



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 157

cw21/2023

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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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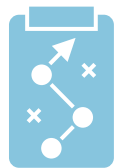
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Fact of the Week

IT/Office Markets in Europe: Consumer demand drops sharply while business performs better across all categories



About **gfknewron**

Europe | Sales value growth (USD) 2022 vs 2021 resp. 2021 vs 2019 | Jan 22 - Dec 22

> Fact of the week

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Great Britain

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Italy

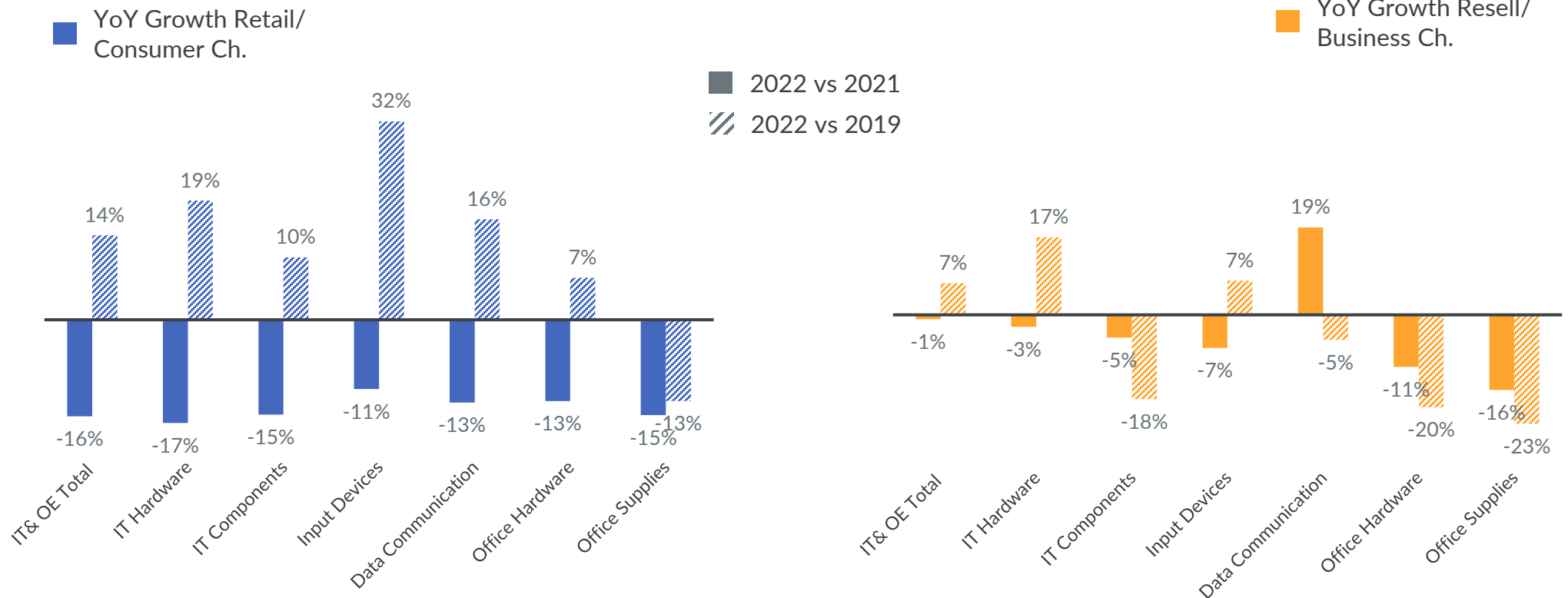
Spain

Russia

Japan

Brazil

China



Source: GfK Market Intelligence; Retail and Reseller Markets in Europe; IT & Office categories; revenue in USD (NSP) in Mio. USD; multimedia devices are part of total IT&OE, but no separate growth rates included; Office hardware and supplies are based on business vs. consumer channels, all other categories on retailers vs. resellers

Weekly retail insights from the Point of Sale

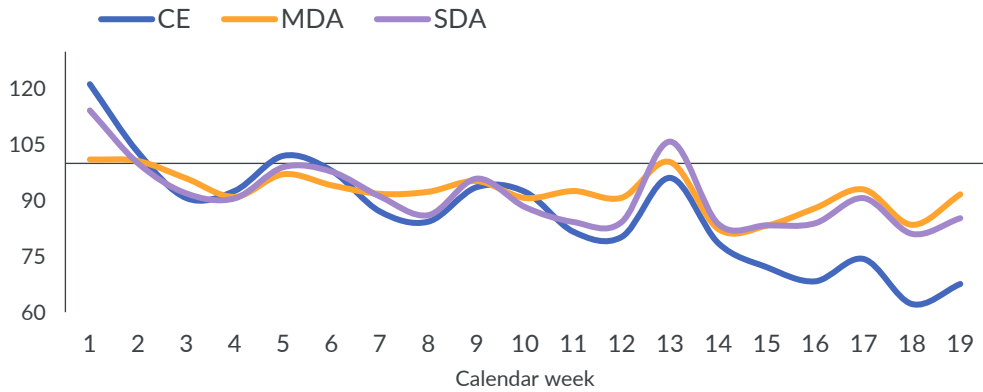
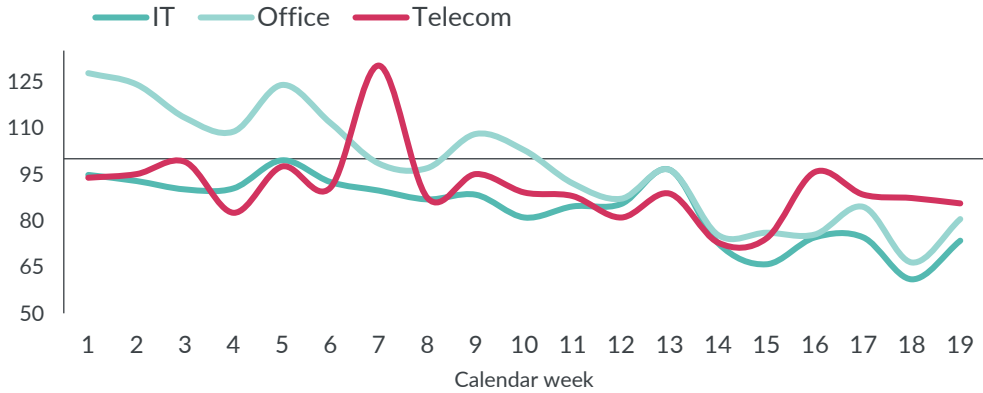
Spotlight on Germany



