



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 160

cw24/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

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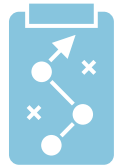
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Consumers are increasingly choosing energy efficient home appliances



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Buying behaviour mirrors the growing attitude towards sustainability

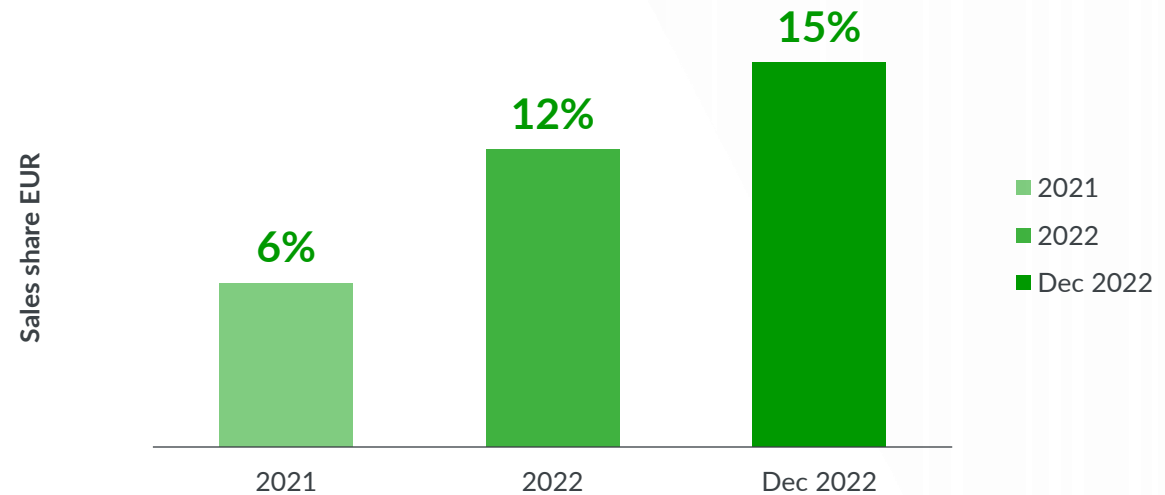
The new energy label (introduced in March 2021 in the EU) remains a **pivotal anchor point** for consumers' decision making.

- Sales share of "A-class" more than doubled in one year
- In certain categories/countries the share of "A-class" is above 60%
- Prices for best in class energy label products become more affordable

"The new EU label achieved a primary goal – it differentiates appliances, and strong energy efficiency is an aspirational feature again."

Best energy class "A" - sales share in Europe

(Washing machines, fridges, freezers, dishwashers)



Weekly retail insights from the Point of Sale

Spotlight on Germany



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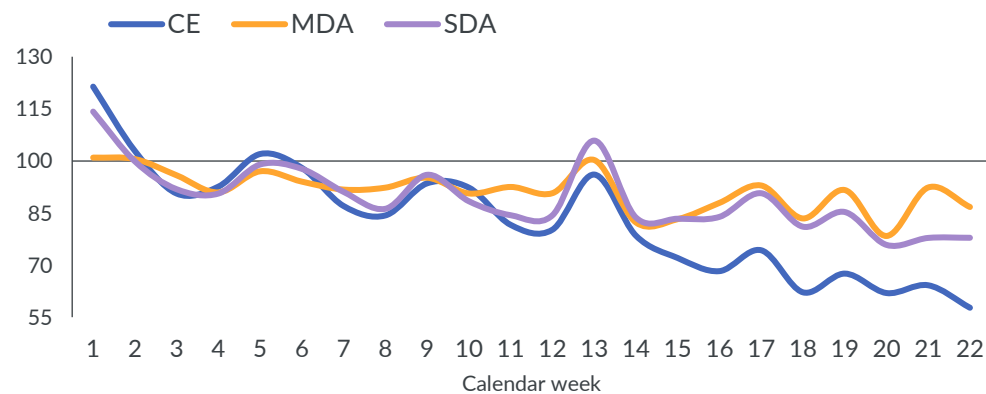
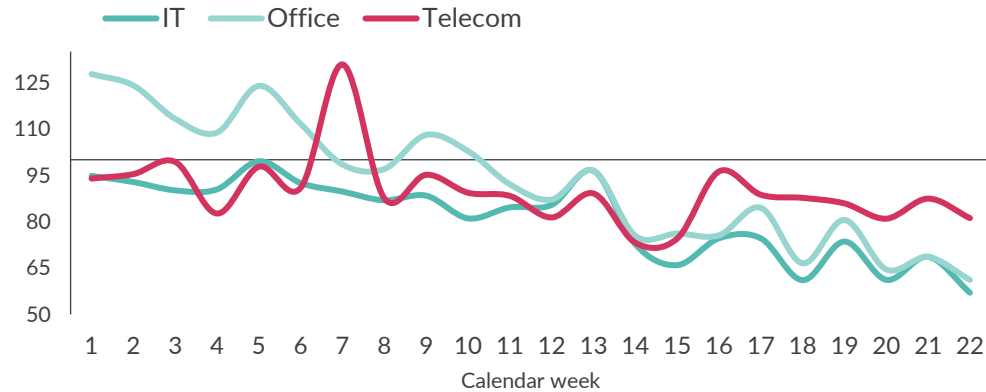
Japan

