



# GfK Market-i

An Insight into November 2013 UK Retail Durable Sectors

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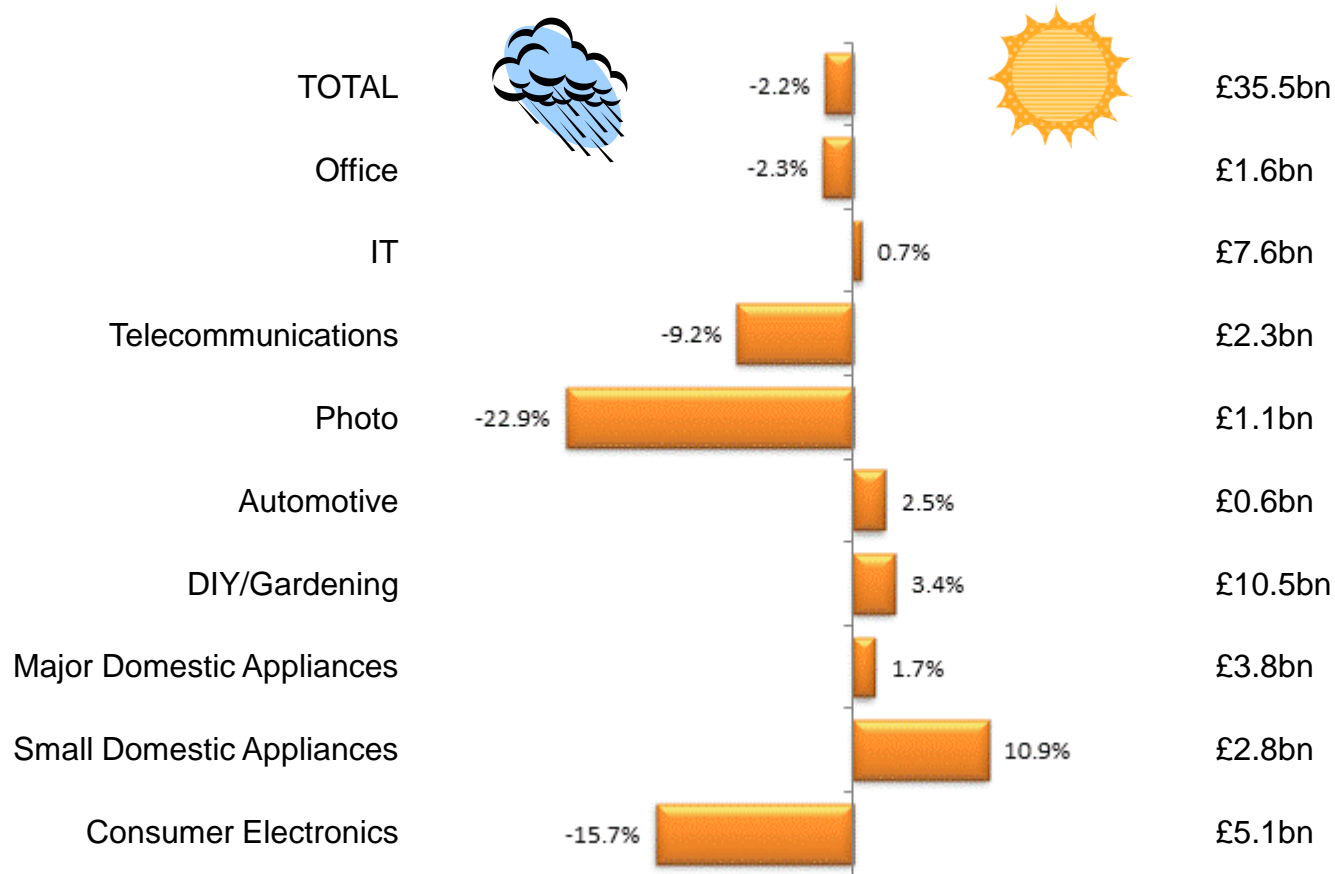
- November 2013 saw the total durables market getting back to positive growth after four consecutive months of decline. Total market value rose by 2%, mainly driven by Small Domestic Appliances, Automotive and Consumer Electronics products, all growing more than 10% in November compared to the same month last year.
- The Consumer Electronics sector enjoyed growth for the first time in two years, up 10.4% as new games consoles, 50"+ Televisions, Soundbars and Wireless Speakers proved to be very popular Christmas presents.
- Internet sales hit an all-time high in preparation for Christmas this November; with online sales going up 30% compared to November last year and representing 24% of total market value (up from 19% a year ago). More than ever before, online competitiveness is key, as customers are looking for deals, fast deliveries, and convenient ways of buying at home or on the move.

# Which Sectors Have Driven the Market Year on Year?



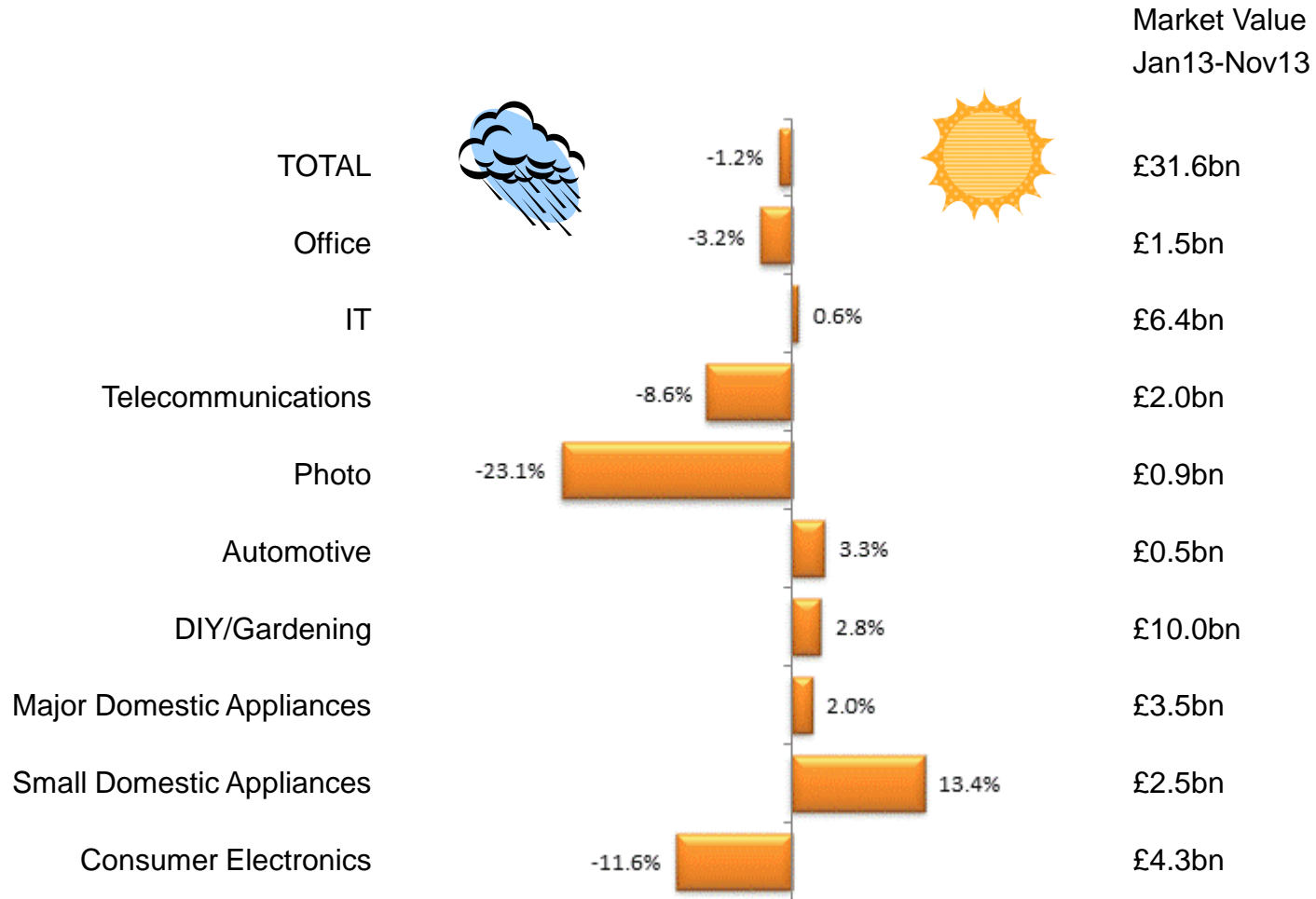
Year on Year % Growth in Value  
(the latest moving annual total versus the previous moving annual total)

