



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 156
cw20/2023

Powered by **gfknewron**

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> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

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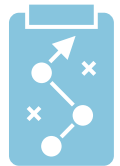
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Inflationary pressures impact spending on sustainability



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How much do you agree or disagree with this statement?

“First comes economic security and well-being, then we can worry about environmental problems”



Developing Asia:

Lack of economic security limits actions taken on sustainability

+5 pts
vs 2021



Economic security first

+4 pts
vs 2021



Eco friendly products too expensive

Agreement (top 2 box)

Economic considerations gain weight again, making sustainable behavior more difficult.

“The environmentally friendly alternatives for many of the products I use are too expensive”

Weekly retail insights from the Point of Sale

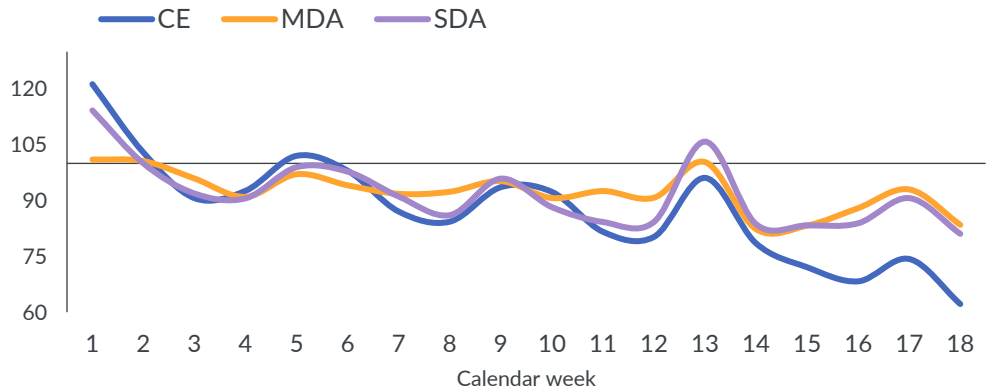
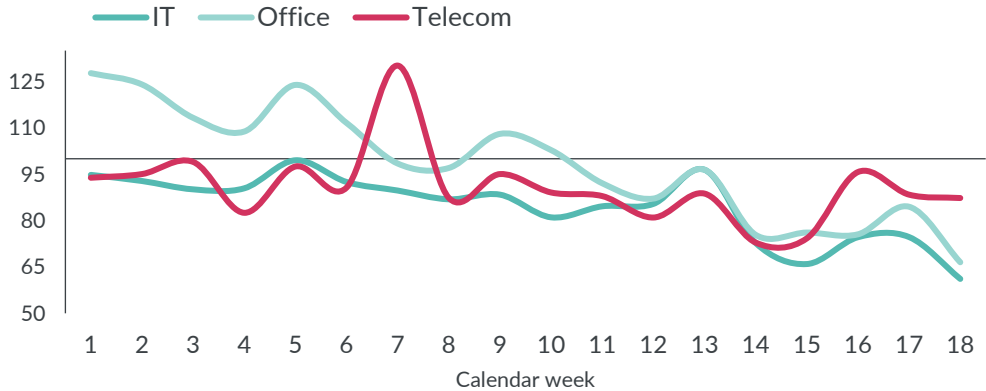
Spotlight on Germany



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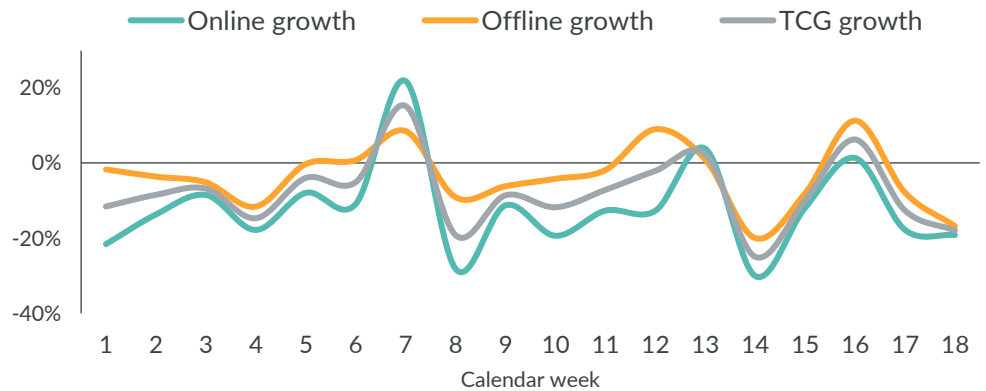
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 18 (May 01 – May 07)



- The total TCG market dropped by 18%, driven by online sales at -19%. Traditional retail added to it at -17%.
- All IT/Office products delivered strong negative trends, ranging from -19% for laser printers to -33% for media tablets. Smartphones slumped at -15%.
- While CE products also delivered double-digit declines (TVs posting -21%), some MDAs and SDAs posted slightly less negative trends with dental care and washing machines down by 7% and shavers decreasing by 6%. Air treatment was the weakest product group in week 18, posting -36%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 18 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.

