



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 158
cw22/2023

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> About **gfknewron**

Fact of the week

Germany

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Italy

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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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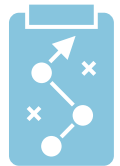
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Fact of the Week

Sustainability in TCG: Factors influencing purchase decisions vary widely by category



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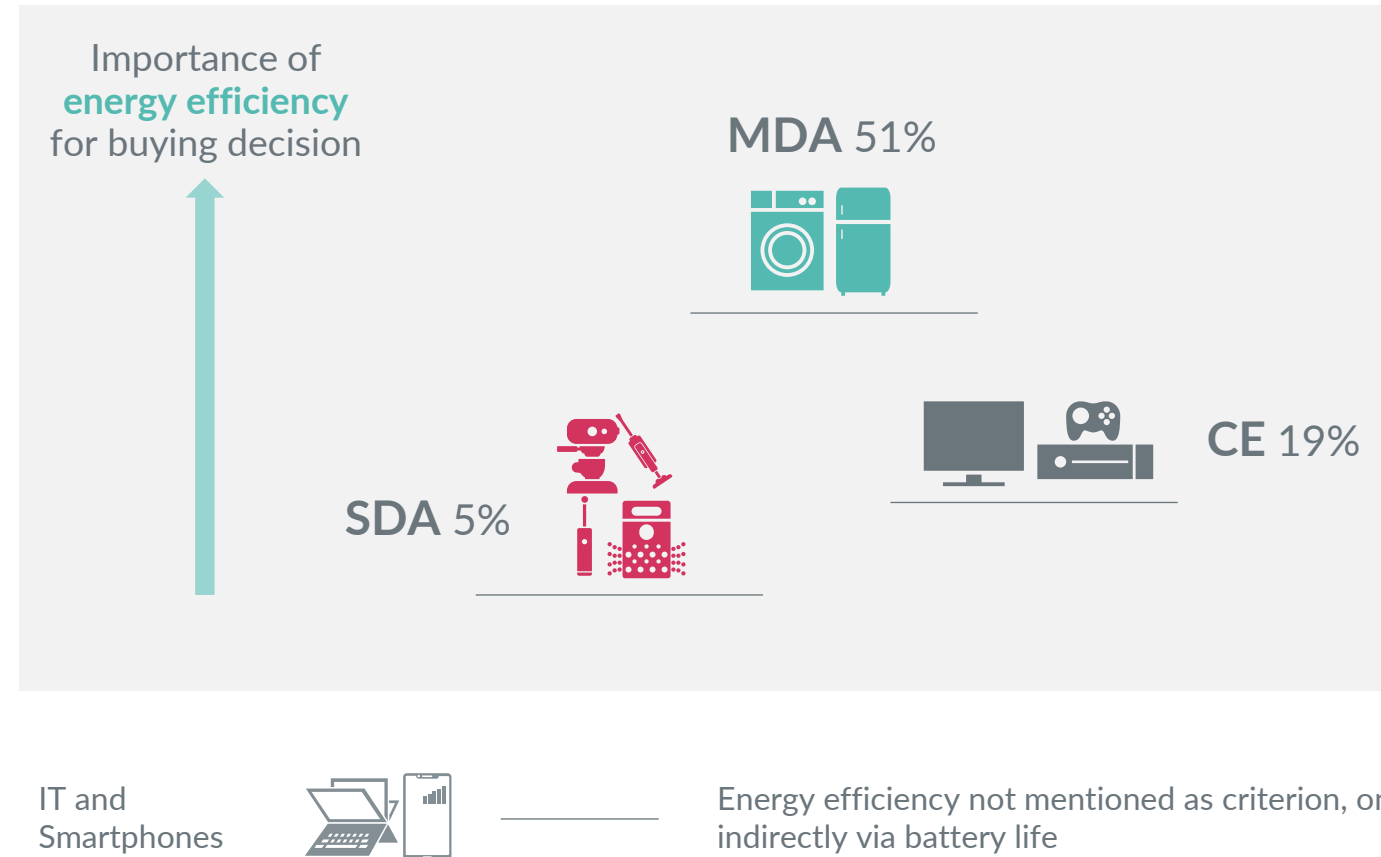
Russia

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China

Consumer decision making criteria vary widely



For these categories, historically **performance features** play a more prominent role, e.g., **CPU, RAM**, audio and picture quality as well as size and capacity

...but sustainability factors are set to become more differentiating in the future