Market Value  
Dec12-Nov13



# Which Sectors Have Driven the Market Year to Date?

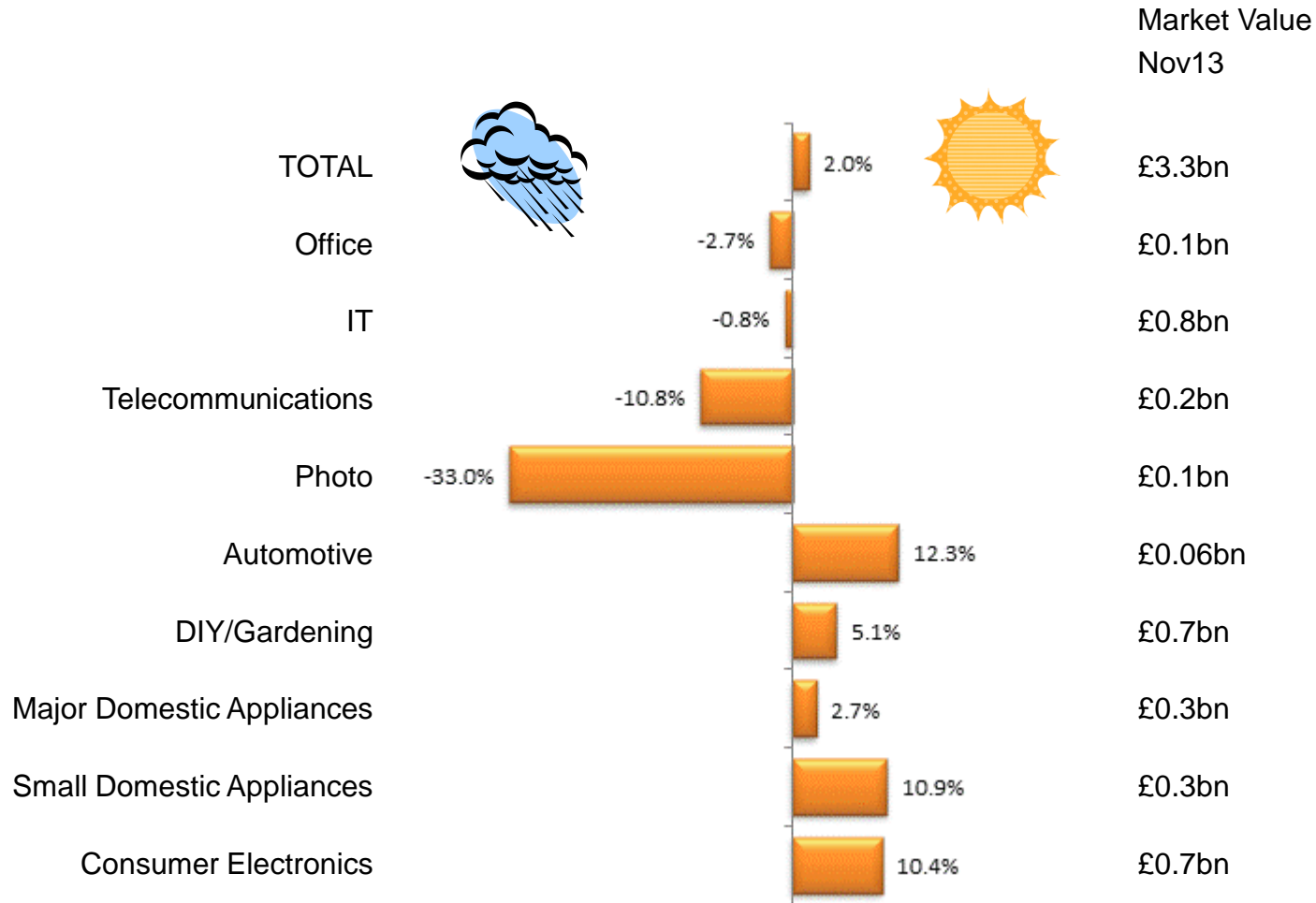
Year to Date % Growth in Value  
(value so far this year versus the same period last year)



