



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 145

cw09/2023

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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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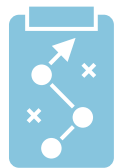
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Fact of the Week

Comparing the last financial crisis 2008/2009 with today

Newcomer/Asian brands (SDA) historically overcame crises faster, challenging established players



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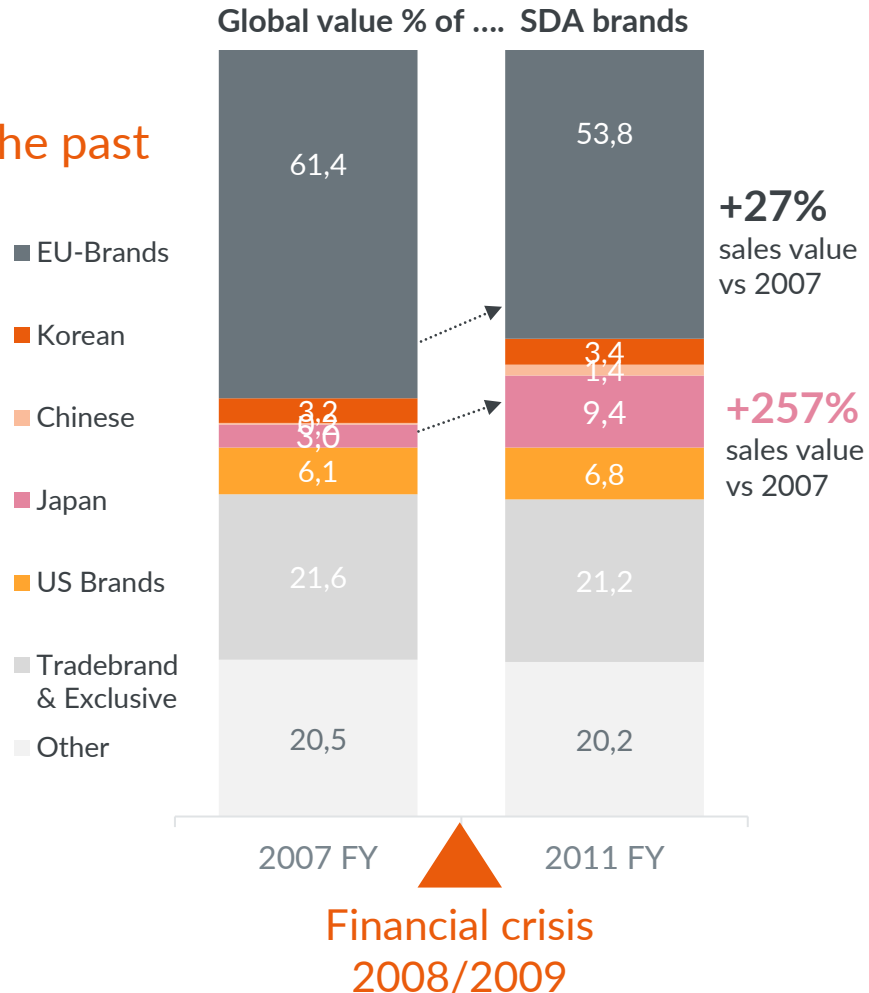
Russia

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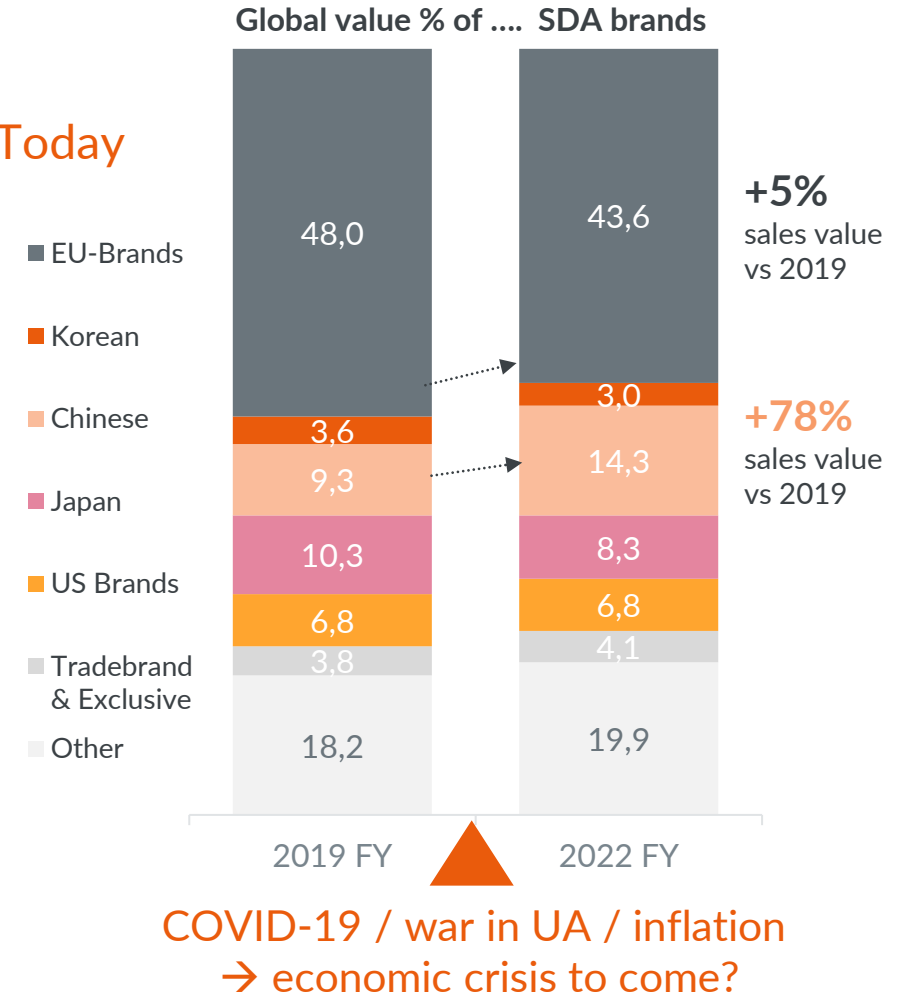
Brazil

China

The past



Today



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.

