



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 169
cw33/2023

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> About **gfknewron**

Fact of the week

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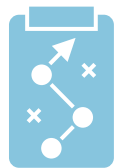
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Smart Home adoption is facing a deceleration in line with market deceleration



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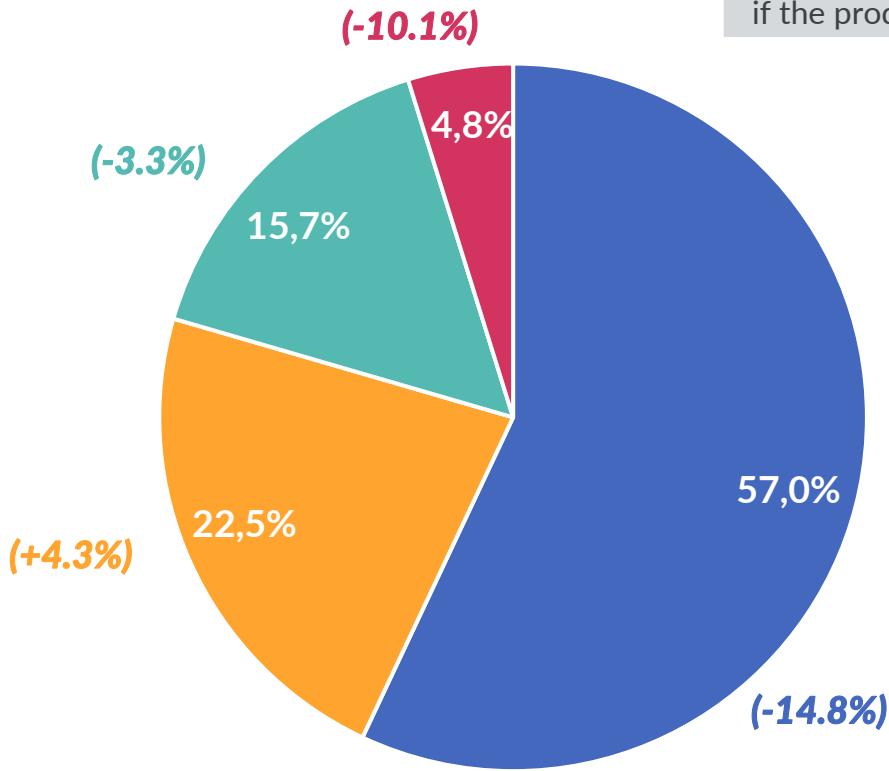
Russia

Japan

Brazil

China

EU7 | Sales Value USD % | Jan-Apr 2023 vs 2022



However, smart features and connectivity features are still one of the best levers for product premiumization if the product has the right use cases



Weekly retail insights from the Point of Sale

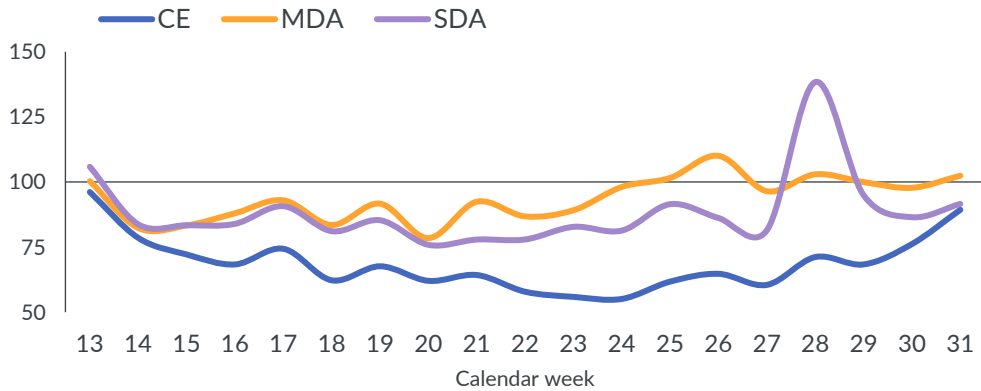
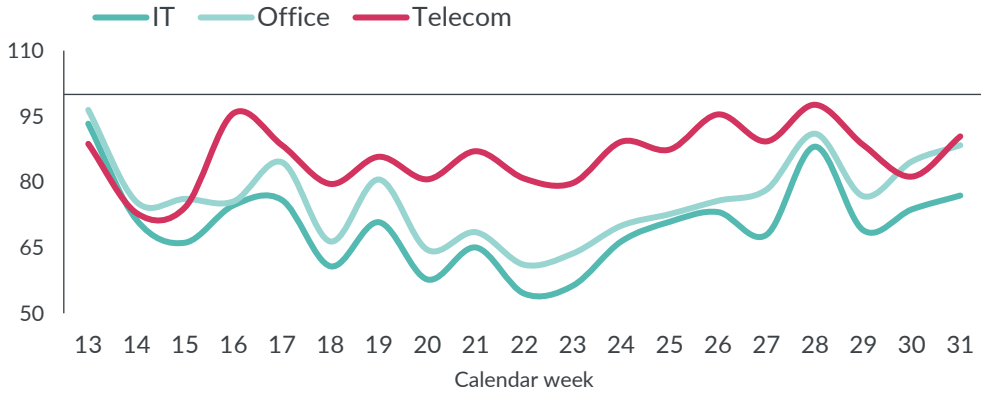
Spotlight on Germany



