



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 150
cw14/2023

Powered by **gfknewron**

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Get quick, easy and comprehensive access to your business intelligence



> 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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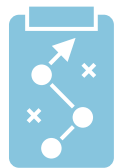
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

MDA: Feature trends continue, premium features in high demand, but growth slows down.



About **gfknewron**

Market drivers by product segment
growth rate USD vs PY in %

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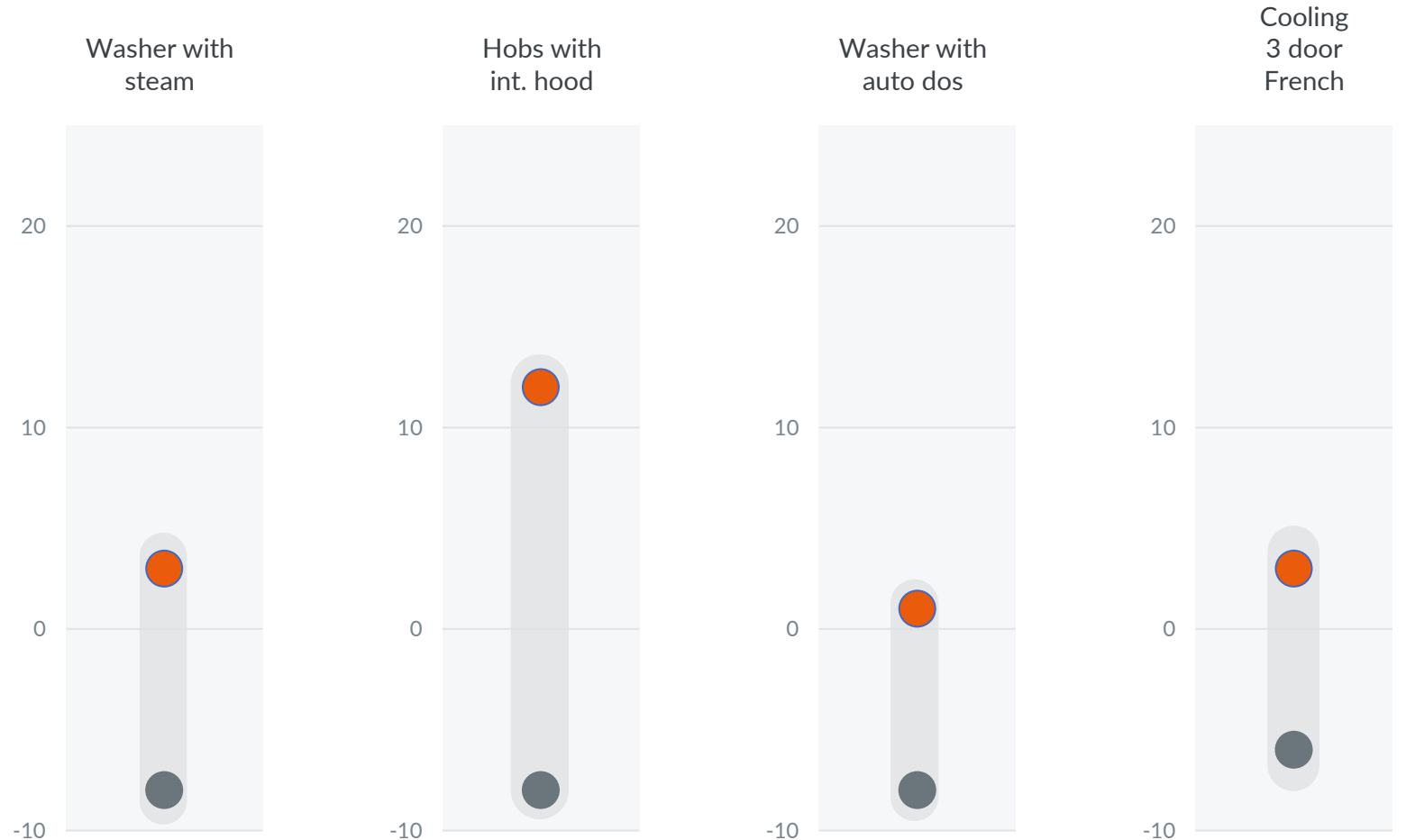
China

**"It is important to
indulge or pamper
myself on a regular
basis."**

42% ↑
global respondents agreeing

● Segment

● Product Group



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

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Spain

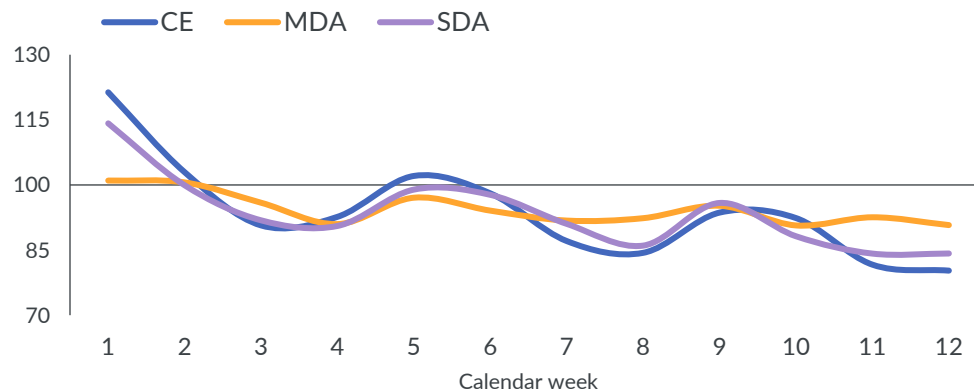
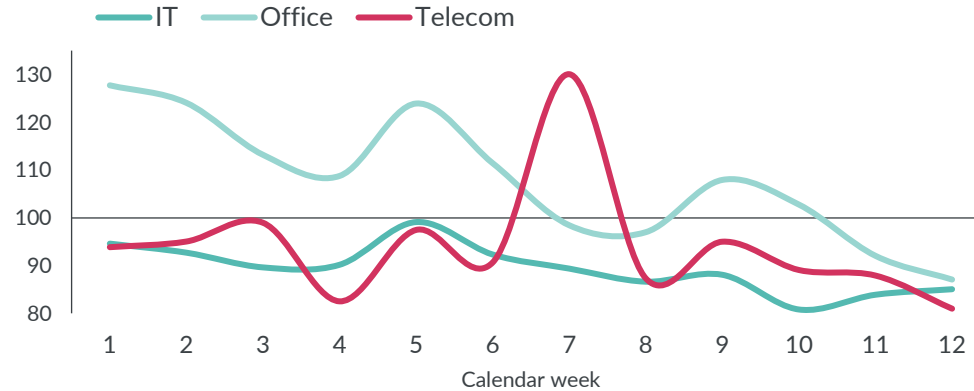
Russia

