



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 161
cw25/2023

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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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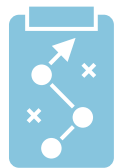
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Fact of the Week

As category sales decreased, special form factors and new technology defy the downward trend



About **gfknewron**

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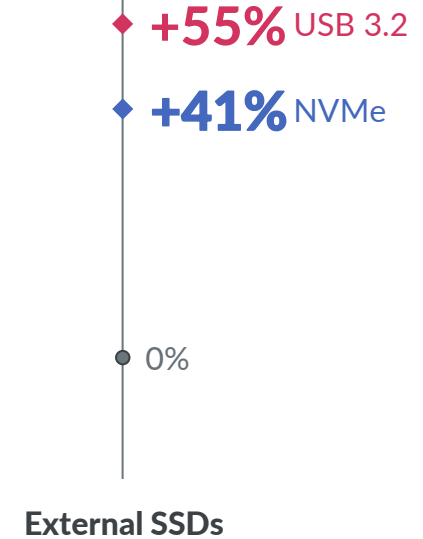
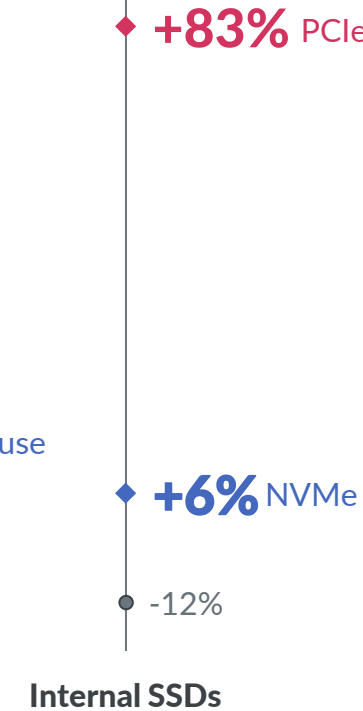
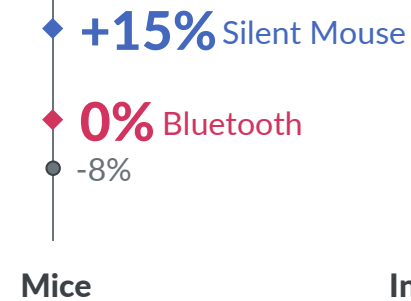
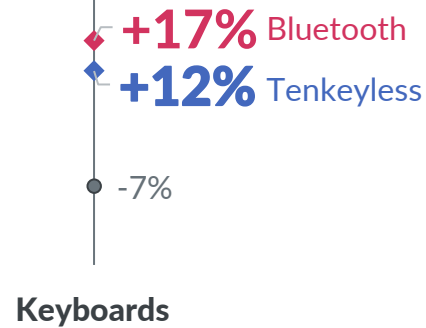
Spain

Russia

Japan

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Weekly retail insights from the Point of Sale

Spotlight on Germany



About **gfknewron**

Fact of the week

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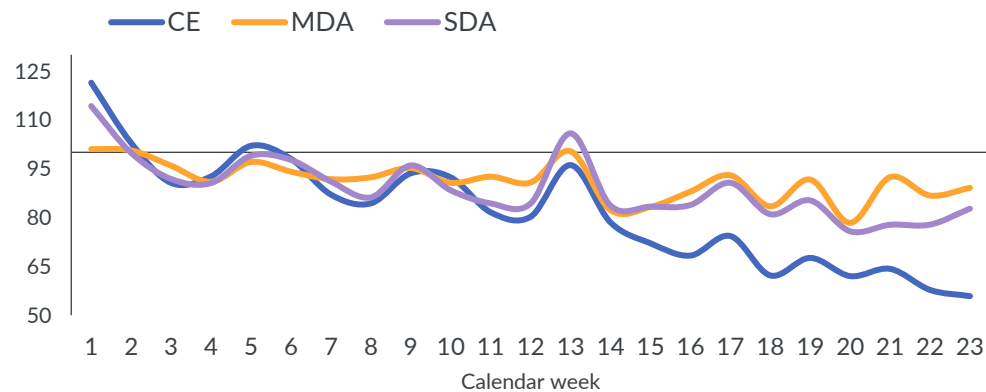
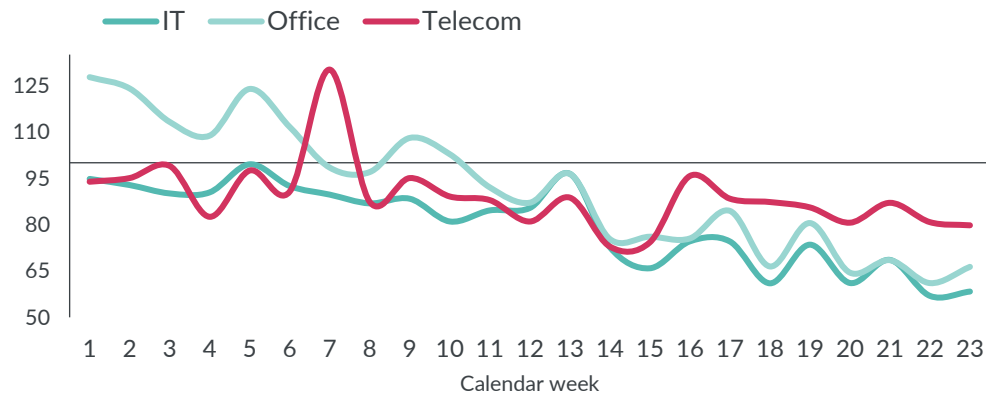
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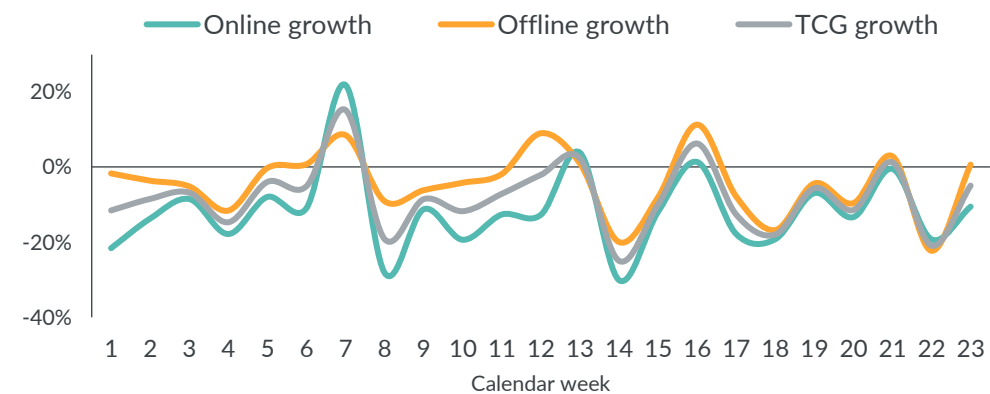
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 23 (June 05 – June 11)



