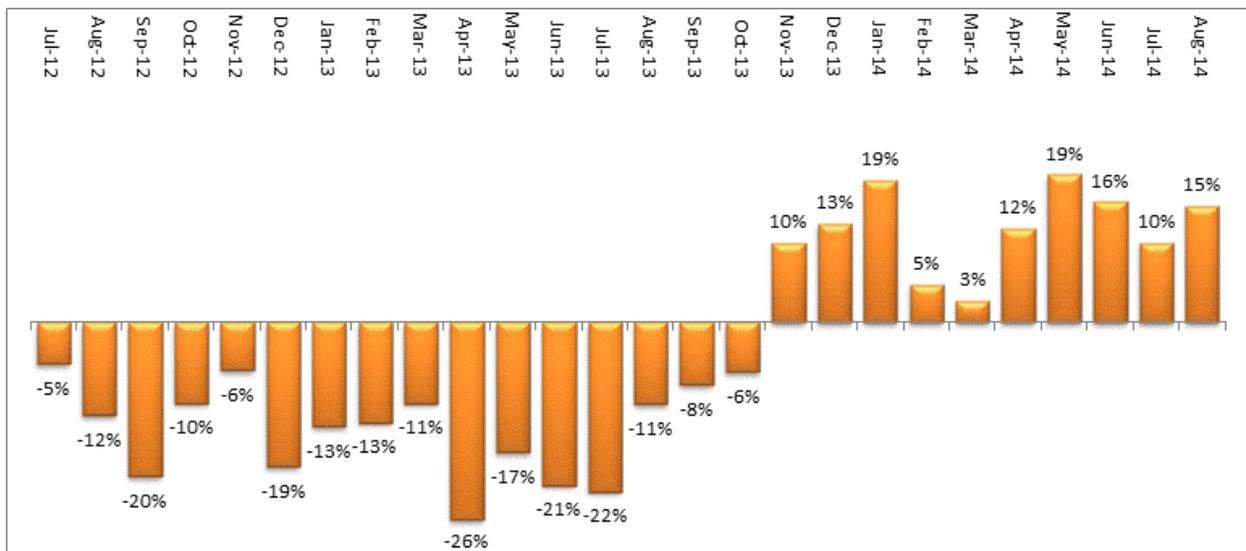
Month on Month % Growth in Total Market Value
(this month versus the same month last year)



How Has the Consumer Electronics Sector Performed?



