



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 153

cw17/2023

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> About **gfknewron**

Fact of the week

Germany

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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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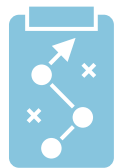
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Fact of the Week

With the importance of streaming services, the Smart TV is the No. 1 trigger.



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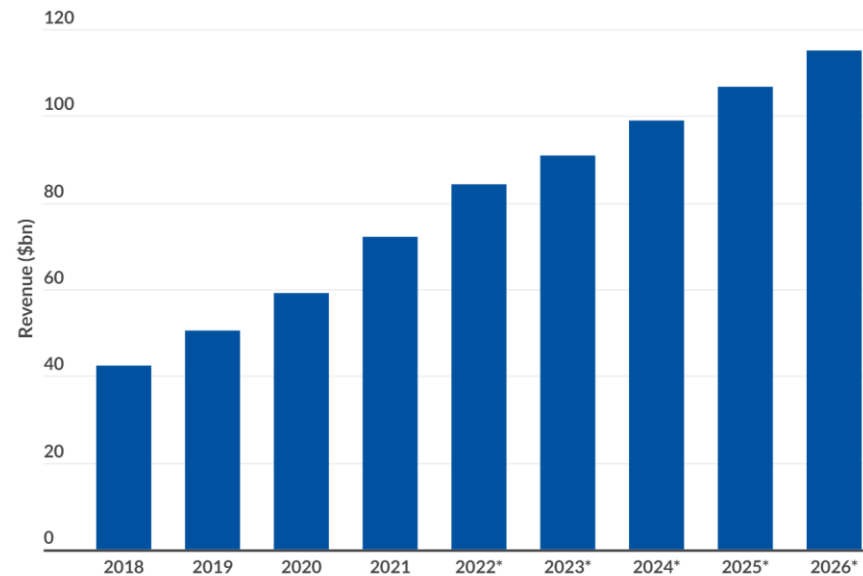
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Global Revenue of Video Streaming Portals



Sources: Grand View Research, pwc, Statista

Share



Ranking of most important product features 2022

Smart TV Online Access

Display Quality

Display Type

Sound Quality

Weekly retail insights from the Point of Sale

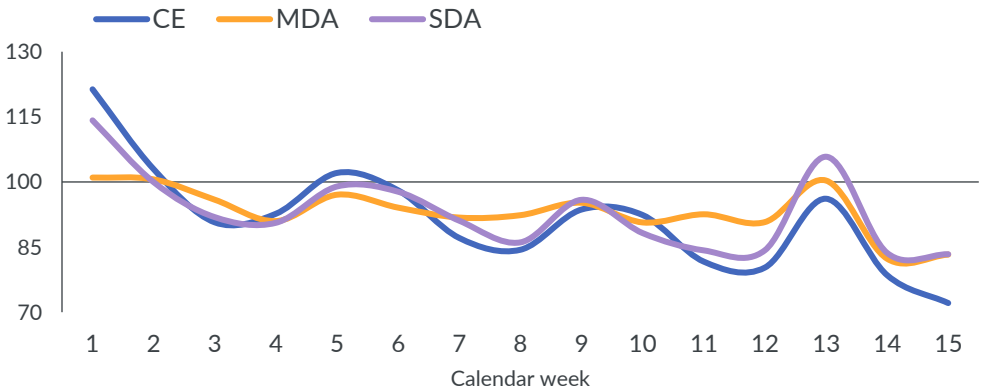
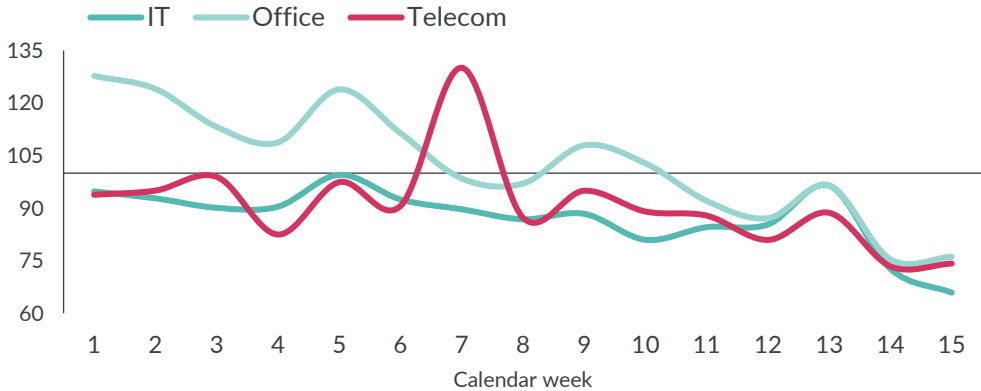
Spotlight on Germany



