



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 140

cw04/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Russia

Japan

Brazil

China

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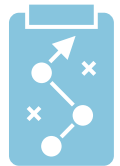
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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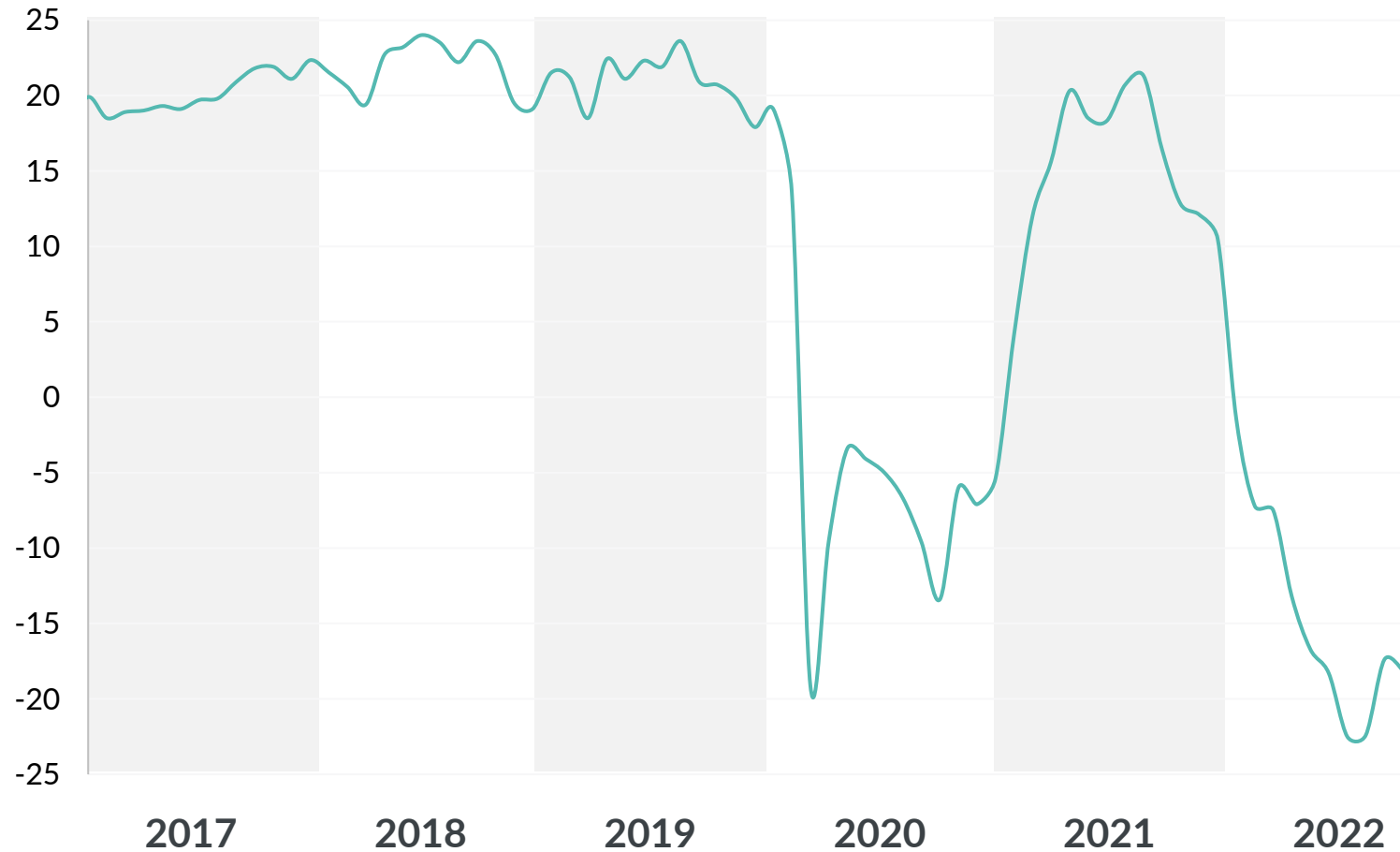
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Fact of the week

European Consumer Climate faces a small setback at the end of the year



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- China



Economic expectations
Index: -25 | +/- vs prev. month: +5%



Income expectations
Index: -36 | +/- vs prev. month: +6%



Willingness to buy
Index: -32 | +/- vs prev. month: +1%

Weekly retail insights from the Point of Sale

Spotlight on Germany



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).

