



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 144

cw08/2023

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Get quick, easy and comprehensive access to your business intelligence



> About **gfknewron**

Fact of the week

Germany

Great Britain

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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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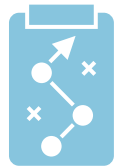
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Fact of the Week

More consumers are looking for performance upgrades when buying a new product



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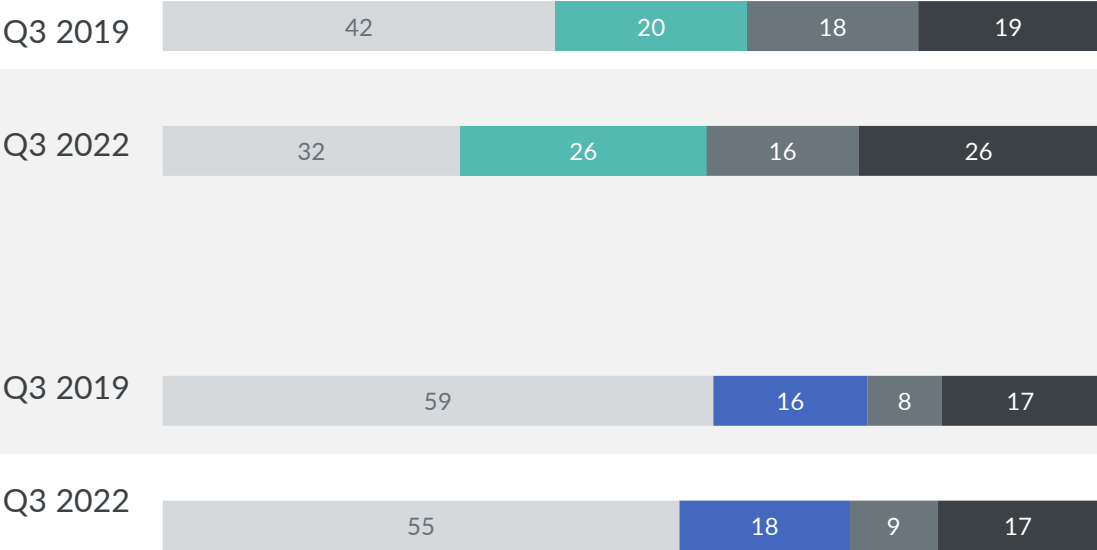
China

High performance
Products that offer an upgrade and deliver a rich experience



Initial trigger reason for purchasing a new product

- Replace a faulty product
- Upgrade a working product
- Get an additional product



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

Italy

Spain

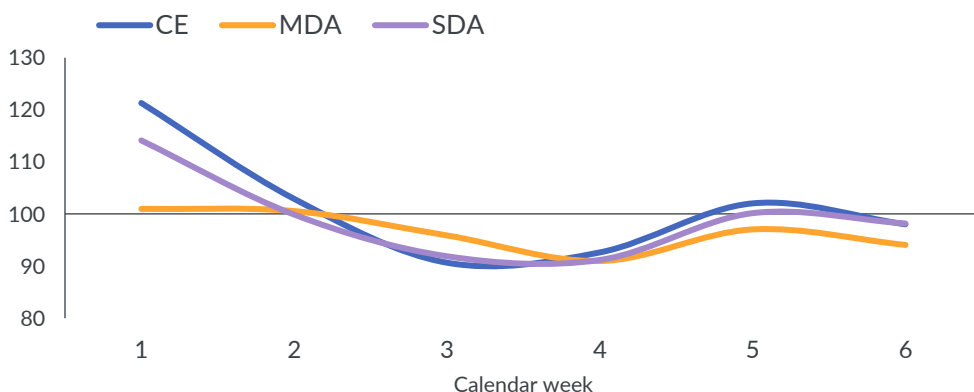
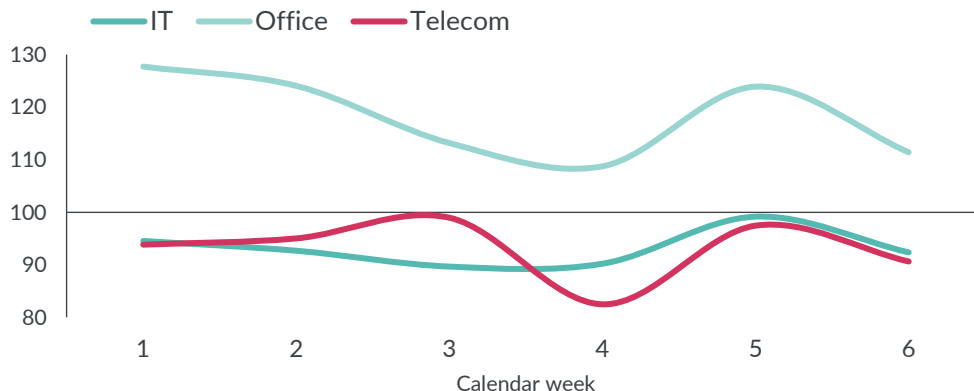
Russia