Weekly retail insights from the Point of Sale

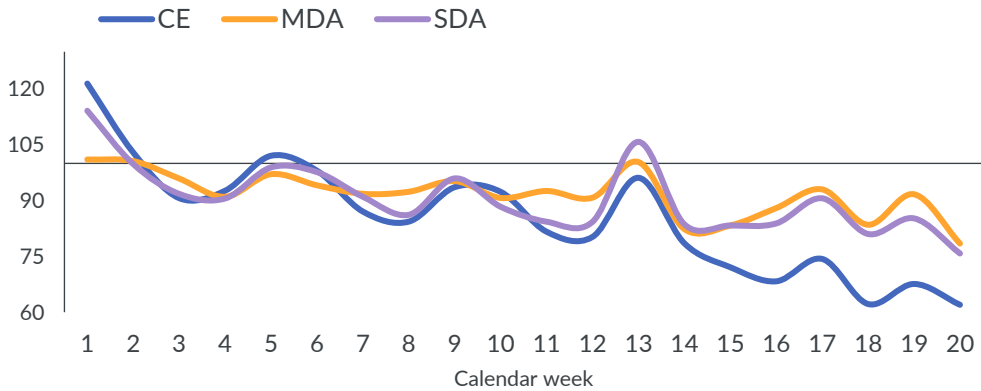
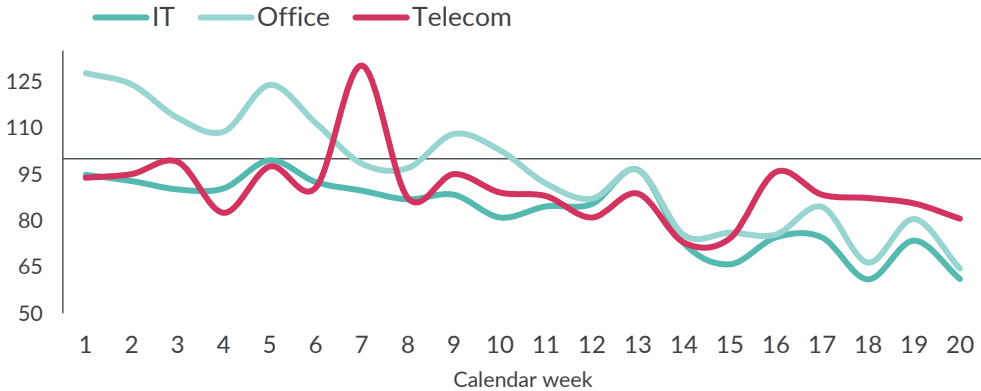
Spotlight on Germany



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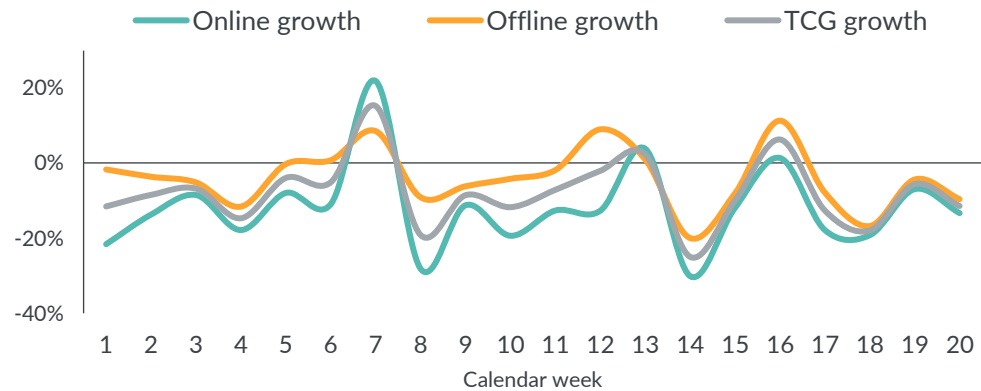
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 20 (May 15 – May 21)



- The total TCG market dropped by 11%, driven by online sales at -13%. Traditional retail added to it at -10%.
- Except for media tablets at -9%, IT products fell in double digits, led by mobile computing at -29%. Laser printers were stable at +0.5%. Smartphones decelerated at -9%.
- Only vacuum cleaners at +10% and food preparation at +1% saw growth as all other MDA/SDA/CE categories decelerated. Air treatment saw the biggest drops at -66%. TV sales declined by 10%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 20 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.

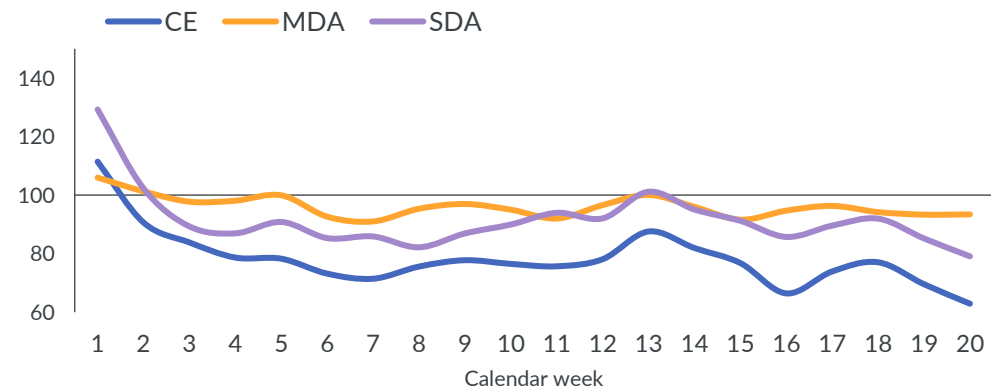
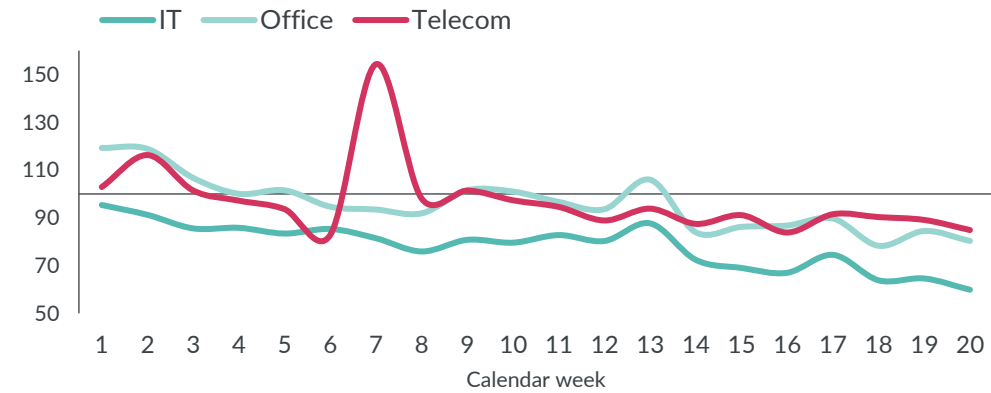
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

