



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 172
cw36/2023

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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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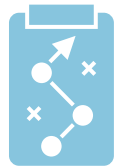
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Fact of the Week

The IT market gained momentum through the pandemic and stays at higher level than pre-pandemic 2019 in both revenue and volume terms.



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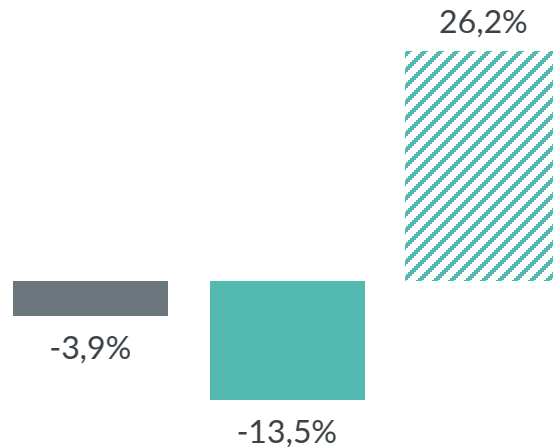
China



IT: Hardware, Peripherals, Storage

Sales revenue USD | Growth YoY % | Jan - Jun

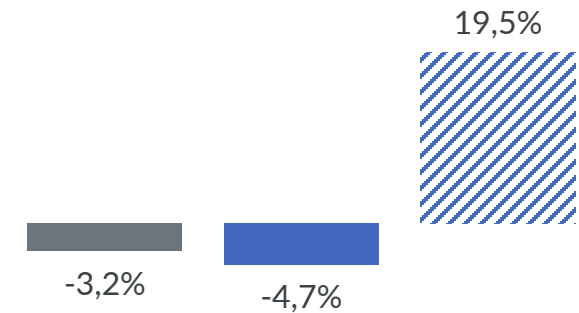
■ 2022 vs 2021 ■ 2023 vs 2022 🌀 2023 vs 2019



IT: Hardware, Peripherals, Storage

Sales volume | Growth YoY % | Jan - Jun

■ 2022 vs 2021 ■ 2023 vs 2022 🌀 2023 vs 2019



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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Fact of the week

➤ Germany

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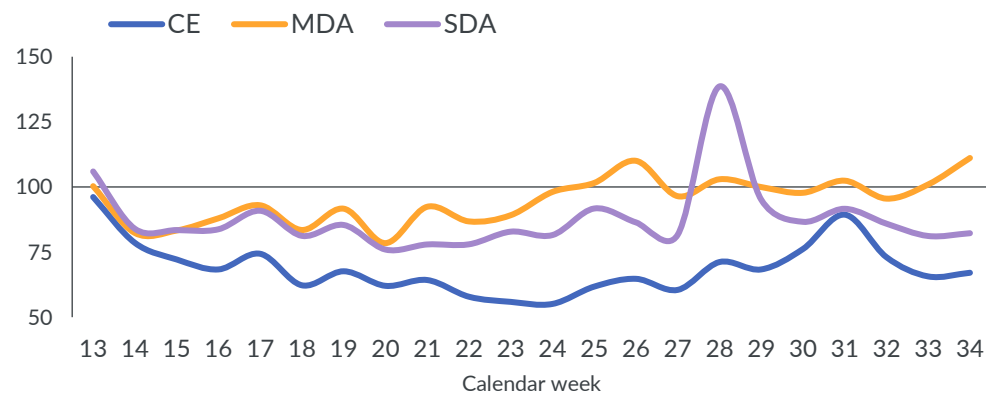
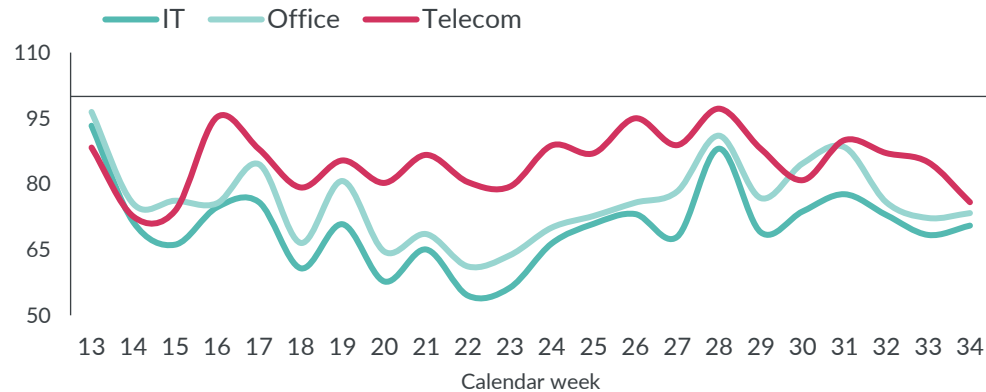
Russia

