



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 162

cw26/2023

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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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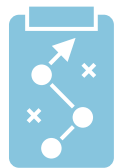
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➤ Fact of the week

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85
%

of global consumers have
attempted at least one of four
money-saving initiatives in the
past year

Weekly retail insights from the Point of Sale

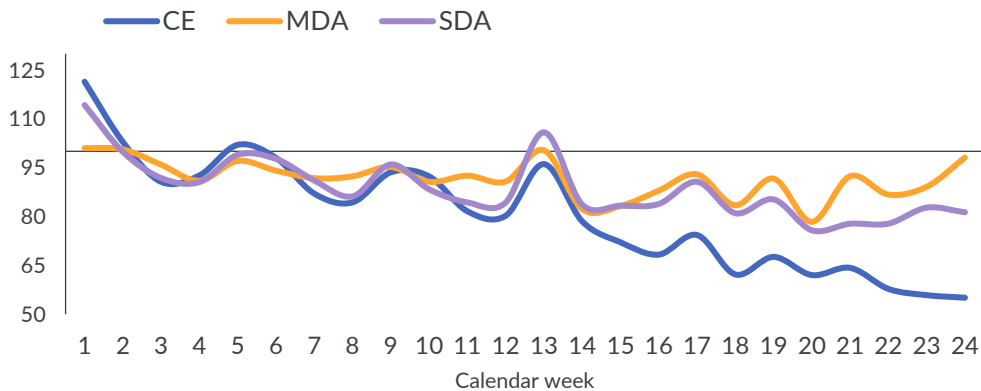
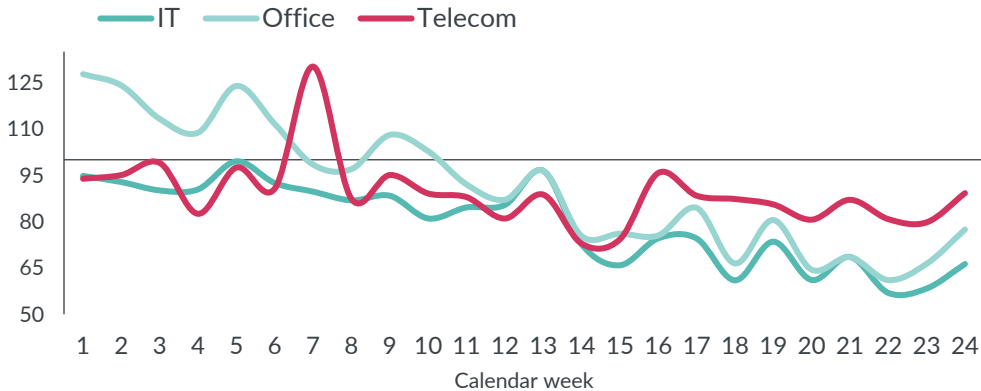
Spotlight on Germany



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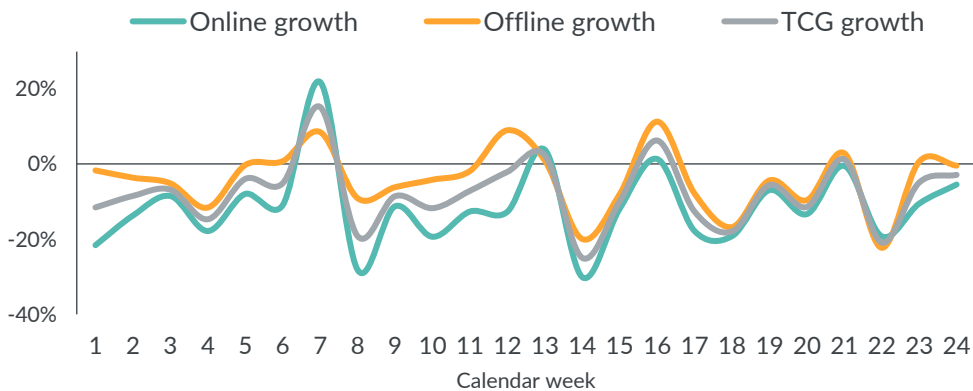
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 24 (June 12 – June 18)



- Online sales delivered -5%, and flat traditional retail failed to convert the total TCG market to positive growth, leaving it at -3%.
- Laser printers were the best-performing product group in week 24, at +47%. Mobile computing and desk computing declined by 13%. Inkjet printers and smartphones were flat.
- Except for vacuum cleaners at -1%, all other MDA/SDA categories saw positive trends, with food preparation in the lead at +20% and dental care posting +18%. TV sales decreased by 22% and soundbar sales fell by 26%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 24 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.