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Fact of the week

➤ Germany

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France

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Spain

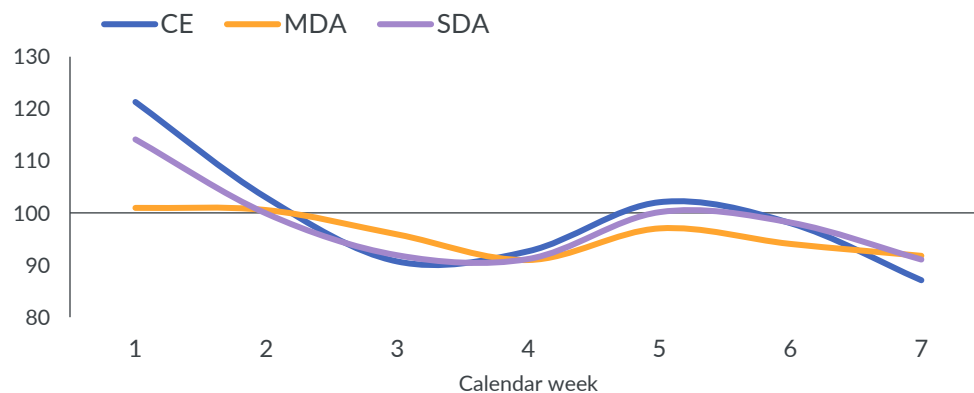
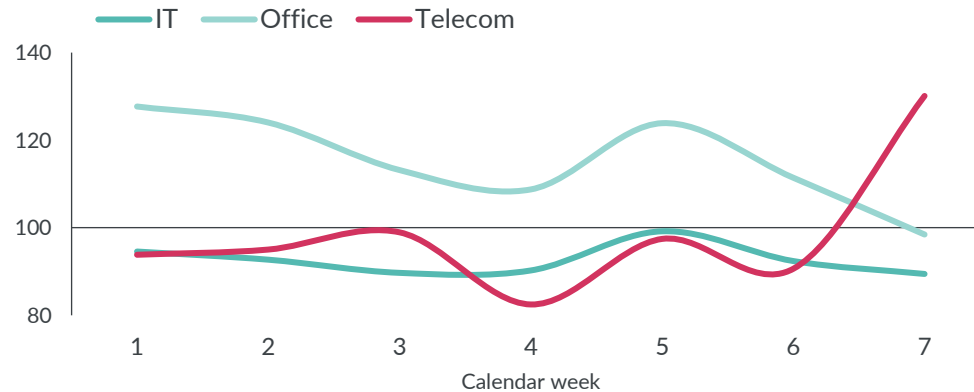
Russia

Japan

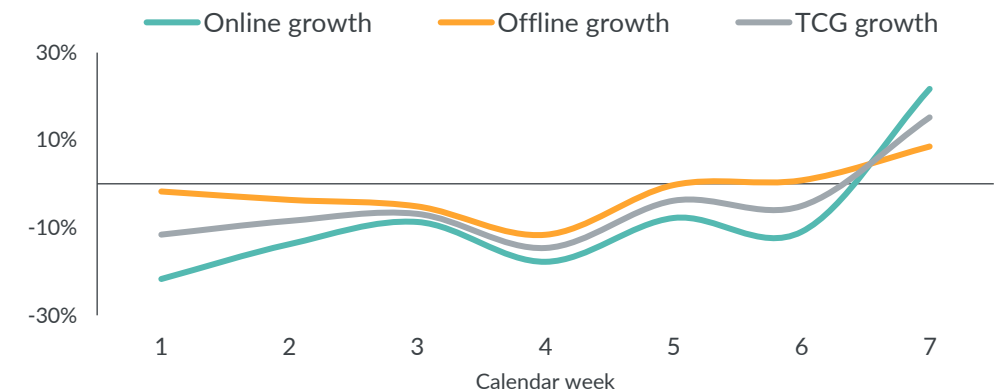
Brazil

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 07 (Feb 13 - Feb 19)



- The total TCG market (including air treatment) accelerated at 15%, driven by online sales at +22%. Traditional retail increased by 9%.
- The driver of this development was smartphones at +61% (Samsung launched the Galaxy S23 series). Except for laser printers which were flat, all IT/Office products fell in double digits, led by desk computing at -30%.
- CE products declined in double-digits, with TVs losing 19%. While cooling was flat, washing machines slightly increased by +2%. Dental care was the only positive product group among SDA products in week 7, at +7%. Air treatment posted the biggest decline at -40%.

