



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 180
cw44/2023

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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.

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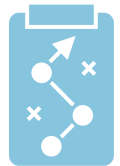
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

High revenues during COVID-19 still halo into the market.



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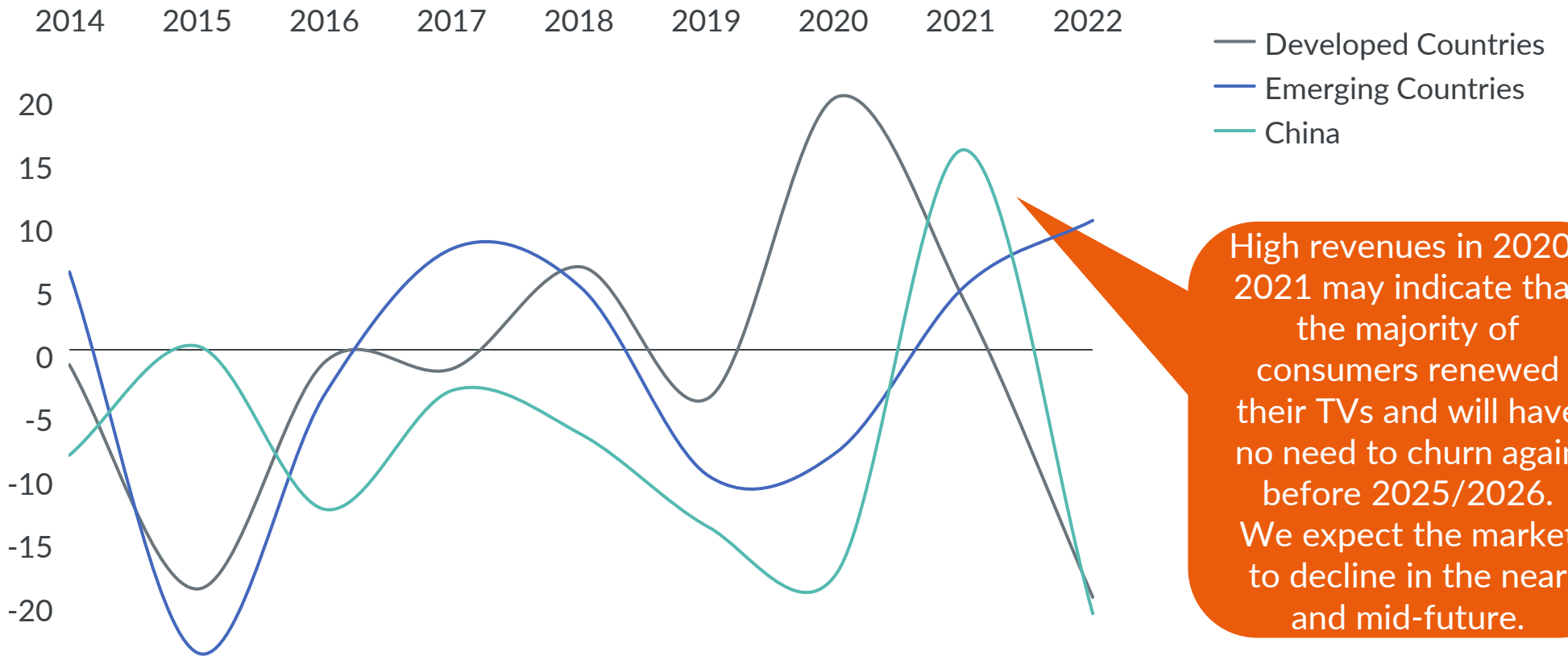
Brazil

China

Expected lifecycle ~6 years

Developed countries lifecycle disrupted by COVID purchases!

Expected churn in developed countries ~ 2026!



High revenues in 2020/2021 may indicate that the majority of consumers renewed their TVs and will have no need to churn again before 2025/2026. We expect the market to decline in the near and mid-future.

