



An NIQ  
Company

# State of consumer technology and durables sales tracker

Weekly trends and insights for  
the tech and durables market

Edition 171  
cw35/2023

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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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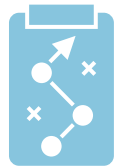
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# Fact of the Week

Sales of Digital Still Cameras improved towards YTD 2022



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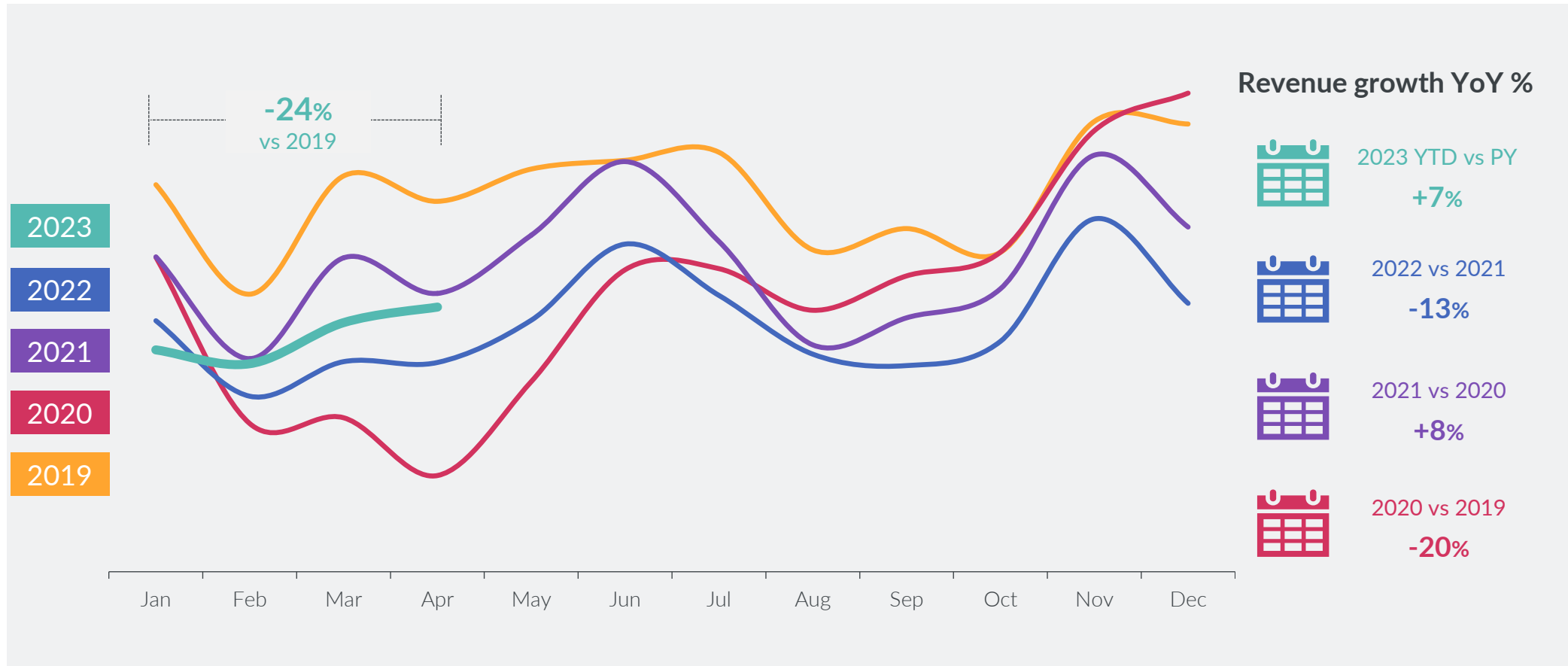
Russia

Japan

Brazil

China

Global 50 | Sales Value USD; growth rate % YoY | 2019 – YTD 2023



# 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

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Great Britain

France

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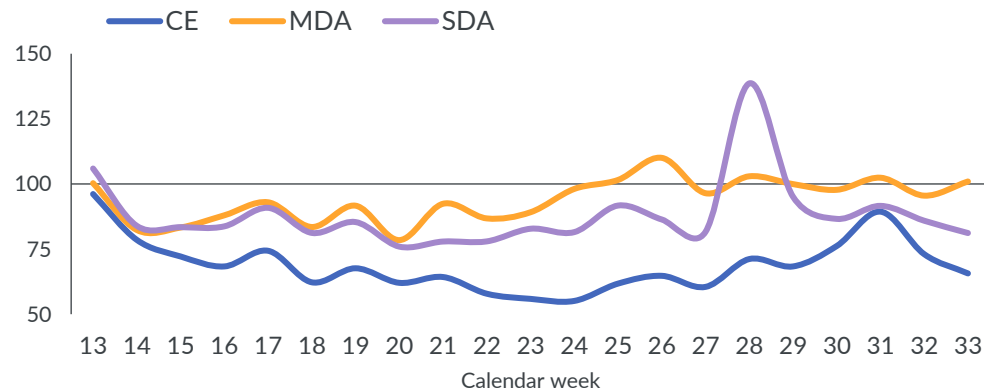
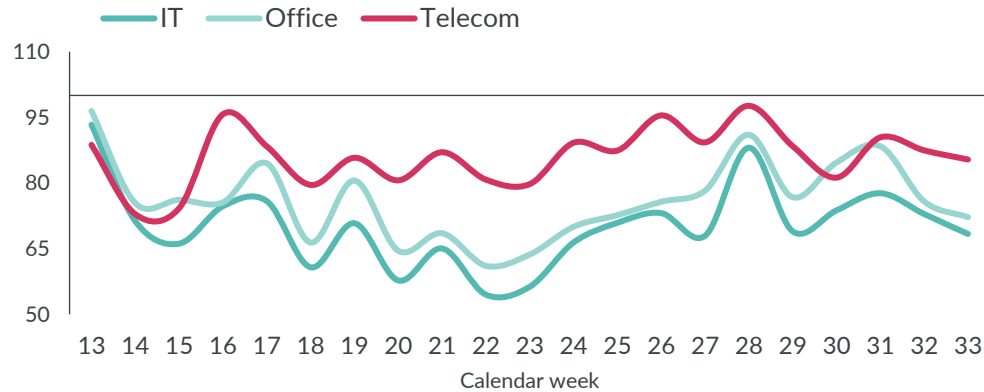
Russia

