



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 146

cw08/2023

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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 run into 2023. 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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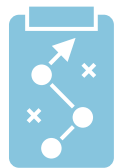
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Fact of the Week

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



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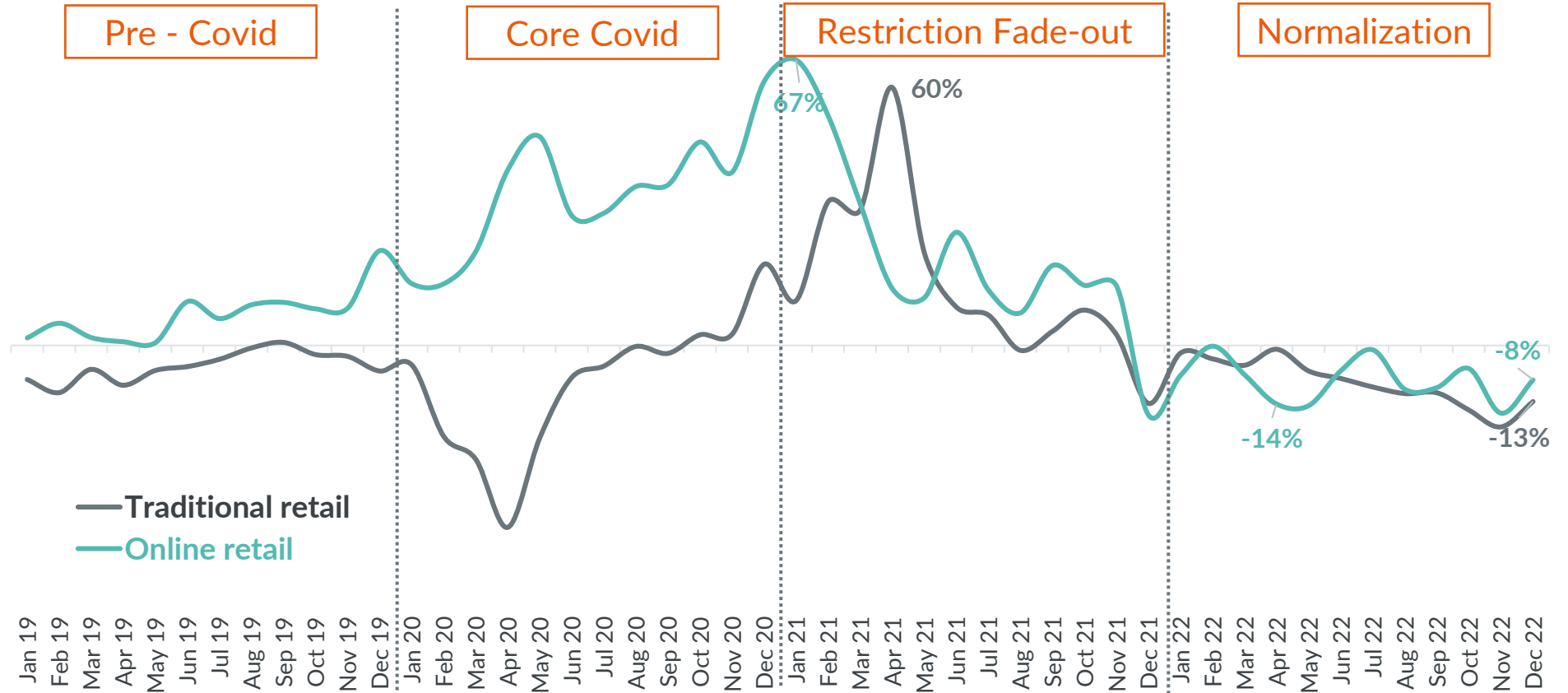
Russia

Japan

Brazil

China

Global | TCG | Sales USD Growth rate +/-%



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.

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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

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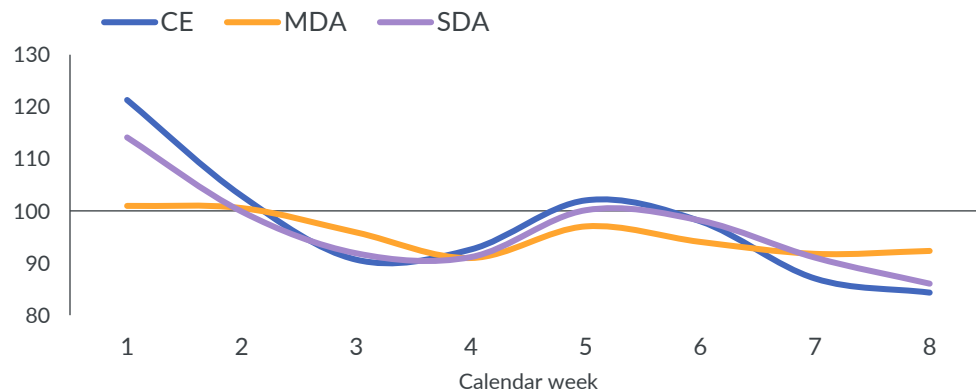
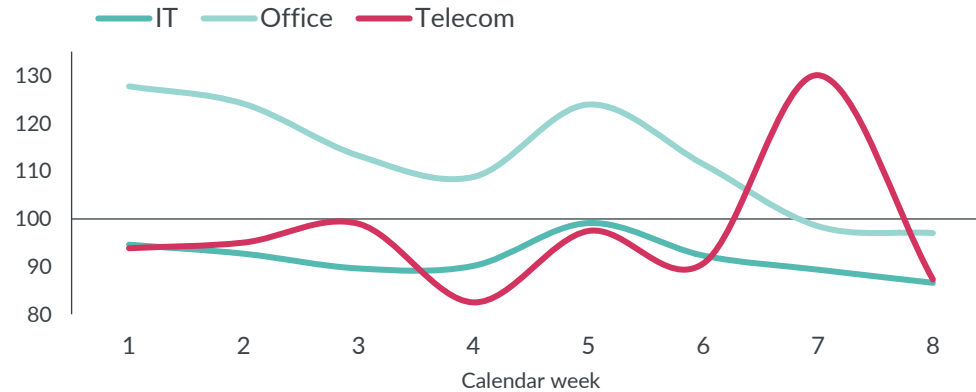
Russia

