



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 168
cw32/2023

Powered by **gfknewron**



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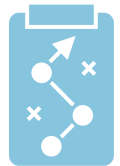
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Smartphones and mobile PC polarize in tech spec by nature of established device dimension ...



About **gfknewron**

Sales Value Mio US\$ Growth Rate: Jan-Mar 2023

> Fact of the week

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France

Italy

Spain

Russia

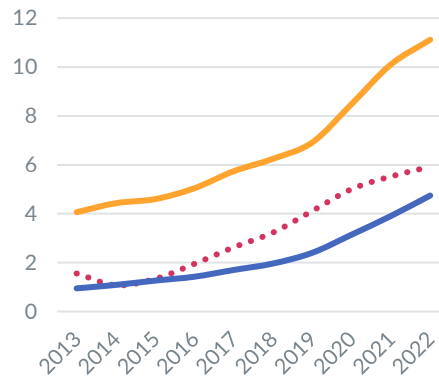
Japan

Brazil

China

MEMORY

RAM in GB



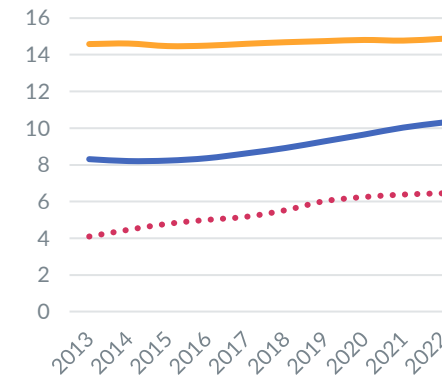
Storage in GB



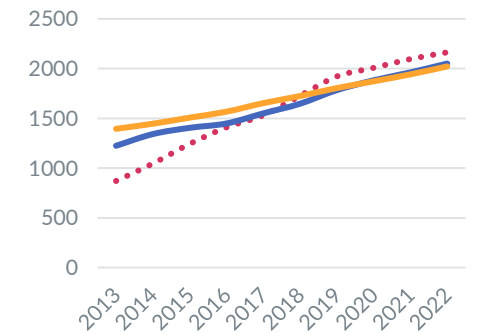
■ Smartphone ■ Media Tablet ■ Mobile Computing

DISPLAY

Display Size in Inch



Resolution Width in Pixel



... but smartphones excel in display resolution

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

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Spain

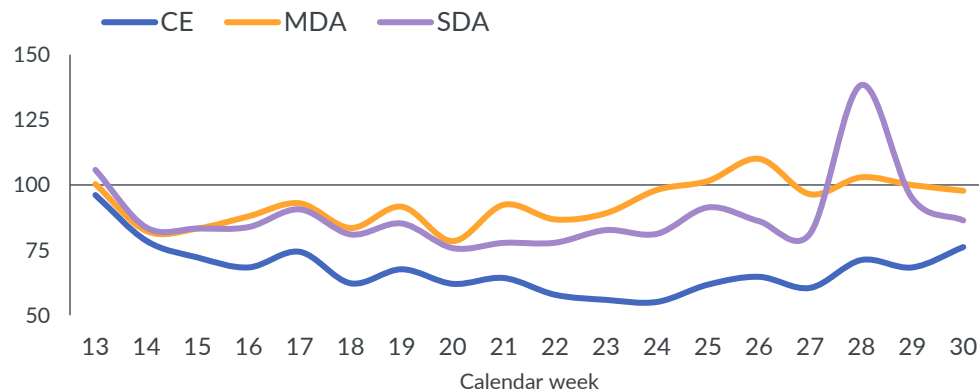
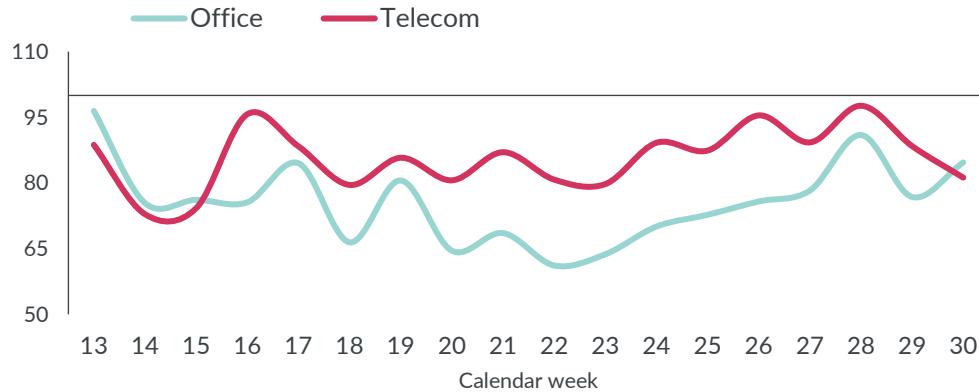
Russia

