



GfK Market-i

An Insight into May 2013 UK Retail Durable Sectors

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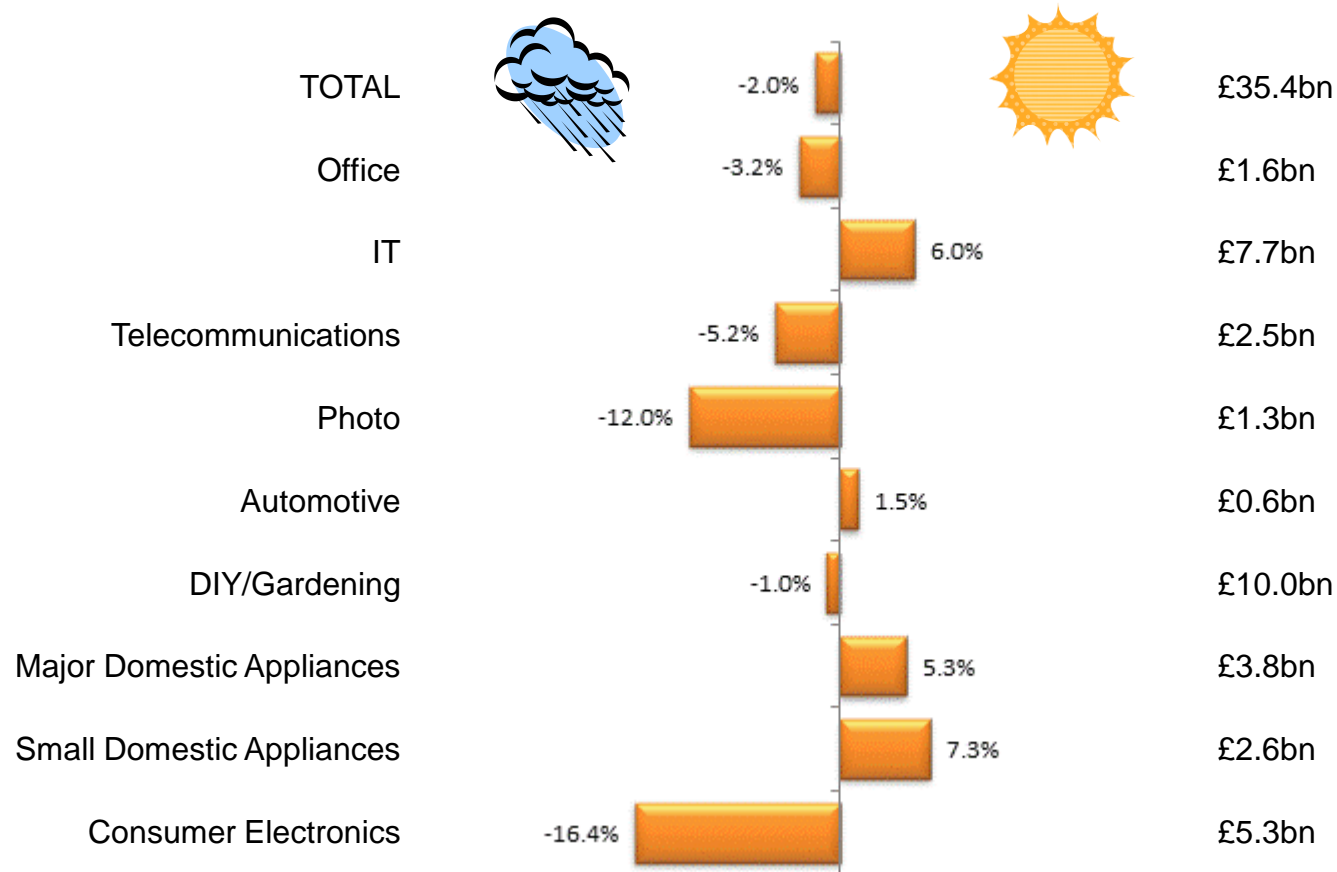
- May 2013 saw the total durables market grow for the first time since November 2012. Total market value grew 2.6% compared to the same month last year.
- The key to growth was the DIY/gardening sector. Month on month growth was 12% - after such a long wait for some warmer weather, there may have been a lot of pent up demand for outdoor products as consumers ventured into the garden.
- In the technology sectors, photo and consumer electronics continued their declines (falling 14% and 17% respectively month on month) whilst the growth in the IT was modest at 1.9% compared to May last year.
- Independent retailers continue to suffer and account for 8% of total market value (compared to 9% at the same time last year).

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)

