



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 173
cw37/2023

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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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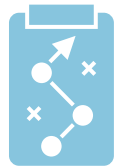
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Fact of the Week

The sustainability gap – sustainability as a driver is gaining ground, but varies per sector



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> Fact of the week

Germany

Great Britain

France

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Spain

Russia

Japan

Brazil

China

Global

Importance of energy efficiency for buying decision



51%
MDA



19%
CE



5%
SDA

Needs of the hour

- Purpose-driven brands
- Awareness among consumers
- Trusted brands

Global

TCG Q4 2022



73%
Believe

Say it is important that companies take environmentally friendly actions

but

Only
57%

of consumers perceive at least one of top brands* as being eco-friendly

While
95%

perceive at least one of top brands as high-quality products

Source: GfK Consumer Life 2022, GfK newron consumer, all countries monitored, MDA: cooker/oven/hob, dishwasher, microwave oven, refrigerators/freezers, washing machines, tumble dryers; CE: TV, AI speakers/digital cams; SDA: electric kettle, hot beverage maker, shaver/trimmer, vacuum cleaner; Q2 2018- Q3 2022

Source: 2022 gfknewron consumer Q4 2022 all countries; *top 10 brands per country per product group

© GfK

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

Great Britain

France

Italy

Spain

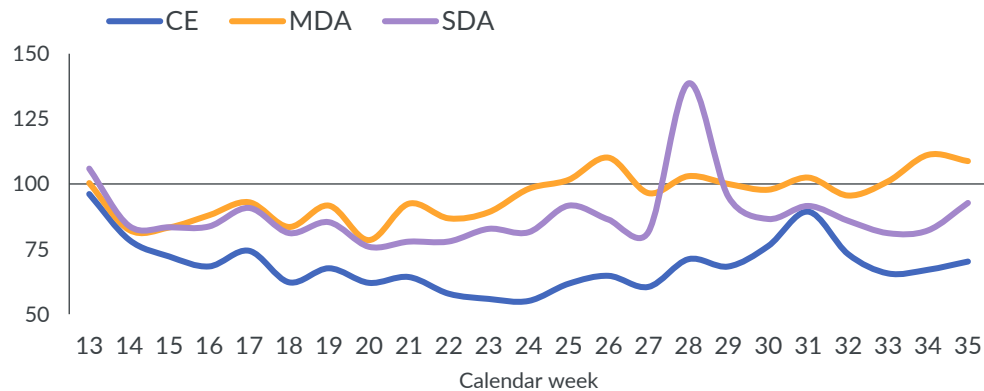
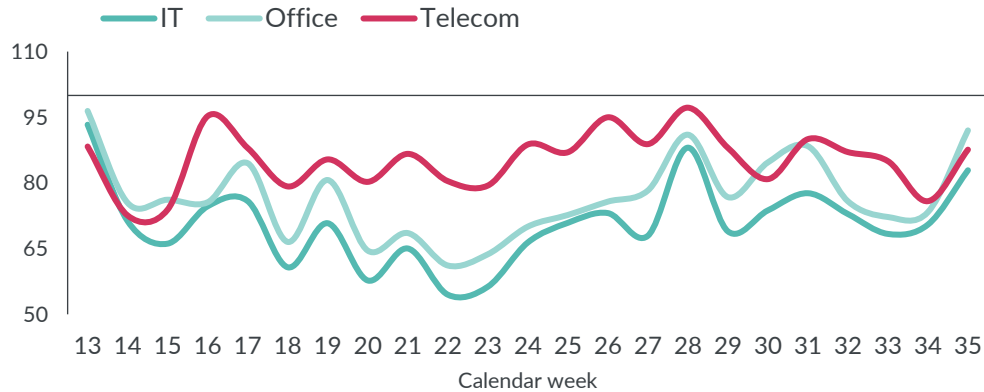
Russia

Japan

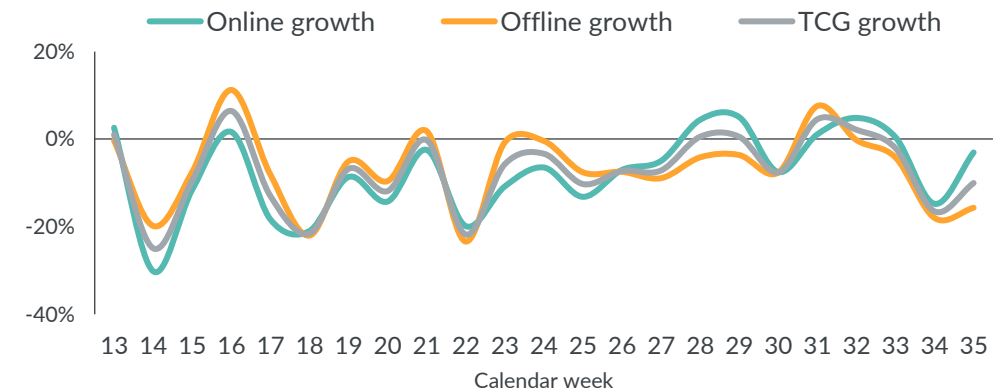
Brazil

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 35 (Aug 28 – Sep 03)



- Traditional retail at -16% dragged the total TCG market down by 10%. Online sales at -3% added to it.
- Except for monitors at +14%, most other IT/Office products posted negative double-digit trends of between -11% and -21%. Laser printers were down 9%. Smartphones slumped at -12% in week 35.
- Food preparation (-49%) was the worst-performing product group within MDA/SDA/CE products. There was a mixed picture across these categories, ranging from -13% for TV to +23% for dental care.

