



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 170
cw34/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

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Spain

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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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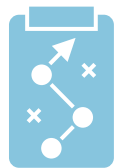
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Fact of the Week

The war and resulting energy crises spiked the demand for programmable thermostats



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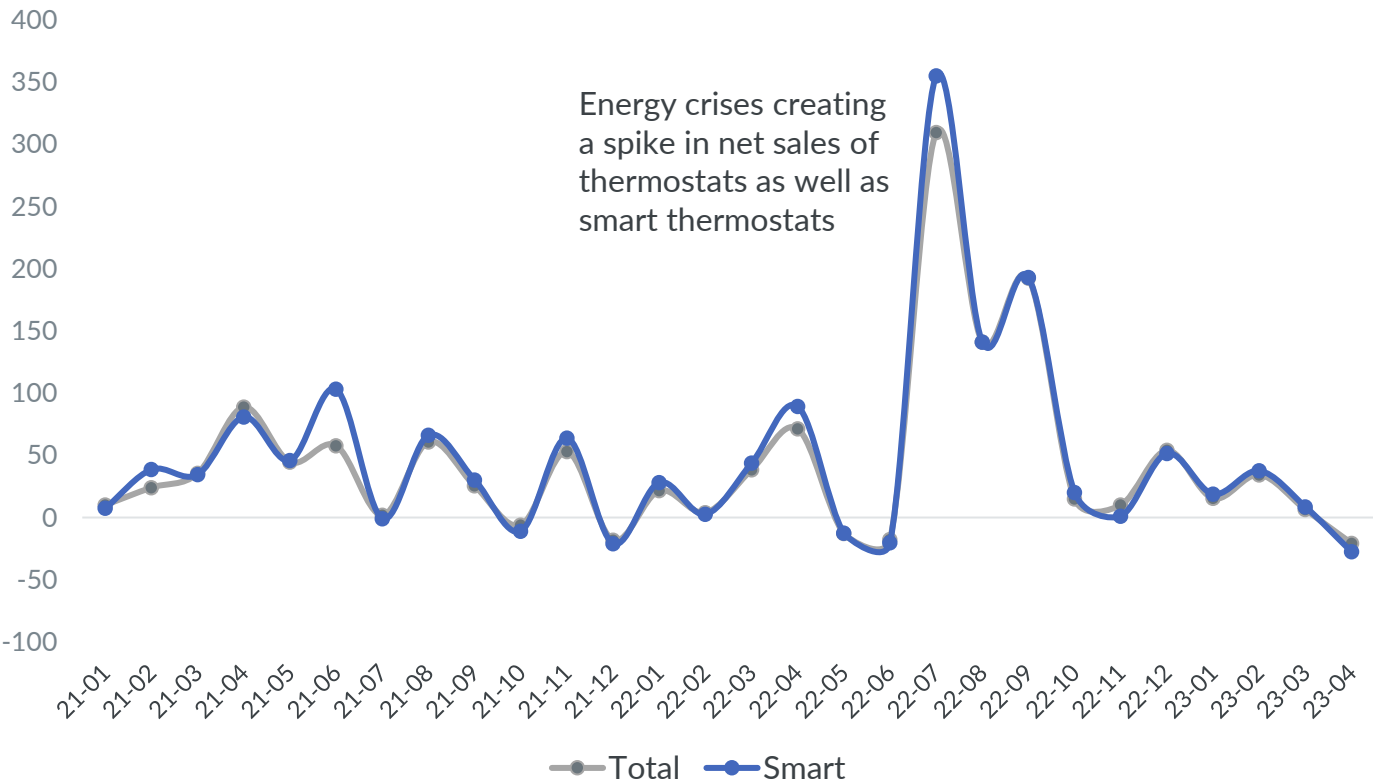
44%

% of respondents saying energy saving is good for environment

Price development US \$

Programmable Thermostats	Apr 21	Apr 22	Apr 23
Total Category	68\$	69\$	78\$
Smart Products	84\$	77\$	93\$

Sales Value Mio USD growth %



Source: Market Intelligence Sales Tracking Period: Jan 21-Apr 23 , Sales Value Mio USD growth EU4: DE, FR, ES, IT
Measure. Control. Act : Smart Home Dynamics 2023-NF

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.

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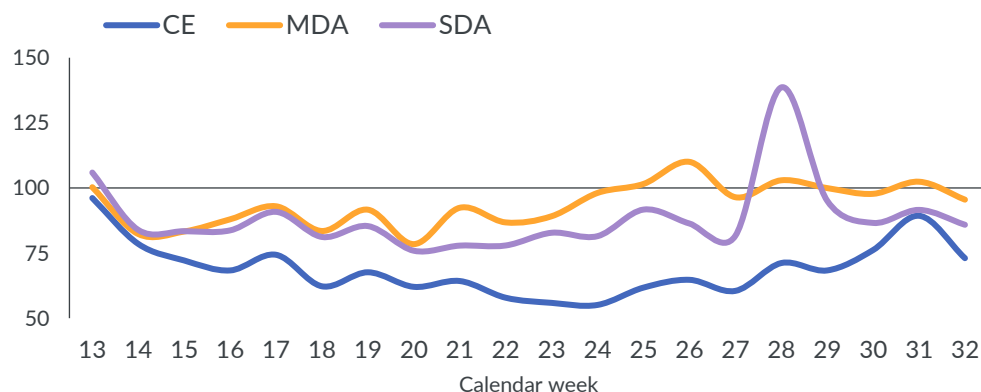
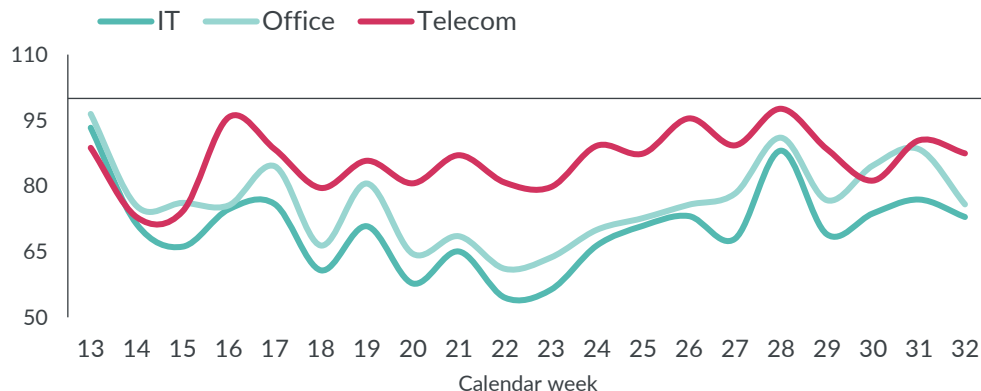
Russia