Japan

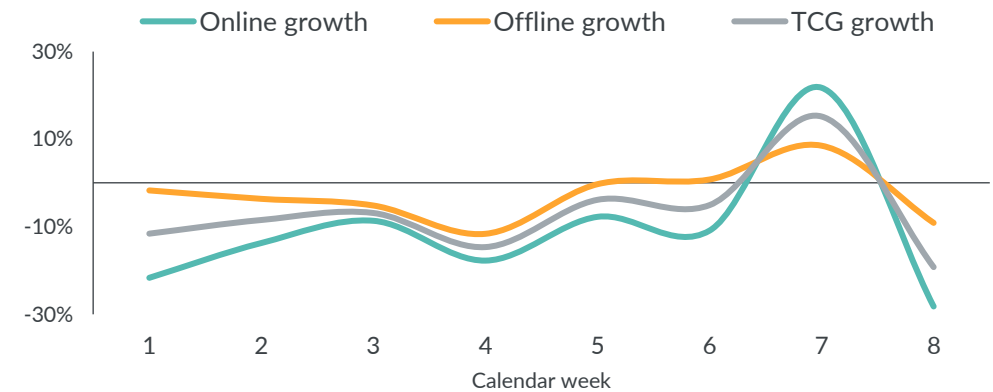
Brazil

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 08 (Feb 20 – Feb 26)



- The total TCG market (including air treatment) dropped by -19%, driven by online sales at -28%. Traditional retail fell by -9%.
- Except for mobile computing falling at -9%, IT products were down in double digits, led by media tablets at -25%. Laser printers were stable, but inkjet printers dropped by -19%. Smartphones reduced by -26%.
- While soundbars and audio home systems again fell in double-digits, TV sales decreased further by 22%. Dental Care and Vacuum Cleaners were positive product groups. Air treatment posted the biggest decline at -35%. Cooling was down. Washing Machines grew at a marginal rate of 1%.

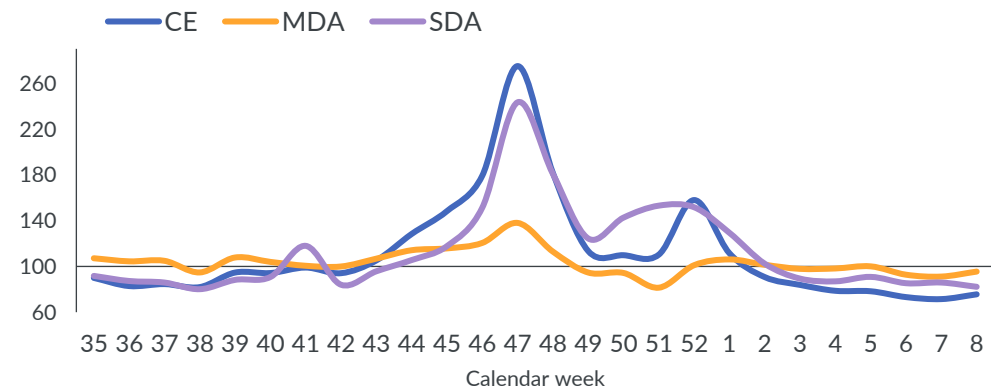
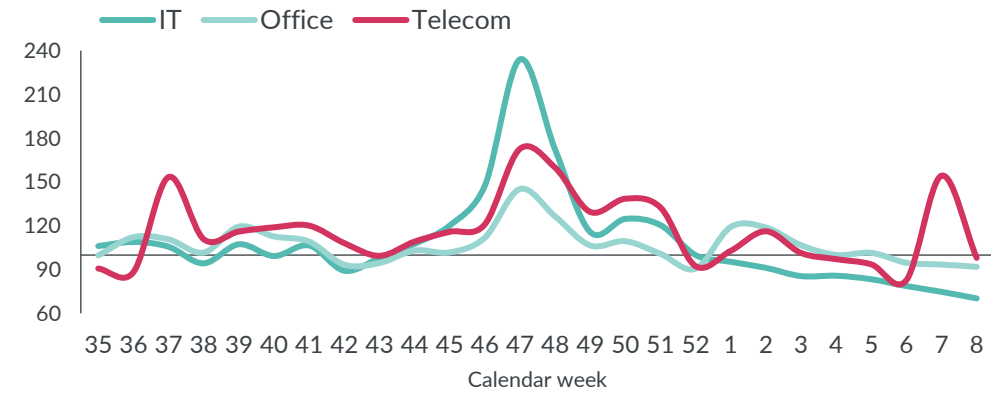
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