Japan

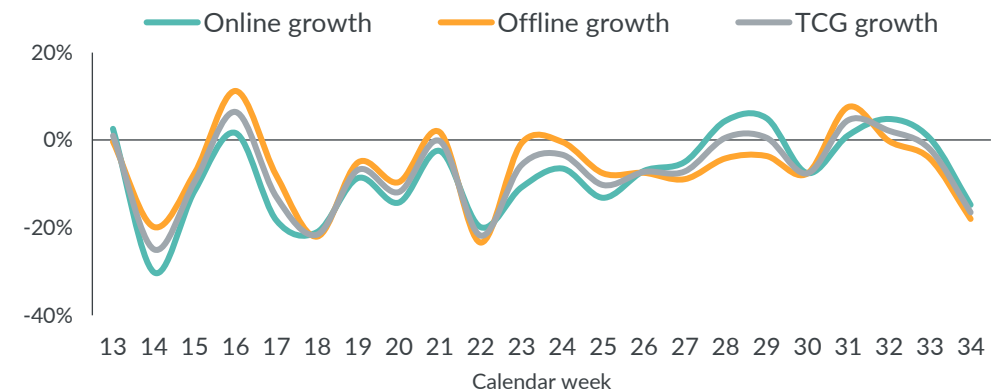
Brazil

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 34 (Aug 21 – Aug 27)

- Strong drops for both traditional retail (-18%) and online sales (-15%) led to a considerable downswing of 17% for the total TCG market.
- Except for monitors at +2%, all other IT/Office products posted double-digit negative trends of between -19% for laser printers and -24% for mobile computing. Smartphones decreased by 24% as well.
- Air treatment delivered a remarkable upswing of 121% versus week 34 in 2022. There was a mixed picture across the other MDA/SDA categories, ranging from +22% for washing machines to -38% for food preparation. CE products posted negative trends throughout, with TVs down 2%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 34 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.

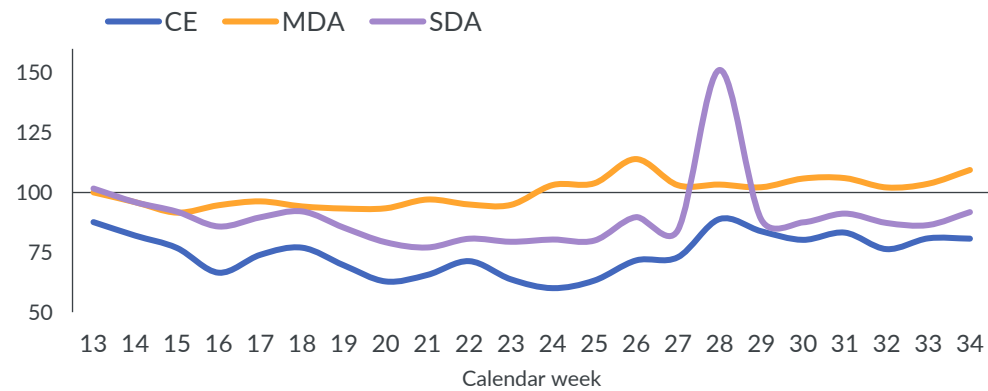
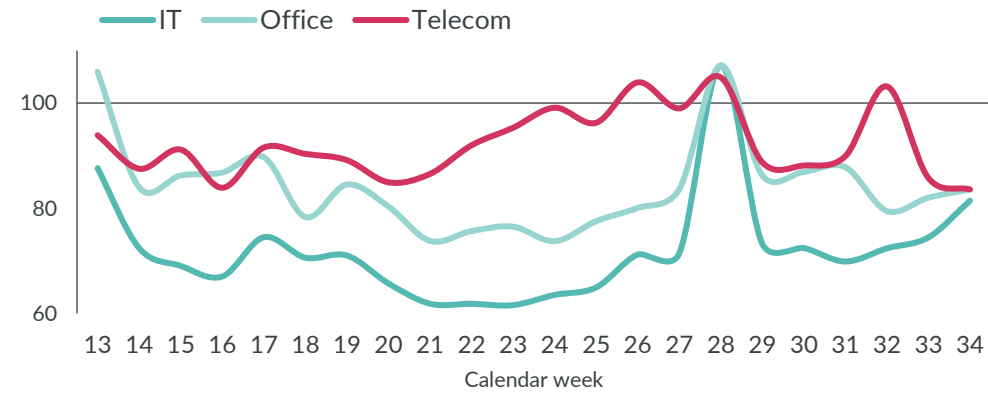
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

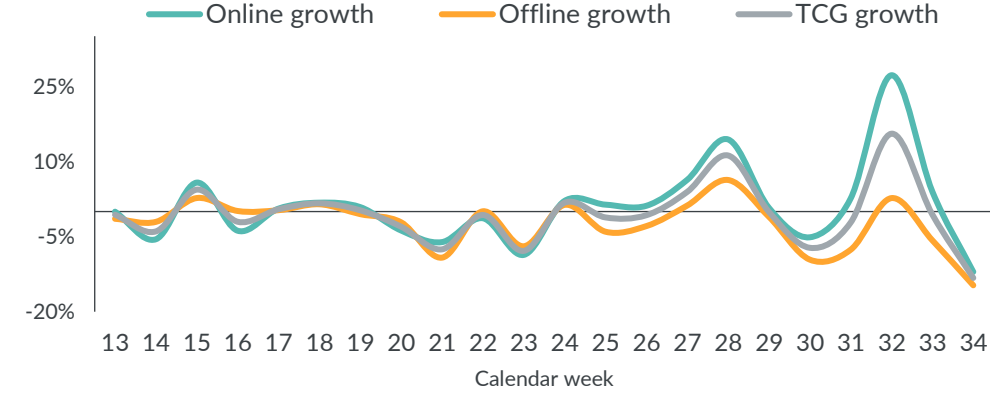


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 34 (Aug 21 - Aug 27)



