



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 141

cw05/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

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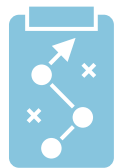
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Fact of the Week

Reasons to choose an online or an offline retailer blurs



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➤ Fact of the week

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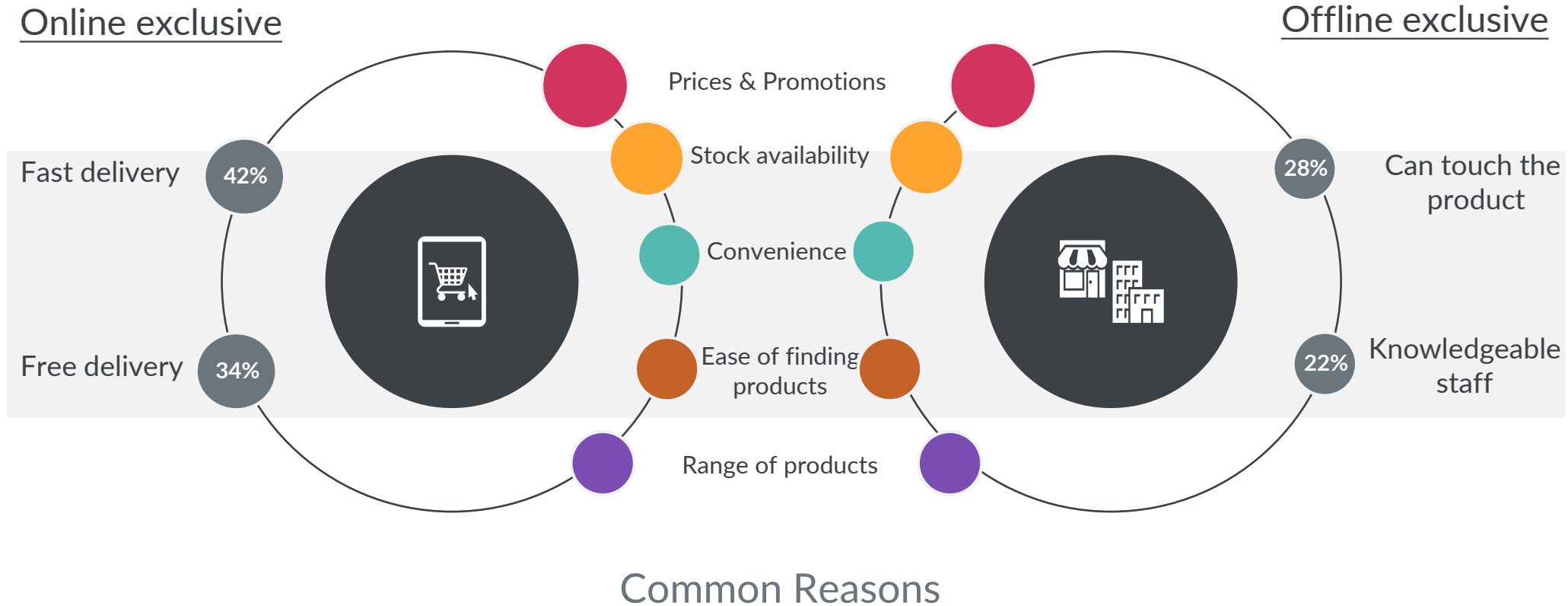
Spain

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Weekly retail insights from the Point of Sale

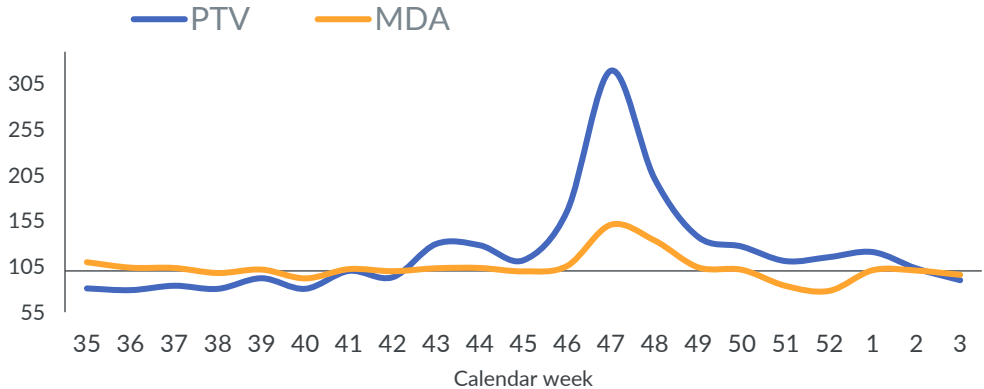
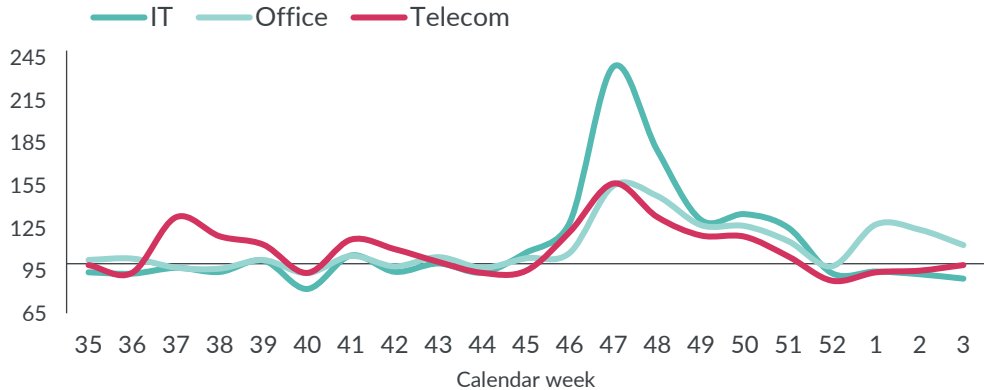
Spotlight on Germany



