



# GfK Market-i

An Insight into October 2014 UK Retail Durable Sectors

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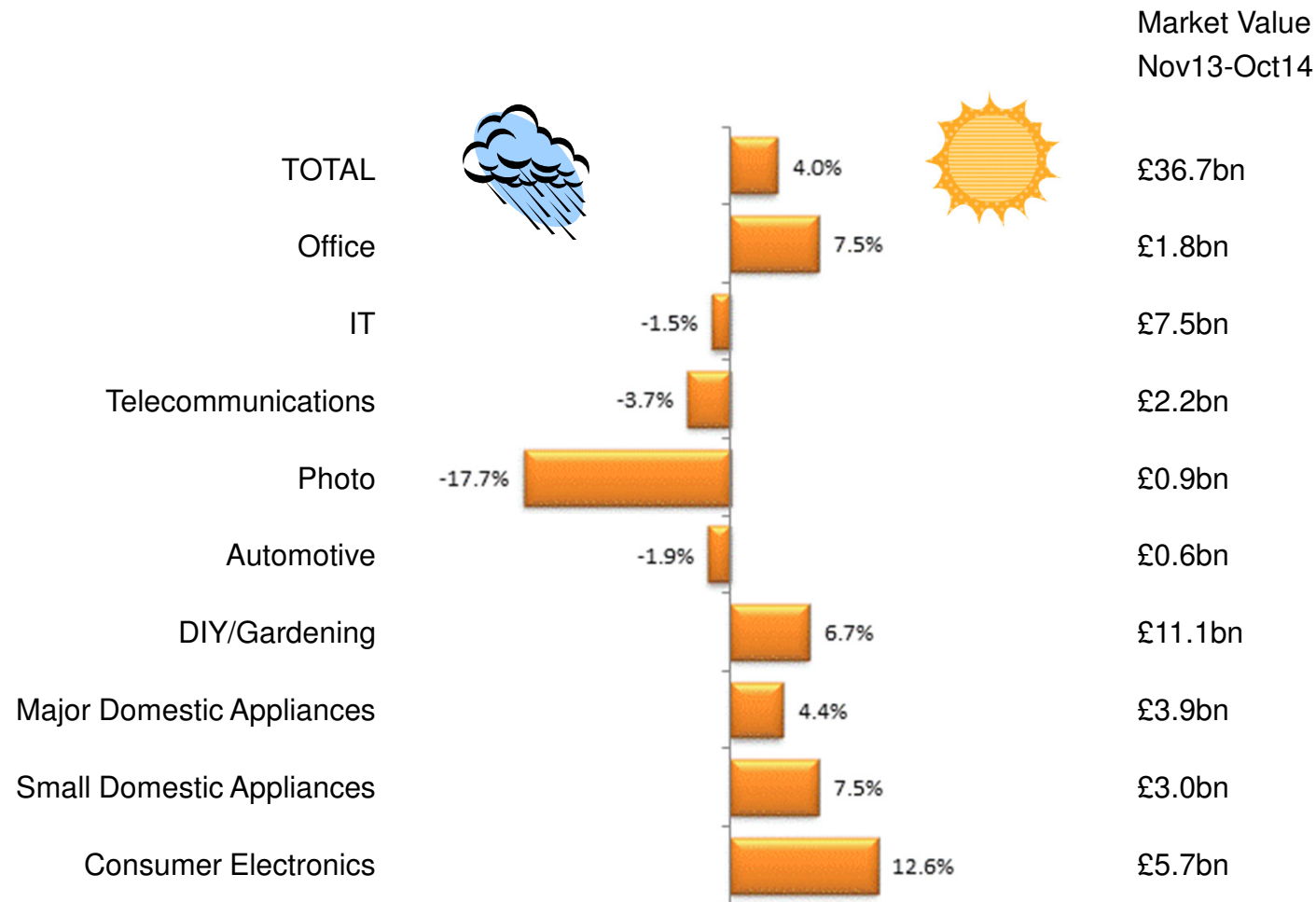
- The total durables market grew month on month for the twelfth consecutive period. October 2014 saw total market value grow 3.2% compared to the same month last year.
- The importance of innovation is shown by both the consumer electronics and telecommunications sectors where new launches have helped drive value growth of 11% and 8.2% respectively compared to October last year.
- Year to date, total market growth is running at 4.3%. Even if performance is flat over the final two months of the year, the market stands in good stead to achieve a solid growth for 2014 as a whole.
- The online distribution channel continues to gain share at the expense of traditional retail channels, with 21% of total market sales value occurring online (up from 19% in October 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)

