



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 159

cw23/2023

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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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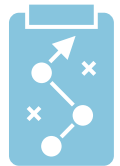
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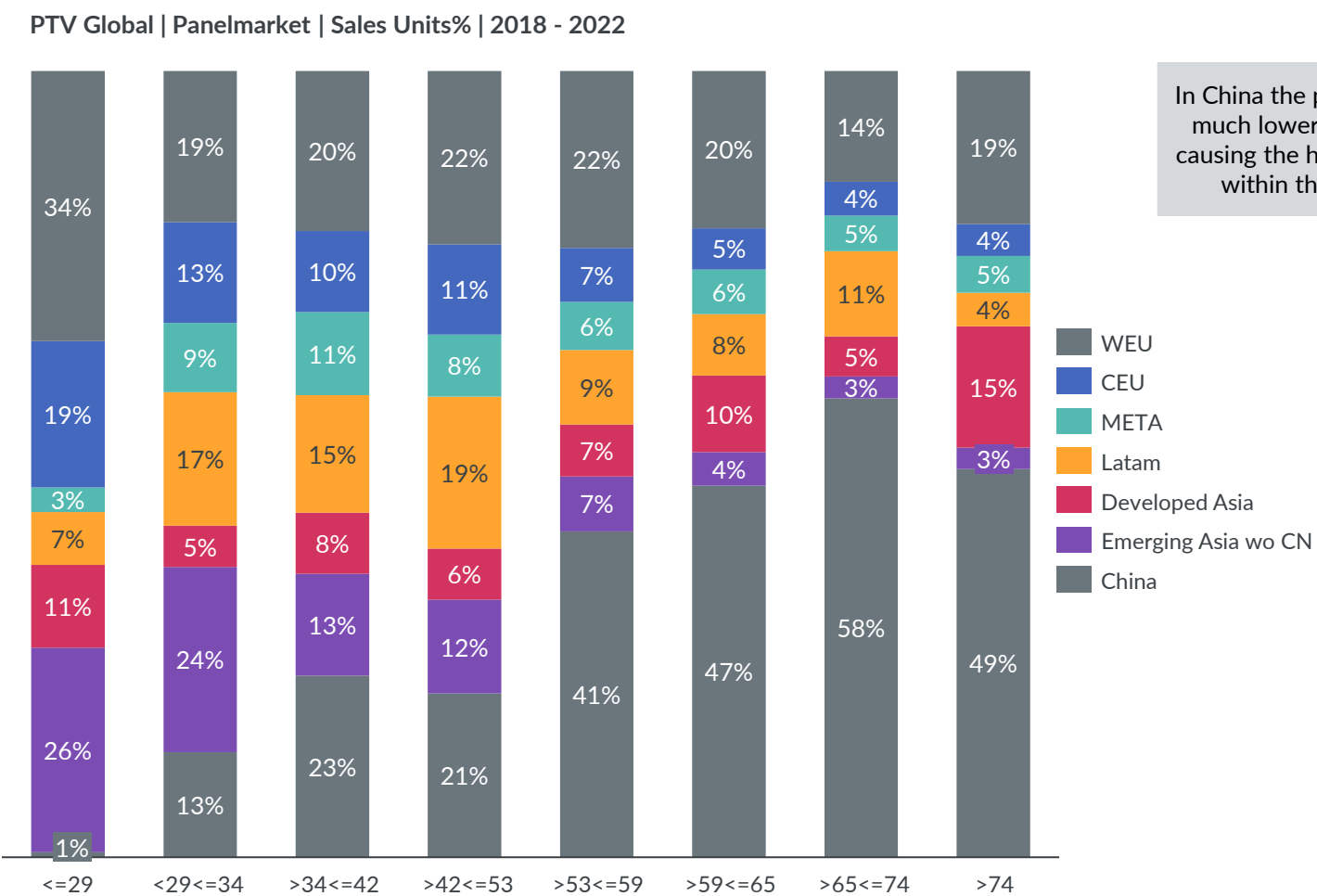
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Fact of the Week

The difference in regional demand by screen size is reflected in varying price levels



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In China the price sentiment is much lower than in the EU, causing the higher importance within the big screens

ASP USD for 70"



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.

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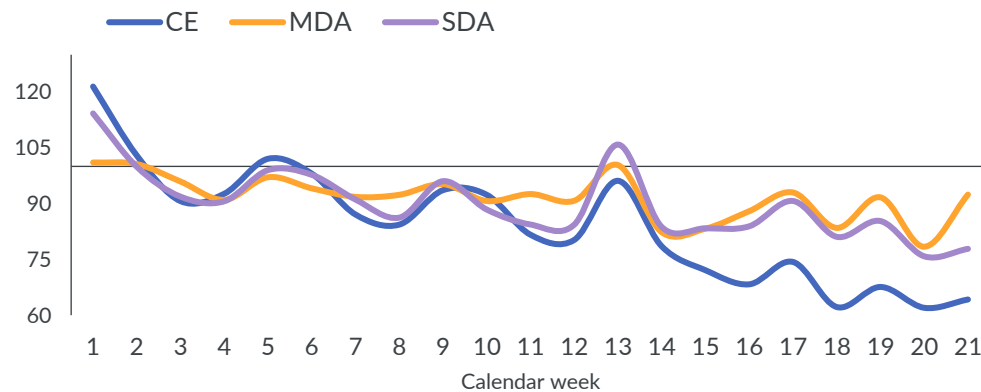
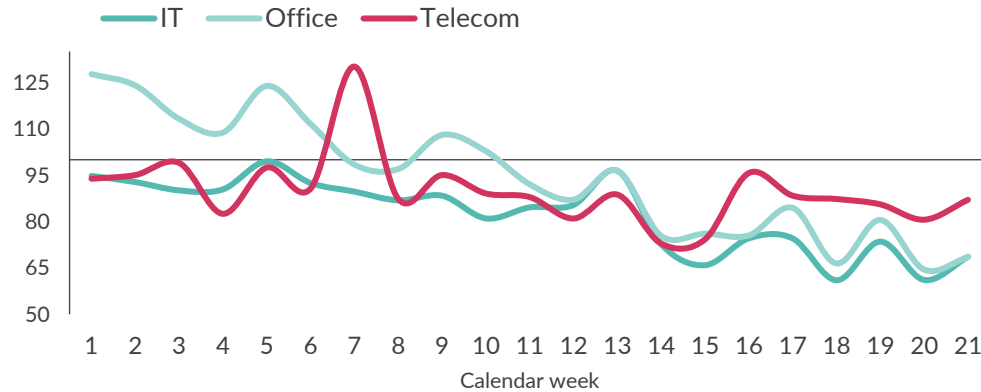
Russia