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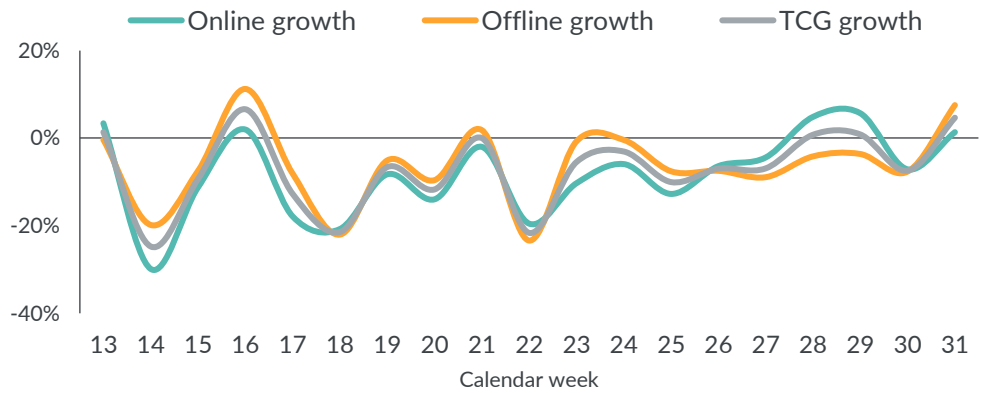
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

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 31 (July 31 – Aug 06)



- The recovery of traditional retail at +8% (-8% the previous week) lifted the total TCG market to +5%. Online sales at a small +1% added to it.
- Except for monitors at +14% and laser printers at +9%, IT/Office products posted negative trends led by desk computing at -20%. Smartphones were up 3% in week 31.
- For the first time in a long while, there were positive figures for CE products, with TVs accelerating by 26%. MDA/SDA categories delivered an overall positive picture except for air treatment at -59% and cooling at -14%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 31 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.

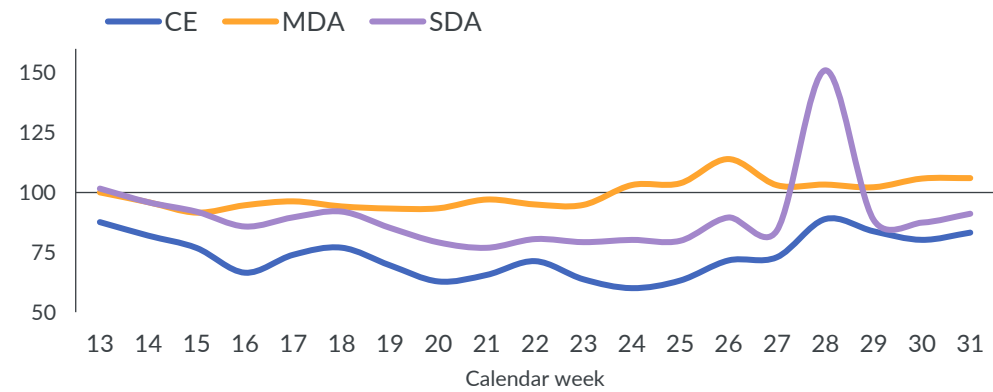
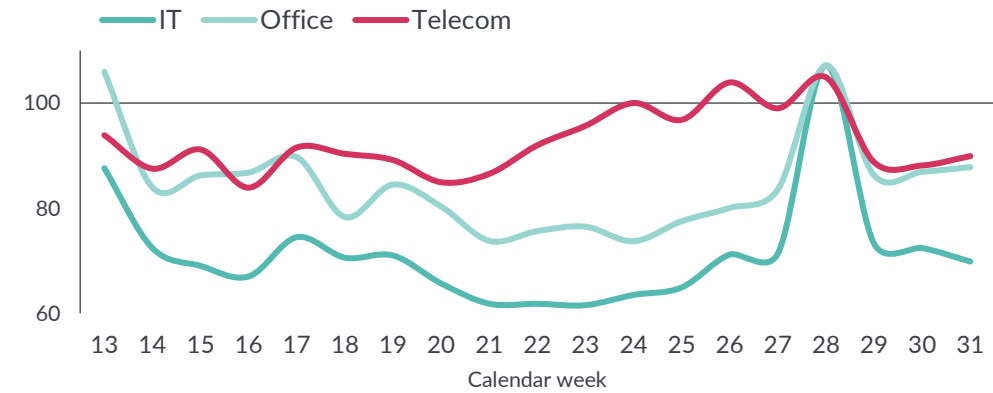
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

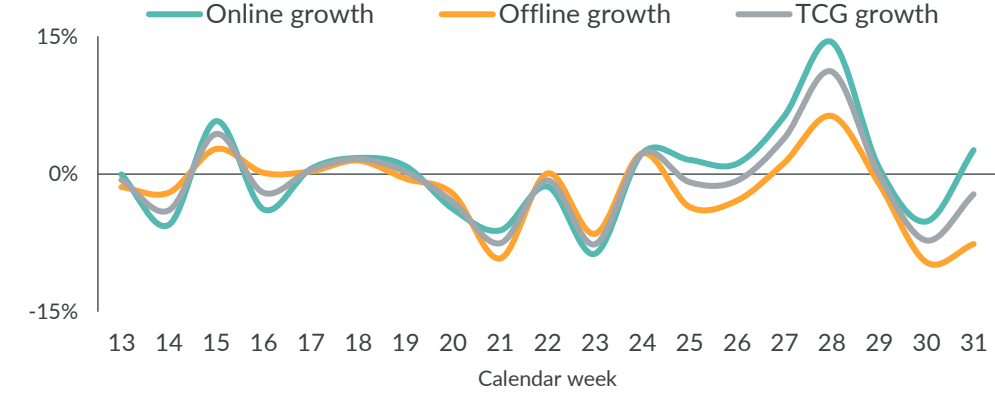


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 31 (July 31 – Aug 06)