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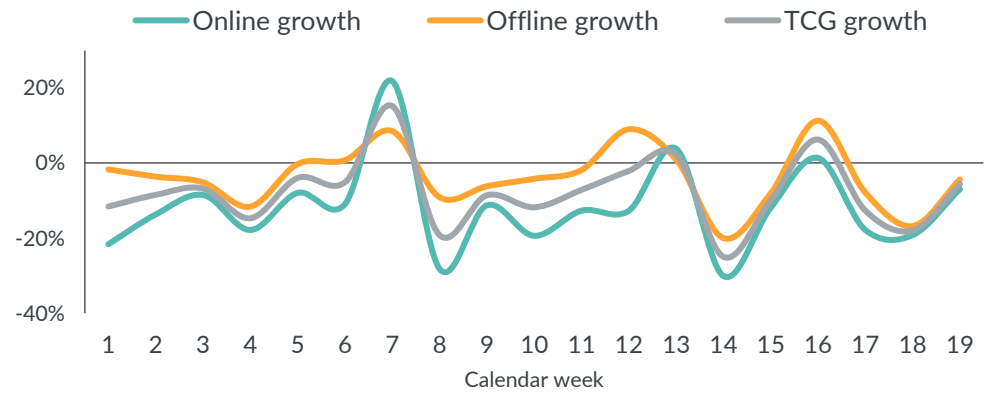
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 19 (May 08 – May 14)



- The total TCG market dropped by 6%, driven by online sales at -7%. Traditional retail added to it at -4%.
- The mixed picture for IT/Office products saw laser printers in the lead at +29% and mobile computing bringing up the rear at -15%. Desk computing was flat. Smartphones slumped at -11%.
- CE products decelerated, with TVs posting -3%. The overall positive trends for SDA categories were clouded by air treatment posting a big decline of 48%. Food preparation was out in front at +22%, washing machines were positive at +6%. Cooling declined by 9%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 19 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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Fact of the week

Germany

➤ Great Britain

France

Italy

Spain

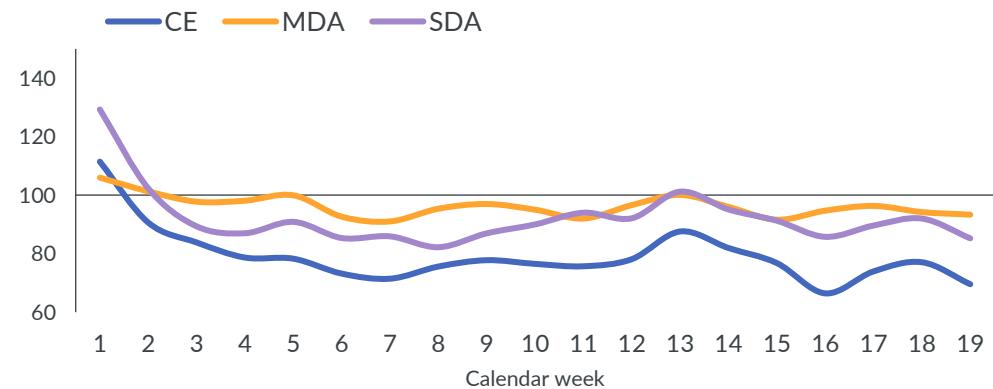
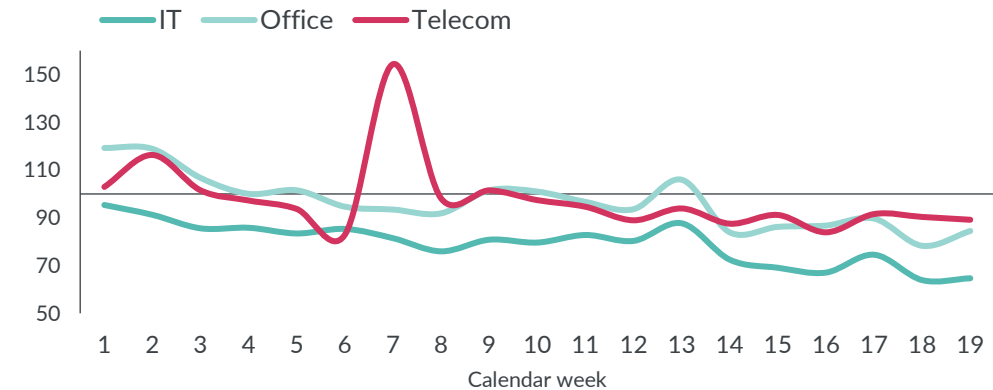
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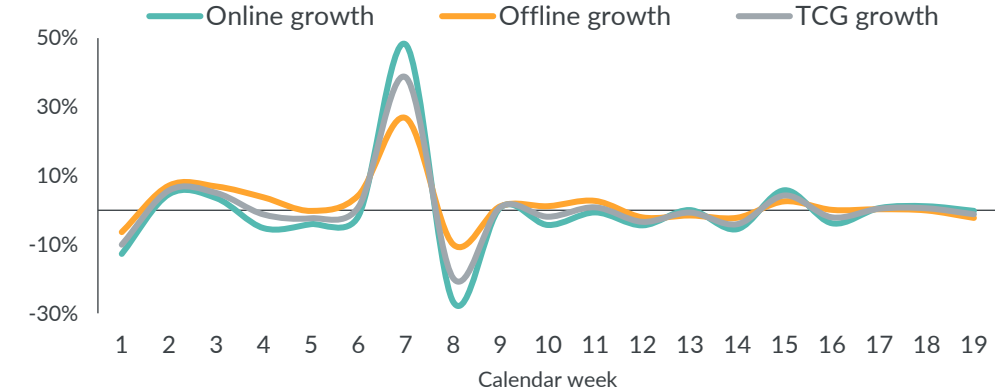
Brazil

