



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 139

cw 03/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

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Volatility and uncertainty is forecasted to remain throughout 2022 and beyond. It's never been more important to act based on facts, with data-driven decisions being made across the whole organization.

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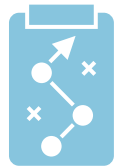
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the week

Balancing performance & sustainability becomes a need



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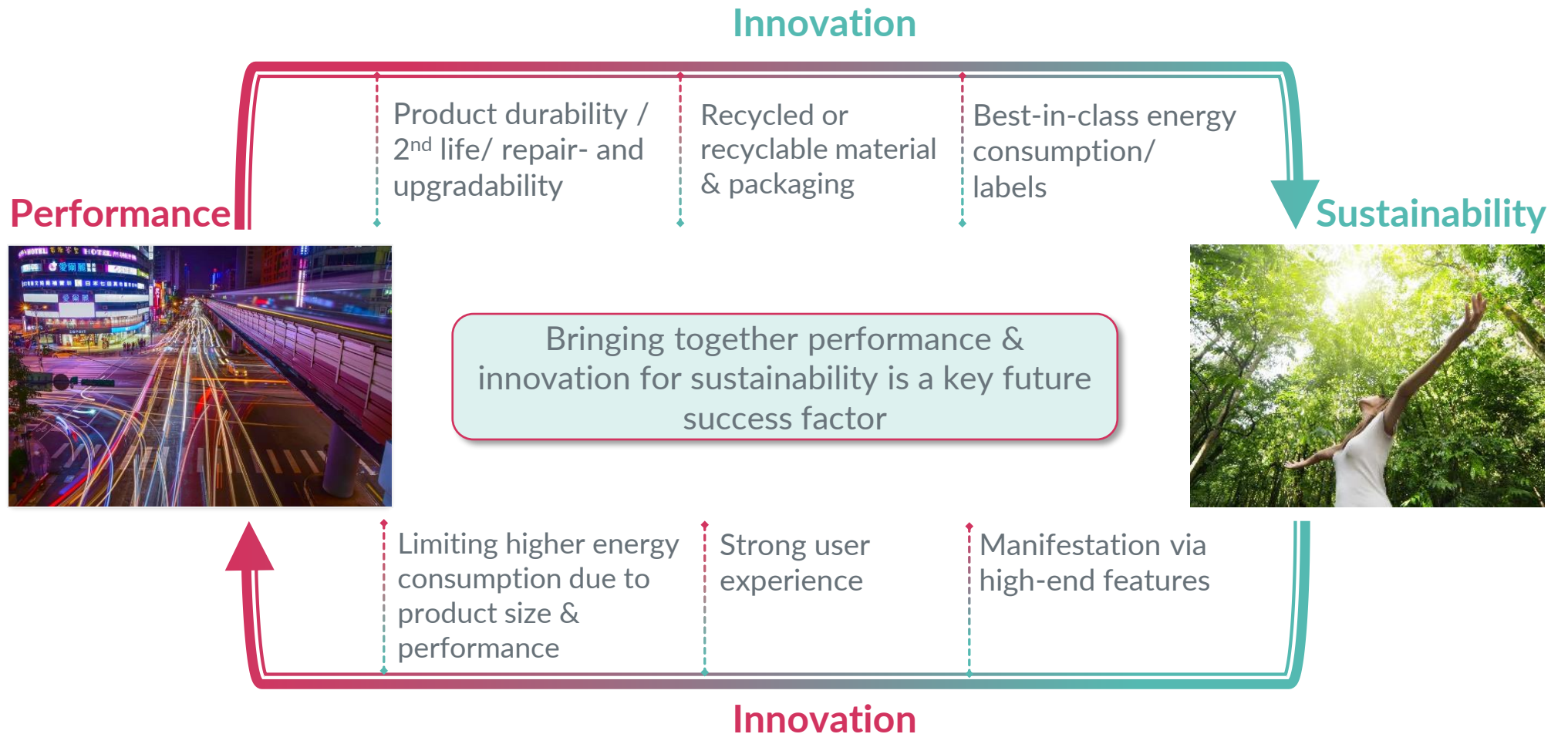
Spain