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

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France

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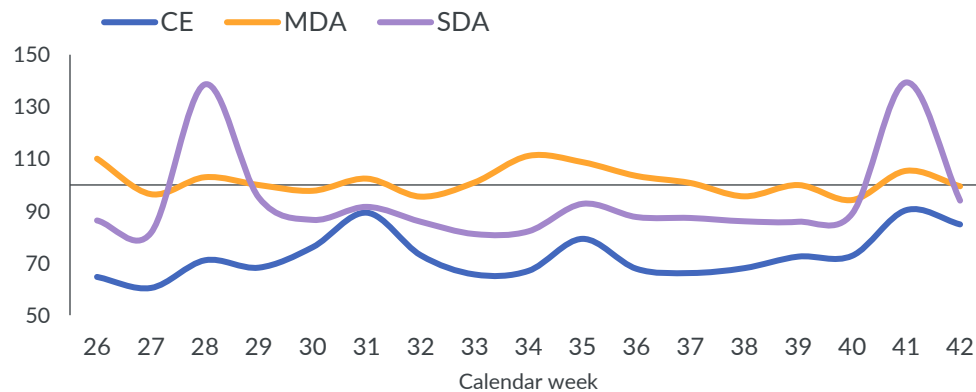
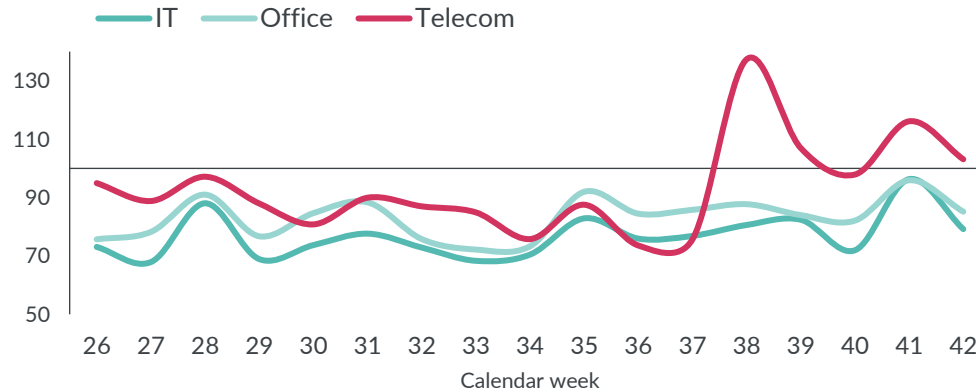
Spain

Japan

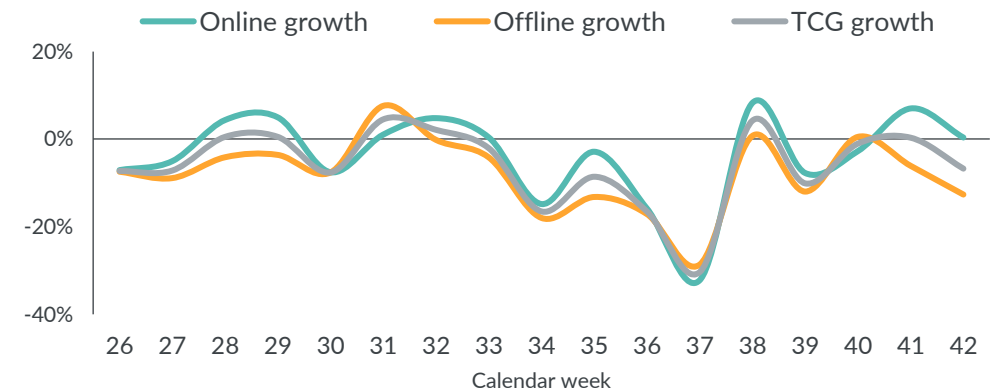
Brazil

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 42 (Oct 16 - Oct 22)



- Traditional retail delivered -13%, but flat online sales failed to convert the total TCG market to positive growth, leaving it at -7%.
- Except for monitors at +7%, all other IT/Office products posted negative double-digit trends of between -11% for inkjet printers and -21% for mobile computing. Smartphones lagged at 6%.
- While CE products experienced negative trends throughout (with TVs posting -6% and audio home systems dropping by 17%), dental care (+33%) was the best-performing category within MDA/SDA products. Air treatment delivered +23%. Food preparation declined by 11%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 - 42 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.

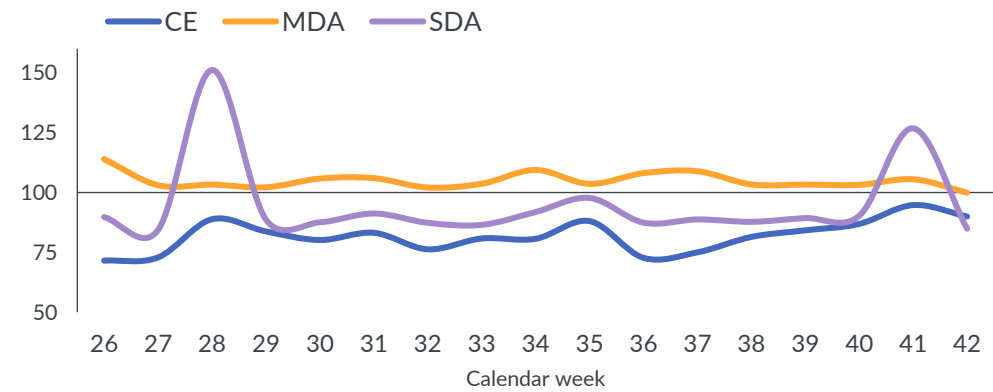
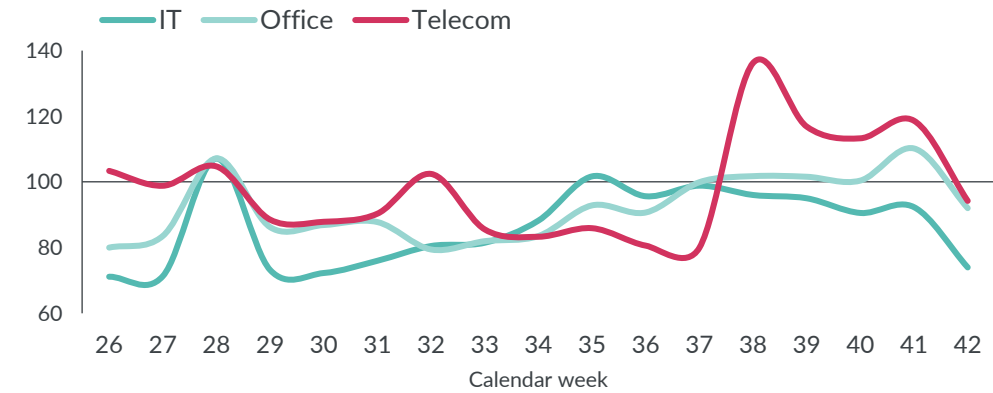
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

