



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 179
cw43/2023

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> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

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.

gfknewron builds a single point of truth for business-critical data that's easily accessible, and understandable, by your team. In today's fast-moving, highly competitive landscape, this is crucial to working at speed and turning market disruptions into profitability.

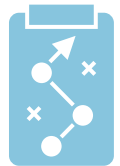
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Consumer sentiment is polarizing



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GfK Consumer Life Survey 2022, Global including North America

> Fact of the week

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85%

Of global consumers have attempted at least one of four money-saving initiatives in the past year

48%

Of consumers postponed a purchase until the product was on sale/special offer

35%

Of consumers switched from named brands to less expensive brands

While most consumers are doing something to save money, there is a willingness to spend for clear benefits.

42%

"I am prepared to pay more for products that make my life easier"

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

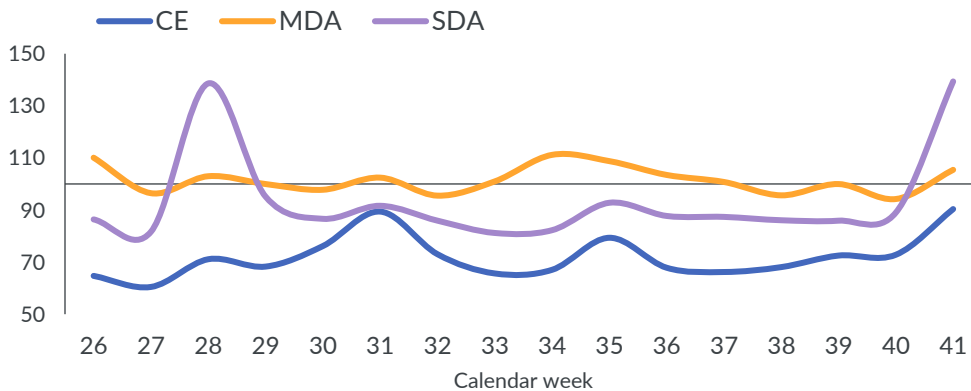
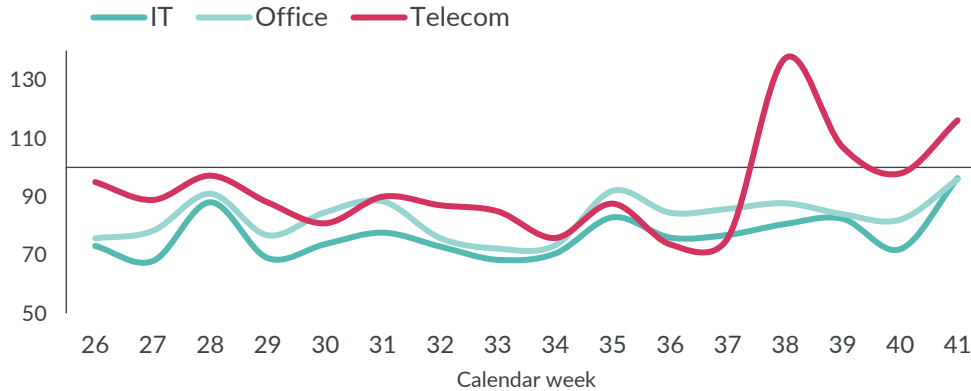
Spain

Japan

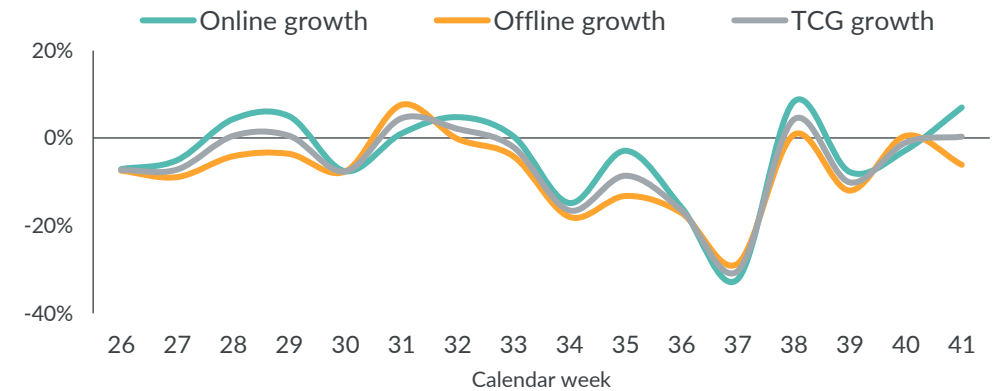
Brazil

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 41 (Oct 09 – Oct 15)



