GfK Growth from Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for the tech and durables market

Edition 143
cw07/2023
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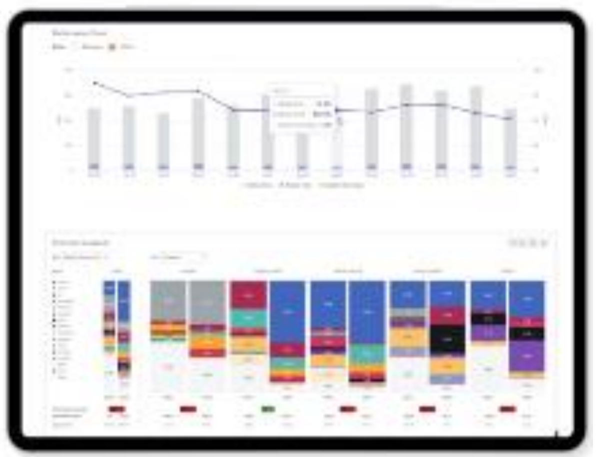

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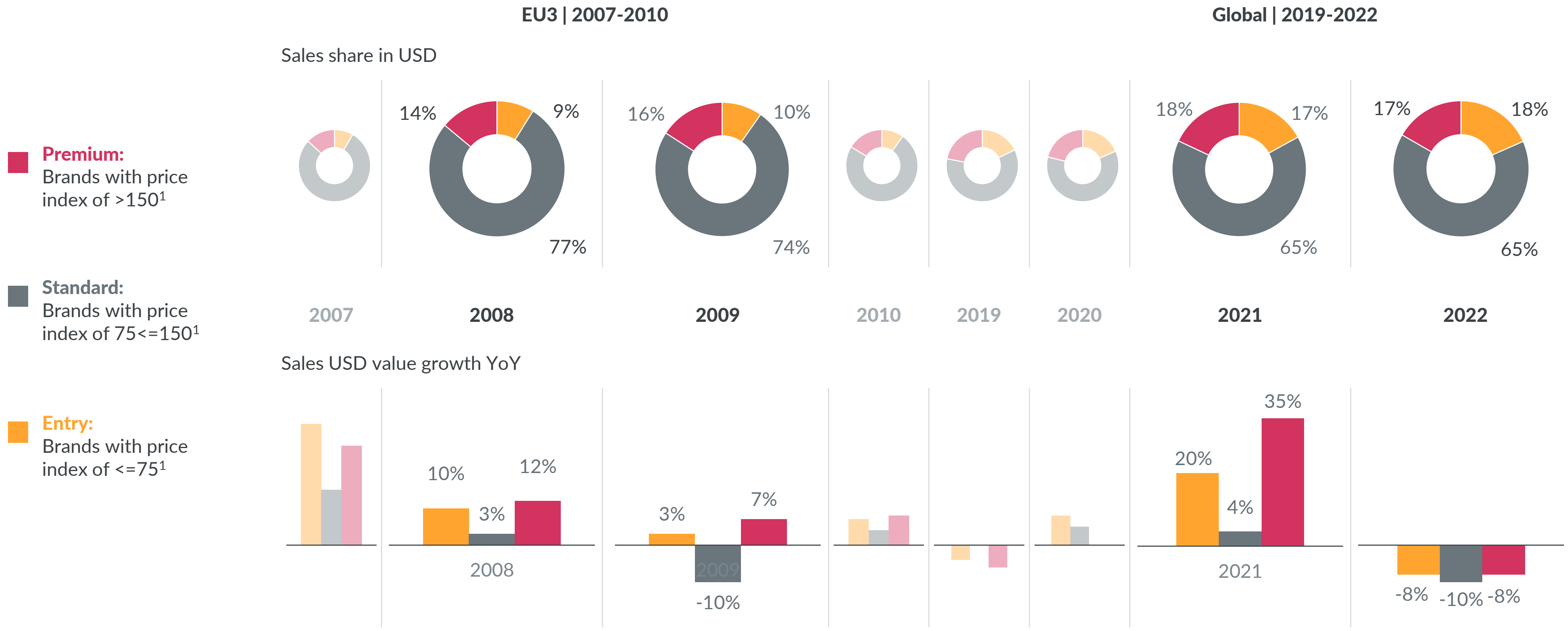
Fact of the week

Continued polarization towards entry and premium brands – mass market stagnates during crisis

Key Technical Consumer Goods product groups



Source: GfK Market Intelligence: Sales Tracking, EU3, USD (NSP) Value & growth 2007 vs 2010, Key Product Groups in tech and durables.

[1] Price Index per brand is aggregated from a country/product group level to use comparable price index information within one country and product group.

