



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 183
cw47/2023

Powered by **gfknewron**

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

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.

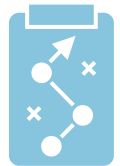
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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



Outperform expectations and give decision-makers data at their fingertips



Revolutionize the way you strategize and grow with forecasts and simulations



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- Maximize engagement with deep customer insights, with **gfknewron Consumer**
- Win the market with the help of AI prescriptive knowledge, with **gfknewron Predict**



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Fact of the Week



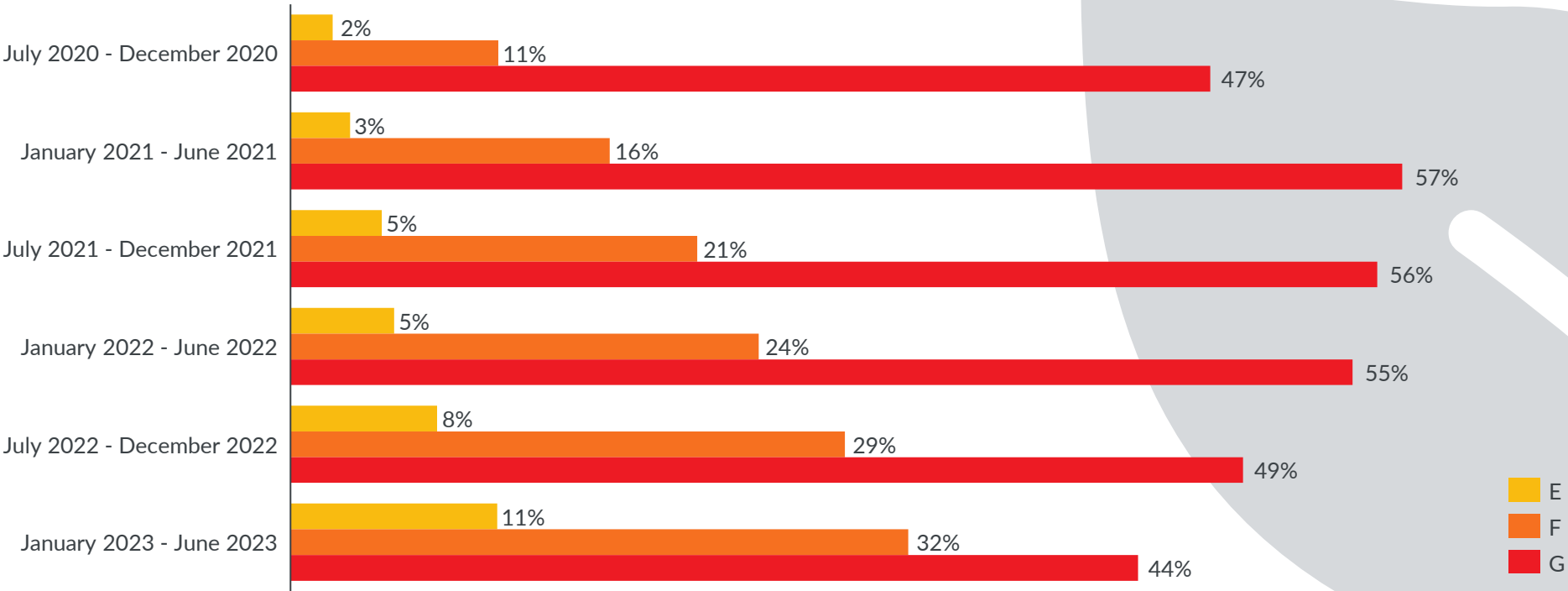
Energy efficiency is not the core focus of the TV market. The demand for more efficient TVs is growing though - on lower levels. First movers take the advantage!

About **gfknewron**

GfK Panelmarket | PTV | EU25 | Sales Units Ths/%

> Fact of the week

- Germany
- Great Britain
- France
- Italy
- Spain
- 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