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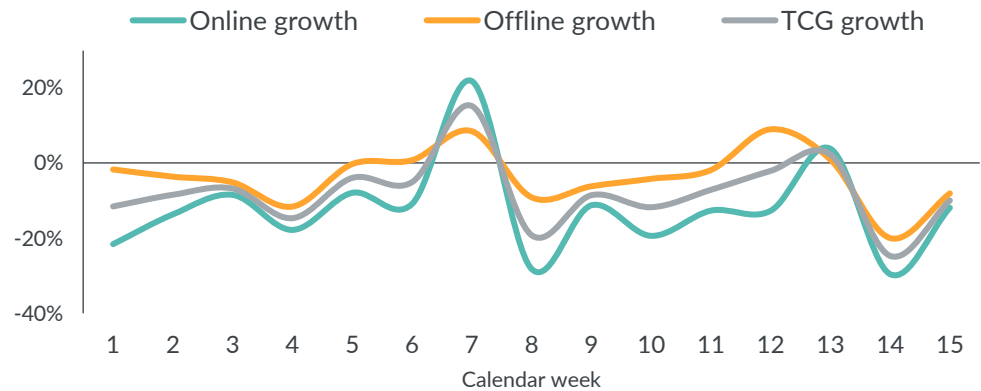
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 15 (Apr 10 - Apr 16)



- In post-Easter week, the total TCG market recovered from strong negative results but still dropped by 10%, driven by online sales at -12%. Traditional retail was down -8%.
- Except for printers (inkjet +7% and laser +23%), IT/Office products declined, ranging from -5% for monitors to -29% for media tablets. Smartphones decelerated as well at -10%.
- While TVs and audio home systems declined by 10% and 2% respectively, soundbars were positive at +2%. The mixed picture for MDA and SDA saw vacuum cleaners in the lead at +6% and food preparation weakest at -16%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 15 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.

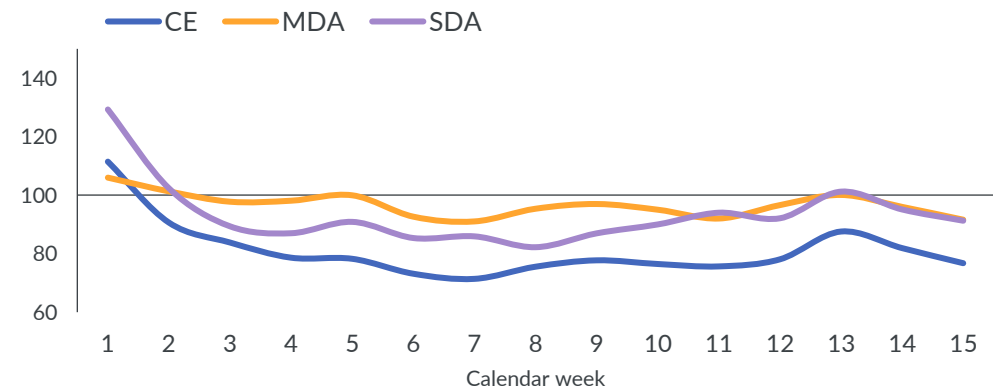
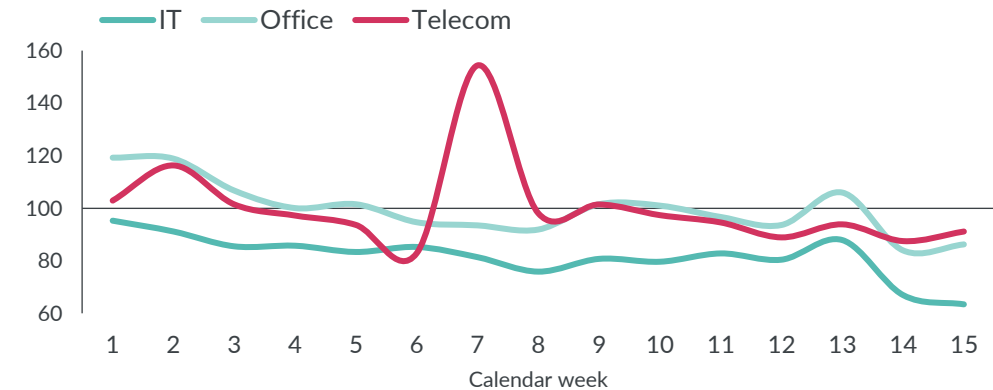
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

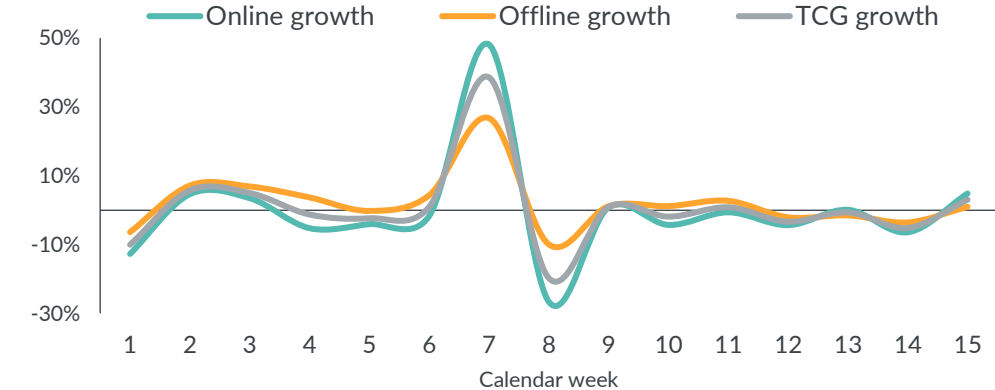


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 15 (Apr 10 - Apr 16)