- The total TCG market dropped by 5%, driven by online sales at -11%. Despite a good recovery, traditional retail (+1%) was unable to compensate.
- Most IT/Office products lost in double digits, led by desk computing at -22%. Monitors at -8% and media tablets at -7% were less negative. Laser printers accelerated at +13%. Smartphones were flat.
- There were negative trends for TVs (-25%), soundbars (-12%), and vacuum cleaners (-10%) and, to a lesser extent, for hot beverage makers (-3%) but all other MDA/SDA/CE products posted growth. Food preparation led this development at +60%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 23 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.

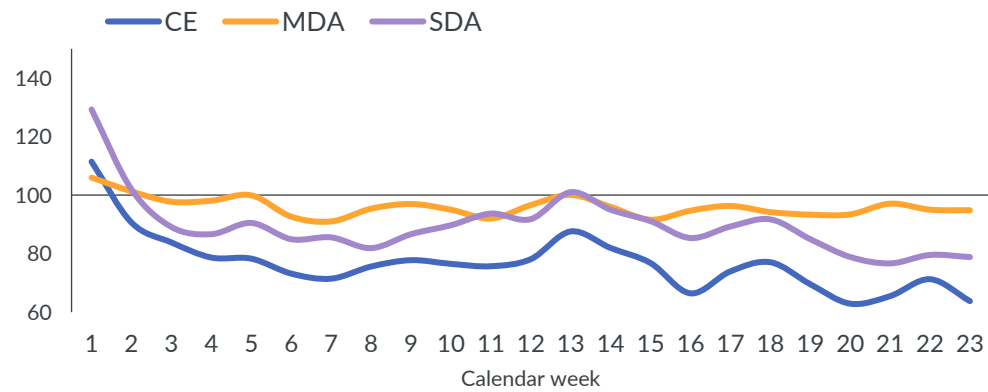
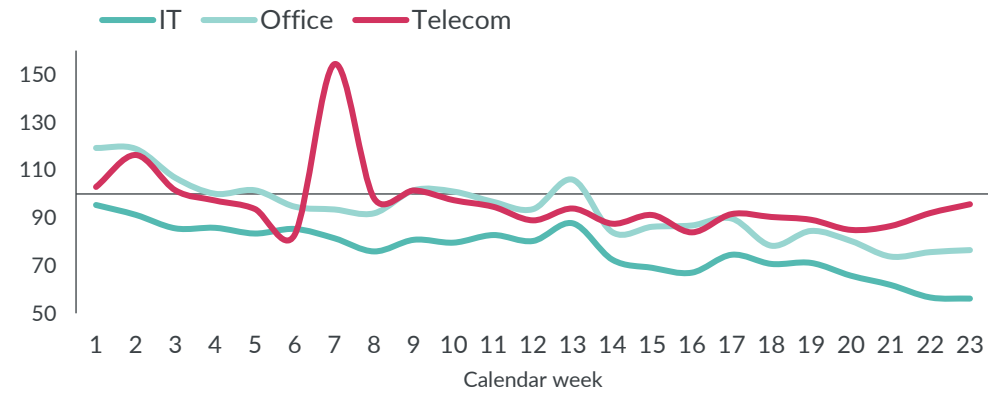
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