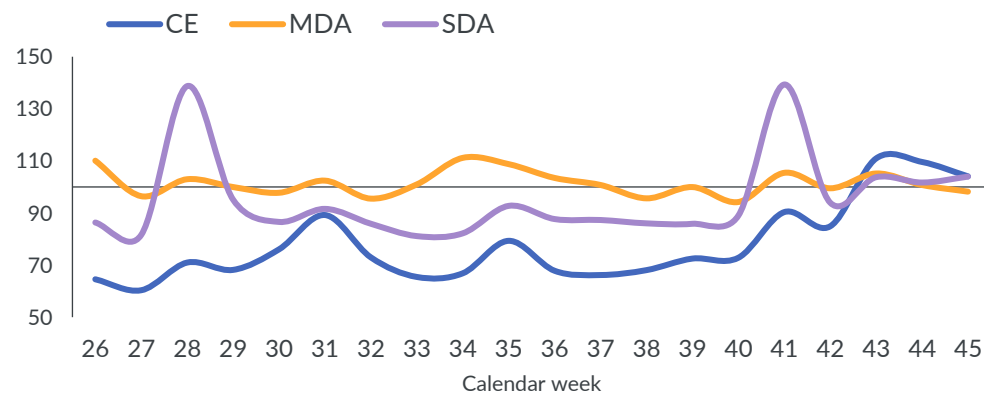
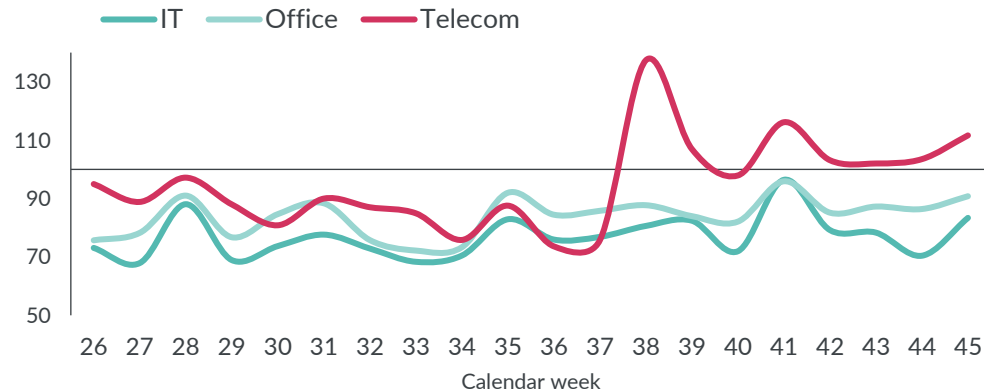
Spain

Japan

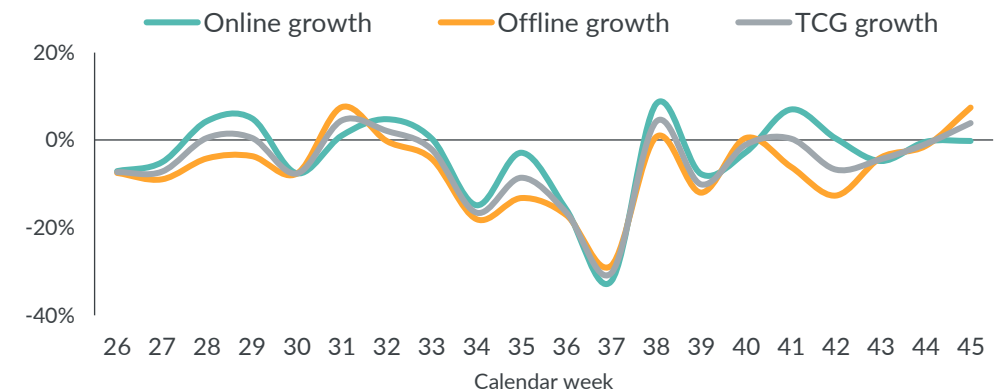
Brazil

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 45 (Nov 06 – Nov 12)



- Online sales were flat again in week 45. This time a strong performance by traditional retail (+7%) lifted the total TCG market to a plus of 4%.
- Except for monitors at -3% and desk computing at -7%, all other IT/Office products posted double-digit negative trends, led by mobile computing at -26%. Smartphones increased by 18%.
- Dental care (+12%) and shavers (+11%) were the best-performing categories within MDA/SDA/CE products. Soundbars at -31% marked the other end of the scale. TV sales lagged at -4%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2022 – 45 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.

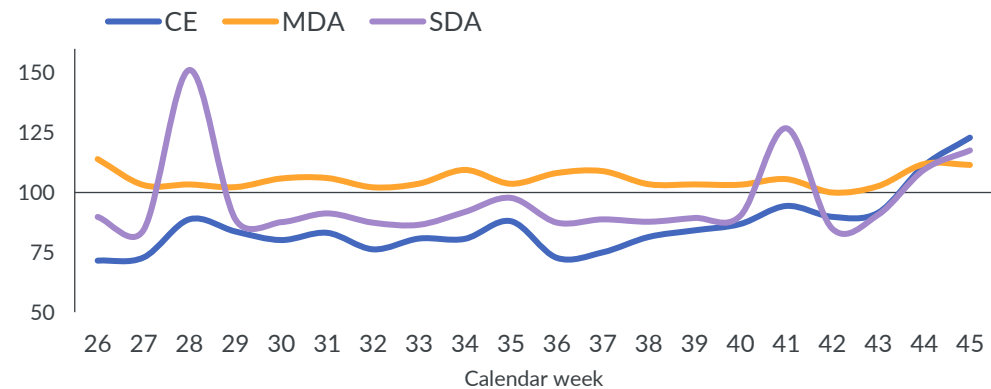
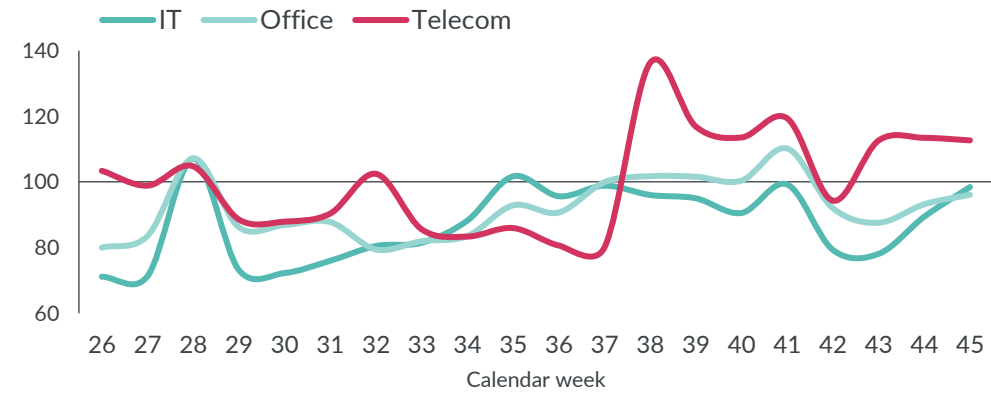
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