Japan

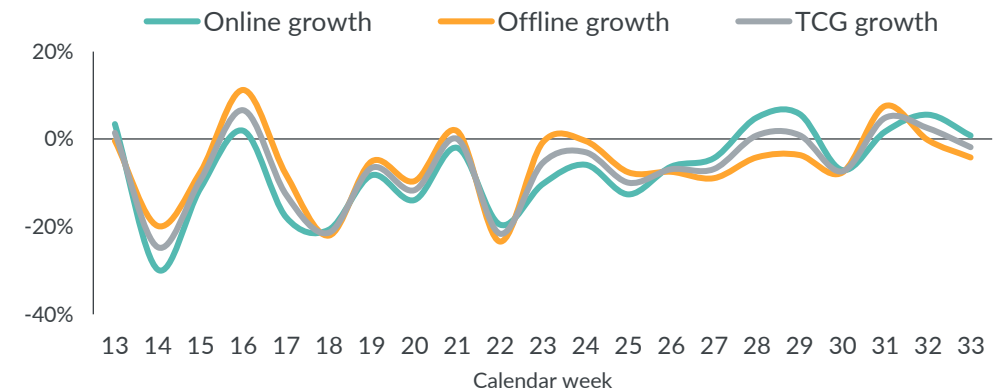
Brazil

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 33 (Aug 14 – Aug 20)



- Traditional retail delivered -4% (flat the previous week). At a weak +1%, online sales could not compensate for the losses, resulting in a score of -2% for the total TCG market.
- Except for monitors at +7%, all other IT/Office products posted double-digit negative trends between -19% and -26%. Smartphones increased by 7% in week 33.
- Air treatment recovered from -49% in week 32 to +6% in week 33. All other MDA/SDA ranged between +15% for washing machines to -18% for cooling. TV sales dropped by 3%. Soundbars were down 14%.

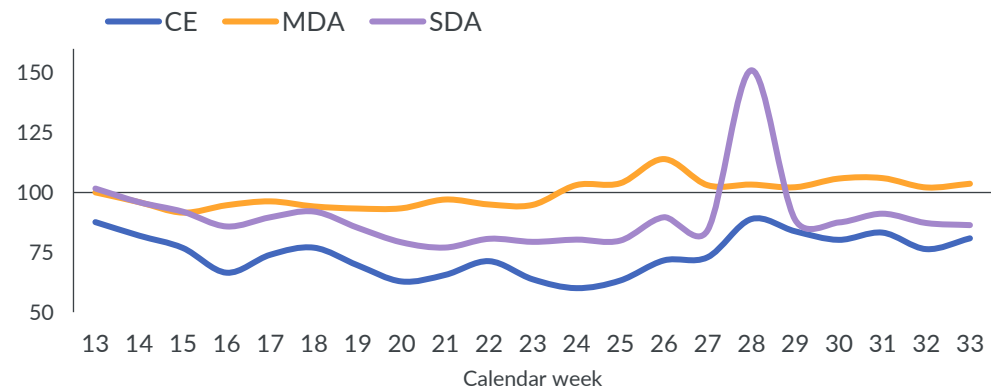
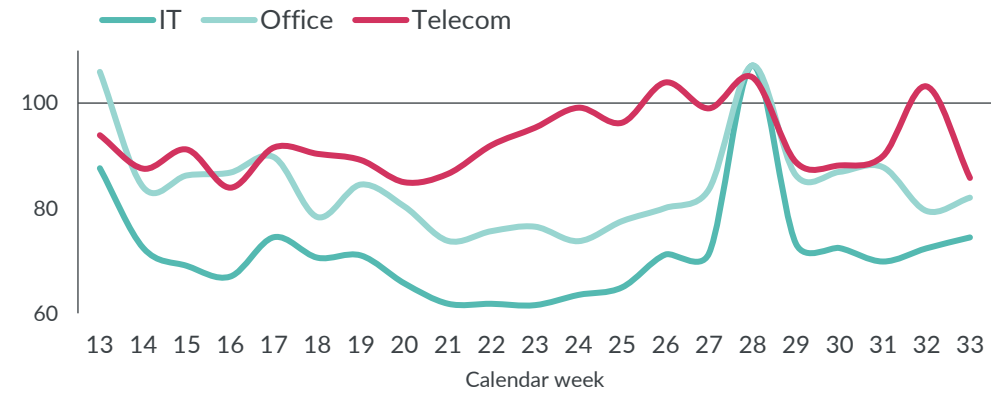
# Weekly retail insights from the Point of Sale