# Which Sectors Have Driven the Market Month on Month?



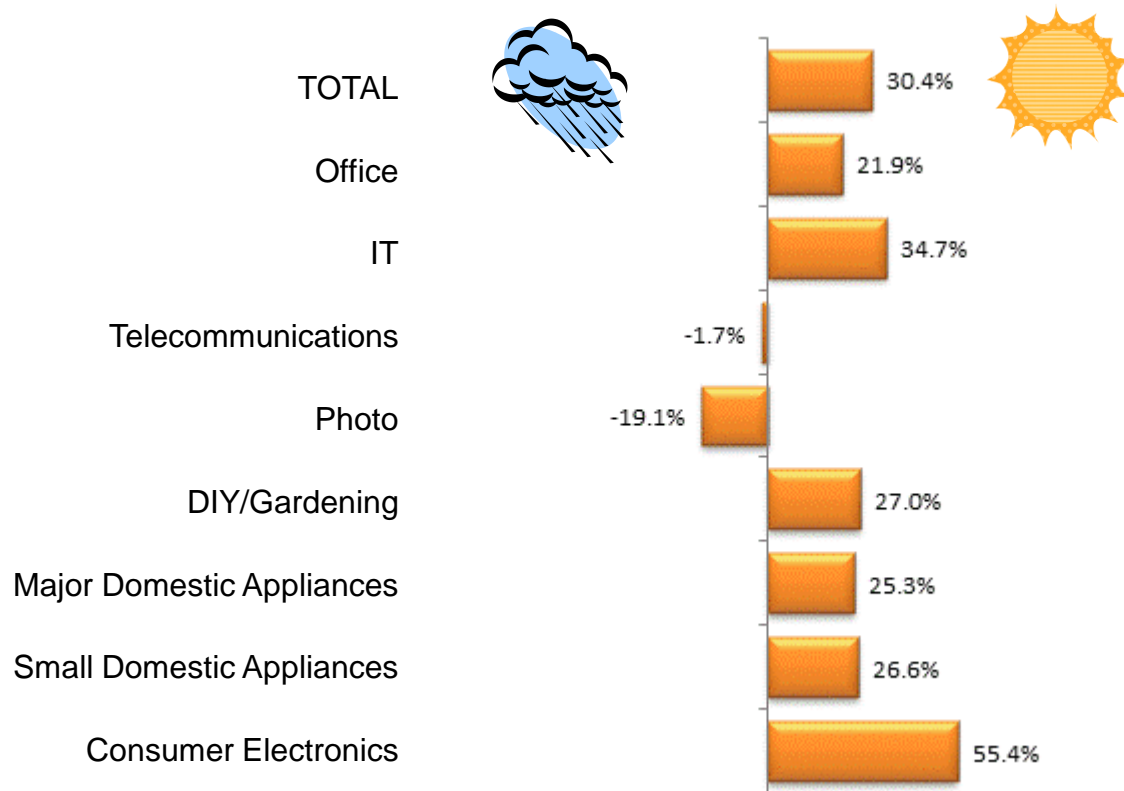
Month on Month % Growth in Value  
(this month versus the same month last year)



# How are Online Sales Performing Month on Month?



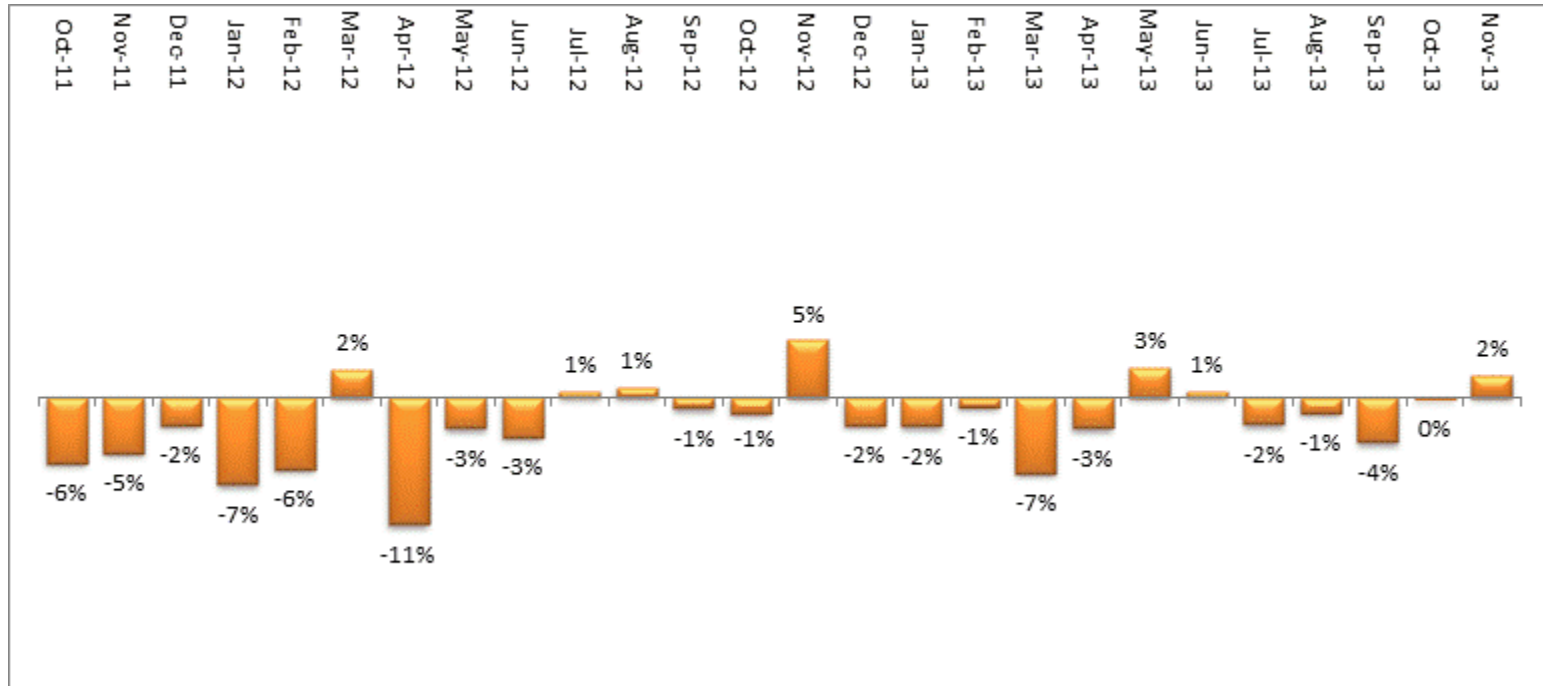
Month on Month % Growth in Online Sales  
(this month versus the same month last year)