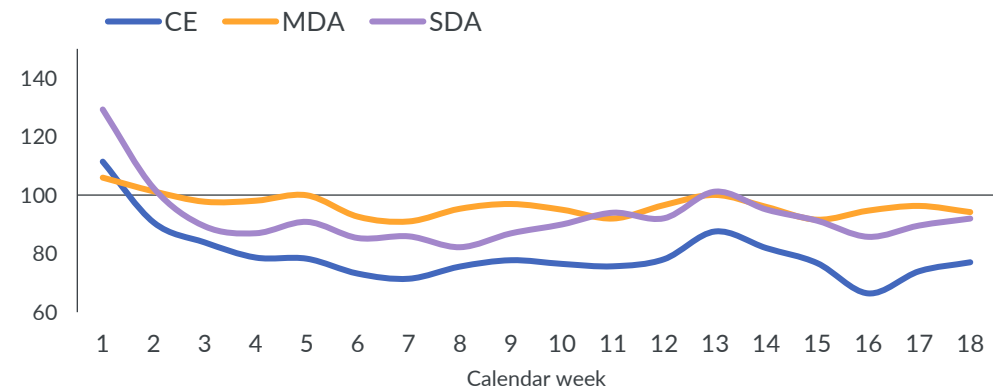
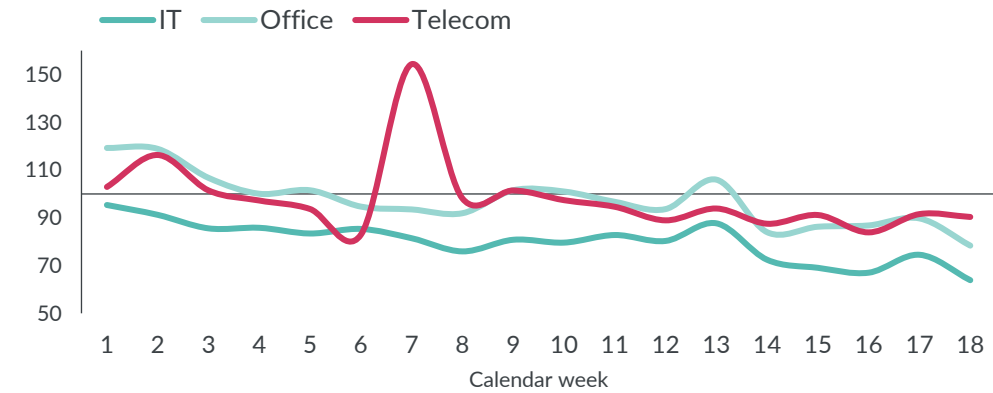
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

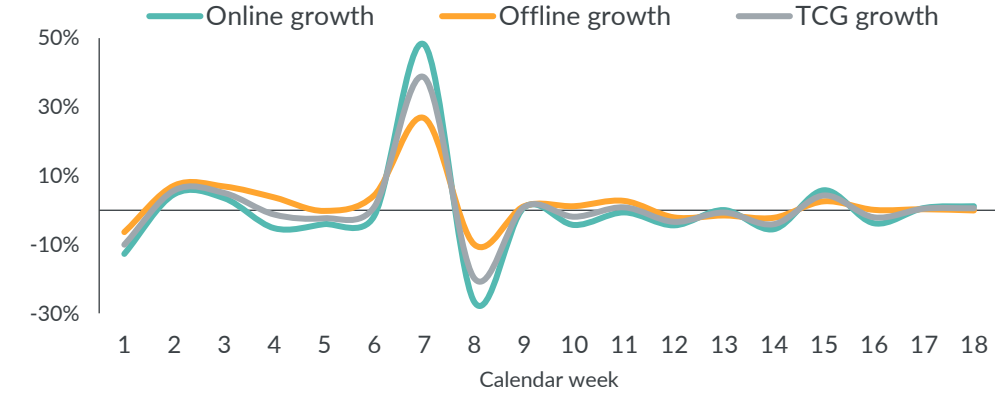


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 18 (May 01 – May 07)



- Flat traditional retail and slightly increasing online sales (+1%) led to an uptick of 1% for the total TCG market.
- There were negative trends for IT/Office products, ranging from -14% for inkjet printers to -39% for desk computing. Laser printers at -8% were the category hit least. Smartphones accelerated at +14%.
- The mixed picture for MDA/SDA/CE product groups saw vacuum cleaners in the lead at +11%. Shavers and dental care were stable compared to the same week last year. Audio home systems at -13% brought up the rear.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 18 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**