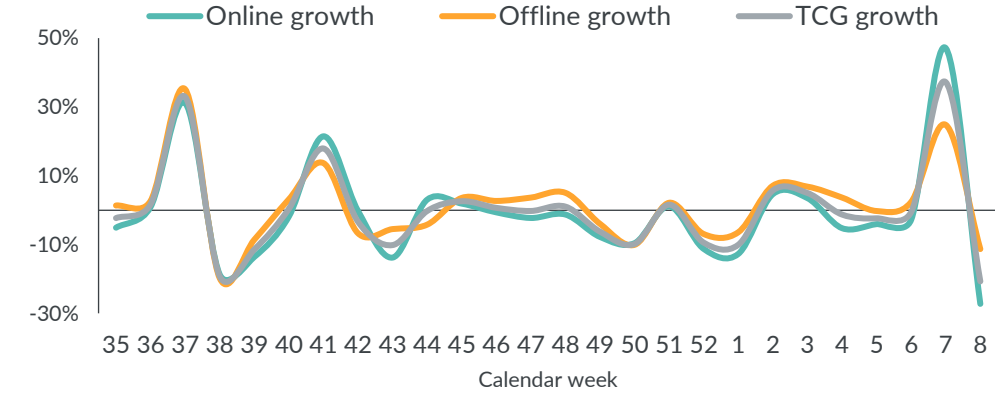


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 08 (Feb 20 - Feb 26)



- Deceleration of online sales (-27%) dragged the total TCG market down by 21%. Traditional retail declined by double digits.
- Laser printers were the best-performing product group in week 8 at +16%. All IT/Office categories lost in double-digits. Smartphones declined by -26%.
- CE products dropped in double-digits, with TV sales losing 19%. Soundbars was the only category registering growth of 8%. The mixed picture for MDA/SDA categories saw washing machines in the lead (+9%), cooling up (+3%) and dental care growing by (+8%) respectively.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 08 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

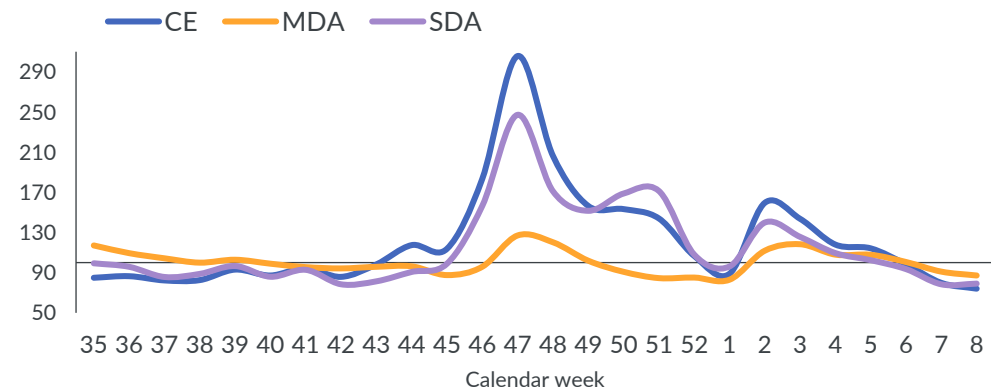
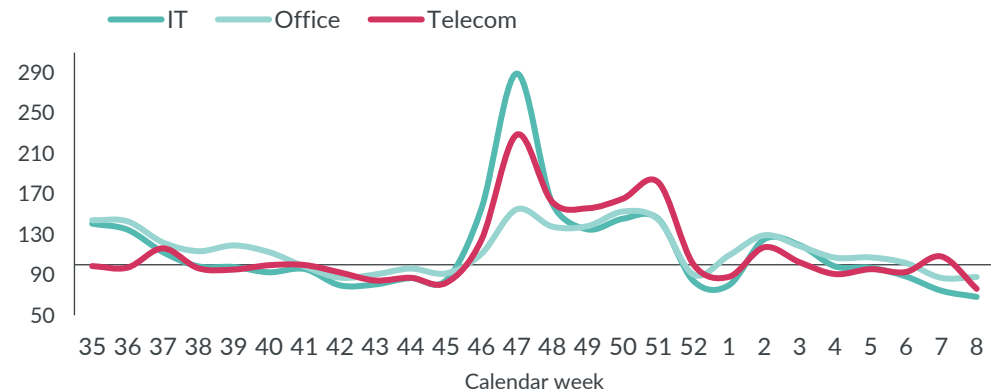
Weekly retail insights from the Point of Sale

Spotlight on France

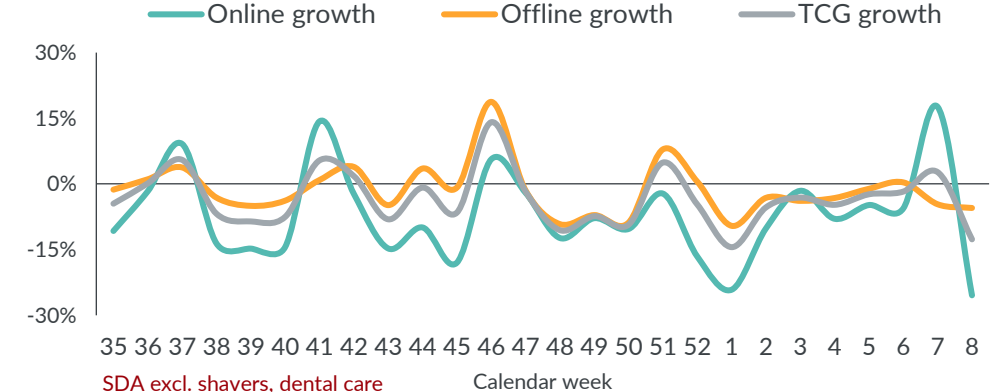


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 08 (Feb 20 - Feb 26)