Brazil

China

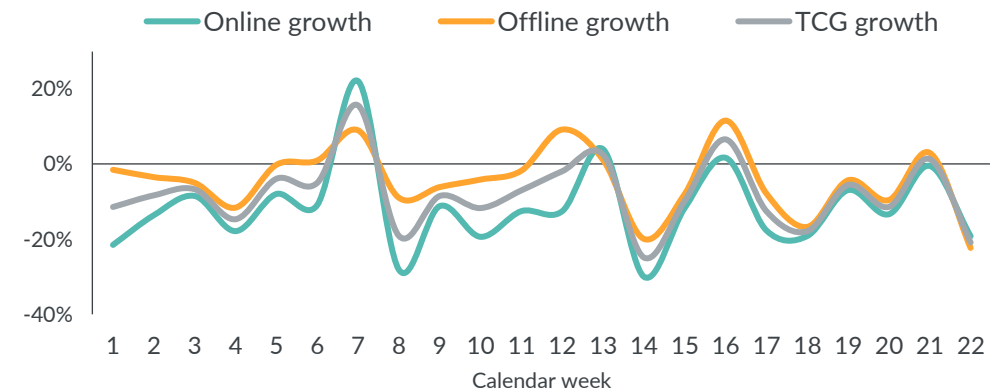
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 22 (May 29 – June 04)

- In Whit Monday week, the total TCG market dropped by 21%, driven by traditional retail at -22%. Online sales were down 19%.
- All IT/Office products lost in double digits, led by inkjet printers at -40%. Laser printers and smartphones also fell, but were hit the least, delivering -22%.
- There were also double-digit declines for the CE categories and for cooling, hot beverage makers, and food preparation. Air treatment, vacuum cleaners, and shavers were flat.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 22 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.

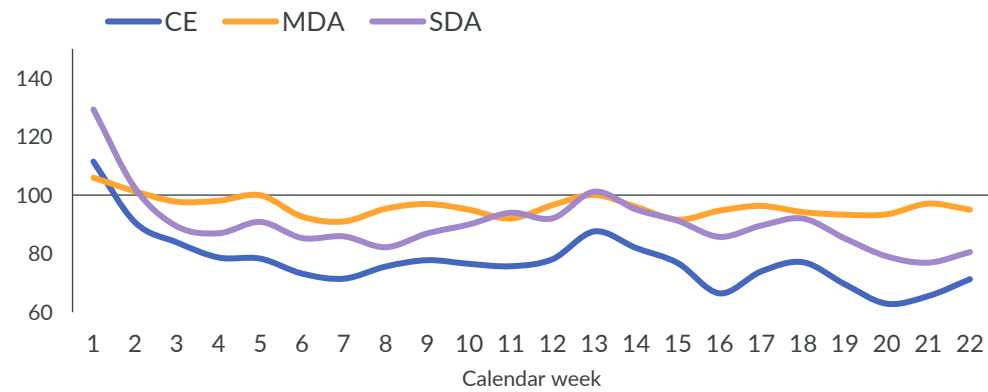
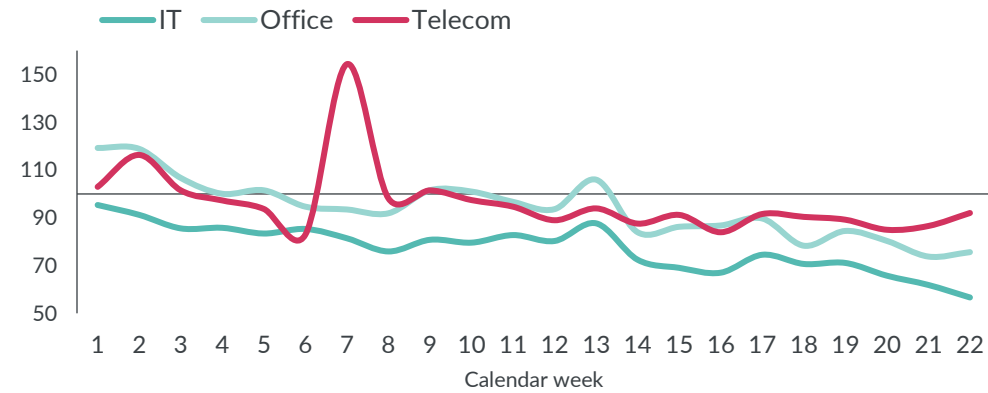
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

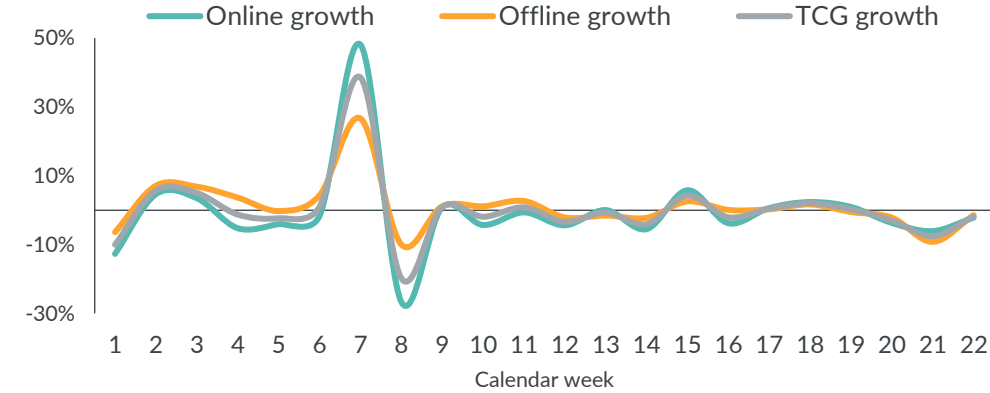


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 22 (May 29 – June 04)