Weekly retail insights from the Point of Sale

Spotlight on Germany

About gfknewron

Fact of the week

Germany

Great Britain

France

Italy

Spain

Russia

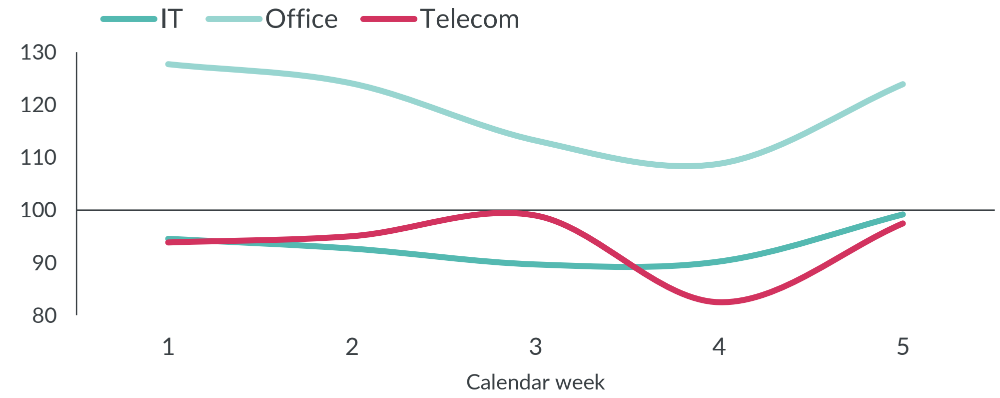
Japan

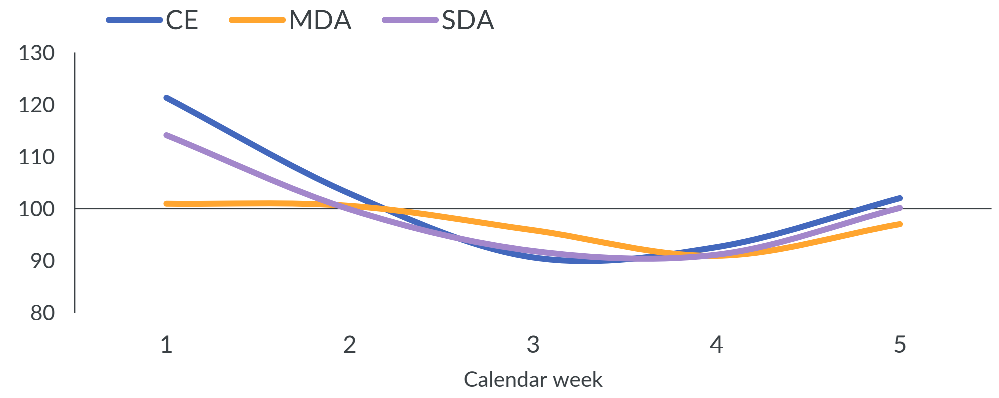
Brazil

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).

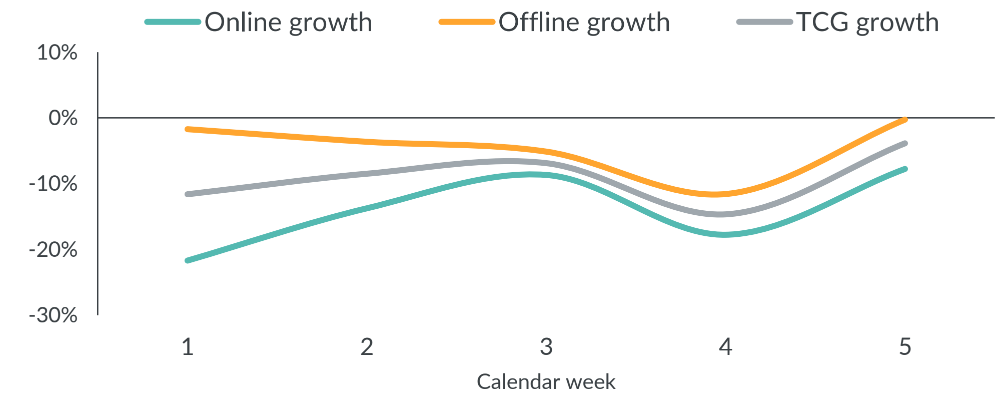
Index: 2022 average weekly turnover in EUR = 100





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 05 (Jan 30 – Feb 05)

- The total TCG market (incl. air treatment) dropped by 4%, driven by online sales at -8%. Traditional retail was flat.
- Except for media tablets at -4%, IT products fell in double digits, led by mobile computing and monitors at -20%. Laser printers were up by 2%. Smartphones accelerated at +5%.
- While soundbars and audio home systems again declined in double-digits, TV sales decreased by just 8%. Dental care was the only positive product group in MDA/SDA/CE products in week 5, at +11%. Newly added air treatment posted the biggest decline at -33%.

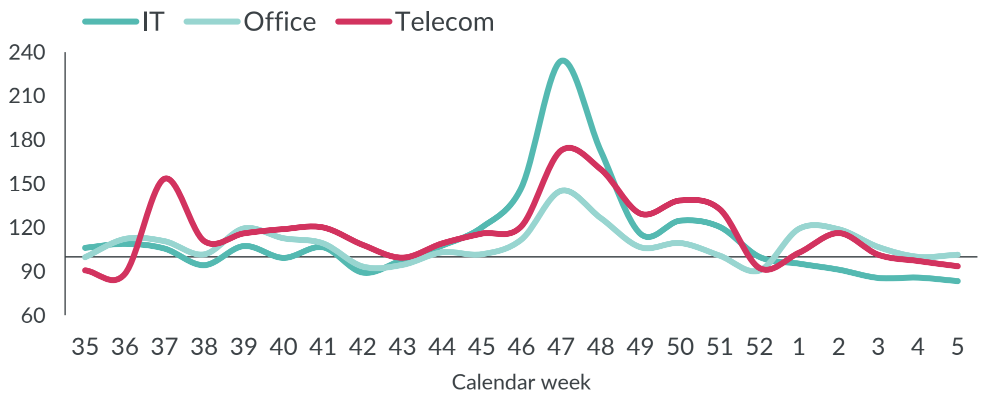
Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 05 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio 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.

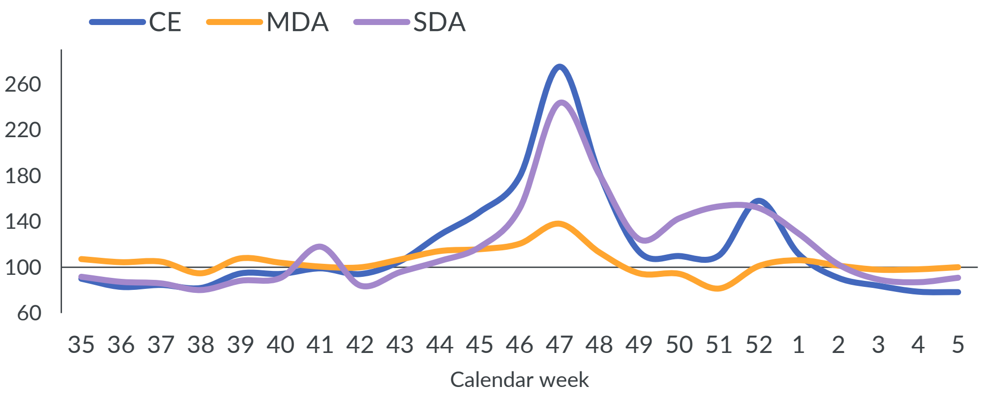
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

