



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 155

cw19/2023

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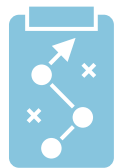
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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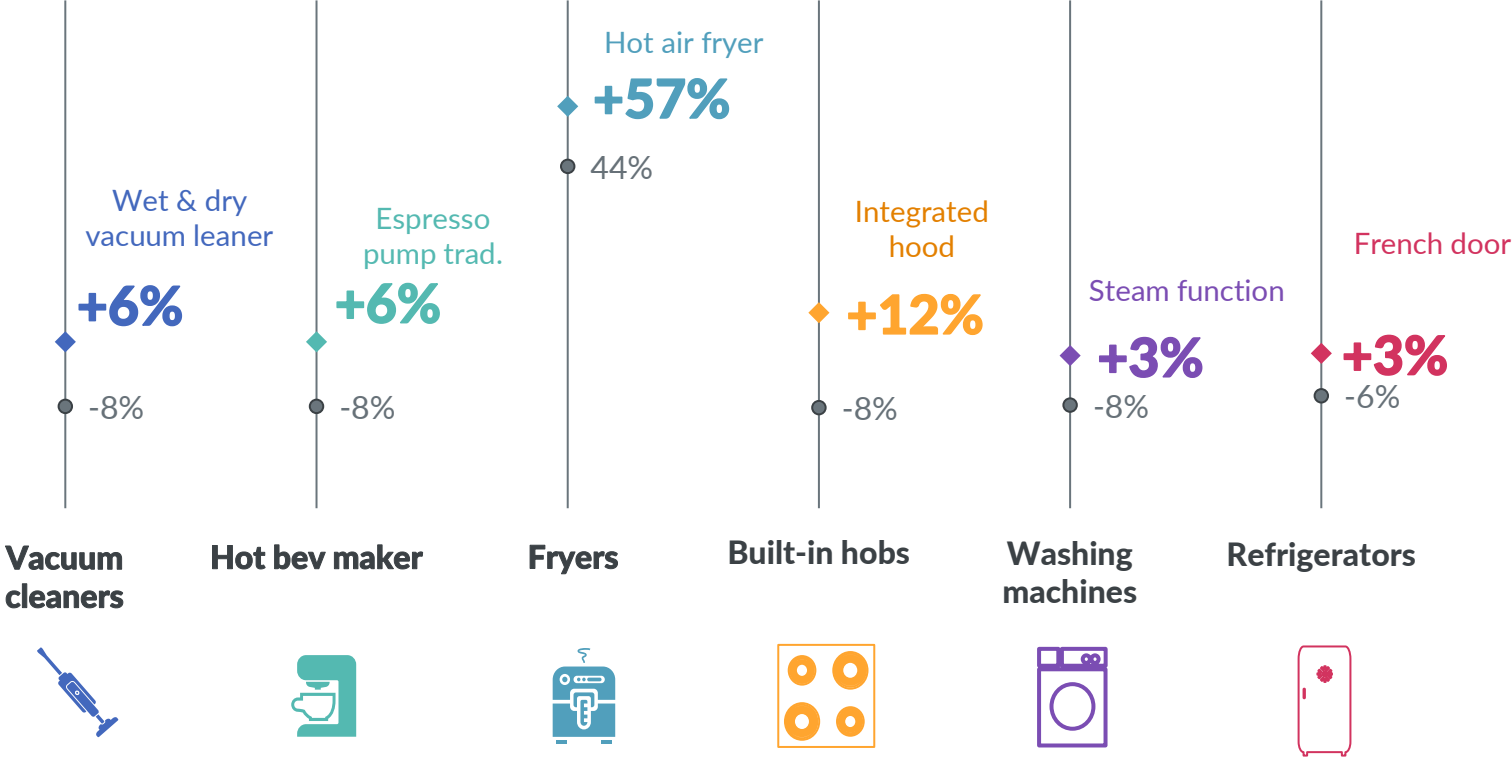
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Fact of the Week

Premium feature sales increased more than category average



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



Source: GfK Market Intelligence Tracking Retailer Market Sales Value USD growth rate YoY, Jan-Dec 2022

Weekly retail insights from the Point of Sale

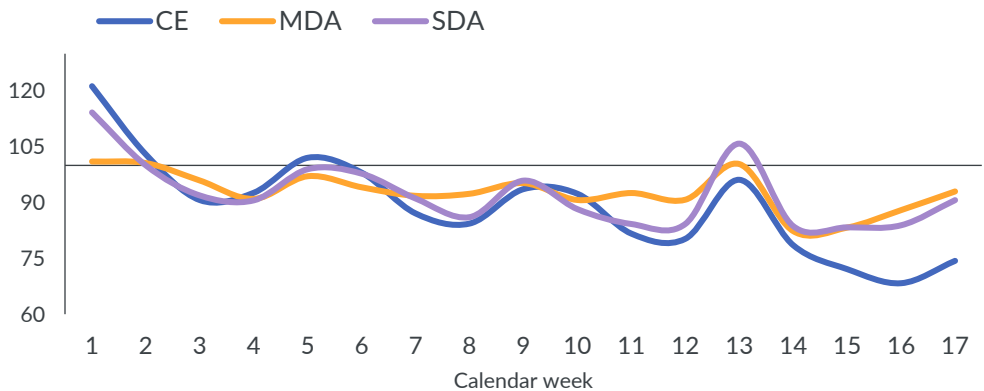
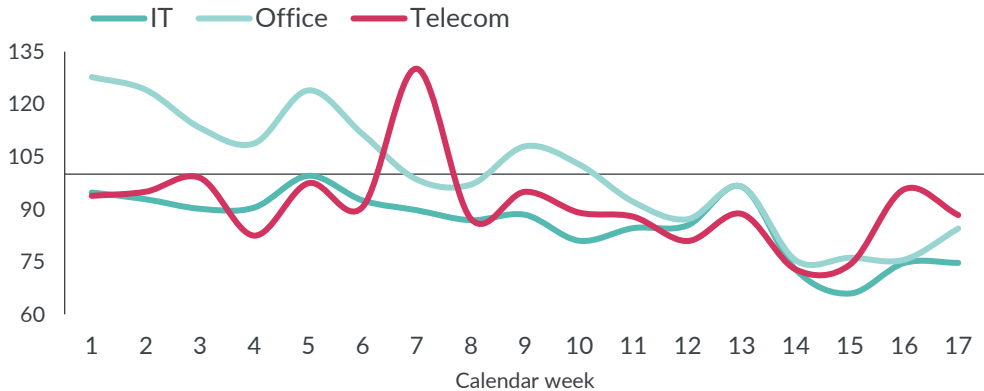
Spotlight on Germany