Japan

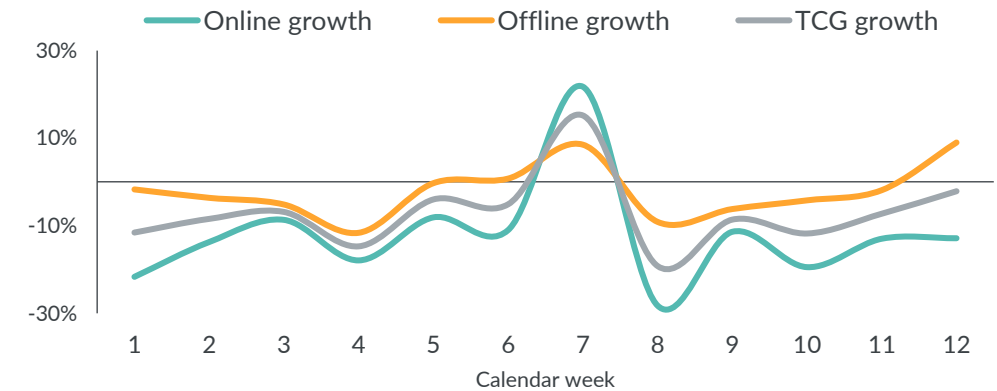
Brazil

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 12 (Mar 20 – Mar 26)



- The total TCG market dropped by 2%, driven by online sales at -13%. Traditional retail at +9% could not compensate.
- Except for media tablets at +6%, IT products were negative, led by desk computing at -14%. Laser printers were up by 20%. Smartphones posted flat dynamics (-0.9%).
- Soundbars accelerated at +24% in week 12 versus the same week last year. TVs posted moderate growth of +8%. Food preparation was the weakest product group within SDA at -59%, followed by air treatment at -35%. Washing machines were flat.

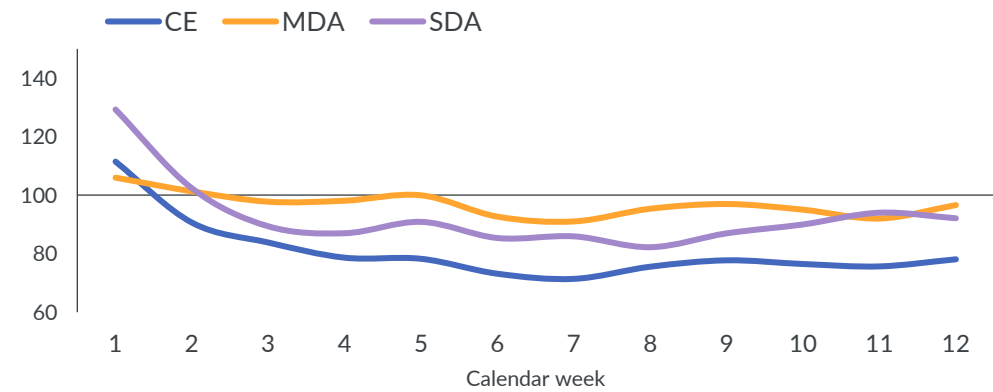
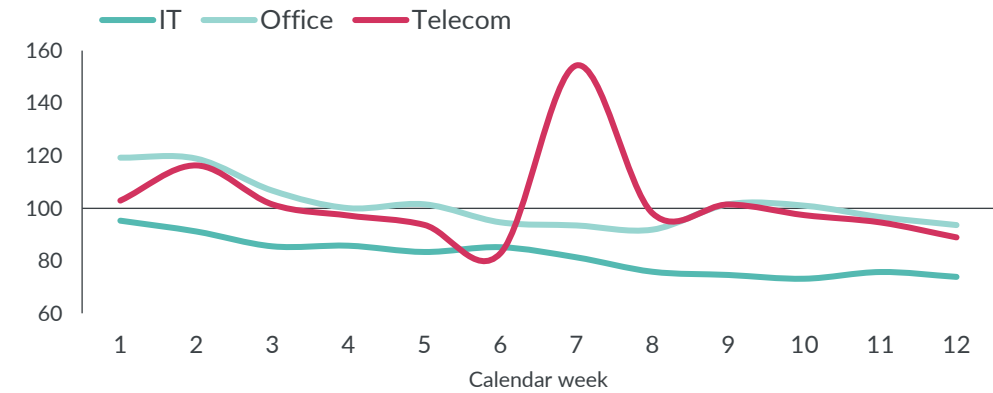
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