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

About **gfknewron**

Fact of the week

➤ Germany

Great Britain

France

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Spain

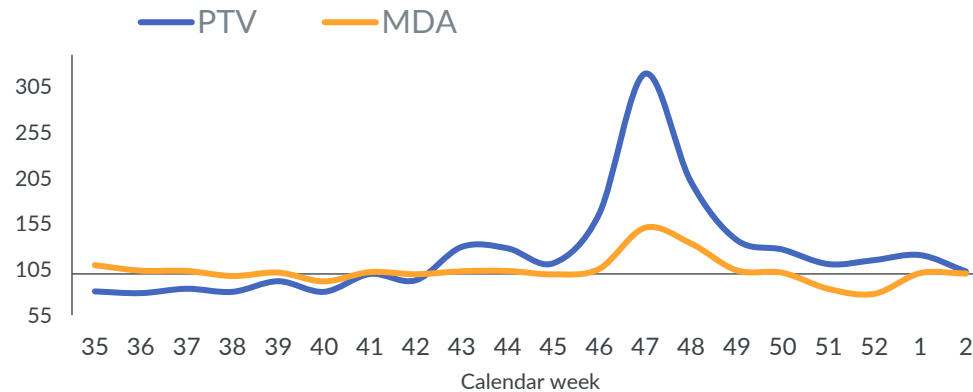
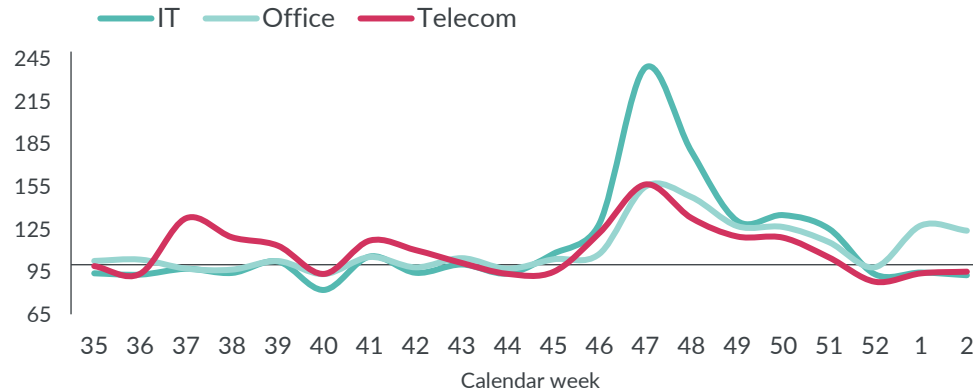
Russia

Japan

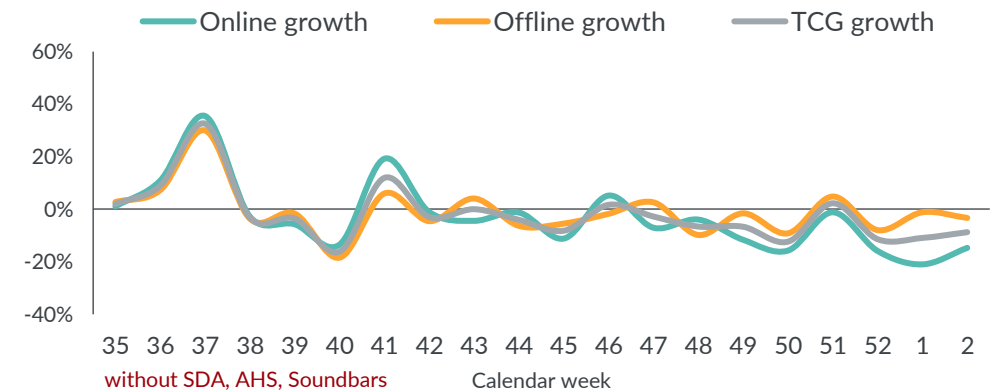
Brazil

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 02 (Jan 09 – Jan 15)



- The total TCG market (excl. SDA, audio home systems, and soundbars in week 2) dropped by 22%, driven by online sales at -27%. Traditional retail was down -17%.
- All IT products fell in double digits, led by desk computing at -30%. Printers declined less, laser printers by -4% and inkjet printers by -1%. Smartphones lagged at -4%.
- PTV declined in double-digits, too, by 18%. Cooling and washing machines posted slight increases of +5% and +6% respectively.

Weekly retail insights from the Point of Sale

Spotlight on Great Britain



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Fact of the week

Germany

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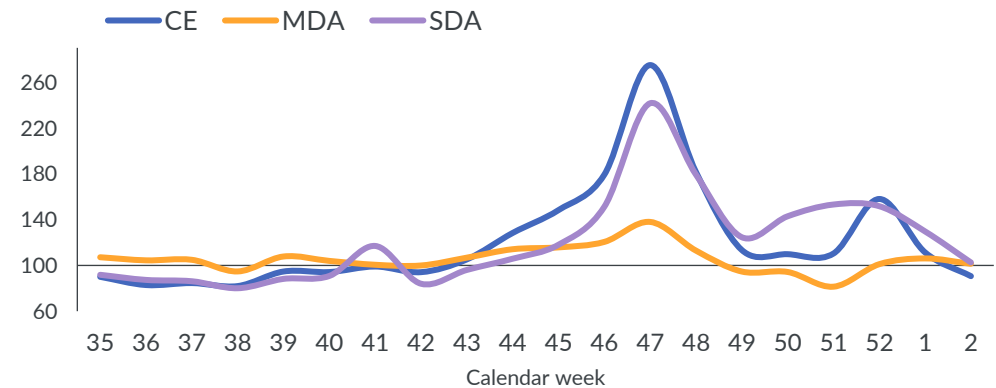
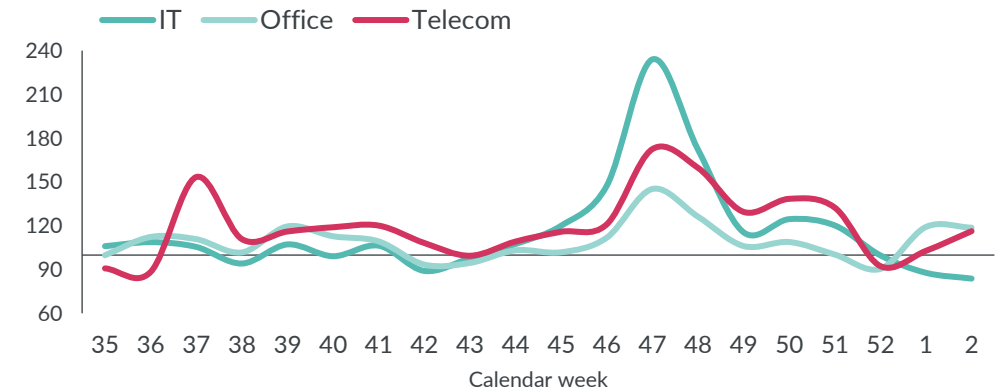
Russia