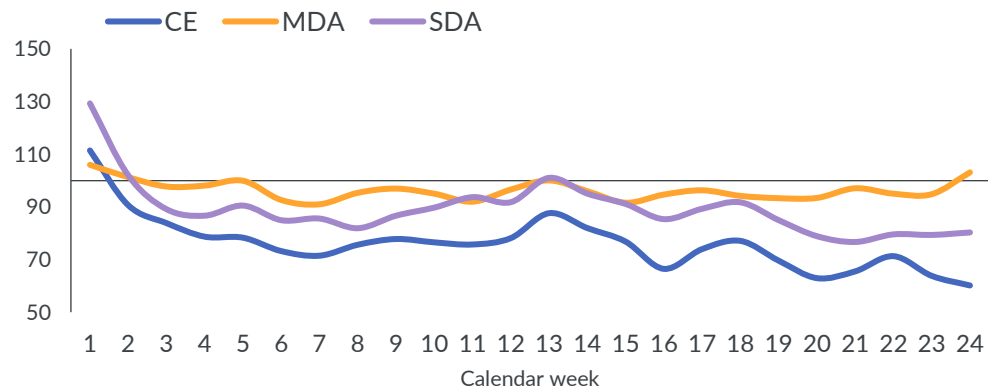
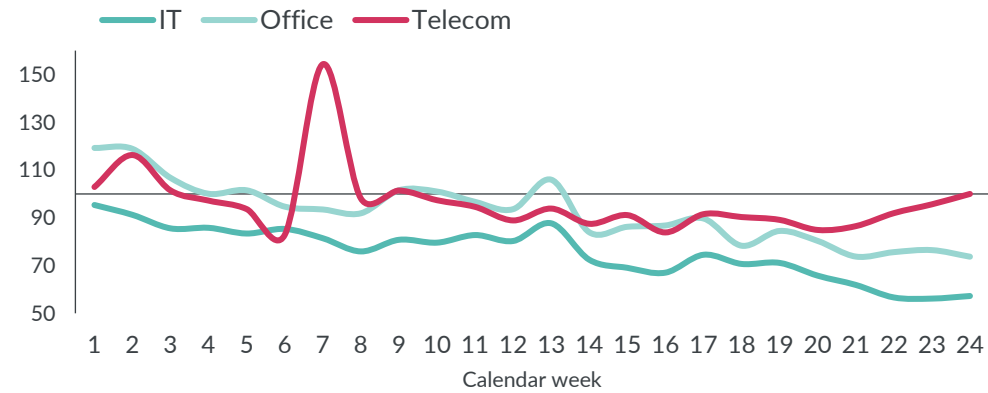
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

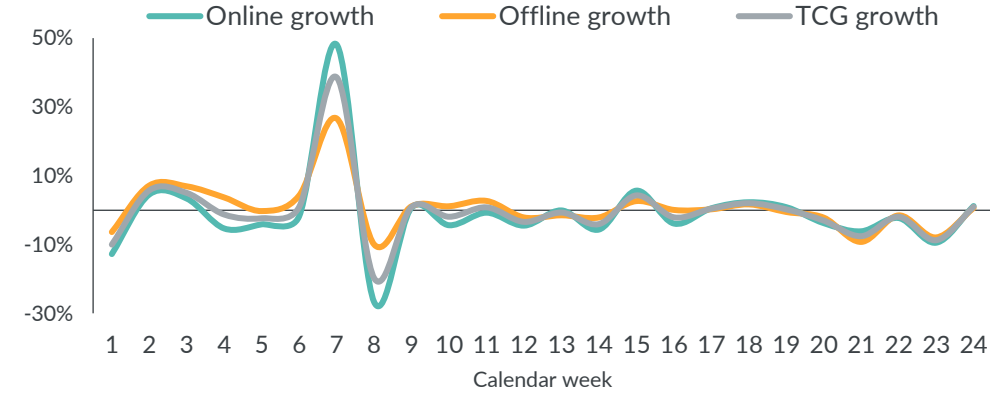


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 24 (June 12 – June 18)



- At an identical rate of +1%, both traditional retail and online sales retail lifted the total TCG market by 1%.
- Many IT/Office product groups lost in solid double digits. Peripherals and inkjet printers were less negative. Smartphones accelerated at +15%.
- CE products declined in double-digits, too, with TV sales losing 20%. The mixed picture for MDA/SDA categories saw cooling in the lead (+17%). Washing machines were flat. Dental care, food preparation, and hot beverage makers posted single-digit growth.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 24 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