Russia

Japan

Brazil

China



Weekly retail insights from the Point of Sale

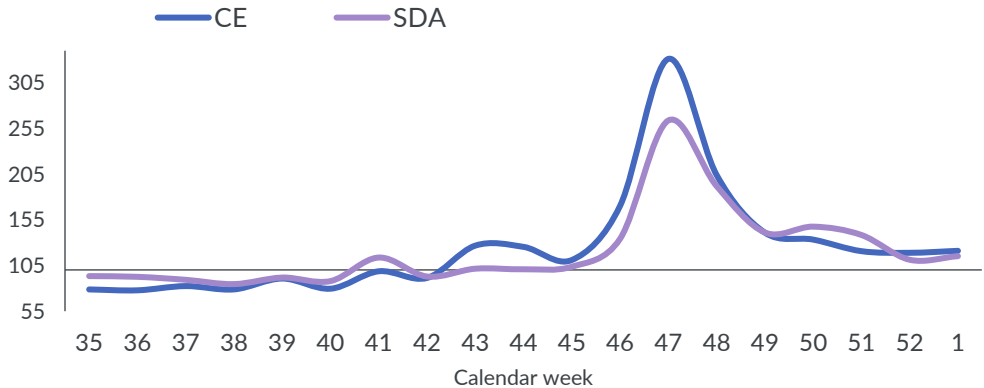
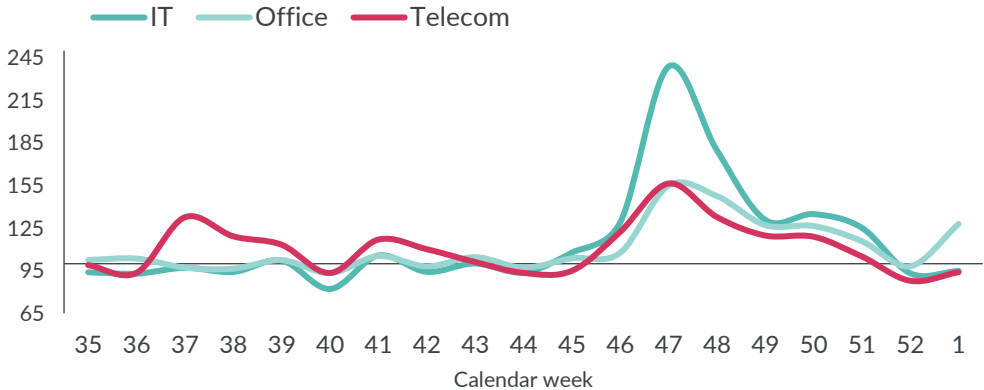
Spotlight on Germany



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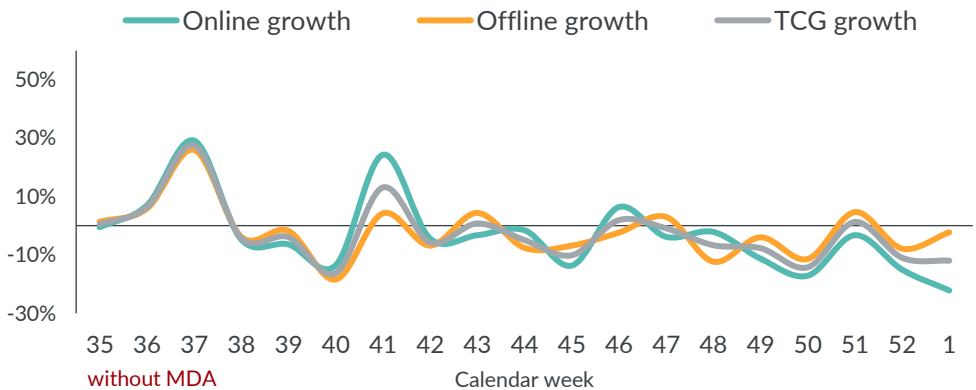
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

Index: 2022 average weekly turnover in EUR = 100



Please note: Below lines depict the sales growth rate vs same week of previous year.

Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- The total TCG market (excl. MDA in week 1) dropped by 12%, driven by online sales at -22%. Traditional retail was down -2%.
- All IT/Office products fell in double digits, led by desk computing at -25%. Laser printers were less negative and delivered -6%. Smartphones lagged at -1%.
- CE products declined in double-digits, too, with soundbars and audio home systems losing 28%. TV sales decreased by 22%. Dental care and vacuum cleaners were the product groups impacted the least at -9%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix.

Weekly retail insights from the Point of Sale

Spotlight on Great Britain



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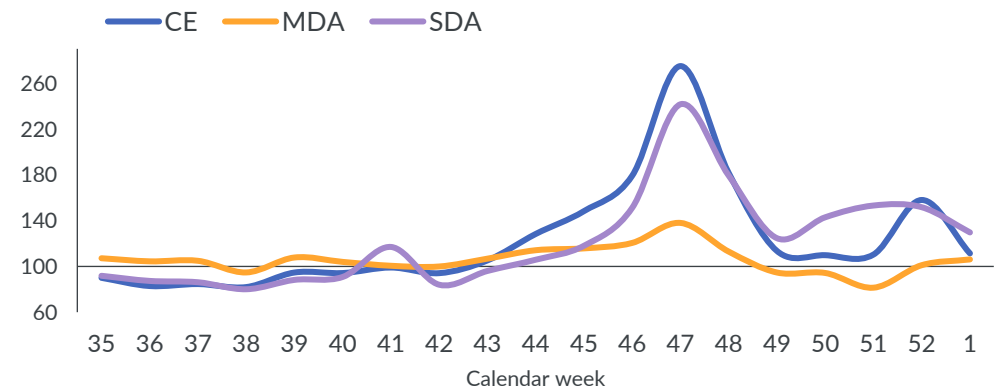
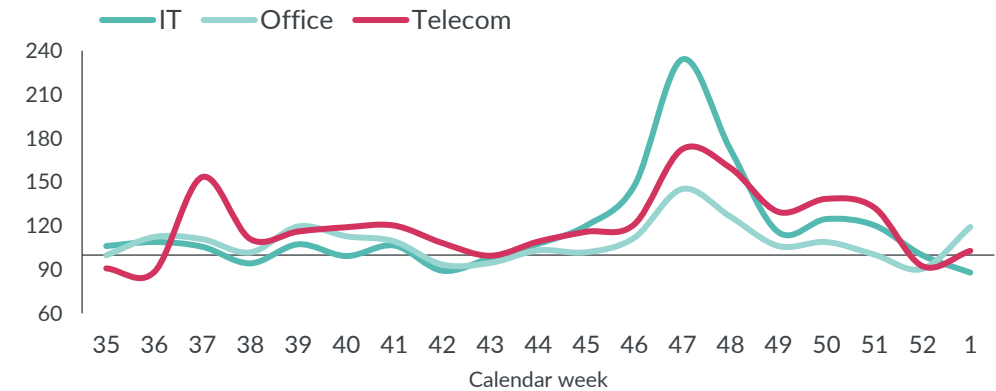
Russia