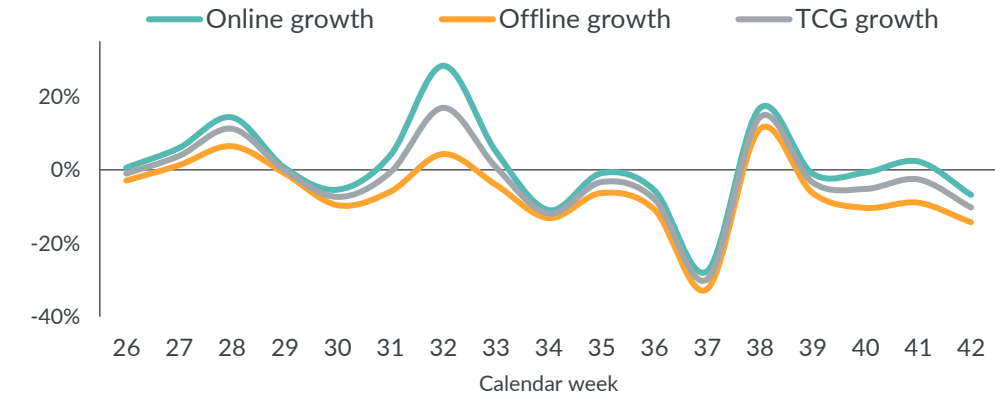


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 42 (Oct 16 - Oct 22)



- Deceleration of traditional retail (-14%) dragged the total TCG market down by -10%. Online sales added to it by delivering -7%.
- The main driver of this development was media tablets (-37%). The picture for the rest of IT/Office was mixed, ranging from -14% for desk computing to +17% for laser printers. Smartphone sales slumped at -14%.
- Audio home systems at -27% added to the weak result of TCG, along with PTV at -4%. Within MDA/SDA categories, only dental care (+15%) delivered considerable growth, all others displayed small ups and downs. Food preparation was flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 42 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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Germany

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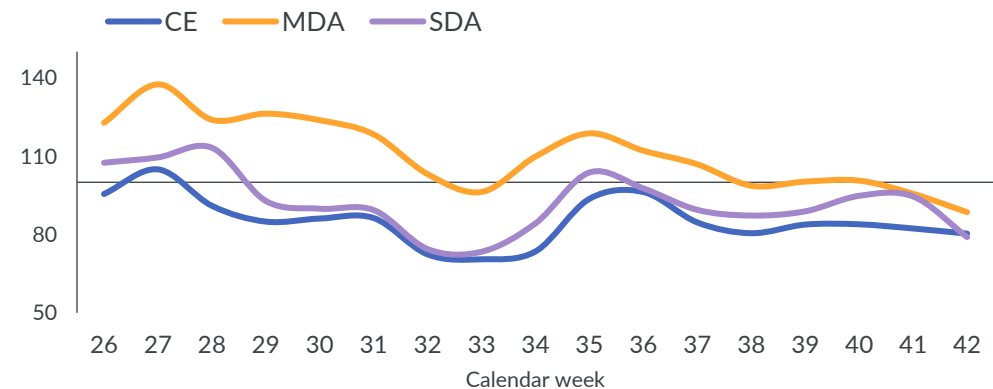
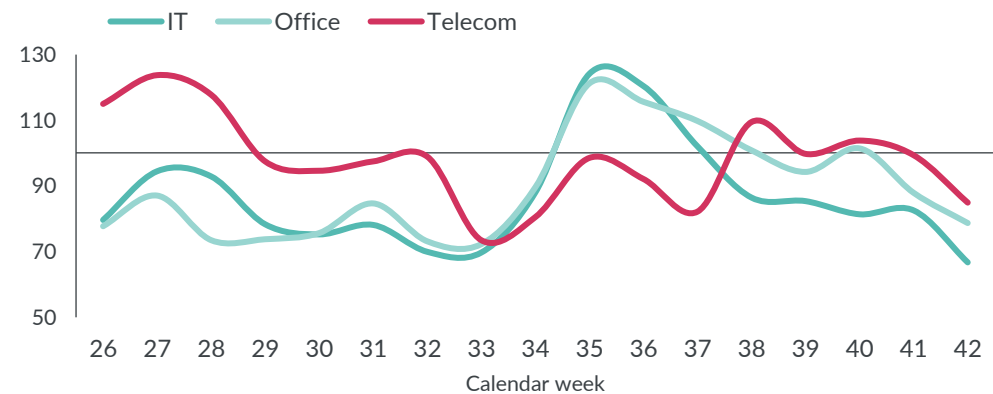
Spain