- About **gfknewron**
- Fact of the week
- > Germany**
- Great Britain
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

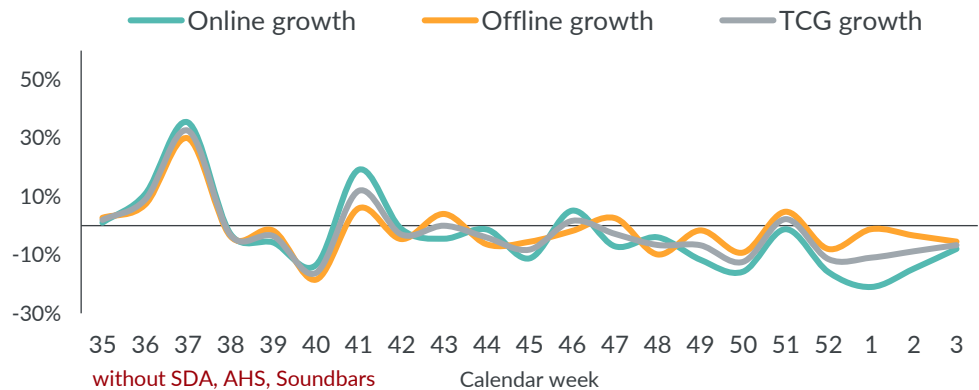
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 03 (Jan 16 – Jan 22)



- The total TCG market (excl. SDA, audio home systems, and soundbars in week 3) dropped by 7%, driven by online sales at -8%. Traditional retail was down -5%.
- IT products ranged from -33% for desk computing to +1% for media tablets. Printers declined less, laser printers by -15% and inkjet printers by -9%. Smartphones accelerated by 5%.
- TV sales declined by 22%. Washing machines were nearly stable at +1%. Cooling decelerated at -4%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 03 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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): 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 Great Britain



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Fact of the week

Germany

> Great Britain

France

Italy

Spain

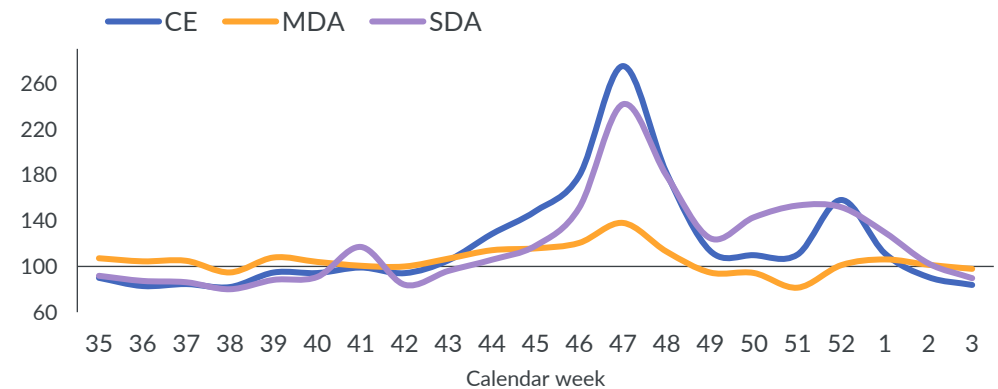
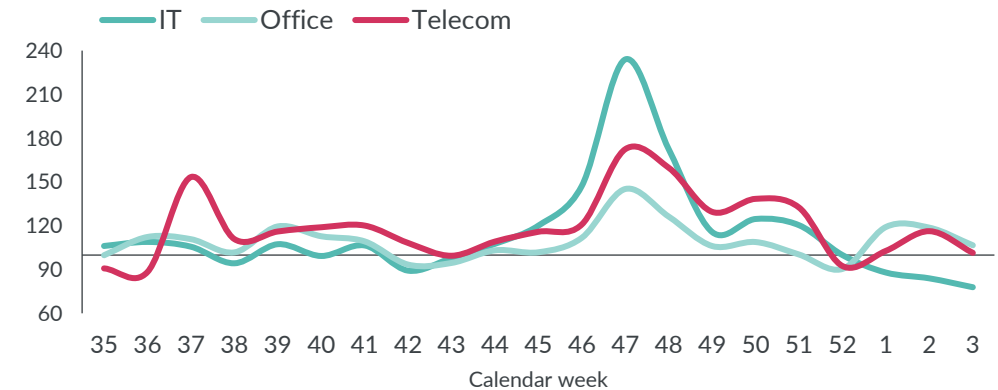
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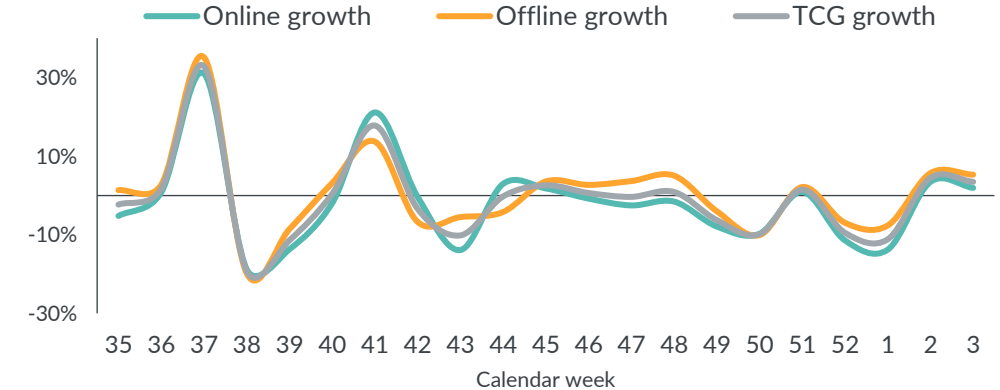
Brazil