- Similar rates of -1% for traditional retail and -2% for online sales dragged the total TCG market down by 2%.
- Except for laser printers at +17% and mice at +2%, most other IT/Office products lost in double digits. Keyboards decreased by 4%. Smartphones accelerated at +20%.
- CE products declined in double digits, too, with TV sales losing 29% and audio home systems at -44%. The mixed picture for MDA/SDA categories saw washing machines in the lead (+6%) and vacuum cleaners bringing up the rear at -15%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 22 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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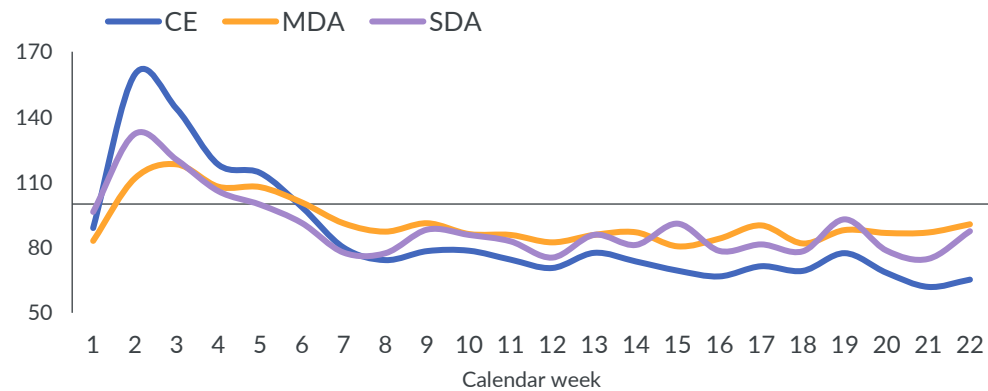
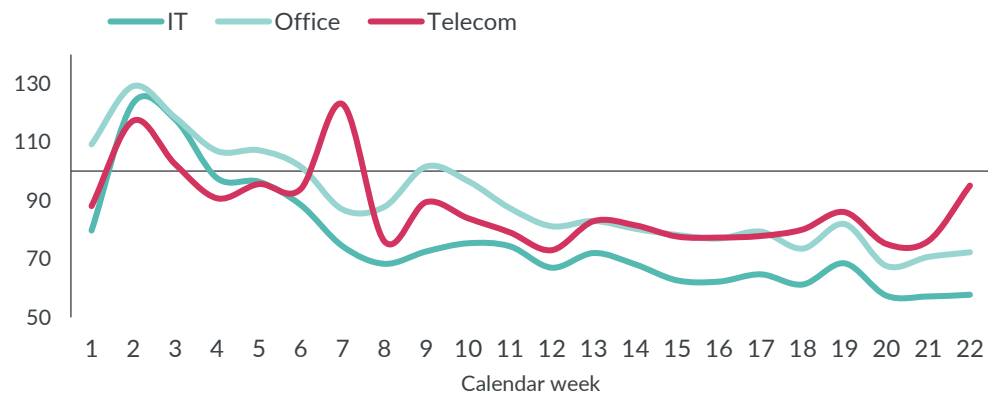
Russia

Japan

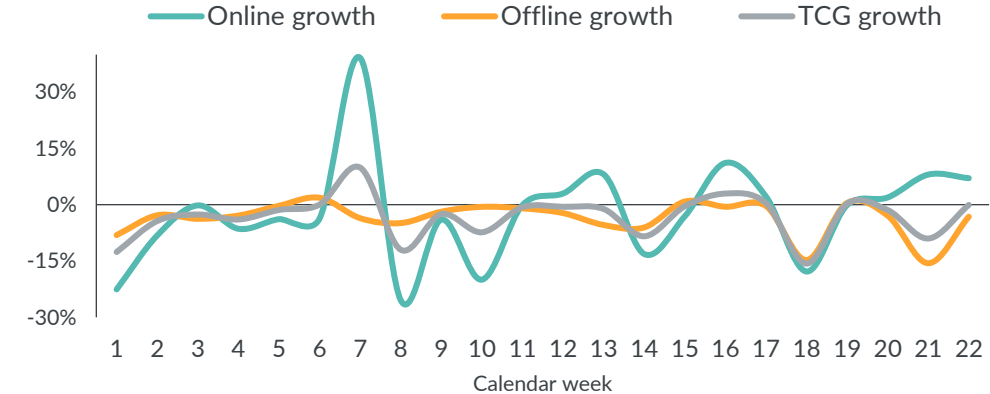
Brazil

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 22 (May 29 – June 04)