Japan

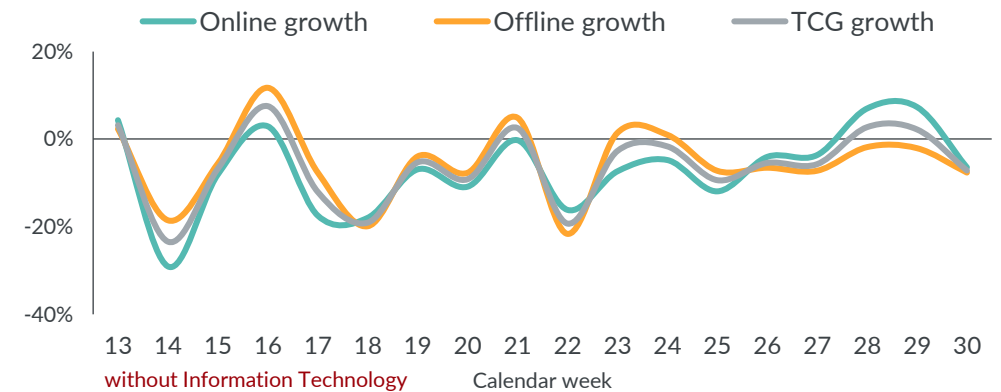
Brazil

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 30 (July 24 – July 30)



- With trends of -6% for online sales and -8% for traditional retail, the total TCG market experienced a downswing of 7%.
- While inkjet printers lost 6%, laser printers accelerated at +7%. Smartphones fell by 13% in week 30.
- Air treatment was the worst-performing product group in week 30, at -55%. All other SDA categories posted positive trends, led by dental care at +22%, and then hot beverage makers at +12%. While soundbars declined by 9%, PTV and audio home systems grew by 5% and 6% respectively. Cooling at -20% and washing machines (-3%) delivered negative rates.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 30 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), 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.

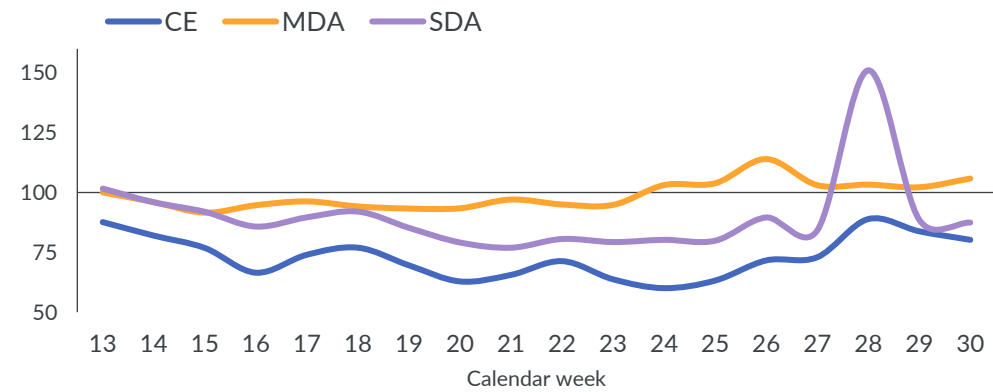
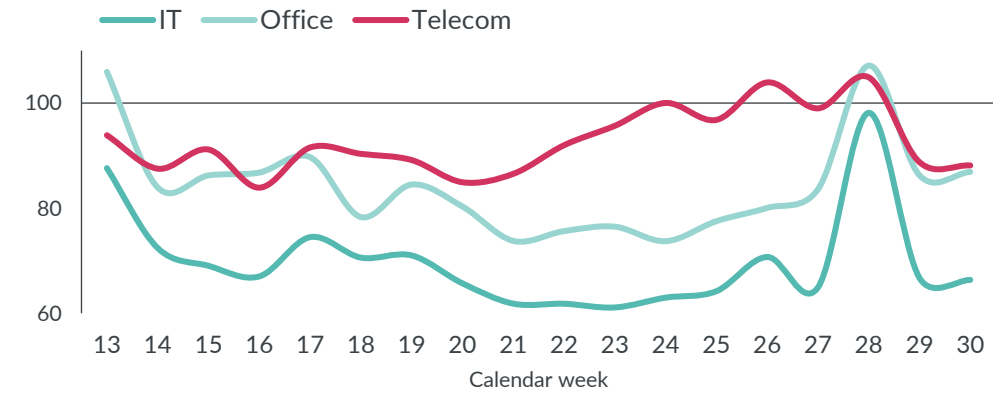
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

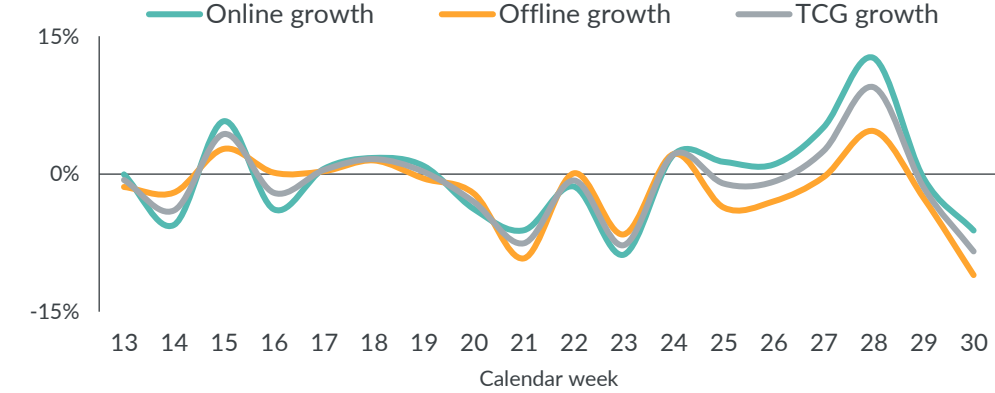


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 30 (July 24 – July 30)



