



An NIQ  
Company

# State of consumer technology and durables sales tracker

Weekly trends and insights for  
the tech and durables market

Edition 177  
cw41/2023

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# Take the effort out of analyzing data

Get quick, easy and comprehensive access to your business intelligence



## > About **gfknewron**

Fact of the week

Germany

Great Britain

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Italy

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Japan

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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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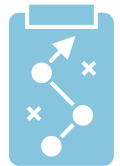
**gfknewron** gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



**Act in seconds** to control your future with AI-powered recommendations



**Outperform expectations** and give decision-makers data at their fingertips



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# Fact of the Week

Health and wellbeing demand has stagnated after an unprecedented surge in demand during the pandemic



About **gfknewron**

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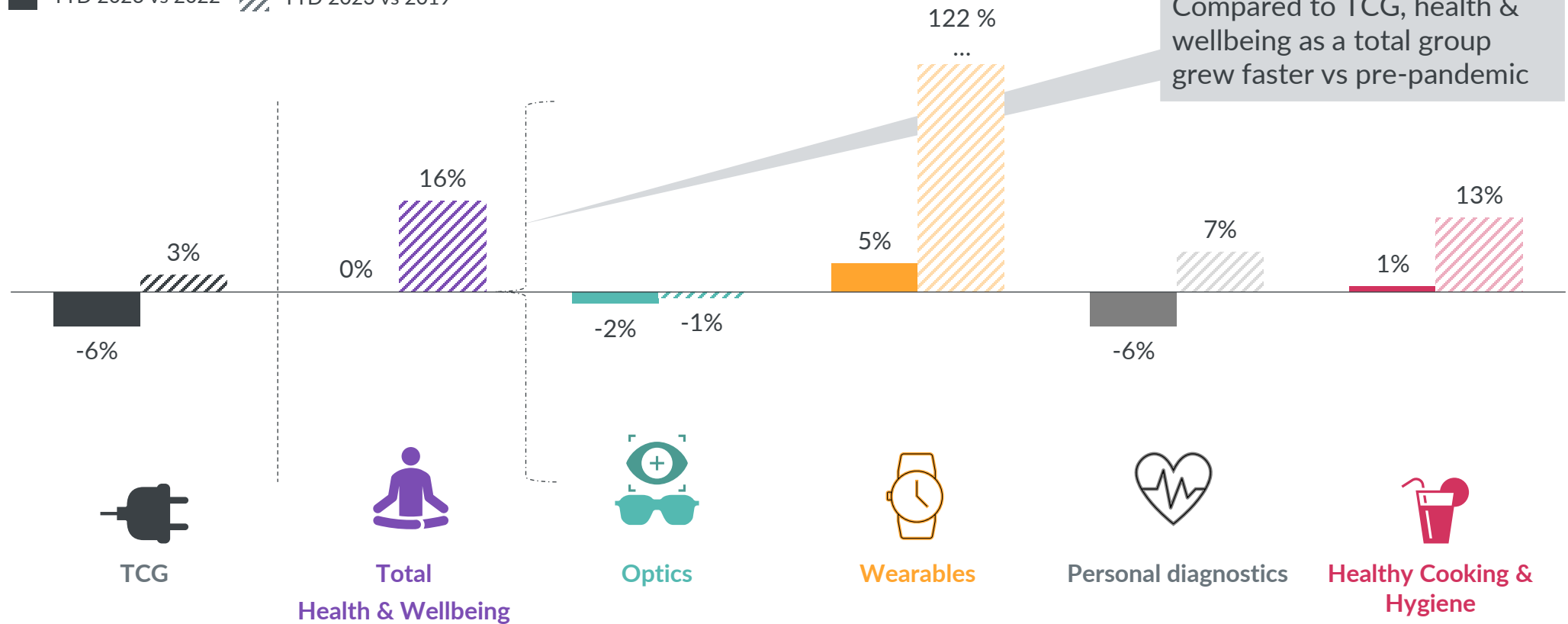
Japan

Brazil

China

Sales value growth | USD | Jan-Jun 2023 YTD

■ YTD 2023 vs 2022    ▨ YTD 2023 vs 2019



Source: GfK Market Intelligence: Sales Tracking, Retailer Market, international coverage wo NA, sales revenue growth USD Jan-Jun 2023 vs Jan-Jun 2022 vs Jan-Jun 2019  
CE incl. multifunctional technical devices, SDA incl. personal diagnostics, healthy cooking & hygiene includes hot air fryers, dental care, water filters, liquidizers & masticating juicers & air treatment, optics incl. spectacle lenses & frames, contact lenses, and sunglasses.

