



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 148

cw10/2023

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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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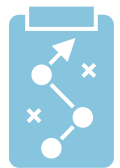
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Fact of the Week

MDA: History repeating itself - newcomer/Asian brands seize opportunities during times of crises



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Key Technical Consumer Goods product groups

> Fact of the week

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France

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Spain

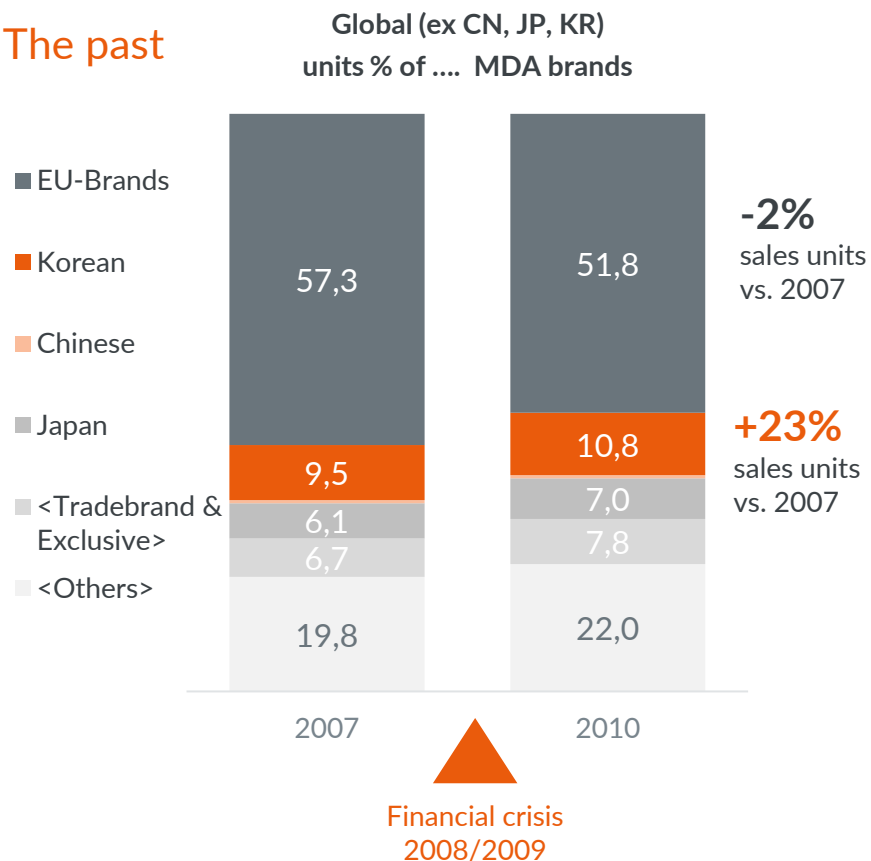
Russia

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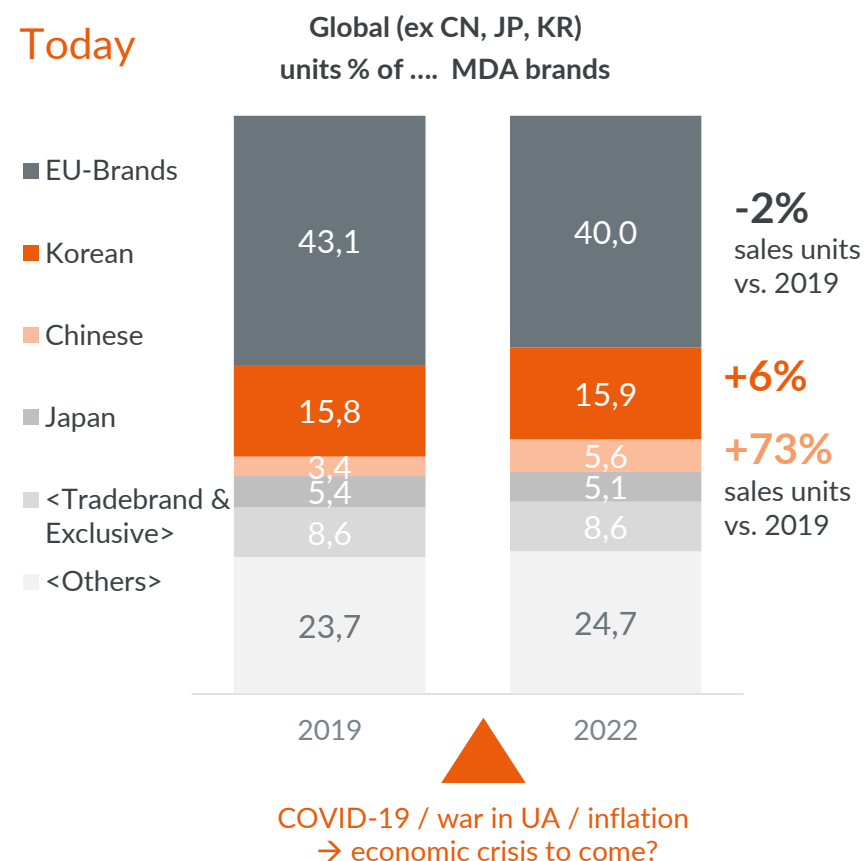
Brazil

