



Growth  
from  
Knowledge

# State of consumer technology and durables sales tracker

Weekly trends and insights for  
the tech and durables market

Edition 152  
cw16/2023

Powered by **gfknewron**

# Take the effort out of analyzing data

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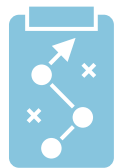
**gfknewron** gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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- Maximize engagement with deep customer insights, with **gfknewron Consumer**
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# Fact of the Week

European Consumer Climate continues to rise; third increase in a row



About **gfknewron**

> Fact of the week

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Great Britain

France

Italy

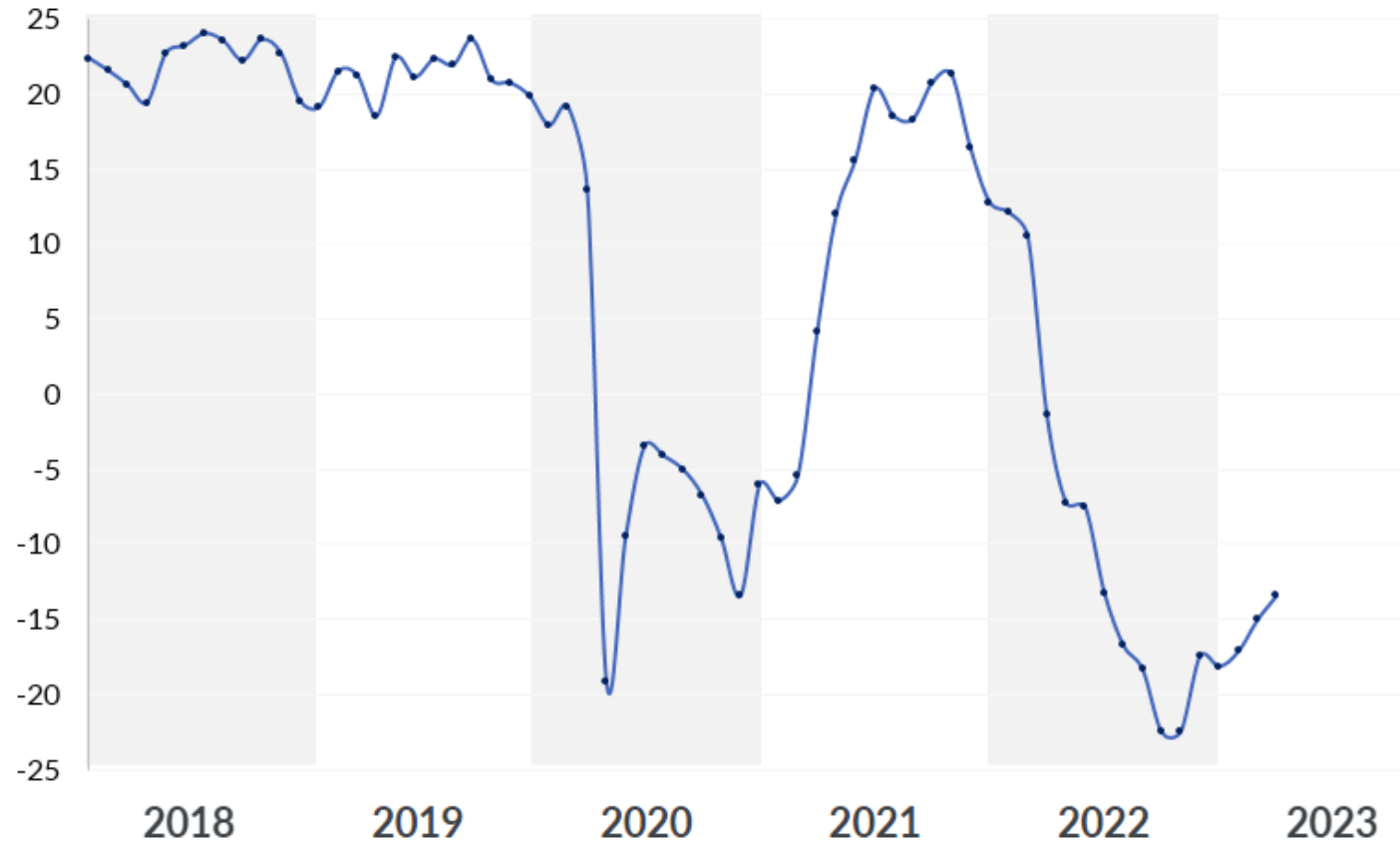
Spain

Russia

Japan

Brazil

China



**Economic expectations**  
Index: **-16** | +/- vs  
prev. month: +/-0%



**Income expectations**  
Index: **-26** | +/- vs  
prev. month: +1%



**Willingness to buy**  
Index: **-32** | +/- vs  
prev. month: +1%