# Weekly retail insights from the Point of Sale

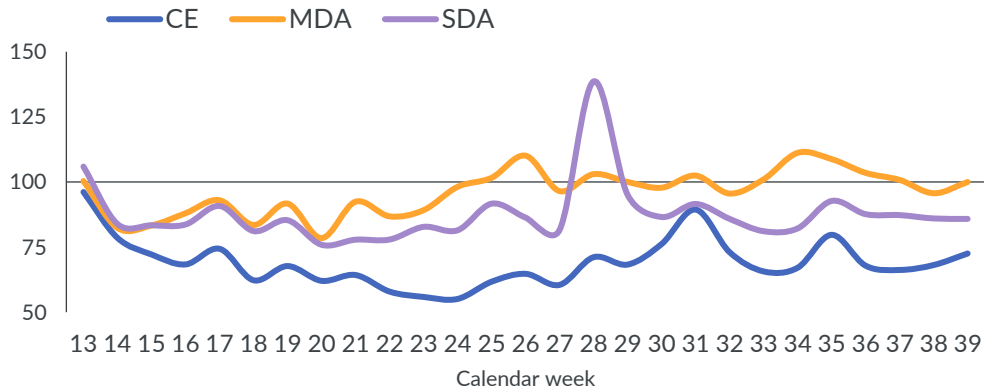
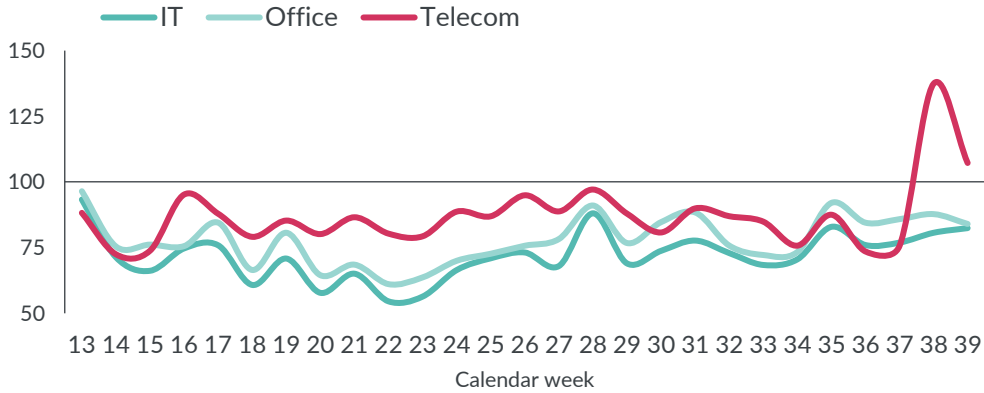
## Spotlight on Germany



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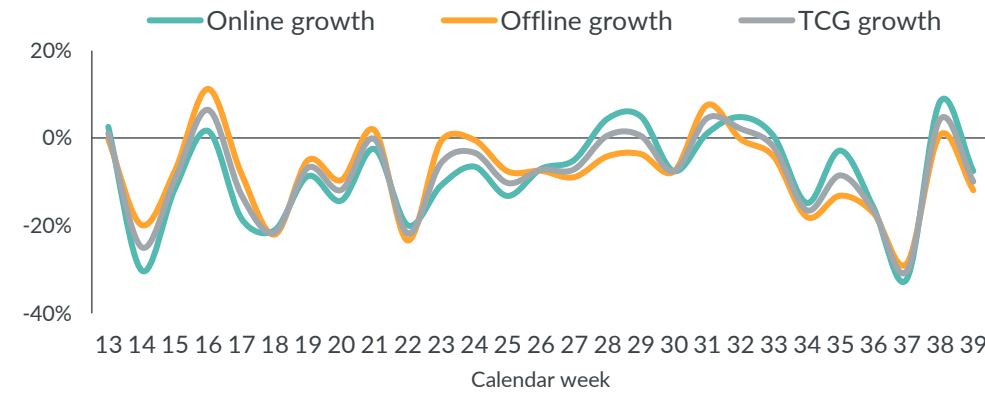
Please note: Below lines depict a sales index vs an average 2022 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2022).

Index: 2022 average weekly turnover in EUR = 100



Please note: Below lines depict the sales growth rate vs same week of previous year.

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



### Key take aways in calendar week 39 (Sep 25 – Oct 01)



- After good results in week 38, both distribution types dropped in week 39, traditional retail by 12% and online sales by 8%, resulting in -10% for the total TCG market.
- All IT/Office products posted double-negative trends digit between -11% and -23%. Smartphones decreased by 5%.
- While CE products lost in solid double digits throughout (with TVs posting -19% and audio home systems dropping by 30%), air treatment (+11%) was the best-performing product group within MDA/SDA products. Food preparation declined by 16%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 39 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop 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.