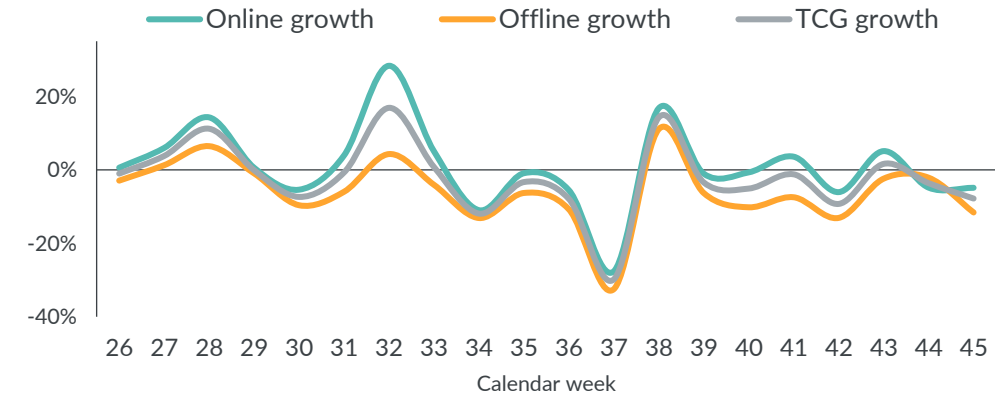


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- France
- Italy
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- Japan
- Brazil
- China

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 45 (Nov 06 – Nov 12)



- The deceleration of traditional retail (-12%) dragged the total TCG market down by 8%. Online sales added to it by delivering -5%.
- The negative trends for IT/Office products were led by media tablets at -42%, while mice (+15%), keyboards (+5%), and monitors (+4%) posted growth. Smartphones decelerated at -3%.
- Soundbars at -20% added to the weak result for TCG, along with PTV at -18%. MDA/SDA categories posted a mixed picture, ranging from -11% for shavers to +12% for food preparation.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 45 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): 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



About **gfknewron**

Fact of the week

Germany

Great Britain

> France

Italy

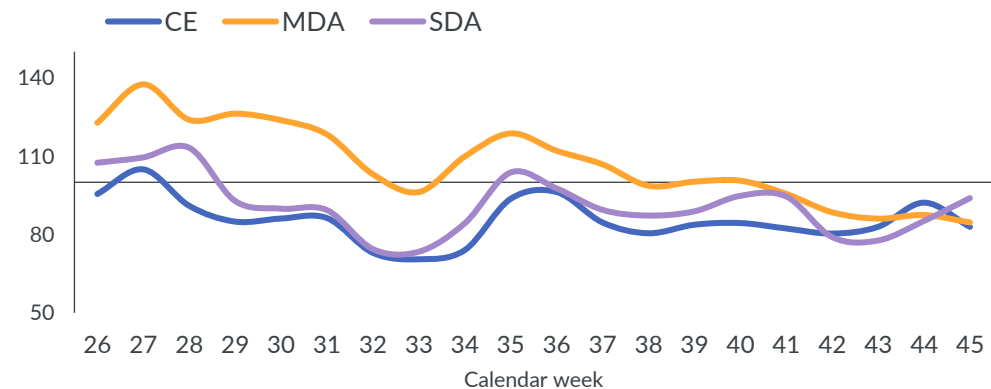
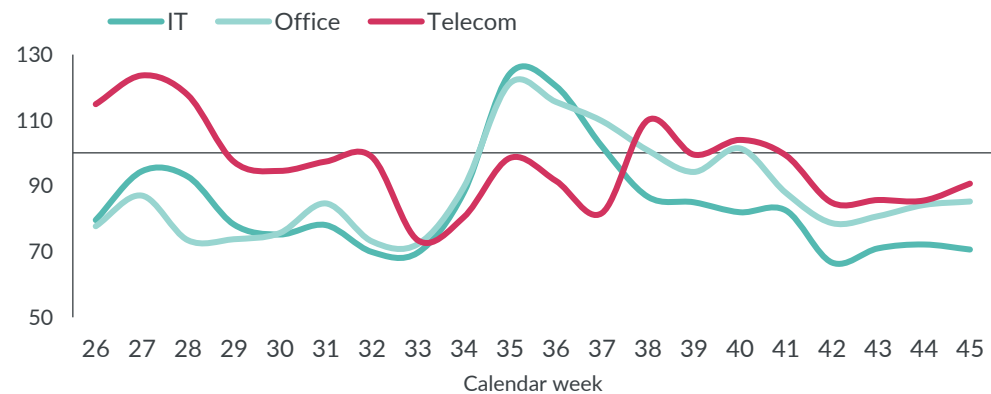
Spain

