



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 163

cw27/2023

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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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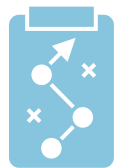
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Fact of the Week

Particularly built-in categories reached higher levels of demand.
Those markets particularly decelerate in 2023



About **gfknewron**

USD (NSP) value growth % | 2023 vs 2022 resp. 2023 vs 2019 | Jan - Mar

> Fact of the week

Germany

Great Britain

France

Italy

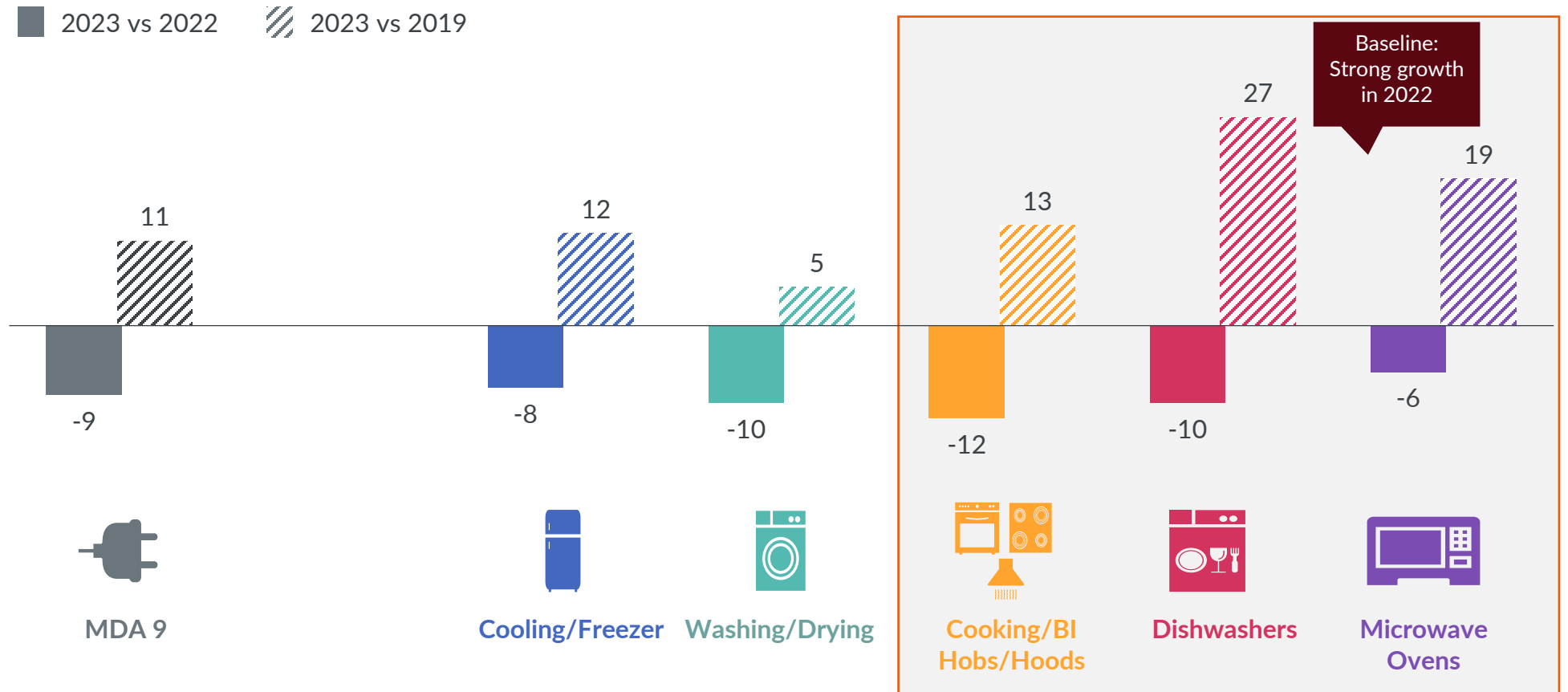
Spain

Russia

Japan

Brazil

China



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.

About **gfknewron**

Fact of the week

> Germany

Great Britain

France

Italy

Spain

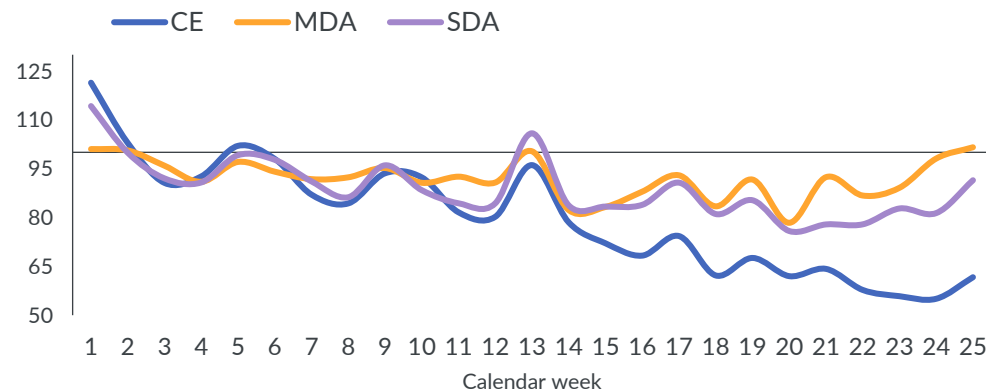
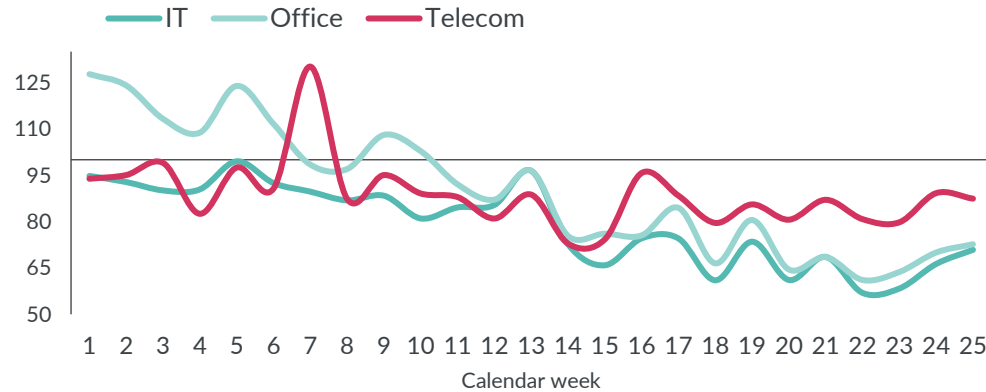
Russia