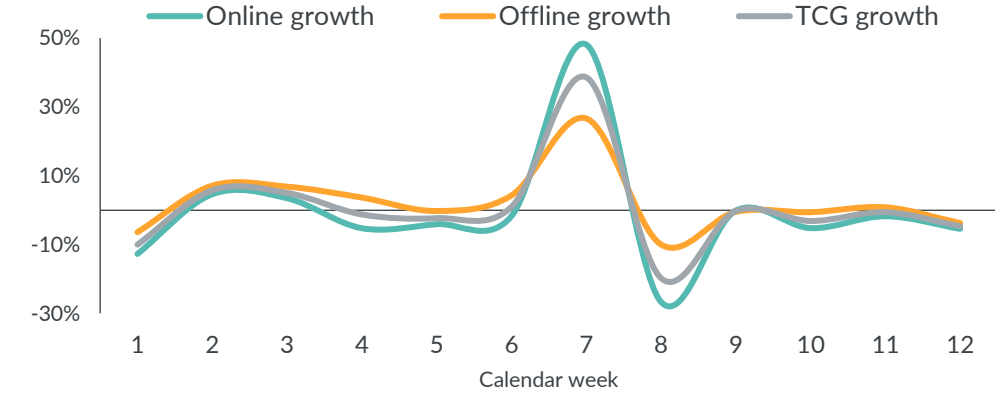


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain**
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

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 12 (Mar 20 – Mar 26)

- Similar rates of -4% for traditional retail and -5% for online sales dragged the total TCG market down by 5%.
- Laser printers were the best-performing product group in week 12 at +16%. IT categories were negative throughout, led by media tablets and desk computing at -30% and -28% respectively. Smartphones decelerated at -5%.
- The CE sector declined by 5% led by TV sales losing -6%. All MDA/SDA categories were positive, ranging from dental care ahead (+15%) to flat sales for shavers (+0.1%).

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 12 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

> France

Italy

Spain

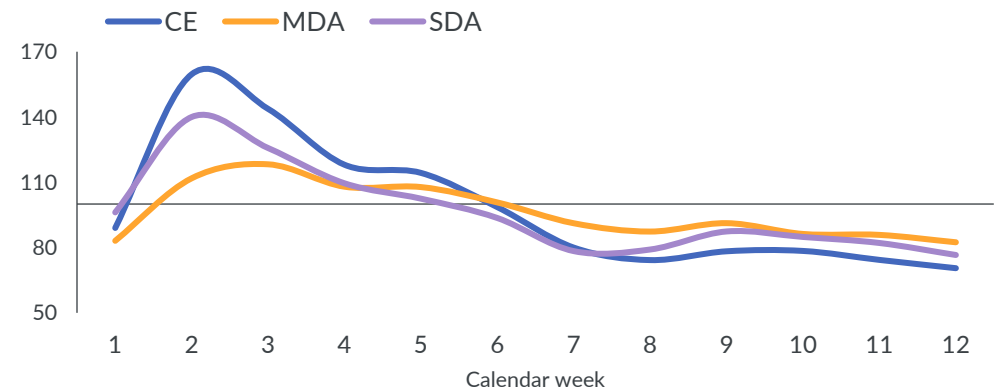
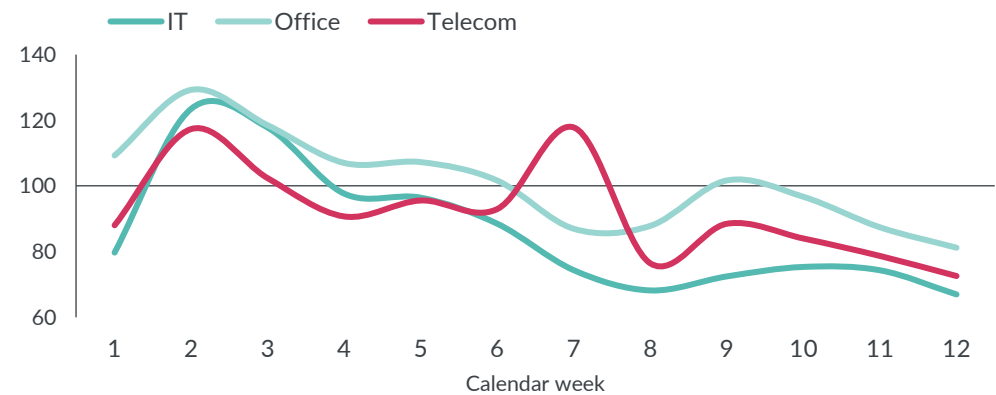
Russia

Japan

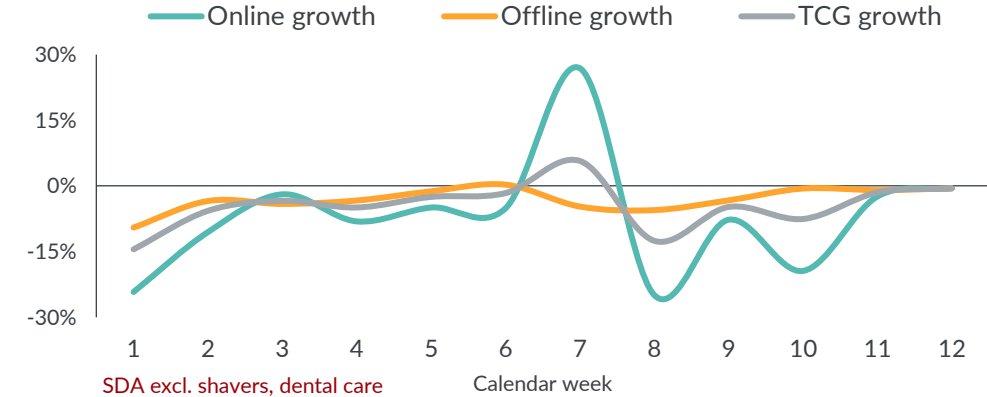
Brazil

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 12 (Mar 20 - Mar 26)

