



GfK Market-i

An Insight into April 2014 UK Retail Durable Sectors

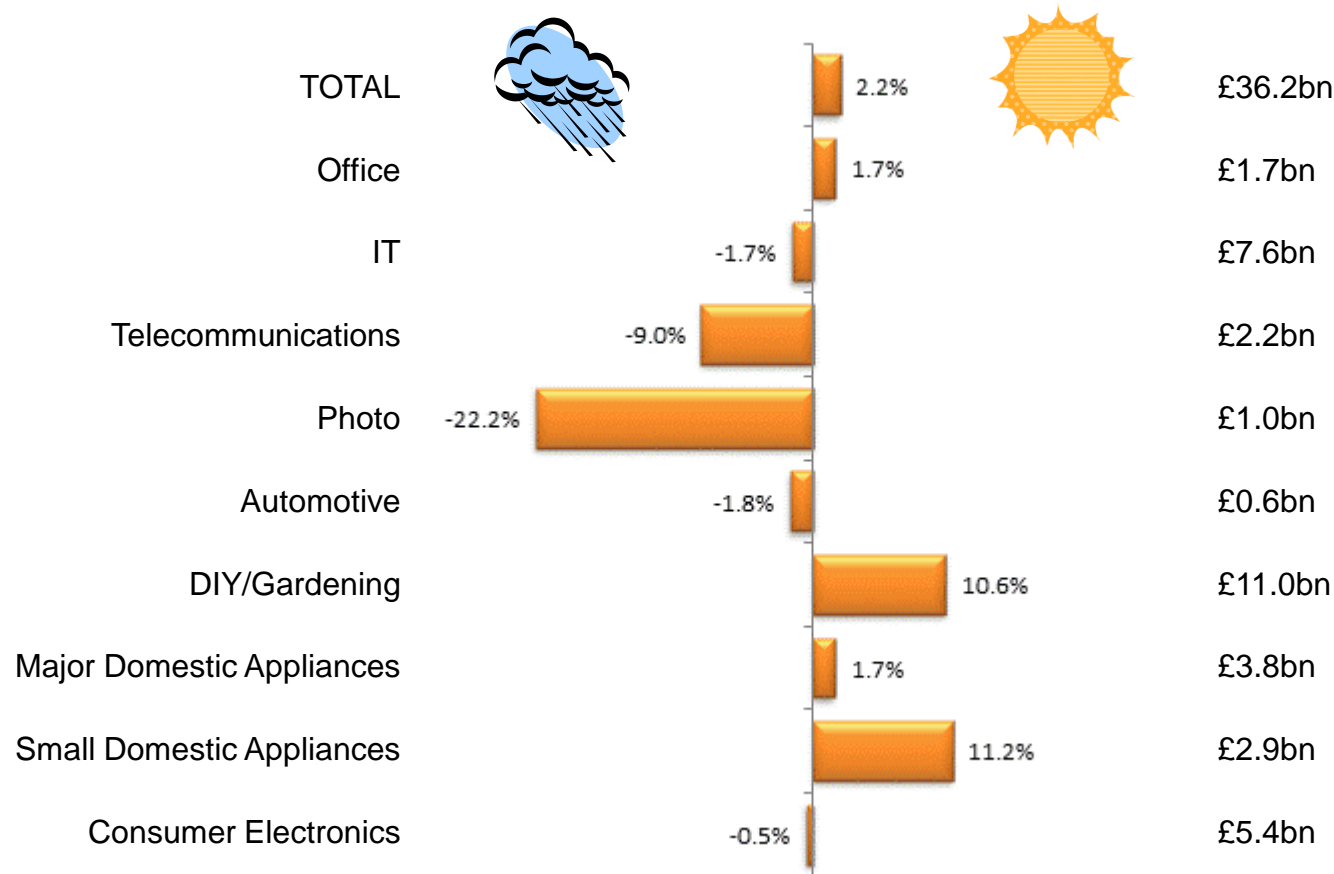
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- April 2014 sees the total durables market continue to grow for the sixth consecutive month. Total market value grew 8.8% month on month, reaching £2.8bn compared to the same month last year.
- For heavily promoted product categories, an example being televisions in the consumer electronics sector, the presence of the Easter shopping days in April 2014 (which were not included in April 2013) makes the situation look more positive.
- The timing of the Easter shopping days also appears to boost the DIY/gardening sector. With the double bank holiday traditionally a time for entertaining and home improvement, the value attributable to the sector grows 20.7% compared to April last year (which was also less favourable in terms of weather).
- Online remains the best performing distribution channel, up 14.8% compared to April last year with only the photo sector showing a decline.

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)