China

The past



Today



Weekly retail insights from the Point of Sale

Spotlight on Germany



About **gfknewron**

Fact of the week

➤ Germany

Great Britain

France

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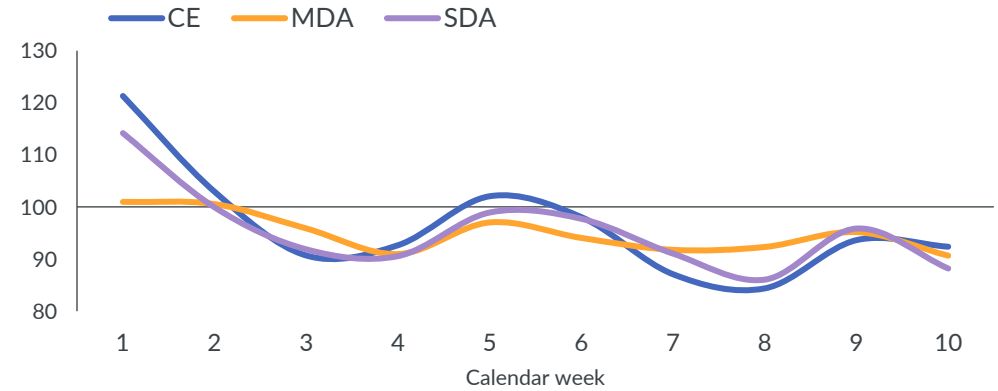
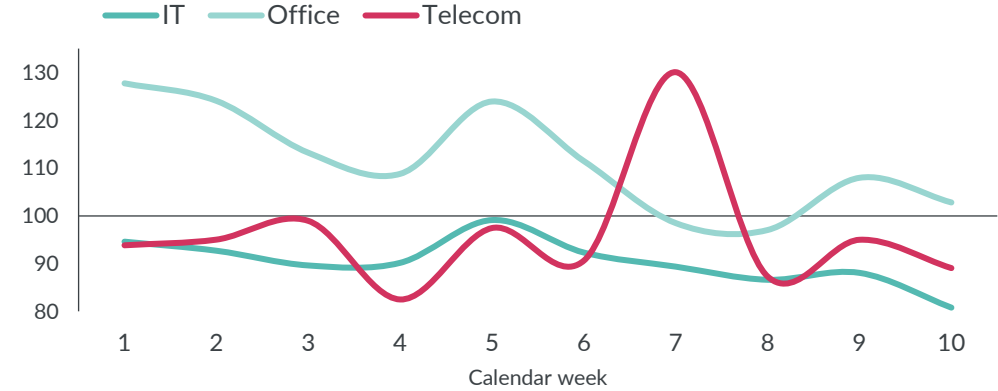
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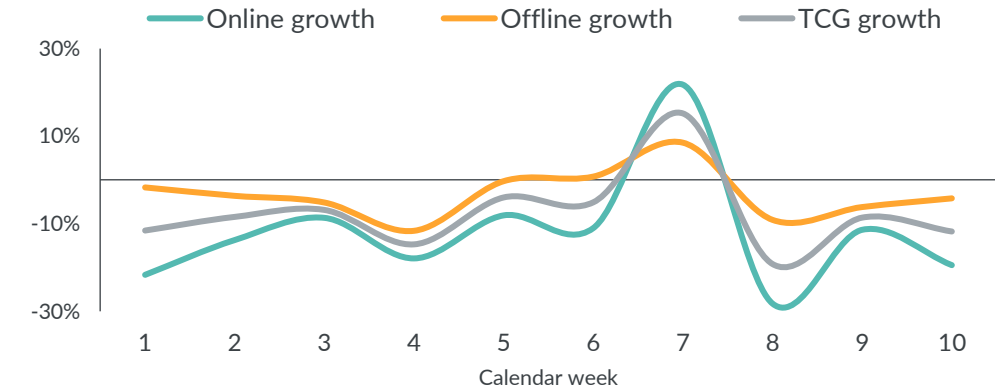
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 10 (Mar 06 – Mar 12)



- Deceleration of online sales (-19%) dragged the total TCG market down by -12%. Traditional retail fell by -4% compared to the same week last year.
- In IT/Office/Telecom mobile computing and smartphones posted the biggest declines at -21% and -20% respectively. Laser printers were down by -8% while media tablets delivered flat dynamics.
- TV sales reported the best performance with +7% growth in MDA/SDA/CE. Newly added air treatment continued falling and dropped the most at -46%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 10 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