- Online sales delivered -25% (18% the previous week) and traditional retail was down -5%, resulting in a downswing for the total TCG market of -13%.
- IT/Office products posted negative trends, ranging from -5% for monitors to -31% for desk computing and -14% for mobile computing. Inkjet printers & Laser printers declined. While smartphones lagged at -31%, headsets were up 13%.
- The mixed picture for MDA/SDA/CE products ranged from -12% for food preparation to +12% for air treatment. Washing machines grew by +2% while TV sales lagged at -9%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 08 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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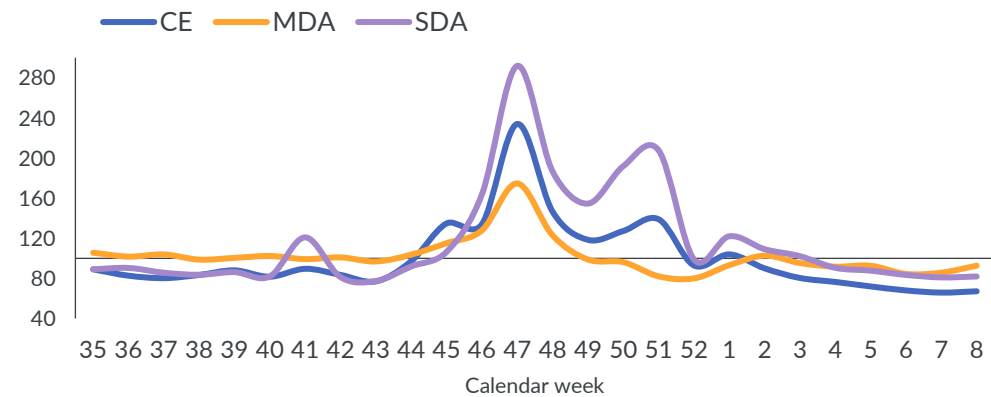
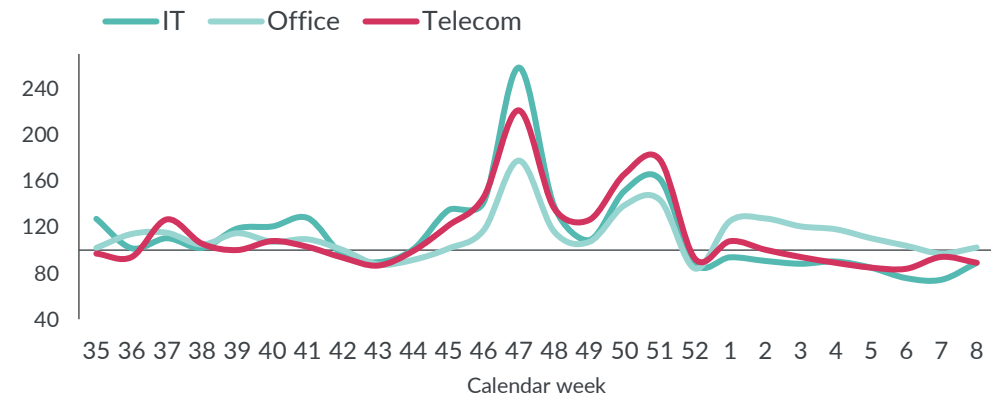
Russia

Japan

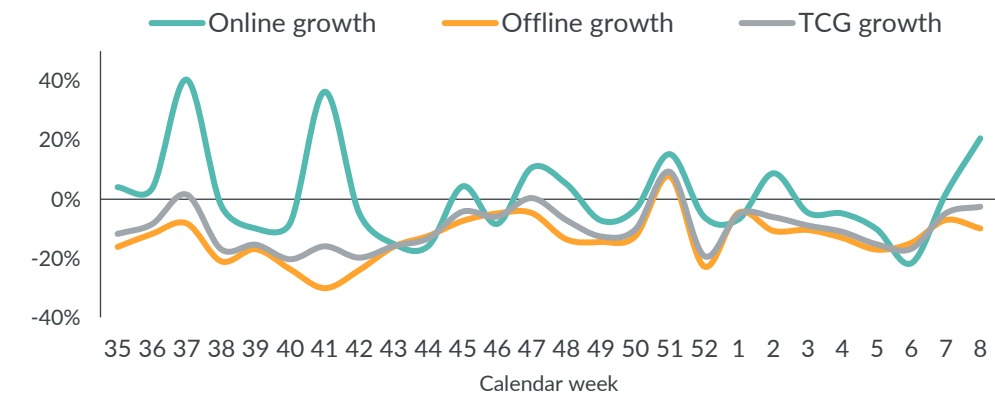
Brazil

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 08 (Feb 20 - Feb 26)