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

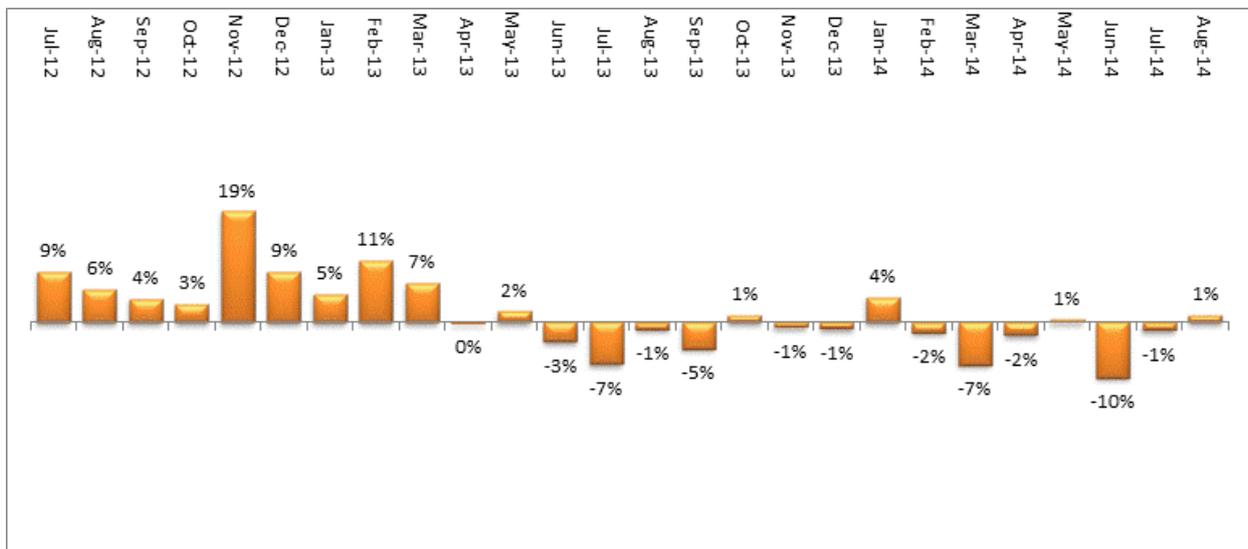


Games Consoles are still contributing to grow in the consumer electronics sector almost a year after some key launches so could continue for a few months yet, but within traditional product categories we still have positive performances from the largest TV screen sizes, sound bars, headphones and car navigation.

How Has the IT Sector Performed?



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

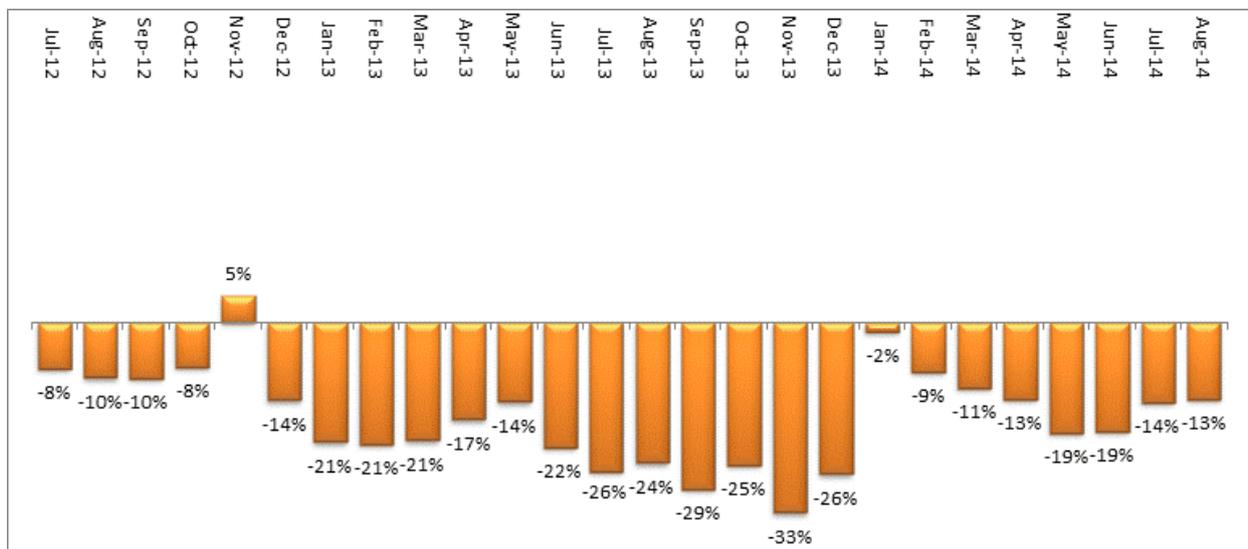


The IT sector saw strong growth in laptops in August, reversing a trend of long term decline. This, in conjunction with growth in the peripherals areas and desktop computing, was enough to overcome the 20% value decline in the tablets market.

How Has the Photo Sector Performed?