About **gfknewron**

Fact of the week

Germany

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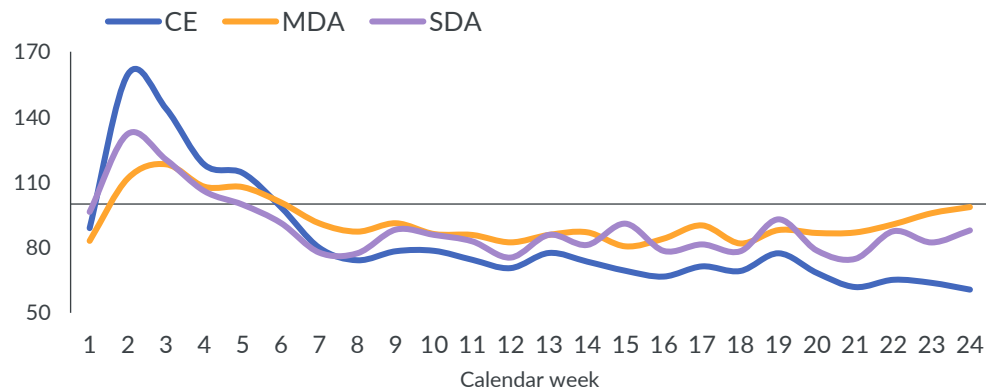
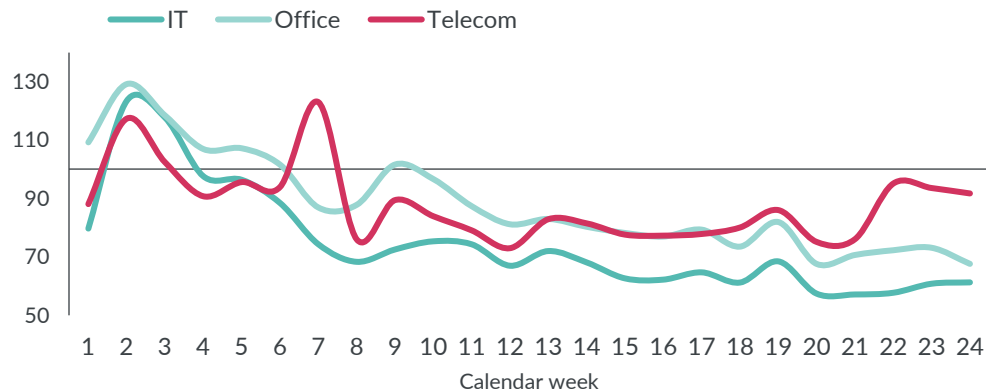
Russia

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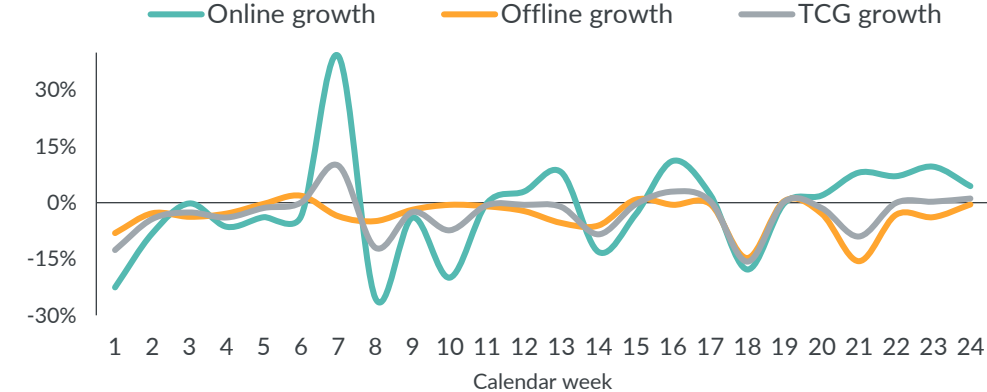
Brazil

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 24 (June 12 – June 18)