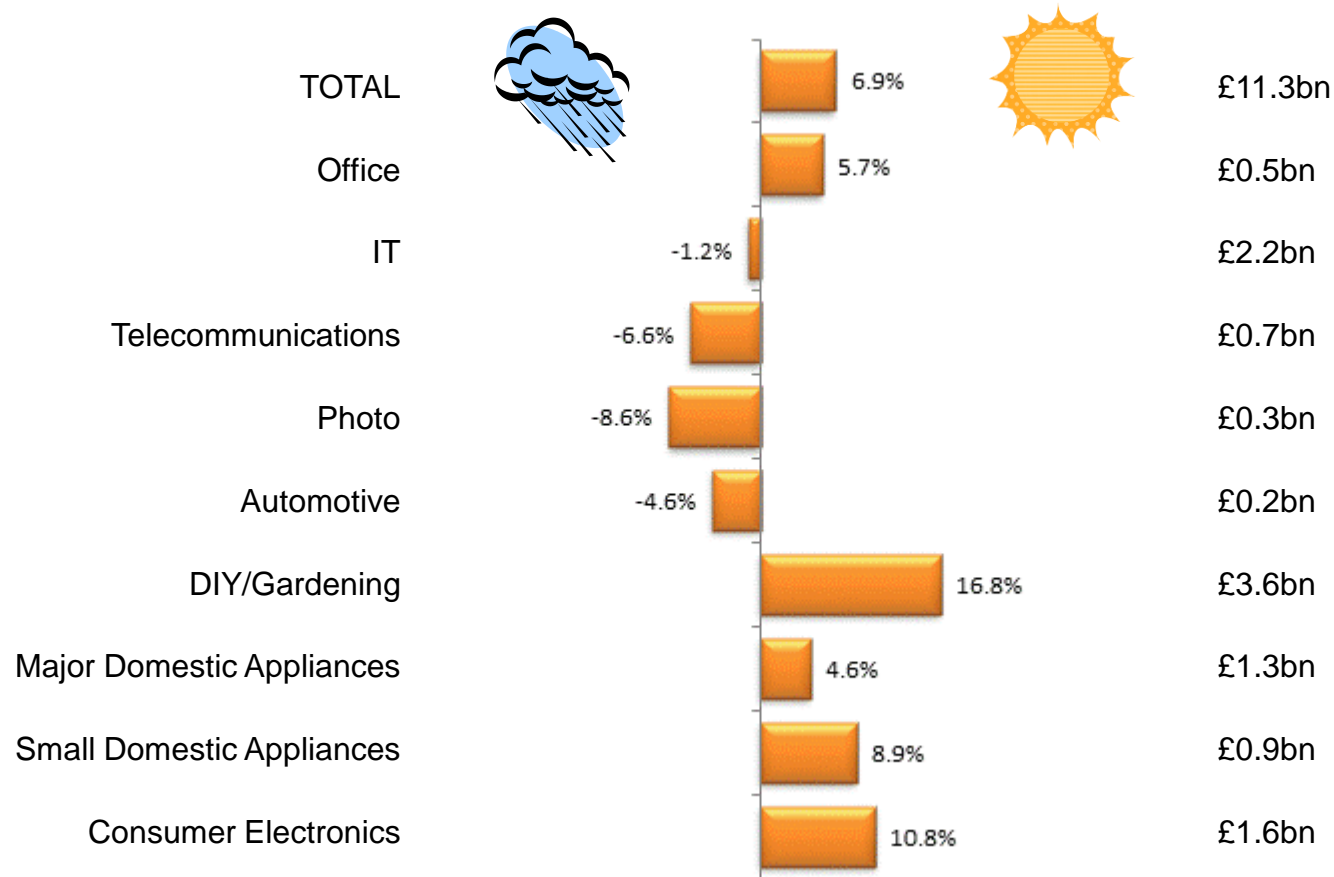
Market Value
May13-Apr14



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-Apr14

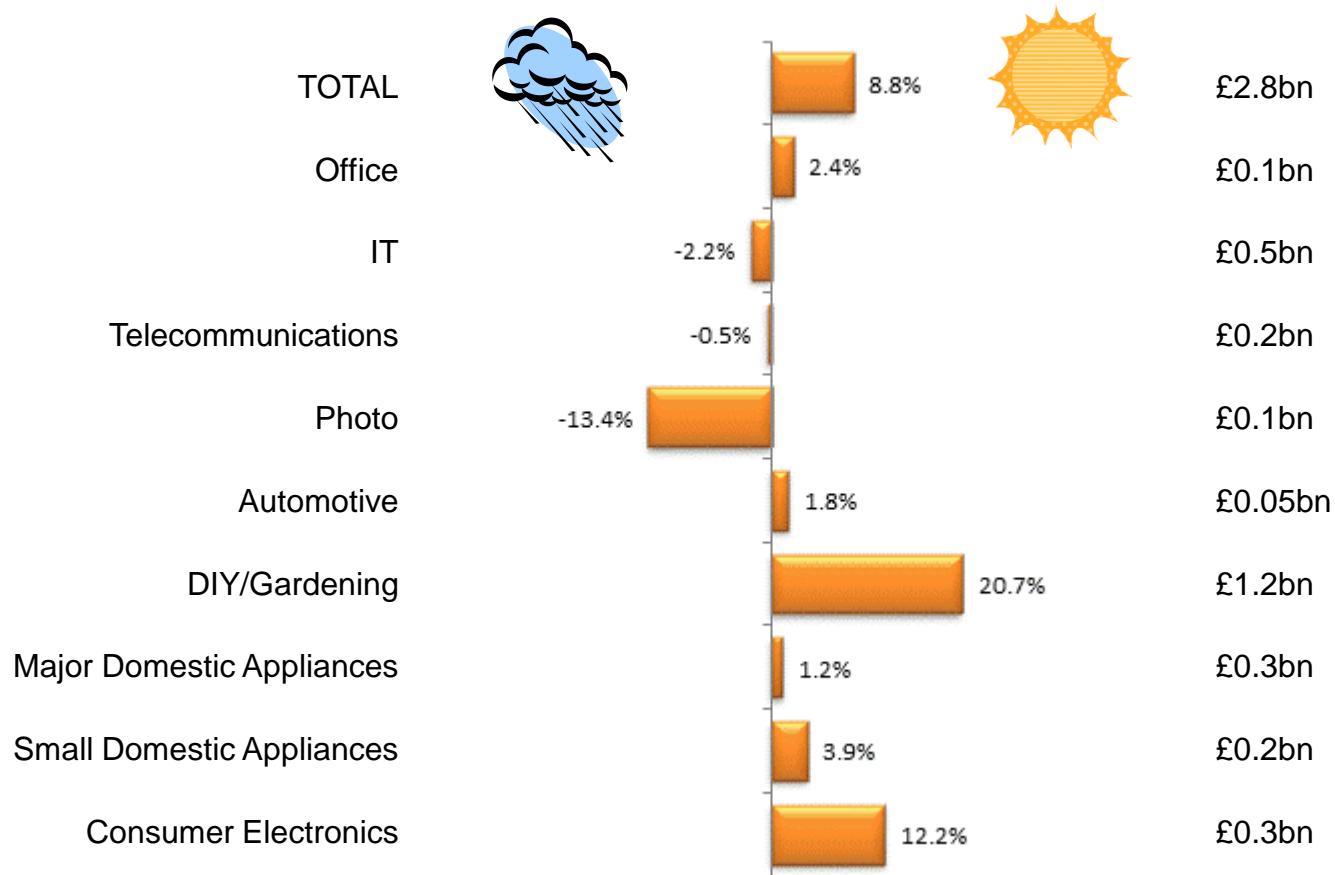


Which Sectors Have Driven the Market Month on Month?