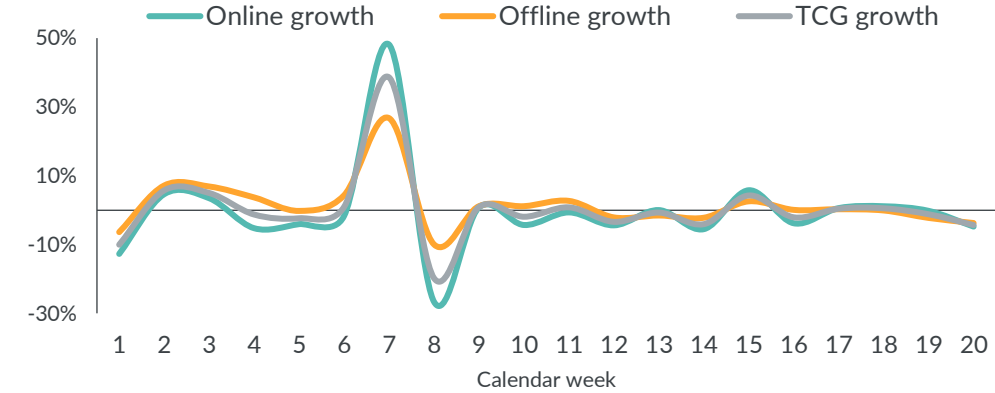


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 20 (May 15 – May 21)



- Similar rates of -4% for traditional retail and -5% for online sales dragged the total TCG market down by 4%.
- Smartphones accelerated at +7%. Laser printers were the best-performing IT product group in week 20 at +5%. Except for keying devices at -4% and mice at -3%, all other IT/Office categories lost in solid double-digits.
- CE products declined in double-digits too, with TV sales losing 17%. The mixed picture for MDA/SDA categories saw dental care in the lead (+9%). Shavers were stable compared to the same week last year.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 20 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): 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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Germany

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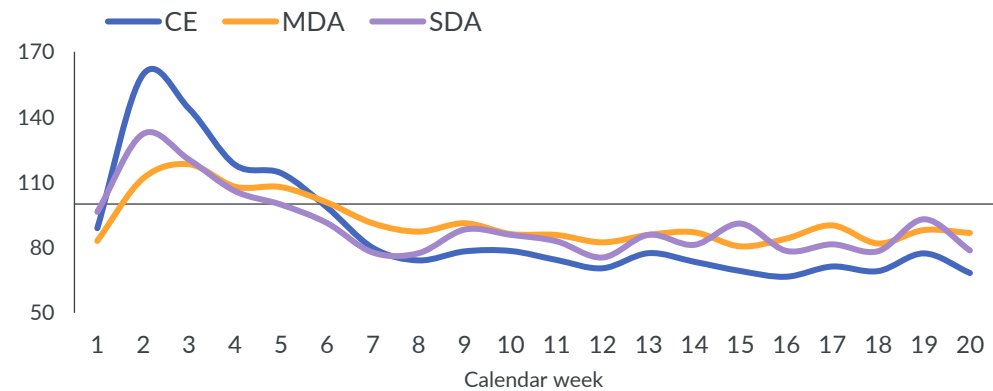
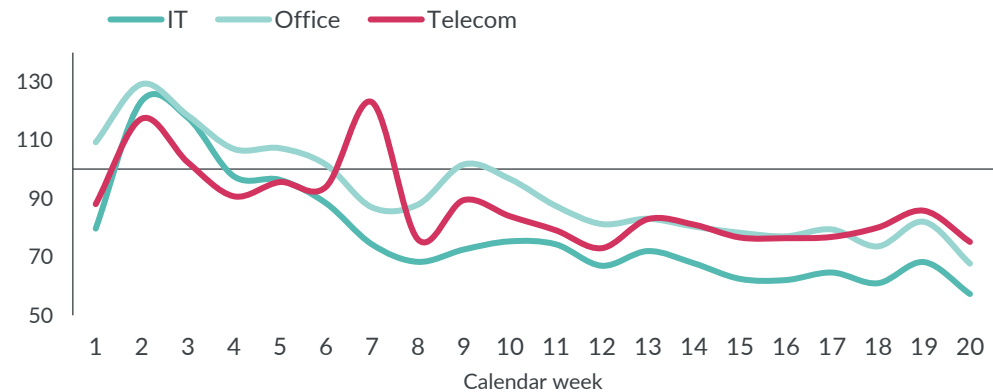
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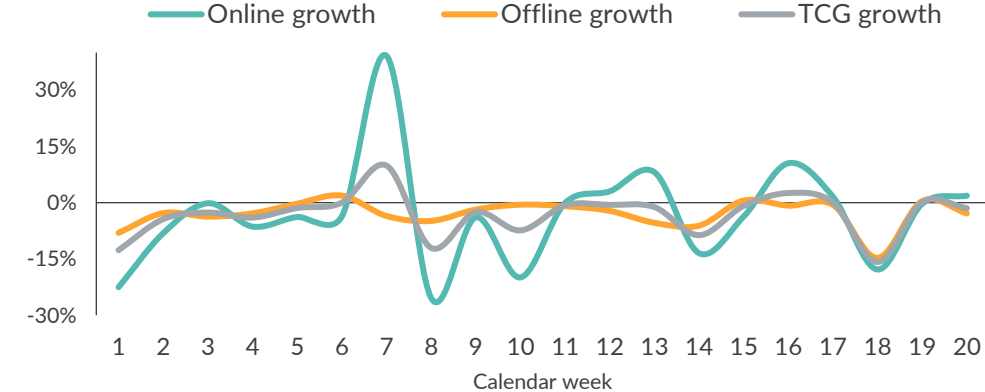
Brazil

