



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 182
cw46/2023

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Take the effort out of analyzing data

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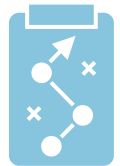
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Online retail slightly outpaces traditional retail after a long phase of recovery of traditional retailers.



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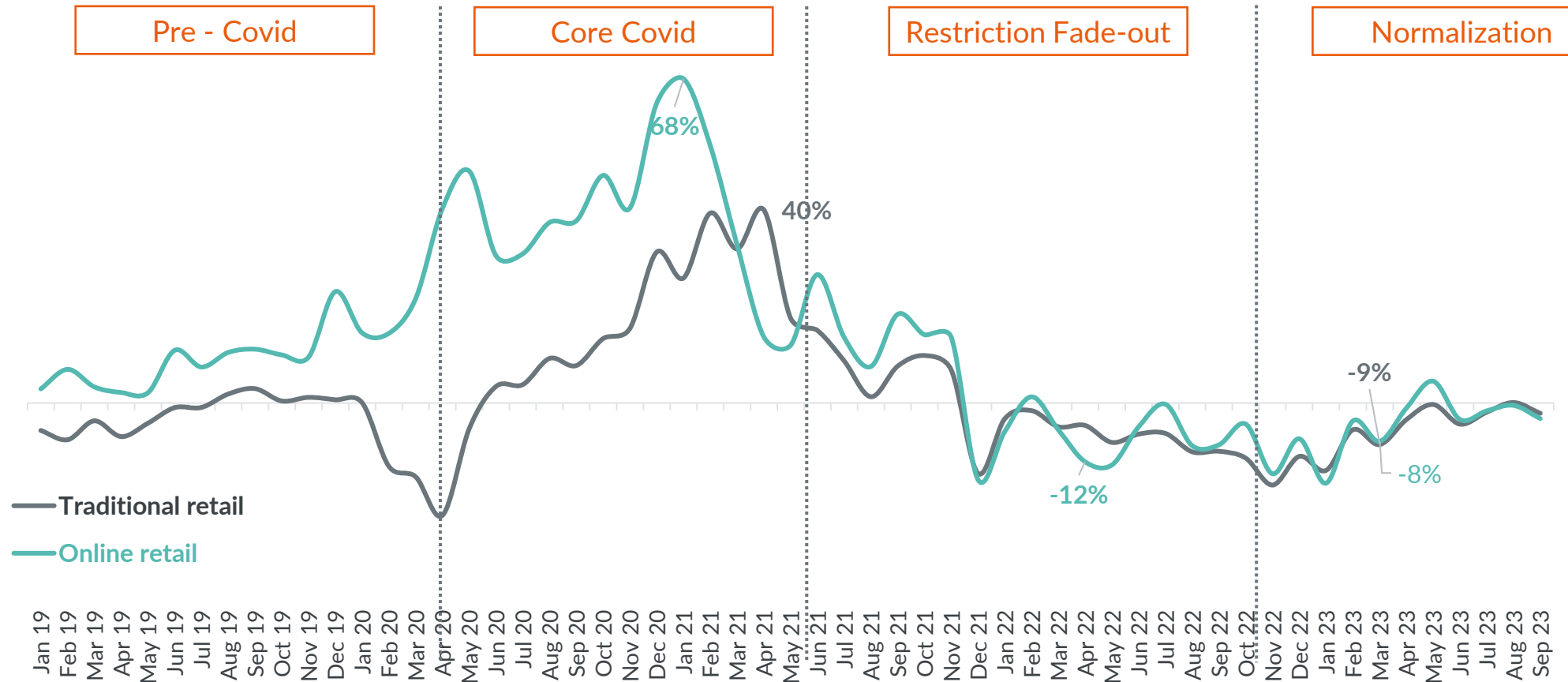
Spain

Japan

Brazil

China

GfK B2C Retailer Market | Technical Consumer Goods
Sales Value USD (NSP) in Mio. | Growth rate PY +/- %



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.

