



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 149

cw11/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

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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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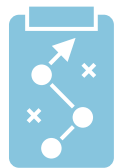
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Fact of the Week

After weak performance in the first half 2022, online retail began recovering at the end of the year



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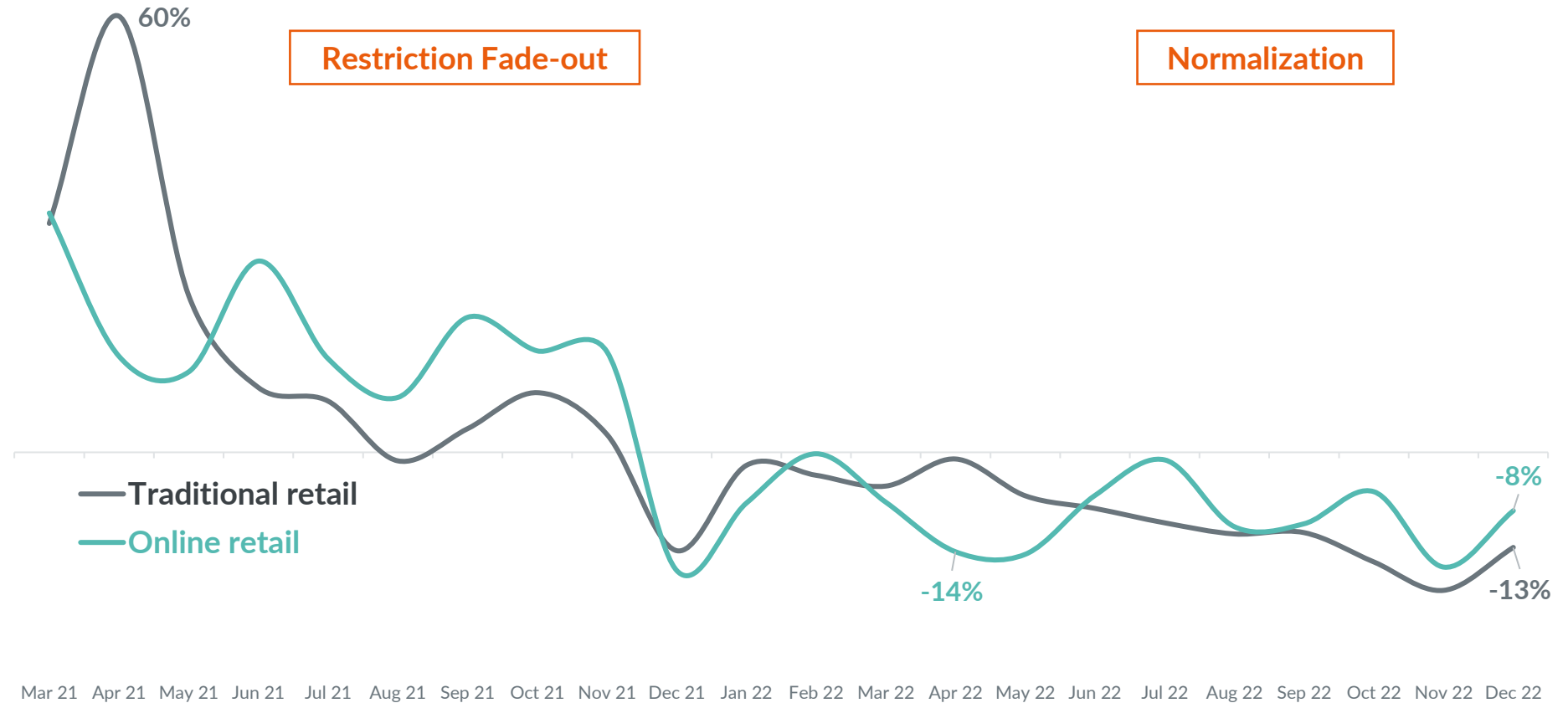
Japan

Brazil

China

Key Technical Consumer Goods product groups

GfK B2C Retailer Market | Technical Consumer Goods | Sales Value USD (NSP) in Mio. | Growth rate PY +/- %



Weekly retail insights from the Point of Sale

Spotlight on Germany



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> **Germany**

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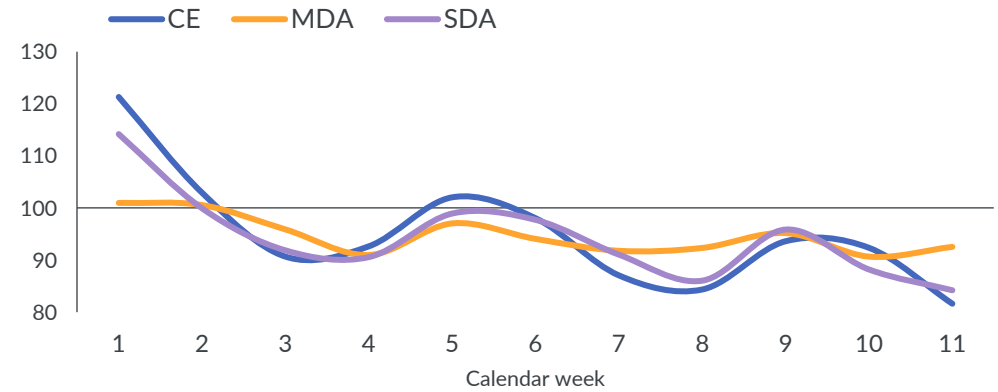
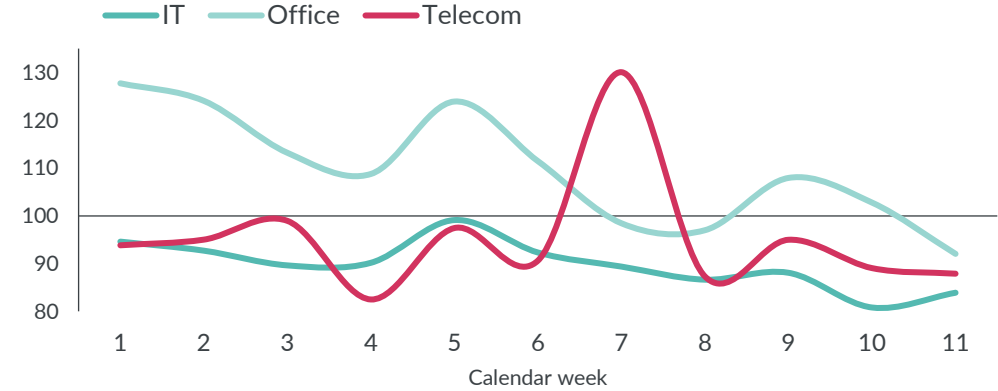
Japan