- The recovery of both online sales +5% (up from -6% in week 14) and traditional retail +1% (up from -4%) led to a plus of 3% for the total TCG market.
- Except for printers (inkjet +5% and laser +12%), IT/Office products declined, ranging from -2% for desk computing to -40% for media tablets. Smartphones accelerated at +23%.
- MDA and SDA posted single-digit ups and downs with dental care at +6% and cooling at -5%. While TVs and audio home systems declined by 12%, soundbars were positive at +12%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 15 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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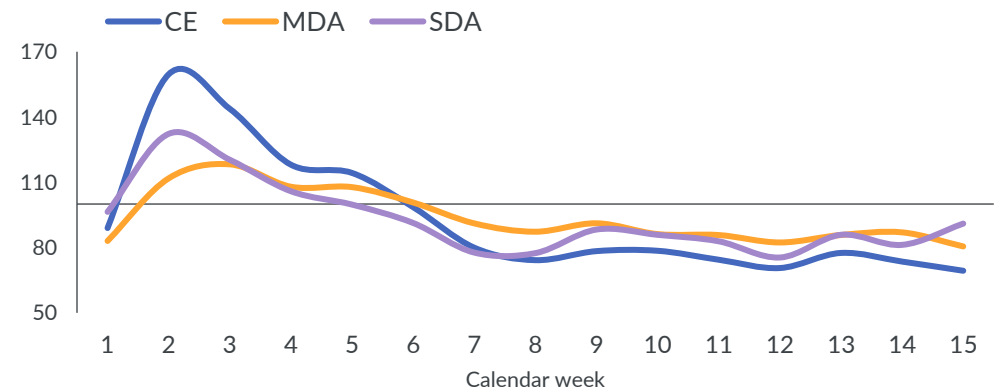
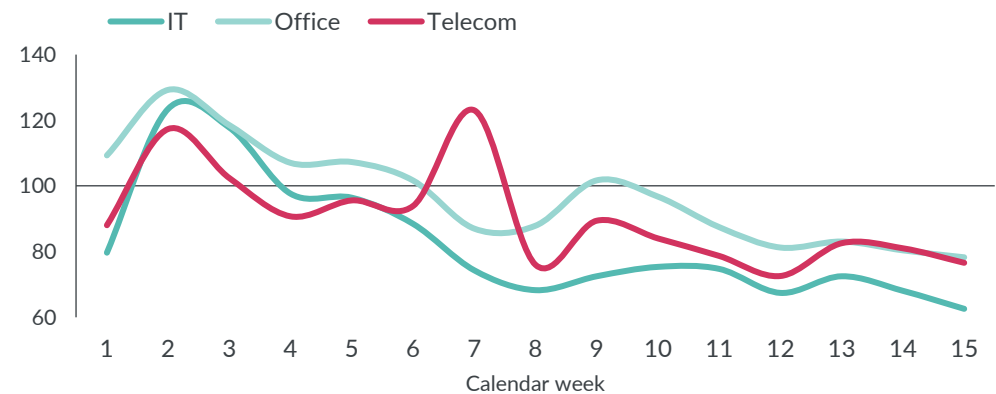
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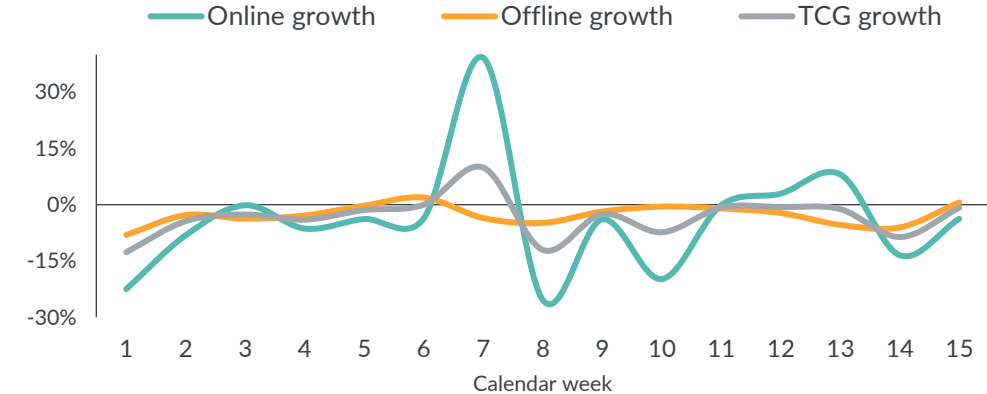
Brazil

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 15 (Apr 10 - Apr 16)



