



Growth
from
Knowledge

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 164
cw28/2023

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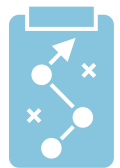
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

European Consumer Climate stagnates in June 2023



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Italy

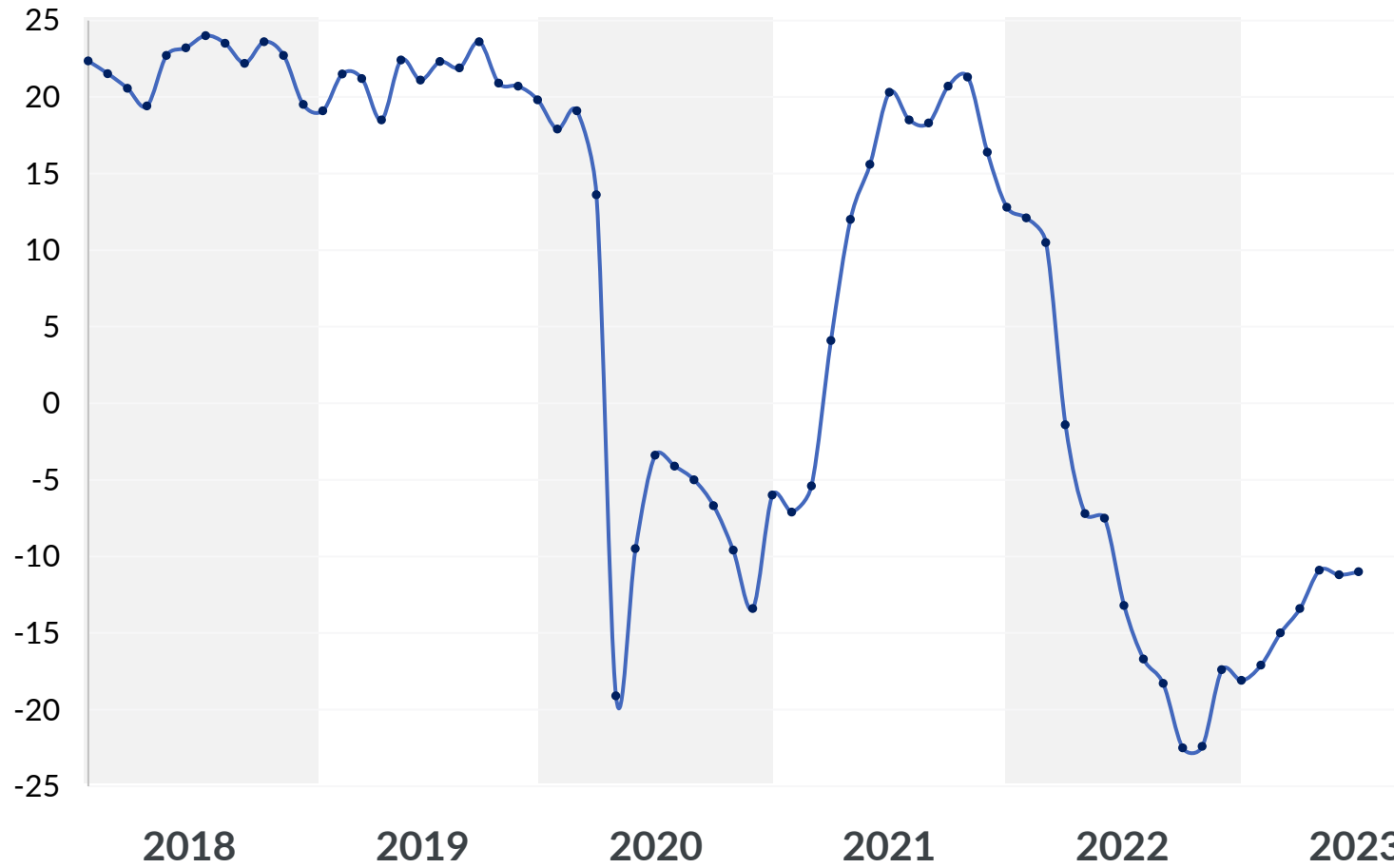
Spain

Russia

Japan

Brazil

China



Economic expectations
Index: -7 | +/- vs
prev. month: +2%



Income expectations
Index: -12 | +/- vs
prev. month: +3%



Willingness to buy
Index: -30 | +/- vs
prev. month: +1%

Weekly retail insights from the Point of Sale

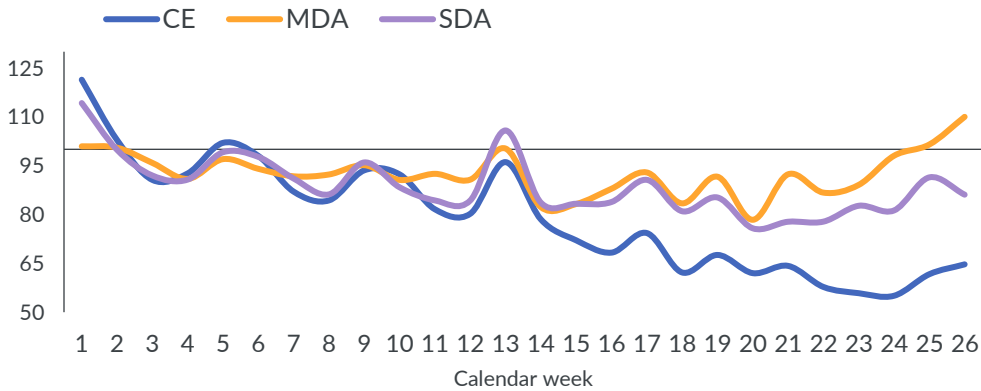
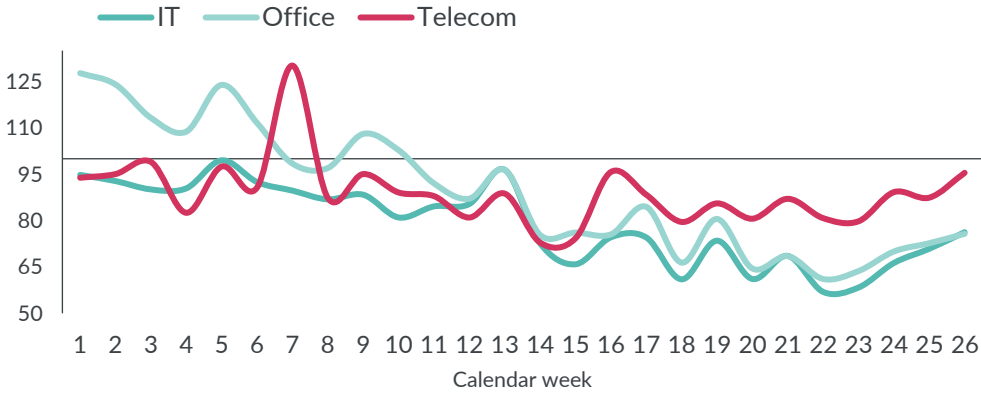
Spotlight on Germany



- About **gfknewron**
- Fact of the week
- > Germany**
- Great Britain
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