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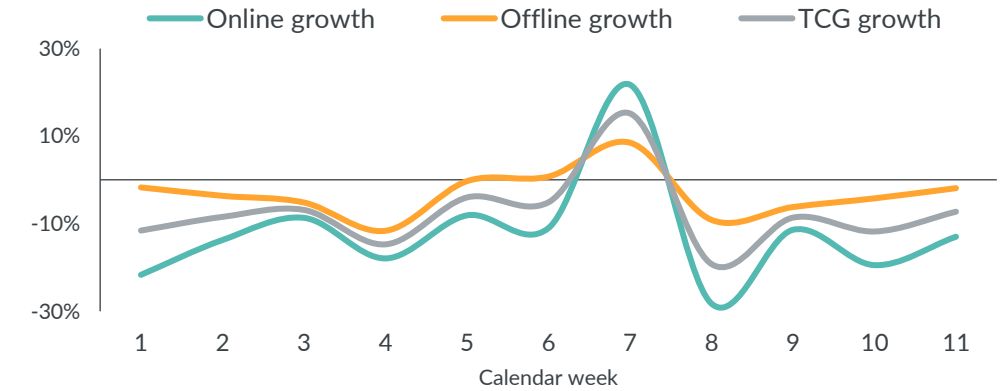
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 11 (Mar 13 – Mar 19)

- The total TCG market (including air treatment) dropped by -7%, driven by online sales at -13%. Traditional retail lagged at -2%.
- Except for media tablets with flat dynamics (+1%), IT products were negative, led by mobile computing at -20%. Laser printers were up by +7%. Smartphones decelerated at -8% versus the same week last year.
- While soundbars and audio home systems posted moderate growth, TV sales decreased by -2%. Dental care and vacuum cleaners were the only positive categories in MDA/SDA at +10% and +4% respectively. Newly added air treatment remained the worst-performing product group at -42%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 11 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.

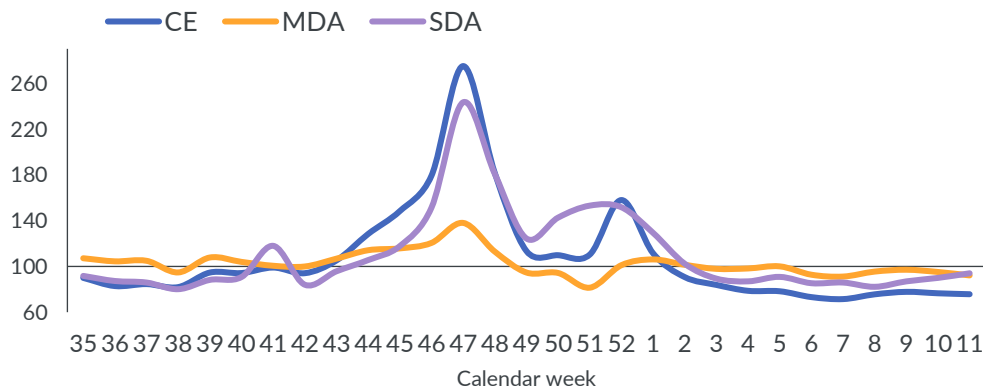
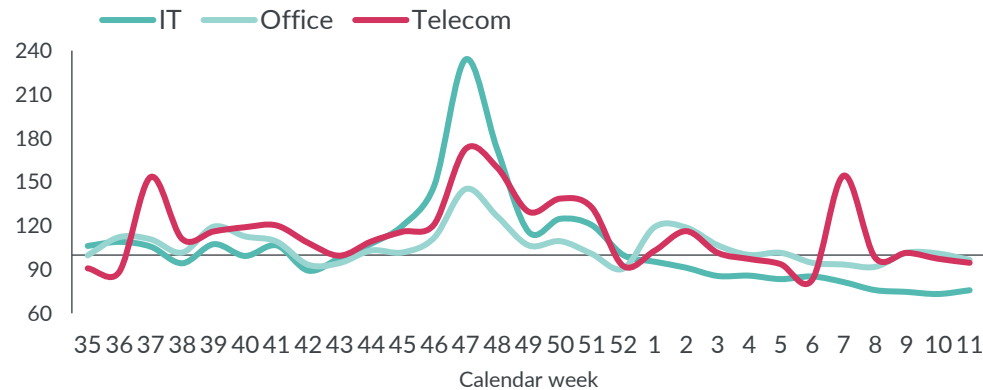
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