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 03 (Jan 16 – Jan 22)



- Online sales posted +2% (from +3% the previous week) and traditional retail was up +5% (from +6% the previous week), resulting in an uptick for the total TCG market of +3%.
- Except for inkjet printers at -6%, all IT/Office products were double-digit negative, led by desk computers at -29%. Smartphones accelerated at +23%.
- CE products declined in double-digits, too, with TV sales losing 12%. The mixed picture for MDA/SDA categories saw shavers and washing machines in the lead (+5%). Dental care was constant compared to the same week last year. Food preparation slumped at -19%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 03 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): 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

> France

Italy

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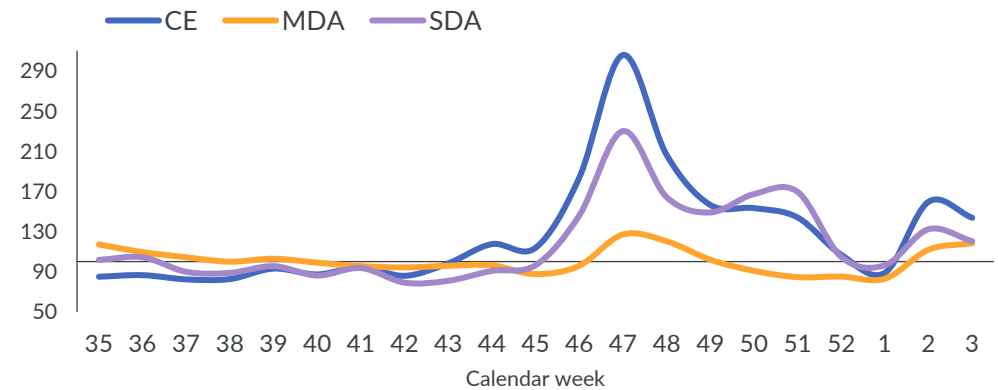
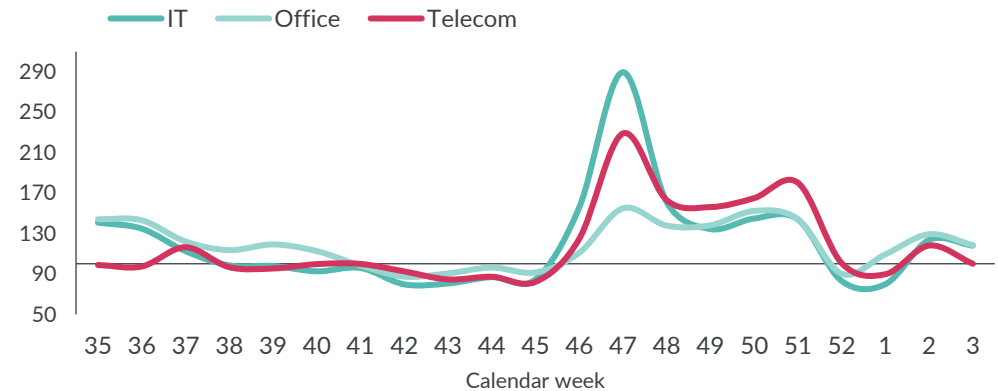
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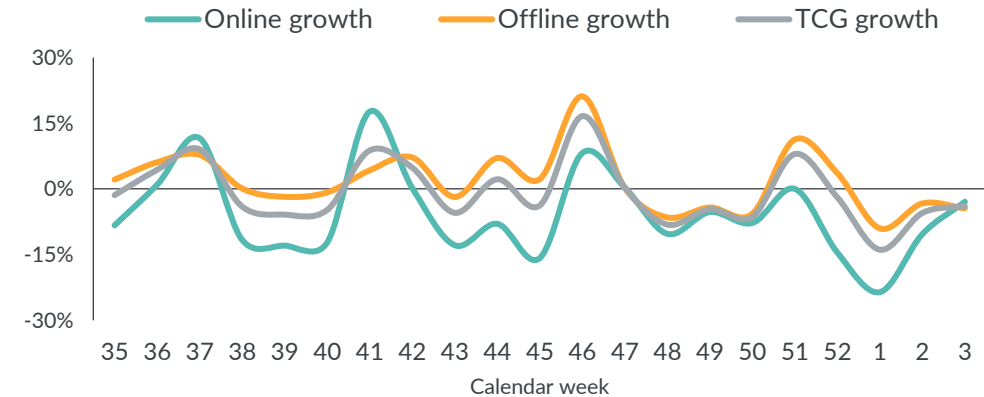
Brazil

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 03 (Jan 16 – Jan 22)



- Online sales delivered -3% (-10% the previous week) and traditional retail was down -4% (-3% the previous week), resulting in a downswing of the total TCG market of -4%.
- Except for headsets at +8%, all IT/Office and Telecom products delivered negative trends, led by desk computing at -32% and laser printers at -25%. Smartphones lagged at -4%.
- Among MDA/SDA/CE product groups, audio home systems were the weakest category at -17%, followed by food preparation and shavers at -12%. TV sales were down by 7%. Food preparation won 7%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 03 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