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

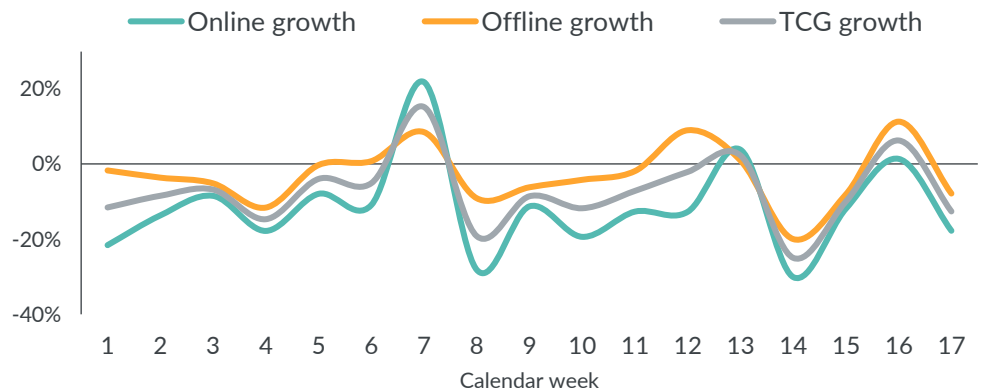
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 17 (Apr 24 - Apr 30)



- The total TCG market dropped by 13%, driven by online sales at -18%. Traditional retail added to it at -8%.
- Except for laser printers at +12%, all IT/Office products delivered negative trends, ranging from -4% for monitors to -21% for media tablets. Smartphones slumped at -19%.
- While CE products also delivered negative trends (TVs posting -11%), MDAs and SDAs posted a mixed picture with vacuum cleaners out in front at +12% and air treatment bringing up the rear at -17%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 - 17 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.

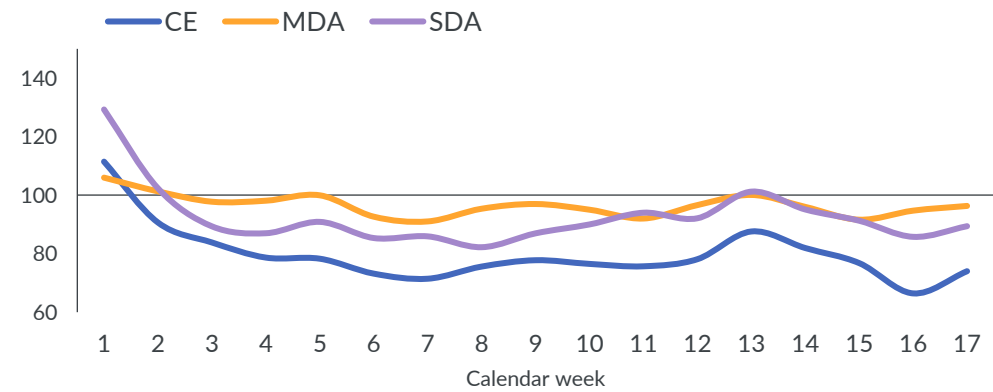
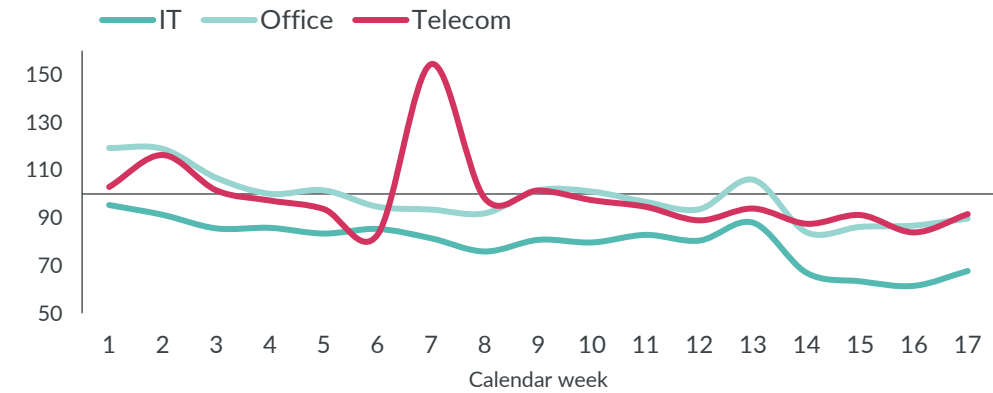
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