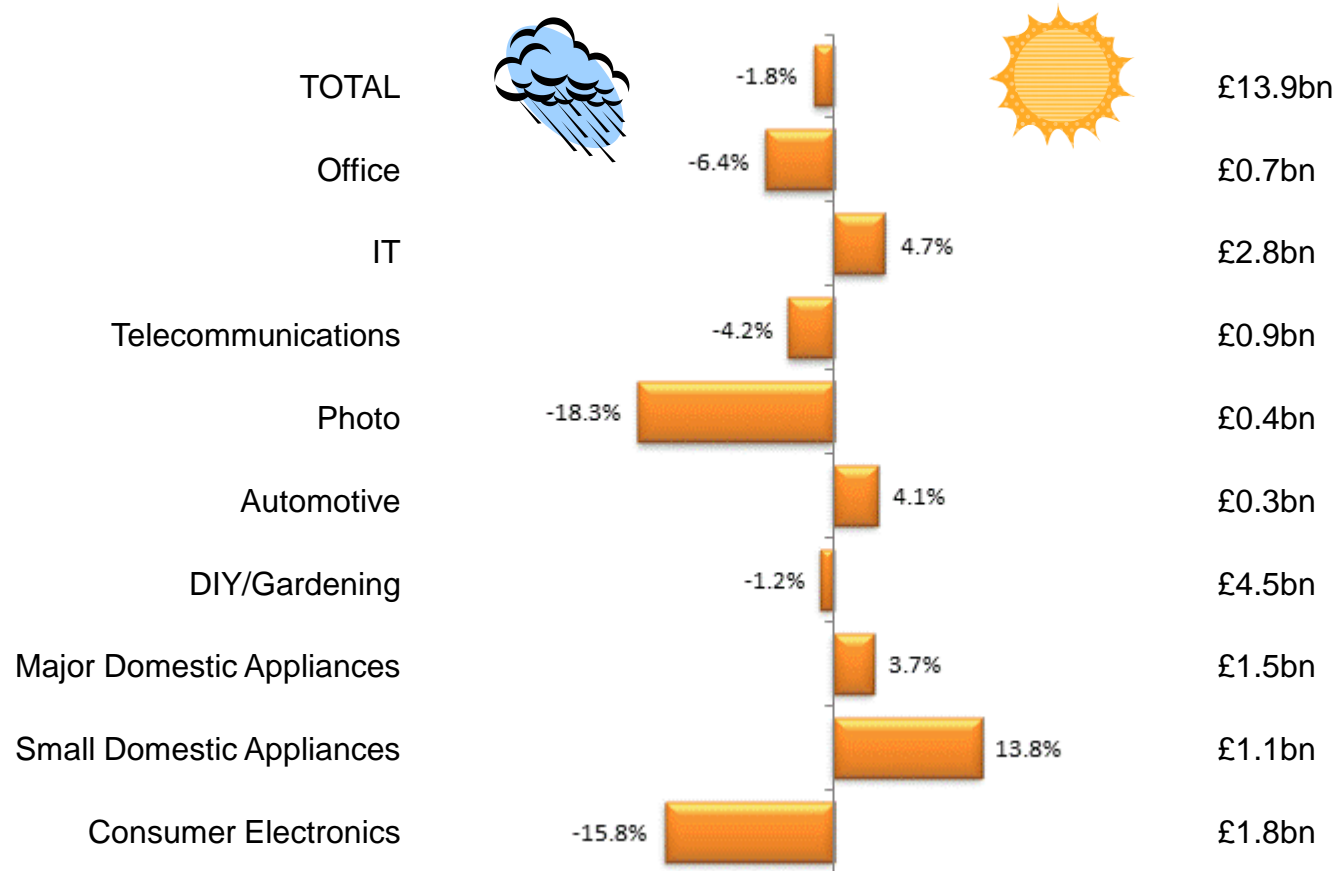
Market Value
Jun12-May13



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
Jan13-May13

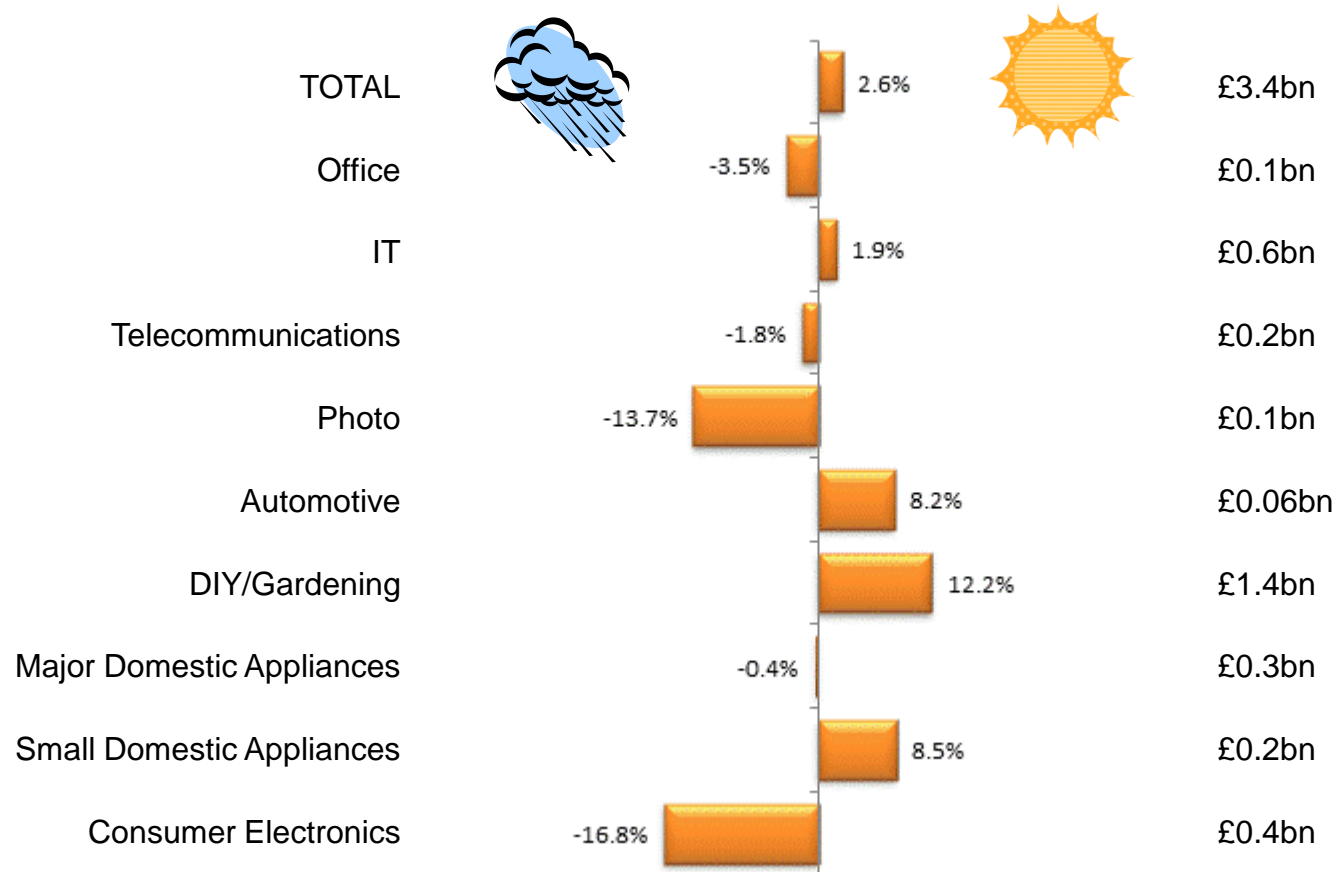


Which Sectors Have Driven the Market Month on Month?