- Results of +7% for online sales and -3% for traditional retail delivered a flat total TCG market, up from -9% in week 21.
- Printers and most IT products posted negative trends, ranging from -31% for desk computing to -2% for monitors. The exception was mice at +4%. While smartphones accelerated at +14%, headsets were weak at +4%.
- Air treatment was the best performing product group in week 22, accelerating at +85%. The other MDA/SDA/CE categories delivered a mixed picture, ranging from +10% for hot beverage makers to -26% for dental care. Soundbars were flat.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 22 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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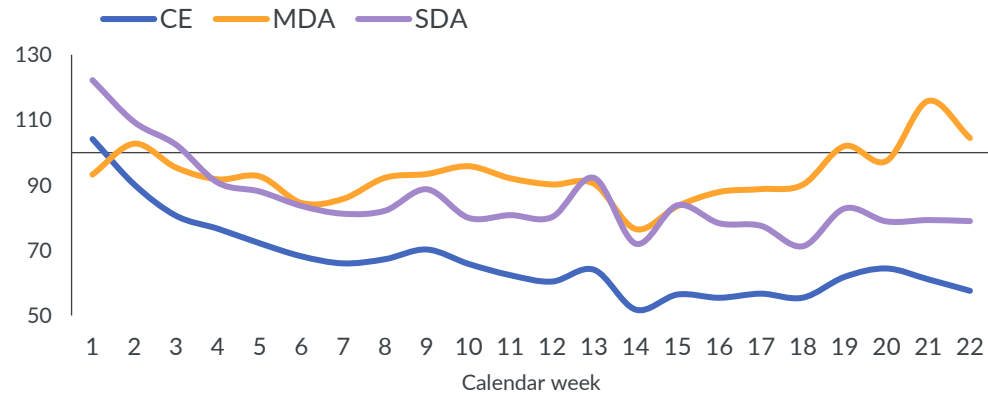
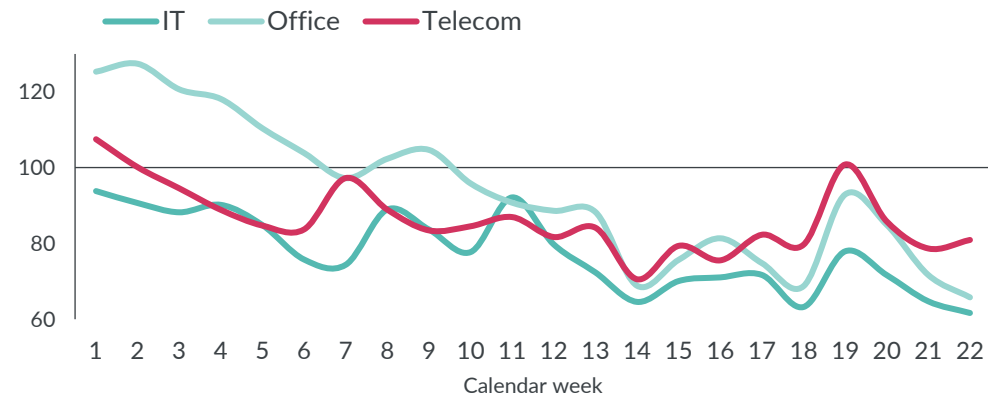
Russia

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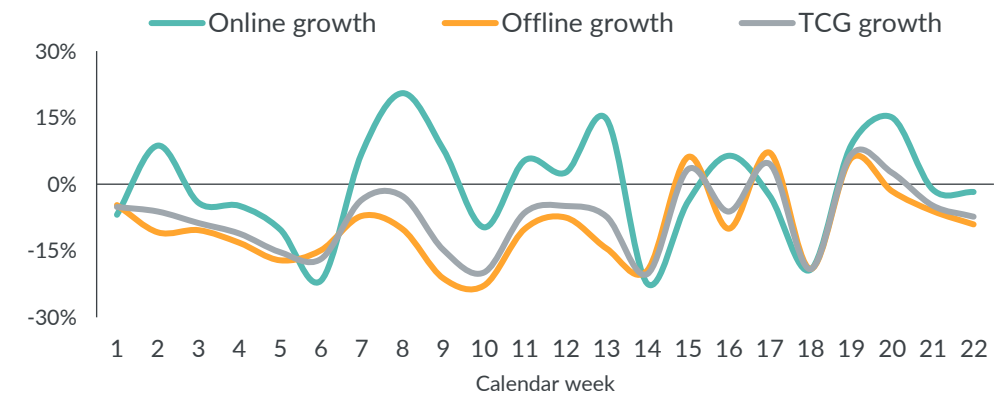
Brazil

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 22 (May 29 – June 04)