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 19 (May 08 – May 14)



- Flat online sales and slightly decreasing traditional retail (-2%) led to a downswing of 1% for the total TCG market.
- There were negative trends for IT/Office products throughout, ranging from -7% for mice and keyboards to -28% for desk computing. Smartphones accelerated at +7% while headsets were flat.
- The mixed picture for MDA/SDA product groups saw dental care in the lead at +11%. Shavers and cooling were negative at -8% and -3% respectively. Soundbars won 13% while TV sales lost 8% and audio home systems plummeted by 31%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 19 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

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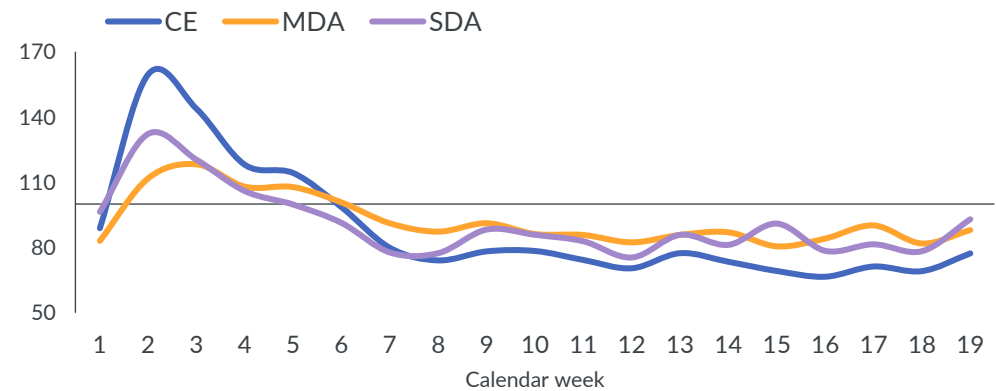
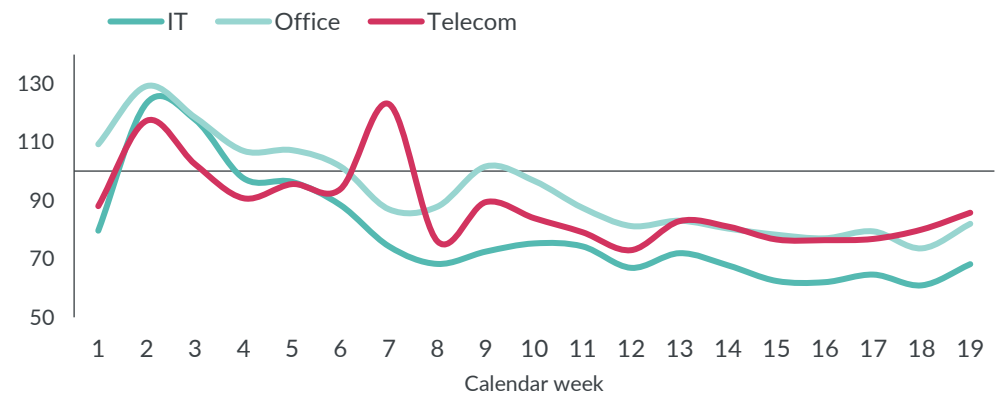
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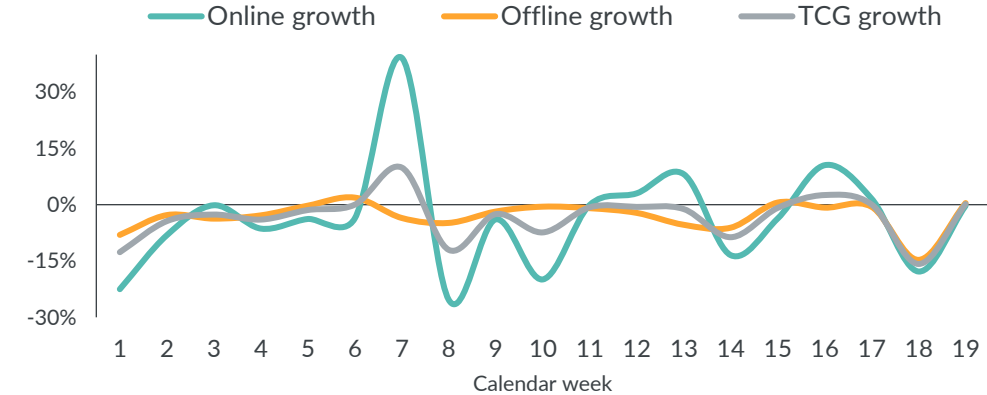
Brazil

