



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 154
cw18/2023

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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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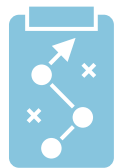
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Fact of the Week

Smart home automation market was stable while other sectors declined



About **gfknewron**

EU7 | USD value & growth % | Jan-Dec 2022 vs 2021

> Fact of the week

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China



**Home
Automation**



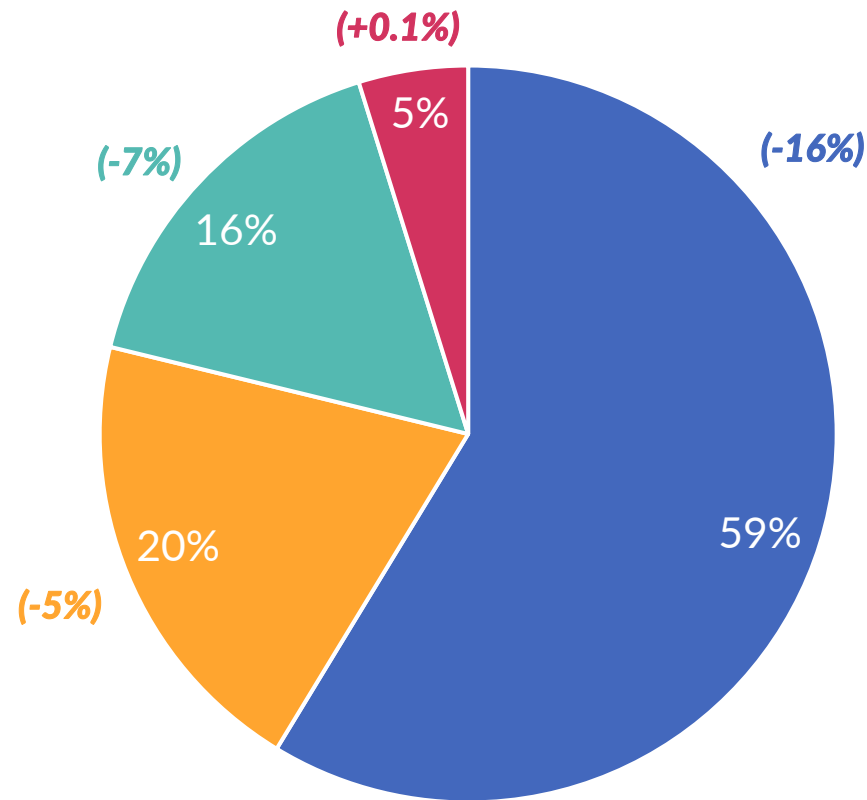
**Small Domestic
Appliance &
Health**



**Major Domestic
Appliances**



**Entertainment
& office**



Total Sales Value
and Value Growth %
Jan-Dec 2022
w/o TV

\$15.3bn
(-7.7%)

(with TV -12.5%
\$27.7bn)

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

Great Britain

France

Italy

Spain

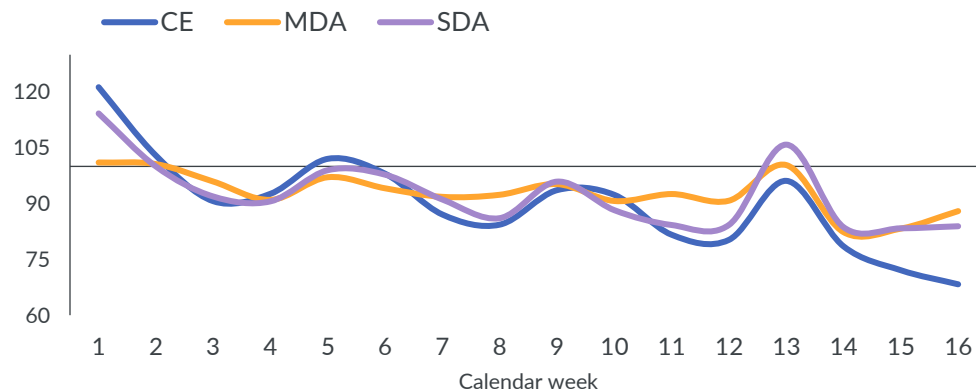
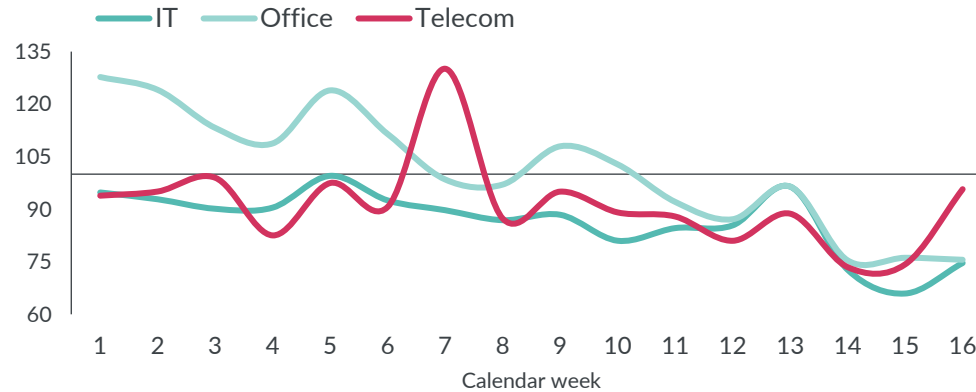
Russia