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Germany

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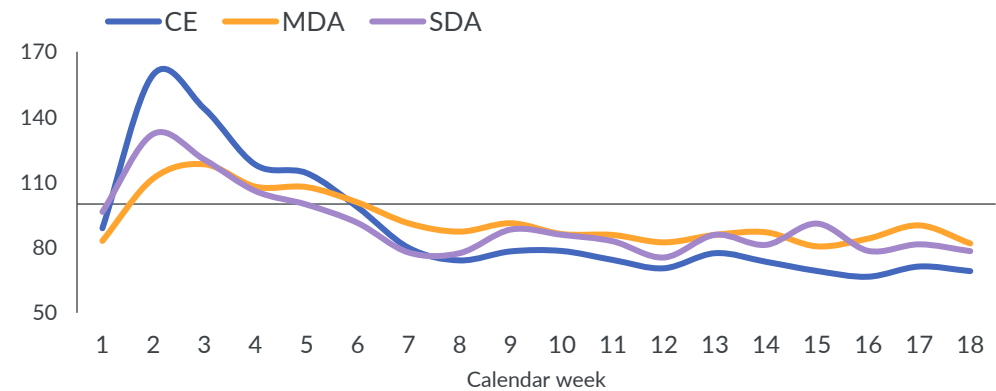
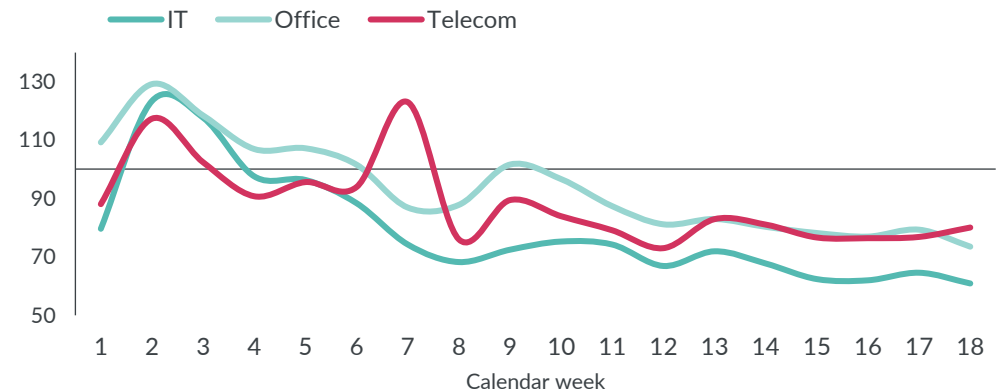
Russia

Japan

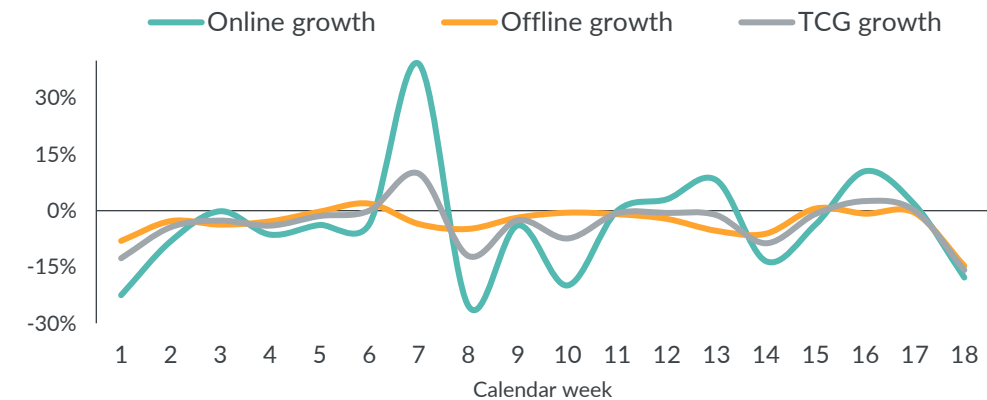
Brazil

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 18 (May 01 – May 07)



- Labor Day on Monday, May 1st, impacted sales in week 18. Online sales dropped by 18% and traditional retail fell by 15%. This caused a downswing of the total TCG market of -16% versus the same week in 2022.
- IT/Office products posted negative trends, ranging from -16% for inkjet printers to -45% for desk computing. While smartphones slumped at -16%, headsets lagged at -9%.
- Within MDA/SDA/CE products, only air treatment saw a positive development and won 9%. Washing machines were down 5%, dental care and soundbars decreased by 7%, all others were double-digit negative.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 18 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**