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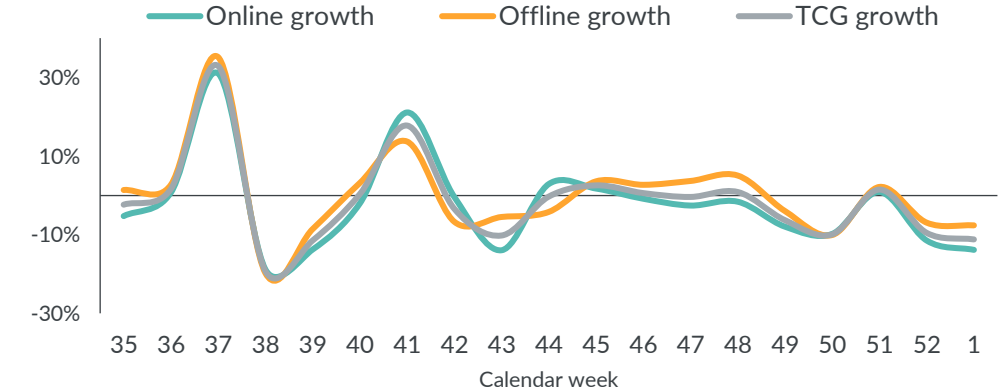
Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- Online sales delivered -14% (-11% the previous week) and traditional retail was down -8% (-7% the previous week), resulting in a downswing of the total TCG market of -11%.
- All IT/Office products were double-digit negative, led by media tablets at -47%. Smartphones lagged at -4%.
- CE products declined in double-digits, too, with TV sales losing 15%. Shavers (+5%) and washing machines (+7%) were the only categories that grew in week 1 2023 compared to the same week last year.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on France



About **gfknewron**

Fact of the week

Germany

Great Britain

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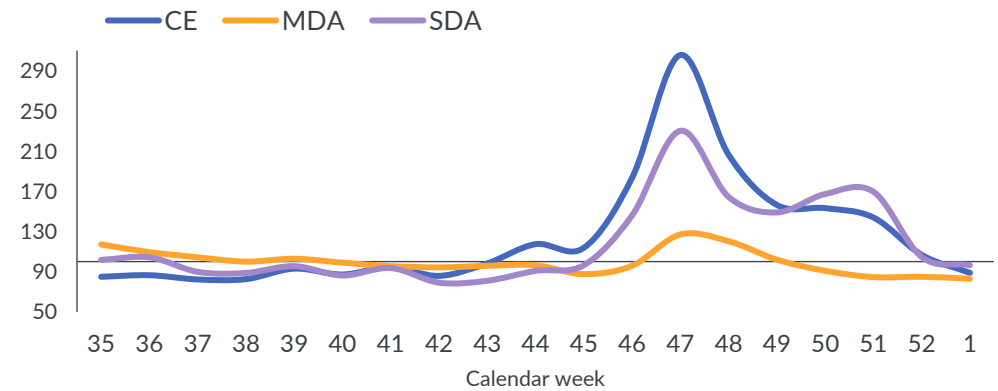
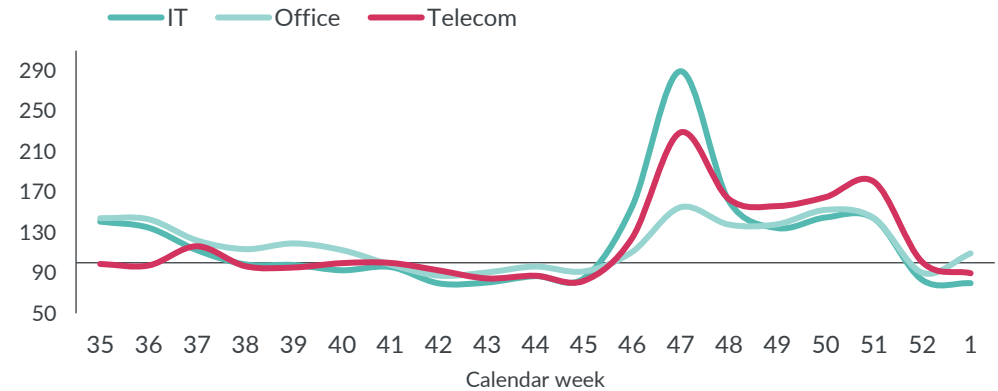
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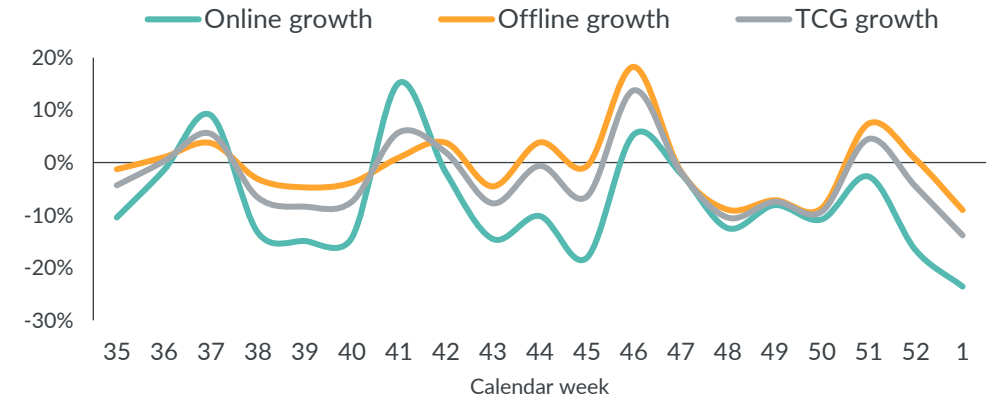
Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- Online sales delivered -24% (-17% the previous week) and traditional retail was down -9% (+1% the previous week), resulting in a downswing of the total TCG market of -14%.
- IT/Office products were double-digit negative, led by desk computing at -37% and laser printers at -36%. Inkjet printers and mice lagged at -6% and -9% respectively. Smartphones slumped at -17%.
- Most MDAs/SDAs and TV sales experienced single-digit declines. While audio home systems lost by 24%, soundbars were the only positive category in week 1 of 2023, at +7%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Air treatment, vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on Italy