# How Has the Total Durables Market Performed?



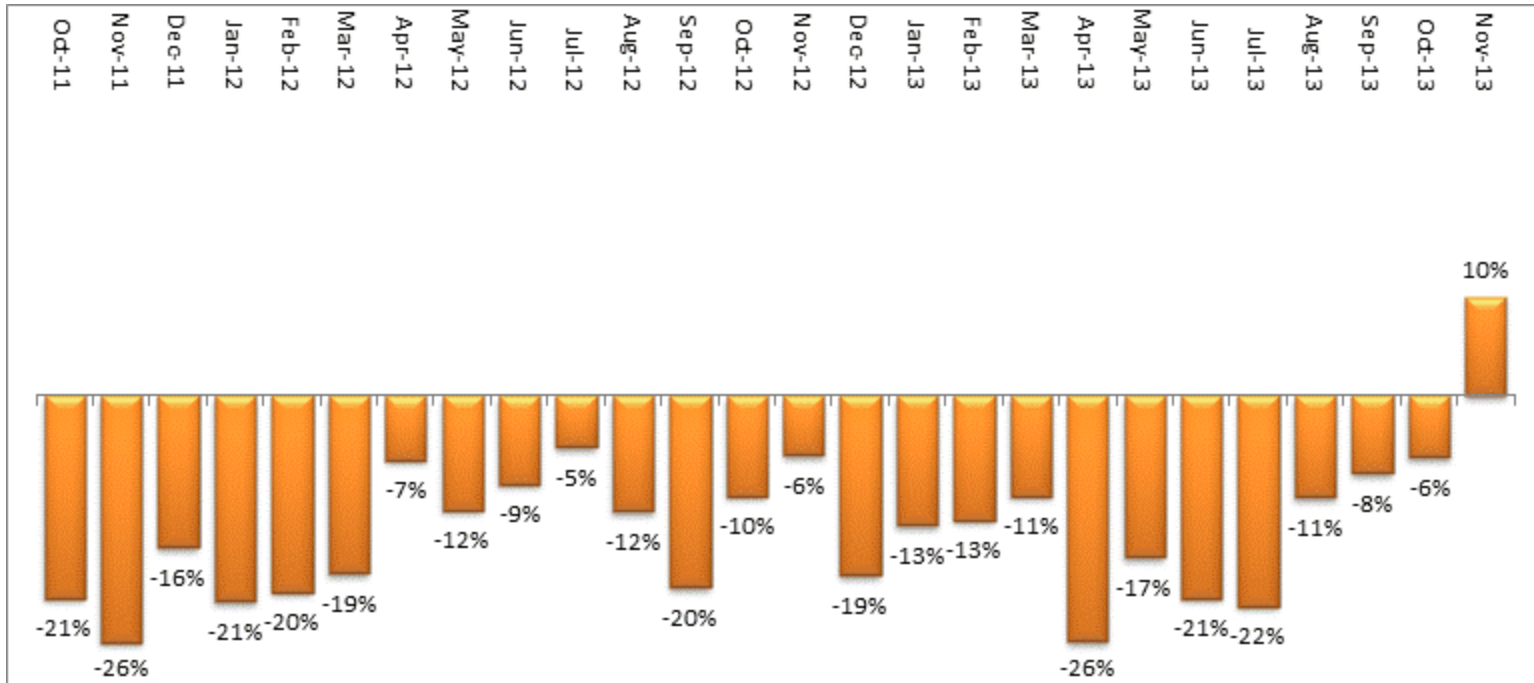
Month on Month % Growth in Total Market Value  
(this month versus the same month last year)



# How Has the Consumer Electronics Sector Performed?



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



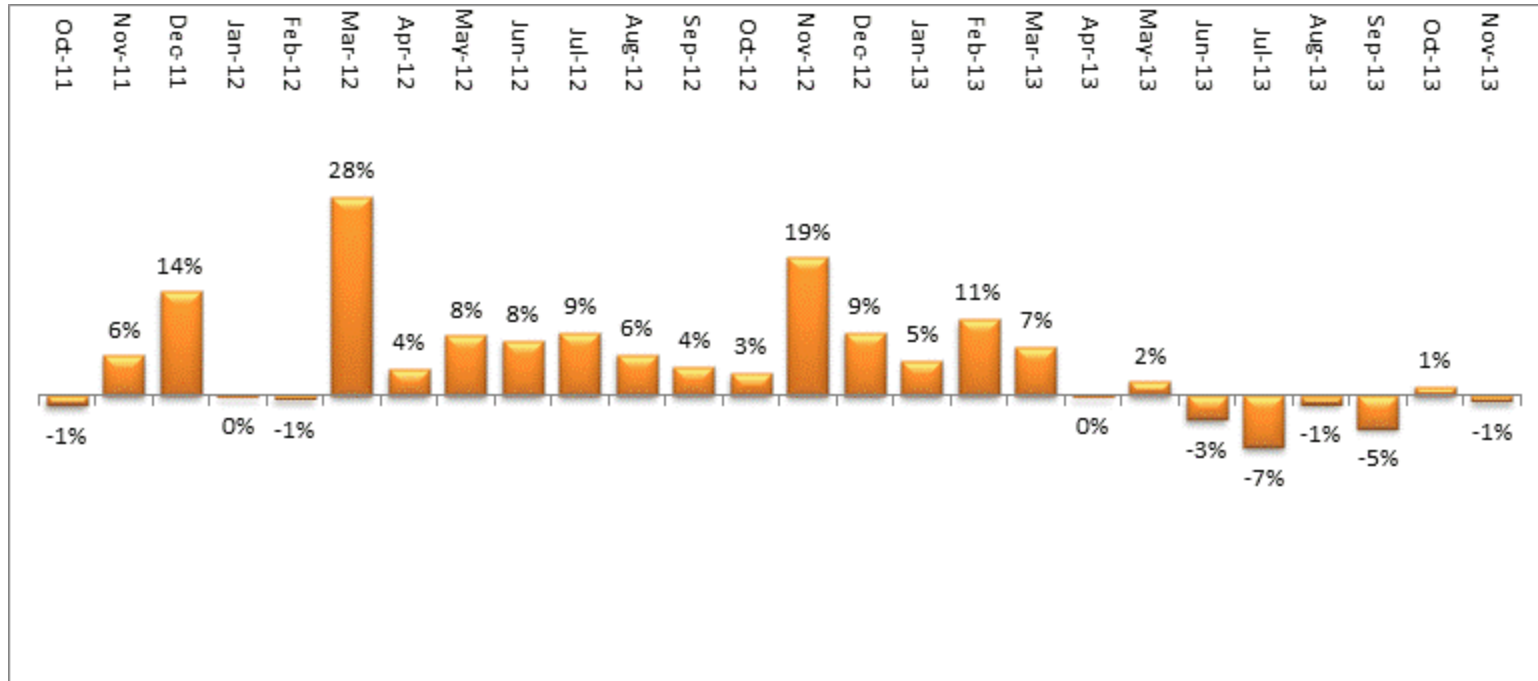
The main stimulus for CE growth in November was provided by the launch of new games consoles from two key manufacturers, added to increases between 50% and 100% for 50"+ TVs, Connected Audio Systems, Soundbars and Wireless Speakers. Other CE products continued to suffer declines.