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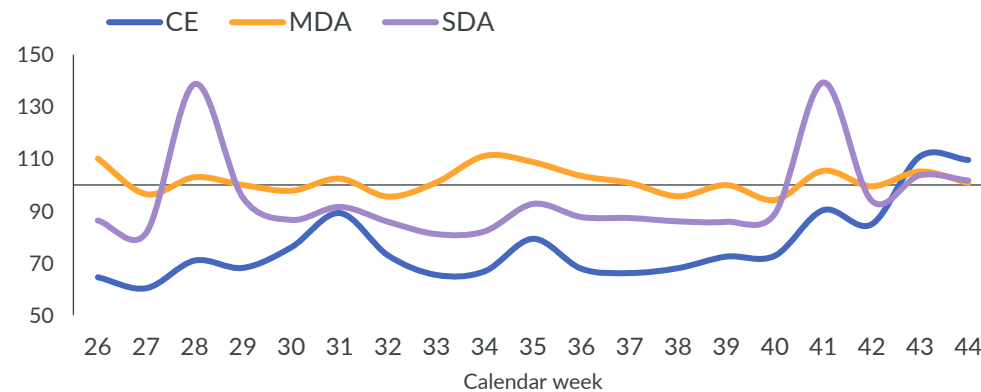
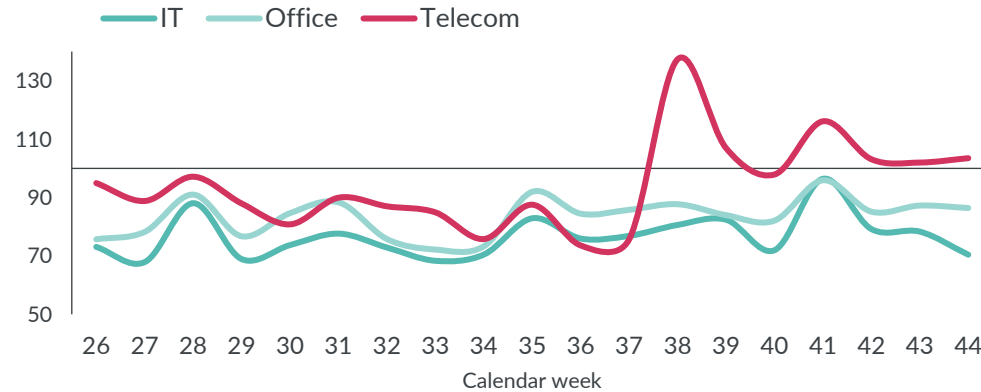
Spain

Japan

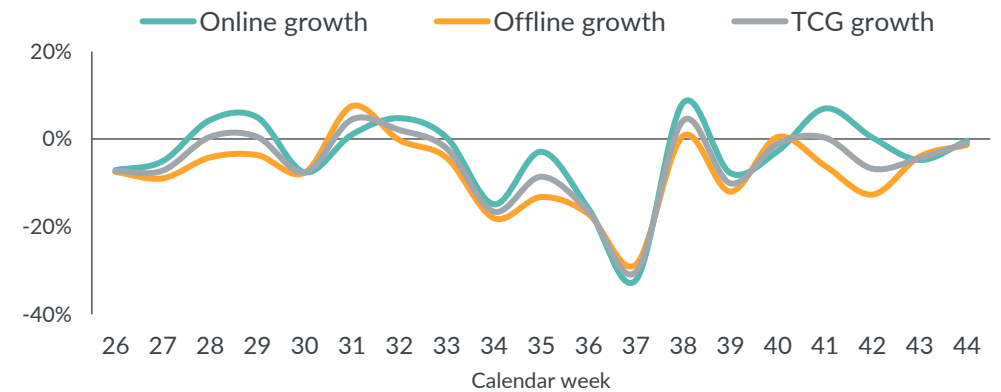
Brazil

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 44 (Oct 30 – Nov 05)



- Online sales were flat in week 44. Slightly decelerating traditional retail (-1%) left the total TCG market at a weak -1%.
- Except for laser printers at +3% and lagging monitors at -3%, all other IT/Office products posted double-digit negative trends, led by mobile computing at -30%. Smartphones increased by 11%.
- Vacuum cleaners (+14%) were the best-performing product group within MDA/SDA/CE products. Soundbars at -22% marked the other end of the scale. Washing machines and shavers were flat. TV sales slumped at -13%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 44 2023; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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.

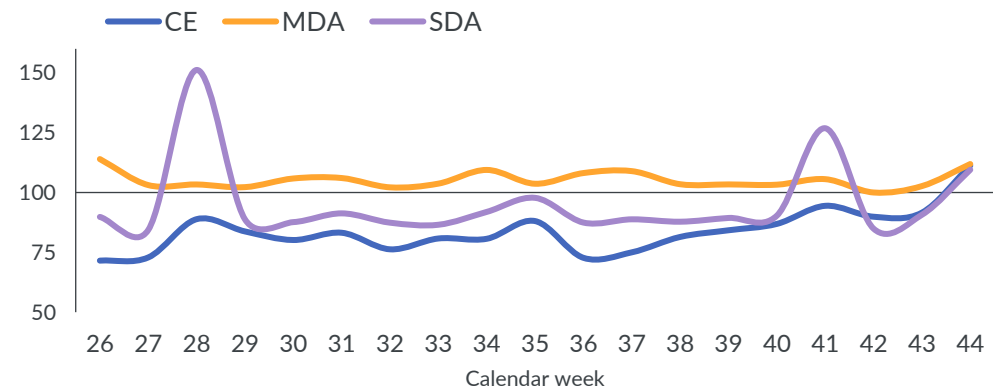
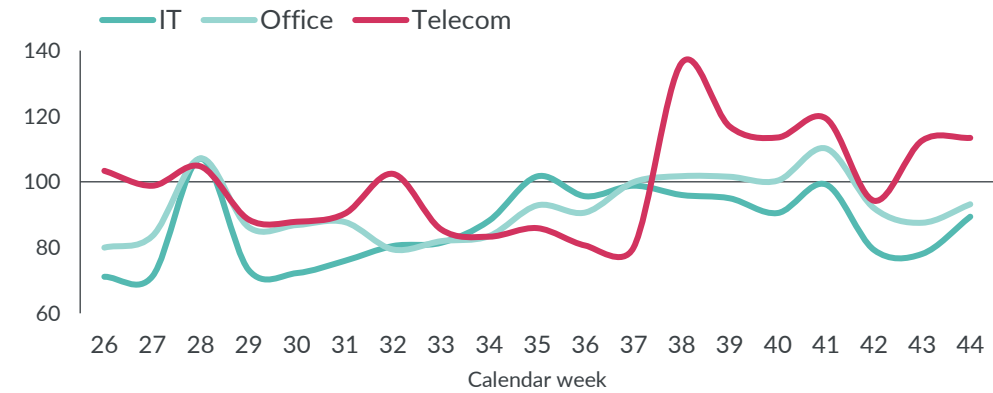
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