- The deceleration of traditional retail (-11%) dragged the total TCG market down by 8%. Online sales at -6% added to it.
- Except for keyboards at +2% and inkjet printers at -2%, all other IT/Office categories witnessed double-digit negative trends with desk computing in the lead at -36%. Smartphones decelerated at -8%.
- CE products declined, too, with audio home systems losing 17% and TV sales down by 4%. The mixed picture for MDA/SDA included single-digit increases for most categories. Food preparation was flat. Shavers lagged at -2% and cooling slumped at -15%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 30 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

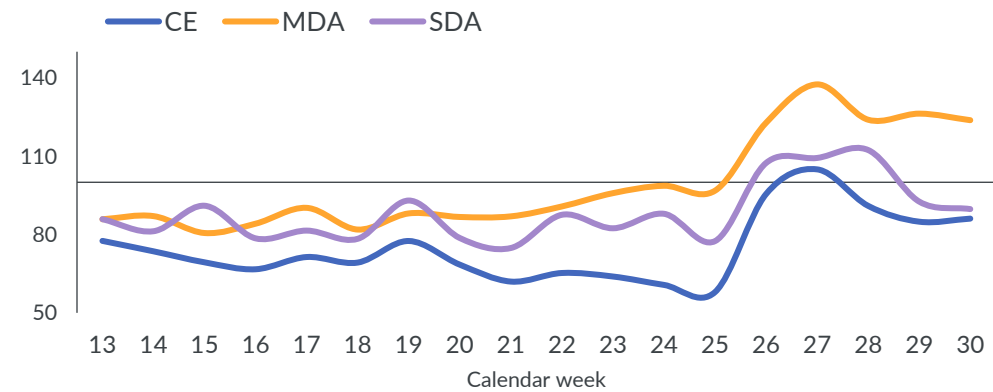
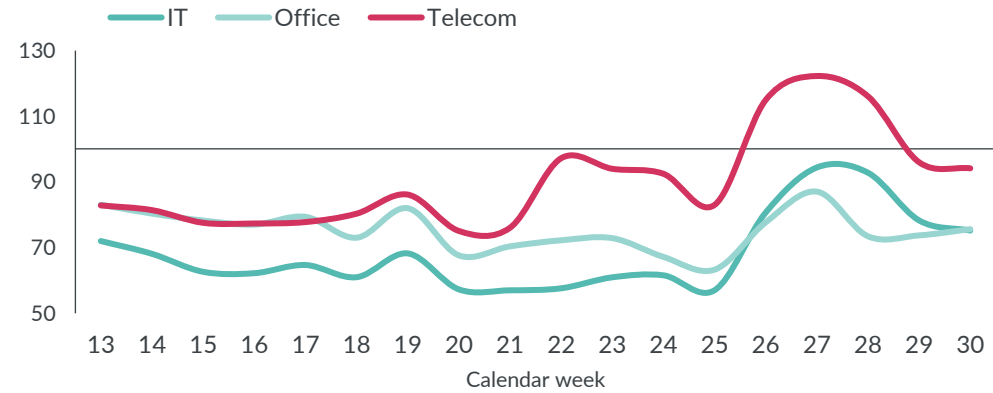
Weekly retail insights from the Point of Sale

Spotlight on France

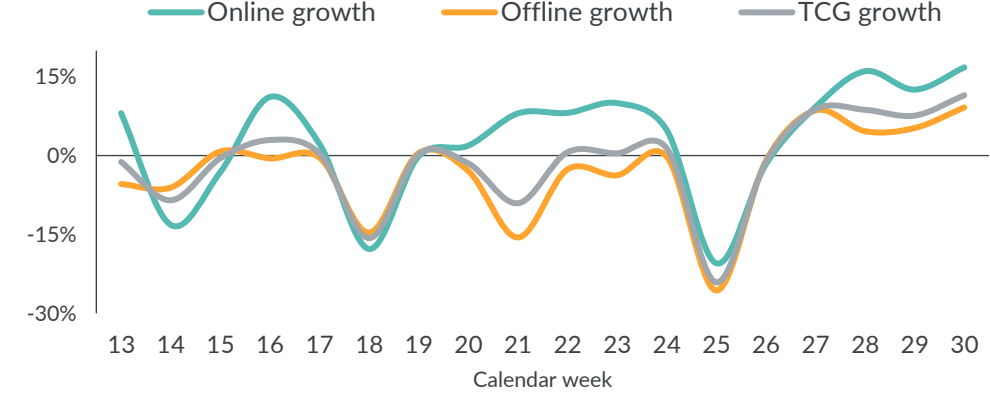


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 30 (July 24 – July 30)

- Good results for online sales (+17%) and traditional retail (+9%) boosted the total TCG market, delivering +11%.
- Differing trends within IT/Office saw mice in the lead at +14% and desk computing bringing up the rear at -15%. Smartphones accelerated at +12% and headsets were up 10%.
- In week 30, air treatment plummeted by 51%. Except for shavers at -4% and flat Cooling, most other MDA/SDA categories delivered solid double-digit growth, led by vacuum cleaners at +27%. TVs accelerated at +25%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 30 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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Fact of the week