Japan

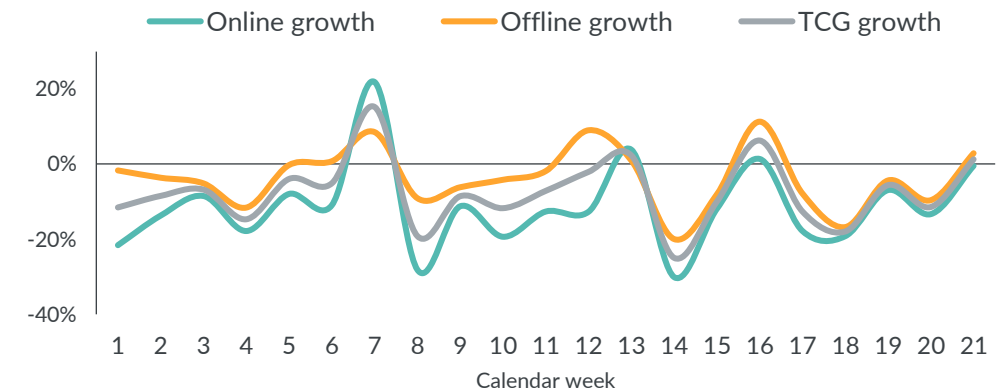
Brazil

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 21 (May 22 – May 28)



- Both distribution types recovered. Traditional retail was up 3% (-10% the previous week) and online sales were flat (-11% in week 20) which led to a slight uptick for the total TCG market of 1%.
- The mixed development for IT/Office products ranged from +11% for laser printers to -19% for desk computing. Smartphones accelerated at +6%.
- There was also a mixed picture for MDA/SDA/CE products, showing dental care out in front at +22% and air treatment bringing up the rear at -36%. Vacuum cleaners and food preparation were flat. TV sales slumped at -13%.

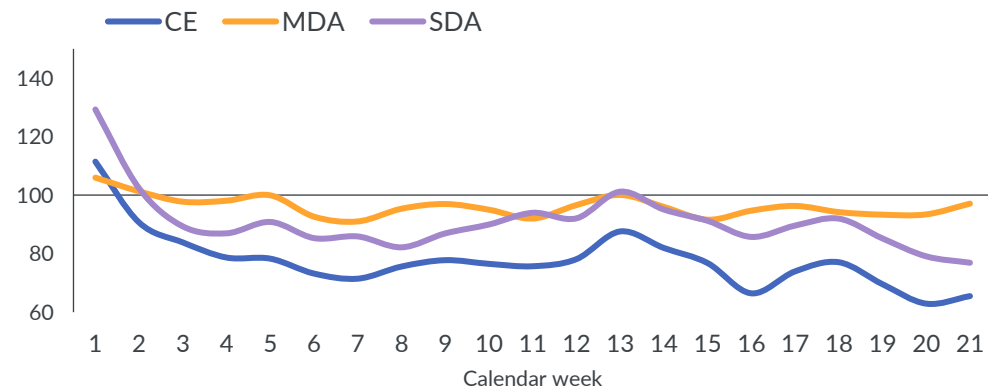
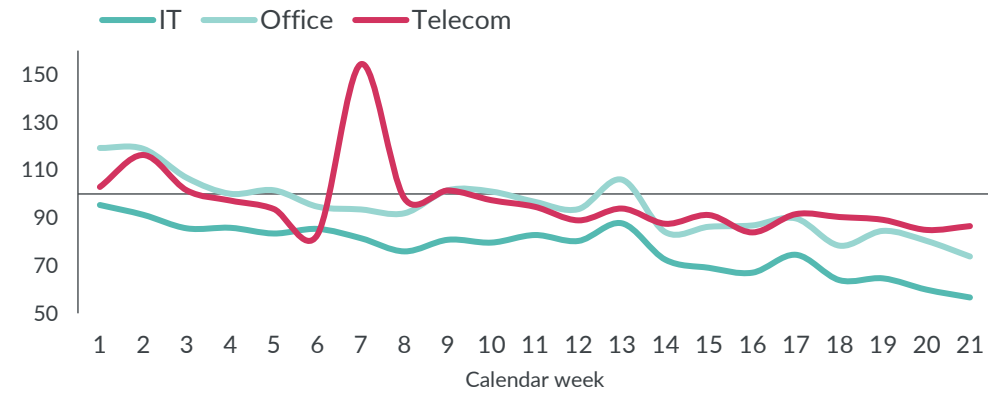
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