- At an identical rate of -1%, both traditional retail and online sales retail dragged the total TCG market down by -1%.
- IT/Office products posted negative trends except for mice at +8% and inkjet printers at +10%. The weakest product group was desktop computers at -32%. While smartphones lagged at -6%, headsets were up 19%.
- Except for a moderate loss of 2% for hot beverage makers, MDA/SDA products posted positive growth rates. Air treatment took the lead at +65%. Cooling was flat. TV sales were up 5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 12 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): 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



About **gfknewron**

Fact of the week

Germany

Great Britain

France



Italy

Spain

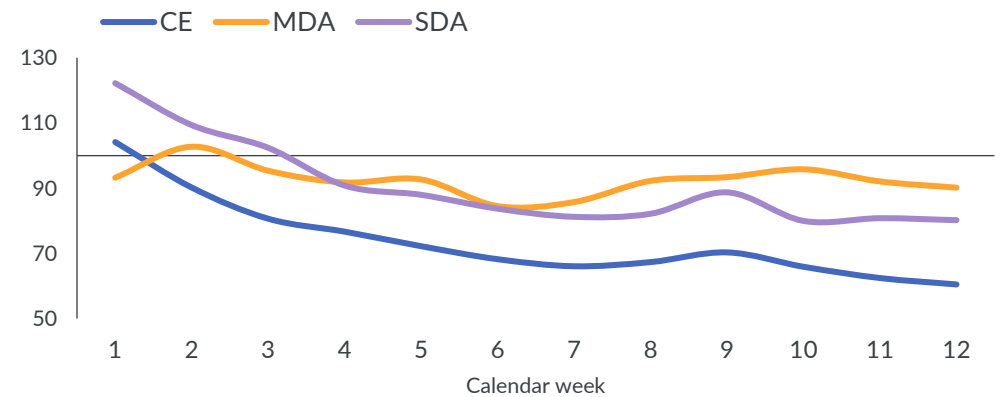
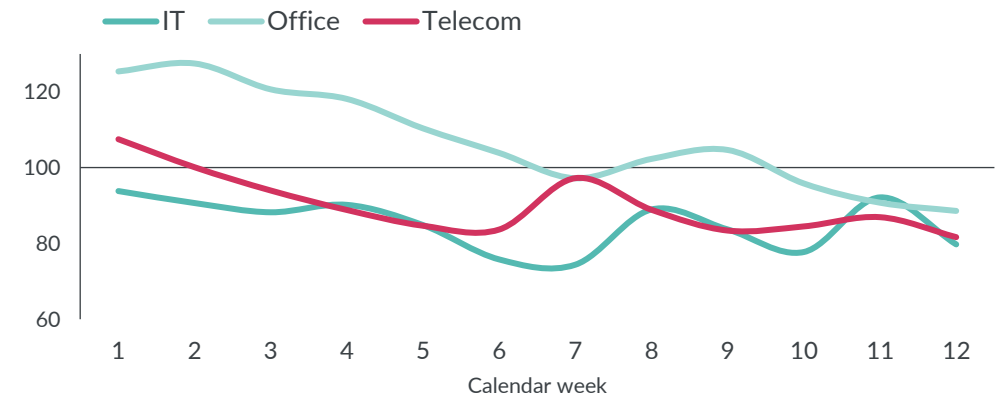
Russia

Japan

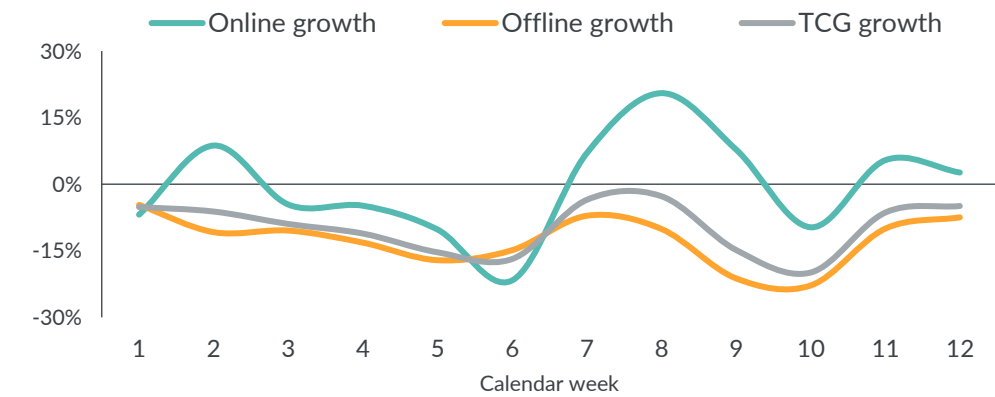
Brazil

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 12 (Mar 20 – Mar 26)



- Online sales experienced a plus of 3% versus week 12 in 2022, but this failed to compensate for the losses of traditional retail (-7%) and left the total TCG at a minus of 5%.
- The mixed picture for IT/Office categories ranged from -9% for mobile computing and inkjet printers to +8% for laser printers. Smartphones accelerated at +8%.
- While CE products lost in solid double digits (TVs posting -39%), MDA and SDA categories delivered growth, ranging from +18% for vacuum cleaners to +5% for dental care. Food preparation lagged at -5%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 12 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