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 20 (May 15 – May 21)



- Online sales delivered +2% (flat the previous week) and traditional retail was down -3% (also flat the previous week), resulting in a slight downswing of the total TCG market of -1%.
- IT/Office products posted a mixed picture, ranging from -25% for desk computing and -23% for media tablets to +7% for monitors. Smartphones accelerated at +4%.
- The mostly negative trends for MDA and SDA products saw air treatment as the worst-performing category at -78%. Vacuum cleaners gained 13%. TV sales were up 12%. Soundbars accelerated at +17%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 20 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



About **gfknewron**

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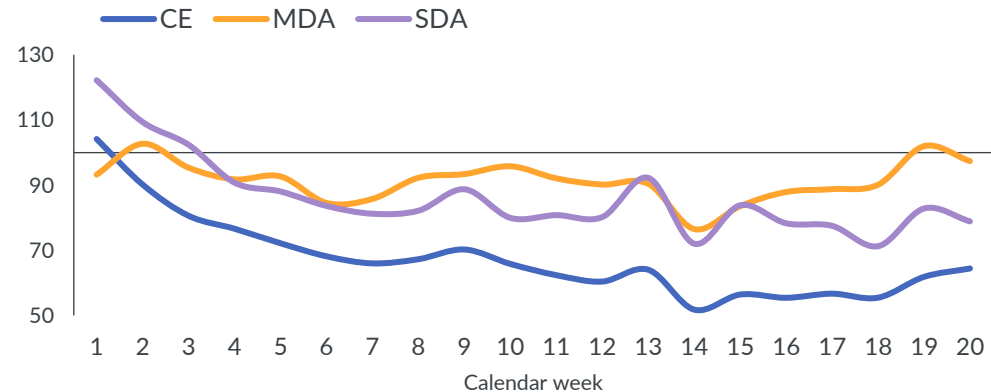
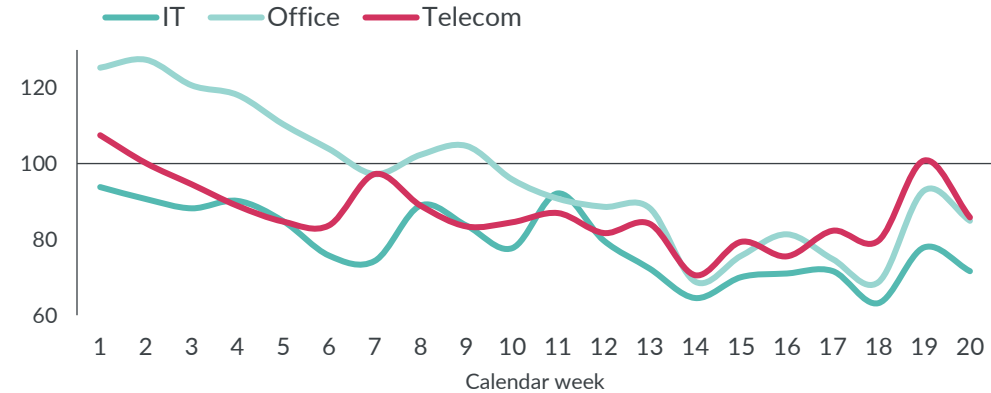
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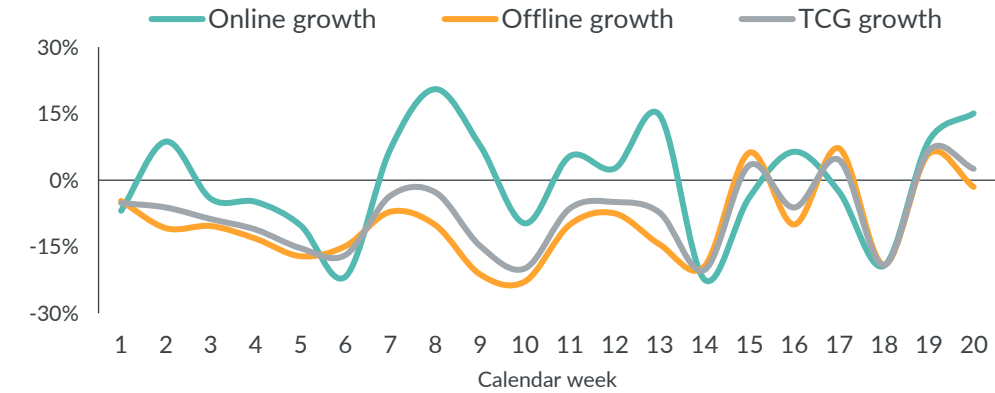
Brazil

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 20 (May 15 – May 21)



