



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 174
cw38/2023

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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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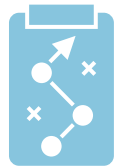
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Fact of the Week



Among the most important product features in Digital Still Cameras, battery life and video resolution expanded

About **gfknewron**

gfknewron | Photo | Survey question: Which of these product features were most important to your final choice? | Q1 2023

> Fact of the week

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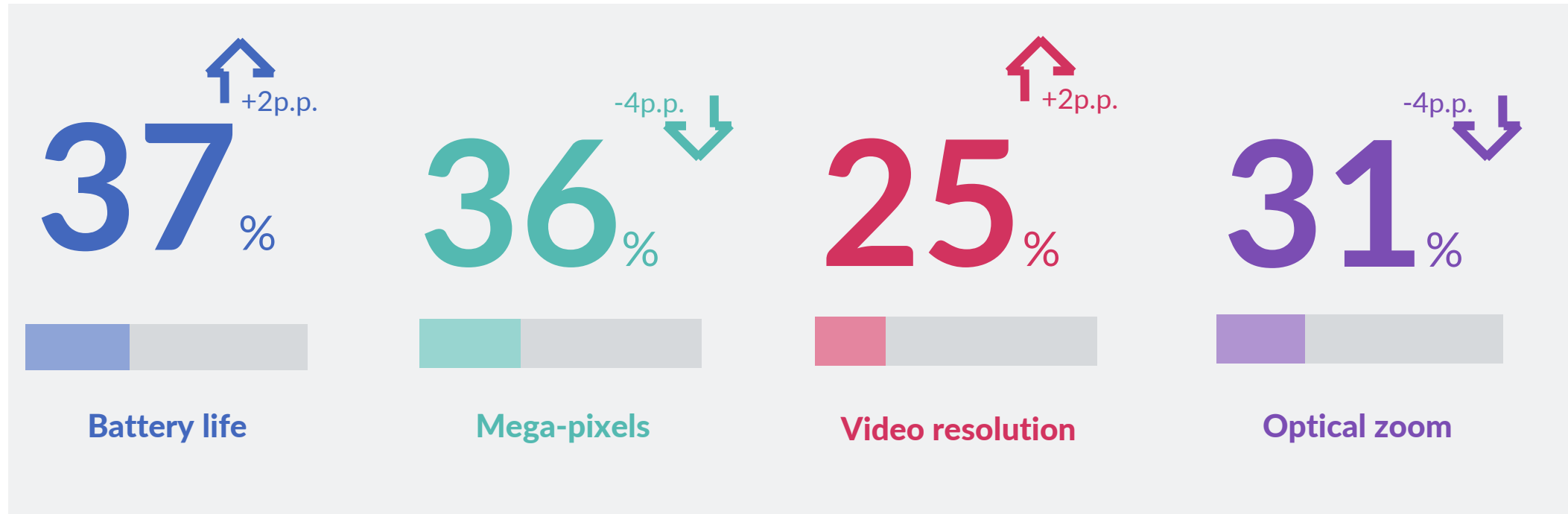
Spain

Russia

Japan

Brazil

China



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

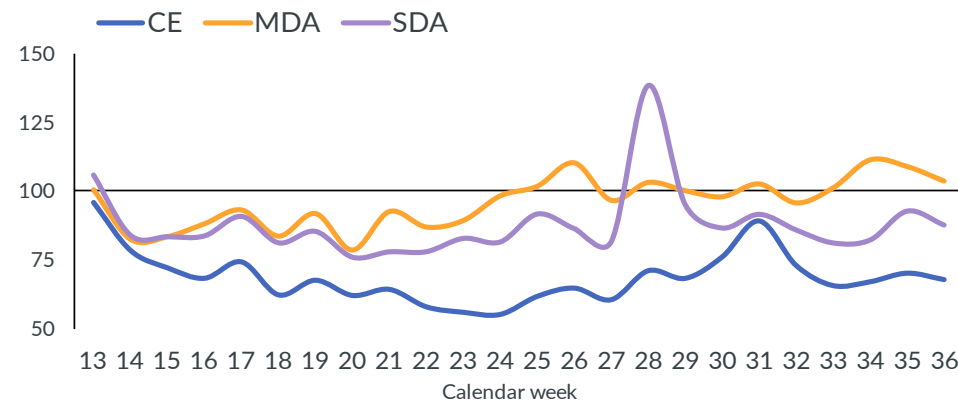
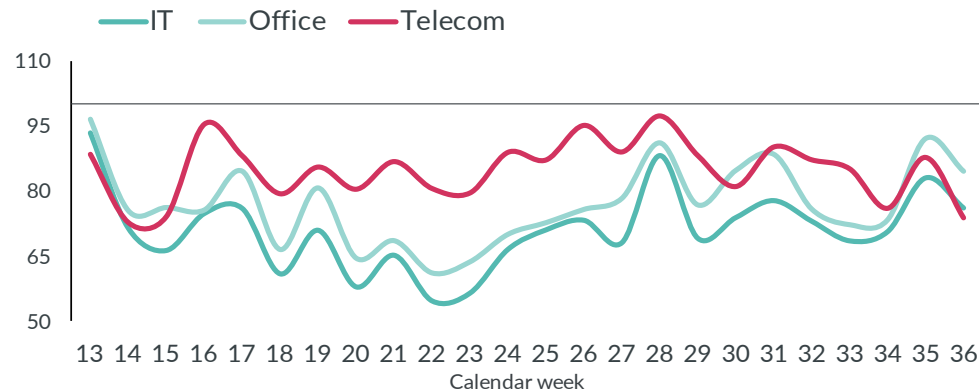
Russia