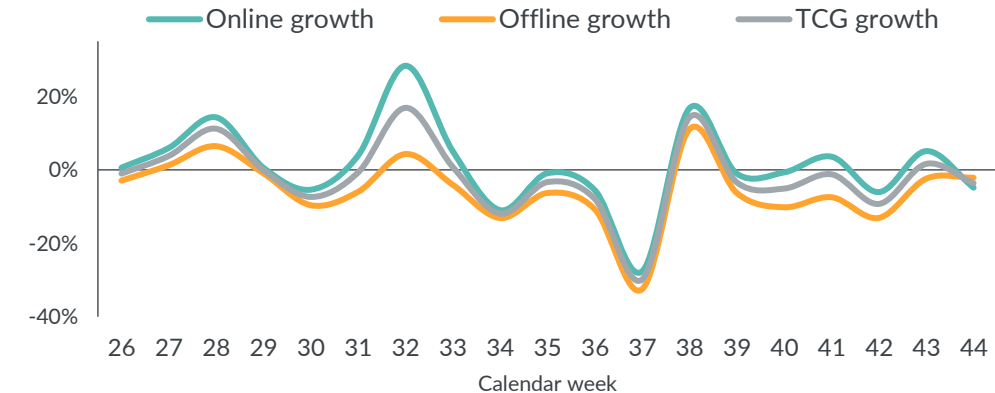


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Index: 2022 average weekly turnover in EUR = 100



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



Key take aways in calendar week 44 (Oct 30 - Nov 05)



- The deceleration of online sales (-5%) dragged the total TCG market down by 4%. Traditional retail added to it by delivering -2%.
- The negative trends for IT/Office products were led by media tablets at -24%, while desk computing and laser printers shared the second place (-16%). Mice were up 13%. Smartphones accelerated at +4%.
- Soundbars at -23% added to the weak result for TCG, along with PTV at -13%. Within MDA/SDA categories, only food preparation at +15% delivered considerable growth. Shavers experienced a drop of 10%. Dental care and hot beverage makers were flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 44 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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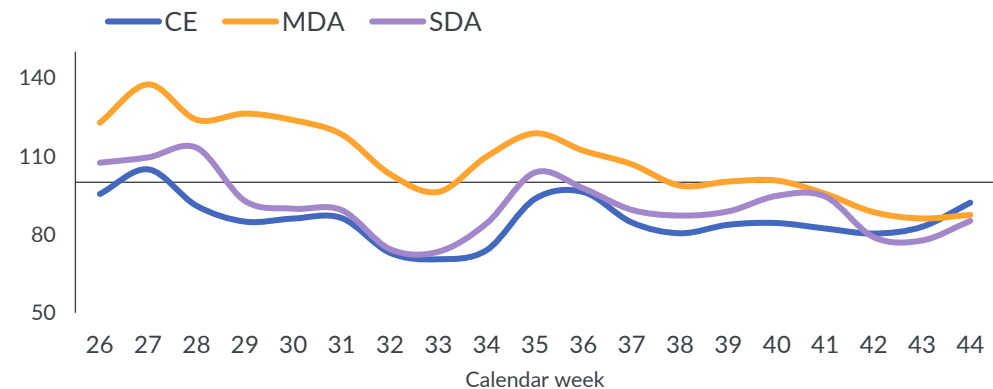
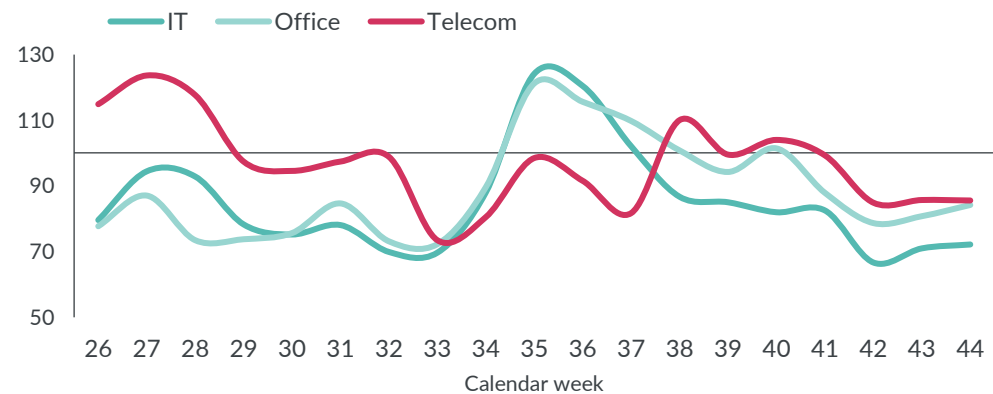
Spain