About **gfknewron**

Fact of the week

Germany

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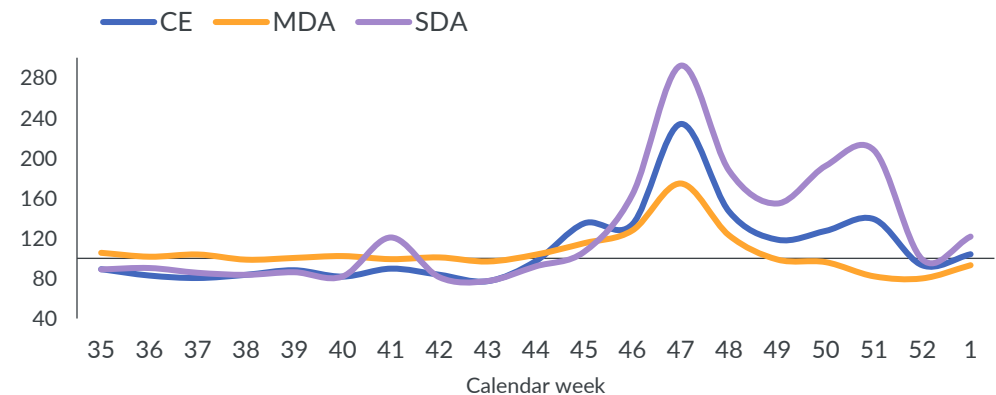
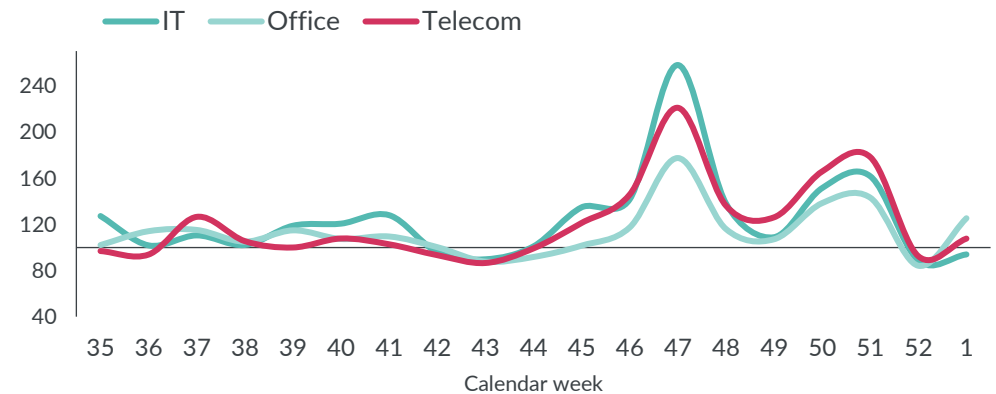
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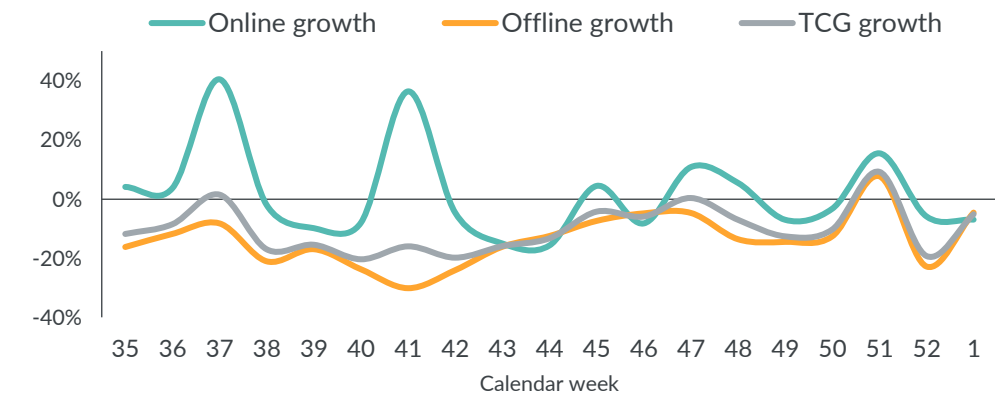
Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- The total TCG market fell by 5%, driven by online sales posting -7% in week 1 2023. Traditional retail declined by 5% in week 1, recovering from -23% in week 52.
- IT/Office products ranged from -21% for mobile computing to +24% for laser printers. Smartphones accelerated at +4%.
- While CE products lost in double digits (TVs positing -23%), air treatment delivered growth of 30%, followed by vacuum cleaners at +25% and shavers at +19%. MDAs gained 3%. Hot beverage makers were flat.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Air treatment, vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on Spain