Japan

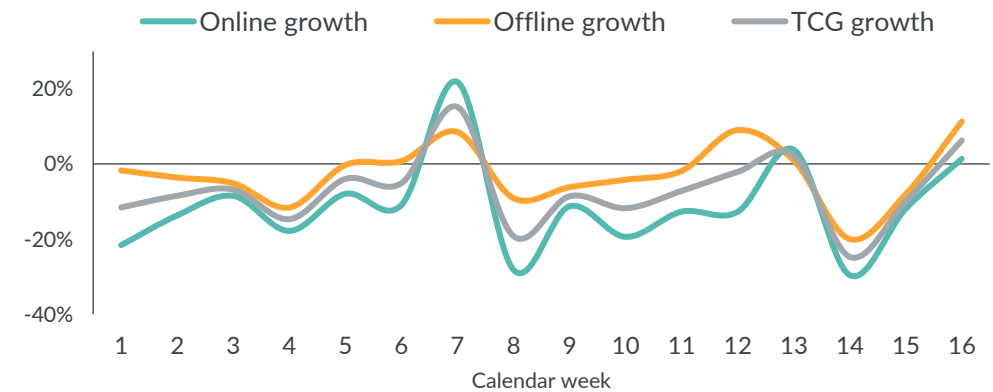
Brazil

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 16 (Apr 17 - Apr 23)



- The total TCG market increased by 6%, driven by traditional retail at +11%. Online sales were weak at +1%.
- Monitors were the best performing product group in IT/Office at +16%. Desk computing and media tablets lost 3% and 4% respectively. Smartphones accelerated at +9%.
- The weakest product group in SDA was air treatment at -36%. Vacuum cleaners and dental care on the other hand gained 22% and 20% respectively. TV sales decreased by 3%. MDAs were up 7%.

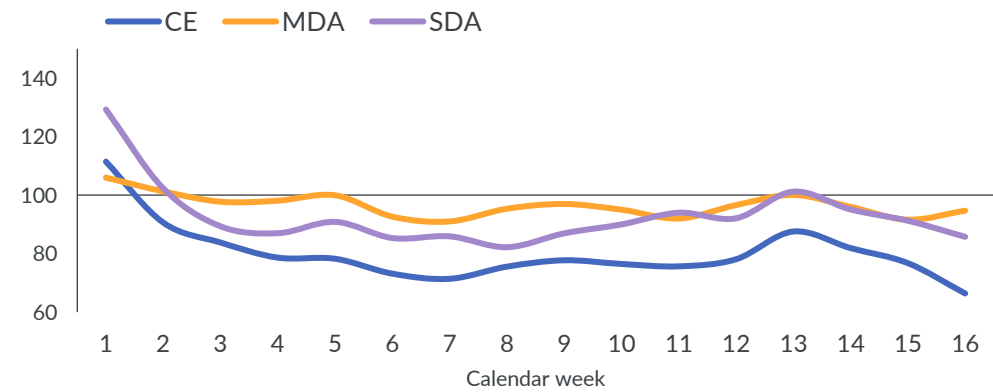
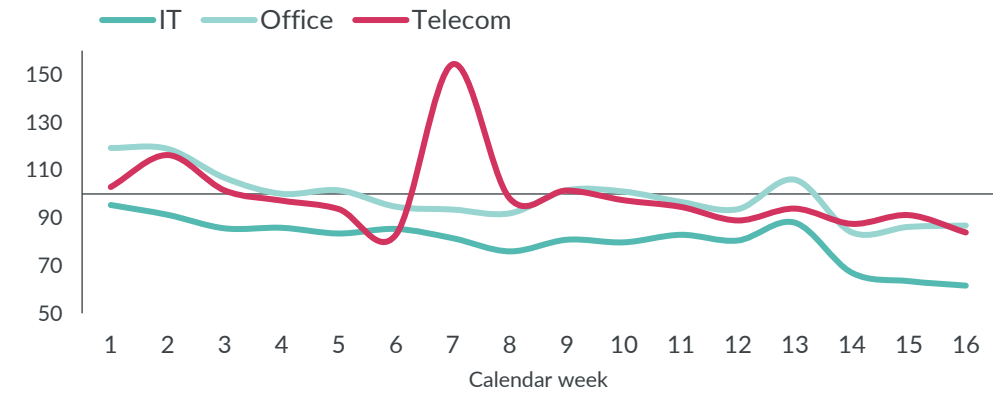
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

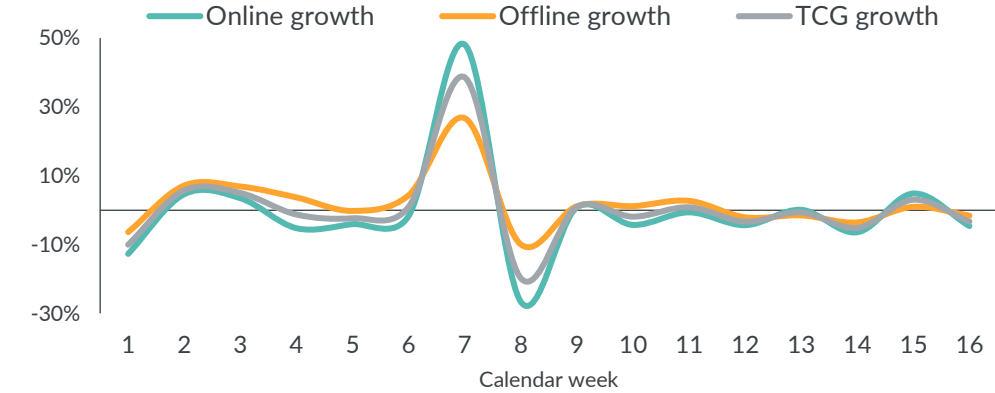


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 16 (Apr 17 - Apr 23)