- The total TCG market fell by 3%, driven by traditional retail posting -10% in week 8 2023. Online sales were up by 21%.
- Media tablets grew at 6% and mobile computing increased by 1%, but all other IT/Office products decreased. Smartphones grew at 12%.
- While CE products lost in solid double digits (TVs posting -39%), air treatment delivered growth of 61%. MDAs gained 11% (cooling at +11%, washing machines at +10%). SDA categories delivered a positive picture, ranging from +21% for vacuum cleaners to +9% for hot beverage machines.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 08 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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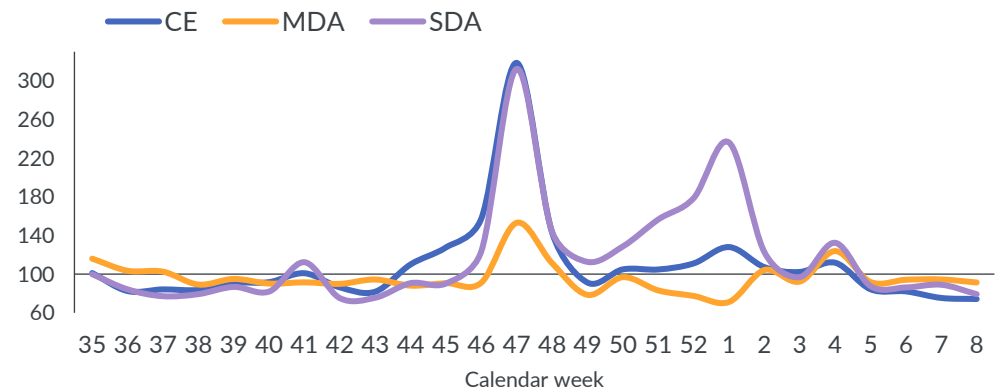
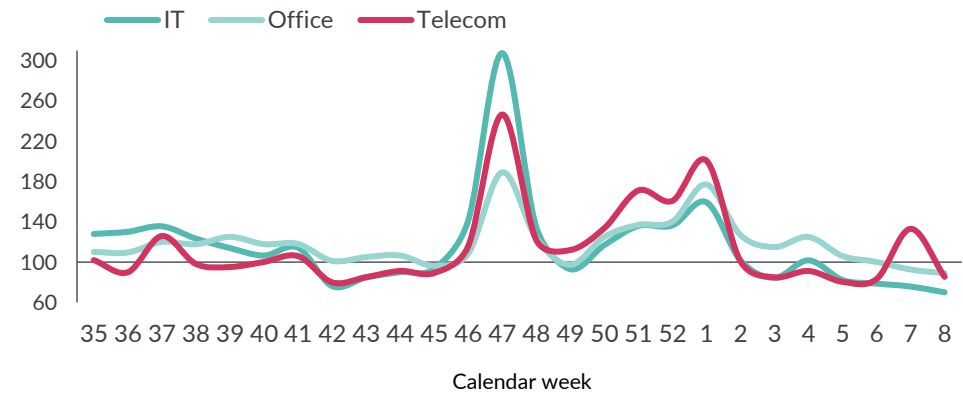
Russia

Japan

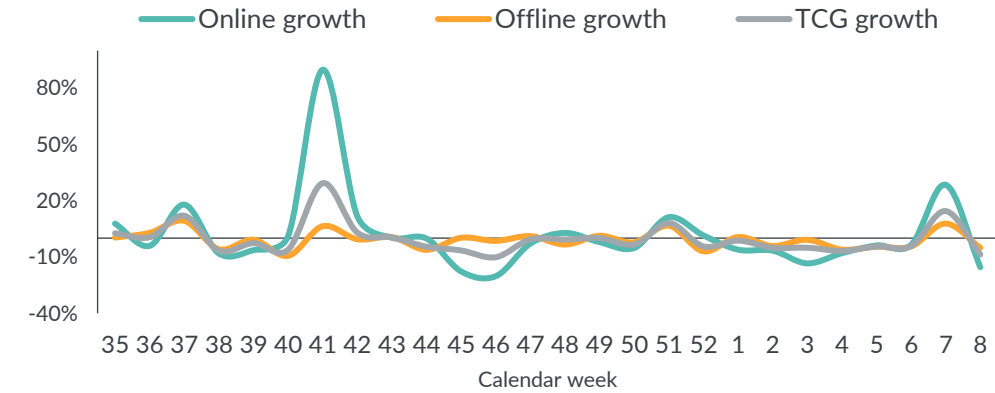
Brazil

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 08 (Feb 20 - Feb 26)



- Traditional retail experienced a minus of 5% versus week 8 in 2023 and online sales were down by -16%, resulting in a downswing of the total TCG market of 9%.
- Desktop computing (-35%) was the worst-performing product group among IT/Office products. Inkjet printers and laser printers lagged at -5% and -4% respectively. Smartphones were down -14%.
- MDA/SDA/CE products posted a mixed picture with washing machines in the lead at +7%. Vacuum cleaners returned to growth and grew by +6%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 08 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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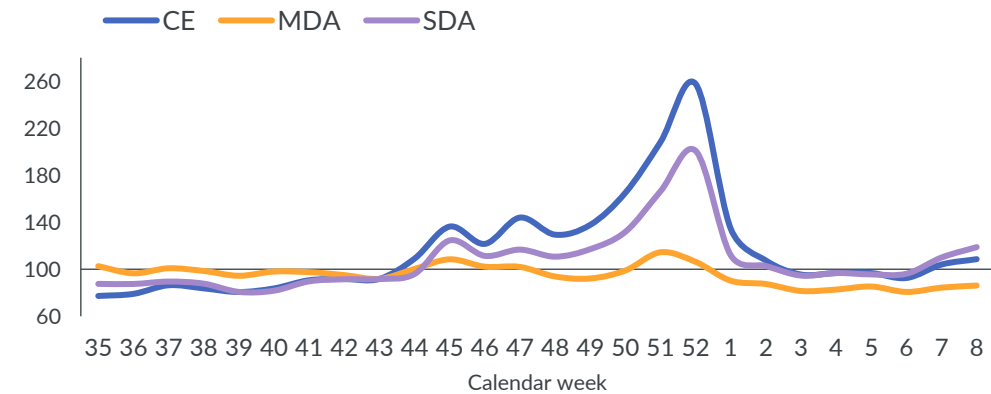
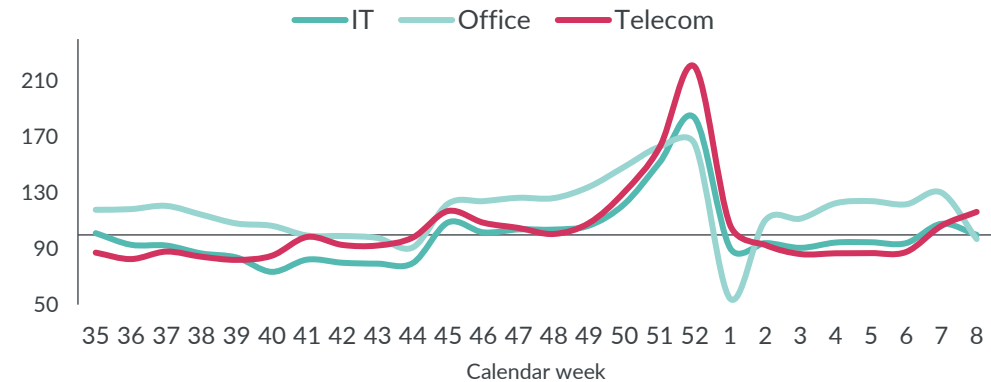
> Russia