Weekly retail insights from the Point of Sale

Spotlight on Great Britain



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Fact of the week

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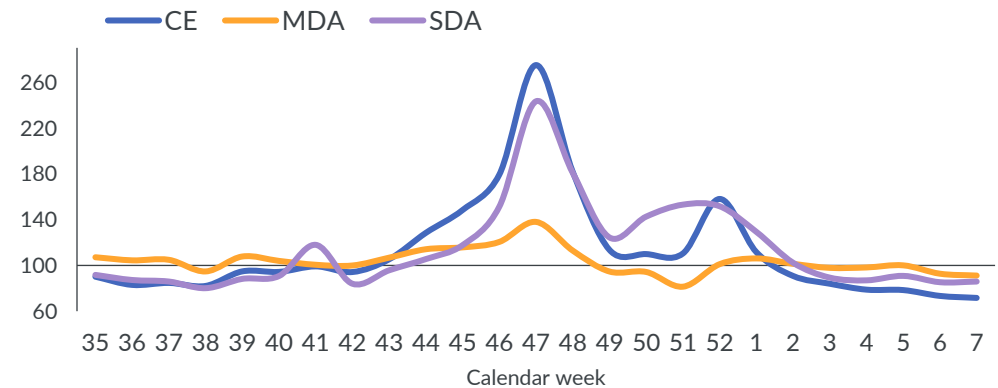
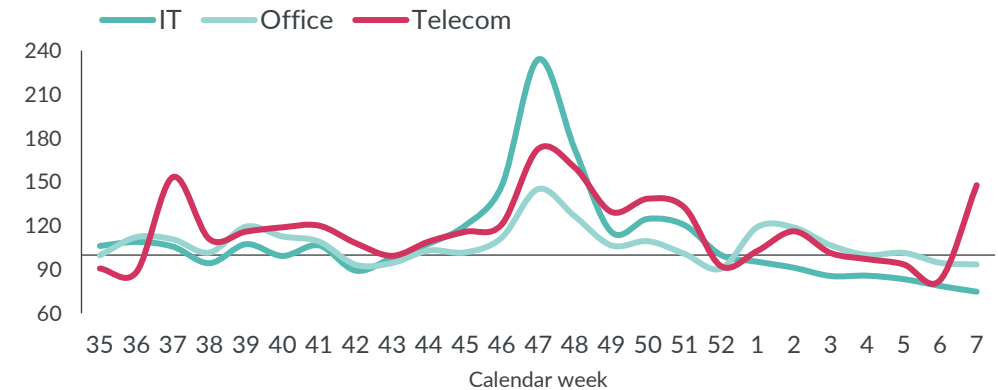
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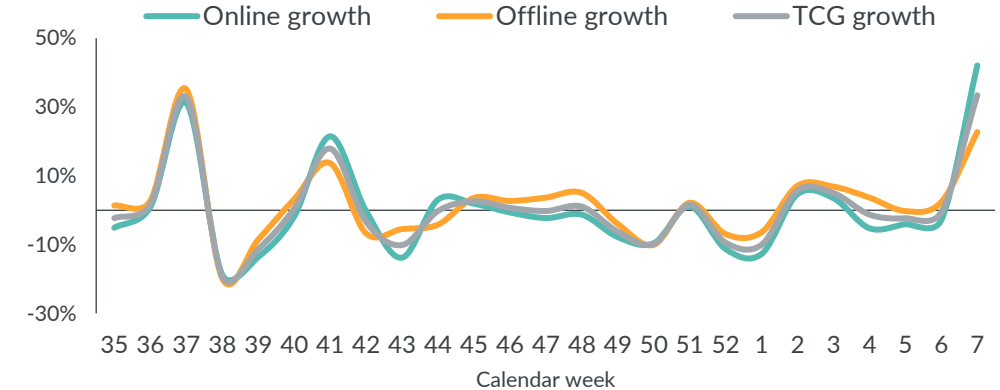
Brazil

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 07 (Feb 13 - Feb 19)



- A huge increase of online sales vs week 7 in 2022 (+42%) led to an acceleration of +33% for the total TCG market. Traditional retail added to it by growing 23%.
- Smartphones were the best-performing product group in week 7, at +101% (Samsung launched the Galaxy S23 series). Except for laser printers at +42%, all other IT/Office categories lost mainly in double-digits.
- CE products posted negative trends, with TV sales losing 22%. The mixed picture for MDA/SDA categories saw dental care in the lead (+11%) and food preparation bringing up the rear at -6%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 - 07 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



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Fact of the week

Germany

Great Britain

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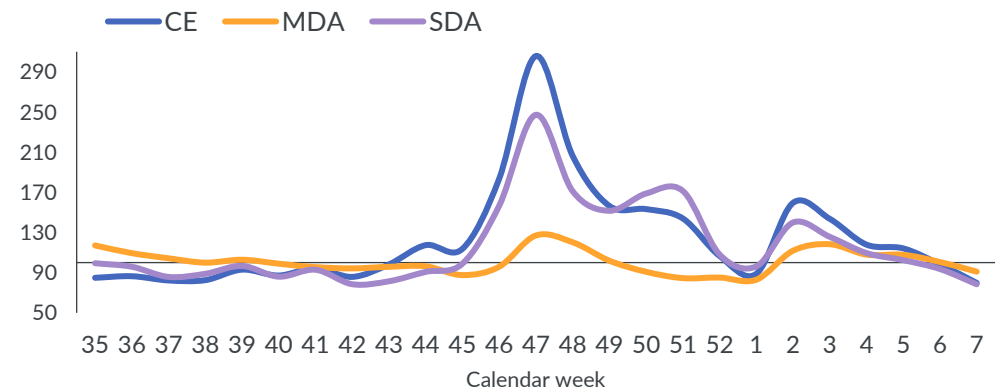
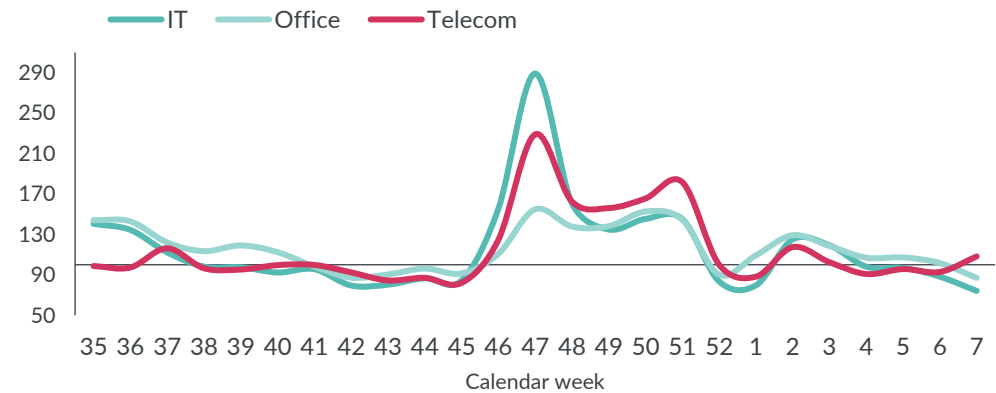
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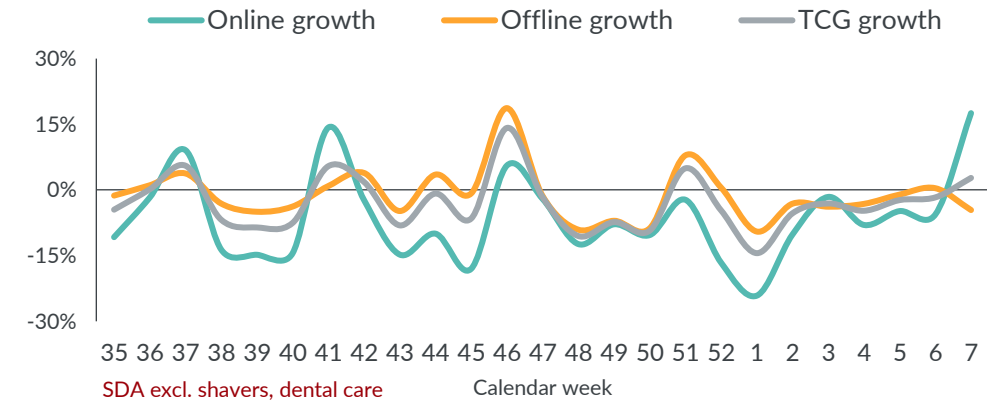
Brazil