# How Has the IT Sector Performed?



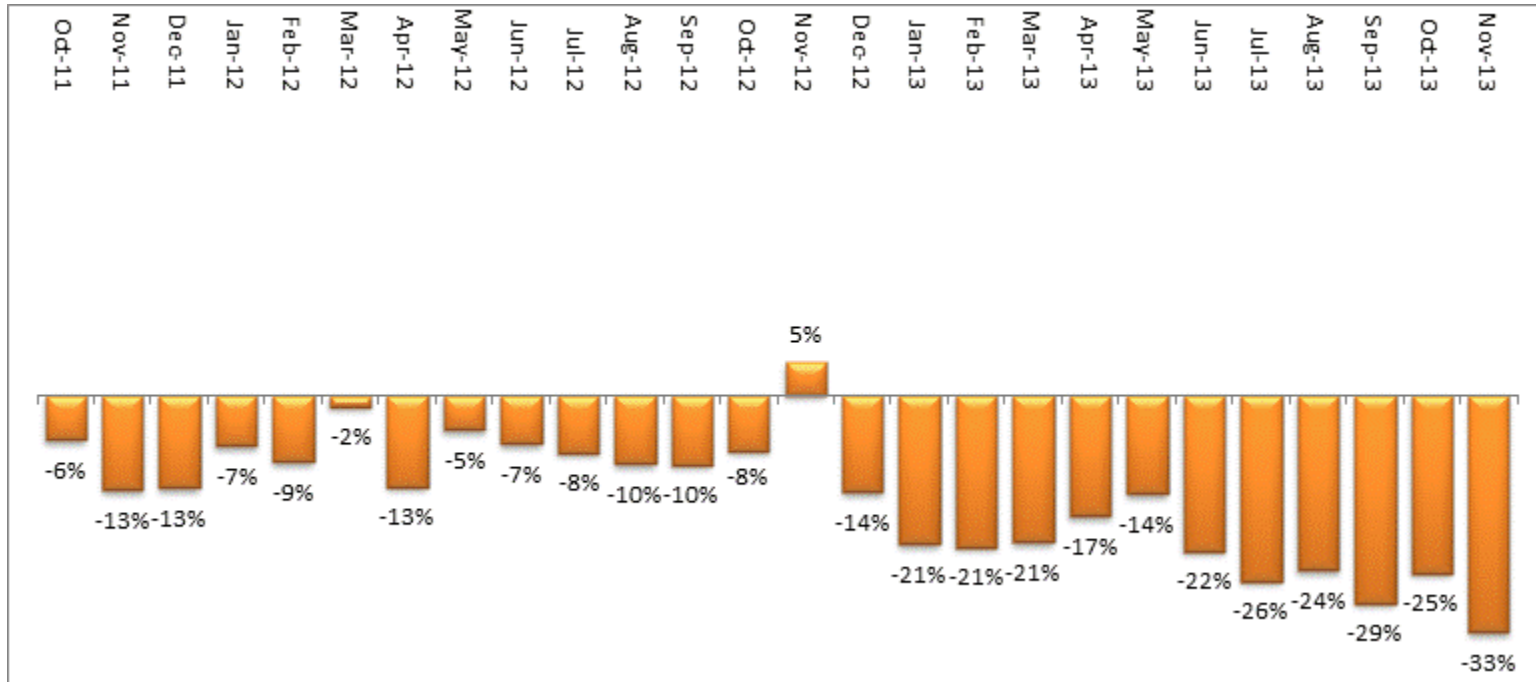
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



November saw the slowing in value growth for several key IT areas in the UK Retail market. Media Tablets, Monitors and Comm. Cards. all had a slowing of YoY growth compared to October. The decline was tempered by a strong performance for E-Readers and Desktop Computers.