- Deceleration of online sales (-5%) dragged the total TCG market down by 3%. Traditional retail added to it at -2%.
- IT hardware lost in double digits, led by media tablets at -40% while peripherals were positive, with mice being the best performing product group in IT/Office at +16%. Smartphones accelerated at +5%.
- TV sales and audio home systems declined by 15% while soundbars were flat. The mixed picture for MDA and SDA saw dental care in the lead at +19% and food preparation bringing up the rear at -7%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 - 16 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



About **gfknewron**

Fact of the week

Germany

Great Britain

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Italy

Spain

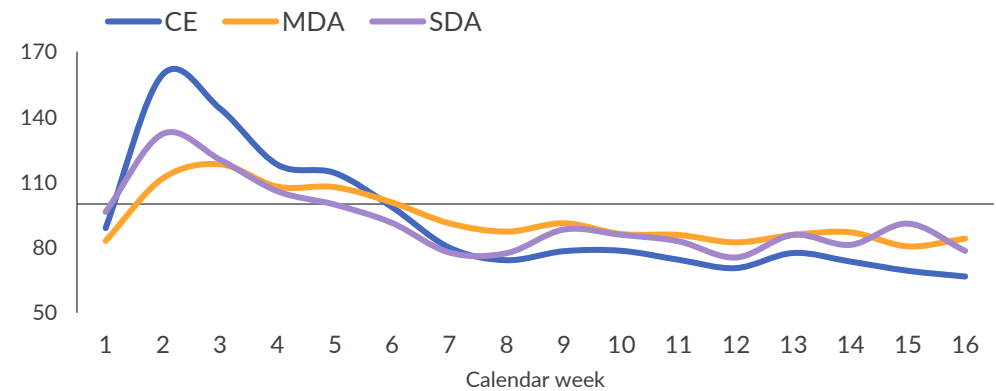
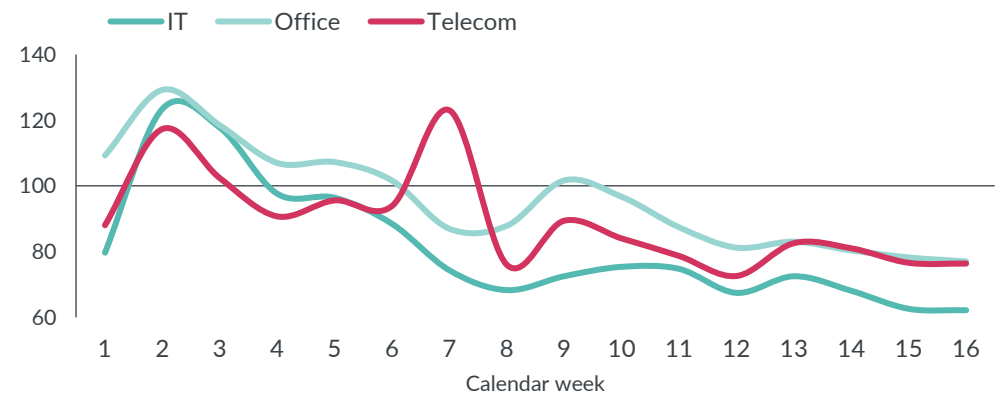
Russia

Japan

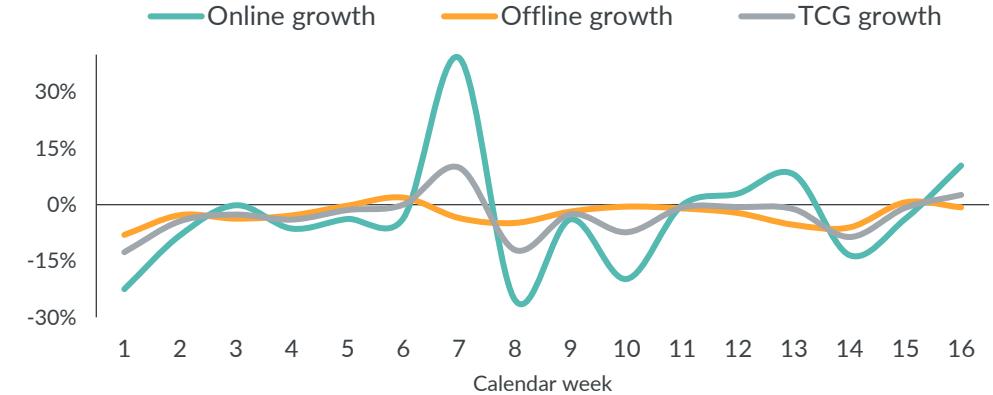
Brazil

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 16 (Apr 17 - Apr 23)



- Traditional retail was down -1% (+1% the previous week), but online sales delivered +10% (-4% the previous week), resulting in a slight upswing of the total TCG market of 3%.
- Rates for IT/Office products ranged from +10% for mice to -23% for desk computing. Laser printers were down 16%. Both smartphones and headsets accelerated at 10%.
- The mixed picture for MDA/SDA/CE products ranged from -18% for food preparation and dental care up to +34% for air treatment. Soundbars were flat. TV sales were weak at +1%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 16 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