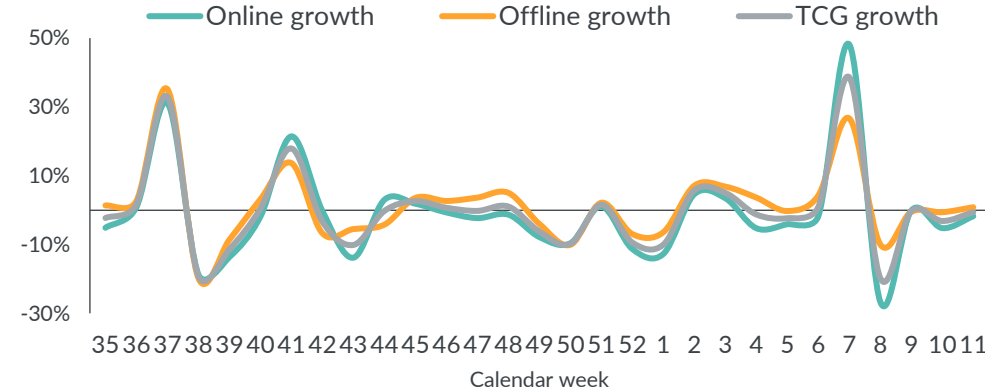


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 11 (Mar 13 – Mar 19)

- The total TCG market posted -1% due to weak online sales (-2%). A moderate growth of traditional retail (+1%) was unable to compensate for the losses.
- Laser printers were again the best-performing product group in IT/Office at +38%, while desk computing and media tablets registered the opposite dynamics at -29% and -27% respectively. Headsets accelerated at +13% and smartphones at +7%.
- The CE sector declined in double-digits, led by TV sales losing -15%. All MDA/SDA categories were positive, ranging from hot beverage makers in the lead (+25%) to flat sales for cooling.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 11 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

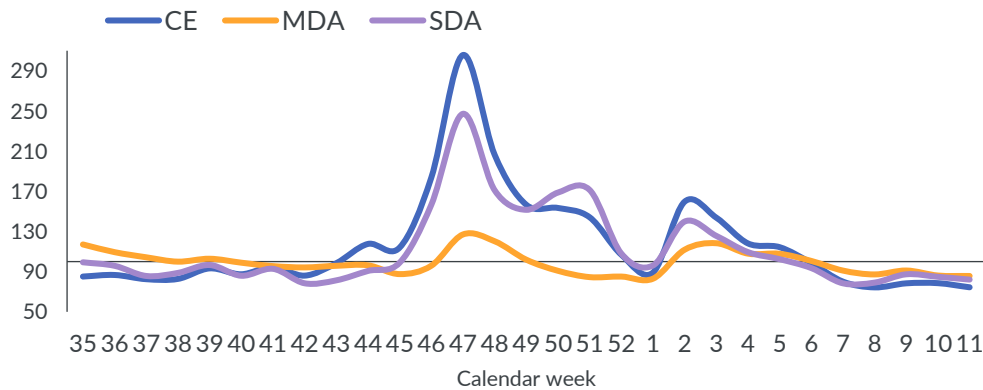
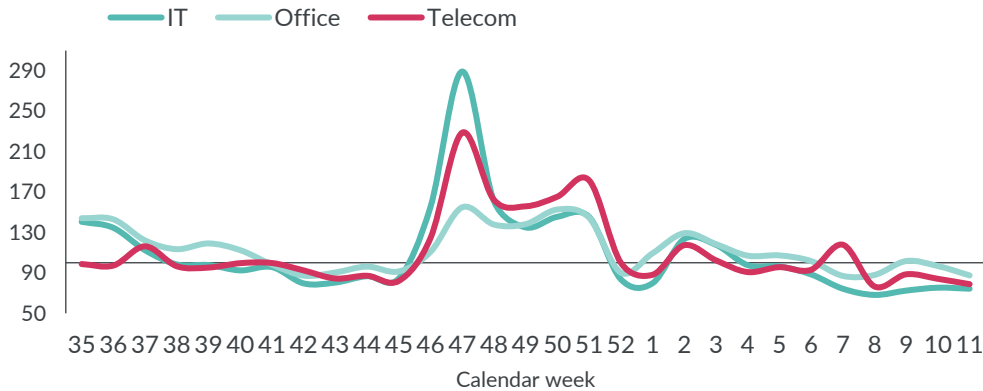
Weekly retail insights from the Point of Sale

Spotlight on France

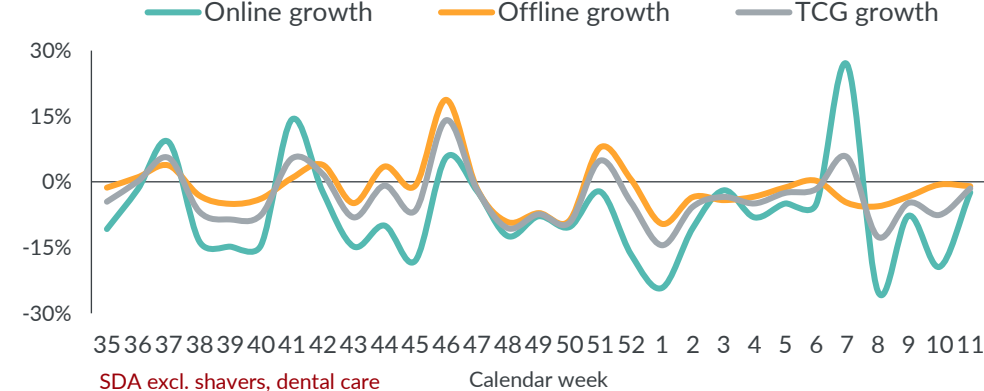


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 11 (Mar 13 - Mar 19)