Japan

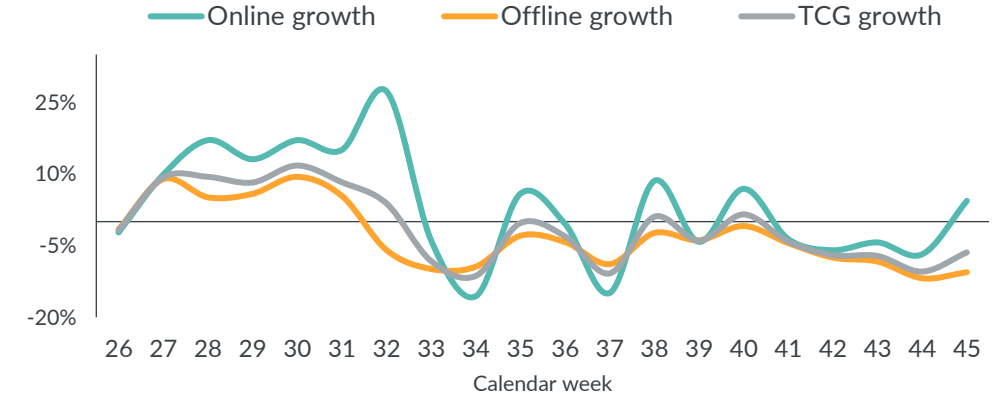
Brazil

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 45 (Nov 06 – Nov 12)



- Traditional retail delivered -11%, but online sales at a weak +4% failed to convert the total TCG market to positive growth, leaving it at -6%.
- IT/Office products ranged from +16% for mice to -26% for media tablets. Smartphones accelerated at +14%.
- TVs and soundbars at -27% and -30% respectively added to the weak result for TCG. Within MDA/SDA categories, only shavers (+4%) and hot beverage makers (+2%) delivered notable growth, all others experienced negative trends, led by food preparation at -18%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 45 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



About **gfknewron**

Fact of the week

Germany

Great Britain

France



Italy

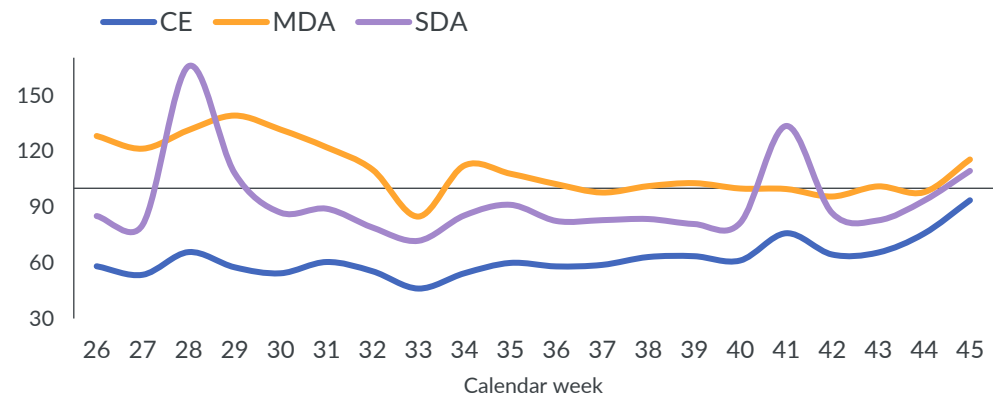
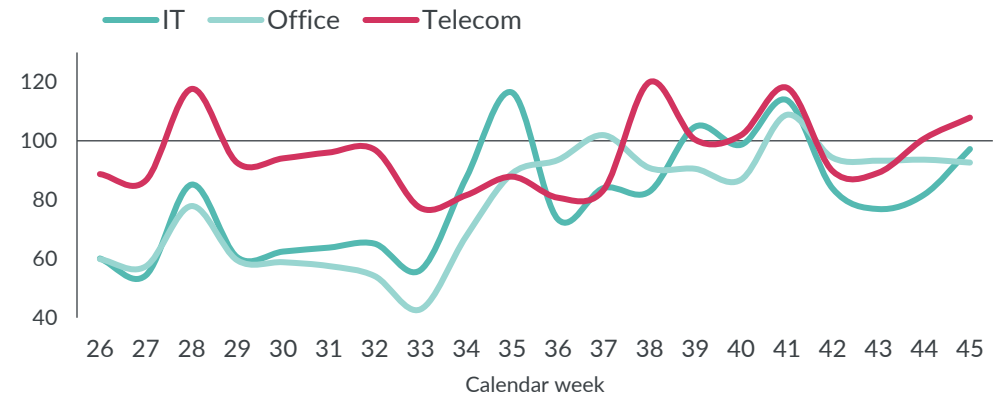
Spain