- Online sales delivered -4% (-13% the previous week). Traditional retail at +1% (-6% the previous week) was not able to compensate, resulting in a slight downswing of the total TCG market of 1%.
- IT/Office products posted negative trends, ranging from -31% for desk computing to -3% for keyboards. Inkjet printers and mice delivered +6%. While smartphones lagged at -2%, headsets were up 4%.
- A promo in hypermarkets for refills boosted dental care sales. The other SDA products showed a mixture picture with air treatment in the lead at +34% and food preparation bringing up the rear at -15%. TV sales lagged at -2%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 15 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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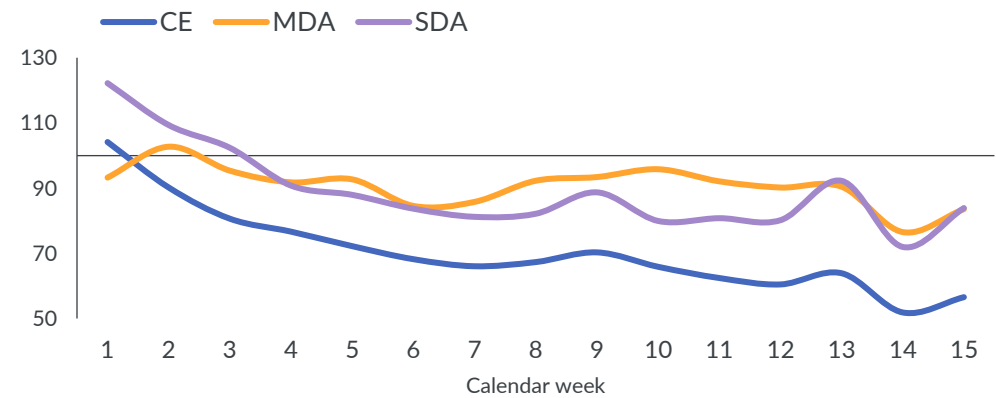
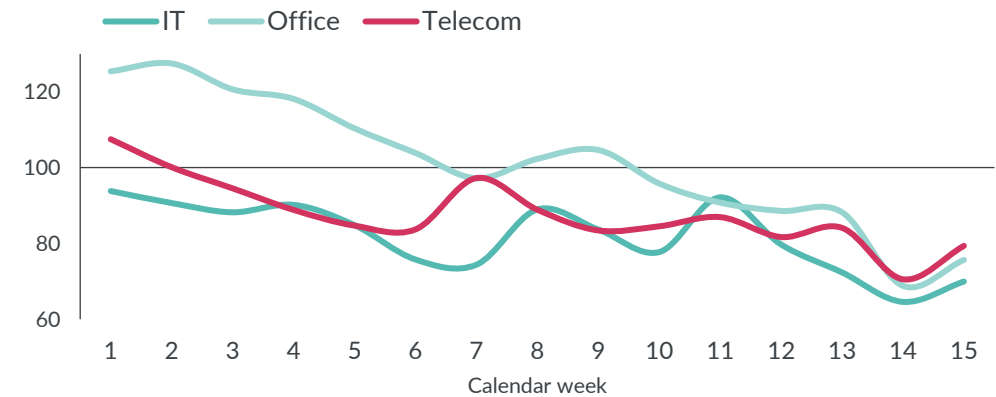
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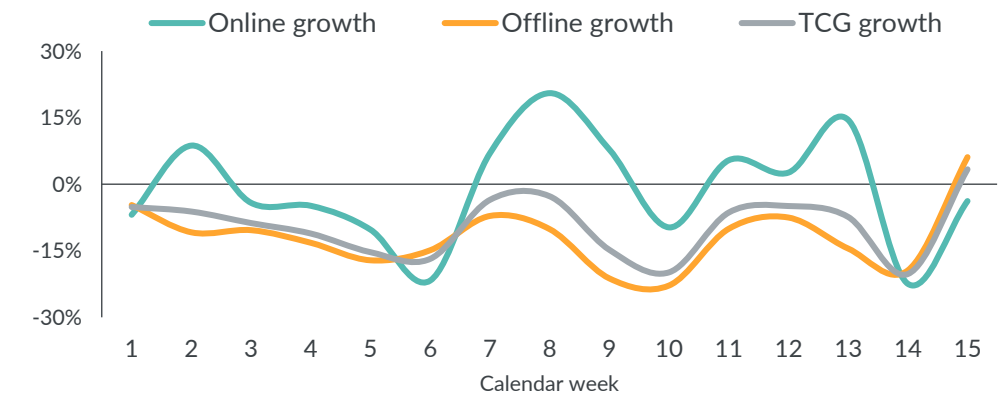
Brazil

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 15 (Apr 10 - Apr 16)



- The total TCG market recovered and was up 3%, driven by traditional retail posting +6% in week 15 2023. Online sales declined by 4%.
- Printers experienced an increase of 6%. Except for desk computing at +8%, the other IT products decreased. Smartphones accelerated at +15%.
- TVs again lost in solid double digits (-27%) but the other CE categories were less negative (audio home systems -10%) or even positive (soundbars +5%). The overall positive picture for MDA and SDA products was clouded by food preparation (-2%) and air treatment (-8%).