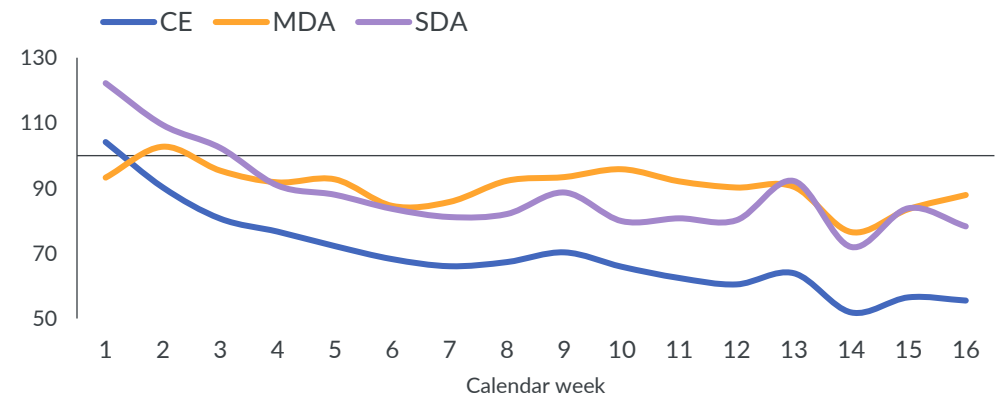
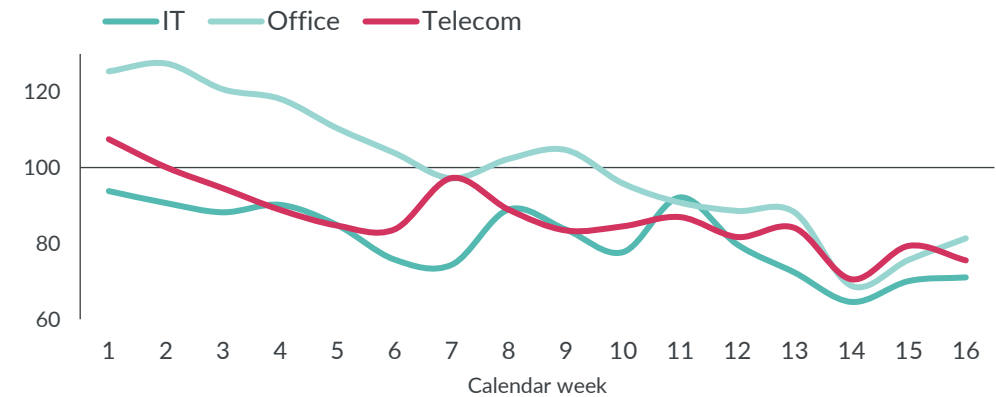
Russia

Japan

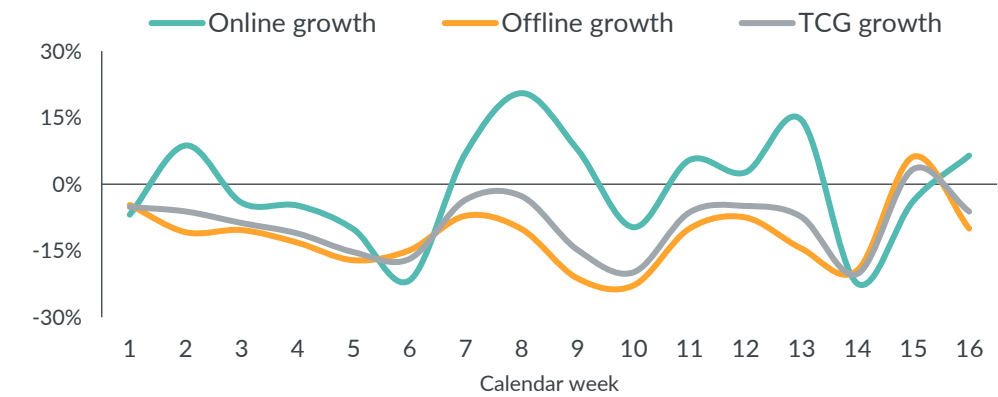
Brazil

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 16 (Apr 17 - Apr 23)



- Online sales experienced a plus of 6% vs week 16 in 2022, but this failed to compensate for the losses of traditional retail (-10%) and left the total TCG at a minus of 6%.
- Laser printers delivered an exceptional +42%. Mobile computing and media tablets were down by 4%. Smartphones were flat at +0.5%.
- CE products lost in solid double digits, led by TVs posting -35%. Cooling and washing machines gained 11% and 15% respectively. The picture for SDA was mixed with air treatment at -46% and hot beverage makers at +17%. Food preparation was flat at -0.9%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 16 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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Italy

