



# GfK Market-i

An Insight into June 2014 UK Retail Durable Sectors

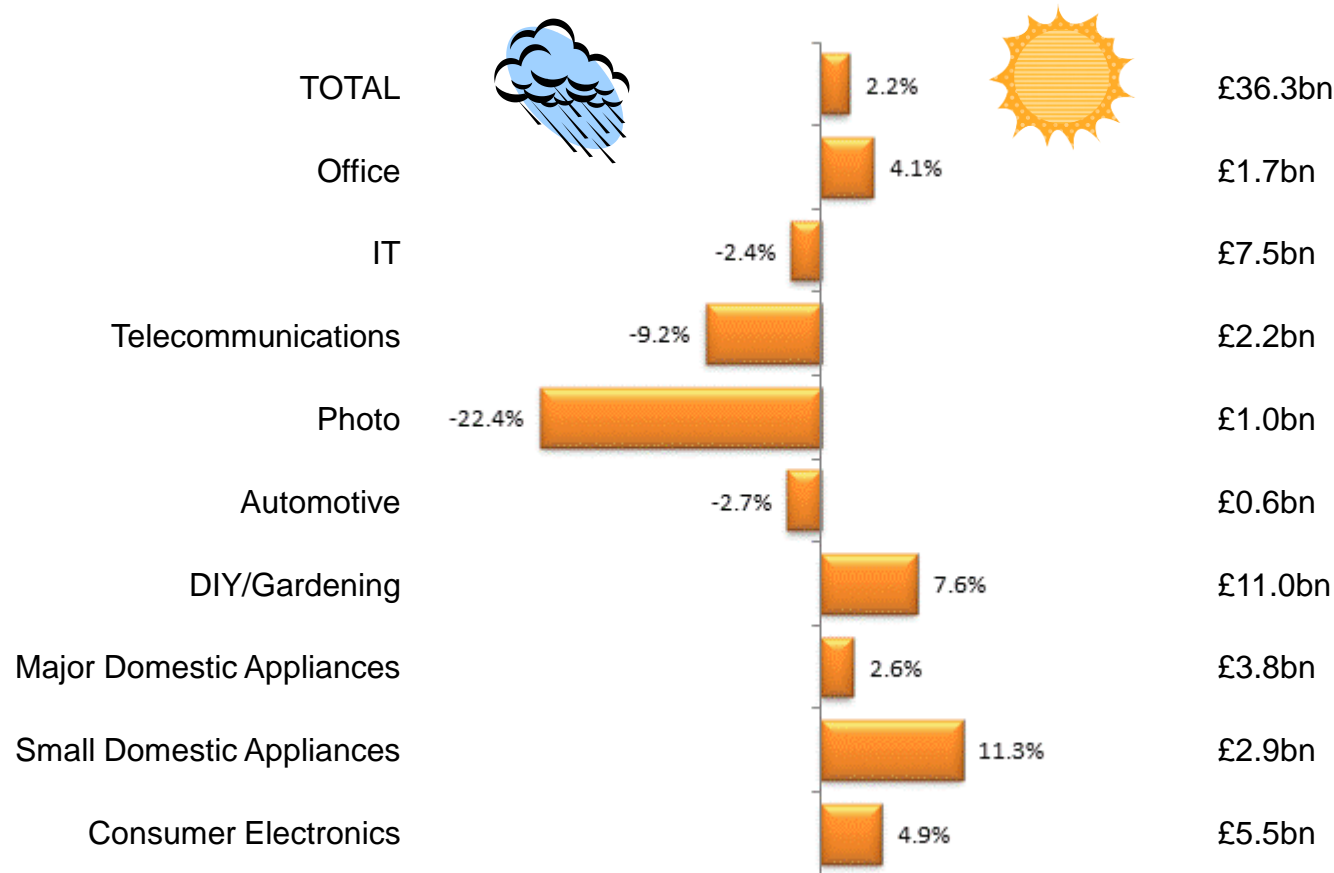
[www.gfk.com/uk](http://www.gfk.com/uk)

- In June 2014 the total durables market grew for the eighth consecutive month. Total market value grew 0.8% month on month compared to the same month last year.
- The “World Cup Effect” helped a remarkable growth of 15.6% in the consumer electronics market compared to June last year. This was mainly driven by large screen televisions, as Britons prepared to watch the World Cup, which started on the 12<sup>th</sup> of June. Related devices such as Sound Bars and Wall Mounts also benefitted from this uplift.
- The IT market declined 10% compared to June last year as it suffered from an exceptionally poor tablets sales performance.
- Online sales have now showed positive growth every month for the past 2 years. Growth however took a slight dip in June compared to previous months, as internet sales were up only 7.5% compared to the same month 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)