- Online sales delivered +4%. Combined with flat traditional retail, this delivered a slight upswing for the total TCG market of 1%.
- The mixed picture for IT/Office products ranged from -21% for desk computing to +14% for monitors and mice. Laser printers were flat. Smartphones increased by 5% and headsets by 13%.
- CE products posted negative trends overall with flat TV sales, soundbars at -15%, and audio home systems at -24%. Except for air treatment at -36% and food preparation at -8%, MDAs and SDAs delivered growth, although demand was close to flat for hot beverage makers and shavers.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 24 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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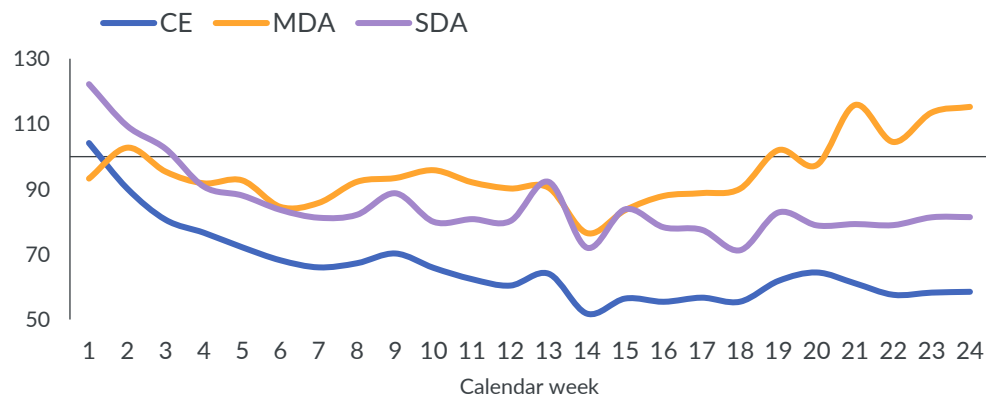
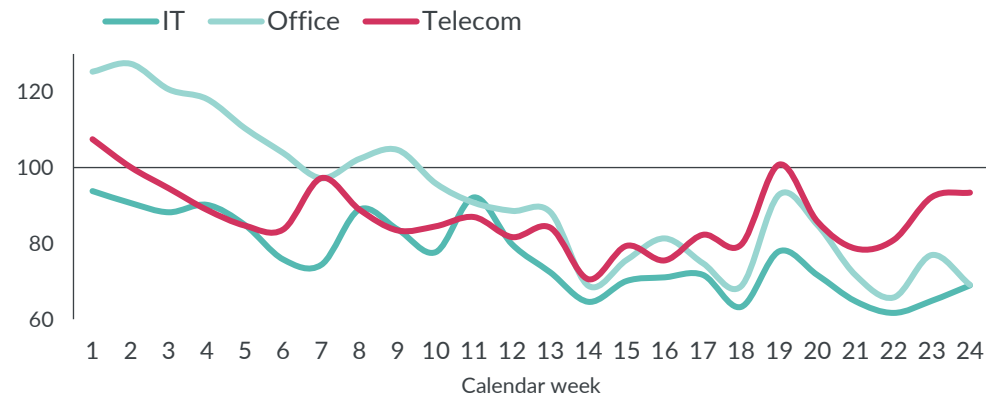
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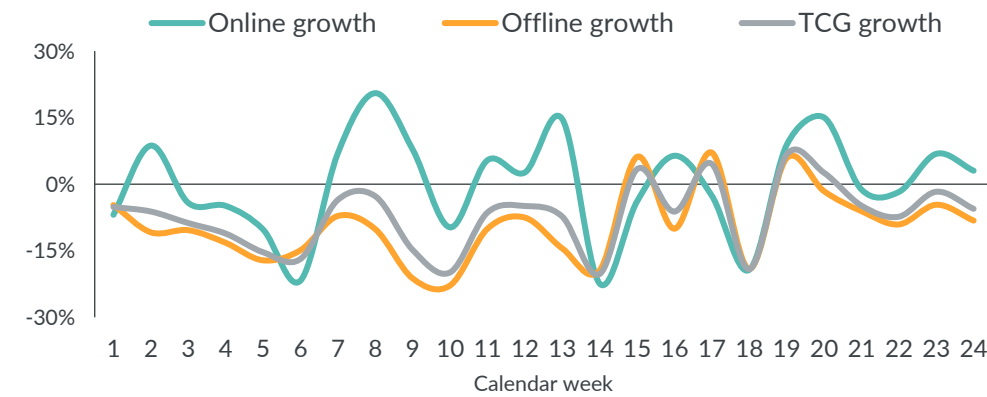
Brazil

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 24 (June 12 – June 18)



- Online sales experienced a plus of 3% versus week 24 in 2023, but this failed to compensate for the losses of traditional retail (-8%) and left the total TCG at a minus of 6%.
- IT/Office product groups delivered a mixed picture with laser printers in the lead at +35%. Mobile computing and inkjet printers declined by 14%. Smartphones posted a small increase of 1%.
- Air treatment was the worst-performing product group in week 24 at -56%. Other MDAs/SDAs delivered a mixed picture, ranging from +15% to -7%. CE products lost in solid double digits with TVs posting -24%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 24 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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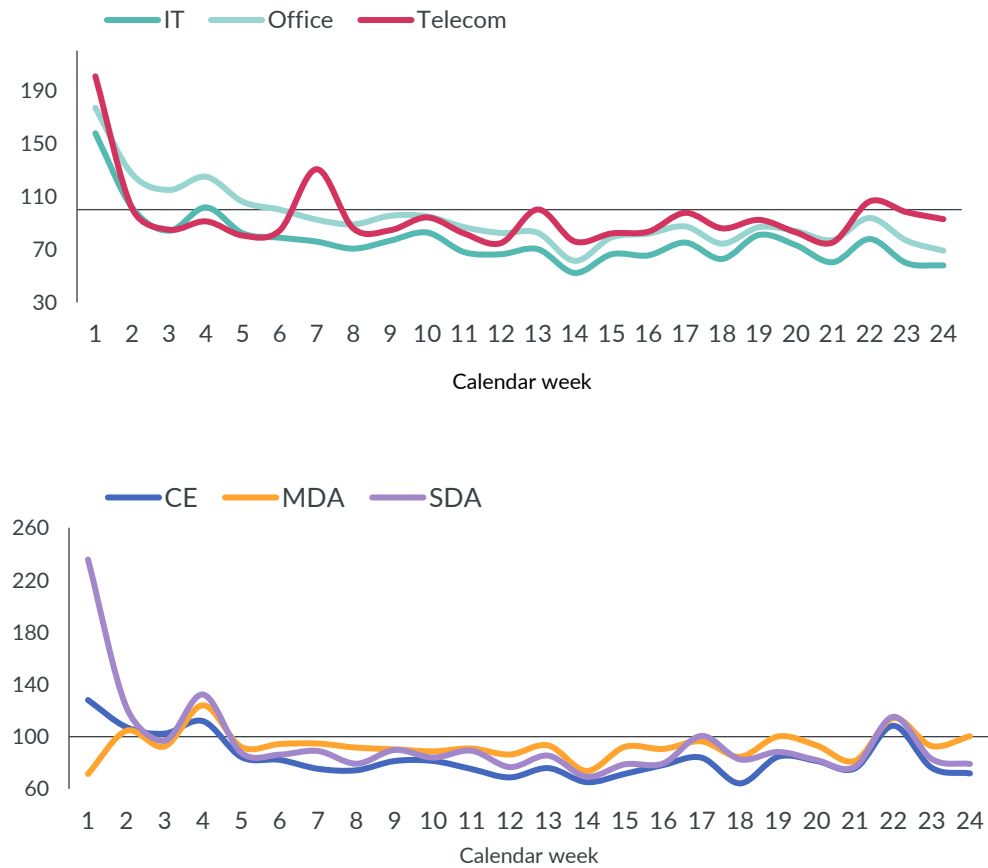
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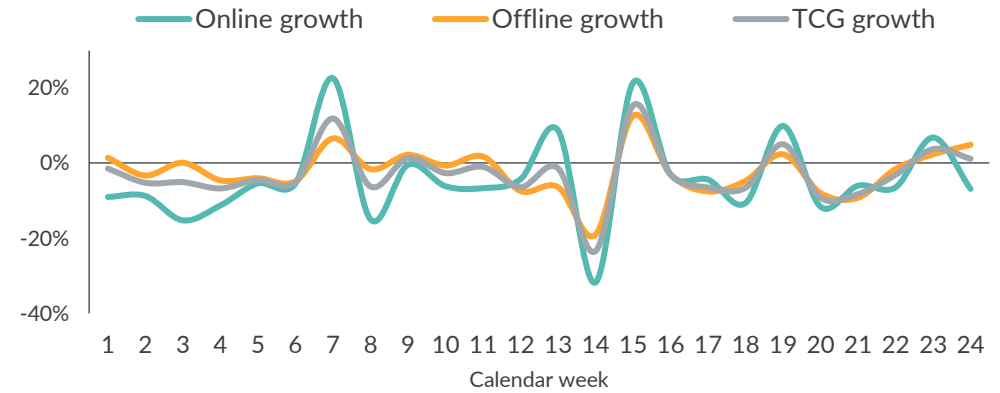
Brazil