Japan

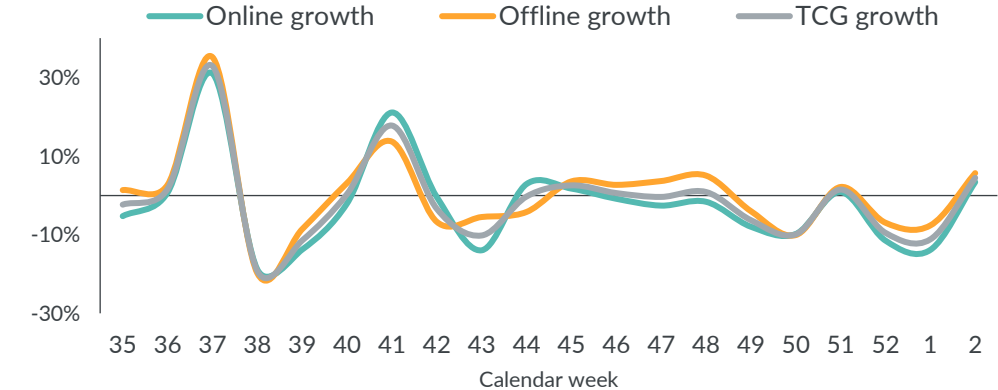
Brazil

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 02 (Jan 09 – Jan 15)



- Online sales recovered at +3% (up from -14% the previous week) and traditional retail was up +6% (from -8% the previous week), resulting in an uptick for the total TCG market of +4%.
- Except for flat inkjet printers, all IT/Office products were double-digit negative, led by media tablets at -34%. Smartphones accelerated at +25%.
- CE products declined in double-digits, too, with TV sales losing 13%. The mixed picture for MDA/SDA categories saw shavers in the lead (+16%). Cooling and hot beverage makers were stable compared to the same week last year.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 02 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



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Fact of the week

Germany

Great Britain

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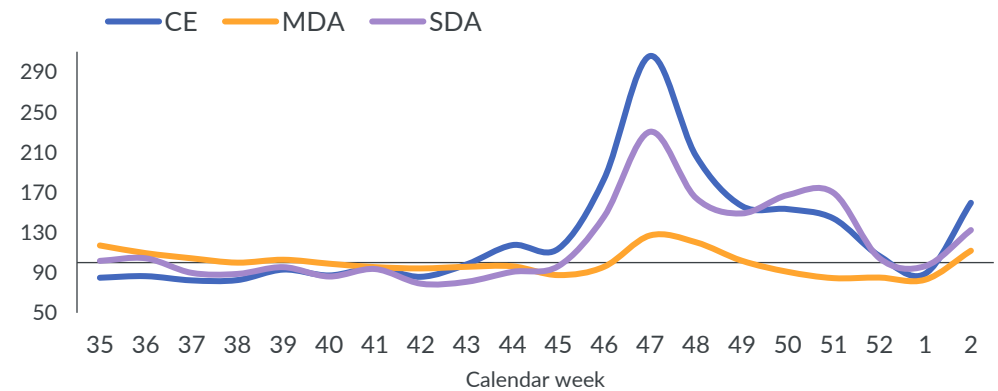
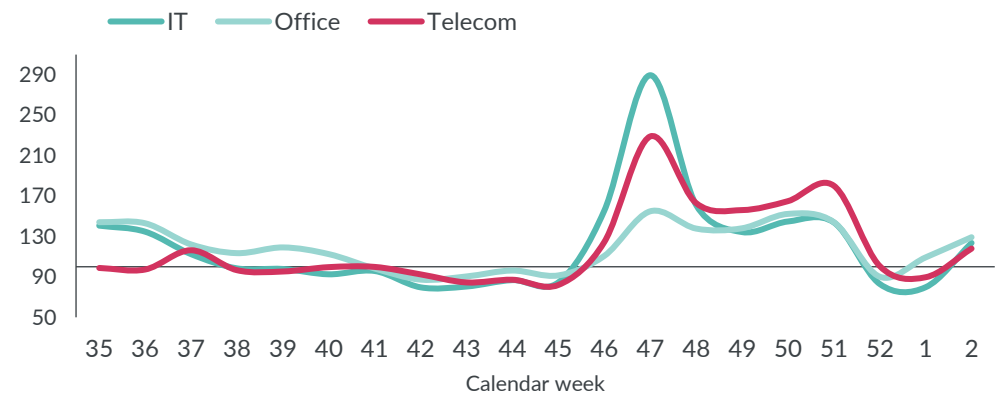
Russia

Japan

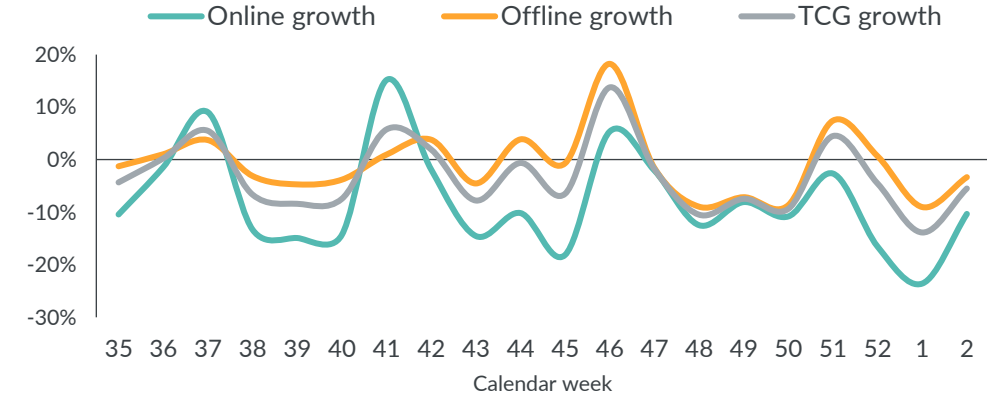
Brazil

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 02 (Jan 09 – Jan 15)