Great Britain

France



Italy

Spain

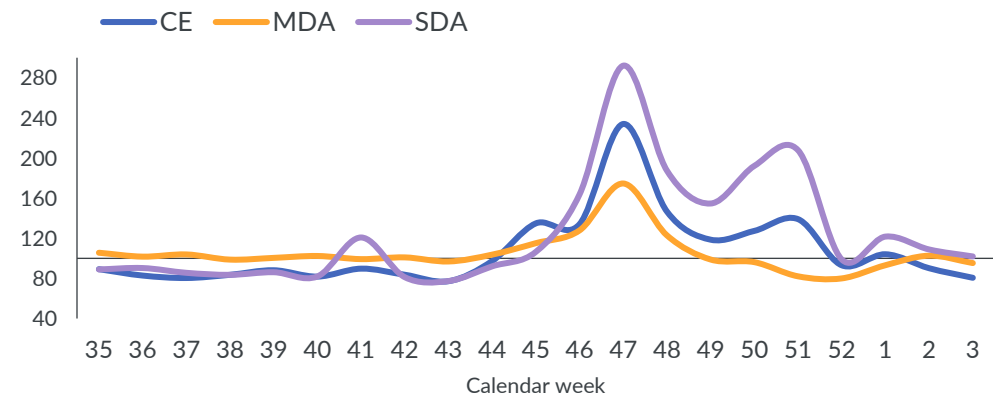
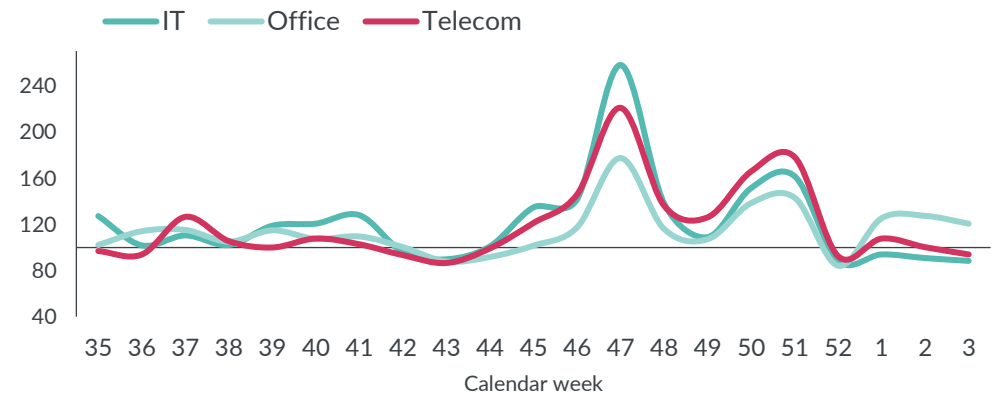
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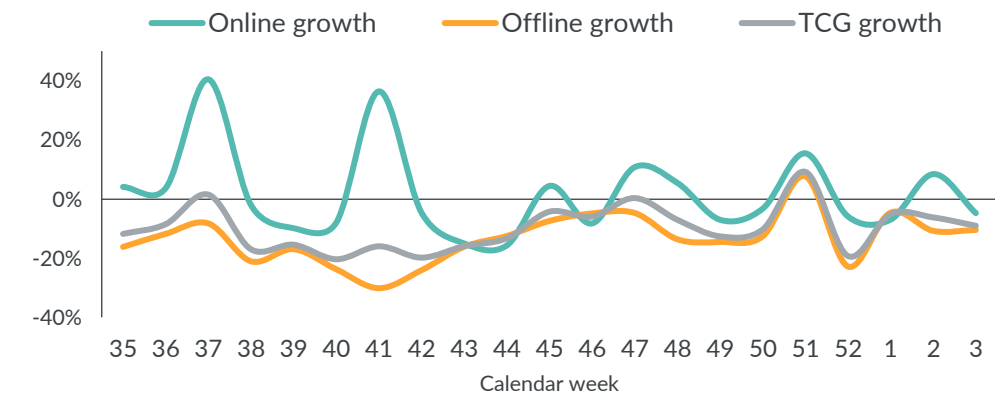
Brazil

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 03 (Jan 16 – Jan 22)



- The total TCG market fell by 9%, driven by traditional retail posting -10% in week 3 2023. Online sales dropped by 5%, down from +8% in week 2.
- IT/Office products ranged from -6% for laser printers to -27% for inkjet printers and -26% for desk computing. Smartphones experienced an uptick of 3%.
- While CE products lost in double digits (TVs posting -34%), air treatment delivered growth of 50%, followed by vacuum cleaners at +36%. MDAs gained 10% (cooling at +14%, washing machines at +8%). Food preparation slumped at -15% and hot beverage makers lagged at -3%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 03 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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Fact of the week