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

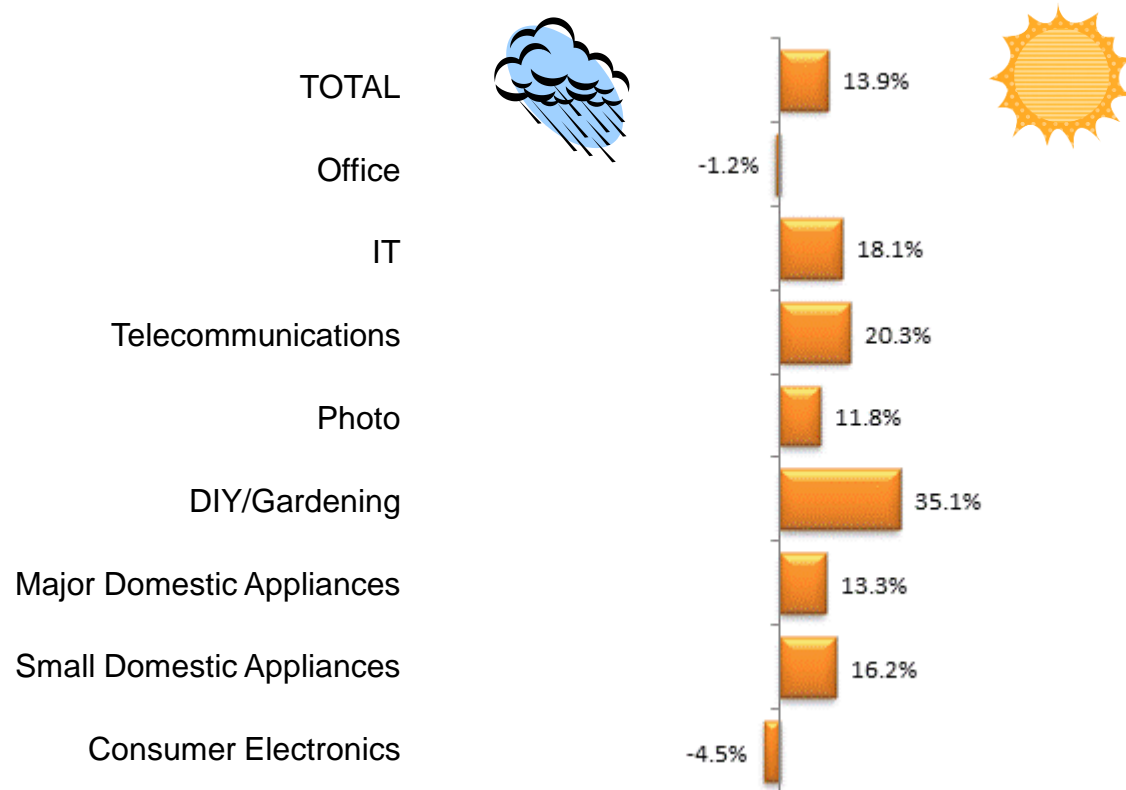
Market Value
May13



How are Online Sales Performing Month on Month?



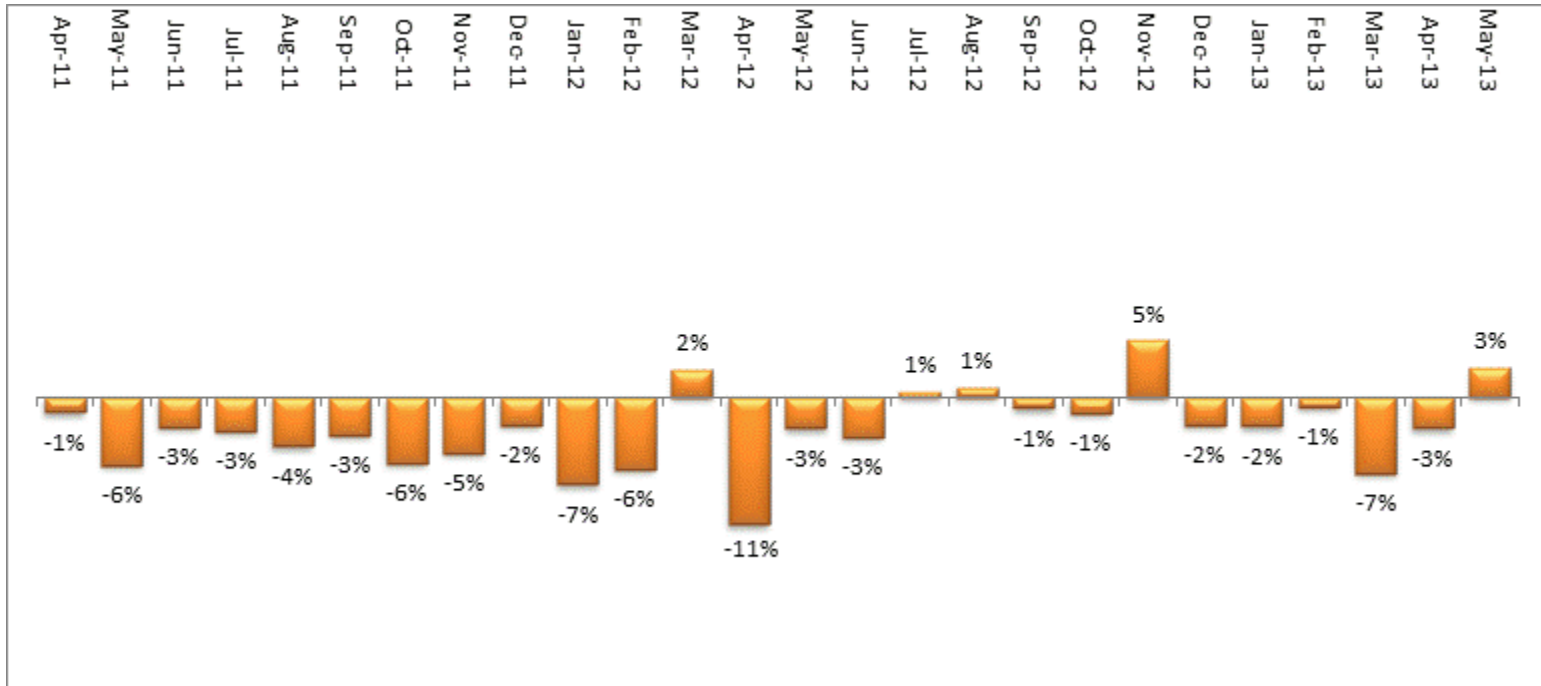
Month on Month % Growth in Online Sales
(this month versus the same month last year)



How Has the Total Durables Market Performed?