- Online sales delivered -10% (-24% the previous week) and traditional retail was down -3% (-9% the previous week), resulting in a downswing of the total TCG market of -6%.
- IT/Office products were double-digit negative, led by desk computing at -35% and laser printers at -37%. Inkjet printers delivered +5%. Smartphones lagged at -4%.
- Most MDAs/SDAs and TV sales experienced single-digit declines. Only washing machines (+4%) and vacuum cleaners (+2%) were slightly positive. While soundbars posted +12%, audio home systems lost by 15%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 02 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



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Fact of the week

Germany

Great Britain

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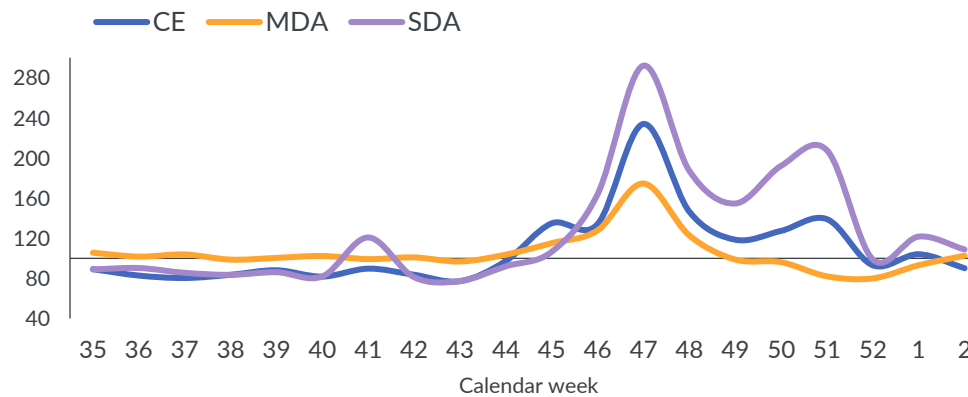
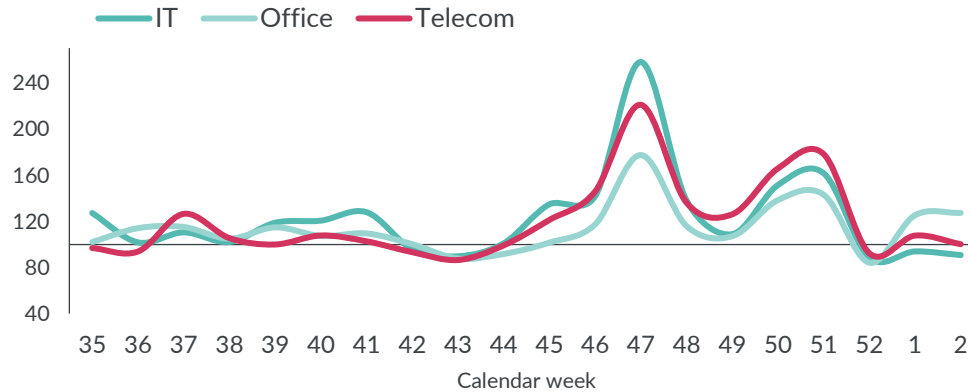
Russia

Japan

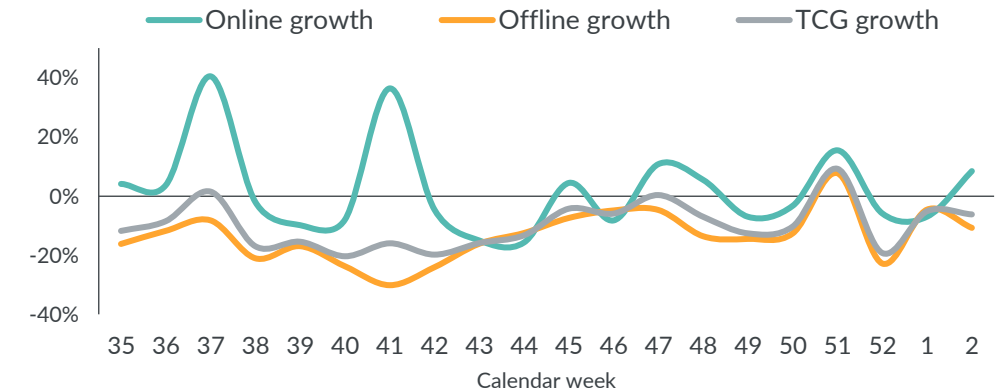
Brazil

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 02 (Jan 09 – Jan 15)



- The total TCG market fell by 6%, driven by traditional retail posting -11% in week 2 2023. Online sales recovered at +8%, up from -7% in week 1.
- IT/Office products ranged from -2% for desktop computing to -25% for mobile computing. Smartphones were stable at -0.2%.
- While CE products lost in double digits (TVs posting -24%), vacuum cleaners delivered growth of 33%, followed by air treatment at +26%. MDAs gained 13% (cooling at +16%, washing machines at +12%). Food preparation slumped at -9%. Dental care was flat.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 02 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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