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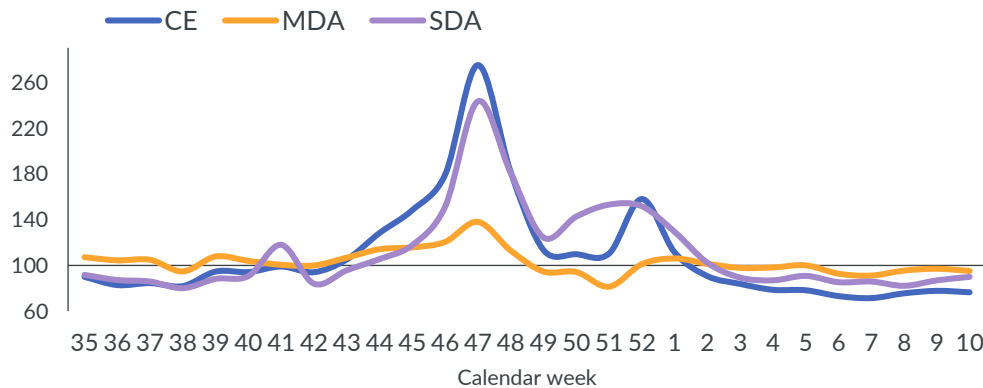
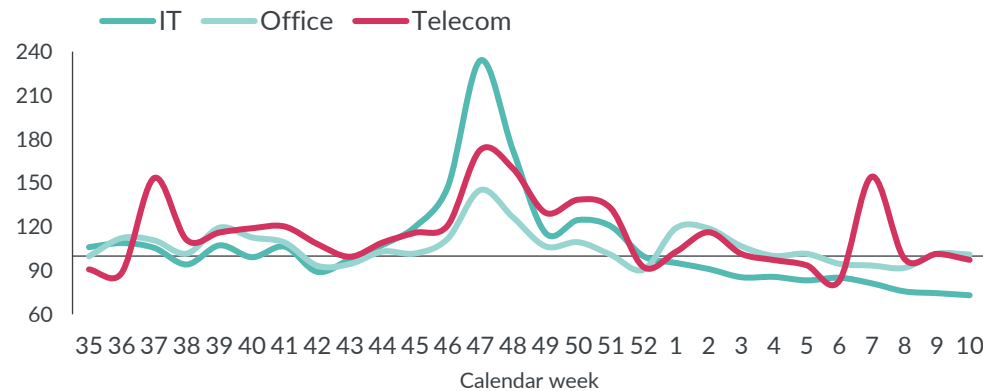
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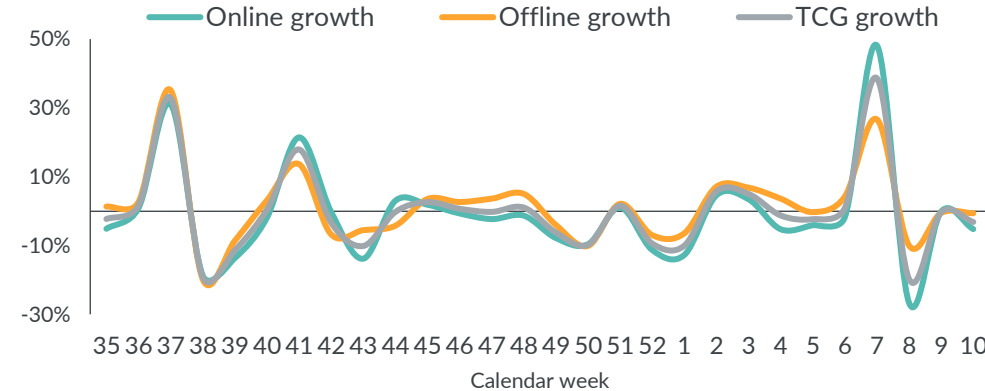
Brazil

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 10 (Mar 06 – Mar 12)



- After flat dynamics across all distribution types last week, the total TCG market delivered -3% in week 10, driven by online sales at -5%, while traditional retail declined only by -1%.
- Laser printers remained the best-performing product group in IT/Office/Telecom at +39%. Media tablets reported the opposite trend at -31%. Smartphones and headsets experienced a plus of 3%.
- The mixed picture for MDA/SDA/CE products ranged from -14% for TVs to +11% for dental care. Cooling was flat compared to the same week last year.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 10 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

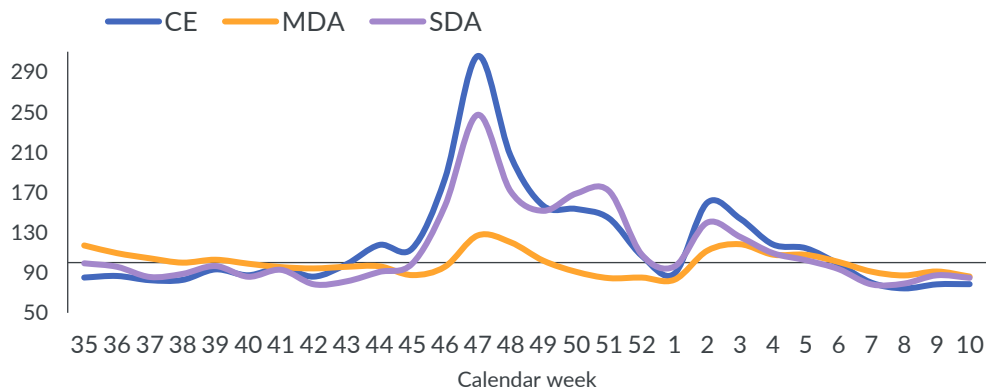
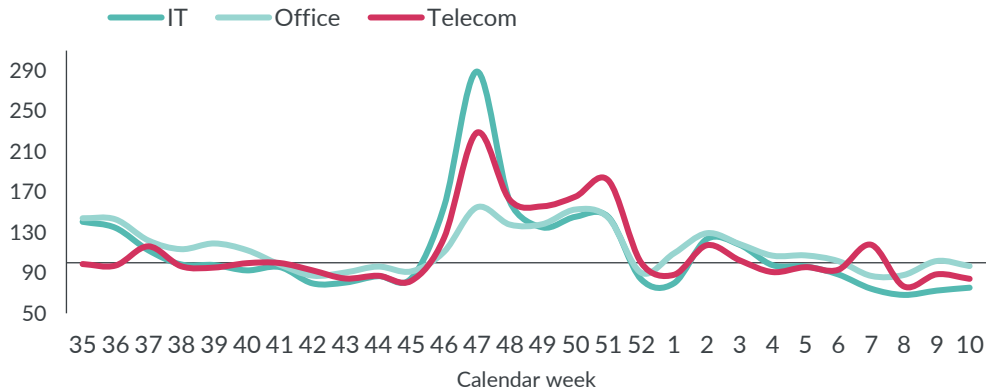
Weekly retail insights from the Point of Sale