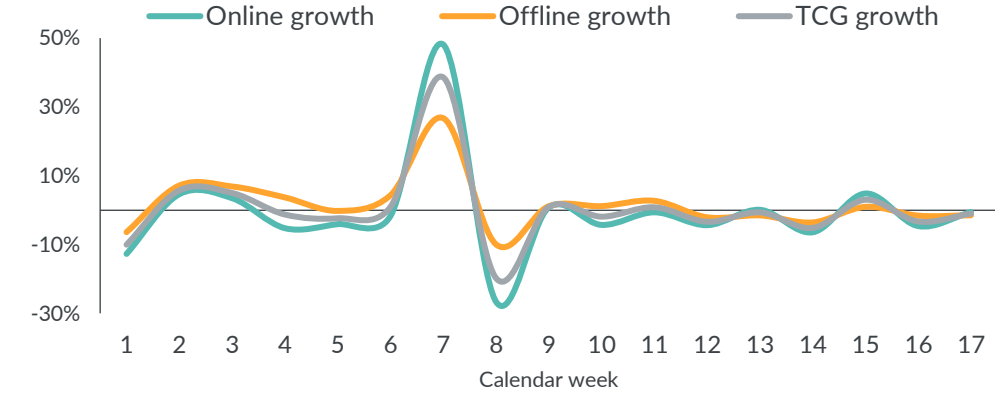


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

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 17 (Apr 24 - Apr 30)



- Similar rates of -2% for traditional retail and -1% for online sales dragged the total TCG market slightly down by 1%.
- Laser printers were the best performing product group in week 17, at a moderate +9%. IT hardware lost in double-digits with media tablets posting the highest decrease at -27%. Smartphones accelerated at +8%.
- MDAs, SDAs, and CE products experienced mixed trends with categories losing and gaining. While TVs were down 11%, soundbars were up 12%. Cooling posted -6% and washing machines won 10%. Shavers lagged at -2% and dental care increased by 11%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 17 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

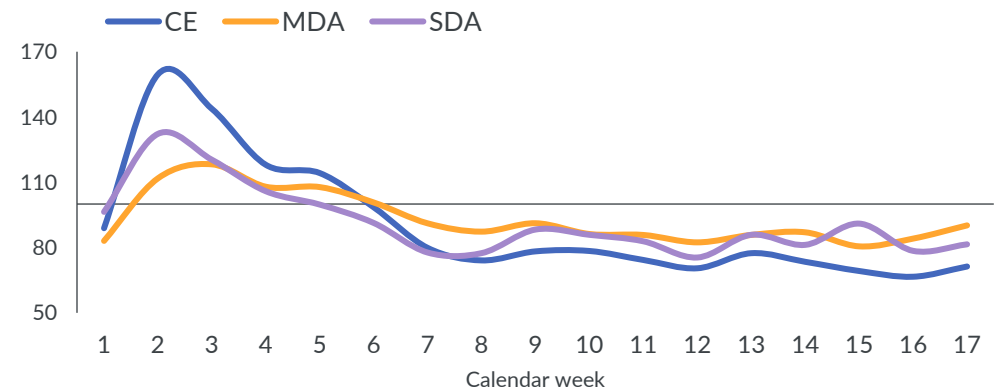
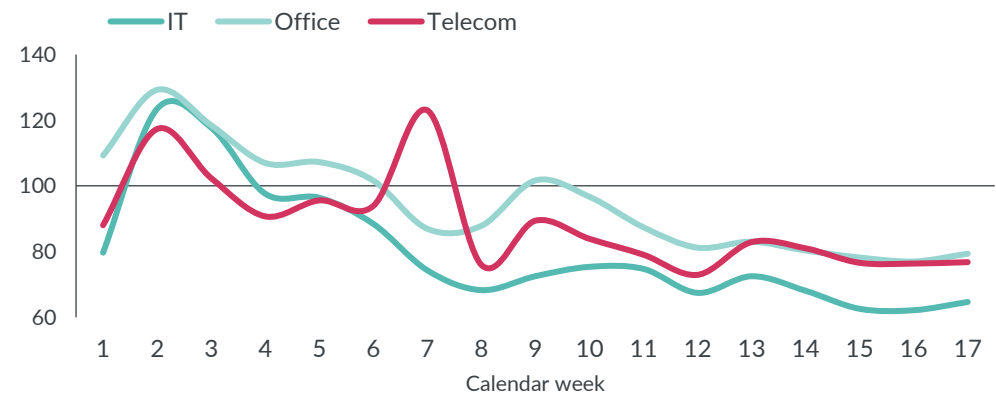
Russia

Japan

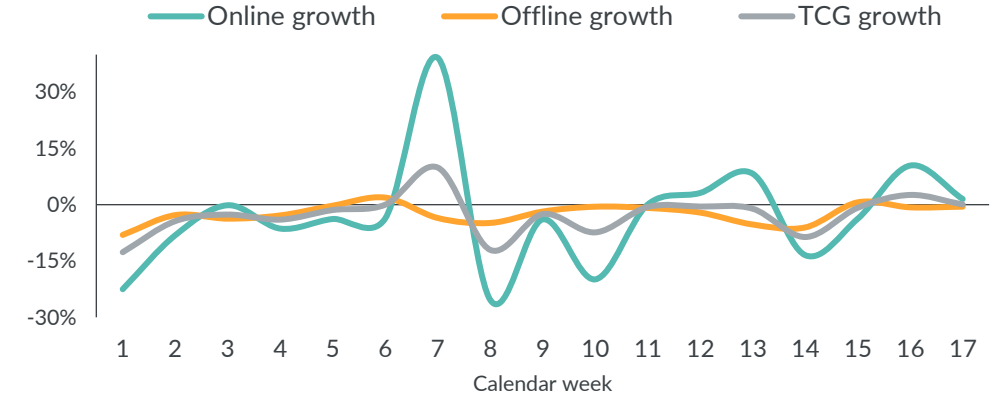
Brazil

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 17 (Apr 24 - Apr 30)