Japan

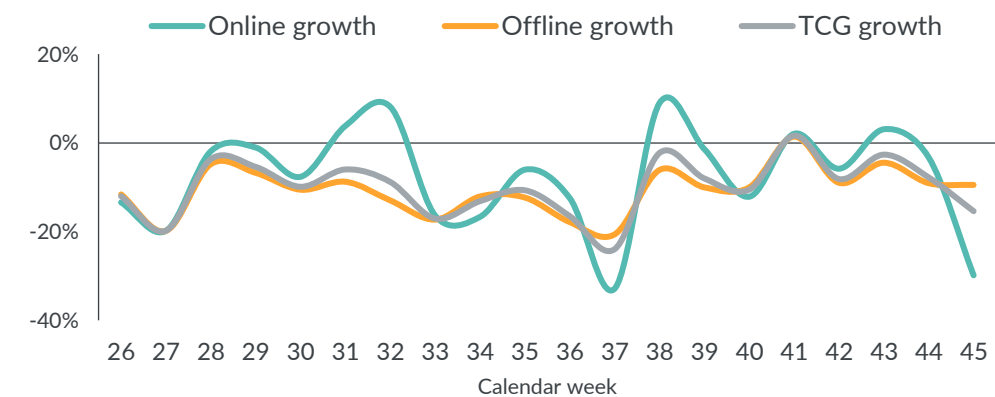
Brazil

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 45 (Nov 06 – Nov 12)



- Online sales experienced a sharp drop of -30% versus week 45 in 2022 which dragged the total TCG market down by 15%. Traditional retail added to it by delivering -9%.
- Except for laser printers at -3%, all other IT/Office products decreased by double digits, led by desk computing at -41%. Smartphones lagged at -11%.
- Air treatment was the best-performing category in week 45, at +48%. While dental care was up 8% and hot beverage makers experienced a plus of 6%, most other MDA/SDA categories posted negative trends. CE products decreased overall with TVs posting -32%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 45 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