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

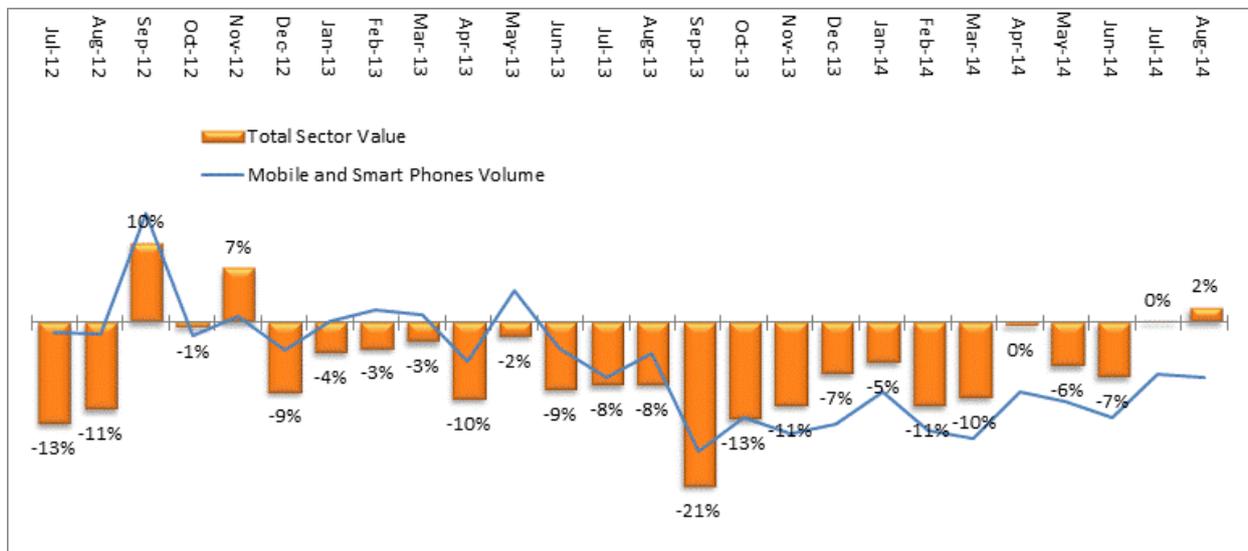


The photo sector continues to struggle compared to last year. As usual, higher end products are outperforming the market whilst middle range products are the category suffering the most. Hopefully we will see some positive impacts from Photokina and the new launches at the end of the year.

How Has the Telecommunications Sector Performed?



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

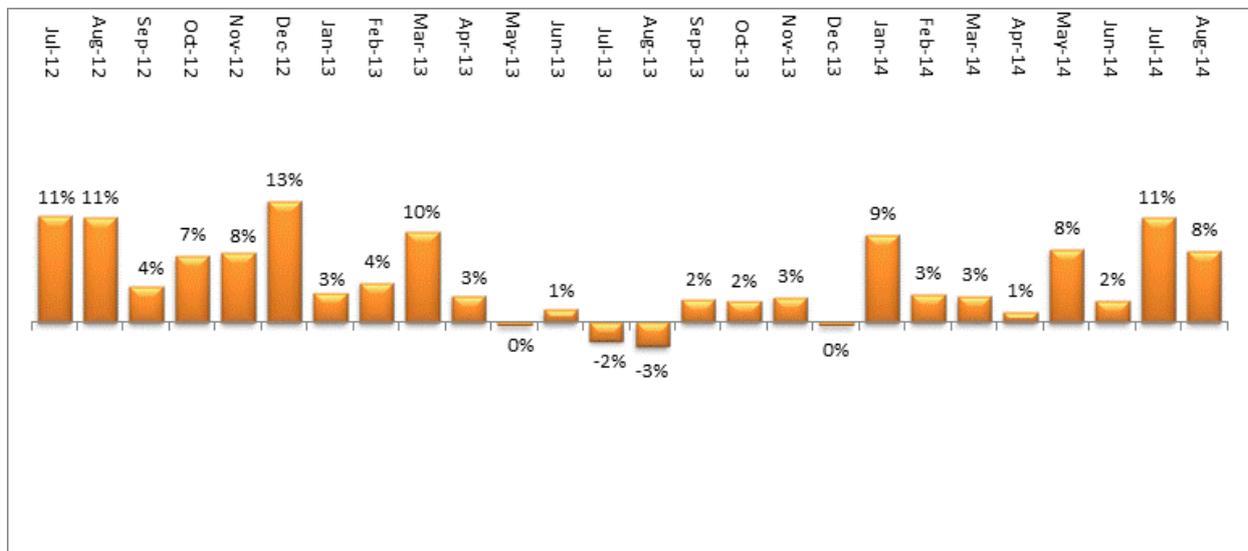


Despite volume remaining negative month on month, August enjoys a modest uplift in value compared to the same month last year, driven in part by mobile enhancements which grow 11%.