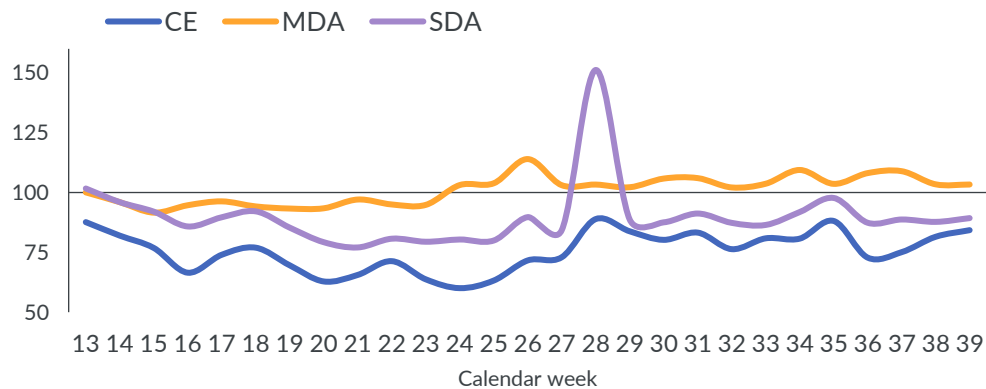
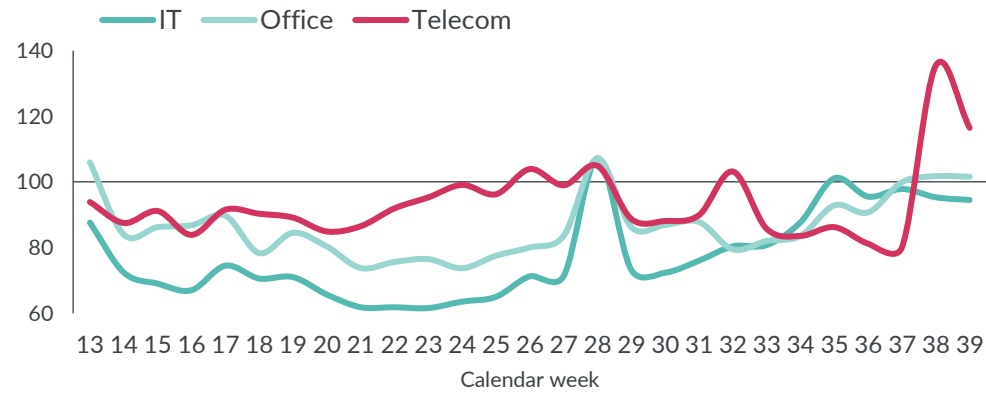
# Weekly retail insights from the Point of Sale

## Spotlight on Great Britain

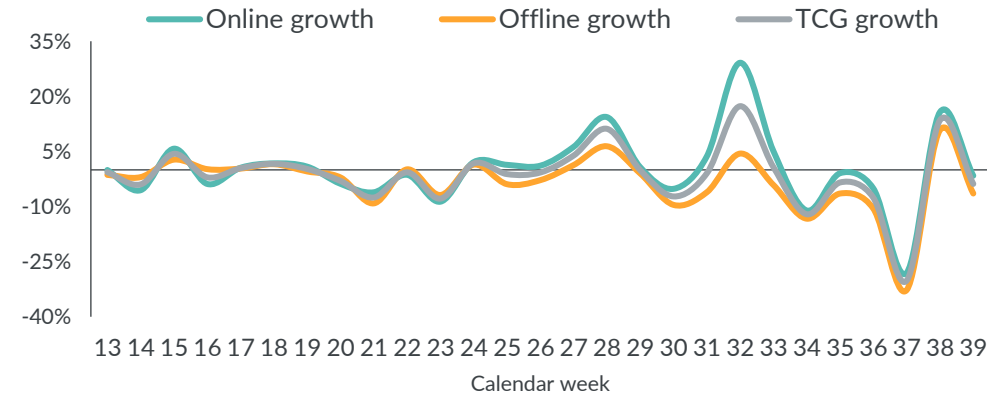


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Index: 2022 average weekly turnover in EUR = 100



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



### Key take aways in calendar week 39 (Sep 25 - Oct 01)

- Deceleration of traditional retail at -6% combined with a slight drop of 2% for online sales led to a minus of 4% for the total TCG market.
- Except for mice at +1%, all other IT/Office products delivered negative trends from -3% for keyboards to -29% for laser printers. Smartphones were flat at +0.8%.
- While CE products lost in solid double digits throughout (with TVs posting -10% and audio home systems dropping by 35%), MDA/SDA categories posted a mixed picture with rates of +8% for dental care and -9% for cooling. Washing machines and vacuum cleaners were flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 39 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

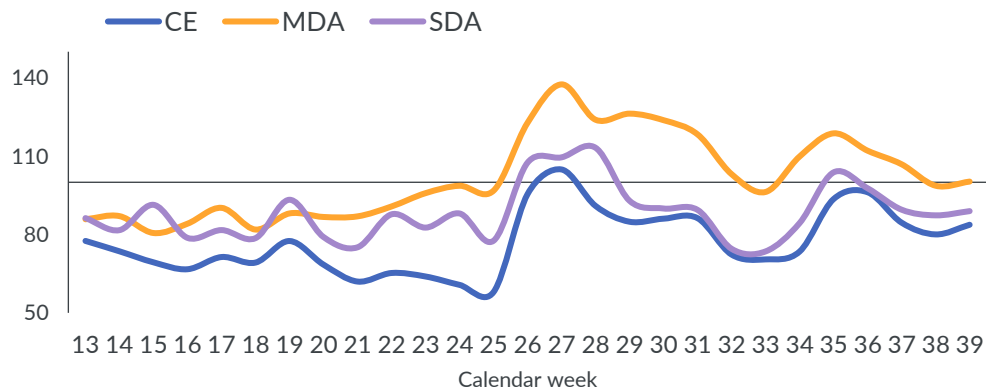
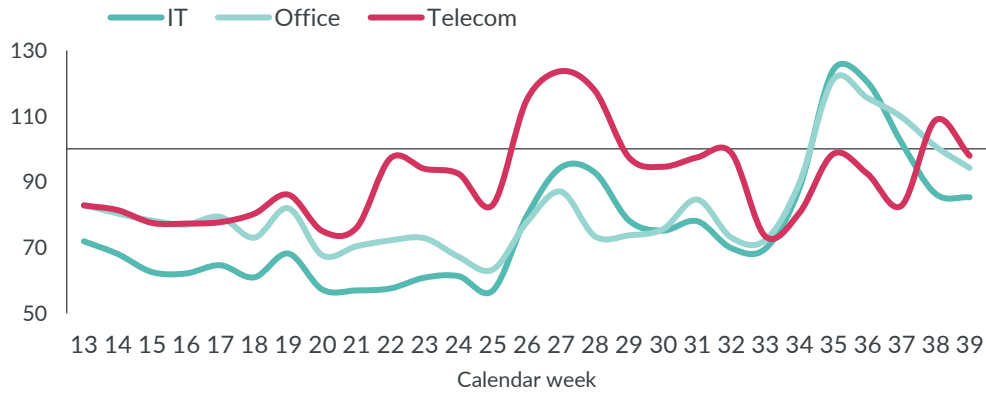
# Weekly retail insights from the Point of Sale