## Spotlight on Great Britain

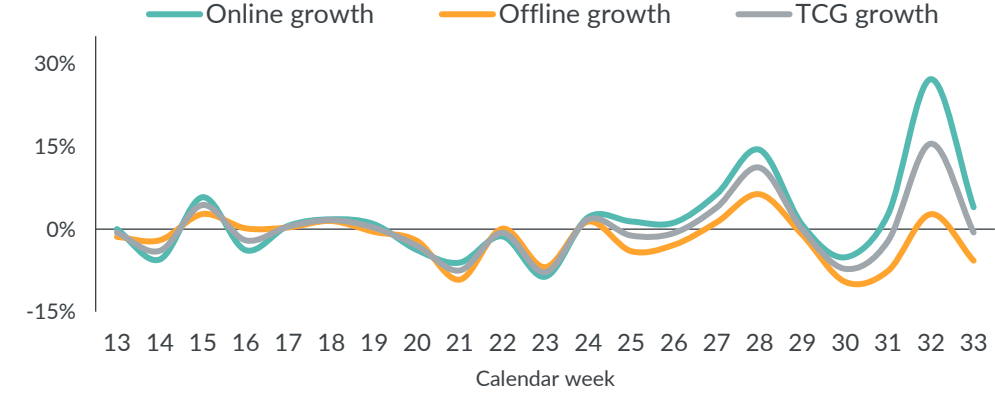


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Index: 2022 average weekly turnover in EUR = 100



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



### Key take aways in calendar week 33 (Aug 14 – Aug 20)



- Online sales at +4% were much weaker than in the previous week (+27%). Combined with decelerating traditional retail (-6%) this led to a slightly negative score (-1%) for the total TCG market.
- The main driver of this development was smartphones, up +2% compared to +30% in week 32. A strong decline for media tablets (-27%) added to it, as did desk computing (-21%) and mobile computing (-7%).
- MDA/SDA/CE categories delivered a mixed picture, ranging from +14% for dental care to -24% for audio home systems. TV sales accelerated at +8%. Vacuum cleaners were flat, as were soundbars.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 33 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): Vacuum cleaners, shavers, food preparation, dental care, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

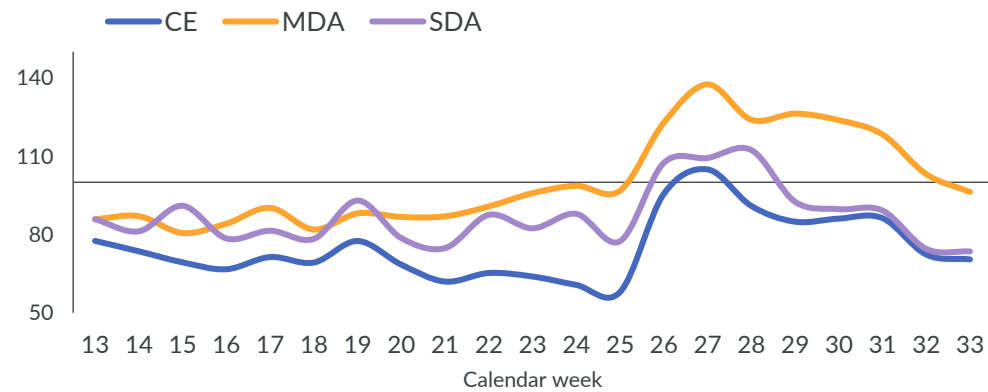
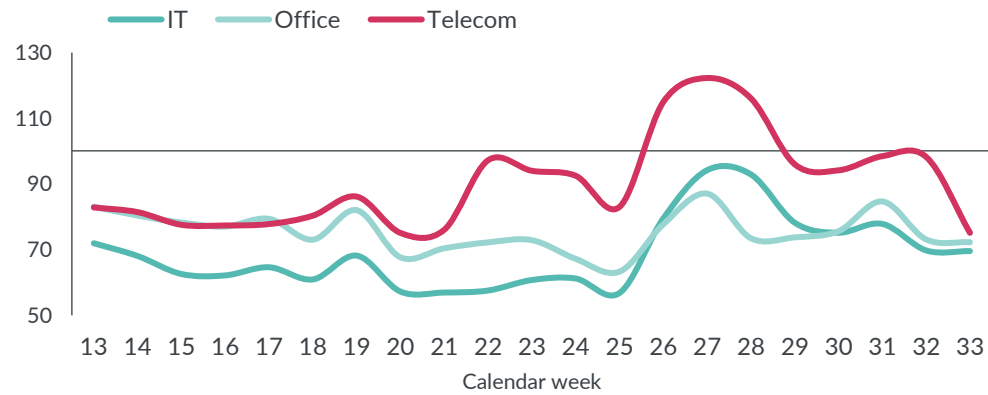
# Weekly retail insights from the Point of Sale

## Spotlight on France

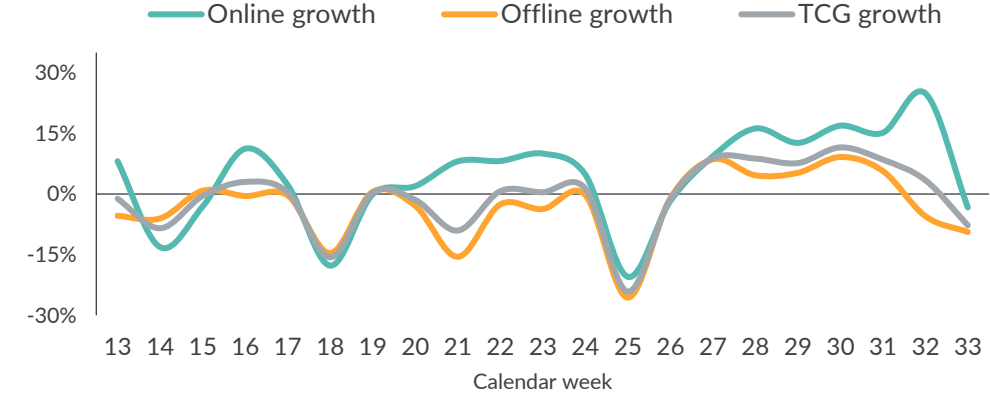


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Index: 2022 average weekly turnover in EUR = 100