Japan

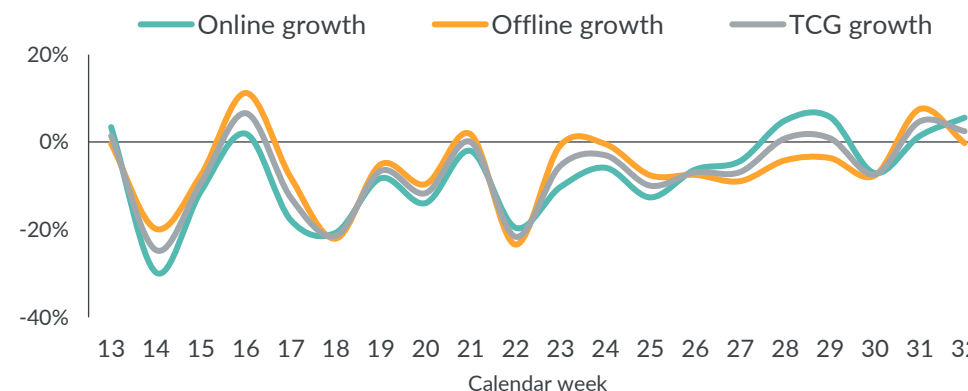
Brazil

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 32 (Aug 07 – Aug 13)



- Traditional retail was flat in week 32 but online sales accelerated by 6% and lifted the total TCG market to +2%.
- Except for monitors at +12%, all other IT/Office products posted negative double-digit negative trends between -14% and -19%. Smartphones increased by 8% in week 32.
- Air treatment (-49%) again was the worst-performing product group within MDA/SDA/CE products. There was a mixed picture across these categories, ranging from -24% for cooling to +23% for dental care. TV sales increased by 7%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 32 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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.

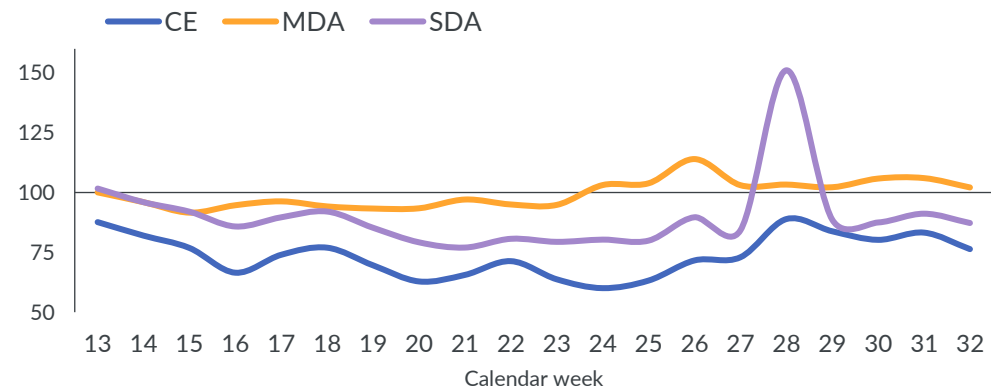
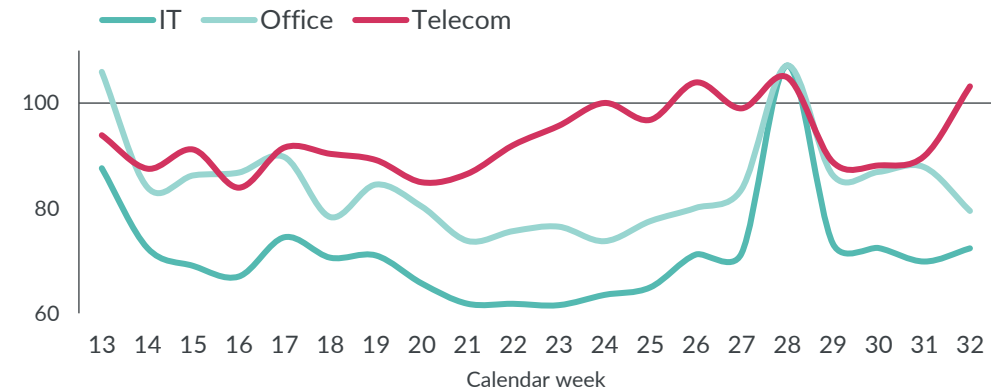
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