About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

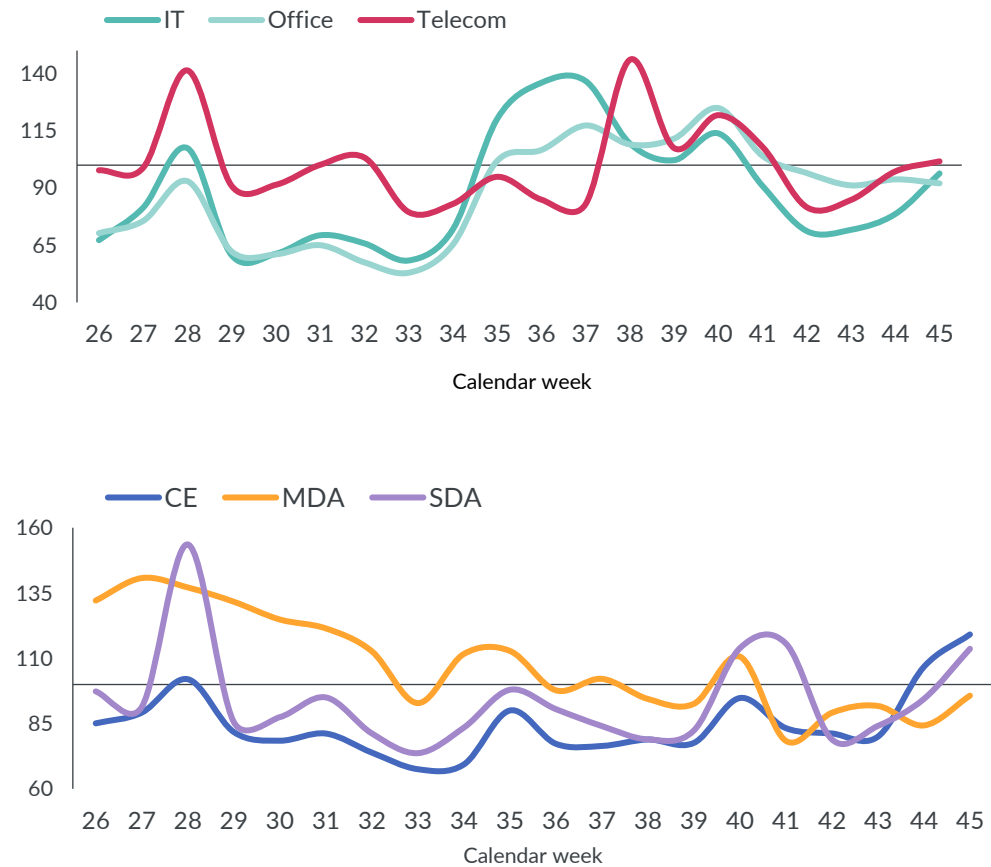
Spain

Japan

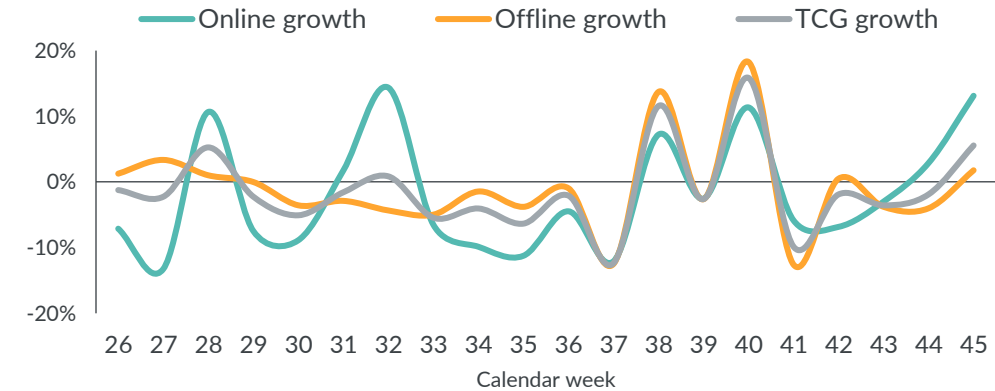
Brazil

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 45 (Nov 06 – Nov 12)



- Traditional retail experienced a slight uplift of 2% versus week 45 in 2022. Online sales at +13% lifted the total TCG market to a plus of 6%.
- Laser printers were weak at -15% but other IT/Office products like desk computing (+17%) and media tablets (+16%) delivered a good performance. Inkjet printers were flat. Smartphones accelerated at +15%.
- While audio home systems were hit strongly, at -32%, PTV sales were less negative (-6%). Vacuum cleaners at +39% were the highlight of week 45. Except for cooling at -2%, all other MDA/SDA categories delivered positive trends as well.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 45 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

Germany

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Italy

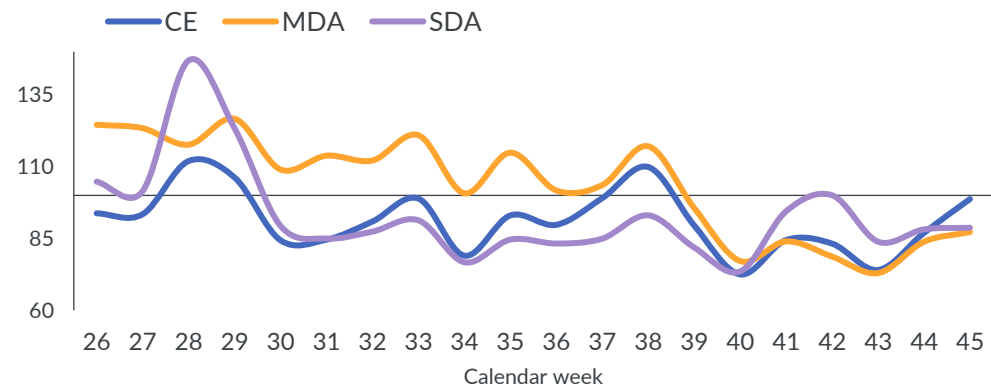
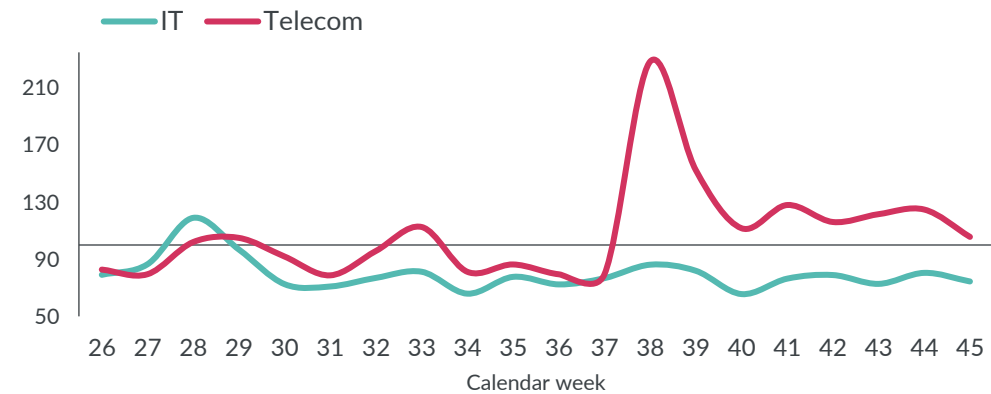
Spain