Japan

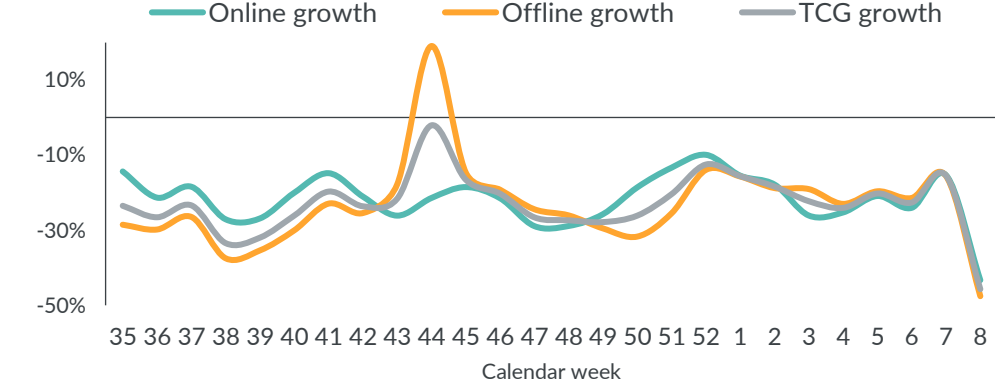
Brazil

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 08 (Feb 20 - Feb 26)



- Both distribution types dropped, online sales at -43% and traditional retail at -48%, leading to a decline for the total TCG market of -46%.
- Most IT/Office products lost in double digits, led by media tablets at -49% and mobile computing at -60%. Smartphones slumped at -46%.
- The overall negative picture for MDA/SDA/CE products was led by soundbars at -67% and TV at -50%. Cooling posted -56% and Washing machines experienced a decline of -49%. As in past periods, audio home systems stood out at +80%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 08 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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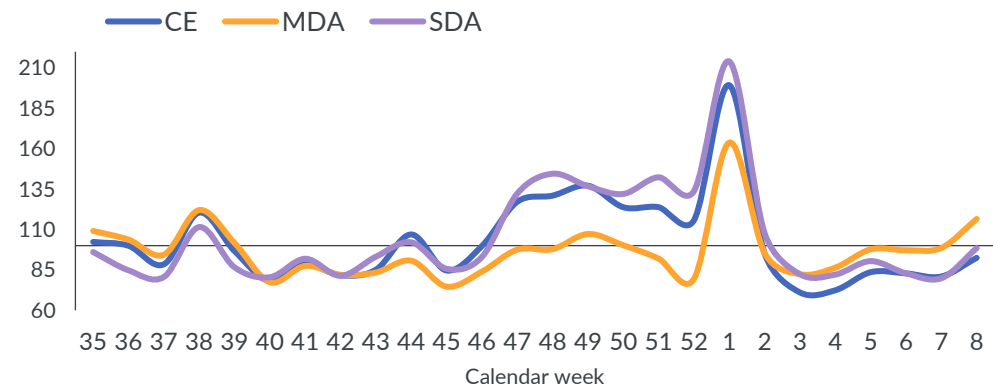
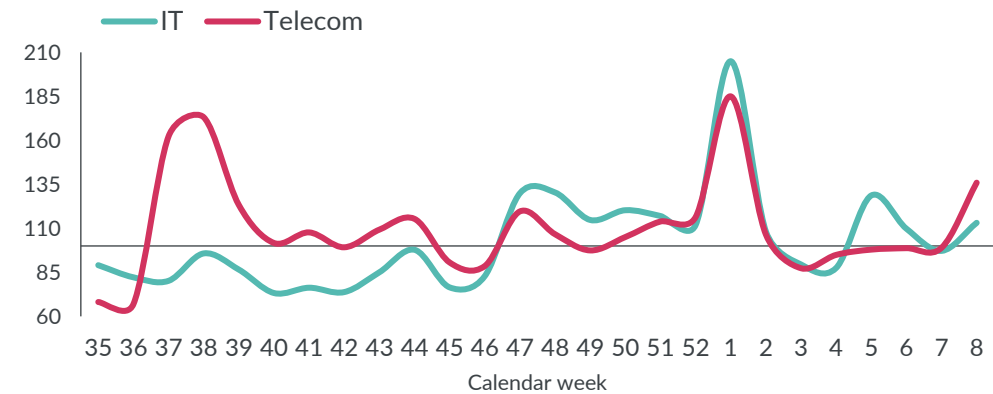
Russia