Spotlight on France

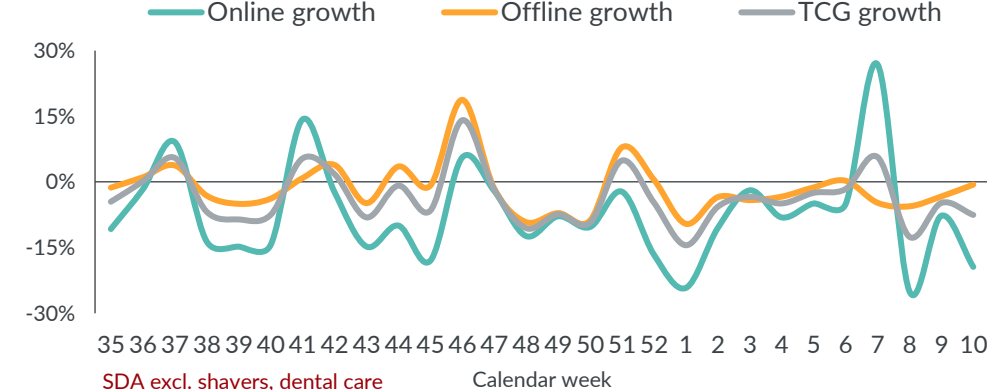


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 10 (Mar 06 – Mar 12)

- Deceleration of online sales (-19%) resulted in a downswing of the total TCG market of -8%. Traditional retail lagged at -1% vs week 10 2022.
- IT/Office products maintained negative trends except for inkjet printers and mice which grew by +7%. Smartphones delivered -21%, and headsets were up +8%.
- MDA/SDA categories saw an overall positive picture with air treatment and vacuum cleaners in the lead (+10%), while cooling was stable compared to the same week last year. CE products continued declining with TV sales losing -4%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 10 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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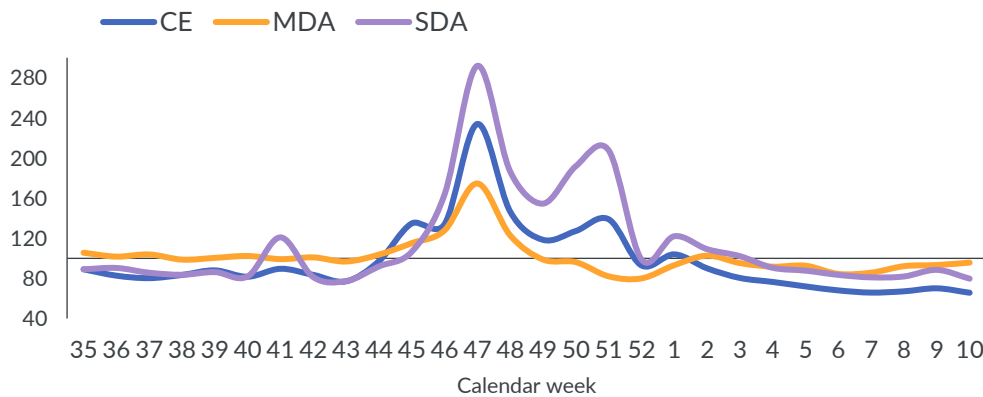
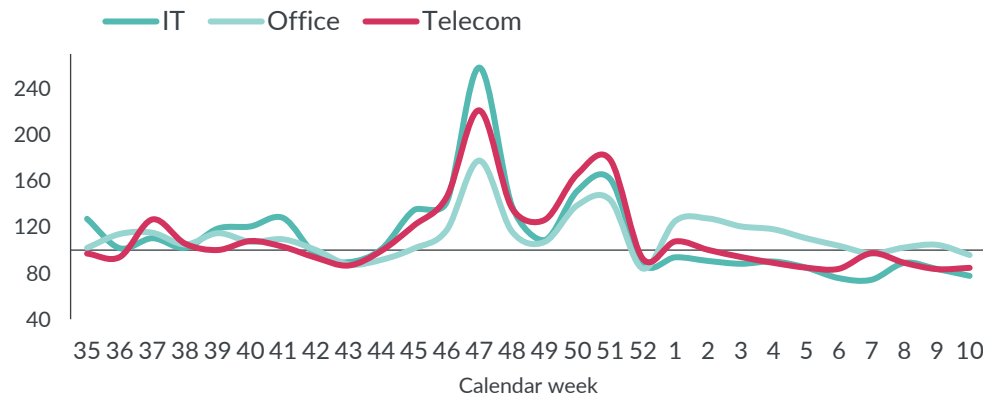
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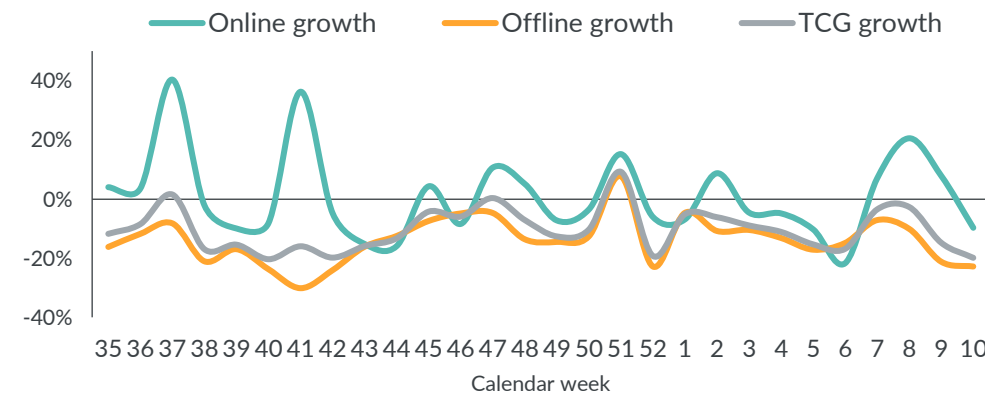
Brazil

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 10 (Mar 06 – Mar 12)