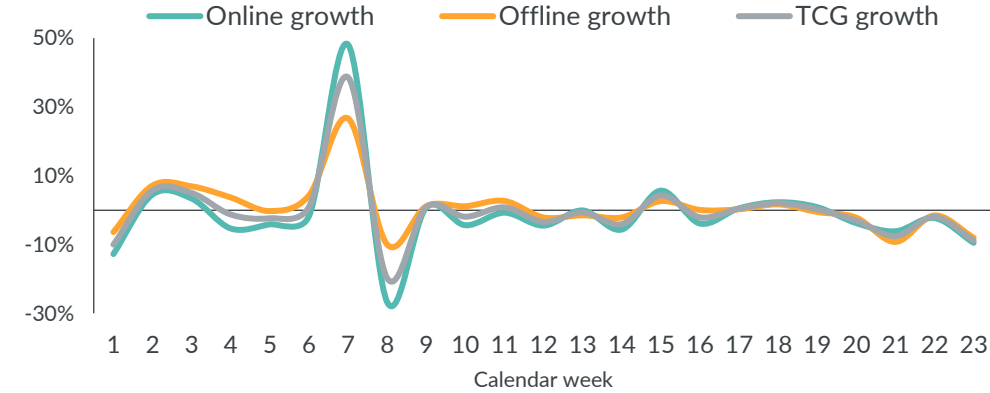


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 23 (June 05 – June 11)

- Similar rates of -8% for traditional retail and -9% for online sales dragged the total TCG market down by 9%.
- Except for laser printers at +20% and mice at -4%, all other IT/Office products lost in solid double digits, led by media tablets at -47% and desk computing at -37%. Smartphones and headsets were flat.
- Audio home systems (-29%) and TVs (-24%) declined in double digits, too, while soundbars were less impacted (-3%). Within MDA/SDA, shavers were the ray of light at +9%. Except for flat dental care and cooling, all other categories saw negative trends.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 23 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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Germany

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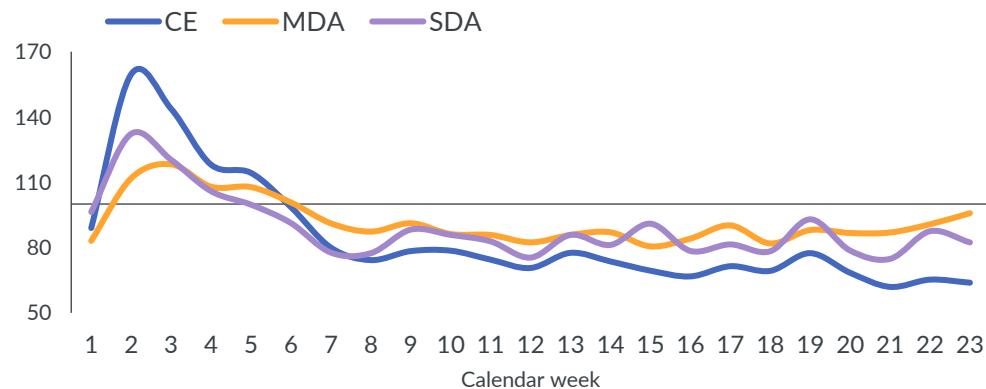
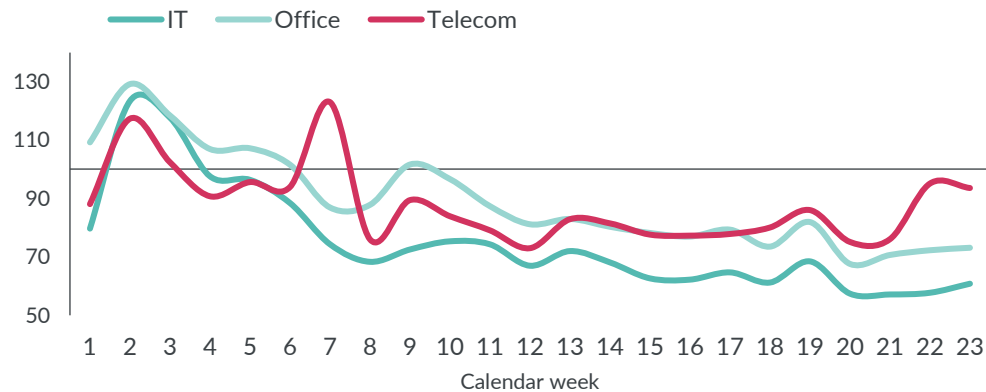
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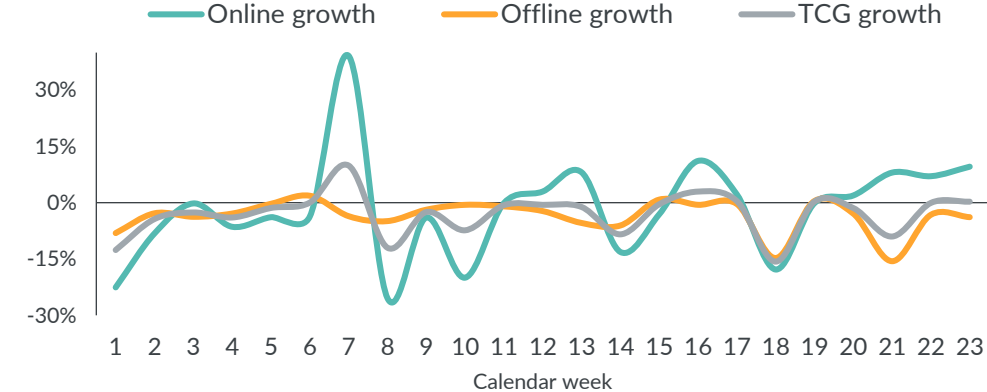
Brazil

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 23 (June 05 – June 11)



- Results of +10% for online sales and -4% for traditional retail delivered a flat total TCG market, the same result as week 22.
- Smartphones and headsets posted similar rates of +9% and +10%. While IT hardware posted negative trends of more than 20%, peripherals were less negative, and keyboards were flat. Laser printers were up 11%.
- Air treatment was the best-performing product group in week 23, accelerating at +172%. The other MDA/SDA categories delivered a mixed picture, ranging from +8% for dental care to -16% for food preparation. CE product groups delivered negative results with TV posting -11%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 23 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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Fact of the week