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



### Key take aways in calendar week 33 (Aug 14 – Aug 20)

- Decreasing traditional retail (-9%) combined with weak online sales at -3% (down from +25% in week 32), left the total TCG market at a minus of 8%.
- All IT/Office products delivered negative trends, led by desk computing at -27% and mobile computing at -25%. Keyboards at -2% were hit the least. Smartphones lost 4% and headsets were down 1%.
- Air treatment (+153%) skyrocketed, while all other MDA/SDA/CE products experienced negative trends, except for washing machines (+3%), dental care (+1%), and soundbars (+2%). TV sales decreased by 5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 33 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

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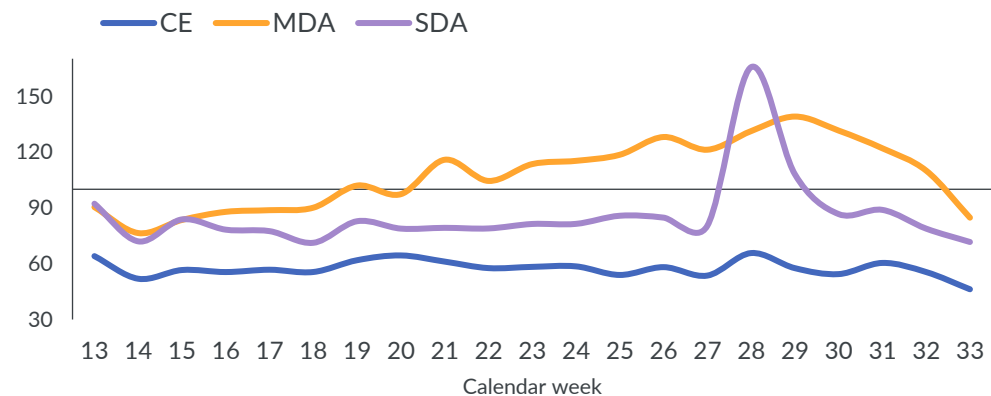
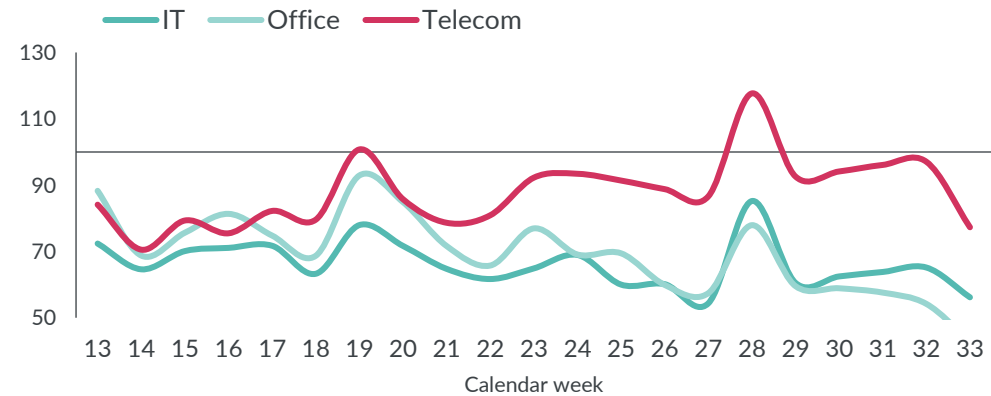
Russia

Japan

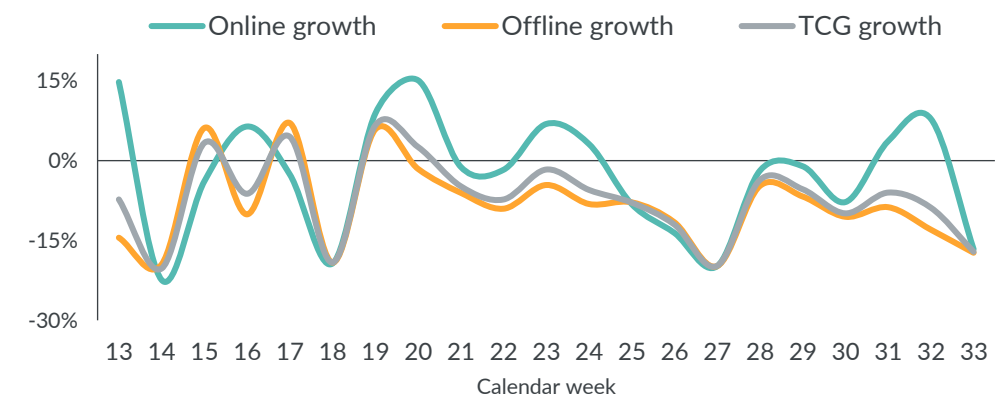
Brazil

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 33 (Aug 14 – Aug 20)