➤ Spain

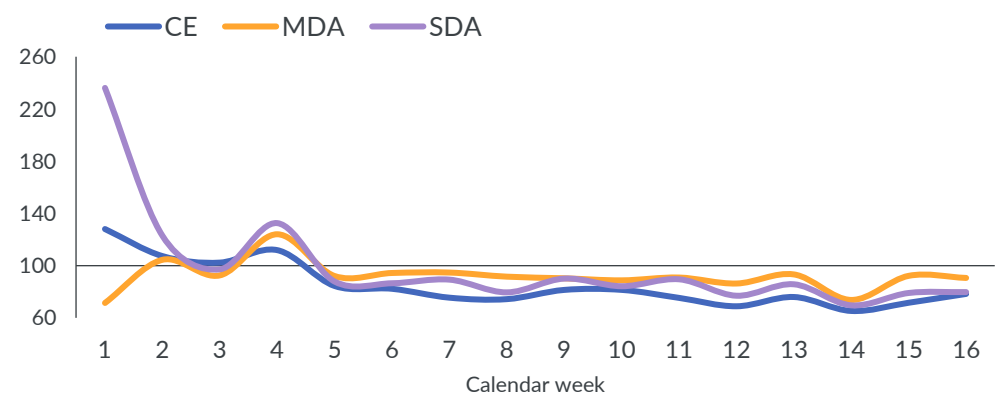
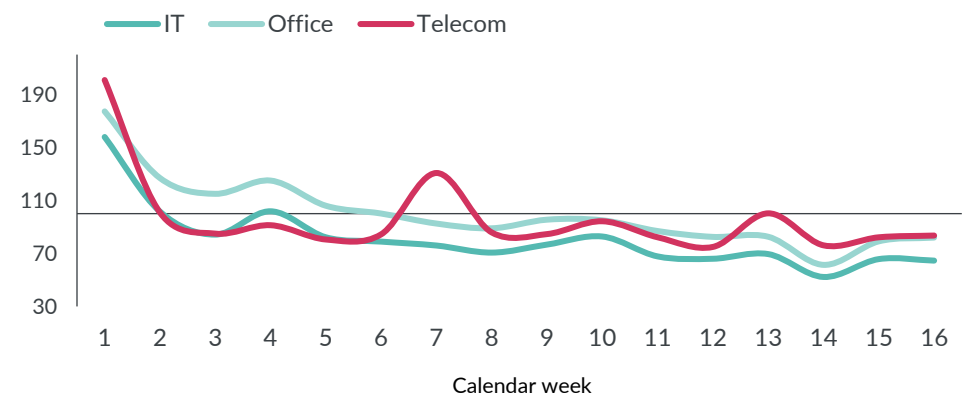
Russia

Japan

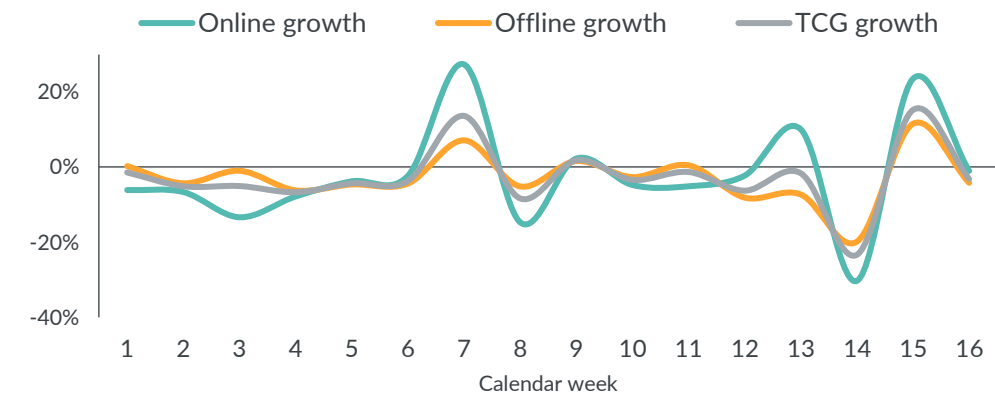
Brazil

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 16 (Apr 17 - Apr 23)

- Traditional retail experienced a minus of 4% in week 16 and online sales were down by 1%, resulting in a downswing of the total TCG market of 3%.
- Media tablets (-30%) was the worst performing product group among IT/Office products. Desk computing slumped at -26%. Laser printers at +6% were the only positive category. Smartphones gained 5%.
- CE products posted a mixed picture with soundbars in the lead at +30% and audio home systems delivering -8%. MDAs and SDAs experienced a mixed development, too, ranging from +12% for vacuum cleaners to -1% for washing machines and shavers.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 - 16 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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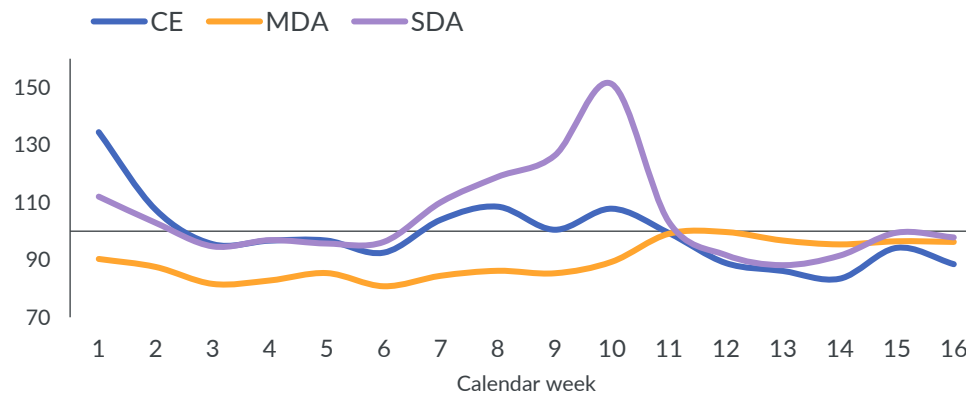
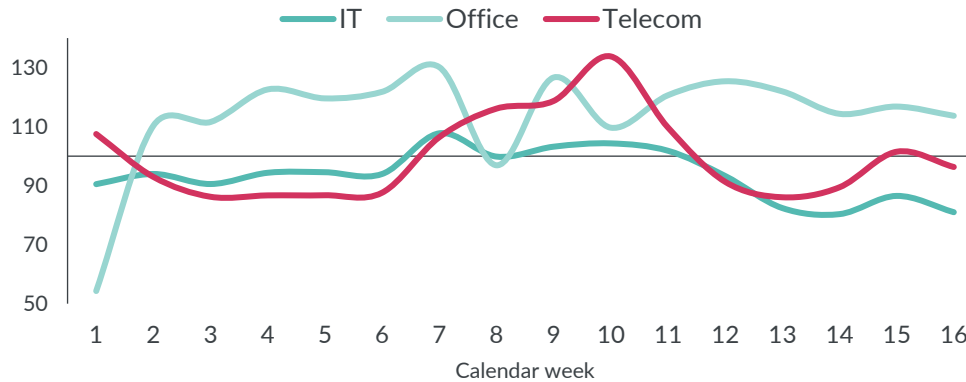
> Russia