> Japan

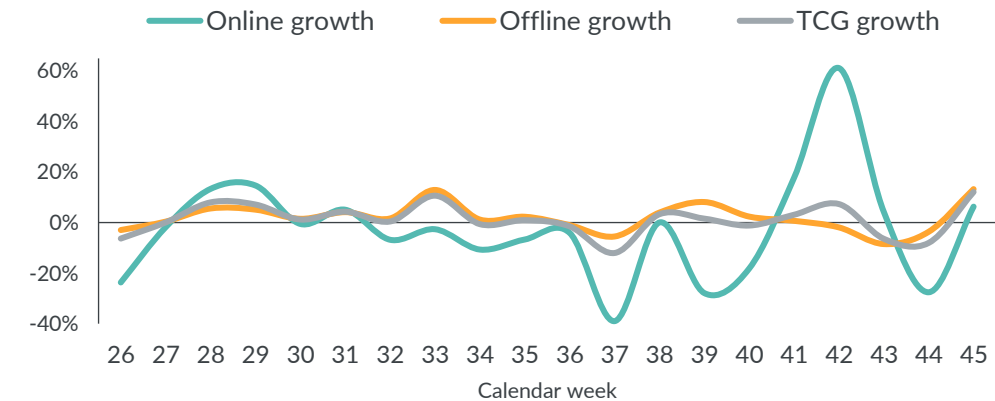
Brazil

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 45 (Nov 06 – Nov 12)



- Online sales delivered +6%. When combined with well-performing traditional retail at +13%, the total TCG market saw an upswing of 12%.
- Media tablets at -19% were weak and mobile computing at +3% was unable to deliver an uplift for IT/Office products. While smartphones delivered +20%, headsets added +5% to the CE results.
- Except for air treatment (-12%), hot beverages (-3%), and audio home systems (+6%), week 45 was successful for most MDA/SDA/CE categories, posting double-digit growth. Cooling took the lead at +23% and soundbars claimed second place at +19%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 45 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**

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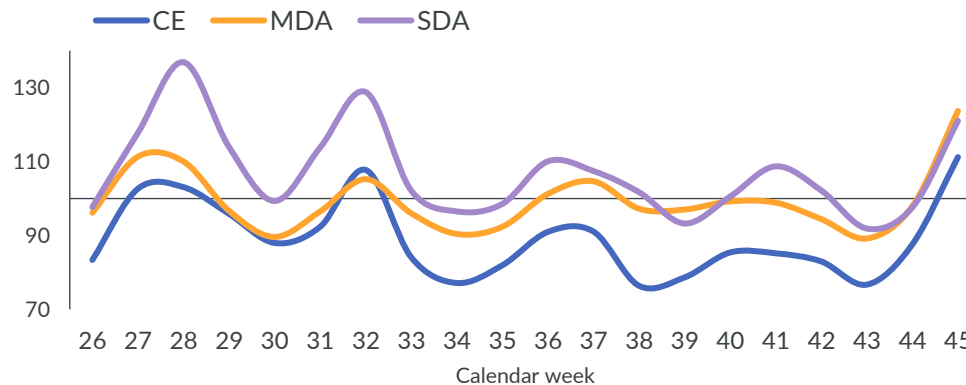
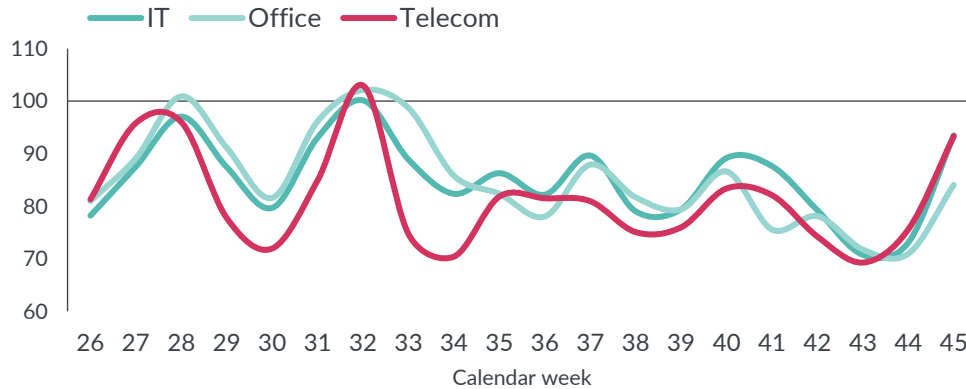
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Japan

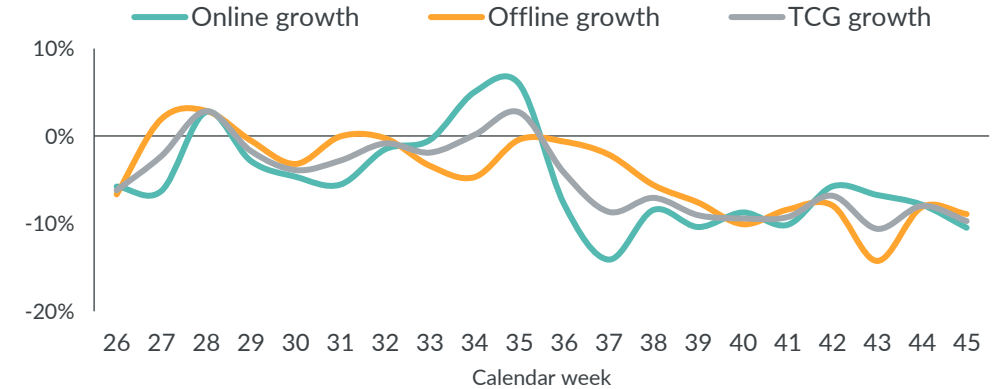
➤ Brazil

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 45 (Nov 06 – Nov 12)