Japan

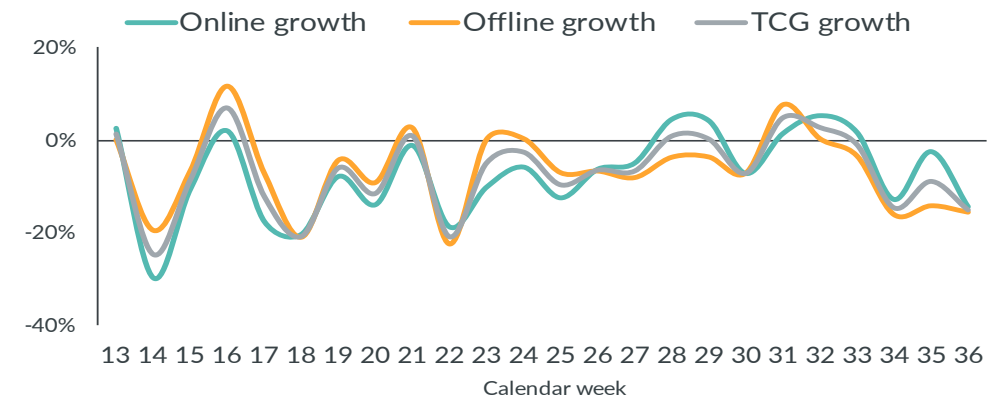
Brazil

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 36 (Sep 04 – Sep 10)



- Traditional retail at -17% and online sales at -16% dragged the total TCG market down by 17%.
- Except for monitors at -4%, all other IT/Office products posted negative double-digit trends of between -18% and -23%. Smartphones slumped at -21% in week 36.
- While CE products lost in double digits throughout (with TVs posting -12%), food preparation (+23%) was the best-performing product group within MDA/SDA products. Dental care delivered +18%. Vacuum cleaners at -11% marked the other end of the scale.

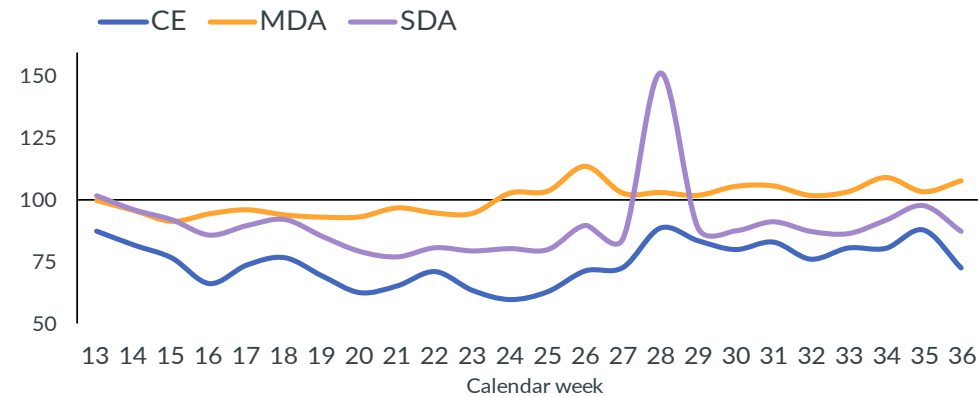
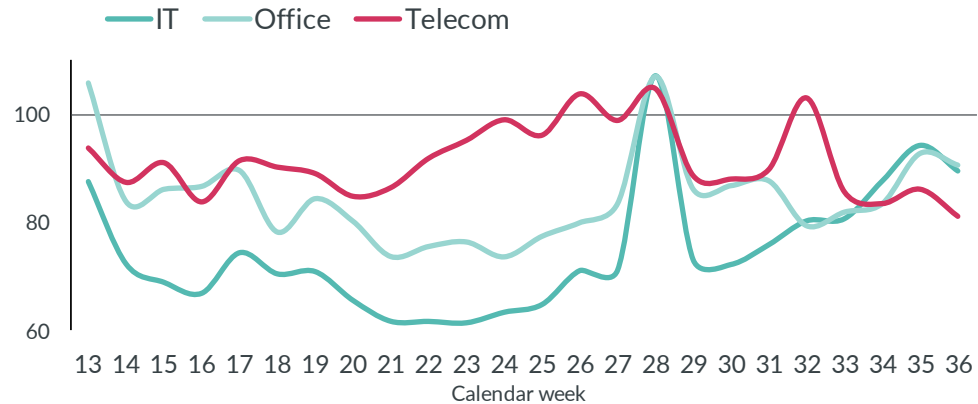
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

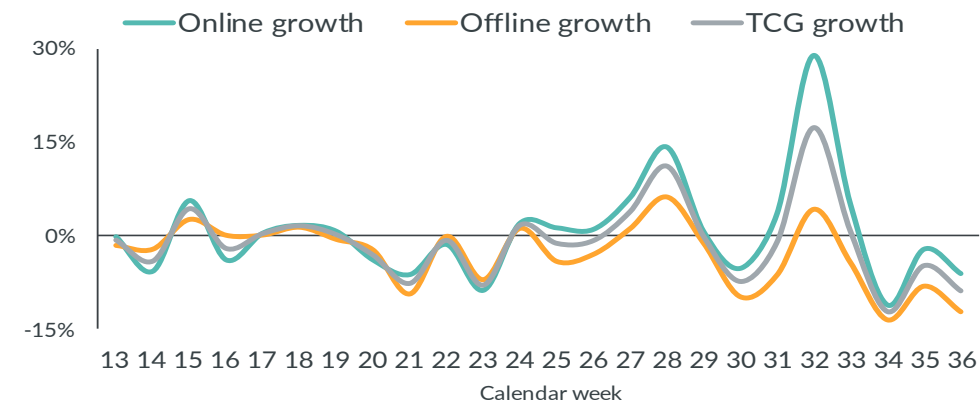


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 36 (Sep 04 – Sep 10)



