



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 184
cw48/2023

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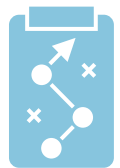
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Second Prime Day performance of this year slightly improved vs last year ...



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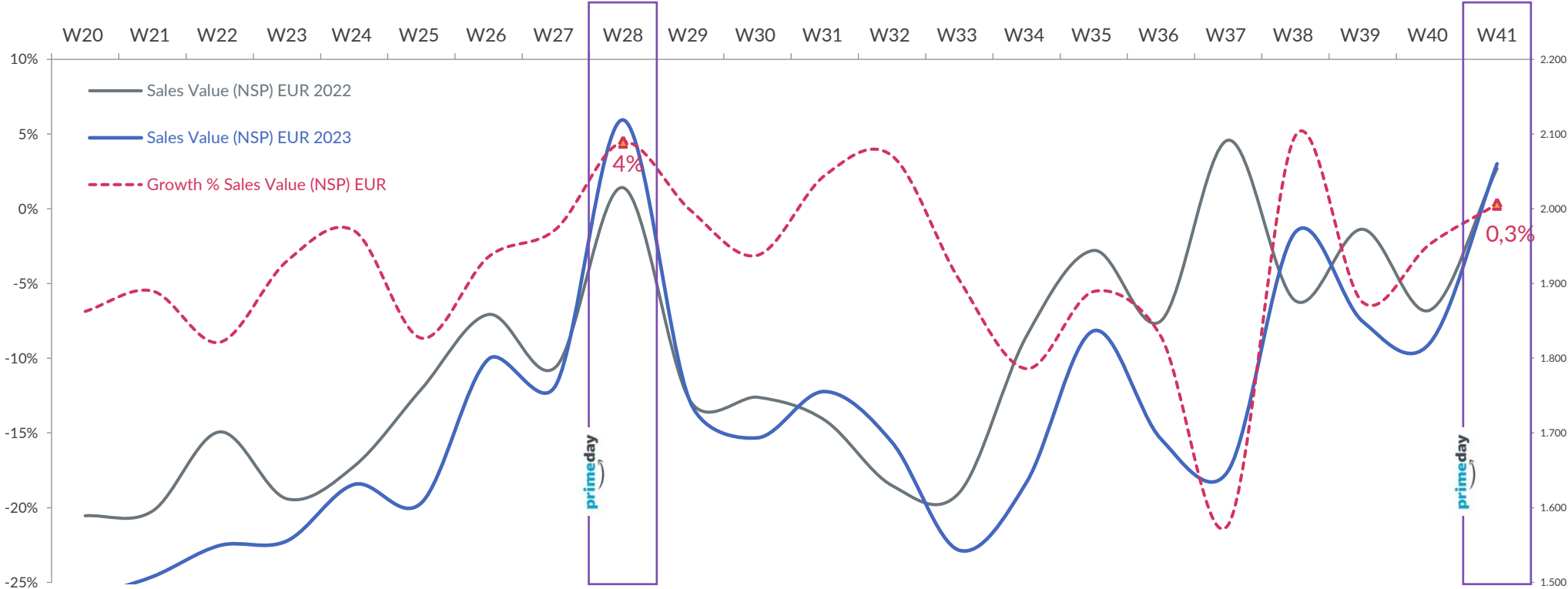
Japan

Brazil

China

EU5 | Consumer Tech and Durables | W01 22 – W41 23 | Sales Value NSP EUR (Million)

... however, underperformed benchmarks vs 1st Prime Day of this year.



Source: GfK Market Intelligence: Sales Tracking, EU: DE, GB, IT, ES, FR, Sectors included in total – CE, IT, Telecom, SDA, MDA, Healthcare, MTG, Office, Photo | Growth percentage vs last year same week | Data as of Oct 24th, 2023, and the 1st Prime Day numbers vary from previous report due to republishes.