- Traditional retail dropped by 2% but online sales at +15% was able to compensate and lifted the total TCG market to a slight plus of 3%.
- This was driven by smartphones at +15% as well as the small product group of laser printers which accelerated at a high growth rate (+61%).
- Within MDA/SDA/CE products, cooling (-13%), shavers (-15%), audio home systems (-24%), TVs (-12%), and overall air treatment (-50%) delivered double-digit negative trends. Hot beverage makers were the best-performing category at +29%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 20 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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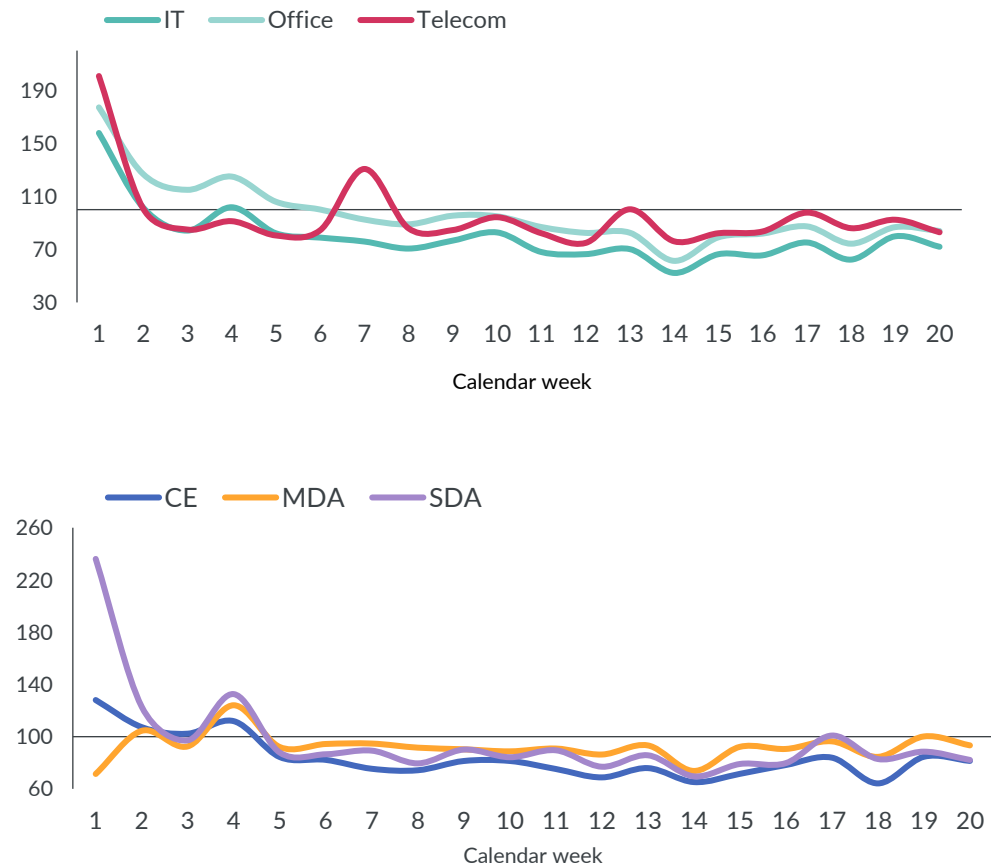
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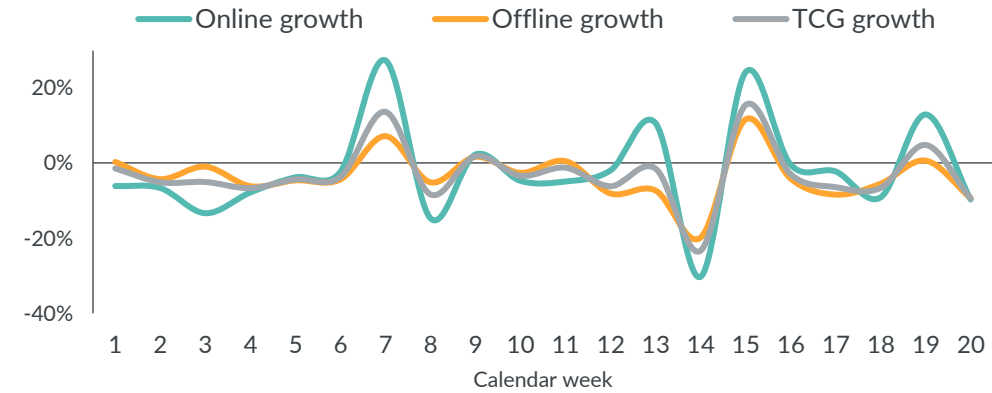
Brazil

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 20 (May 15 – May 21)