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 15 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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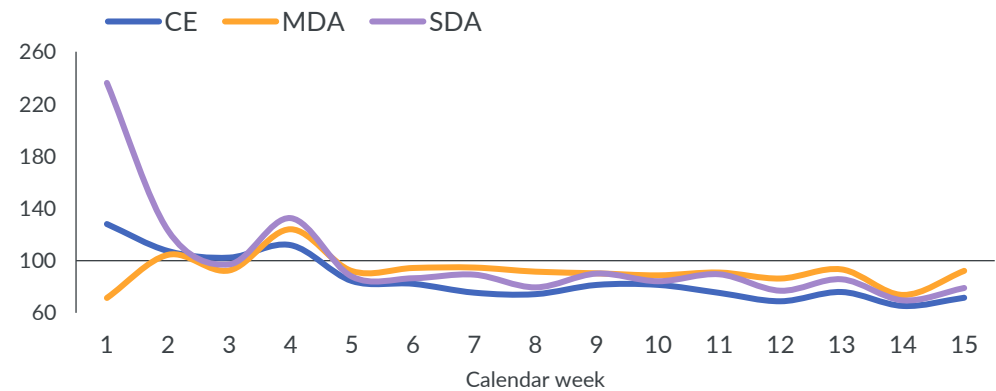
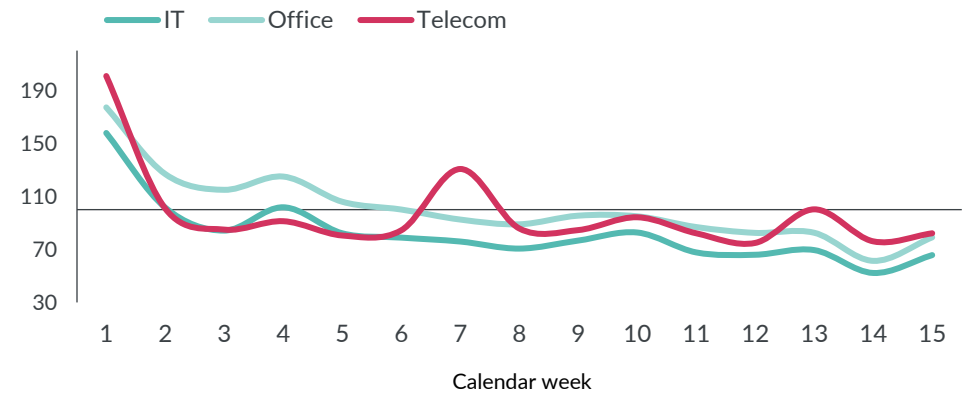
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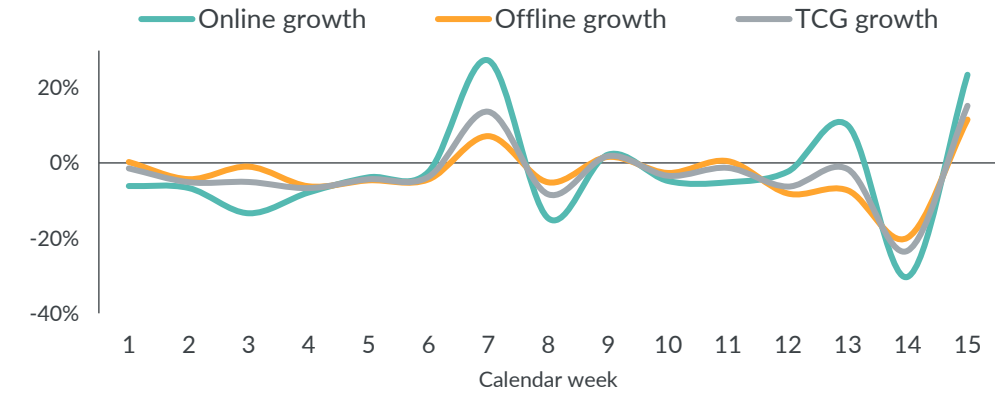
Brazil

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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 15 (Apr 10 - Apr 16)



- Both distribution types experienced a strong recovery in the post-Easter week. Traditional retail was up 12% (-20% the previous week) and online sales enjoyed +24% (-30% the previous week), resulting in an upswing of the total TCG market of 15%.
- Printers posted double-digit growth. Within IT products, media tablets were the only category with a negative trend (-10%). Smartphones were up 19%.
- All MDA and SDA products experienced solid double-digit uplifts. Within CE categories, audio home systems were weak at -13%. Smartphones were flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 15 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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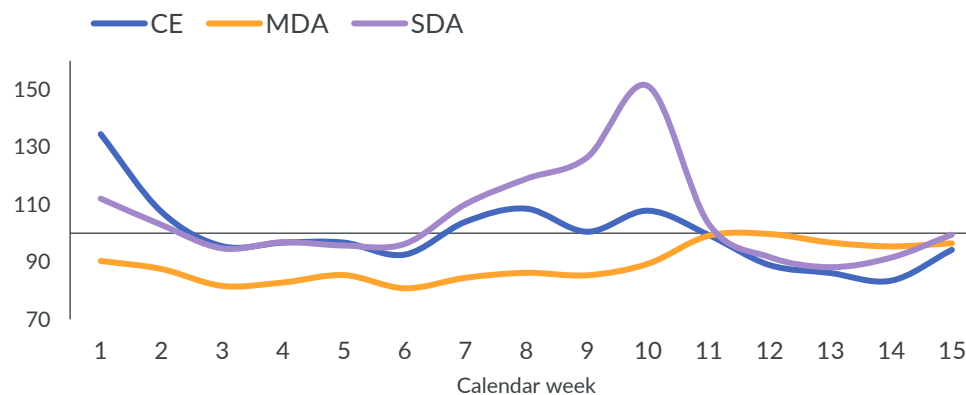
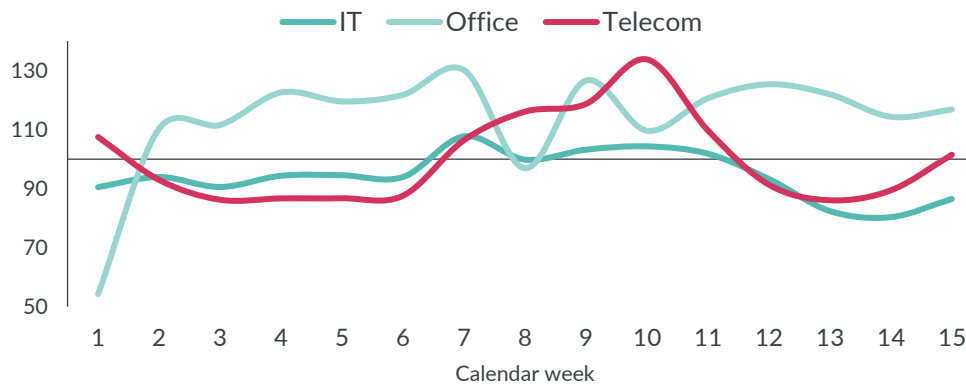
> Russia