- Online sales at +7% and traditional retail at -6% delivered opposite results to each other, resulting in a flat total TCG market.
- Except for monitors which were flat, all other IT/Office products posted negative trends of between -9% for inkjet and laser printers and -22% for desk computing. Smartphones were nearly flat at -0.8%.
- While CE products experienced negative trends throughout (with TVs posting -7% and soundbars dropping by 22%), air treatment (+53%) was the best-performing product group within MDA/SDA products. Dental care delivered +46%. Food preparation declined by 11%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 41 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



About **gfknewron**

Fact of the week

Germany

➤ Great Britain

France

Italy

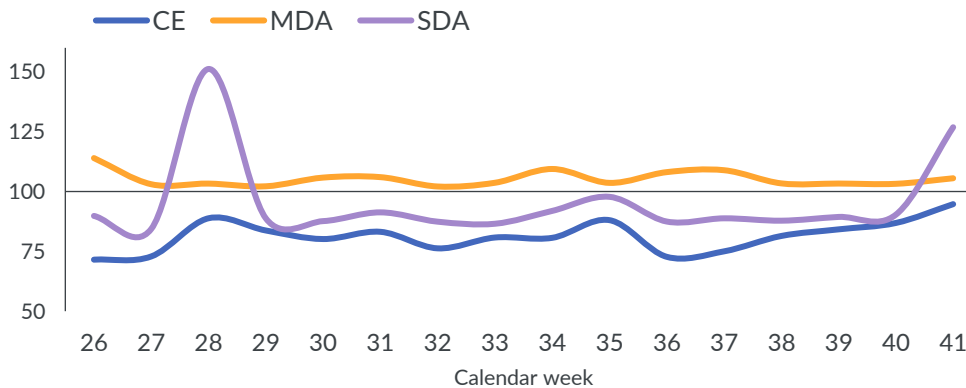
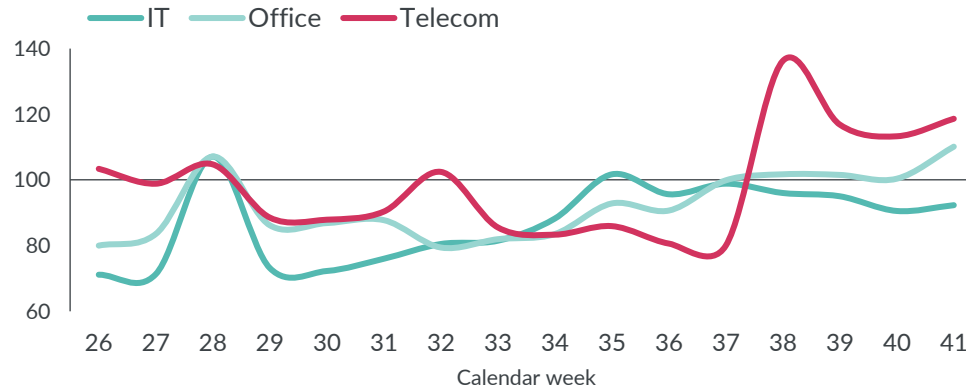
Spain

Japan

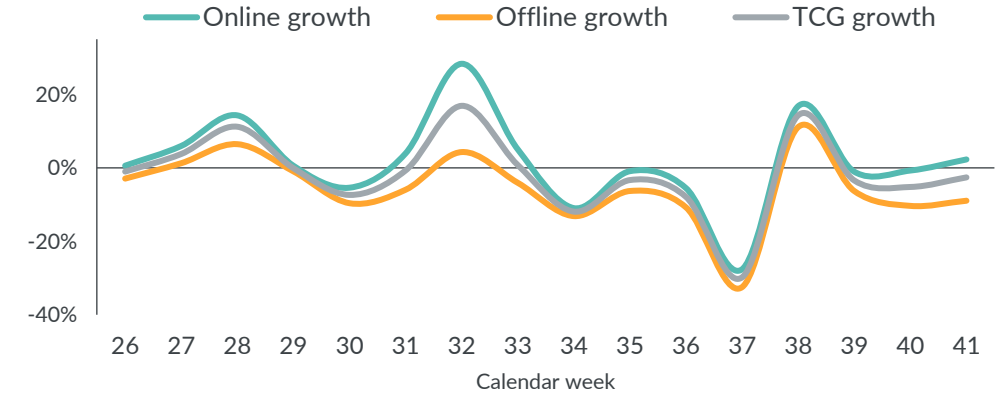
Brazil

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 41 (Oct 09 - Oct 15)