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

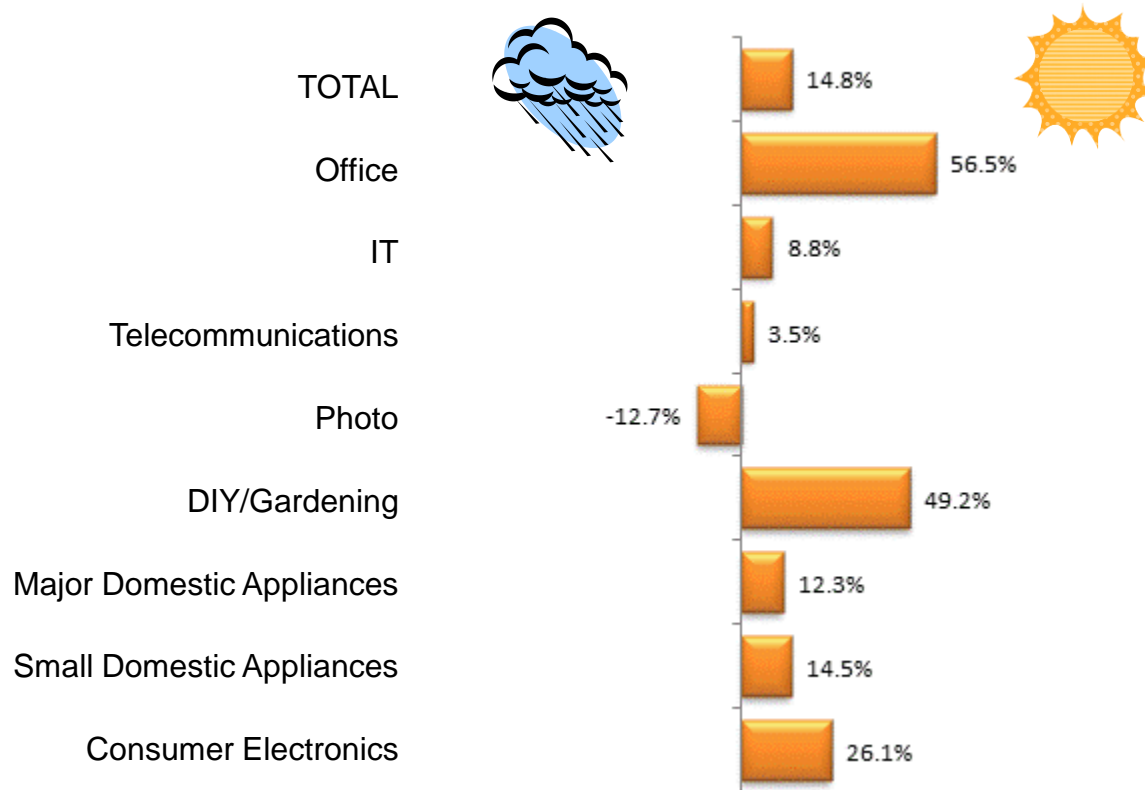
Market Value
Apr14



How are Online Sales Performing Month on Month?

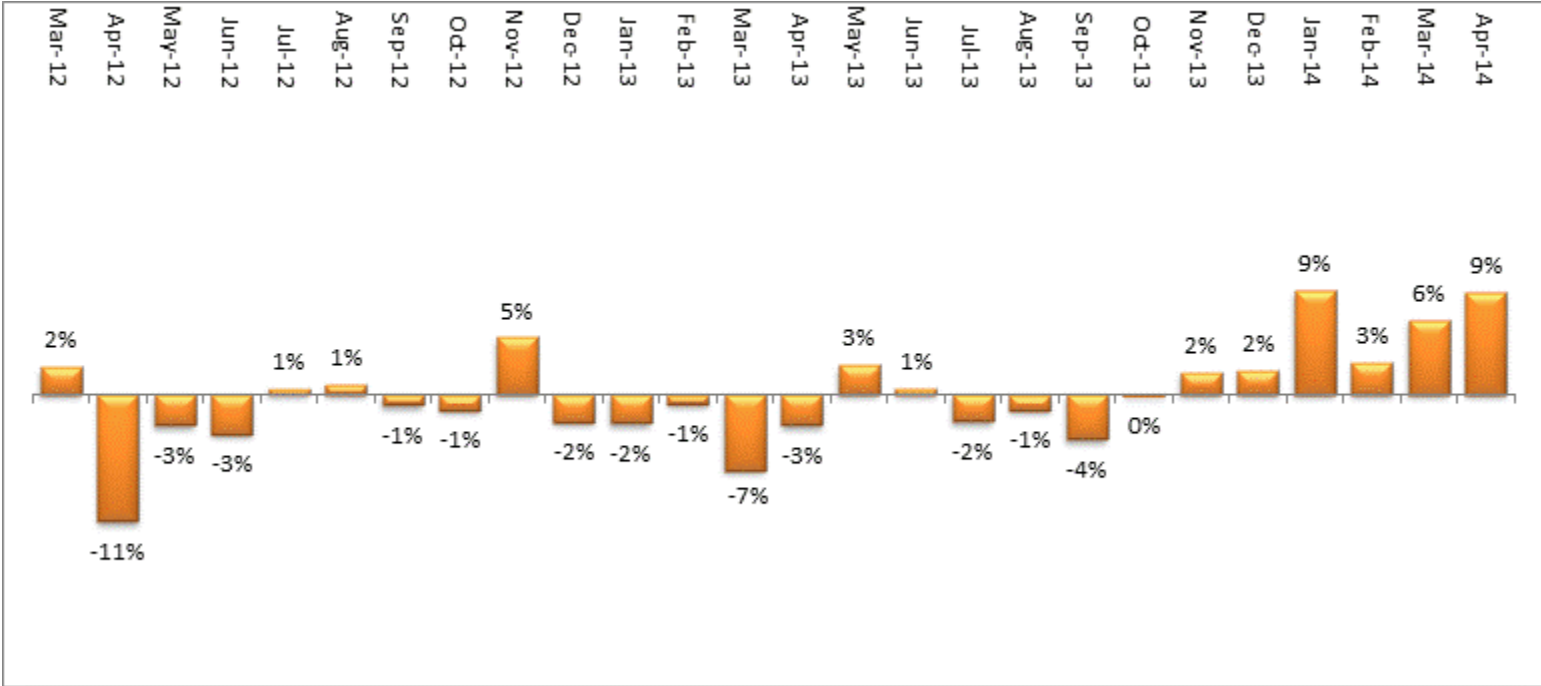


Month on Month % Growth in Online Sales
(this month versus the same month last year)



How Has the Total Durables Market Performed?