Japan

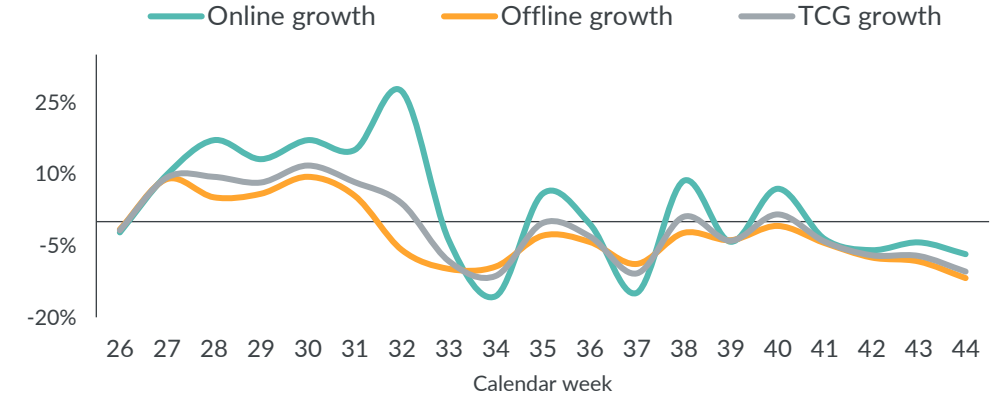
Brazil

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 44 (Oct 30 - Nov 05)



- The deceleration of traditional retail (-12%) dragged the total TCG market down by 10%. Online sales added to it by delivering -7%.
- The negative trends for IT/Office products were led by desk computing at -25%, while laser printers followed in second place (-23%). Monitors were up 5%. Mice were flat. Smartphones increased by a slight 1%.
- TVs and soundbars at -22% added to the weak result for TCG. Within MDA/SDA categories, only air treatment (+7%) delivered growth, all others experienced negative trends, led by dental care at -17% and cooling at -12%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 44 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

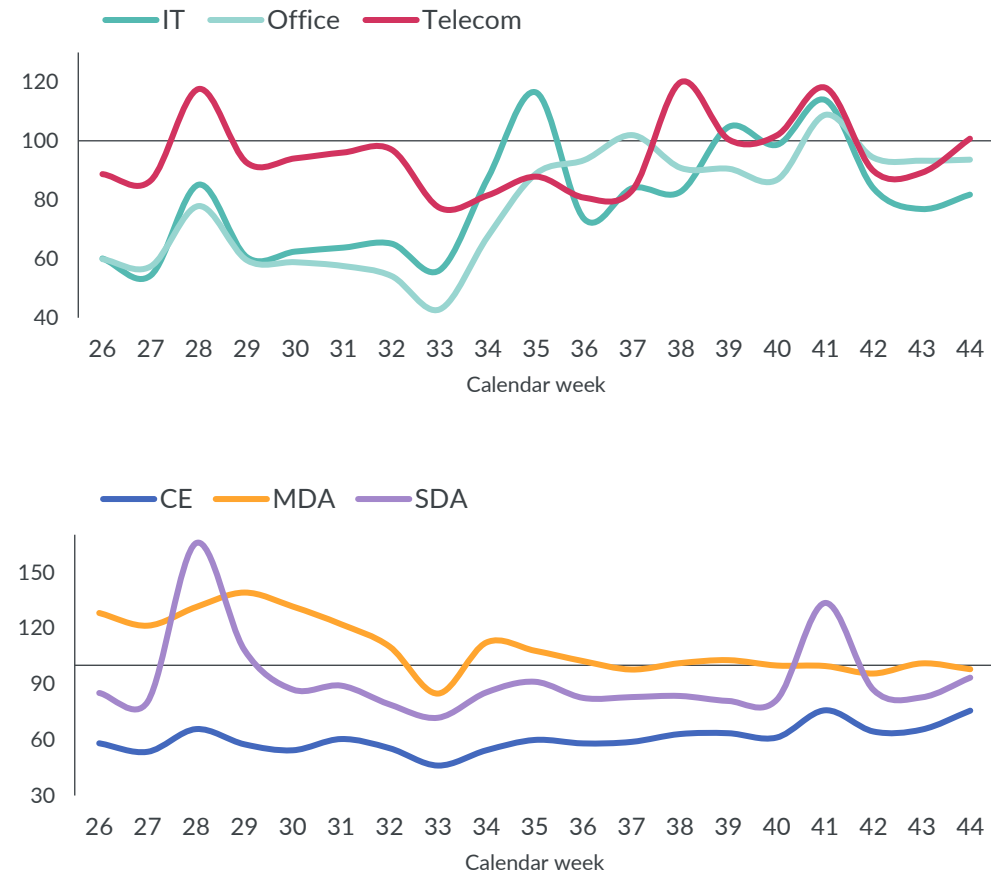
Weekly retail insights from the Point of Sale