# Weekly retail insights from the Point of Sale

## Spotlight on Germany



About **gfknewron**

Fact of the week

➤ Germany

Great Britain

France

Italy

Spain

Russia

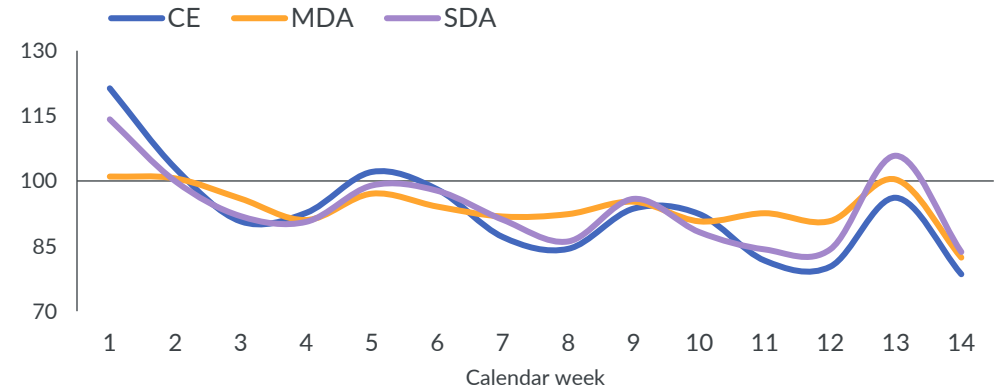
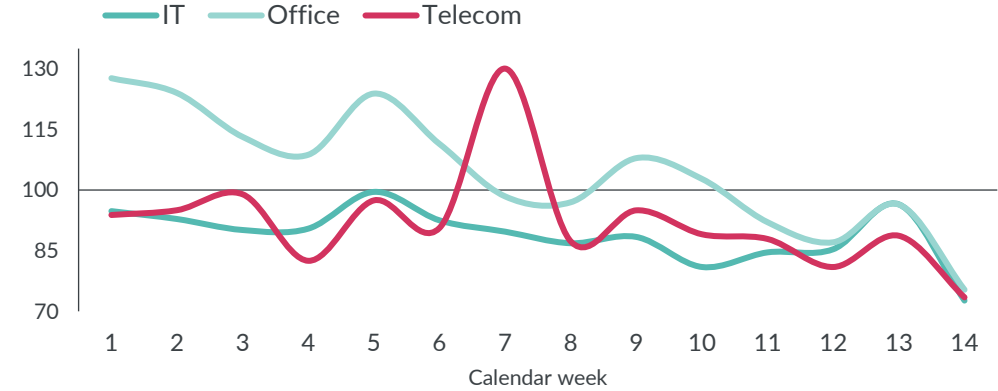
Japan

Brazil

China

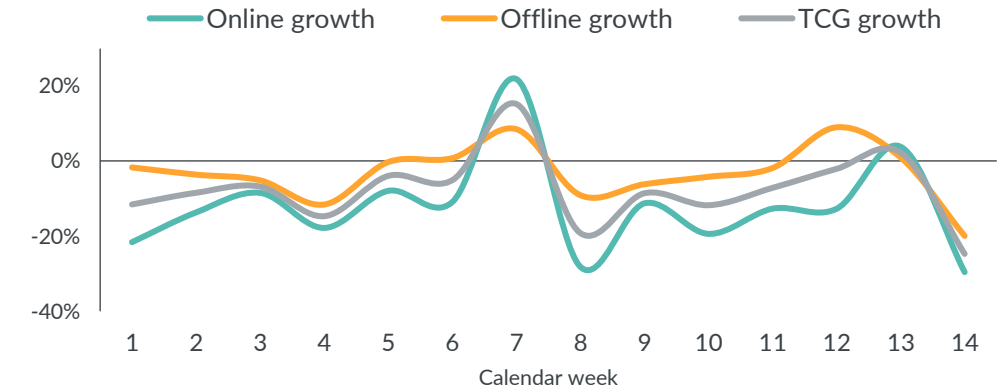
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 14 (Apr 03 – Apr 09)



- Compared to non-Easter week 14 in 2022, in week 14 of 2023 (including Good Friday) the total TCG market dropped by 25%, driven by online sales at -30%. Traditional retail lost 20%.
- All IT/Office and telecom categories suffered, with declines of more than 20%. Mobile computing was hit the most with a decrease of 34%, followed by media tablets at -30%.
- MDA/SDA/CE products were less negative, ranging from -34% for air treatment to -5% for dental care and -1% for audio home systems. TV sales decreased by 21%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 14 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



About **gfknewron**

Fact of the week

Germany

➤ Great Britain

France

Italy

Spain

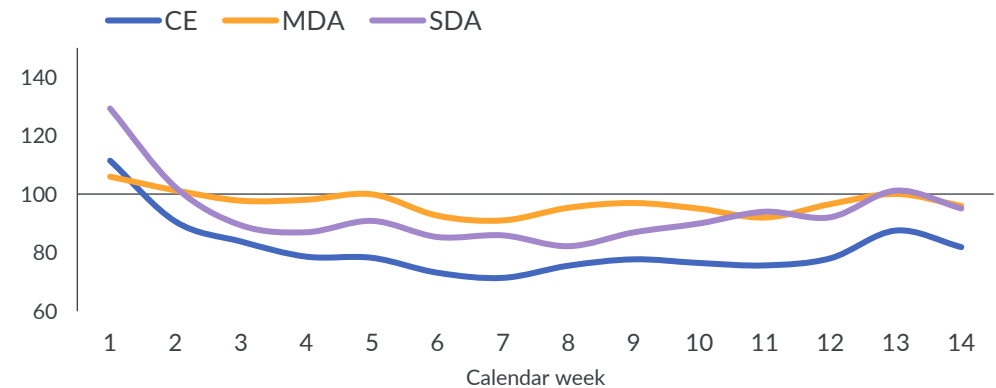
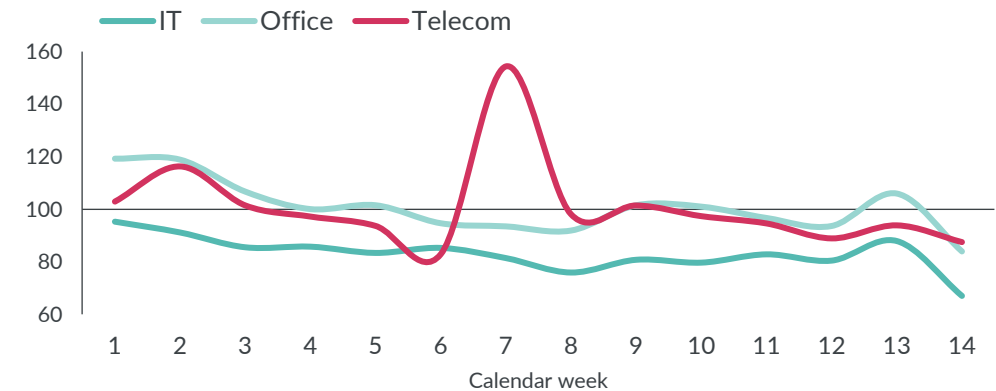
Russia