- Online sales (+1%) and traditional retail (-1%) delivered an almost opposite result to each other, resulting in a flat total TCG market.
- Smartphones were nearly flat at +1%. While peripherals increased moderately, desk computing and laser printers declined by 23% and 24% respectively.
- Air treatment stood out at +84%. At the other end of the scale, food preparation posted -22%. MDAs and the other SDA categories delivered single-digit rises and falls, as did the CE categories with TVs up by 5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 17 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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Fact of the week

Germany

Great Britain

France



Italy

Spain

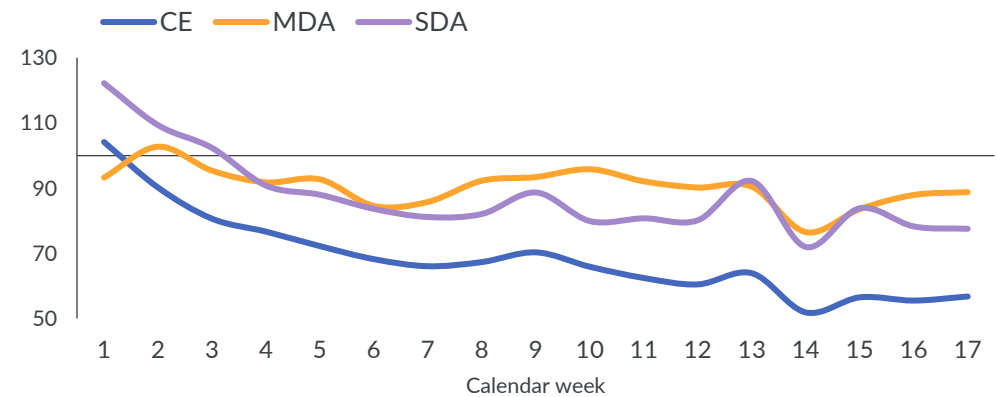
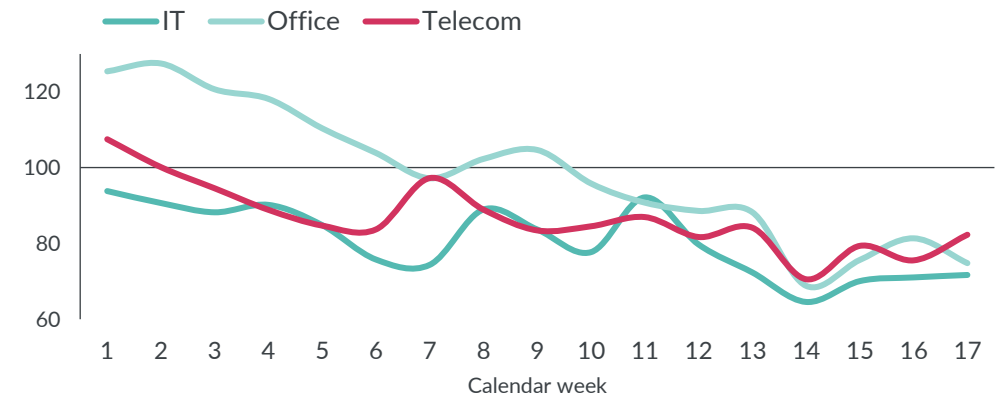
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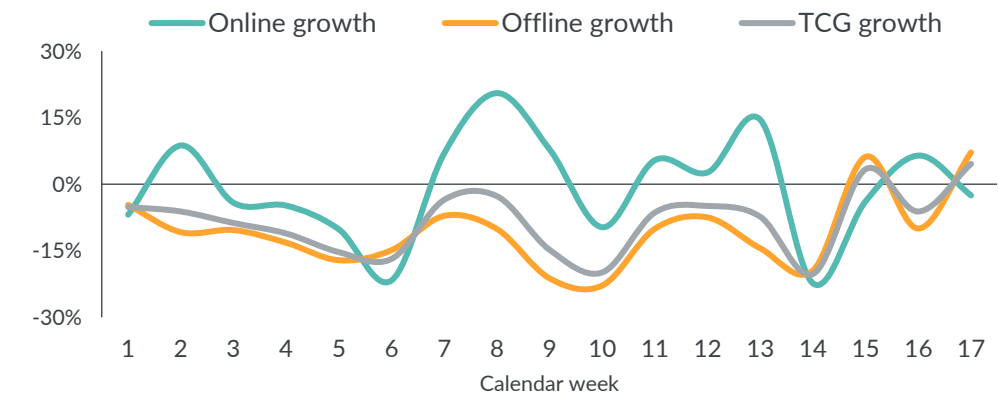
Brazil

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 17 (Apr 24 - Apr 30)



- Online sales decelerated by 2% but traditional retail at +7% compensated for the losses and boosted the total TCG market to +5%.
- Laser printers delivered a remarkable +31%. Desk computing at -8% was the only category in IT/Office products with a negative trend. Smartphones accelerated at +13%.
- Except for air treatment at -5% and dental care at +3%, all other SDA and MDA categories witnessed double-digit increases with hot beverage makers in the lead at +27%. CE products delivered negative trends with TVs posting -26%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 17 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