- Traditional retail delivered -9%, but online sales at a weak +2% failed to convert the total TCG market to positive growth, leaving it at -3%.
- The main driver of this development was media tablets (-28%). The picture for the rest of IT/Office was mixed, ranging from -17% for desk computing to +10% for keyboards. Smartphone sales lagged at -2%.
- Audio home systems at -24% added to the weak result of TCG, along with PTV at -4%. Within MDA/SDA categories, only dental care (+22%) delivered considerable growth, all others remained below +10%. Hot beverages were down 5%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 41 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

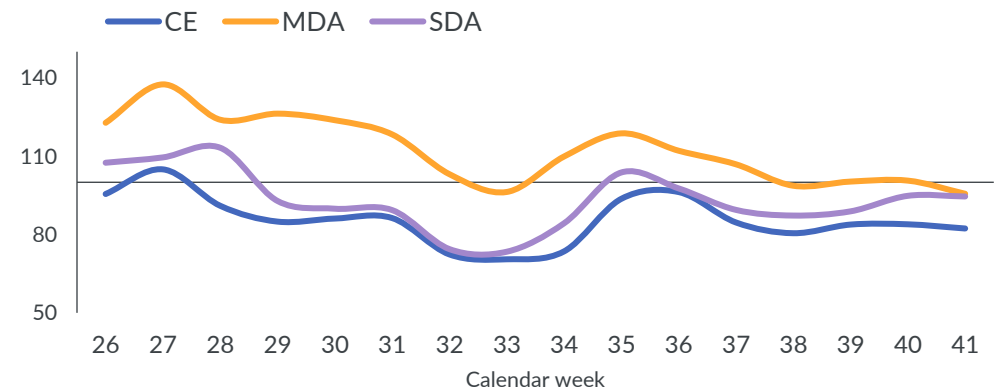
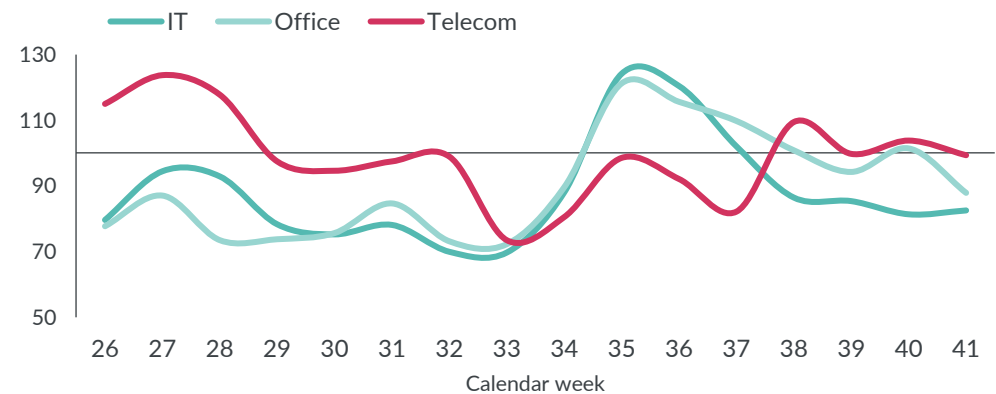
Spain