Japan

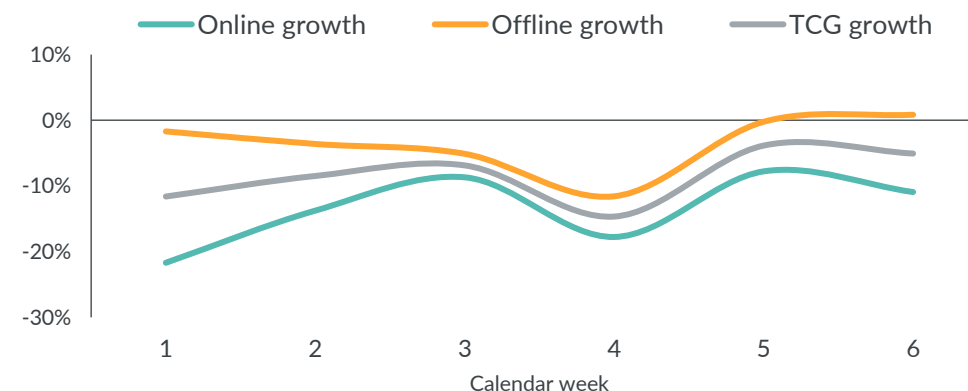
Brazil

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 06 (Feb 06 – Feb 12)



- The total TCG market (including air treatment) dropped by 5%, driven by online sales at -11%. Traditional retail was nearly flat at +1%.
- All IT products fell in double digits led by media tablets at -28%. Laser printers accelerated at 15%. Smartphones were up 2%.
- While audio home systems recovered (+4%), TV sales and soundbars decreased by 6% and 10% respectively. Growth within MDA/SDA products was led by vacuum cleaners at +13%. Air treatment posted the biggest decline at -51%. Hot beverage makers and dental care were flat.

Weekly retail insights from the Point of Sale

Spotlight on Great Britain



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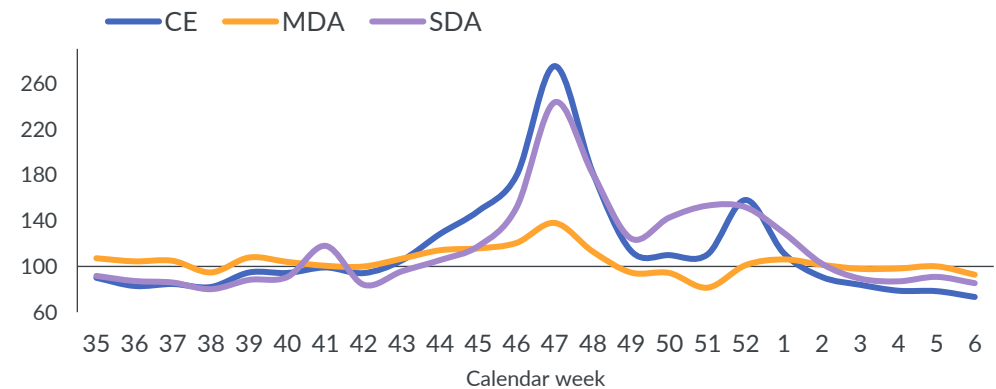
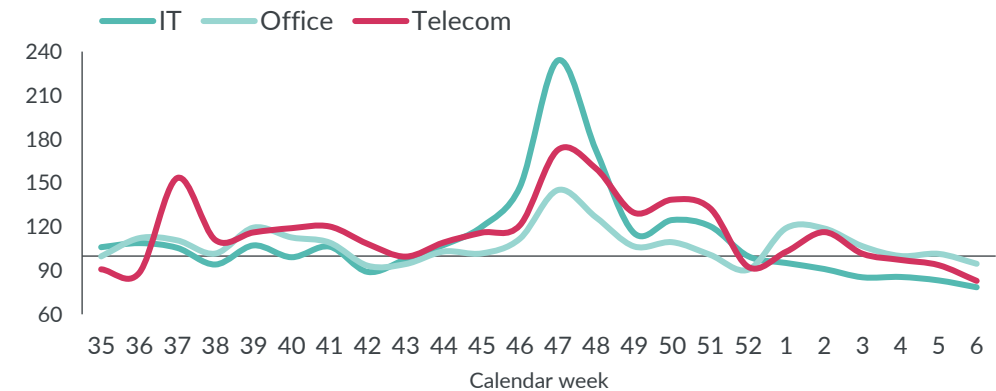
Russia

Japan

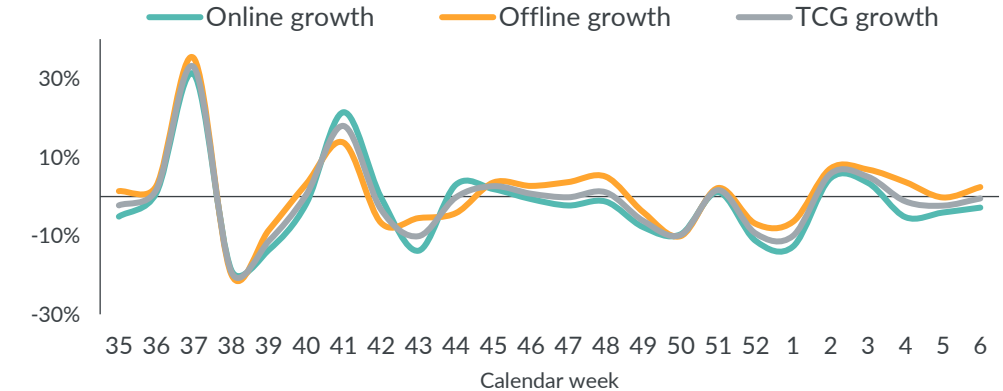
Brazil

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 06 (Feb 06 – Feb 12)



- Growth of traditional retail of 2% was unable to compensate for the losses of online sales (-3%), which dragged the total TCG market down by 1%.
- Monitors, keyboards, desk computing, media tablets and inkjet printers lost in double digits, while all other IT/Office products were less negative. Smartphones accelerated at +15% and headsets were up 7%.
- CE products declined in double digits, with TV sales losing 20%. The mixed picture for MDA/SDA categories saw washing machines in the lead (+7%) and food preparation bringing up the rear (-7%).