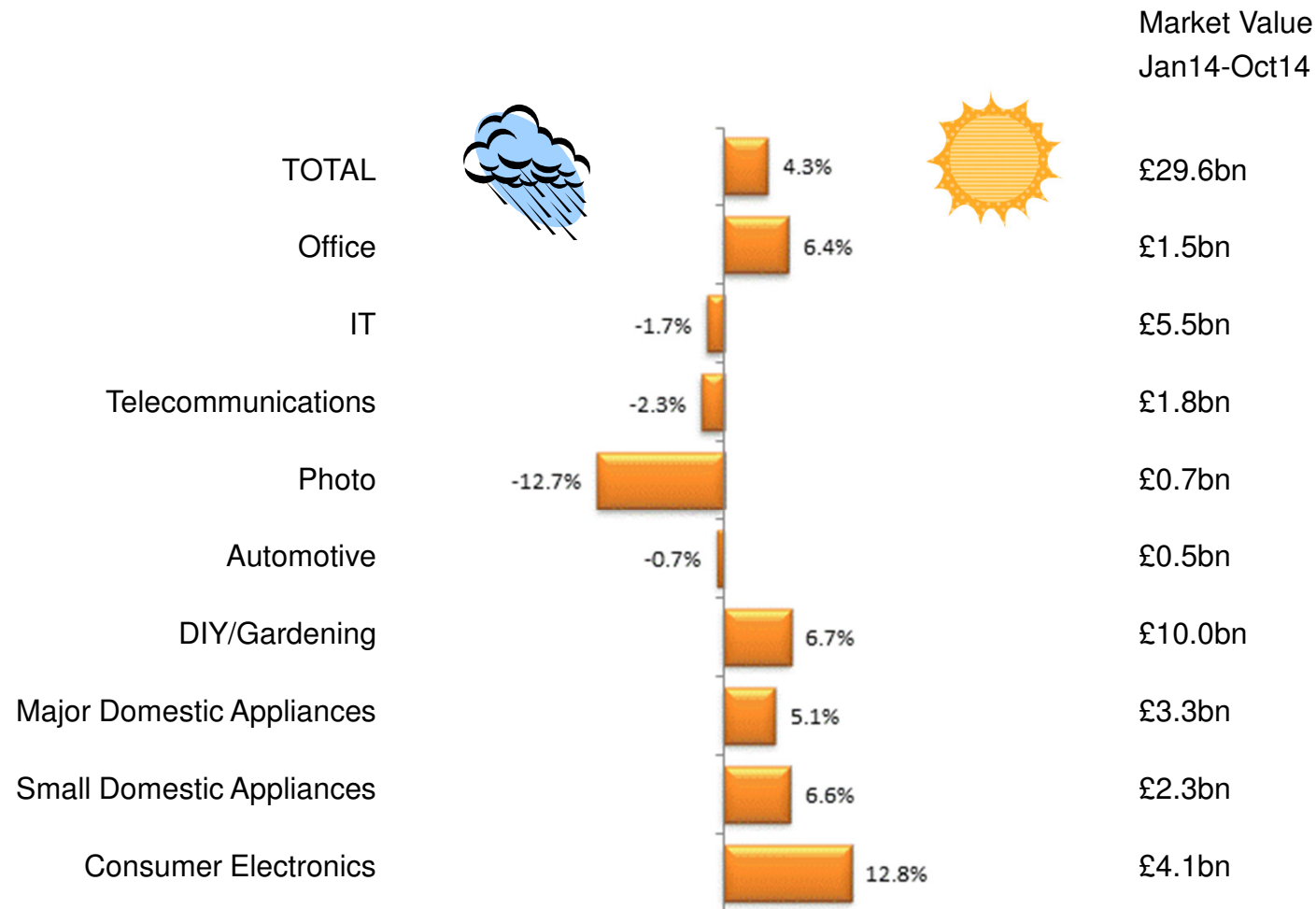


# Which Sectors Have Driven the Market Year to Date?



Year to Date % Growth in Value

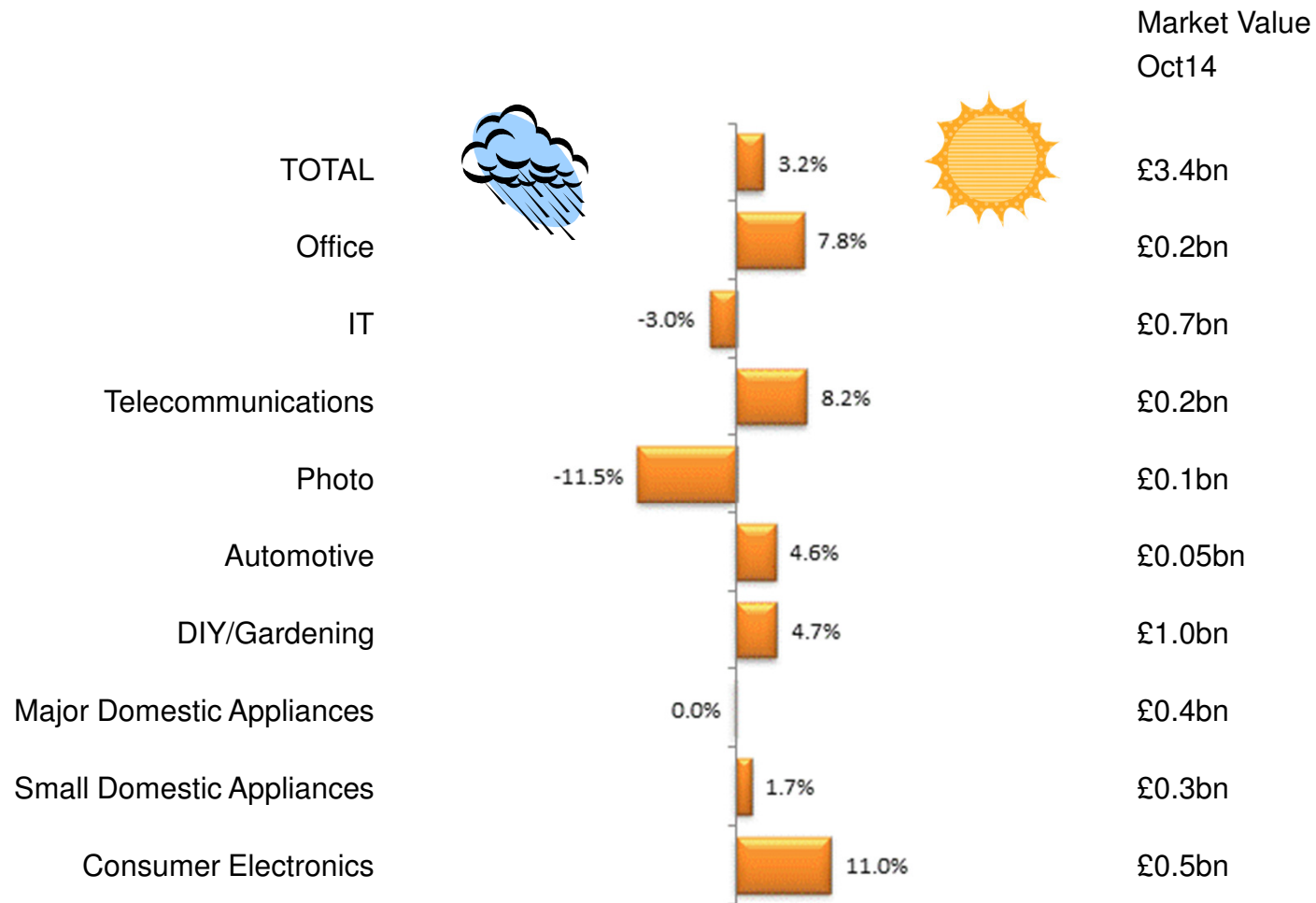
(value so far this year versus the same period last year)