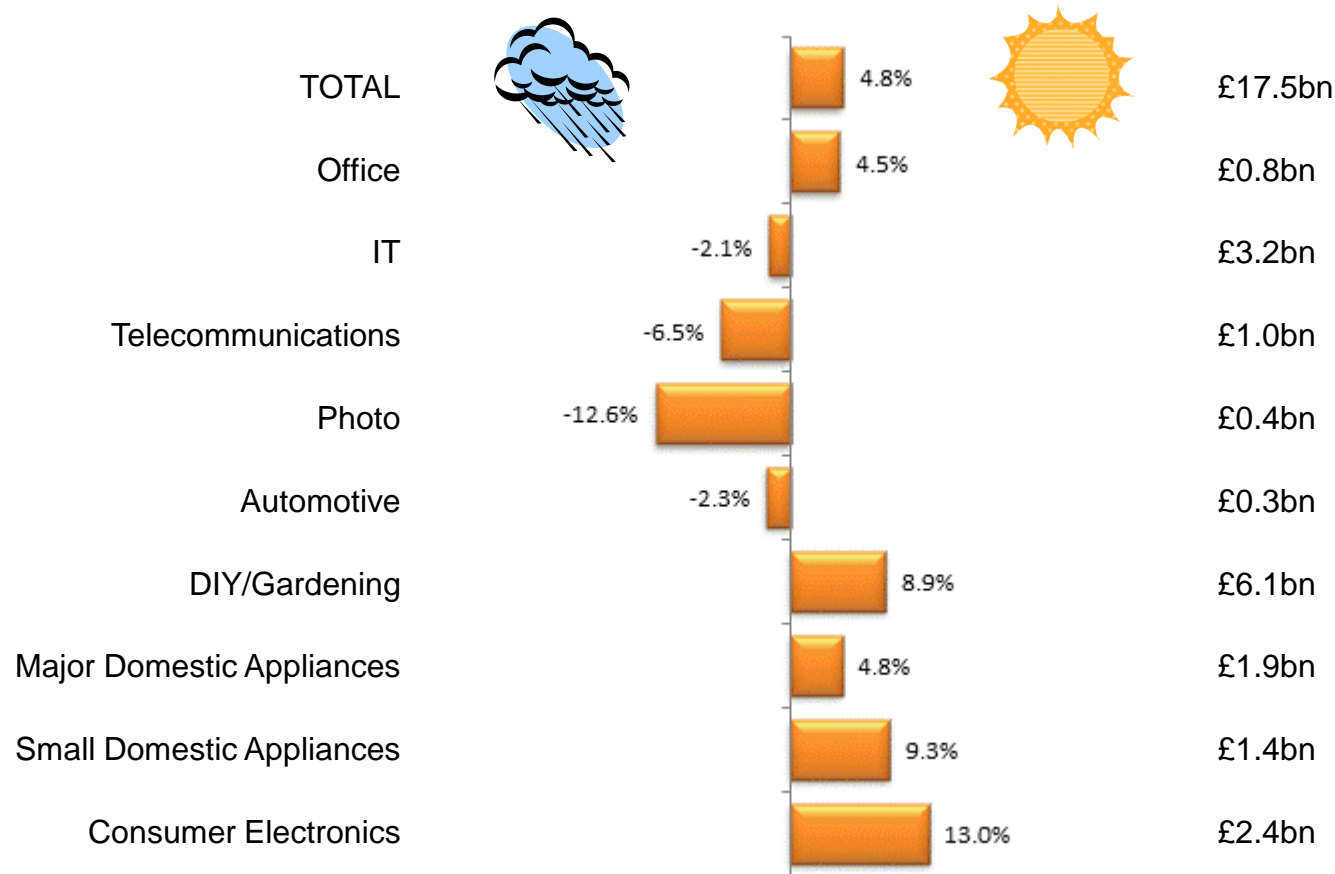
Market Value  
Jul13-Jun14



# 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)

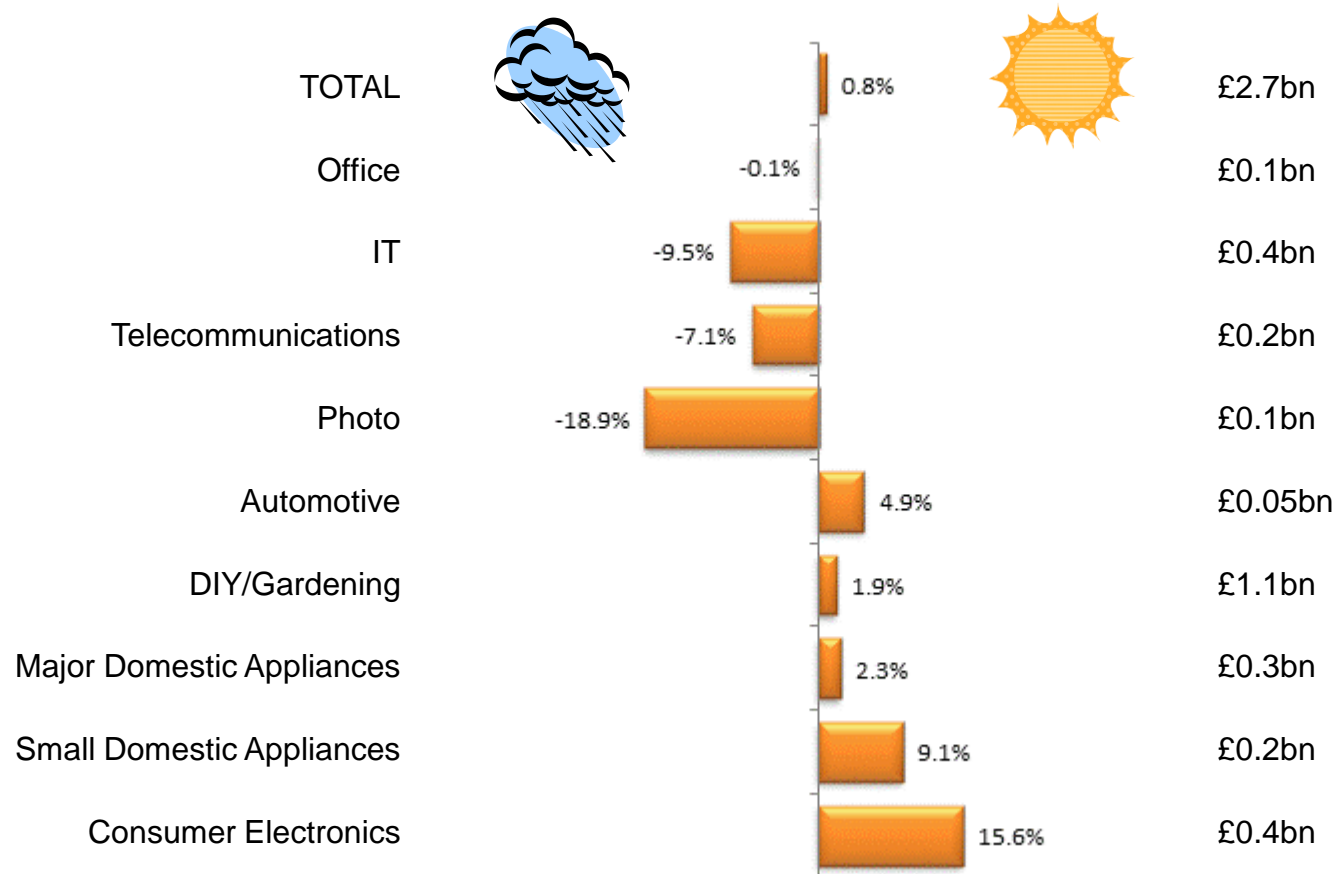
Market Value  
Jan14-Jun14



# Which Sectors Have Driven the Market Month on Month?

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