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 07 (Feb 13 - Feb 19)



- The recovery of online sales (+18% vs -6% the previous week) brought growth for the total TCG market of +3%. Traditional retail at -5% (it was flat the previous week) failed to affect this result.
- IT/Office products posted negative trends, ranging from -5% for mice to -23% for desk computing. Smartphones at +37% were the best-performing product group in week 7.
- While CE categories were negative (TVs at -10%), the mixed picture for MDA/SDA products ranged from -21% for food preparation to +25% for air treatment.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 07 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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Fact of the week

Germany

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France



Italy

Spain

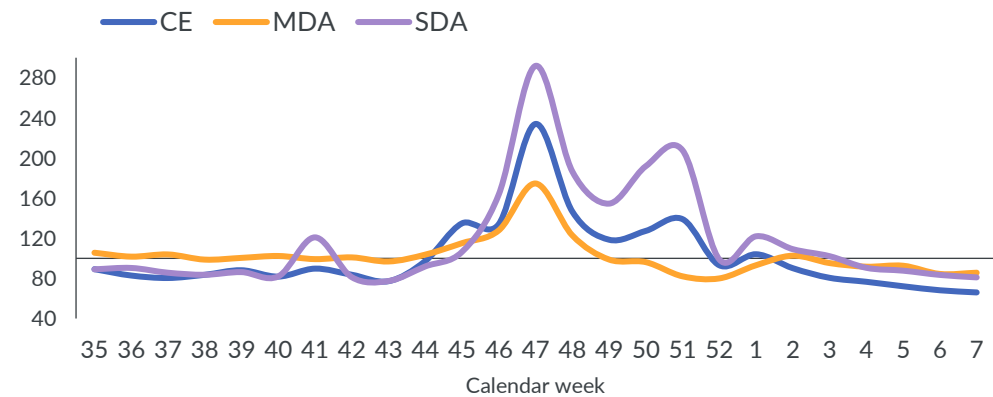
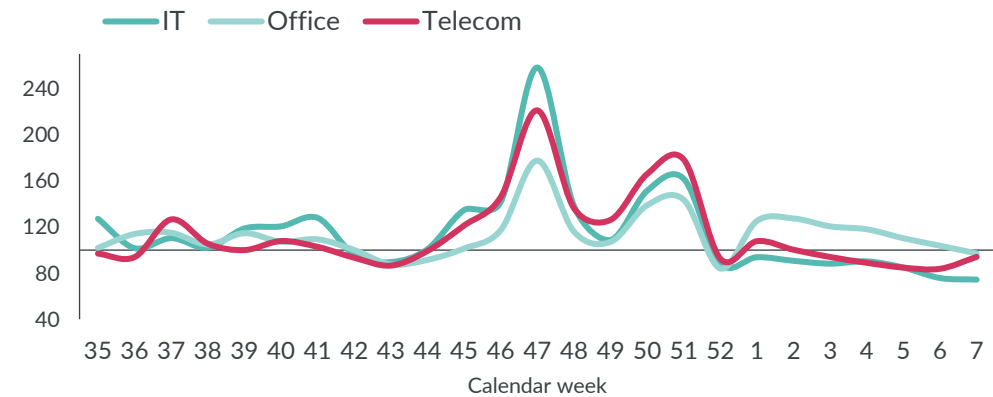
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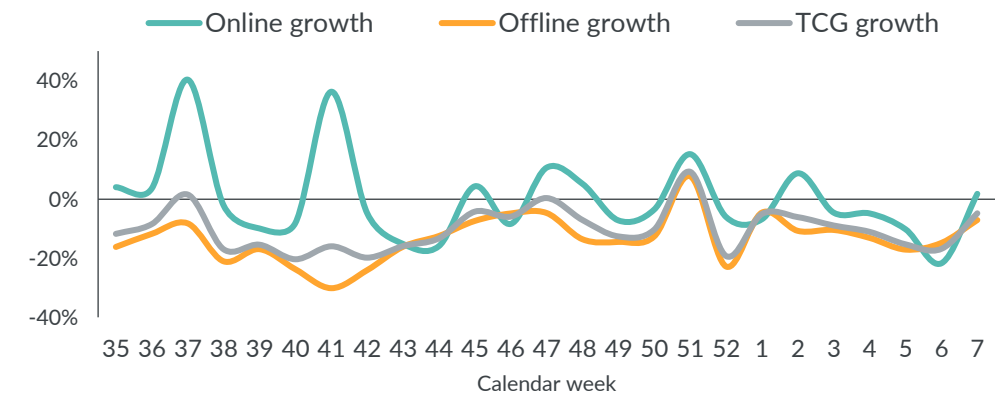
Brazil