Spotlight on Italy

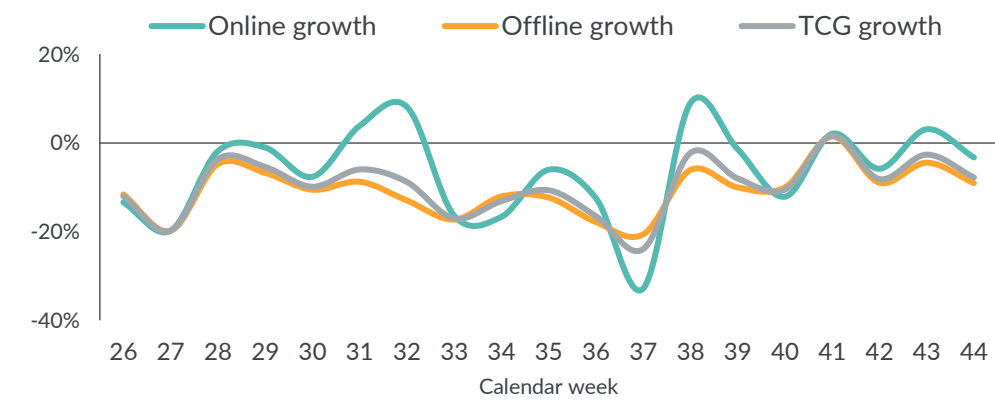


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 44 (Oct 30 - Nov 05)

- Online sales delivered -3% (+3% the previous week) and with traditional retail down -9% (-4% the previous week), the result was a downswing of the total TCG market of 8%.
- Except for laser printers at +18%, all other IT/Office products decreased, led by mobile computing at -23%. Smartphones were up 2%.
- Air treatment was the best-performing category in week 44, at +68%. While dental care was up 6% and hot beverage makers experienced a weak +1%, all other MDA/SDA categories posted negative trends. CE products lost in solid double digits (TVs posting -23%).

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 44 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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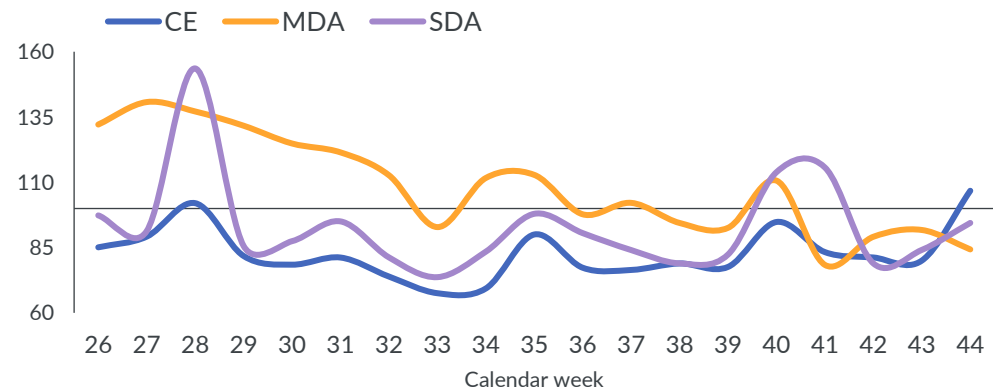
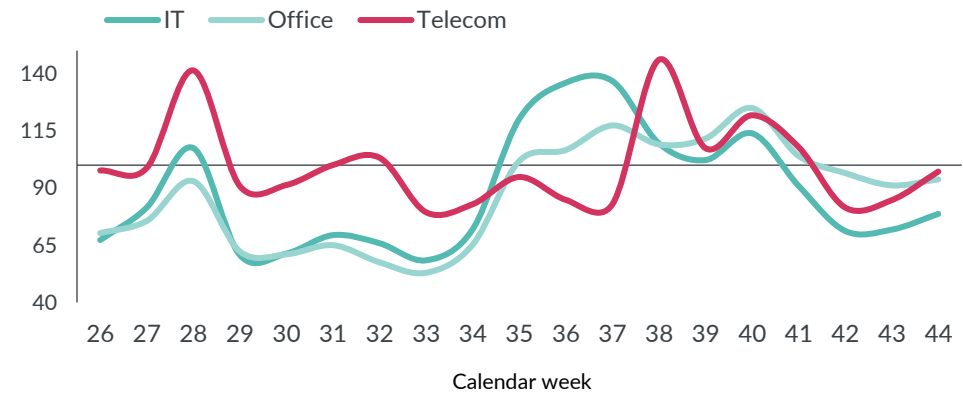
> Spain