# How Has the Photo Sector Performed?

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

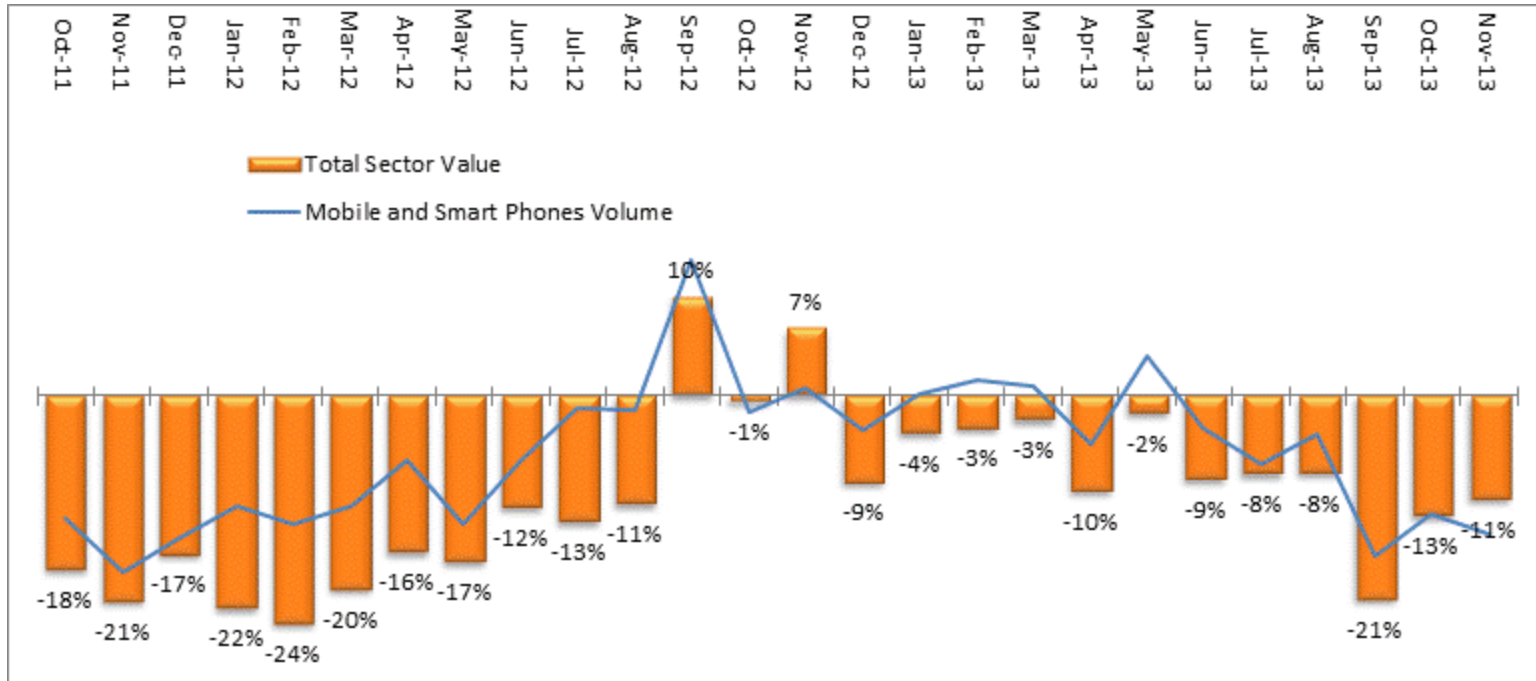


For the Imaging markets Q4 2013 was always going to be difficult compared to a strong performance in Q4 2012. The slump in performance for changeable lens cameras, now at decline levels seen for fixed lens products for most of 2013, has significantly hit the overall camera market volume, but even more so the value. With only half the number of Compact System Cameras sold in November 2013 compared to a strong promotional period in November 2012 and SLR volumes down by a third – the premium end of the market has been hit hard. It won't be until January 2014 that we start to see more favourable comparison periods and real insight into the state of the market.

# How Has the Telecommunications Sector Performed?



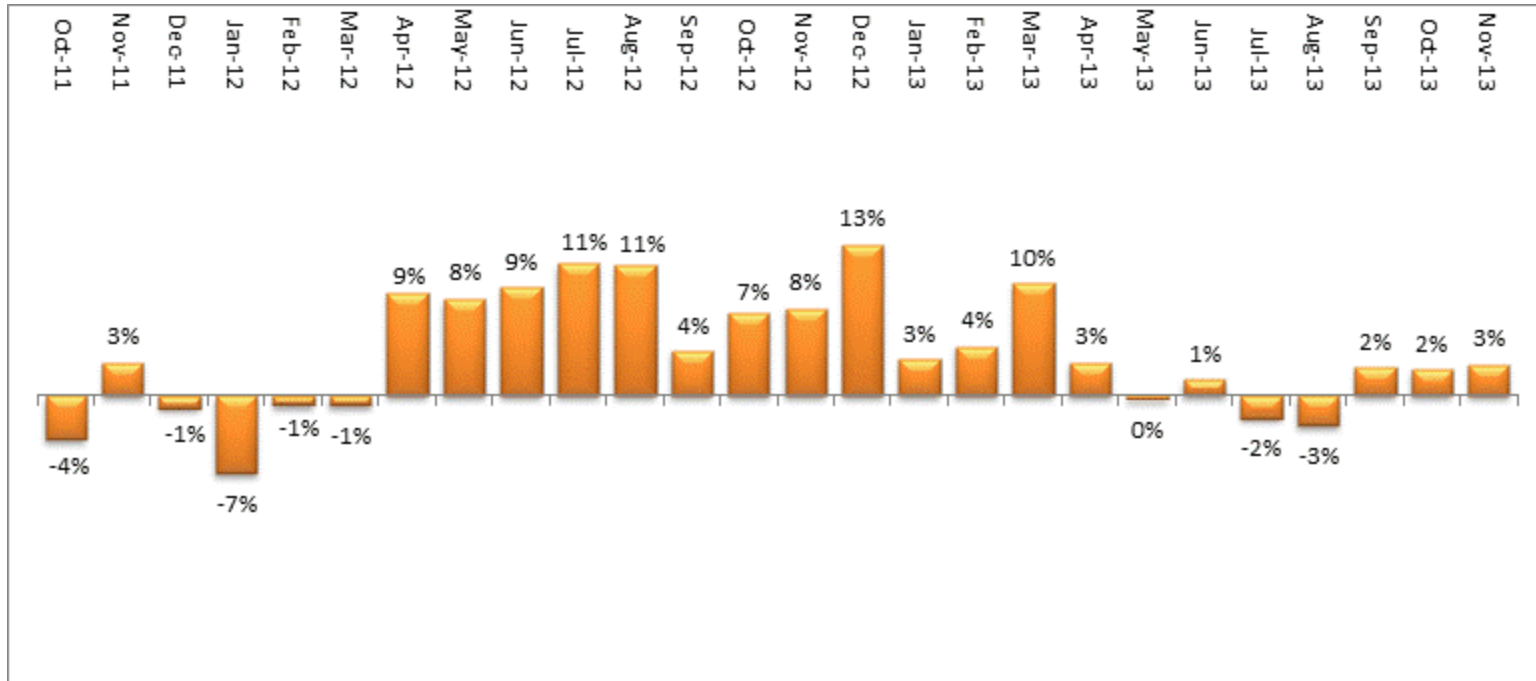
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



In the mobile tariff market, Contract SIMs have been increasing in sales at a great rate in 2013. For November 2013, the market saw a volume increase of ~25% against the same period last year. This growth is mirrored by declines in the Contract Handset market, which is down for November by ~10% against last year.

# How Has the Major Domestic Appliances Sector Performed?

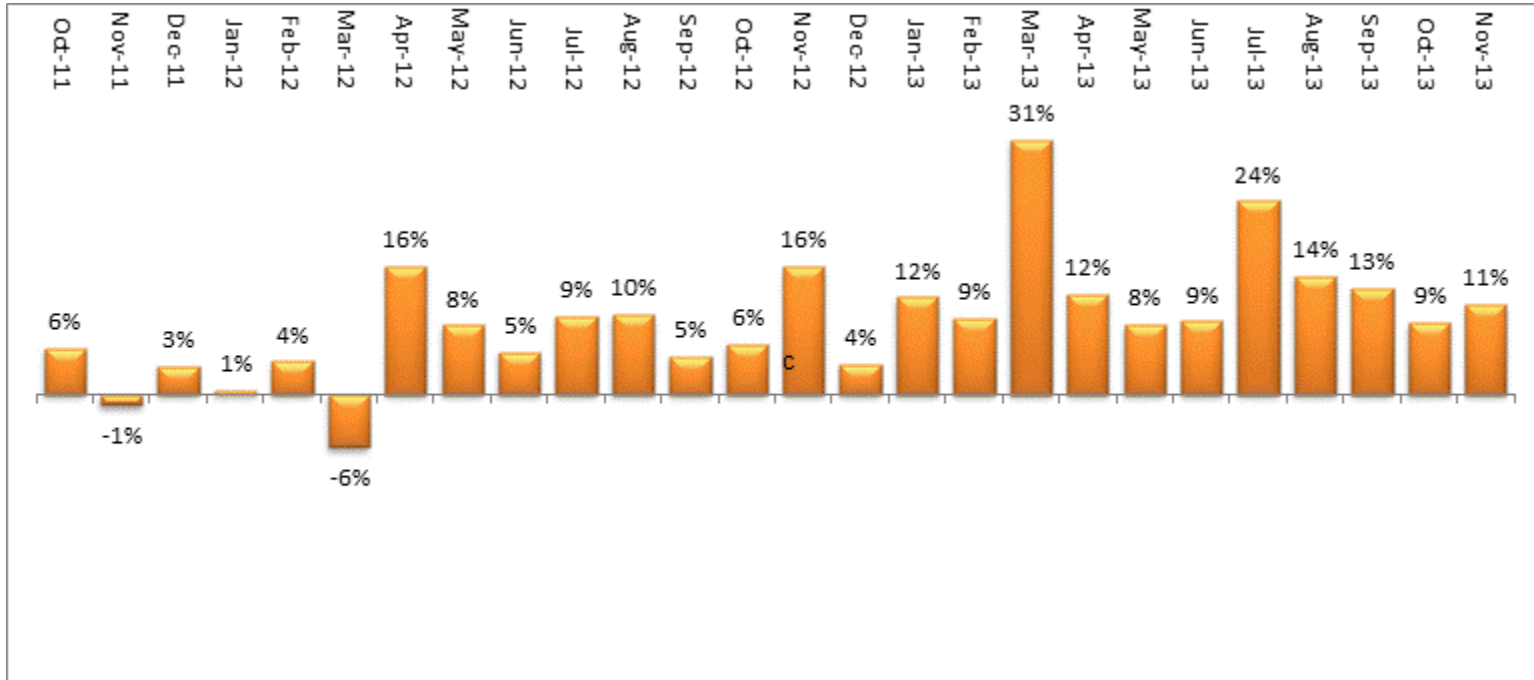
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