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 06 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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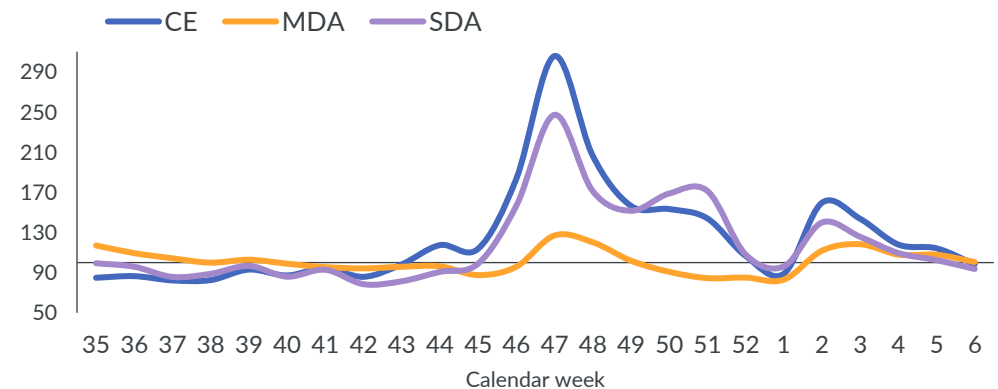
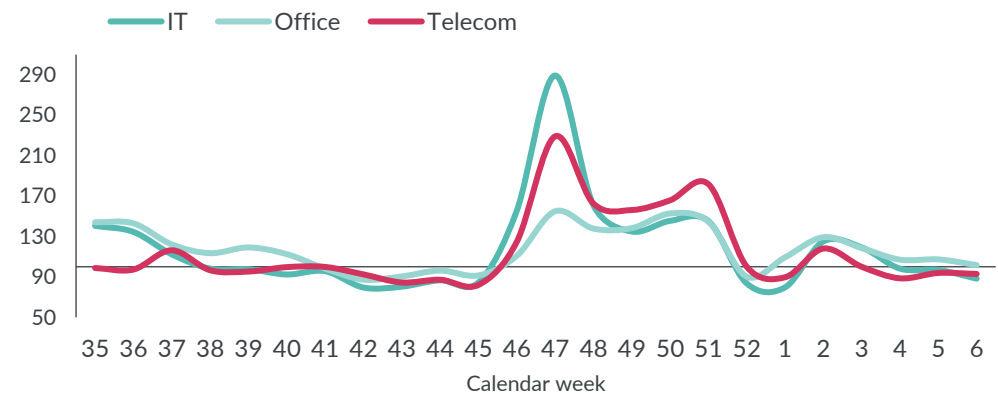
Russia

Japan

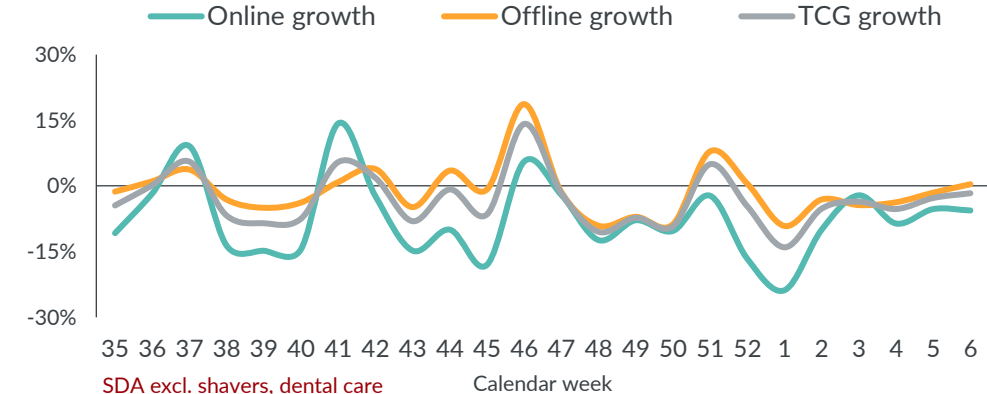
Brazil

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 06 (Feb 06 – Feb 12)



- Online sales delivered -6%, but flat traditional retail failed to convert the total TCG market to positive growth, leaving it at -2%.
- All IT/Office products posted negative trends, ranging from -2% for inkjet printers to -33% for desk computing. Smartphones and headsets accelerated at +7% and +8% respectively.
- The mixed picture for MDA/SDA products ranged from -10% for food preparation to +19% for air treatment. Cooling was flat at +0.7%. CE products declined. Audio home systems led the negative scores at -19%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 06 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, 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