# Which Sectors Have Driven the Market Month on Month?



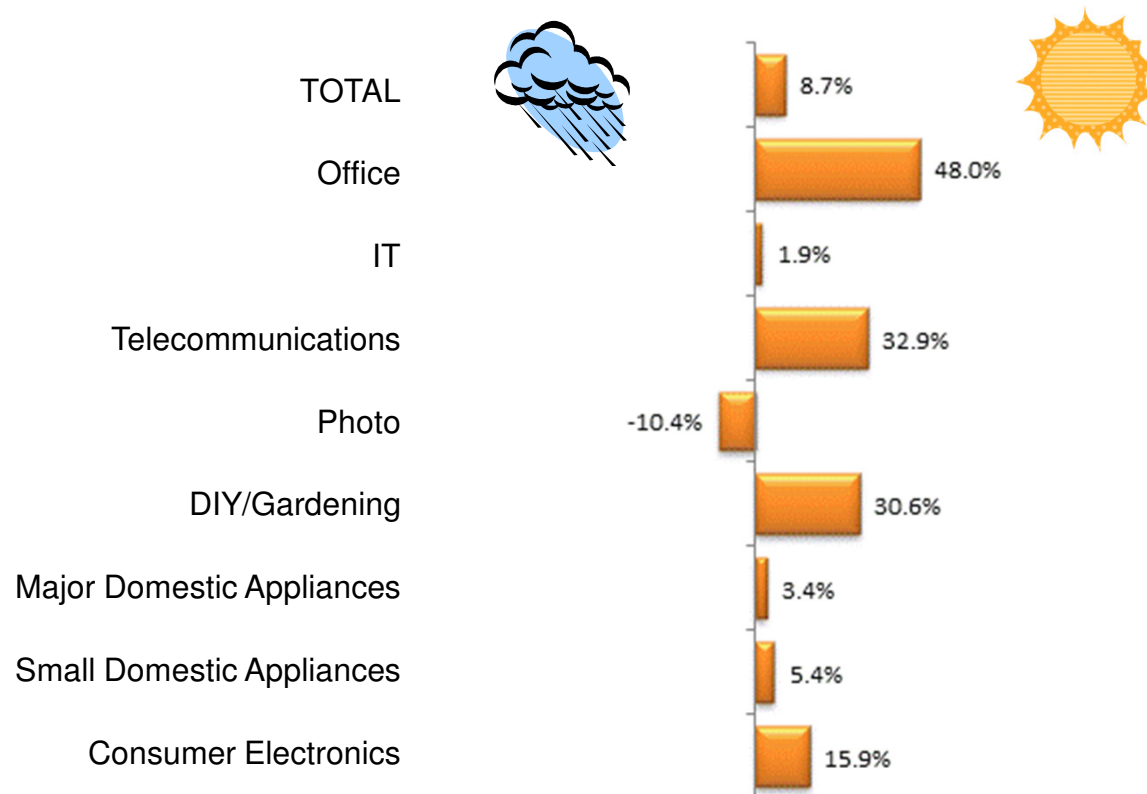
Month on Month % Growth in Value  
(this month versus the same month last year)



# How are Online Sales Performing Month on Month?



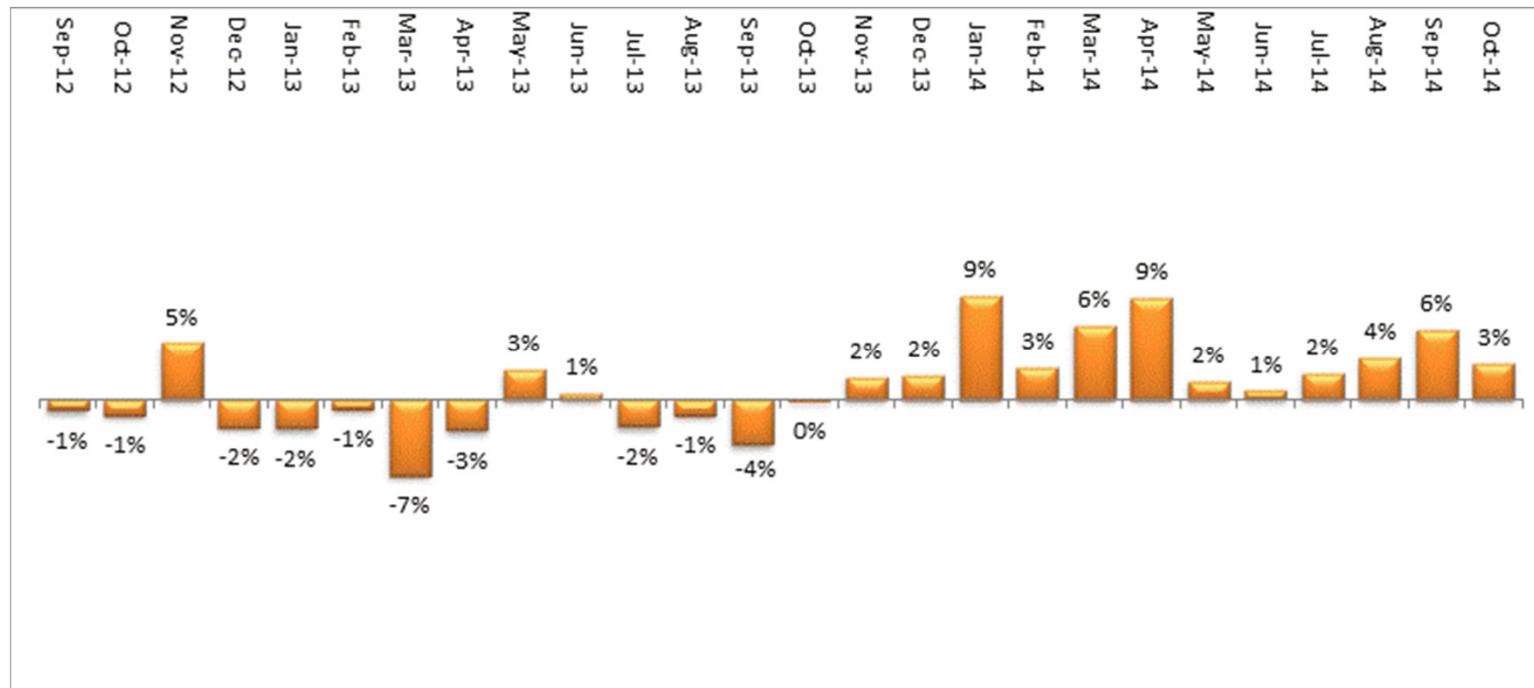
Month on Month % Growth in Online Sales  
(this month versus the same month last year)