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 19 (May 08 – May 14)



- Flat traditional retail and online sales led to a flat total TCG market: all three showed zero percent of growth.
- IT/Office products posted a mixed picture, ranging from +7% for mice and inkjet printers to -27% for desk computing. While headsets accelerated at +14%, smartphones were weak at +3%.
- MDA and SDA products posted mostly negative trends with some bright spots for vacuum cleaners (+15%) and hot beverage makers (+10%). While soundbars experienced a good plus of 21%, TVs were weaker at +5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 19 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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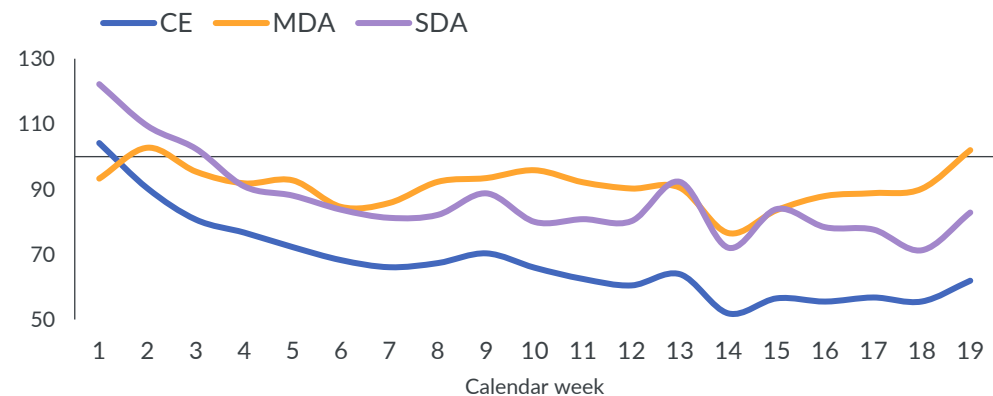
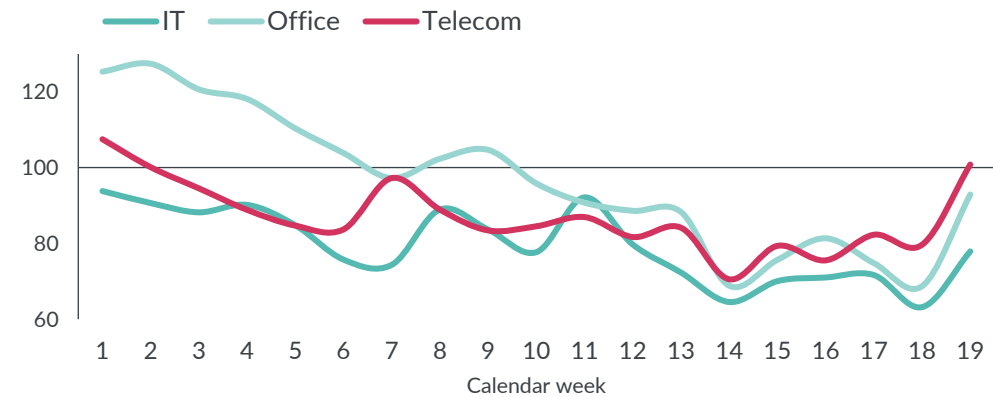
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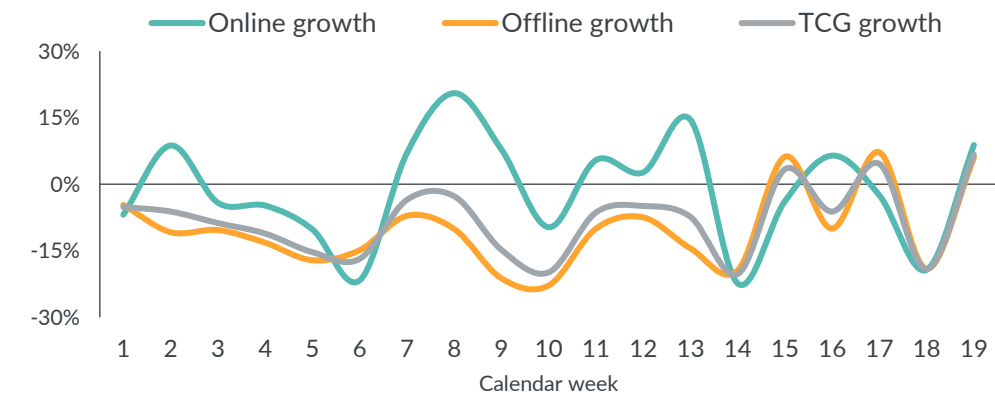
Brazil

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 19 (May 08 – May 14)