Japan

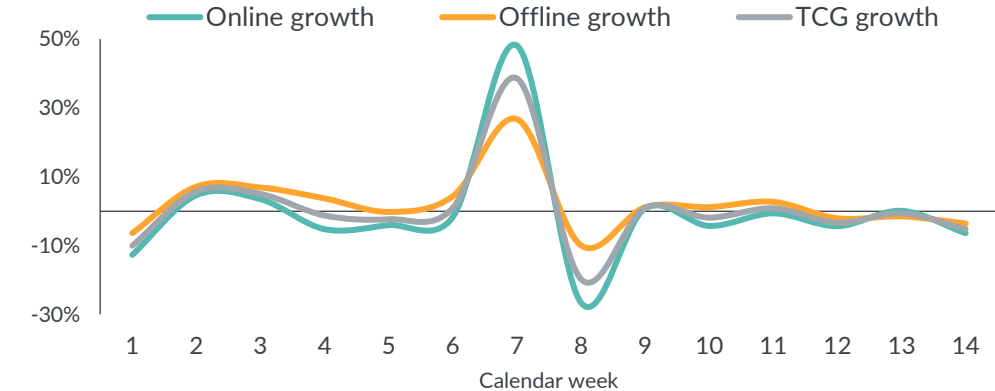
Brazil

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 14 (Apr 03 - Apr 09)



- Deceleration of online sales (-6%) dragged the total TCG market down by 5%. Traditional retail at -4% was not able to compensate for the losses.
- All IT/Office products lost in double digits, ranging from -45% for media tablets to -14% for mice. Smartphones and headsets both experienced an uptick of 2%.
- While audio home systems (-12%) and TVs (-9%) posted negative trends, soundbars accelerated at +7%. SDA categories were single-digit positive, except for dental care at -3%. Cooling was flat at -0.7%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 14 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

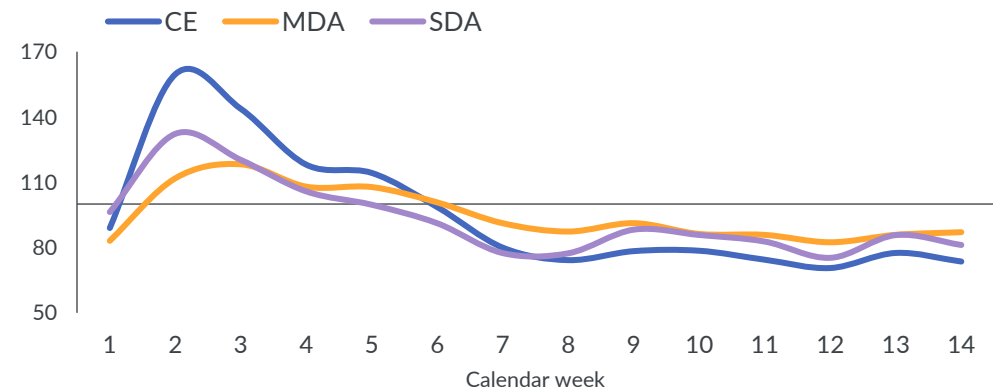
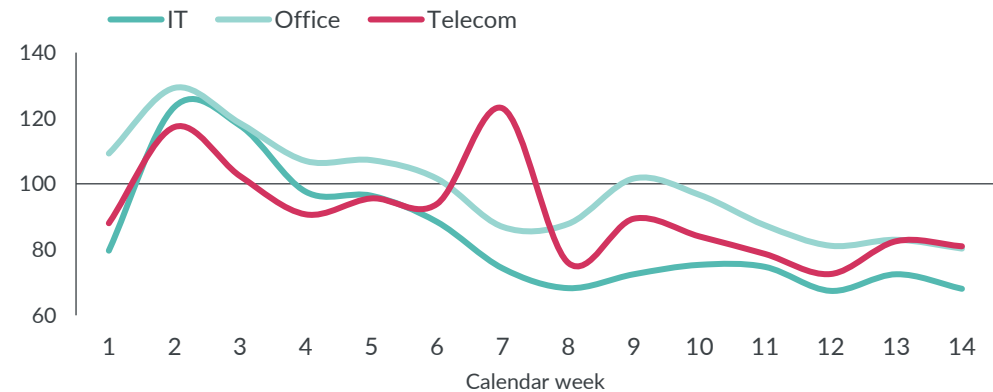
# Weekly retail insights from the Point of Sale

## Spotlight on France

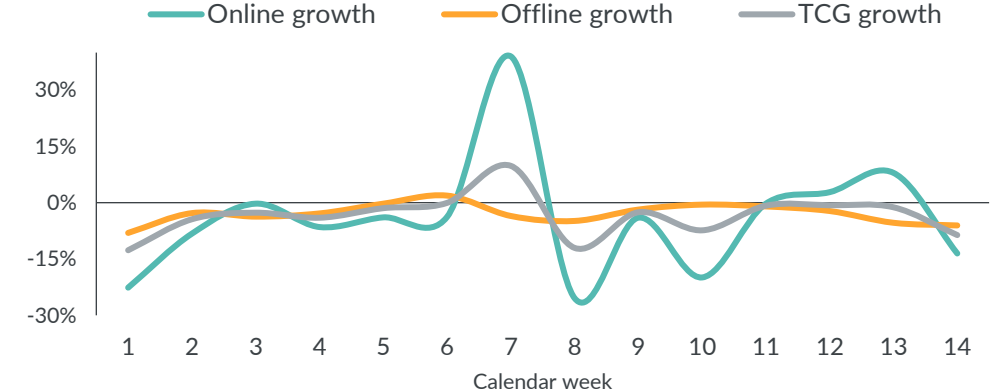


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- Japan
- Brazil
- China

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 14 (Apr 03 – Apr 09)