Japan

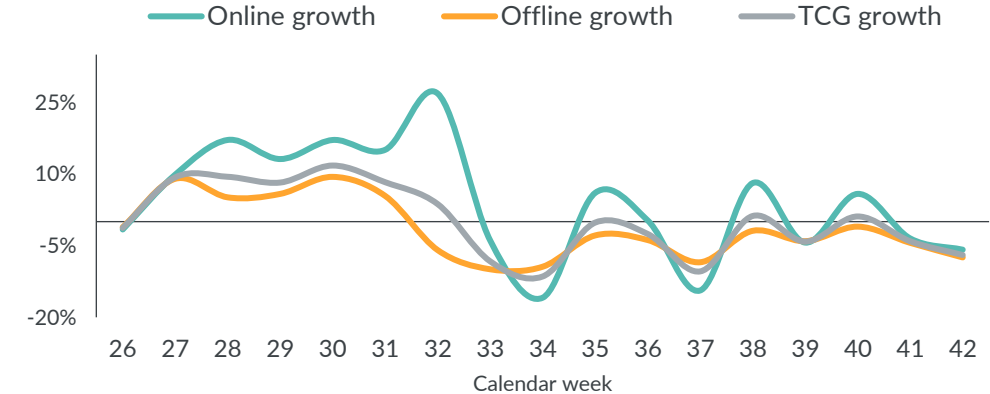
Brazil

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 42 (Oct 16 - Oct 22)



- Close rates of -7% for traditional retail and -6% for online sales dragged the total TCG market down by 7%.
- The negative rates for IT/Office products ranged from -1% for mice to -30% for desk computing. Smartphones lagged at -7%.
- The mostly negative picture for MDA and SDA product groups saw hot beverage makers in the lead at +8% and vacuum cleaners at +4%. Food preparation at -16% marked the other end of the scale. CE categories posted negative rates, too, with TV sales decelerating at -6% and audio home systems experiencing -16%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 42 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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Fact of the week

Germany

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France



Italy

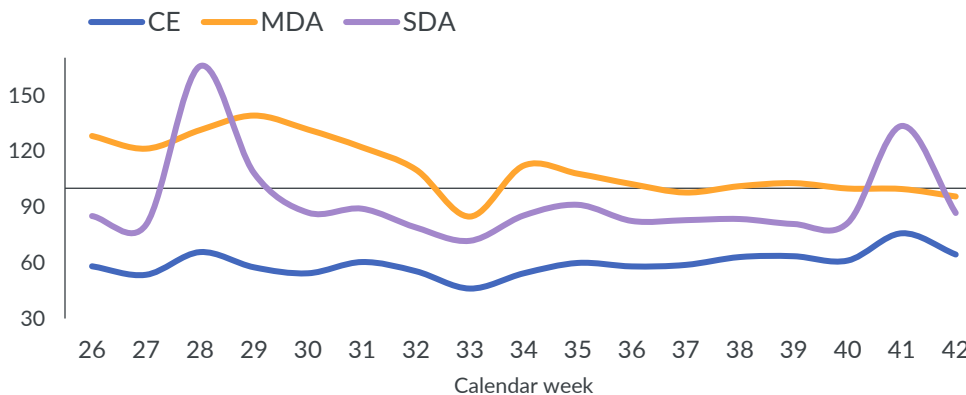
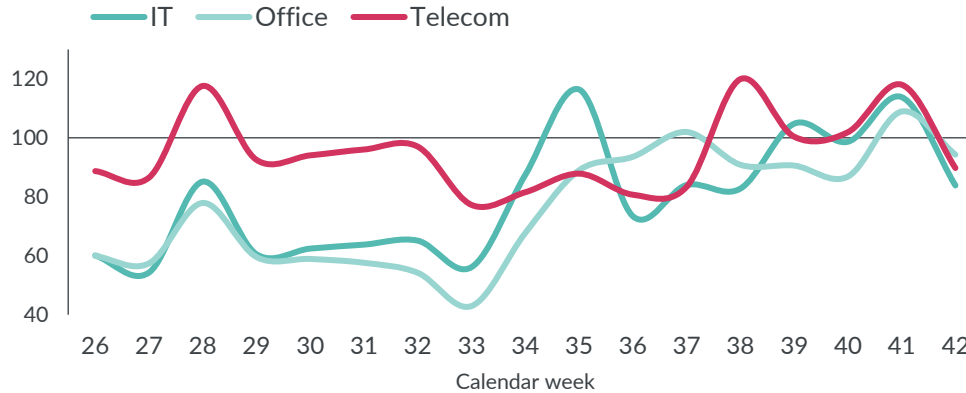
Spain