- The total TCG market fell by 7%, driven by traditional retail posting -9% in week 22. Online sales declined by just 2%.
- Except for laser printers at +10%, all other IT/Office products decreased, with inkjet printers and desk computing declining by 25% and 20% respectively. Smartphones posted a moderate decline of 3%.
- While CE categories lost in solid double digits (TVs at -25%), MDA and SDA categories delivered a mixed picture. Washing machines were the best performing category in week 22, at +19%. SDAs ranged from +11% for hot beverage makers to -34% for air treatment.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 22 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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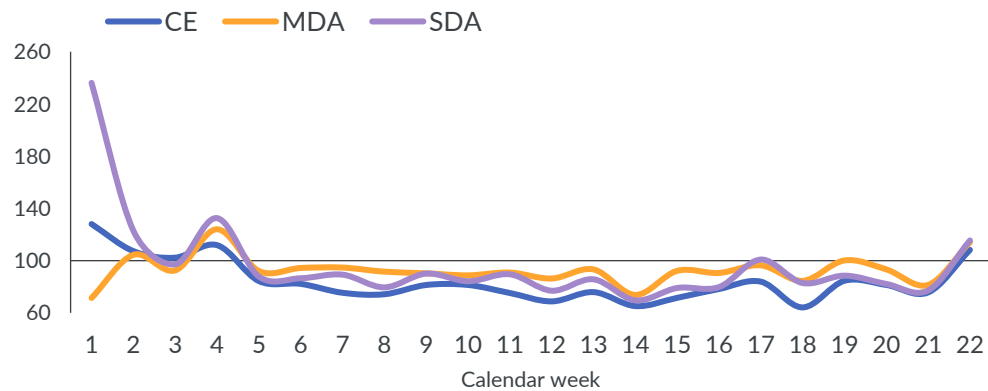
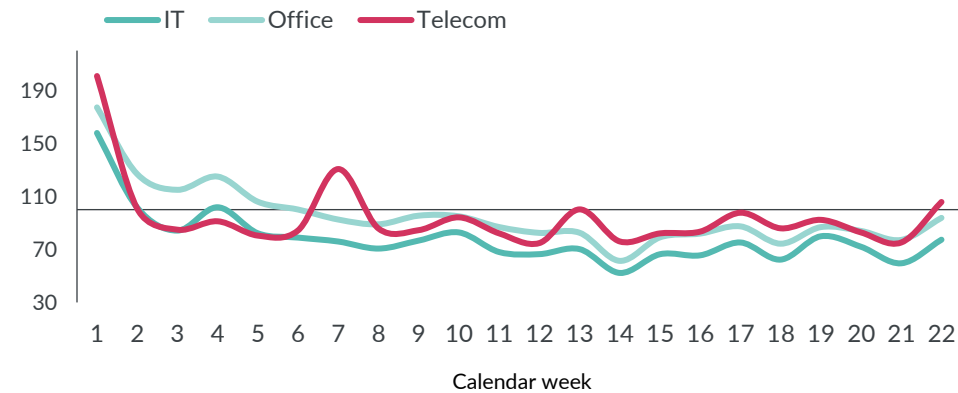
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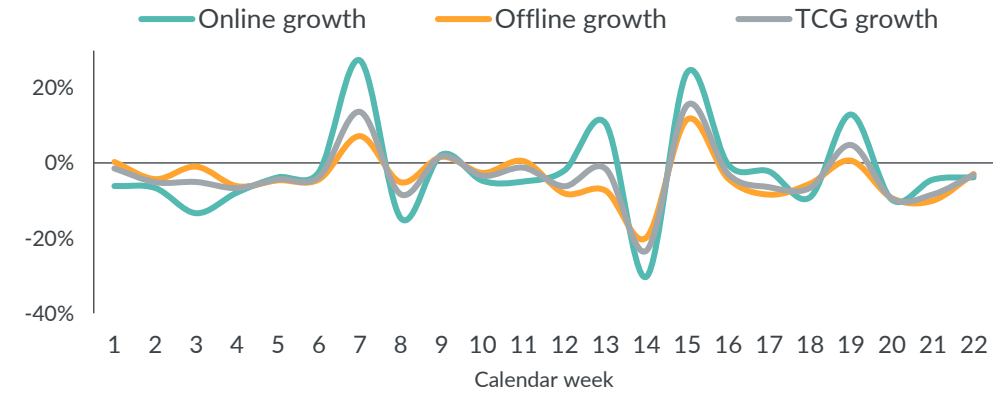
Brazil

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 22 (May 29 – June 04)



- Traditional retail experienced a minus of 3% versus week 22 in 2022 and online sales were down by -4%, resulting in a downswing of the total TCG market of 3%.
- Media tablets (-21%) were the worst performing product group among IT/Office products. Desk computing slumped at -17%. Inkjet printers were flat. Smartphones and headsets both accelerated at +8%.
- Except for hot beverage makers at +33% and vacuum cleaners at +1%, all other MDA/SDA/CE products posted negative trends with soundbars recording -21%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 22 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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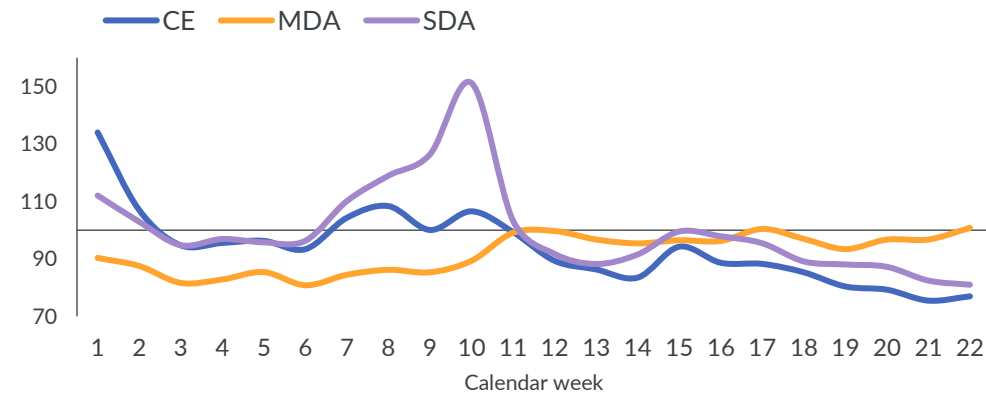
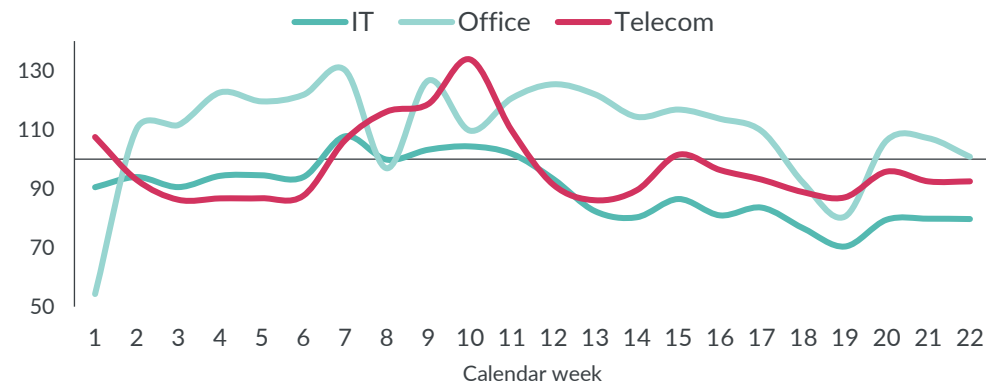
> **Russia**