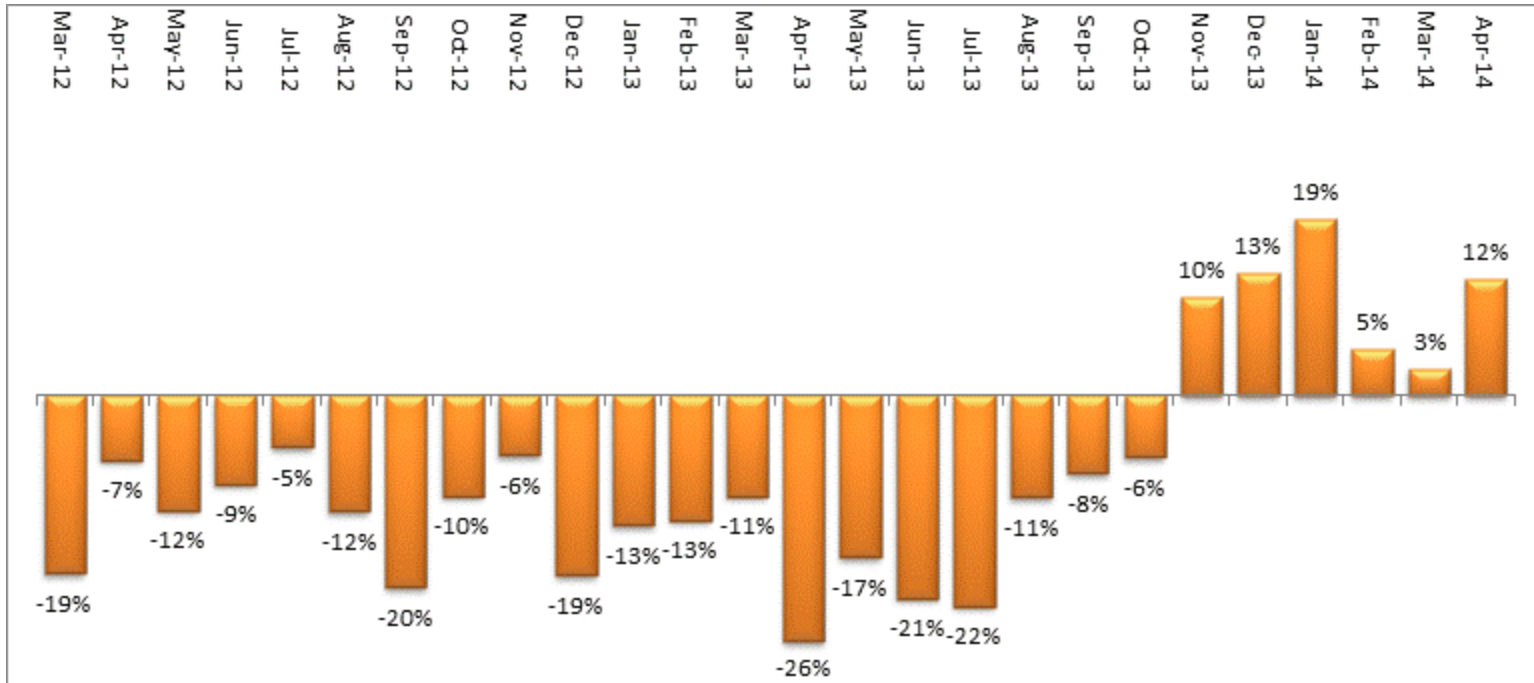
Month on Month % Growth in Total Market Value
(this month versus the same month last year)



How Has the Consumer Electronics Sector Performed?



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

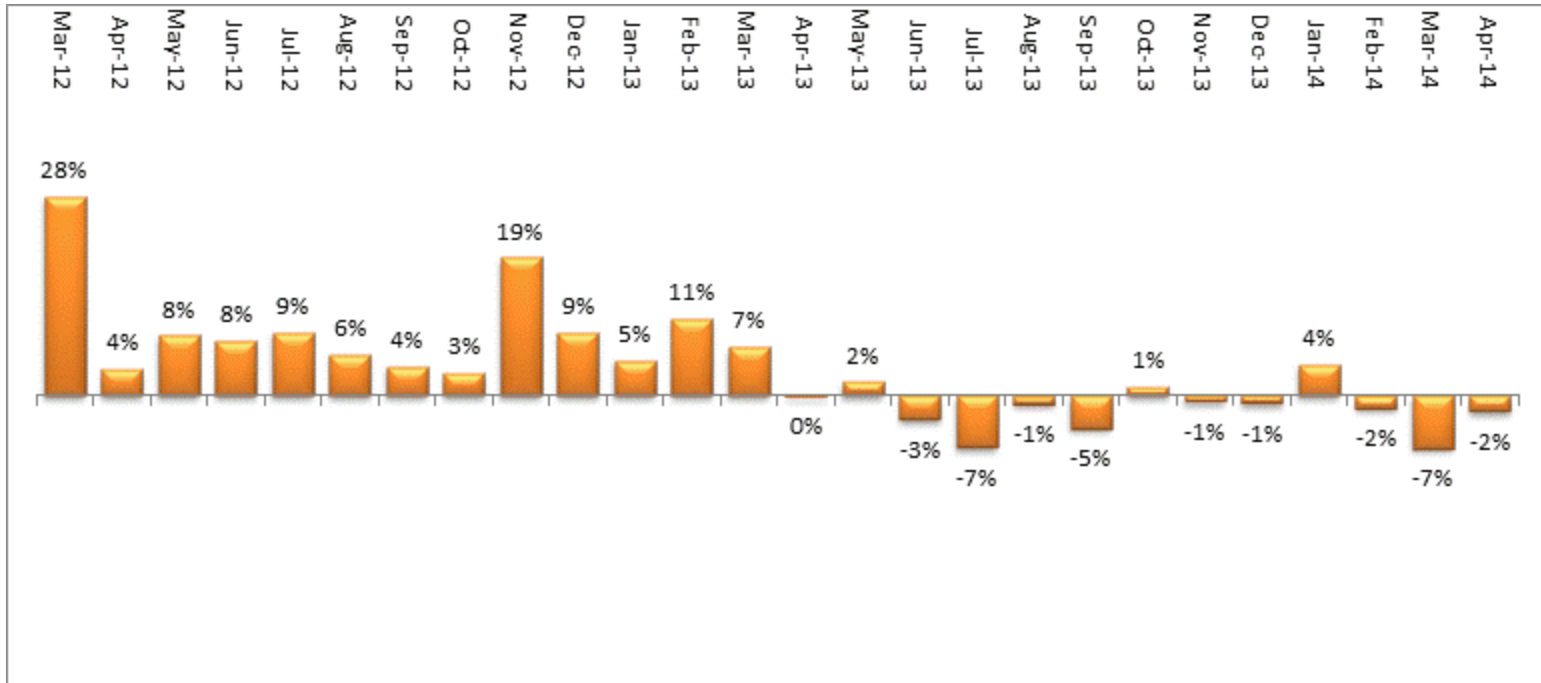


For the consumer electronics sector, the figures are positive in April for three main reasons. First of all, the Easter uplift in 2014 occurred in April (compared to 2013 where it had occurred in March). The second reason is that since October 2013, the launch of new video games consoles has taken the sector back into growth (not including video games consoles, the month on month growth in April 2014 would have been 6%). The third reason is that several categories have seen recent uplifts, including 40in+ televisions, a number of wireless audio products and television accessories (including cables, mounts and sound bars).