Japan

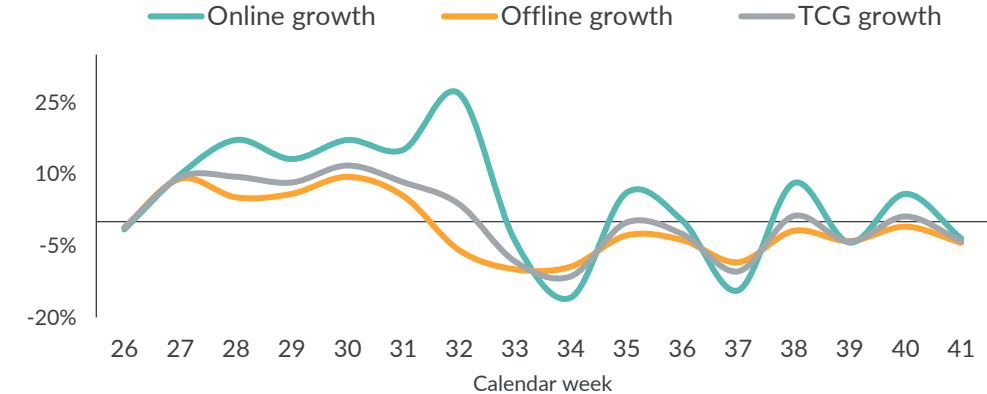
Brazil

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 41 (Oct 09 - Oct 15)



- At an identical rate of -4%, both traditional retail and online sales dragged the total TCG market down by -4%.
- IT/Office products delivered negative trends throughout, ranging from -2% for mice to -27% for desk computing. Smartphones experienced a slight uplift of 1%.
- Air treatment was the ray of light, posting +29%, and food preparation marked the other end of the scale at -20%. Both MDA categories – cooling and washing machines – were flat. CE categories were double-digit negative with TV sales posting -12% and audio home systems down by 23%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 41 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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Fact of the week

Germany

Great Britain

France



Italy

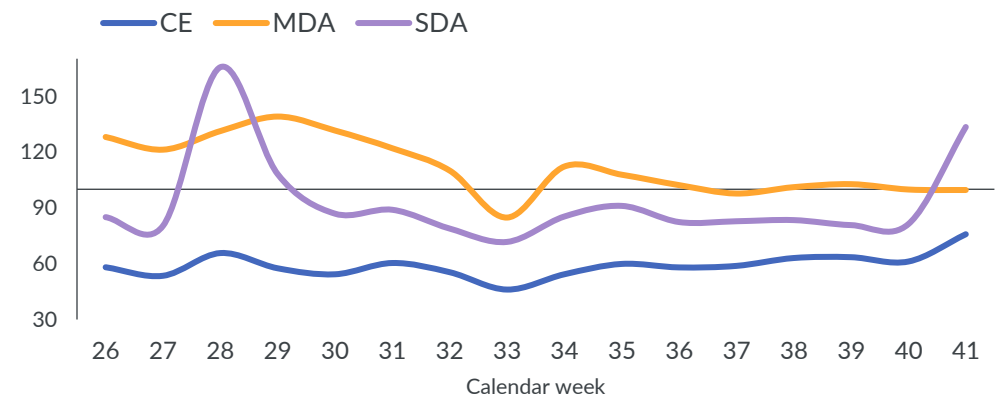
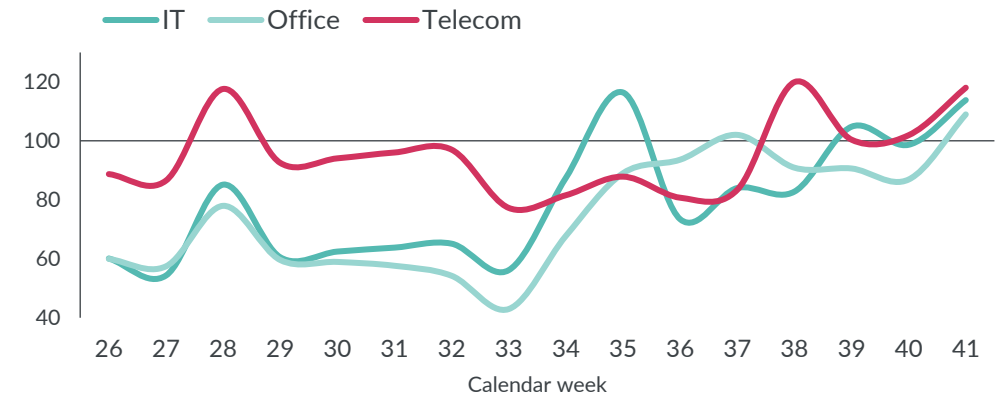
Spain