- Online sales delivered -14% (+8% the previous week) and traditional retail was down -6% (-5% the previous week), resulting in a downswing for the total TCG market of -9% (incl. dental care & shavers).
- IT/Office products posted solid negative trends, ranging from -12% for mice to -37% for desk computing. While smartphones lagged at -13%, headsets were up 7%.
- CE categories posted negative trends with TV sales at -8%. Within SDA, only air treatment accelerated, at +5%. Washing machines delivered +2. Cooling was flat at -0.5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 14 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



About **gfknewron**

Fact of the week

Germany

Great Britain

France



Italy

Spain

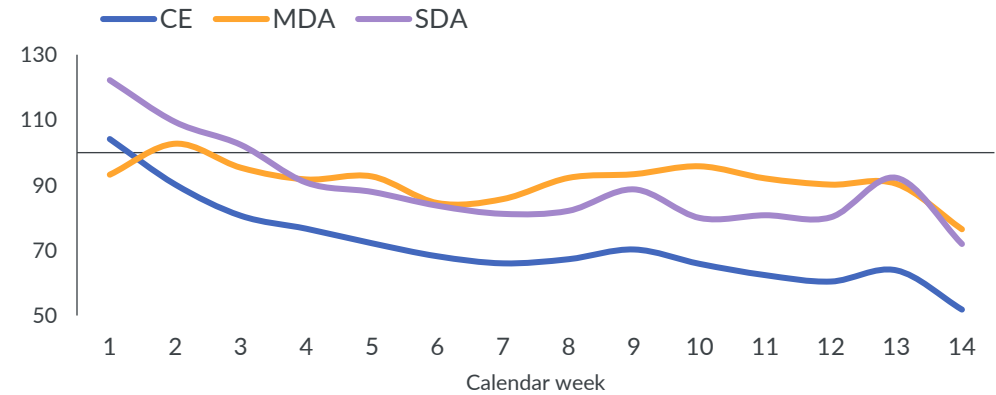
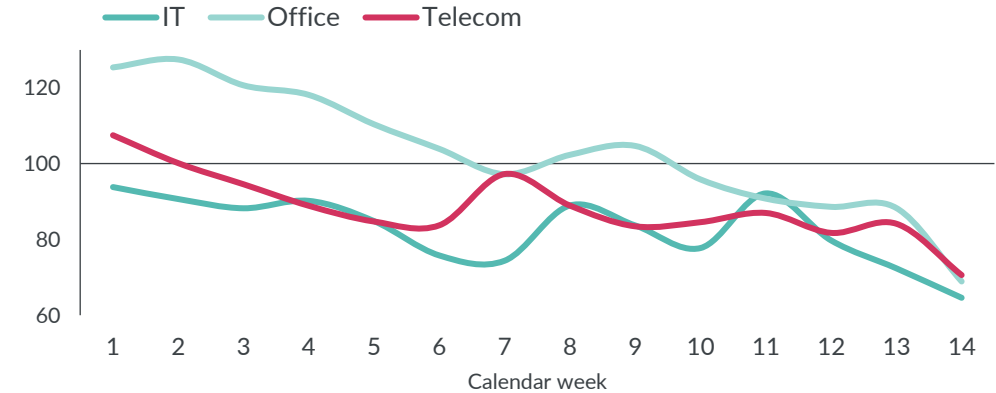
Russia

Japan

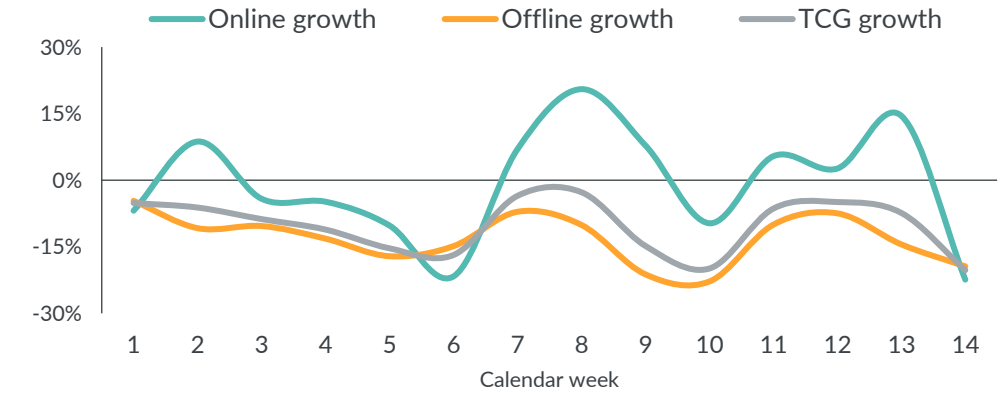
Brazil

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 14 (Apr 03 - Apr 09)



- The Easter week 14 in 2023 (including Good Friday) delivered strong drops for online sales (-22%) and traditional retail (-19%), resulting in a decline of 20% for the total TCG market.
- IT/Office products decreased in double digits, led by inkjet printers at -32%. Smartphones lagged at -2%.
- It wasn't just CE products that lost in solid double digits (TVs posting -49%), but most MDA and SDA categories as well. Cooling and food preparation were less negative at -8% and -7% respectively.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 14 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