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Germany

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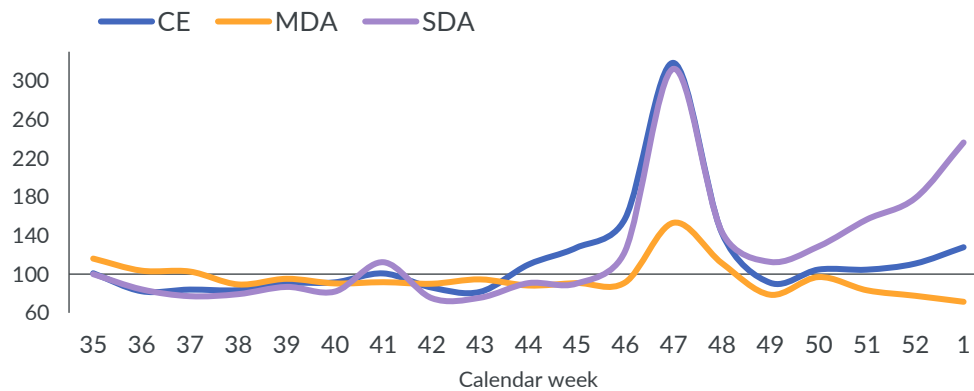
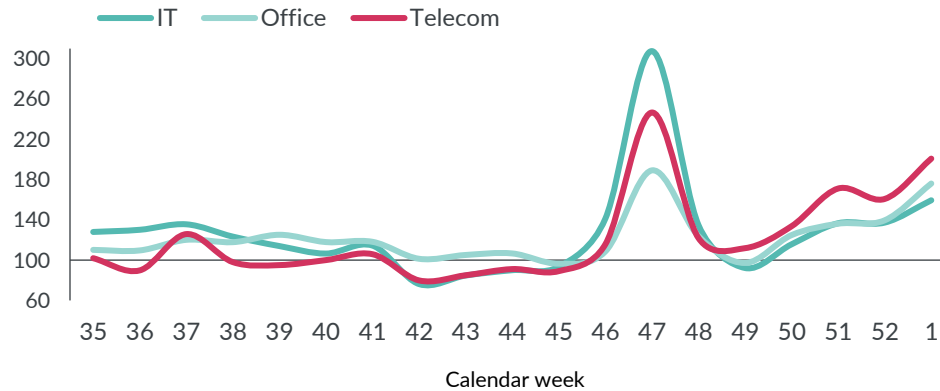
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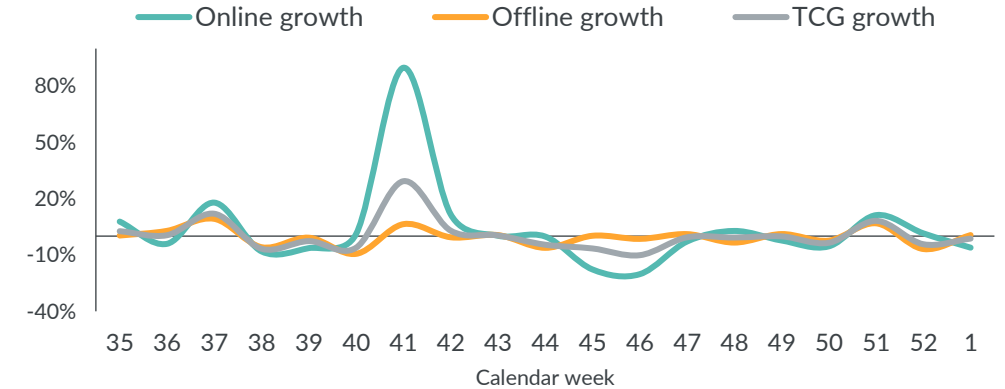
Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- Traditional retail experienced a slight plus of 1% vs week 1 in 2022, but this failed to compensate for the losses of online sales (-6%) and left the total TCG at a minus of 1%.
- Media tablets (+17%) were the best performing product group among IT/Office products. Desk computing and laser printers slumped at -16% and -11% respectively. Smartphones were up 5%.
- MDA/SDA/CE products posted a mixed picture with shavers in the lead at +8% and TVs bringing up the rear at -21%. Hot beverage makers were flat.