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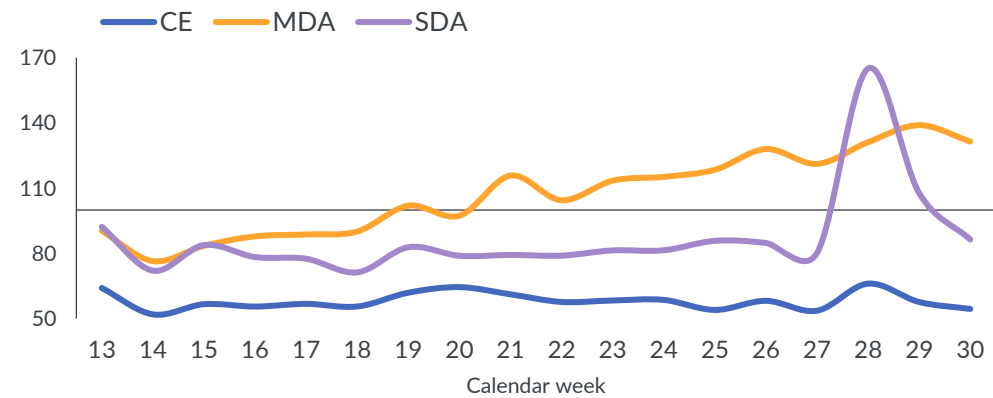
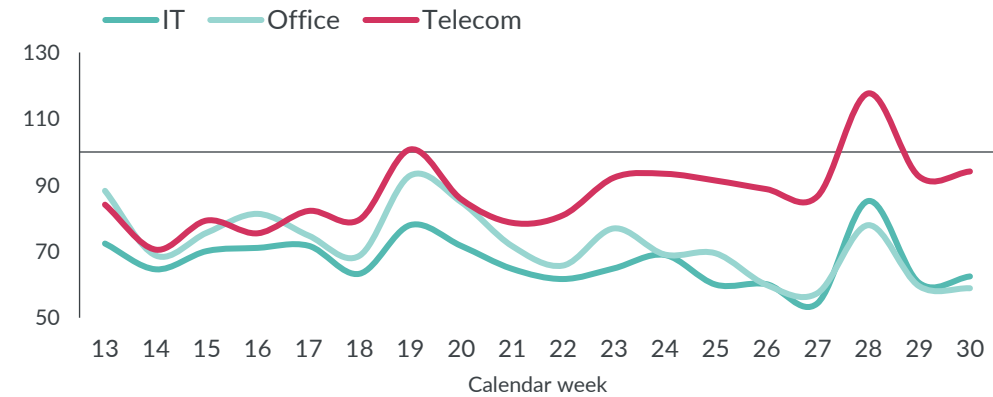
Russia

Japan

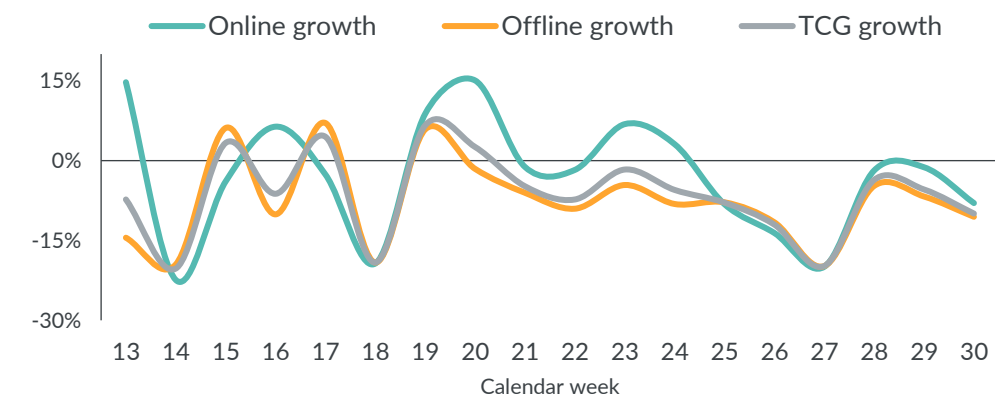
Brazil

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 30 (July 24 – July 30)