- Traditional retail experienced a minus of 9% versus week 20 in 2022 and online sales were down by -10% versus the same week last year, resulting in a downswing of the total TCG market of 9%.
- Desktop computing (-20%) was the worst-performing product group among IT/Office products. Laser printers at -4% were hit least. Smartphones witnessed a slight minus of 2% while headsets grew by 8%.
- CE products were double-digit negative as were shavers, vacuum cleaners, and cooling. Hot beverage makers accelerated at +19%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 20 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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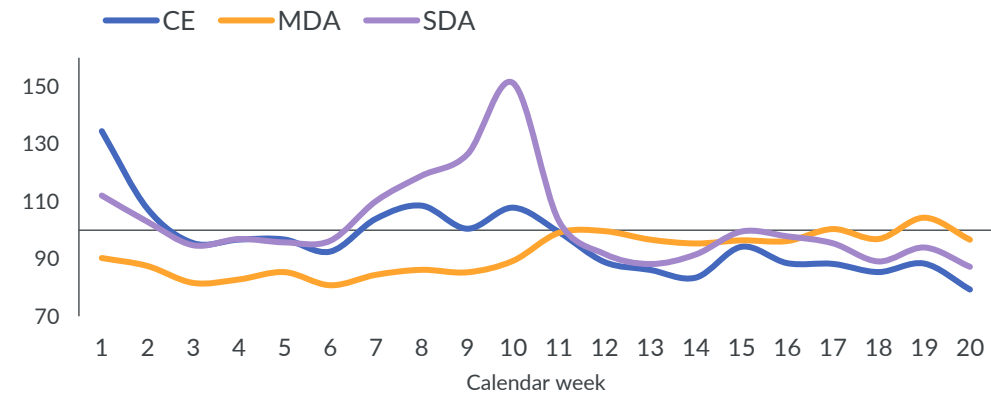
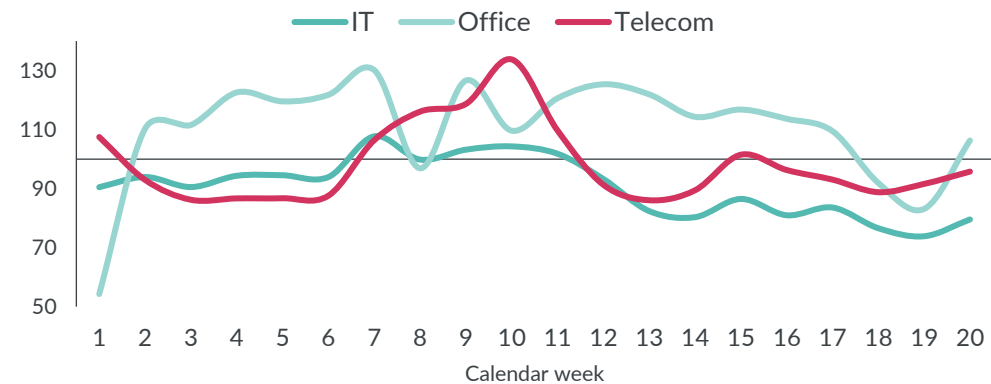
> Russia

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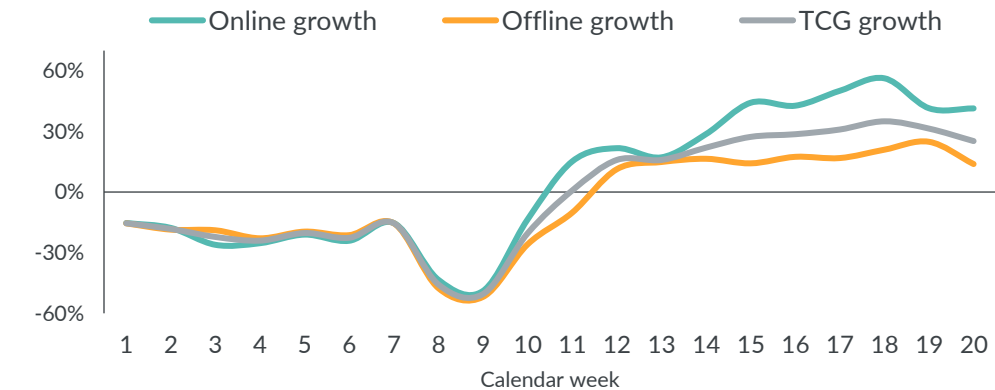
Brazil

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 20 (May 15 – May 21)



- The Russian TCG market continued its recovery, delivering +25% versus week 20 in 2022. Online sales at +41% were the driving force and traditional retail added to it at +14%.
- Laser printers accelerated by 52% with inkjet printers up 42%. Most other IT/Office categories also increased by double digits, except for mobile computing at +9% and desk computing plummeting by 18%.
- Cooling and washing machines delivered +34% and +31% respectively. SDAs were slightly weaker, with air treatment posting +40% and dental care down by 18%. TVs gained 30% while audio home systems grew by +43%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 20 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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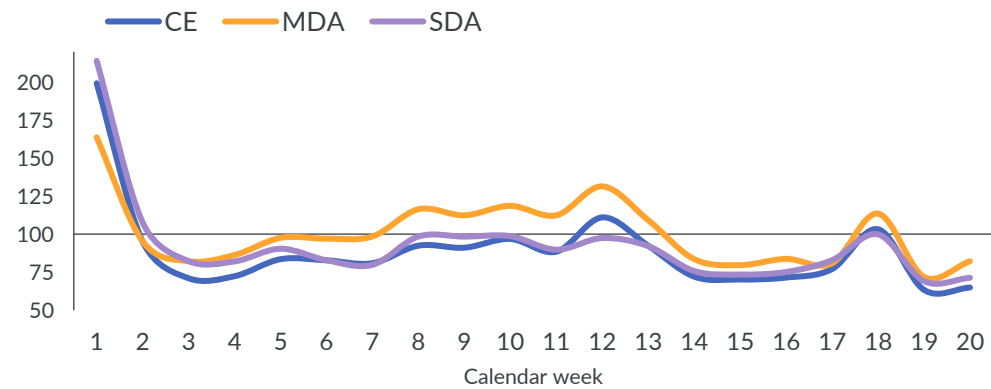
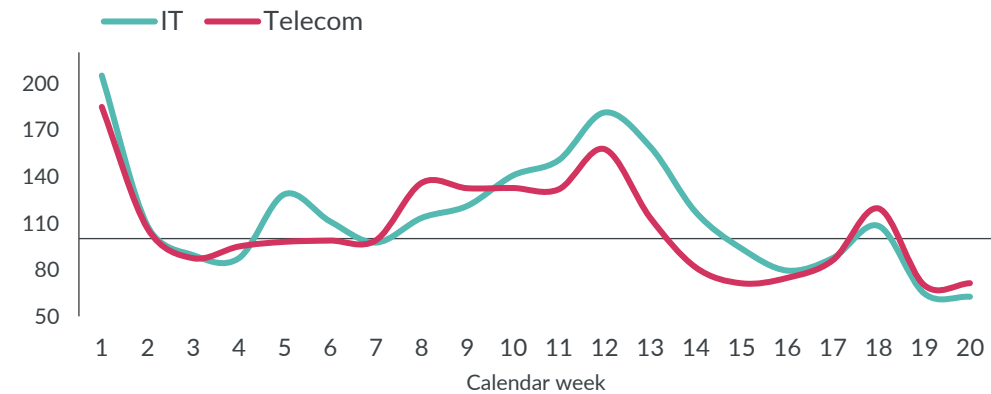
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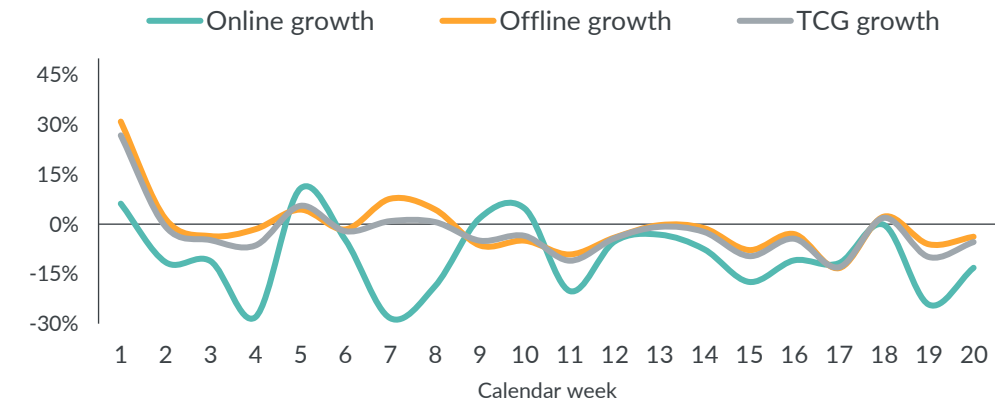
Brazil