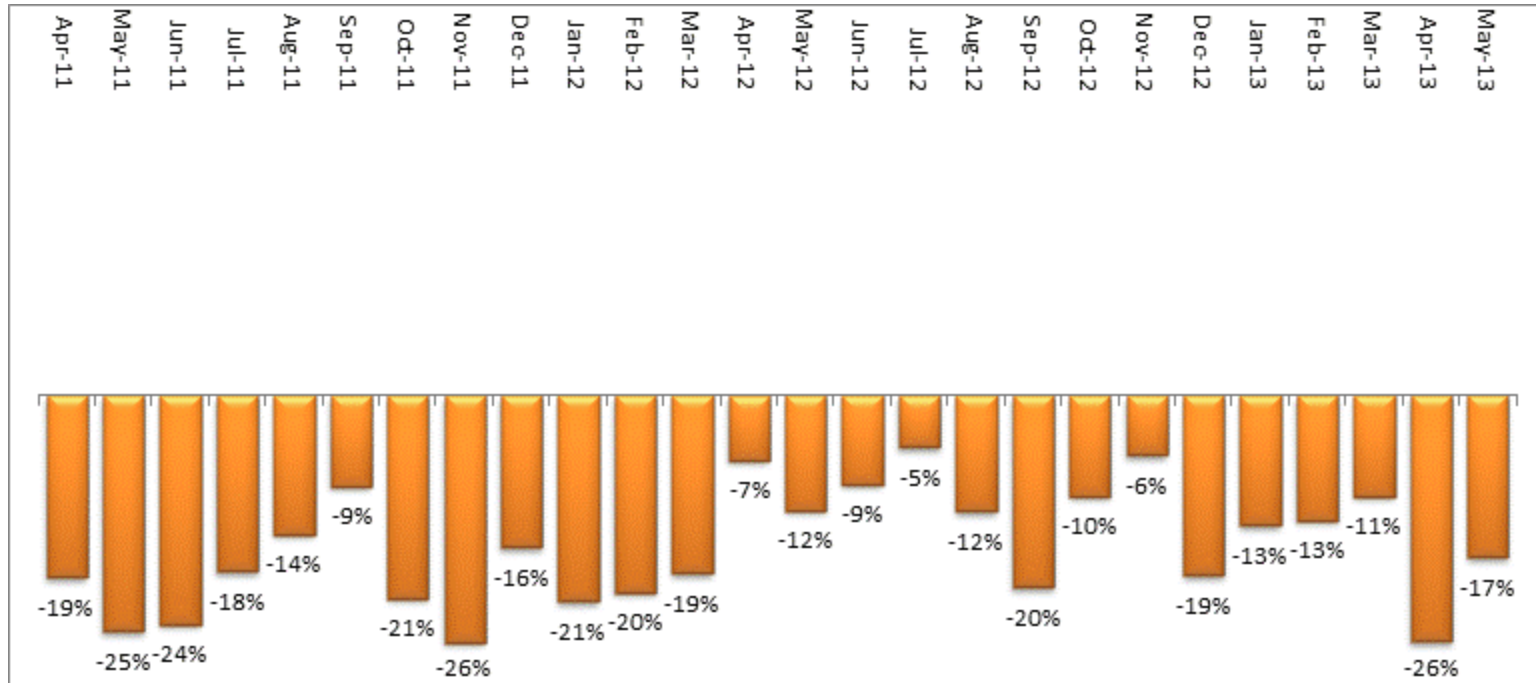
Month on Month % Growth in Total Market Value
(this month versus the same month last year)



How Has the Consumer Electronics Sector Performed?



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

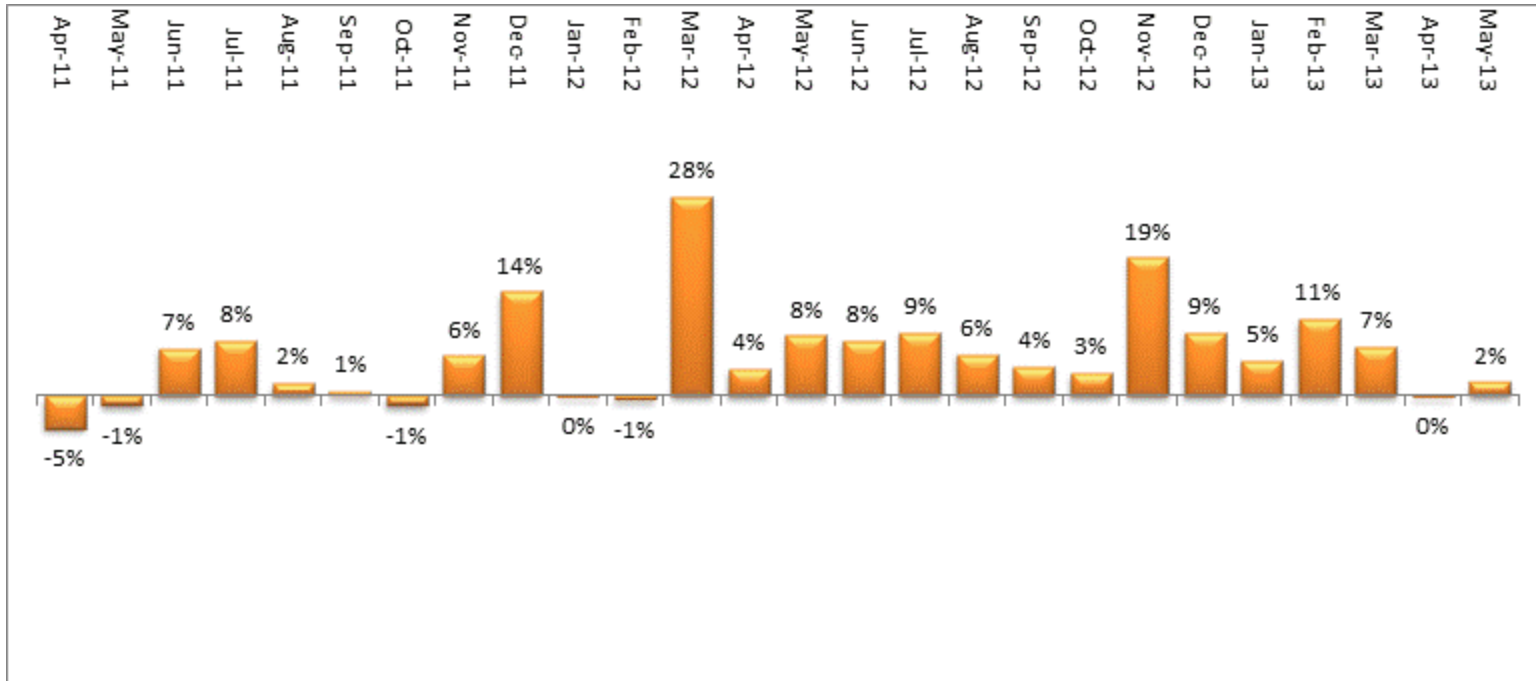


Although the CE market decline was less dramatic in May after April's record equalling shortfall, hopes had been modest at best, as 2013 TV ranges were slow to reach the market (no sporting events to tempt the consumer this year), the inevitable post switchover reduction in set top box sales continued and the only solace came from the consistent growth in sales of sound bars. Although the total audio/hi-fi product portfolio also declined versus May 2012, optimism among connected audio manufacturers and retailers was justified by another good month's sales.

How Has the IT Sector Performed?