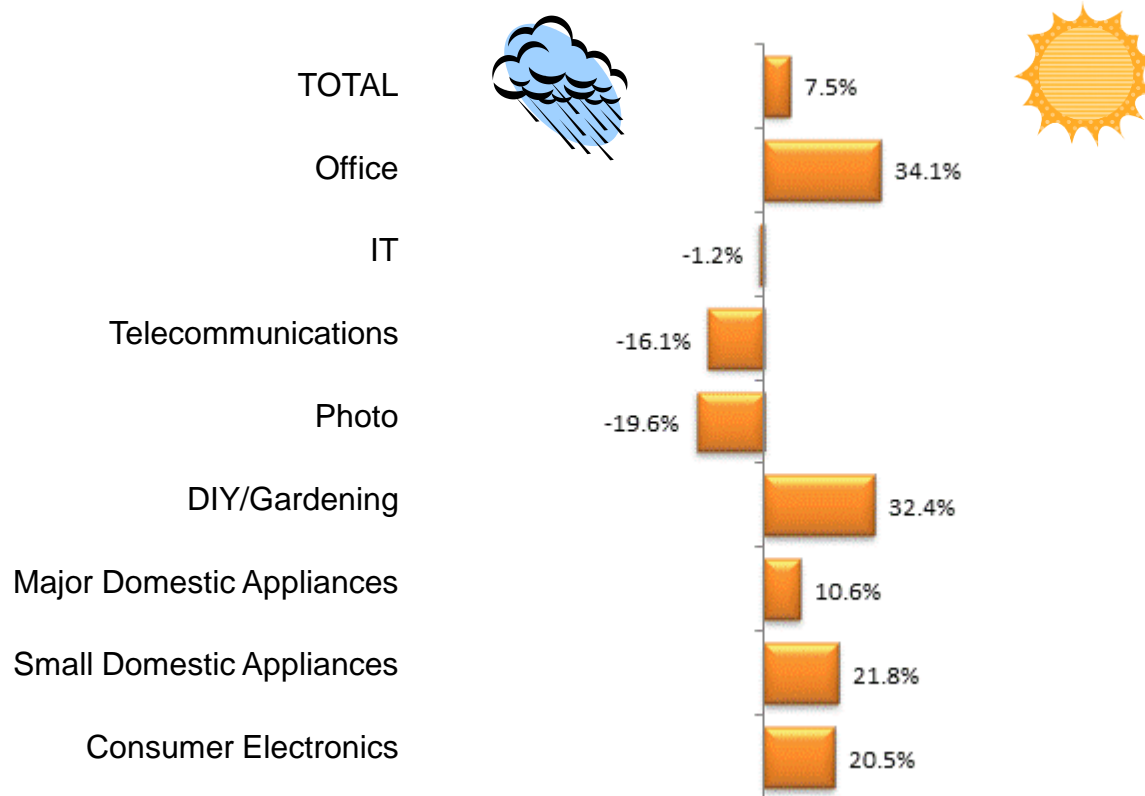
Market Value  
Jun14



# How are Online Sales Performing Month on Month?

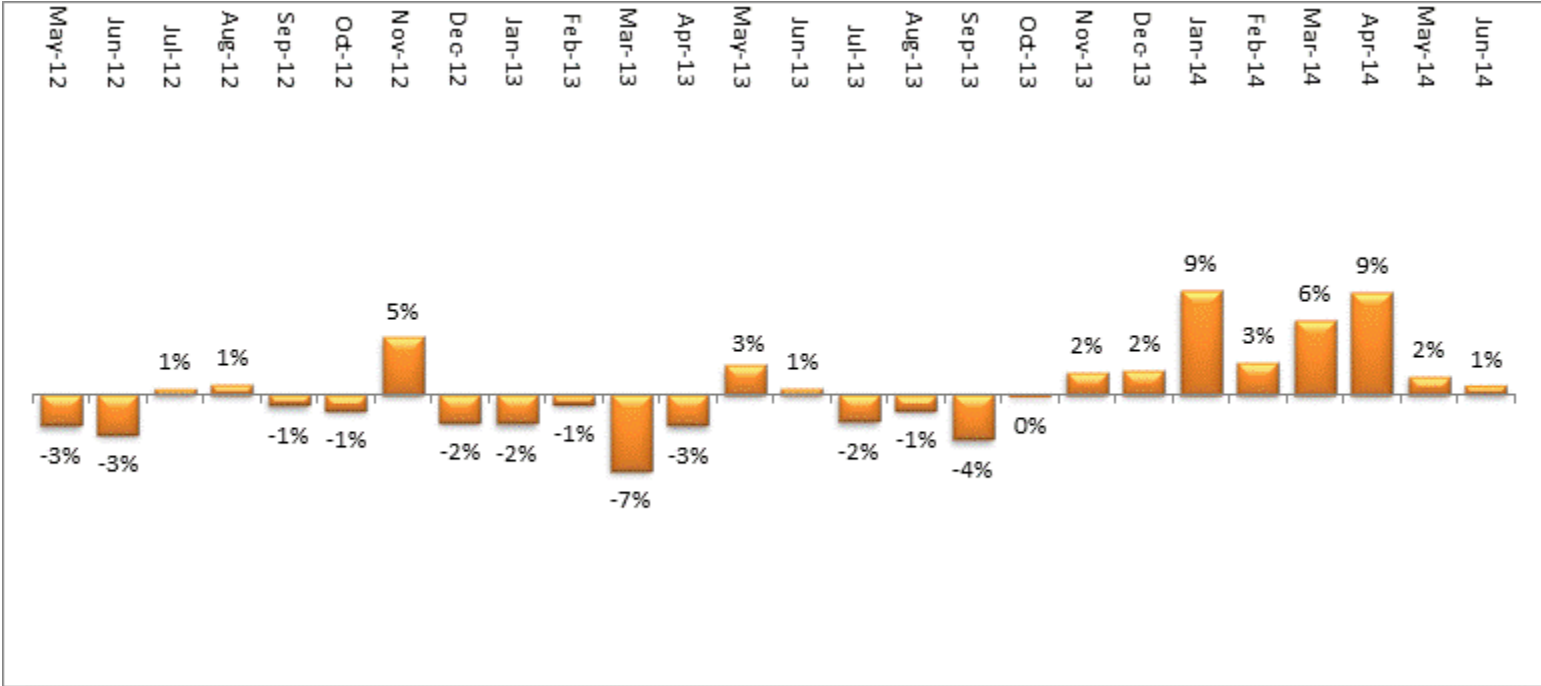


Month on Month % Growth in Online Sales  
(this month versus the same month last year)