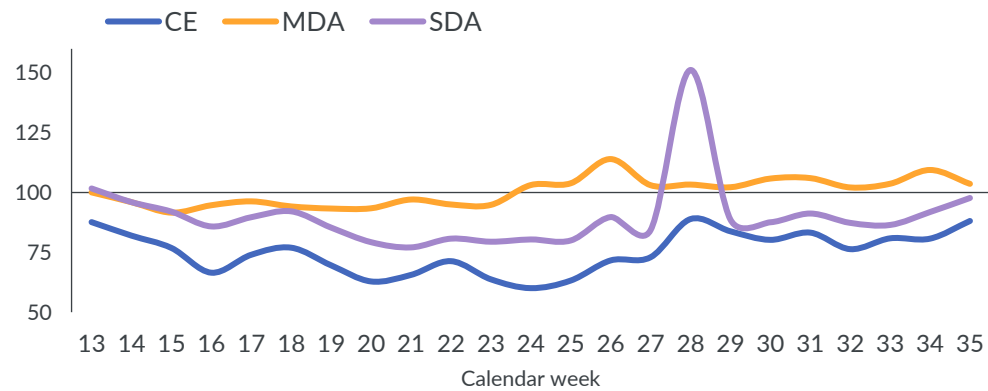
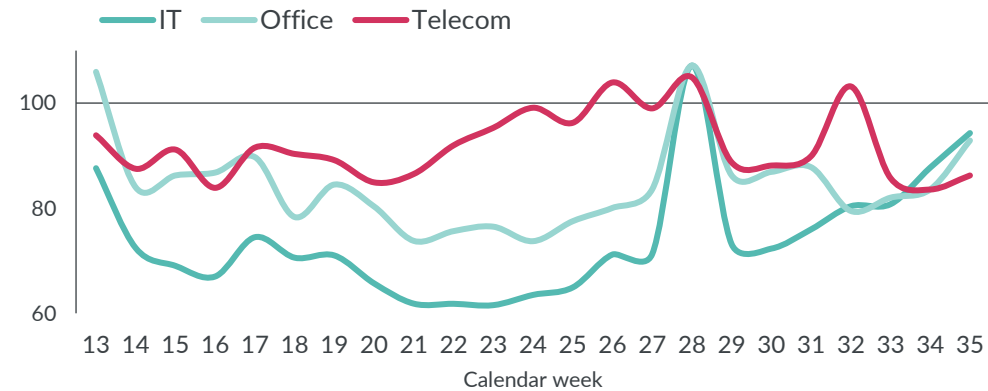
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

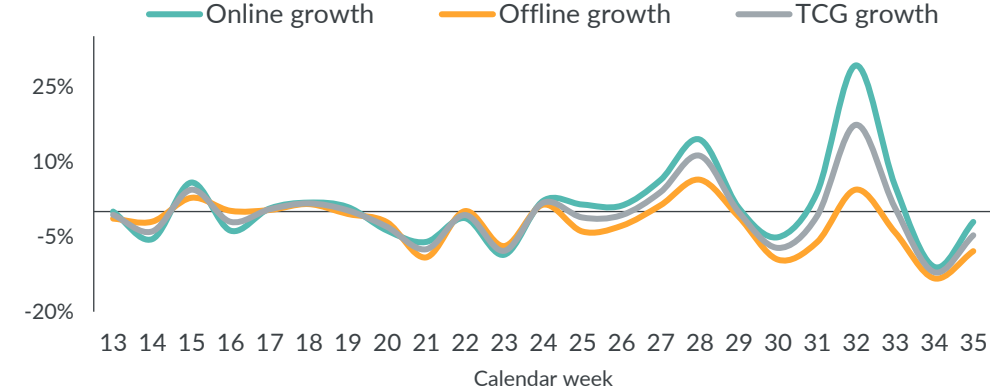


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- France
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- China

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 35 (Aug 28 – Sep 03)



- The deceleration of traditional retail (-8%) dragged the total TCG market down by -5%. Online sales added to it by delivering -2%.
- Except for keyboards, up 9%, all other IT/Office products delivered negative trends, led by media tablets at -28% and desk computing at -24%. Smartphones lagged at -5%.
- CE products declined throughout with audio home systems in the lead at -29% and TVs posting a narrow -0.7%. Except for cooling at -10%, all other MDA/SDA categories delivered slightly positive rates. Food preparation was flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 35 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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Fact of the week