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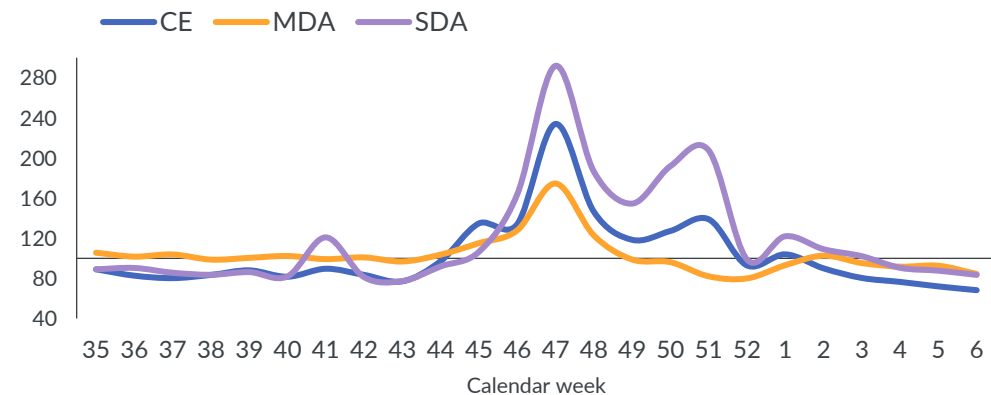
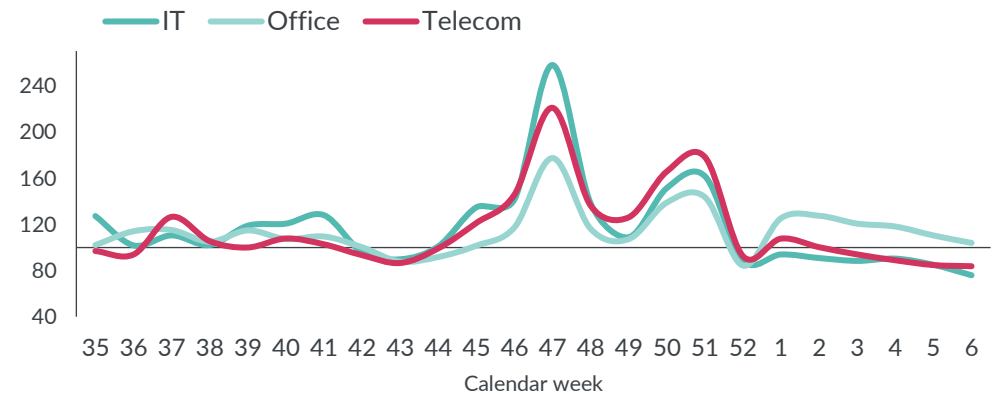
Russia

Japan

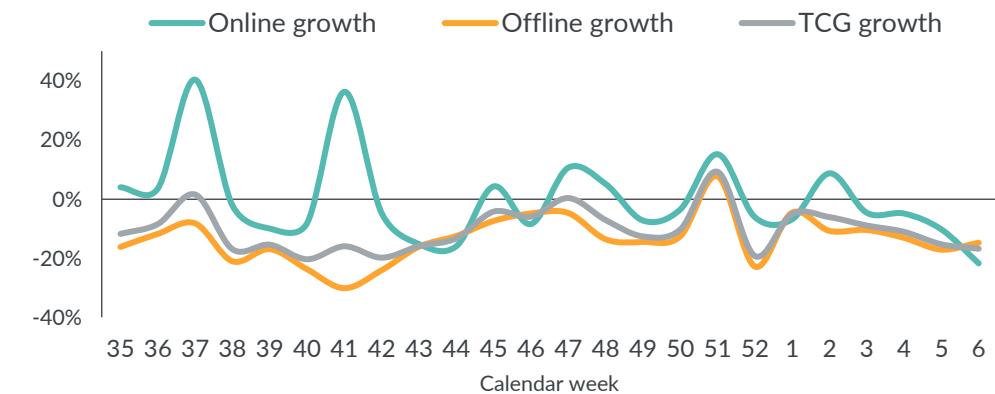
Brazil

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 06 (Feb 06 - Feb 12)



- The total TCG market fell by 17%, driven by online sales posting -22% in week 6 2023. Traditional retail declined by 15%.
- There were strong drops for all IT/Office and telecom categories with smartphones hit the least at -13%.
- TVs posted -36% as an effect of the switch-off and high sales since autumn 2021. Other CE products lost in solid double digits, too. Air treatment delivered growth of 58%. Other SDA categories showed a mixed picture, ranging from +16% for vacuum cleaners to -11% for dental care. Cooling gained 9%, washing machines were flat.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 06 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