- Online sales delivered -2% and traditional retail was down -1%. This caused a downswing of the total TCG market of -1% compared to the same week last year.
- A mixed picture for IT/Office products saw desk computing at -35% and inkjet printers at +5%. Smartphones lagged at -6%, while headsets were up +23%.
- Vacuum cleaners was the best-performing product group across MDA/SDA at +14%, while cooling and washing machines experienced a plus of 2% and 6% respectively. TV sales decelerated at -1%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 11 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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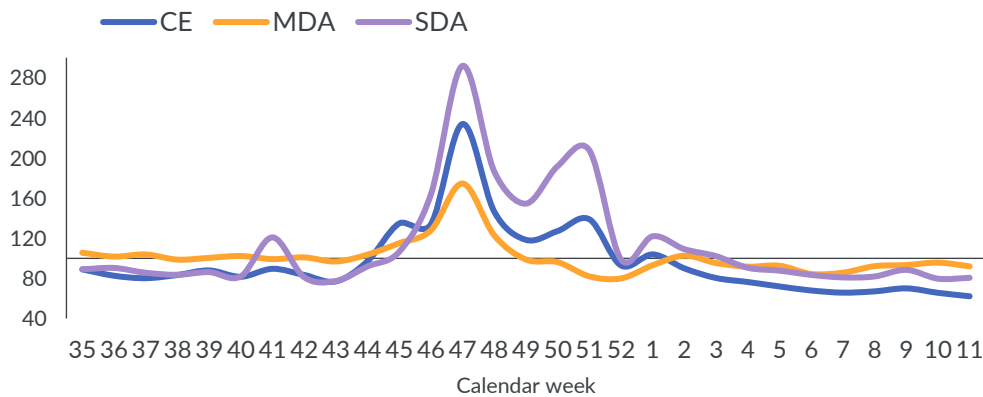
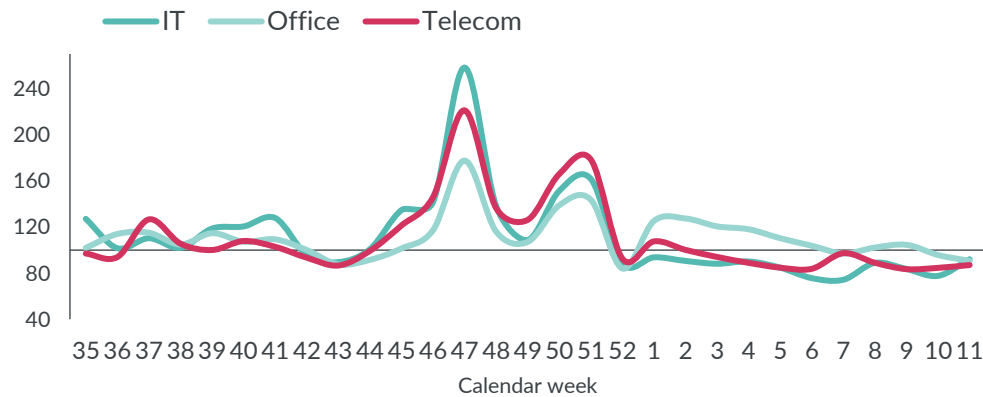
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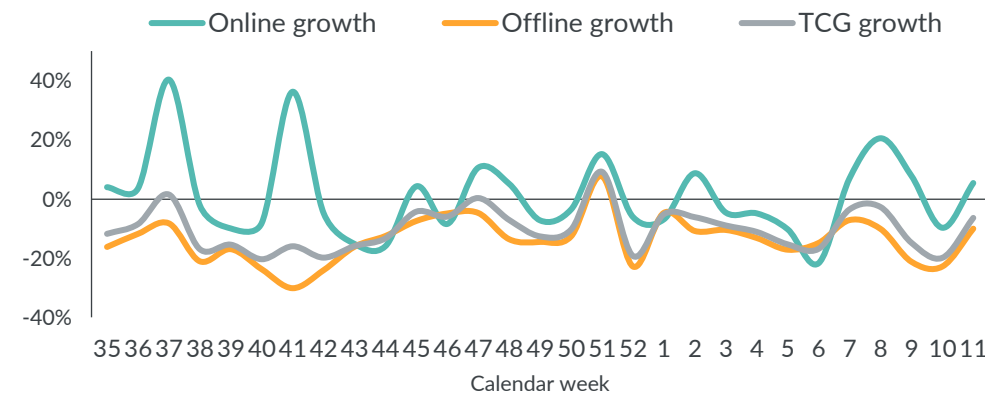
Brazil

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 11 (Mar 13 - Mar 19)