Japan

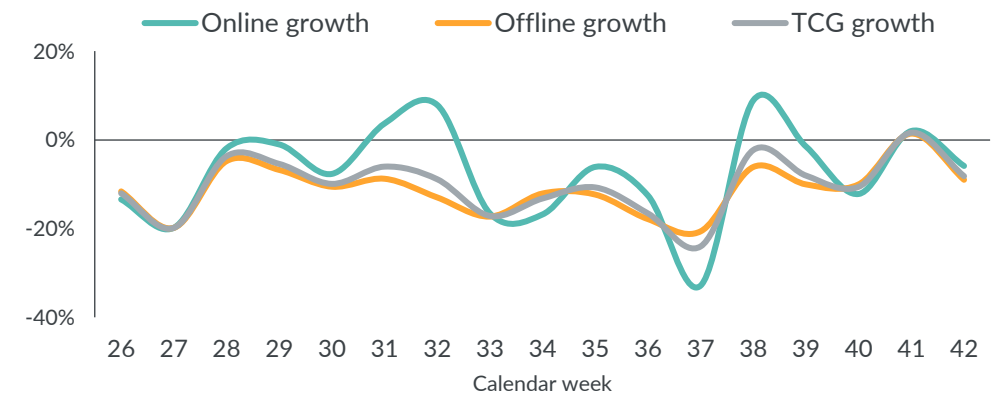
Brazil

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 42 (Oct 16 - Oct 22)



- Online sales delivered -6% (+2% the previous week) and traditional retail was down -9% (+1% the previous week). This meant a downswing for the total TCG market of 8%.
- Desk computing at -23% was the worst-performing category within IT/Office products. All others were negative, too, but media tablets were hit the least. Smartphones decelerated at -4%.
- Air treatment was the best-performing category in week 42, at +98%. The other MDA/SDA categories posted a mixed picture with hot beverage makers up 9% and shavers down by 7%. CE products lost in double digits.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 - 42 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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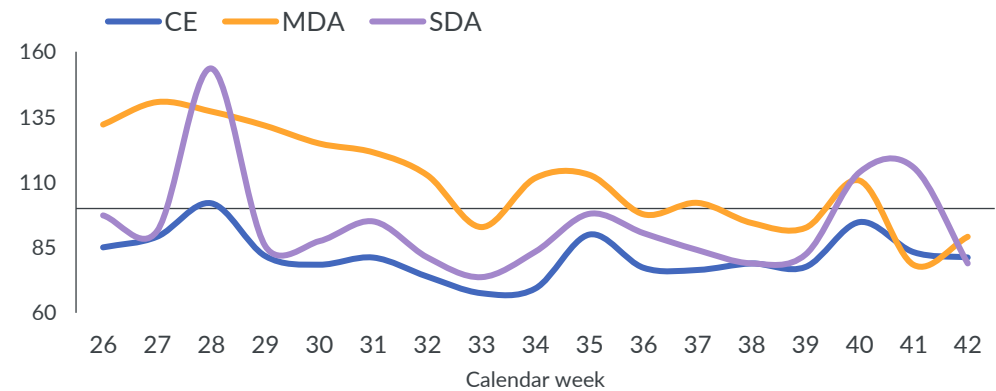
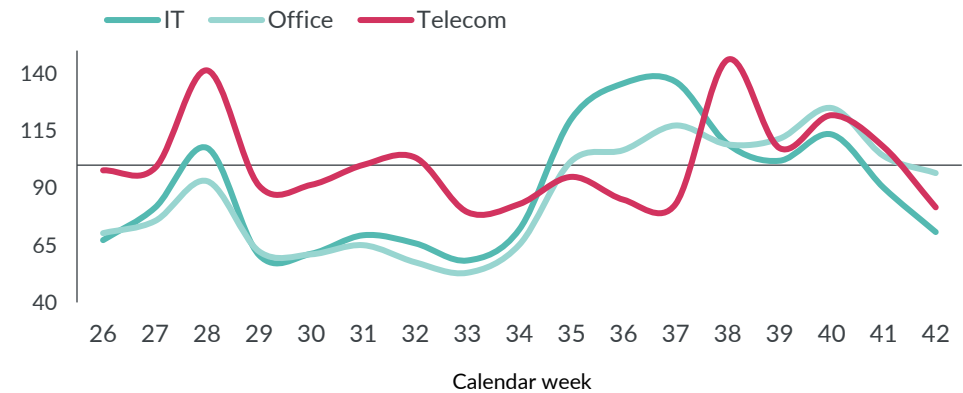
➤ Spain