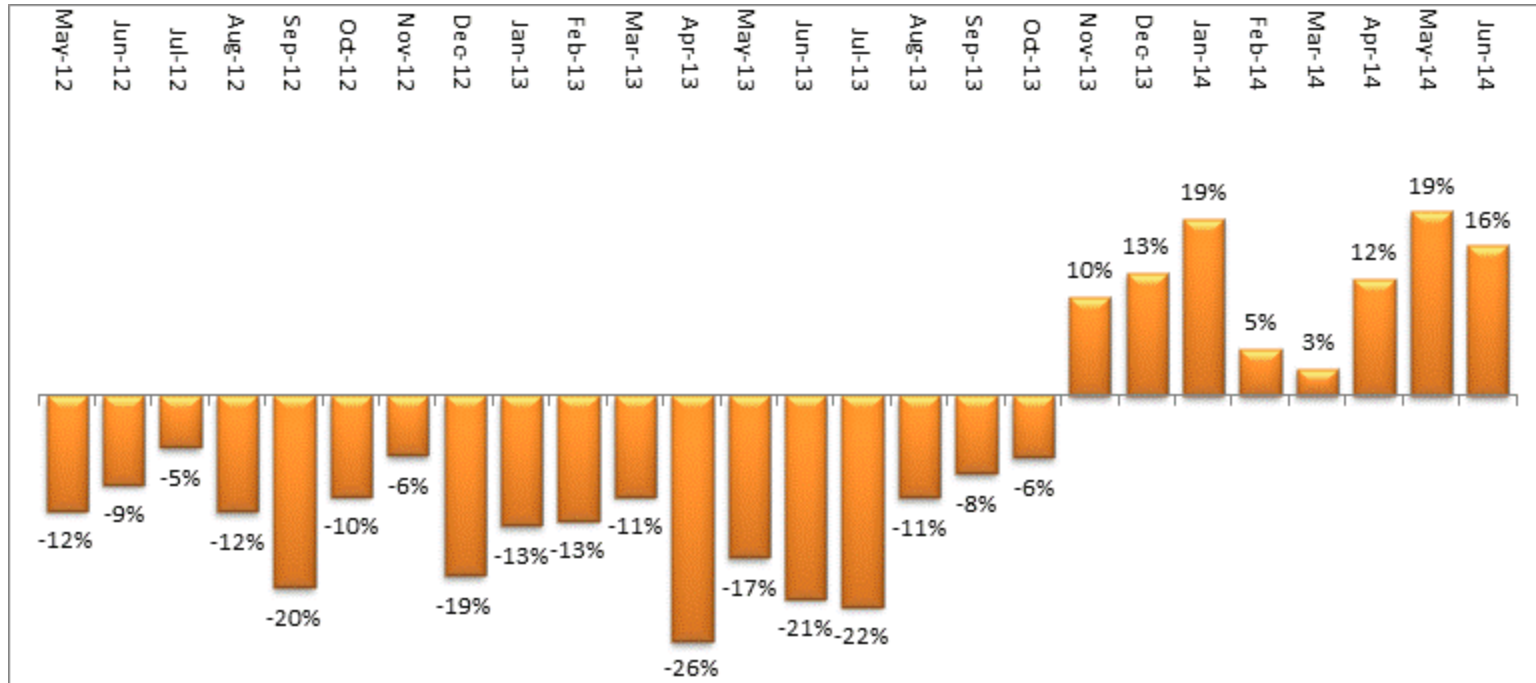
# How Has the Total Durables Market Performed?

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)



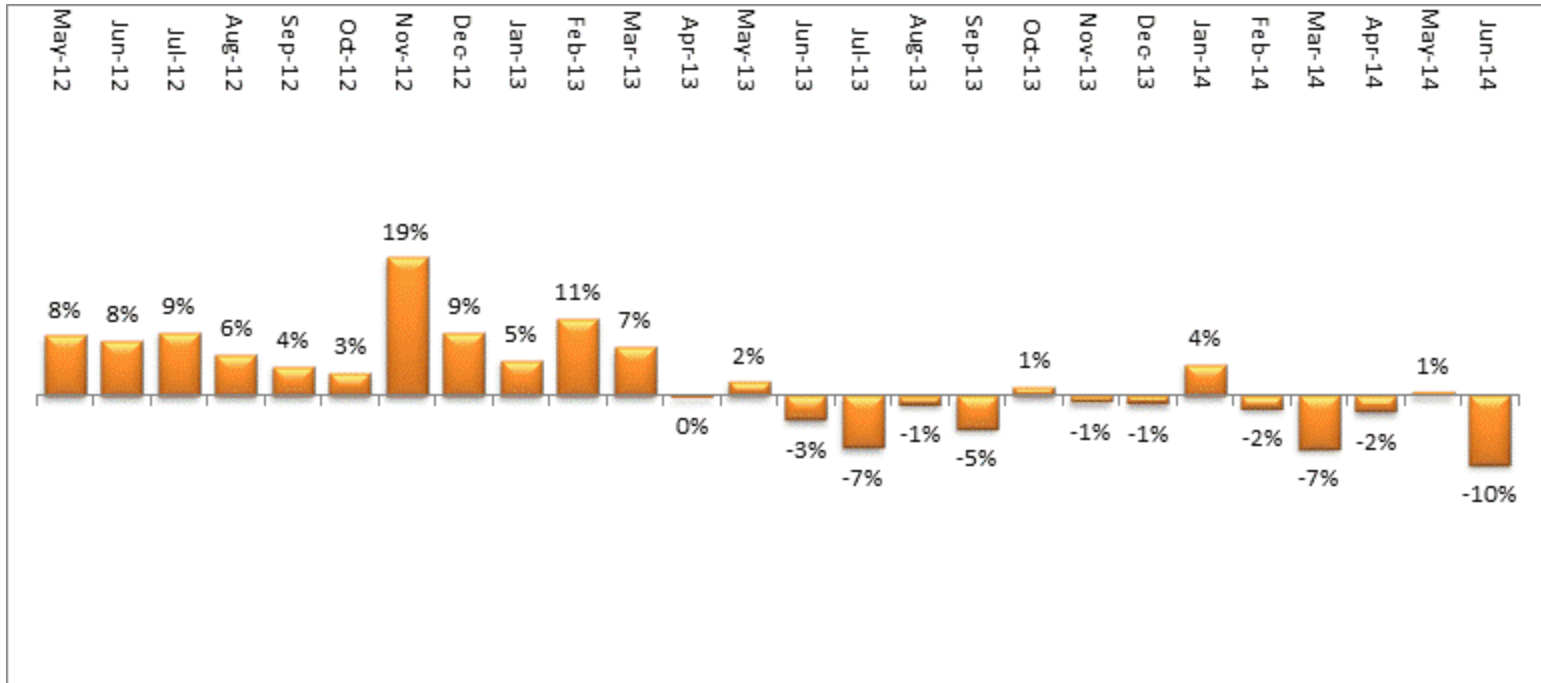
The launch of new Video Games Consoles in q4 2013 has helped to give a strong value uplift to the total CE market. More recently the main driver has been large screen TVs. A significant portion of the uplift has coincided with the lead up to the 2104 World Cup with around 170,000 more TV's being sold in May – June 2014 compared to the same period last year.