- There was a good recovery of both distribution types, online sales at +9% and traditional retail at +6%, delivering upswing of 7% for total TCG.
- This was driven by smartphones at +21% but also the small product group of laser printers accelerated at a high growth rate (+39%).
- While CE products delivered negative trends (TVs posting -19% and audio home systems -12%), MDA and SDA products experienced growth, ranging from a slight +1% for shavers to +25% for food preparation and hot beverage makers. Only air treatment was down - by 3%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 19 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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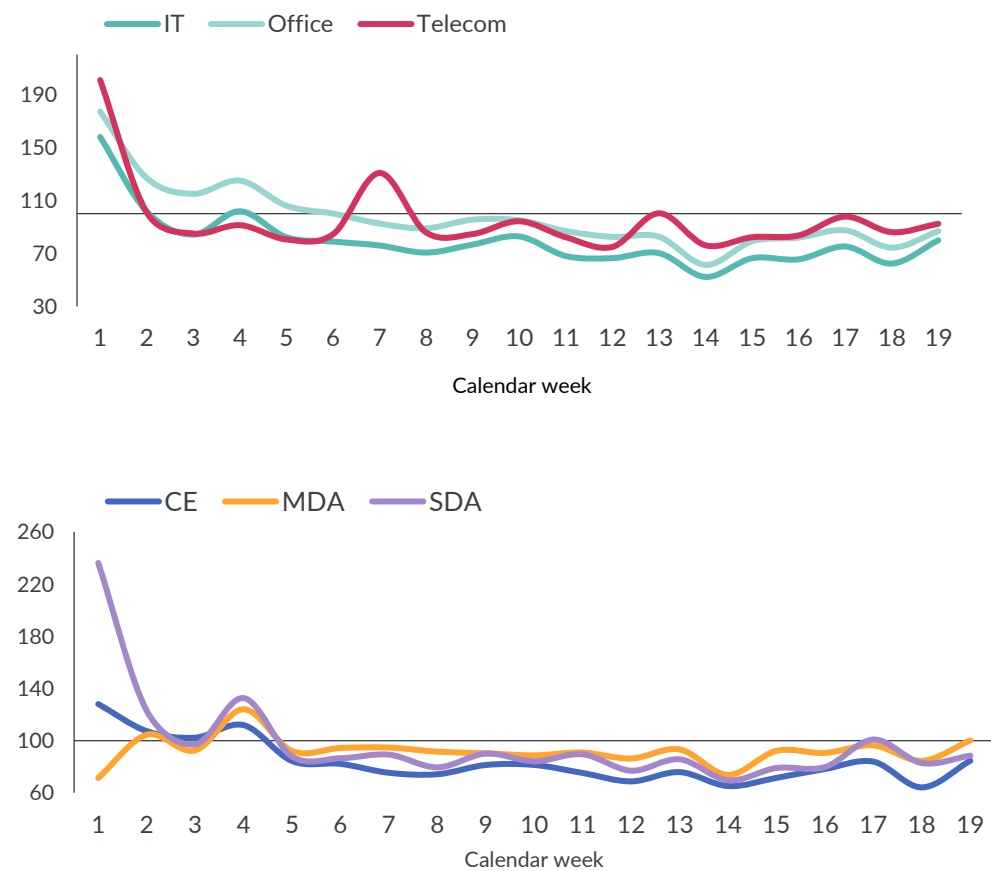
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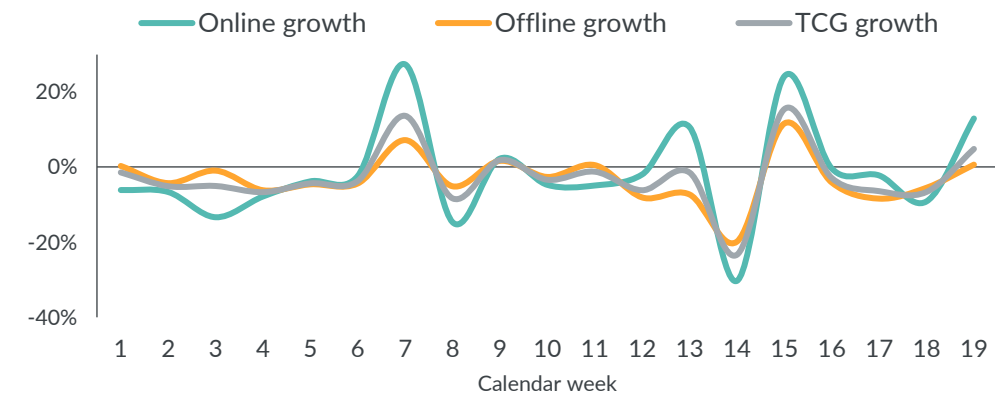
Brazil

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 19 (May 08 – May 14)