- Deceleration of traditional retail (-8%) dragged the total TCG market down by 2%. Online sales at +3% were unable to compensate for the losses.
- Barring keyboards at 11% and inkjet printers at +2%, all other IT/Office categories witnessed negative trends with desk computing in the lead at -26% and mice hit least at -8%. Smartphones declined by 1%.
- The mixed picture for CE/MDA/SDA categories saw vacuum cleaners in the lead at +14% and audio home systems bringing up the rear at -7%. TV sales lagged at -1%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 31 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

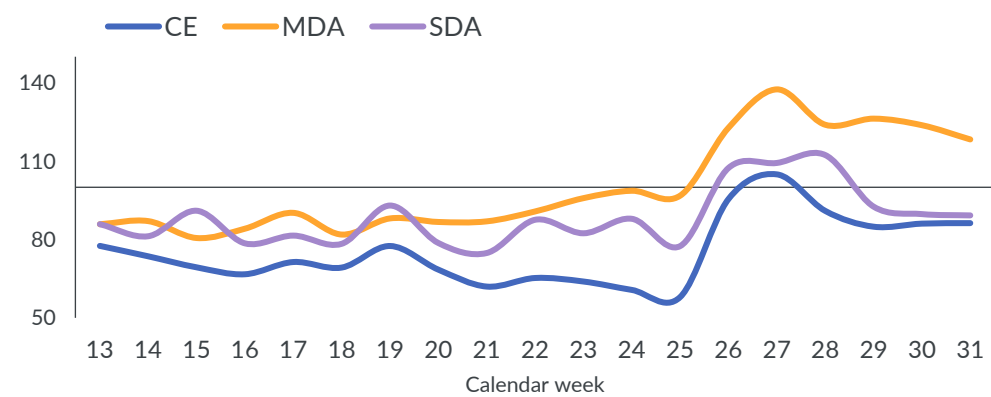
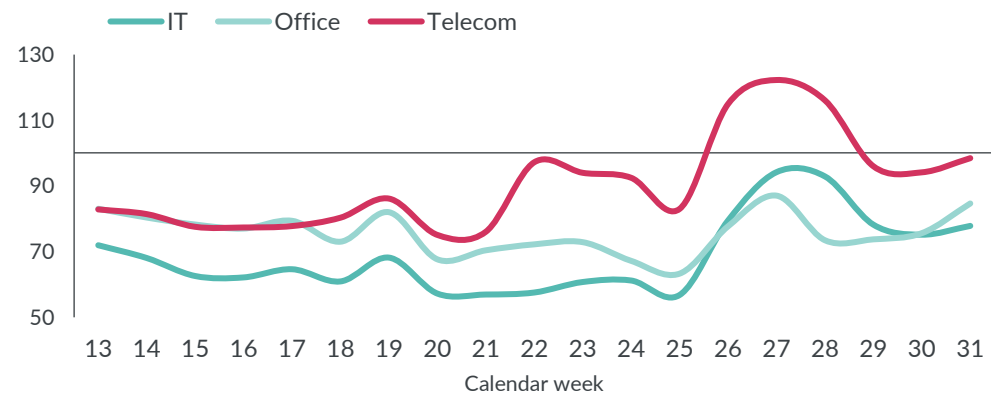
Weekly retail insights from the Point of Sale

Spotlight on France

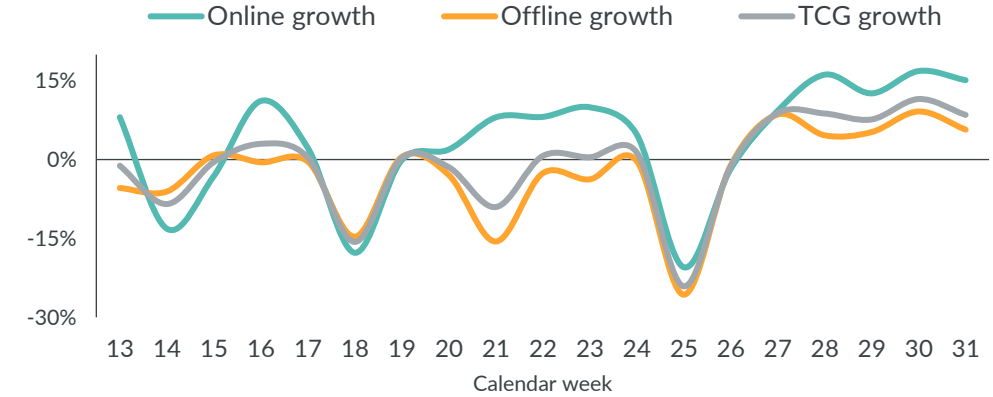


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 31 (July 31 - Aug 06)