How Has the Major Domestic Appliances Sector Performed?



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

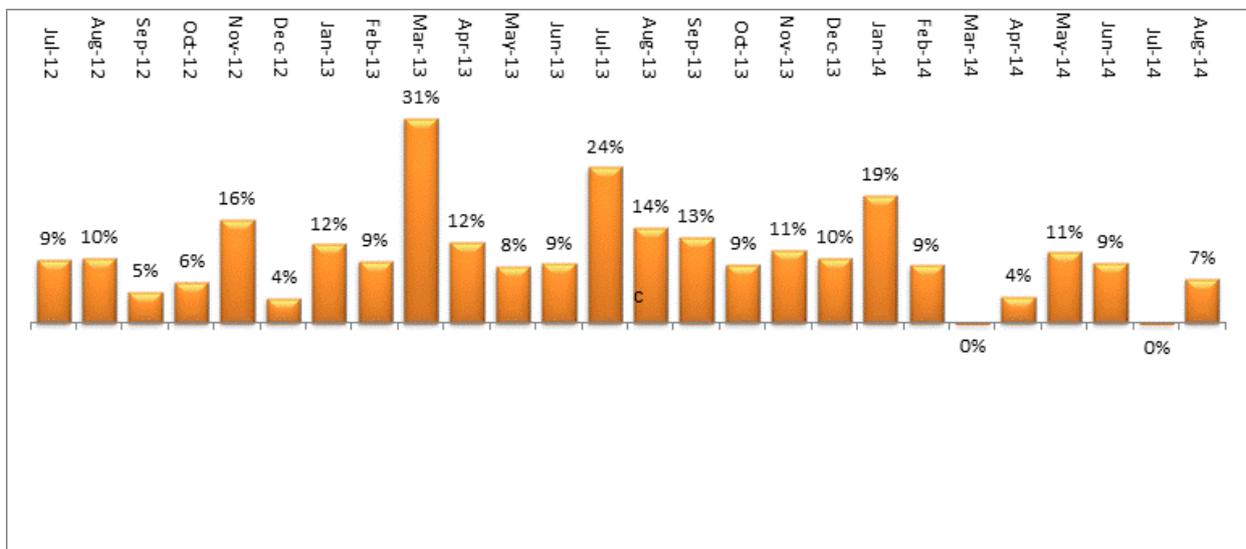


Despite not quite matching up to its performance in July, major domestic appliances nevertheless saw strong growth against the previous year in a number of areas during August. Tumble dryers rose at 31%, whilst cooling and built in cooking continued to grow well at 9% and 15% respectively.

How Has the Small Domestic Appliances Sector Performed?