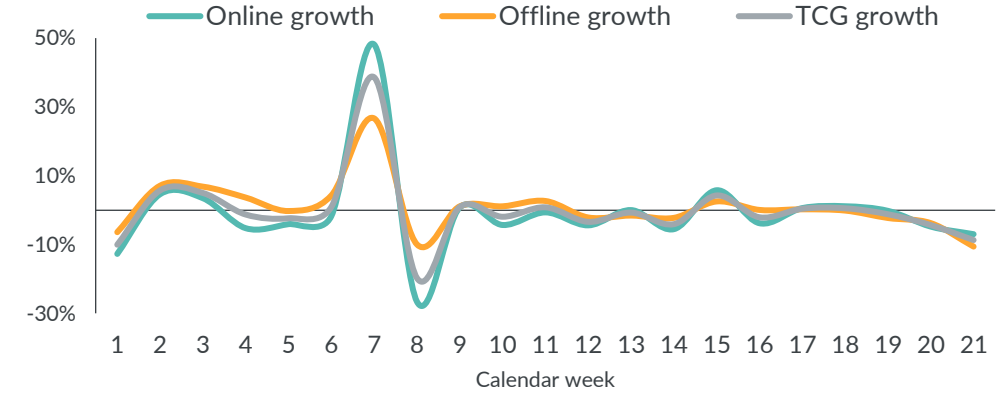


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 21 (May 22 – May 28)



- The deceleration of traditional retail (-11%) dragged the total TCG market down by 9%. Online sales added to it at -7%.
- Smartphones were weak at +2%, while headsets accelerated at +7%. Except for mice at +9% and keying devices at -2%, all other IT categories lost in solid double-digits. Laser printers increased by 19%.
- TVs (-24%) and audio home systems (-27%) declined in double-digits, as did vacuum cleaners (-20%). Washing machines, dental care and hot beverage makers gained 5% and 6% respectively.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 21 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

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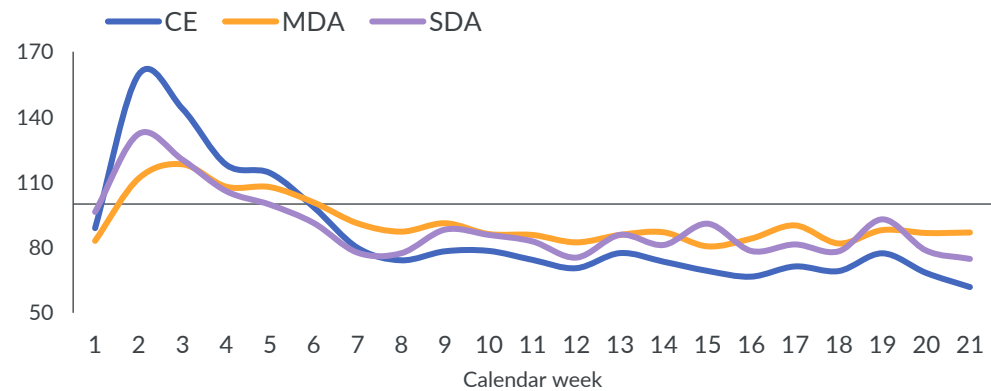
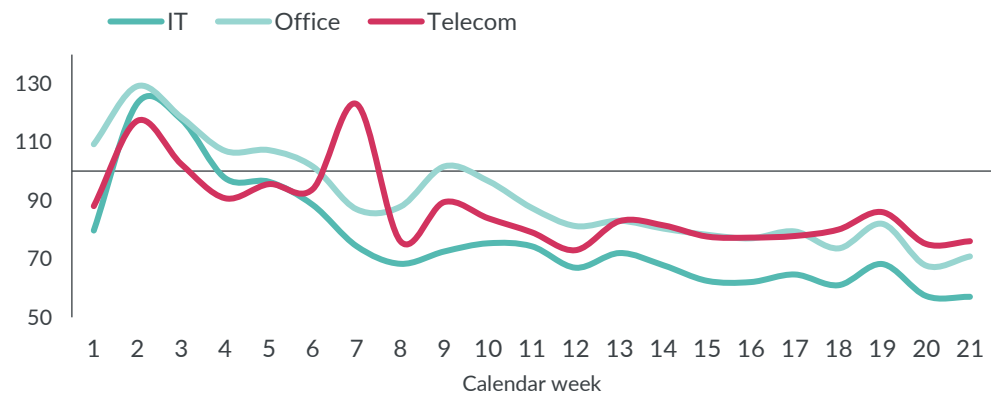
Russia

Japan

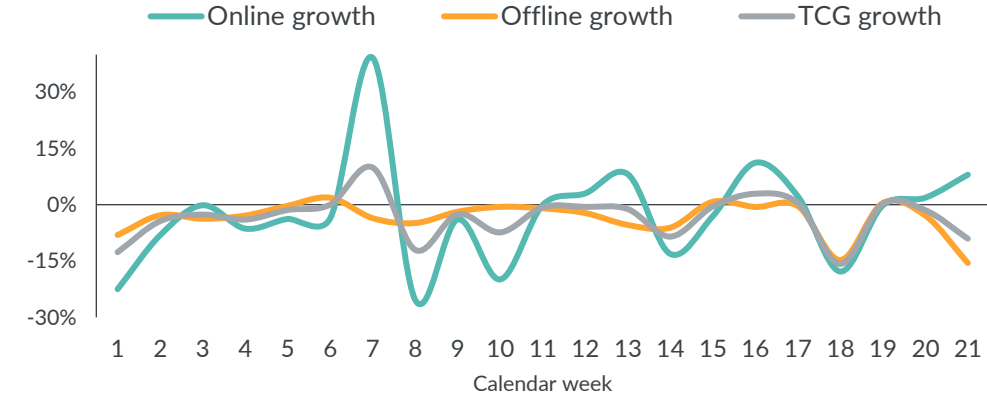
Brazil

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 21 (May 22 – May 28)