- The total TCG market fell by 10%, driven by traditional retail at -11%. Online sales posted -8%.
- Except for media tablets at a slight +1%, all other IT/Office products decreased in double digits, led by mobile computing at -19%. Smartphones lagged at -10%.
- While CE products lost in solid double digits (TVs posting -27%), MDA/SDA categories posted a mixed picture, ranging from -24% for air treatment to +10% for washing machines. Cooling and vacuum cleaners saw slight increases of 1% compared to the same week in the previous year.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 30 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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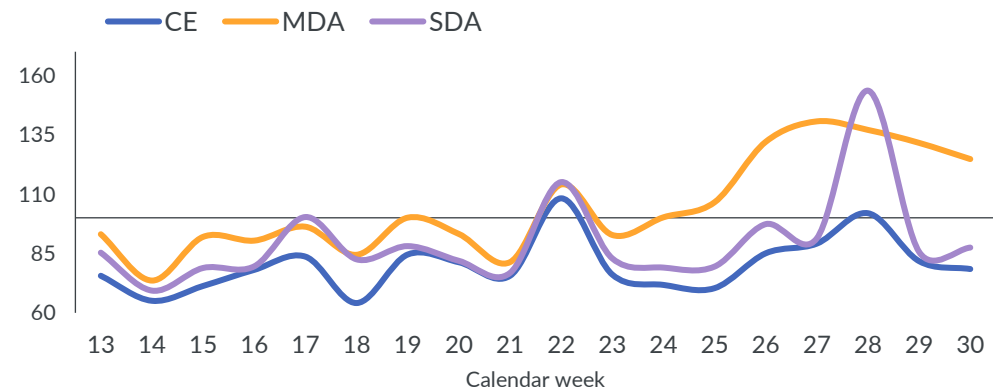
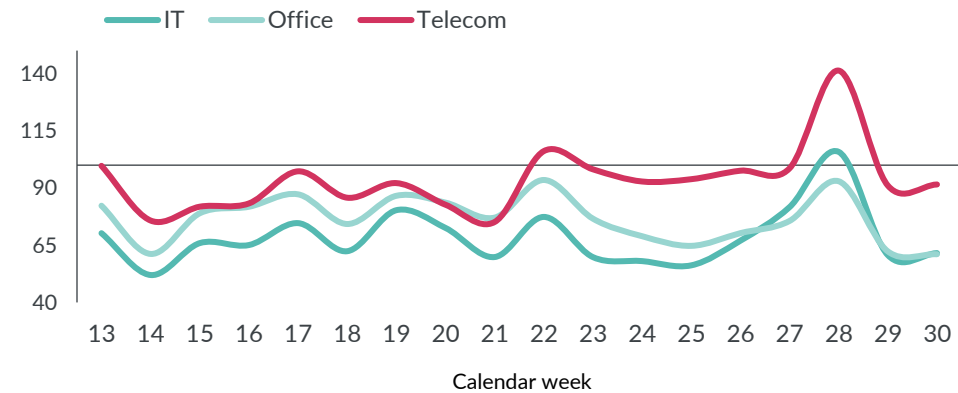
Russia

Japan

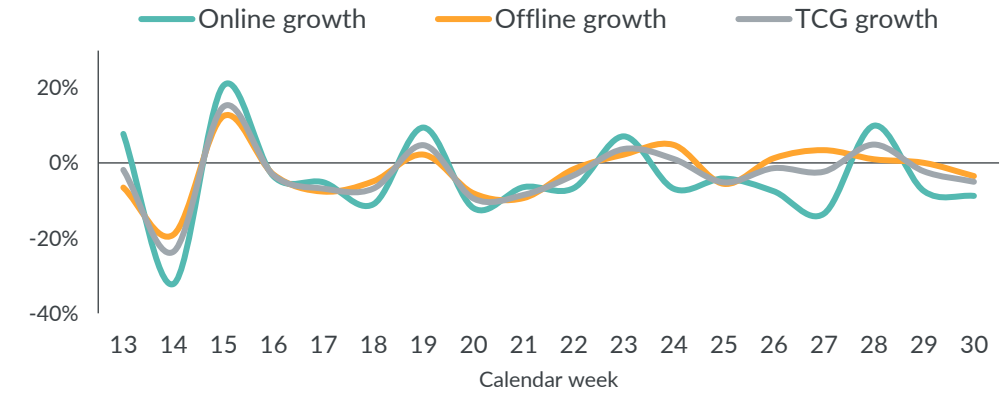
Brazil

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 30 (July 24 - July 30)



- Online sales experienced a minus of 9% versus week 30 in 2022. Traditional retail dropped by 3%. The result was a downswing for the total TCG market of 5%.
- Desktop computing at -27% was the worst-performing product group among IT/Office products. Mobile computing slumped at -15%. Inkjet printers were hit the least at -8%. Smartphones posted a growth of 3%.
- MDA/SDA products delivered a mixed picture with hot beverage makers in the lead at +6% and cooling and vacuum cleaners witnessing -10% and -6% respectively. Audio home systems slumped at -30%. TVs were down by 6%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 - 30 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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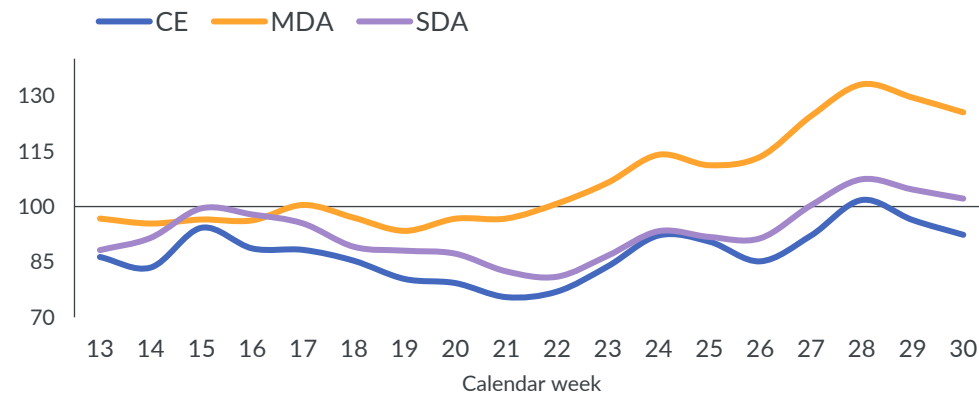
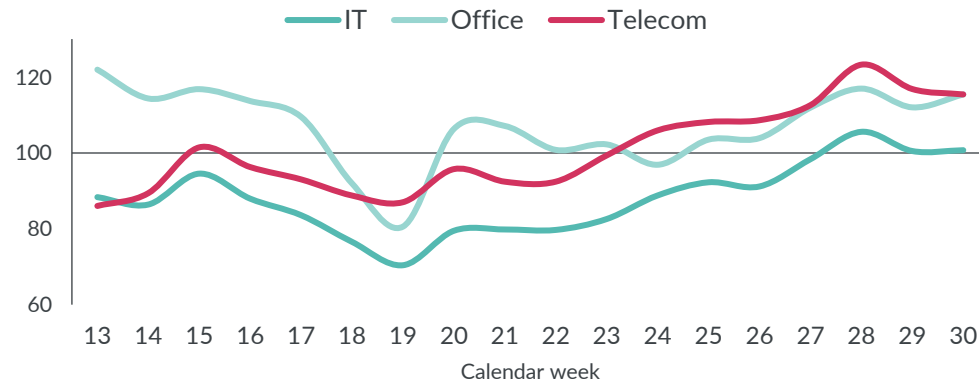
> Russia