- The deceleration of traditional retail (-15%) dragged the total TCG market down by -13%. Online sales added to it by delivering -12%.
- Except for keyboards and mice, up 8% and 9% respectively, all other IT/Office products delivered double-digit negative trends, led by laser printers at -41%. Smartphones slumped at -20%.
- CE products declined throughout with audio home systems in the lead at -22%. Food preparation was the worst-performing product group within MDA/SDA categories, posting -12%. Hot beverage makers were flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 34 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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Fact of the week

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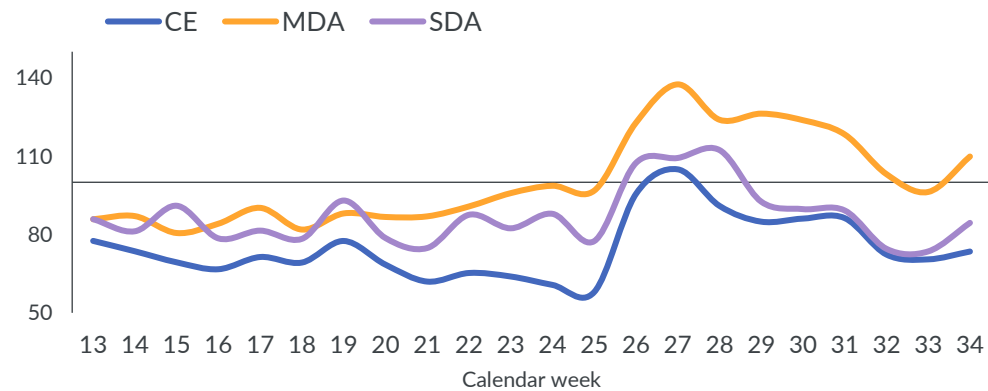
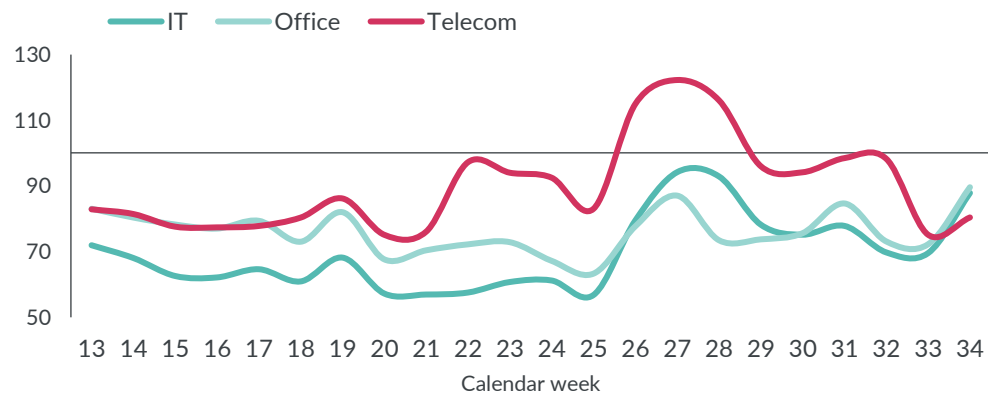
Russia

Japan

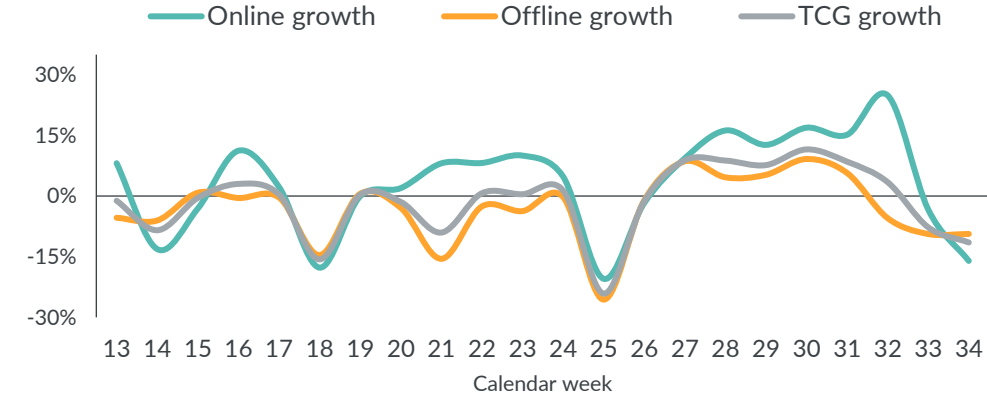
Brazil

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 34 (Aug 21 - Aug 27)



- Online sales delivered -16% (-3% the previous week) and with traditional retail down -9% (same as the previous week), the result was a downswing for the total TCG market of 12%.
- IT/Office products posted negative results throughout, ranging from -13% for keyboards to -41% for laser printers. Mice was the only category with a single-digit negative rate of -1%. Smartphones decelerated at -20%.
- Air treatment (+410%) posted extraordinary growth, while all other MDA/SDA/CE products experienced negative trends, with washing machines and cooling hit the least at -1%. TV sales decreased by 5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 34 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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Germany