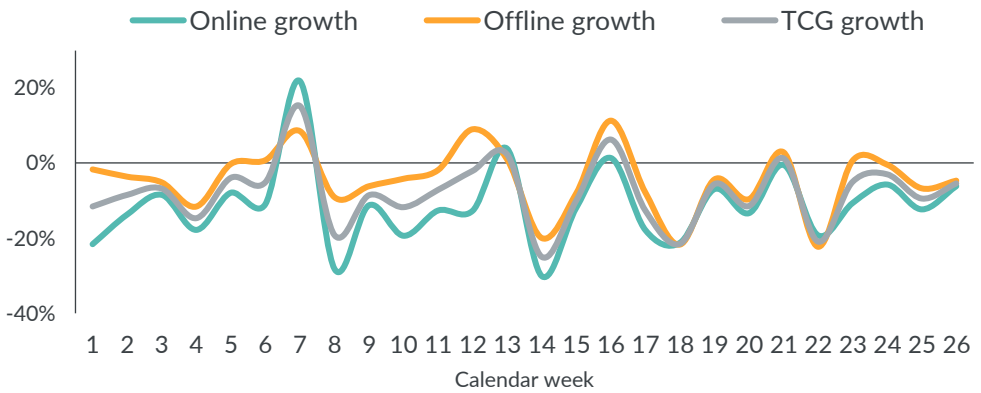
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 26 (June 26 – July 02)



- Similar rates of -5% for traditional retail and -6% for online sales dragged the total TCG market down by 5%.
- Except for media tablets at +15% and laser printers at +16%, IT/Office products posted negative trends, led by desk computing and inkjet printers at -15%. Smartphones fell by 8% in week 26.
- While soundbars again declined in double-digits, TV sales decreased by just 5% and audio home systems even were up 2%. MDA/SDA categories delivered a mixed picture with dental care out in front at +18% and air treatment bringing up the rear at -22%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 26 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.

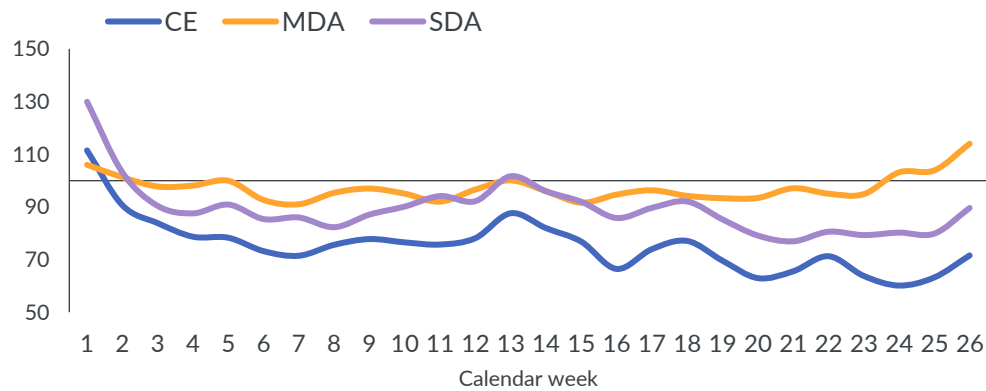
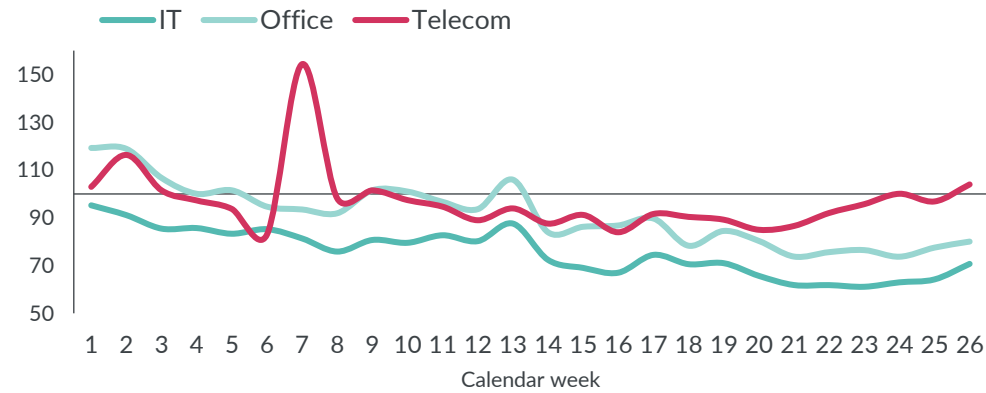
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