- A deceleration of traditional retail (-10%) dragged the total TCG market down by -6%. Online sales (+5%) failed to compensate for the losses.
- Except for mobile computing at +8%, all other IT/Office products posted negative trends, led by laser printers at -21%. Smartphones stood out at +9% compared to the same week in 2022.
- While CE categories were negative led by TVs at -48%, it was a different scenario for the MDA/SDA categories where cooling, shavers and washing machines posted solid increases of +21%, +17% and +16% respectively.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 11 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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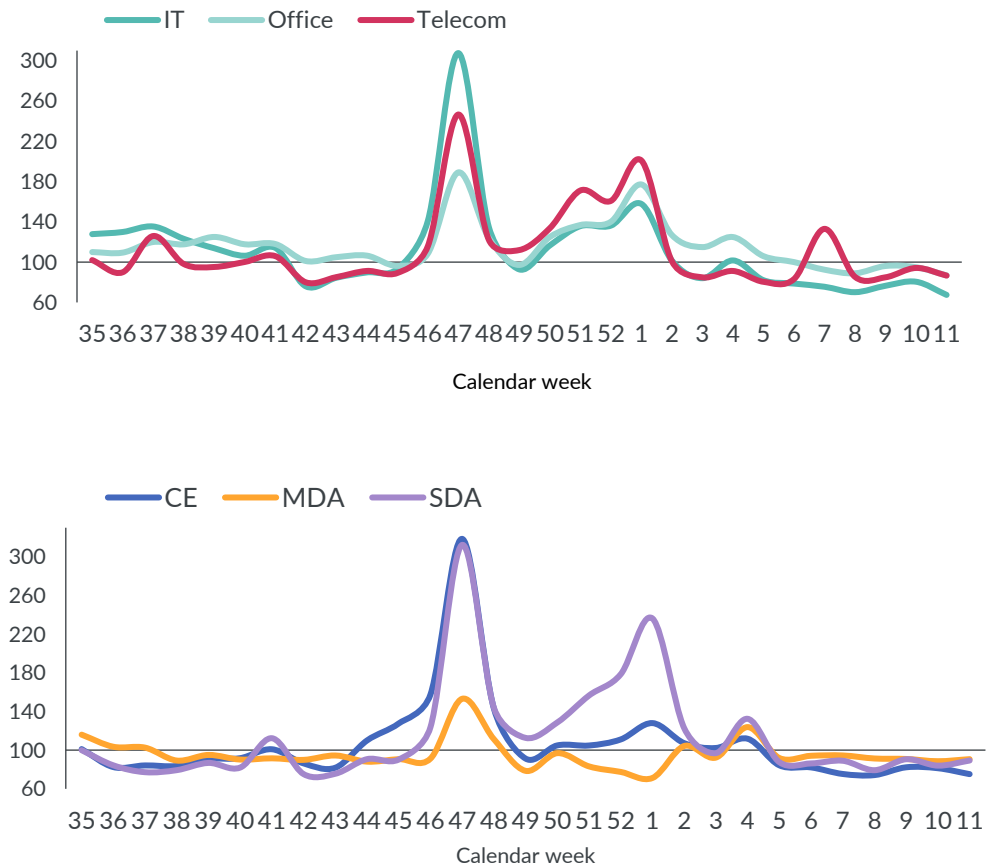
Russia

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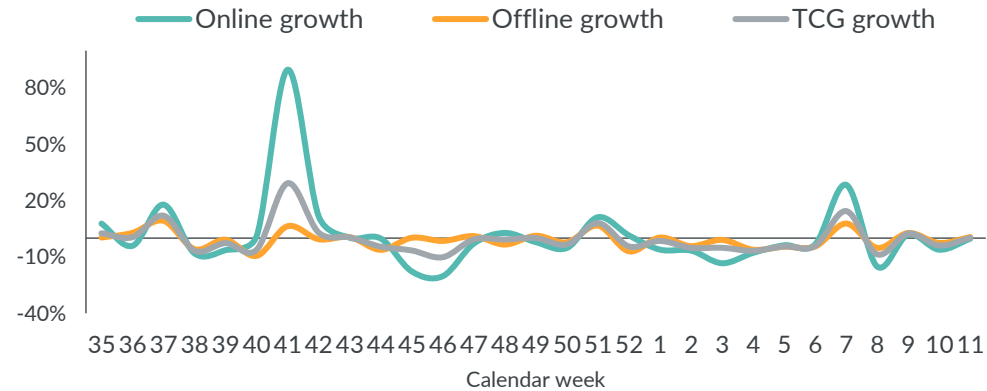
Brazil

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 11 (Mar 13 – Mar 19)