- The total TCG market lost in solid double digits vs week 10 in 2022 at -20%, driven by traditional retail posting -23%. Online sales declined by -10%.
- Except for smartphones at +4%, IT/Office/Telecom products were negative, led by desk computing at -20% and laser printers at -19%.
- CE continued delivering double-digit decreases with TVs in the lead (-63%). While MDA categories stood out with significant growth of +18% (cooling at +15%, washing machines at +20%), SDA witnessed a mixed picture, ranging from +18% for air treatment to -3% for vacuum cleaners.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 10 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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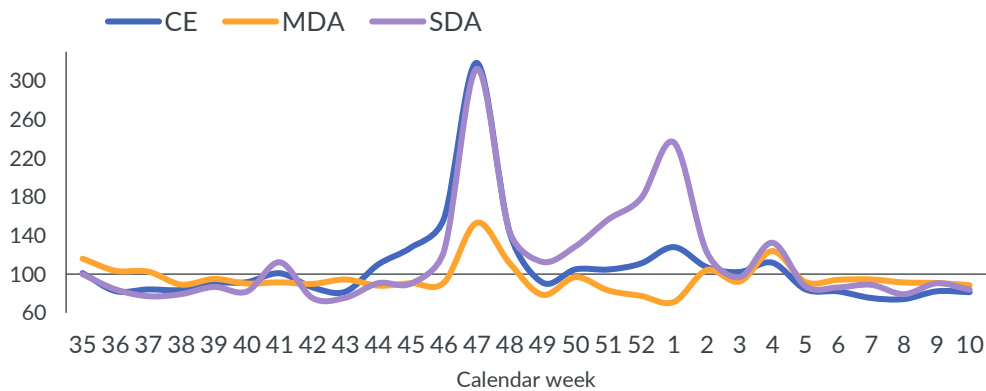
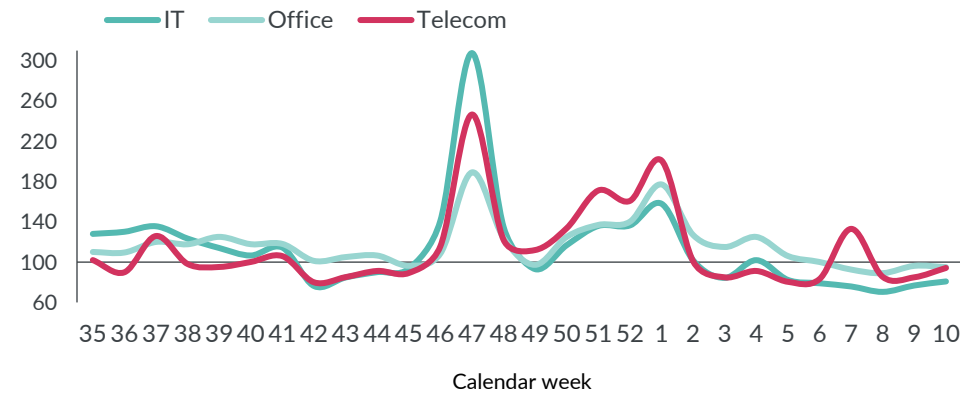
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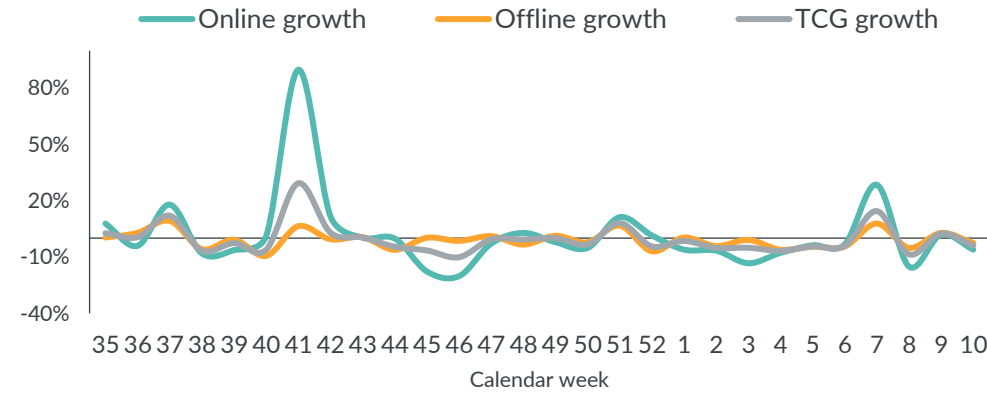
Brazil

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 10 (Mar 06 – Mar 12)