Japan

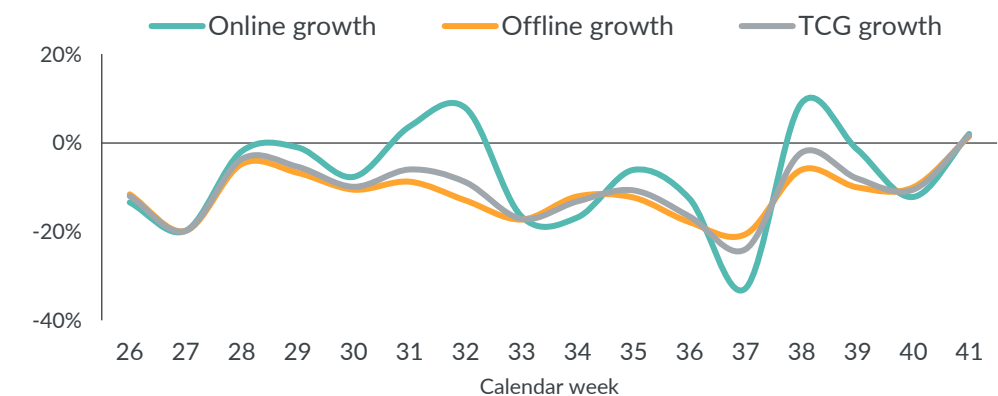
Brazil

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 41 (Oct 09 - Oct 15)



- Similar rates of +1% for traditional retail and +2% for online sales lifted the total TCG market by 2%.
- Laser printers and media tablets accelerated at +13% and +6% respectively. The other IT/Office products posted negative trends, led by desk computing at -18%. Smartphones gained 15%
- Air treatment was the best-performing category within MDA/SDA, at a remarkable +69%. While dental care won 18% and hot beverage makers delivered +11%, the other categories posted slight ups and downs. CE products declined throughout with TVs recording -16%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 41 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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Fact of the week

Germany

Great Britain

France

Italy

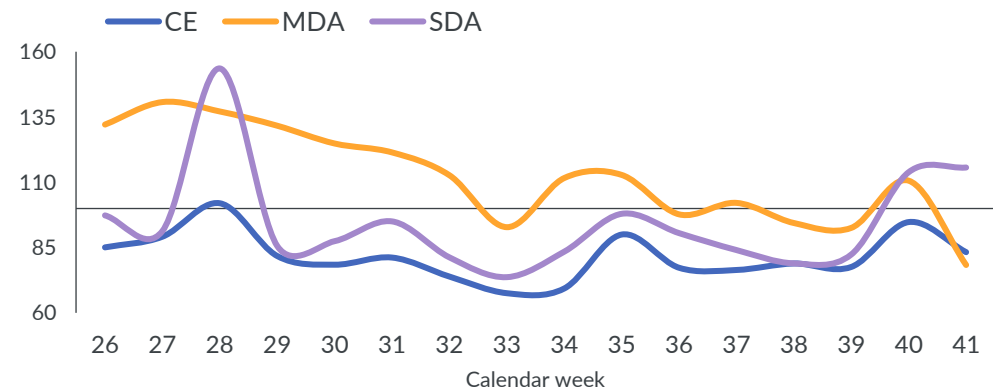
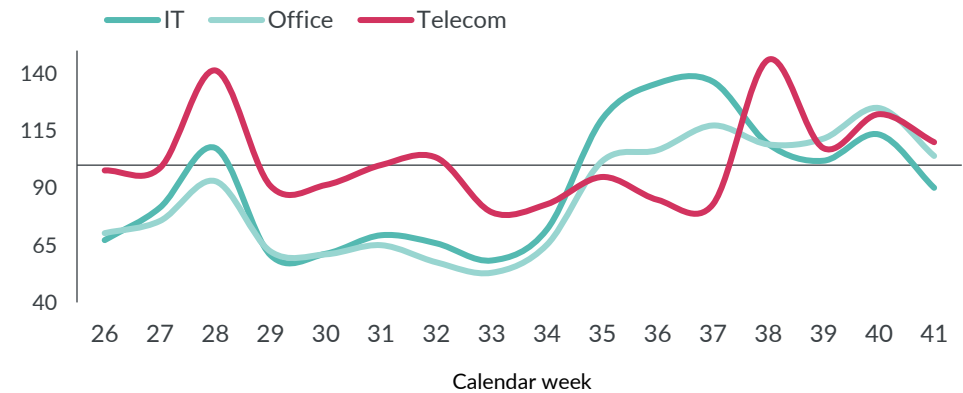
> Spain