Japan

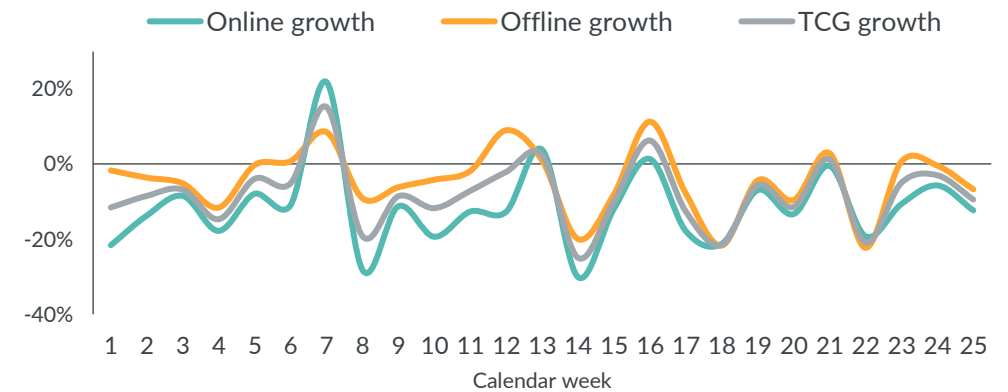
Brazil

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 25 (June 19 – June 25)



- The total TCG market dropped by 9%, driven by online sales at -12%. Traditional retail declined by 7%.
- Except for laser printers at +40%, IT products posted negative trends, led by desk computing at -16%. Monitors at -5% were hit least. Smartphones slumped at -15%.
- While soundbars and TV sales again declined in double-digits, audio home systems decreased by just 5%. Cooling fell by 9% and washing machines were flat. SDA products overall were positive with vacuum cleaners and air treatment out in front at +22%.

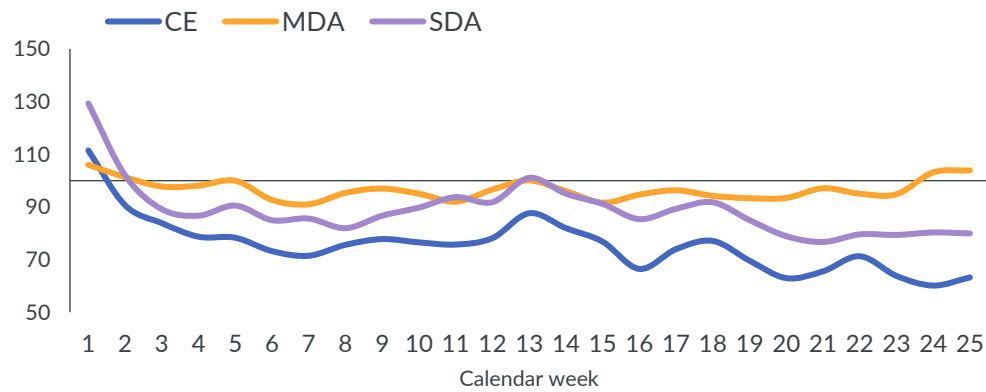
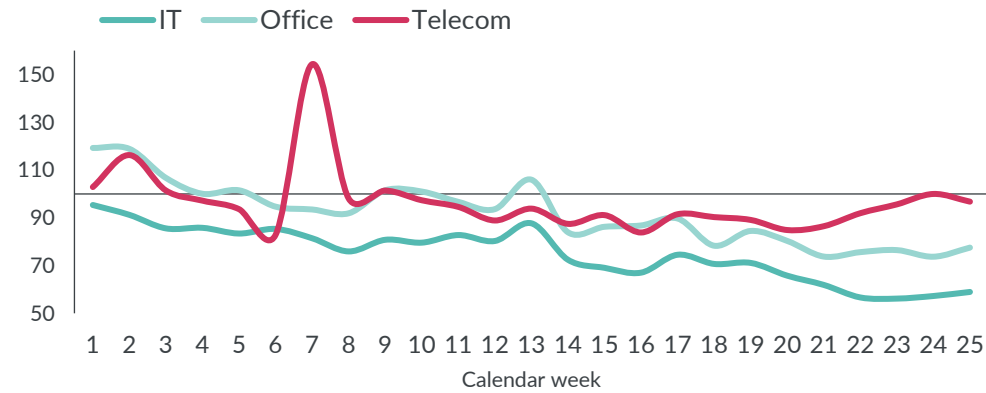
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