- At an identical rate of -17%, both traditional retail and online sales dragged the total TCG market down by -17%.
- Except for media tablets at -18%, all other IT/Office products decreased by more than 30%, led by laser printers at -45%. Smartphones decelerated at -6%.
- There were losses of more than 30% for CE products. Except for air treatment (+45%), all other MDA/SDA categories posted negative trends. Hot beverage makers and washing machines at -6% were hit least.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 33 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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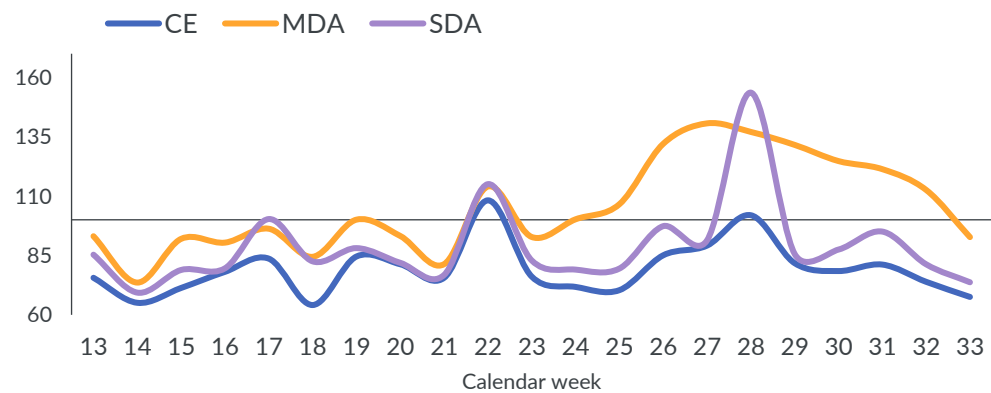
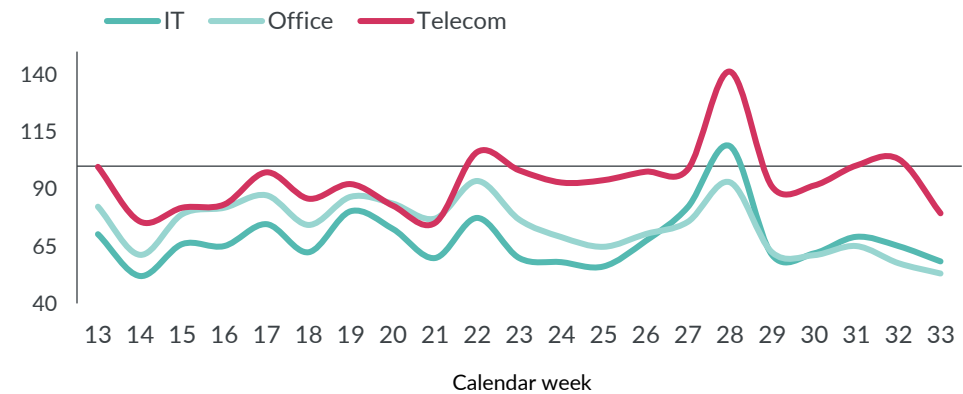
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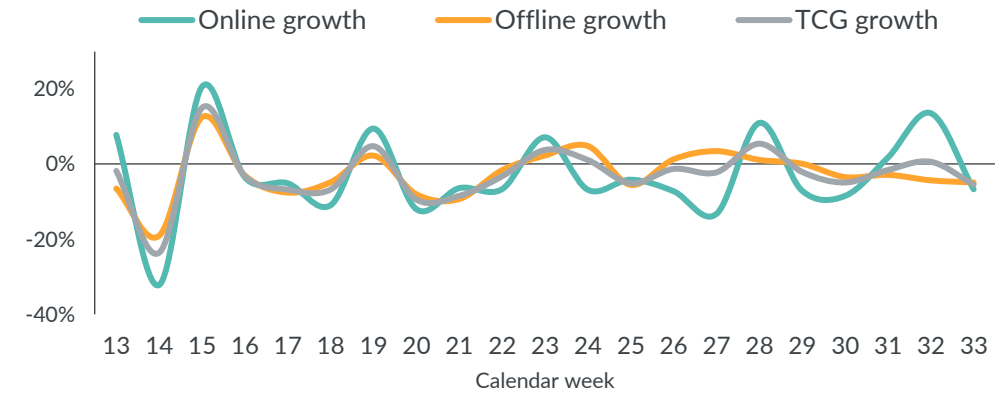
Brazil

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 33 (Aug 14 – Aug 20)