- The deceleration of traditional retail (-12%) dragged the total TCG market down by -9%. Online sales added to it by delivering -6%.
- Except for flat keyboard sales, all other IT/Office products delivered negative trends, led by media tablets and desk computing at -36%. Smartphones lagged at -8%.
- CE products declined throughout with audio home systems in the lead at -29% and TVs posting -11%. Except for vacuum cleaners at -5% and cooling down 1%, all other MDA/SDA categories delivered positive rates with shavers even up 15%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 36 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

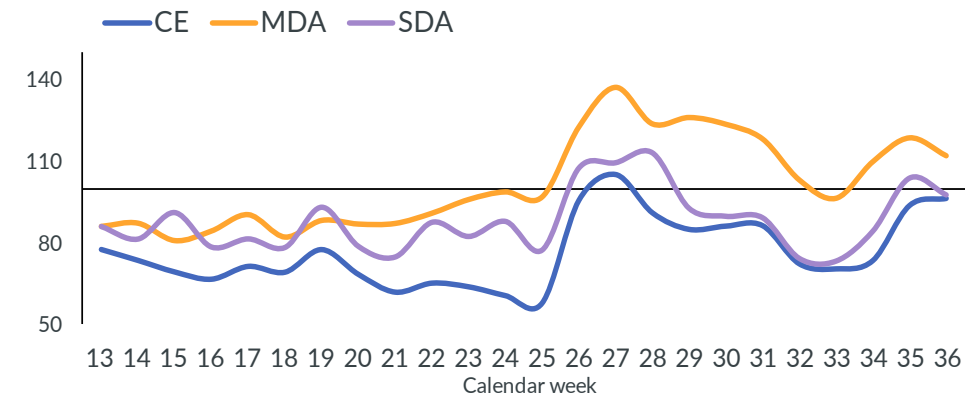
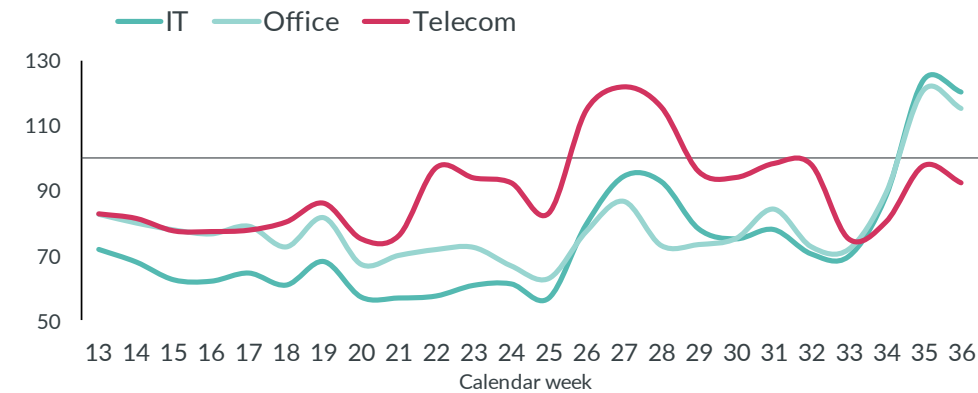
Weekly retail insights from the Point of Sale

Spotlight on France

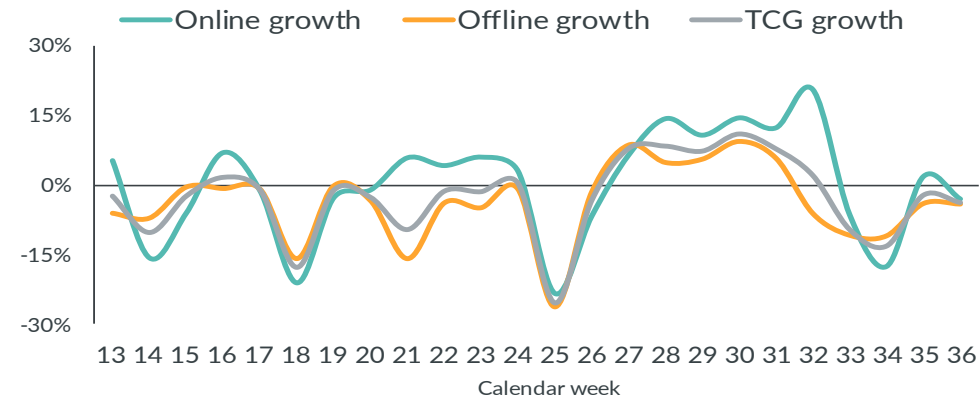


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 36 (Sep 04 – Sep 10)



- In week 36, online sales lagged at -3% and traditional retail fell by 4% which led to -4% for the total TCG market.
- Except for mice (+1%), IT/Office products declined by rates between -24% for laser printers to -3% for keying devices. Smartphones lagged at -7%. Headsets were up 2%.
- Air treatment again posted an eye-catching increase of 356%. All other SDA products posted negative rates except hot beverage makers at +2%. Cooling and washing machines were slightly up. TV sales grew by 12% and audio home systems decelerated at -24%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 36 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