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 24 (June 12 – June 18)



- At +5%, traditional retail compensated for the losses of online sales (-7%), resulting in a slight upswing for the total TCG market of 1%.
- Desktop computing (-23%) was the worst-performing product group among IT/Office products. Media tablets lagged at -9%. Laser printers at +18% were the only positive category. Smartphones accelerated at +19%.
- Except for cooling at -18%, MDA and SDA products posted positive trends with hot beverage makers in the lead at +24%. TV sales witnessed -6% and soundbars posted +4%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 24 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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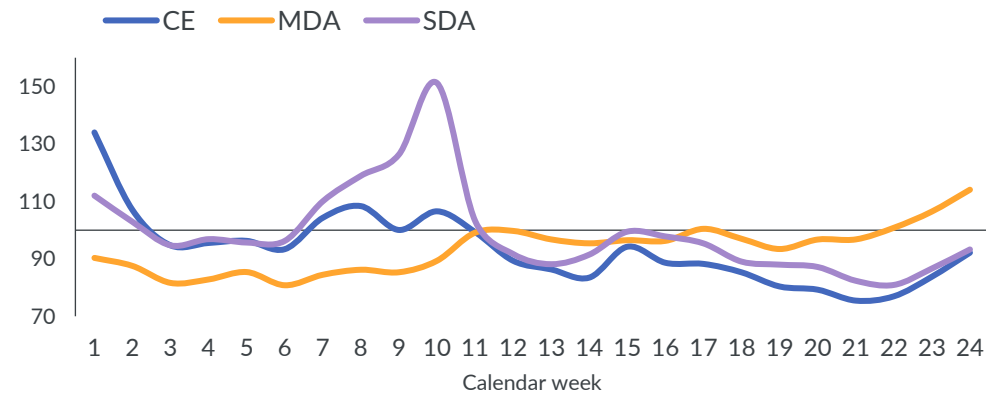
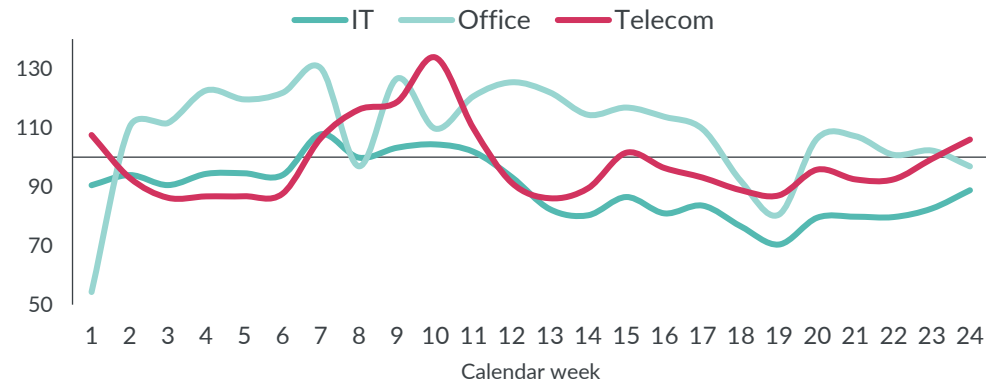
> Russia