- The total TCG market delivered flat dynamics as did online sales. Traditional retail posted moderate growth of +1%.
- IT products reported double-digit declines, while laser and inkjet printers lagged at -9% and -8% respectively. Only Telecom experienced a plus where both smartphones and headsets grew by +4%.
- MDA/SDA products were up with vacuum cleaners in the lead at +25%. Both cooling and washing machines expanded by +17%. TV sales lagged at -5% compared to the same week last year.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 11 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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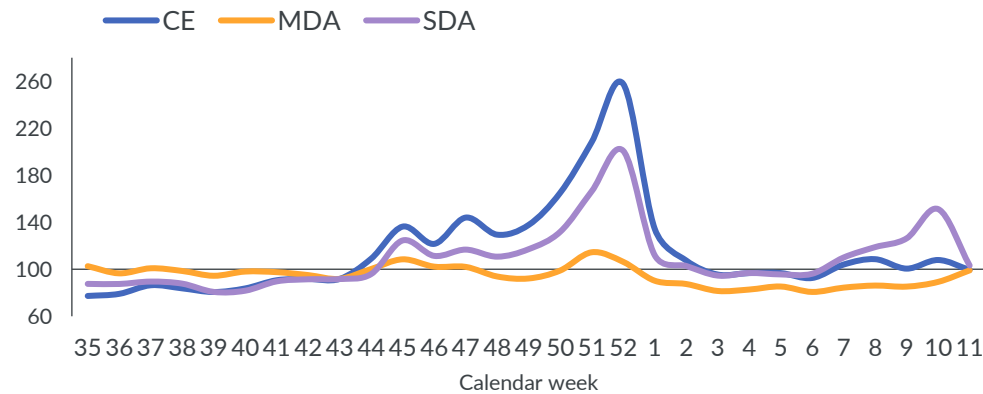
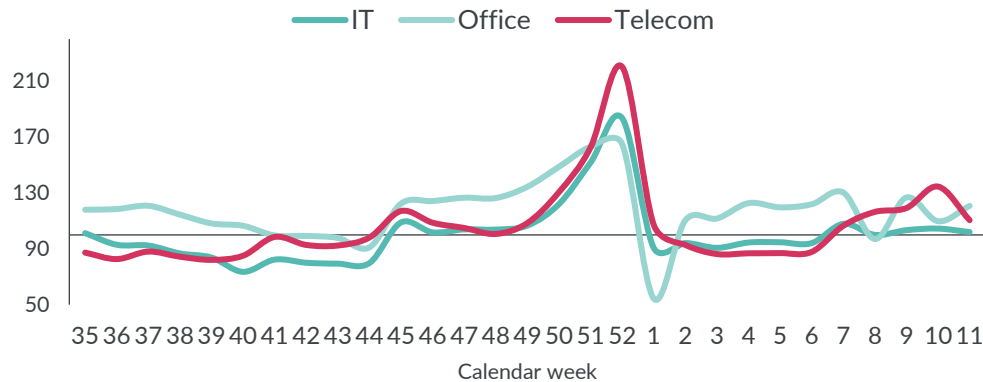
> **Russia**

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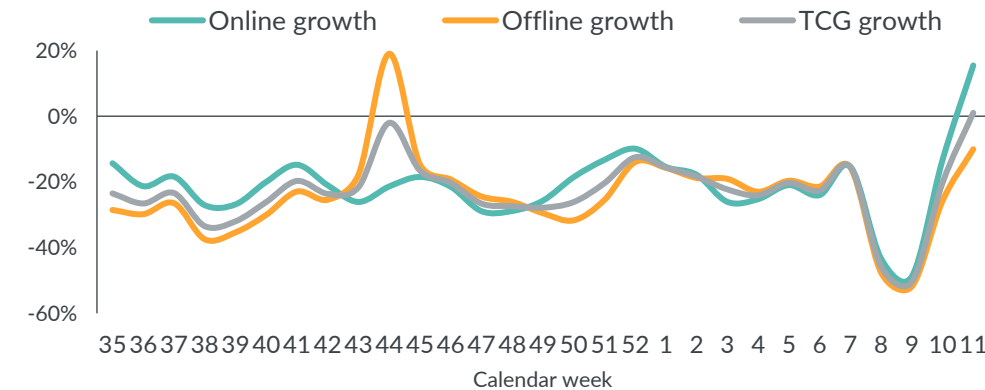
Brazil

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 11 (Mar 13 - Mar 19)



- Online sales experienced a plus for the first time this year (+15%). Combined with the slowed decline of traditional retail by -10%, the total TCG market finally registered growth, albeit a modest one of +1%.
- Desk computing was the worst-performing product group among the IT/Office/Telecom categories, losing -20%. In comparison, monitors led the sector at +42%. Smartphones stood out at +35%.
- MDA/SDA/CE saw negative dynamics except for audio home systems which kept triple-digit growth, and vacuum cleaners posting +7%. Cooling and washing machines fell the most by -39% and -32% respectively. TVs lagged at -23%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 11 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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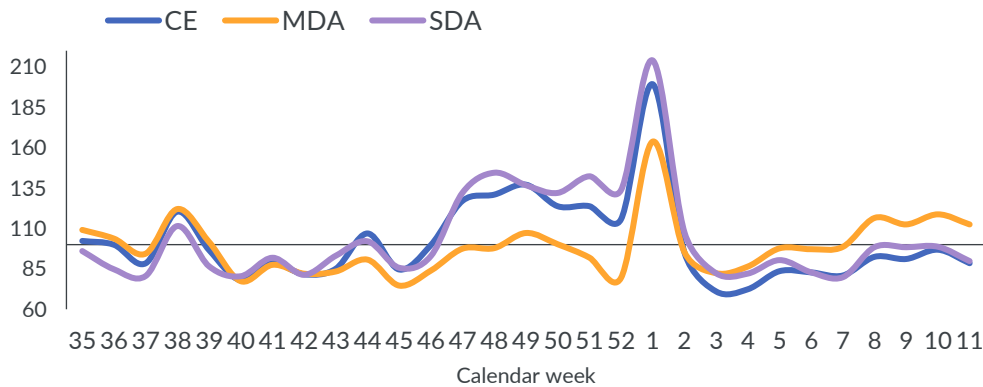
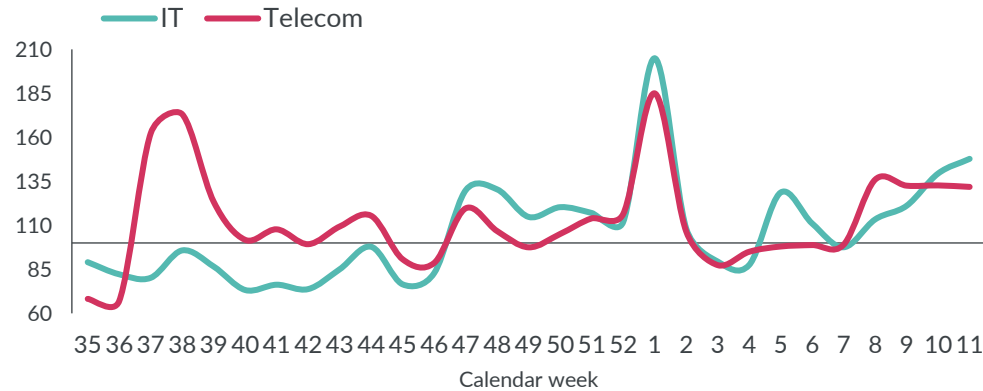
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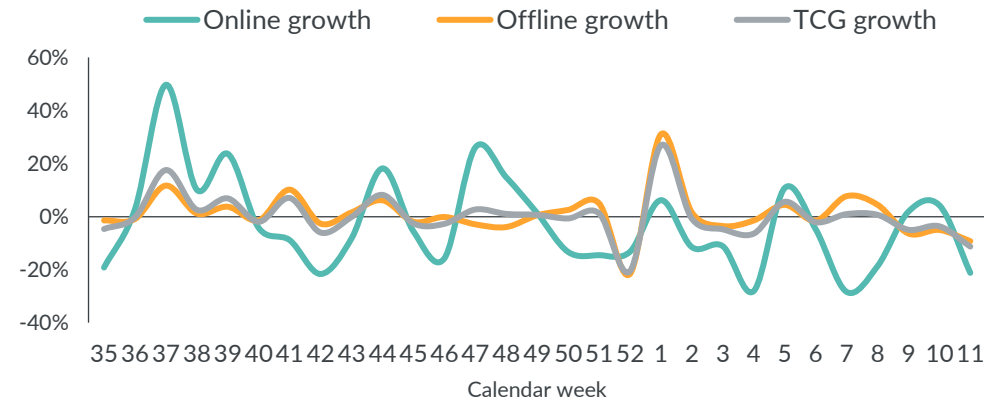
Brazil