Germany

Great Britain

> France

Italy

Spain

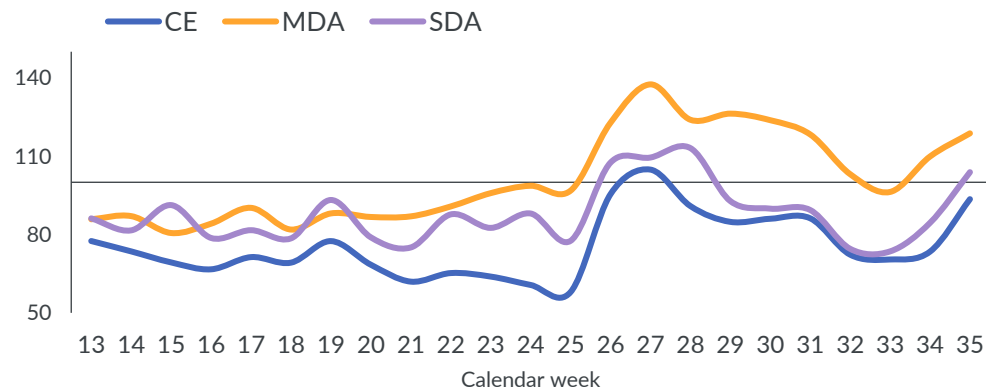
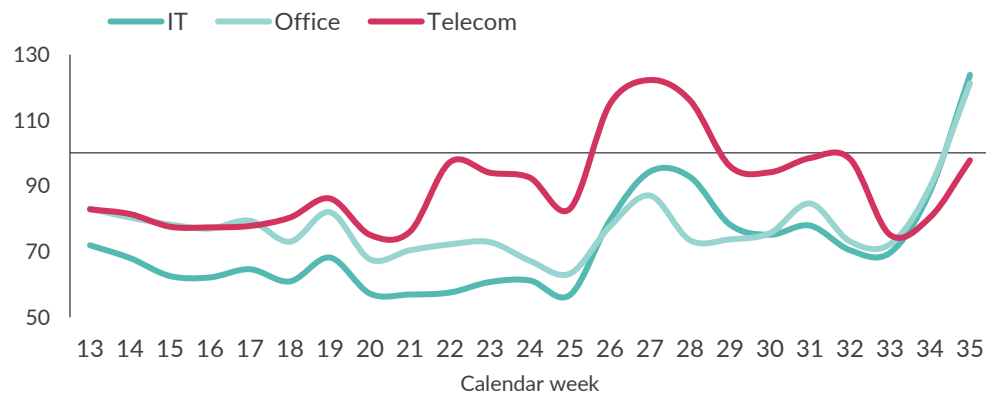
Russia

Japan

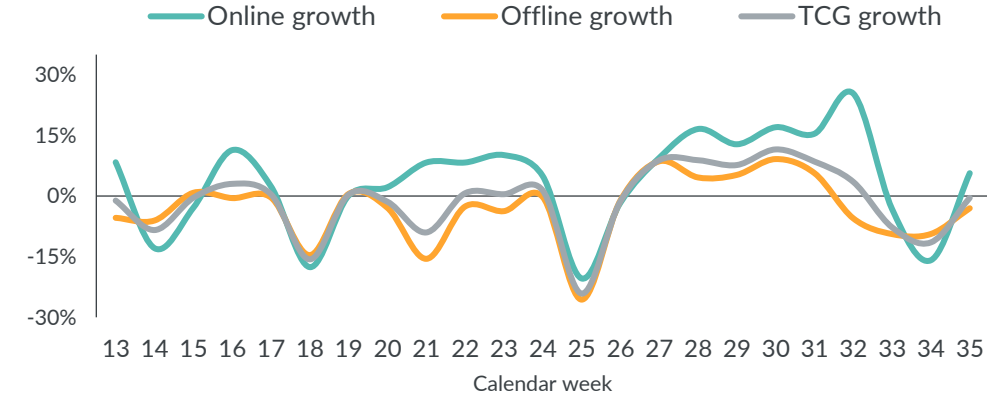
Brazil

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 35 (Aug 28 – Sep 03)



- Recovery of online sales at +6% (up from -16% in week 34) led to a flat total TCG market as it converged with traditional retail at -3% which was less negative than in week 34 (-9%).
- Most IT/Office products were double-digit negative except for keyboards at -2%. Mice and monitors grew by 3% and 4% respectively. Smartphones decreased slightly by 2%.
- Air treatment (+27%) was the best-performing product group within MDA/SDA/CE which delivered an overall positive picture. Audio home systems at -17% marked the other end of the scale. TVs were up 12%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 35 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**