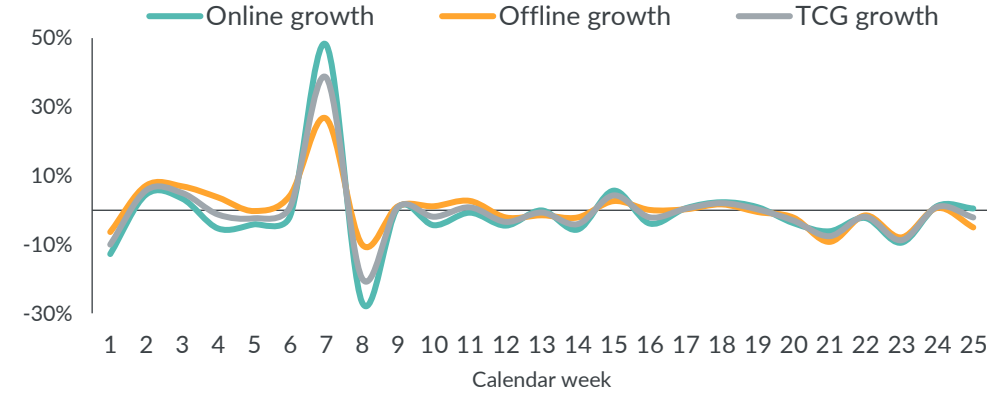


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (June 19 – June 25)

- Deceleration of traditional retail (-5%) dragged the total TCG market down by 2%. Flat online sales was unable to compensate for the losses.
- Laser printers were the best-performing product group in week 25, at +6%. Except for flat keyboards, all other IT/Office categories posted negative trends with media tablets in the lead at -36%. Smartphones gained 9%.
- CE products declined in double-digits, with TV sales losing 21%. The mixed picture for MDA/SDA categories saw dental care and vacuum cleaners in the lead, each posting +10%. Washing machines were stable compared to the same week last year.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 25 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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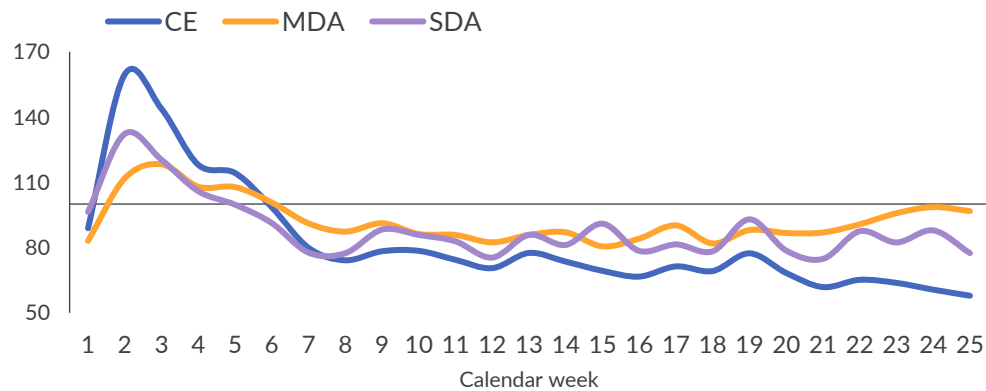
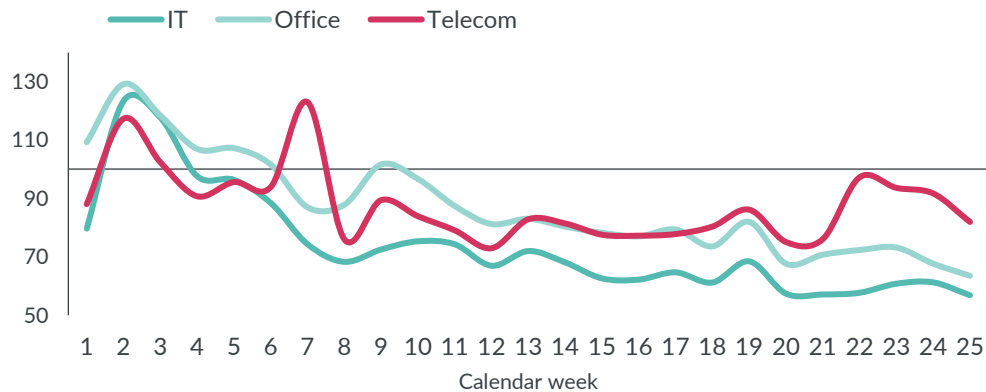
Russia

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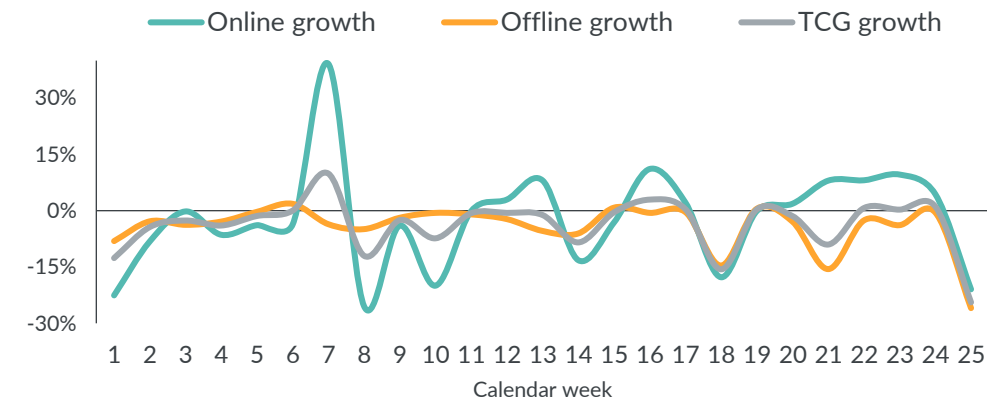
Brazil

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 25 (June 19 – June 25)

- Strong deceleration for online sales (-21%) and traditional retail (-26%) dragged the total TCG market down by 24%.
- IT/Office products posted negative trends, ranging from -42% for mobile computing to -5% for mice. Laser printers were up 3%. Both smartphones and headsets slumped at -14%.
- MDA/SDA/CE delivered severe double-digit losses with CE categories hit the most with declines of more than 30% (TV posting -39%). Air treatment was the only positive product group with an increase of 32%.



Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 25 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

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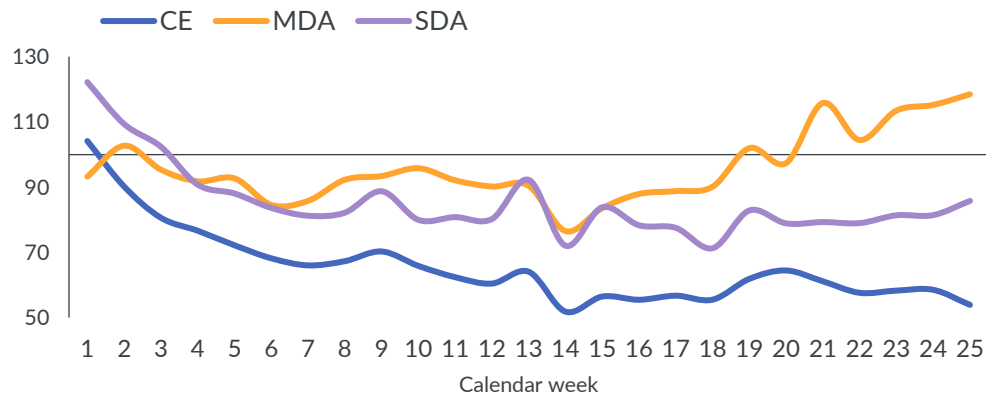
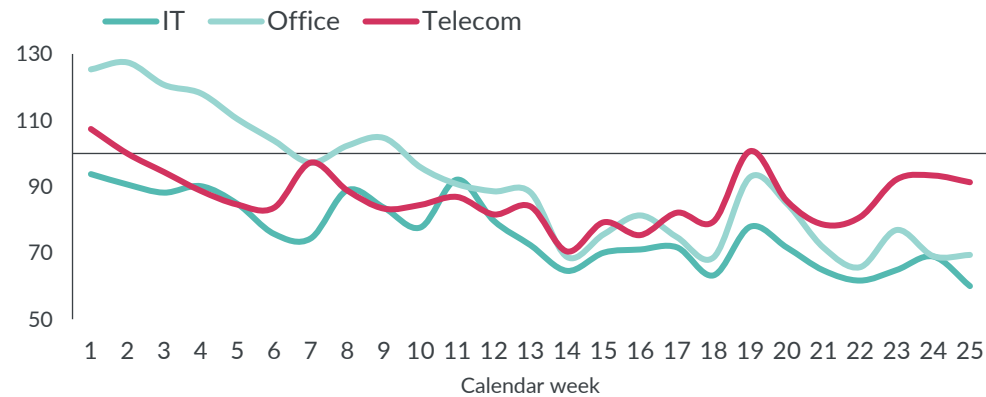
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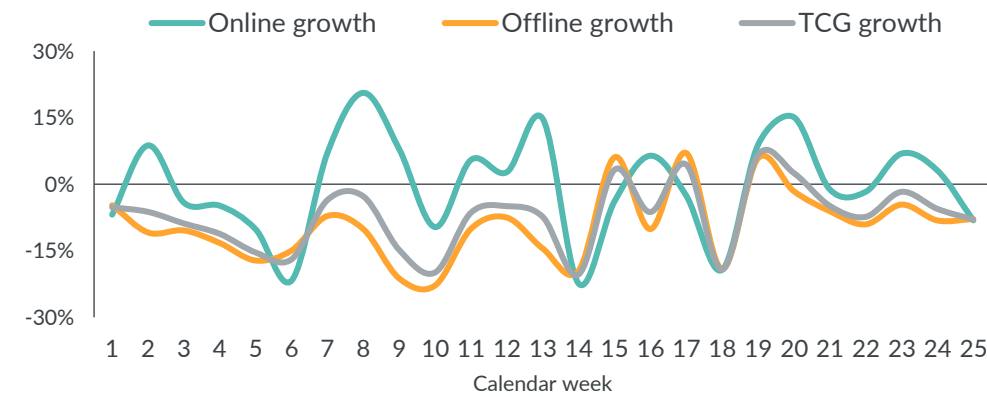
Brazil

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 25 (June 19 – June 25)



- At an identical rate of -8%, both traditional retail and online sales retail dragged the total TCG market down by 8%.
- Except for media tablets at +45%, all other IT/Office products decreased, led by mobile computing at -25%. Smartphones lagged at -7%.
- While CE products lost in solid double digits (TVs posting -21%), MDA and SDA categories delivered a mixed picture with growth for air treatment (+10%) and washing machines (+13%) and losses for dental care (-20%).