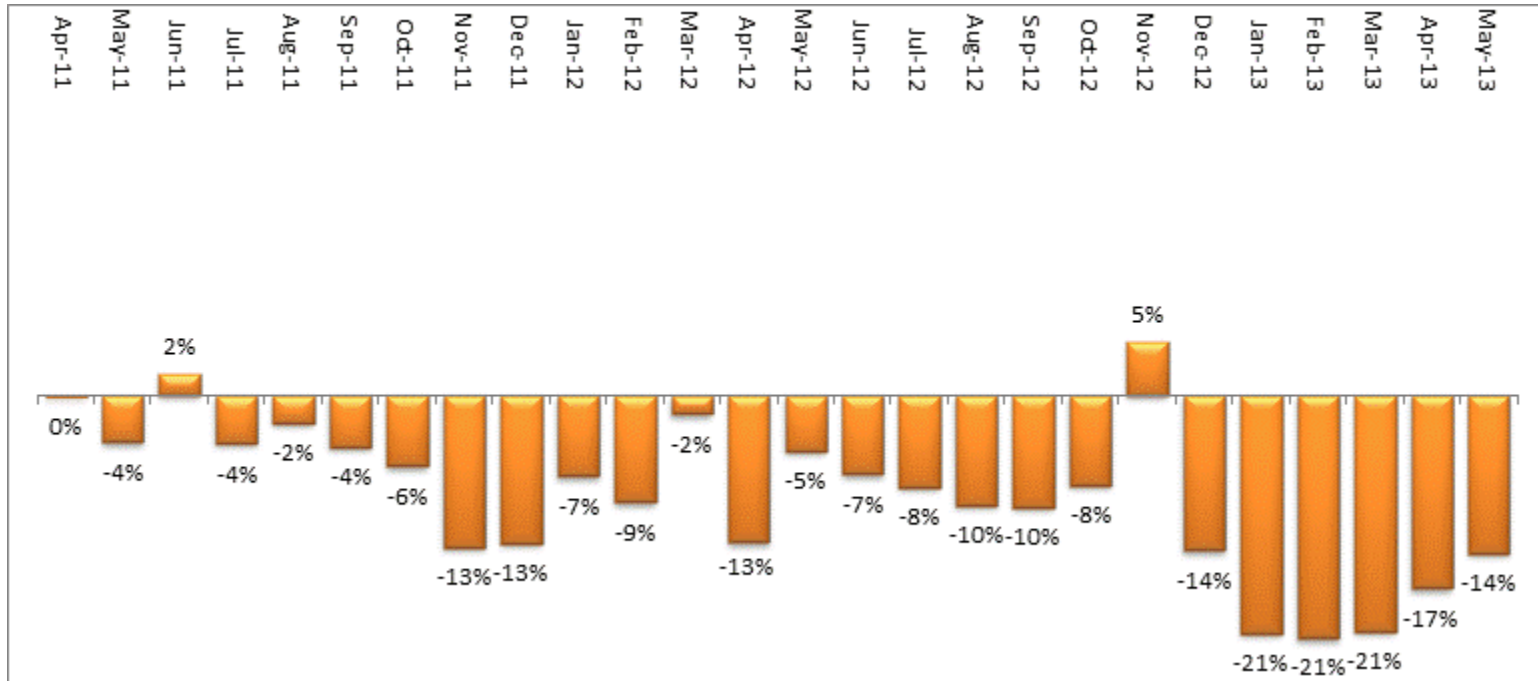
Month on Month % Growth in Sector Value
(this month versus the same month last year)



The IT sector experienced slight growth with media tablets and tablet peripherals such as wireless keyboards responsible for the majority of growth. Communication devices also drove growth in May 2013, with segments such as combi hubs, repeaters, network gateways and port replicators all seeing over double the volume from last May.

How Has the Photo Sector Performed?

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

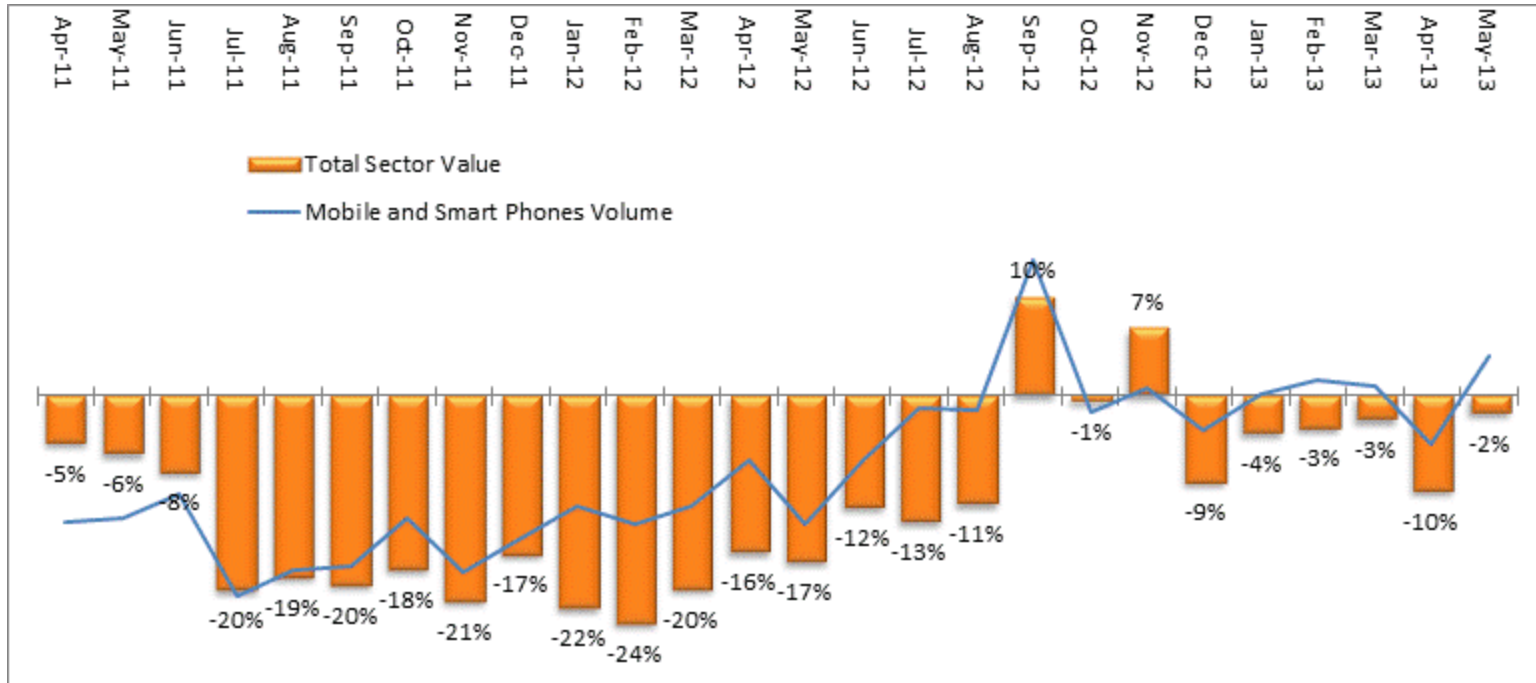


All product categories within the photo sector declined month on month. The biggest fallers in terms of value lost were digital cameras and memory cards which fell 16% and 14% respectively compared to May last year.