Weekly retail insights from the Point of Sale

Spotlight on Russia



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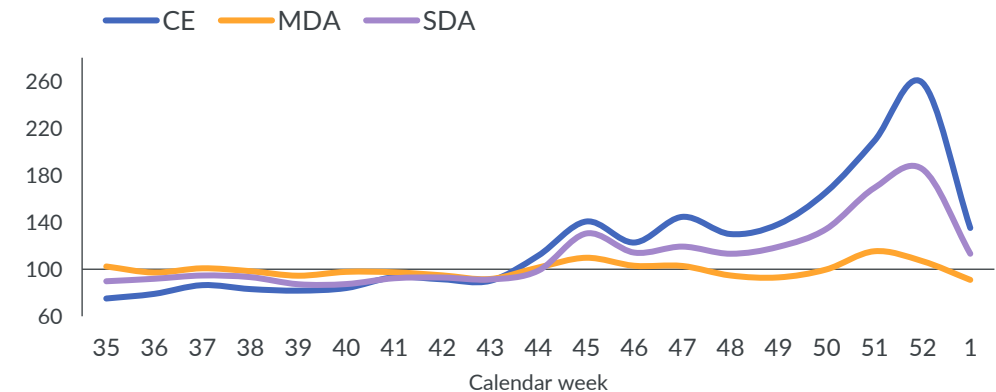
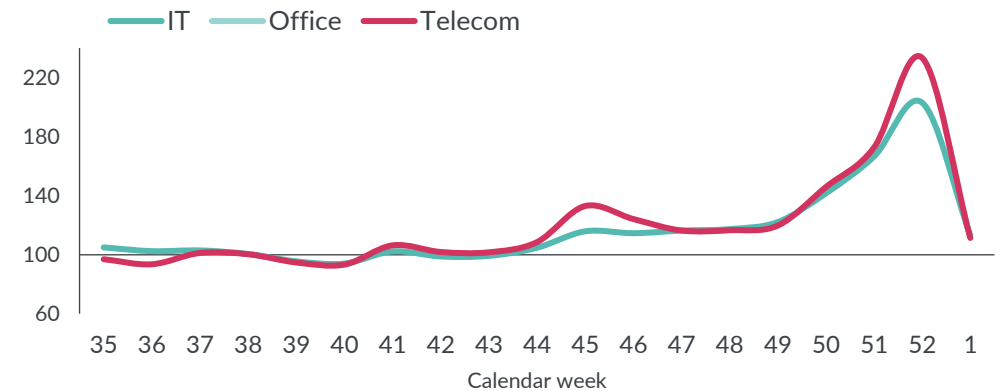
> **Russia**

Japan

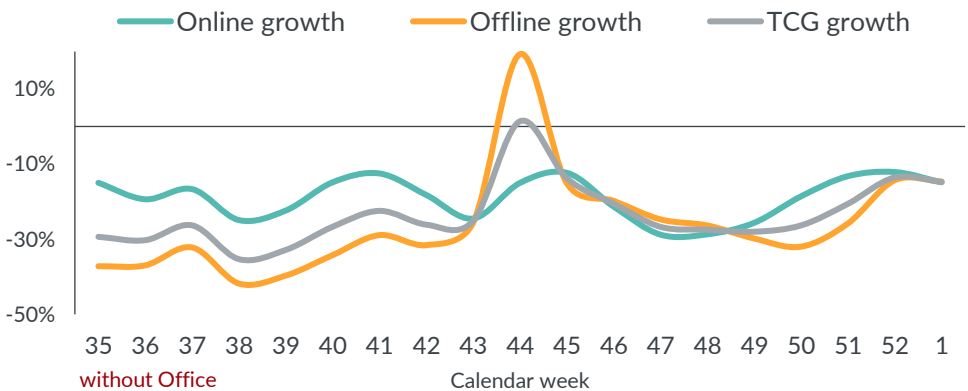
Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- At an identical rate of -15%, both traditional retail and online sales retail dragged the total TCG market (excl. Office in week 1) down by -15%.
- Monitors (+22%) and mice (+3%) posted growth while all other IT products lost in double digits, led by mobile computing at -21%. Keyboards were flat. Smartphones slumped at -23%.
- The overall negative picture for MDA/SDA/CE products was led by shavers at -26%. Air treatment posted a tiny positive 0.5%. As in past periods, audio home systems stood out at +88%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines - Small domestic appliances (SDA): Air treatment, vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on Japan



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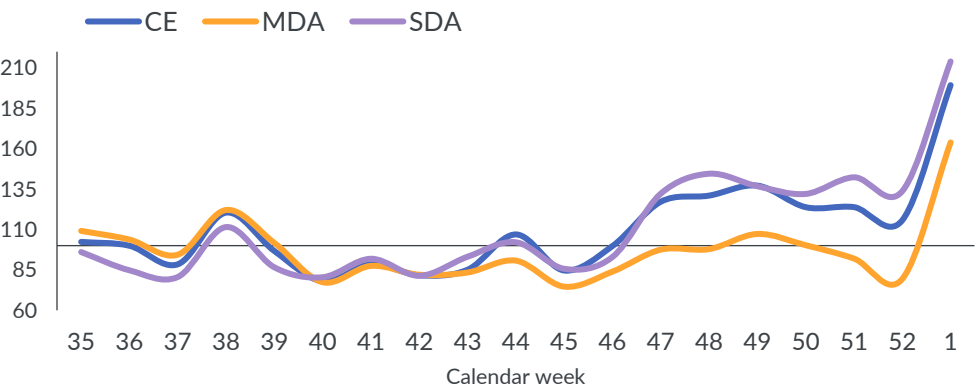
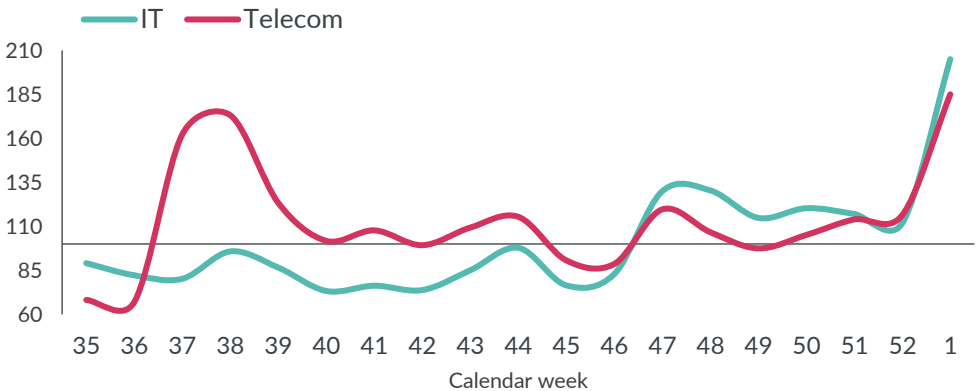
Russia