- Online sales experienced a plus of 8% vs week 21 in 2022, but this failed to compensate for the losses of traditional retail (-16%) and left the total TCG at a minus of 9%.
- IT/Office products posted trends from -30% for media tablets to +16% for laser printers and mice. While smartphones were flat, headset lagged at -7%.
- MDA/SDA/CE products posted an overall negative picture, which ranged from -36% for audio home systems to -4% for soundbars and -9% for TVs. Washing machines at +8% were the ray of light in week 21.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 21 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



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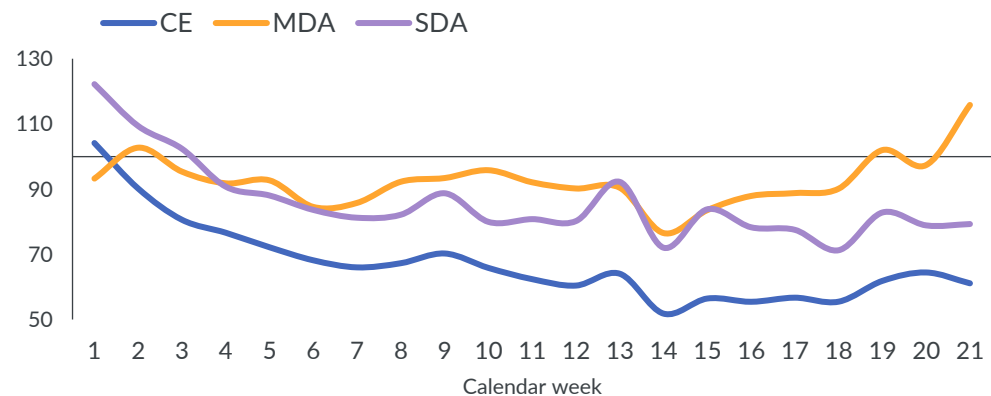
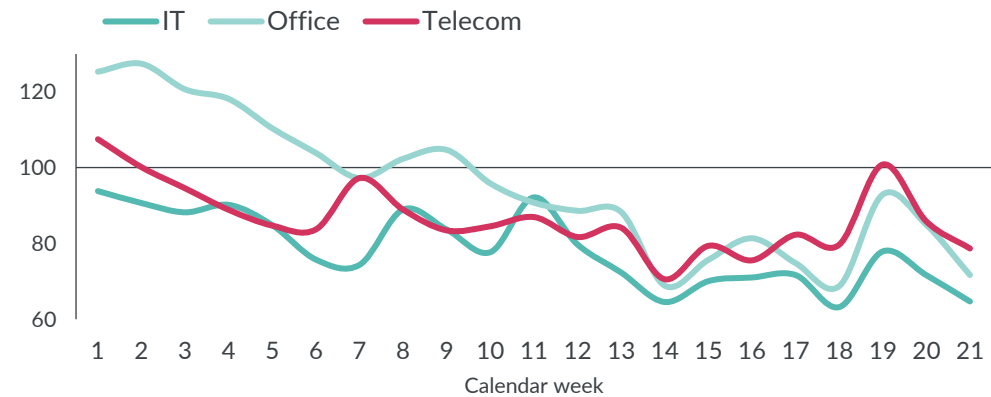
Russia

Japan

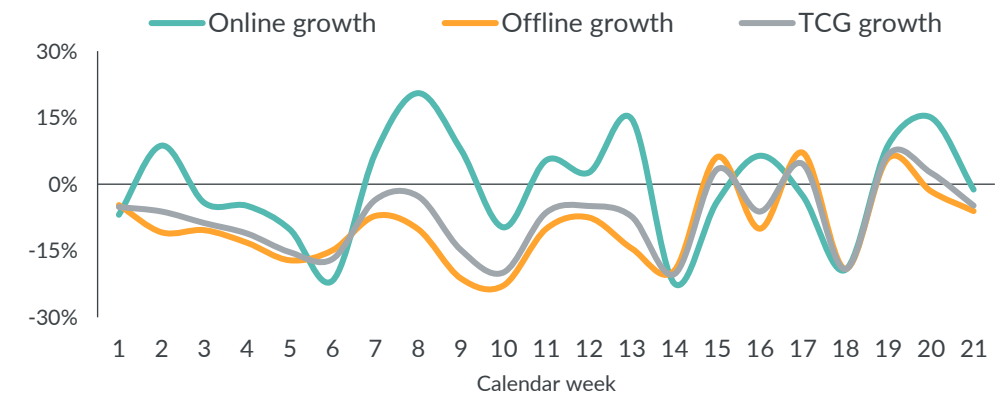
Brazil

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 21 (May 22 – May 28)