## Spotlight on France

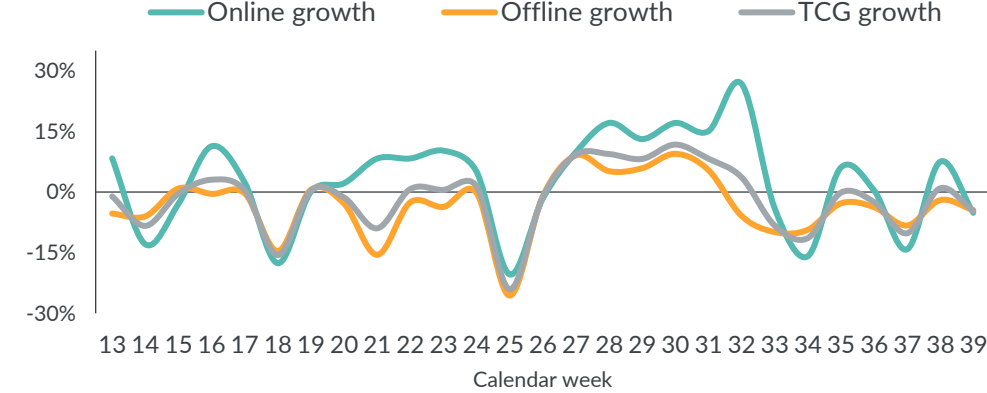


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Index: 2022 average weekly turnover in EUR = 100



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



### Key take aways in calendar week 39 (Sep 25 - Oct 01)



- At an identical rate of -5%, both traditional retail and online sales retail dragged the total TCG market down by -5%.
- Mostly negative trends for IT/Office products ranged from -28% for desk computing and laser printers to -7% for keyboards and monitors. Only mice at +1% were slightly positive. Smartphones accelerated at +8%.
- After six weeks of extraordinary growth, air treatment delivered just +10% in week 39. The only other positive category was shavers at +4%. At -18%, food preparation marked the other end of the scale. CE products posted negative trends throughout with TV sales dropping 9%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 39 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, 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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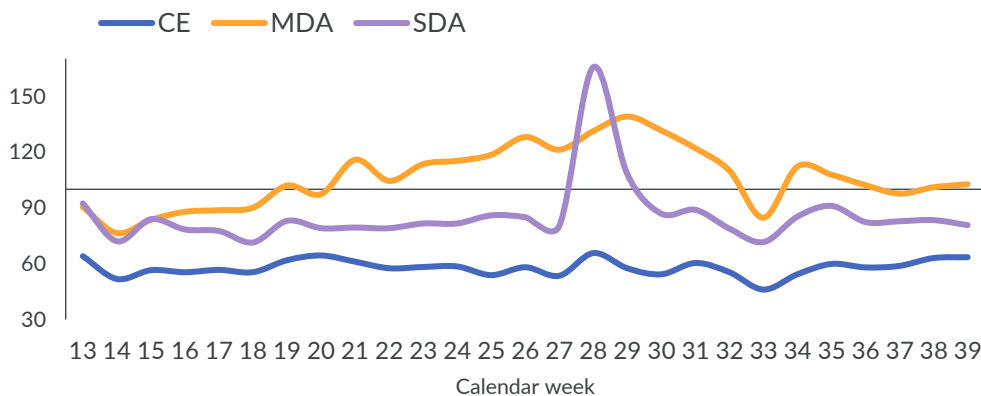
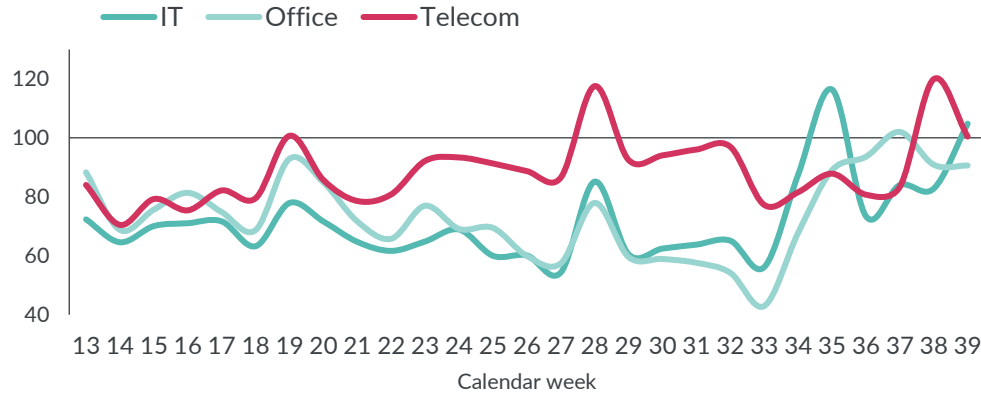
Spain