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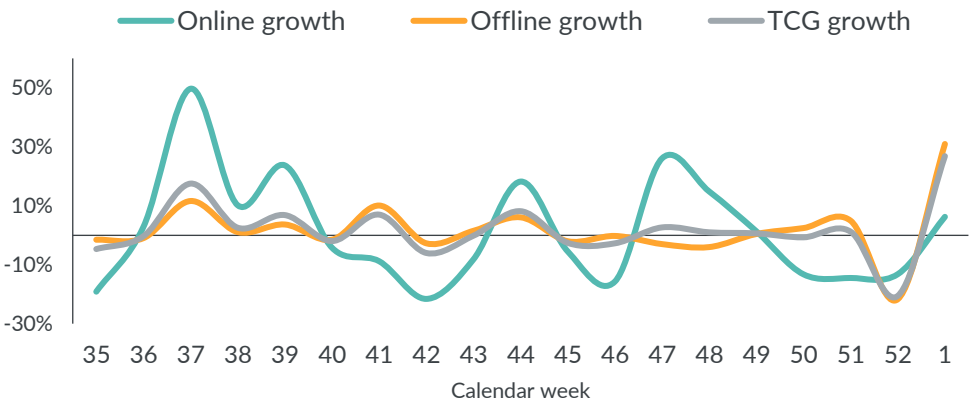
Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- Strong acceleration of traditional retail (+31%) boosted the total TCG market up by +27%. Online sales were weaker at +6%.
- All IT and telecom products contributed to this result, led by mobile computing at +55%. Headsets at +21% were behind.
- MDA/SDA/CE products witnessed double-digit positive trends, too, ranging from +31% for vacuum cleaners and shavers to +11% for air treatment to -4% for soundbars.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile computing, media tablets – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Air treatment, vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on Brazil



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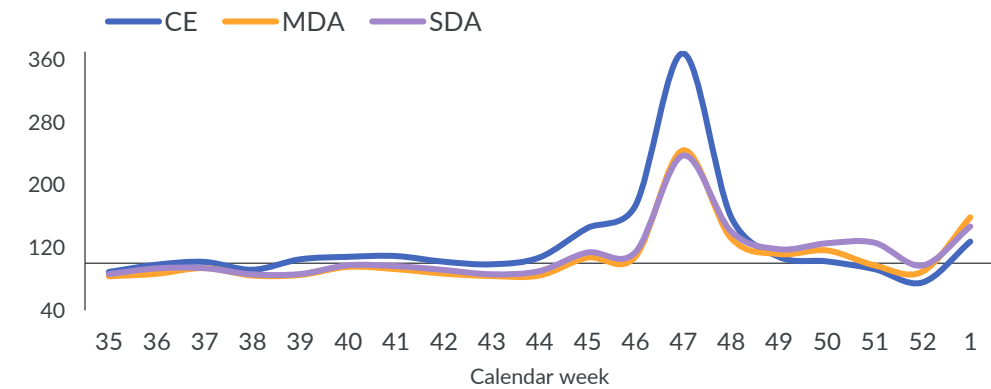
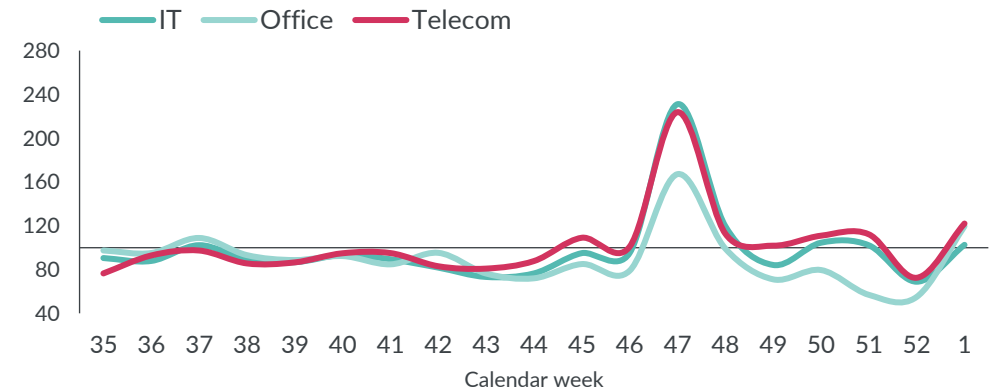
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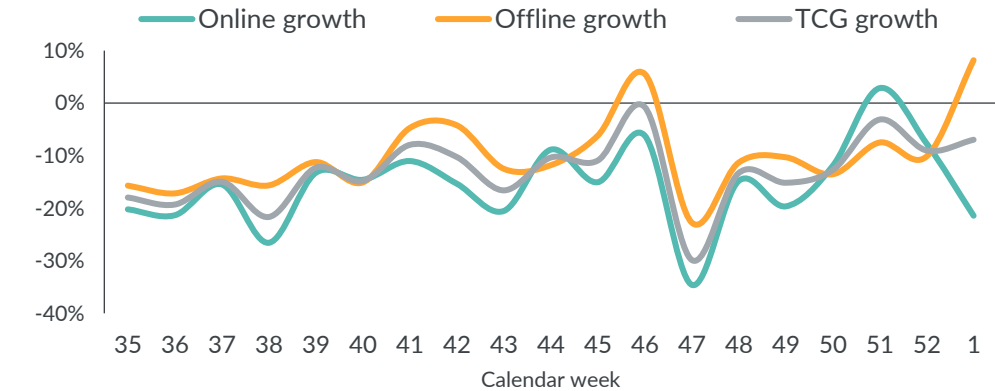
➤ Brazil