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 25 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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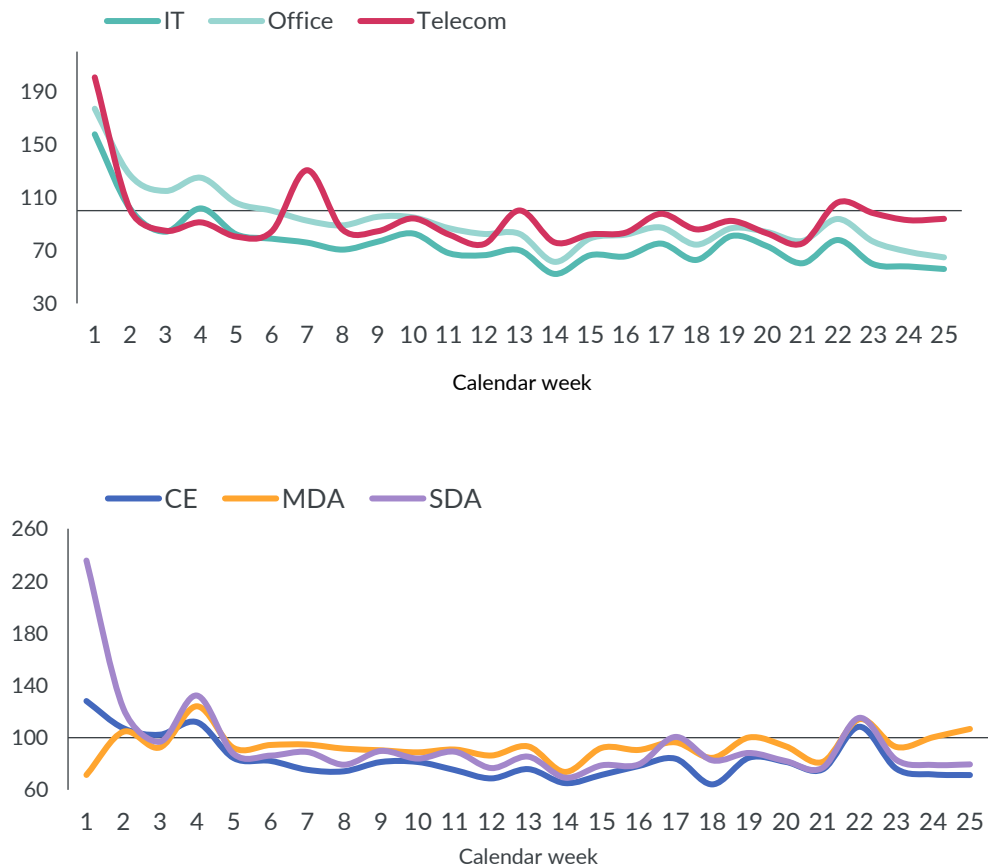
Russia

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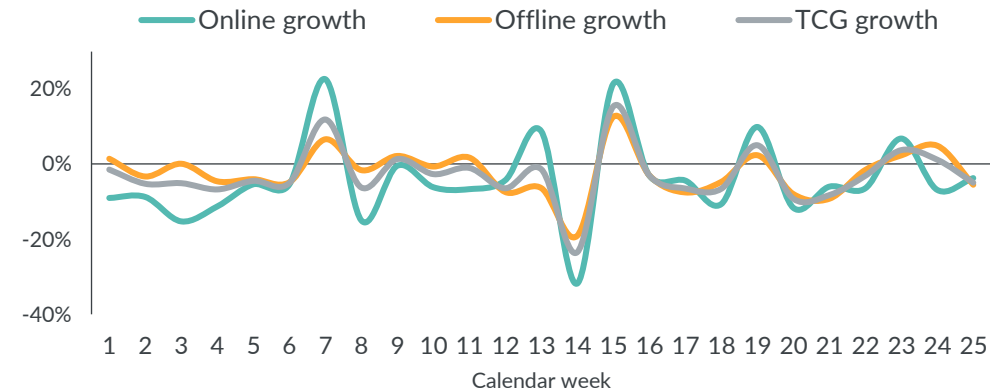
Brazil

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 25 (June 19 – June 25)