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 20 (May 15 – May 21)



- Both distribution types had a less negative development than last week with online sales posting -13% (-24% in week 19) and traditional retail delivering -4% (-6% the previous week). The total TCG market dropped by 5%.
- While smartphones and headsets remained stable, media tablets declined by 35%. Mobile computing posted -7%.
- MDA products witnessed moderate negative trends while TVs dropped by 12% and audio home systems delivered -20%. SDA was down by 2%, driven by vacuum cleaners at -4% and air treatment at -21%. Although the other SDA categories were positive, they were unable to compensate.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 20 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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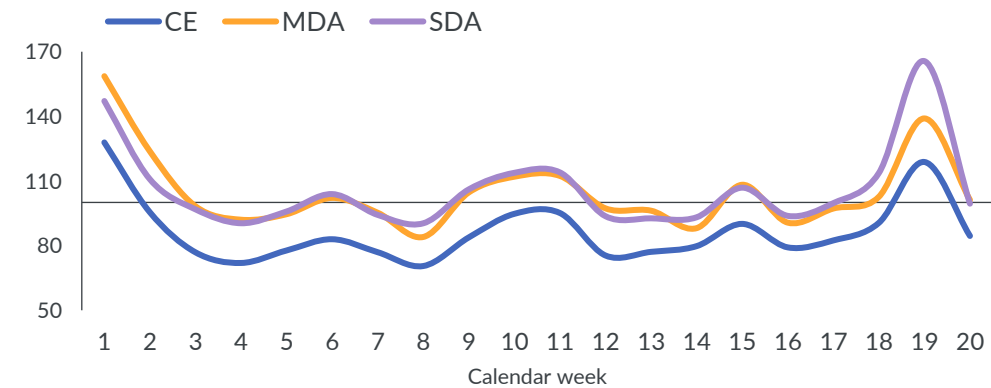
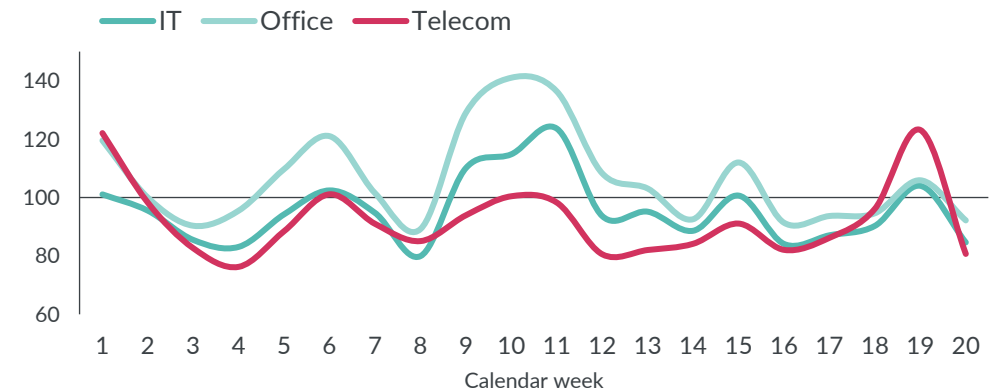
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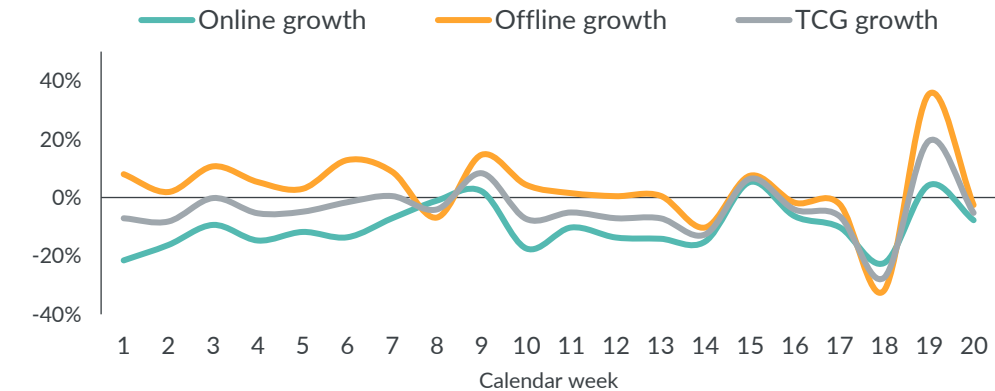
➤ Brazil