50"+ TVs have seen the biggest uplift and this will continue post World Cup. Related Devices such as Sound Bars and Wall Mounts are also benefitting.



# How Has the IT Sector Performed?

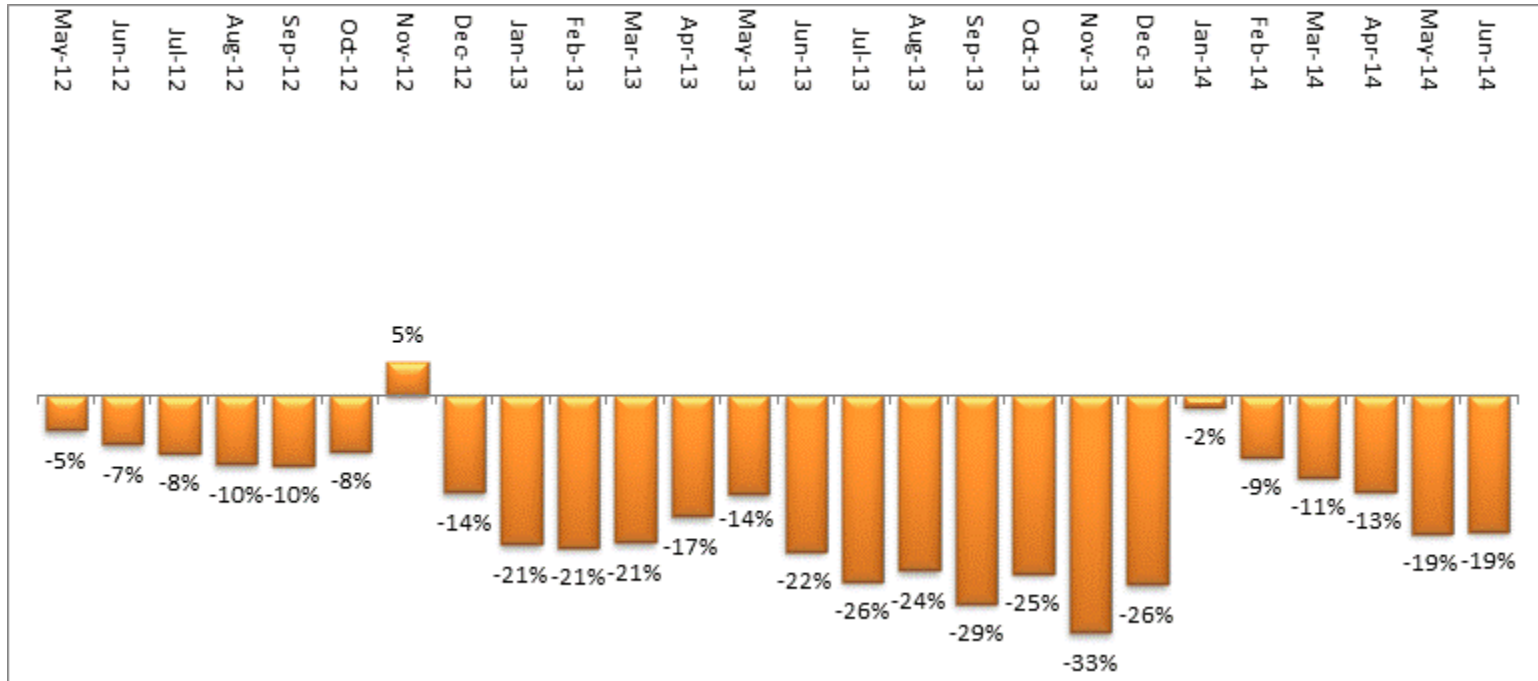
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



The IT market suffered from exceptionally poor tablets sales performance in June, down 26%. However, due to strong desktop computing, networking and storage growth the decline was tempered

# How Has the Photo Sector Performed?

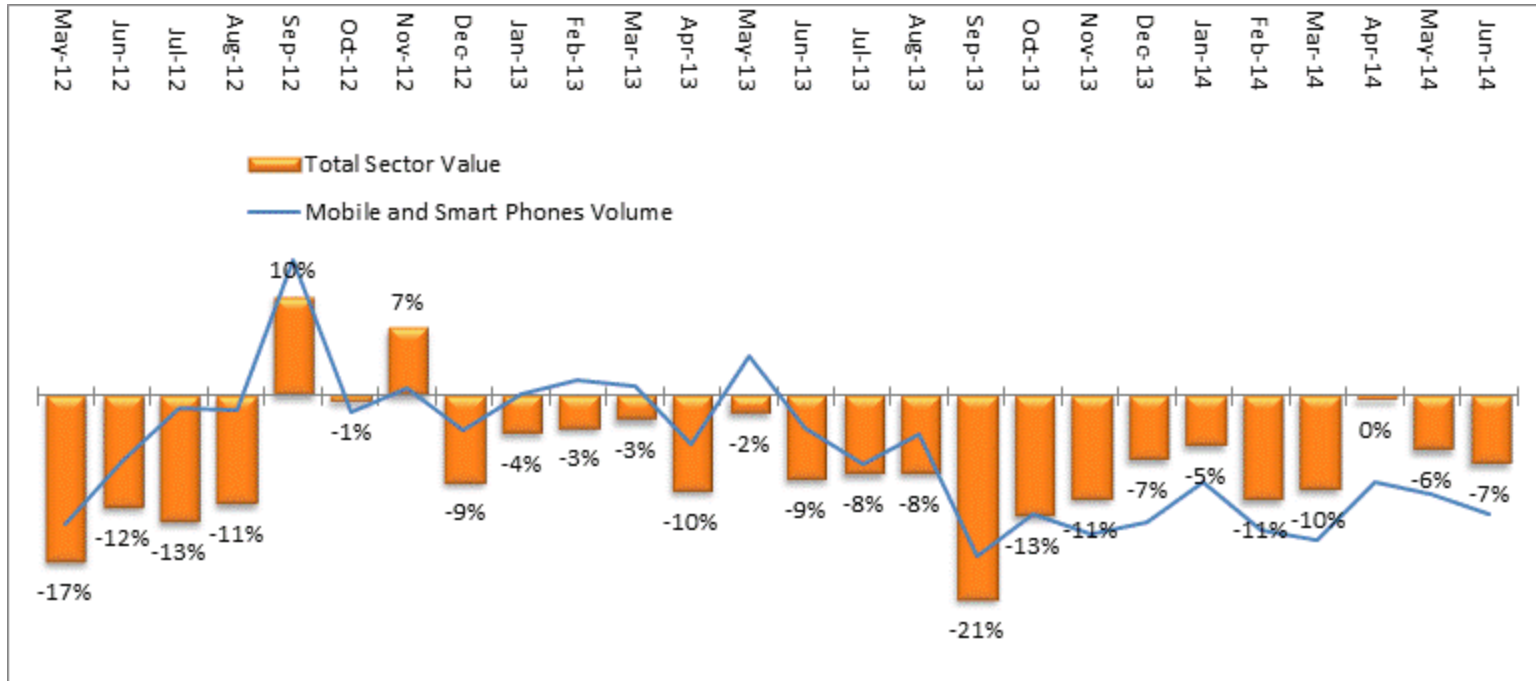
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



After an improvement at the beginning of 2014 due to a favourable comparison to a tough period in 2013, the photo market is settling at -19% in the last 2 months. Higher end cameras are still performing better than entry level ones. Furthermore Compact System Cameras is the growing category in value for the first 6 months.