- Traditional retail posted a minus of 6% vs week 25 in 2022 and online sales were down by -4%, resulting in a downswing of the total TCG market of 5%.
- Desktop computing (-38%) was the worst-performing product group among IT/Office products. All other categories lagged, too, with inkjet printers at -9% hit the least. Smartphones accelerated at +11%.
- While CE categories were double-digit negative at more than 10%, washing machines and SDA product groups were slightly positive. Hot beverage makers gained 10%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 25 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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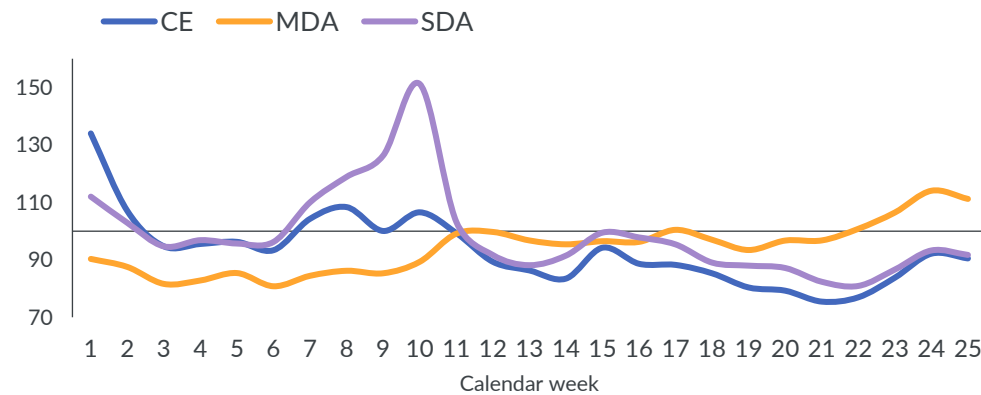
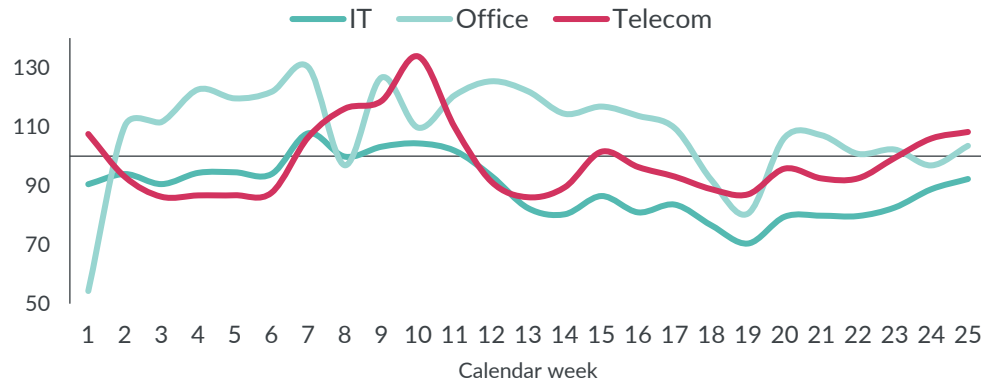
> Russia

Japan

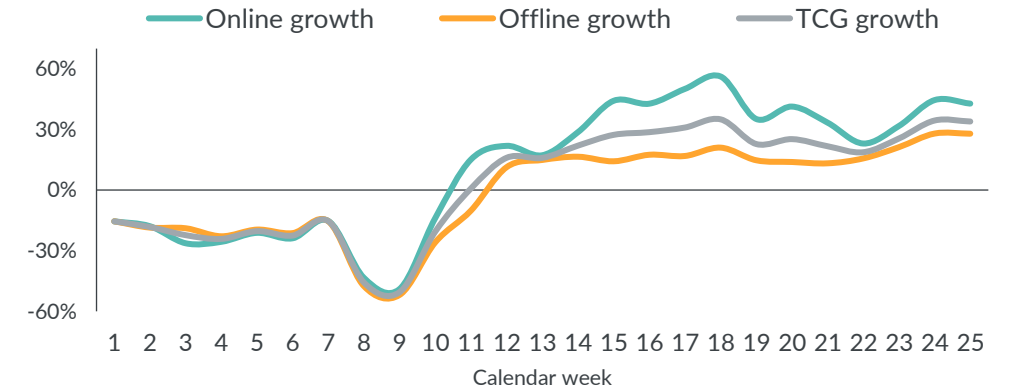
Brazil

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 25 (June 19 – June 25)



- The Russian TCG market continued its recovery, delivering +34% versus week 25 in 2022. Online sales at +43% were the driving force. Traditional retail added to it at +28%.
- Nearly all IT/Office and telecom categories accelerated by 20% or more, with media tablets out in front at +64%. Only desk computing was a little weaker at +8%.
- Audio home systems (+66%) and TVs (+45%) delivered the highest growth rates. Dental care was the weakest category at +7%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 25 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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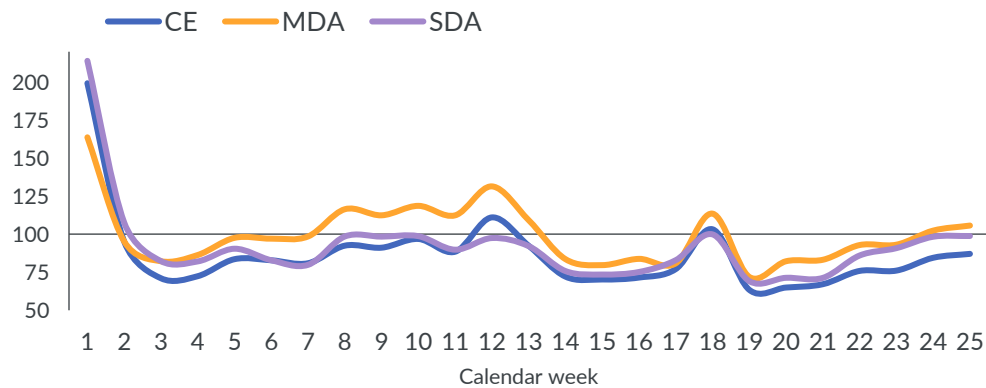
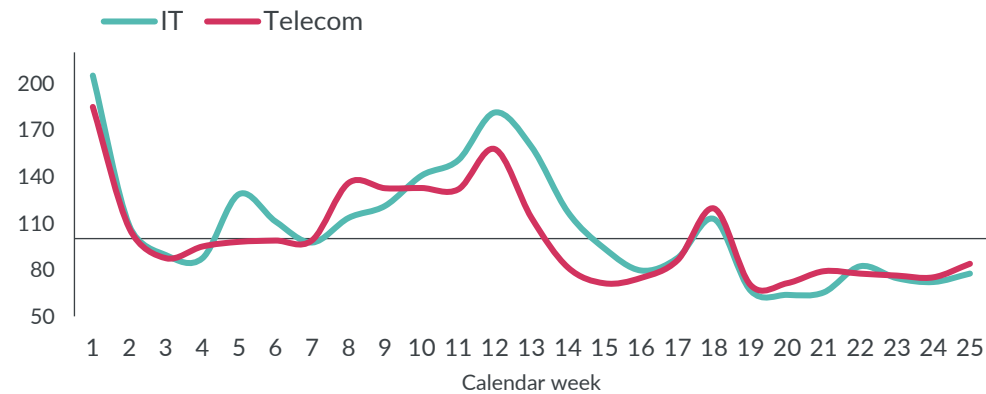
Russia