Great Britain

France



Italy

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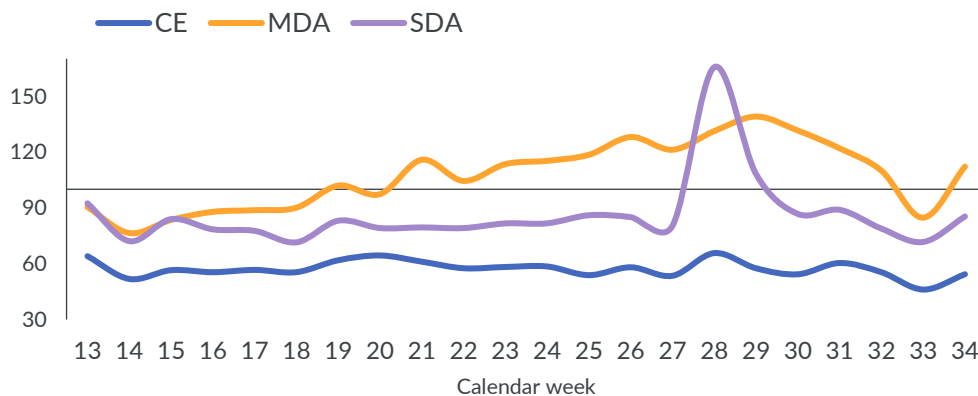
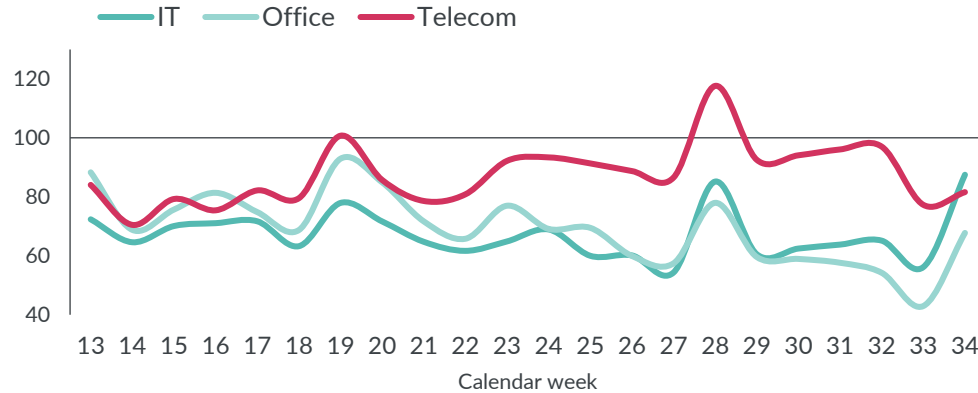
Russia

Japan

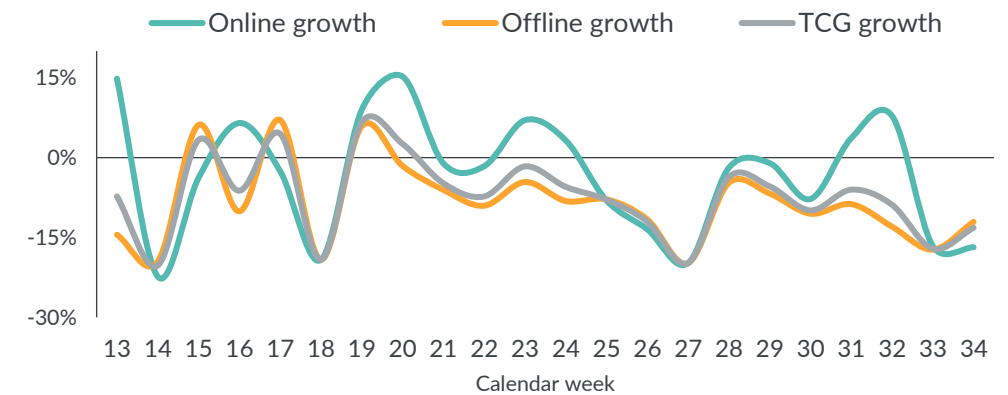
Brazil

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 34 (Aug 21 - Aug 27)