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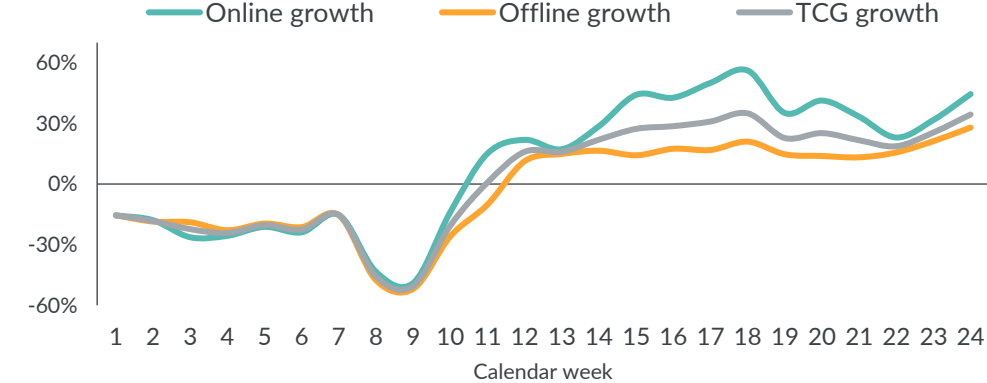
Brazil

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 24 (June 12 – June 18)



- The Russian TCG market continued its recovery, delivering +34% versus week 24 in 2022. Online sales at +45% were the driving force. Traditional retail added to it at +28%.
- Nearly all IT/Office and telecom categories accelerated by 30% or more, with media tablets out in front at +65%. Only desk computing was a little weaker at +8%.
- Audio home systems (+76%) and air treatment (+62%) delivered the highest growth rates. Dental care was the weakest category at +10%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 24 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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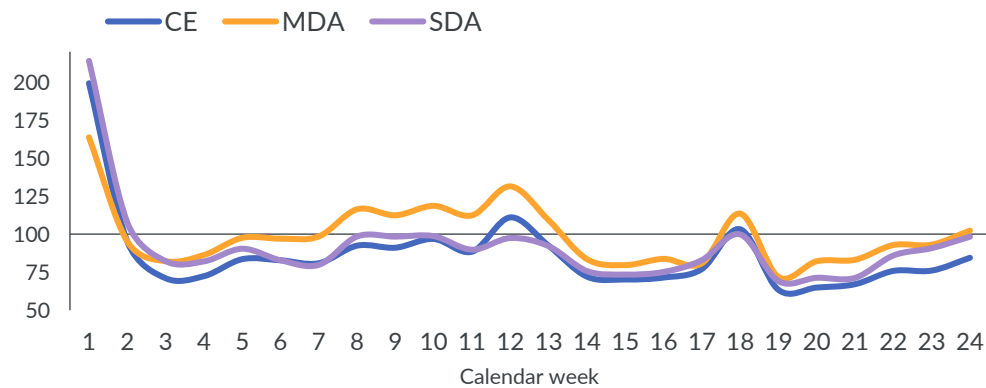
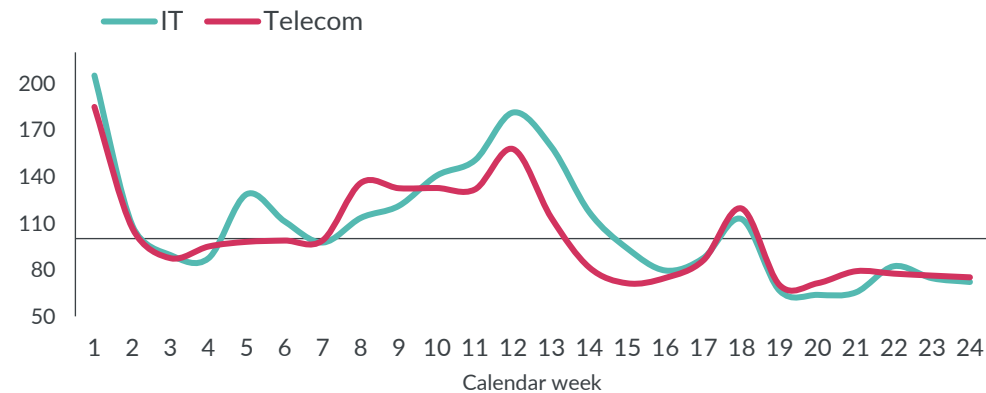
Russia