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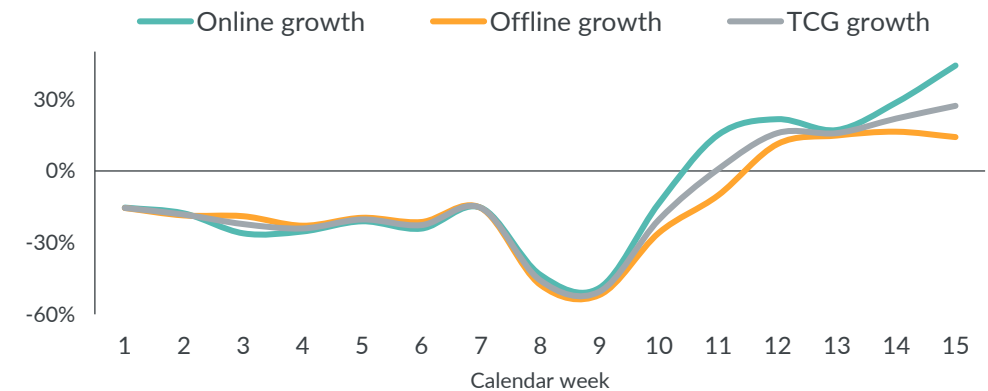
Brazil

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 15 (Apr 10 - Apr 16)



- The extraordinary growth of online sales (+44%) led to an uplift of 27% for the total TCG market. Traditional retail at +14% added to it.
- All IT/Office products delivered strong results with laser printers in the lead at +71%. Only desk computing was negative at -9%. Smartphones accelerated at +42%.
- The overall positive picture for MDA, SDA, and CE products was led by audio home systems at +88%. All other categories posted growth of more than 20%. The exceptions were soundbars (-14%), shavers (-9%), and dental care (-6%).

Weekly retail insights from the Point of Sale

Spotlight on Japan



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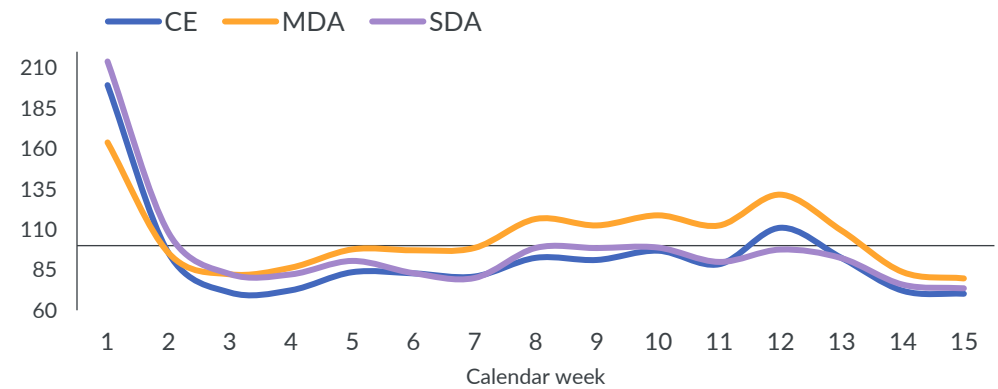
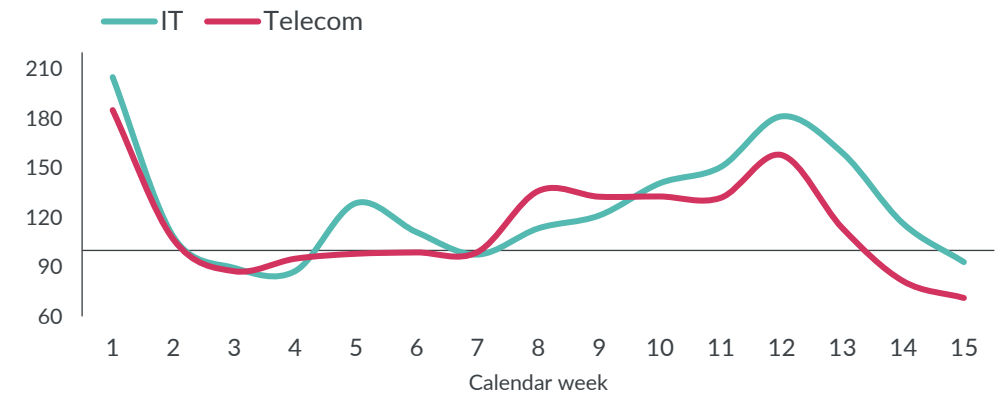
Russia