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

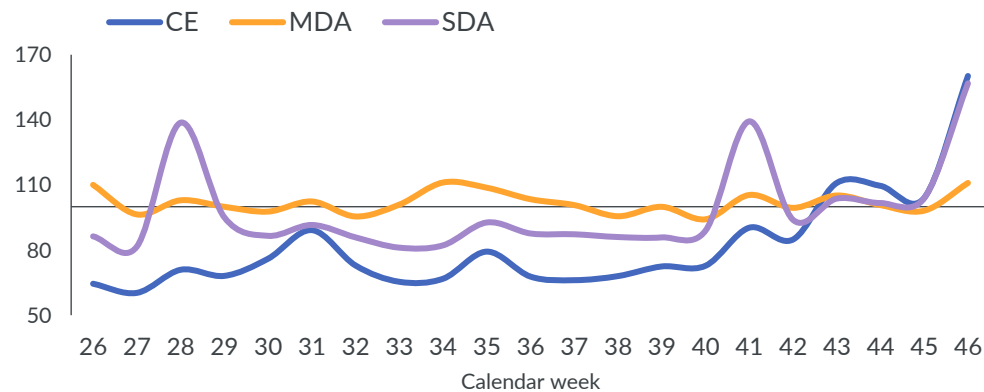
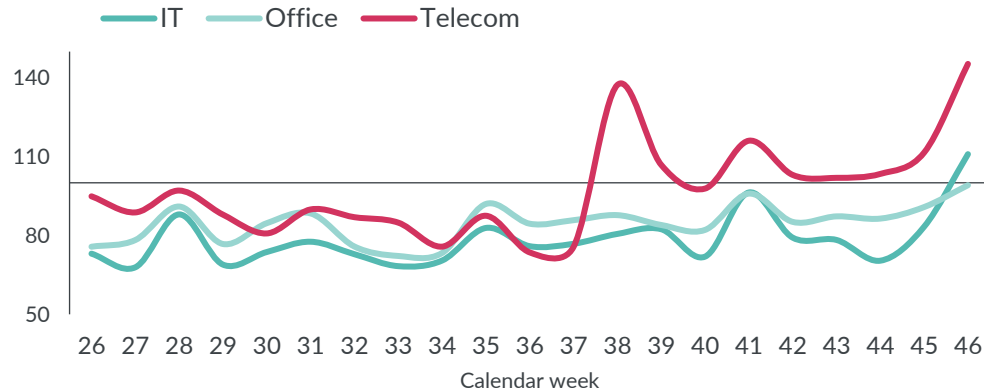
Spain

Japan

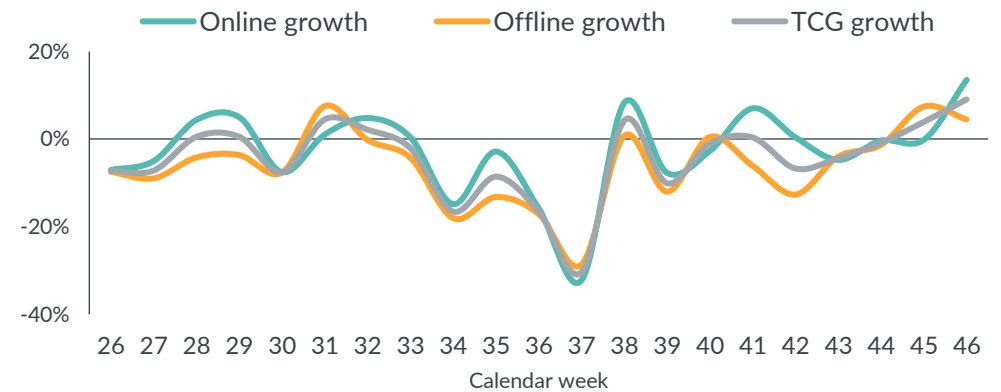
Brazil

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 46 (Nov 13 – Nov 19)



- The total TCG market accelerated at 9%, driven by online sales which delivered +13%. Traditional retail increased by 4%.
- Except for monitors at +3%, all other IT/Office products posted negative trends of between -7% for inkjet printers and -14% for mobile computing. Smartphones increased by 19% in week 46.
- CE products posted negative trends, with TVs at -5%. MDA and SDA categories delivered growth throughout with dental care in the lead at +28%. Vacuum cleaners at +25% and shavers at +23% were close behind. MDAs were a little weaker.

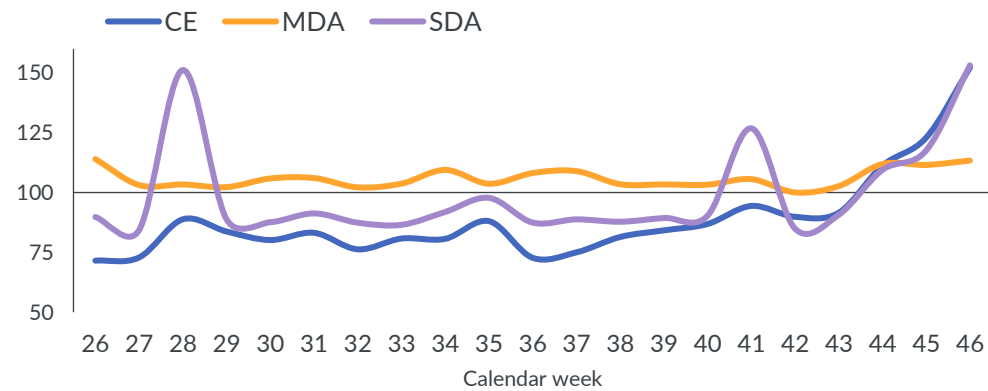
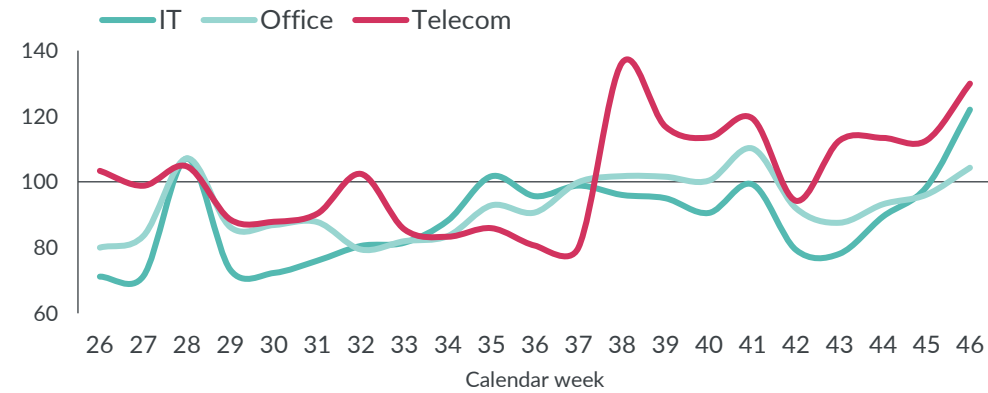
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