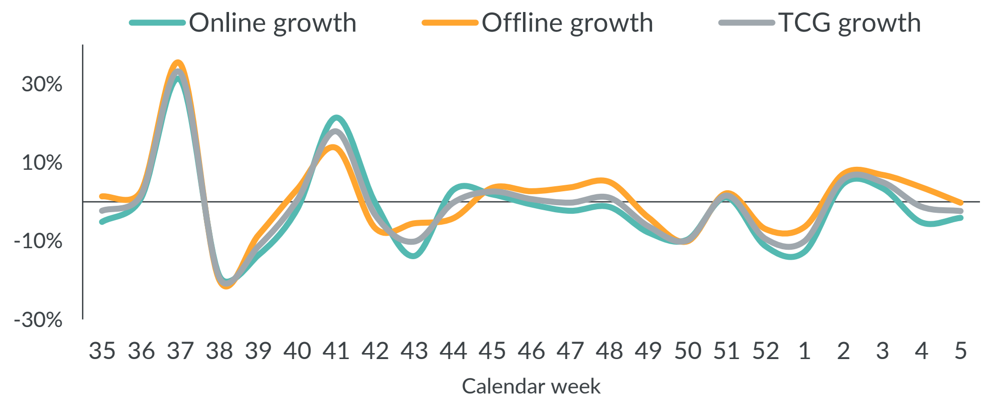
About gfknewron
Fact of the week
Germany
Great Britain
France
Italy
Spain
Russia
Japan
Brazil
China

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 05 (Jan 30 – Feb 05)

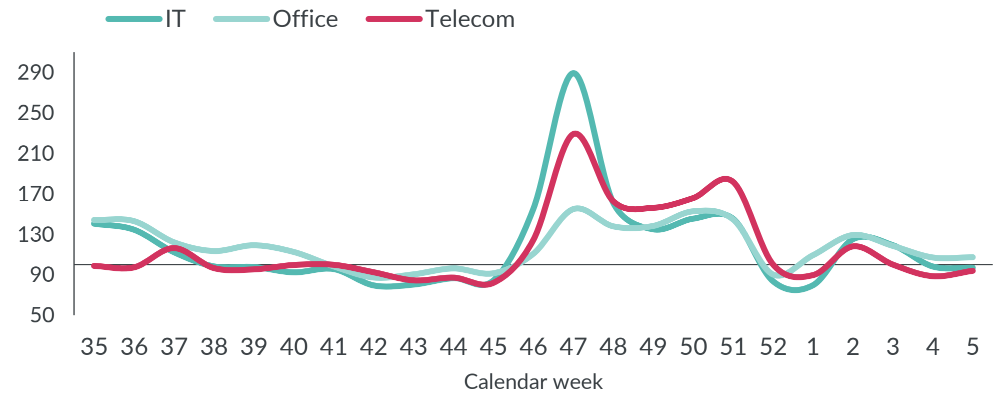
- The deceleration of online sales (-4%) dragged the total TCG market down by 2%. Flat traditional retail was unable to compensate for the losses.
- Laser printers were the best-performing product group in week 5, at +37%. Except for media tablets at +7%, all other IT/Office categories lost in double-digits. Smartphones accelerated at +8%.
- CE products declined in double-digits, too, with TV sales losing 23%. The mixed picture for MDA/SDA categories saw washing machines in the lead (+8%). Cooling and hot beverage makers were stable compared to the same week last year.

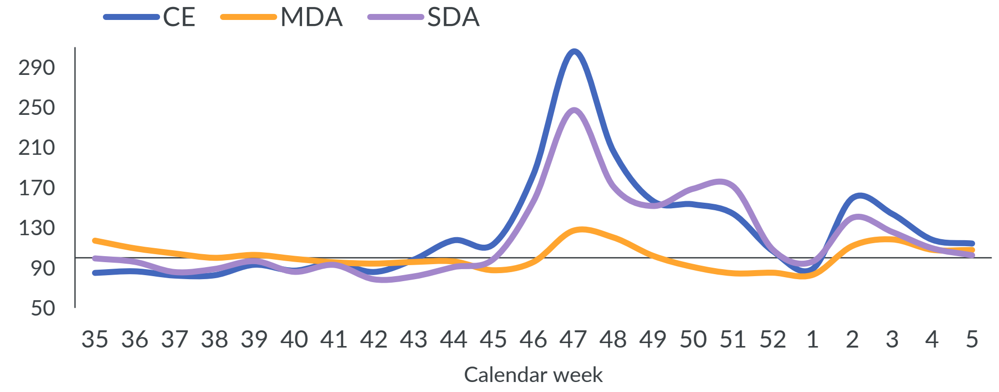
Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 05 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet 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

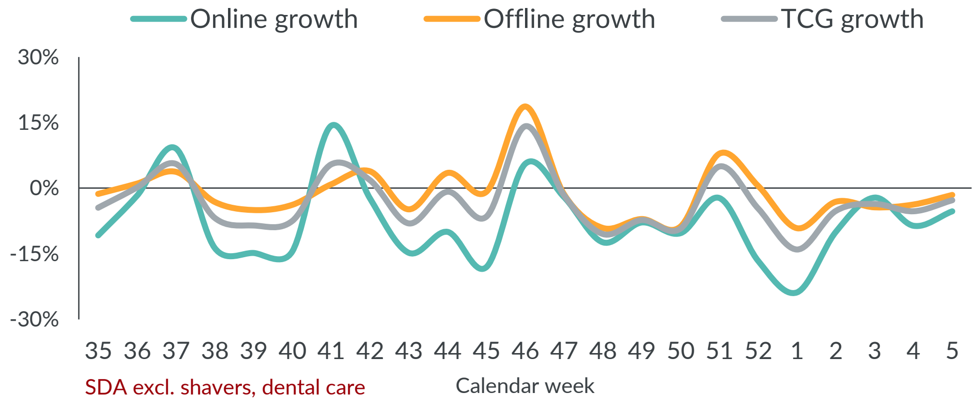
Spotlight on France

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 05 (Jan 30 – Feb 05)