Japan

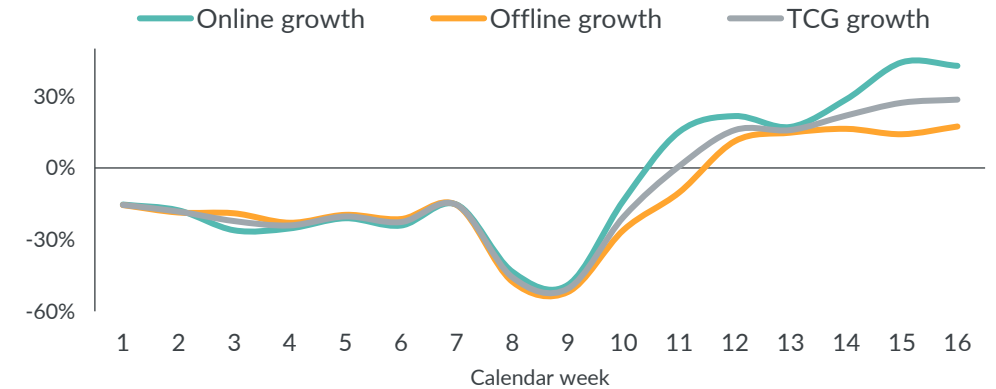
Brazil

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 16 (Apr 17 - Apr 23)



- The extraordinary growth of online sales (+43%) led to an uplift of 29% for the total TCG market. Traditional retail at +17% added to it.
- All IT/Office products delivered strong double-digit results with inkjet printers in the lead at +69%. Only desk computing was negative at -3%. Smartphones accelerated at +40%.
- The overall positive picture for MDA, SDA, and CE products was led by audio home systems at +91%. All other categories posted growth of more than 30%. The exceptions were soundbars (-17%), dental care (-8%), food preparation (-6%), and shavers (-2%).

Weekly retail insights from the Point of Sale

Spotlight on Japan



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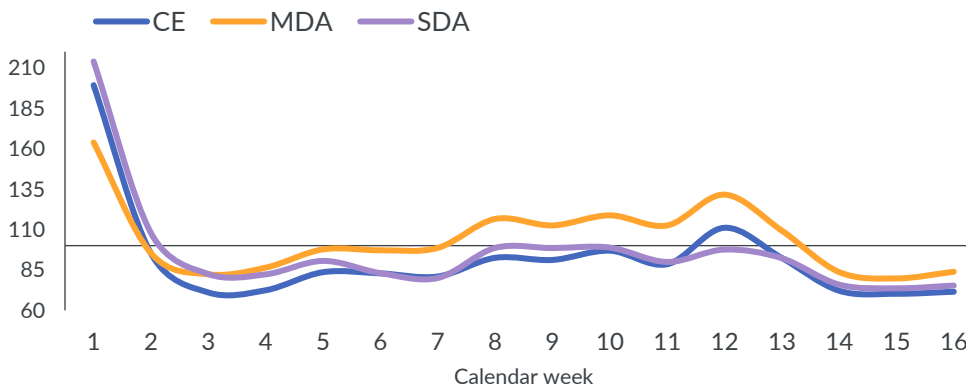
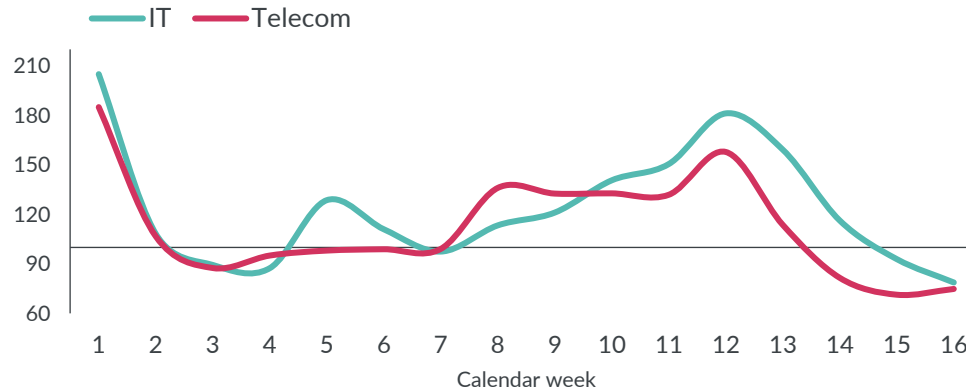
Russia