# How Has the Telecommunications Sector Performed?

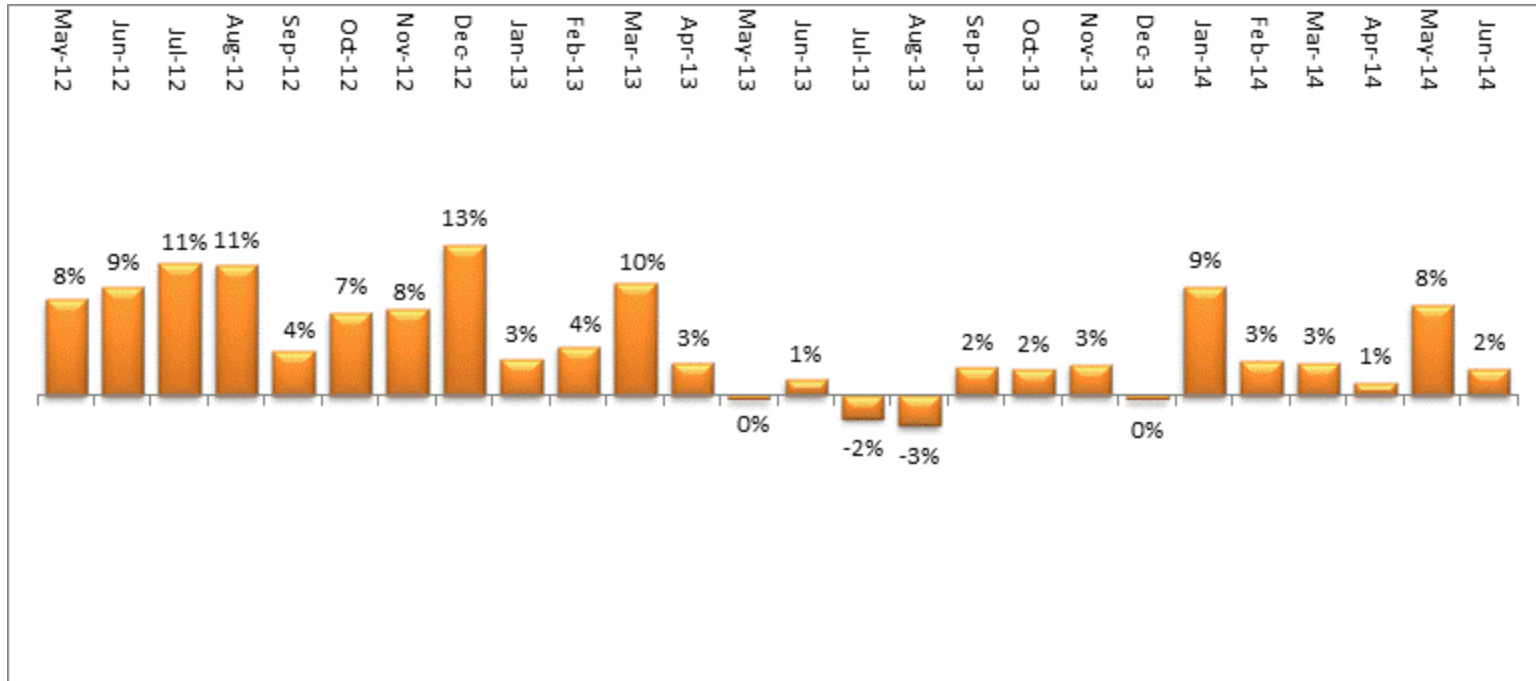
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



The prepaid market has posted significant declines year on year, with sales units falling by over 20% in the first 5 months of 2014 when compared with the same period in 2013. This follows a decline of over 15% when comparing this period between 2012 and 2013, and just under a 40% decline for 2011 into 2012.