How Has the IT Sector Performed?



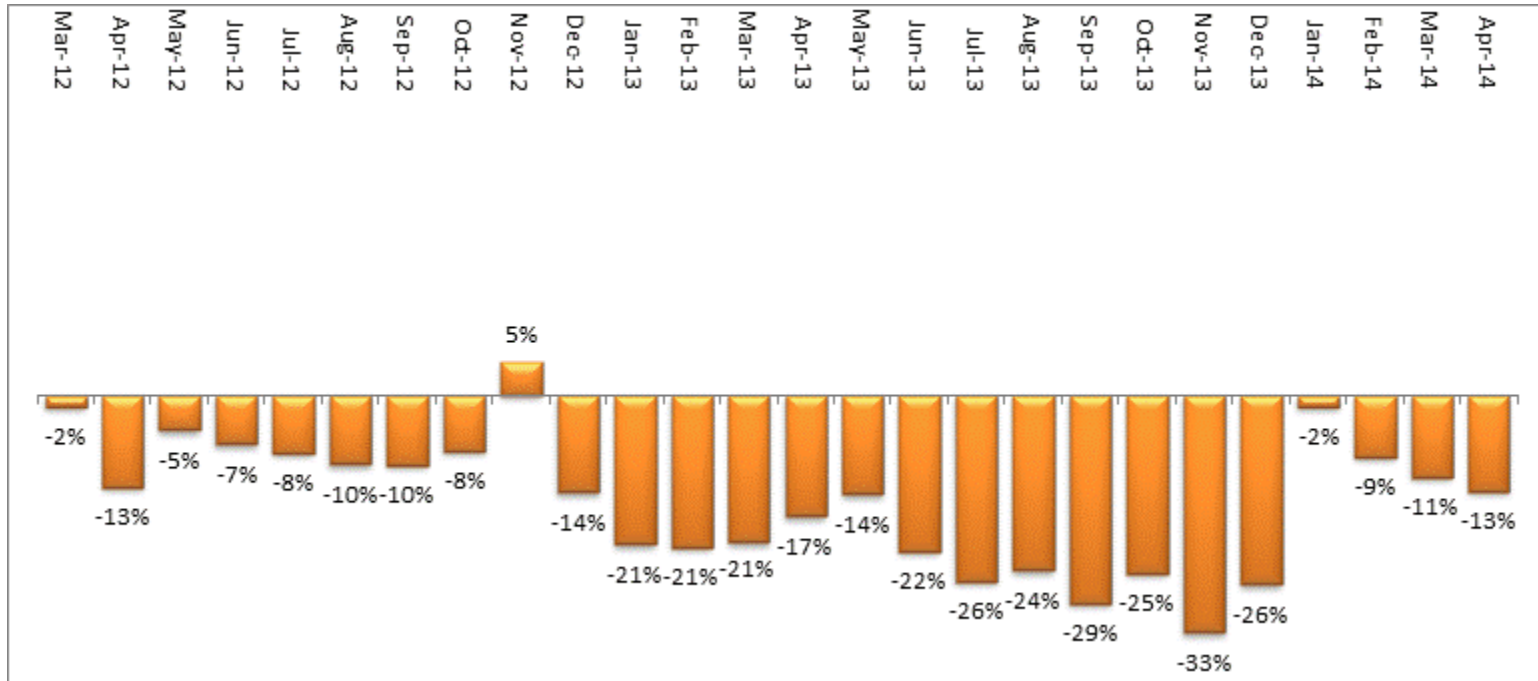
Month on Month % Growth in Sector Value
(this month versus the same month last year)



The IT sector experienced a slight value decline overall in April 2014 as media tablets experienced their 2nd consecutive month of volume decline and 3rd consecutive month of value decline as the category displays early signs of market saturation. Despite an overall decline, desk computing and monitors maintain growth in April as the rise of PC gaming continues to affect the traditional computing market.

How Has the Photo Sector Performed?

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

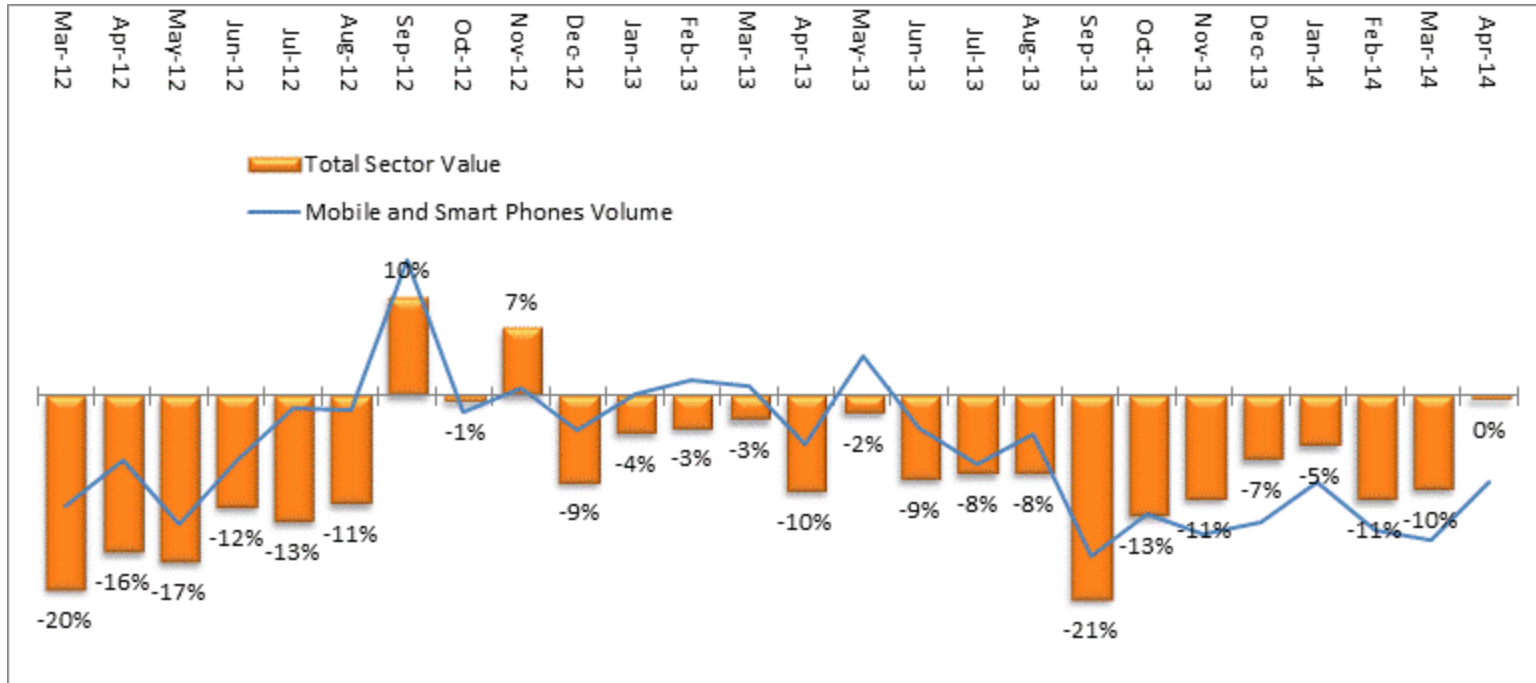


As the market moves more and more to replacement, higher end and innovative products are still outperforming the entry level ones. Furthermore the accessories market is enjoying value growth in line with a better performance of higher end cameras.