Germany

Great Britain

France

Italy

➤ Spain

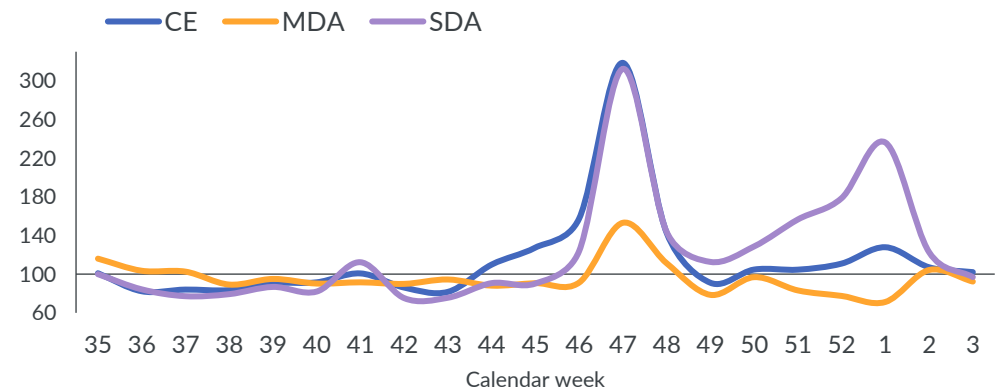
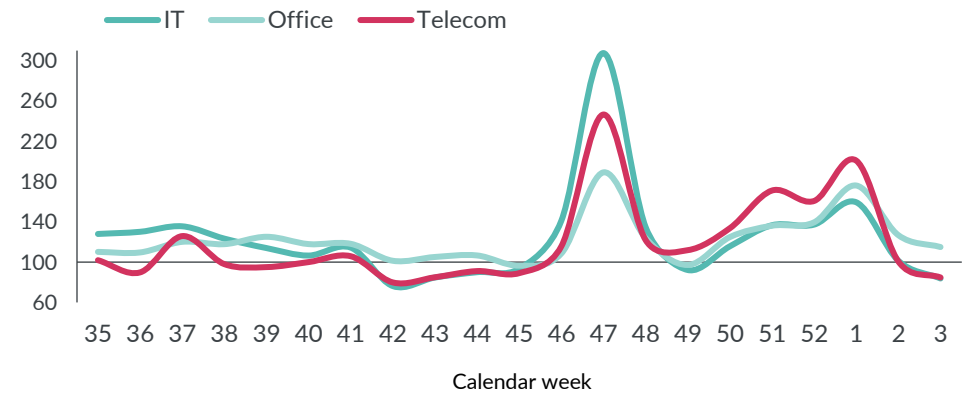
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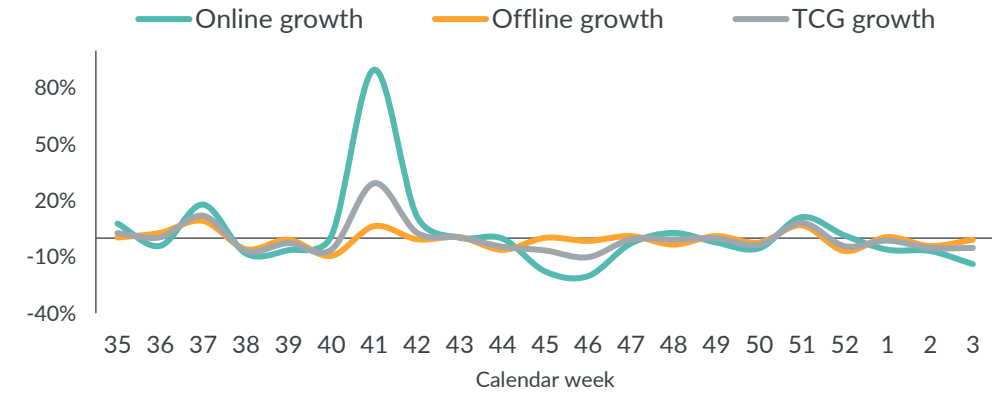
Brazil

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 03 (Jan 16 – Jan 22)



- Online sales experienced a minus of 14% vs week 3 in 2022 and traditional retail was down by -1%, resulting in a downswing of total TCG of 5%.
- Media tablets (-33%) were the worst performing product group among IT/Office products. Desk computing slumped at -21%. Printers gained 4%. Smartphones were flat.
- MDA/SDA/CE products delivered a weak picture with hot beverage makers in the lead at +10% and audio home systems bringing up the rear at -29%. Cooling was flat. Washing machines were the only other category with a positive trend at +2%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 03 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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France

Italy

Spain

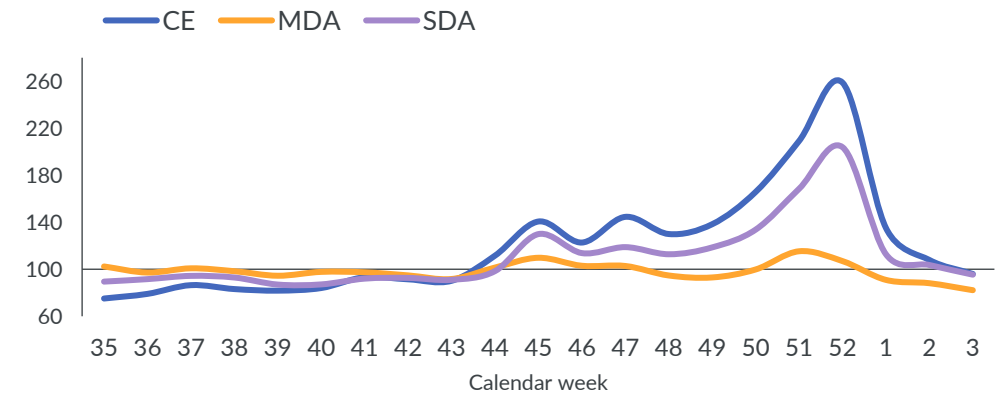
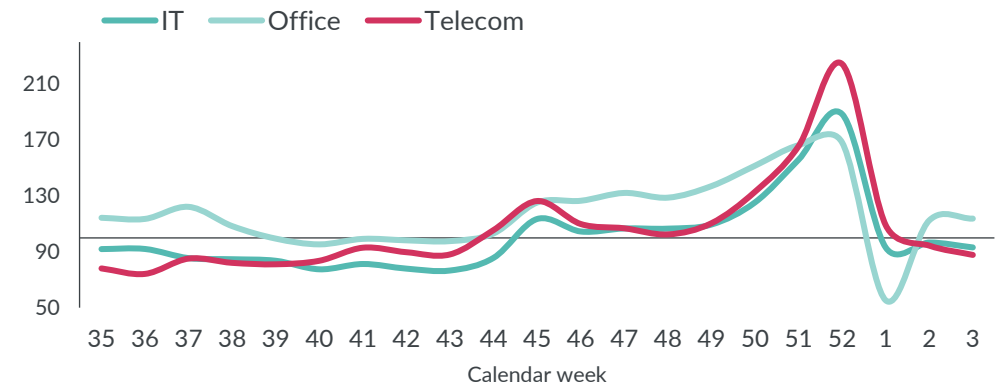
> **Russia**