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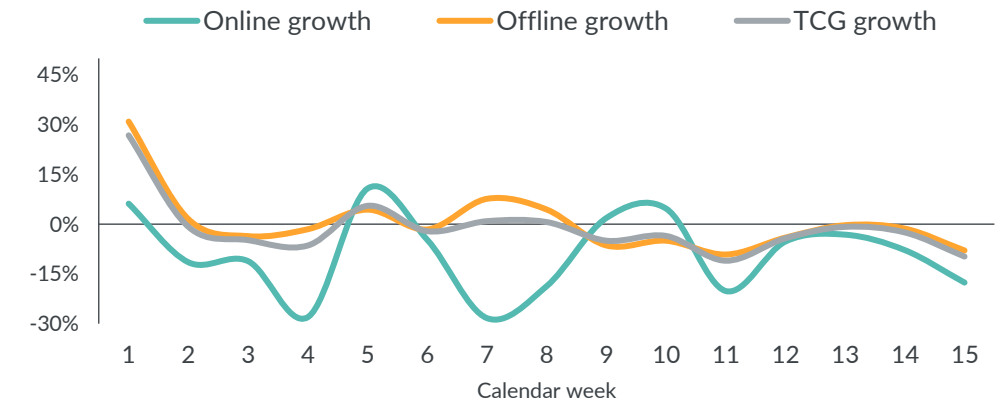
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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 15 (Apr 10 - Apr 16)



- As in past weeks, online sales dropped - at -18% in week 15. As traditional retail decreased as well (-8%), the total TCG market fell by 10%.
- The driver of this development was media tablets at -30%. Mobile computing posted -4%. Smartphones delivered -13%. Headsets were up 3%.
- Washing machines and cooling were negative at -4% and -18%, vacuum cleaners at -5% and air treatment at -14%. All other SDA categories delivered positive results with dental care in the lead at +23%. TV sales lagged at -14%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 - 15 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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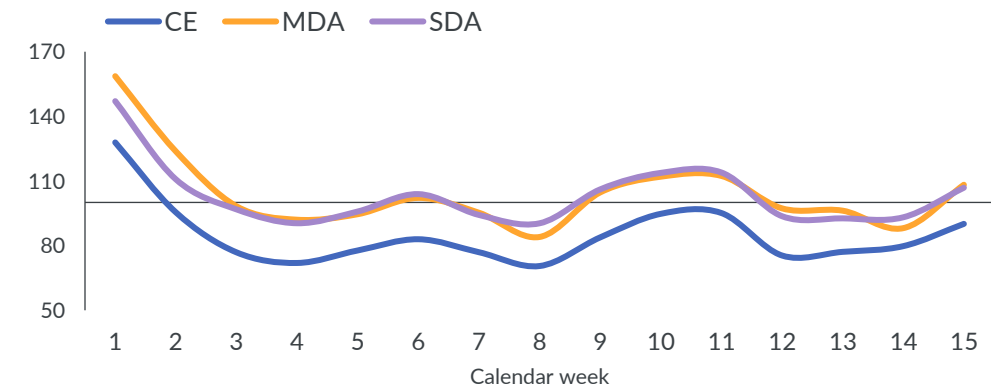
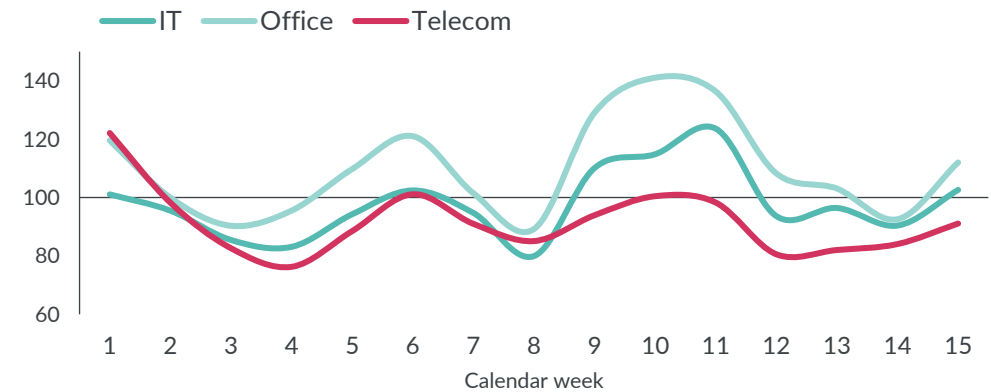
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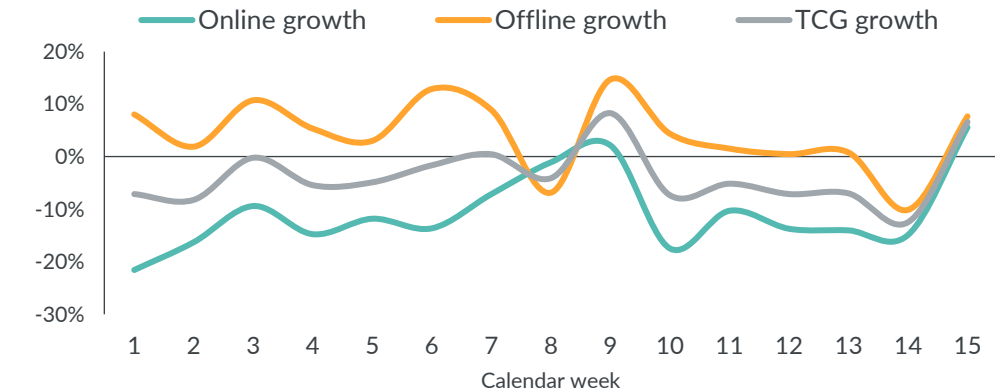
➤ Brazil