Japan

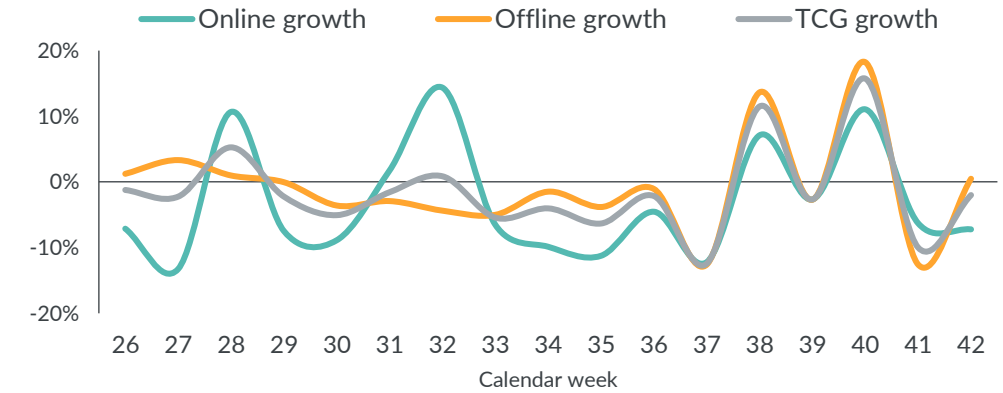
Brazil

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 42 (Oct 16 - Oct 22)



- Online sales experienced a minus of 7% versus week 42 in 2022. Flat traditional retail was not able to balance this out, resulting in a slight downswing for the total TCG market of 2%.
- While inkjet printers were stable and mobile computing was down 5%, all other IT/Office categories lost in double digits. Smartphones were nearly flat at +0.7%.
- CE products all delivered negative rates, with audio home systems in the lead at -17%. MDA/SDA categories experienced mixed rates with vacuum cleaners out in front at +6% and MDAs bringing up the rear at -1%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 42 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



About **gfknewron**

Fact of the week

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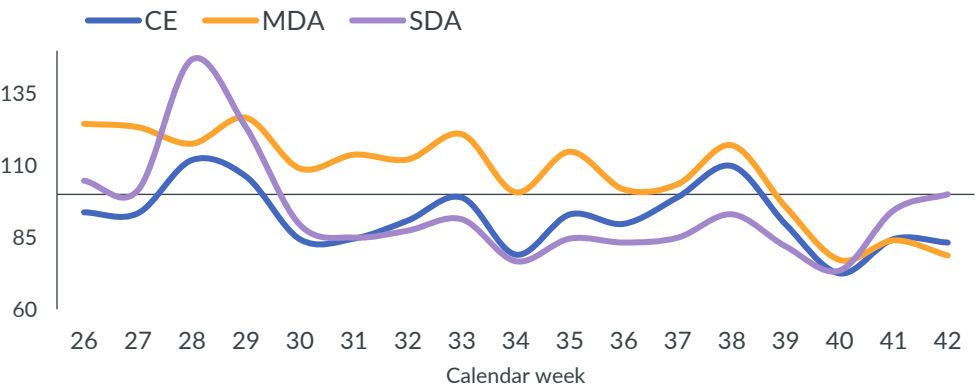
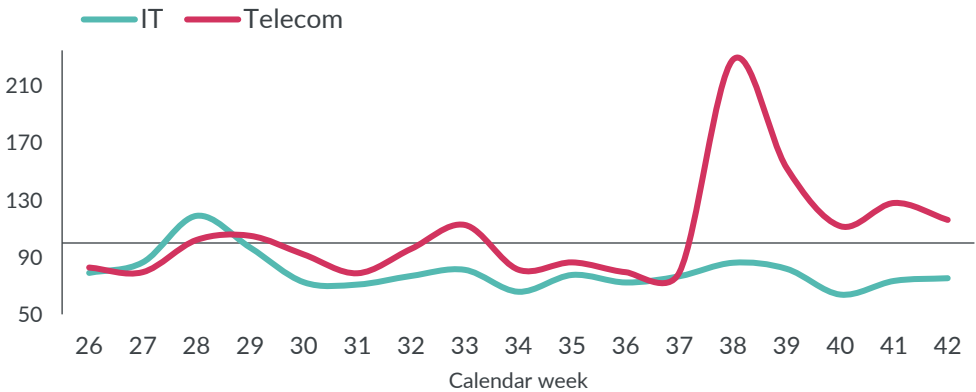
Spain

> Japan

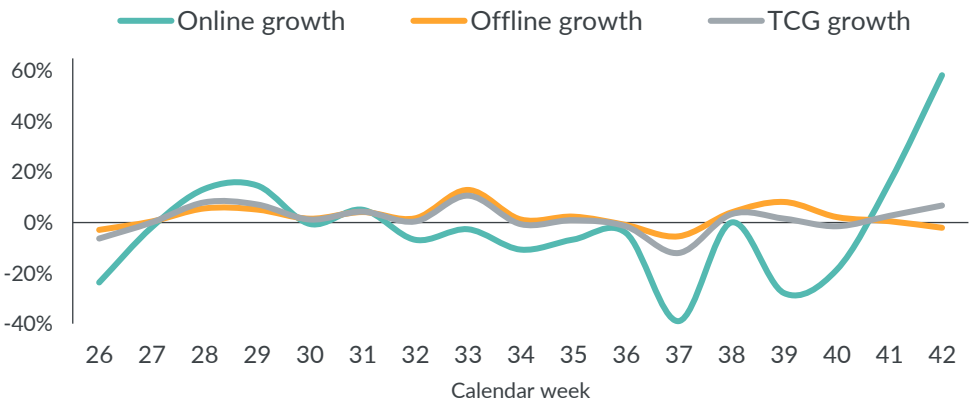
Brazil

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 42 (Oct 16 - Oct 22)