- Traditional retail experienced a minus of 5% versus week 33 in 2022. Online sales at -7% added to it, resulting in a downswing for the total TCG market of 5%.
- Desk computing at -29% was the worst-performing product group in week 33, while media tablets were the only category with a positive trend (+2%). Smartphones accelerated at +6%.
- While TV sales (-13%) and audio home systems (-19%) were hit strongly, soundbars were less negative (-6%). Hot beverage makers posted +7% and shavers increased by 2%. Washing machines were flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 33 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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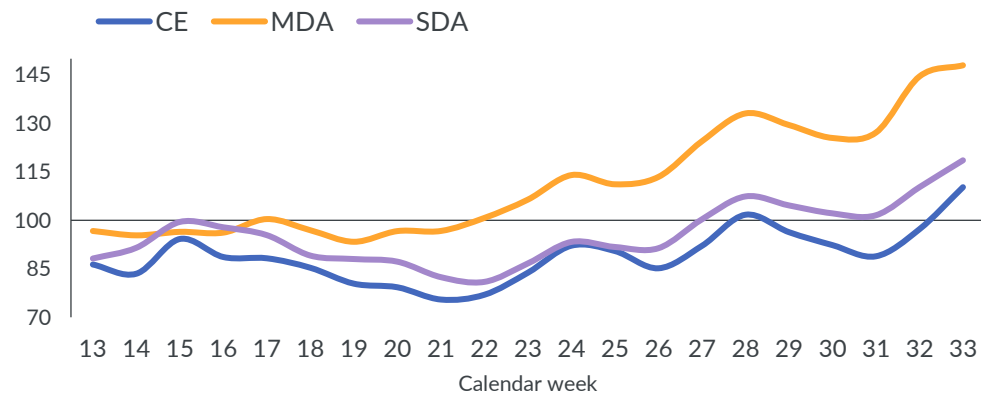
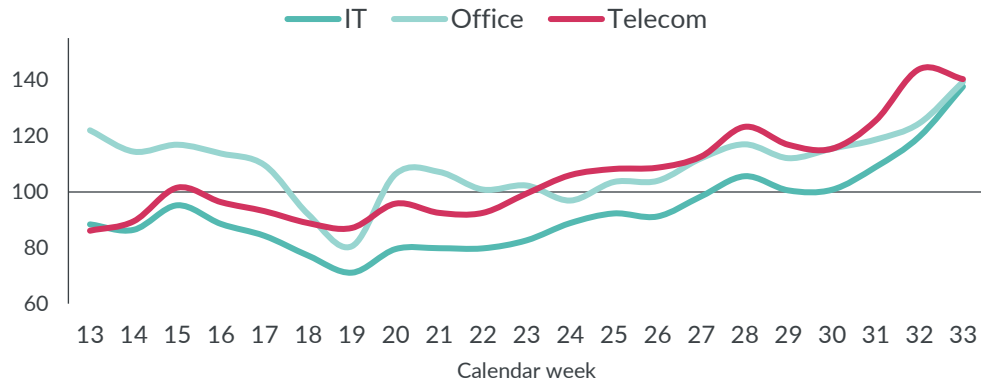
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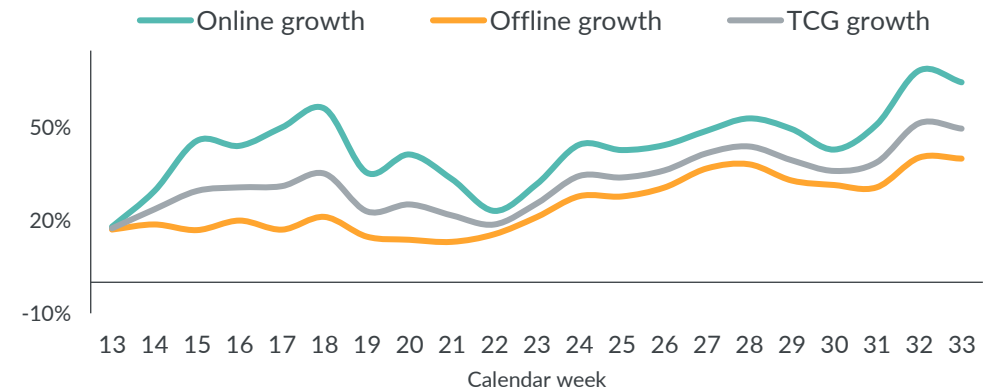
Brazil

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 33 (Aug 14 - Aug 20)



- The Russian TCG market continued its recovery, delivering +50% versus week 33 in 2022. Online sales at +65% 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 (+67%) and smartphones (+64%) out in front. Monitors were the weakest category at +12%.
- There was also a very strong acceleration for MDA/SDA/CE products. Shavers at +24%, dental care at +21%, and food preparation at +8% were slightly weaker. TV sales were up 46%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 33 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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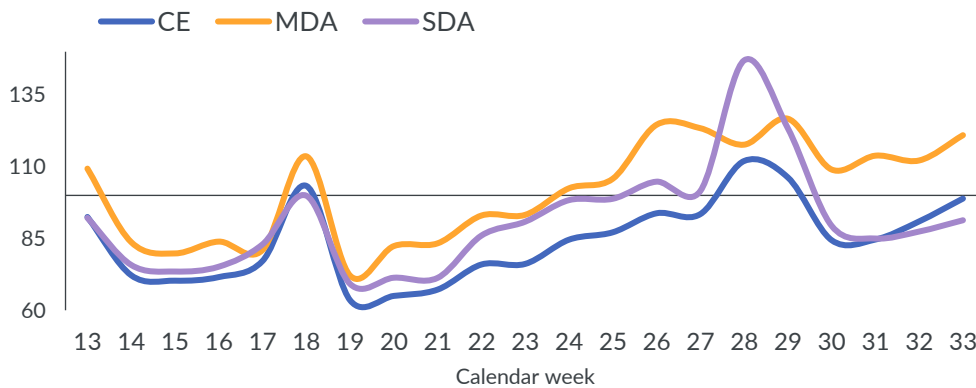
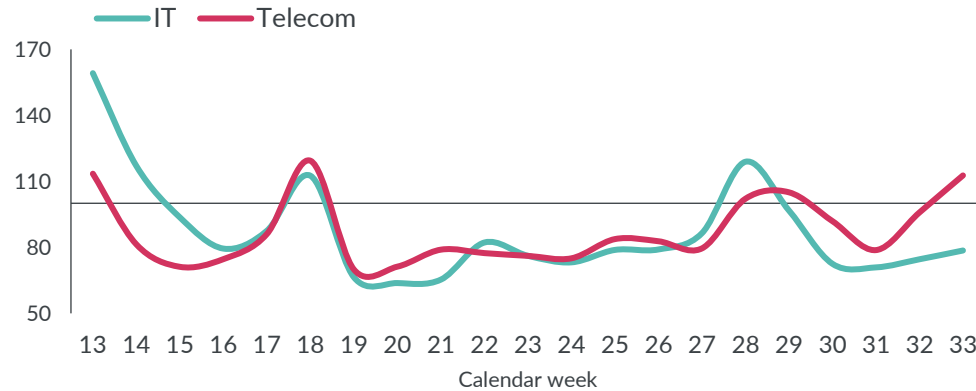
Russia