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Great Britain

France

Italy

> Spain

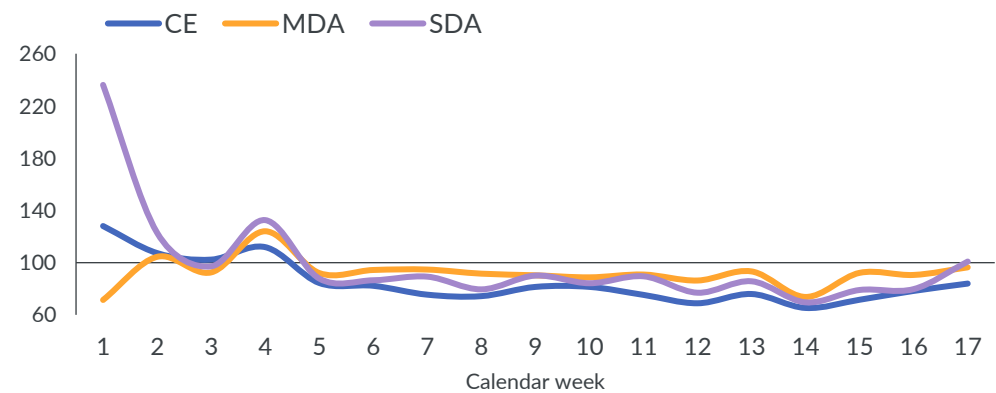
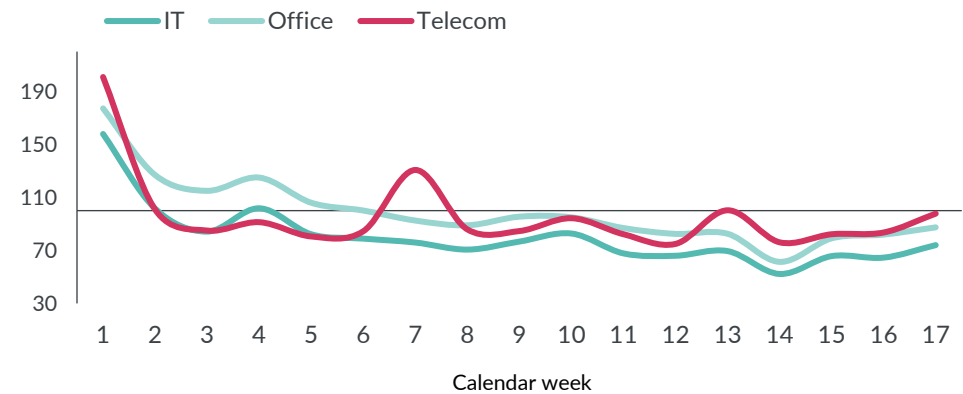
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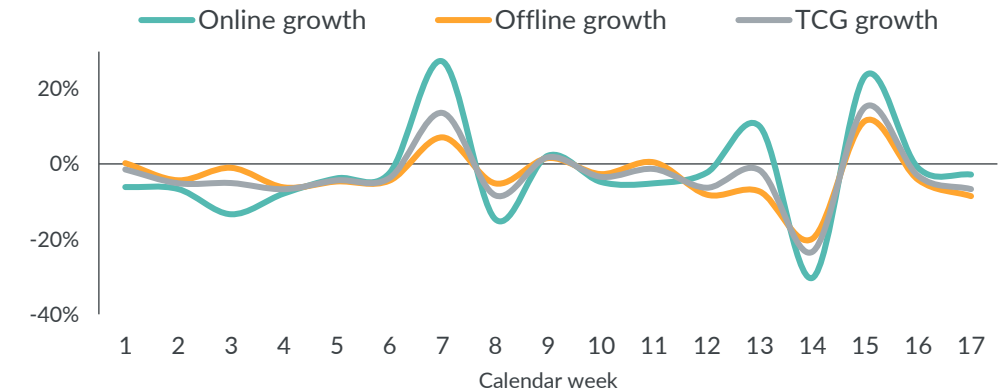
Brazil

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 17 (Apr 24 - Apr 30)



- Traditional retail experienced a minus of 9% versus week 17 in 2022 and online sales were down by -3%, resulting in a downswing of the total TCG market of 7%.
- Media tablets (-25%) was the worst-performing product group among IT/Office products. Desk computing slumped at -22%. While headsets were flat, smartphones gained 3%.
- MDA/SDA/CE products posted an overall negative picture with audio home systems at -30%, TVs at -18%, and hot beverage makers at -11%. Cooling and soundbars were flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 17 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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Fact of the week