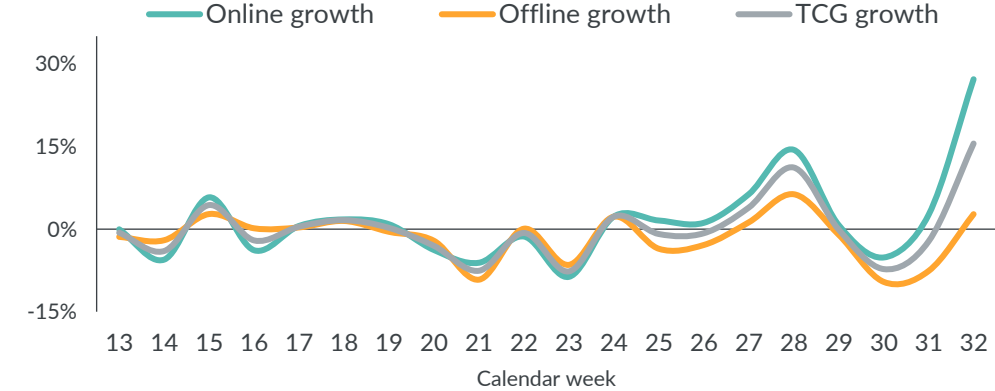


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 32 (Aug 07 – Aug 13)



- Online sales experienced quite a shift in week 32, posting +27% versus +3% in week 31, which lifted the total TCG market to +16%. Traditional retail at +3% added to it.
- The main driver of this development was smartphones (+30%). The picture for IT/Office was mixed, ranging from +34% for keyboards to -26% for desk computing. Inkjet printers were flat.
- Vacuum cleaners at +27% added to the good result of TCG. Within MDA/SDA/CE categories, only audio home systems (-18%), cooling (-10%), and shavers (-5%) posted negative trends.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 32 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

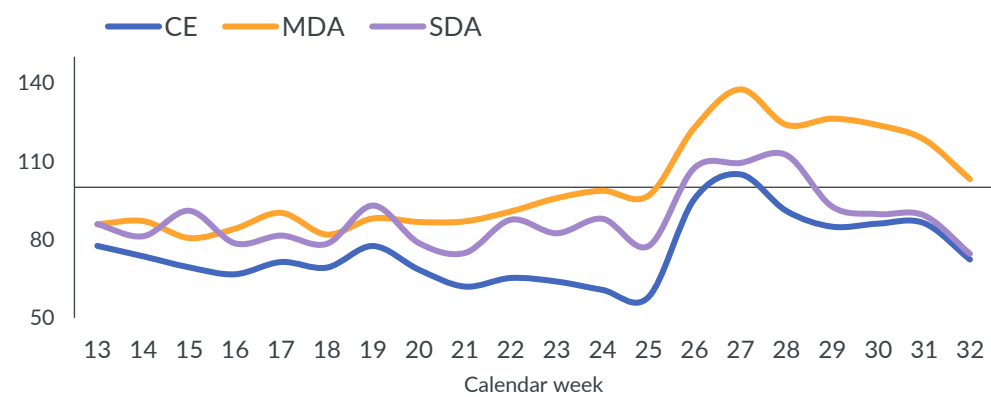
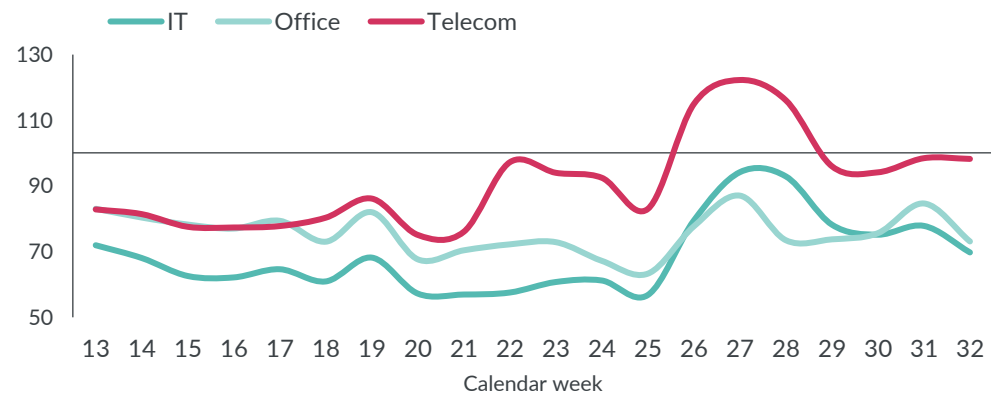
Weekly retail insights from the Point of Sale

Spotlight on France

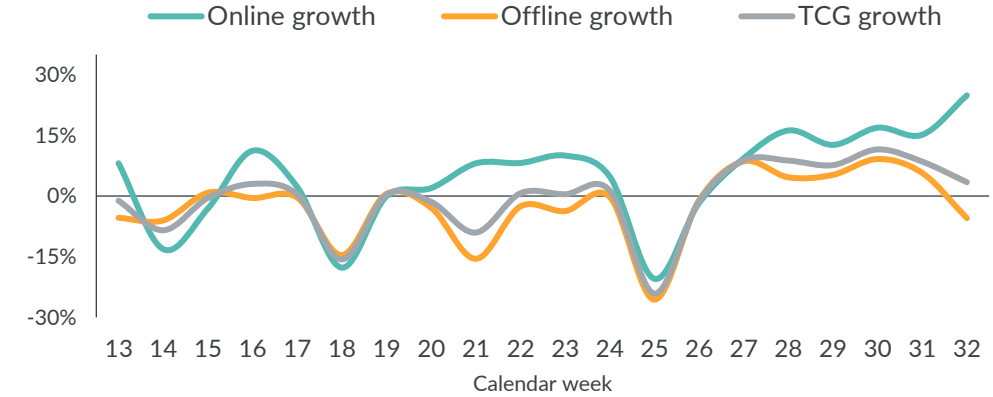


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 32 (Aug 07 - Aug 13)