How Has the Telecommunications Sector Performed?



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

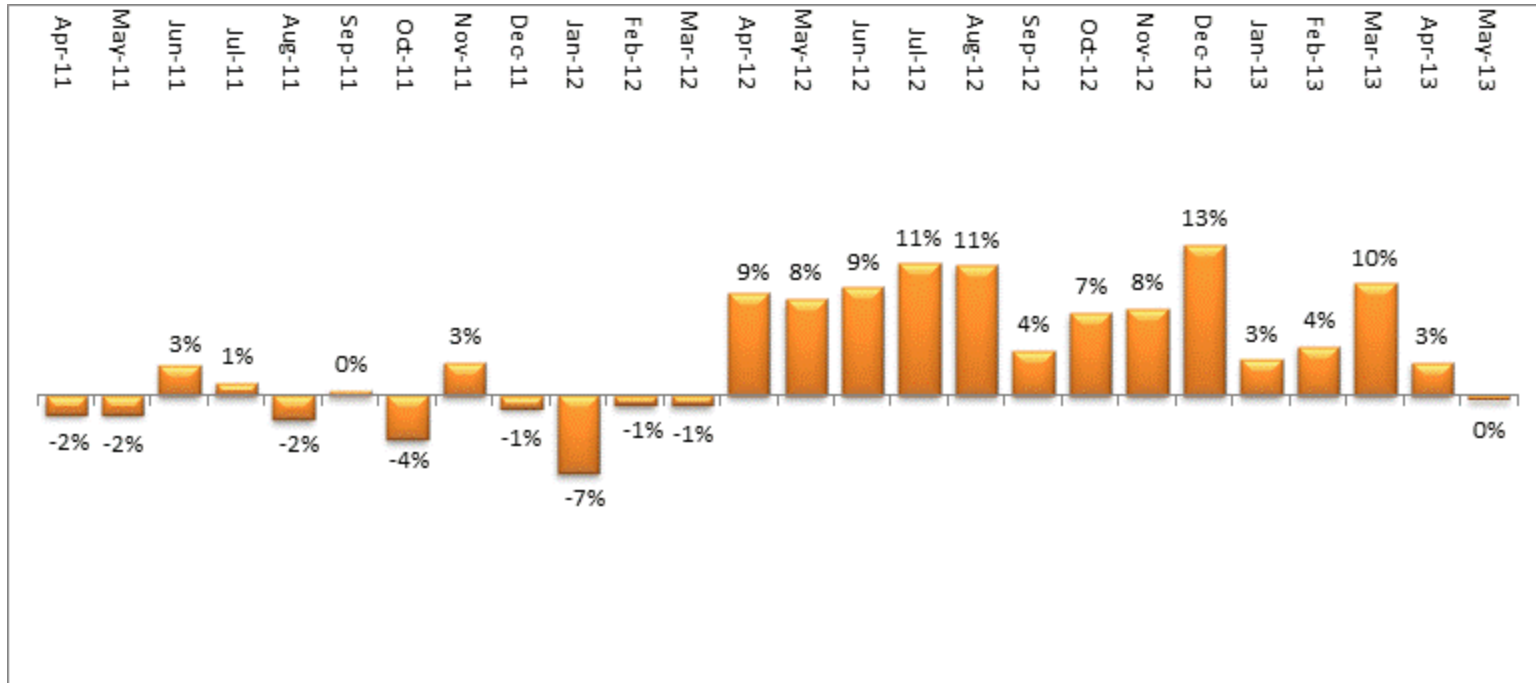


Mobile handsets with a screen size between 3.5 and 5 inches have increased significantly in May 2013 when compared to May 2012 (at which point mobile handsets in this segment took just over 40% of the market).

How Has the Major Domestic Appliances Sector Performed?