Japan

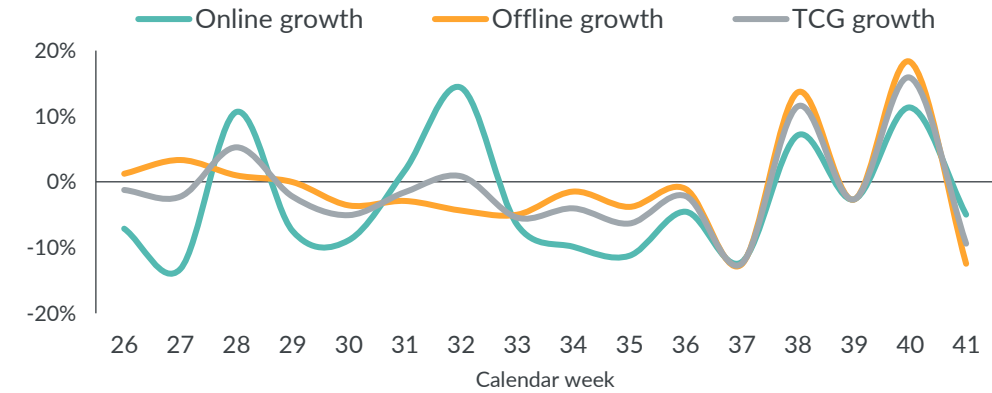
Brazil

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 41 (Oct 09 - Oct 15)



- Traditional retail delivered -12%. Combined with weak online sales at -5% this resulted in a downward trend of -9% for the total TCG market.
- All IT/Office categories decelerated in double digits with desk computing out in front at -35%. Inkjet printers at -10% were hit least. Smartphones experienced a slight uptick of 2%.
- CE products were hit strongly, all delivering double-digit negative rates, with audio home systems in the lead at -30%. Cooling and washing machines were negative as well, at -14% and -15% respectively. Hot beverage makers gained 12%. Vacuum cleaners were flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 41 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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Fact of the week

Germany

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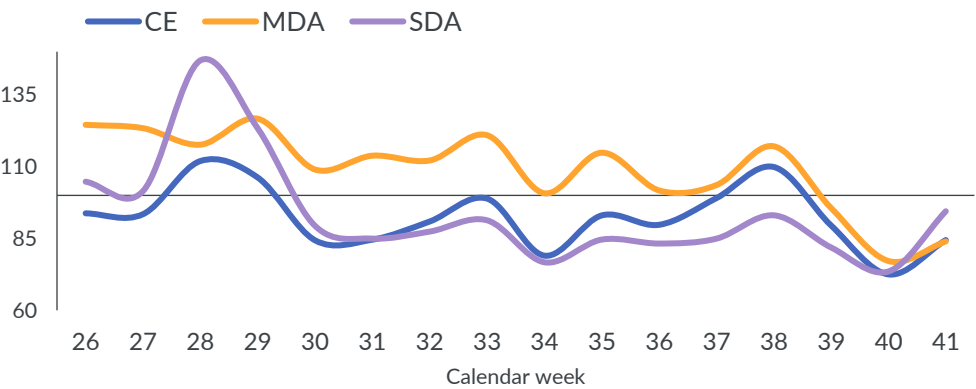
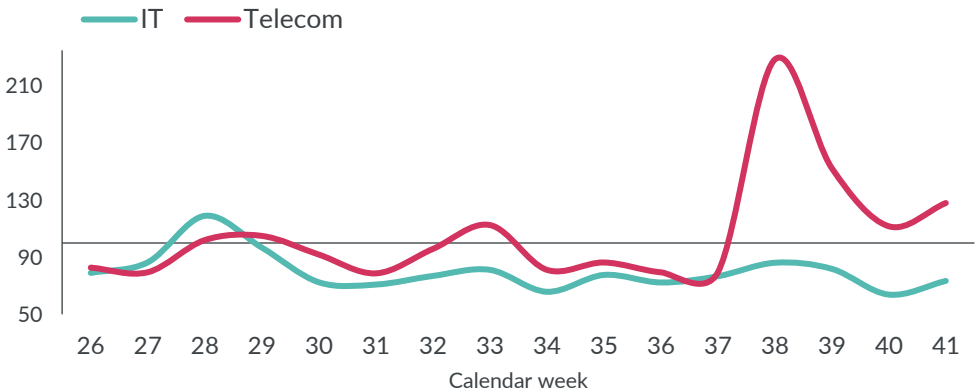
Spain