Fact of the week

Germany

Great Britain

France



Italy

Spain

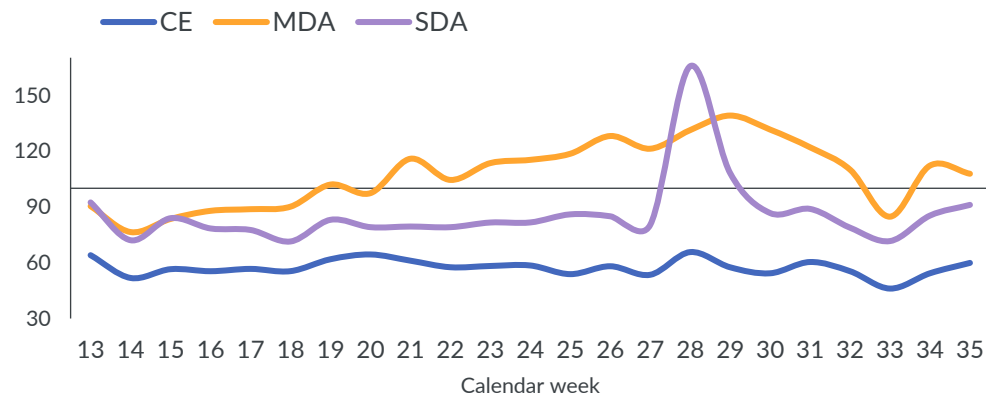
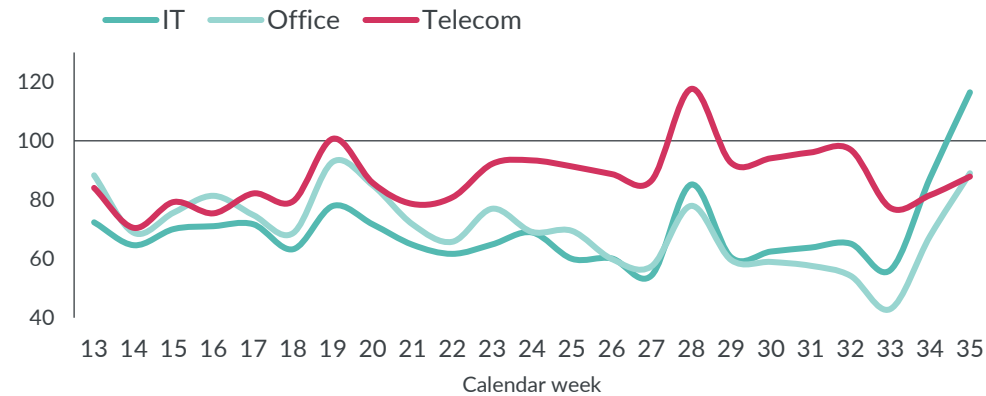
Russia

Japan

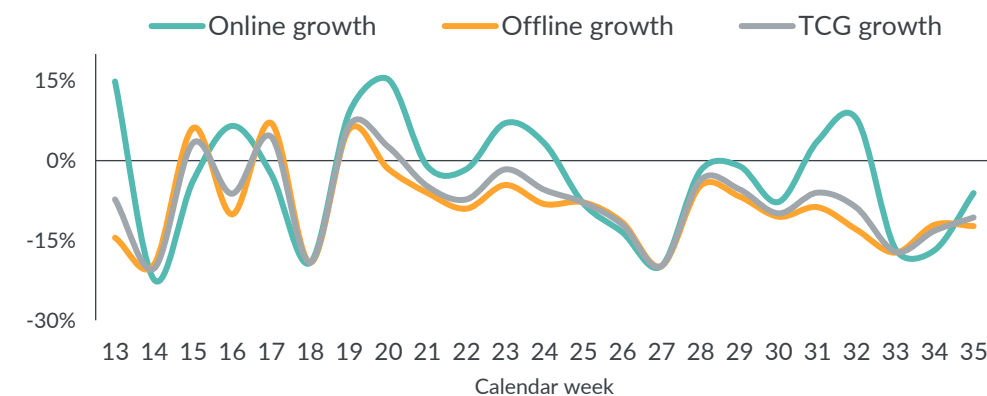
Brazil

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 35 (Aug 28 – Sep 03)



- Traditional retail delivered -12% and with online sales down -6%, there was a downswing for the total TCG market of 11%.
- Except for media tablets at +11%, all other IT/Office products decreased by double digits, led by desk computing at -20%. Smartphones decelerated at -10%.
- Air treatment was the best-performing category in week 35, at +39%. MDA/SDA categories delivered a mixed picture, ranging from +5% for vacuum cleaners to -13% for food preparation. Washing machines were flat. CE products lost in solid double digits (TVs posting -33%).

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 35 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



About **gfknewron**

Fact of the week

Germany

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France

Italy

➤ Spain

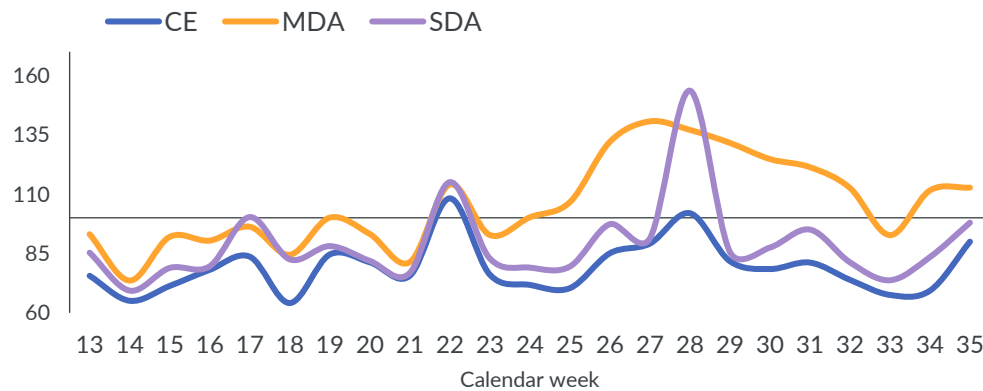
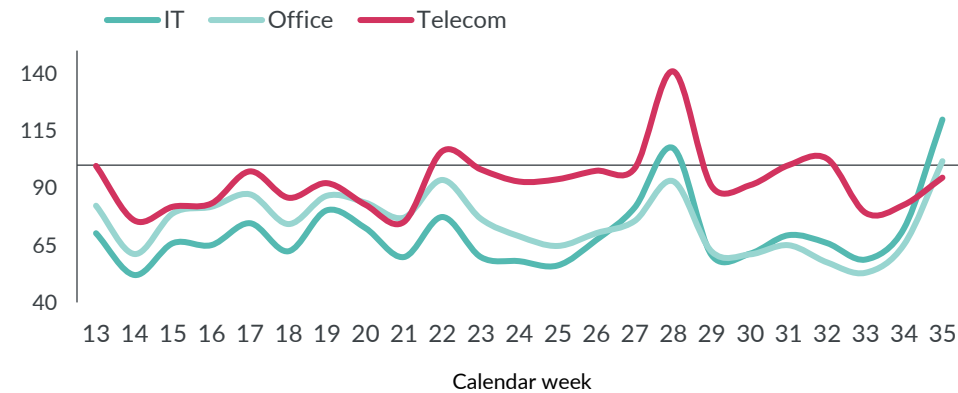
Russia