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

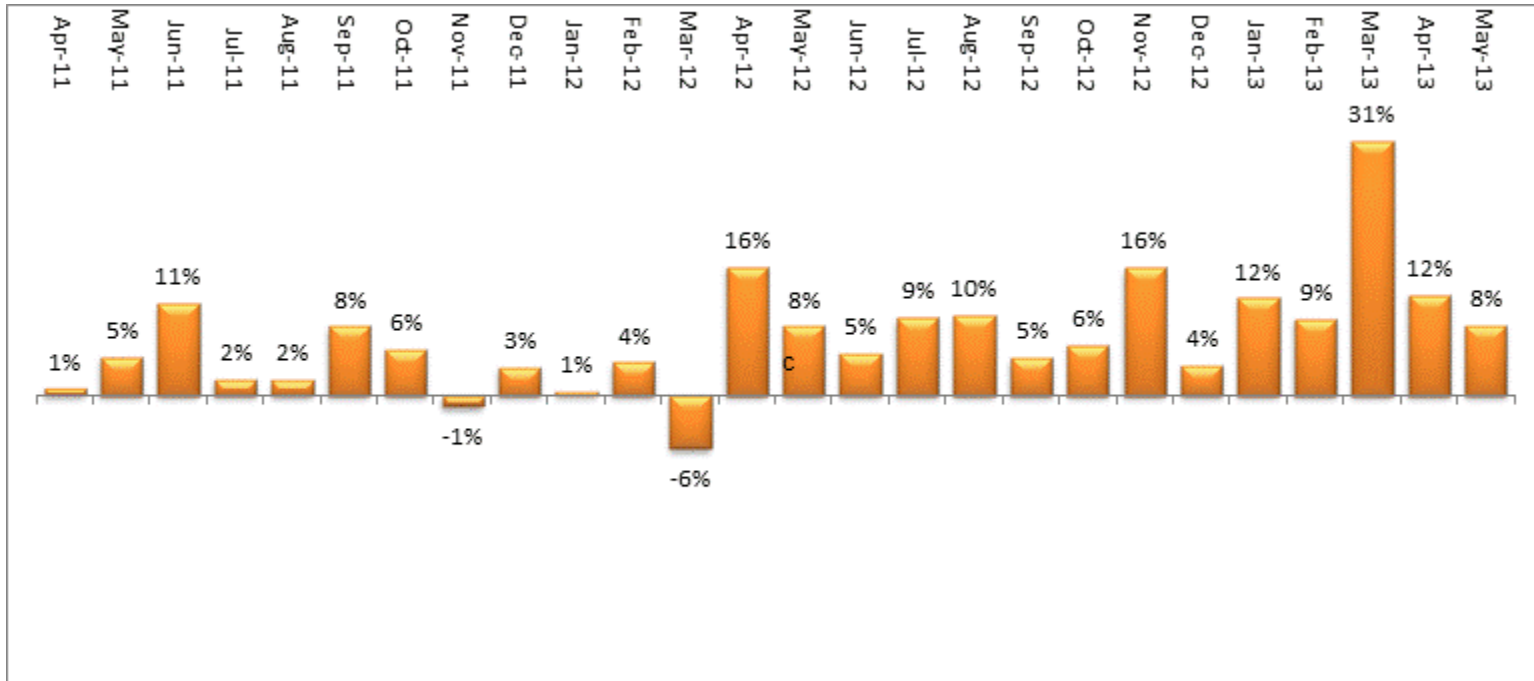


May represents the first signs of weakening value sales for more than a year. Despite a reasonably robust performance from built in appliances, freestanding cooking, washing machines and cooling grew at a much slower rate.

How Has the Small Domestic Appliances Sector Performed?



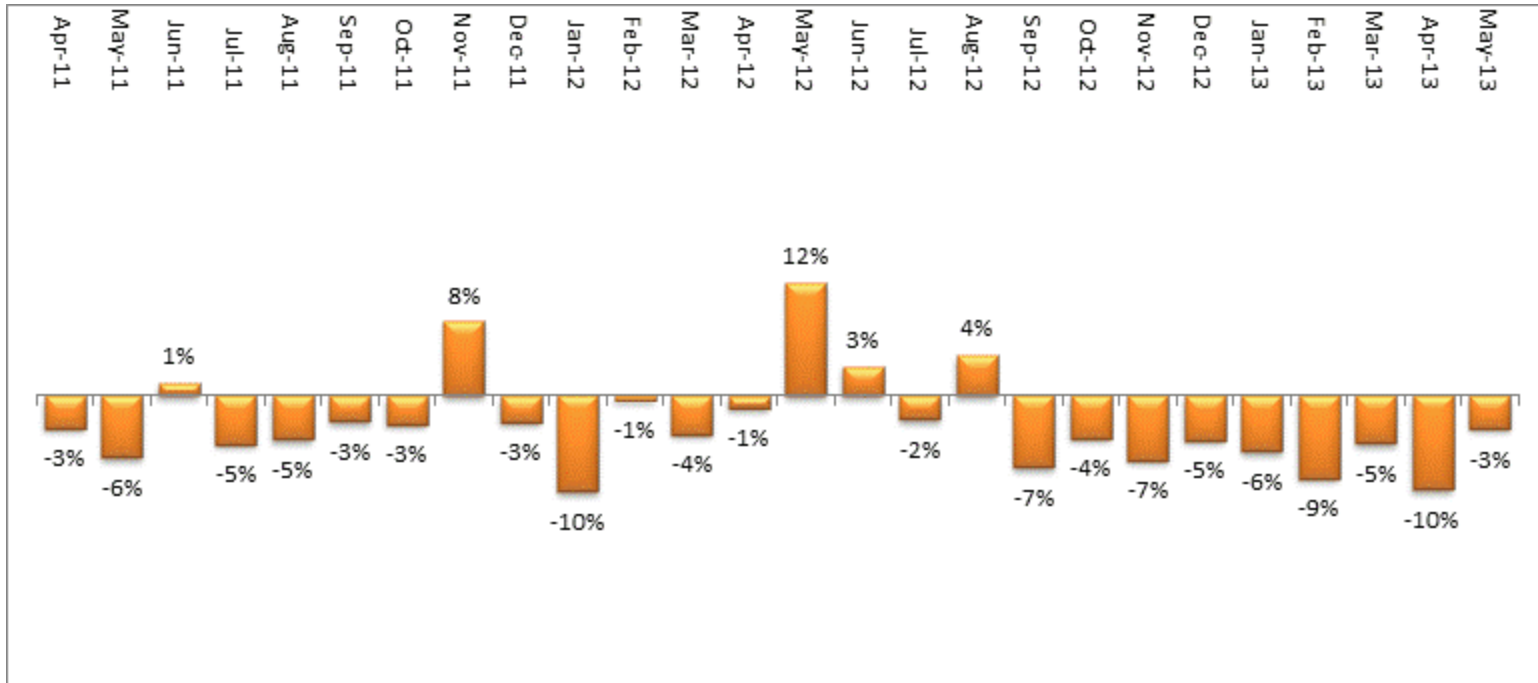
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Vacuum and steam cleaners continue to be among the best performing categories in May closely followed by small kitchen appliances like deep fryers and hot beverage makers. Many of the big categories like toasters, irons and shavers have struggled and this is dragging down levels of value development.

How Has the Office Sector Performed?