Germany

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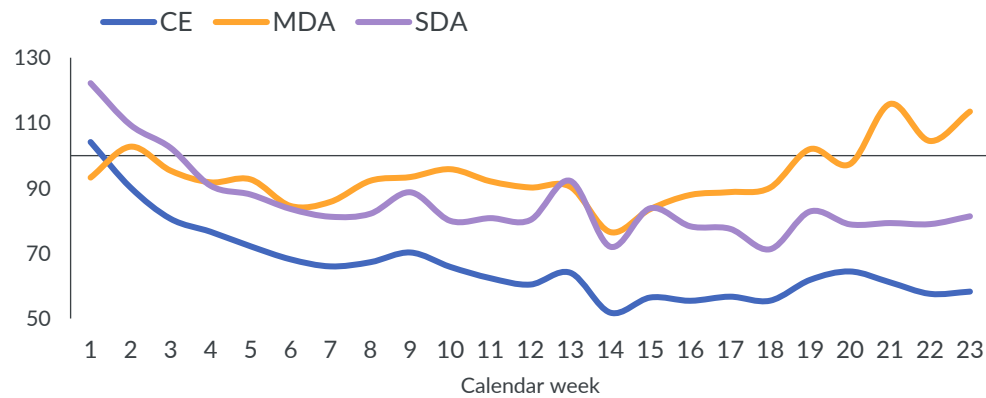
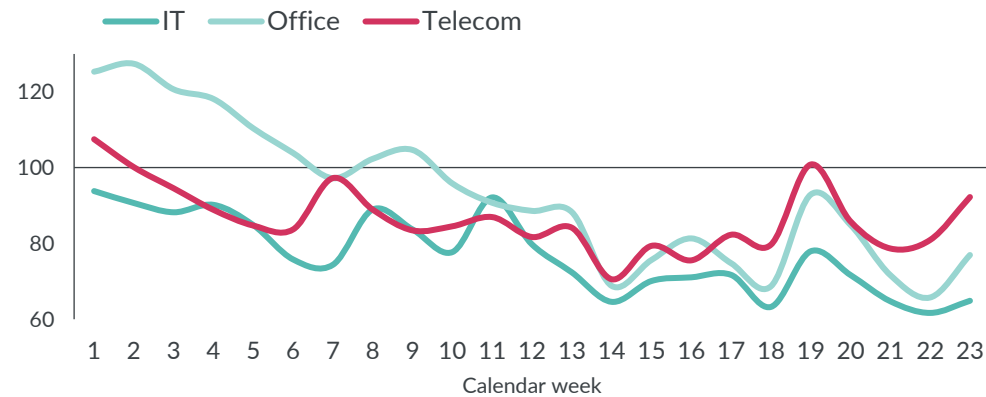
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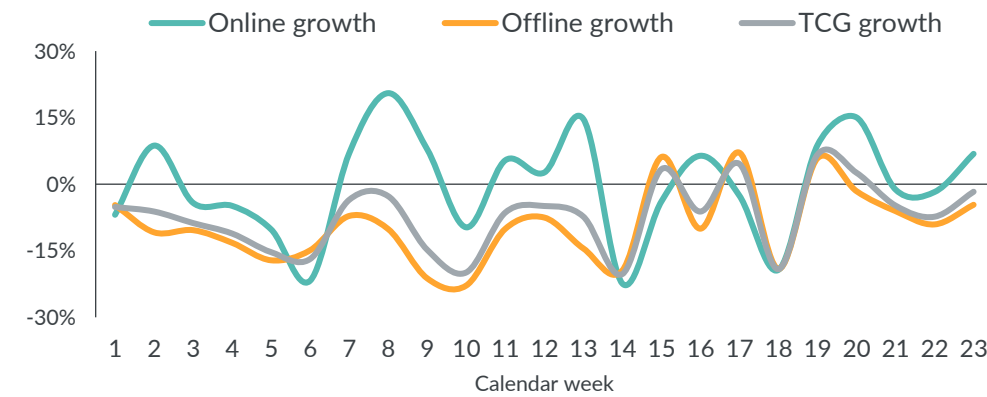
Brazil

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 23 (June 05 – June 11)