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France

Italy

Spain

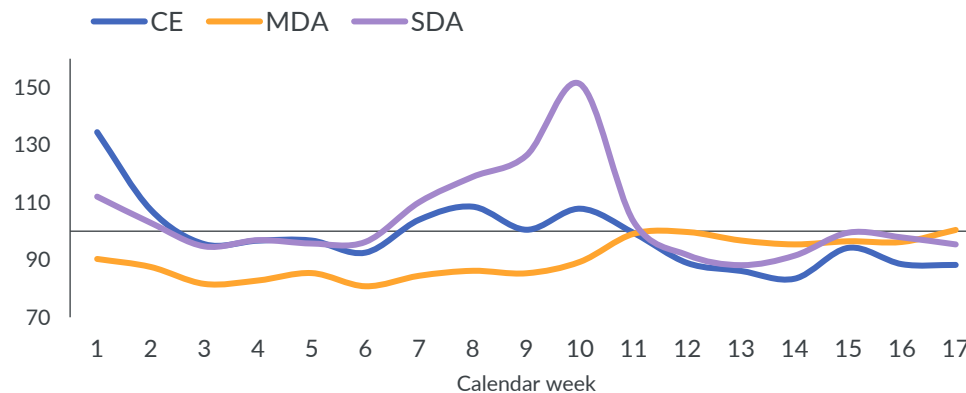
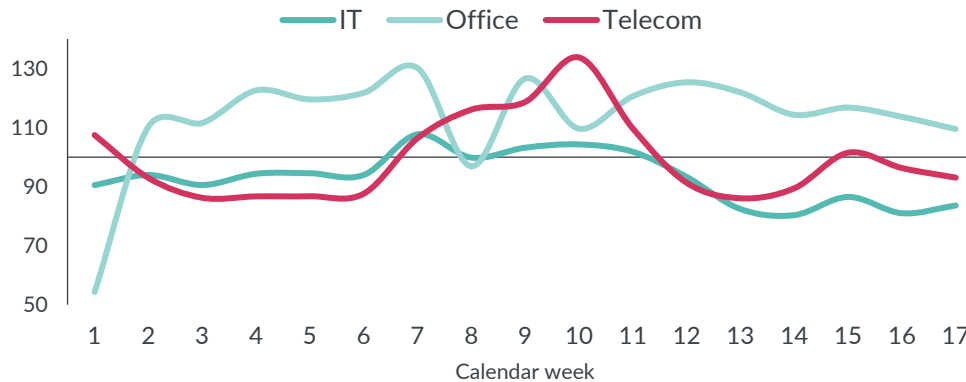
> Russia

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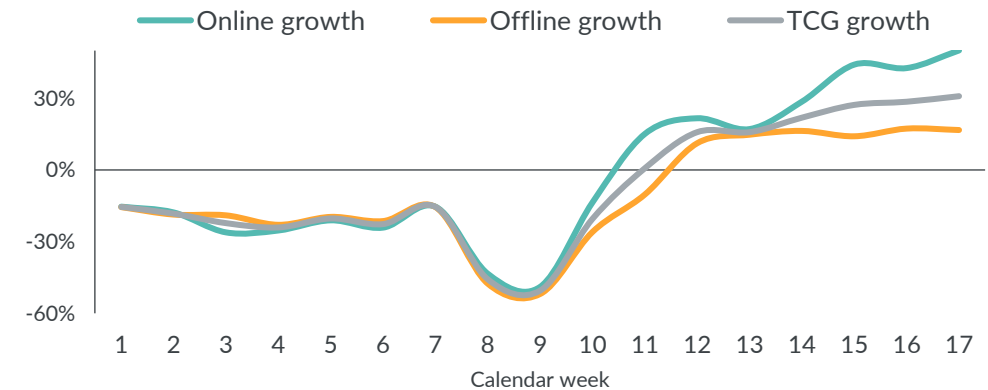
Brazil

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 17 (Apr 24 - Apr 30)



- The extraordinary growth of online sales (+50%) led to an uplift of 31% 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 +59%. Only desk computing was negative at -11%. Smartphones accelerated at +32%.
- The overall positive picture for MDA, SDA, and CE products was led by audio home systems at +92%. Most other categories posted growth of more than 30%. The exceptions were soundbars (-6%), dental care (-5%), food preparation (+8%), and shavers which were flat.

Weekly retail insights from the Point of Sale

Spotlight on Japan



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Fact of the week

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Great Britain

France

Italy

Spain

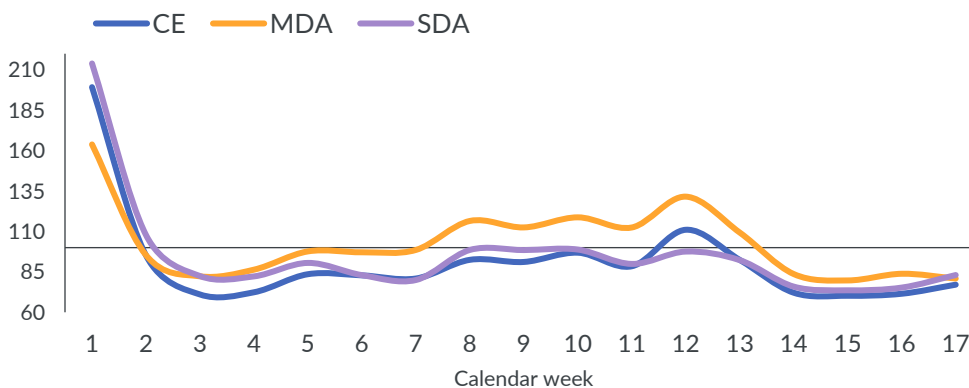
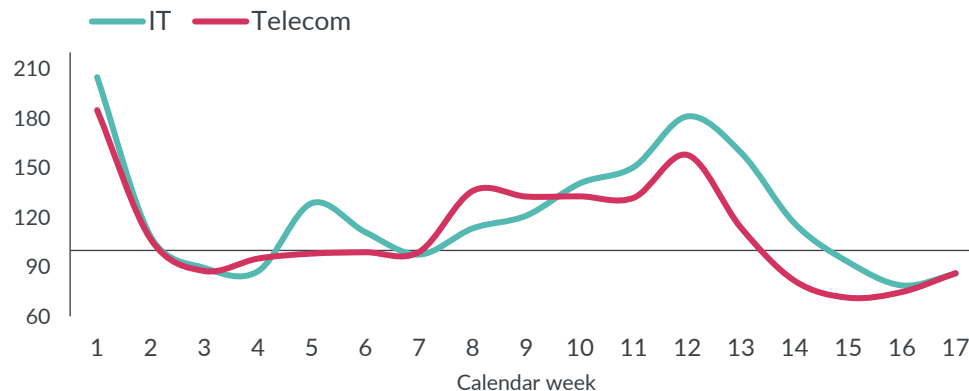
Russia