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

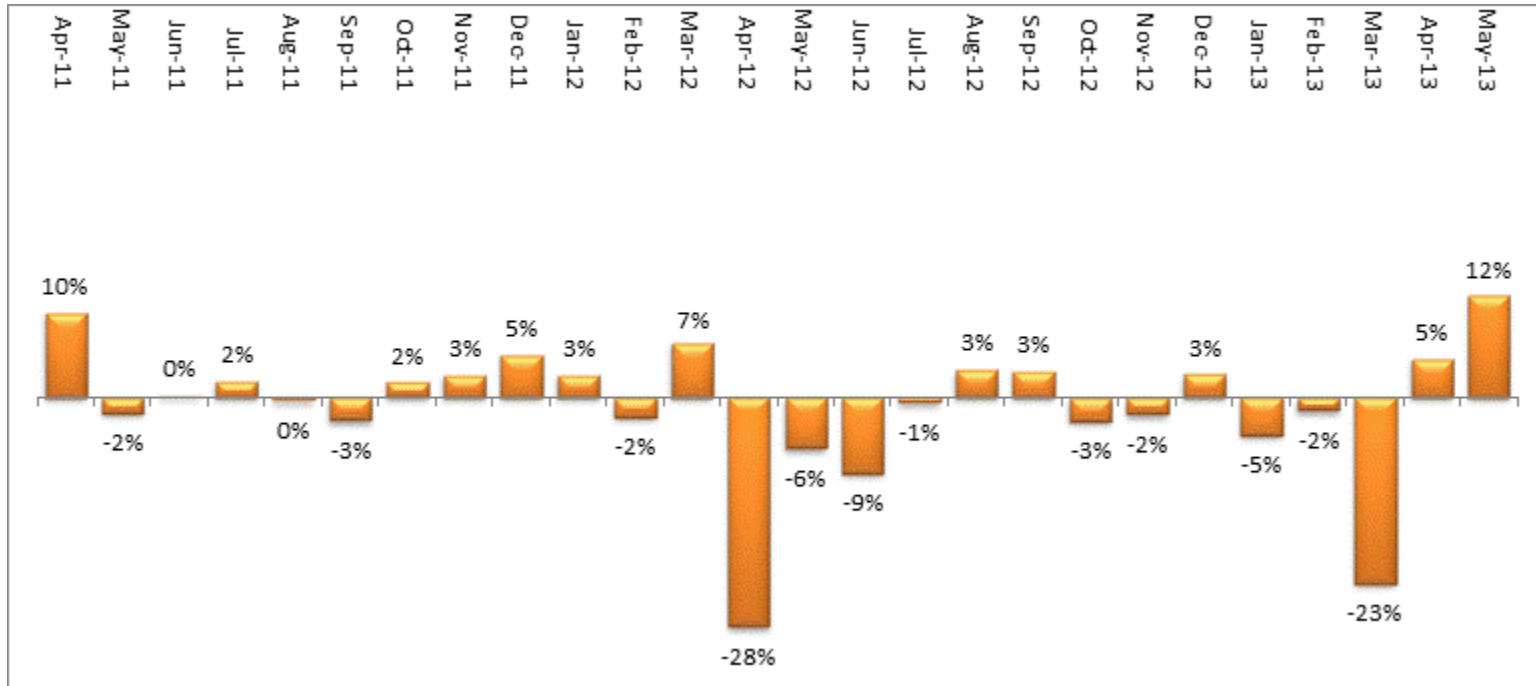


Good growth from many stationery categories including ball point pens, self stick notes and correction products has once again been overshadowed by a continued decline in the large laser cartridge market.

How Has the DIY/Gardening Sector Performed?



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

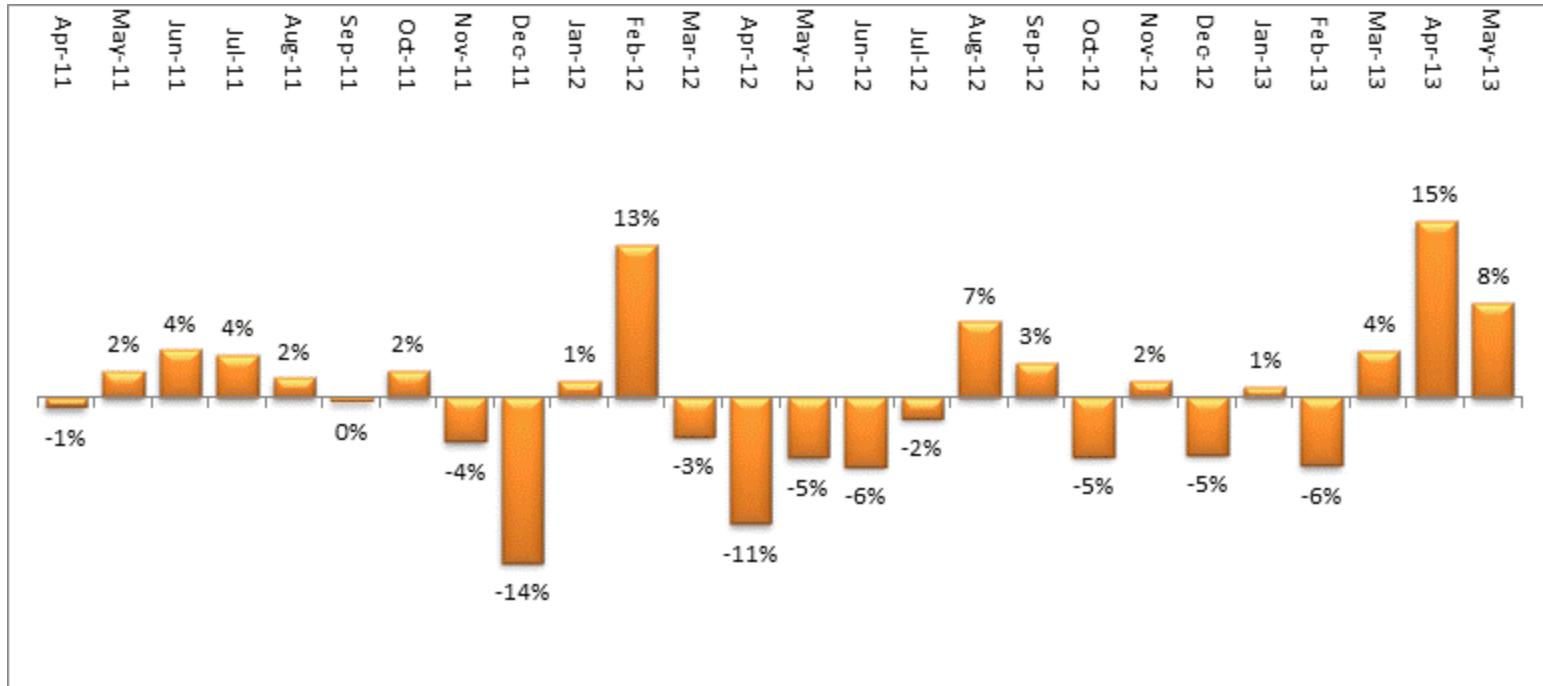


Strong performance over the bank holiday weekends was driven by the improved weather conditions in May and saw growth for many exterior categories buoyed by the likely pent up demand caused by the cold start to the year.

How Has the Automotive Sector Performed?



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



The cleaning segment helps to drive growth in the automotive sector as upholstery cleaner and general cleaners grow 5% and 12% respectively.

For Further Insight and Enquiries:

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© GfK 2013 | Market-I (Tracks performance at sector level for total retail market – see pages 29-30 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
- Supermarket and Cash & Carry Stores
- 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
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
Laminating Accessories
Calculators
Laminating Systems
Lettering Machinery
Office Adhesives
Repositionable Notes
Shredders
Office Adhesive Tapes
Ballpoint Pens
Laser Cartridges
Inkjet Cartridges
Coated Paper
Colour Felpens
Colouring Pencils
Compasses

Office Paper
Pencil Cases
Correction Products
Crayons
Fountain Pens
Graphite Pencils
Highlighters
Markers
Mechanical Pencils
OHP Pens
Rollerballs
Staplers
Writing Felpens
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