Japan

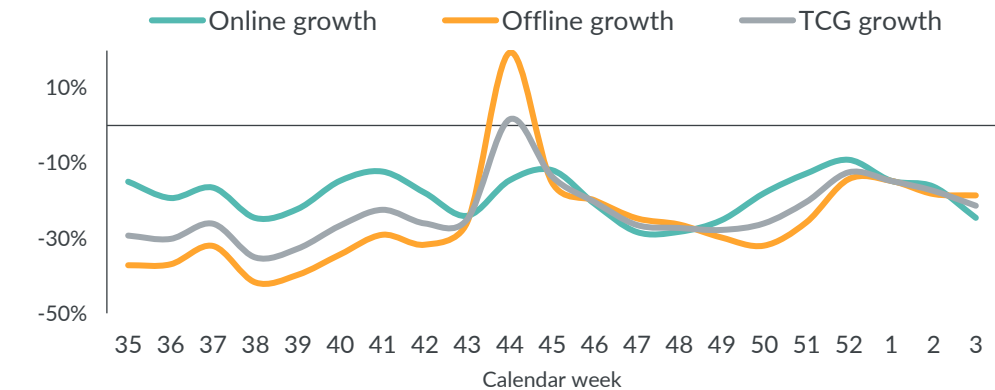
Brazil

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 03 (Jan 16 – Jan 22)



- Both distribution types dropped, online sales at -25% and traditional retail at -19%, leading to a decline for the total TCG market of 21%.
- Monitors posted growth of 8% while most other IT/Office products lost in double digits, led by mobile computing at -31%. Keyboards and mice posted slight decreases of -3%. Smartphones slumped at -33%.
- The overall negative picture for SDA and CE products was led by soundbars at -48%. Cooling posted -2%. Washing machines experienced an uptick of 3%. As in past periods, audio home systems stood out at +110%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 03 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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Italy

Spain

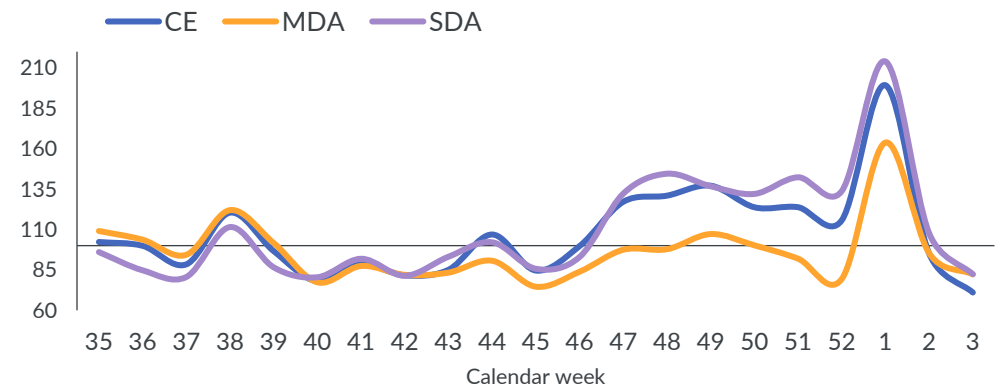
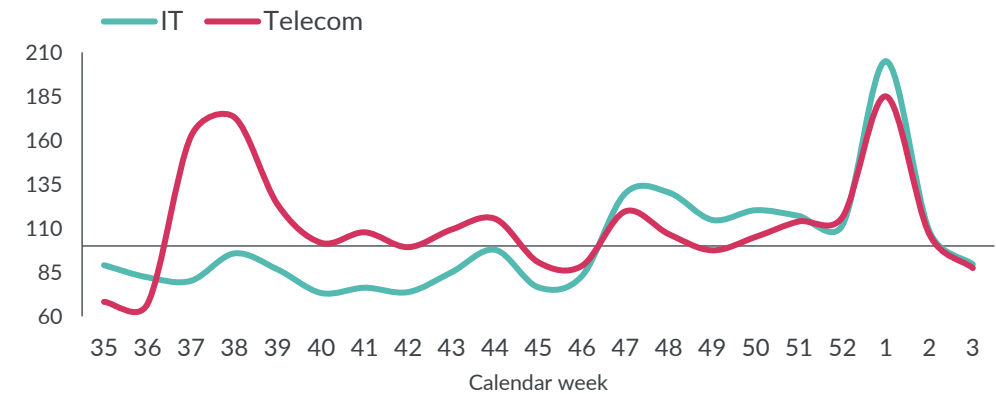
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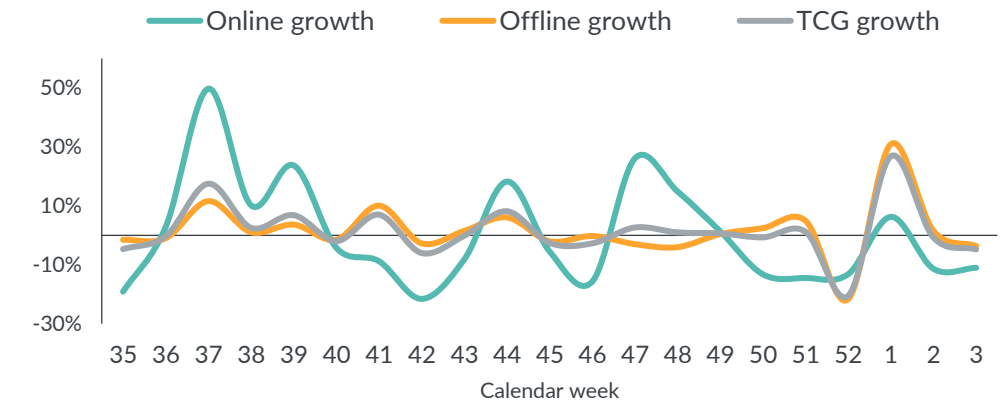
Brazil