- Online sales delivered -5% (-9% the previous week) and traditional retail was down -2% (-4% the previous week), resulting in a downswing of the total TCG market of -3%.
- IT/Office products posted negative trends, ranging from -6% for mice to -24% for desk computing. Inkjet printers were flat. While smartphones lagged at -5%, headsets were up 7%.
- The mixed picture for MDA/SDA/CE products ranged from -11% for food preparation to +15% for air treatment. Cooling was flat. TV sales lagged at -4%.

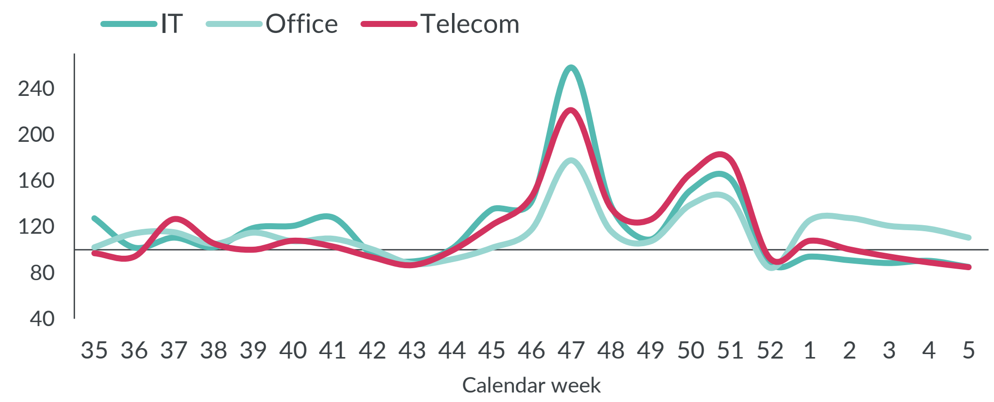
Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 05 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): Air treatment, vacuum cleaners, food preparation, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

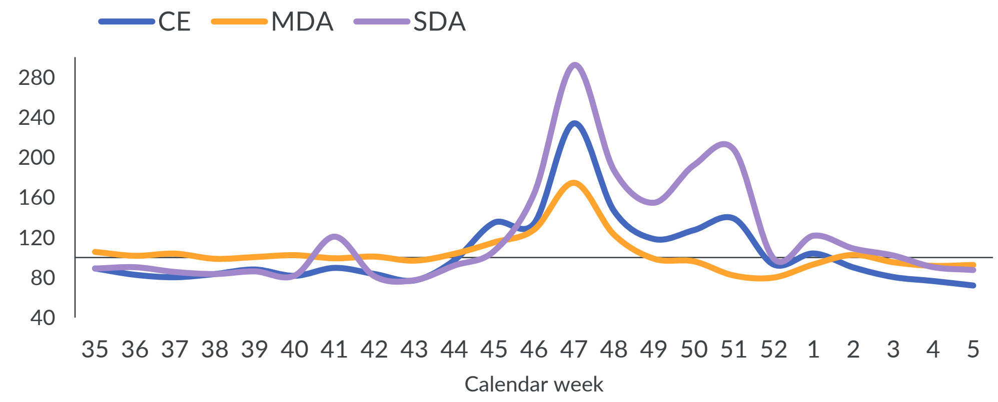
Weekly retail insights from the Point of Sale

Spotlight on Italy

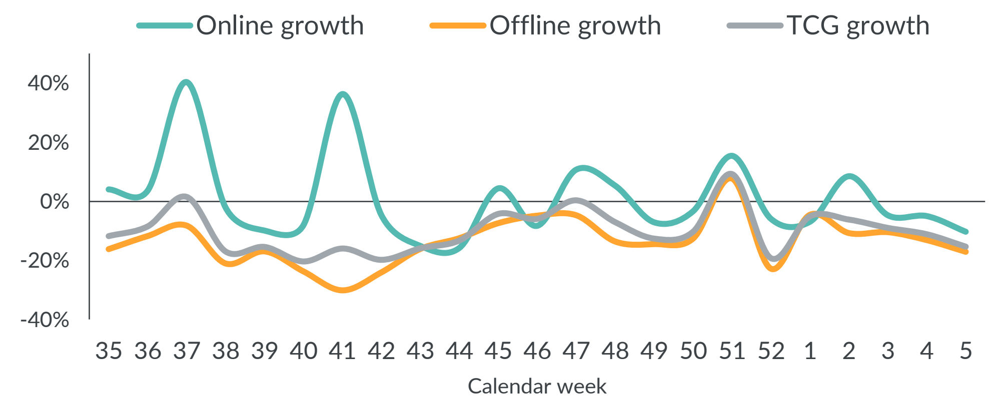
- About gfknewron
- Fact of the week
- Germany
- Great Britain
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

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 05 (Jan 30 – Feb 05)

- The total TCG market fell by 15%, driven by traditional retail posting -17% in week 5 of 2023. Online sales declined by 10%.
- Except for media tablets at -6%, all other IT/Office products decreased in double digits, led by desk computing at -45%. Smartphones lagged at -6%.
- While CE products lost in solid double digits (TVs posting -40%), air treatment delivered growth of 66%. MDAs gained 3% (cooling at +6%, washing machines at +1%). SDA categories delivered a mixed picture, ranging from +10% for vacuum cleaners to -13% for food preparation.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 05 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**