France

Italy

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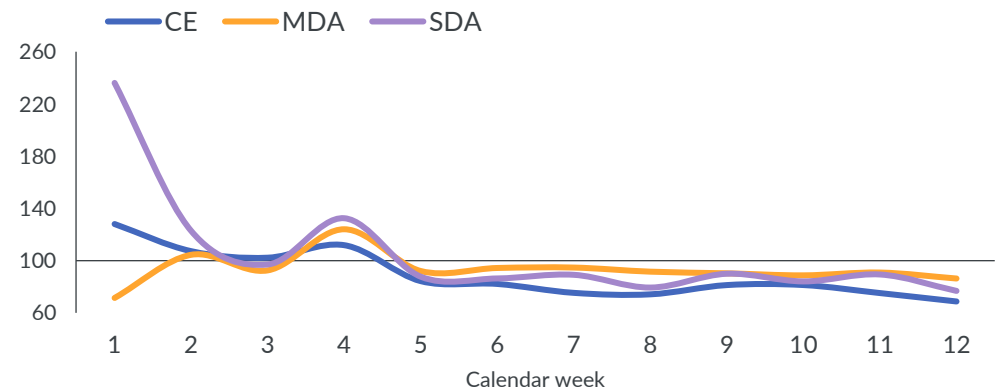
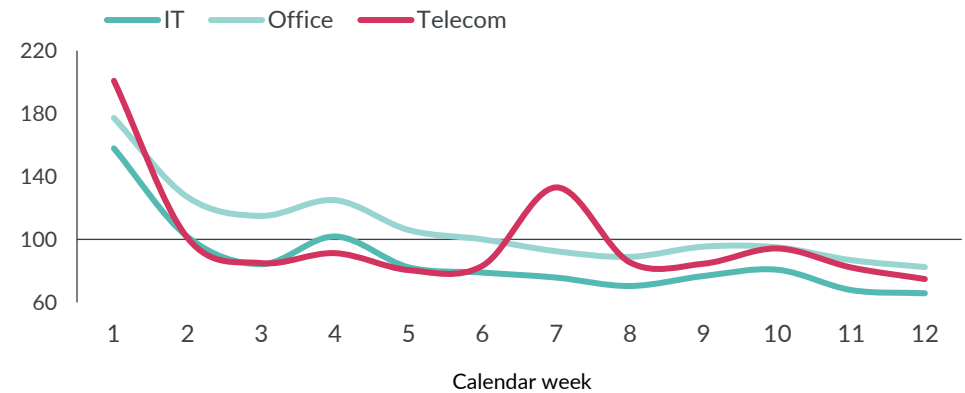
Russia

Japan

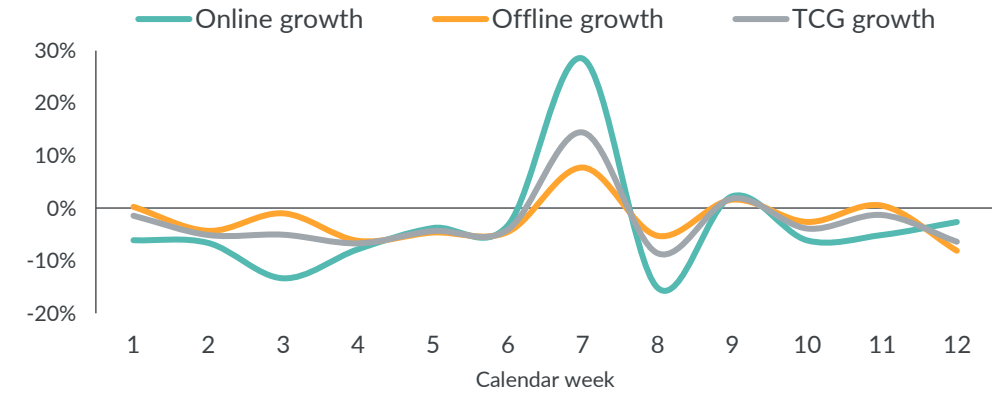
Brazil

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 12 (Mar 20 - Mar 26)