# How Has the Total Durables Market Performed?



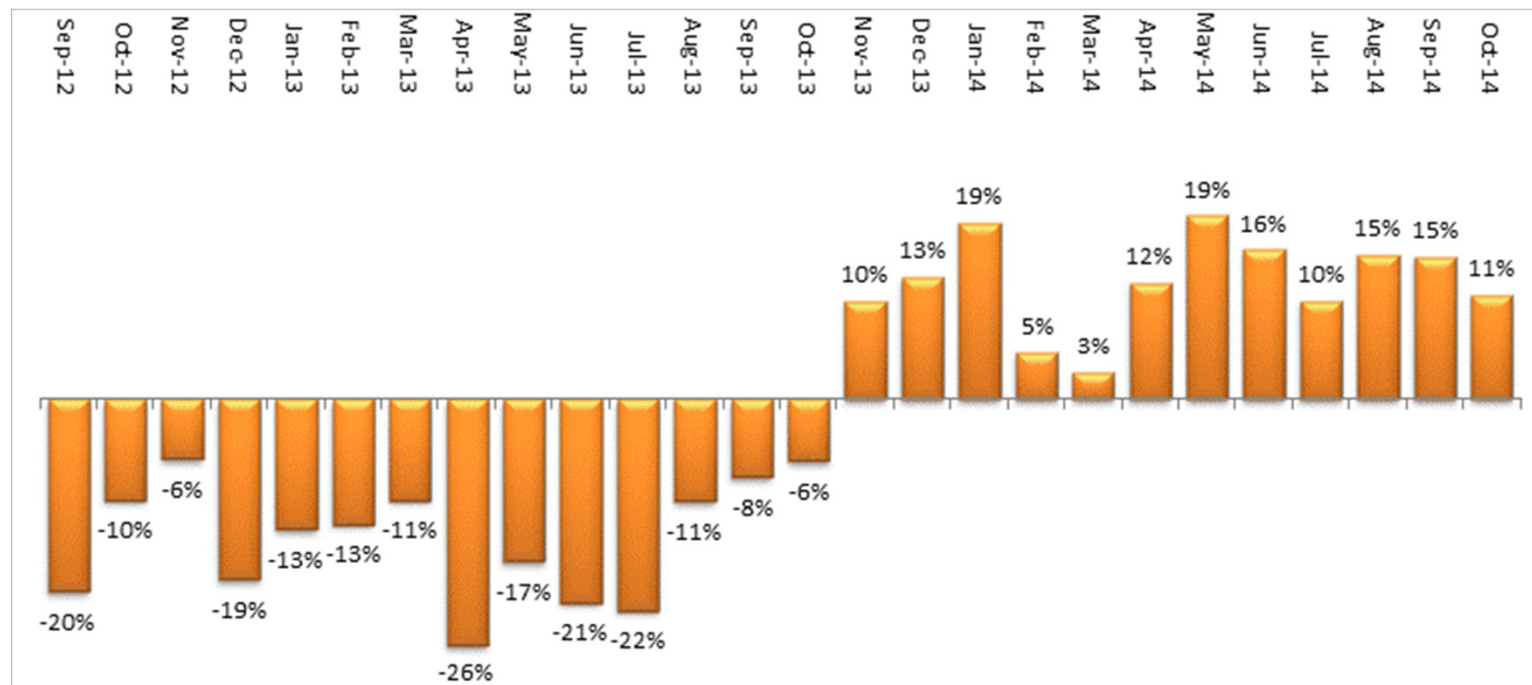
Month on Month % Growth in Total Market Value  
(this month versus the same month last year)



# How Has the Consumer Electronics Sector Performed?



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

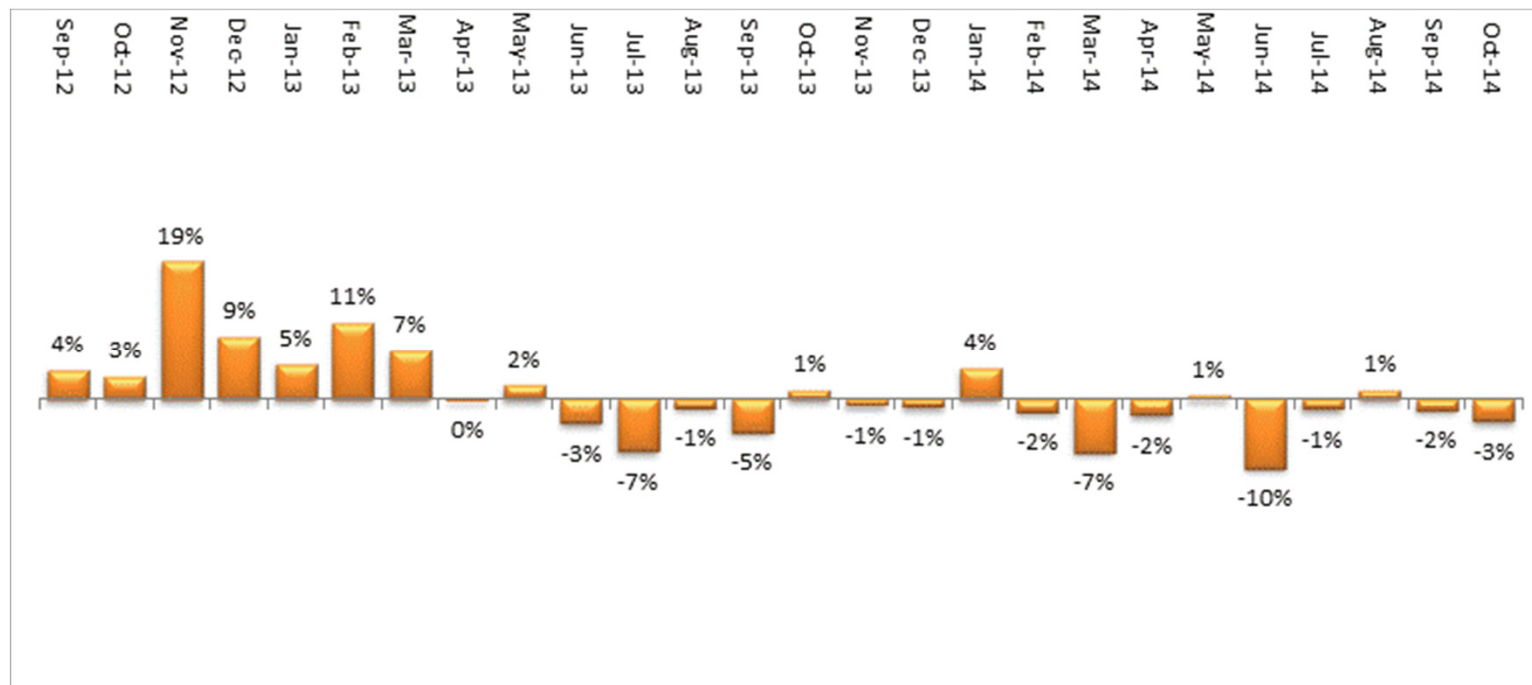


The video games console success story continues, boosting the consumer electronics sector into growth. Removing the effect of this product category, the month on month result is actually a decline of 4%, with televisions down 1%.