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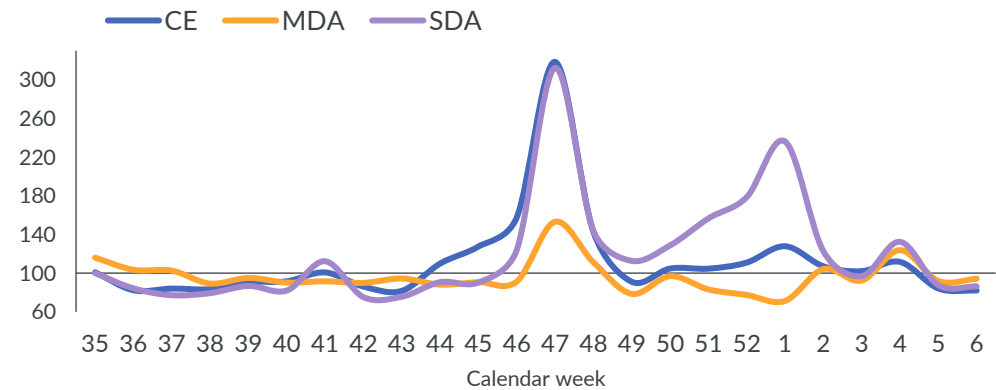
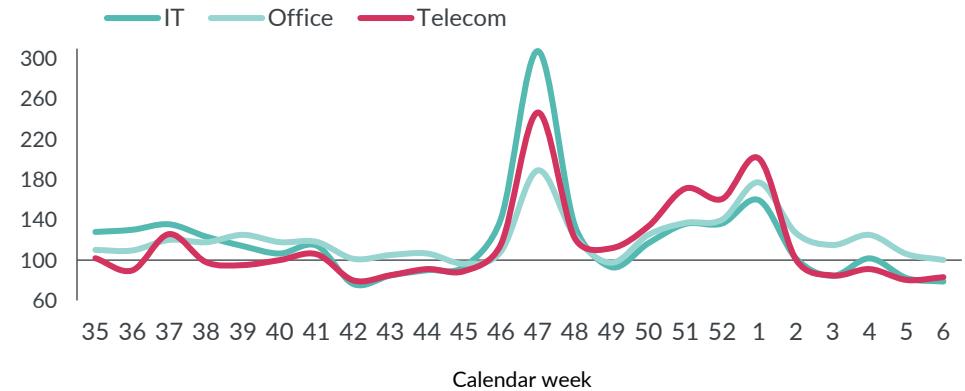
Russia

Japan

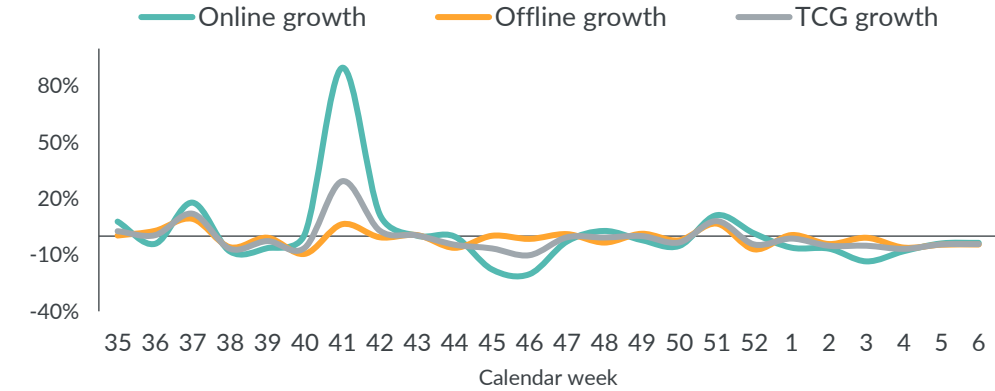
Brazil

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 06 (Feb 06 - Feb 12)



- At an identical rate of -4%, both traditional retail and online sales dragged the total TCG market down by -4% in week 6 2023.
- Desktop computing (-30%) was the worst-performing product group among IT/Office products. Mobile computing and media tablets lagged at -17% and -13% respectively. Laser printers at +31% were the highlight. Smartphones were down 3%.
- MDA/SDA/CE products posted a mixed picture with hot beverage makers in the lead at +17%. Audio home systems slumped at -25%. TVs lagged at -8%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 06 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

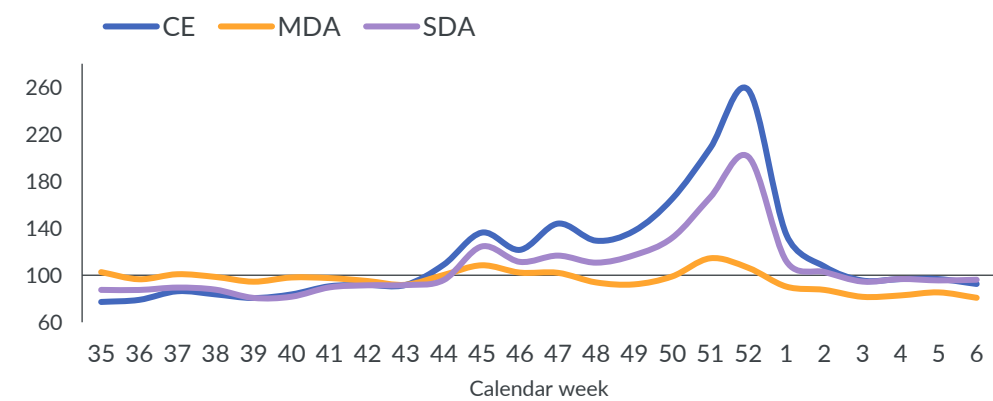
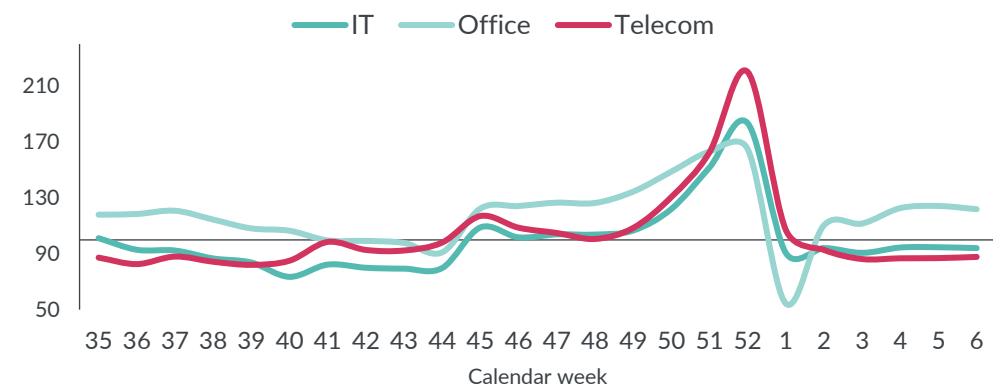
Weekly retail insights from the Point of Sale