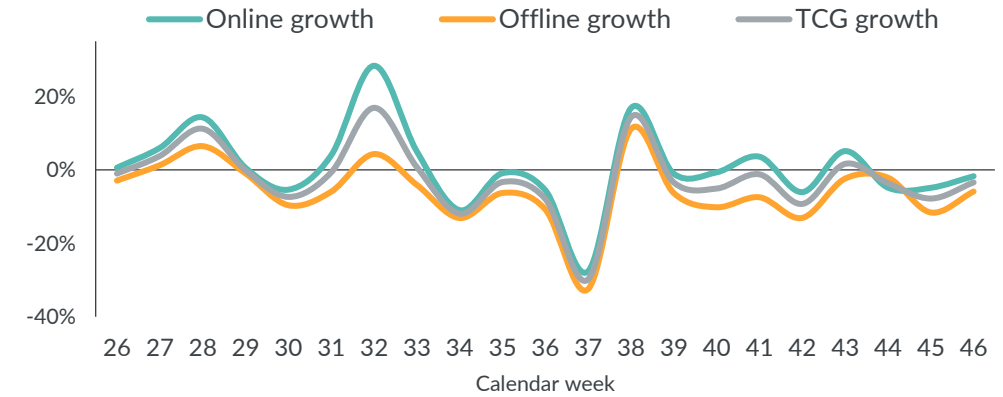


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 46 (Nov 13 – Nov 19)



- The deceleration of traditional retail (-6%) dragged the total TCG market down by 3%. Online sales added to it by delivering -2%.
- The negative trends for IT/Office products were led by media tablets at -36%, while mice (+26%) and keyboards (+15%) posted growth. Smartphones accelerated at +8%.
- Audio home systems at -17% added to the weak result for TCG, along with PTV at -15%. MDA categories were down -9% for cooling and -3% for washing machines. Except for vacuum cleaners at -6%, all other SDA categories delivered growth with hot beverage makers in the lead at +12%.

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

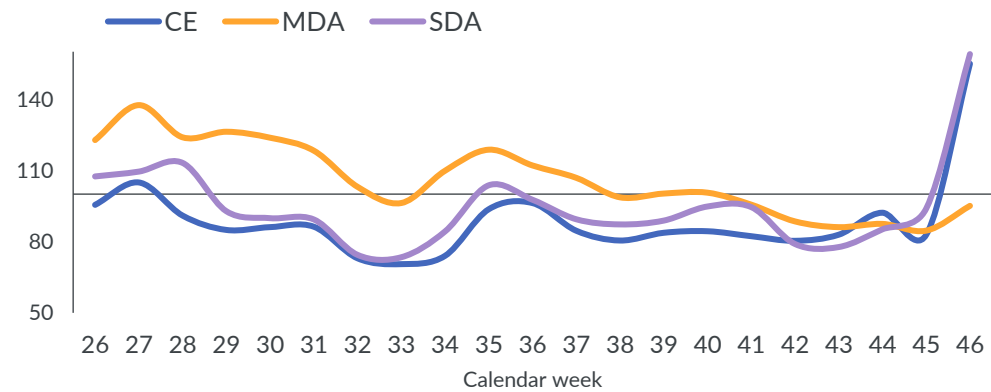
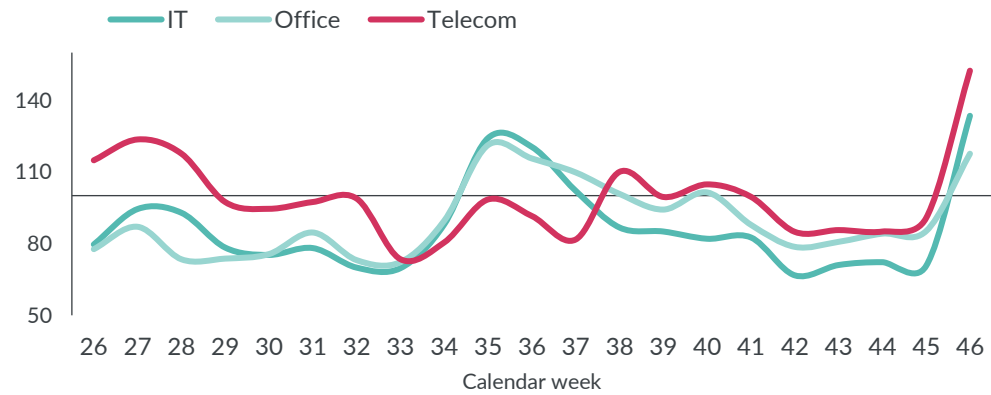
Weekly retail insights from the Point of Sale