# How Has the IT Sector Performed?



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

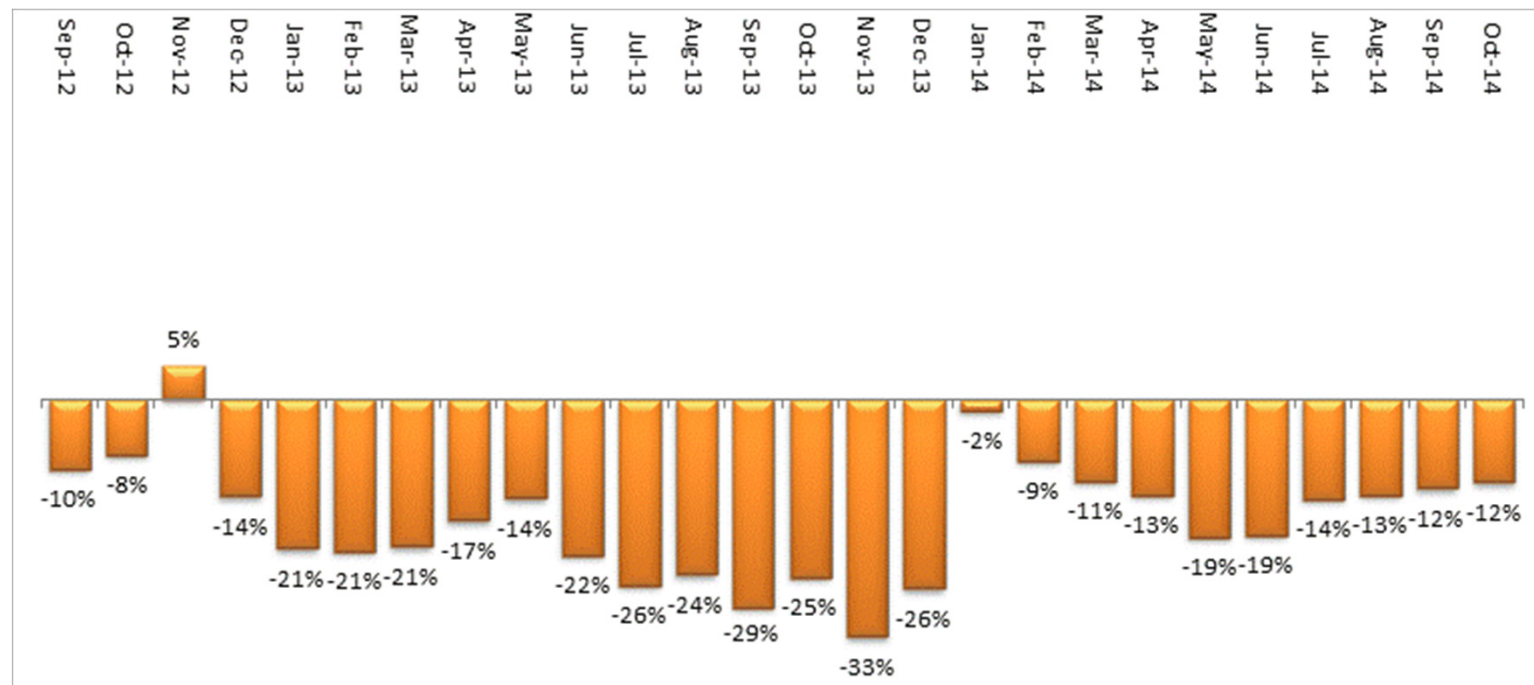


All areas of the IT sector were in growth in October except for media tablets. These declined 28% in value which dragged the entire market into slight decline despite a great month for all other areas.

# How Has the Photo Sector Performed?



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

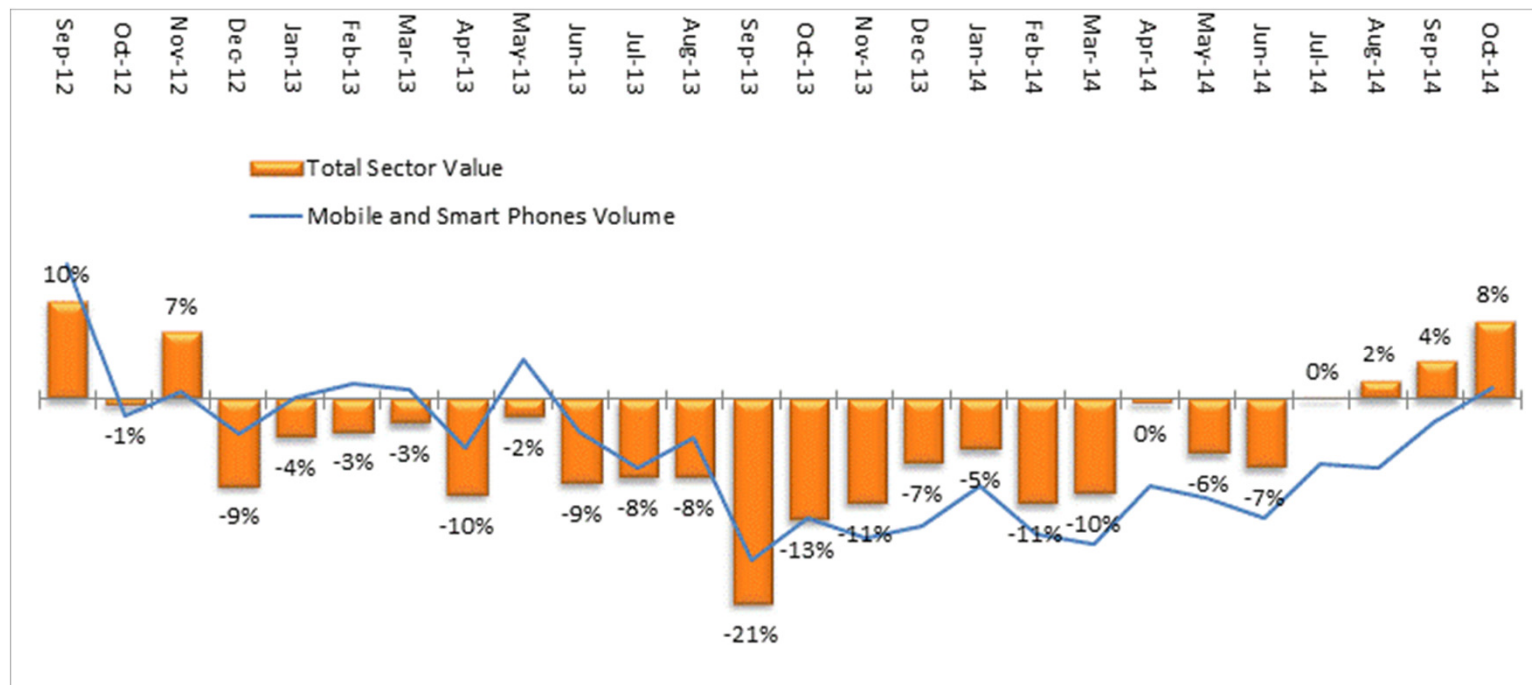


As usual, standard point and shoot cameras, the sales of which are cannibalized by smart phones, are dragging down the photo sector's performance. Nevertheless, the value decline has plateaued in recent months. Looking ahead we would expect the trend to continue in the last remaining months of 2014.