- The total TCG market fell by 5%, driven by traditional retail posting -6% in week 21 2023. Online sales declined by just 1%.
- Except for laser printers at +11%, all other IT/Office products decreased, with desk computing and mobile computing declining by 16%. Smartphones were flat.
- While TVs and audio home systems lost in solid double digits, MDA and SDA categories delivered a mixed picture. Washing machines were the best performing category in week 21, at +22%. SDAs ranged from +18% for hot beverage makers to -47% for air treatment.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 21 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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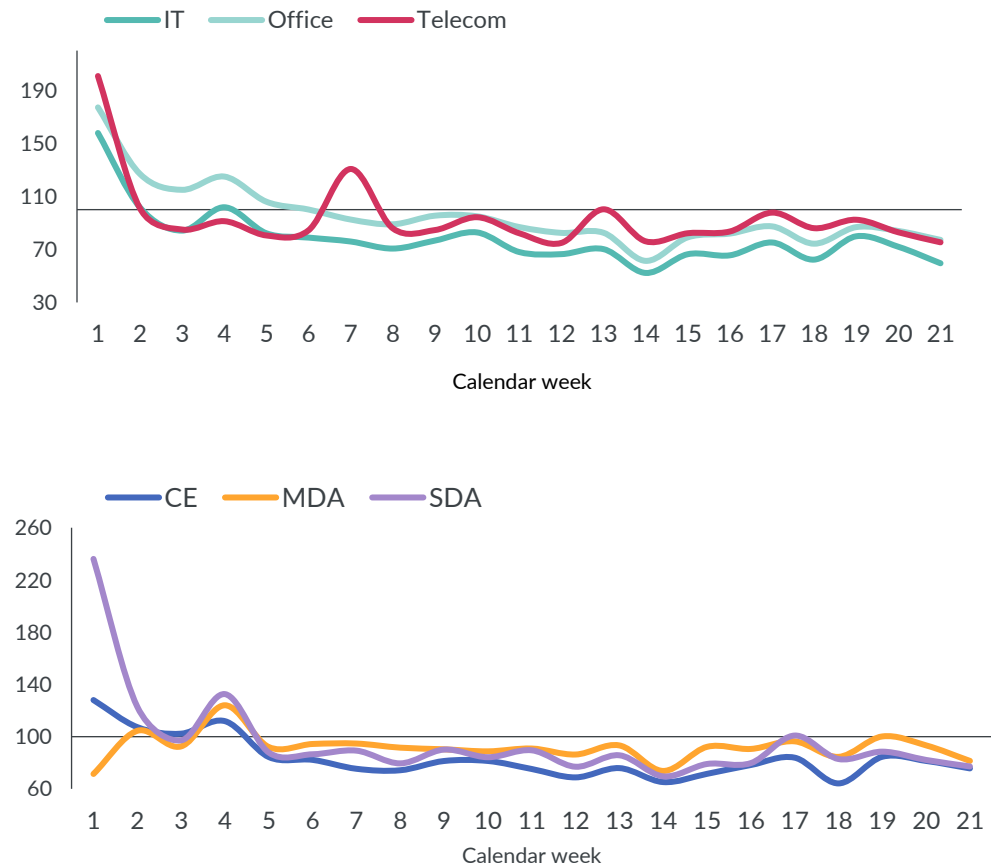
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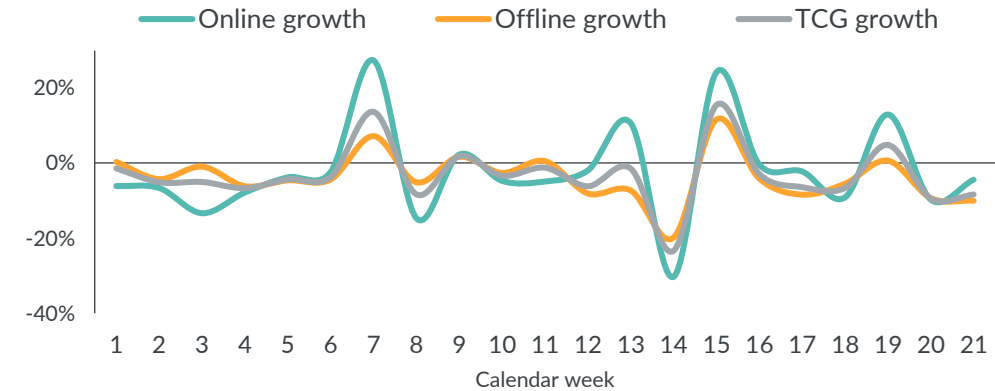
Brazil

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 21 (May 22 – May 28)