Japan

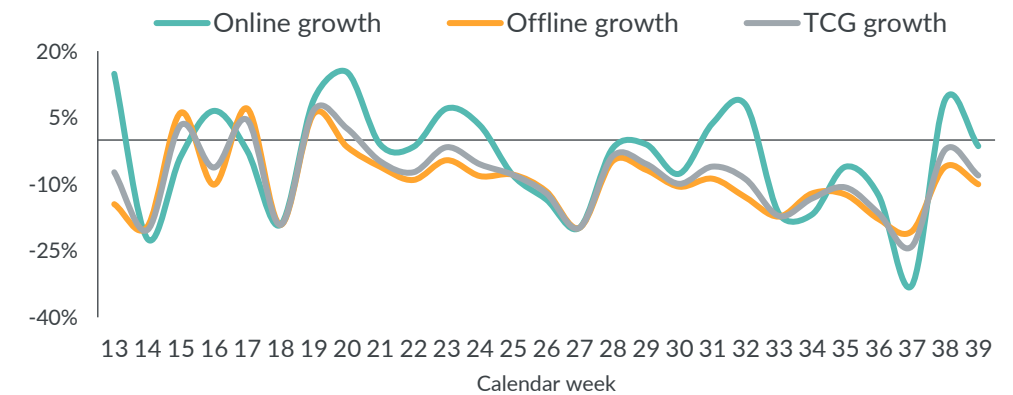
Brazil

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 39 (Sep 25 - Oct 01)



- Deceleration of traditional retail (-10%) dragged the total TCG market down by -8%. Online sales added to it by delivering -1%.
- Except for media tablets at +3%, all other IT/Office products decreased by double digits, led by laser printers at -24%. Smartphones were stable.
- MDA categories were slightly positive with cooling at +3% and washing machines at +1%. SDA products lost throughout with air treatment in the lead at -19%. CE products experienced negative trends, led by audio home systems at -43%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 39 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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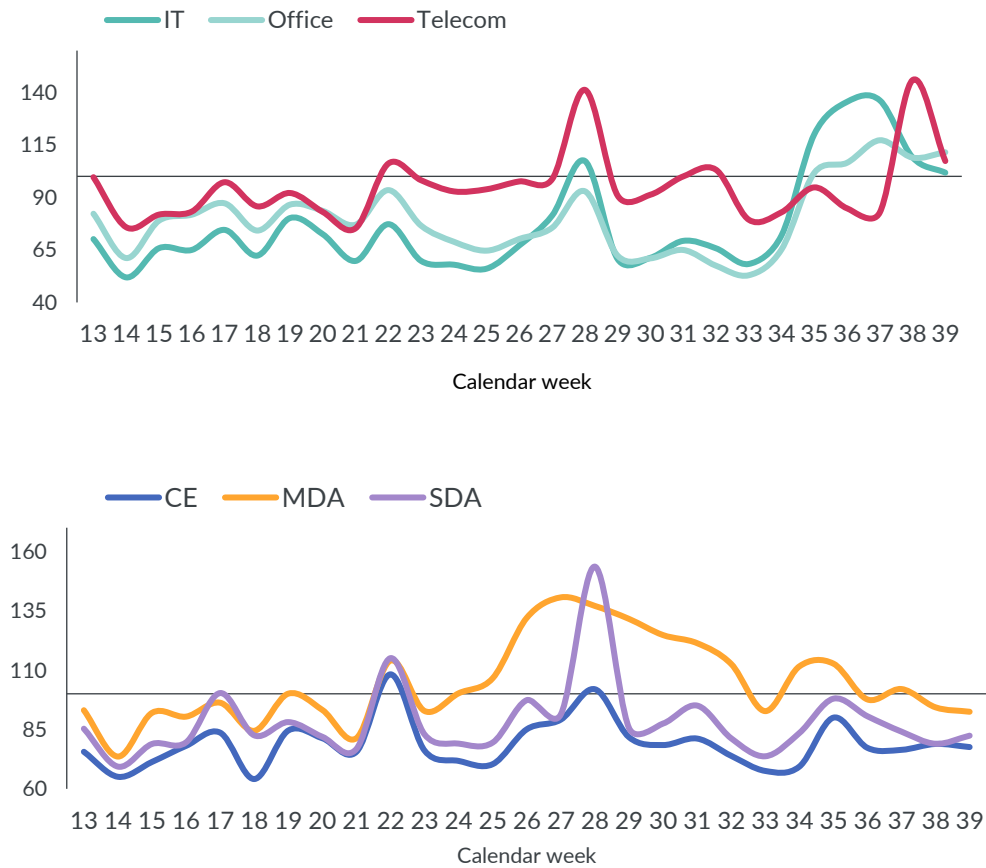
**> Spain**