Japan

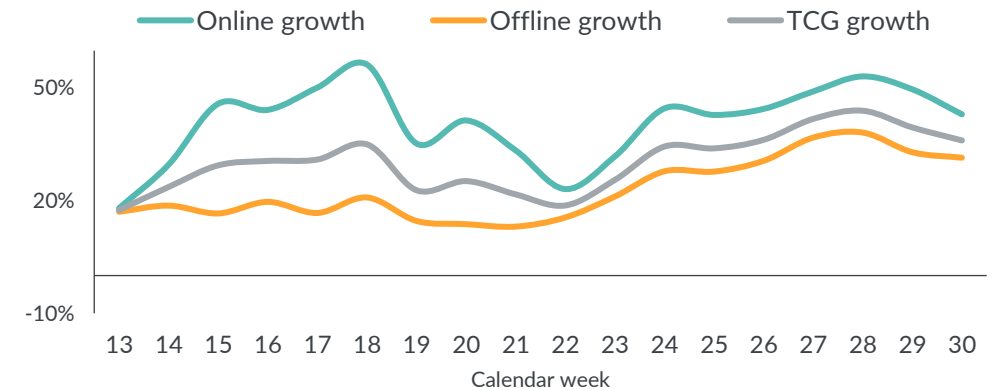
Brazil

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 30 (July 24 - July 30)



- The Russian TCG market continued its recovery, delivering +36% versus week 30 in 2022. Online sales at +43% were the driving force. Traditional retail added to it at +31%.
- Nearly all IT/Office categories accelerated to high double-digits except for desk computing at +10% and monitors at +17%. Media tablets were the best-performing product group at +66%. Smartphones were up 48%.
- Soundbars (+71%) delivered the highest growth rate within MDA/SDA/CE products. Air treatment at +53% was close. Food preparation was the weakest category at -2%. Dental care was up by just 5%.

Weekly retail insights from the Point of Sale

Spotlight on Japan



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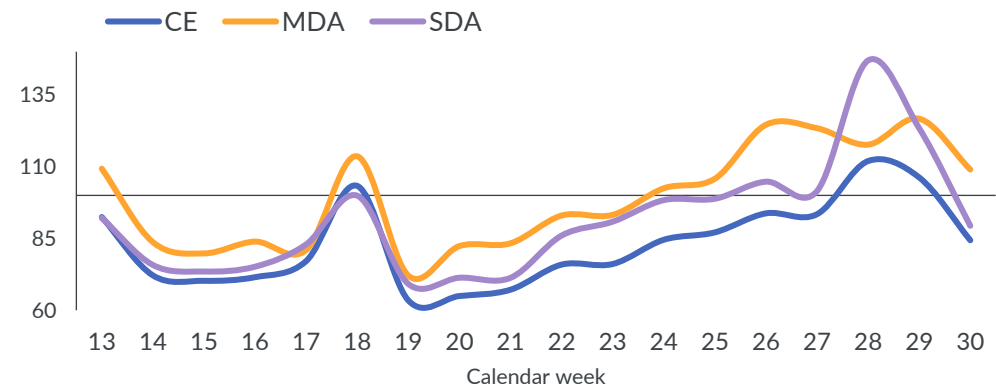
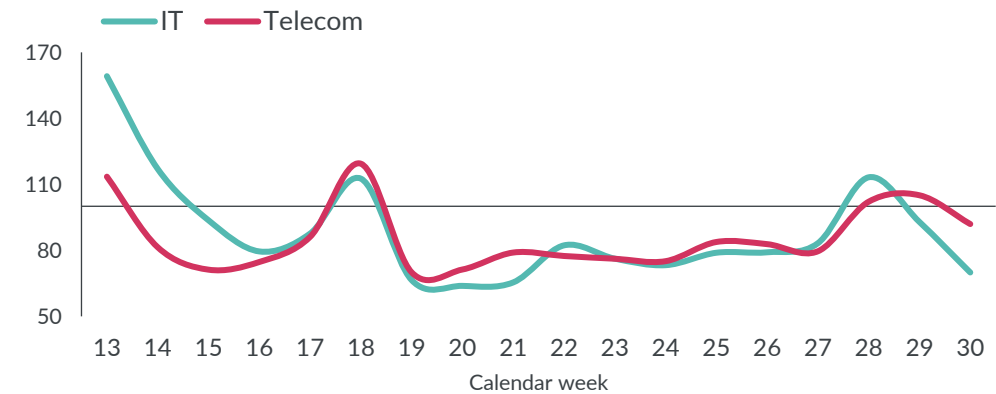
Russia