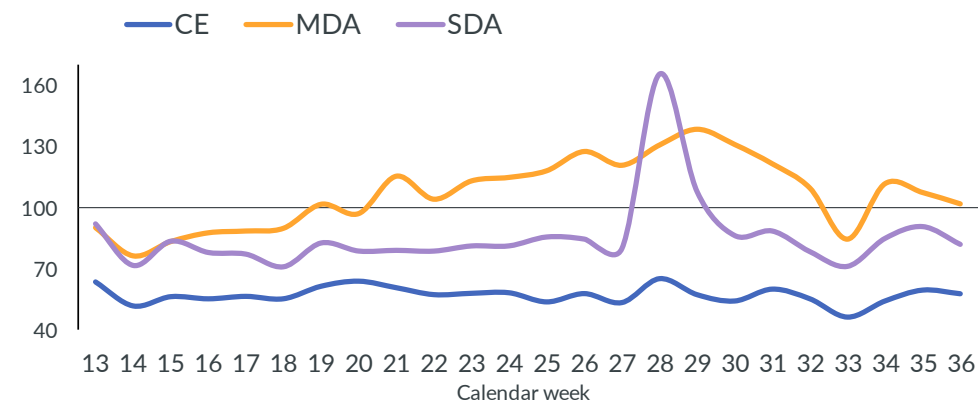
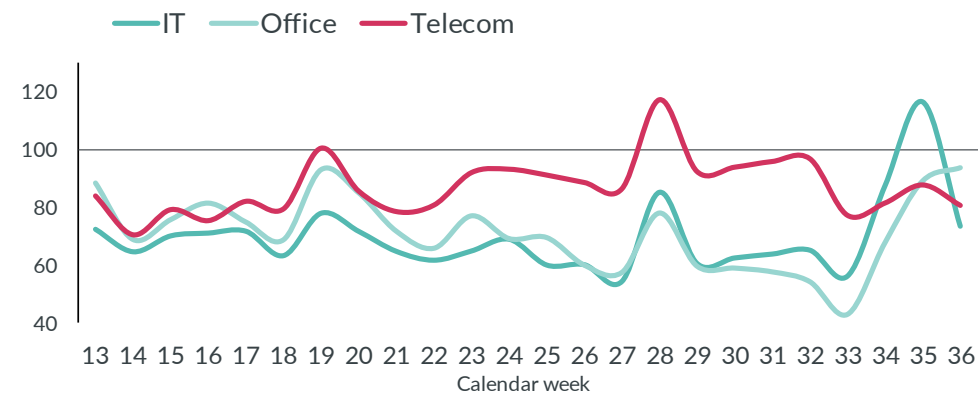
Weekly retail insights from the Point of Sale

Spotlight on Italy

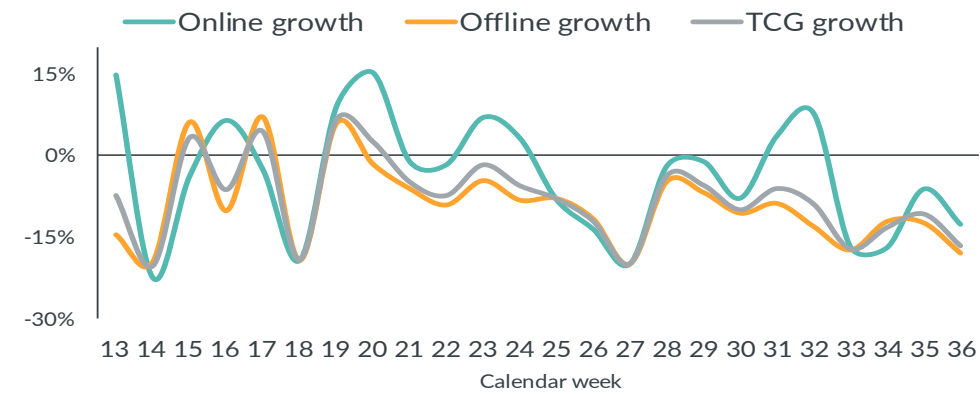


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 36 (Sep 04 – Sep 10)

- Traditional retail delivered -18% and with online sales down -13%, resulting in a downswing for the total TCG market of 17%.
- Week 36 saw strong deceleration for IT/Office products with mobile computing in the lead at -30% and inkjet printers hit least at -16%. Smartphones slumped at -14%.
- The mixed picture for MDA/SDA products showed slight increases (e.g., food preparation up 6%) but also losses (e.g., -19% for vacuum cleaners). CE products declined in solid double digits (TVs posting -30%).