- Traditional retail experienced a minus of 10% vs week 21 in 2022 and online sales were down by -4%, resulting in a downswing of the total TCG market of 8%.
- Desktop computing (-28%) was the worst performing product group among IT/Office products. Mobile computing slumped at -15%. Inkjet printers were flat. Smartphones were slightly down 1% while headsets won 8%.
- MDA/SDA/CE products posted a mixed picture with hot beverage makers in the lead at +29% and cooling at the other end of the scale at -24%. TV sales declined by 8%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 21 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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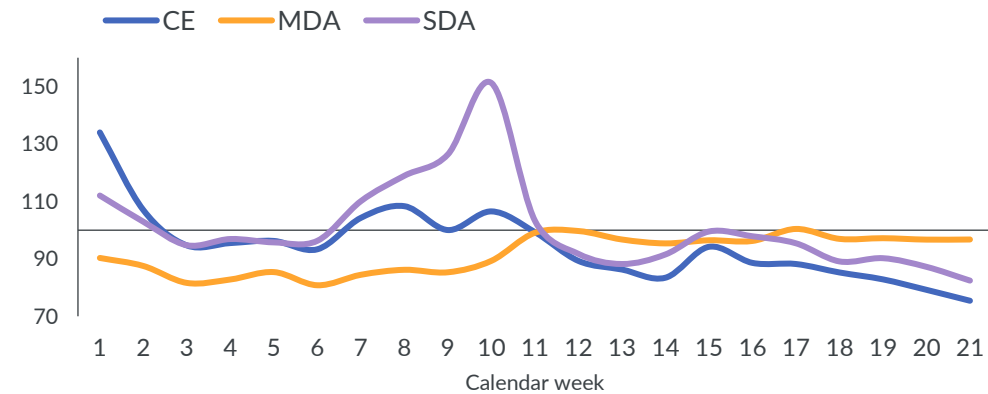
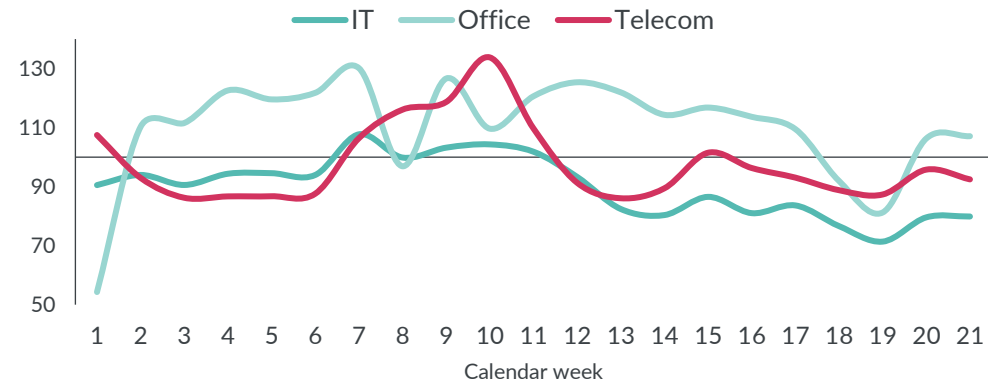
> Russia

Japan

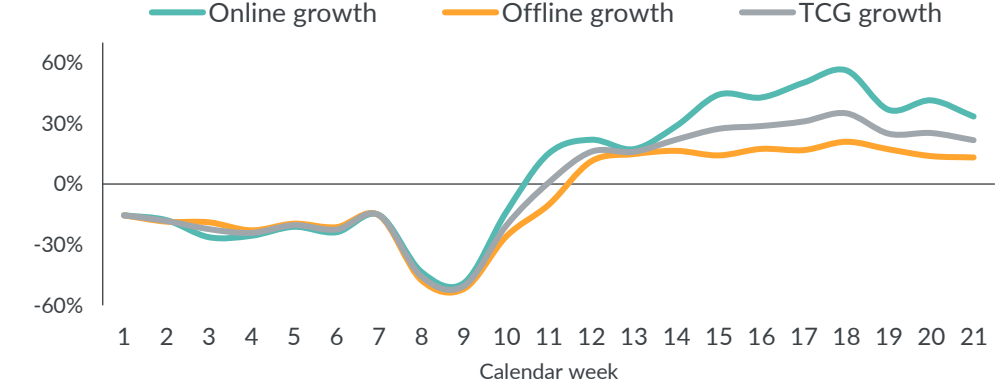
Brazil

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 21 (May 22 – May 28)



- The Russian TCG market continued its recovery, delivering +22% versus week 21 in 2022. Online sales at +33% were the driving force. Traditional retail added to it at +13%.
- Laser printers accelerated by 48% with inkjet printers up 37%. Most other IT/Office categories also increased by double digits, except for mobile computing at +2% and desk computing plummeting by 22%.
- Cooling and washing machines delivered +35% and +38% respectively. SDAs were slightly weaker, with air treatment posting +35% and dental care down by 16%. TVs gained 24% while audio home systems grew by +52%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 21 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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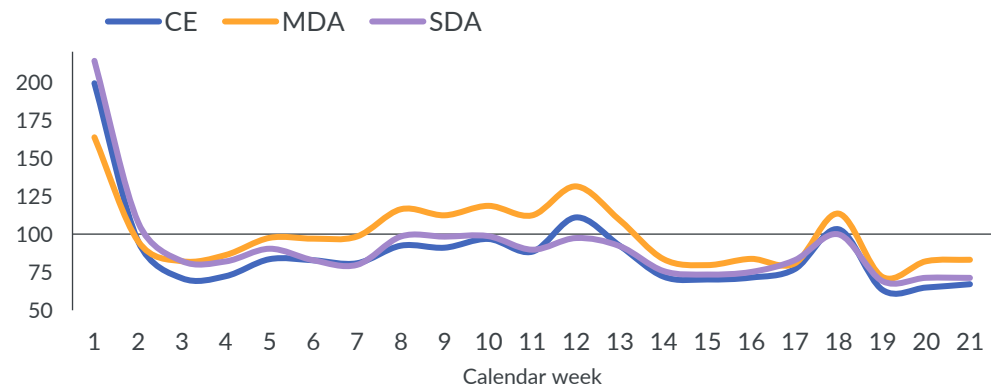
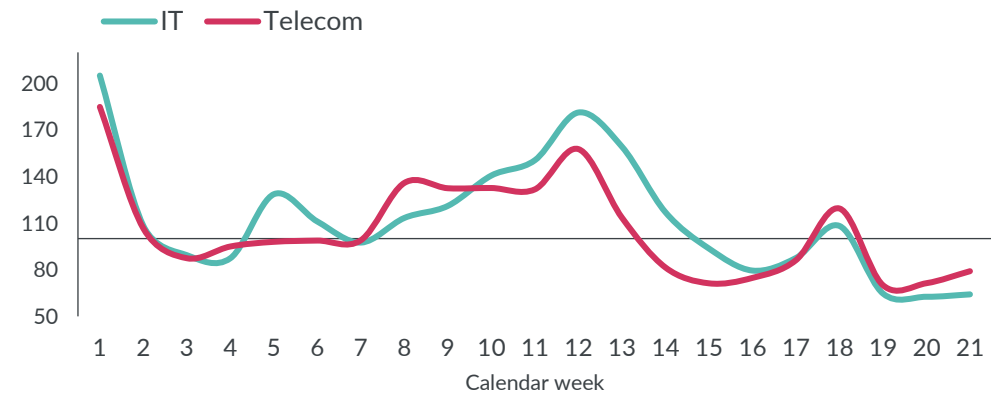
Russia