- Traditional retail experienced a minus of 8% vs week 12 in 2022, and online sales were down by -3%. Combined this caused a downswing for the total TCG market of 6%.
- Desktop computing and media tablets (-29%) were the worst-performing categories among IT/Office products, although all the others lagged as well. While smartphones were down 4%, headsets posted growth of 9%.
- Although CE products lost in solid double digits (audio home systems at -27%), MDA and SDA categories delivered growth (apart from washing), ranging from +28% for vacuum cleaners to +3% for hot beverage makers.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 - 12 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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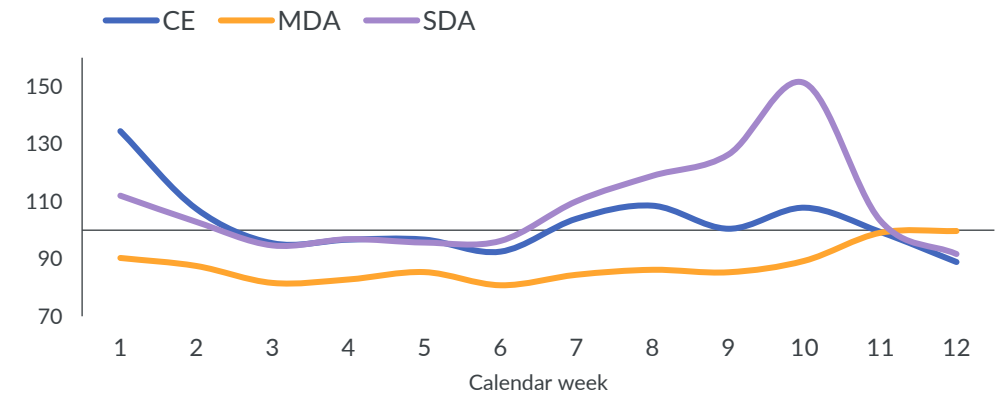
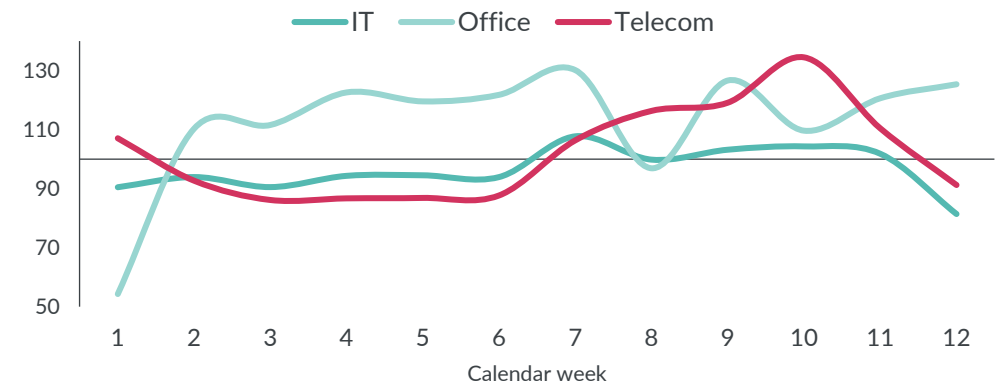
> **Russia**

Japan

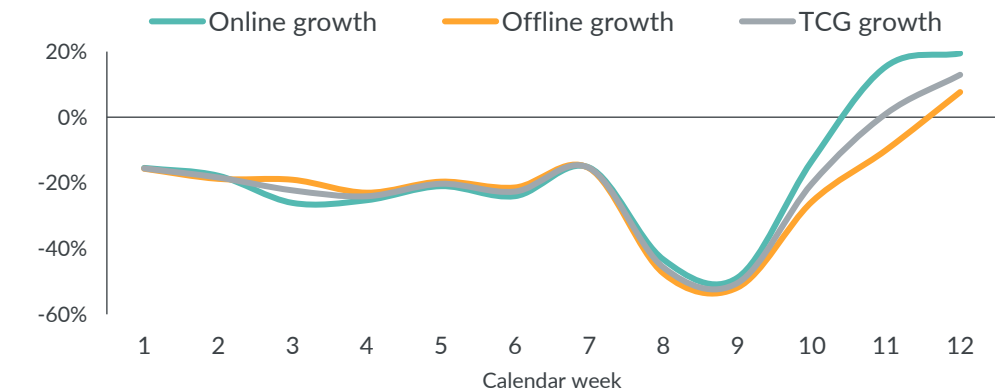
Brazil

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 12 (Mar 20 - Mar 26)



- Online sales experienced a plus of 19%. Added to +8% for traditional retail, the total TCG market finally registered a good growth of 13%.
- Media tablets, desk computing, and keyboards posted moderate, single-digit growth versus week 12 while other IT/Office categories posted high double-digit rates.
- MDA/SDA/CE mostly saw negative dynamics except for audio home systems which maintained triple-digit growth, vacuum cleaners posting +17%, and hot beverage makers at +7%. TVs were flat.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 12 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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France

Italy

Spain

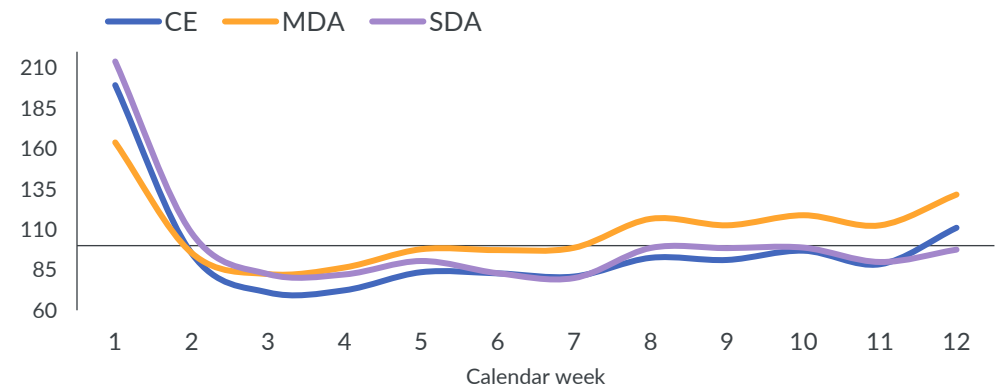
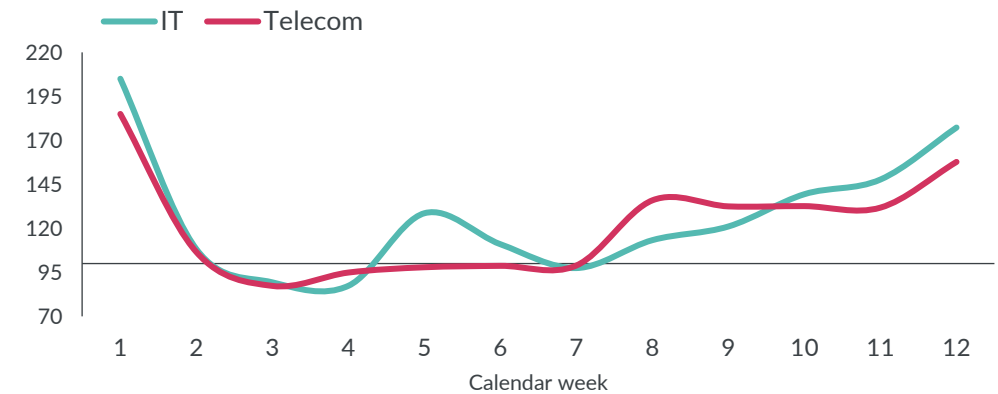
Russia