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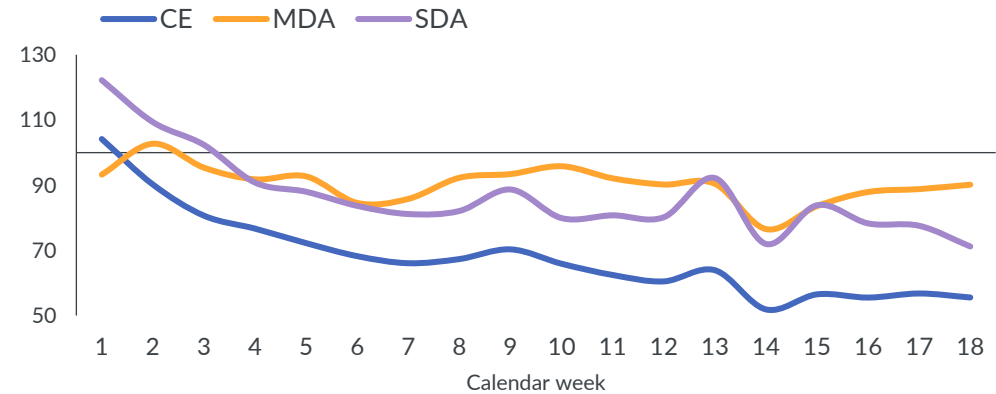
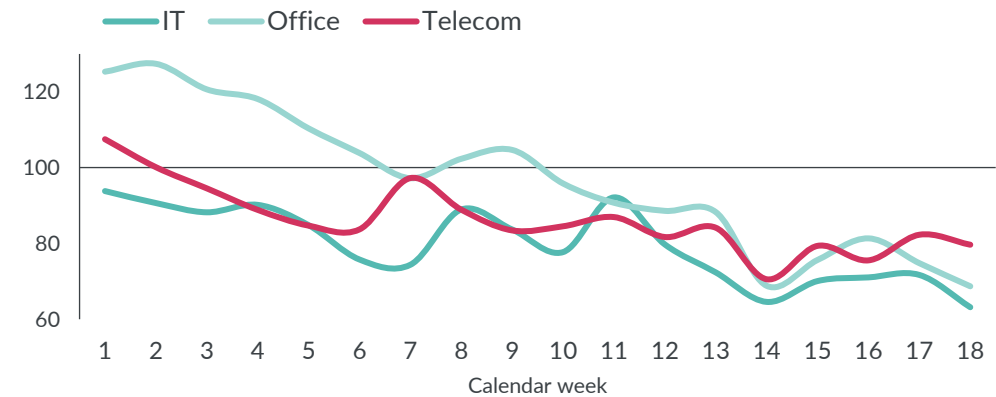
Russia

Japan

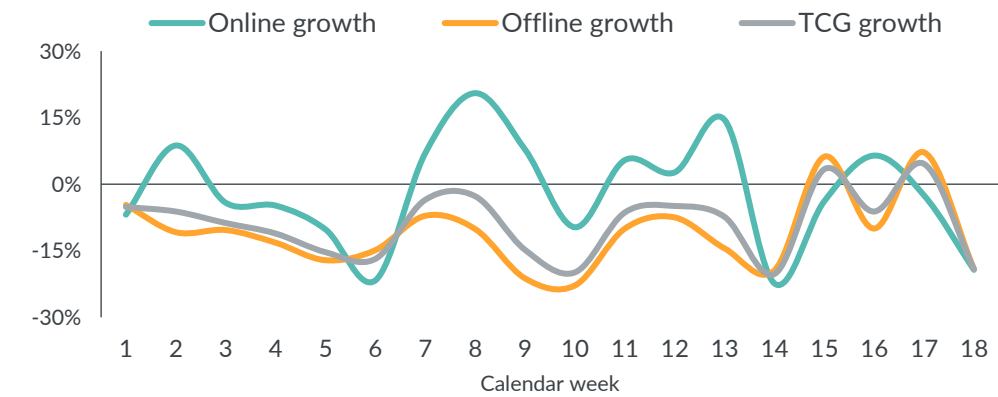
Brazil

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 18 (May 01 – May 07)



- At an identical rate of -19%, traditional retail and online sales retail dragged the total TCG market down by -19% during Labor Day.
- Except for laser printers close to -10%, all other IT/Office products decreased in clear double digits, led by desk computing at -34%. Smartphones lagged at -12%.
- While cooling and washing machines gained 2% and 0.2% respectively, all SDA categories lost in solid double digits, ranging from -14% for air treatment to -25% for vacuum cleaners and dental care. CE products plummeted by more than 30%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 18 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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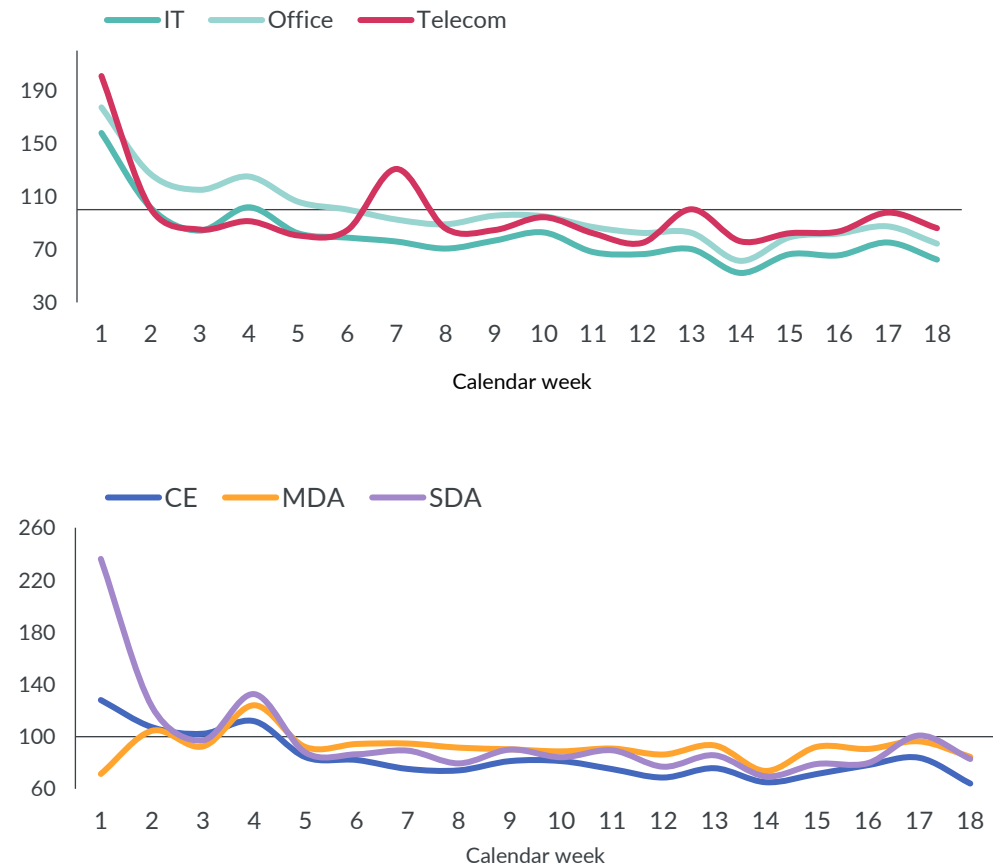
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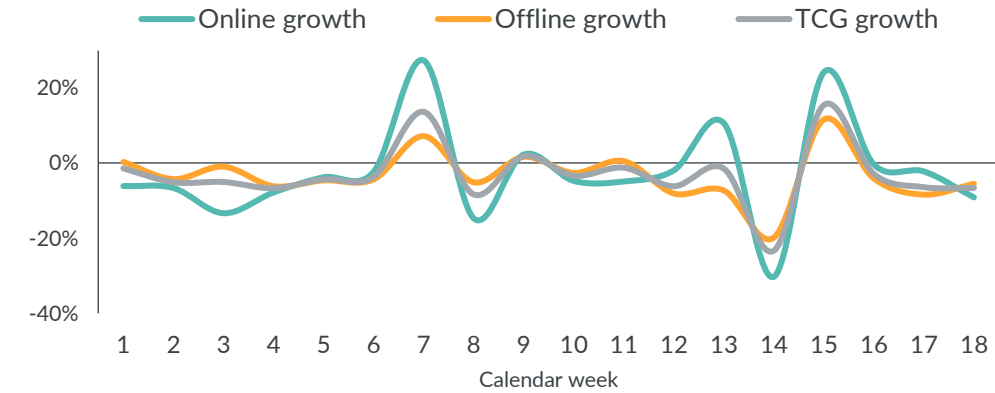
Brazil