Spotlight on France

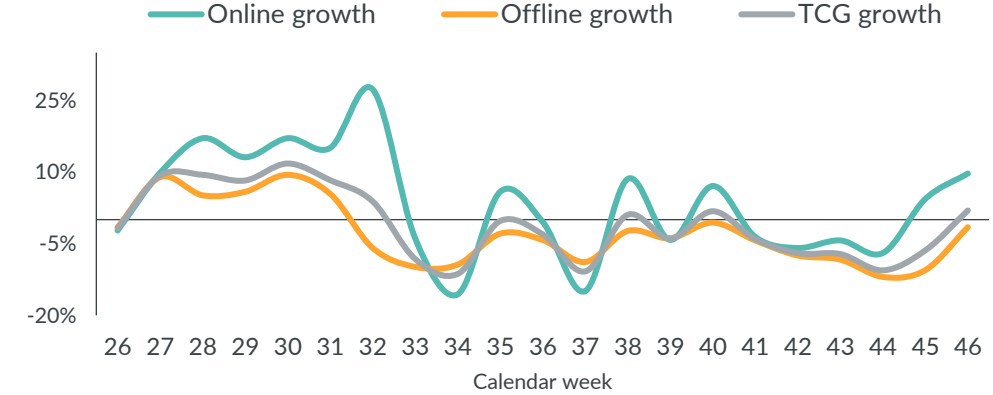


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 46 (Nov 13 – Nov 19)



- Online sales developed well in week 46 (+10%) but decreasing traditional retail (-2%) left the total TCG market at a weak +2%.
- IT/Office products ranged from +25% for monitors to -20% for mobile computing. Smartphones accelerated at +26%. Headsets were up 10%.
- The highlight of week 46 was dental care at +56%. Air treatment at +19% enjoyed considerable growth, too. CE categories fell in double digits throughout with TV sales down by 15% and audio home systems slumping at -30%.

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



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Italy

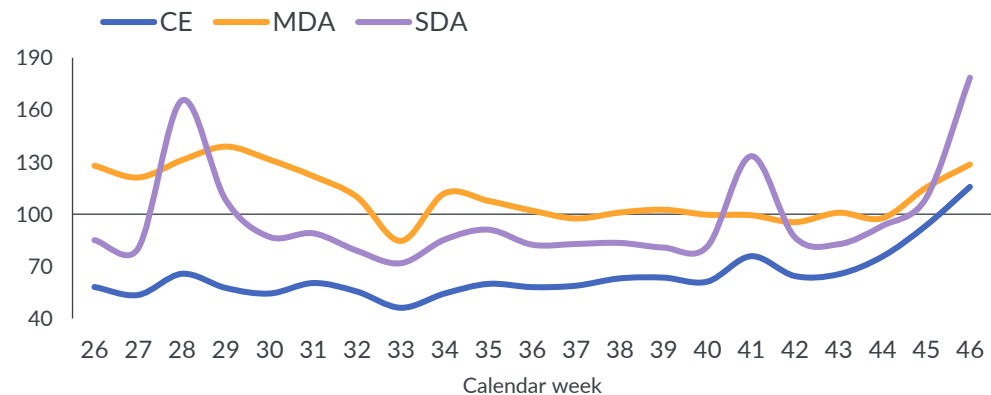
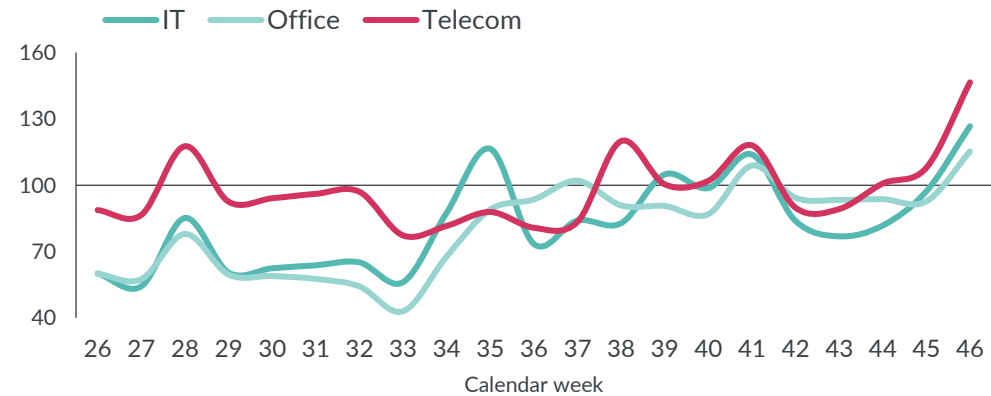
Spain