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**> Spain**

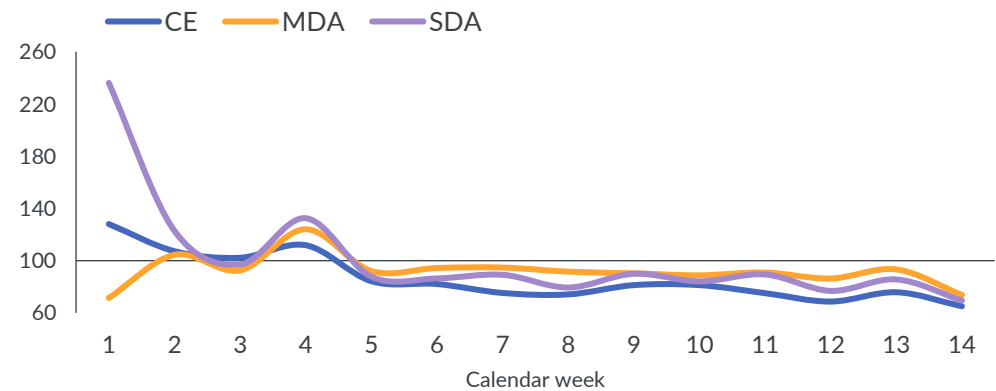
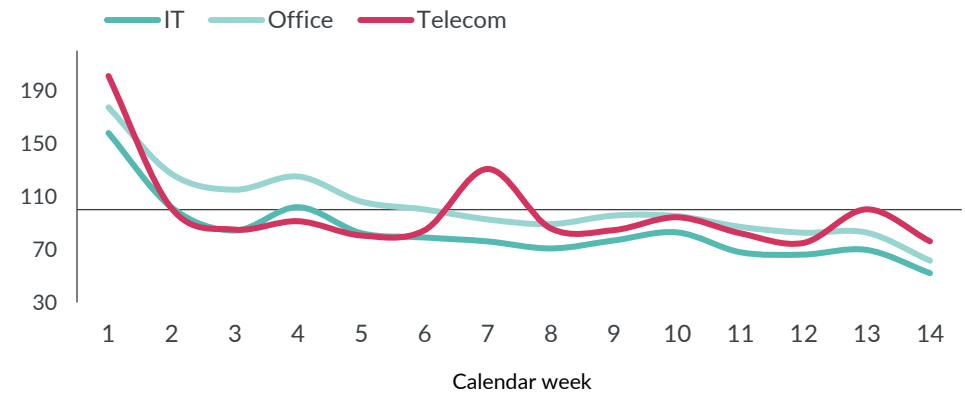
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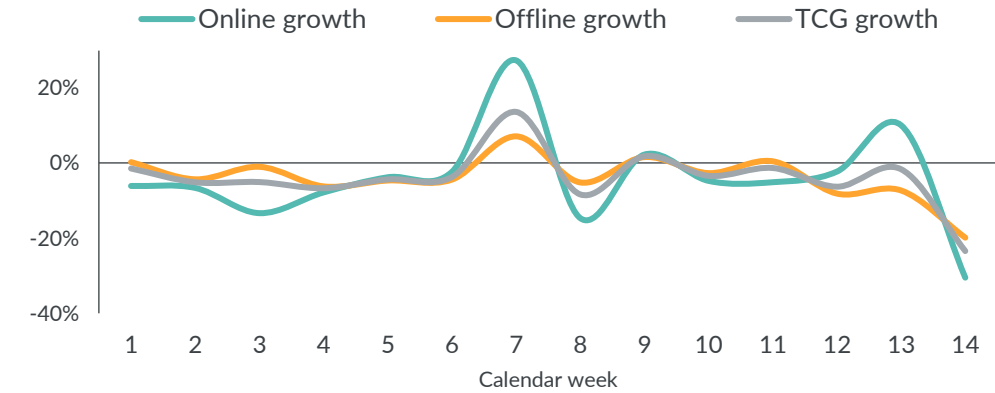
Brazil

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 14 (Apr 03 - Apr 09)



- In Easter week 14, online sales in Spain experienced a minus of 31% versus week 14 in 2022. As traditional retail was also down (by -20%), the total TCG market experienced a downswing of 23%.
- Desktop computing (-51%) was the worst-performing product group among IT/Office products which lost more than 30% across the category. Smartphones and headsets lagged at -15%.
- MDA/SDA/CE products experienced negative trends with shavers and hot beverage makers impacted the least at -8%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 14 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