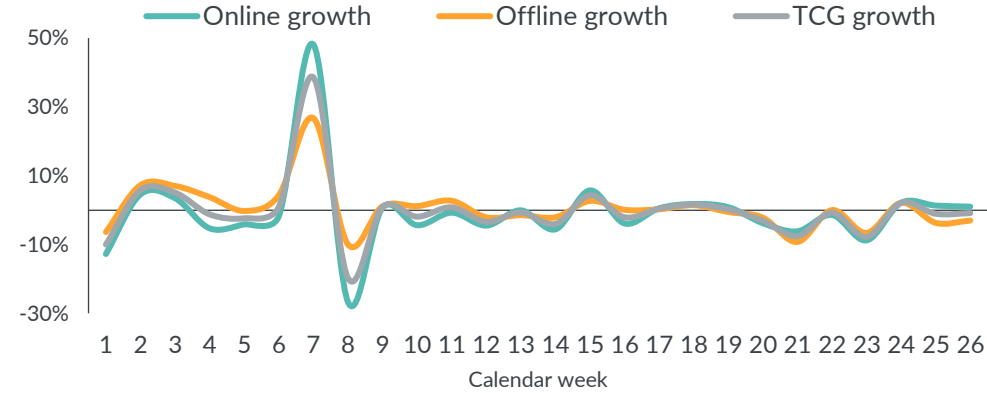


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain**
- France
- Italy
- Spain
- Russia
- Japan
- Brazil
- China

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 26 (June 26 – July 02)



- Deceleration of traditional retail (-3%) dragged the total TCG market down by 1%. Online sales at +1% were not able to compensate for the losses.
- Except for laser printers at +12%, all other IT/Office categories witnessed negative trends with desk computing in the lead at -34% and keyboards hit least at -2%. Smartphones accelerated at +8%.
- CE products declined, too, with TV sales losing 22%. The overall positive picture for MDA/SDA categories was clouded by hot beverage makers at -1%. Food preparation was stable compared to the same week last year. Vacuum cleaners at +15% were the best-performing product group.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 26 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

> France

Italy

Spain

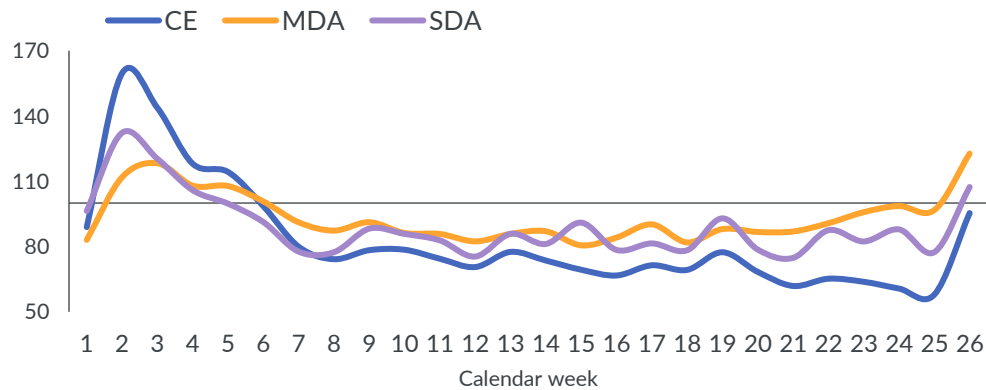
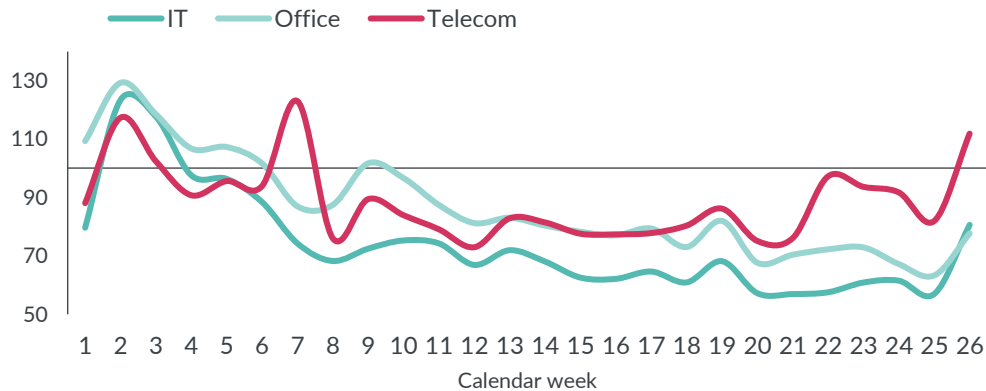
Russia