# How Has the Major Domestic Appliances Sector Performed?

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

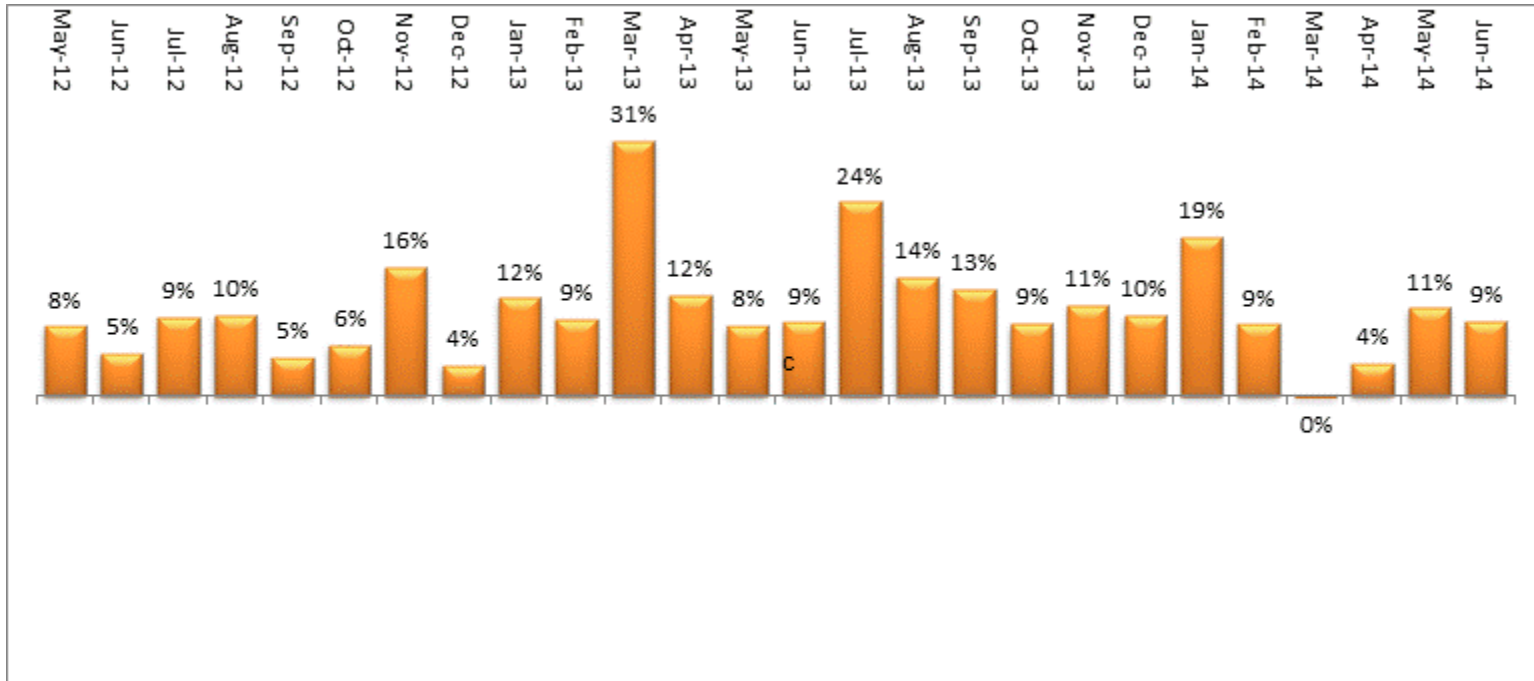


The major domestic appliances took a slight dip in June compared to the strong growth in May which was driven by bank holiday weekend promotions. Growth is still positive and largely down to the cooling and freezer markets which are up 11% and 9% respectively on last year.

# How Has the Small Domestic Appliances Sector Performed?



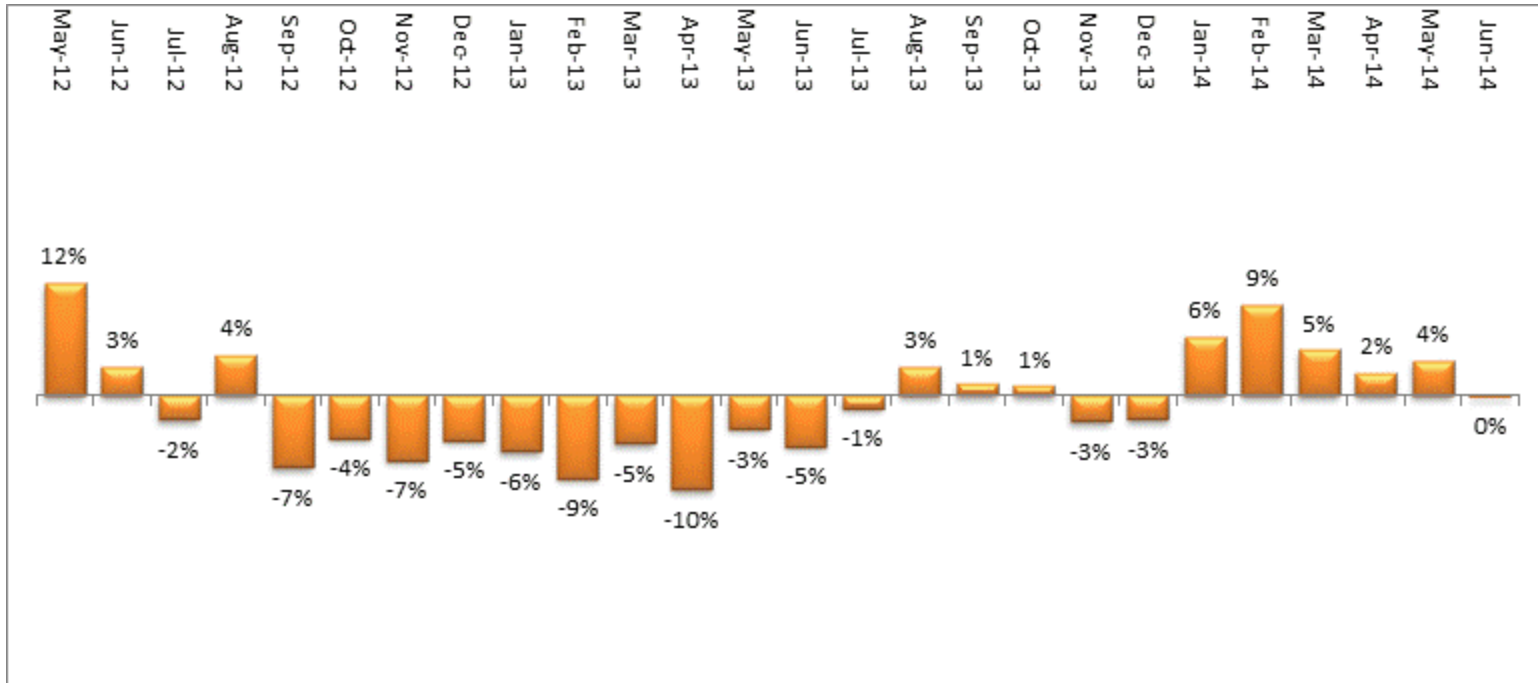
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



Seasonal products have had a large role in driving value growth in the small domestic appliances sector given the warm weather in June, both electric fans and air conditioning seeing triple digit growth. Food preparation has also performed strongly, juicers and liquidisers reporting 121% and 87% value growth respectively from last year.