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 11 (Mar 13 – Mar 19)



- Both distribution types dropped: online sales at -21% and traditional retail at -9%, delivering a decline for the total TCG market of -11%.
- Only media tablets were flat. Other IT/Telecom categories witnessed negative trends with smartphones in front at -18%. Mobile computing posted -7% compared to the same week in 2022.
- CE/MDA products were in decline with the worst performance of TVs and audio home systems posting -24% and -27% respectively. The mixed picture for SDA was led by shavers at +6, while food preparation and air treatment brought up the rear at -17%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 11 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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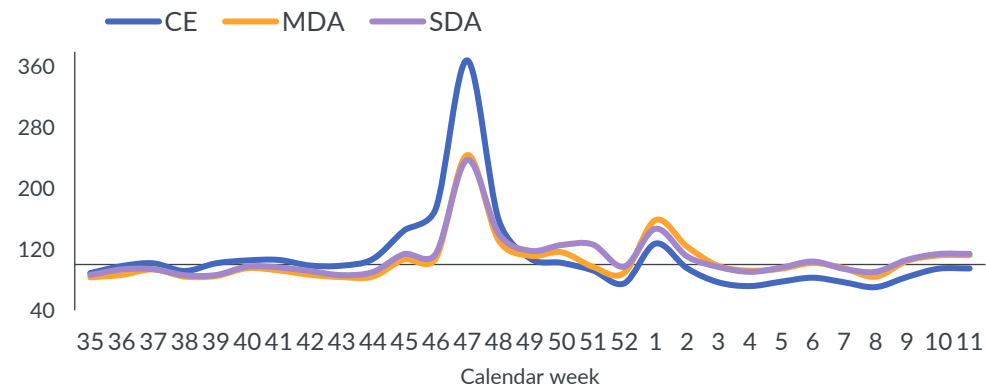
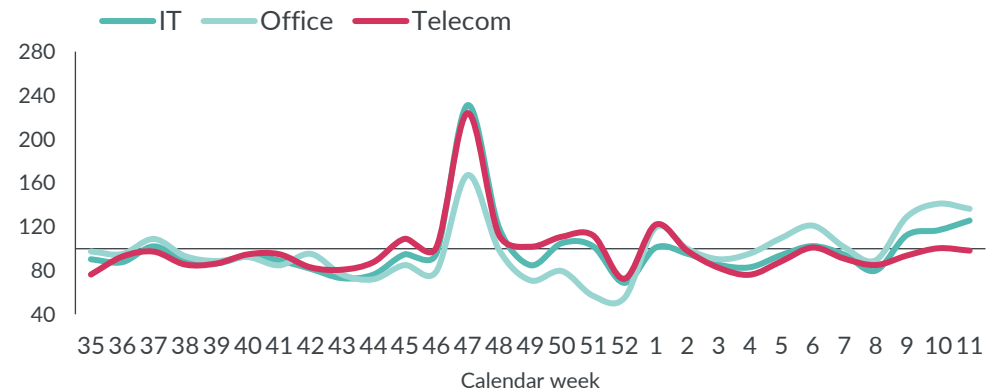
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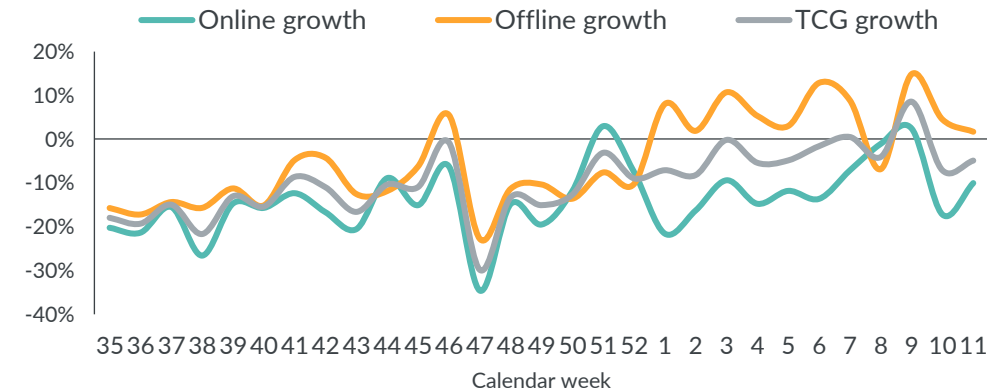
➤ Brazil