Japan

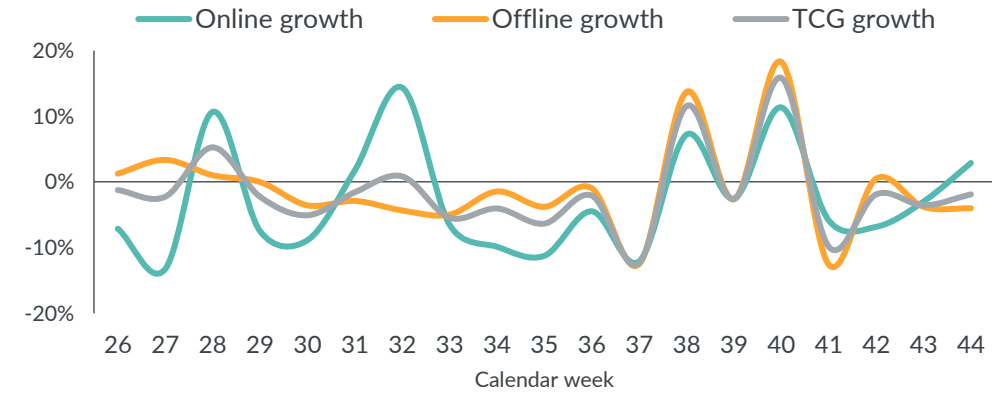
Brazil

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 44 (Oct 30 - Nov 05)



- Traditional retail experienced a minus of 4% versus week 44 in 2022. Online sales at +3% were unable to balance that out, resulting in a slight downswing for the total TCG market of 2%.
- Except for media tablets at -4%, all IT/Office categories delivered double-digit negative trends ranging between -11% for inkjet printers to -26% for desk computing. Smartphones accelerated at +7%.
- Trends for MDA/SDA/CE products were characterized by small ups and downs from -10% for audio home systems to +10% for hot beverage makers. TV sales dropped by 3%. Washing machines were nearly flat.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 44 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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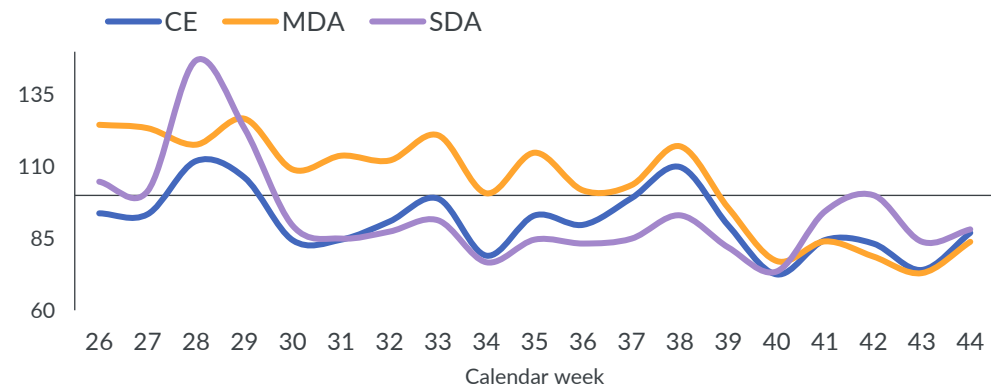
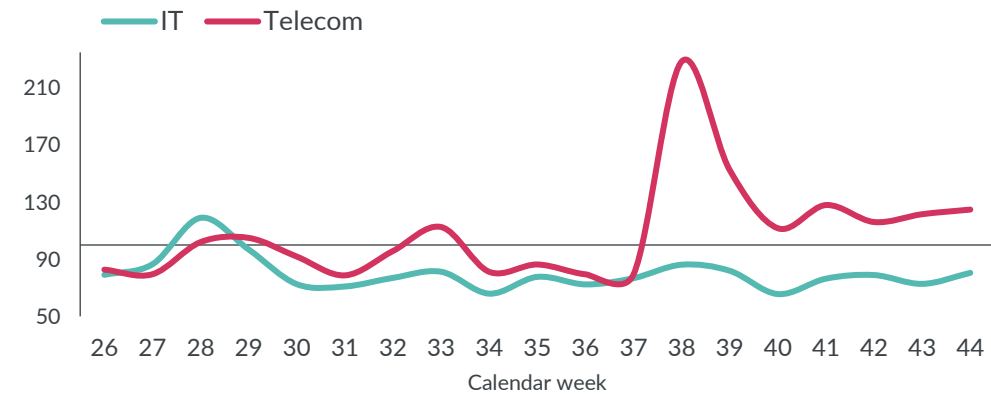
Spain