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 03 (Jan 16 – Jan 22)



- After a spike at +31% in week 1, traditional retail posted a slight decrease of 4%. Combined with decelerating online sales (-11%) this delivered a downswing of the total TCG market of 5%.
- IT products experienced negative trends with media tablets at -9% and mobile computing at -3%. Smartphones posted +11% and headsets were up 8%.
- The driver of this development was air treatment at -37%. With the exception of dental care at +8%, cooling at +2% and shavers which were flat, all other MDA/SDA/CE products witnessed negative trends.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 03 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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Fact of the week

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Italy

Spain

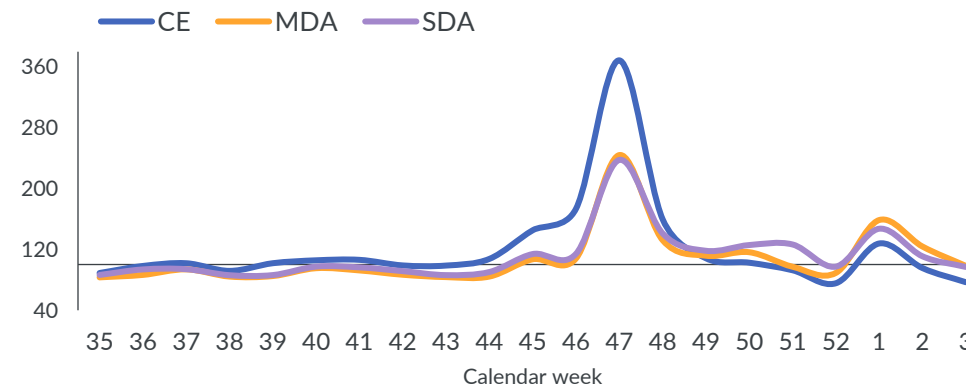
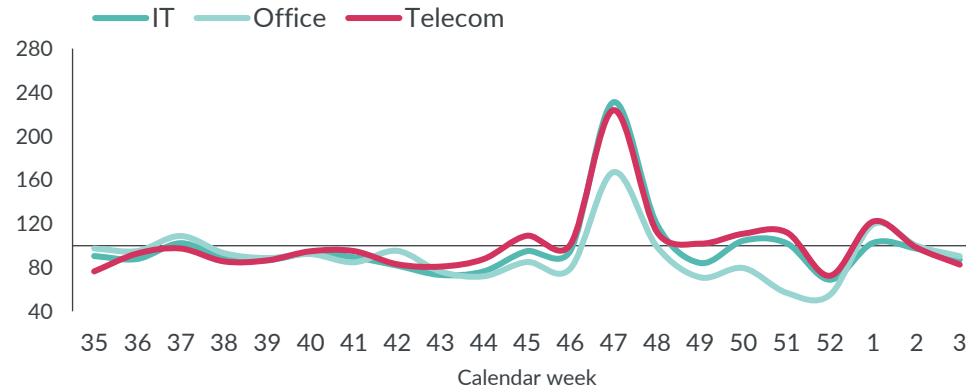
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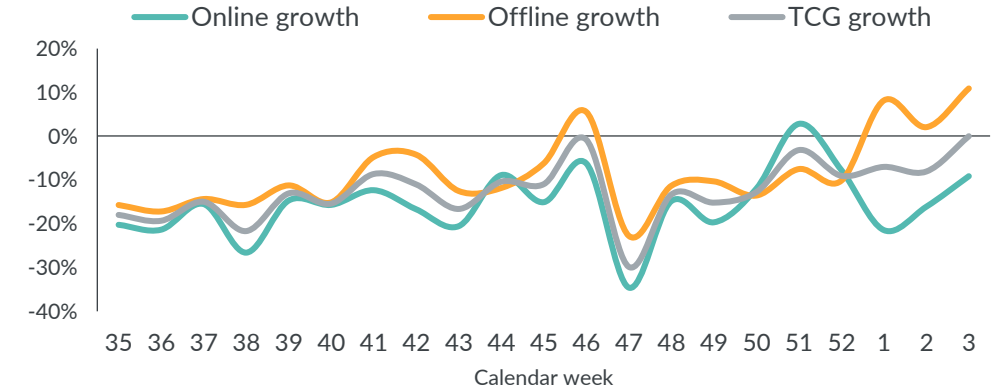
➤ Brazil

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 03 (Jan 16 – Jan 22)



- A less negative result for online sales (-9%) combined with acceleration of traditional retail (+11%) delivered a flat total TCG market (0%).
- The rates for IT/Office products ranged from -11% for mobile computing to +4% for inkjet printers. Smartphones lagged at -7%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+30%), shavers (+40%), and washing machines (+14%). TV sales experienced an uplift of 10%. Only audio home systems posted a negative trend (-4%).