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 18 (May 01 – May 07)



- Traditional retail experienced a minus of 6% versus week 18 in 2022 and online sales were down by -9%, resulting in a downswing of the total TCG market of 7%.
- Desk computing (-29%) was the worst-performing product group among IT/Office products. Mobile computing slumped at -20%. Printers were single-digit negative. Smartphones increased by 3%.
- MDA and CE products posted an overall negative picture with TV sales down by 20%. Cooling was flat. Vacuum cleaners and hot beverage makers accelerated at 12%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 18 2023 (no comparability with 2019); 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, 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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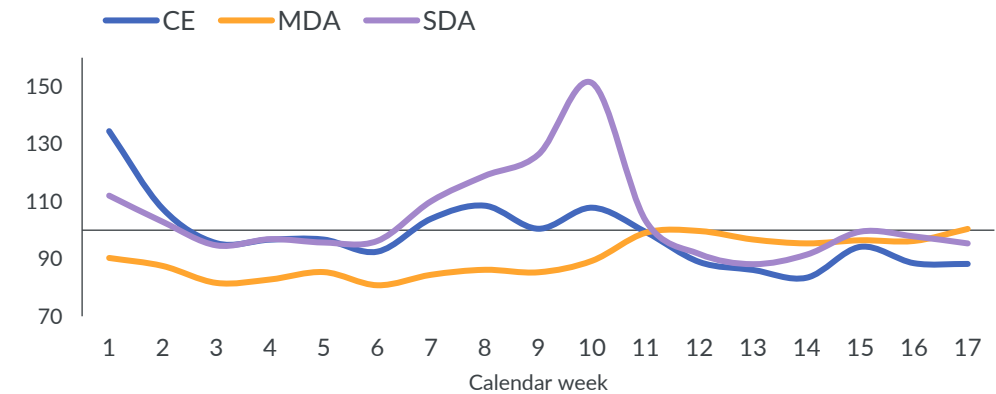
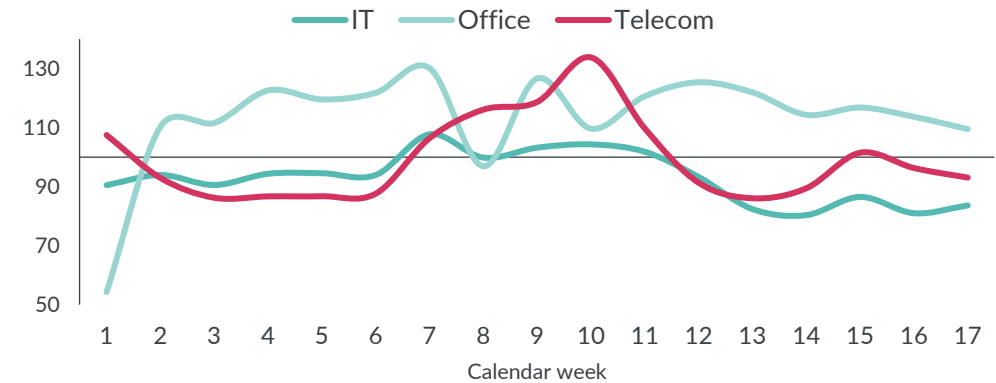
> **Russia**