Japan

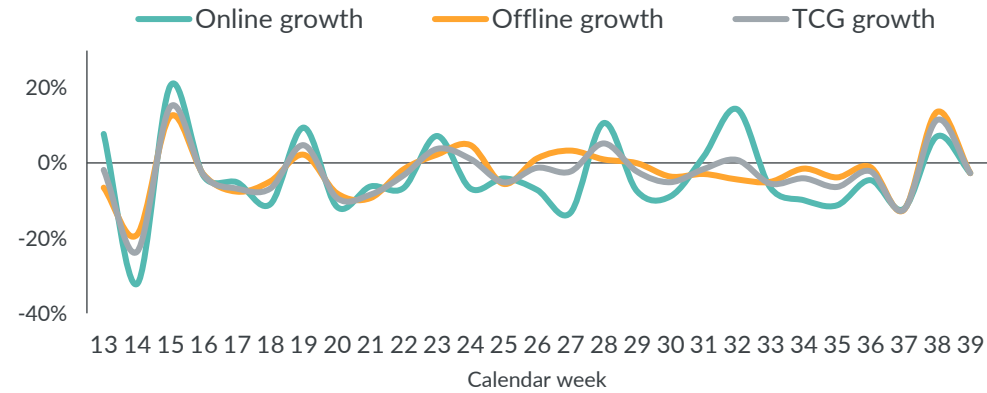
Brazil

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 39 (Sep 25 - Oct 01)



- At an identical rate of -3%, both traditional retail and online sales dragged the total TCG market down by -3%.
- While media tablets at +9% were the driver of the IT/Office categories, desk computing slumped at -27%. Smartphones accelerated at +16%.
- Except for shavers at +1%, all other MDA/SDA/CE products experienced deceleration, led by TVs at -15%. Washing machines were flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 39 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 Japan



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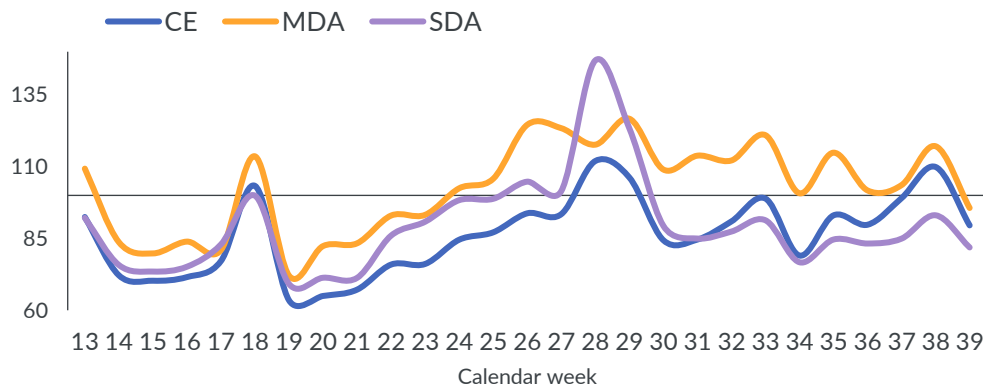
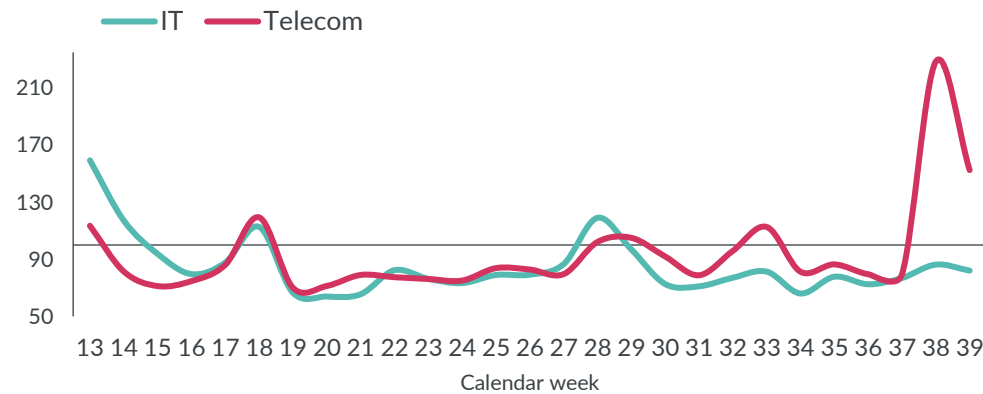
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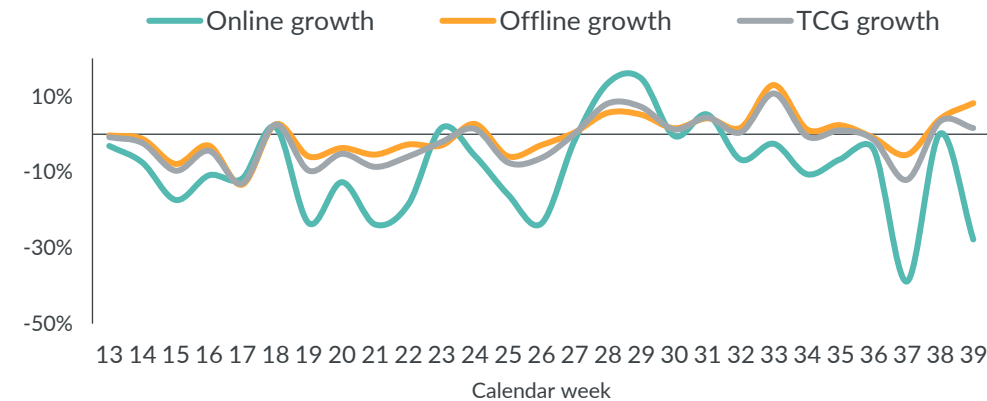
Brazil