- Similar rates of -9% for traditional retail and -10% for online sales dragged the total TCG market down by 10%.
- Media tablets at +38% were the best-performing category in week 45, while all other IT/Office categories posted negative trends, with mobile computing delivering -8%. Smartphones slumped at -14%.
- The overall positive picture for MDA and SDA product groups was determined by growth for most categories apart from -11% for shavers. Cooling delivered the best result, at +21%. TV sales experienced -24% in week 45 and audio home systems lost 23%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 45 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



About **gfknewron**

Fact of the week

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Italy

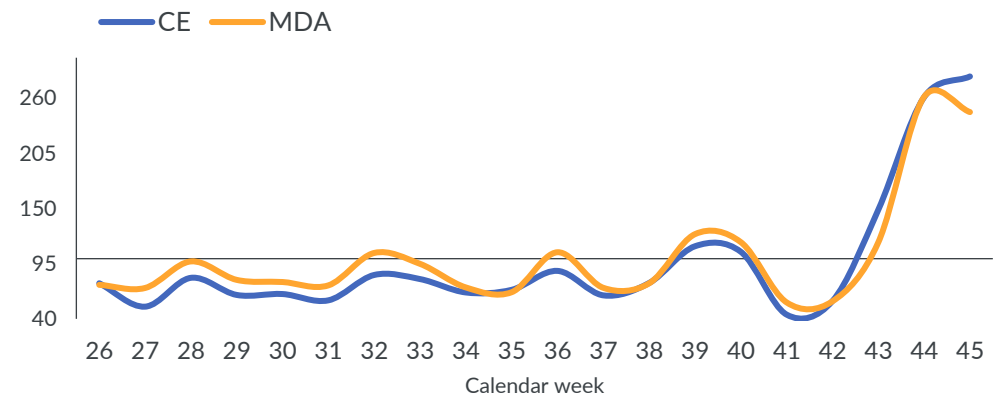
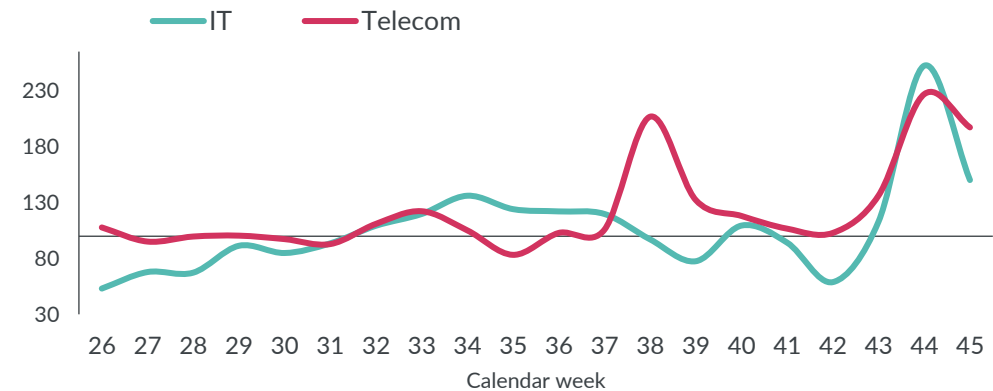
Spain

Japan

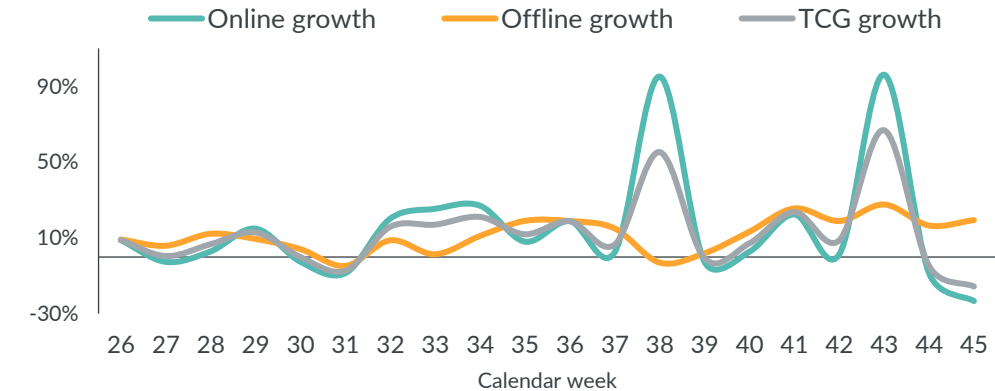
Brazil

➤ 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 45 (Nov 06 – Nov 12)



- The Singles' Day week (11th Nov) failed to deliver the extraordinary results of previous years the second year in a row. The total TCG market lost 16%, driven by online sales (-23%). Traditional retail (+19%) was not able to balance that out.
- Smartphones were the driving force of this development, decelerating at -17%. Mobile computing delivered a minus of 19%.
- Week 45 in 2023 saw strong deceleration for TVs (-30%). MDA categories were hit less, with washing machines decreasing by 7% and cooling by 6%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 45 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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