Japan

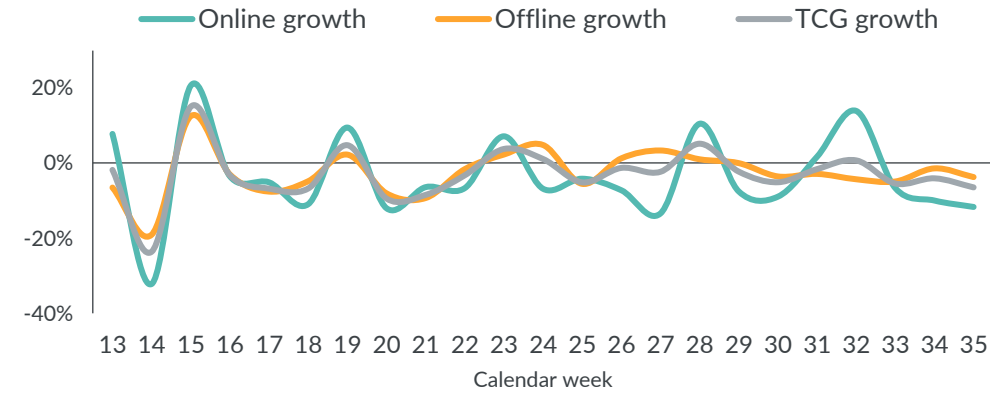
Brazil

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 35 (Aug 28 – Sep 03)



- Traditional retail experienced a minus of 4% versus week 35 in 2022. Combined with -12% for online sales this led to a downswing of 6% for the total TCG market.
- While media tablets posted +9%, the other IT/Office categories delivered negative trends, led by desk computing at -24%. Smartphones decelerated at -9%.
- Within MDA/SDA/CE products only hot beverage makers were able to grow (+9%). Washing machines were flat. TV sales slumped at -11%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 35 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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Fact of the week

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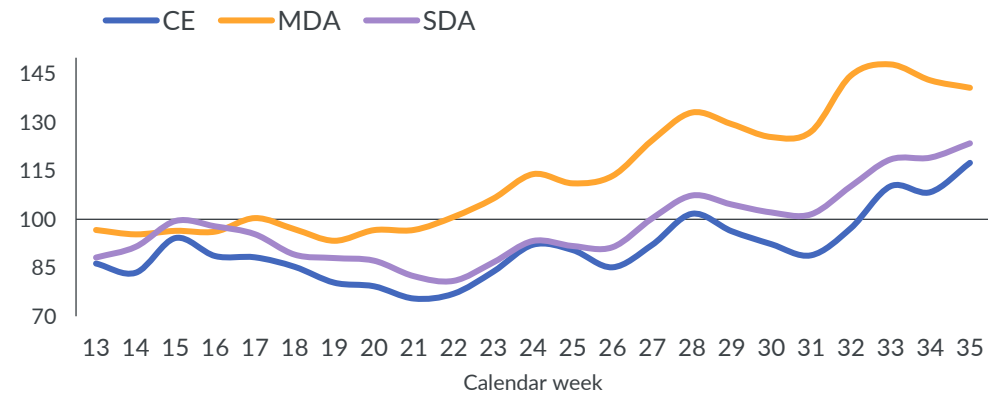
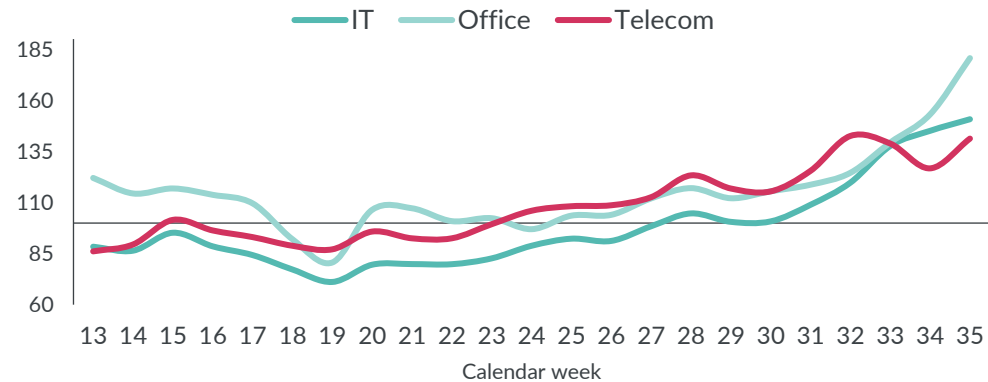
> Russia