- Good results for online sales (+15%) and traditional retail (+6%) boosted the total TCG market which delivered +8%.
- Contrasting trends within IT/Office saw mice in the lead at +25% and laser printers bringing up the rear at -7%. Mobile computing was flat. Smartphones accelerated at +11% and headsets were up 15%.
- In week 31, air treatment plummeted by 72%. Except for shavers at -10% and cooling at -2%, all other MDA/SDA categories delivered solid double-digit growth, led by dental care at +31%. TVs accelerated at +18%. Audio home systems were weak at +3%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 - 31 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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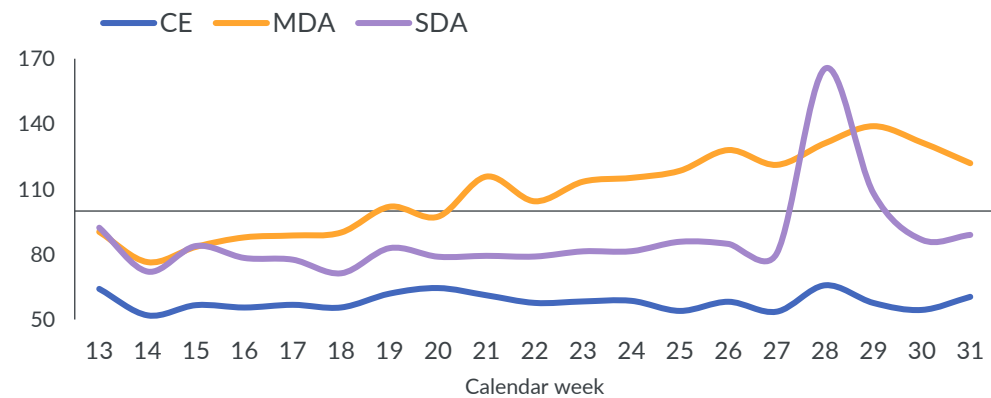
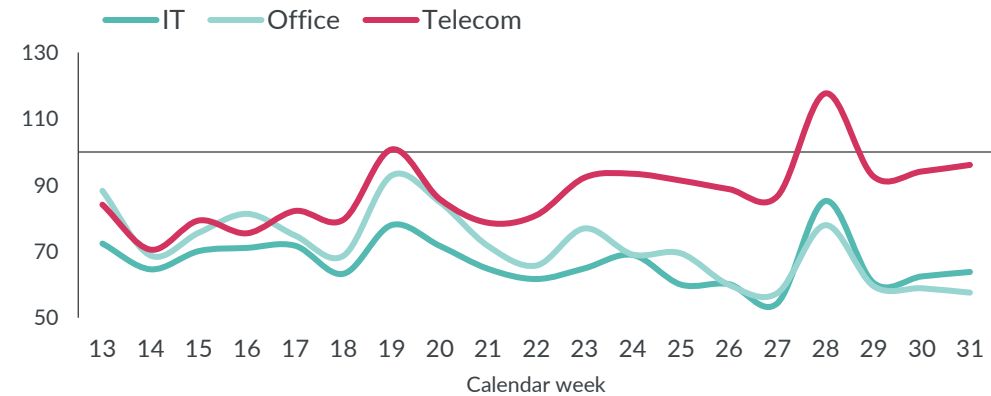
Russia

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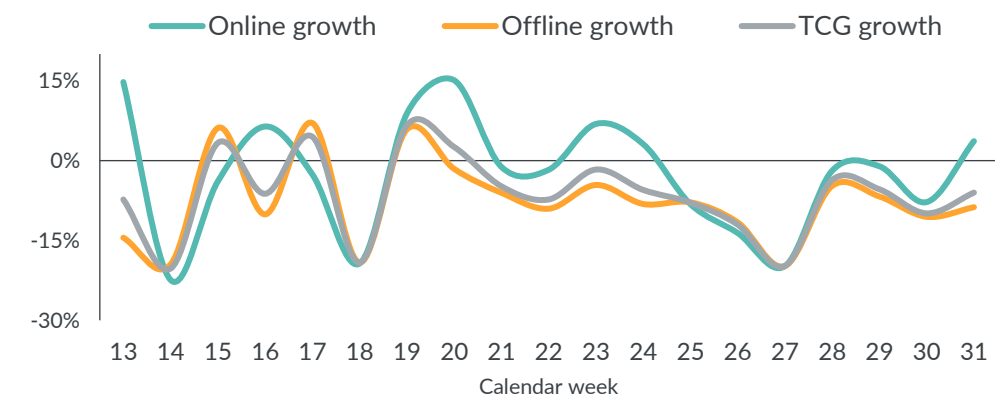
Brazil

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 31 (July 31 - Aug 06)