- Online sales experienced a plus of 7% versus week 23 in 2023, but this failed to compensate for the losses of traditional retail (-5%) and left the total TCG at a slight minus of 2%.
- While laser printers saw extraordinary growth of 54%, all other IT/Office categories presented negative trends. Smartphones accelerated at +10%.
- CE products lost in solid double digits with TVs posting -19%. MDA and SDA categories delivered a mixed picture, ranging from +17% for washing machines to -17% for air treatment.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 23 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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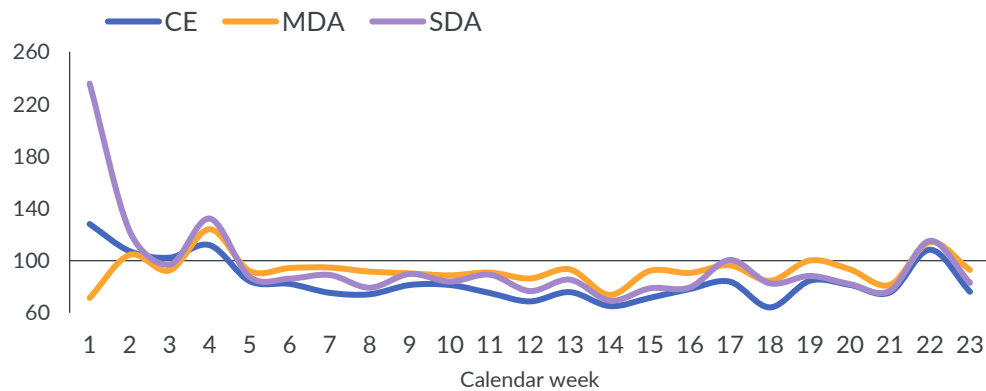
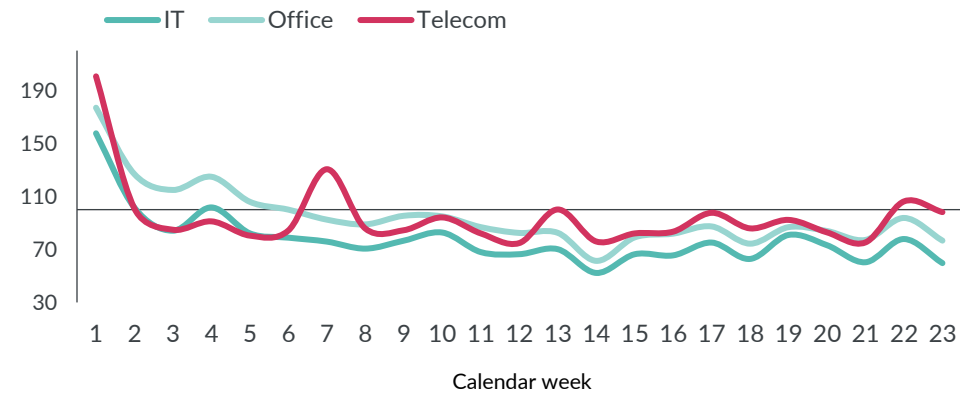
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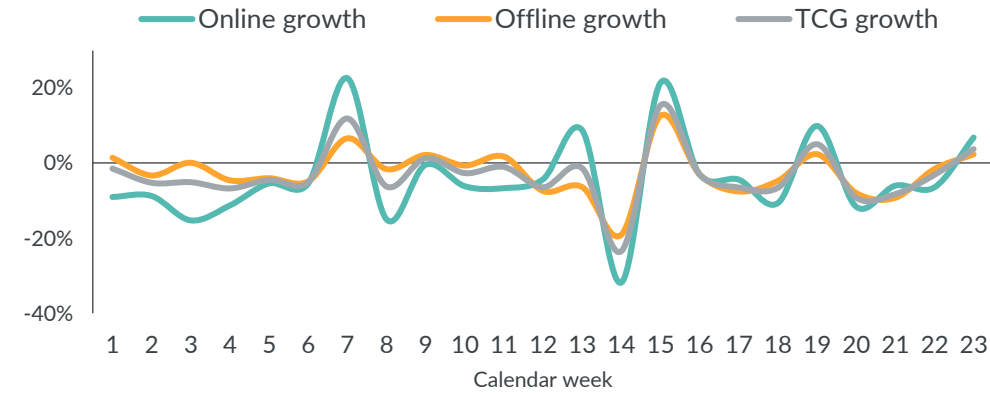
Brazil

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 23 (June 05 – June 11)



- Traditional retail posted a plus of 2% versus week 23 in 2022 and online sales were up by 7%, resulting in an upswing of the total TCG market of 4%.
- Except for laser printers at +20%, the other IT/Office product groups failed to perform well: desk computing and media tablets posted -15% and -14% respectively and inkjet printers and mobile computing were nearly flat.
- MDA/SDA/CE products posted a mixed picture with hot beverage makers in the lead at +23% and audio home systems bringing up the rear at -21%. TV sales were slightly down at -2%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 23 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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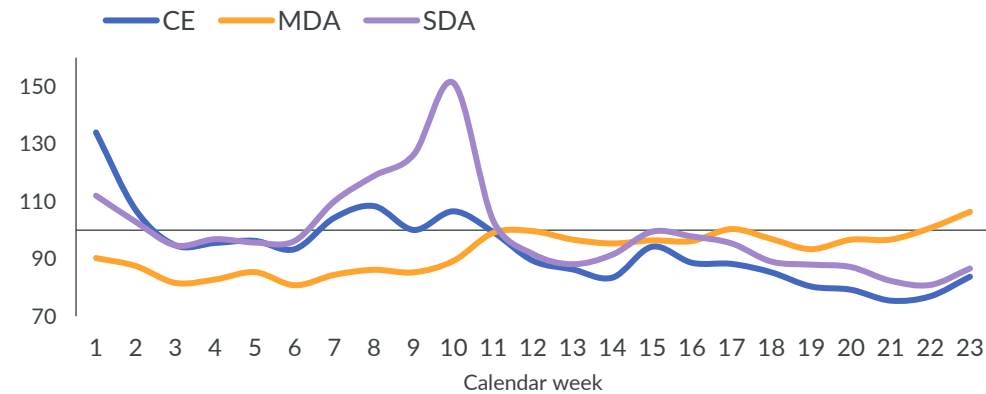
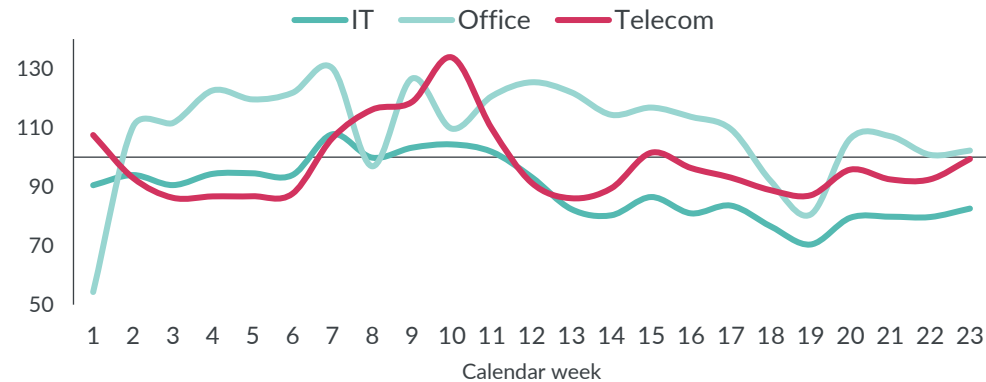
> Russia