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 03 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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Fact of the week

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France

Italy

Spain

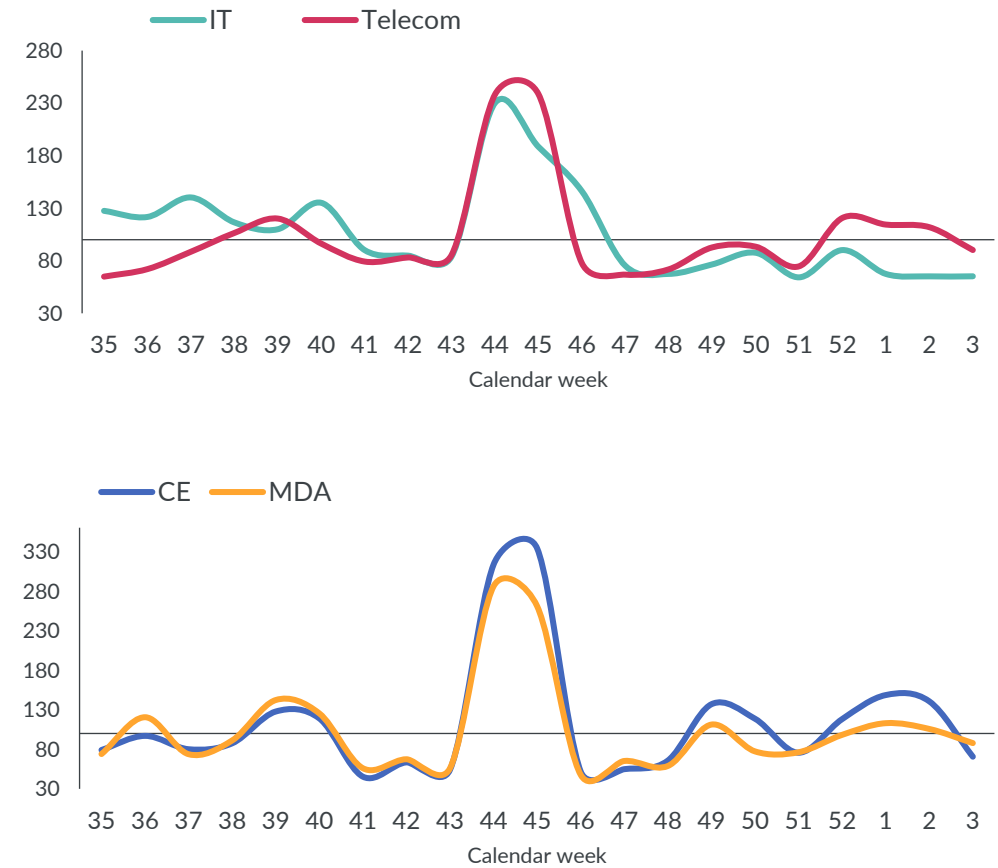
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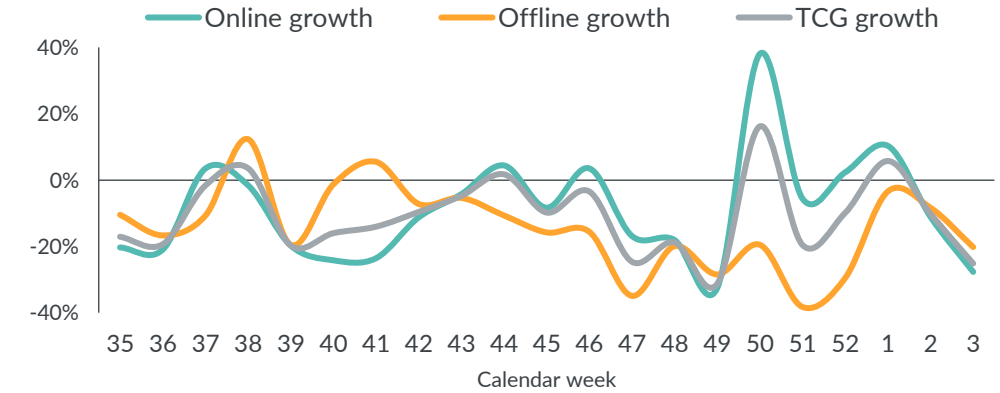
Brazil

> 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 03 (Jan 16 – Jan 22)



- The week before Chinese New Year was marked by strong drops for both, online sales at -28% and traditional retail at -20%, resulting in a downswing of 25% for the total TCG market.
- Mobile PCs decelerated by 18%. Smartphones delivered a minus of 21%.
- The product group hit the most was TVs, plummeting by 57%. Week 3 in 2023 also saw a solid drop for washing machines at -30%. Cooling was less negative at -17%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 03 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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