Fact of the week

Germany

Great Britain

France

Italy

Spain

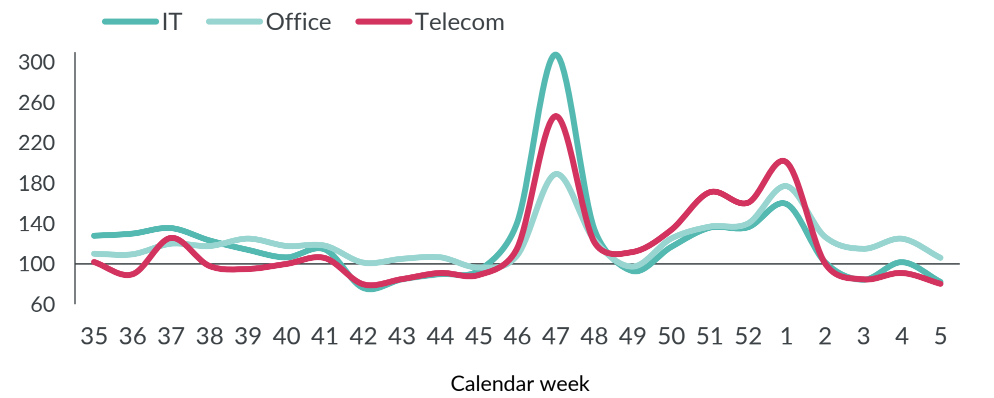
Russia

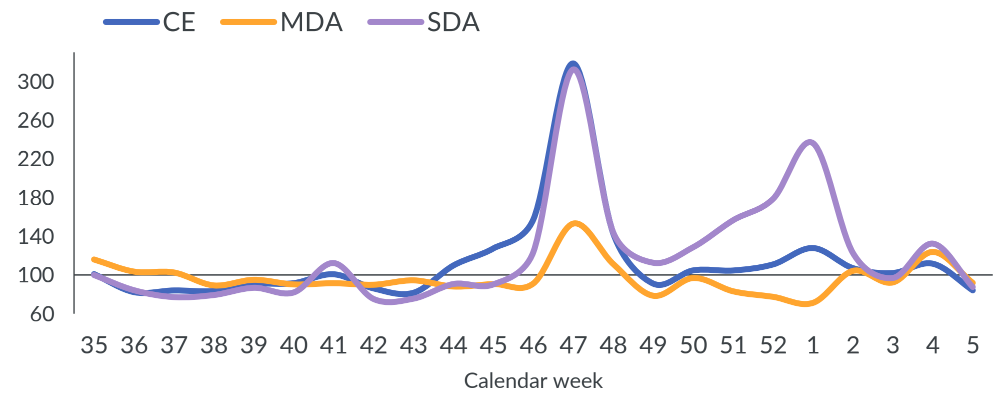
Japan

Brazil

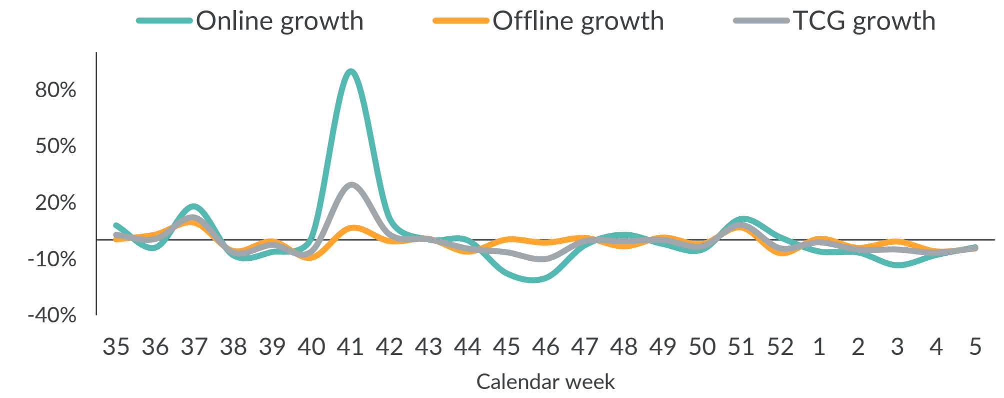
China

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 05 (Jan 30 – Feb 05)

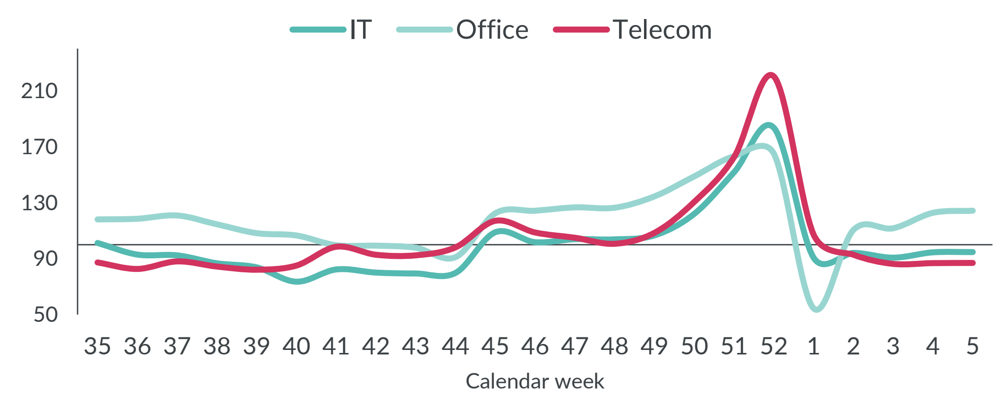
- Traditional retail experienced a minus of 5% vs week 5 in 2022 and online sales were down by 4%, resulting in a downswing of the total TCG market of 4%.
- Desktop computing (-26%) was the worst performing product group among IT/Office products. Inkjet printers and media tablets lagged at -10% and -9% respectively. Laser printers at +6% were the only positive category. Smartphones were down 4%.
- MDA/SDA/CE products posted a mixed picture with cooling in the lead at +9%. Soundbars, audio home systems and vacuum cleaners posted -13%.