➤ Japan

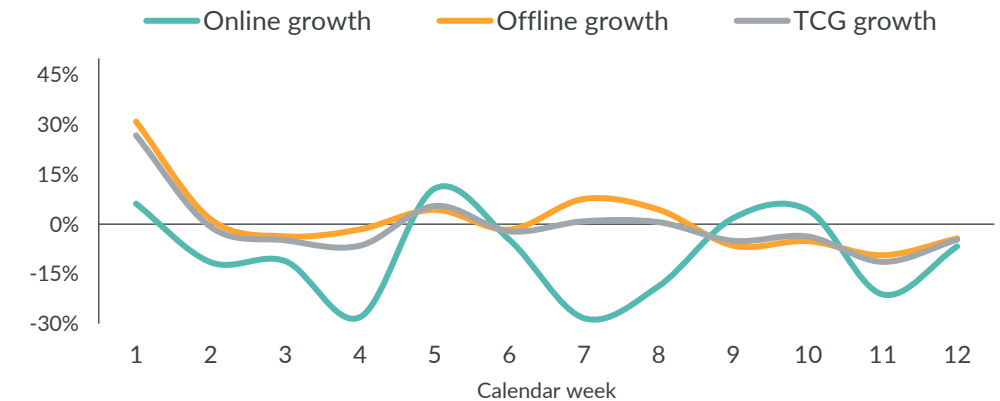
Brazil

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 12 (Mar 20 – Mar 26)



- Both distribution types dropped: online sales at -7% and traditional retail at -4%, delivering a decline for the total TCG market of -5%.
- Only media tablets were positive at +33%. Other IT/Telecom categories witnessed negative trends with smartphones at -8%, headsets at -7%, and mobile computing at -2%.
- CE products were in decline with the worst performance of audio home systems posting -27%. The mixed picture for MDA/SDA was led by hot beverage makers at +14%. Food preparation brought up the rear at -14%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 12 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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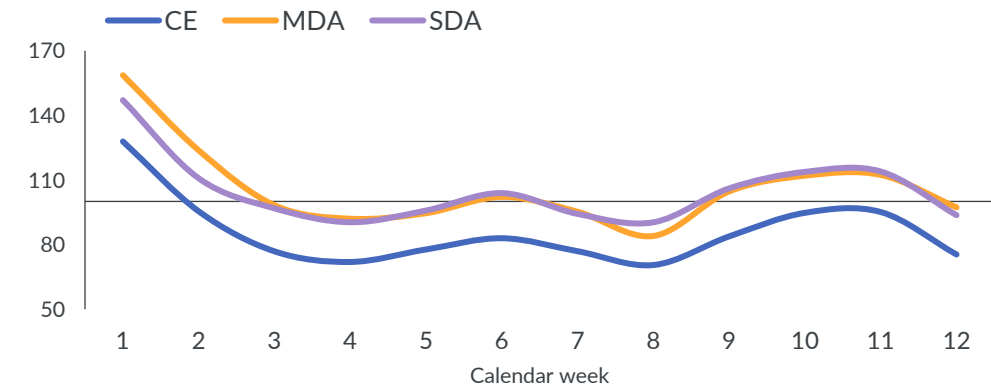
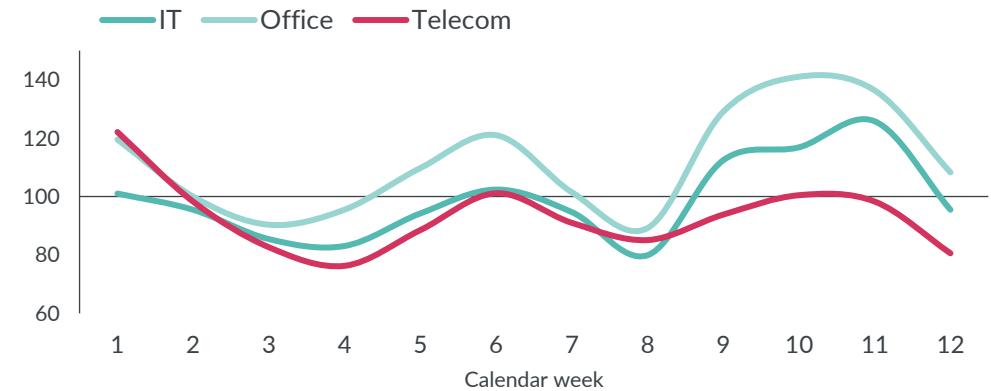
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Japan