Japan

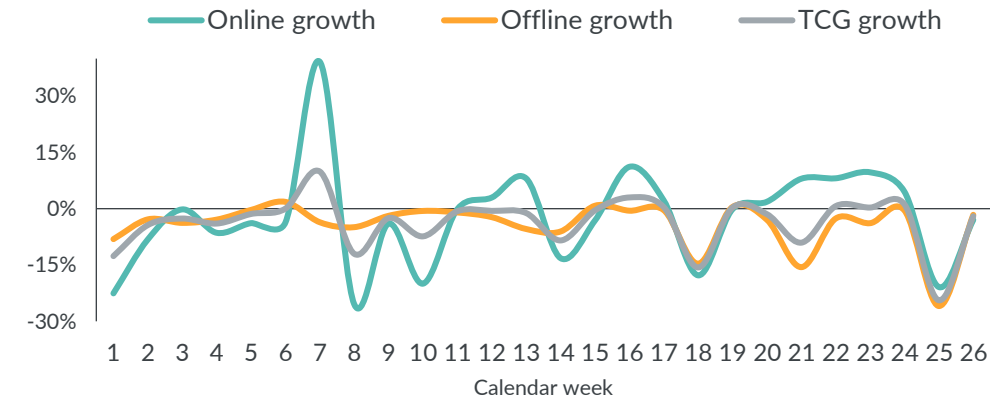
Brazil

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 26 (June 26 – July 02)



- Good recovery for online sales (-3%, up from -21% the previous week) and traditional retail (-2%, up from -26%) resulted in -2% for total TCG.
- Most IT/Office products posted double-digit negative trends. Laser printers lost 7%. Keyboards were slightly up by 3% and mice were flat. Smartphones accelerated at +8%.
- In week 26, air treatment delivered extraordinary growth of 117%. Except for vacuum cleaners at +7%, all other MDA/SDA/CE products witnessed negative trends ranging from -20% for soundbars to -3% for washing machines.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 26 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

Great Britain

France



Italy

Spain

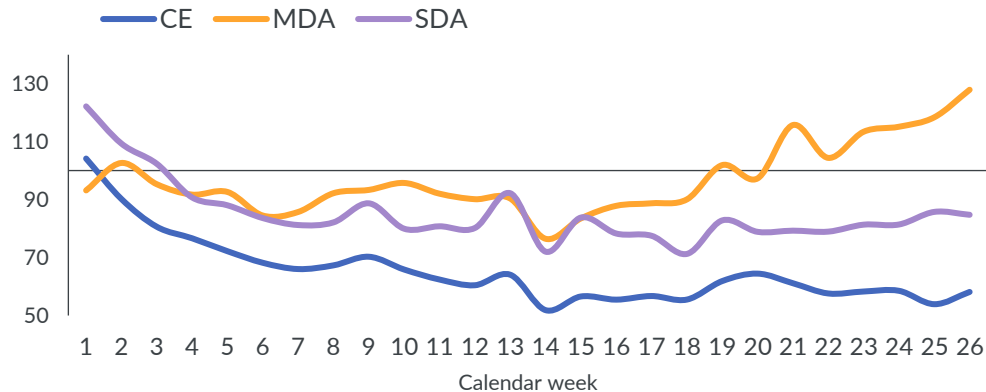
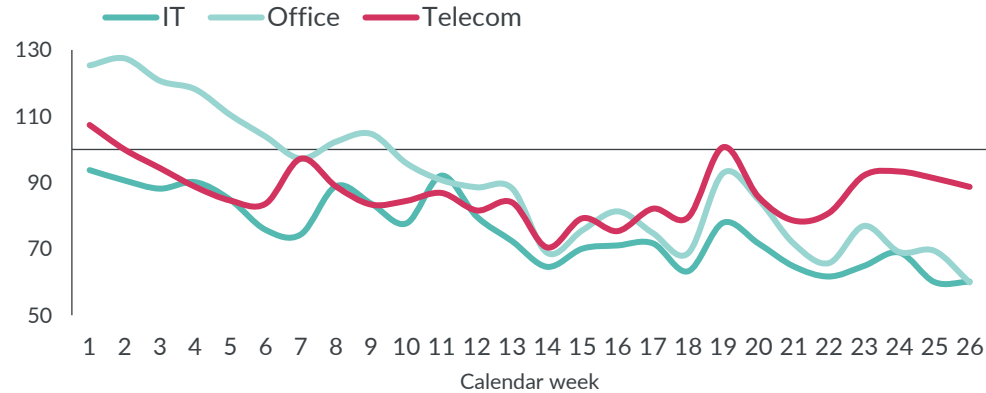
Russia

Japan

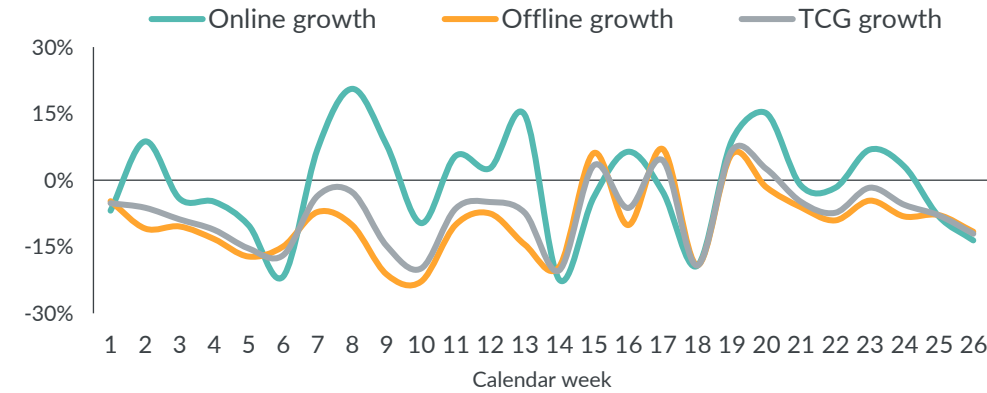
Brazil

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 26 (June 26 – July 02)