➤ Japan

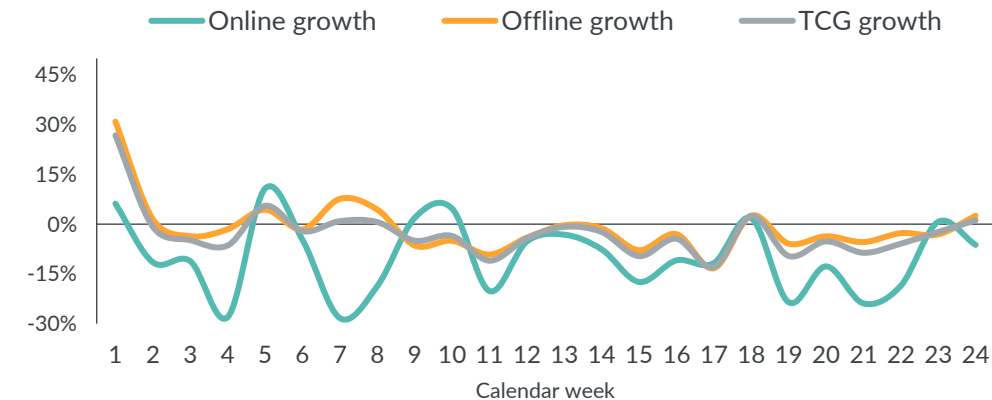
Brazil

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 24 (June 12 – June 18)



- At +3%, traditional retail compensated for the losses of online sales (-6%), resulting in a slight upswing of the total TCG market of 1%.
- Media tablets slumped at -36% while mobile computing performed better, but still lost 4%. Smartphones were flat at -0.5%. Headsets delivered +4%.
- While – except for soundbars at +21% – CE products witnessed negative trends with TVs posting -7%, MDA and SDA categories were positive with air treatment posting +21% and food preparation bringing up the rear at -11%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 24 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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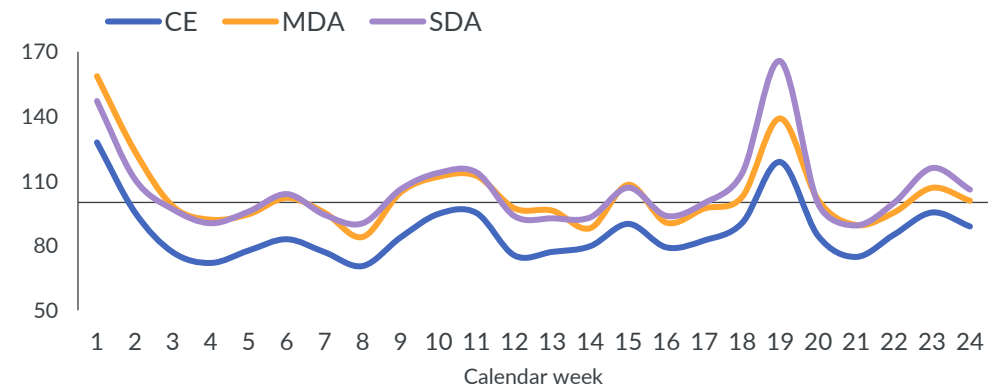
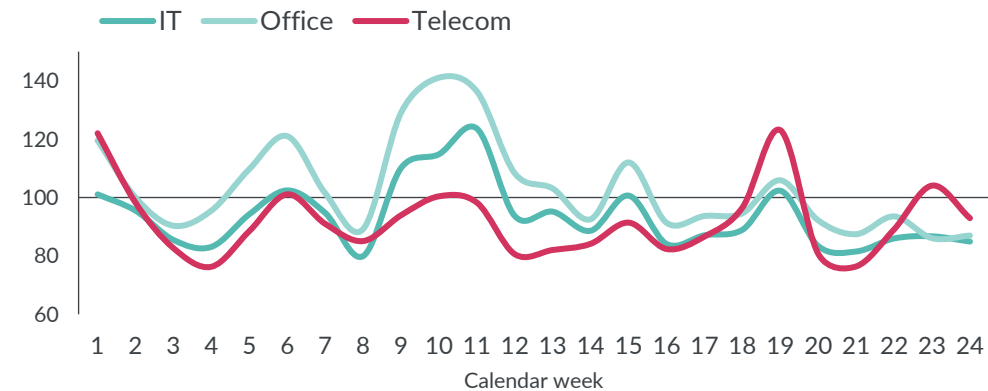
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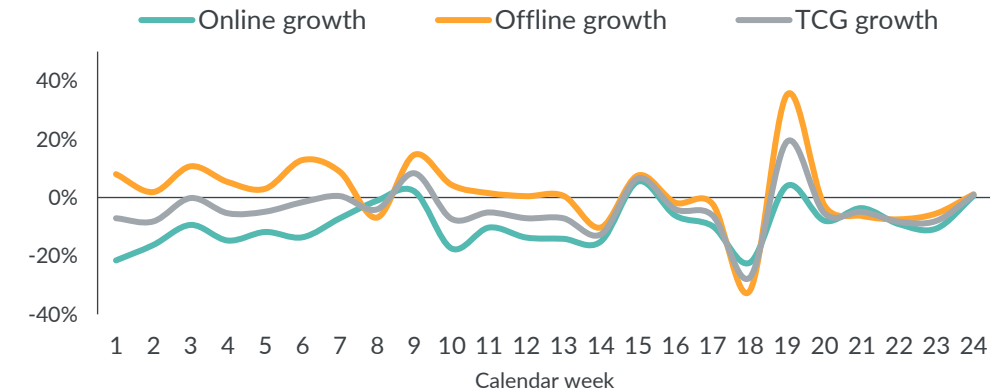
➤ Brazil