- Both online sales (-17%) and traditional retail (-12%) experienced a clear minus, resulting in a loss for the total TCG of 13%.
- Except for media tablets at -9%, all other IT/Office products decreased by double digits, led by mobile computing and desk computing at -28%. Smartphones lagged at -11%.
- Air treatment was the outstanding category in week 34, at +261%. While MDA categories grew in single digits, all CE and other SDA categories posted negative results. This trend was led by audio home systems and TV sales at -36% and -34% respectively. Vacuum cleaners were flat.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 34 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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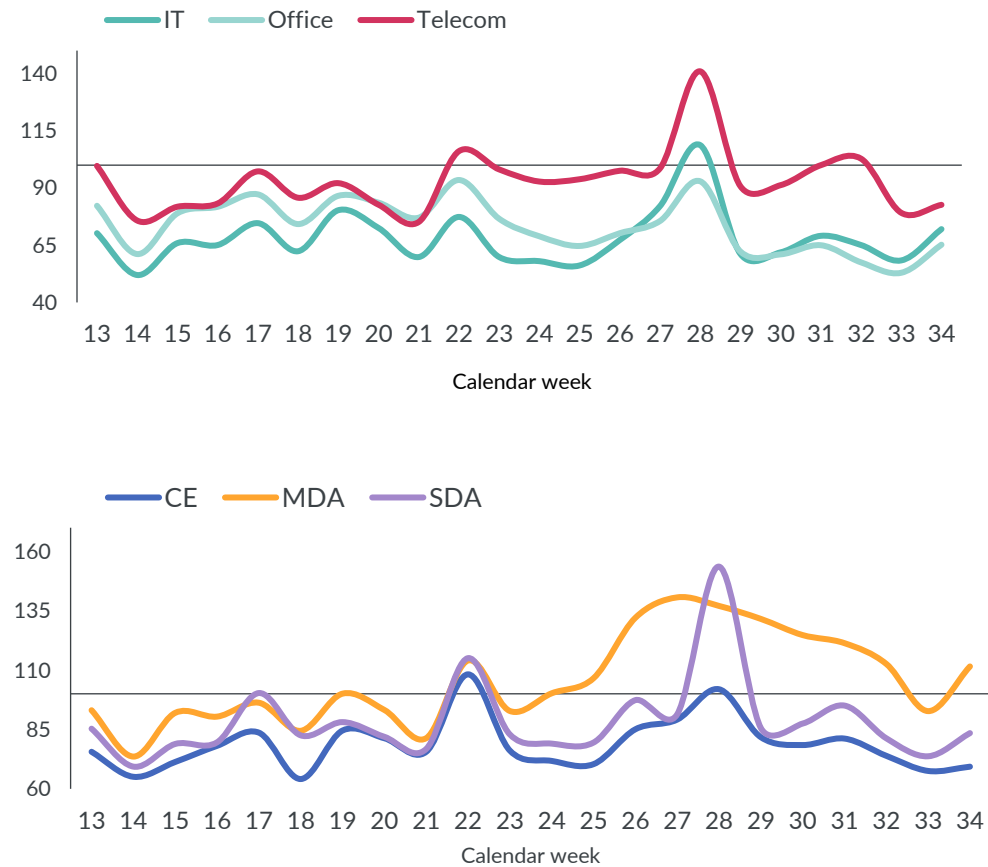
Russia

Japan

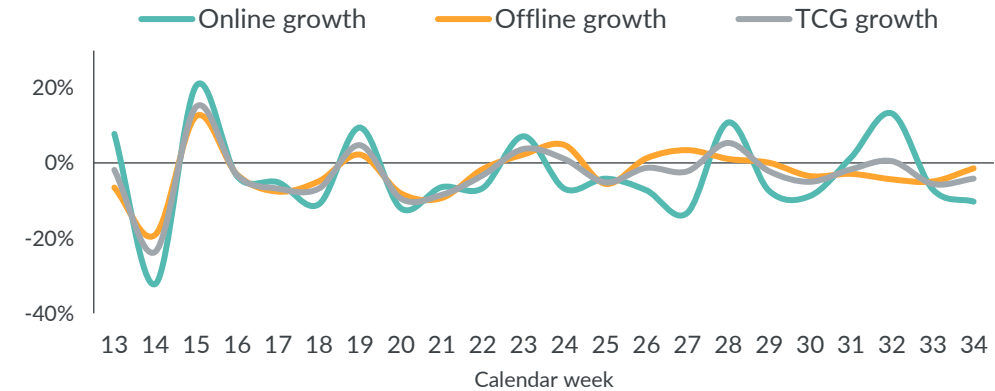
Brazil

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 34 (Aug 21 - Aug 27)



- Traditional retail experienced a minus of 1% versus week 34 in 2022 but it was online sales at -10% that dragged the total TCG market down by 4%.
- Desk computing was the worst-performing product group in week 34, at -29%. Media tablets and laser printers were flat. Smartphones decelerated at -5%.
- CE products were hit strongly, all delivering double-digit negative rates, with audio home systems in the lead at -22%. All MDA/SDA categories registered positive results, with vacuum cleaners out in front at +20%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 34 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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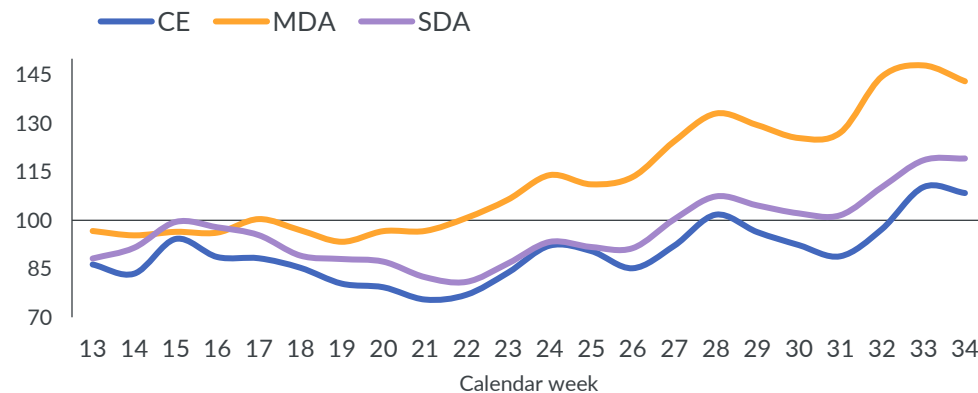
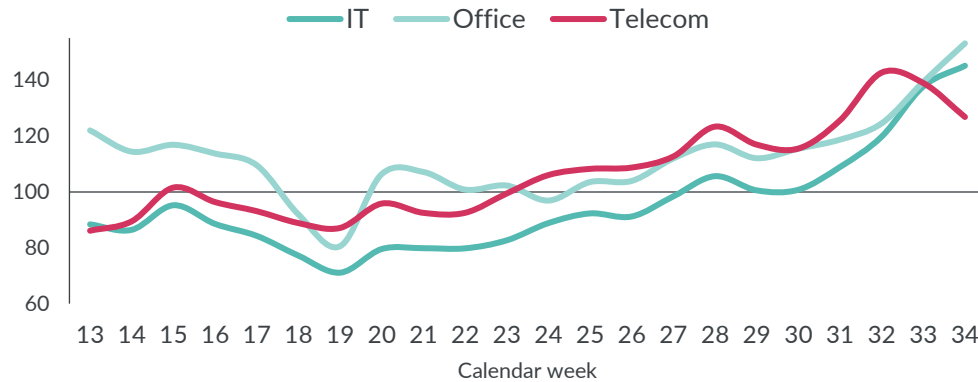
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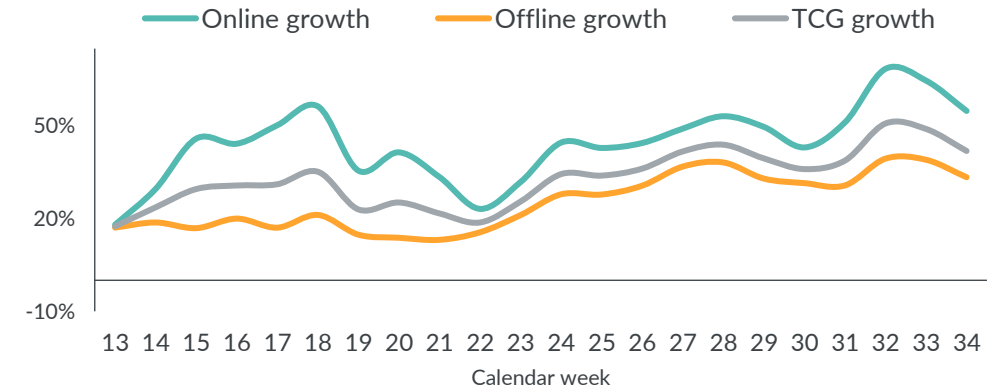
Brazil