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 39 (Sep 25 - Oct 01)



- Online sales experienced a strong drop of -28% in week 39 while in week 38 it was flat. Traditional retail at +8% was able to balance out and this resulted in a slight plus of 2% for the total TCG market.
- The catalyst of this development was smartphones at +34% while headsets were down 17%. Mobile computing and media tablets decelerated at -5% and -7% respectively.
- Mostly negative trends for MDA/SDA/CE products saw dental care in the lead at +12%. Audio home systems at -29% and air treatment at -22% marked the other end of the scale. TV sales delivered -7%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 39 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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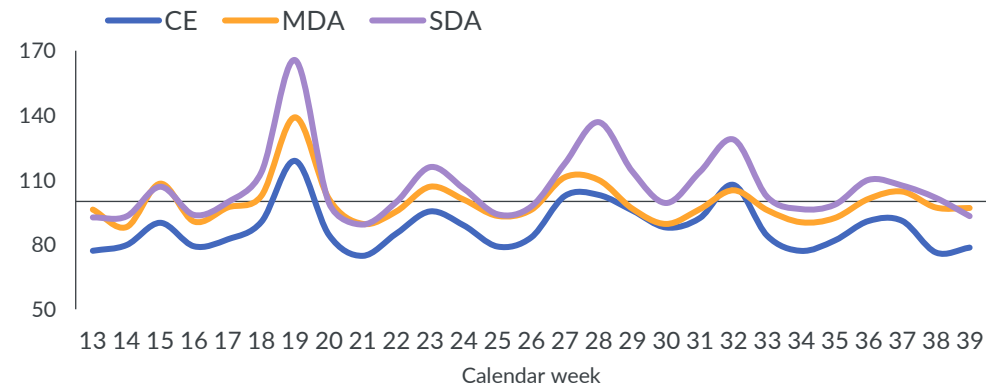
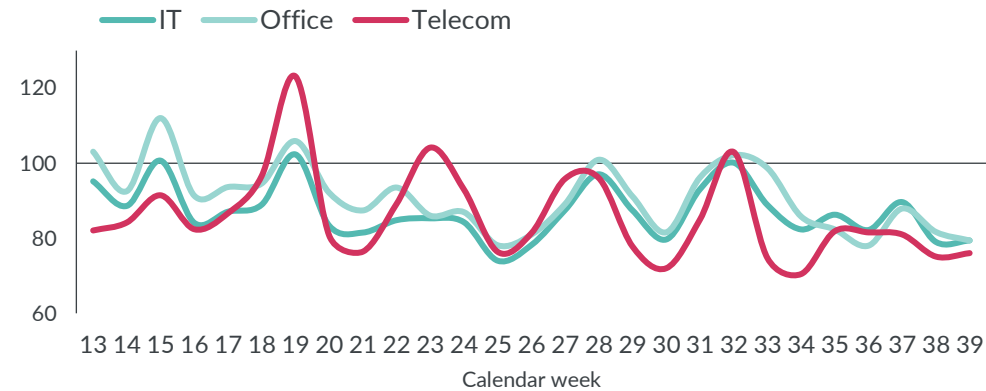
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Japan

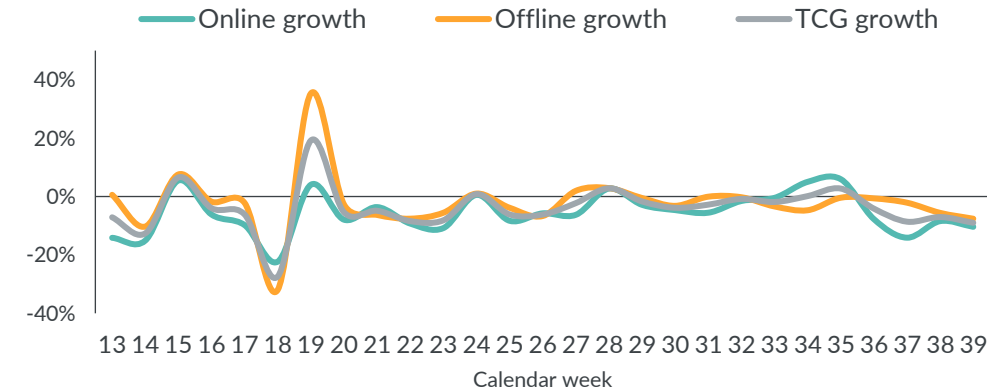
➤ Brazil

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 39 (Sep 25 - Oct 01)