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 20 (May 15 – May 21)



- Online sales delivered -8% (+4% the previous week) and traditional retail was down -3% (+35% the previous week), resulting in a downswing of the total TCG market of -5%.
- The rates for IT/Office products ranged from -16% for laser printers to +23% for media tablets. Smartphones lagged at -11%.
- SDA categories delivered solid double-digit growth with shavers out in front at +22%. While cooling dropped by 4%, washing machines were up 6%. TV sales were flat (-0.8%).

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 20 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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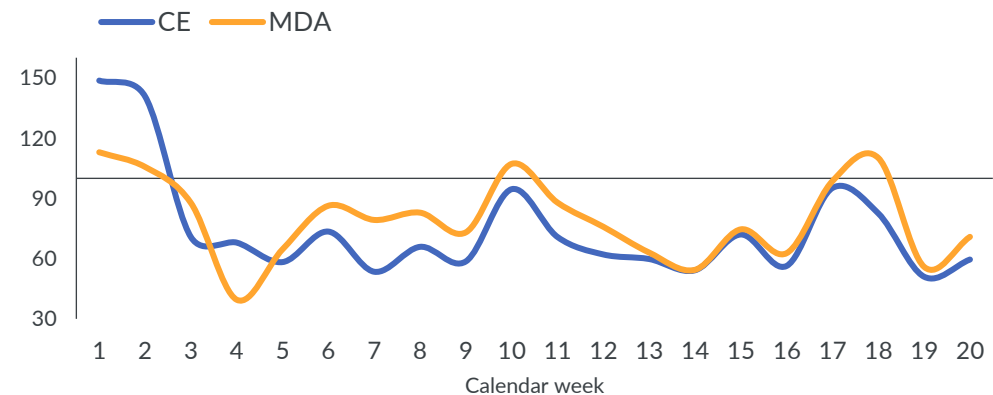
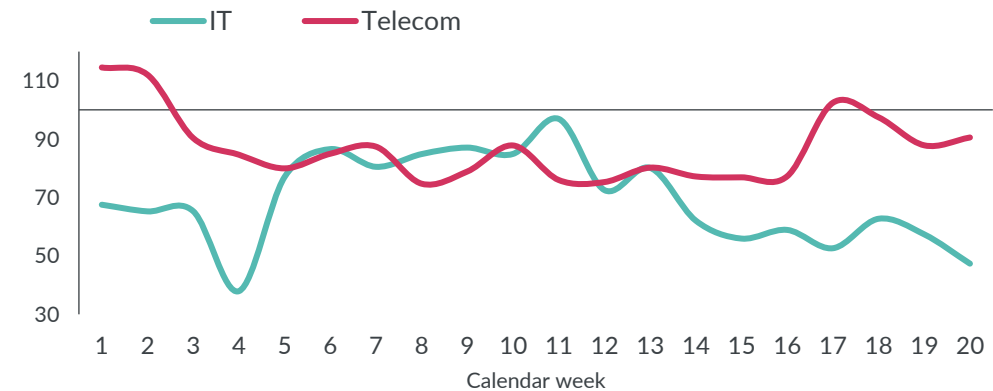
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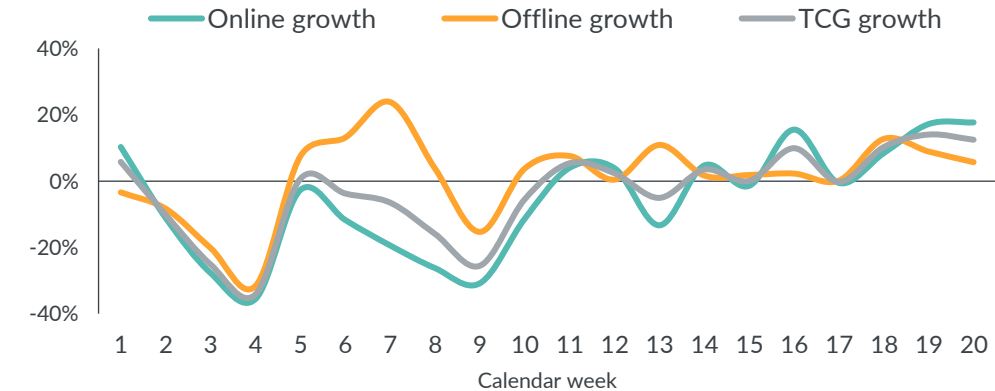


China

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 20 (May 15 – May 21)



- The positive development of online sales (+18%) led to an uplift of the total TCG market of 12%. Traditional retail added to it at +6%.
- Mobile PCs decelerated at -16%. Smartphones delivered a solid plus of 25%.
- Week 20 in 2023 delivered moderate decreases for washing machines (-9%) and cooling (-5%). TV sales slumped at -15%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 20 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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