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 07 (Feb 13 - Feb 19)



- The total TCG market fell by 5%, driven by traditional retail posting -7% in week 7 2023. Online sales were slightly up by 2%.
- With the exception of media tablets at -3%, all other IT/Office products decreased in double digits, led by laser printers at -25%. Smartphones experienced an upswing of 9%.
- While TV (-31%) and audio home systems (-26%) lost in solid double digits, air treatment delivered growth of 43%. MDAs gained 8% (cooling at +10%, washing machines at +6%). SDA categories delivered a mixed picture, ranging from +5% for shavers to -6% for dental care.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 07 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

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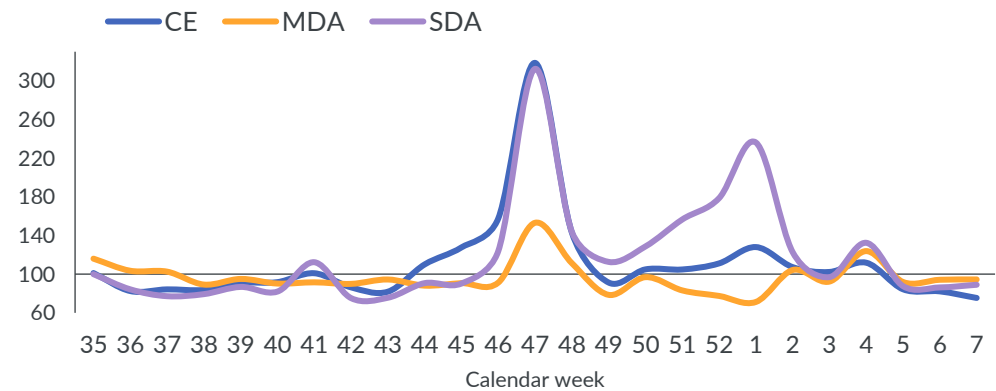
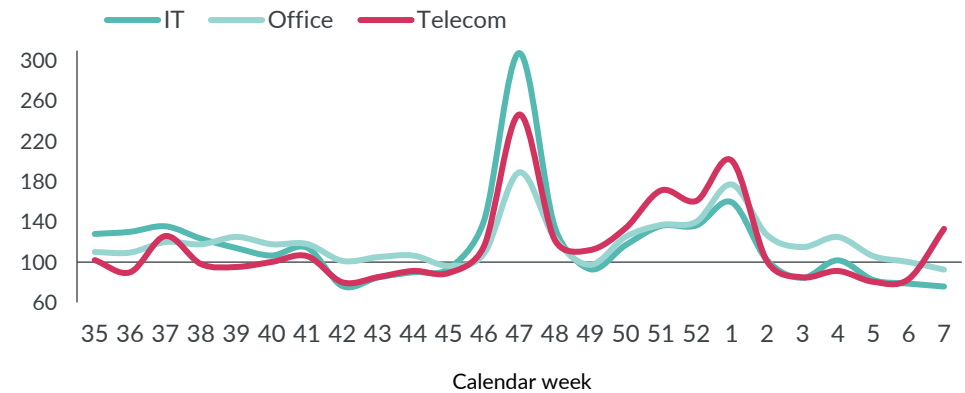
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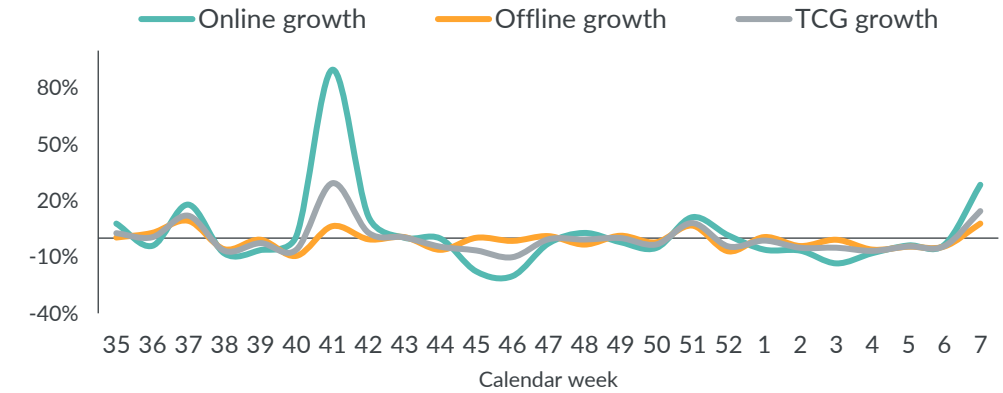
Brazil

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 07 (Feb 13 - Feb 19)