Japan

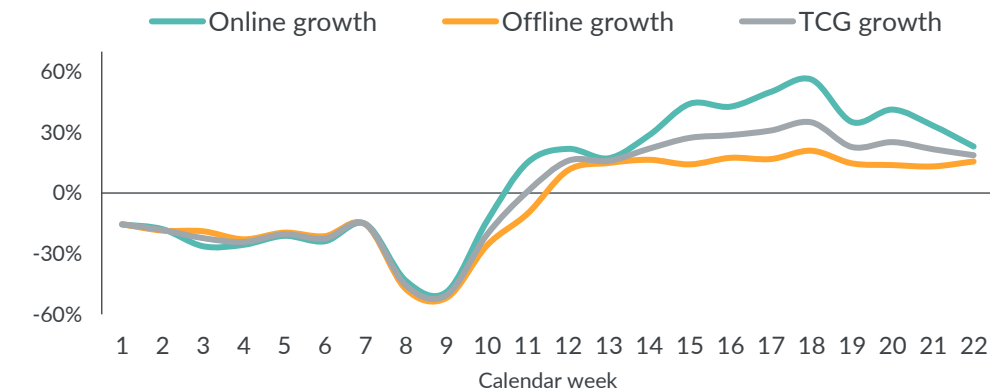
Brazil

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 22 (May 29 – June 04)



- The Russian TCG market continued its recovery, delivering +19% versus week 22 in 2022. Online sales at +23% were the driving force. Traditional retail added to it at +16%.
- Inkjet printers accelerated by 46% with laser printers up 44%. Most other IT/Office categories also increased by double digits, except for desk computing at -6%. Smartphones increased by 25%.
- Cooling and washing machines delivered +27%. SDAs were slightly weaker, with air treatment posting +32% and dental care down by 17%. TVs and audio home systems gained 21% and 20% respectively.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 22 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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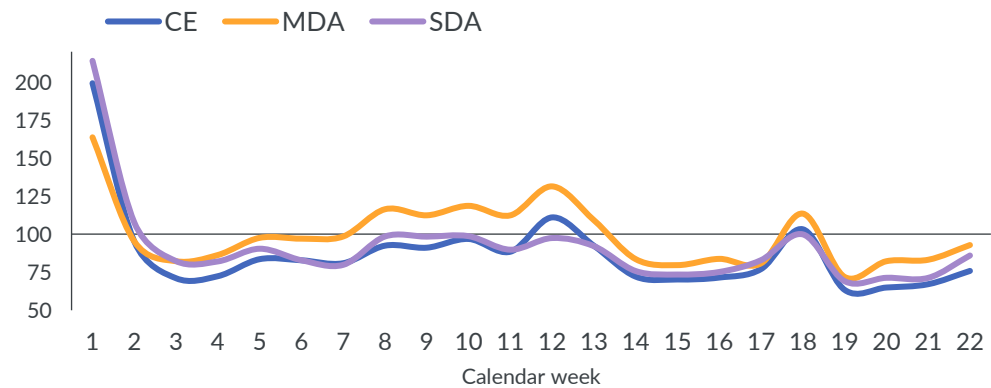
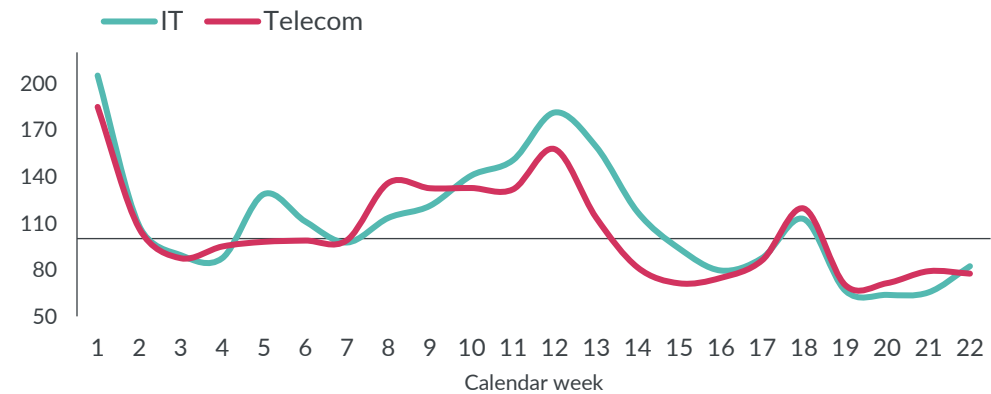
Russia