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 36 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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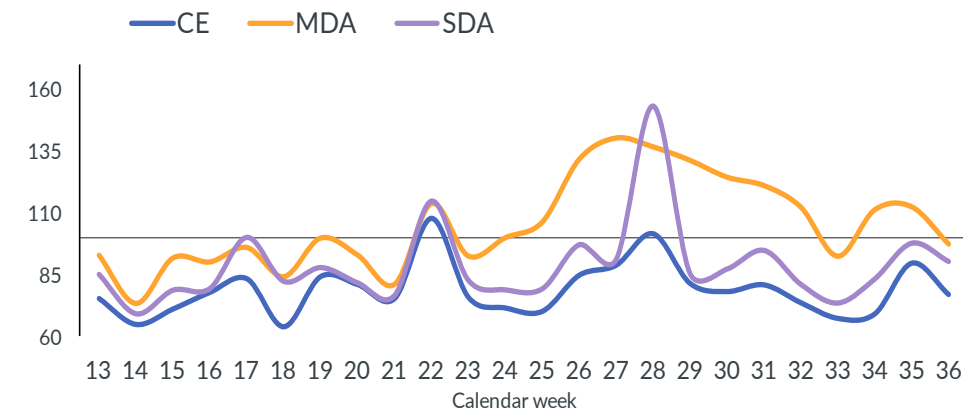
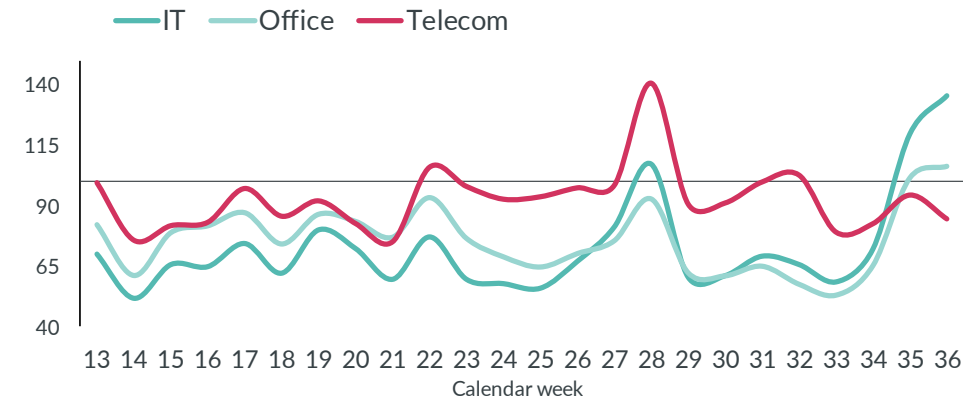
Russia

Japan

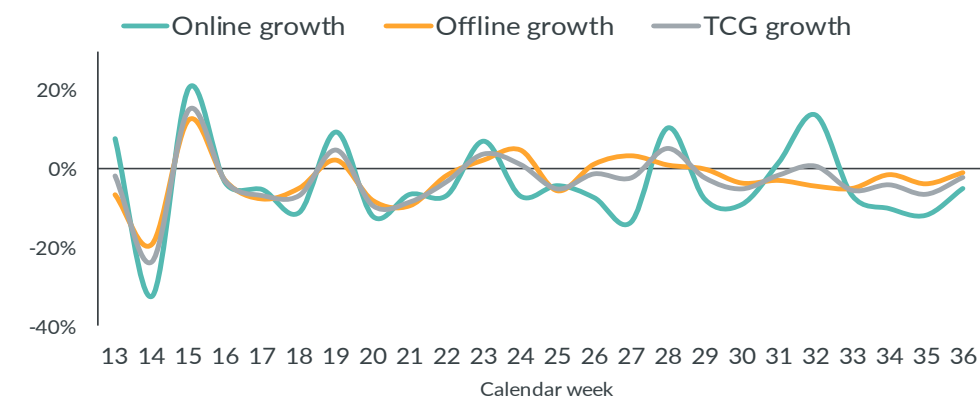
Brazil

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 36 (Sep 04 – Sep 10)



- Traditional retail experienced a slight minus of 1% versus week 36 in 2022. Combined with -5% for online sales this led to a downswing of 2% for TCG.
- While media tablets at +15% drove the performance of IT/Office categories, desk computing slumped at -16%. Smartphones fell at -16%.
- While CE products declined throughout (with audio home systems posting -13%), MDA/SDA categories were positive except for cooling which decreased by 10%. Washing machines were flat. Sales of hot beverage makers gained 14%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 36 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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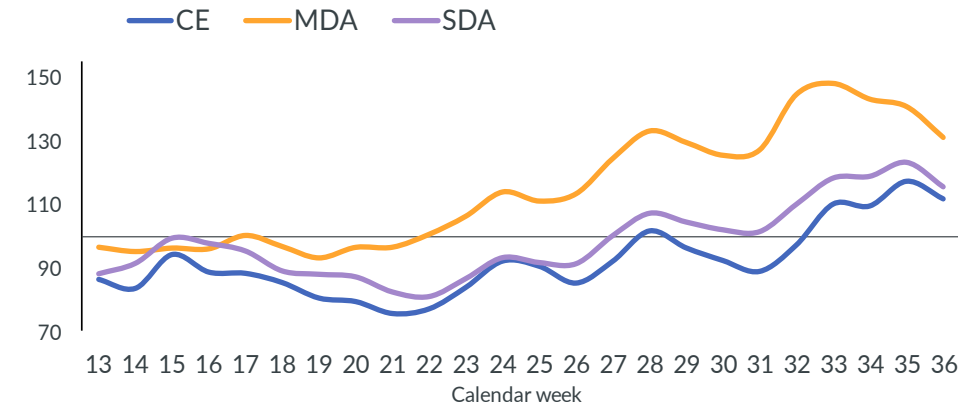
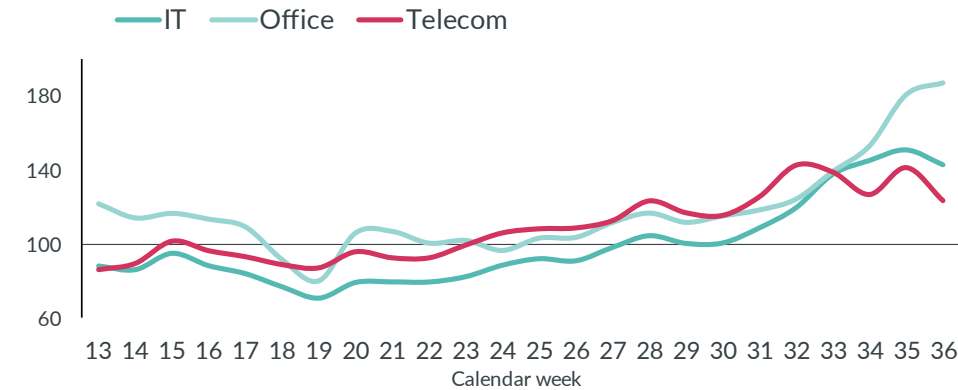
> Russia