Spotlight on Russia

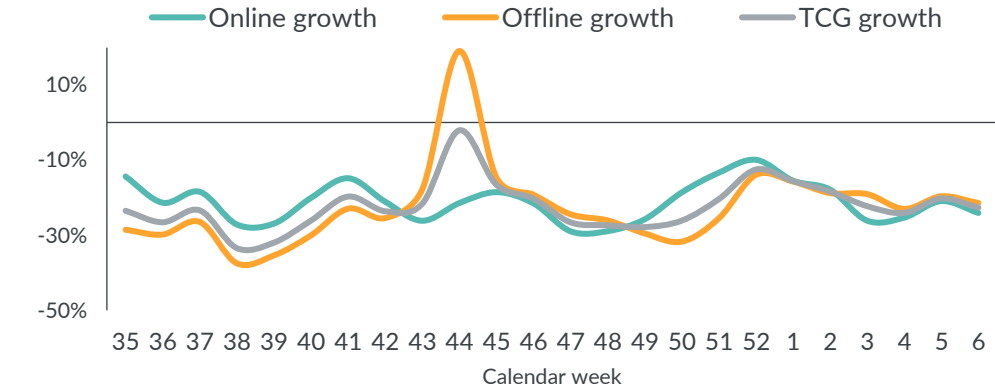


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 06 (Feb 06 - Feb 12)



- Both distribution types dropped, online sales at -24% and traditional retail at -21%, leading to a decline for the total TCG market of 23%.
- Monitors and laser printers posted growth of 13% and 12% respectively while most other IT/Office products lost in double digits, led by media tablets at -32%. Mice posted a slight decrease of -0.8%. Smartphones slumped at -37%.
- The overall negative picture for SDA and CE products was led by soundbars at -44%. Cooling posted +1%. Washing machines experienced an uptick of 8%. As in past periods, audio home systems stood out at +99%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 06 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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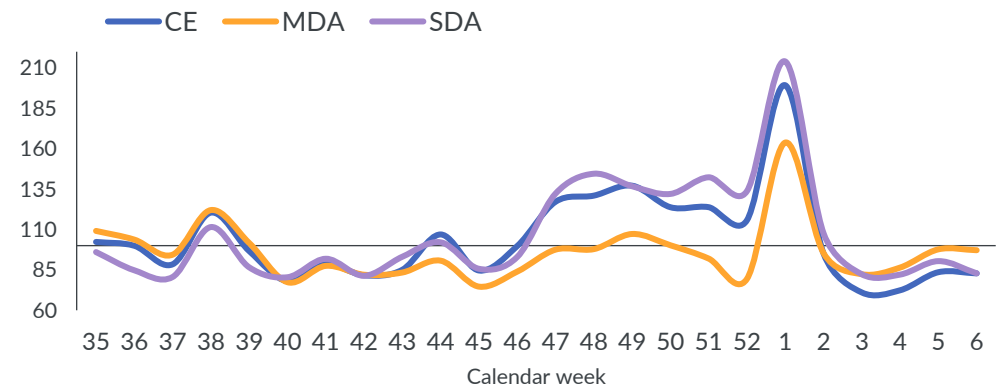
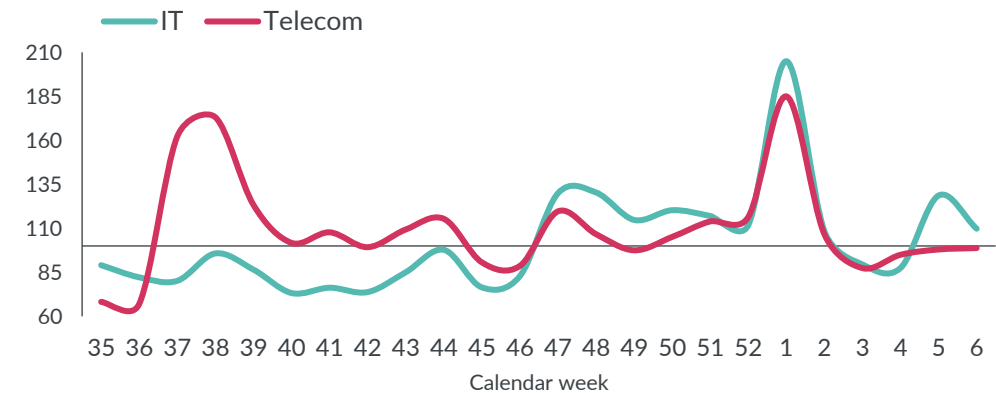
Russia