- Online sales delivered an extraordinary +58% but weak traditional retail at -2% resulted in just a slight uplift of 7% for the total TCG market. The share of online sales was less than 25% of the total market.
- The drivers of this development were all SDA categories, with hot beverage makers out in front at +69%. TVs recorded a plus of 2%. MDAs were down 4%.
- Smartphones added to the good results, delivering +14%. Headsets experienced an uplift of 31%. While mobile computing decelerated at -5%, media tablets gained 24%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 42 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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Fact of the week

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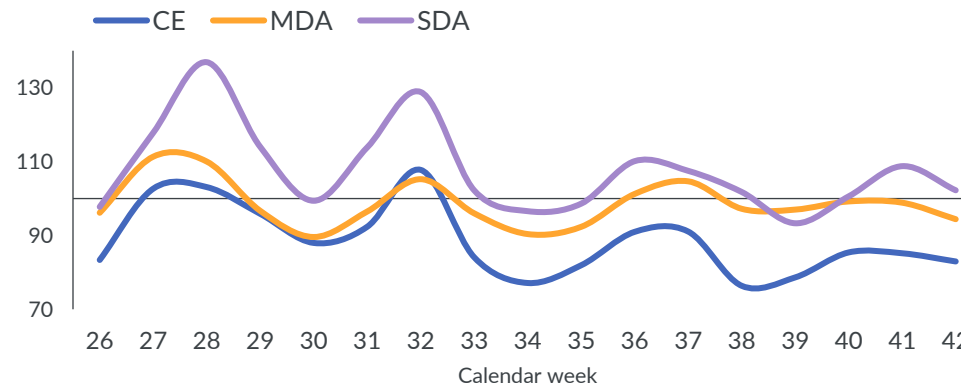
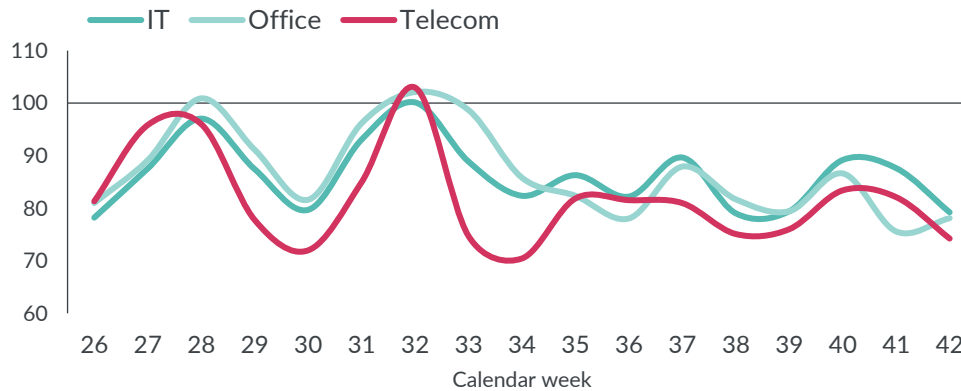
Spain

Japan

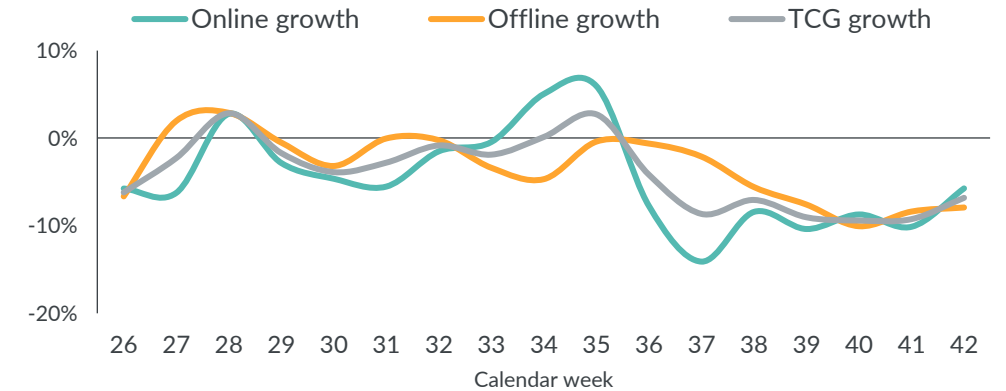
➤ Brazil

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 42 (Oct 16 - Oct 22)



- Close rates of -8% for traditional retail and -6% for online sales dragged the total TCG market down by 7%.
- Media tablets at +19% were the best-performing category in week 42, while all other IT/Office categories posted negative trends, with inkjet printers delivering -19%. Smartphones lagged at -11%.
- The overall positive picture for MDA and SDA product groups was determined by double-digit growth for hot beverage makers (+18%) and food preparation (+17%). Shavers declined by 9%. TV sales experienced -16% in week 42 and audio home systems lost 40%.