- Online sales developed well in week 32 (+25%, up from +15% the previous week), but decreasing traditional retail (-6%) left the total TCG market at a weak +3%.
- IT/Office products ranged from +12% for media tablets to -26% for laser printers. Smartphones accelerated at +27%. Headsets were up 13%.
- Air treatment (-69%) was again the worst-performing product group within MDA/SDA/CE products. The week saw a mixed picture across those categories, ranging from -15% for cooling to +12% for dental care. TV sales increased by 5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 32 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



About **gfknewron**

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Germany

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France

➤ Italy

Spain

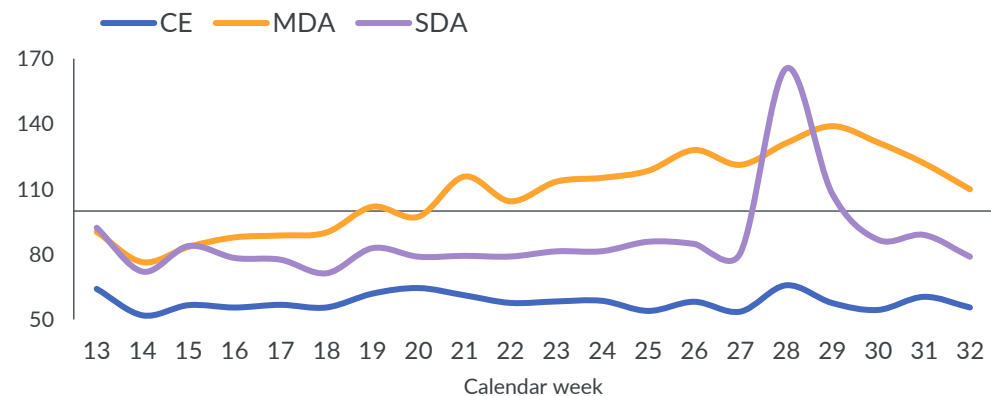
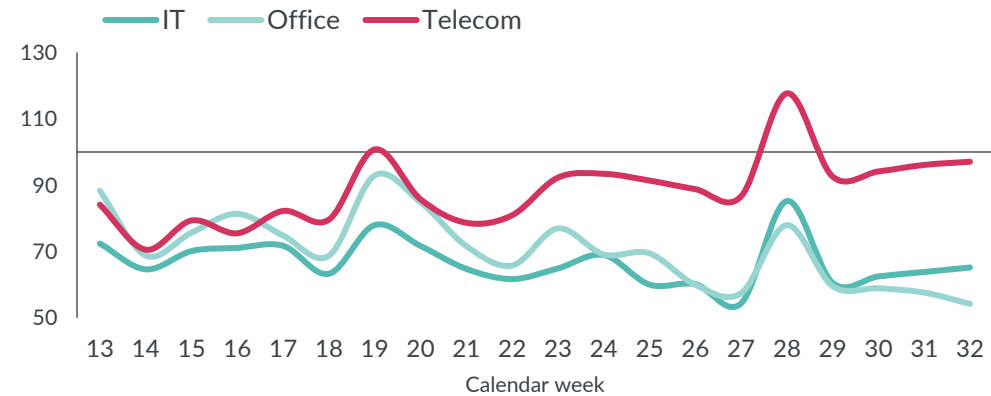
Russia

Japan

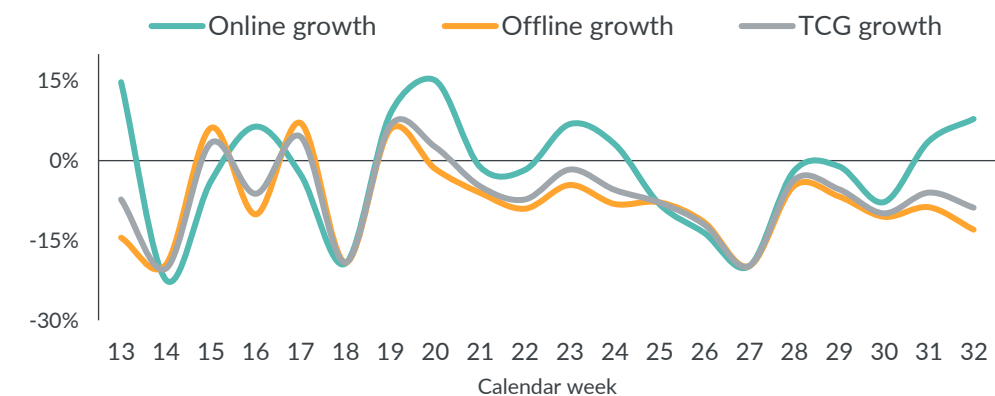
Brazil

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 32 (Aug 07 - Aug 13)



- Online sales experienced a plus of 8% versus week 32 in 2022, but this failed to compensate for the losses of traditional retail (-13%) and left the total TCG at a minus of 9%.
- Except for media tablets at -6%, all other IT/Office products decreased by double digits, led by mobile computing at -26%. Smartphones were up 2%.
- Air treatment was the worst-performing category in week 32, at -39%. MDA/SDA categories overall posted negative trends, except for washing machines at +6% and hot beverage makers at +5%. Food preparation was flat. CE products lost in solid double digits (TVs posting -33%).