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 34 (Aug 21 - Aug 27)



- The Russian TCG market continued its recovery, delivering +42% versus week 34 in 2022. Online sales at +55% were the driving force. Traditional retail added to it at +33%.
- Media tablets (+69%), inkjet printers (+61%), and laser printers (+51%) were the best-performing categories among IT/Office product groups. Smartphones accelerated at +48%.
- Growth rates for MDA/SDA/CE products were a bit smaller, with dental care being the weakest category at +10%. TV sales were up 35%.

Weekly retail insights from the Point of Sale

Spotlight on Japan



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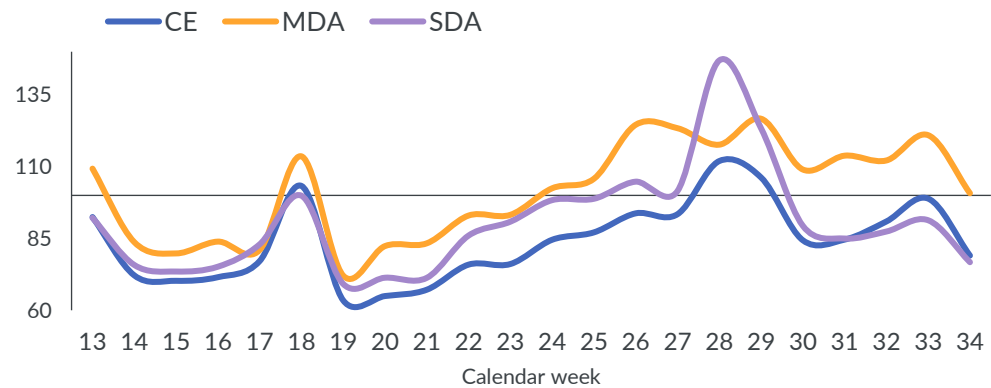
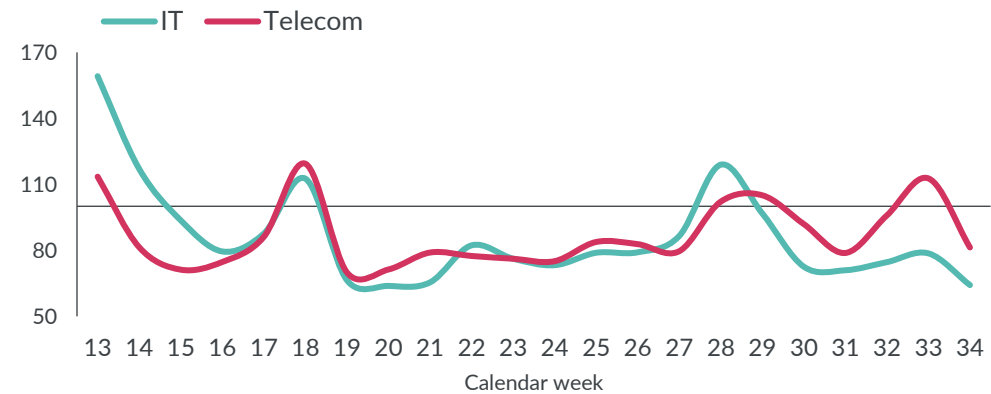
Russia