Japan

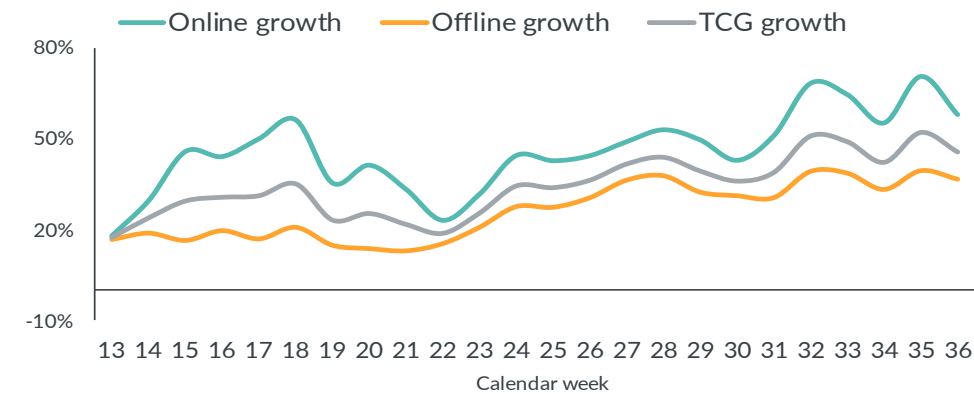
Brazil

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 36 (Sep 04 - Sep 10)



- The Russian TCG market continued its recovery, delivering +46% versus week 36 in 2022. Online sales at +58% were the driving force. Traditional retail added to it at +37%.
- Nearly all IT/Office and telecom categories increased by 30% or more, with media tablets out in front at +87%. Monitors were the weakest category at +21%. Smartphones accelerated at +50%.
- MDA/SDA/CE products delivered growth as well with audio home systems in the lead at +68% and food preparation posting +11%. Dental care was weak, just +1% in week 36.

Source: GfK Market Intelligence: Sales Tracking, Russia; Calendar week 1 2022 – 36 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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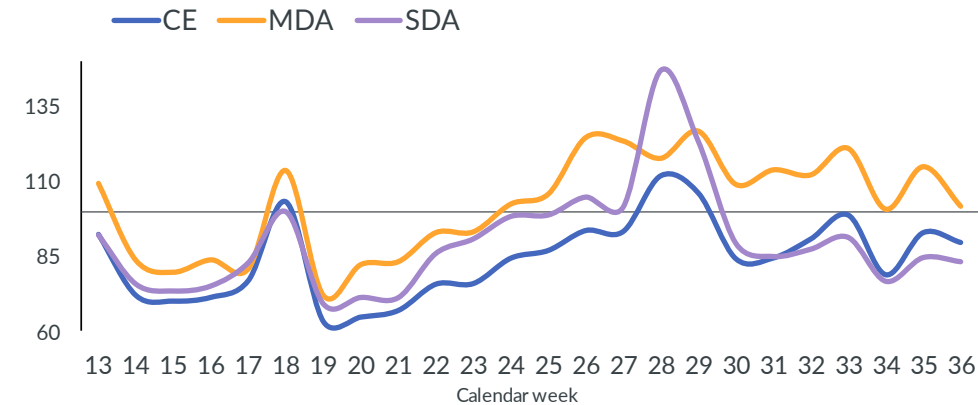
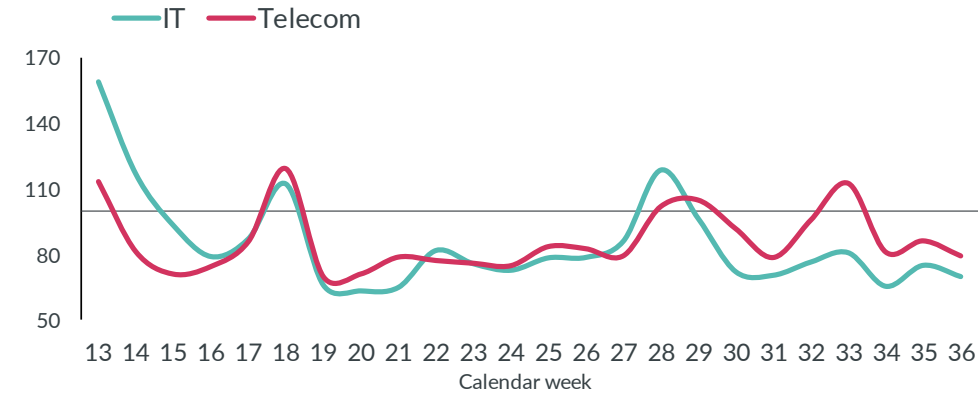
Russia