➤ Japan

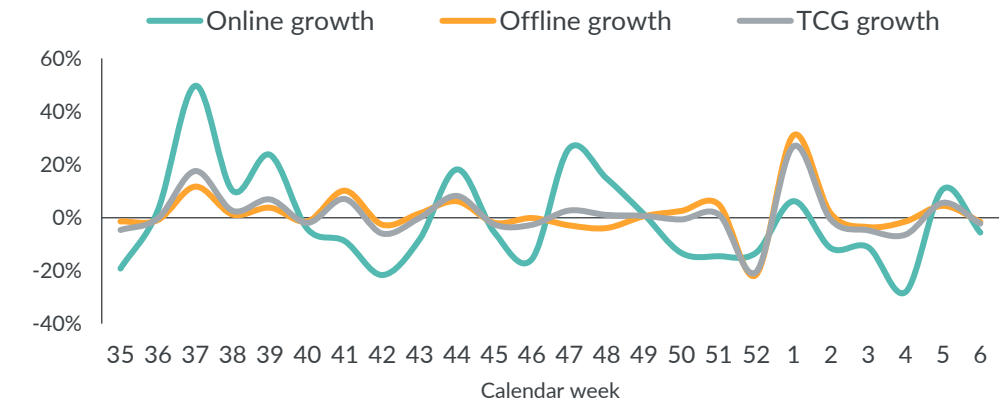
Brazil

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 06 (Feb 06 - Feb 12)



- Online sales dropped by 6% (down from +11% in week 5). Weak traditional retail (-2%) added to the decline of the total TCG market of 2%.
- The only negative trend came from headsets at -5%. Media tablets were up 11%. The driver of this development was media tablets at +63%. Mobile computing posted +17%. Smartphones delivered +21%.
- CE products witnessed negative trends with TVs posting -16%. Except for hot beverage makers at +12% and flat dental care, SDA categories were down as well, with air treatment in the lead at -36%. Cooling at +8% performed better than washing machines at -3%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 06 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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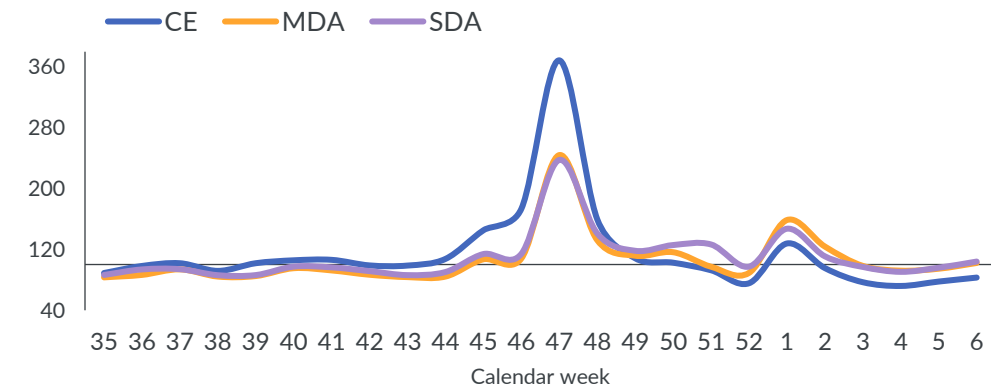
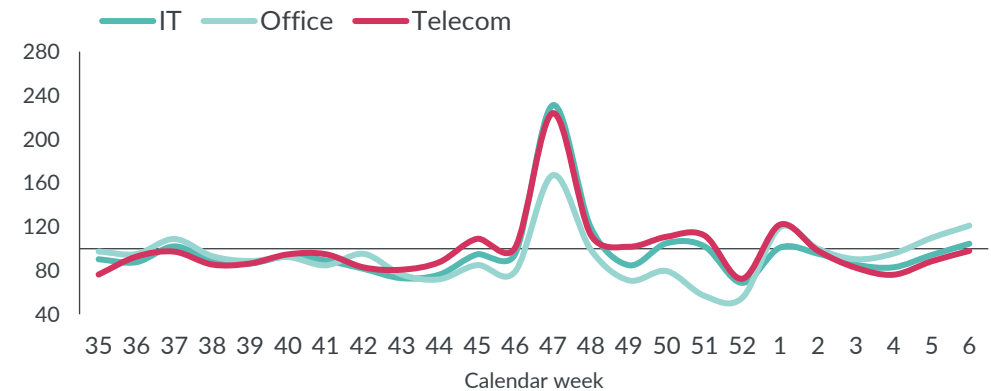
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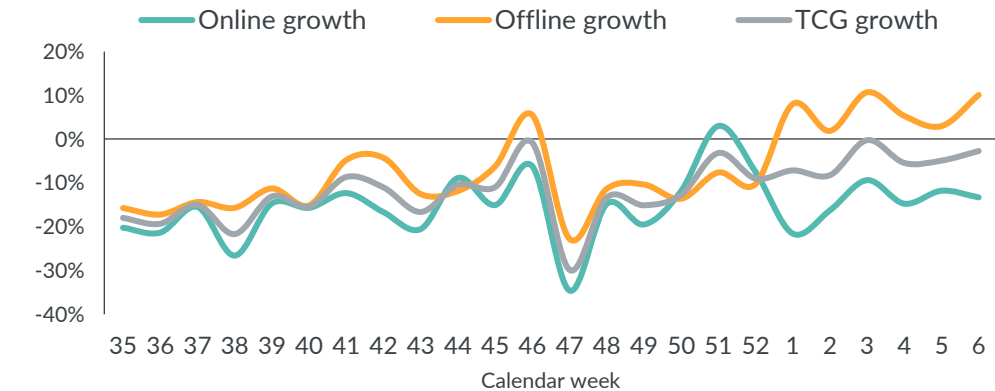
➤ Brazil