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

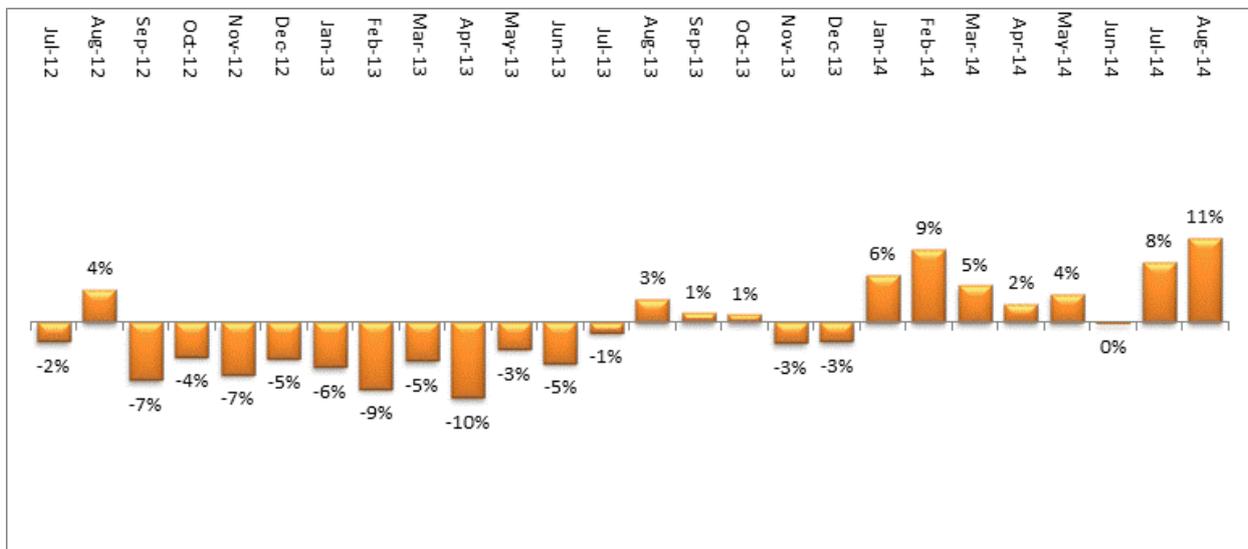


Air treatment and electric heating were the key winners in August, value rising at 52% and 49% respectively. Double digit growth within vacuum cleaners and shavers also helped propel the small domestic appliances market back into positive territory after disappointing figures in July.

How Has the Office Sector Performed?



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

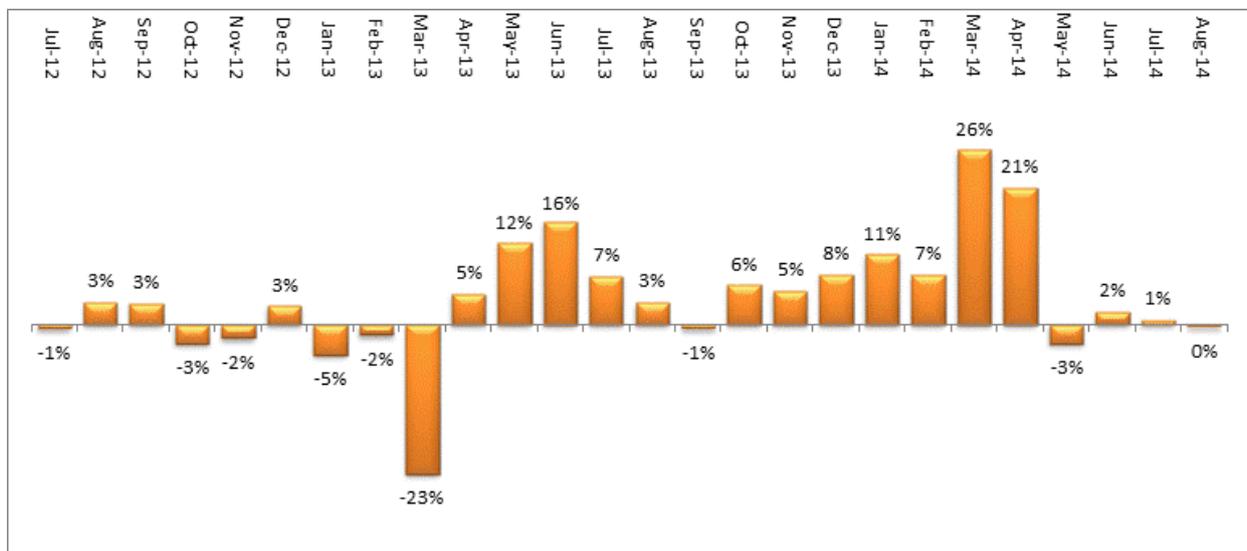


With the back to school season in full swing, several of the stationery categories enjoy a boost. In particular, fountain pens and graphite pencils grow 13% and 10% respectively compared to August last year.

How Has the DIY/Gardening Sector Performed?