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 11 (Mar 13 – Mar 19)



- Traditional retail grew by +2%, but this failed to compensate for the losses of online sales (-10%) and left total TCG at a minus of 5% vs week 11 2022.
- Media tablets drove IT/Office/Telecom categories at +48%, laser printers also experienced a plus of 19%. Smartphones lagged at -14%.
- MDA/SDA/CE product groups delivered an overall positive picture with hot beverage makers in the lead at +37% and vacuum cleaners at +20%. TV sales were flat (+1%). Only audio home systems (-14%) and cooling (-1%) posted negative trends.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 11 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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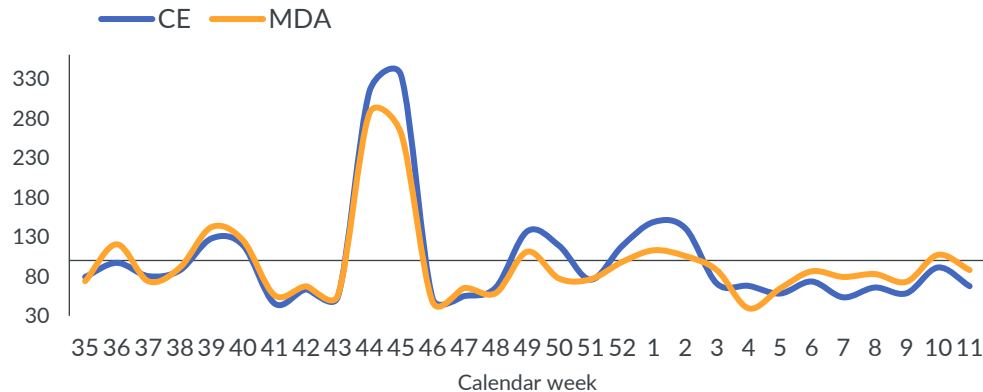
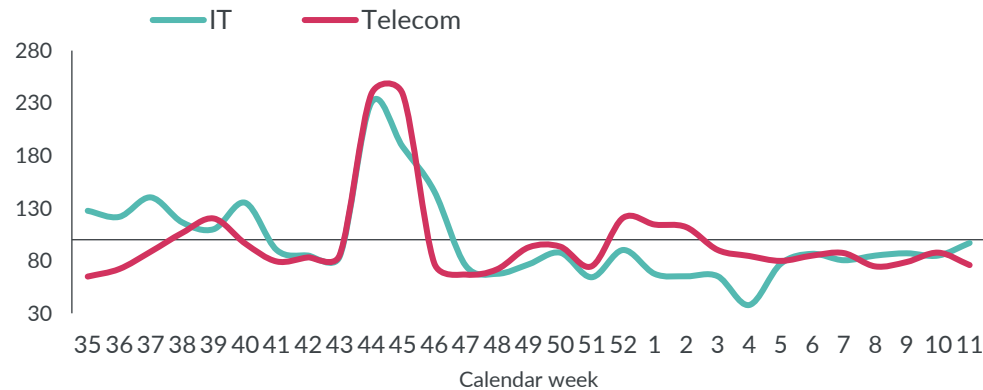
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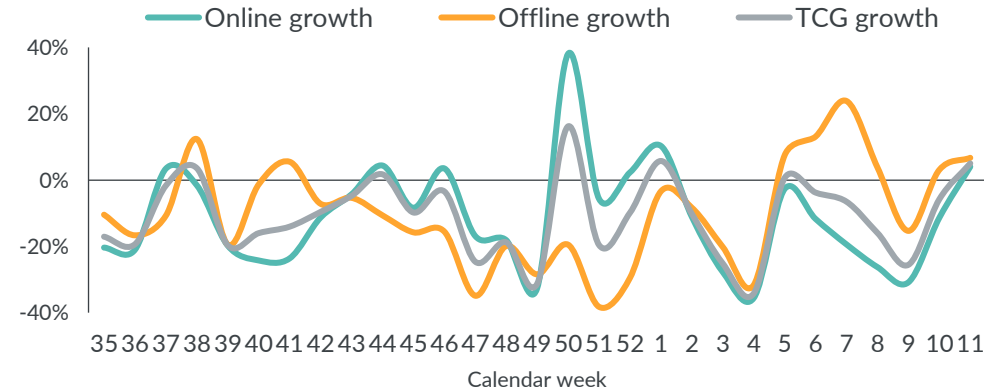
Brazil

> 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 11 (Mar 13 – Mar 19)



- The strong recovery of traditional retail at +7% led to an uptick for the total TCG of +5% when combined with stronger online sales of +4% versus the same week last year.
- Mobile PCs accelerated at +26%. Smartphones delivered a modest decline of -1%.
- Week 11 in 2023 saw a solid increase for cooling (+14%). Washing machines at +9% and TVs at +5% also posted positive trends.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 11 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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