About **gfknewron**

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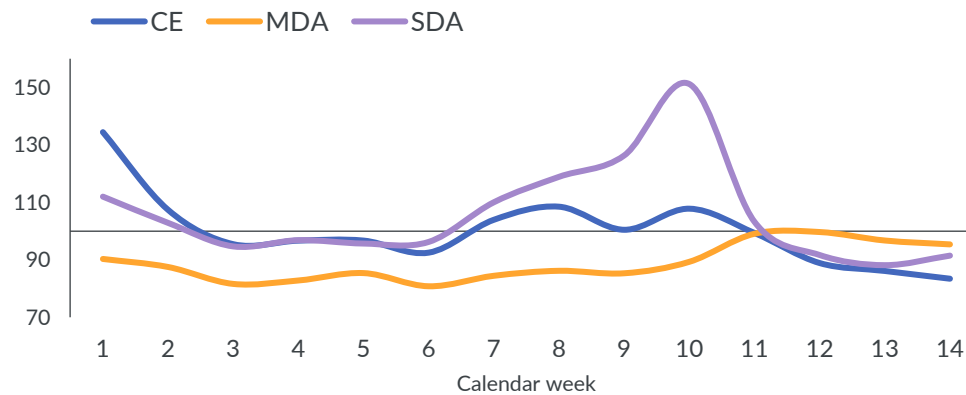
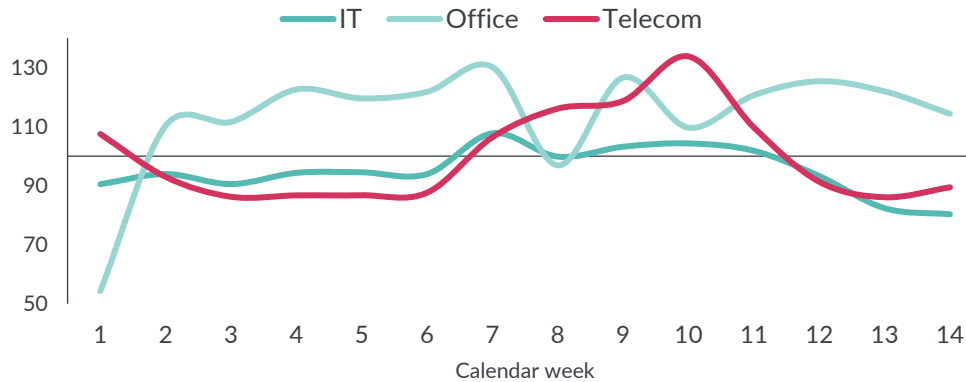
➤ Russia

Japan

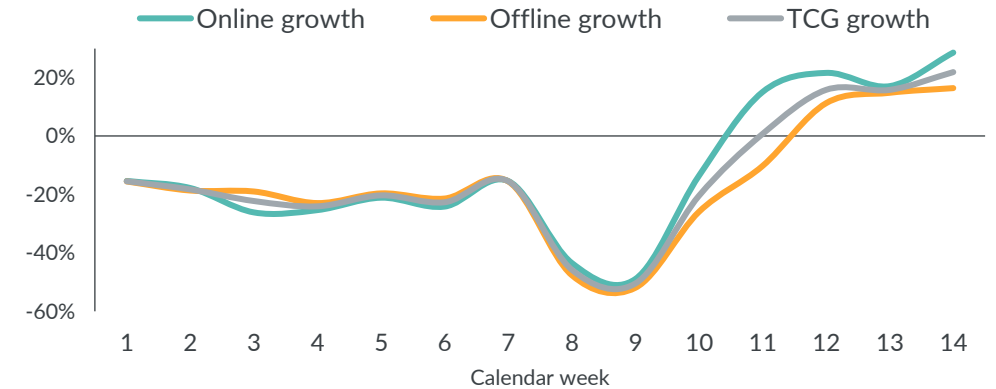
Brazil

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 14 (Apr 03 - Apr 09)



- Online sales experienced a plus of 29%. Added to +16% for traditional retail, the total TCG market finally registered a good growth of 22%.
- Apart from desk computing at -7%, all other IT/Office categories posted high double-digit rates, with laser printers in the lead at +63%. Smartphones were up 31%. Headsets were weak at +5%.
- SDA and CE products presented an overall positive picture with audio home systems maintaining triple-digit growth and soundbars (-14%), dental care (-9%), and shavers (-2%) bringing up the rear. Cooling and washing machines both accelerated at +32%.

# Weekly retail insights from the Point of Sale

## Spotlight on Japan



About **gfknewron**

Fact of the week

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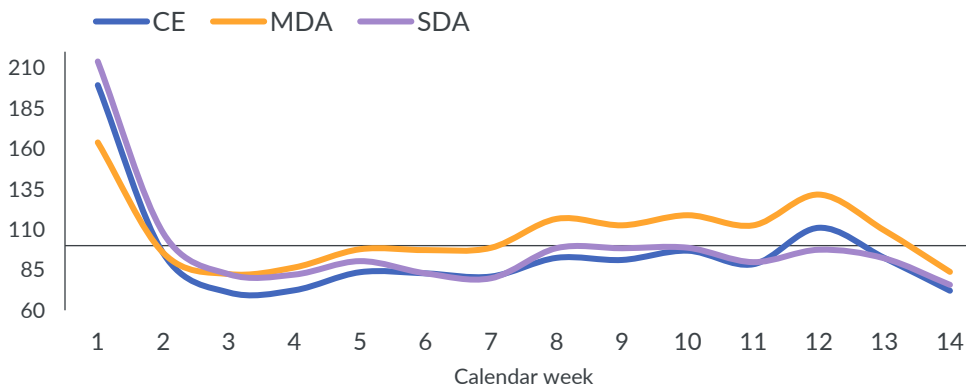
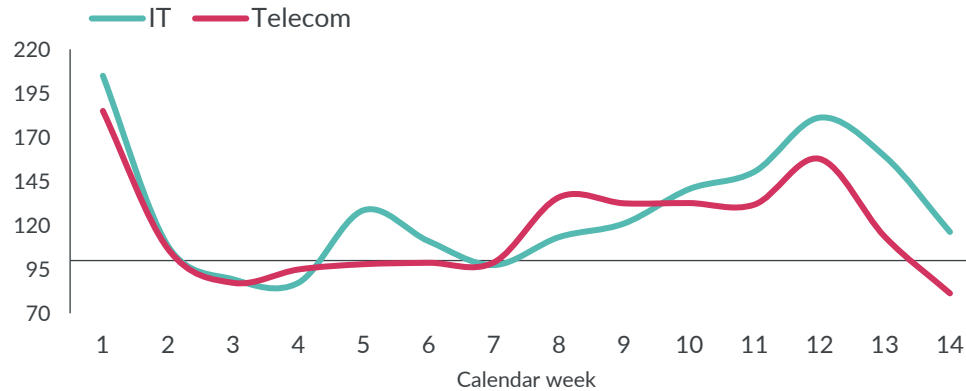
Russia