- Traditional retail experienced a minus of 3% and online sales were down by -6%, leading to a decline for the total TCG market of -4% compared to the same week last year.
- All IT products posted double-digit declines with media tablets in the lead at -27%. Telecom was the best-performing sector with smartphones at +7% and headsets at +9%.
- SDA delivered overall positive dynamics with the key driver being vacuum cleaners at +10%. MDA and CE products posted a mixed picture, ranging from +24% for soundbars to -1 for cooling. TV sales lagged at 14%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 10 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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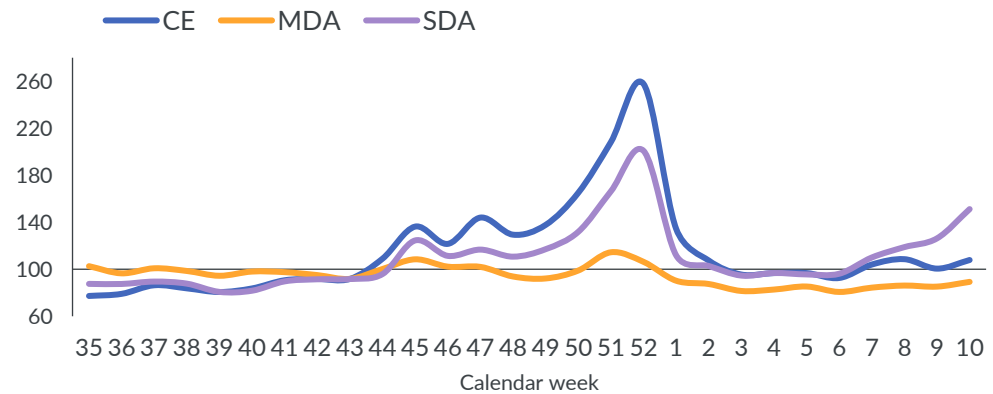
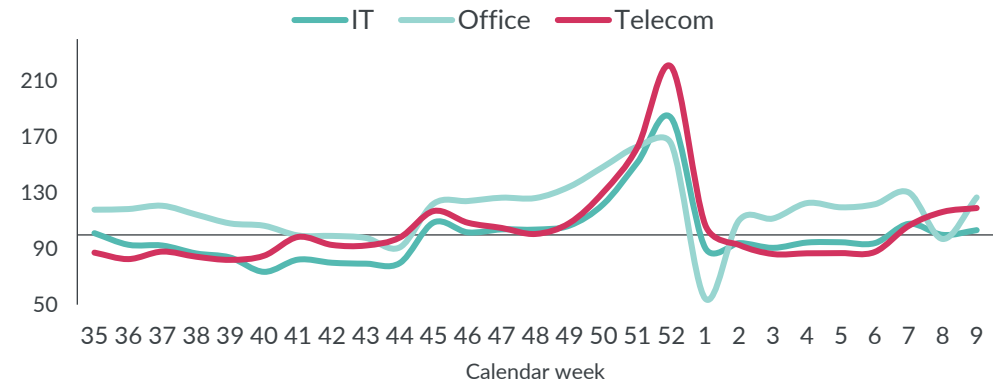
> **Russia**

Japan

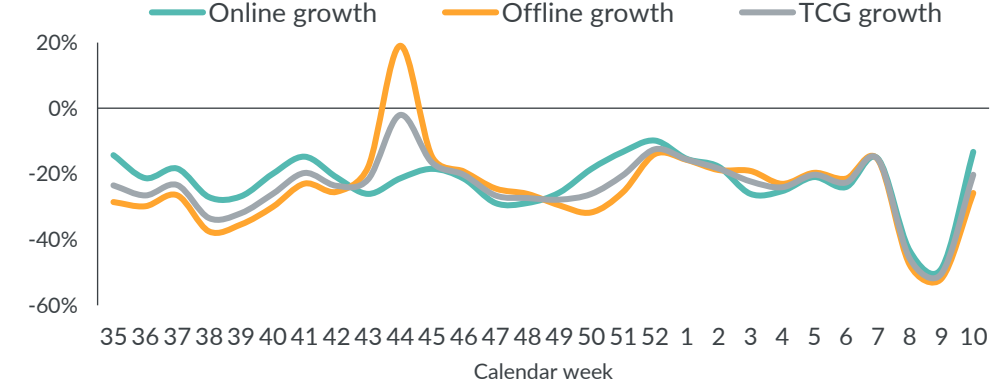
Brazil

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 10 (Mar 06 - Mar 12)



- Both distribution types dropped: online sales at -13% and traditional retail at -26%, delivering a decline for the total TCG market of 20%.
- Desk and mobile computing posted the worst performance among losing IT/Office products at -53% and -34% respectively. Only monitors were flat vs the same week last year. In comparison, Telecom (smartphones and headsets) experienced a plus of 15%.
- The overall negative picture for MDA/SDA products was led by cooling at -60% and washing machines at -55%. CE also continued its negative trend in double digits. Only audio home systems stood out with triple-digit growth.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 10 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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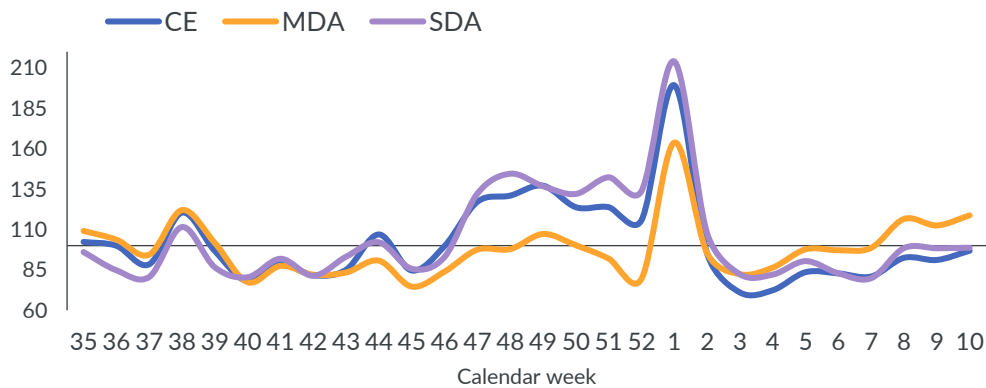
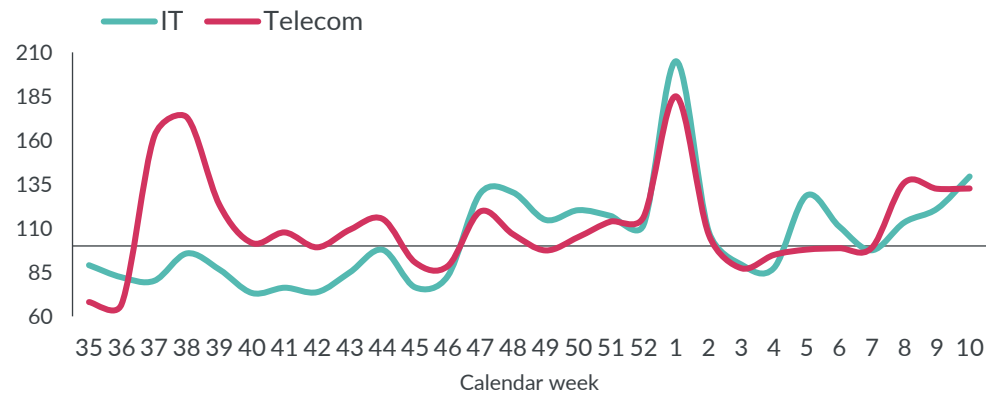
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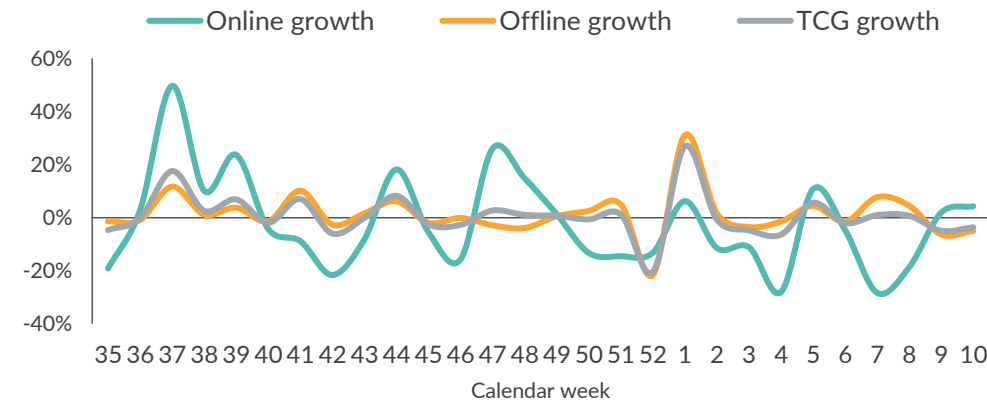
Brazil