➤ Japan

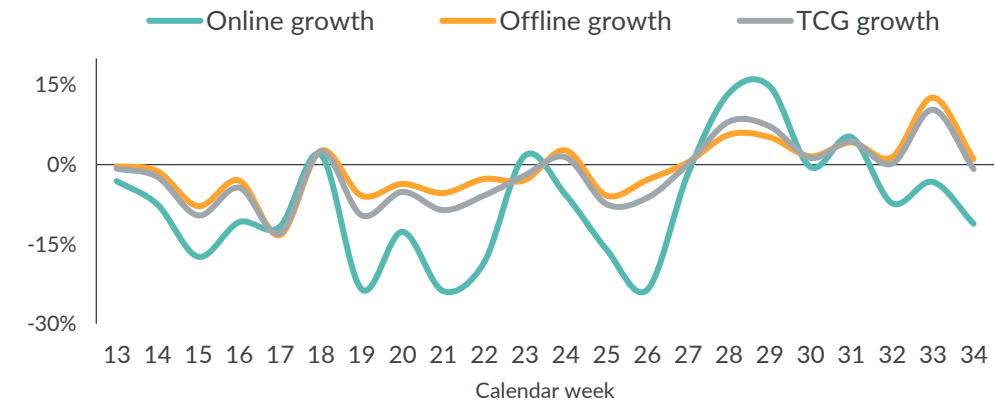
Brazil

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 34 (Aug 21 – Aug 27)



- While a slight plus of 1% remained in traditional retail (versus +13% in week 33), online sales at -11% dragged the total TCG market down by 1%.
- Mobile computing and media tablets both decelerated at -19% and -17% respectively. While smartphones delivered +17%, headsets were weaker, posting +6%.
- Mixed trends for MDA/SDA/CE products saw dental care in the lead at +13%. Audio home systems at -27% and hot beverage makers at -14% marked the other end of the scale. Washing machines were flat. TV sales delivered -8%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 34 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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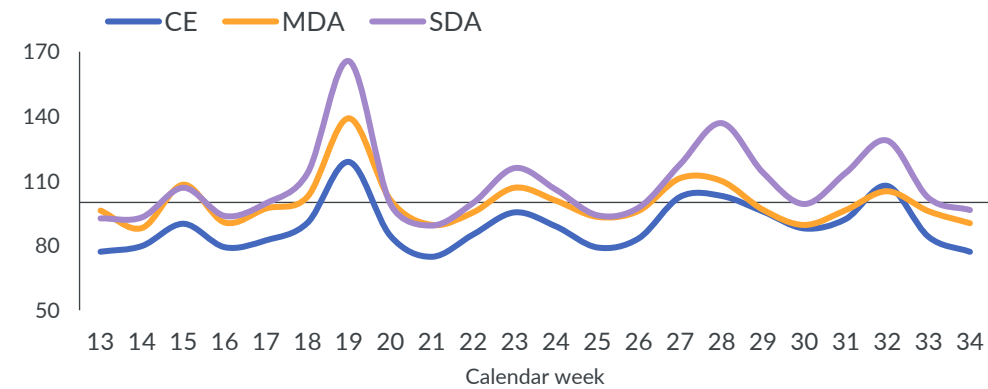
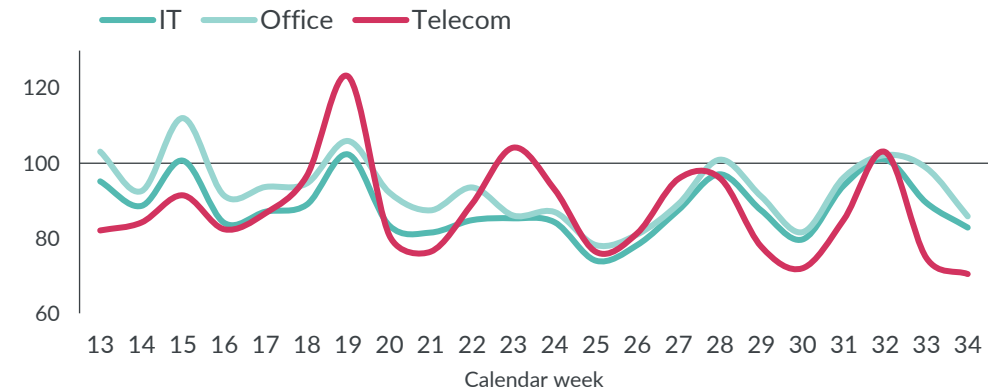
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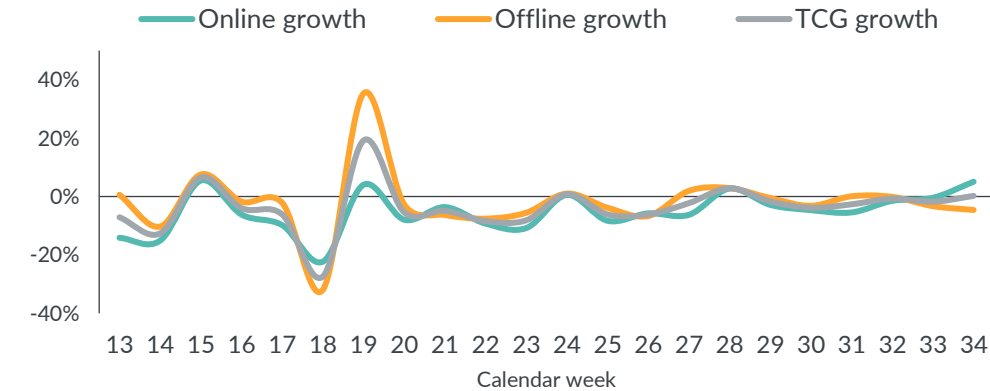
➤ Brazil