➤ Japan

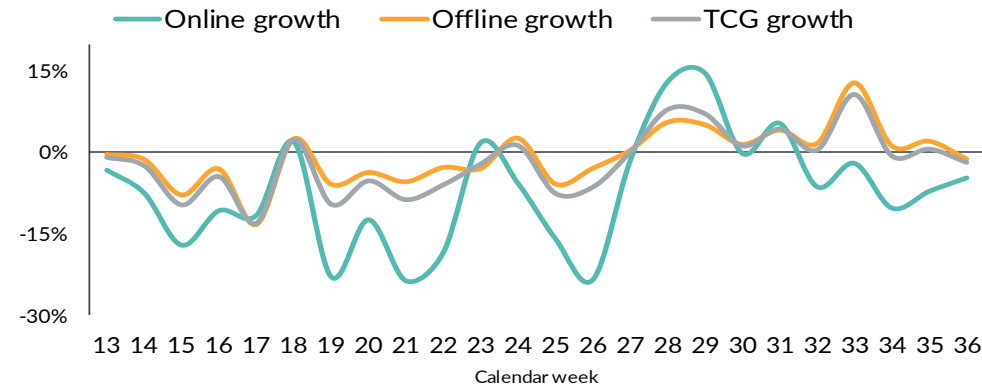
Brazil

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 36 (Sep 04 – Sep 10)



- Online sales delivered -5%. Combined with weak traditional retail at -1% this resulted in -2% for the total TCG market.
- Mobile computing and media tablets both decelerated at -16% and -7% respectively. While smartphones delivered +22%, headsets posted +11%.
- Mostly negative trends for MDA/SDA/CE products saw air treatment losing 19% and audio home systems down 15%. Dental care accelerated at +19%. Soundbars were flat.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 36 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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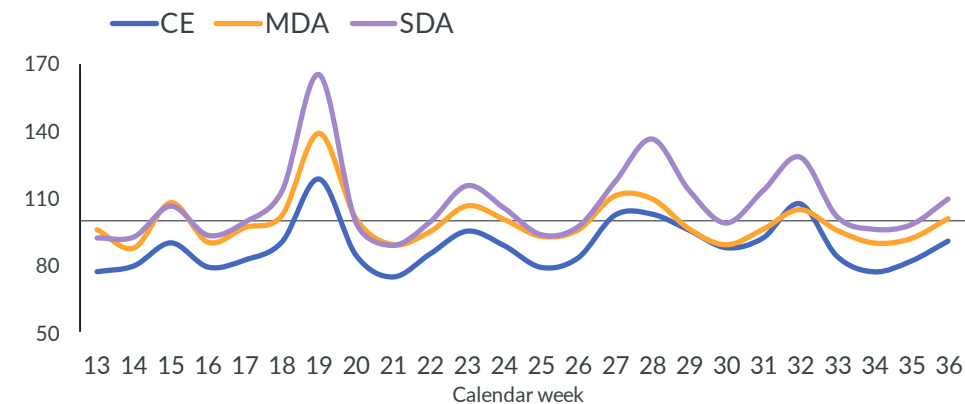
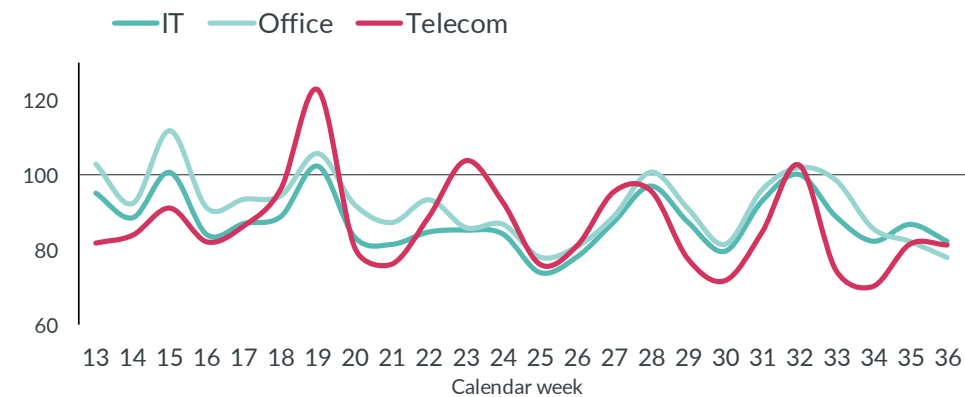
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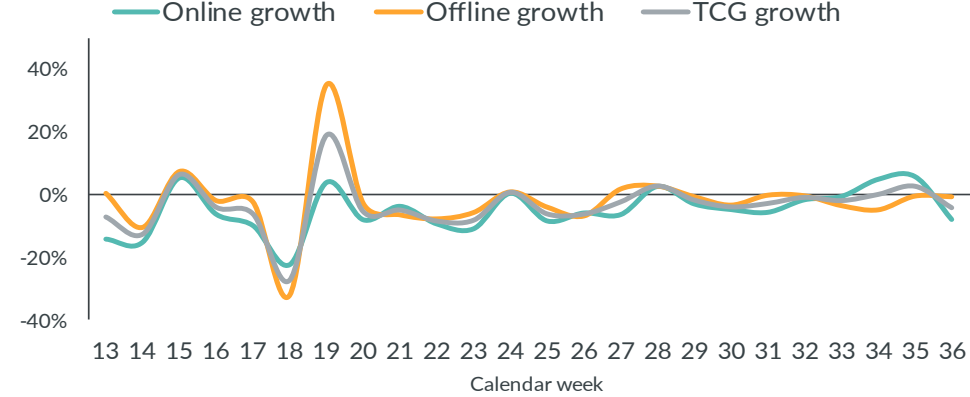
➤ Brazil