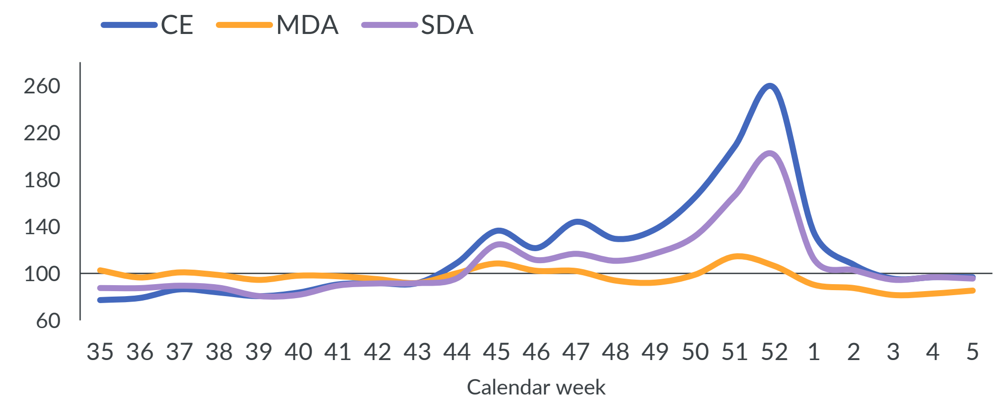
Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 05 2023 (no comparability with 2019); Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (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

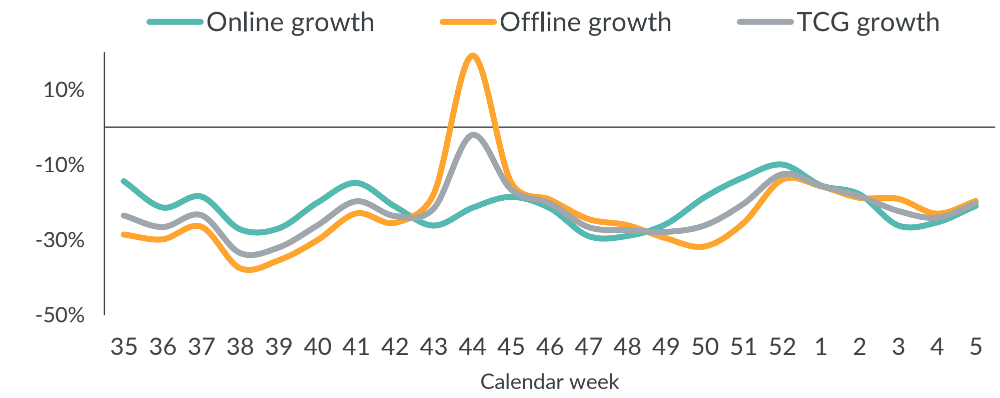
Spotlight on Russia

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 05 (Jan 30 – Feb 05)

- Both distribution types dropped, online sales at -21% and traditional retail at -20%, leading to a decline for the total TCG market of 20%.
- Monitors and laser printers posted growth of 5% and 4% respectively while most other IT/Office products lost in double digits, led by media tablets at -38%. Keyboards and mice posted slight decreases of -2% and -4%. Smartphones slumped at -32%.
- The overall negative picture for SDA and CE products was led by soundbars at -51%. Cooling posted +2%. Washing machines experienced an uptick of 6%. As in past periods, audio home systems stood out at +101%.

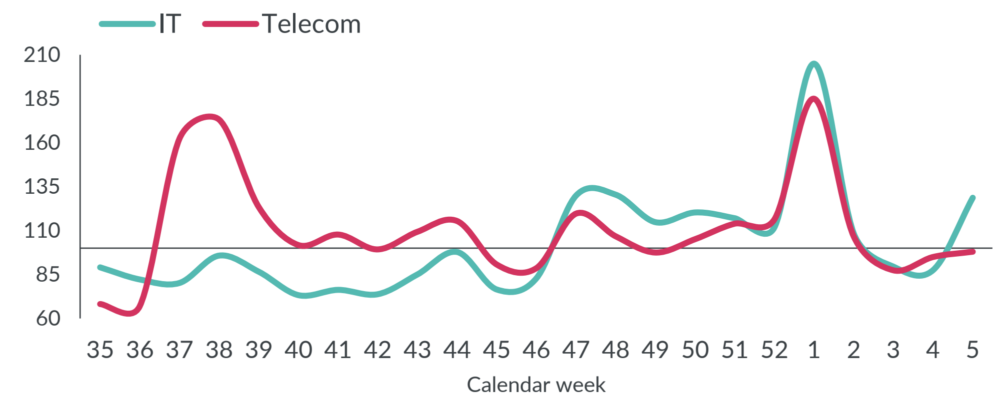
Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 05 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines - Small domestic appliances (SDA): Air treatment, vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

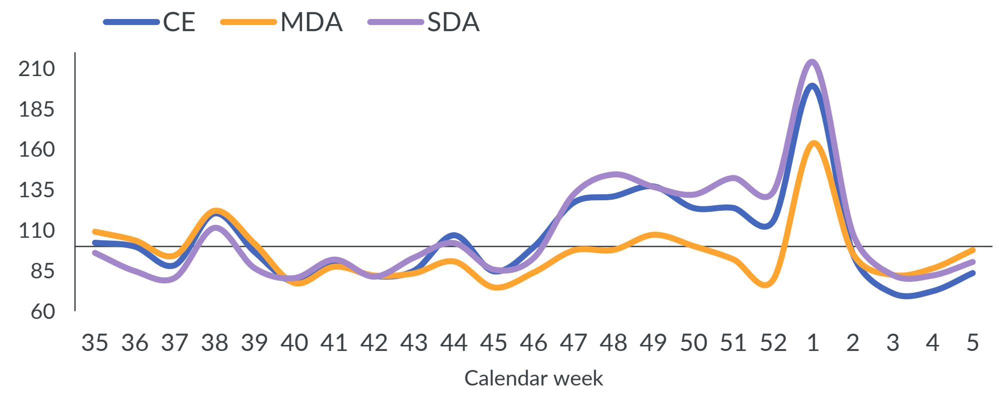
Weekly retail insights from the Point of Sale