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 15 (Apr 10 - Apr 16)



- Traditional retail experienced a plus of 8% versus week 15 in 2022 and online sales were up 6%, resulting in an upswing of 7% for the total TCG.
- The rates for IT/Office products were positive throughout and ranged from +3% for mobile computing to +82% for laser printers. Smartphones lagged at -6%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for all categories with hot beverage makers in the lead at +42% and all others with rates above 10%. Only audio home systems lagged at -3%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 15 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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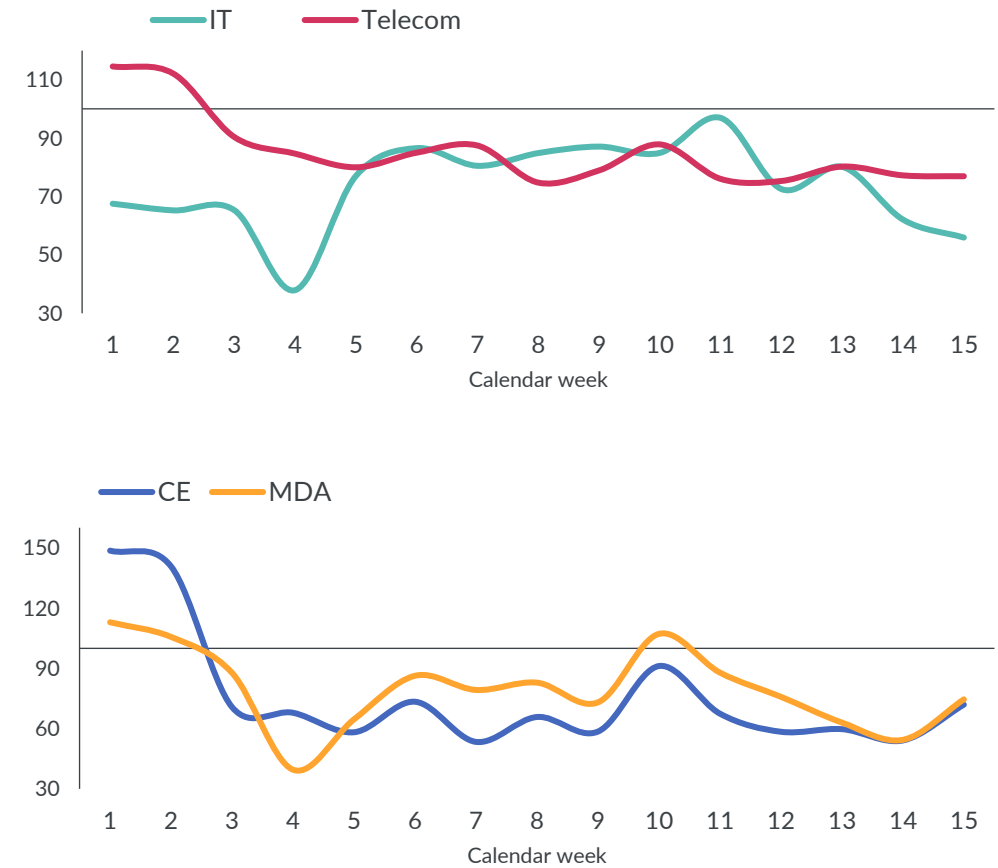
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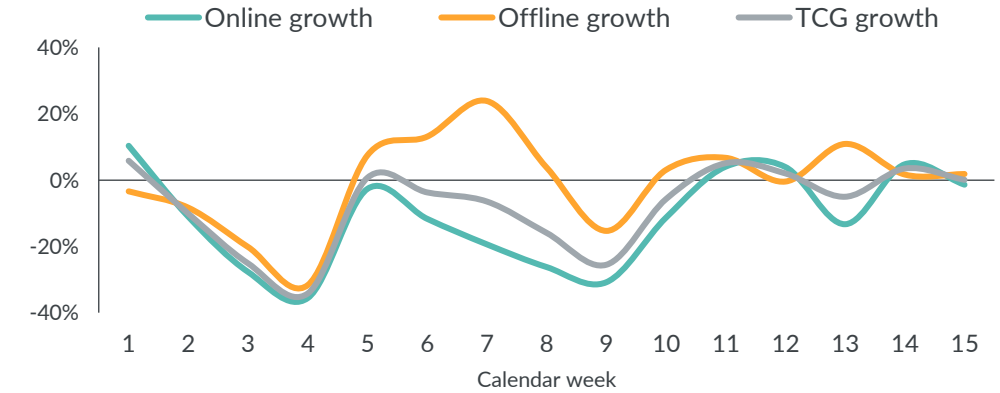


China

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 15 (Apr 10 - Apr 16)



- Online sales (-1%) and traditional retail (+2%) delivered an almost opposite development to each other, which resulted in a flat total TCG market.
- Week 15 in 2023 saw a moderate increase for smartphones (+4%). Mobile computing was flat at -0.2%.
- Washing machines and cooling both posted negative trends at -10% and -13% respectively. TV sales lagged at -5%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 15 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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