Japan

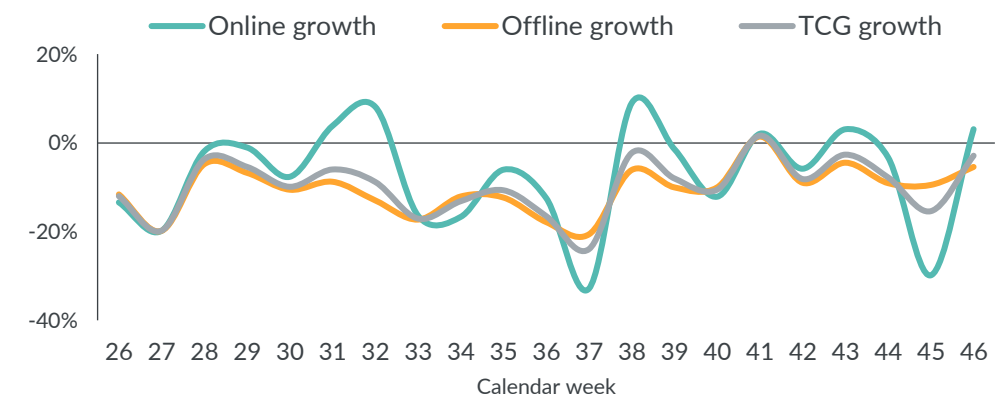
Brazil

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 46 (Nov 13 – Nov 19)



- Online sales experienced a plus of 3% versus week 46 in 2022, but this failed to compensate for the losses of traditional retail (-5%) and left the total TCG at a minus of 3%.
- Except for laser printers at +7%, all other IT/Office products decreased, with desk computing out in front at -15%. Smartphones were nearly flat at +0.6%.
- Air treatment was the best-performing category in week 46, at +20%. MDA and SDA categories overall showed a mixed picture, with food preparation at -5% hit the most. Within CE, audio home systems were down 37%.

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



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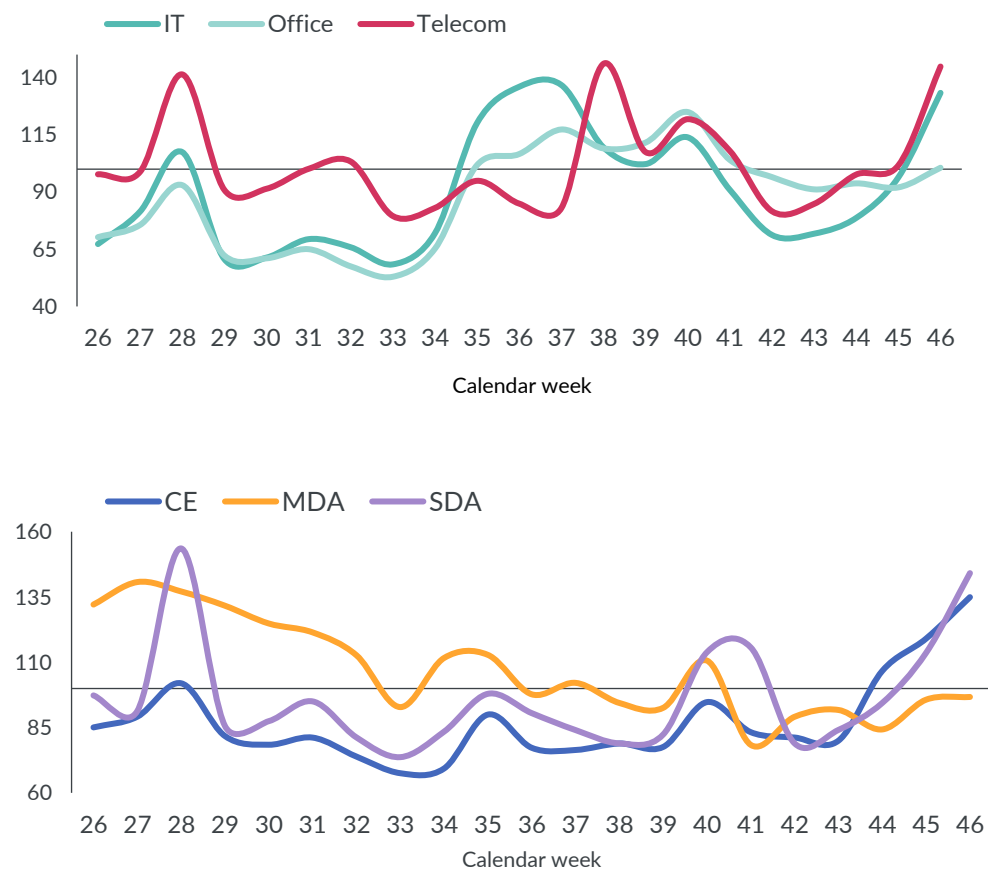
> Spain