- Online sales (+13%, up from -9% in week 18) were the growth driver for the total TCG market (+5%). Traditional retail experienced a slight plus of 1%.
- Desktop computing was the only product group among IT/Office with a negative trend at -6%. Laser printers delivered +11%. Telecom products posted solid double-digit rates: smartphones and headsets were up 18% and 14% respectively.
- MDA/SDA products delivered a mixed picture with hot beverage makers in the lead at +25% and shavers bringing up the rear at -12%. CE products were negative throughout, with audio home systems posting -18%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 19 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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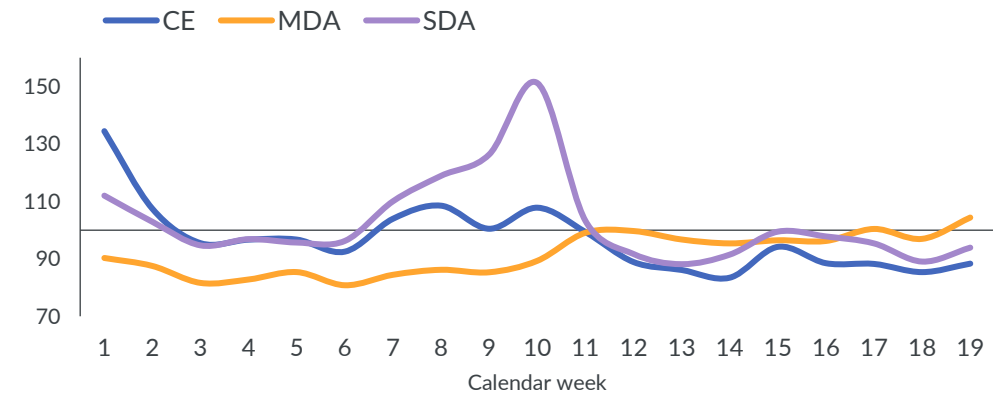
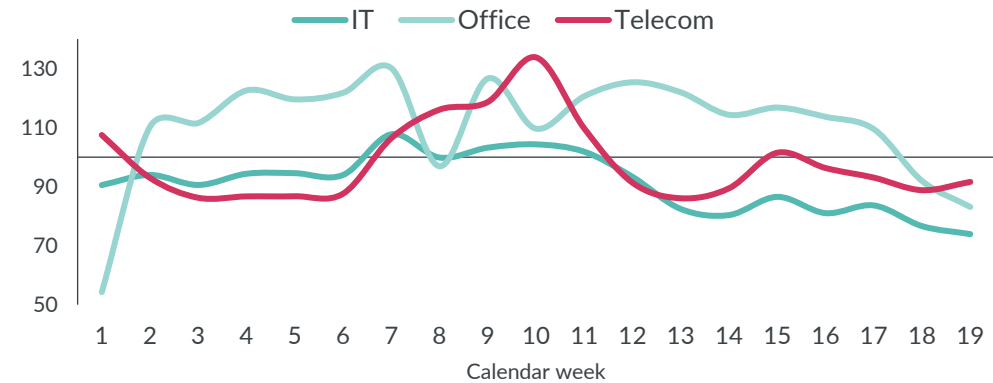
> Russia

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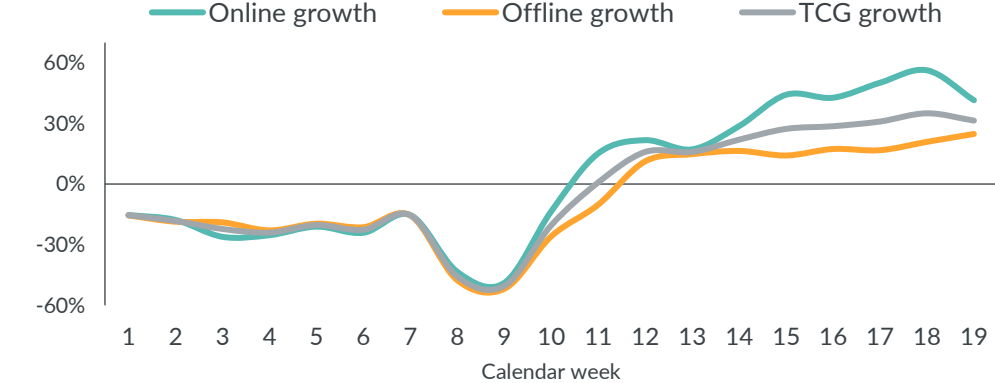
Brazil

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 19 (May 08 – May 14)



- The Russian TCG market continued its recovery, delivering +31% versus week 19 in 2022. Online sales at +41% were the driving force and traditional retail added to it at +25%.
- Inkjet printers accelerated by 52% with laser printers and media tablets up 44% and 40% respectively. The other IT/Office categories increased by more than 20%. Smartphones witnessed an upswing of 28%.
- Cooling and washing machines delivered +47% and +51% respectively. SDAs were slightly weaker, with vacuum cleaners posting +41% and dental care down by 7%. TVs gained 46% while audio home systems grew by +93%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 19 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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Fact of the week

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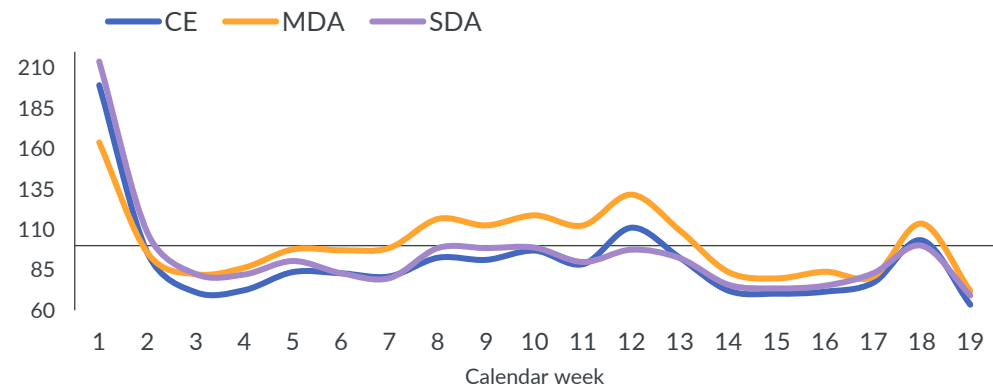
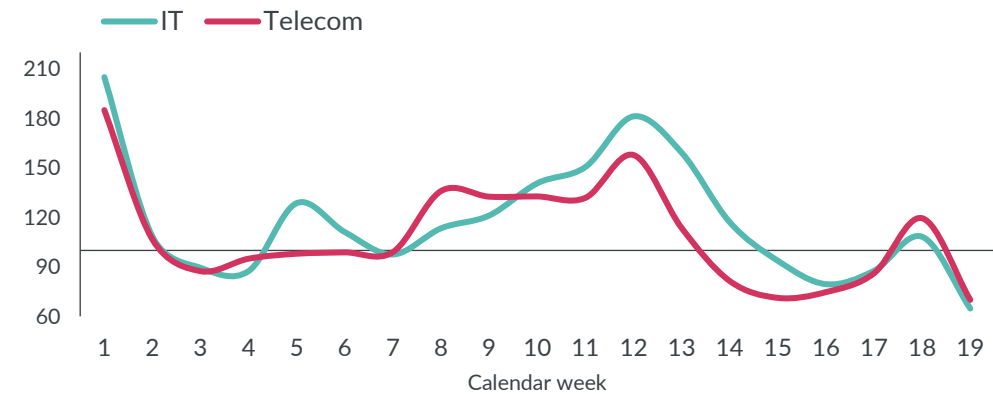
Russia