➤ Japan

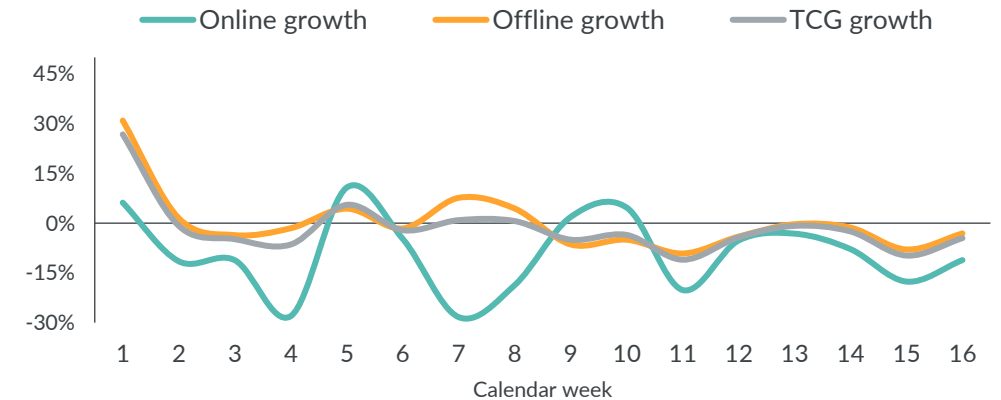
Brazil

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 16 (Apr 17 – Apr 23)



- As in past weeks, online sales dropped, this time at -11% in week 16. As traditional retail decreased as well (-3%), the total TCG market fell by 4%.
- The driver of this development was media tablets at -30%. Mobile computing posted -6%. Smartphones delivered -9%. Headsets were up 5%.
- Washing machines and cooling were negative at -0.7% and -2%. The overall positive picture for SDAs with dental care in the lead at +26% was clouded by vacuum cleaners at -3%. While TV sales lagged at -11%, soundbars gained 3%. Audio home systems were flat.

Weekly retail insights from the Point of Sale

Spotlight on Brazil



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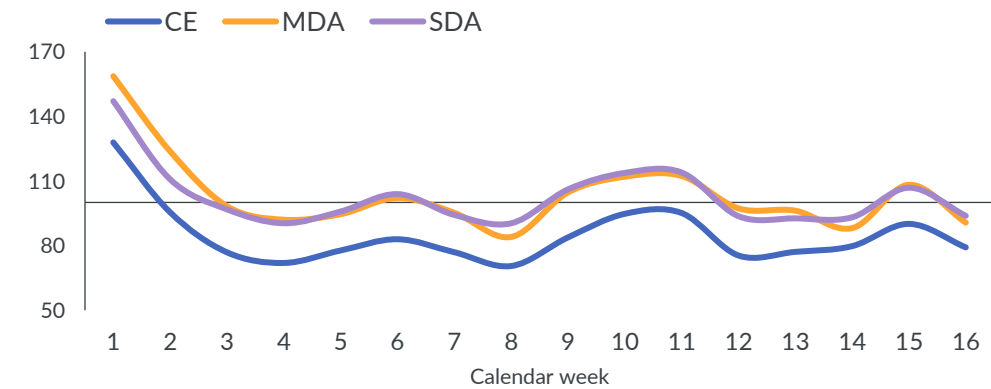
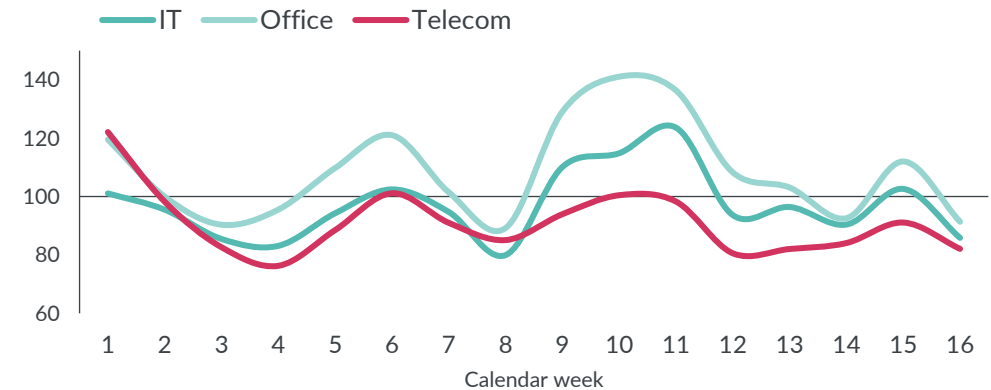
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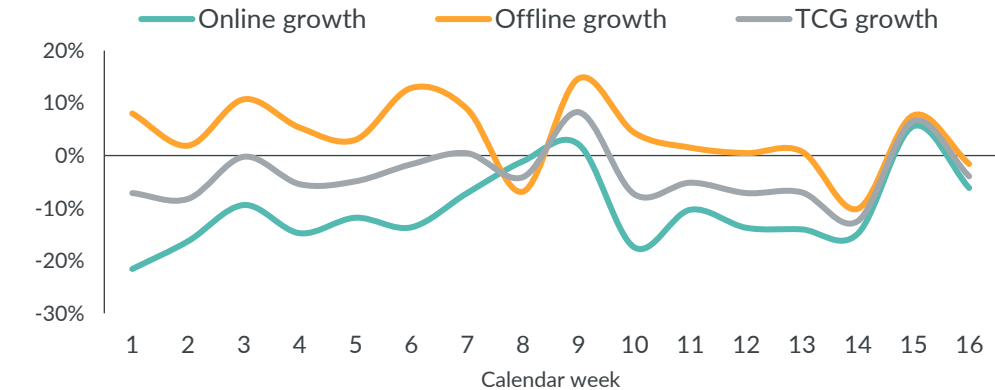
> Brazil