➤ Japan

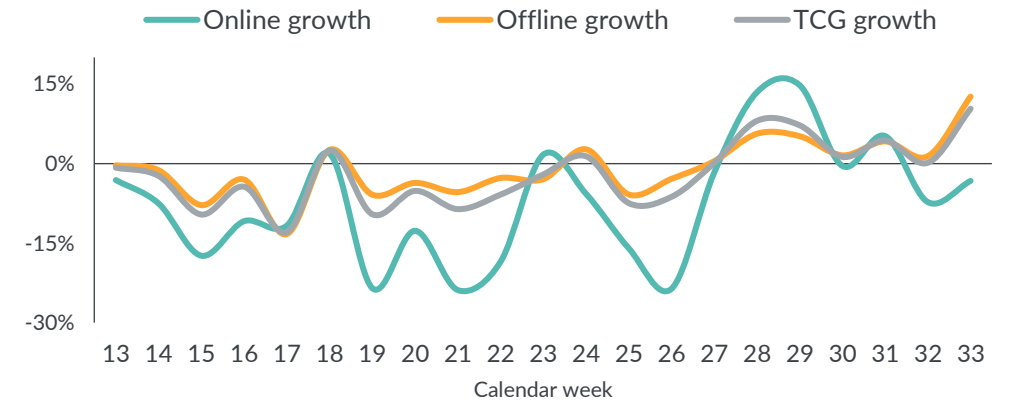
Brazil

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 33 (Aug 14 – Aug 20)



- A good recovery for traditional retail (+13% in week 33 versus +1% in week 32) lifted the total TCG market to a solid plus of 10%. Deceleration of online sales (-3%) did not impact this result.
- Smartphones delivered a remarkable rate of +51% versus week 33 in 2022. Headsets posted +12%. Mobile computing declined by 11% while media tablets experienced an uptick of +4%.
- While audio home systems dropped by 22%, soundbars and TVs were flat. Overall positive trends for MDA/SDA products were just clouded by air treatment at -19% and food preparation at -5%.

# Weekly retail insights from the Point of Sale

## Spotlight on Brazil



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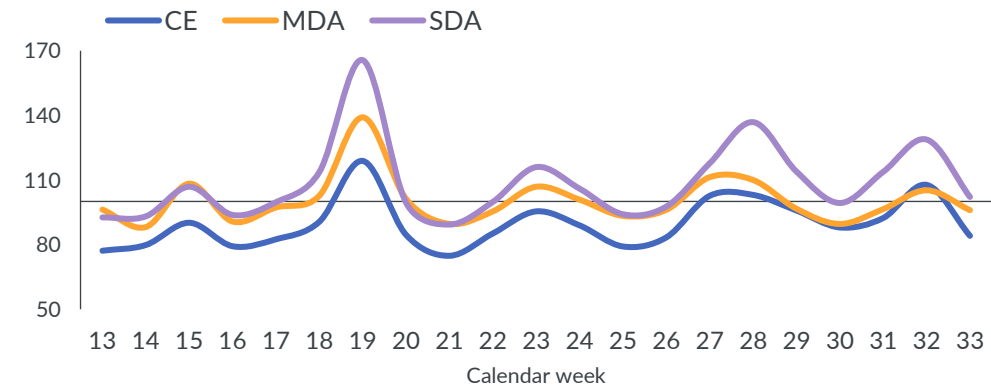
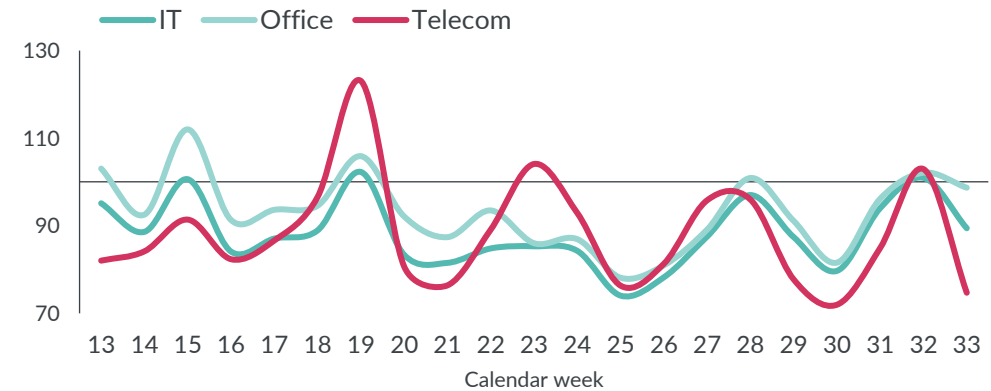
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Japan