- The total TCG market fell by 12%, driven online sales at -14%. Traditional retail posted -12%, too.
- Except for laser printers at +19%, all other IT/Office products decreased in double digits, led by mobile computing at -26%. Smartphones lagged at -10%.
- While CE products lost in solid double digits (TVs posting -30%), MDA/SDA categories posted a mixed picture, ranging from -40% for air treatment to +9% for washing machines. Cooling was flat compared to the same week in the previous year.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 26 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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Fact of the week

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Great Britain

France

Italy

> Spain

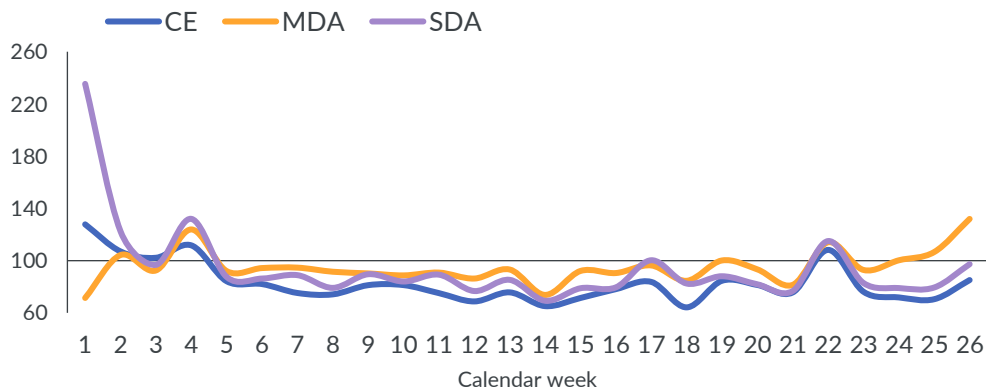
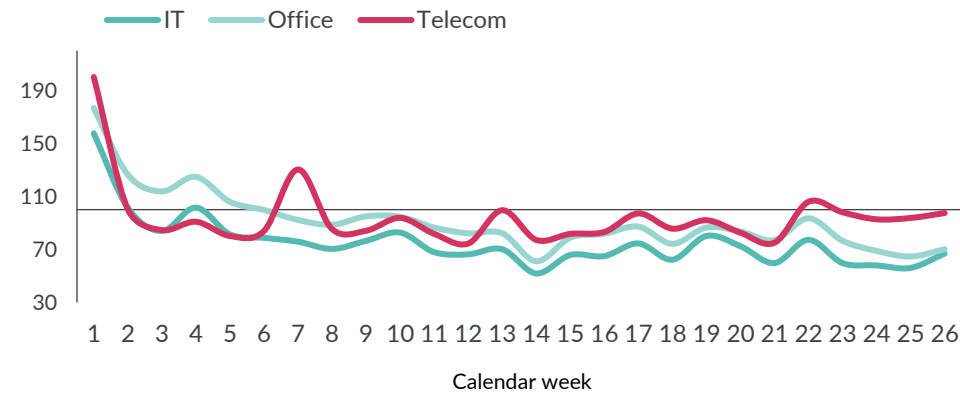
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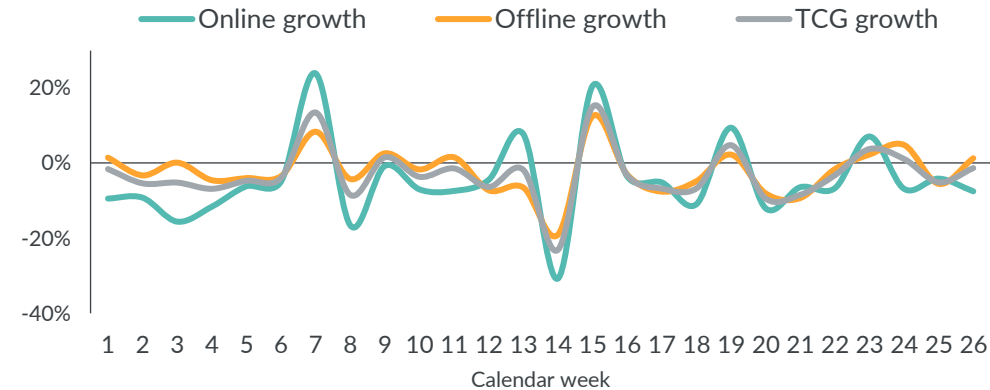
Brazil

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 26 (June 26 – July 02)



- Online sales experienced a minus of 8% versus week 26 in 2022. Traditional retail at a weak +1% was not able to balance out, resulting in a slight downswing of the total TCG market of 1%.
- Desktop computing (-29%) was the worst-performing product group among IT/Office products. Inkjet printers and mobile computing slumped at -17%. Smartphones were down 2%.
- MDA/SDA products delivered an overall positive picture with cooling in the lead at +16% and washing machines and shavers at +3% and +4% respectively. Audio home systems slumped at -19%. TVs were down by 6%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 26 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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France