About **gfknewron**

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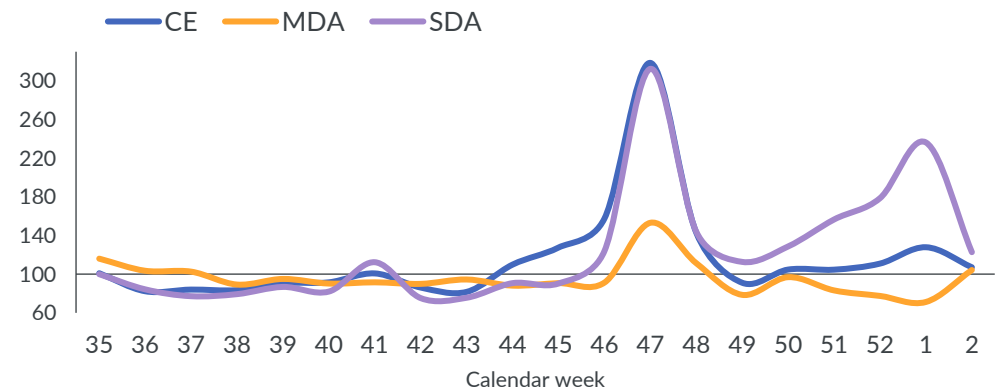
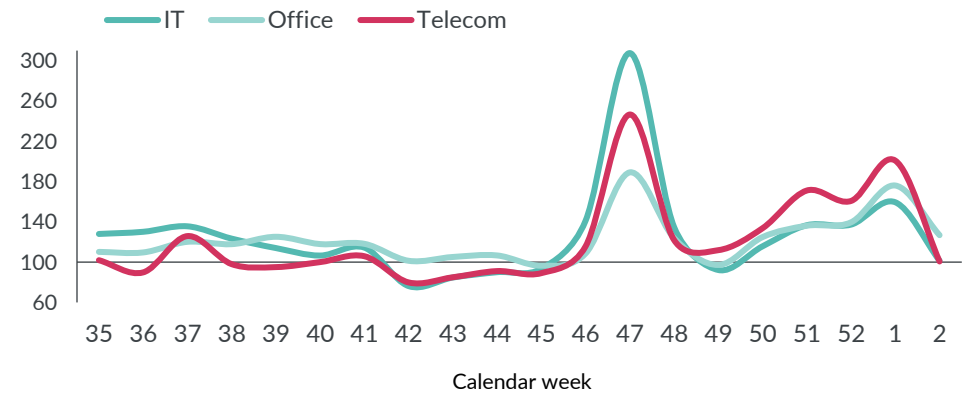
Russia

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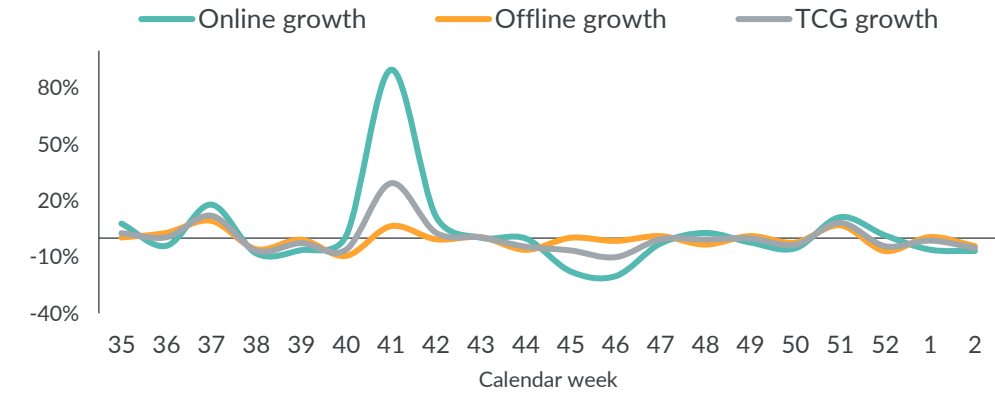
Brazil

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 02 (Jan 09 – Jan 15)



- Traditional retail experienced a minus of 4% vs week 2 in 2022 and online sales were down by -7%, resulting in a downswing of the total TCG market of 5%.
- Desktop computing (-30%) was the worst performing product group among IT/Office products. Media tablets slumped at -25%. Smartphones were up 6% and headphones were positive, too, at +10%.
- MDA/SDA/CE products posted a mixed picture with shavers in the lead at +15% and TVs bringing up the rear at -20%. Hot beverage makers were flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 02 2023 (no comparability with 2019); Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