- Close rates of -8% for traditional retail and -10% for online sales dragged the total TCG market down by 9%.
- Media tablets at +25% were the best-performing category in week 39, while all other IT/Office categories posted negative trends, with laser printers delivering -23%. Smartphones lagged at -12%.
- The mixed picture for MDA and SDA product groups saw cooling in the lead at +29% and shavers at -13% at the other end of the scale. CE categories were hit strongly, with TV sales decelerating at -22% and audio home systems losing 41%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 39 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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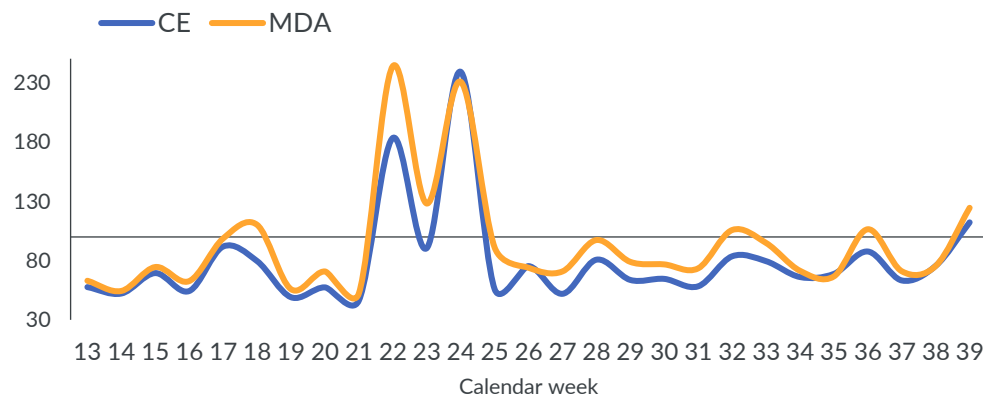
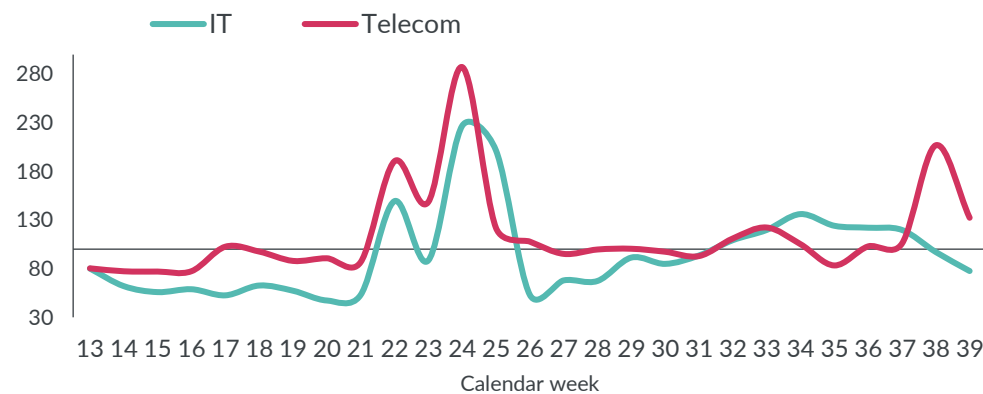
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Japan

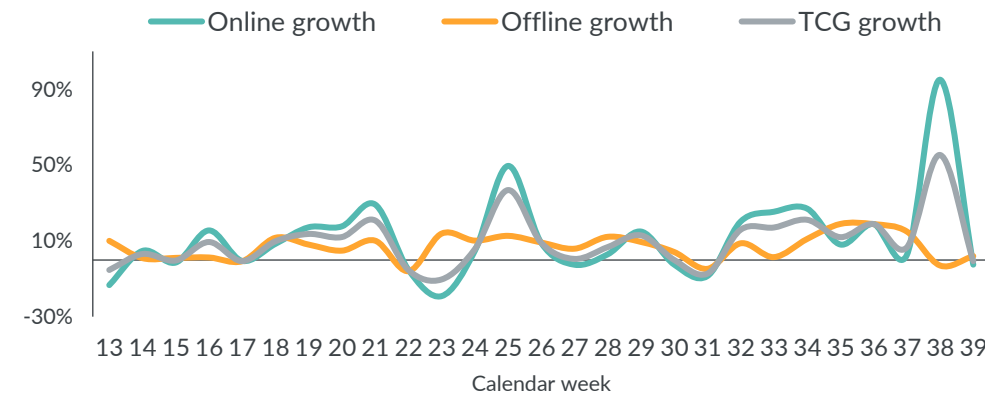
Brazil

➤ 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 39 (Sep 25 - Oct 01)



- Traditional retail experienced a plus of 2% vs week 39 in 2022, but this failed to compensate for the losses of online sales (-3%) and left the total TCG at a slight minus of 1%.
- Mobile computing was the driving force of this development, falling at -29%. Smartphones delivered a plus of 10%.
- Week 39 in 2023 saw decreases for washing machines (-14%), cooling (-10%), and TVs (-23%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 39 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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