Italy

Spain

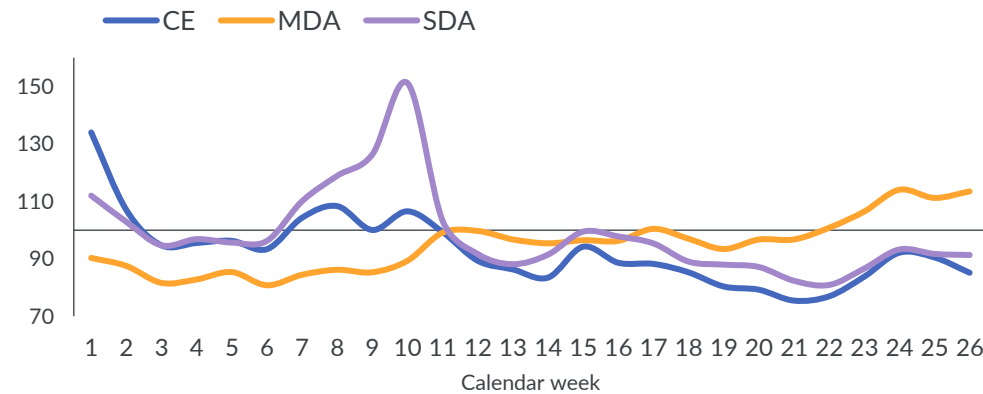
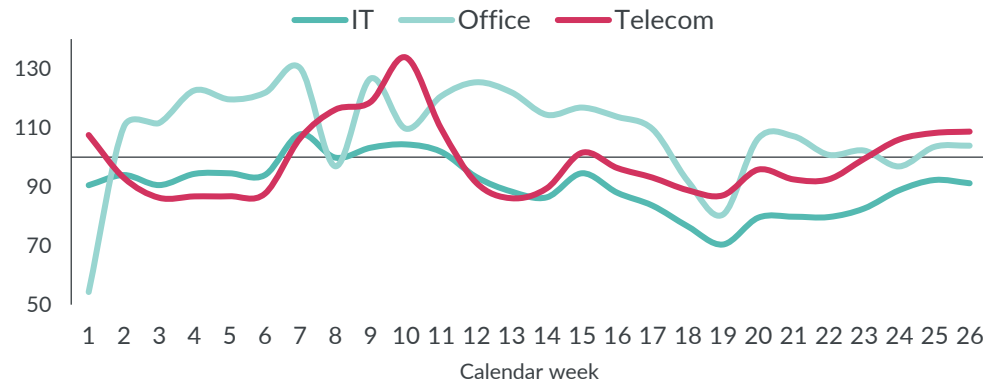
> **Russia**

Japan

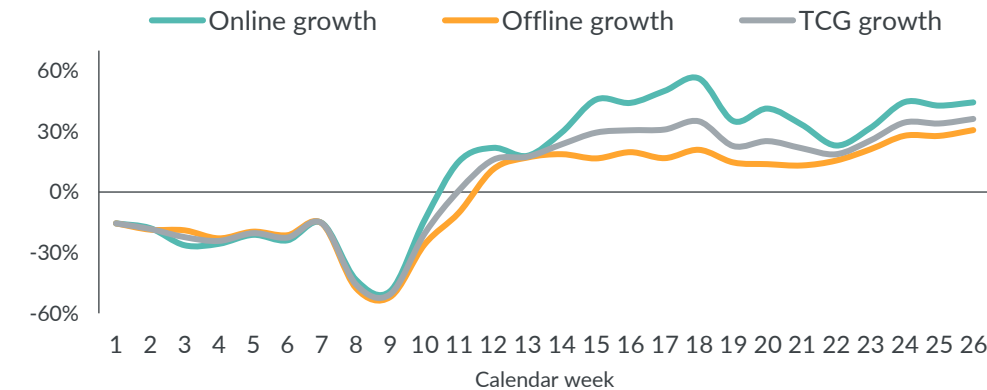
Brazil

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 26 (June 26 – July 02)



- The Russian TCG market continued its recovery, delivering +36% versus week 26 in 2022. Online sales at +44% were the driving force. Traditional retail added to it at +31%.
- Nearly all IT/Office and telecom categories accelerated by 30% or more, with media tablets out in front at +76%. Mobile computing increased by 20%. Only desk computing delivered a negative result, at -3%.
- Audio home systems (+43%) delivered the highest growth rate within MDA/SDA/CE products. Washing machines at +39% and TV sales at +37% were close. Air treatment was the weakest category at +8%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 26 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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Fact of the week

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Spain

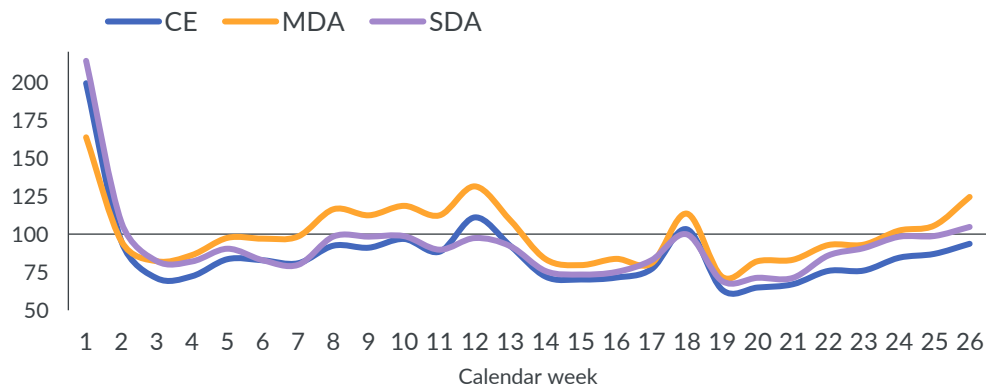
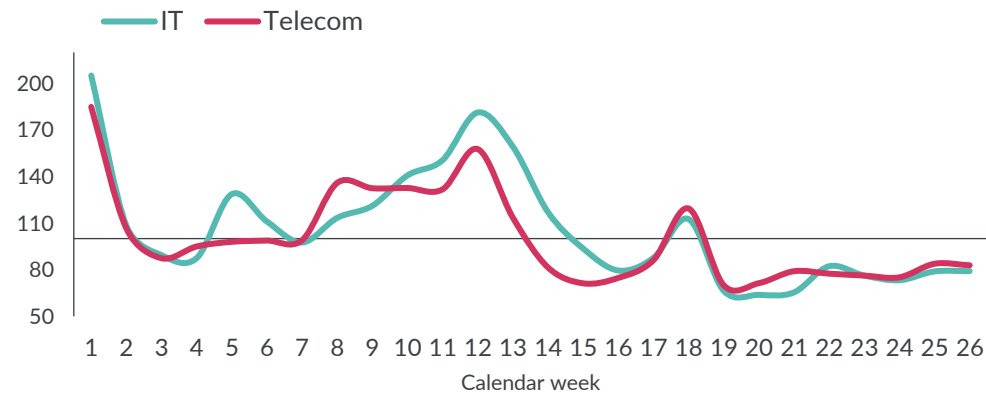
Russia