Spotlight on Japan

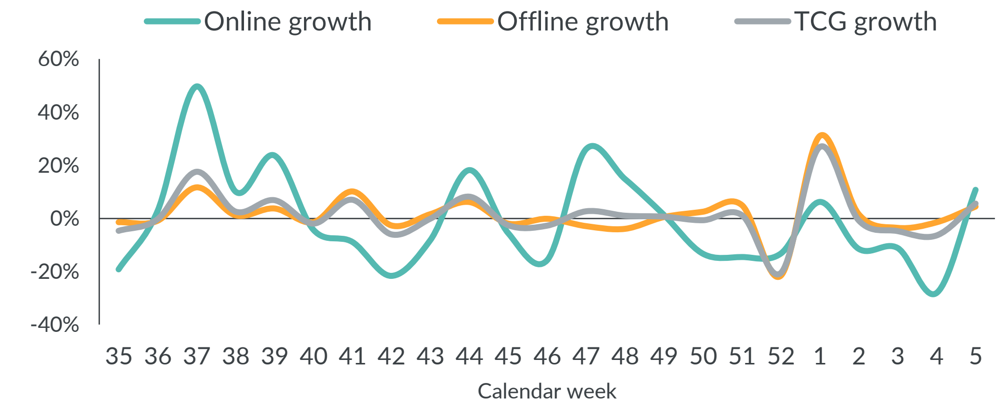
- About gfknewron
- Fact of the week
- Germany
- Great Britain
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

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 05 (Jan 30 – Feb 05)

- Online sales strongly recovered from -28% in week 4 to +11% in week 5. At the same time, traditional retail put on a recovery at +4% which led to an upswing of the total TCG market of 6%.
- The drivers of this development were media tablets at +63%. Mobile computing posted +17%. Smartphones delivered +21%.
- While CE products witnessed negative trends with TVs posting -14%, MDAs were positive at +7%. The mixed picture for SDA categories was led by shavers at +17% and air treatment bringing up the rear at -33%.

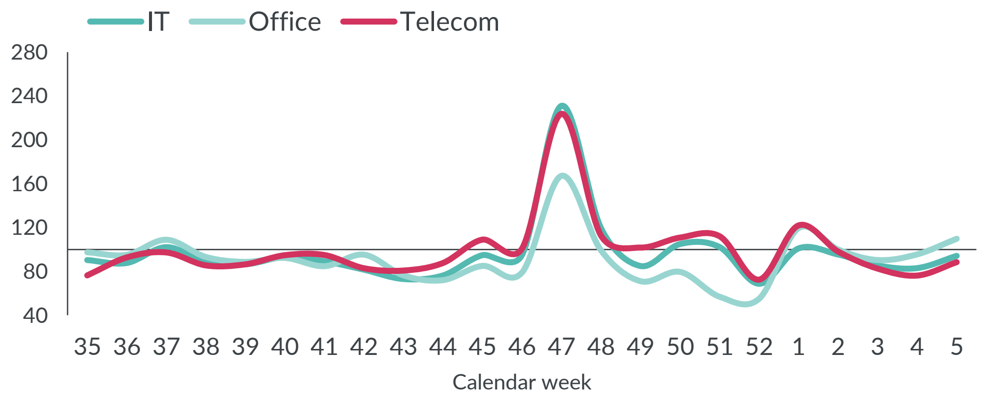
Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 05 2023; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile computing, media tablets – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and 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

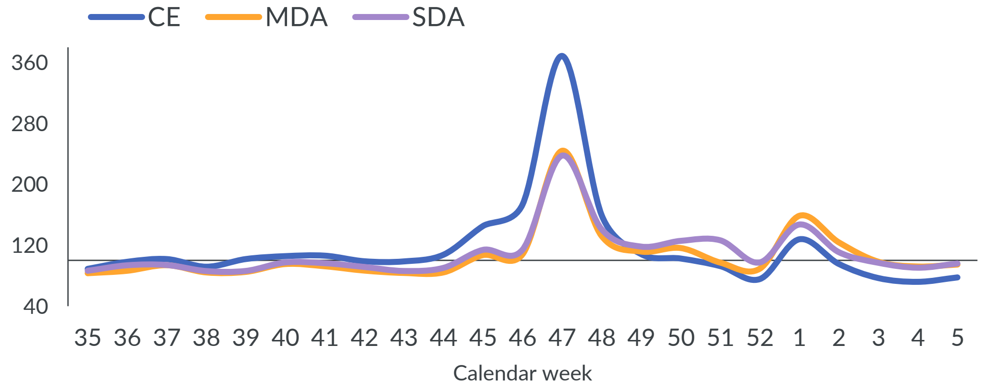
Weekly retail insights from the Point of Sale