Japan

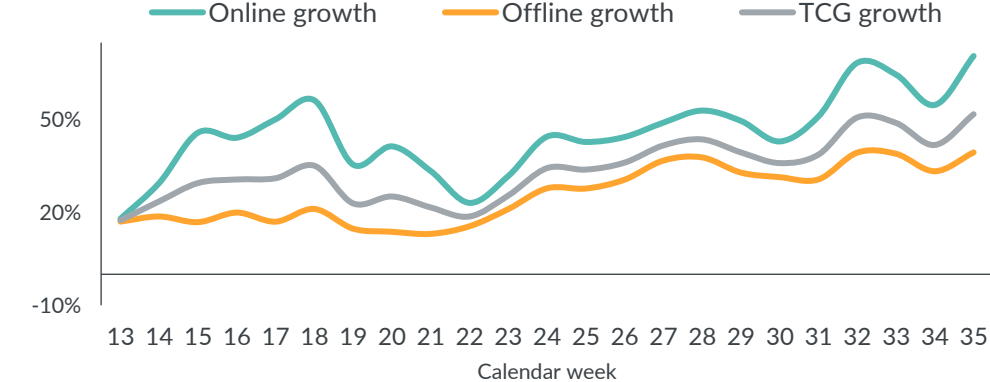
Brazil

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 35 (Aug 28 - Sep 03)



- The Russian TCG market continued its recovery, delivering +52% versus week 35 in 2022. Online sales at +71% were the driving force. Traditional retail added to it at +39%.
- Nearly all IT/Office and telecom categories increased by 30% or more, with media tablets out in front at +96%. Desk computing and monitors were slightly weaker at +25% and +27% respectively. Smartphones were up 63%.
- MDA/SDA/CE products delivered higher rates on average with audio home systems posting +82%. Food preparation was the weakest category at +17%. TV sales were up 49%.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 - 35 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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Fact of the week

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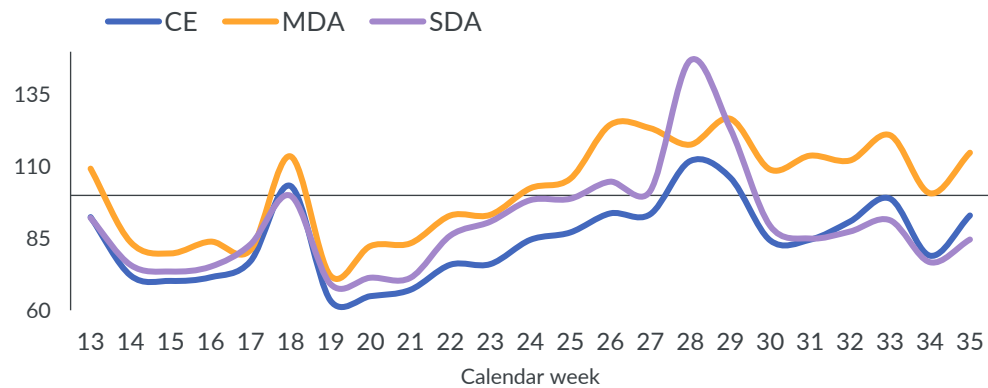
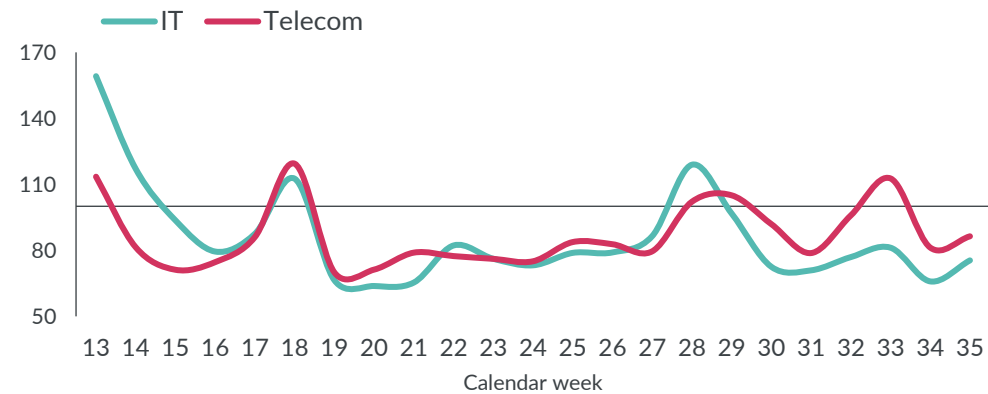
Russia