# How Has the Telecommunications Sector Performed?



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

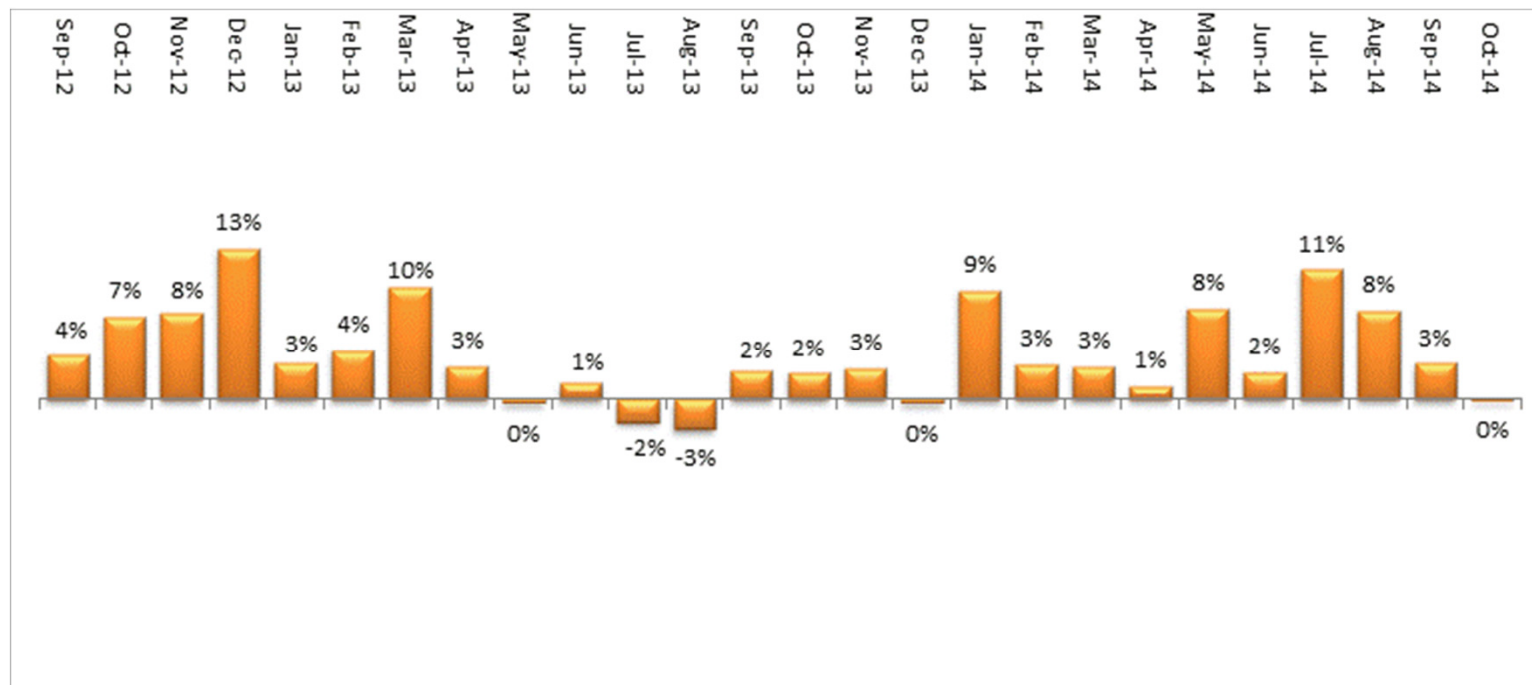


New launches help drive the first volume increase in mobile and smart phones since May 2013. This helps drive value for the product category, which grows 15% month on month. There is associated demand for enhancements, which grow 12% compared to October last year.