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 36 (Sep 04 – Sep 10)



- Online sales delivered -8% and with traditional retail down -1%, the result was a downswing for the total TCG market of 4%.
- Media tablets at +21% were the best-performing category in week 36, while most other IT/Office categories posted negative trends, with inkjet printers delivering -19%. Desk computing was flat. Smartphones slumped at -12%.
- The overall positive picture for MDA and SDA product groups was determined by double-digit growth for most categories apart from +6% for washing machines. TV sales experienced -7% in week 36 and audio home systems lost 26%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 36 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 – 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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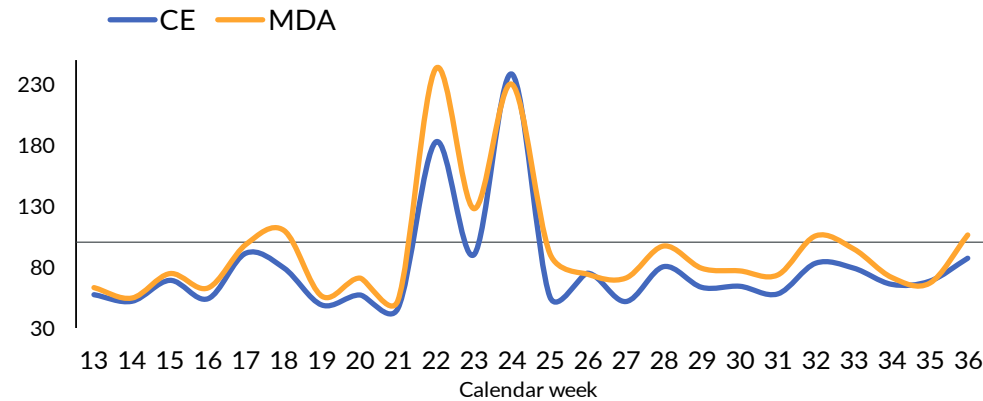
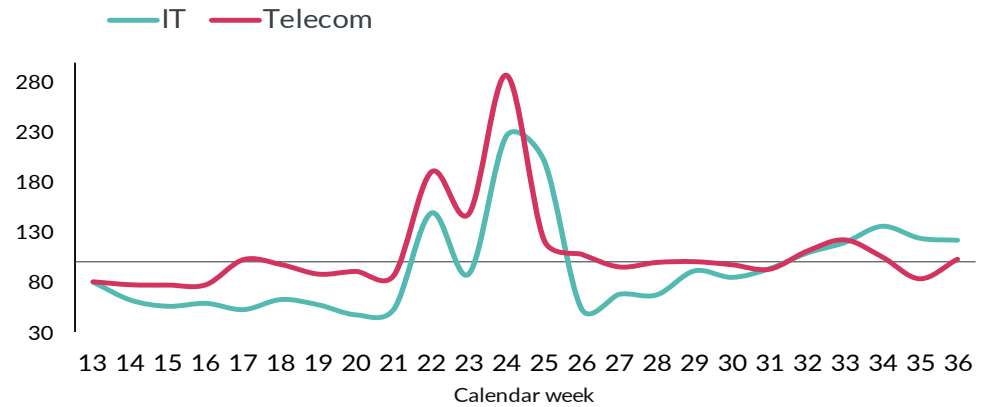
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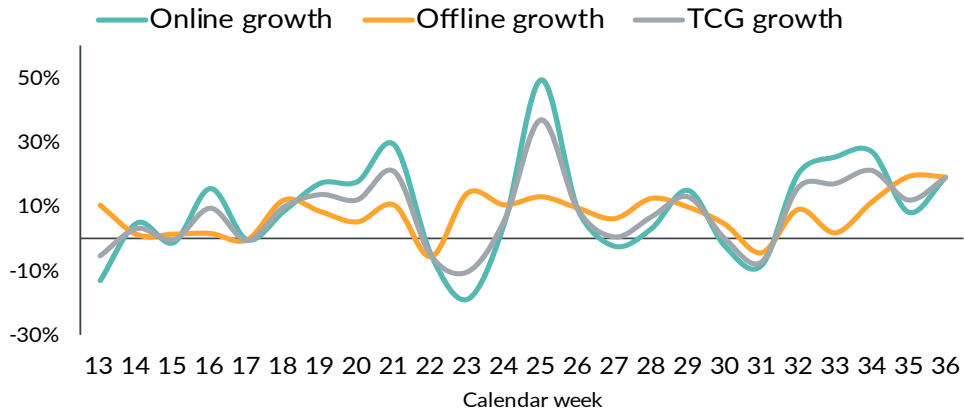
Brazil

> 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 36 (Sep 04 – Sep 10)



- At an identical rate of +19%, both traditional and online retail lifted the total TCG market by +19%. .
- Smartphones (+42%) were the driving force of this development, especially the online sales of smartphones. Mobile computing were weak at -3%.
- Week 36 in 2023 saw decreases for washing machines (-8%) and cooling (-2%). TV sales slumped at -18%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 36 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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