➤ Japan

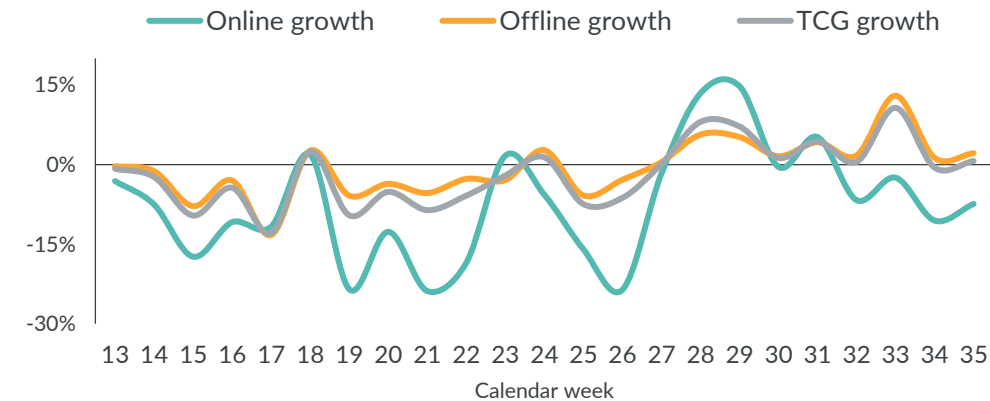
Brazil

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 35 (Aug 28 – Sep 03)



- Online sales delivered -7%. Combined with weak traditional retail at +2% this resulted slight uptick of 1% for the total TCG market.
- Mobile computing and media tablets decelerated at -17% and -9% respectively. While smartphones delivered +19%, headsets accelerated at +48%.
- Mixed trends for MDA/SDA products saw cooling in the lead at +10%. Air treatment at -26% marked the other end of the scale. CE categories delivered negative trends throughout with audio home systems the weakest at -28%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 35 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



About **gfknewron**

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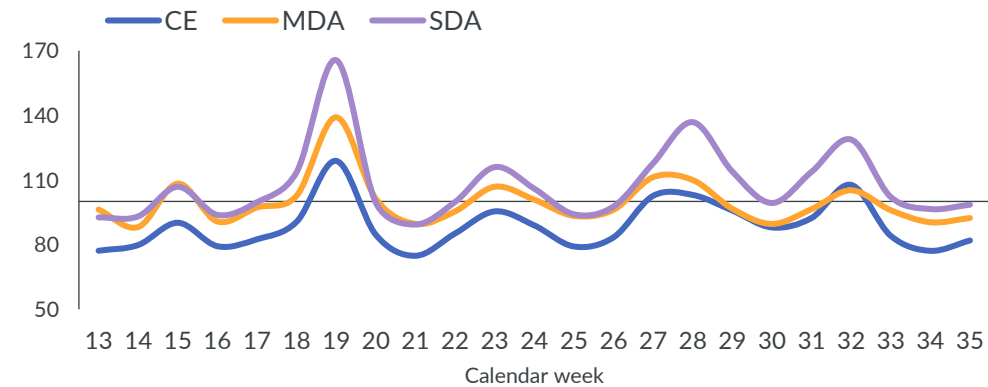
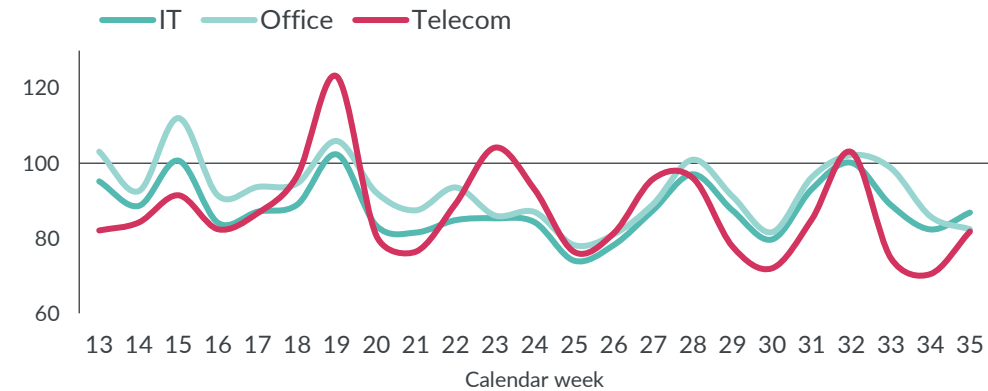
Russia

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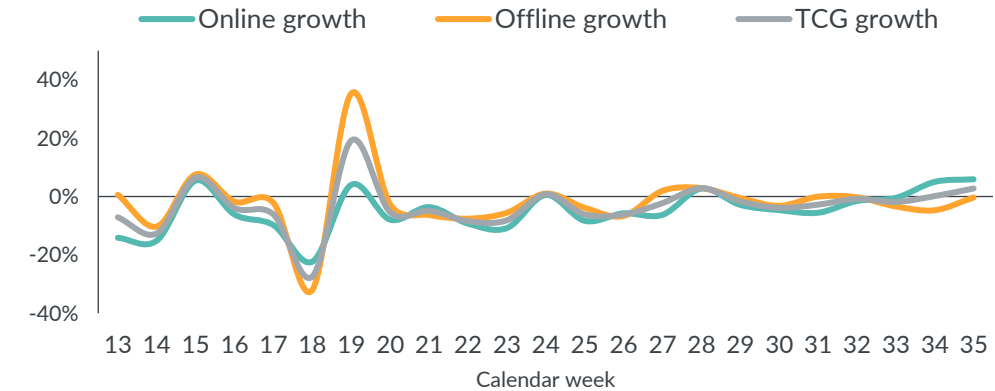
➤ Brazil