Weekly retail insights from the Point of Sale

Spotlight on Russia



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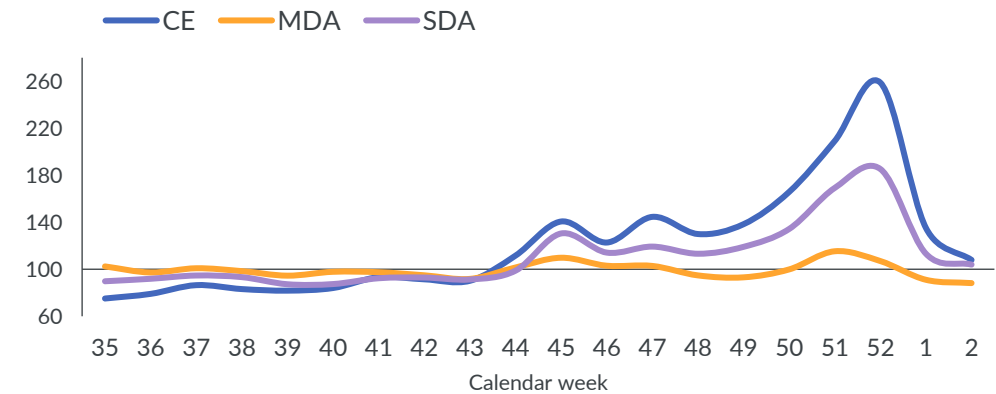
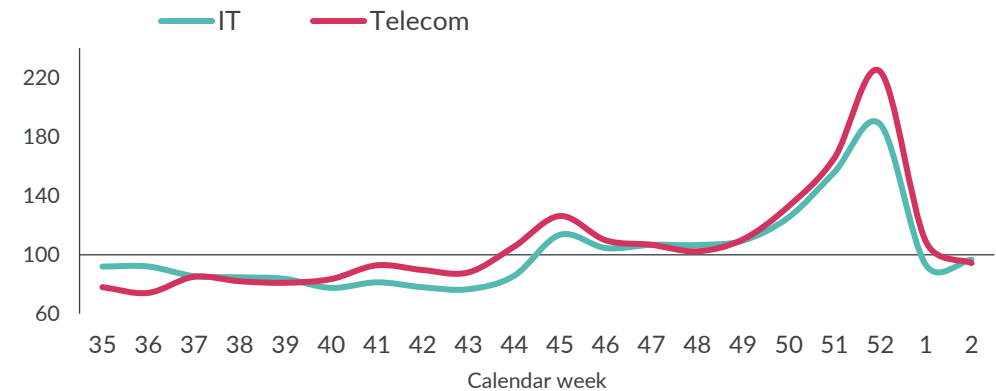
> **Russia**

Japan

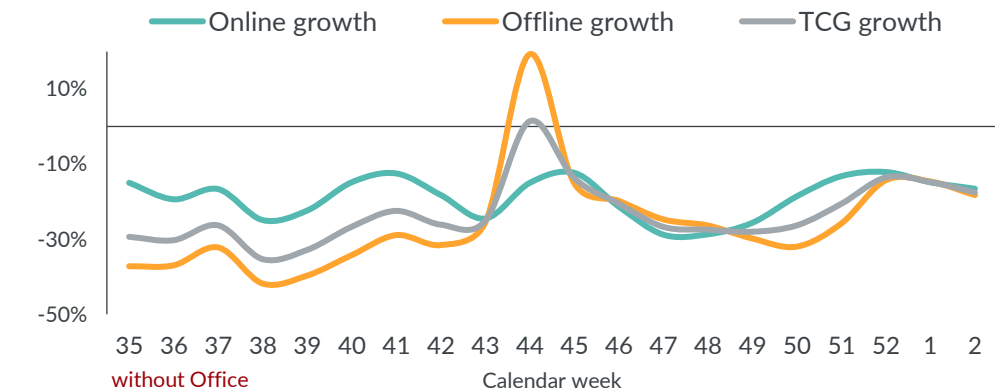
Brazil

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 02 (Jan 09 – Jan 15)



- At a nearly identical rate, both traditional retail (-18%) and online sales (-17%) dragged the total TCG market (excl. Office in week 2) down by -18%.
- Monitors (+15%) and mice (+1%) posted growth while most other IT products lost in double digits, led by mobile computing at -29%. Keyboards posted a slight decrease of -2%. Smartphones slumped at -27%.
- The overall negative picture for MDA/SDA/CE products was led by soundbars at -45%. Washing machines were flat. Air treatment posted +5%. As in past periods, audio home systems stood out at +88%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 02 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



About **gfknewron**

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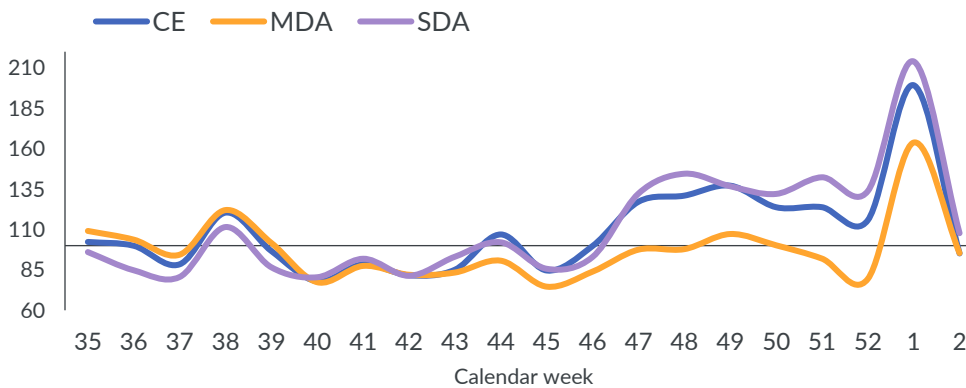
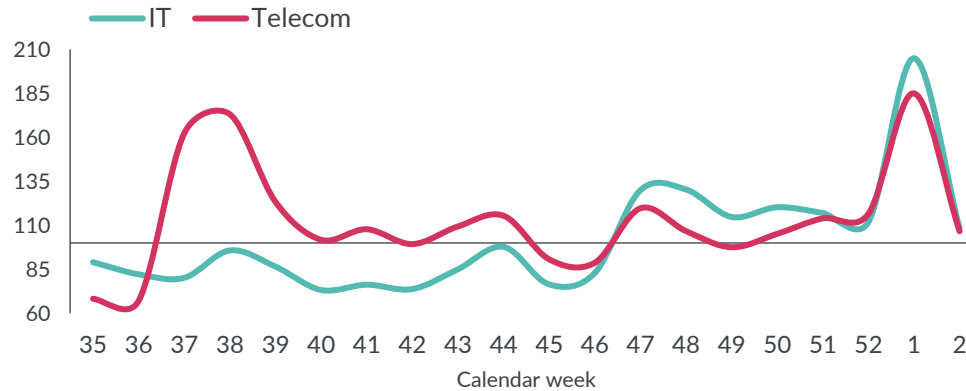
Russia