- Online sales experienced a plus of 4% versus week 31 in 2022, but this failed to compensate for the losses of traditional retail (-9%) and left the total TCG at a minus of 6%.
- All IT/Office products decreased by double digits, led by laser printers at -31%. Smartphones lagged at -4%.
- While CE products delivered negative trends (TVs posting -19%), MDA/SDA categories saw a mixed picture, ranging from -44% for air treatment to +11% for hot beverage makers.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 31 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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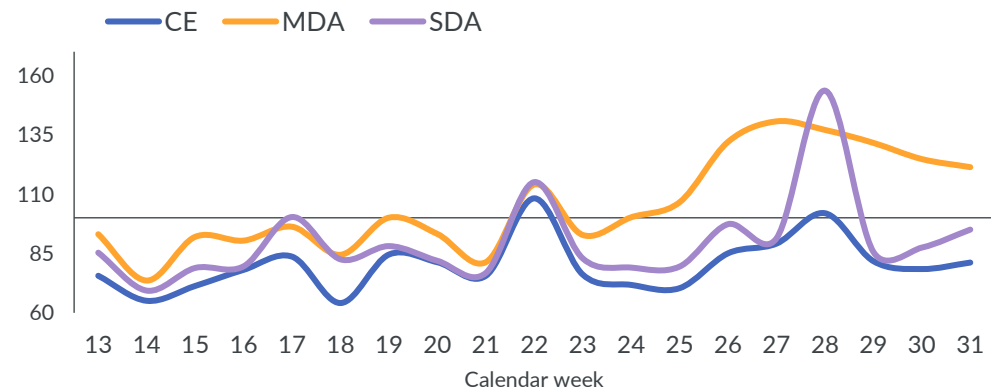
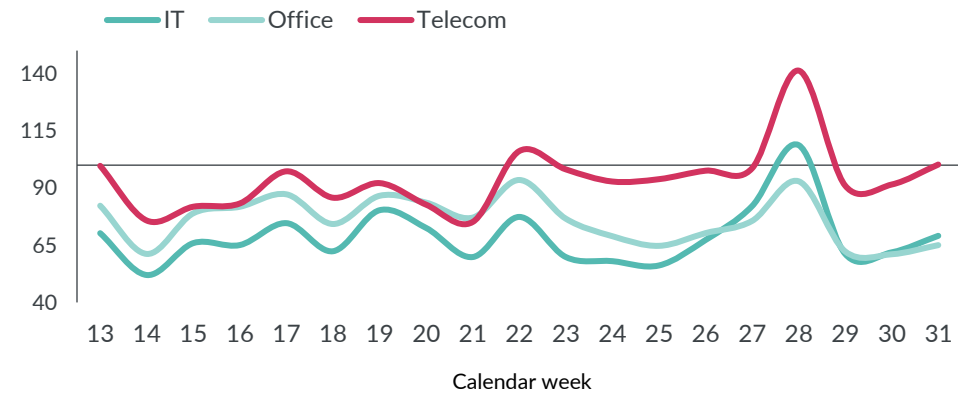
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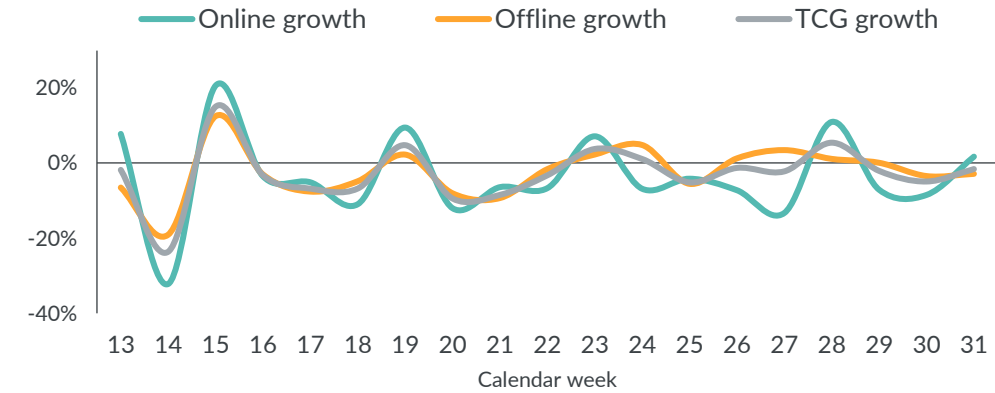
Brazil

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 31 (July 31 - Aug 06)



- Traditional retail experienced a minus of 3% versus week 31 in 2022. Online sales at a weak +2% were unable to balance out this performance, resulting in a slight downswing for the total TCG market of 2%.
- Desktop computing (-27%) was the worst-performing product group among IT/Office products. Laser printers slumped at -19%. Smartphones accelerated at +15%.
- MDA/SDA products delivered differing trends with cooling at -16% performing the worst and hot beverage makers up 8%. Washing machines were flat. Audio home systems slumped at -28%. TVs were down by 4%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 - 31 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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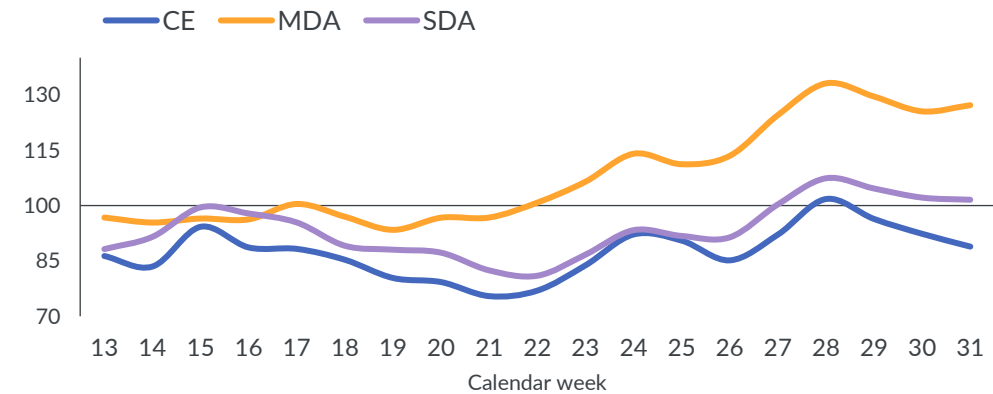
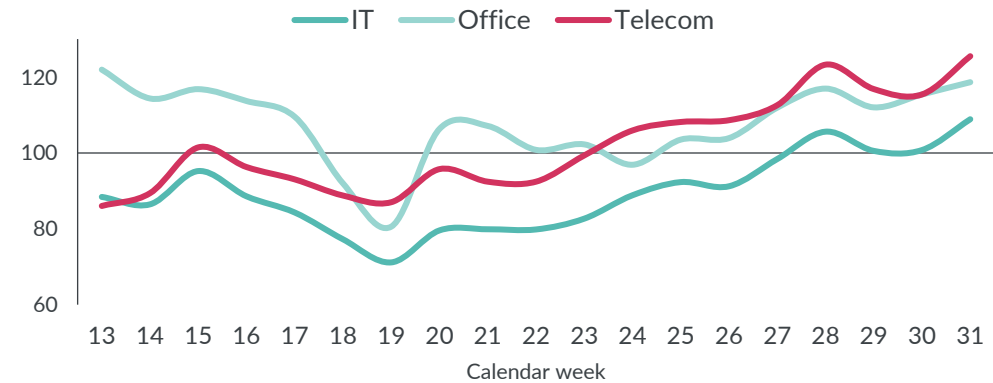
> Russia