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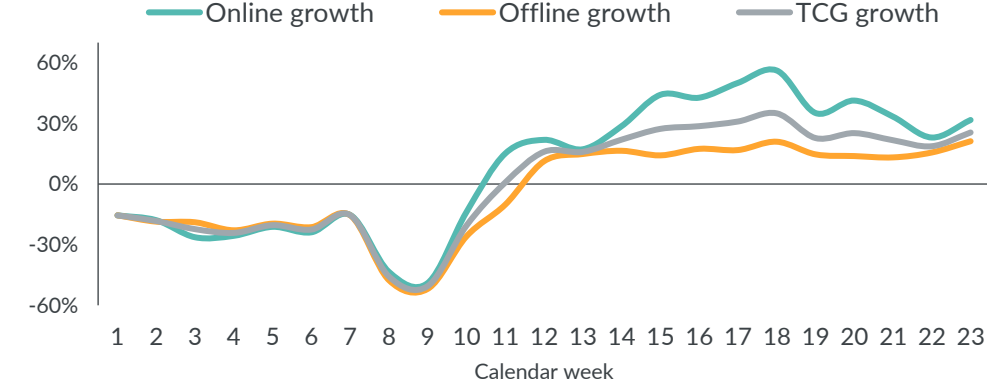
Brazil

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 23 (June 05 – June 11)



- The Russian TCG market continued its recovery, delivering +25% versus week 23 in 2022. Online sales at +32% were the driving force. Traditional retail added to it at +21%.
- Laser printers accelerated by 45% with inkjet printers up 39%. Most other IT/Office categories increased by double digits, except for desk computing at +3% and mobile computing at -1%. Smartphones increased by 32%.
- Cooling and washing machines delivered +27% and 31%. SDAs were weaker, with air treatment posting +43% and dental care down by 15%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 23 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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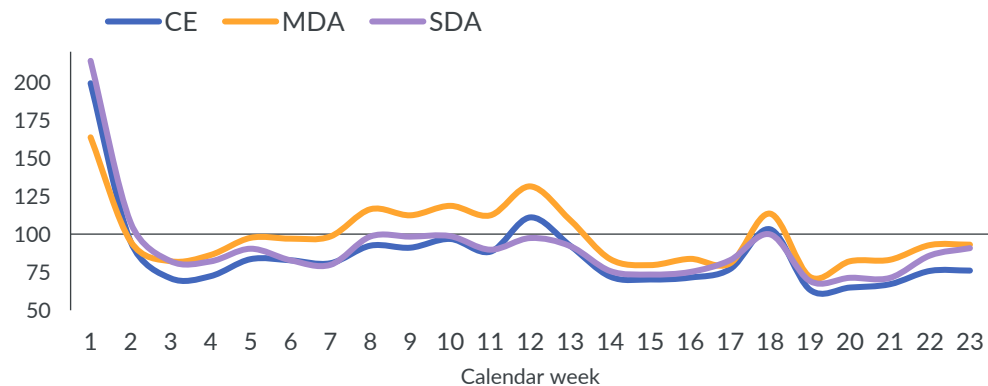
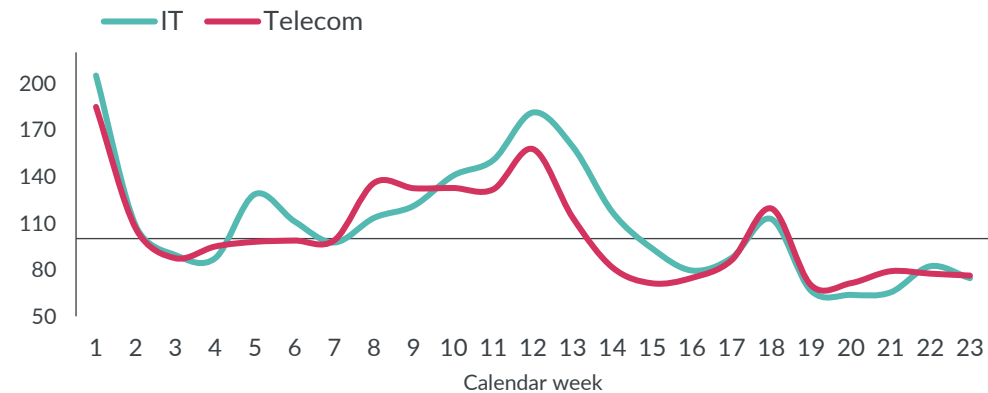
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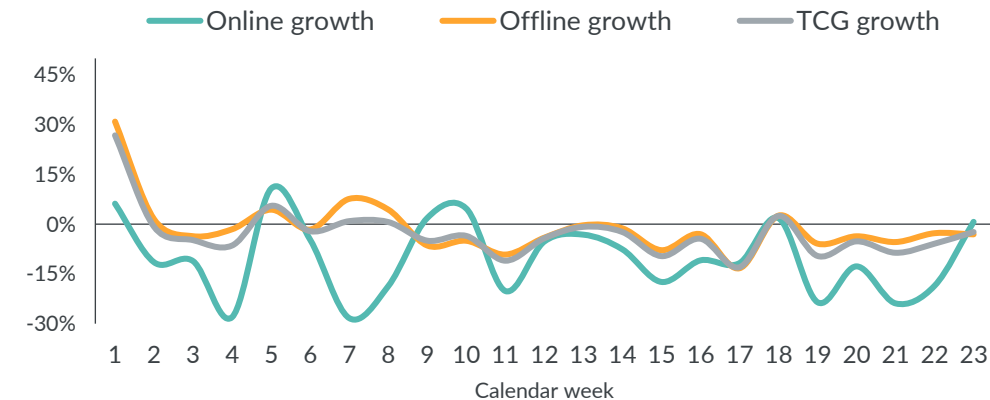
Brazil