➤ Japan

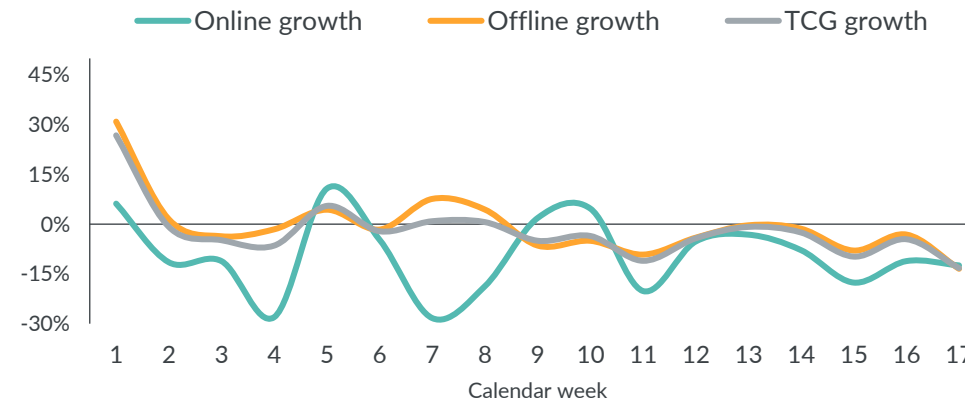
Brazil

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 17 (Apr 24 - Apr 30)



- As in past weeks, online sales dropped, this time at -12% in week 17. As traditional retail decreased, too (-13%), the total TCG market fell by 13%.
- The driver of this development was media tablets at -23%. Mobile computing posted -14%. Smartphones delivered -11%. Headsets were up 8%.
- Besides media tablets, air treatment, and TVs delivered negative trends at -24% and -20% respectively. MDAs posted -15%. Dental care was the ray of light, enjoying an acceleration of 27%.

Weekly retail insights from the Point of Sale

Spotlight on Brazil



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Fact of the week

Germany

Great Britain

France

Italy

Spain

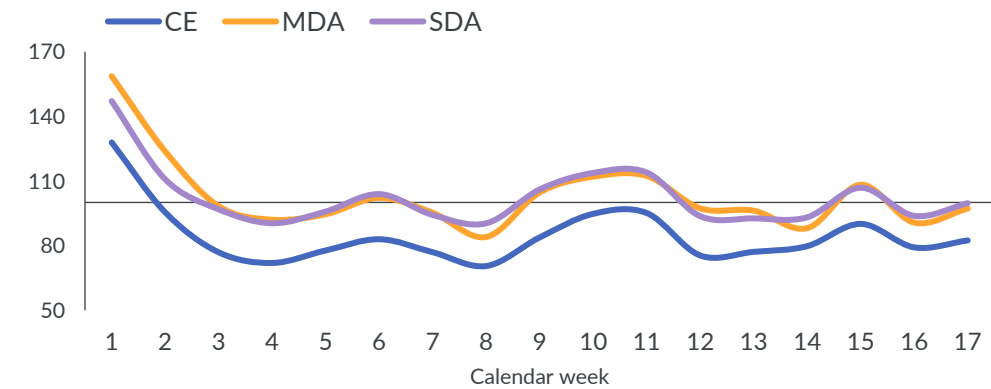
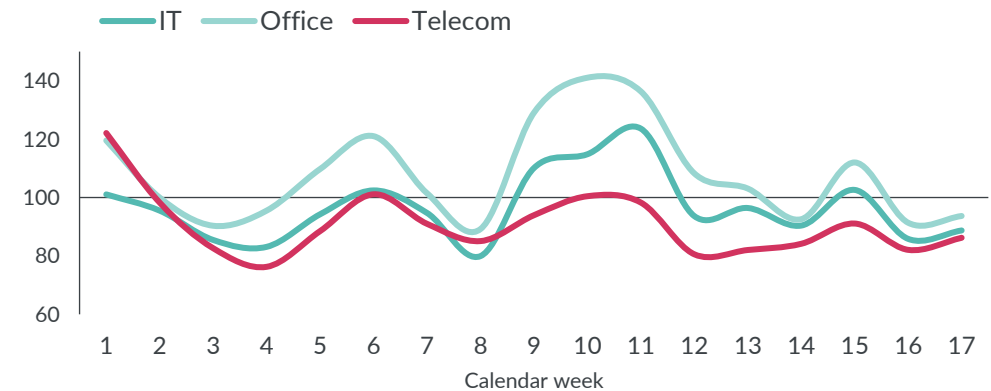
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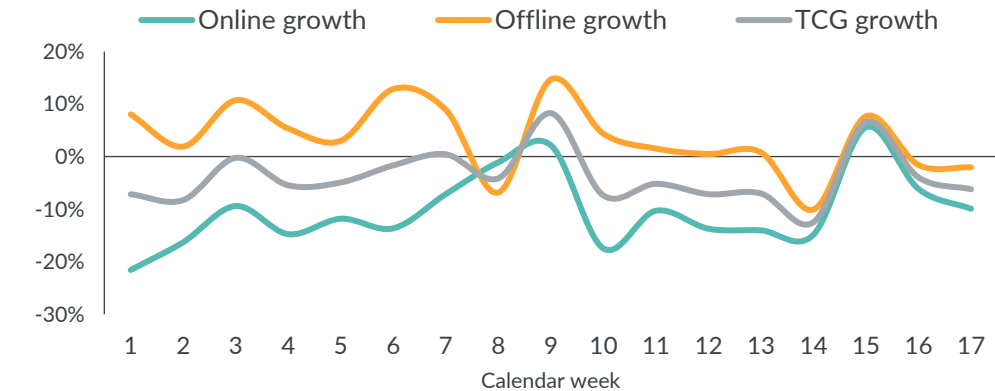
➤ Brazil