➤ Japan

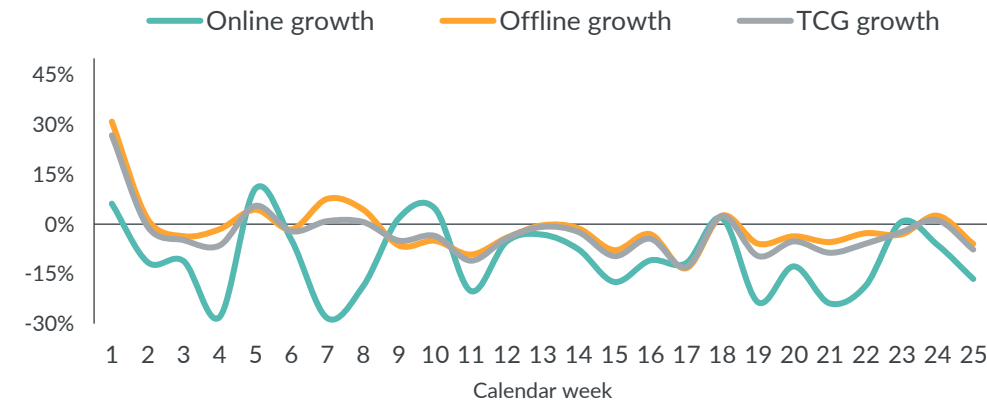
Brazil

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 25 (June 19 – June 25)



- Online sales delivered -16%. Combined with weak traditional retail at -6% total TCG market experienced a downswing of 8%.
- The driver of this development was media tablets at -26%. Mobile computing posted -6%. While smartphones were nearly flat, headsets delivered +10%.
- While MDA products witnessed negative trends with cooling posting -19% and washing machines slightly down by 1%, SDA and CE categories delivered a mixed picture with soundbars in the lead at +29% and air treatment bringing up the rear at -21%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 25 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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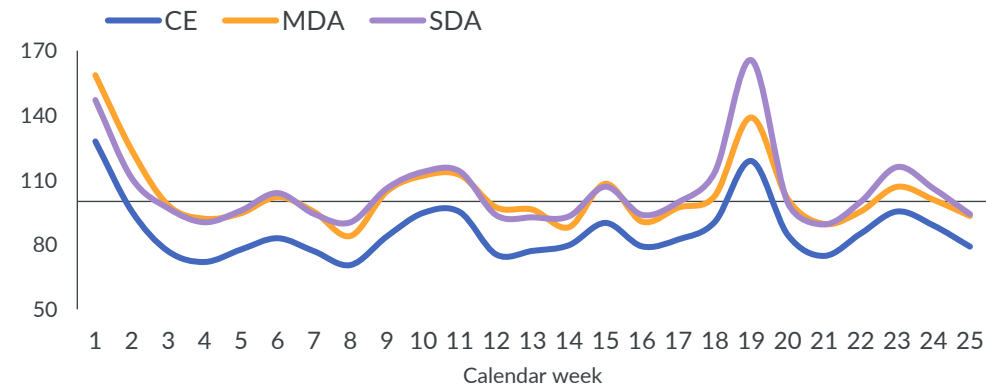
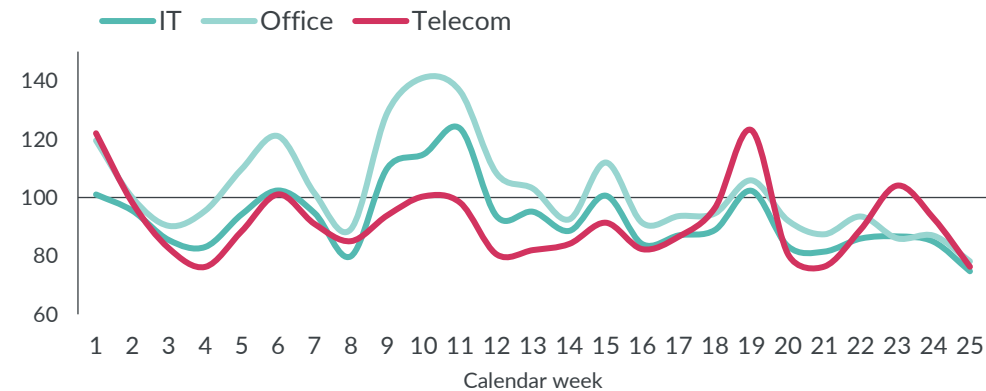
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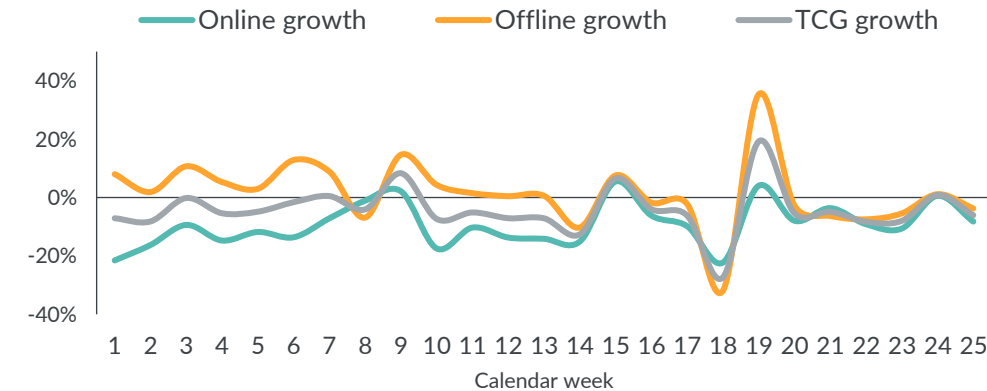
➤ Brazil