How Has the Telecommunications Sector Performed?



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

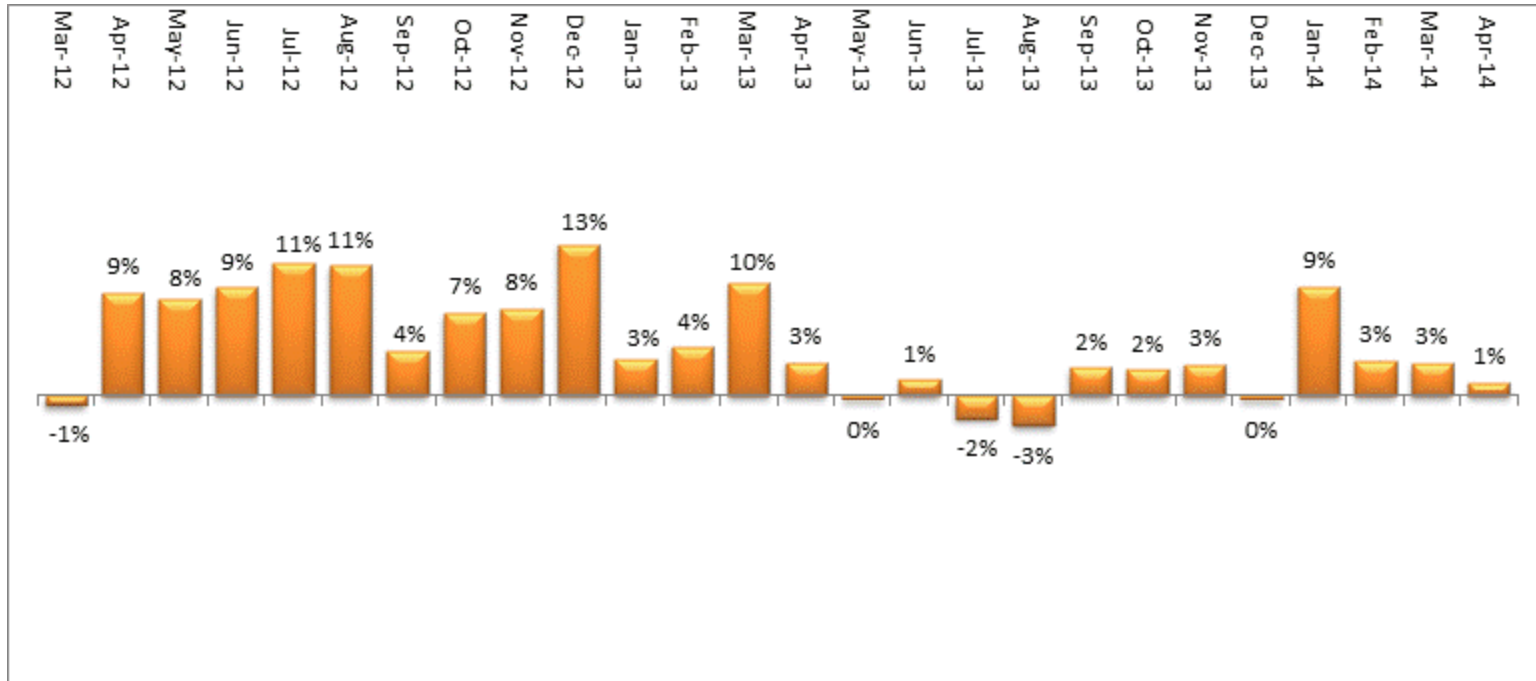


Smart phones are seeing declines in sales of 1% in April 2014 compared with April 2013. This is the eighth consecutive month that we have seen declines for this area of the market, however it seems that the rate of this decline is slowing when comparing April's decline in sales to other periods.

How Has the Major Domestic Appliances Sector Performed?