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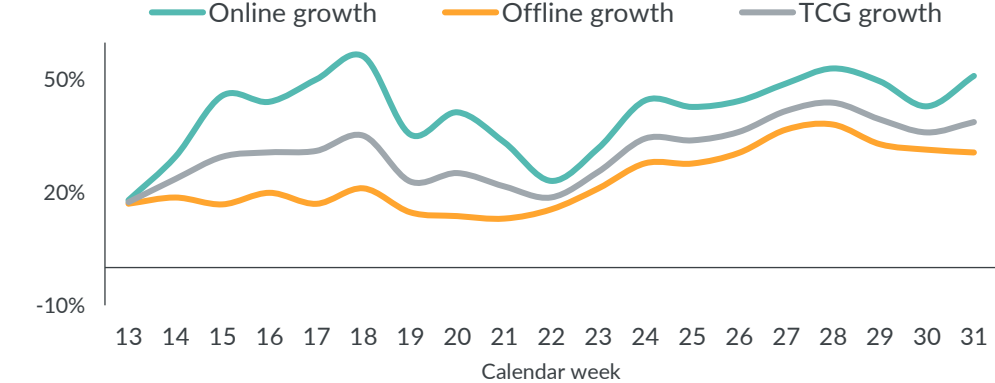
Brazil

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 31 (July 31 - Aug 06)



- The Russian TCG market continued its recovery, delivering +39% versus week 31 in 2022. Online sales at +51% were the driving force. Traditional retail added to it at +31%.
- Nearly all IT/Office and telecom categories accelerated by 30% or more, with keyboards out in front at +69%. Monitors and desk computing were slightly weaker, at +12% and +10% respectively. Smartphones were up 58%.
- Soundbars (+49%) delivered the highest growth rate within MDA/SDA/CE products. Air treatment at +38% and vacuum cleaners at +35% were close. Dental care was weak at +5% and food preparation even lost 1%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 31 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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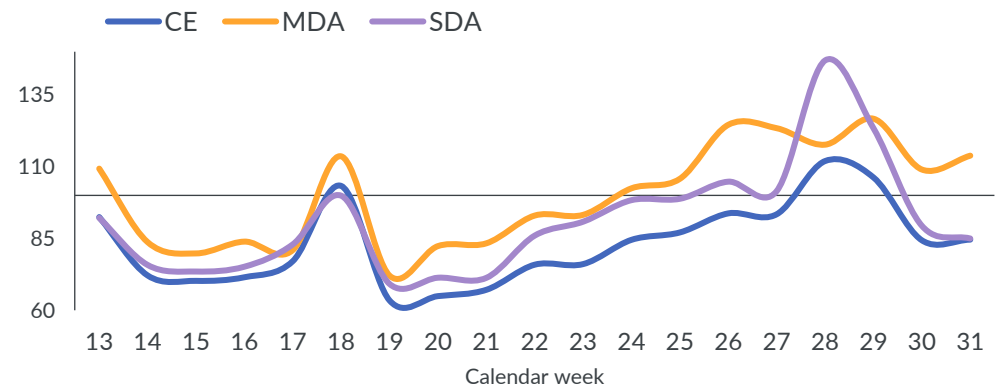
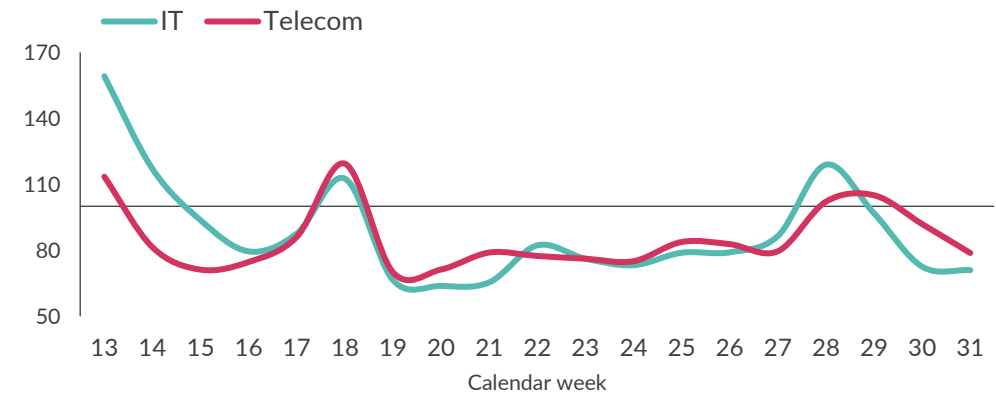
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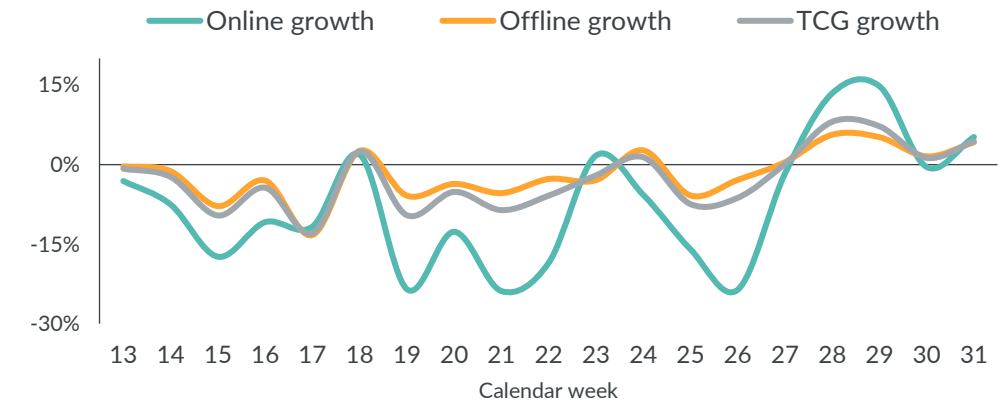
Brazil