> Japan

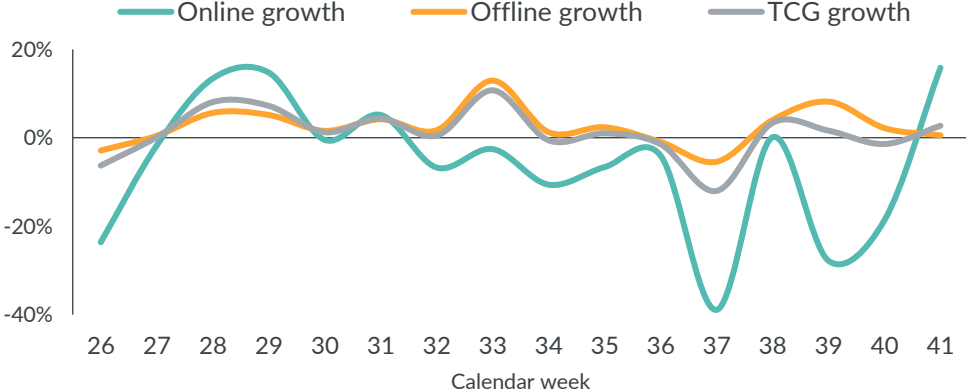
Brazil

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 41 (Oct 09 - Oct 15)



- Online sales delivered +16%. Combined with weak traditional retail at +1% this resulted in an uptick of 3% for the total TCG market.
- While mobile computing decelerated at -11%, media tablets gained 25%. Smartphones delivered +21%. Headsets were weaker at +9%.
- Mixed trends for MDA/SDA/CE products saw hot beverage makers in the lead at +31%, soundbars at +27%, and shavers at +26%. Audio home systems at -16% and air treatment at -12% marked the other end of the scale. TV sales delivered -5%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 41 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**

Fact of the week

Germany

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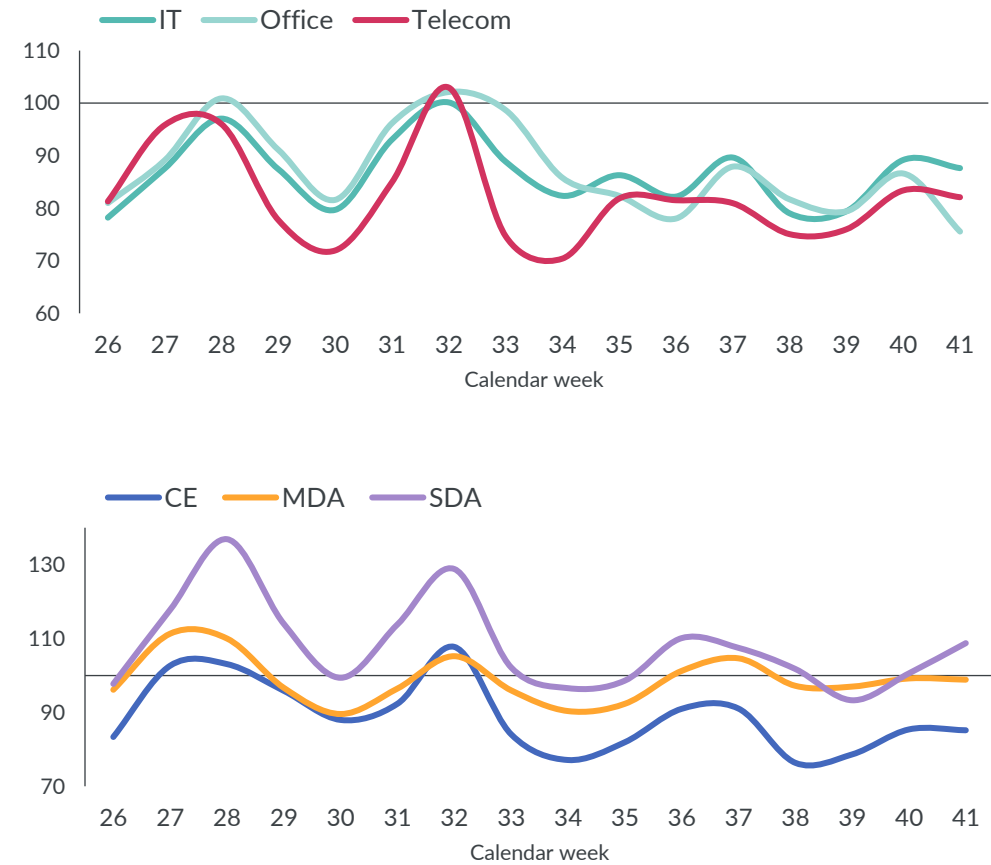
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Japan