➤ Japan

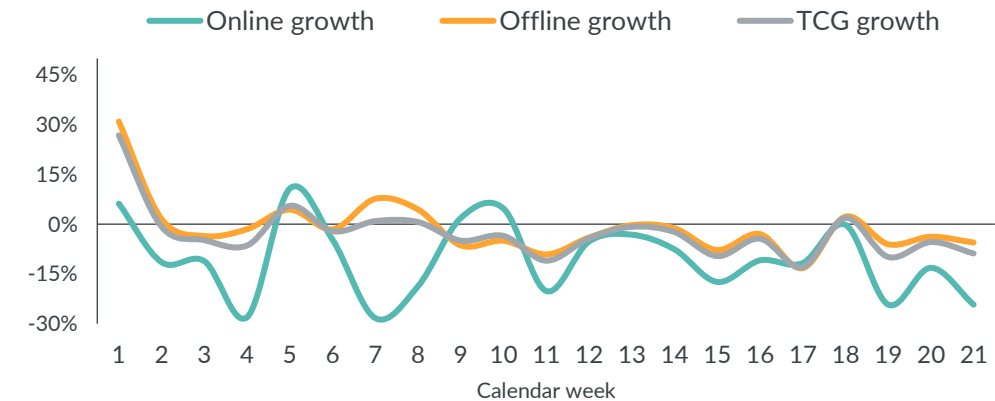
Brazil

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 21 (May 22 – May 28)



- Both distribution types were more negative than last week with online sales posting -24% (-13% in week 20) and traditional retail delivering -6% (-4% the previous week). The total TCG market dropped by 9%.
- While smartphones remained nearly stable (-0.9%), media tablets declined by 31% and mobile computing posted -9%. Headsets slumped at -22%.
- CE products dropped in solid double digits with audio home systems posting -23% and TVs -11%. MDA/SDA categories were less negative and ranged between -21% for air treatment and +16% for dental care. Washing machines and shavers posted moderate numbers of -2% and +2% respectively.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 21 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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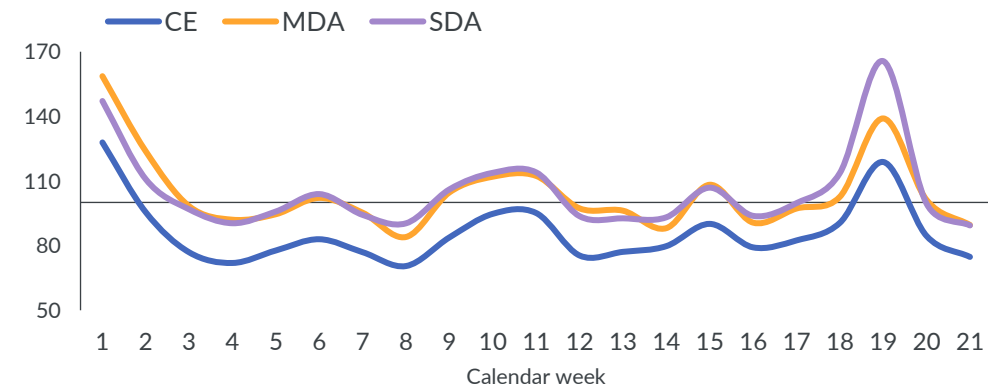
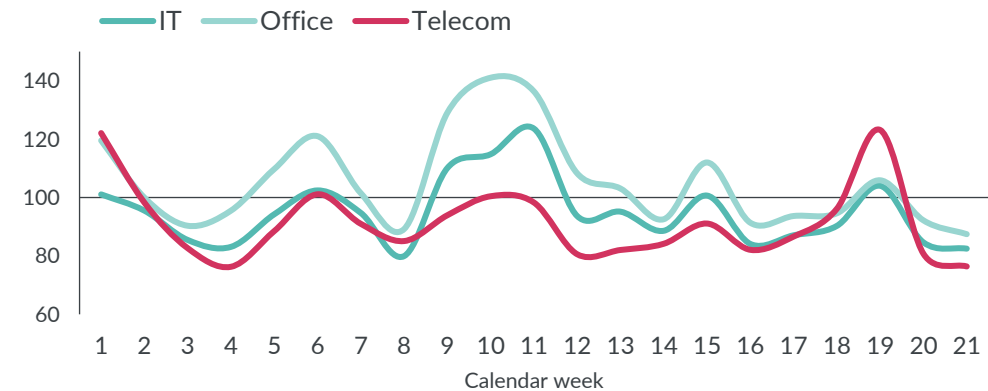
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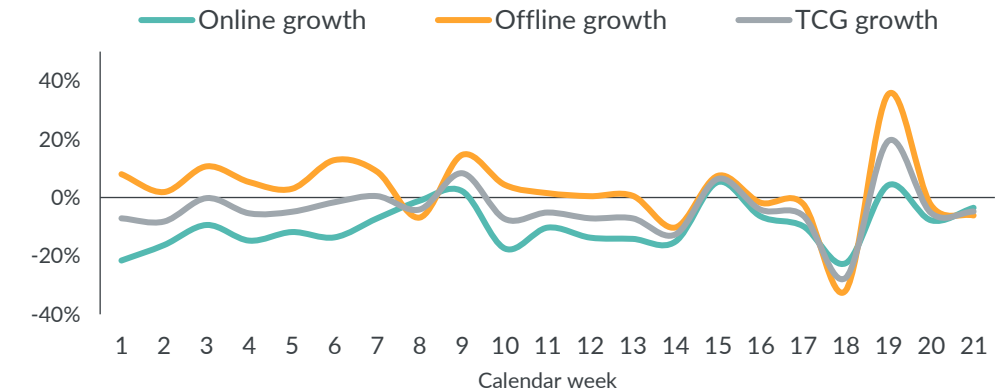
➤ Brazil