Japan

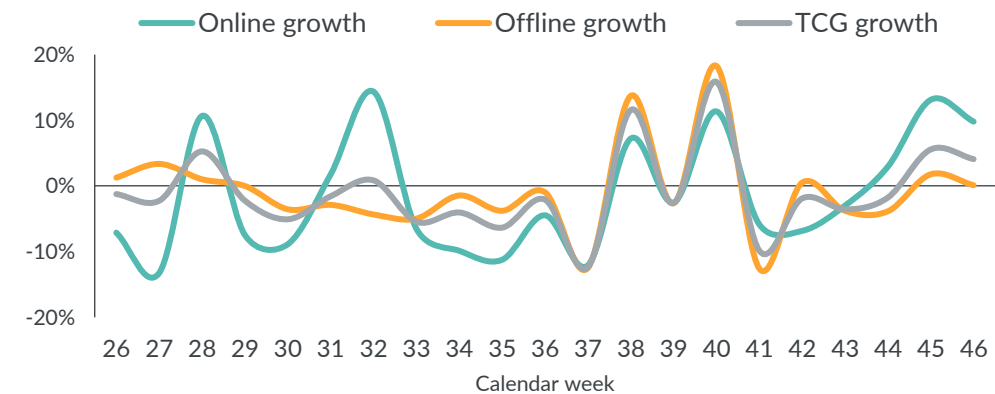
Brazil

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 46 (Nov 13 – Nov 19)



- Online sales delivered +10%, but flat traditional retail left the total TCG market at a single-digit +4%.
- While media tablets at +10% were the driver of the IT/Office categories, laser printers slumped at -15%. Smartphones accelerated at +26% and headsets at +16% boosted the good result for telecom.
- CE products were impacted strongly, all delivering double-digit negative rates, with audio home systems in the lead at -16%. MDA/SDA categories experienced growth throughout, with vacuum cleaners out in front at +20%.

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



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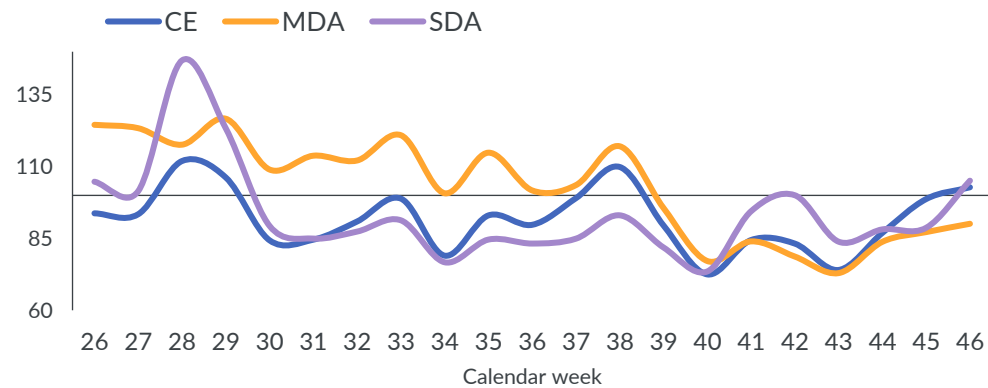
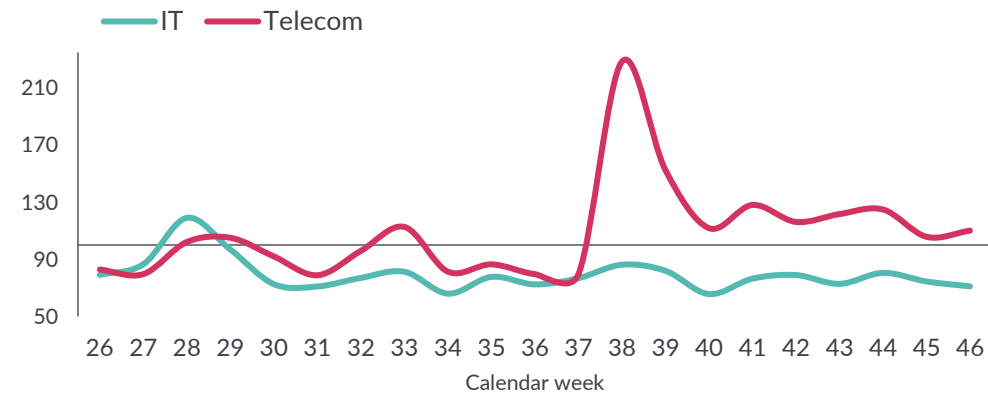
Spain