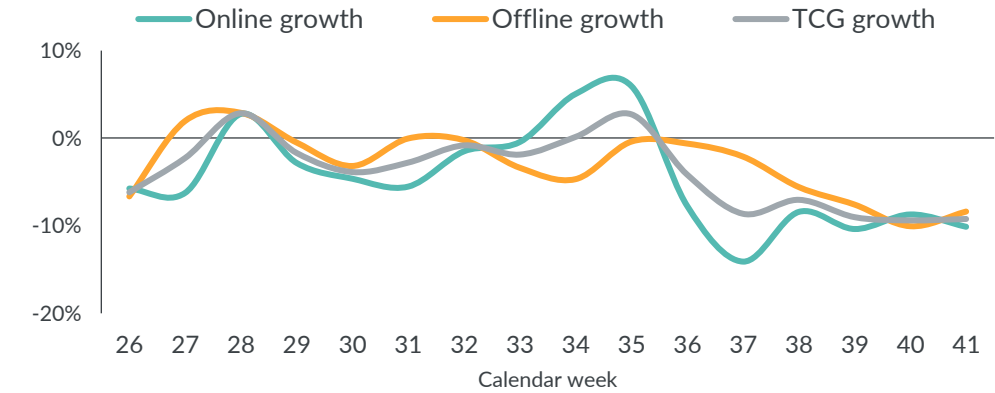
> Brazil

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 41 (Oct 09 - Oct 15)



- Close rates of -8% for traditional retail and -10% for online sales dragged the total TCG market down by 9%.
- Media tablets at +19% were the best-performing category in week 41. Laser printers delivered +8%, while all other IT/Office categories posted negative trends, with inkjet printers at -12%. Smartphones lagged at -14%.
- The mixed picture for MDA and SDA product groups saw hot beverage makers in the lead at +20% and shavers at -5% at the other end of the scale. CE categories were hit strongly, with TV sales decelerating at -20%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 41 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

Germany

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Japan

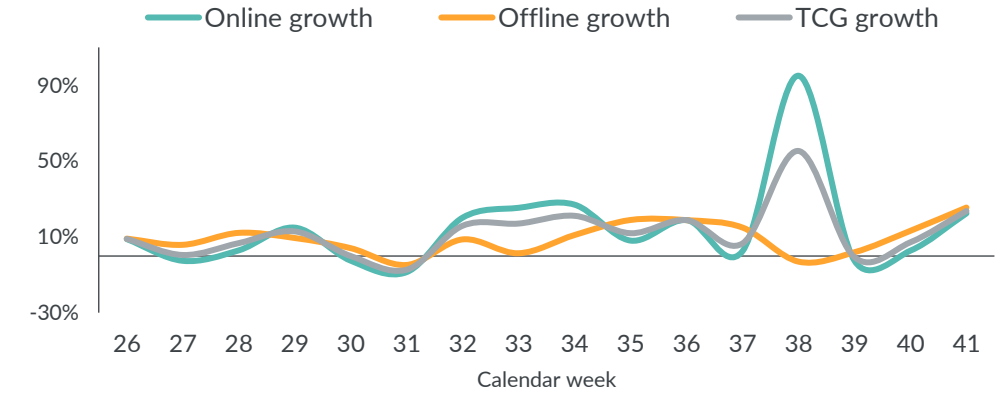
Brazil

➤ 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 41 (Oct 09 - Oct 15)



- Good results for both online sales (+22% in week 41 versus +3% in week 40) and traditional retail (+26%, up from +13%) lifted the total TCG market to a solid plus of 24%.
- Smartphones were the driving force of this development, accelerating at +34%. Mobile computing delivered a plus of 4%.
- Week 41 in 2023 saw an increase of 5% for cooling. Washing machines dropped by 4%. TVs were the worst-performing product group at -17%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 41 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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