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 21 (May 22 – May 28)



- Online sales delivered -3% (-8% the previous week) and traditional retail was down -6% (-3% the previous week), resulting in a downswing of the total TCG market of -5%.
- The rates for IT/Office products ranged from -15% for mobile computing to +41% for media tablets. Smartphones lagged at -7%.
- SDA categories delivered growth with hot beverage makers out in front at +16% and vacuum cleaners up 11%. While washing machines dropped by 3%, cooling was up 5%. TV sales lagged at -7% and audio home systems slumped at -15%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 21 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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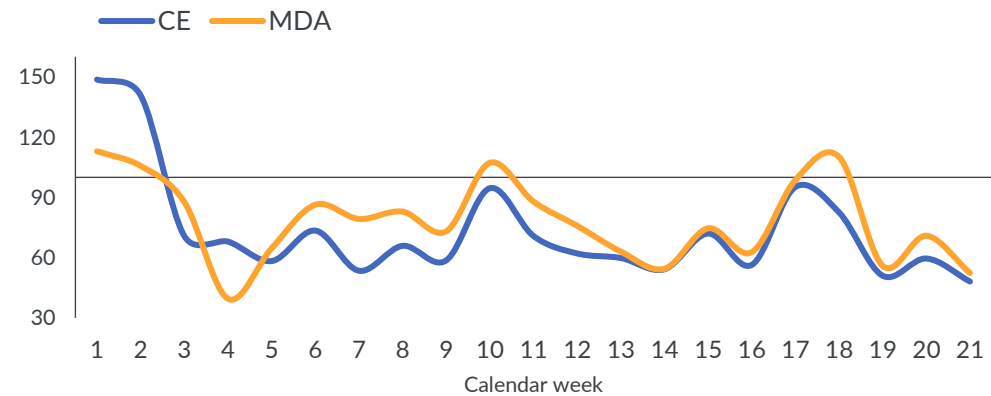
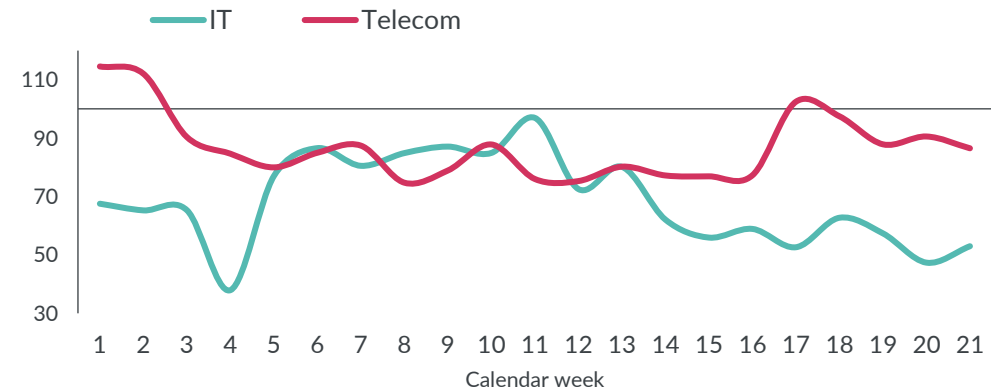
Japan

Brazil

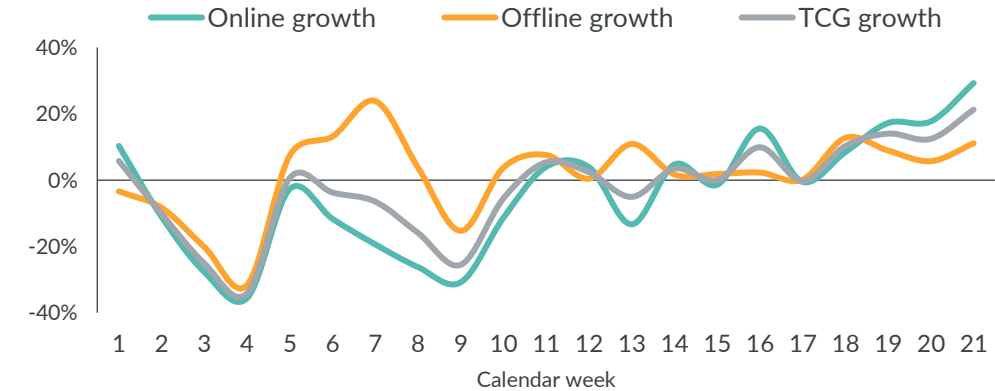


China

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 21 (May 22 – May 28)



- Strong results for online sales (+29%) lifted the total TCG market to a plus of 21%. Traditional retail at +11% added to it.
- Mobile PCs accelerated at 34%. Smartphones delivered moderate growth of 6%.
- MDAs and TV sales remained weak in week 21 with -10% for cooling, -12% for washing machines, and -11% for TVs.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 21 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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