- A good recovery for both traditional retail at +8% and online sales at +28% (both up from -4% in week 6) delivered an upswing of +14% for the total TCG market.
- Desktop computing (-23%) was the worst-performing product group among IT/Office products. Mobile computing lagged at -18%. Laser printers were flat. Smartphones accelerated at +72% (Samsung launched the Galaxy S23 series).
- While MDA/SDA categories were positive, led by washing machines at +18%, CE products declined, with audio home systems in the lead at -25%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 07 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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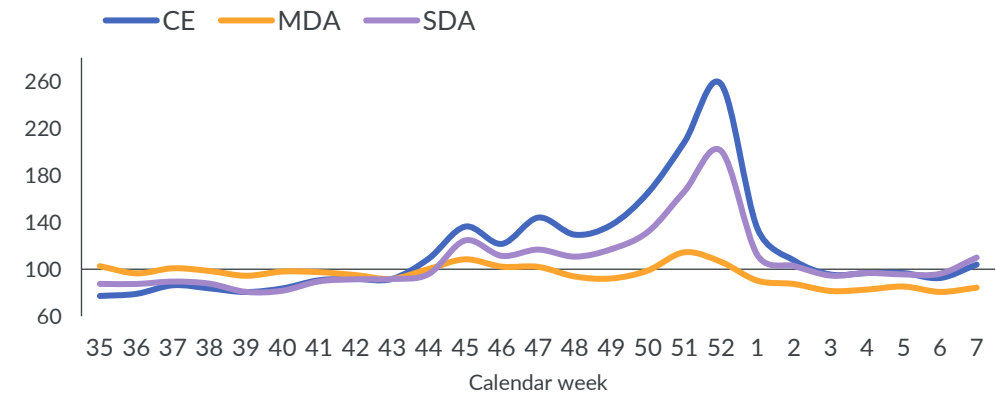
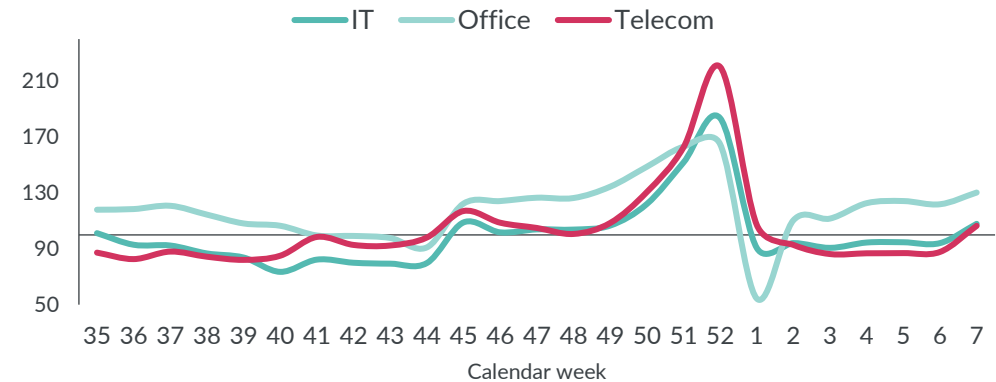
> **Russia**

Japan

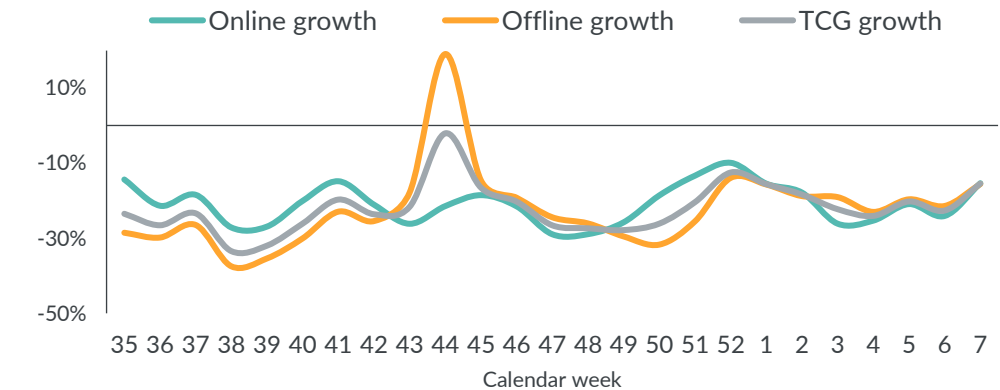
Brazil

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 07 (Feb 13 - Feb 19)



- Both distribution types dropped, online sales at -15% and traditional retail at -16%, causing a decline for the total TCG market of 15%.
- Monitors and laser printers posted growth of 14% and 7% respectively while media tablets, desk computing, and mobile computing lost in double digits. Inkjet printers and mice were flat. Smartphones slumped at -28%.
- The overall negative picture for SDA products was led by shavers at -40% and dental care posted -38%. Washing machines experienced an uptick of 11%. As in past periods, audio home systems stood out at +120%. TV sales recovered at +5%, up from -7% in week 6.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 07 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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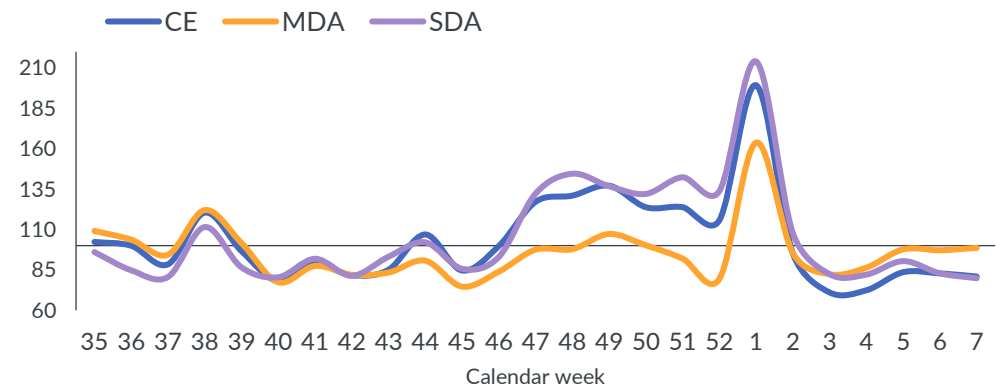
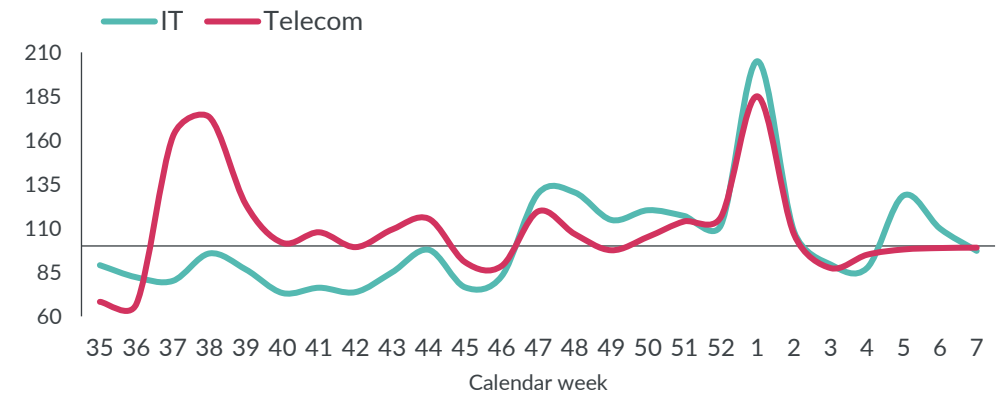
Russia