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 35 (Aug 28 – Sep 03)



- Online sales delivered growth of 6% but flat traditional retail left the total TCG market at a weak +3%.
- Media tablets at +31% were the best-performing category in week 35, while all other IT/Office categories posted negative trends, with inkjet printers delivering -17%. Smartphones accelerated at +7%.
- The overall positive picture for MDA and SDA product groups was determined by double-digit growth for most categories. Exceptions were +6% for food preparation and +8% for washing machines. TV sales experienced -8% in week 35 and audio home systems lost 25%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 35 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**

Fact of the week

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Italy

Spain

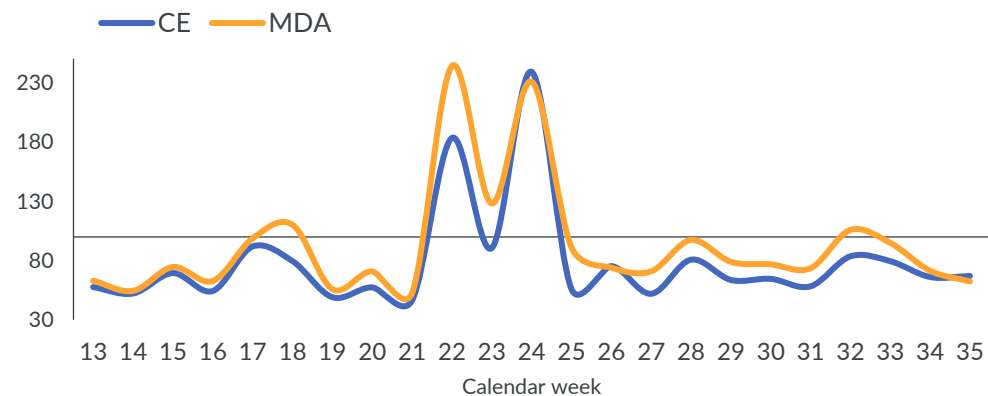
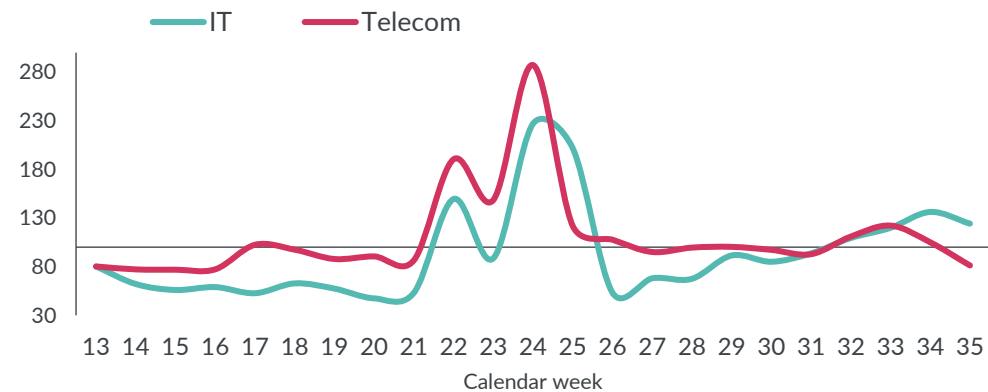
Russia

Japan

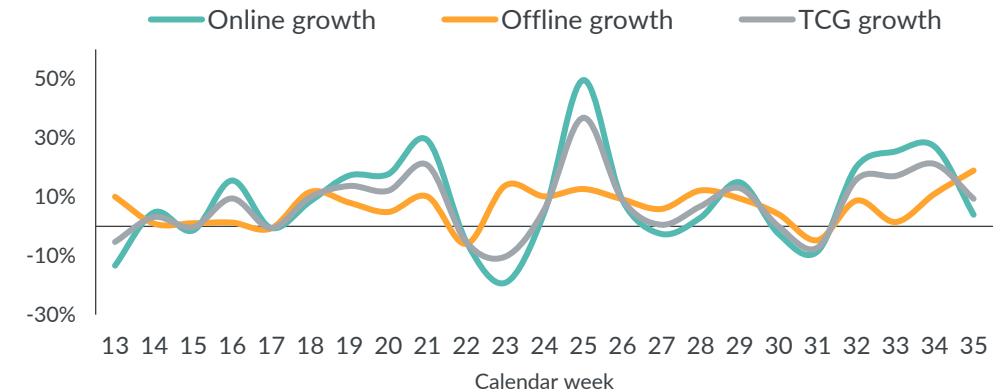
Brazil



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 35 (Aug 28 – Sep 03)



- A good rate for traditional retail (+19% in week 35) lifted the total TCG market to a plus of 9%. Online sales at +4% added to it.
- Smartphones were the driving force of this development, accelerating at +25%. Mobile computing delivered a minus of 6%.
- Week 35 in 2023 saw a strong decrease in TV sales (-21%). Cooling delivered -12% and washing machines lost 10%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 35 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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