➤ Japan

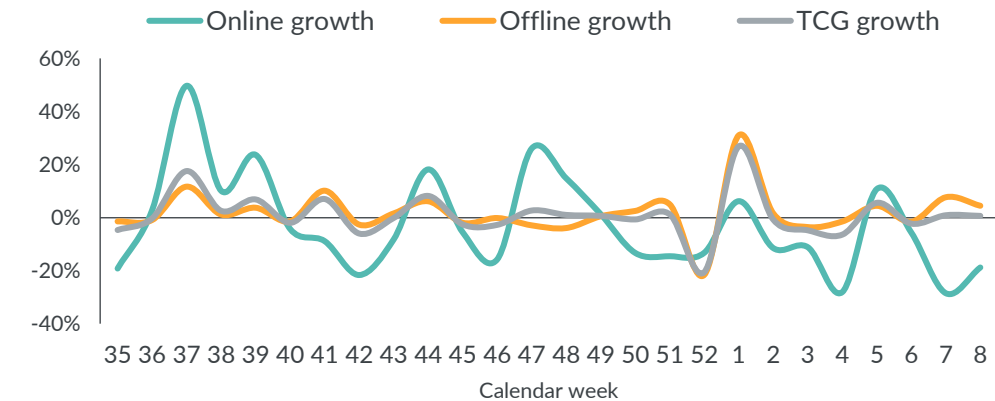
Brazil

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 08 (Feb 20 - Feb 26)



- Online sales continued to decline at -19% in week 8 vs -28 in week 7. Traditional retail recovered at +4%, which enabled it to compensate for losses, so the total TCG market grew by 1%.
- Mobile computing posted +2% growth while media tablets declined by -24%. Telecom sales revived with smartphones growing by +3%.
- While CE products witnessed negative trends with TVs posting -13%, MDA categories were positive at +10%. The mixed picture for SDA categories was led by Hot Beverage Machines at +34%. Air Treatment took last place at -21%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 08 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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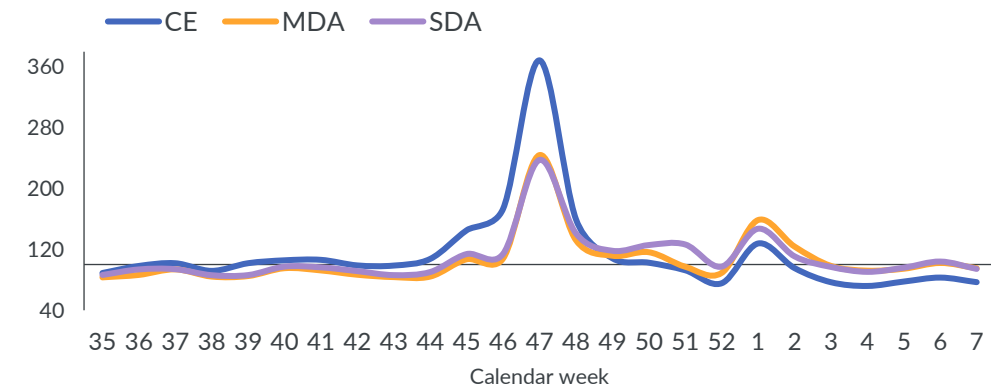
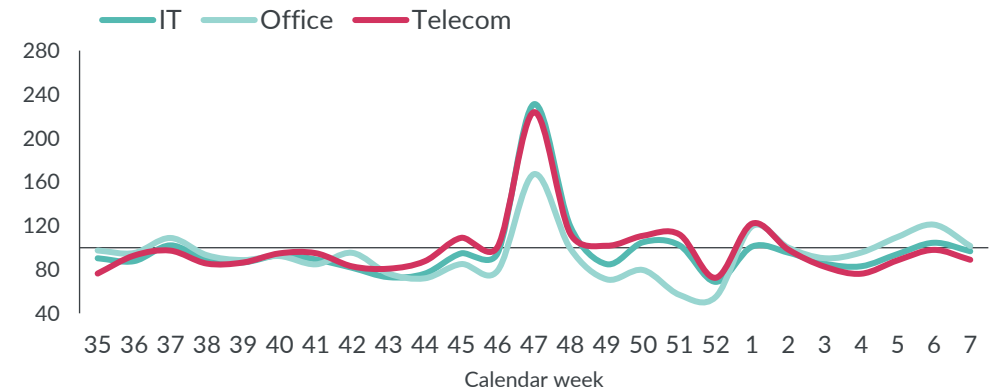
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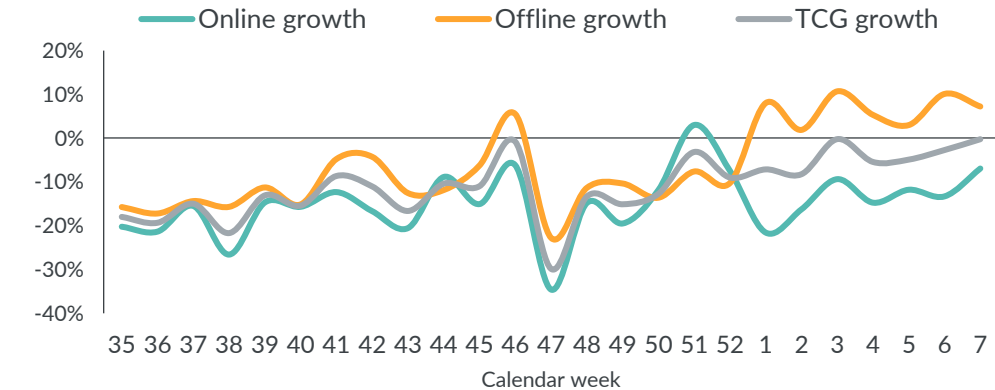
➤ Brazil