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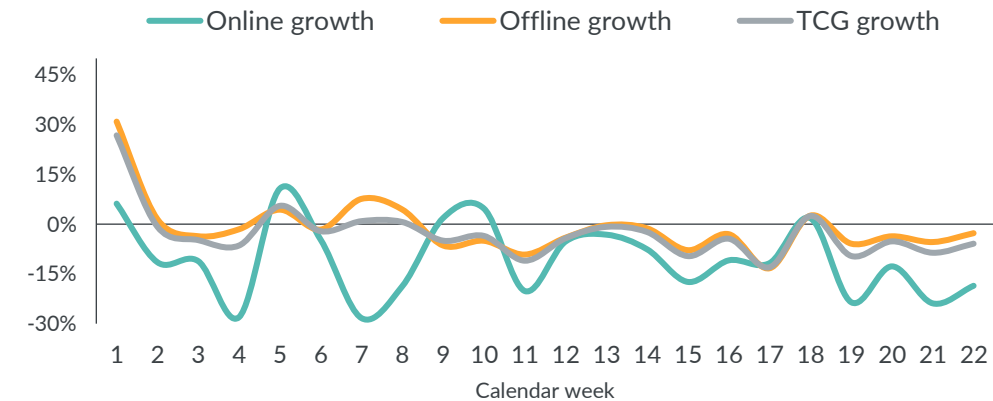
Brazil

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 22 (May 29 – June 04)



- Both distribution types were less negative than last week with online sales posting -19% (versus -24% in week 21) and traditional retail delivering -3% (versus -5% the previous week). The total TCG market dropped by 6%.
- While mobile computing remained stable, media tablets increased by 5%. Headsets slumped at -19% and smartphones lost a moderate 7%.
- Audio home systems were the worst-performing product group in week 22, at -36%. TVs lagged at -11%. MDA/SDA categories were less negative and ranged between -21% for hot beverage makers and +17% for air treatment. Washing machines were almost stable at -0.7%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 22 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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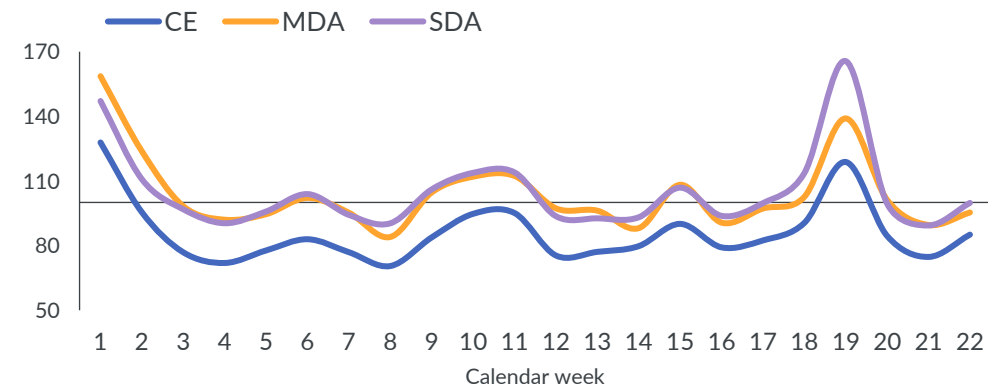
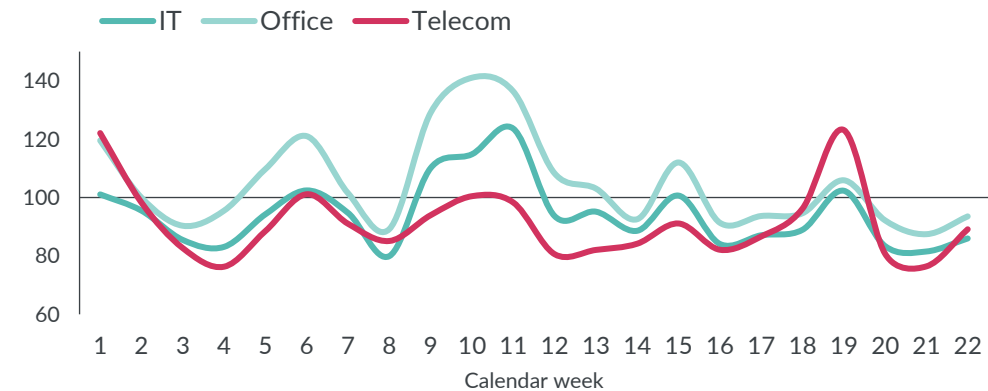
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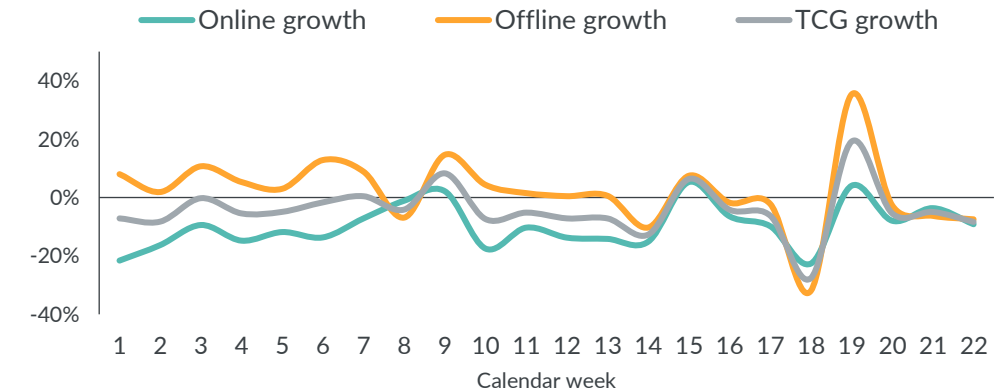
➤ Brazil