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 32 2023; 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, 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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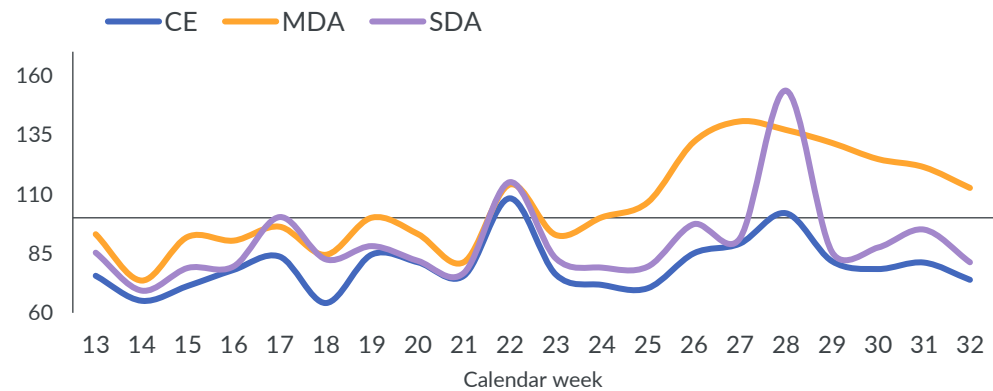
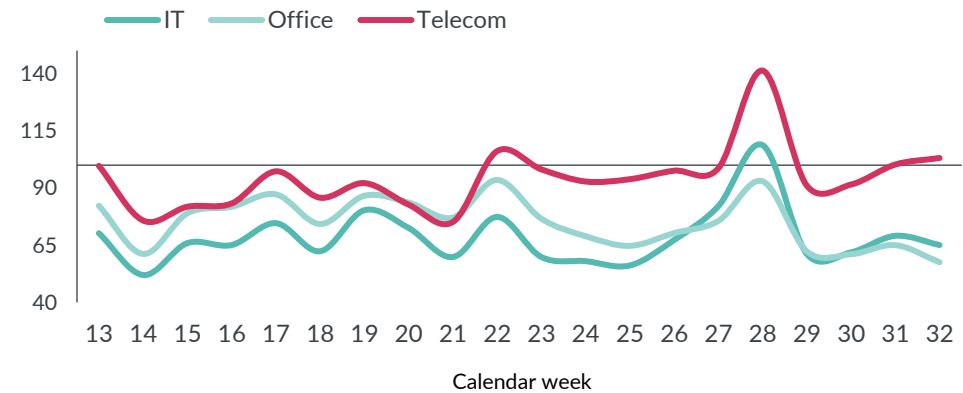
Russia

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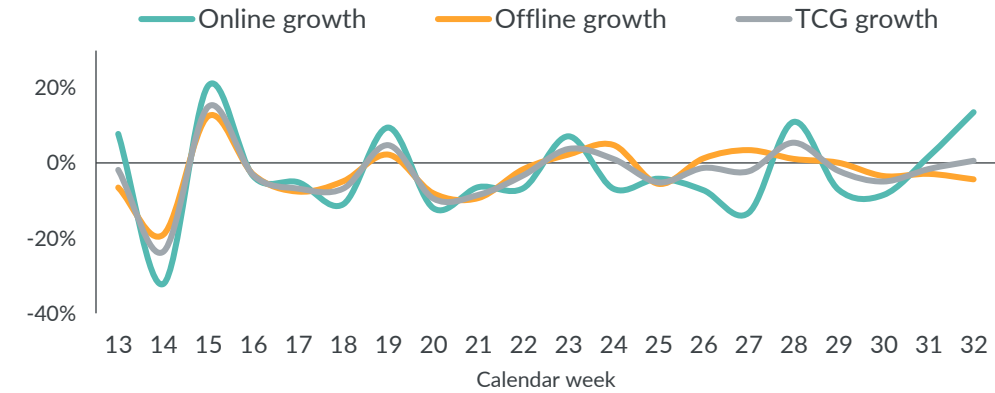
Brazil

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 32 (Aug 07 - Aug 13)