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 24 (June 12 – June 18)



- At an identical rate of +1%, both traditional retail and online sales retail lifted the total TCG market by 1%.
- The rates for IT/Office products ranged from -8% for mobile computing to +31% for media tablets. Desk computing was flat. Smartphones increased by 3%.
- The overall positive picture for MDA and SDA product groups delivered double-digit growth for hot beverage makers (+51%), shavers (+27%), and vacuum cleaners (+15%). Cooling was flat. TV sales experienced a downswing of 4%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 24 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

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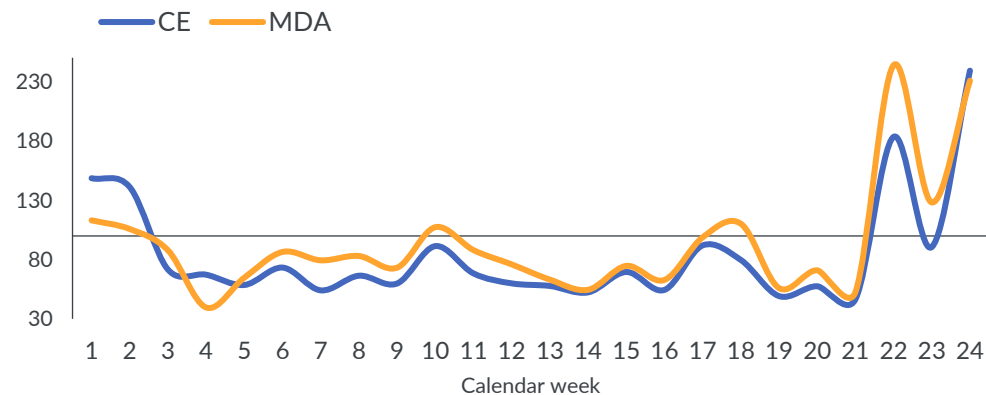
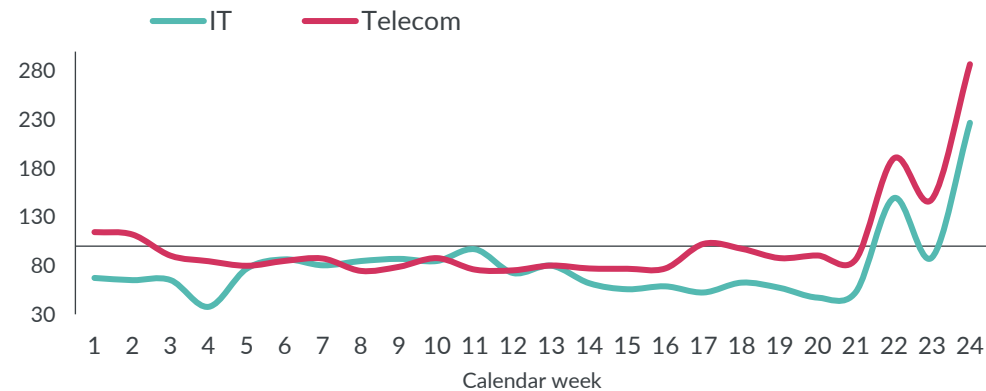
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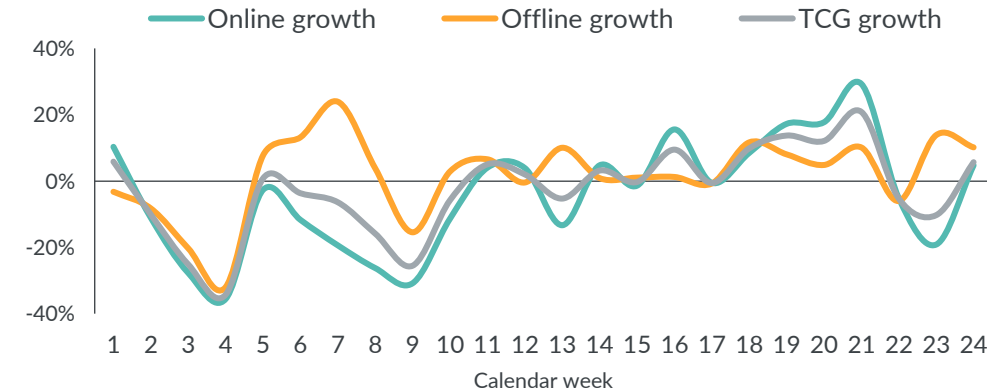
Brazil

> 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 24 (June 12 – June 18)



- After a drop in week 23, online sales experienced recovery and posted +5% in 618 Shopping Festival-week. Combined with +10% for traditional retail, this led to an uplift of 6% for the total TCG market.
- Mobile PCs strongly decelerated at -32%. Smartphones delivered a plus of 22%.
- Week 24 in 2023 saw single-digit decreases for TV sales (-8%), washing machines (-8%) and cooling (-6%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 24 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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