➤ Japan

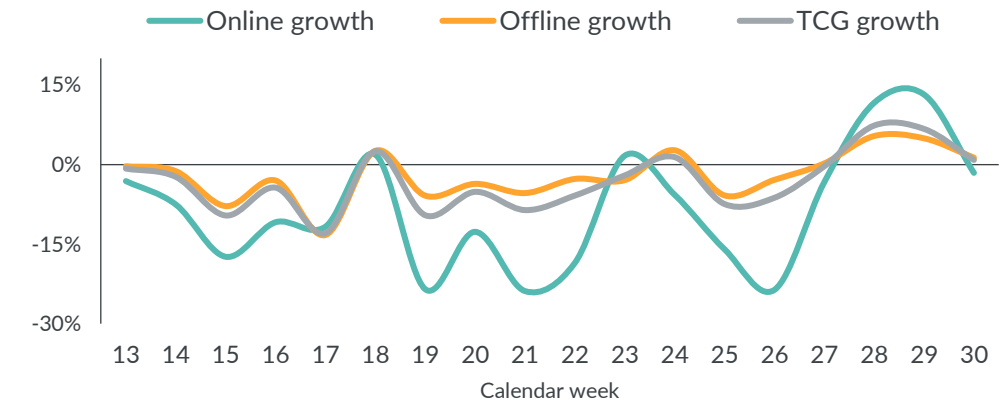
Brazil

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 30 (July 24 – July 30)



- In Japan, traditional retail drives the market. In week 30, it grew by a weak 1%. Online sales delivered -2% which did not have an impact on total TCG (+1%).
- The driver of this development was smartphones at +27%. Headsets at +17% added to it. Mobile computing slumped at -17%.
- Mixed trends for MDA/SDA/CE products saw soundbars and shavers in the lead at +20% and +14% respectively. Audio home systems at -21% marked the other end of the scale. Washing machines and food preparation were flat.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 30 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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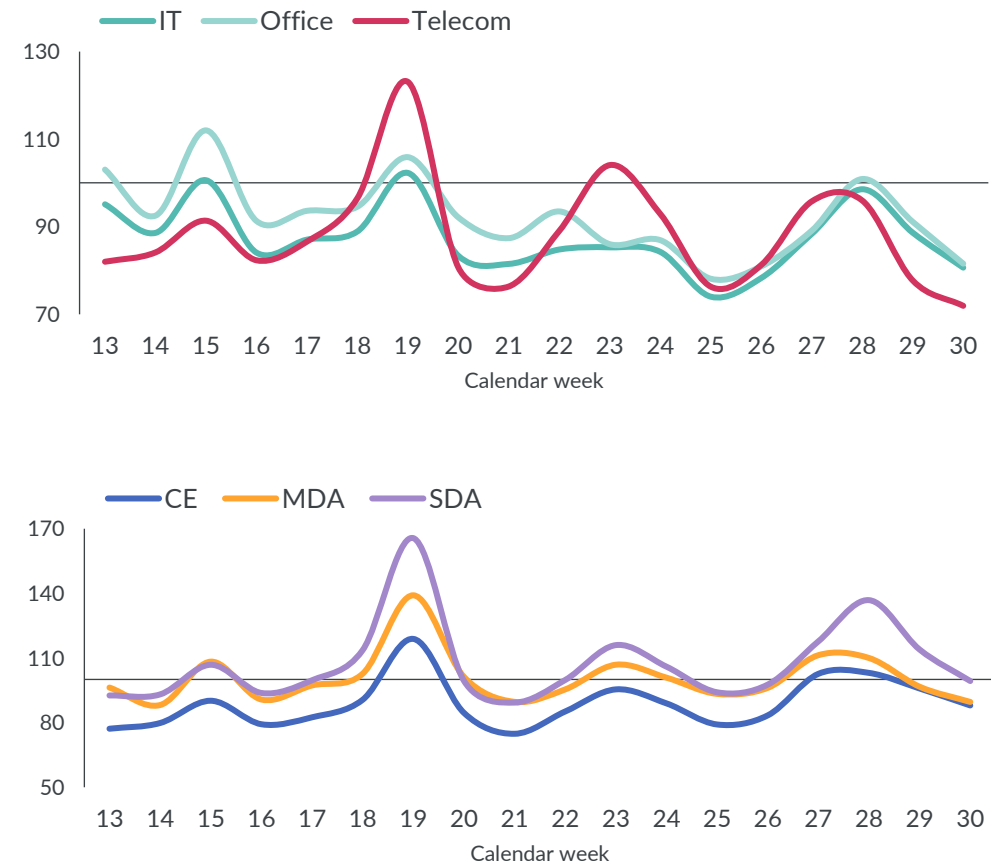
Russia

Japan

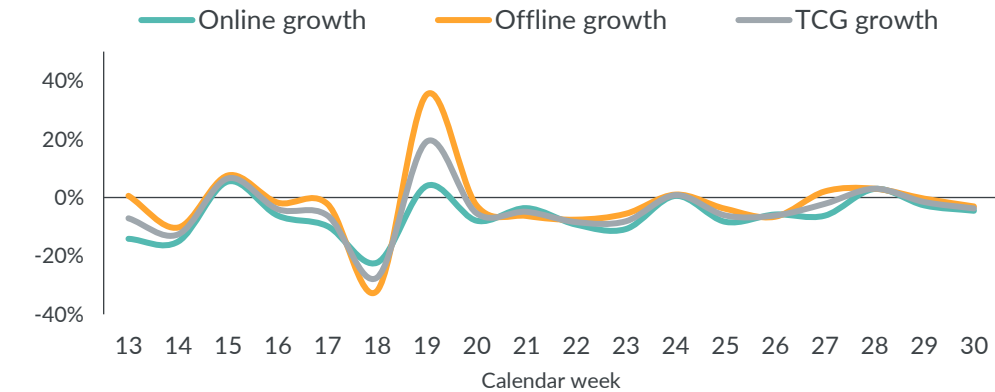
➤ Brazil

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 30 (July 24 – July 30)