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 25 (June 19 – June 25)



- Traditional retail experienced a minus of 4% vs week 25 in 2022 and online sales were down by -8%, resulting in a downswing of the total TCG market of 6%.
- The rates for IT/Office products ranged from -18% for mobile computing to +30% for media tablets. Smartphones lagged at -11%.
- The overall positive picture for MDA and SDA product groups delivered double-digit growth for hot beverage makers (+32%) and shavers (+11%). Cooling and food preparation were weak at +2%. TV sales experienced -4% in week 25 and audio home systems lost 19%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 25 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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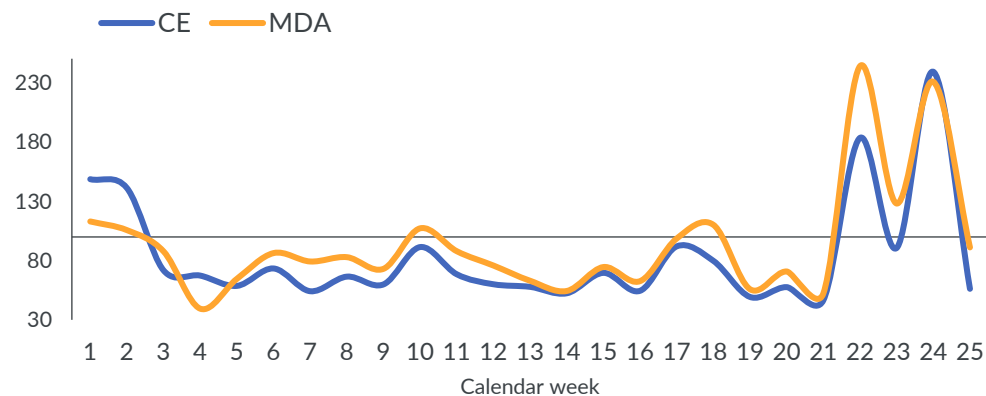
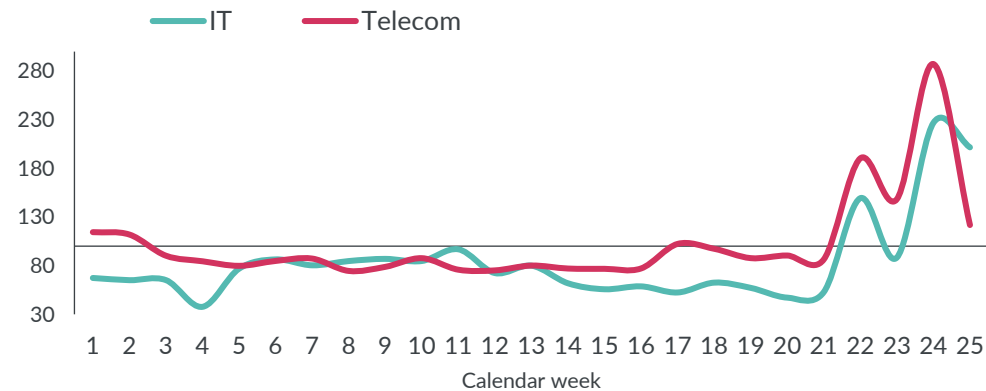
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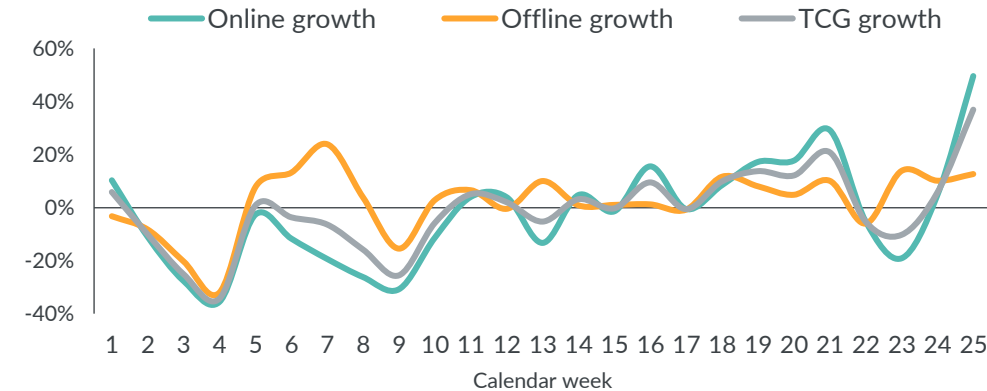
Brazil

➤ 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 25 (June 19 – June 25)



- Strong acceleration for online sales (+50%) pushed the total TCG market to a plus of 37%. Traditional retail added to it at +13%.
- Mobile PCs delivered an increase of 29%. Smartphones accelerated at +58%.
- Week 25 in 2023 saw weak results for TV sales (+2%). Washing machines declined by 8% and cooling dropped by 12%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 25 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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