- Traditional retail experienced a minus of 4% versus week 32 in 2022. Online sales at +14% were able to balance that out, resulting in a slight uptick for the total TCG market of 1%.
- While media tablets at +32% were the driver of the IT/Office categories, mobile computing and desk computing slumped at -19% and -14% respectively. Smartphones accelerated at +27%.
- CE products were hit strongly, all delivering double-digit negative rates, with audio home systems in the lead at -36%. MDA/SDA was less negative, with hot beverage makers out in front at +9%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 32 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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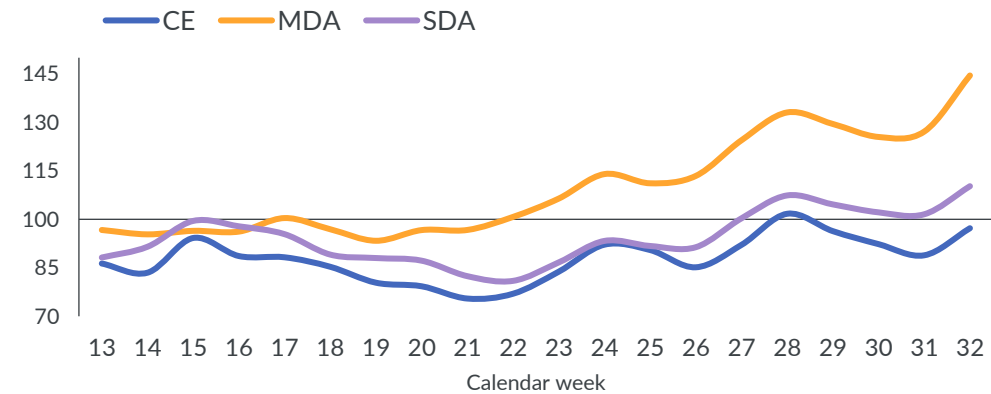
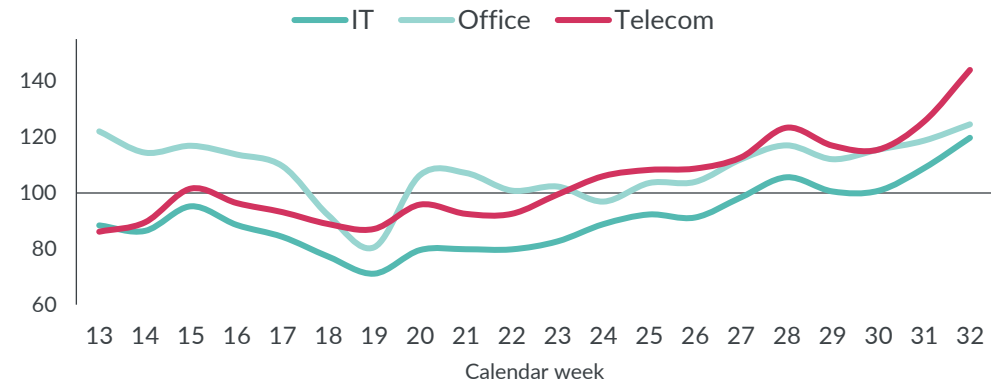
> Russia

Japan

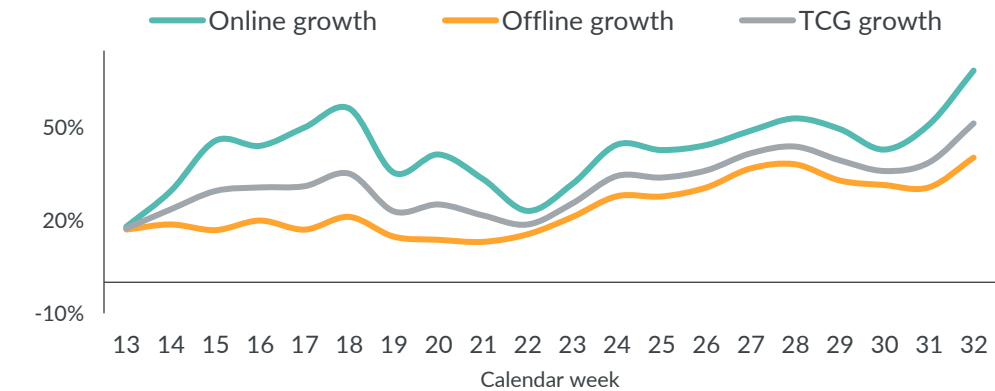
Brazil

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 32 (Aug 07 - Aug 13)



- The Russian TCG market continued its recovery, delivering +51% versus week 32 in 2022. Online sales at +69% were the driving force. Traditional retail added to it at +40%.
- Nearly all IT/Office and telecom categories increased by 30% or more, with media tablets out in front at +65%. Monitors were the weakest category at +13%. Smartphones accelerated at +73%.
- MDA/SDA/CE products delivered +40% or more, except for shavers at +21%, dental care at +10%, and food preparation at +5%. TV sales were up 39%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 32 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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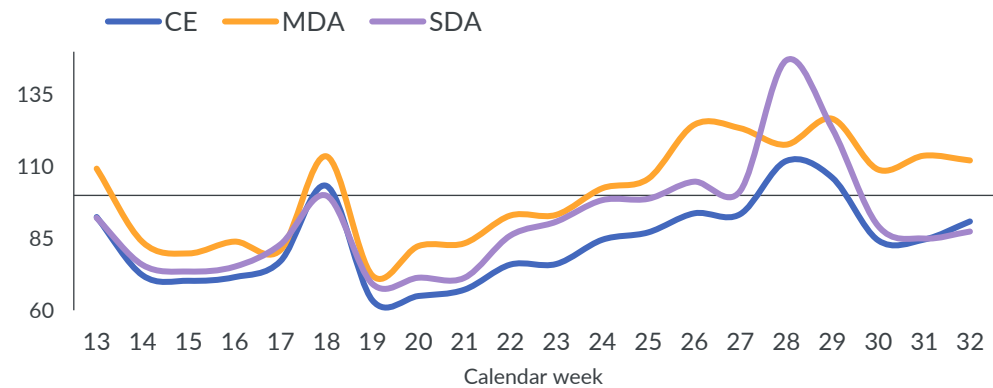
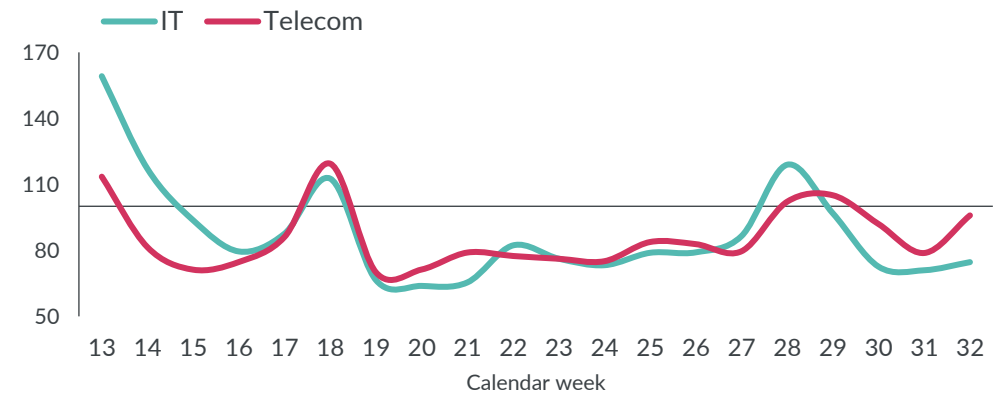
Russia