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 10 (Mar 06 – Mar 12)



- Online sales continued recovering from +2% in week 9 to +4% this week. But the deceleration of traditional retail at -5% dragged the total TCG market down by -4%.
- Media tablets drove IT/Telecom products at +32%. Mobile computing and smartphones dropped the most at -9% and -6% respectively.
- Dental care and hot beverage makers were the best-performing categories in SDA/MDA/CE with +17% growth. Cooling and washing machines were flat vs the same week last year, while CE was mostly negative with TVs posting -14%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 10 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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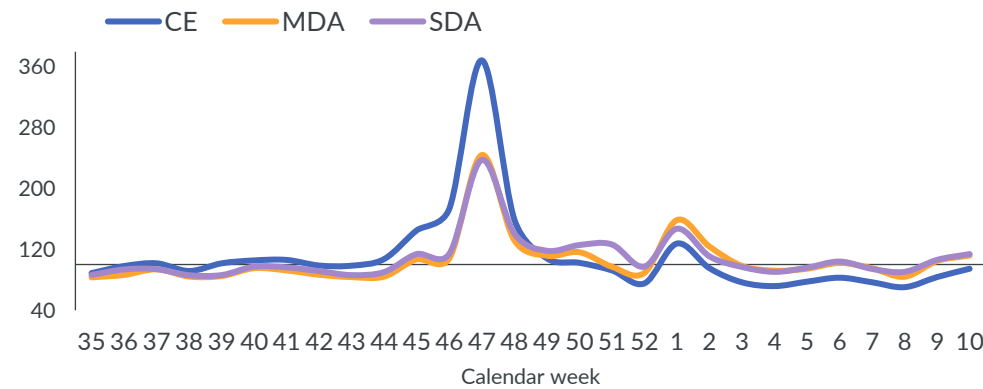
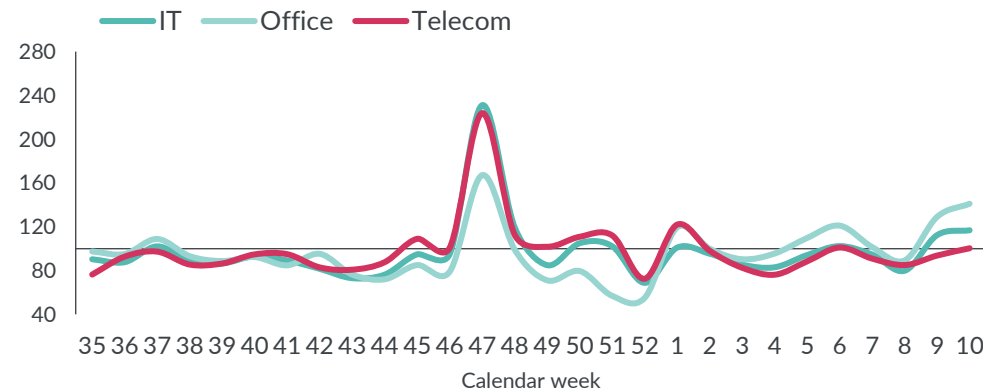
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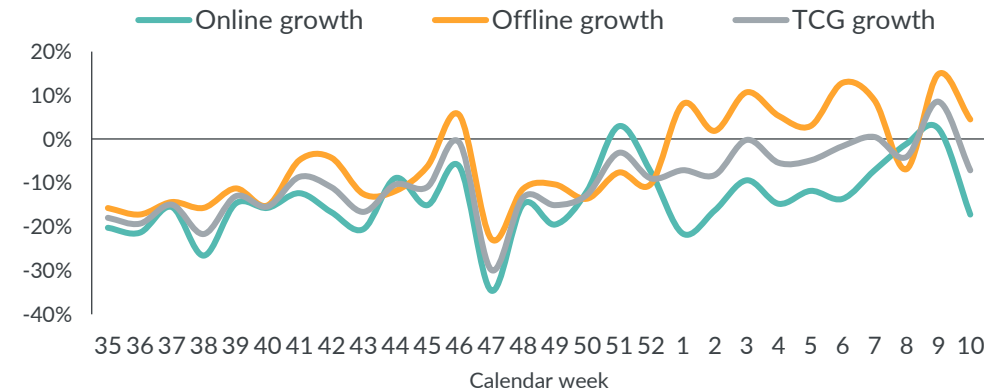
➤ Brazil