Japan

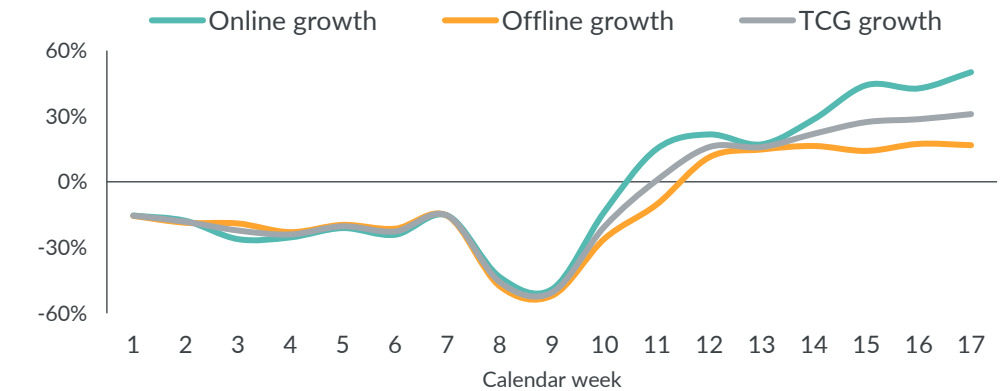
Brazil

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 18 (May 01 – May 07)



- The Russian TCG market continued its recovery, delivering +35% versus week 18 in 2022. Online sales at +56% were the driving force and traditional retail added to it at +21%.
- Laser and inkjet printers both accelerated by 57% and the other IT/Office categories increased by around 30%. Desk computing was weak at +4%. Smartphones witnessed an upswing of 33%.
- Cooling and washing machines delivered +40% and +48% respectively. SDAs were weaker, with shavers posting +2% and dental care down by 4%. TVs gained 47% while audio home systems grew by +107%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 18 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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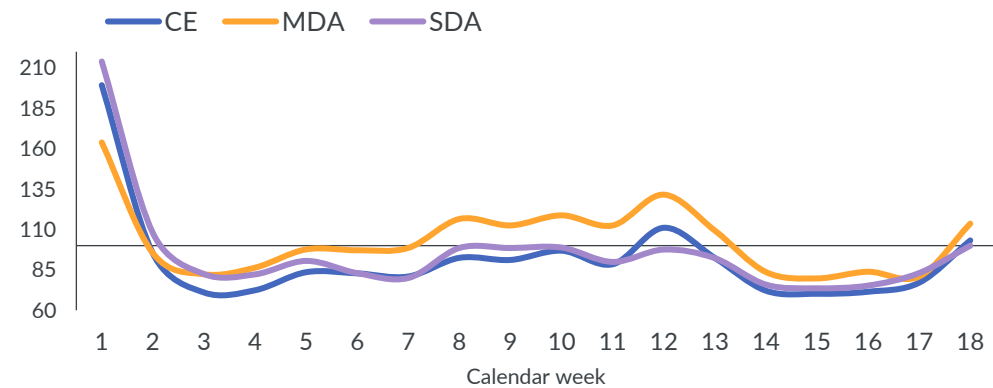
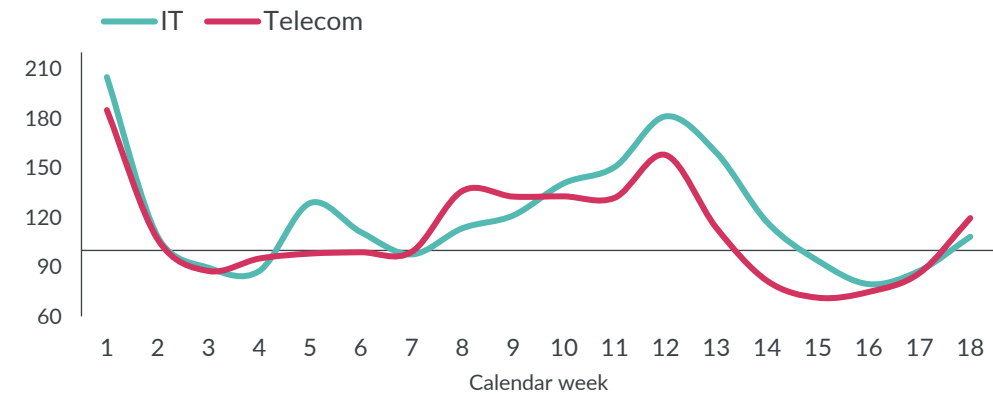
Russia