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 31 (July 31 – Aug 06)



- Similar rates of +4% for traditional retail and +5% for online sales lifted the total TCG market by 4%.
- The driver of this development was smartphones at +30%. Headsets and media tablets added to it at +16% and +14% respectively. Mobile computing slumped at -13%.
- Mixed trends for MDA/SDA/CE products saw shavers and hot beverage makers in the lead at +20% and +14% respectively. Dental care was close at +12%. Audio home systems at -14% and air treatment at -12% marked the other end of the scale.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 31 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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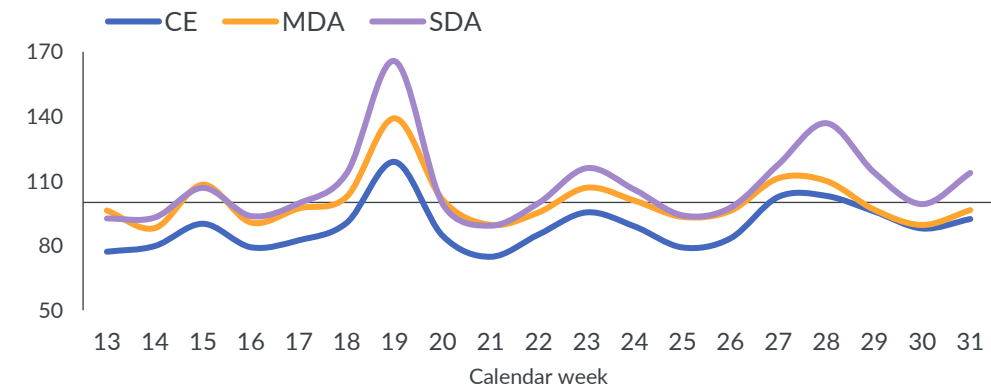
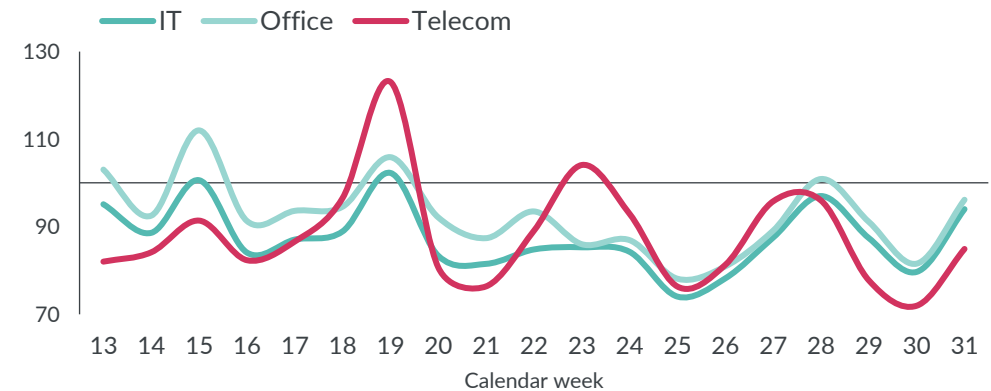
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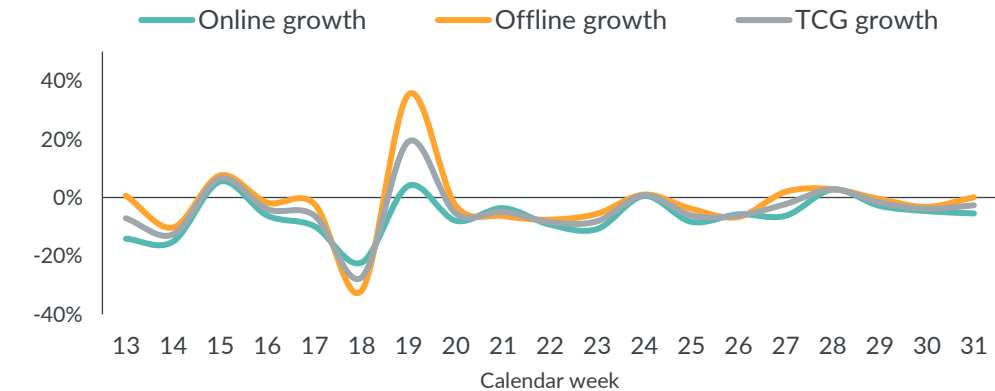
➤ Brazil