➤ Japan

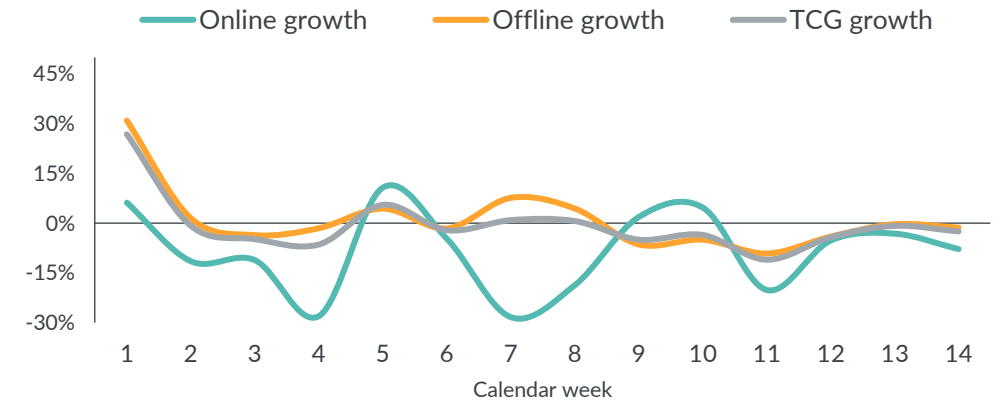
Brazil

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 14 (Apr 03 - Apr 09)



- Online sales dropped from -3% in week 13 to -8% in week 14. Combined with weak traditional retail at -1%, this caused a downswing for the total TCG market of 2% in week 14.
- The driver of this development was media tablets at -23%. Mobile computing was flat. Smartphones delivered +4%.
- While CE products witnessed negative trends with TVs posting -13%, SDA categories posted a mixed picture, led by dental care at +17% and air treatment bringing up the rear at -11%. Cooling was weak at -1%. Washing machines were flat.

# Weekly retail insights from the Point of Sale

## Spotlight on Brazil



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Fact of the week

Germany

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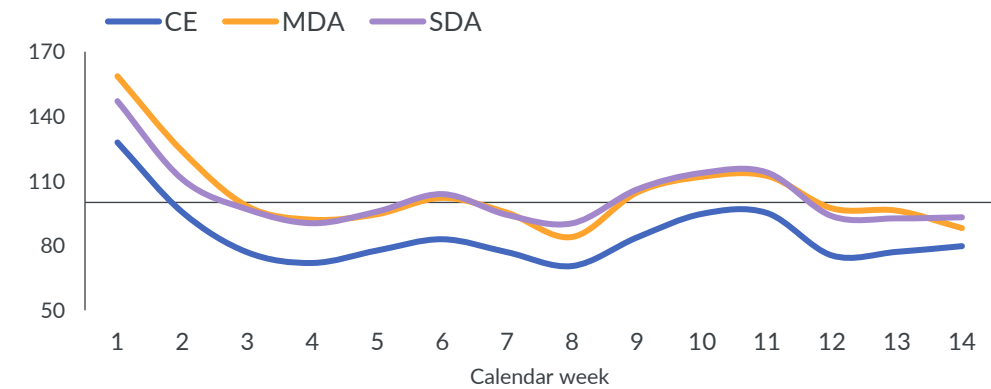
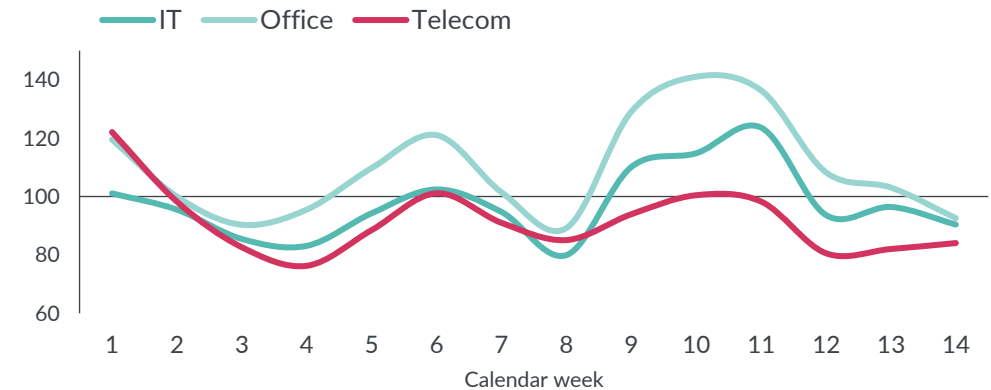
Russia

Japan

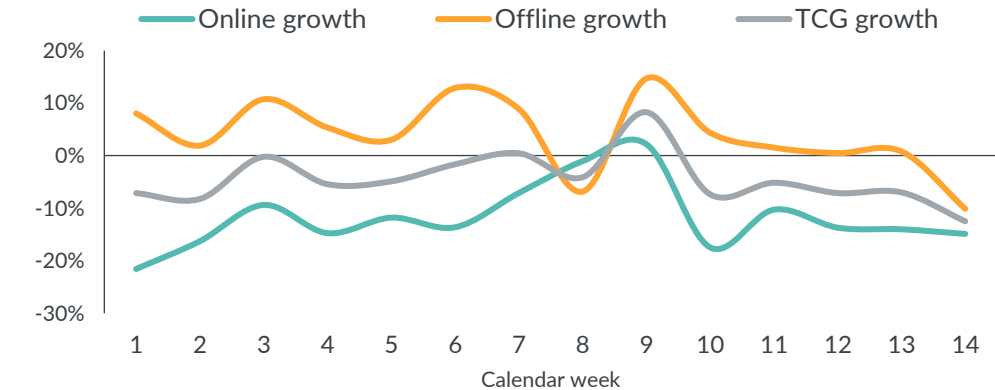
> Brazil

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 14 (Apr 03 - Apr 09)