> Japan

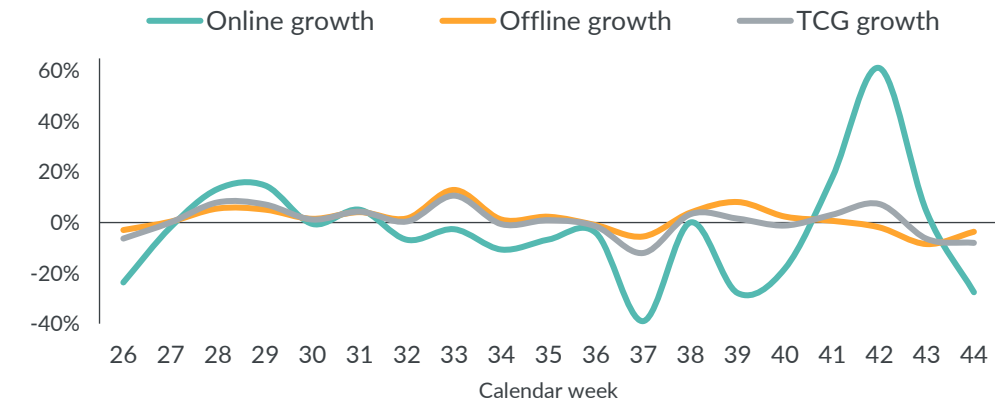
Brazil

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 44 (Oct 30 - Nov 05)



- Traditional retail decelerated by 4%. Online sales plummeted by 27% but as the share is small, the impact on the total TCG market (-8%) was not so substantial.
- Mobile computing slumped at -23%. Media tablets at -4% were much less negative. Smartphones delivered +9%.
- CE products (-18% to -28%) and air treatment (-34%) were the driving force of the losses in TCG. Apart from shavers (+5%) and food preparation (+2%), MDA/SDA categories posted negative trends.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 44 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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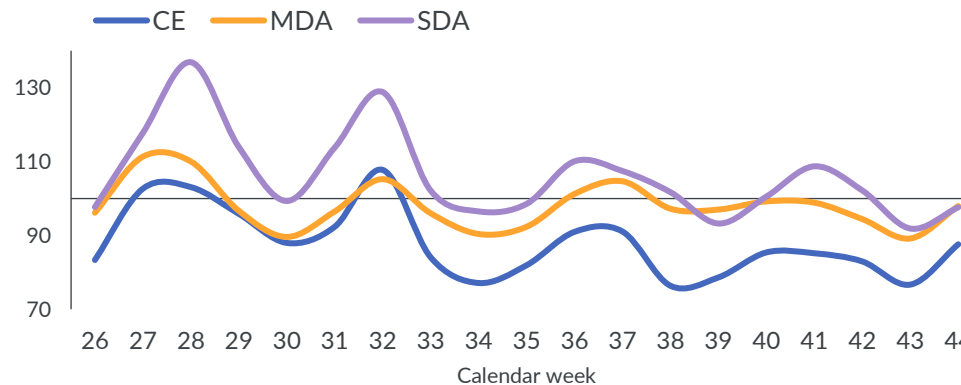
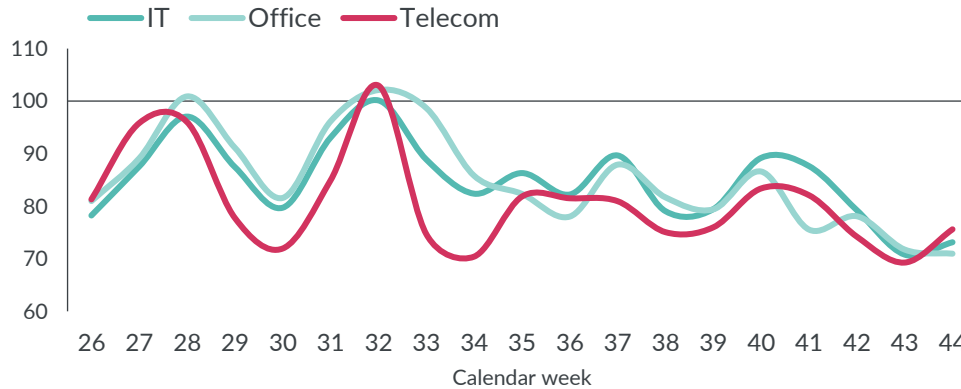
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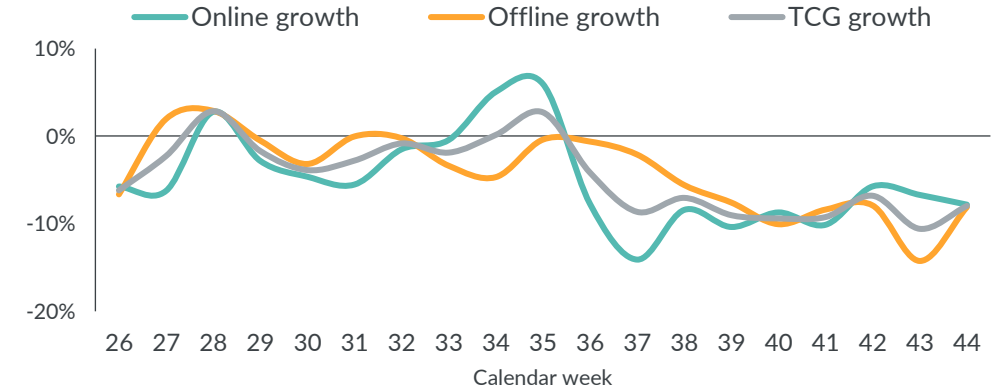
➤ Brazil