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 06 (Feb 06 – Feb 12)



- Traditional retail experienced a plus of 10% vs week 6 in 2022, but this failed to compensate for the losses of online sales (-13%), leaving total TCG at a minus of 3%.
- The rates for IT/Office products ranged from -14% for mobile computing to +37% for media tablets. Smartphones lagged at -7%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+20%) and vacuum cleaners (+17%). TV sales experienced an uplift of 6%. Audio home systems (-10%) posted a negative trend.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 06 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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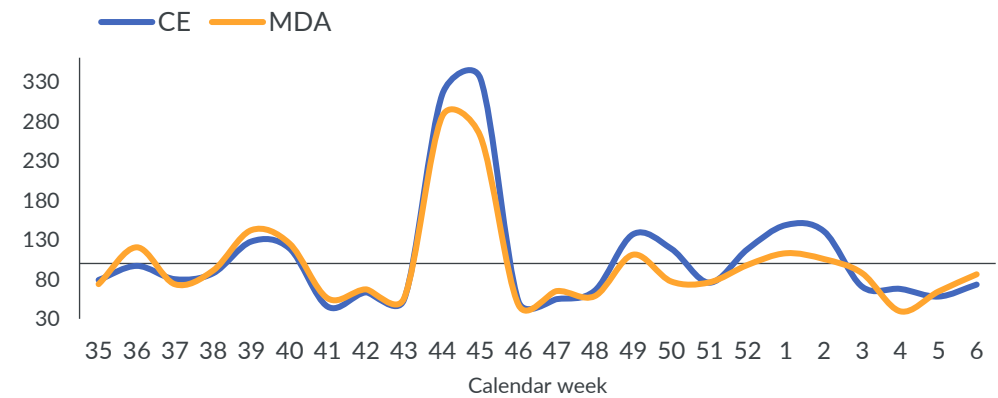
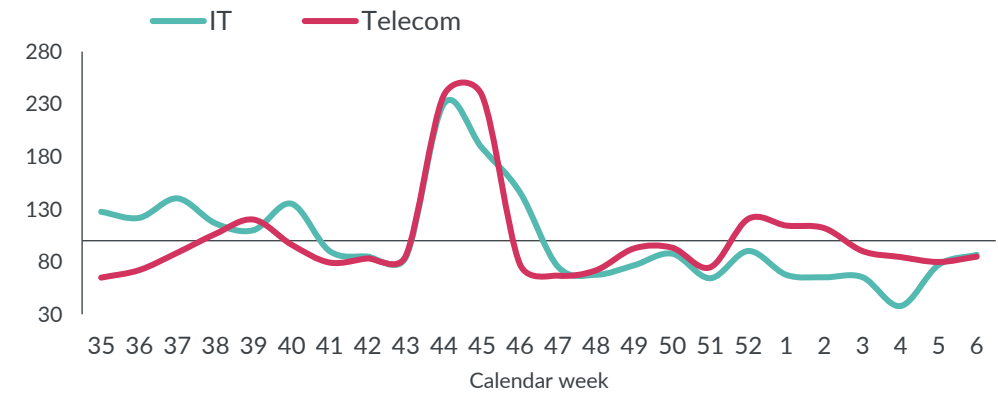
Japan

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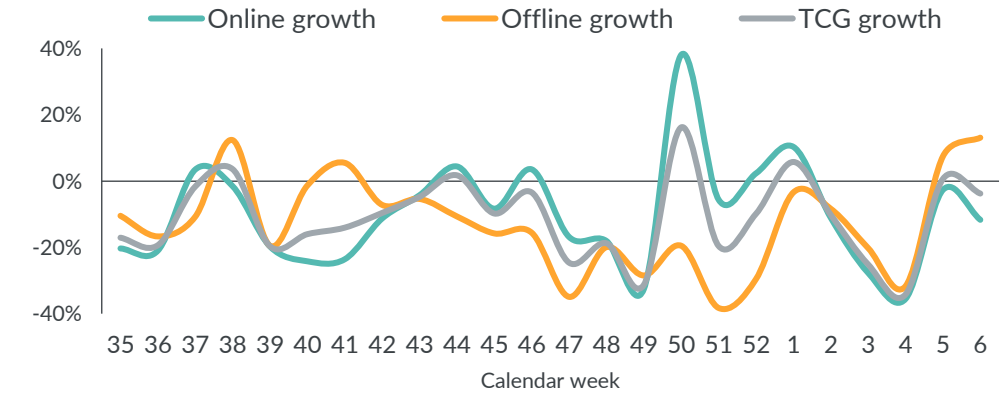


China

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 06 (Feb 06 - Feb 12)



- Traditional retail experienced a plus of 13% vs week 6 in 2021, but this failed to compensate for the losses of online sales (-12%) and left the total TCG at a minus of 4%.
- Mobile PCs accelerated at 35%. Smartphones delivered a minus of 15%.
- Week 6 in 2023 saw solid increases for TV sales (+13%), washing machines (+21%) and overall cooling at +38%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 06 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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