China

Index: 2022 average weekly turnover in EUR = 100



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- Solid decreases for online sales (-21%) delivered a negative trend (-7%) for total TCG which was not compensated by recovering traditional retail, up 8% (from -10% in week 52).
- The rates for IT/Office products ranged from -20% for mobile computing to +6% for inkjet printers. Smartphones slumped at -19%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+35%) and shavers (+34%). Audio home systems were flat. Only vacuum cleaners lagged at -7%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 01 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Vacuum cleaners, shavers, food preparation, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on China



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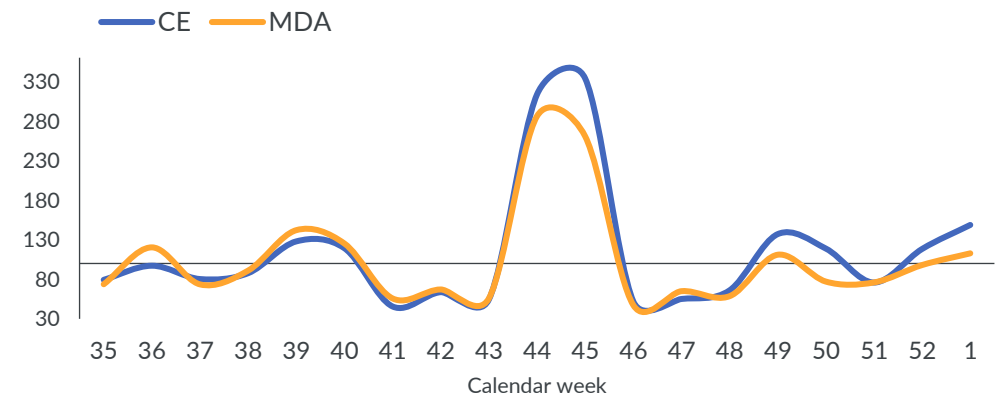
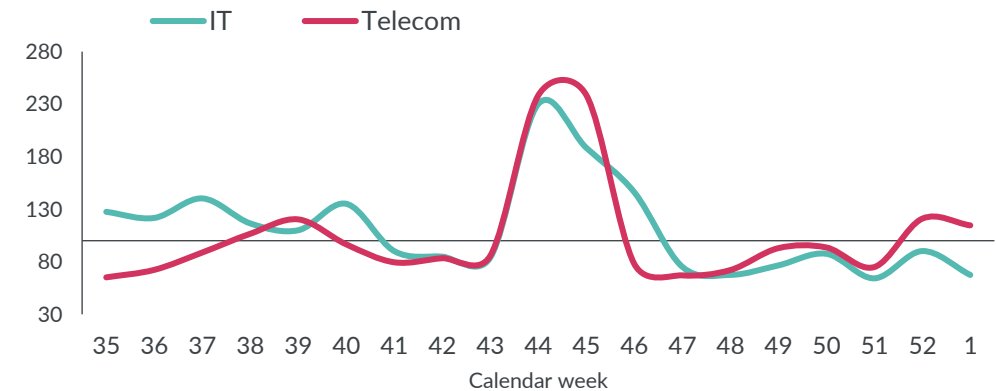
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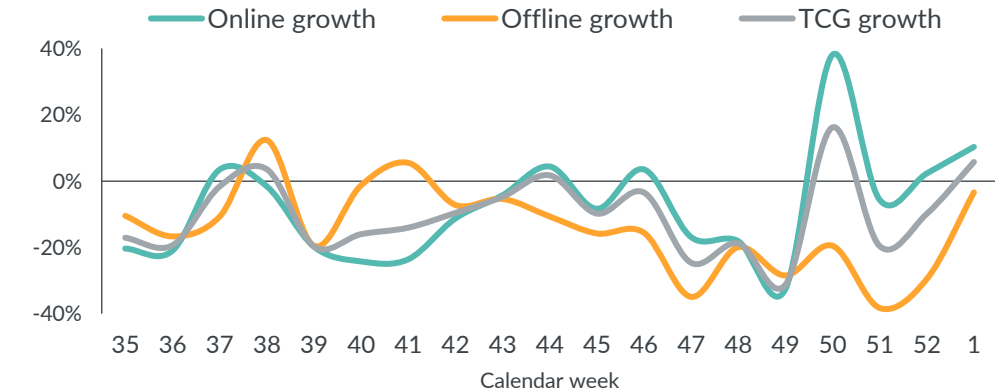
Brazil

> China

Index: 2022 average weekly turnover in EUR = 100*



Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %**



Key take aways in calendar week 01 (Jan 02 – Jan 08)



- Recovery and growth of +10% of online sales in week 1 of 2023 led to an upswing for the total TCG market of +6%. Traditional retail posted -3%, up from -30% in week 52 in 2022.
- Mobile PCs posted a slight increase of 2% compared to week 1 in 2022. Smartphones delivered a minus of 10%.
- Week 1 in 2023 saw growth of 10% for TV sales. While washing machines slightly decreased (-1%), cooling accelerated by 16%.



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Knowledge

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