

## Press release

### A stable quarter in the Western Europe Technical Consumer Goods market

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Wolfgang Seibold  
T +49 911 395-3570  
F +49 911 395-4046  
[wolfgang.seibold@gfk.com](mailto:wolfgang.seibold@gfk.com)

Ulrike Röhr  
Corporate Communications  
T +49 911 395-4146  
[ulrike.roehr@gfk.com](mailto:ulrike.roehr@gfk.com)

#### GfK TEMAX® results for Western Europe, Q1 2016

Nuremberg, June 3, 2016 – In the first quarter of 2016, the Western European Technical Consumer Goods (TCG) market remained stable, with a mixture of ups and downs in the seven sectors, compared to Q1 2015. There were sales value increases in the Major Domestic Appliances (MDA), Small Domestic Appliances (SDA) and Telecommunications (TC) sectors. In all other sectors sales value declined, although very marginally. The overall TCG market in Western Europe in Q1 2016 generated €50.8 billion.

#### Western Europe: Technical consumer goods – sales value by category

	Q2 2015	Q3 2015	Q4 2015	Q1 2016	Q1 2016 / Q1 2015 / +/- %	Q1 2016	Q1 2016 / Q1 2015 +/- %
	M. EUR	M. EUR	M. EUR	M. EUR		M. EUR	
Consumer Electronics (CE)	5,919	6,428	9,794	7,173	-1.4%	7,173	-1.4%
Photography (PH)	1,353	1,369	1,525	1,145	-8.5%	1,145	-8.5%
Major Domestic Appliances (MDA)	7,661	8,415	8,928	8,283	4.1%	8,283	4.1%
Small Domestic Appliances (SDA)	3,647	3,896	5,697	4,221	1.0%	4,221	1.0%
Information Technology (IT)	12,268	13,427	17,184	13,340	-2.4%	13,340	-2.4%
Telecommunications (TC)	11,629	12,297	16,719	12,177	2.5%	12,177	2.5%
Office Equipment & Consumables (OE)	4,400	4,333	5,014	4,486	-3.0%	4,486	-3.0%
<b>GfK TEMAX® Western Europe</b>	<b>46,877</b>	<b>50,165</b>	<b>64,861</b>	<b>50,825</b>	<b>-0.0%</b>	<b>50,825</b>	<b>-0.0%</b>

Source: GfK TEMAX® Western Europe, GfK

#### Consumer Electronics

The CE sector remained in negative territory in Q1 2016 – down by 1.4 percent, compared to the same quarter in 2015.

There was significant value growth in France as TV broadcasters switched from standard-definition television (SDTV) to high-definition (HD) signals. This stimulated demand in the TVs category.

Video game consoles, loudspeakers, and docking mini speakers all achieved double-digit growth in Q1 compared to the same period last year. For European consumers, using gaming devices and products for listening to music became more common than watching TV.

GfK SE  
Nordwestring 101  
90419 Nuremberg  
Germany

T +49 911 395 0

Management  
Matthias Hartmann (CEO)  
Christian Diedrich (CFO)  
Dr. Gerhard Hausrucking  
David Krajicek  
Alessandra Cama

Supervisory Board Chairman  
Dr. Arno Mahler

Commercial register  
Nuremberg HRB 25014

## **Photography**

In Q1 2016, the PH sector was worth €1.1 billion – down by 8.5 percent on the same period in 2015.

Fixed-lens devices registered a double-digit decline – down by 16 percent in value terms compared to Q1 2015. High-value products, such as interchangeable-lens cameras and single lenses, registered a fall of just 7 percent.

## **Major Domestic Appliances**

The overall sector grew by 4.1 percent in Q1 2016, compared to 2015's Q1. The sales value in all product groups increased with the exception of freezers.

All countries registered an increase of sales value in Q1 2016 compared to the same period last year. Denmark, Greece and Portugal reported double-digit growth of 14.1 percent, 11 percent, and 13 percent, respectively.

Smart connect products continued to grow in terms of sales value in Q1 2016, but on a limited basis.

## **Small Domestic Appliances**

In the first quarter of 2016, the SDA sector registered a modest increase of 1 percent, compared to Q1 2015.

There was a double-digit increase in the Danish market compared to last year's Q1 (up by 14.8 percent).

The overall value of the SDA sector in Western Europe was €4.2 billion in Q1 2016.

## **Information Technology**

IT was the Western European market's biggest sector in Q1 2016 – worth around €13.3 billion – although it was slightly down on the same period in 2015. In Greece, the sales value declined 38.1 percent, compared to Q1 2015.

Core IT categories continued to struggle, although the mobile computing products segment did well, supported by sales of convertibles and computing tablets. Larger models and desktop computing products were down in terms of value growth.

Finally, media tablets continued their decline, and the limited growth of hardware products had a detrimental effect on sales of peripherals.

## **Telecommunications**

In Q1 2016, the TC sector rose by 2.5 percent, compared to Q1 2015. With a value of €12.1 billion it is the TCG market's second largest sector.

There was mixed success in the smart and mobile phones market. Several territories suffered from the market saturation of smartphones – including Denmark, Spain and Greece. On the other hand, the UK, France, Italy, and the Benelux countries enjoyed sales value growth.

Wearables are a growing product group in the TCG market. In some instances, sales value growth of more than 100 percent has been reported.

### **Office Equipment and Consumables**

With a decline of 3 percent in Q1 2016, the year started badly in the OE sector, compared to the same period in 2015.

There was a small fall in demand for printing hardware, while inkjet multifunctional devices (MFDs), inkjet cartridges, and laser toners also lost market share.

Only sales of laser MFD (color) printers continued to increase.

View the GfK TEMAX® reports for all 41 individual countries, including data tables: <http://temax.gfk.com/reports/>

### **Note to editors**

GfK TEMAX® tracks the sales of technical consumer goods across 41 countries. The findings are based on GfK's retail panel, comprising data from around half a million retail outlets worldwide. GfK continually works to ensure its panel data is as accurate as possible, in terms of its representation of the end market.

### **About GfK**

GfK is the trusted source of relevant market and consumer information that enables its clients to make smarter decisions. More than 13,000 market research experts combine their passion with GfK's long-standing data science experience. This allows GfK to deliver vital global insights matched with local market intelligence from more than 100 countries. By using innovative technologies and data sciences, GfK turns big data into smart data, enabling its clients to improve their competitive edge and enrich consumers' experiences and choices.

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Responsible under press legislation  
GfK SE, Corporate Communications  
Jan Saeger  
Nordwestring 101  
D-90419 Nuremberg  
T: +49 911 395 4087

[public.relations@gfk.com](mailto:public.relations@gfk.com)