➤ Japan

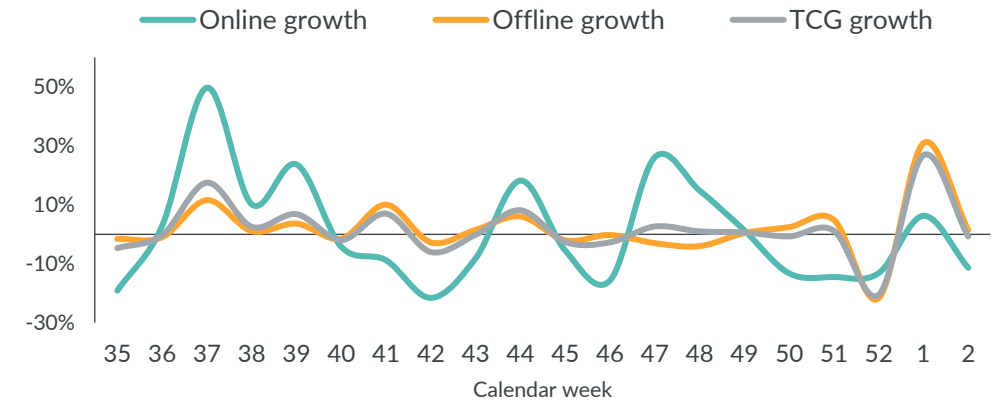
Brazil

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 02 (Jan 09 – Jan 15)



- After a spike at +31% in week 1, traditional retail posted a slight uptick of 2%. Combined with decelerating online sales (-11%) this delivered a downswing of the total TCG market of 1%.
- The driver of this development were media tablets at -26%. Mobile computing posted +11%, smartphones and headsets were single-digit positive.
- Most MDA/SDA/CE products witnessed negative trends apart from soundbars at +20%, dental care at +5%, and cooling at +4%. Food preparation and hot beverage makers were stable.

Weekly retail insights from the Point of Sale

Spotlight on Brazil



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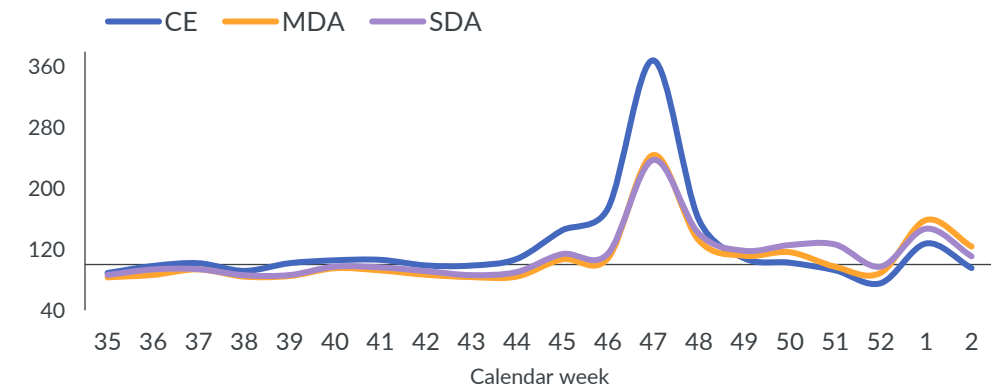
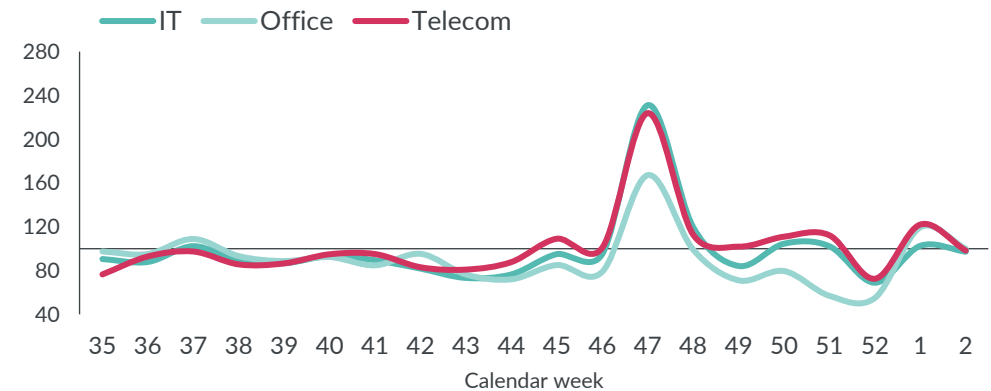
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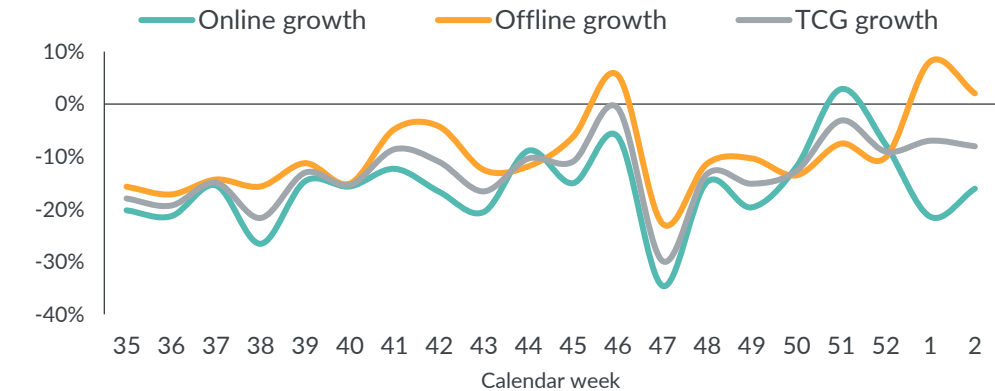
➤ Brazil