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 44 (Oct 30 - Nov 05)



- At an identical rate of -8%, both traditional retail and online sales retail dragged the total TCG market down by -8%.
- Media tablets at +17% performed very well in week 44, while laser printers followed in second place (+15%). The other IT/Office categories posted negative trends. Smartphones slumped at -14%.
- The best-performing category in week 44 was cooling at +20%, while CE products lost in solid double digits. Shavers lagged at -11% but most of the other MDA/SDA categories experienced a double-digit uplift. Only vacuum cleaners were a bit weaker at +8%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 44 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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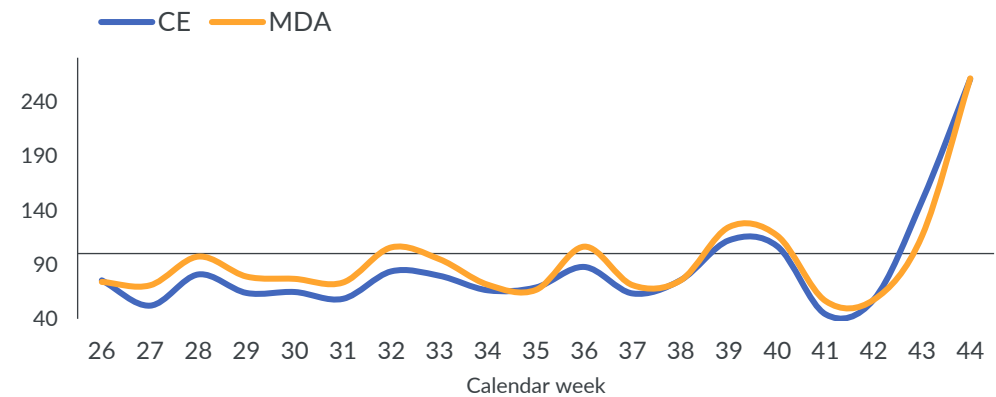
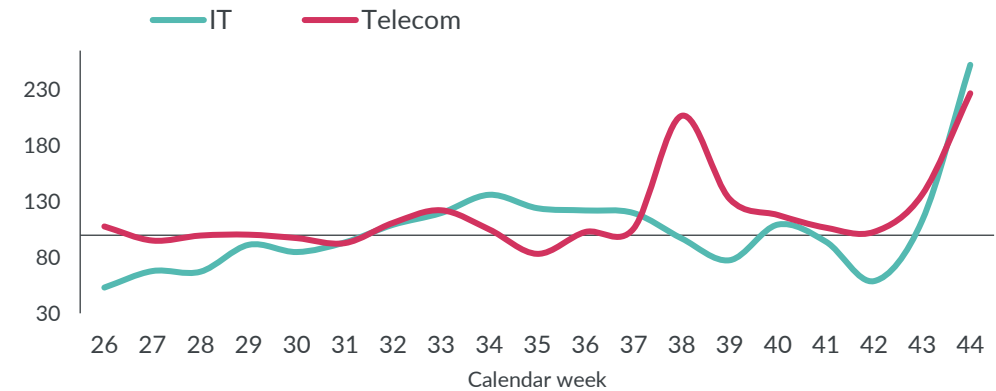
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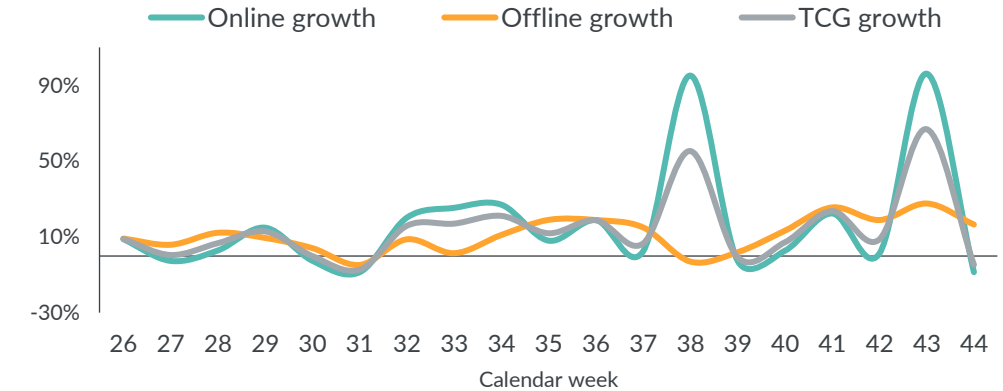
Brazil

➤ 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 44 (Oct 30 - Nov 05)



- The week before 11.11 in 2023 was weaker than the same week in 2022. The total TCG market decelerated by 5%, driven by online sales at -8%. Traditional retail gained 17% vs week 44 2022.
- Smartphones were the driving force of this development, decelerating at -5%. Mobile computing delivered a plus of 9%.
- Week 44 in 2023 saw decreases YoY for both washing machines and cooling of -10%. In terms of growth rate, TVs were the worst-performing product group at -29%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 - 44 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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