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 22 (May 29 – June 04)



- Online sales delivered -9% (-4% the previous week) and traditional retail was down -7% (-6% the previous week), resulting in a downswing of the total TCG market of -8%.
- The rates for IT/Office products were overall negative and ranged from -16% for mobile computing to +4% for media tablets. Smartphones lagged at -9%.
- Except for hot beverage makers at +12% and vacuum cleaners at +10%, MDA/SDA/CE categories delivered negative trends with audio home systems being the weakest category in week 22 at -20%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 22 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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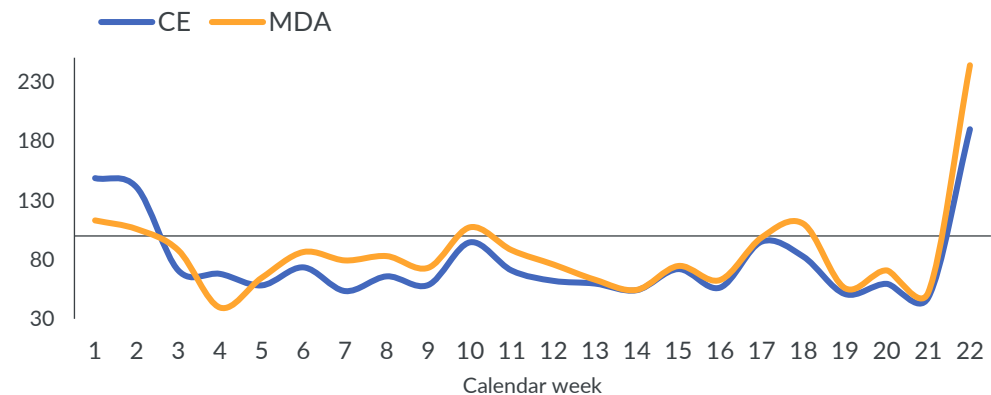
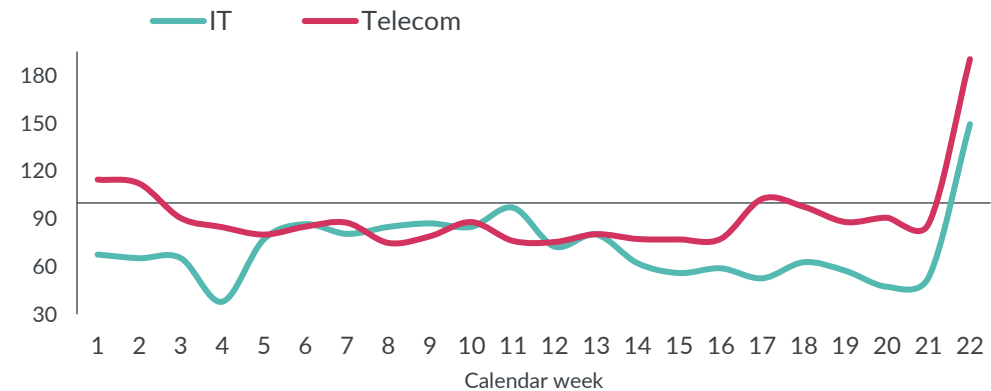
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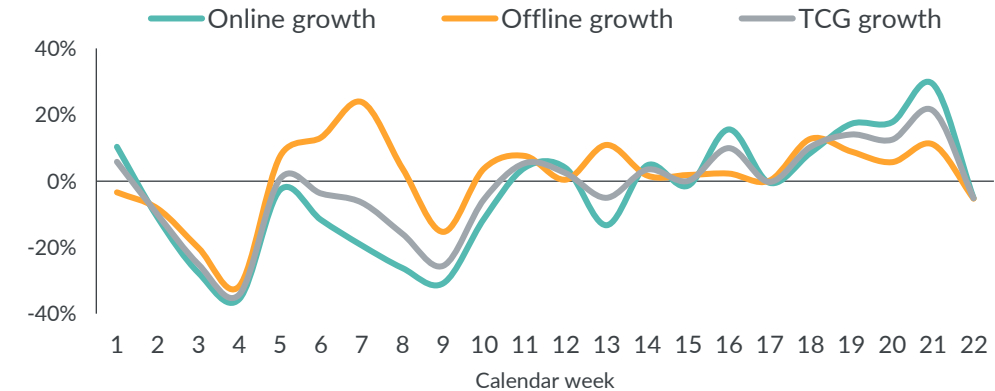


China

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 22 (May 29 – June 04)



- The 618 Shopping Festival started, but both online sales and traditional retail were weaker than in 2022, dropping by 5% as well as the total TCG market.
- Mobile computing declined by 4%. Smartphone sales experienced a minus of 12%.
- Refrigerator sales accelerated by 17% and washing machines were up 18%. TV sales posted a decline of 11%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 22 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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