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 23 (June 05 – June 11)



- Although online sales recovered from -19% in week 22 to +1% in week 23, this was not enough to compensate for the losses of traditional retail at -3% and led to a downswing of the total TCG market of 2%.
- The driver of this development was media tablets at -22% and mobile computing posting -18%. Smartphones were flat.
- Audio home systems at -23% also contributed to the weak TCG market. Good results for soundbars (+33%), shavers (+25%), and dental care (+14%) were unable to balance out the negative trend.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 23 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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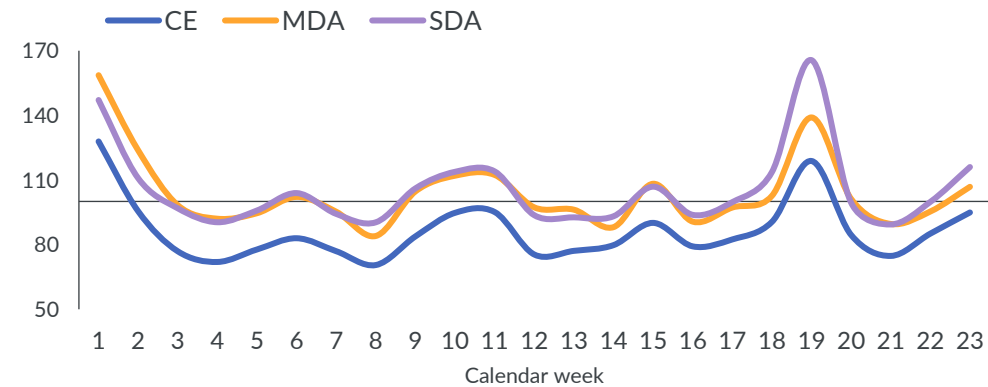
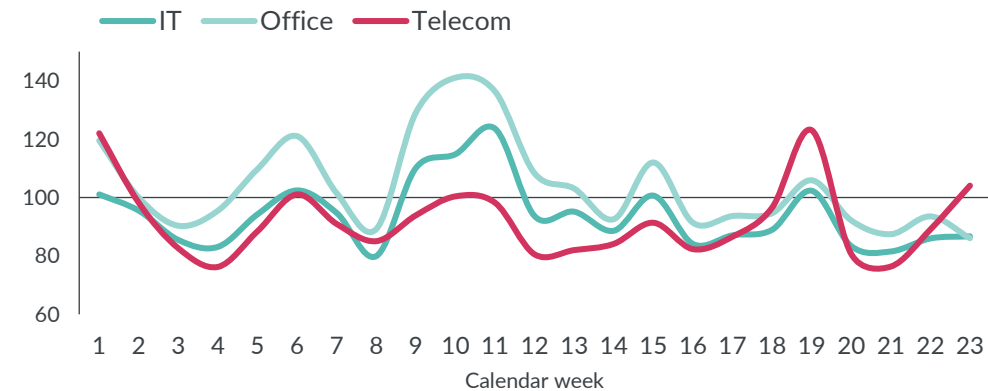
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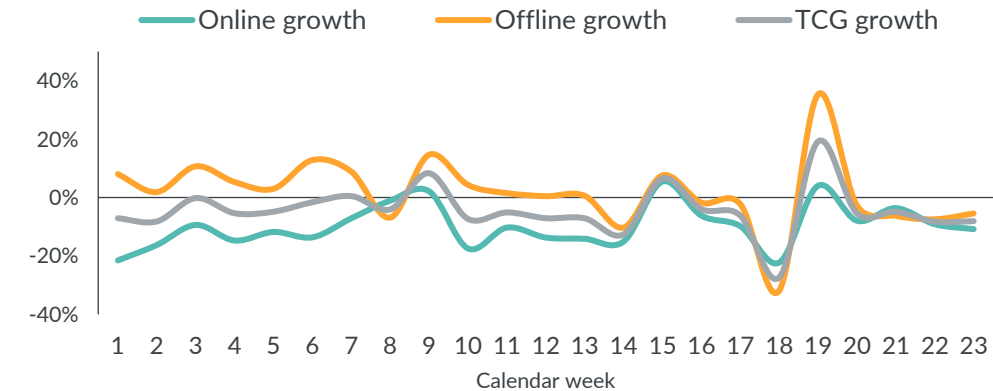
➤ Brazil