# How Has the Major Domestic Appliances Sector Performed?



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

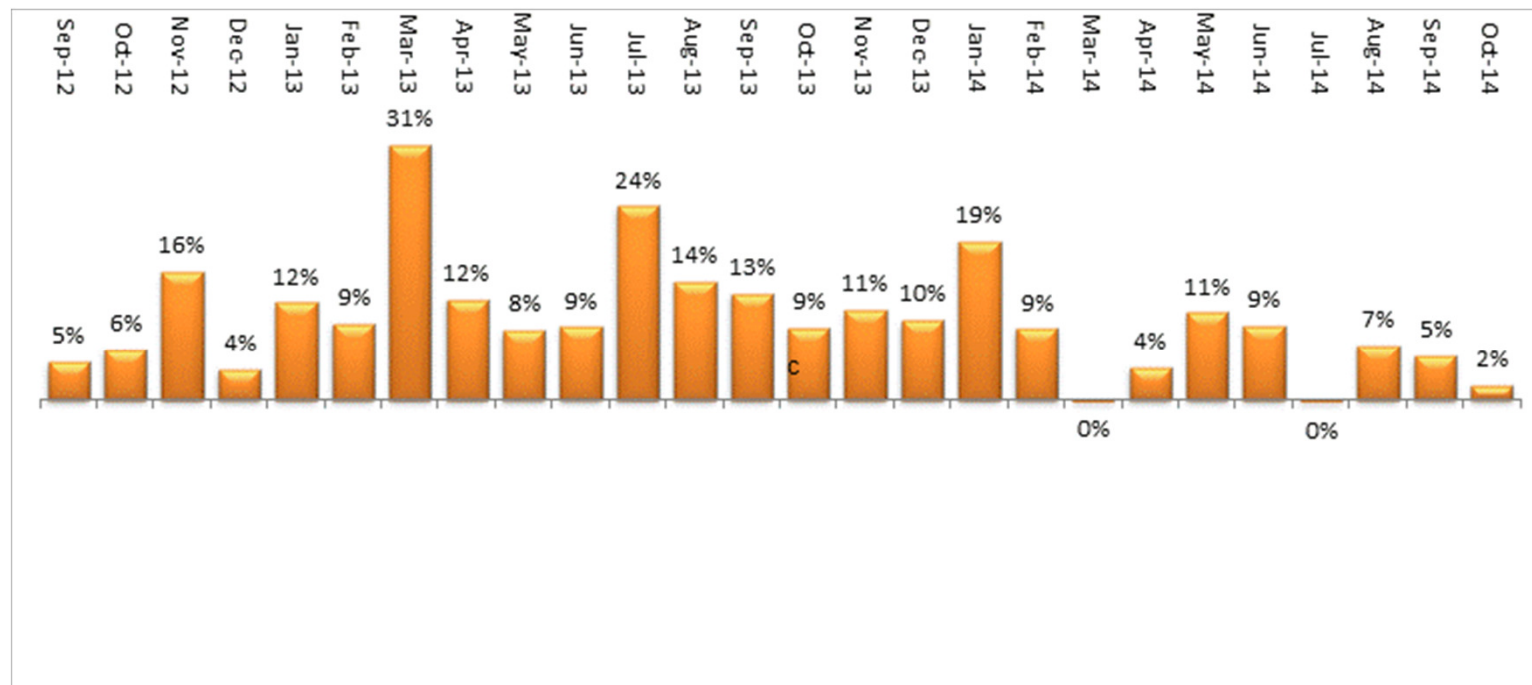


Whilst the major domestic appliances sector is flat on last year, the refrigeration market has enjoyed a solid performance, helping to stabilise the overall market. Sales of cooling rose by 6% in October. This growth was offset by a decline of 8% for washing machines.

# How Has the Small Domestic Appliances Sector Performed?



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

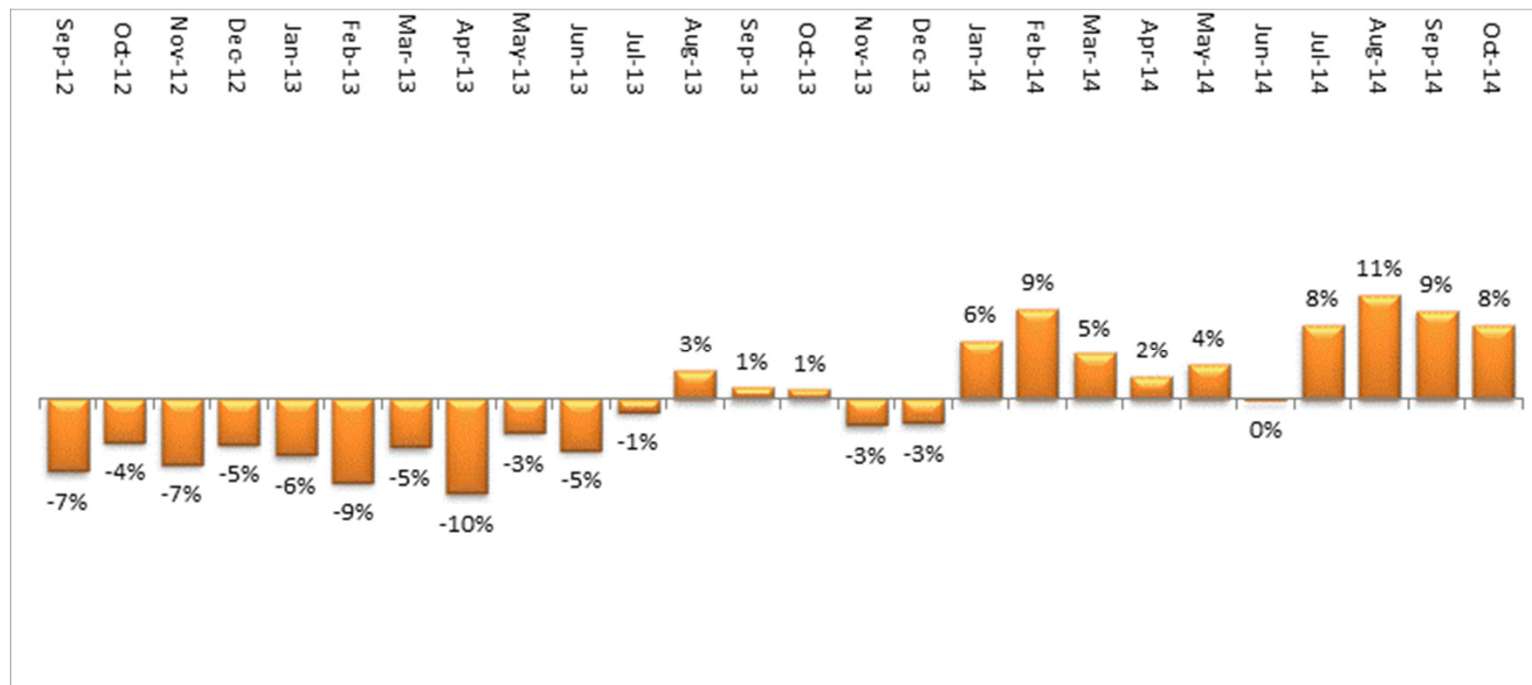


October 2014 saw a slowdown on last year with areas like deep fryers, well being and juicers failing to meet the strong anniversary sales of 2013. Overall market value growth is being driven by the popular kitchen gadgets (food preparation, electric cooking pots and hot beverage makers) as we quickly approach the peak Christmas shopping season.