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

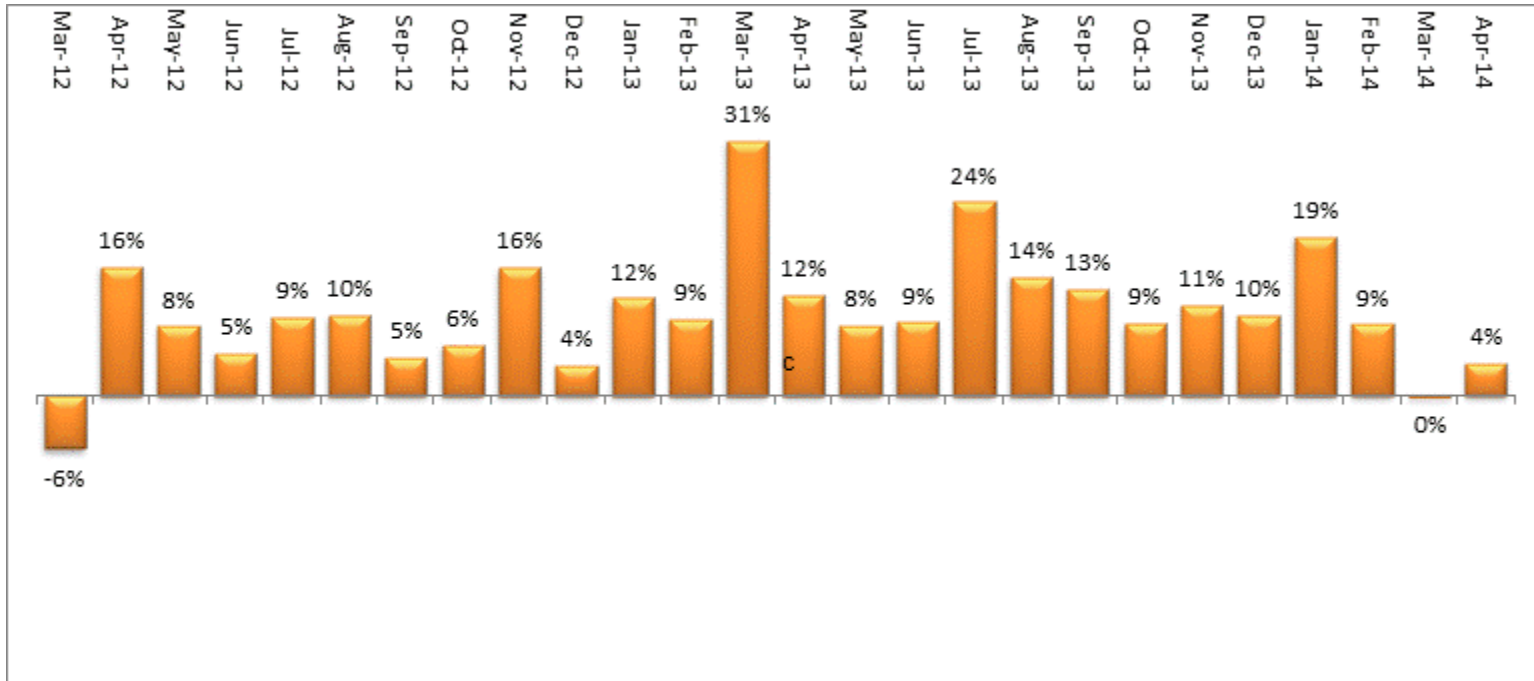


The most significant contributors to the growth in the major domestic appliances sector are refrigeration and washing machines which grow 11% and 6% respectively month on month. This growth is depressed by the performance of cookers and ovens which decline 5% compared to April last year.

How Has the Small Domestic Appliances Sector Performed?



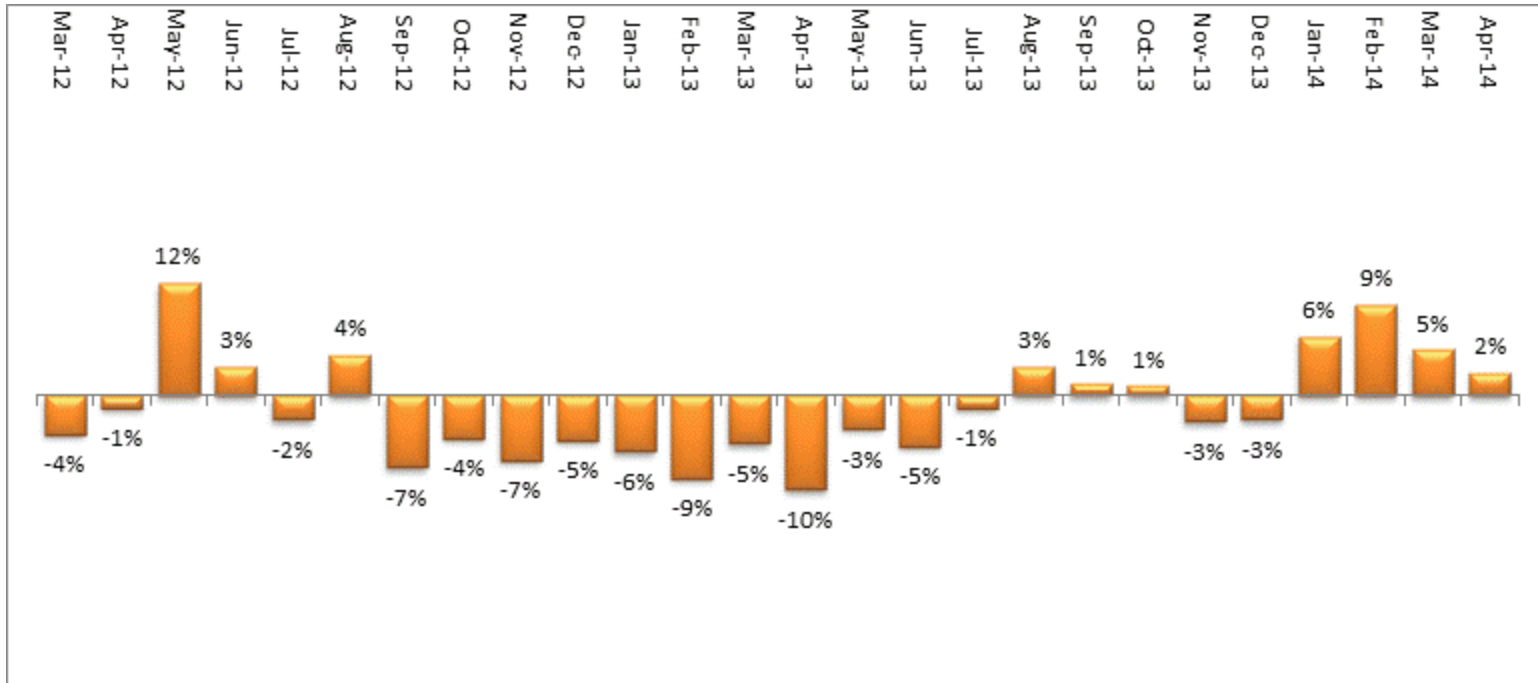
Month on Month % Growth in Sector Value
(this month versus the same month last year)



Vacuum cleaners contribute the most in terms of value growth for the small domestic appliances sector, growing 4% compared to April last year. In personal care, hair products perform well with hair stylers and hair dryers up 15% and 6% respectively month on month.

How Has the Office Sector Performed?