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 08 (Feb 20 - Feb 26)



- Traditional retail experienced a decline of -7% versus +7% last week. Similarly, online sales declined (-1%) leaving total TCG at a minus of 4%.
- The rates for IT/Office products ranged from -15% for mobile computing to +26% for media tablets. Smartphones lagged at -4%.
- The picture was mixed with negative for MDA/CE and positive for SDA product groups. Categories such as vacuum cleaners (+33%) and hot beverage makers (+18%) grew, while cooling declined by -10%. TV sales declined by 2% and Audio home systems by 16%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 08 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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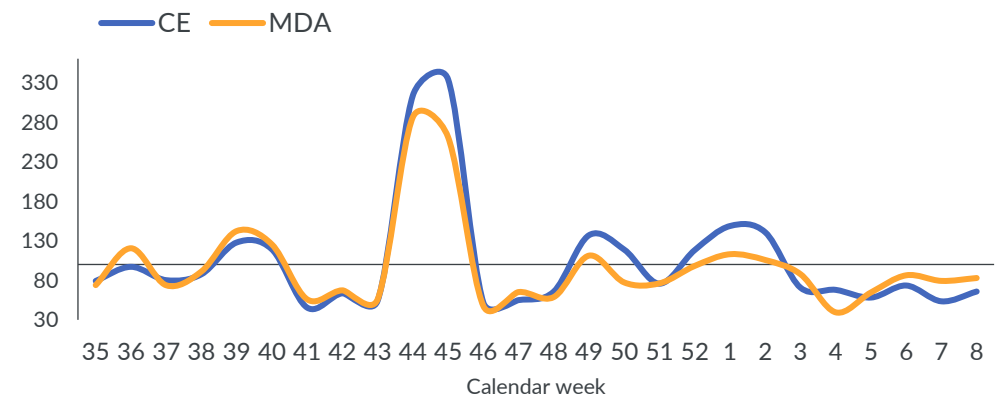
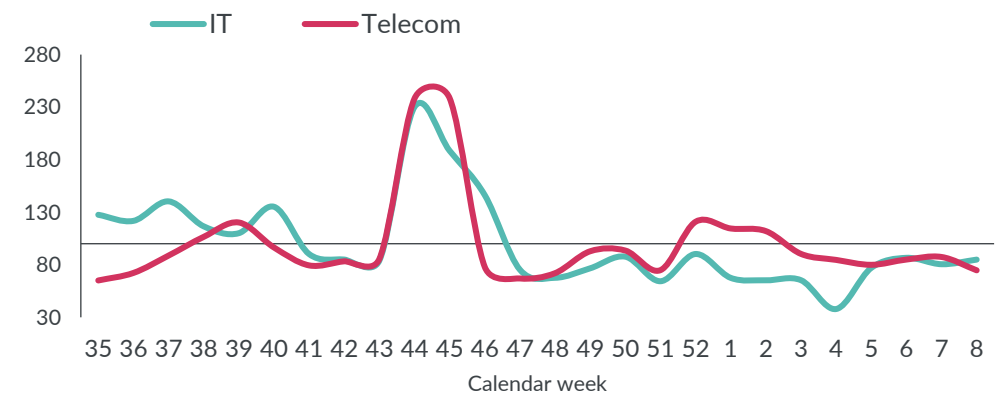
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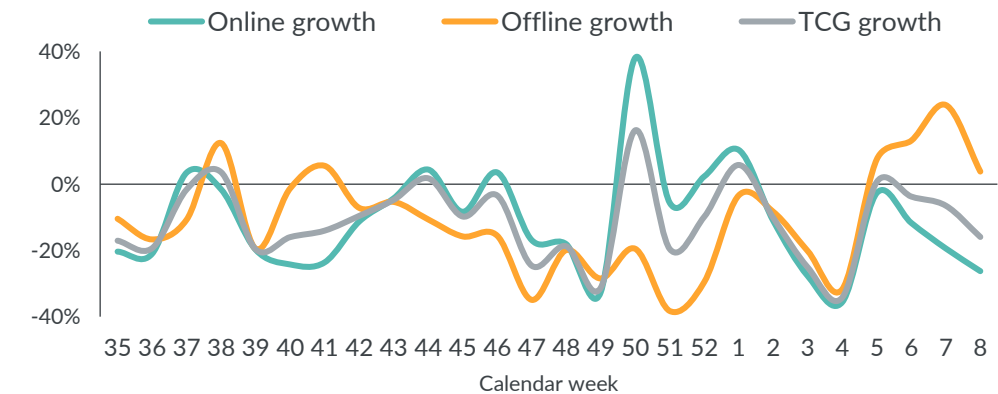


China

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 08 (Feb 20 - Feb 26)



- The recovery continued for traditional retail at +4% (up from -32% in week 4). However total TCG declined by 16% as online sales posted -26%. Movement of lunar new year and spring promotion to February from March in the previous year resulted in change in dynamics primarily for offline sales.
- Mobile PCs declined at 26%. Smartphones delivered a minus of 15%.
- Week 8 in 2023 saw solid decrease for TV sales (-12%), washing machines (-20%) and overall cooling which declined at -3%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 08 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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