> Japan

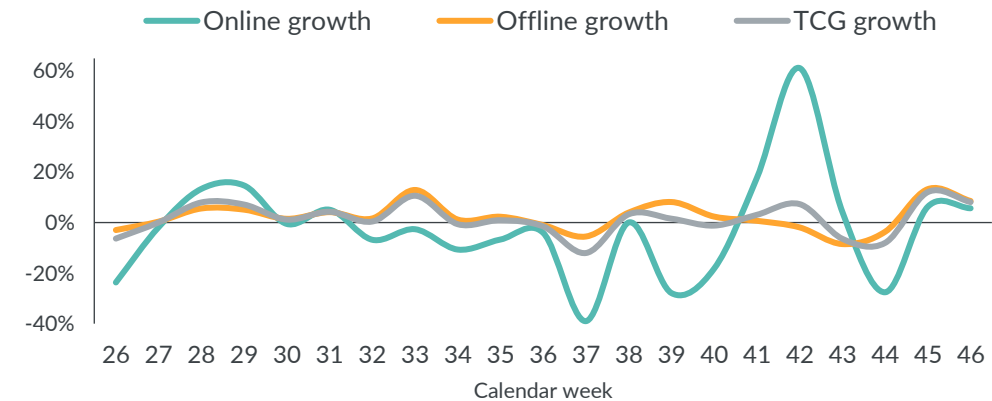
Brazil

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 46 (Nov 13 – Nov 19)



- Online sales delivered +6%. Combined with traditional retail at +9% this resulted in an upswing for the total TCG market of 8%.
- Mobile computing and media tablets both decelerated - at -13% and -20% respectively. Smartphones delivered +31%, headsets were weak at +1%.
- Air treatment was the best-performing category in week 46, at +25%. Except for hot beverage makers at -6% and food preparation at -1%, all other MDA/SDA products posted positive trends. CE categories were positive, too, with TVs gaining 3% and soundbars at +11%.

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



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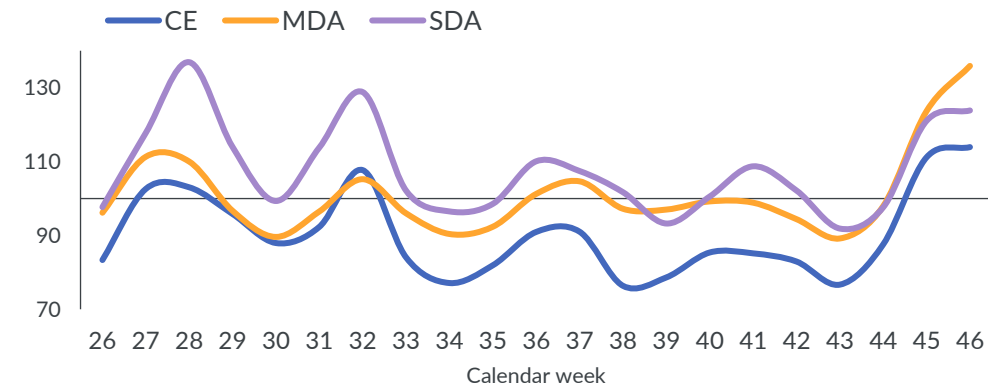
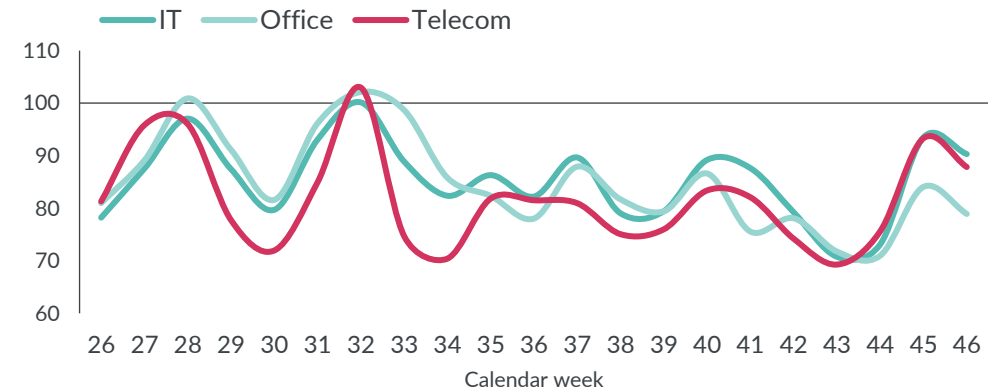
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Japan

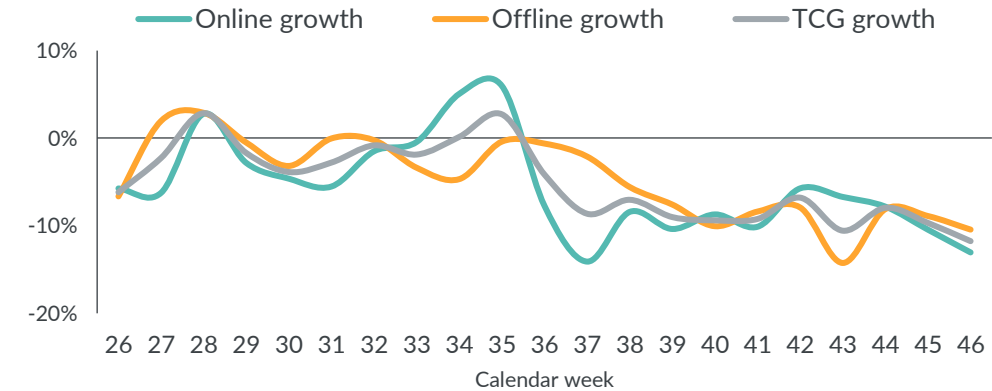
> Brazil

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 46 (Nov 13 – Nov 19)



- Deceleration of online sales (-13%) dragged the total TCG market down by -12%. Traditional retail added to it by delivering -10%.
- Within IT/Office products in week 46, media tablets at +14% were the best-performing category and laser printers claimed second place at +6%. Mobile computing at -10% marked the other end of the scale. Smartphones slumped at -13%.
- CE categories slumped as well, with TVs delivering -34% and audio home systems at -37%. The heatwaves in Brazil drove cooling to +38%. Hot beverage makers were flat.