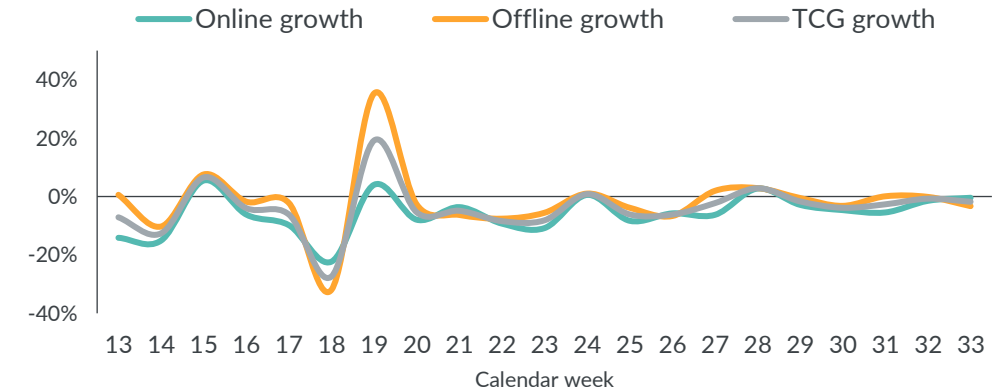
➤ Brazil

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 33 (Aug 14 – Aug 20)



- Traditional retail delivered -3%, but flat online sales failed to convert the total TCG market to positive growth, leaving it at -2%.
- Media tablets at +34% were the best-performing category in week 33. Except for laser printers at +5%, all other IT/Office categories posted negative trends, with mobile computing delivering -14%. Smartphones lagged at -7%.
- The overall positive picture for MDA and SDA product groups was determined by double-digit growth for most categories apart from +6% for food preparation. TV sales experienced -7% in week 33.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 33 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



About **gfknewron**

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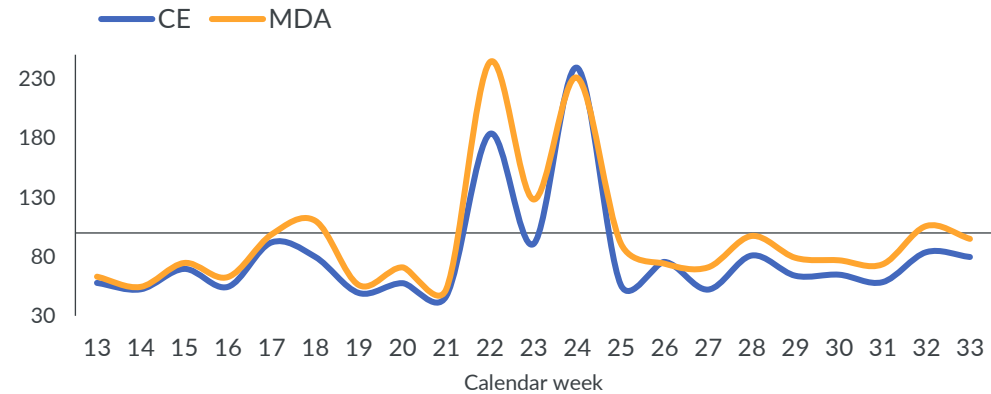
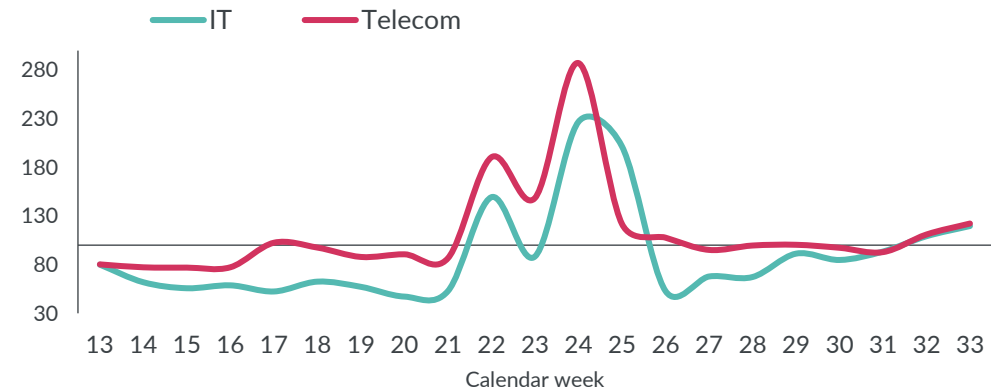
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Japan

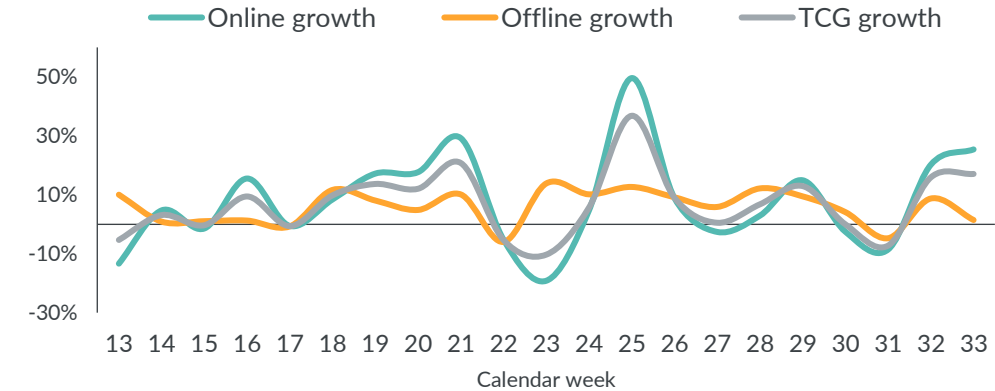
Brazil

> 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 33 (Aug 14 - Aug 20)



- A good result for online sales (+25% in week 33) lifted the total TCG market to a solid plus of 17%. Traditional retail was weak at just +1%.
- Smartphones were the driving force, accelerating at +34%. Mobile computing delivered a minus of 3%.
- Week 33 in 2023 saw decreases for washing machines (-9%) and cooling (-3%). TVs were the worst-performing product group at -15%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 33 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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