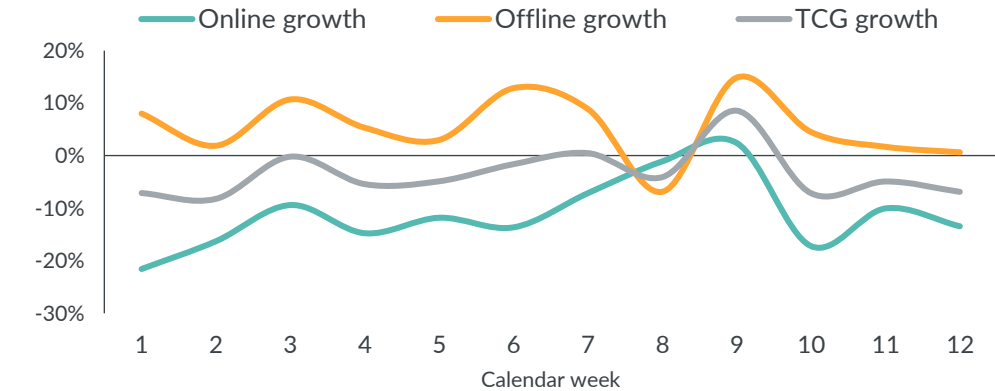
> Brazil

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 12 (Mar 20 – Mar 26)



- Traditional retail experienced a slight plus of 1% vs week 12 in 2022, but this failed to compensate for the losses of online sales (-13%) and left total TCG at a minus of 7%.
- The rates for IT/Office products ranged from -12% for mobile computing to +32% for media tablets. Smartphones slumped at -16%.
- The overall positive picture for MDA/SDA product groups delivered double-digit growth for vacuum cleaners (+27%), hot beverage makers (+21%), and shavers (+14%). TV and cooling sales were stable. Audio home systems posted negative trends at -14%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 12 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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Fact of the week

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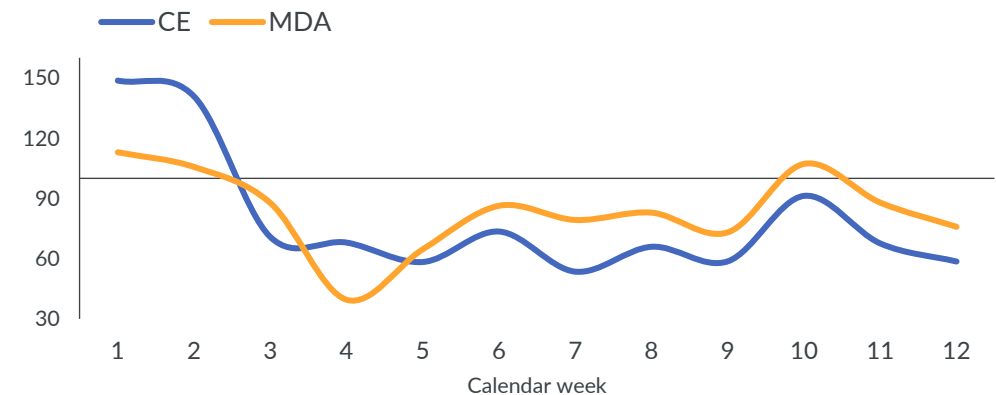
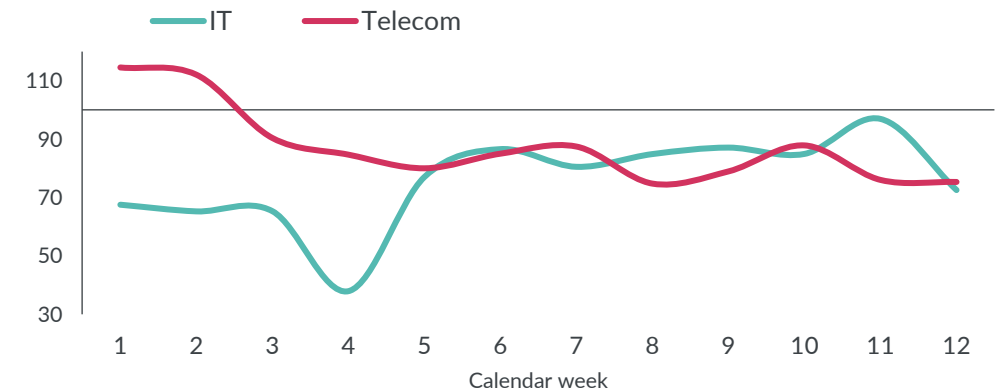
Japan

Brazil

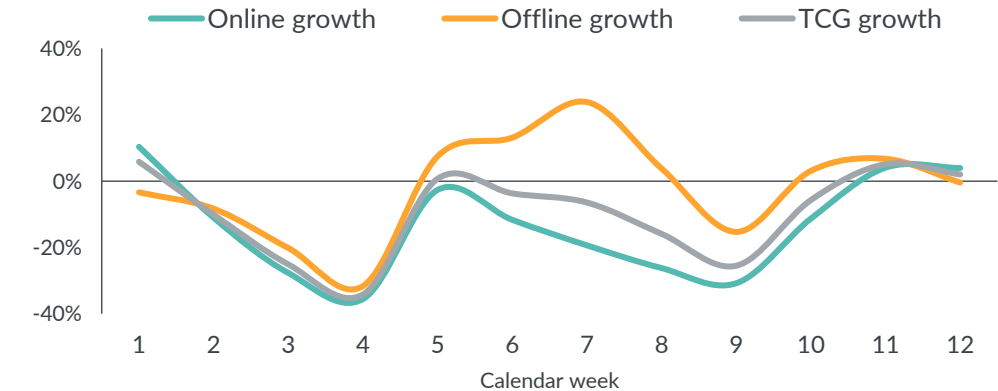


China

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 12 (Mar 20 - Mar 26)



- After +7% in week 11, traditional retail was flat in week 12. Online sales experienced an uptick of 4%, the same as the previous week. The total TCG market increased by 2%.
- Mobile PCs decelerated at 6%. Smartphones delivered a moderate plus of 8%.
- Week 12 in 2023 saw declines in TV sales (-15%), washing machines (-6%), and cooling at -3%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 12 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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Knowledge

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