- With trends of -5% for online sales and -3% for traditional retail, the total TCG market experienced a downswing of 4%.
- Media tablets at +34% were the best-performing category in week 30. Except for laser printers at +14%, all other IT/Office categories posted negative trends. Smartphones lagged, too, at -11%.
- The overall positive picture for MDA and SDA product groups delivered double-digit growth for hot beverage makers (+24%), shavers (+10%), and vacuum cleaners (+21%). Cooling was weak at +1%. TV sales experienced +4% in week 30 and audio home systems lost 24%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 30 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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Russia

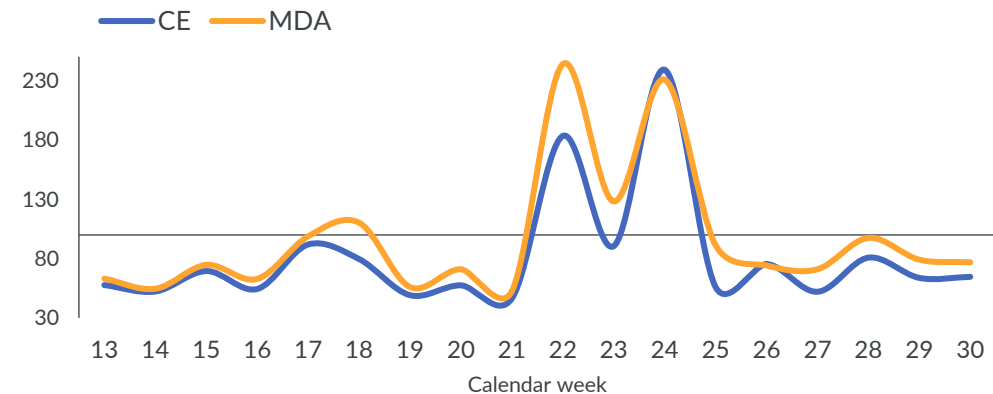
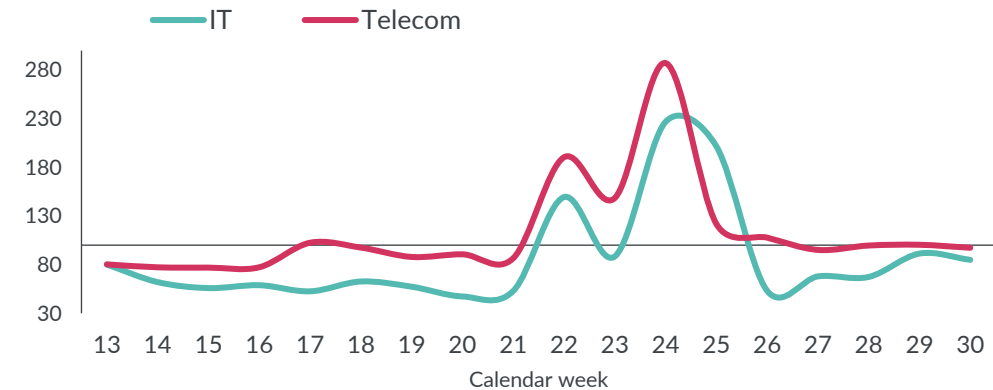
Japan

Brazil

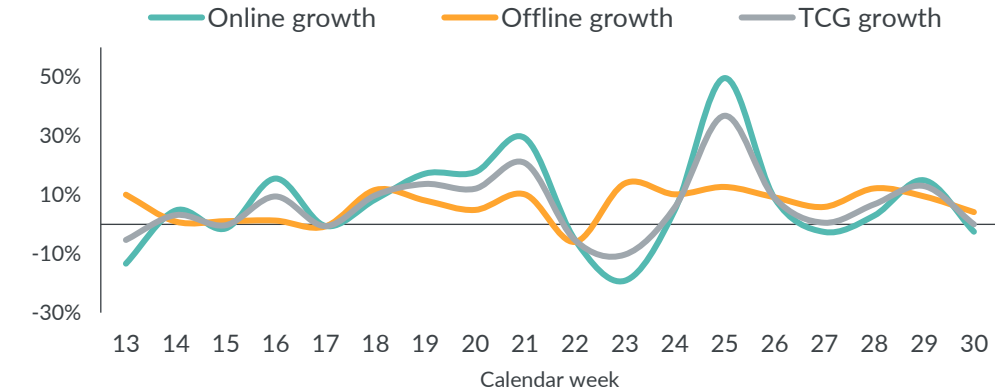


China

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 30 (July 24 – July 30)



- Positive traditional retail (+4%) and negative online sales (-3%) led to a flat total TCG market in week 30.
- Smartphones accelerated at 9%. Mobile computing delivered a minus of 8%.
- Week 30 in 2023 saw solid decreases for washing machines (-13%) and cooling (-10%). TV sales declined even more, at -21%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 30 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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