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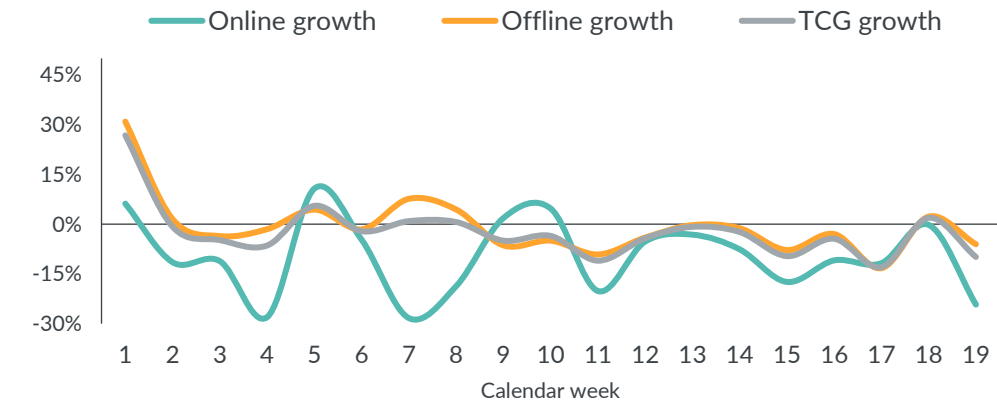
Brazil

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 19 (May 08 – May 14)



- The sharp drop of online sales (-24%) combined with decreasing traditional retail at -6% led to a downswing of the total TCG market of 10%.
- The driver of this development was media tablets at -28%. Mobile computing posted -9%. Smartphones delivered +5%.
- CE and MDA products witnessed double-digit negative trends except for washing machines at -9%. SDA categories on the other hand delivered a mixed picture ranging from -47% for air treatment to +21% for dental care.

Weekly retail insights from the Point of Sale

Spotlight on Brazil



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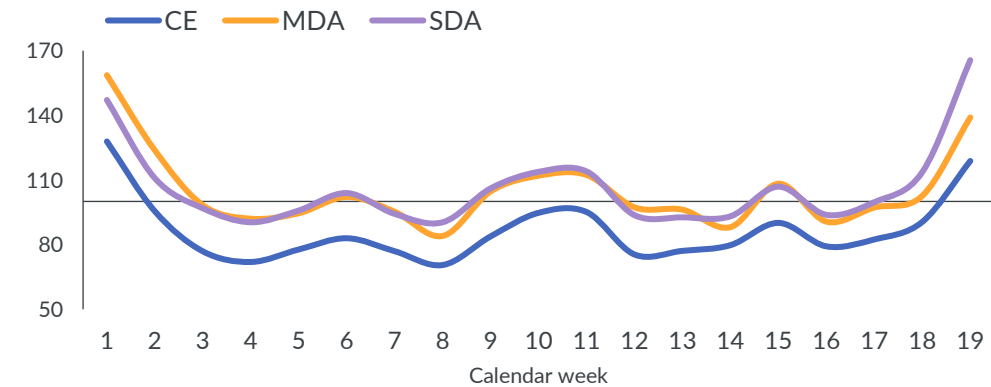
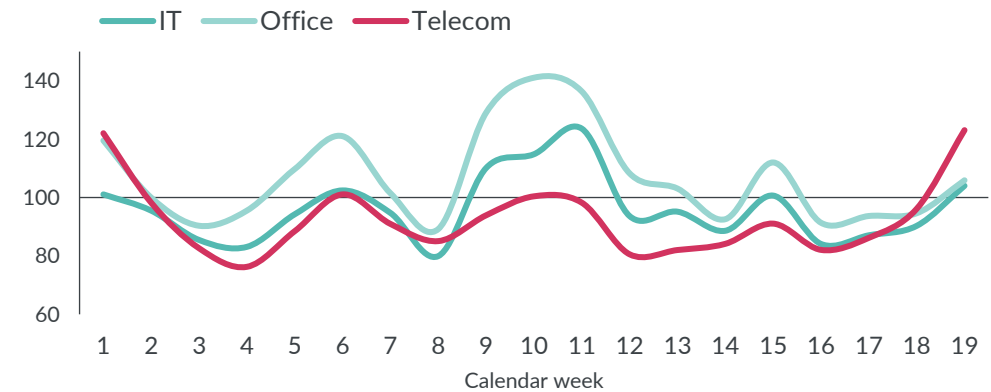
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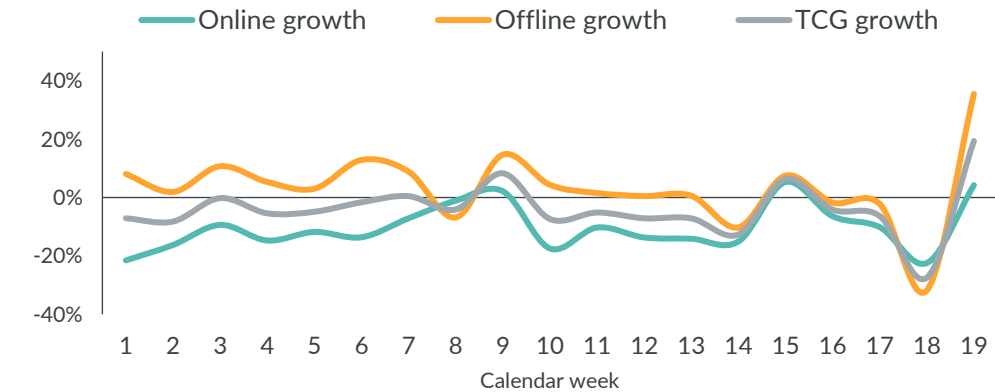
➤ Brazil