➤ Japan

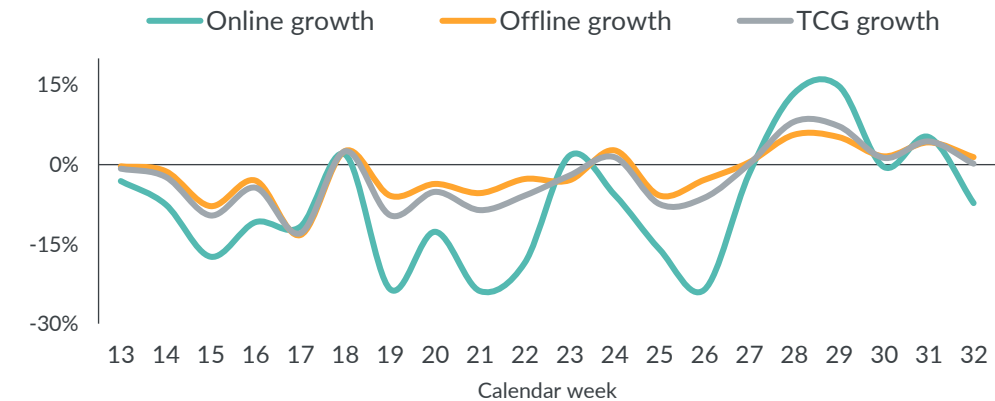
Brazil

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 32 (Aug 07 – Aug 13)



- Online sales delivered -7%. Combined with weak traditional retail at +1% this resulted in a flat total TCG market.
- Mobile computing and media tablets both decelerated at -15% and -8% respectively. While smartphones delivered +23%, headsets lagged at -6%.
- Mixed trends for MDA/SDA/CE products saw hot beverage makers in the lead at +17%. Audio home systems at -21% and air treatment at -15% marked the other end of the scale. Cooling was flat. TV sales delivered -7%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 32 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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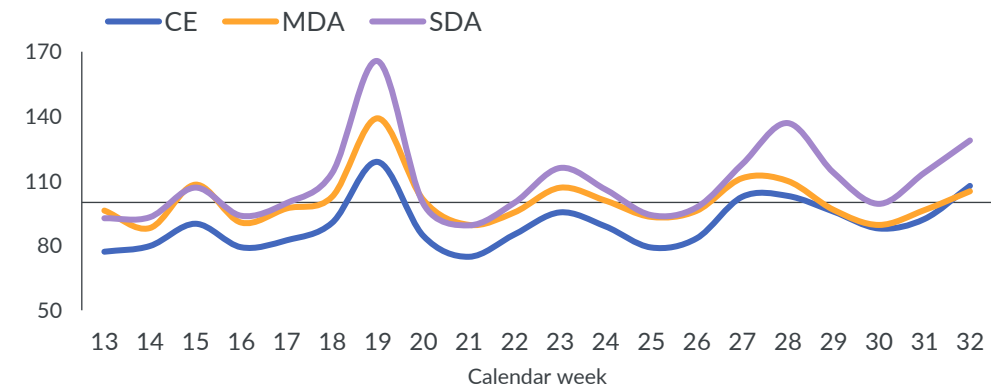
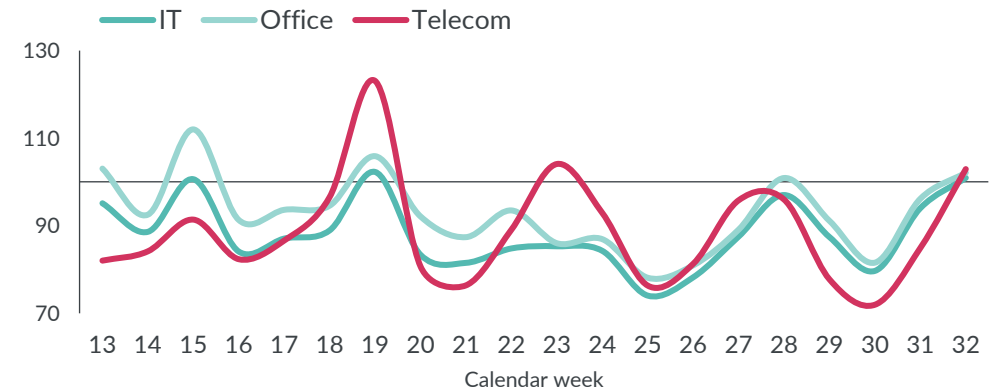
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Japan