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 17 (Apr 24 - Apr 30)



- Both distribution types decelerated, traditional retail at -2% and online sales at -10% which led to a decrease of the total TCG market of 6%.
- The rates for IT/Office products ranged from -11% for inkjet printers to +24% for laser printers and +23% for media tablets. Smartphones slumped at -15%.
- The overall positive picture for MDA/SDA/CE product groups delivered double-digit growth for hot beverage makers (+18%), shavers (+20%), and vacuum cleaners (+12%). TV sales experienced a slight uptick of 2%. Audio home systems posted a negative trend (-24%).

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 17 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

Germany

Great Britain

France

Italy

Spain

Russia

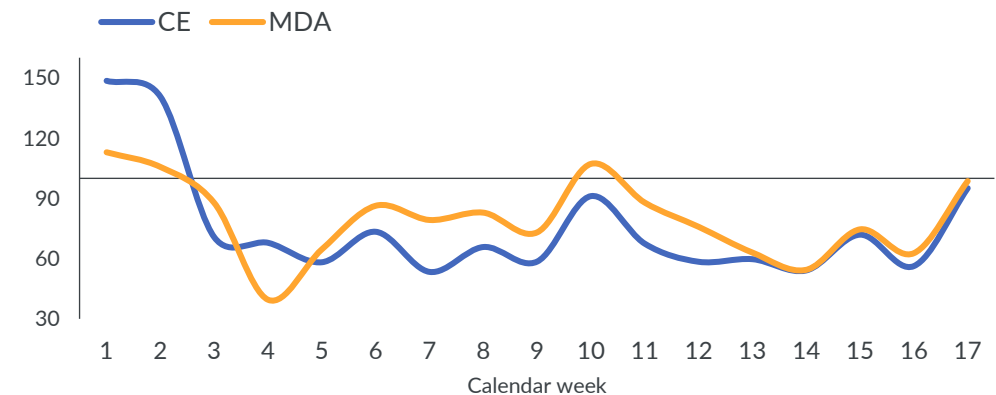
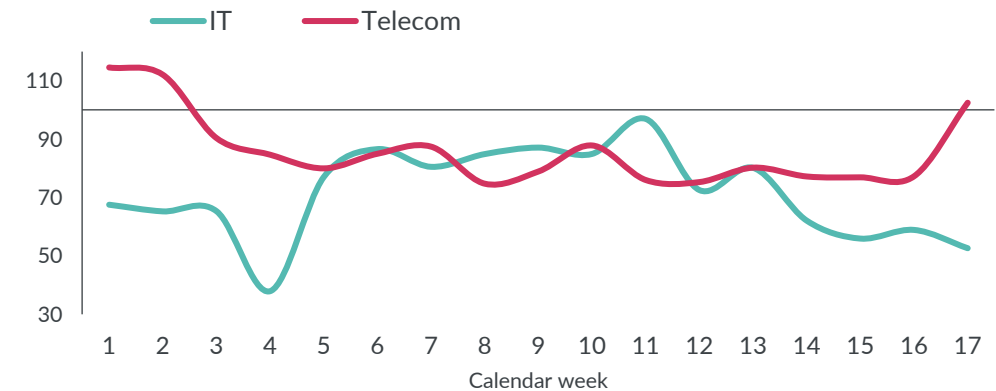
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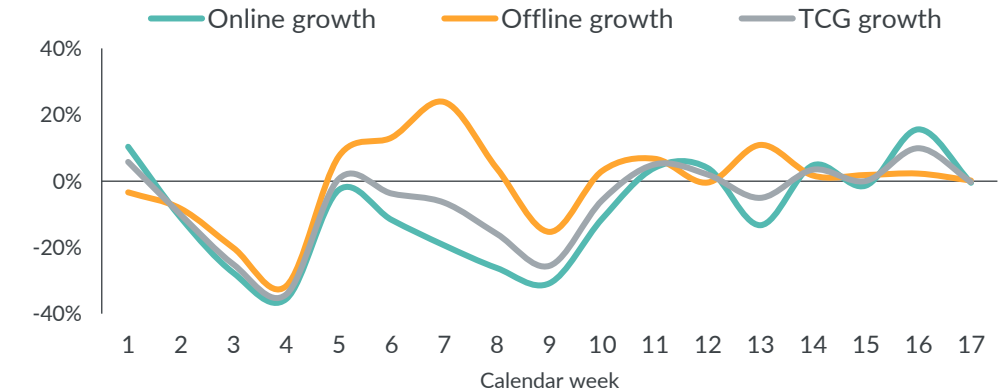


China

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 17 (Apr 24 - Apr 30)



- Flat traditional retail and a slight downswing of online sales (-1%) let to a flat total TCG market.
- Mobile PCs decelerated at -15%. Smartphones delivered a plus of 9%.
- Week 17 in 2023 saw solid decreases for TV sales (-17%), washing machines (-19%) and cooling (-16%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 17 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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