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 19 (May 08 – May 14)



- A strong uplift for traditional retail (+35% compared to -32% in week 18) led to a plus of 19% for the total TCG market. Online sales at +4% added to it.
- The rates for IT/Office products ranged from -14% for desk computing to +32% for media tablets. Smartphones accelerated at +16%.
- All MDA, SDA, and CE product groups delivered double-digit growth of more than 20%, led by hot beverage makers at +92% and food preparation at +77%. TV sales experienced an uplift of 26%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 19 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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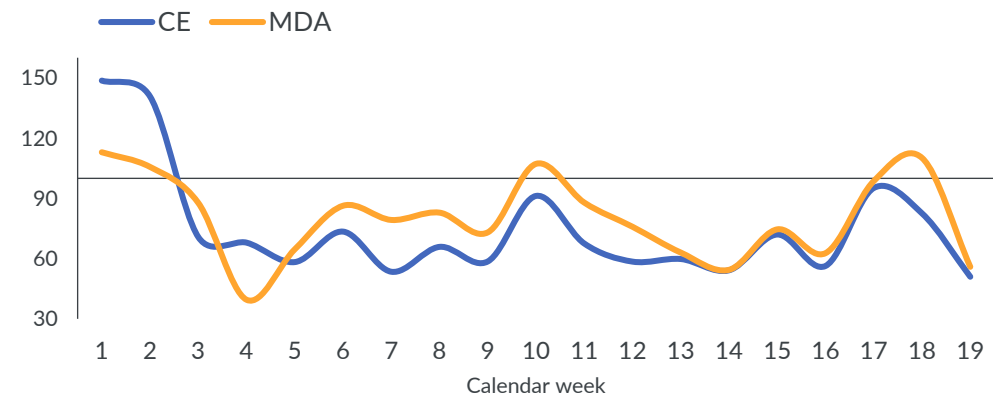
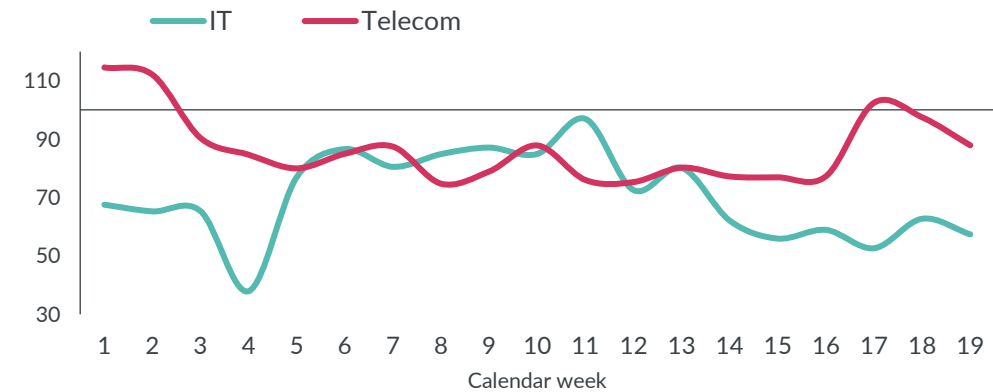
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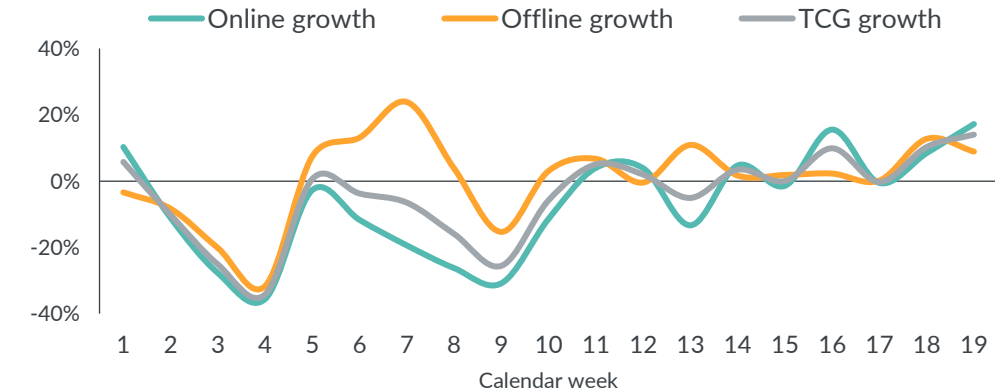


China

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 19 (May 08 – May 14)



- The positive development of online sales (+17%) led to an uplift of the total TCG market of 14%. Traditional retail added to it at +9%.
- Mobile PCs decelerated at -6%. Smartphones delivered a solid plus of 23%.
- Week 19 in 2023 delivered slight decreases for TV sales (-3%), washing machines (-3%) and cooling (-6%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 19 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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