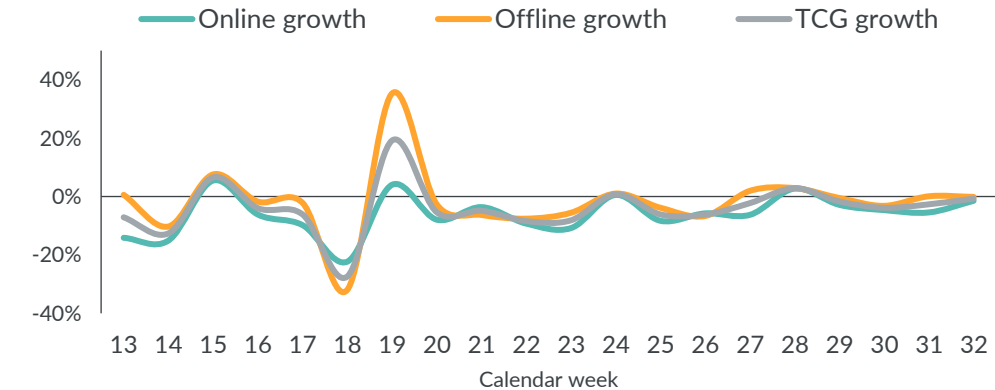
➤ Brazil

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 32 (Aug 07 – Aug 13)



- Flat traditional retail and weak online sales at -1% dragged the total TCG market down by 1%.
- Media tablets at +36% were the best-performing category in week 32, while all other IT/Office categories posted negative trends, with mobile computing delivering -15%. Smartphones lagged at -6%.
- The overall positive picture for MDA and SDA product groups was determined by double-digit growth for most categories apart from +3% for washing machines. TV sales experienced +3% in week 32 and audio home systems lost 12%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 32 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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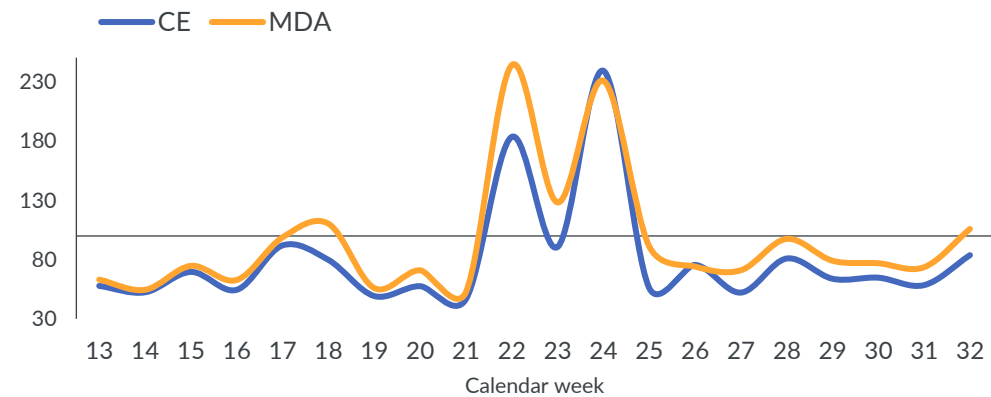
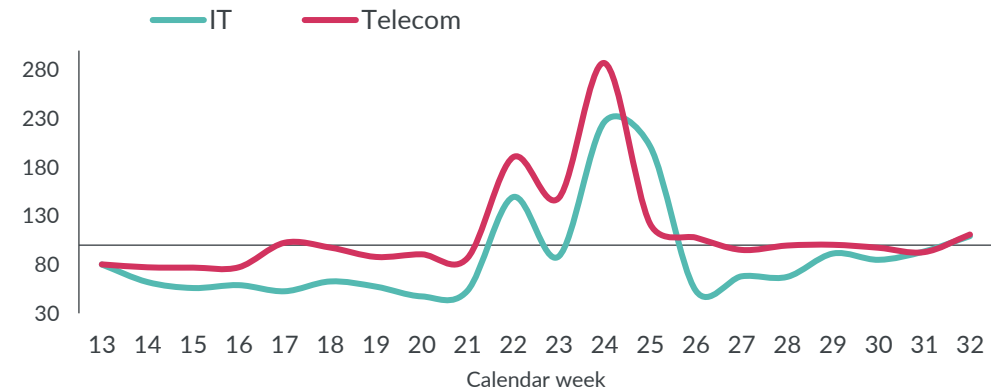
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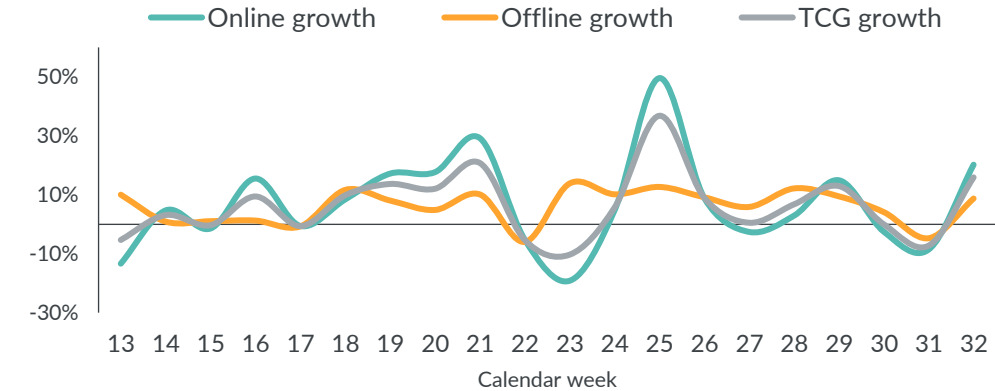


China

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 32 (Aug 07 – Aug 13)



- A good recovery for online sales (+20% in week 32 versus -9% in week 31) lifted the total TCG market to a solid plus of 16%. Traditional retail at +9% added to it.
- Smartphones were the driving force of this development, accelerating at +33%. Mobile computing delivered a minus of 5%.
- Week 32 in 2023 saw decreases for washing machines (-6%) and cooling (-4%). TVs were the worst-performing product group at -26%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 32 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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