➤ Japan

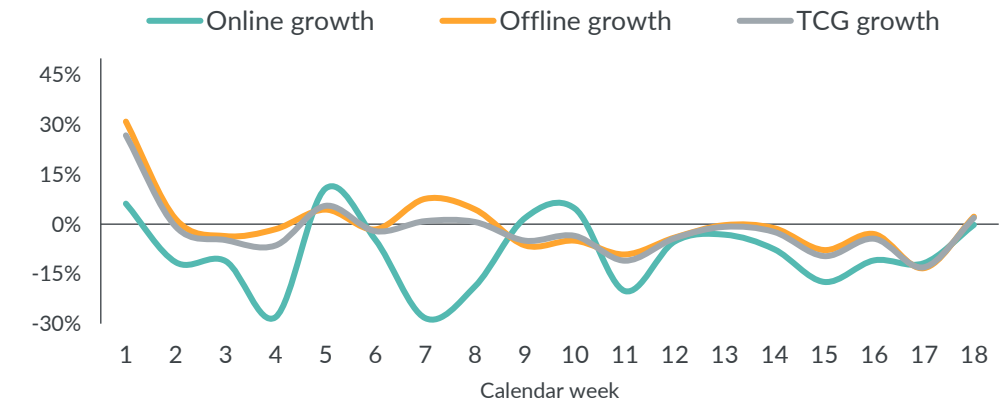
Brazil

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 18 (May 01 – May 07)



- Online sales recovered from -12% in week 17 and were flat in week 18. Combined with recovered traditional retail at +2%, this increased the total TCG market by 2%.
- Smartphones returned to growth, delivering +12% (up from -11%). Headsets increased by 18%. Mobile computing posted -7%.
- While MDAs were positive with cooling at +2% and washing machines at +5%, SDA categories were slightly negative except for dental care at +13% and flat hot beverage makers. While soundbars were up 17%, TV sales lagged at -9%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 18 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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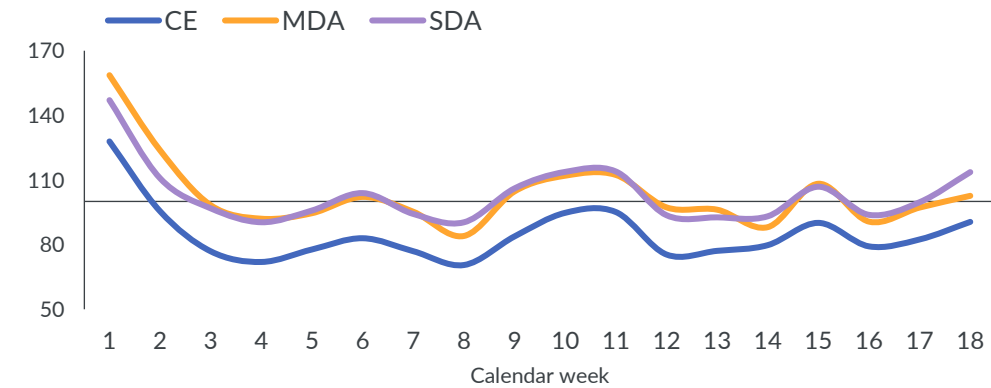
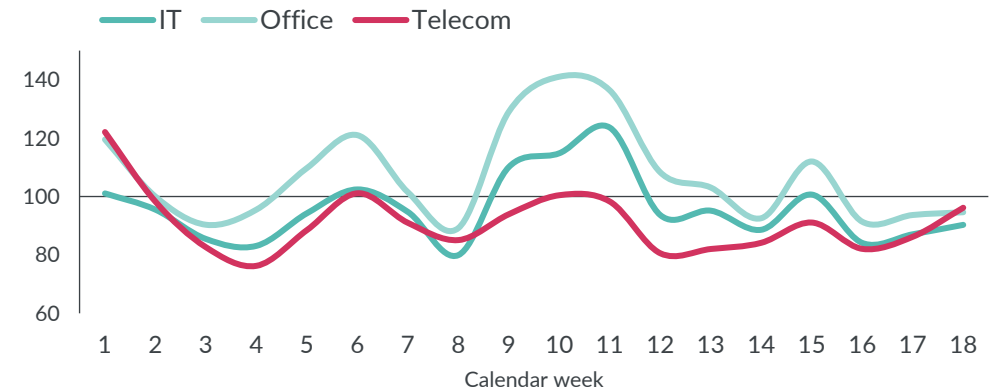
Russia

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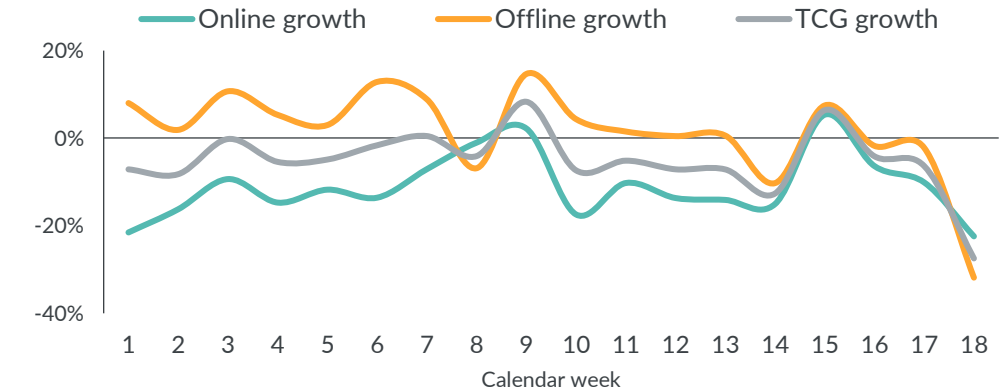
➤ Brazil