Weekly retail insights from the Point of Sale

Spotlight on China



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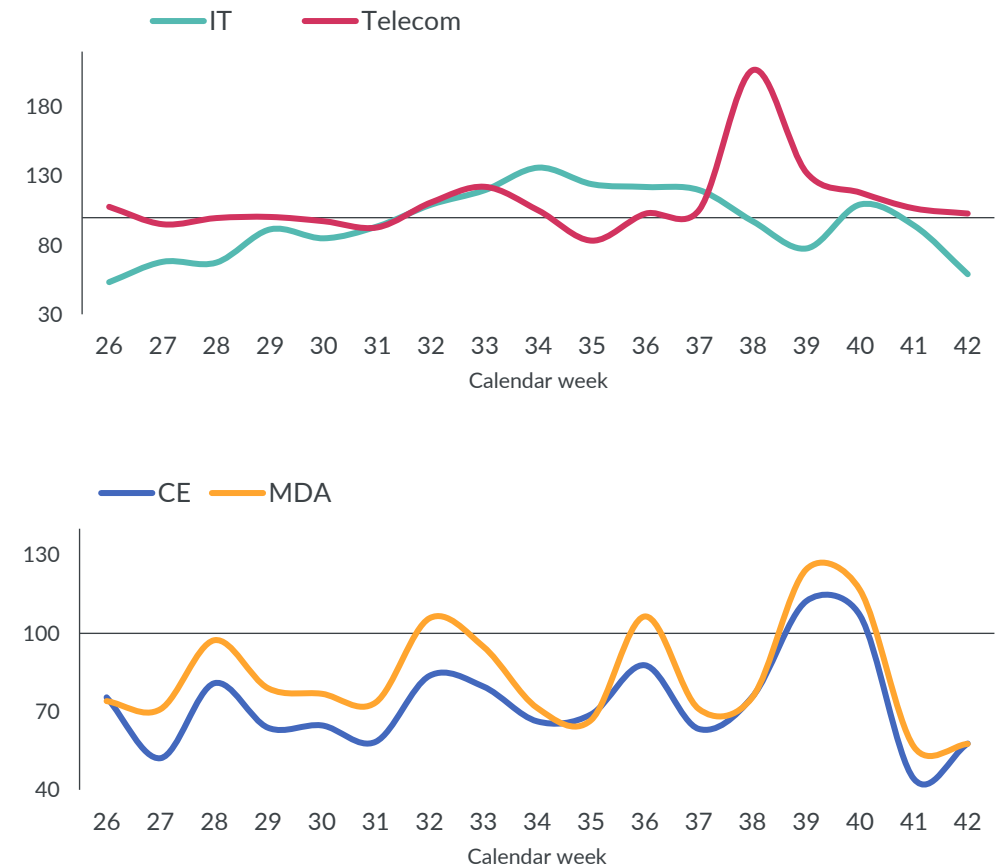
Spain

Japan

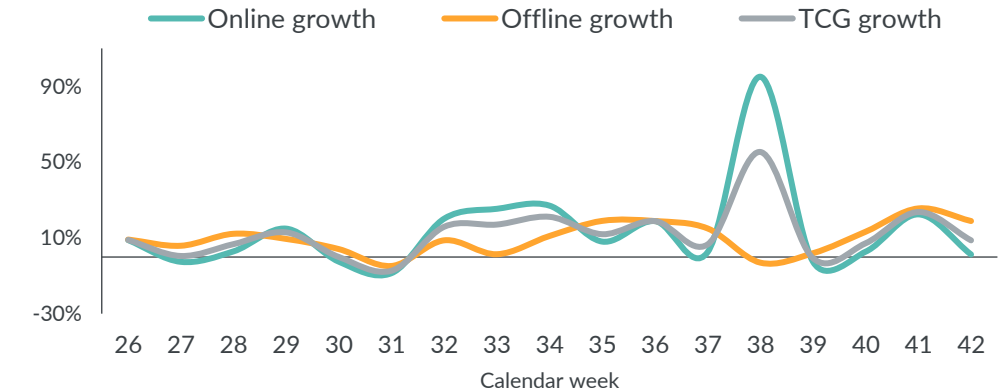
Brazil

➤ 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 42 (Oct 16 - Oct 22)



- Good results for traditional retail (up 19%) led to a plus of 9% for the total TCG market. Online sales were weak at +1%.
- Smartphones were the driving force of this development, accelerating at +23%. Mobile computing delivered a minus of 33%.
- Week 42 in 2023 saw double-digit decreases for PTV (-19%) and washing machines (-16%). Cooling at -5% was less negative.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 42 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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