The built in sector remains the key driver of growth in November with sales up 9% versus last year, compared to just 1% for freestanding appliances. Sales of ovens, hobs and hoods combined are up by almost £4m compared to Nov 13.

# How Has the Small Domestic Appliances Sector Performed?

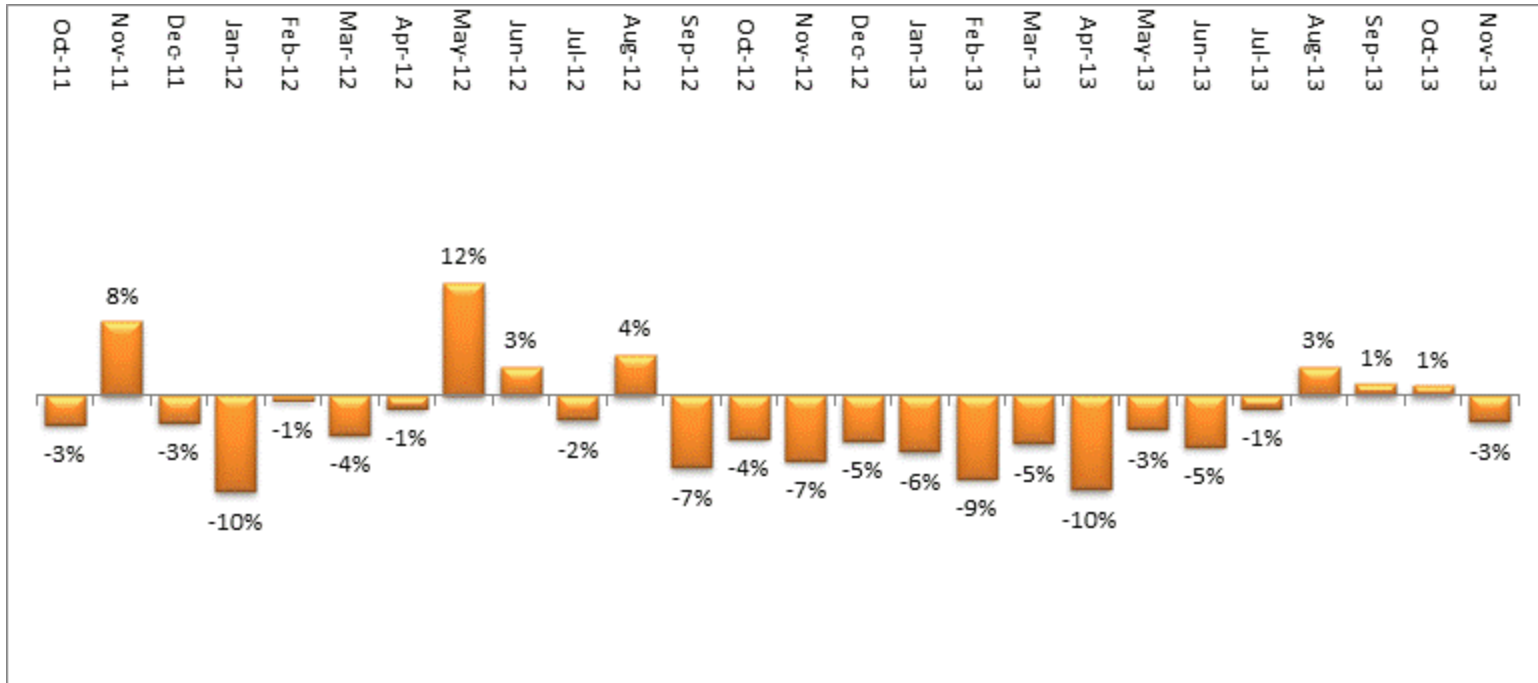
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



This season is especially important for personal care appliances and sales here really picked up with hair stylers increasing value by 20%. In small kitchen, juicers remain the biggest growth market in November, whilst hot beverage makers was a dependable solid performer. Home comfort categories had an excellent month of sales across value and volume as floor care and seasonal products delivered strong results.