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 18 (May 01 – May 07)



- Strong declines for traditional retail (-32%) and online sales (-22%) led the total TCG market to plummet by 27%.
- Among the negative rates for IT/Office products, laser printers at +22% and media tablets at +13% offered rays of light. Smartphones slumped at -36%.
- MDA/SDA/CE product groups delivered double-digit losses with food preparation in the lead at -36%. The exceptions were vacuum cleaners at -5% and shavers with a plus of 8%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 18 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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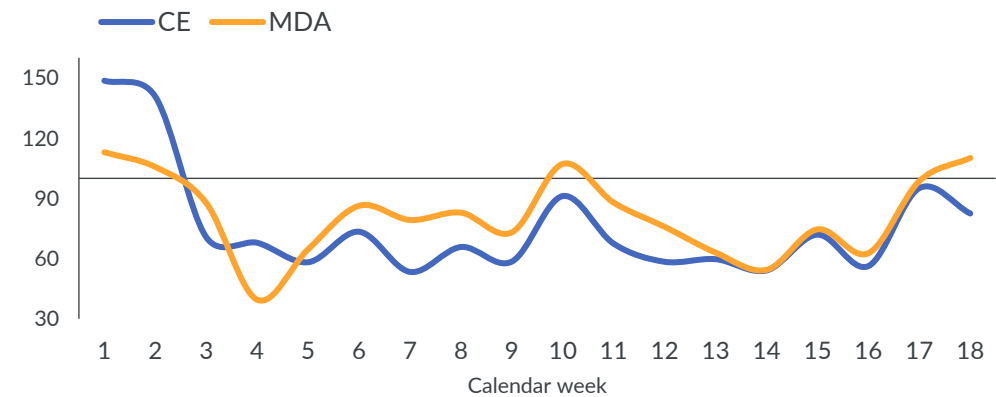
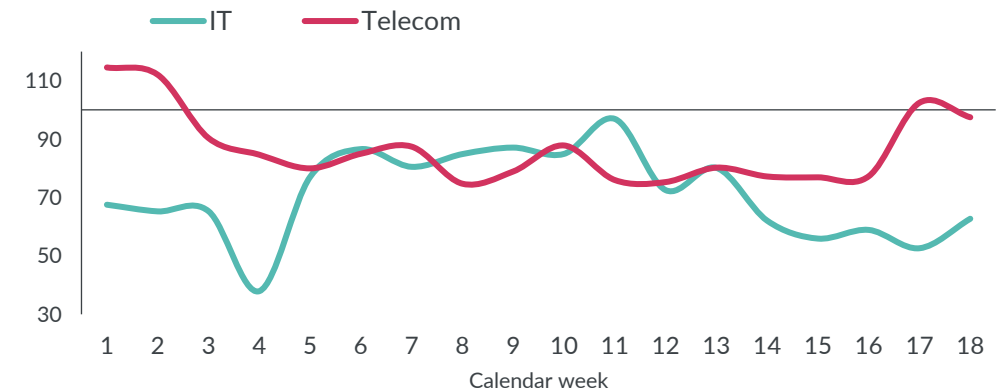
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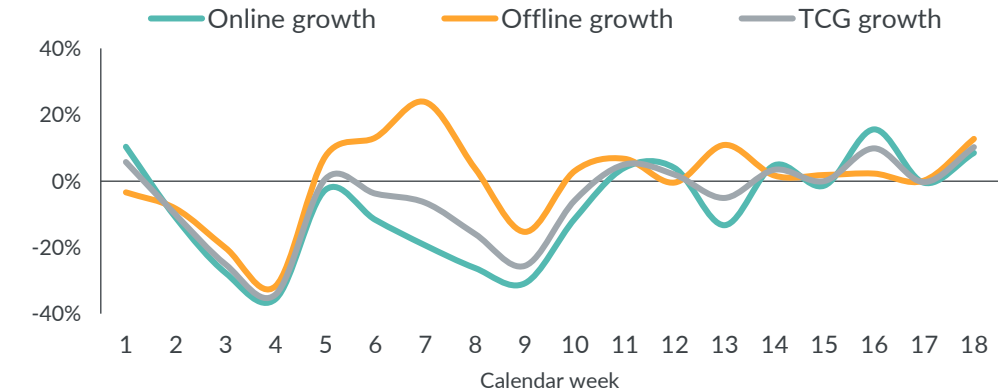


China

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 18 (May 01 – May 07)



- The strong recovery of traditional retail at +13% (flat in the previous week) led to an upswing for total TCG of 10%. Online sales at +8% (up from -1% in week 17) added to it.
- The driving force for this development was smartphones, accelerating at +21%. Mobile PCs delivered a slight minus of 3%.
- Week 18 in 2023 saw single-digit declines for TV sales (-5%), washing machines (-8%) and cooling (-7%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 18 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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