➤ Japan

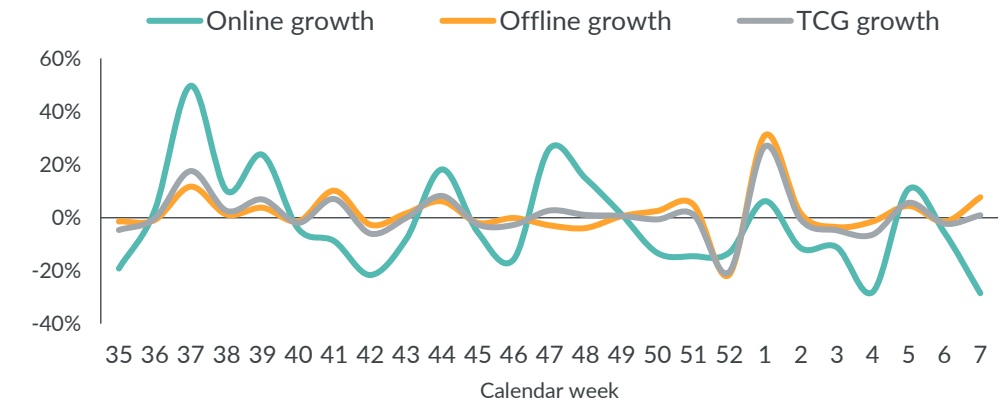
Brazil

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 07 (Feb 13 - Feb 19)



- Online sales dropped by -28% but traditional retail at +8% halted the fall of total TCG, enabling it to post a slight uptick of 1%.
- Smartphones delivered +17%. Media tablets decreased by 14%.
- While CE products witnessed negative trends with TVs posting -13%, MDAs were positive, cooling at +17% and washing machines at +4%. The mostly negative picture for SDA categories saw air treatment at -30% and vacuum cleaners at -11%. Hot beverage makers reached +17%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 07 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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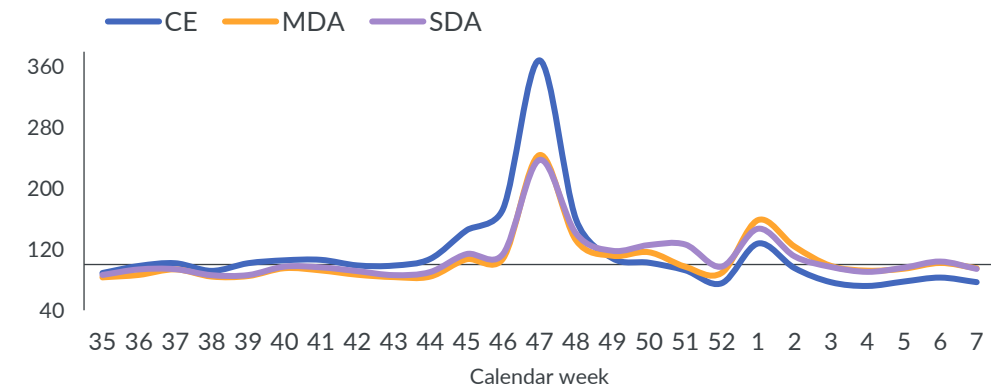
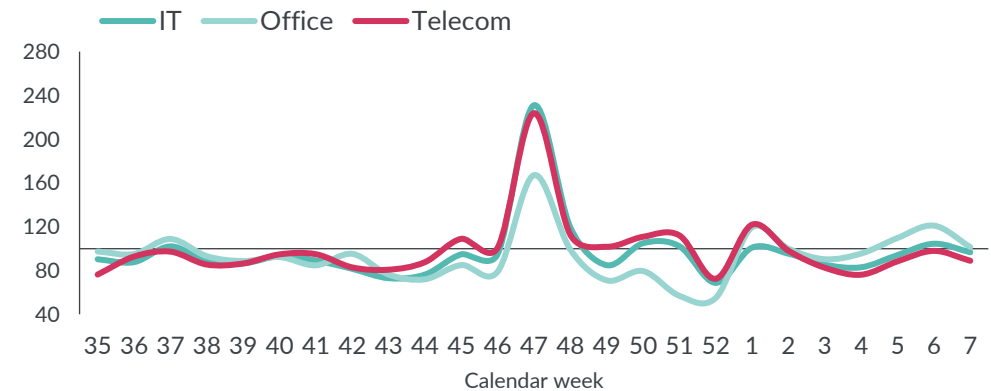
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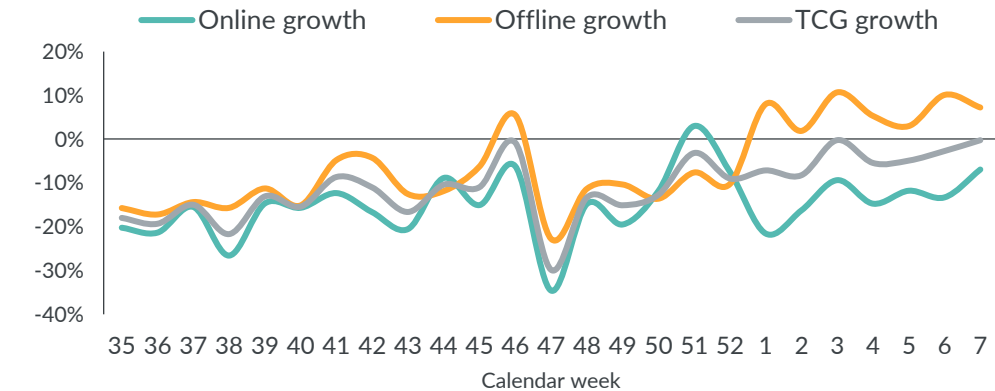
➤ Brazil