# How Has the Office Sector Performed?



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

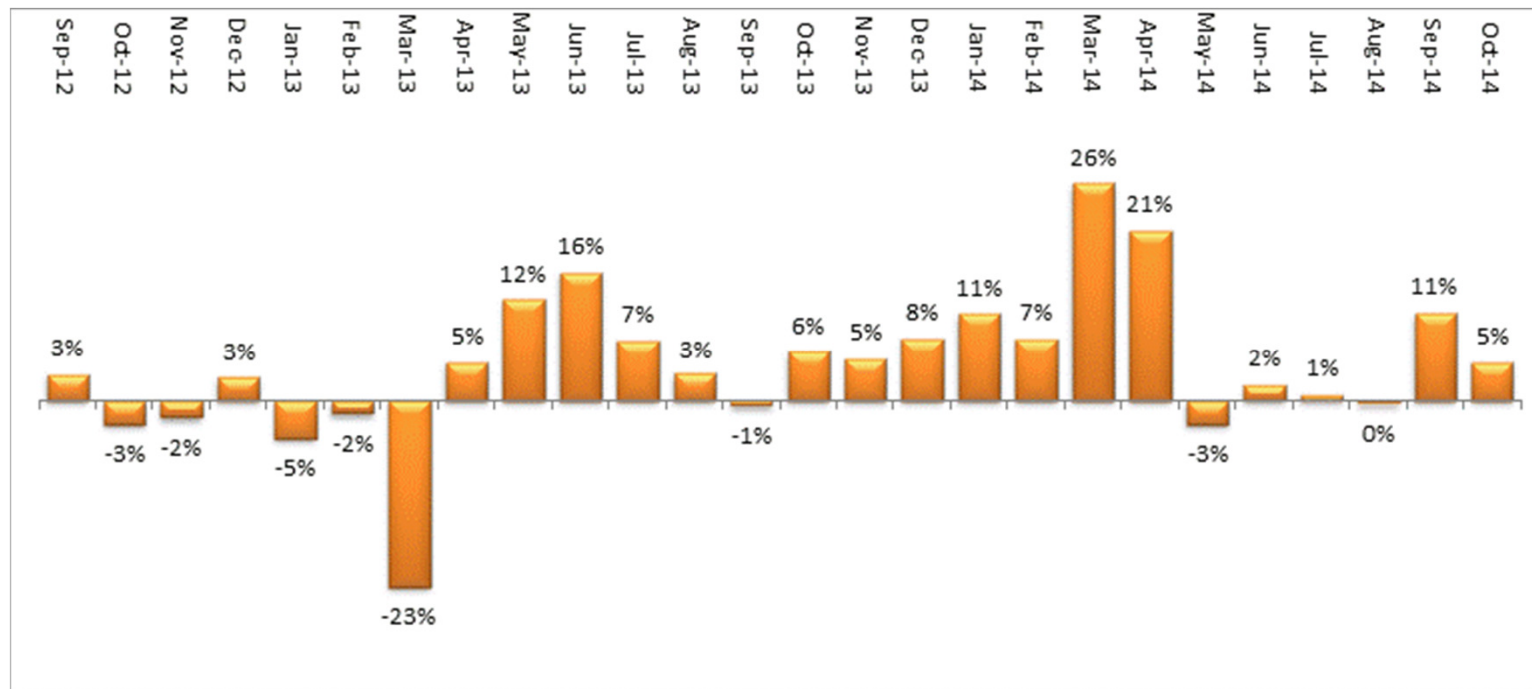


The key inkjet cartridges product category helps drive growth in the office sector, up 8% compared to October last year. In the stationery segment, roller balls and office paper grow 4% and 2% respectively month on month.

# How Has the DIY/Gardening Sector Performed?



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

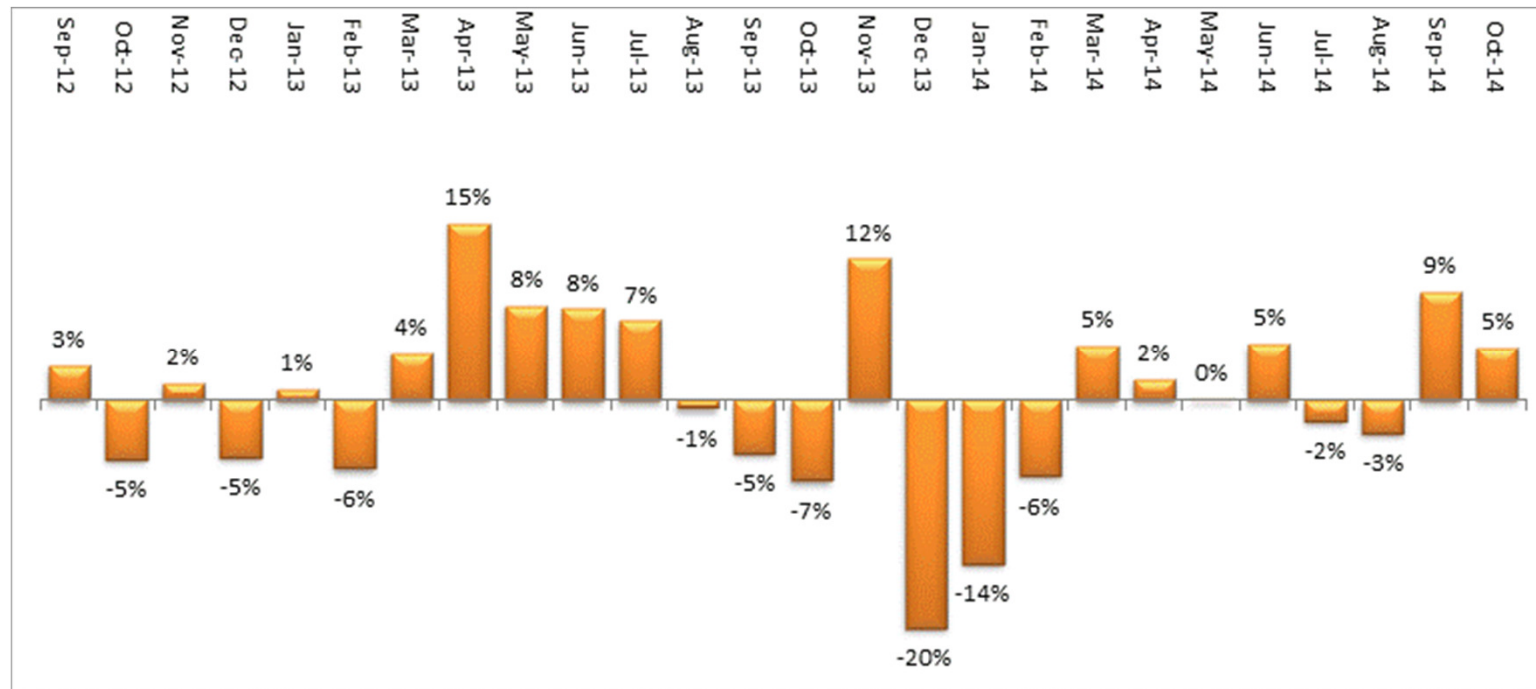


The gardening segment remains buoyant in October with the value attributable to growing media and fertilizers increasing 15% and 17% respectively month on month.

# How Has the Automotive Sector Performed?



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



Paint care products drive most growth for the automotive sector, up 19% compared to October last year. Cleaning products also perform well with tyre cleaners and upholstery cleaners growing 18% and 14% respectively month on month.

# For Further Insight and Enquiries:

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© GfK 2014 | Market-I (Tracks performance at sector level for total retail market – see pages 20-21 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