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

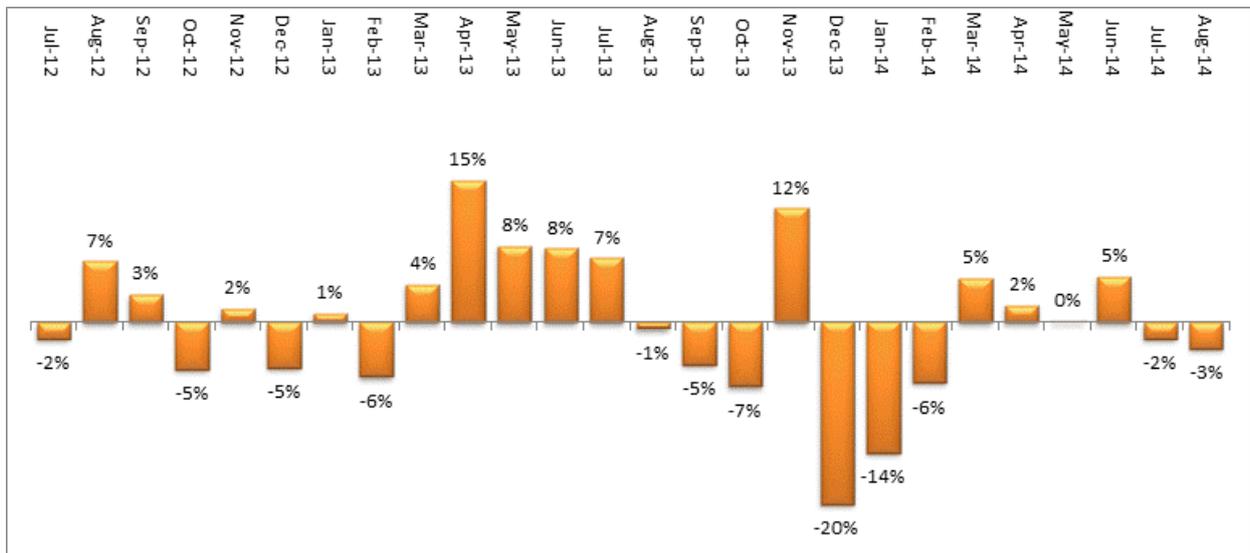


There were mixed results in the DIY/gardening sector, resulting in an overall flat month on month comparison. Growing media and fertilisers both fell 12% compared to August last year, whilst good performance in power tools and accessories were helpful in offsetting these declines.

How Has the Automotive Sector Performed?



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



Increased average engine oil prices resulted in a value decline far lower than the double digit volume decline.

For Further Insight and Enquiries:

Natasha Fernando | natasha.fernando@gfk.com | 020 7890 9473

© GfK 2014 | Market-I (Tracks performance at sector level for total retail market – see pages 31-32 for sector definition)

Useful Information

Distribution Channels Tracked

Product Categories Tracked

Distribution Channels Tracked in the UK



Accurately tracking a universe of 67,000 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
- Pure Players
- Telecommunications Specialists
- Supermarkets
- Variety Chains
- Mail Order Houses
- Department Stores
- Book Stores
- 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
Carburettor Cleaners
Car De-Icer
Chrome/Aluminium Cleaners
Contact Spray/Rust Releasers
Engine Cleaners/Degreasers
Engine Oils
Engine and Petrol Additives
Exhaust Repair/Maintenance
General Cleaners
Glass Cleaners/Rain Repellents
Paint Care Products
Plastic/Synthetic Cleaners
Screen Wash
Technical Lubricants
Temporary Tyre Repair
Tyre Cleaners
Upholstery Cleaners
Wheel Cleaners

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
Laminating Accessories
Calculators
Laminating Systems
Lettering Machinery
Office Adhesives
Repositionable Notes
Shredders
Office Adhesive Tapes
Ballpoint Pens
Laser Cartridges
Inkjet Cartridges
Coated Paper
Colour Feltpens
Colouring Pencils
Compasses

Office Paper
Pencil Cases
Correction Products
Crayons
Fountain Pens
Graphite Pencils
Highlighters
Markers
Mechanical Pencils
OHP Pens
Rollerballs
Staplers
Writing Feltpens
Scissors
Stationery Accessories

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

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

Desktop Computers
Mobile Computers
Media Tablets
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
Gaming and Leisure Devices
Electronic Assistants

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