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 34 (Aug 21 - Aug 27)



- Online sales (+5%) and traditional retail (-5%) delivered an opposing development to each other, which resulted in a flat total TCG market.
- Media tablets at +40% were the best-performing category in week 34. The other IT/Office categories posted trends ranging from +10% for laser printers to -11% for mobile computing. Smartphones lagged at -4%.
- The overall positive picture for MDA and SDA product groups was determined by double-digit growth for most categories apart from +4% for washing machines. TV sales experienced -7% in week 34 and audio home systems lost 23%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 34 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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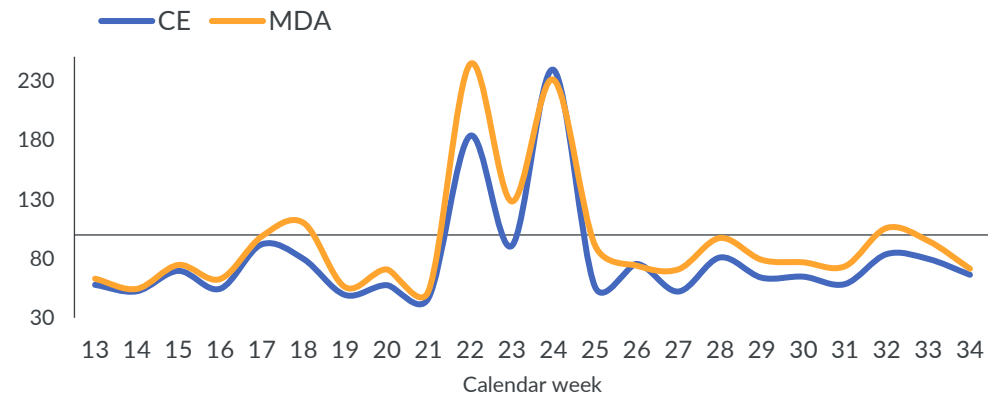
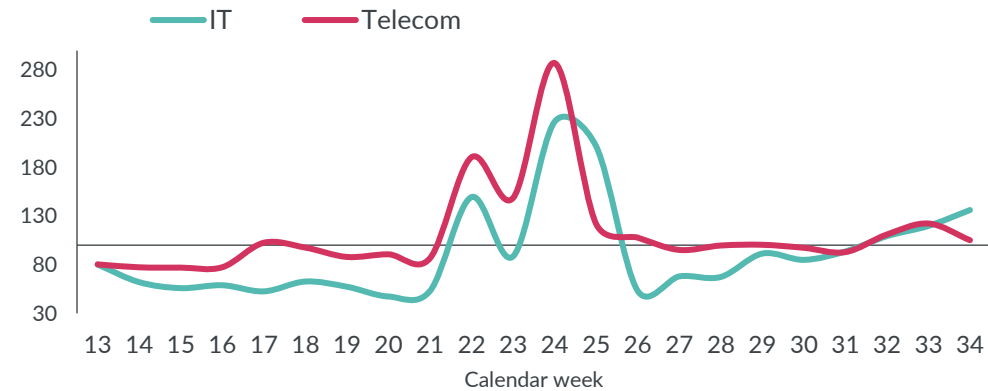
Russia

Japan

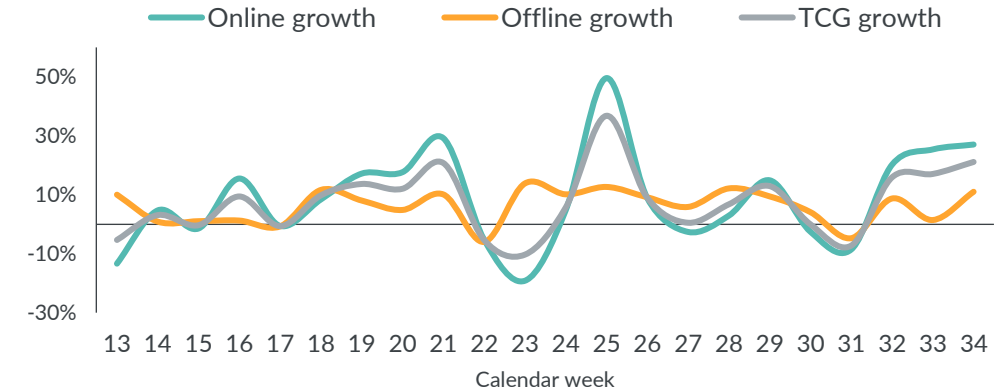
Brazil

> 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 34 (Aug 21 - Aug 27)



- Further recovery for online sales (+27% in week 34 versus +25% in week 33) and traditional retail (+11% versus +1%) lifted the total TCG market to a solid plus of 21%.
- Smartphones were the driving force of this development, accelerating at +48%. Mobile computing delivered a minus of 2%.
- Week 34 in 2023 saw decreases for washing machines (-10%) and cooling (-16%). TVs were the worst-performing product group at -21%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 34 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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