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 31 (July 31 – Aug 06)



- Online sales delivered -5%, but flat traditional retail failed to convert the total TCG market to positive growth, leaving it at -3%.
- While media tablets at +44% were the best-performing category in week 31, mobile computing slumped at -16%. Smartphones lagged at -8%.
- The overall positive picture for MDA and SDA product groups delivered double-digit growth for all categories (hot beverage makers posting +24%), except for washing machines at +8%. TV sales experienced -4% in week 31 and audio home systems lost 16%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 31 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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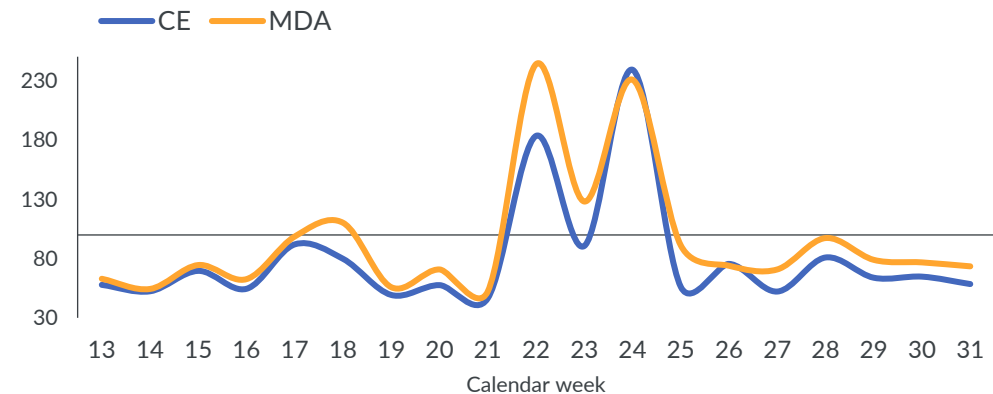
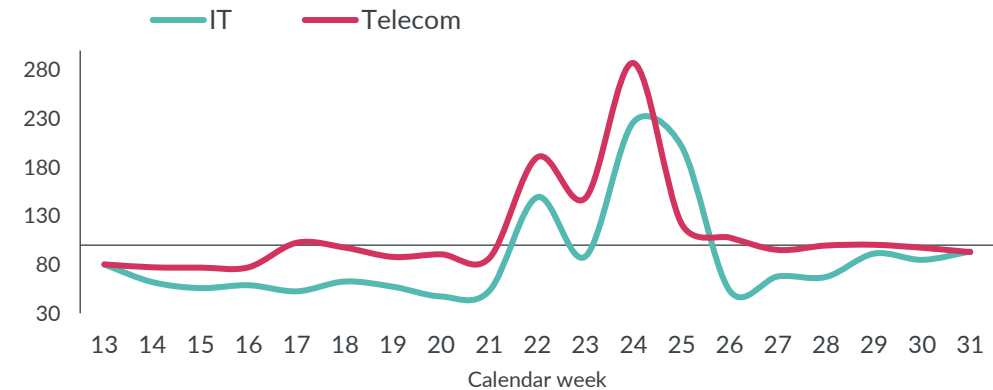
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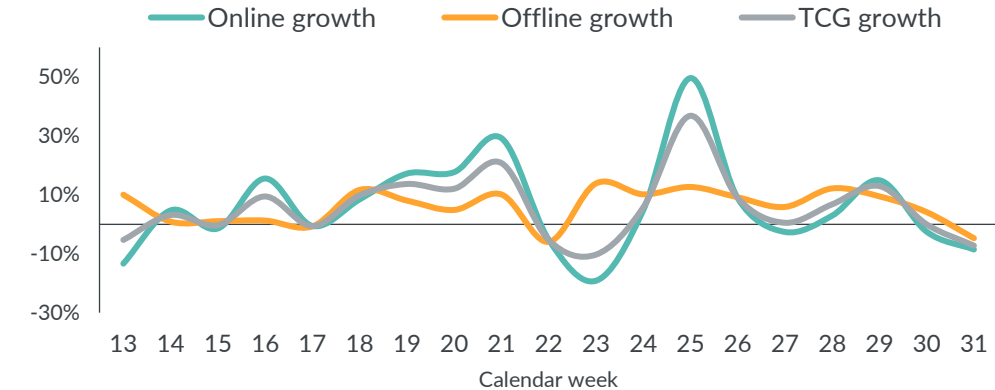
Brazil

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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 31 (July 31 – Aug 06)



- Deceleration of online sales (-9%) dragged the total TCG market down by 7%. Traditional retail added to it by delivering -5%.
- Smartphones decelerated at 4%. Mobile computing delivered a minus of 12%.
- Week 31 in 2023 saw solid decreases for TV sales (-16%). Washing machines were down by 6%. Cooling at -0.9% was nearly flat.



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