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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 23 (June 05 – June 11)



- Online sales delivered -11% (-9% the previous week) and traditional retail was down -5% (-7% the previous week), resulting in a downswing of the total TCG market of -8%.
- The rates for IT/Office products were mostly double-digit negative and ranged from -30% for laser printers to -16% for inkjet printers. Only media tablets delivered growth of 9%. Smartphones lagged at -11%.
- Hot beverage makers were the best-performing product group in week 23, at +23%. Vacuum cleaners posted +13%. TV sales were weak at -6%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 23 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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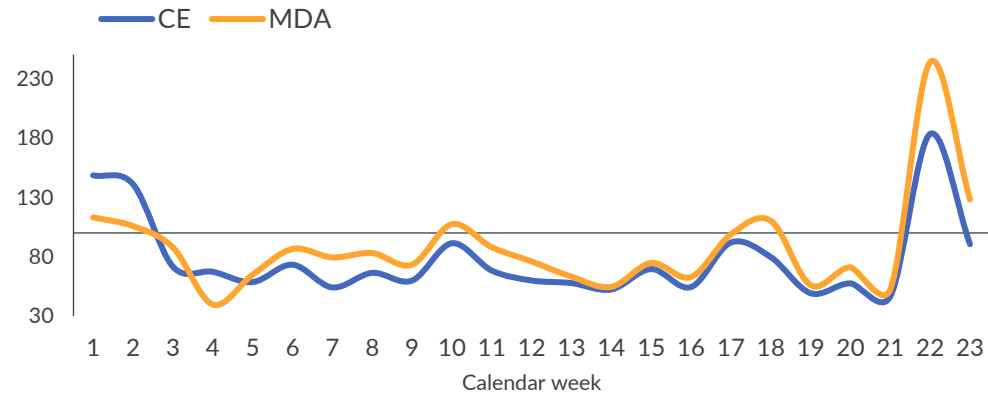
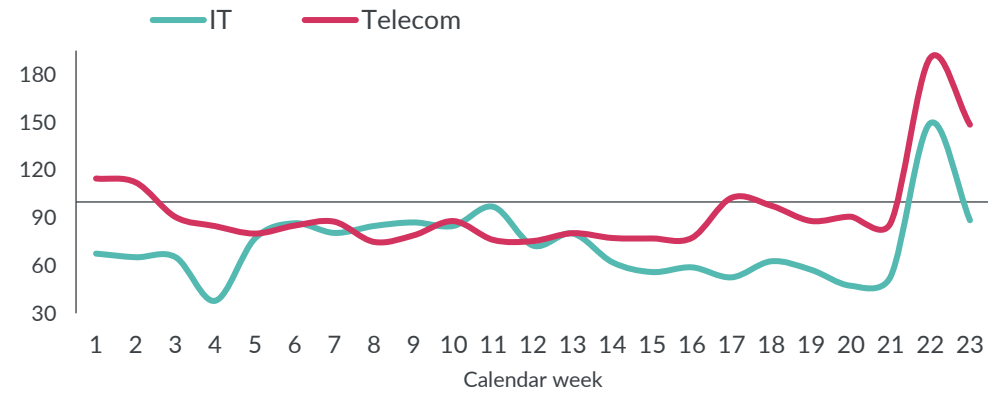
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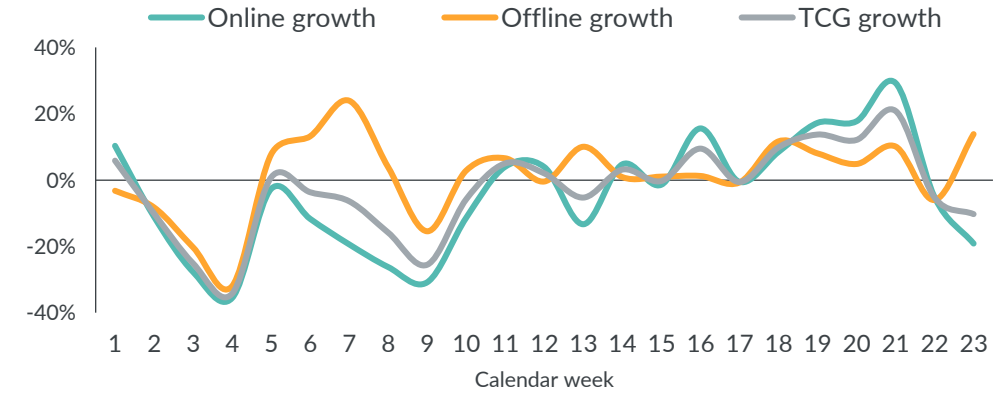
Brazil

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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 23 (June 05 – June 11)



- The recovery of traditional retail (+14%) failed to compensate for the losses of online sales (-19%) and left the total TCG at a minus of 10%.
- Mobile PCs decelerated at 9%. Smartphones delivered a minus of 13%.
- Week 23 in 2023 saw a slight increase for cooling (+2%) but declines for washing machines (-2%) and TV sales (-7%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 23 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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