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 16 (Apr 17 - Apr 23)



- Both distribution types decelerated, traditional retail at -2% and online sales at -6% which led to a decrease of the total TCG market of 4%.
- The rates for IT/Office products ranged from -11% for mobile computing and desk computing to +60% for laser printers and +42% for media tablets. Smartphones slumped at -11%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+28%), shavers (+20%), and vacuum cleaners (+12%). TV sales experienced a slight uptick of 1%. Audio home systems posted a negative trend (-14%).

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 - 16 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 - 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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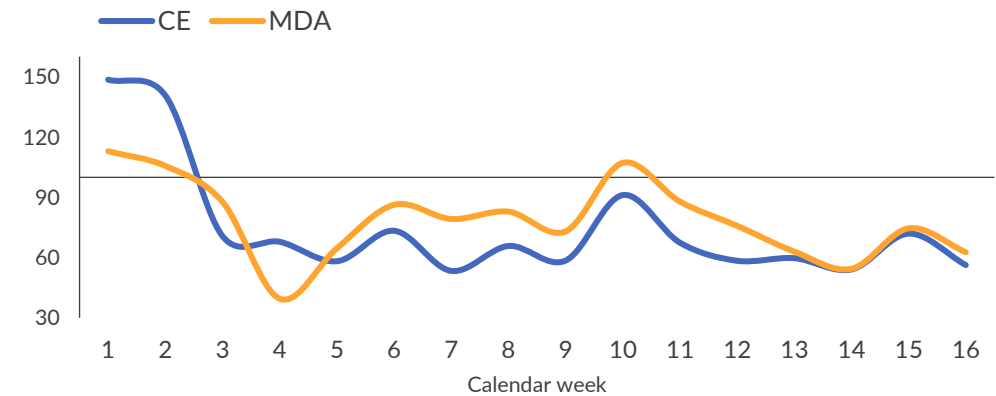
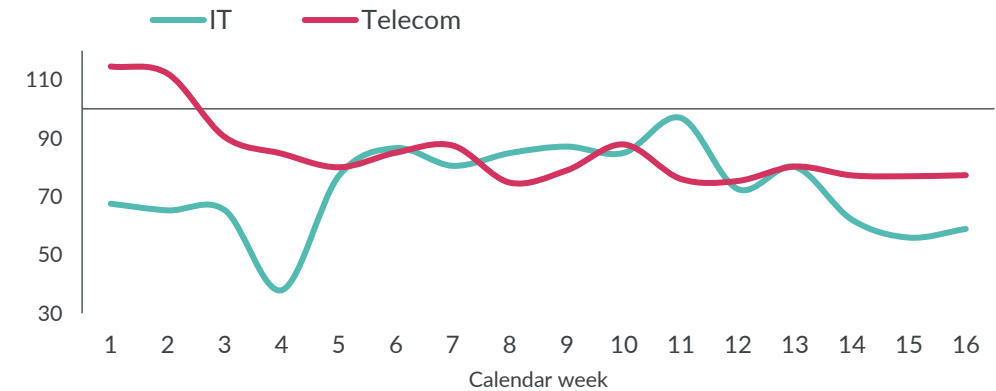
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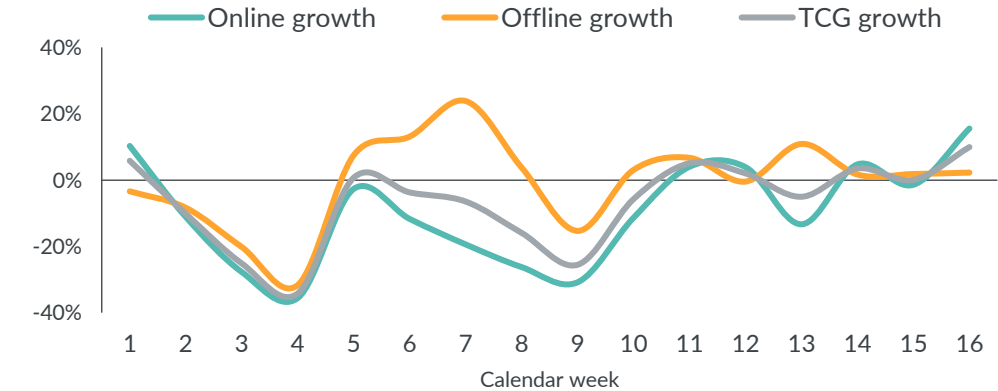
Brazil

> 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 16 (Apr 17 – Apr 23)



- A strong recovery for online sales at +16% (up from -1% in week 15) led to an upswing for total TCG of 10% as online sales were also positive at +2%.
- Mobile PCs accelerated at 14%. Smartphones delivered a good result of +9%.
- Week 16 in 2023 saw solid increases for washing machines (+24%). Cooling was less successful at +4%. TV sales gained 5%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 16 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.



Growth
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Knowledge

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