- Traditional retail experienced a minus of 10% vs week 14 in 2022 and online sales were down by 15%, delivering a decline of 12% for the total TCG market.
- The rates for IT/Office products ranged from -25% for inkjet printers to +23% for media tablets. Smartphones lagged at -12%.
- The overall negative picture for MDA and CE product groups delivered double-digit declines for washing machines (-18%), cooling (-16%), and audio home systems (-16%). Apart from food preparation at -4%, SDA categories were single-digit positive.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 14 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



About **gfknewron**

Fact of the week

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Great Britain

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Italy

Spain

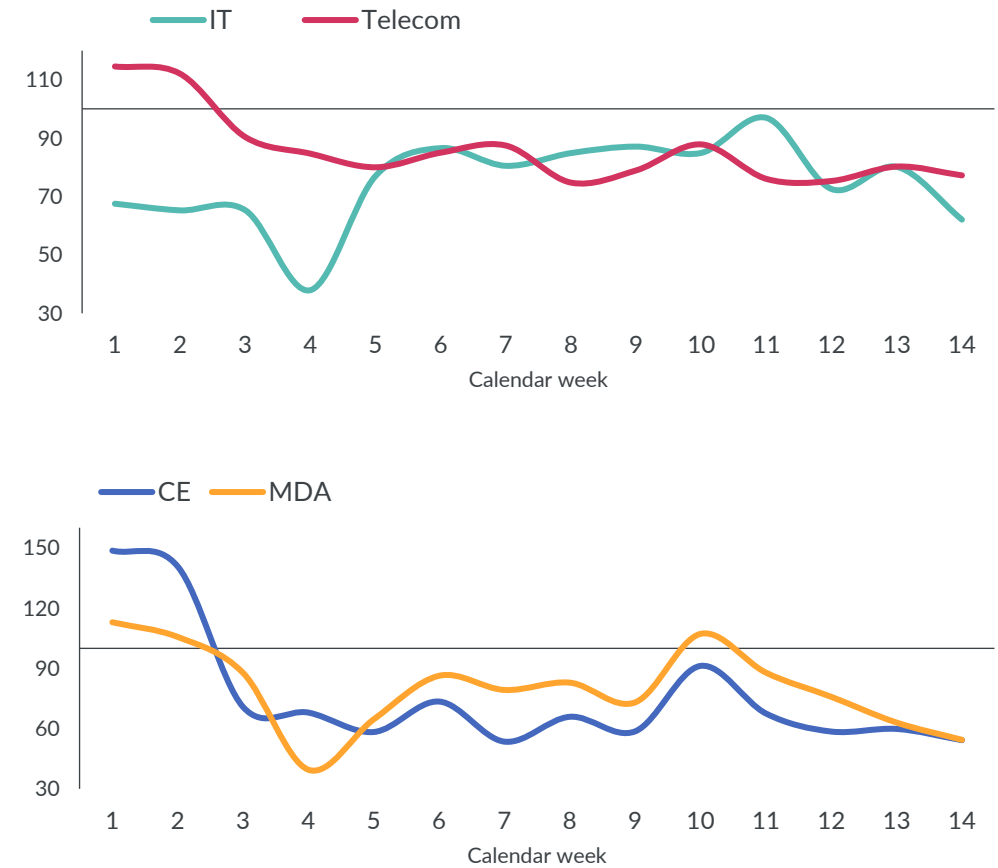
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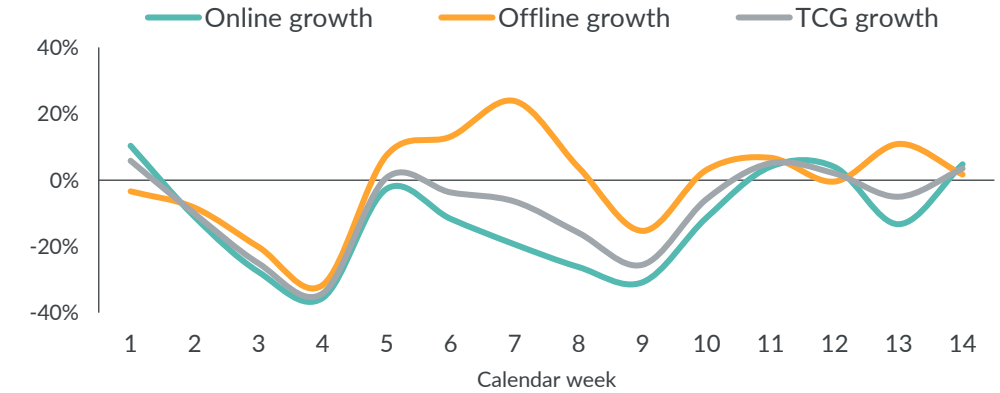
Brazil

> 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 14 (Apr 03 - Apr 09)



- The recovery of online sales at +5% (up from -13% in week 13) delivered an uptick for total TCG of 3%. Online sales dropped from +11% in week 13 to +2% in week 14.
- Mobile PCs accelerated at 6%. Smartphones delivered a plus of 4%.
- Week 14 in 2023 saw small increases for TV sales (+2%) and cooling (+2%). Washing machines experienced a slight decline of 2%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 14 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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