# How Has the Office Sector Performed?

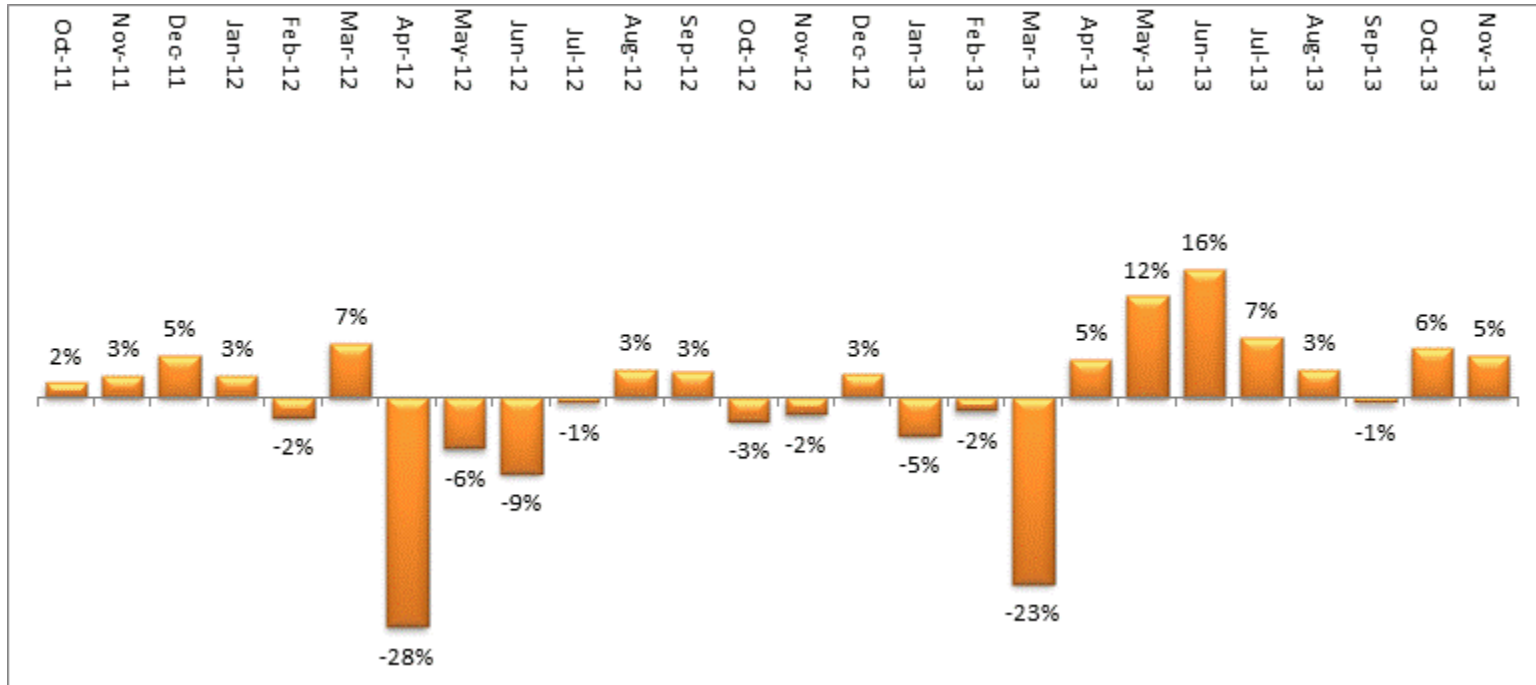
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



Recent stabilisation of the high value Inkjet Cartridge market has faltered this month tipping the overall Office sector back into decline for the first time in 4 months. This overshadowed a strong performance across many of the Stationery categories, including Adhesive Tapes, Office Adhesives and Markers, in particular.

# How Has the DIY/Gardening Sector Performed?

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

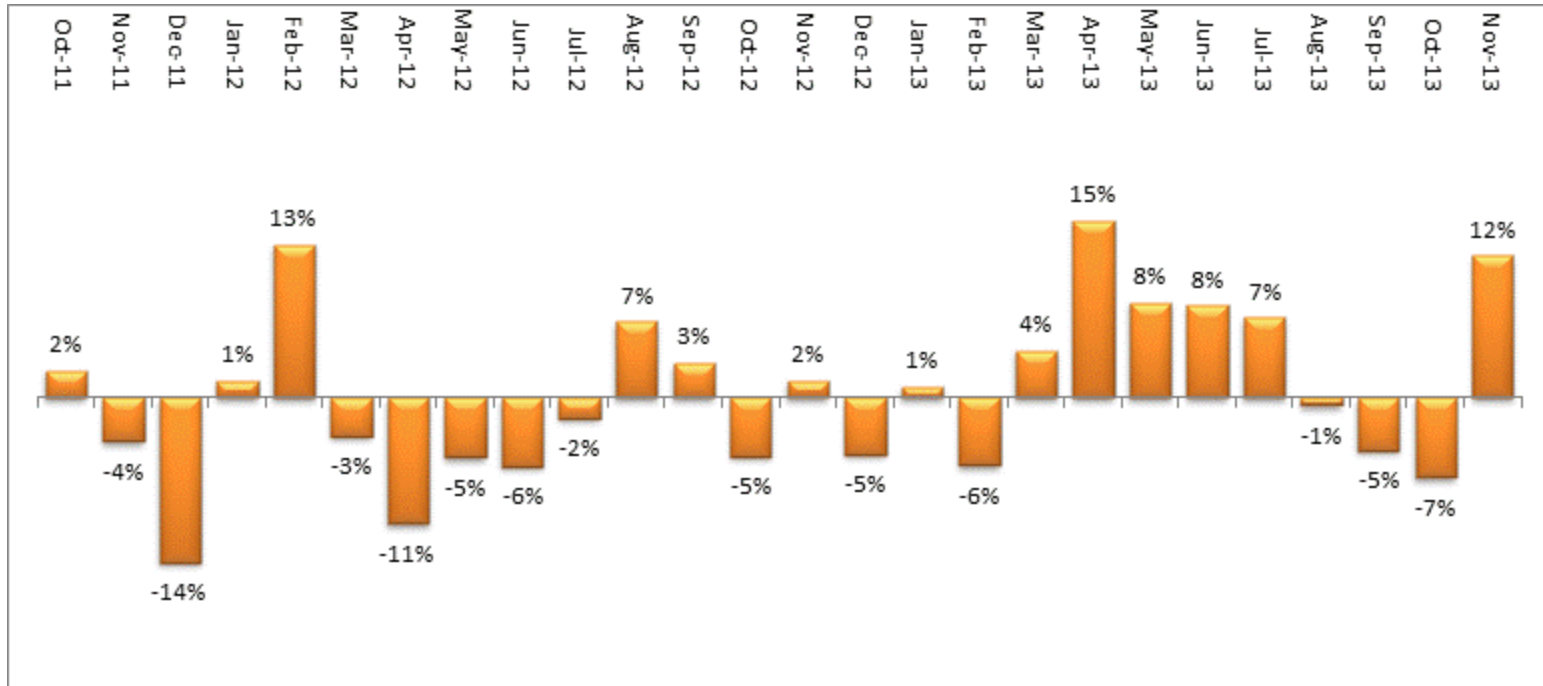


The government's help-to-buy scheme helped to fuel growth in decorative and tool sectors within DIY, while garden tool and garden care sectors grew thanks to a drier and sunnier November than in 2012.

# How Has the Automotive Sector Performed?



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



The Automotive sector was up 11.3% in value comparing Nov 13 VS Nov 12 – thanks to growth driven by the winter chemicals categories such as Screen wash, Anti-freeze and De-icer; contributed to by the weather conditions during this time of the year.



# 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

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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