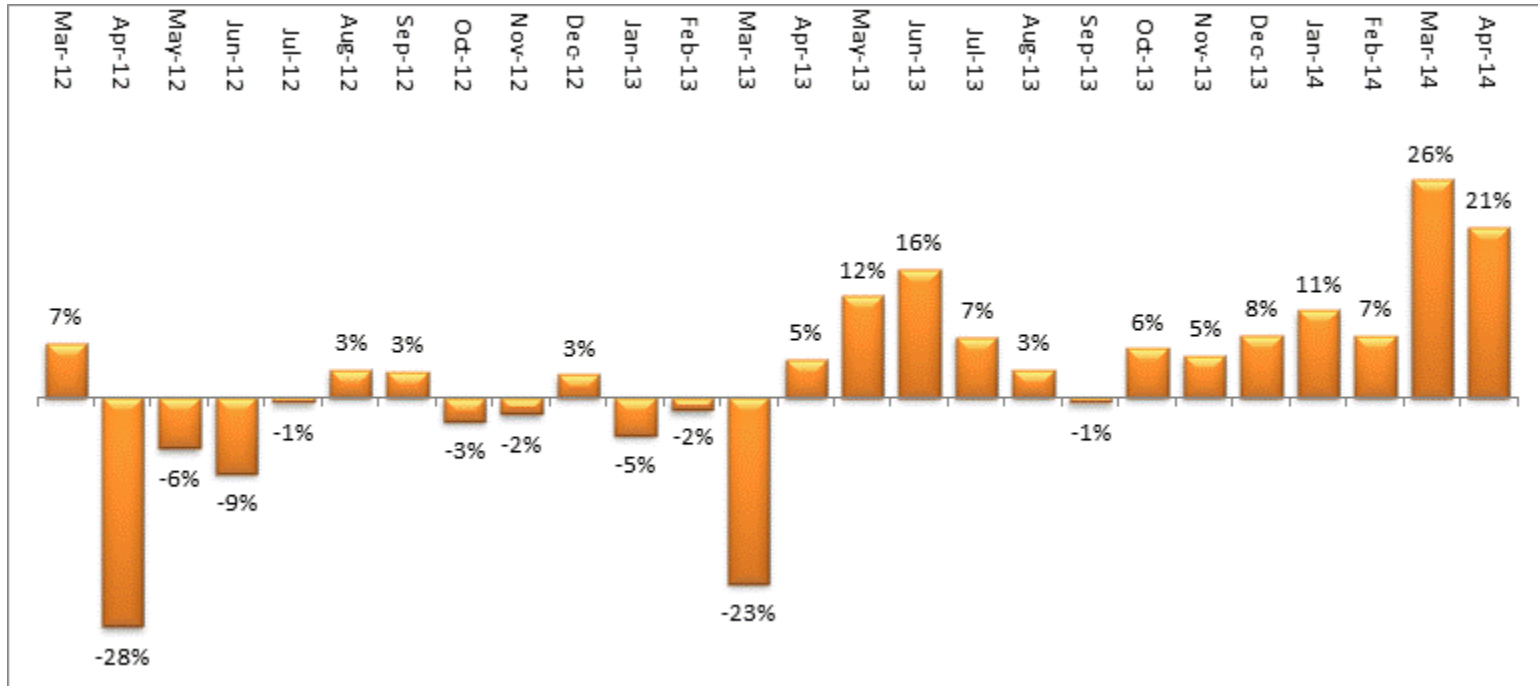
Month on Month % Growth in Sector Value
(this month versus the same month last year)



There are mixed results in the writing product categories – ball point pens grow 11% whilst fountain pens decline 7% month on month. Meanwhile in the paper product categories, coated paper and office paper decline 15% and 2% respectively.

How Has the DIY/Gardening Sector Performed?

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

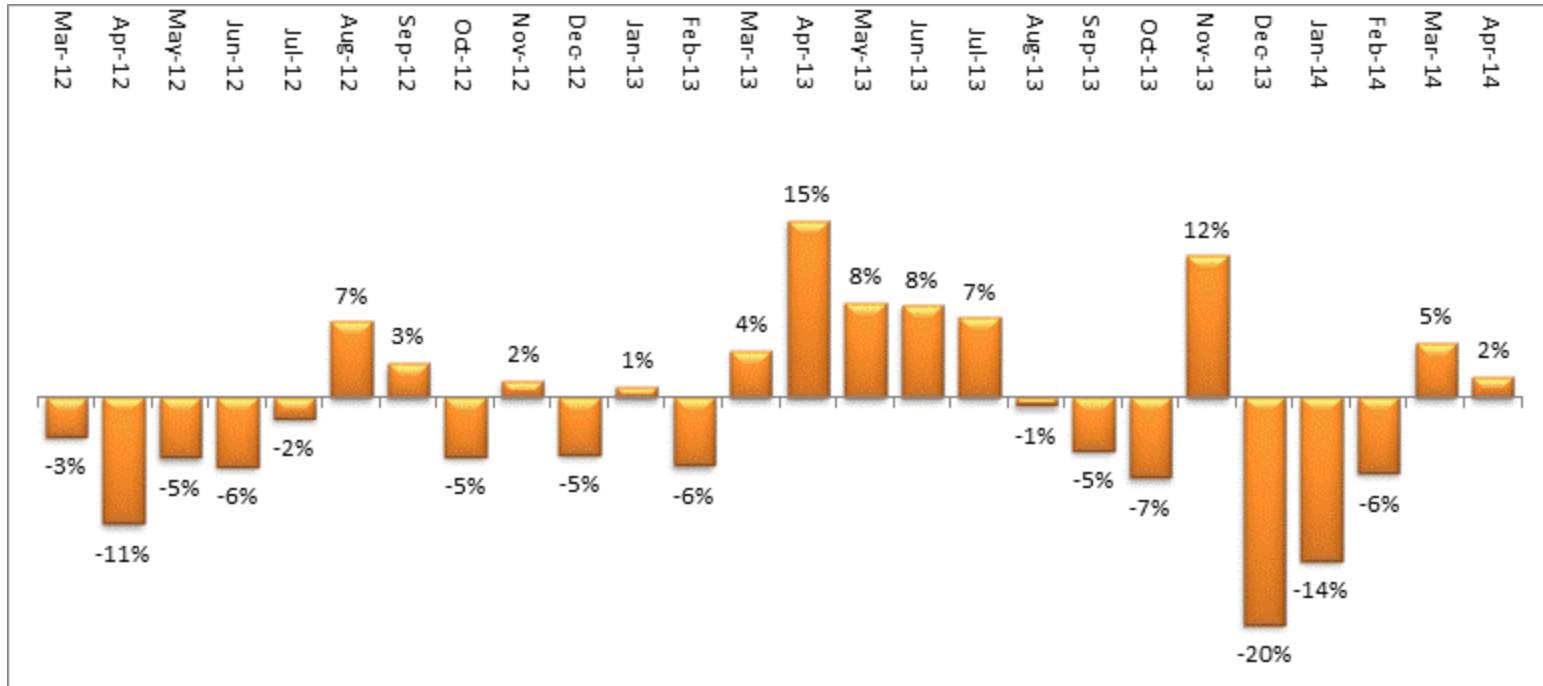


Unsurprisingly the gardening segment experiences a major upturn in value compared to April last year (due to the addition of the Easter shopping days that were not in April 2013 and the more favourable weather). Some highlights were lawnmowers (up 60%) and barbeques (up 91%).

How Has the Automotive Sector Performed?



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



Favourable weather during parts of April helped the car cleaning product categories perform well. General cleaners and plastic/synthetic cleaners grew 14% and 10% respectively month on month. An absence of frosty starts meant that de-icer sales plummeted – sales value declined 85% compared to April last year.

For Further Insight and Enquiries:

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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
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