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 10 (Mar 06 – Mar 12)



- Traditional retail experienced a plus of 4% but this failed to compensate for the losses of online sales (-17%). Combined this left total TCG at a minus of 7% compared to the same week last year.
- In IT/Office/Telecom only media tablets were positive, posting +33%. While smartphones and mobile computing dropped the most by -17%, inkjet printers lagged at -5%.
- Growth rates for SDA/MDA/CE ranged from -8% for audio home systems to the drivers of this week: +16% for vacuum cleaners and +11% for washing machines. TVs delivered +7%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 10 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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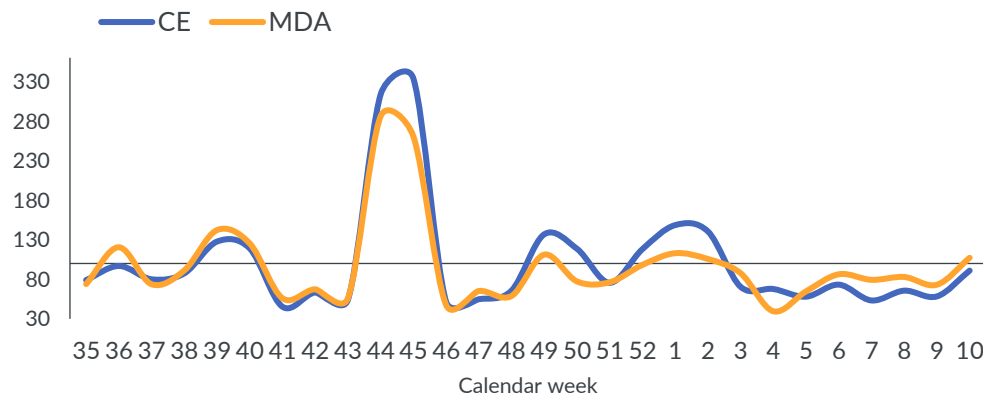
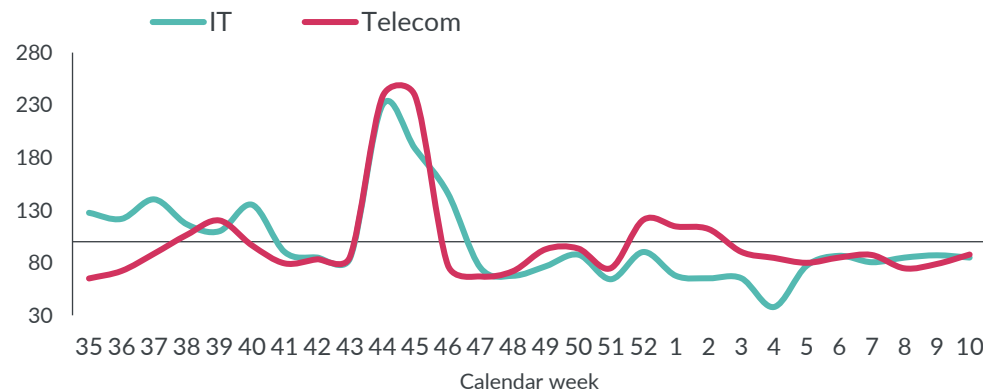
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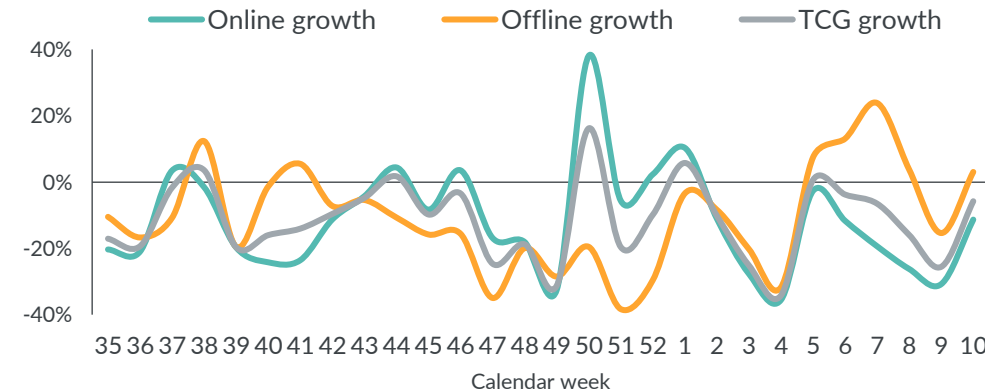
Brazil

> 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 10 (Mar 06 – Mar 12)



- The decline of online sales at -11% resulted in a downswing for the total TCG market of -6%. In contrast, traditional retail delivered +3% vs week 10 2022.
- Mobile PCs and smartphones reported a negative trend, posting -11% and -3% correspondingly.
- MDA/CE categories were also in decline: washing machines at -15%; cooling at -8% and TVs at -4%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 10 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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