➤ Japan

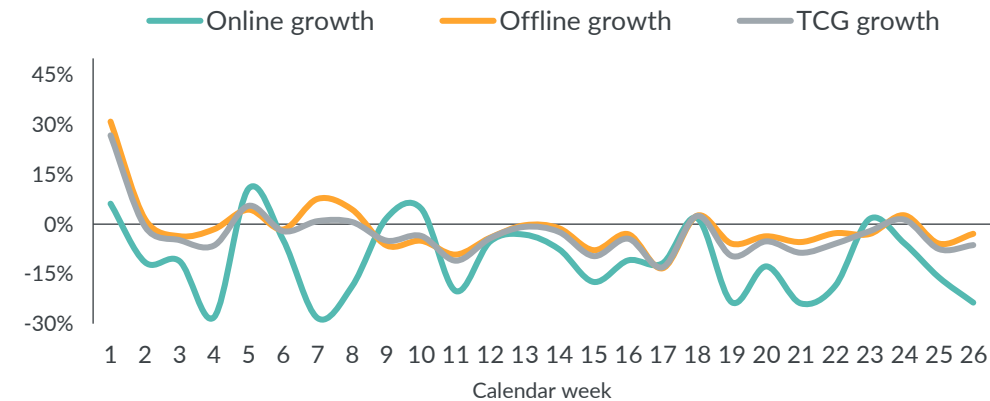
Brazil

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 26 (June 26 – July 02)



- Online sales delivered -24%. Combined with weak traditional retail at -3% the total TCG market experienced a downswing of 6%.
- The driver of this development was media tablets at -50%. Mobile computing was flat. While smartphones delivered +3%, headsets slumped at -23%.
- Mixed trends for MDA/SDA/CE products saw soundbars and hot beverage makers in the lead at +24% and +11% respectively. Audio home systems at -27% and cooling at -15% marked the other end of the scale.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 26 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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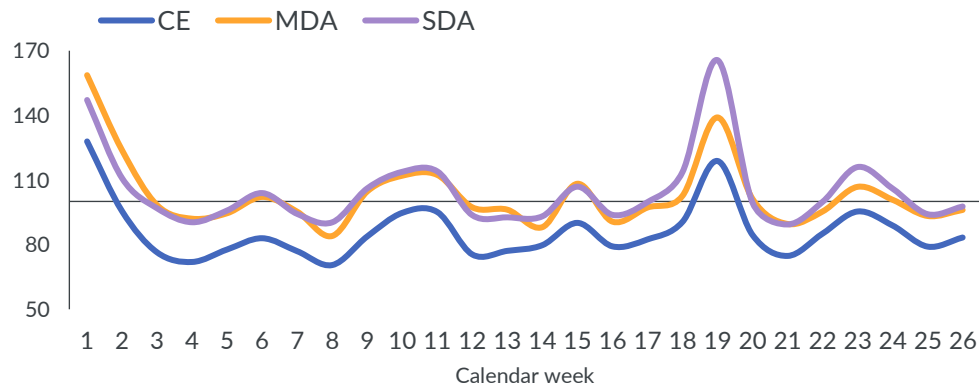
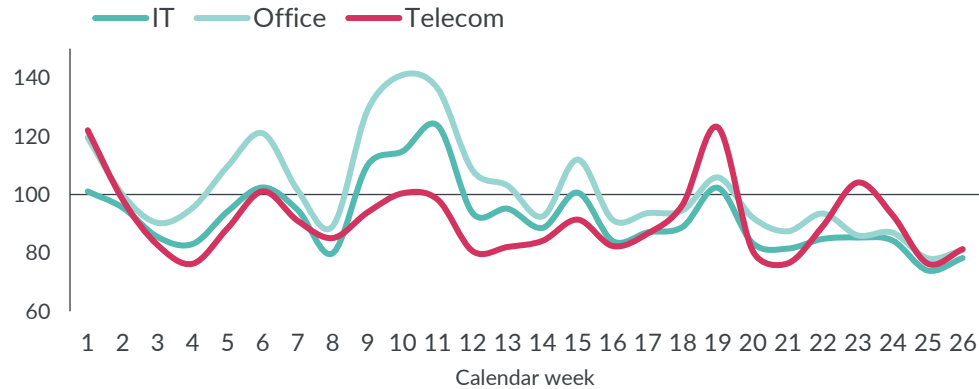
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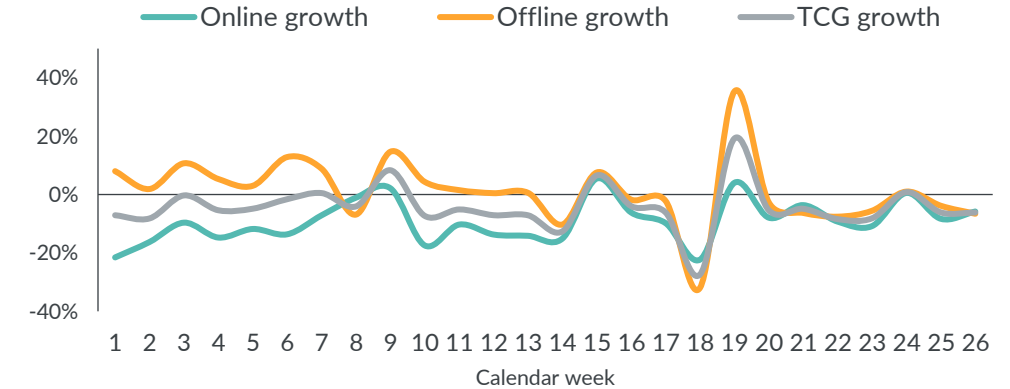
➤ Brazil