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 02 (Jan 09 – Jan 15)



- Solid decreases for online sales (-16%) delivered a negative trend (-8%) for total TCG which was not compensated by traditional retail (+2%).
- The rates for IT/Office products ranged from -17% for media tablets to +10% for laser printers. Desktop computing was stable. Smartphones slumped at -19%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+29%) and shavers (+43%). All other categories were single-digit positive with washing machines at +2% being the weakest category in week 2.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 02 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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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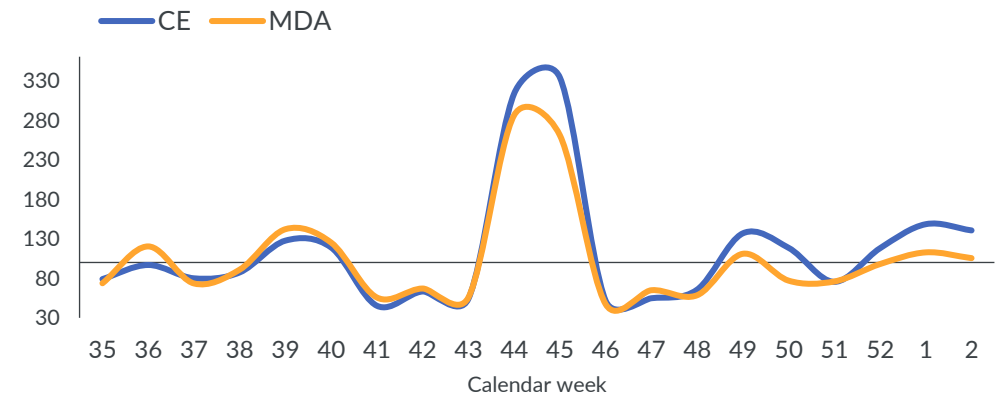
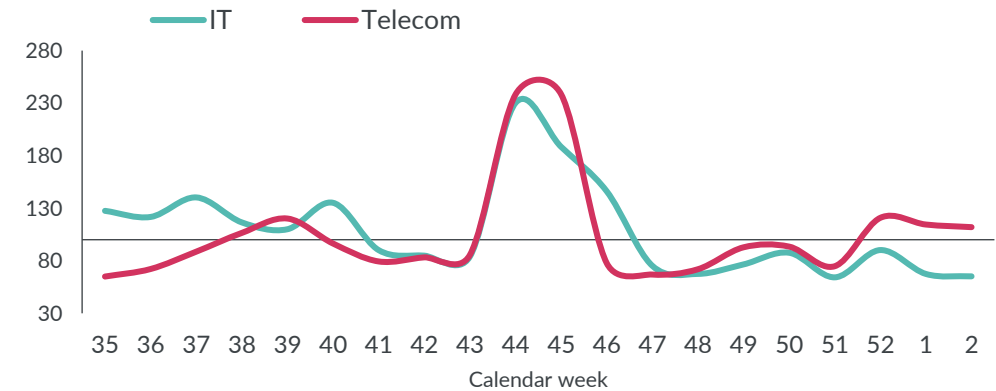
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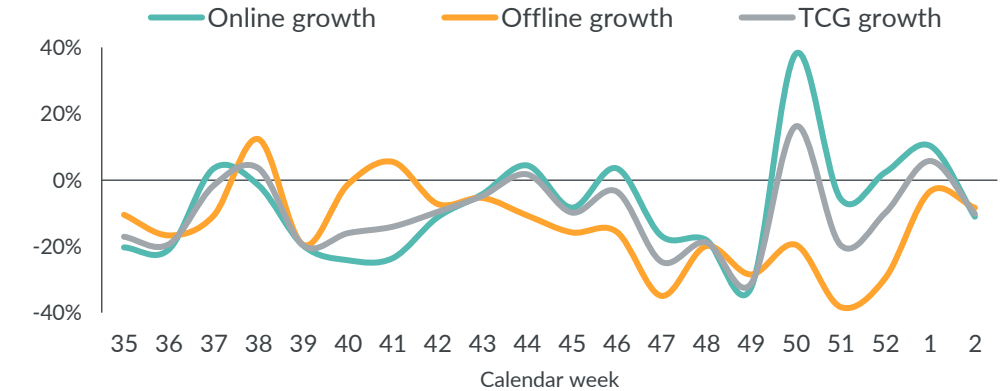
Brazil

> 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 02 (Jan 09 – Jan 15)



- After growth of 10% in week 1, online sales dropped by 11% in week 2 of 2023, leading to a downswing of 10% for the total TCG market. Traditional retail posted -8%, down from -3% in week 1.
- Mobile PCs decelerated by 14%. Smartphones delivered a minus of 7%.
- Week 2 in 2023 saw solid drops for TV sales (-24%) and washing machines (-20%). Cooling was less negative at -5%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 02 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile computing – Consumer Electronics (CE): TVs – Major domestic appliances (MDA): Cooling and washing machines; Value is in EUR NSP (non-subsidized price) fix. *Office and SDA weekly extrapolated not audited in China. **Traditional sales represent cities belonging to the higher tiers.



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