Spotlight on Brazil

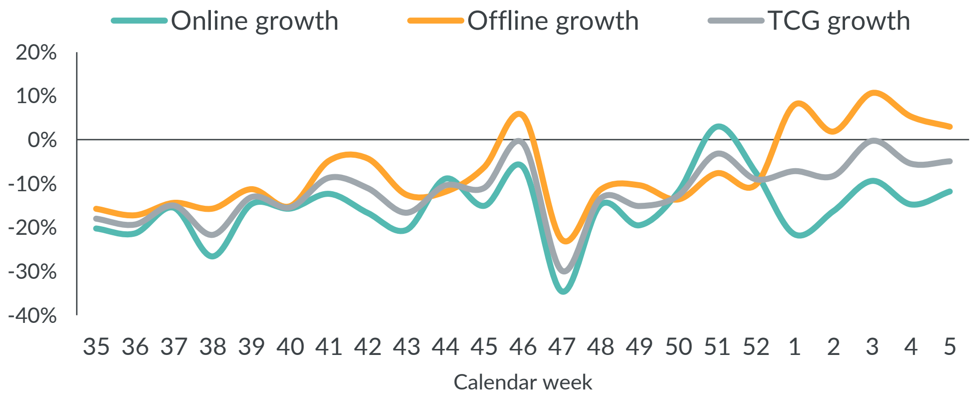
- About **gfknewron**
- Fact of the week
- Germany
- Great Britain
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

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 05 (Jan 30 – Feb 05)

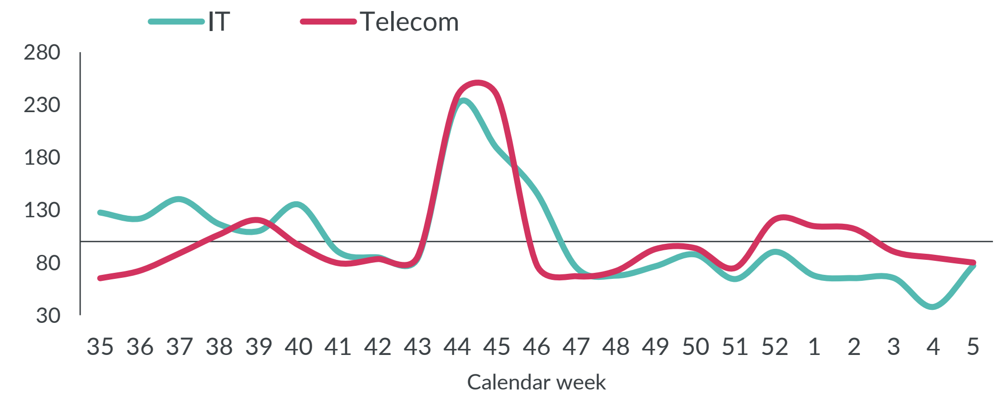
- Traditional retail experienced a plus of 3% vs week 5 in 2022, but this failed to compensate for the losses of online sales (-12%) and left total TCG at a minus of 5%.
- The rates for IT/Office products ranged from -19% for mobile computing to +12% for media tablets. Smartphones lagged at -9%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+23%) and shavers (+20%). TV sales experienced an uplift of 3%. Audio home systems (-15%), food preparation and vacuum cleaners (-1% each) posted negatives trends.

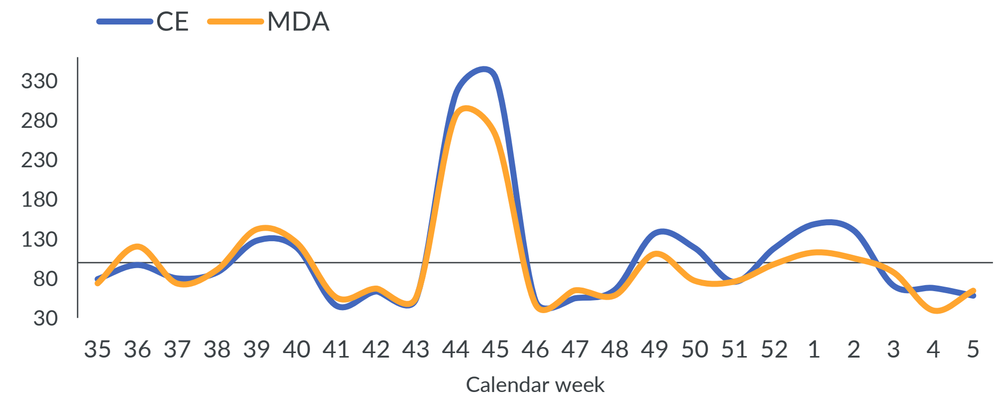
Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 05 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

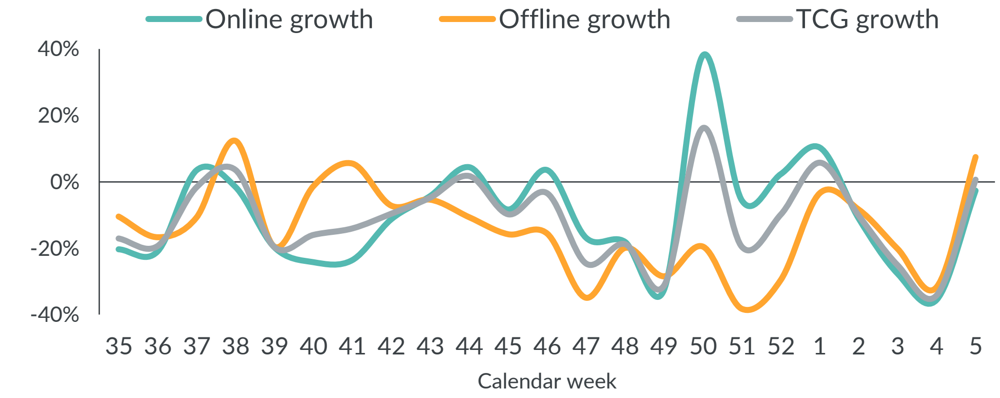
Spotlight on China

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 05 (Jan 30 – Feb 05)

- A strong recovery of traditional retail at +7% (up from -32% in week 4) led to an uptick for total TCG of 1% as it converged with online sales at -3% which was less negative than in week 4 (-36%).
- Mobile PCs accelerated at 76%. Smartphones delivered a minus of 13%.
- Week 5 in 2023 saw solid increases for TV sales (+22%), washing machines (+36%) and overall cooling at +40%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 05 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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