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 26 (June 26 – July 02)



- Nearly identical rates of -7% for traditional retail and -6% for online sales dragged the total TCG market down by 6%.
- Media tablets at +36% were the best-performing category in week 26. Laser printers were flat. Smartphones lagged at -13%.
- The overall positive picture for MDA and SDA product groups delivered double-digit growth for hot beverage makers (+25%), shavers (+19%), and vacuum cleaners (+11%). Cooling and food preparation were weak at +4% and +5% respectively. TV sales experienced -3% in week 26 and audio home systems lost 20%.

Weekly retail insights from the Point of Sale

Spotlight on China



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Fact of the week

Germany

Great Britain

France

Italy

Spain

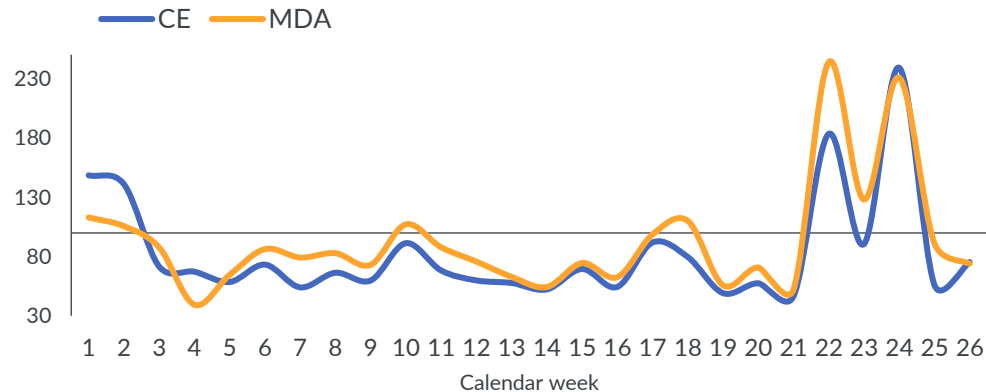
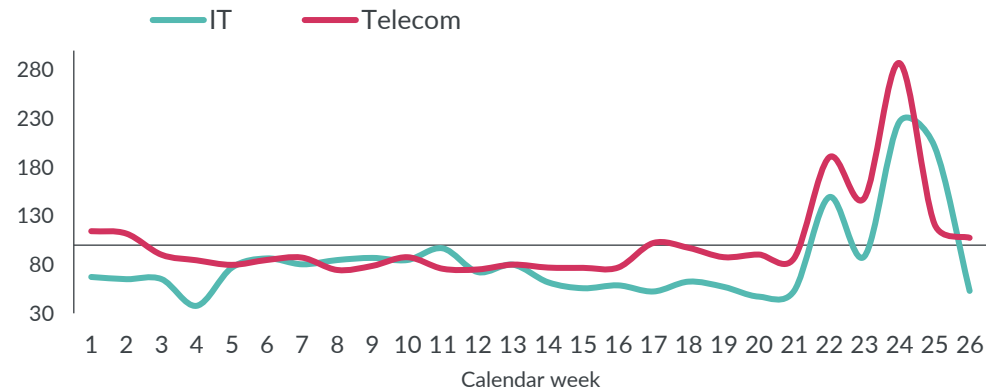
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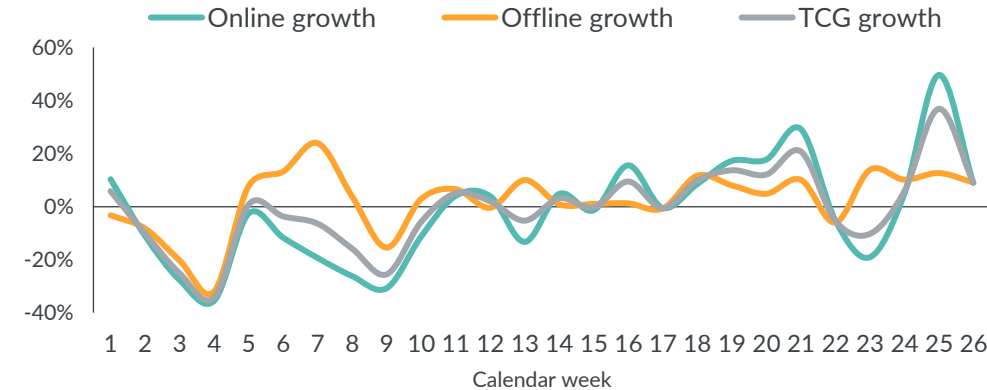
Brazil

> 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 26 (June 26 – July 02)



- At an identical rate of +9%, both traditional retail and online sales retail lifted the total TCG market by +9%.
- Smartphones accelerated at 21%. Mobile computing delivered a minus of 16%.
- Week 26 in 2023 saw solid decreases for washing machines (-18%) and cooling (-16%). TV sales were a little less negative at -9%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 26 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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