# How Has the Office Sector Performed?

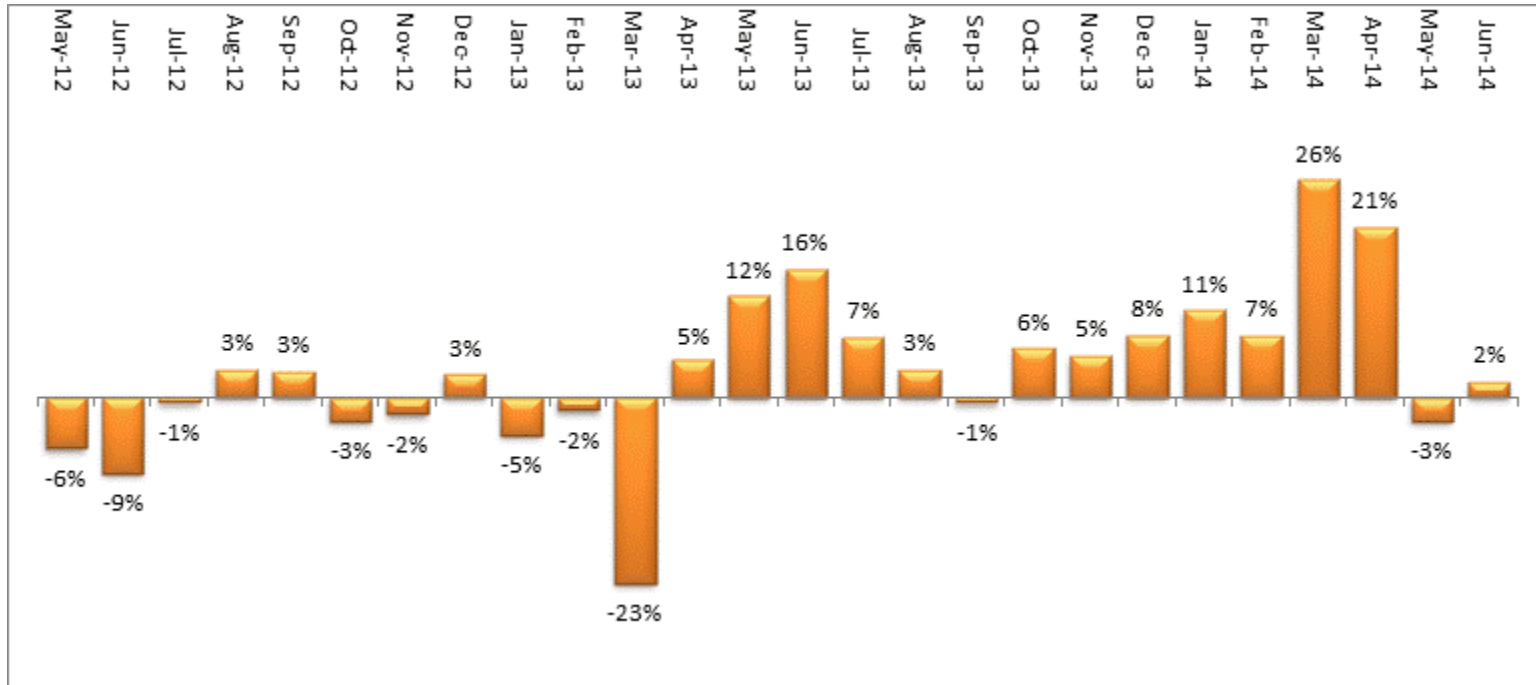
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



There were mixed results in the stationery segment – ball point pens grew 13% compared to June last year whilst office paper and inkjet cartridges declined 7% and 3% respectively month on month.

# How Has the DIY/Gardening Sector Performed?

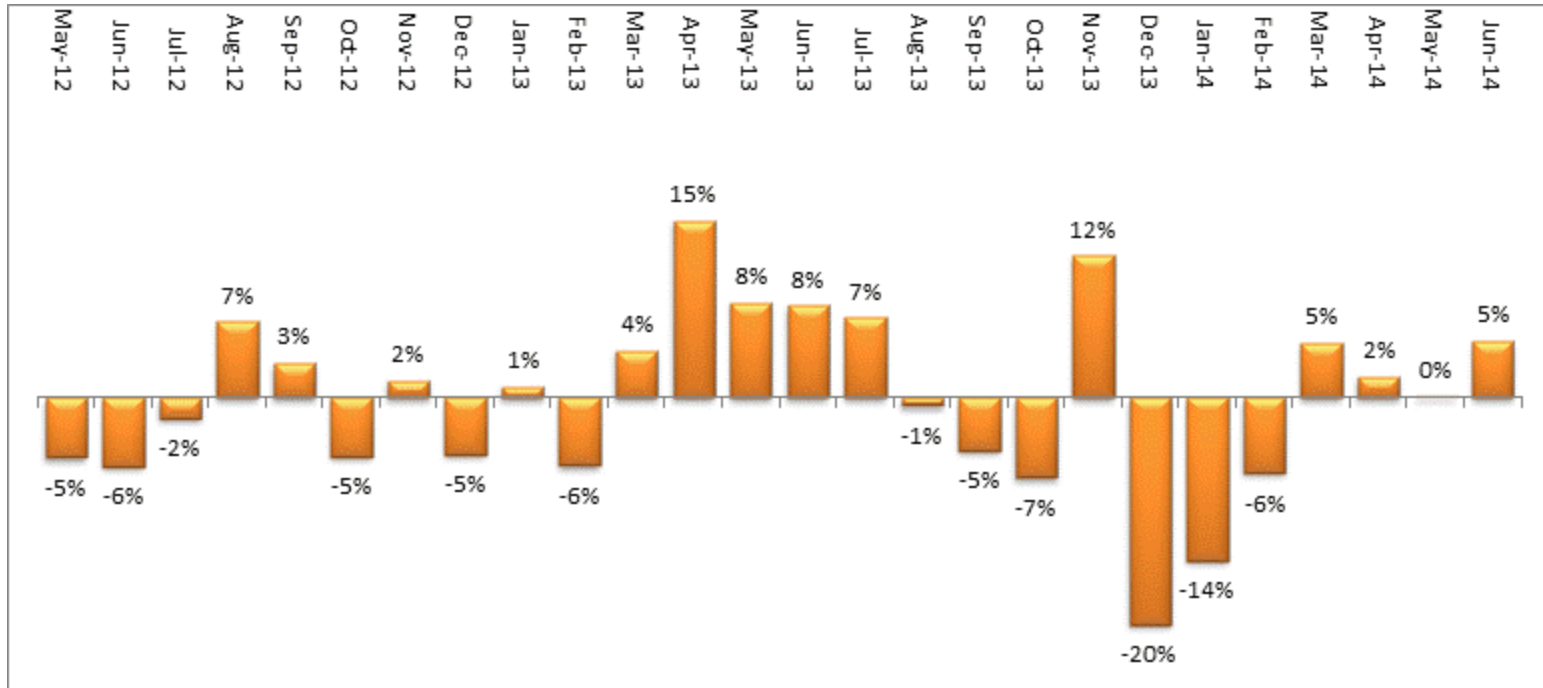
Month on Month % Growth in Sector Value  
(this month versus the same month last year)



June saw the value attributable to emulsion paint decline 4% compared to the same month last year. The warm weather helped barbeques fare better, where value growth was 13% month on month.

# How Has the Automotive Sector Performed?

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



Good weather with lower rainfall compared to 2013 continues to drive both value and volume growth in both the paint care and specialist cleaners areas.

Value growth in engine oils was due to price increases over last year.



# For Further Insight and Enquiries:

Natasha Fernando | [natasha.fernando@gfk.com](mailto:natasha.fernando@gfk.com) | 020 7890 9822

© 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

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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
- 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