Source: GfK Market Intelligence: Sales Tracking, Brazil; 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 – 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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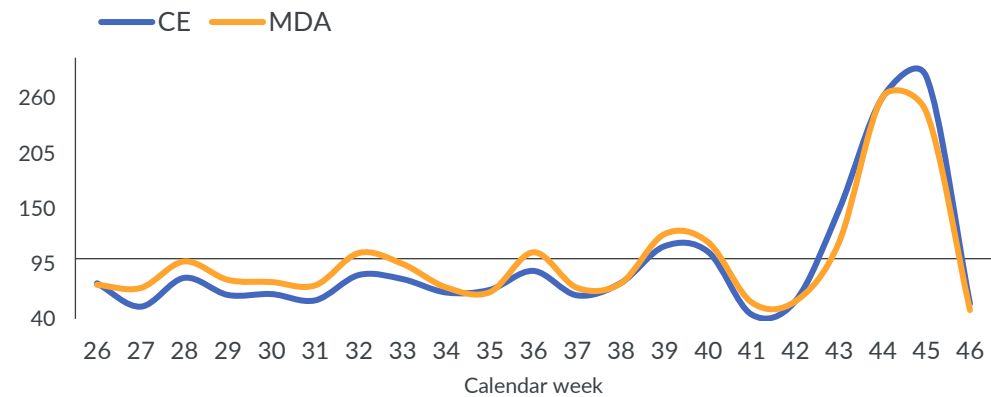
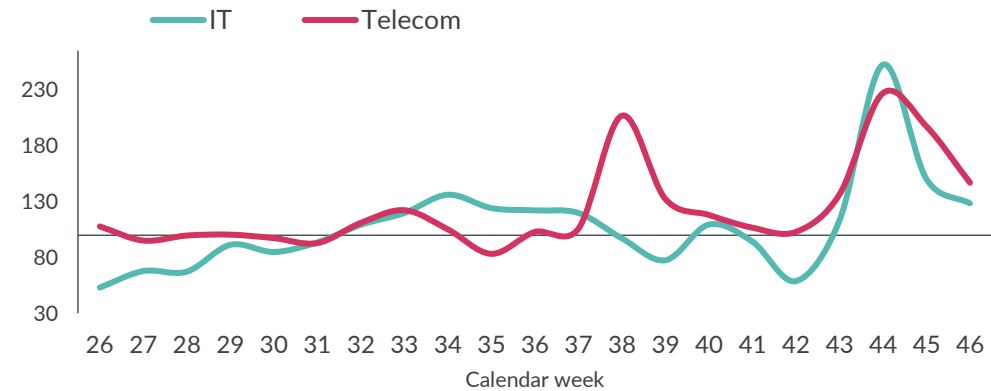
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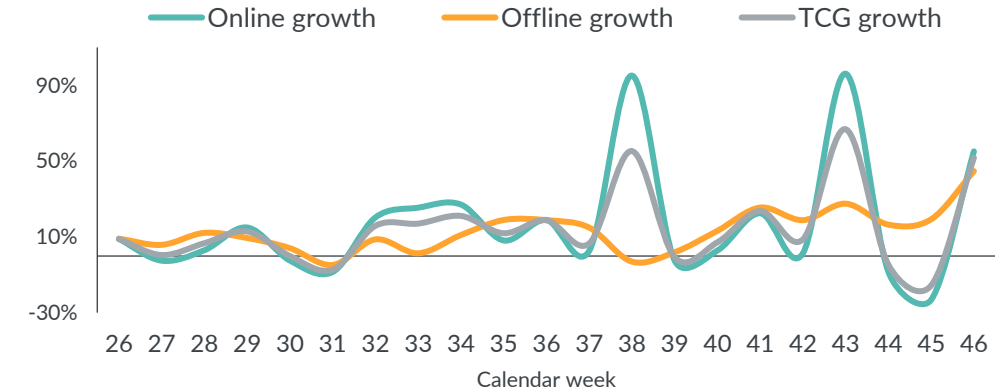
Brazil

➤ 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 46 (Nov 13 – Nov 19)



- The comparatively low baseline in week 46 of 2022 is the reason for extraordinary growth rates in the same week in 2023 when the total TCG market posted +52% YoY.
- Smartphones were the driving force of this development, accelerating at +88%. Mobile computing delivered a minus of 6%.
- Washing machines and cooling showed slight increases of 4%. TVs were down by 10%.

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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