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 07 (Feb 13 - Feb 19)



- A flat total TCG market was the result of opposite development of online sales at -7% and traditional retail +7%.
- Media tablets at +47% were the ray of light among otherwise double-digit negative IT/Office products. Smartphones were stable at +0.4%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+13%) and vacuum cleaners (+17%). TV sales experienced an uplift of 3%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 - 07 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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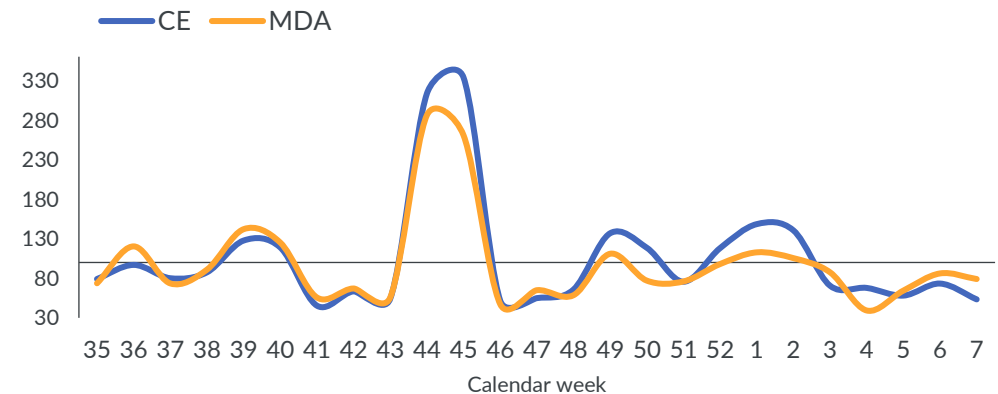
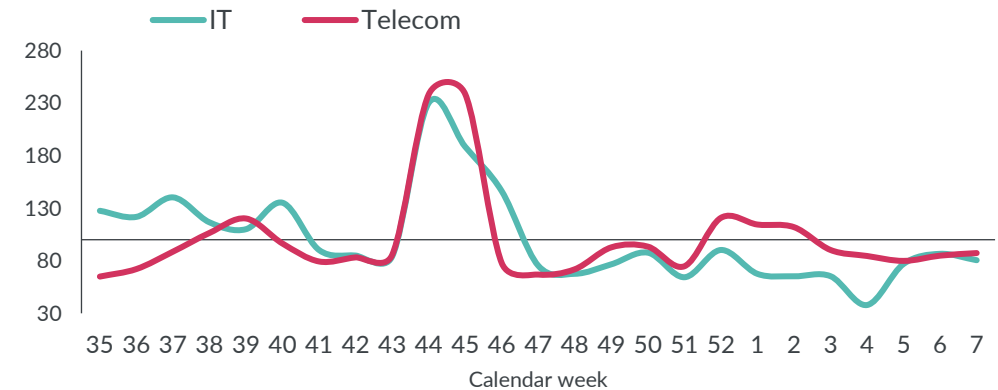
Japan

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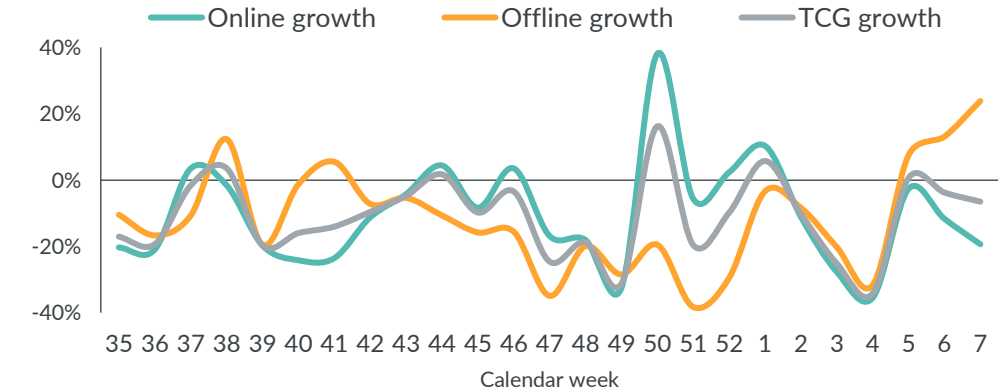


China

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 07 (Feb 13 - Feb 19)



- Traditional retail experienced a plus of 24% vs week 7 in 2022, but this failed to compensate for the losses of online sales (-19%) and left the total TCG at a minus of 7%.
- Mobile PCs decelerated at -7%. Smartphones delivered a minus of 10%.
- Week 7 in 2023 saw solid increases for washing machines (+11%) and cooling at +37%. TV sales declined by 21%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 07 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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