



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 185
cw49/2023

Powered by **gfknewron**



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.

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.

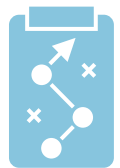
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Performance: Capacity as the enabler to deliver on the need for rich experience



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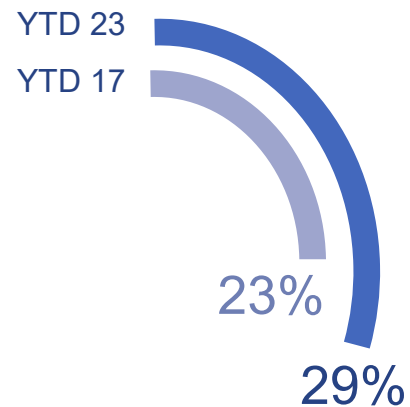


Refrigerators
>500l

Growth
rate vs
last year

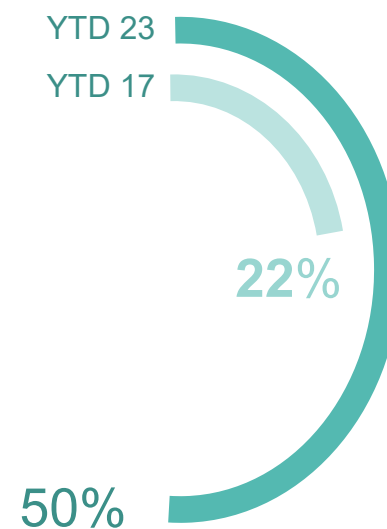
-7%

Value %



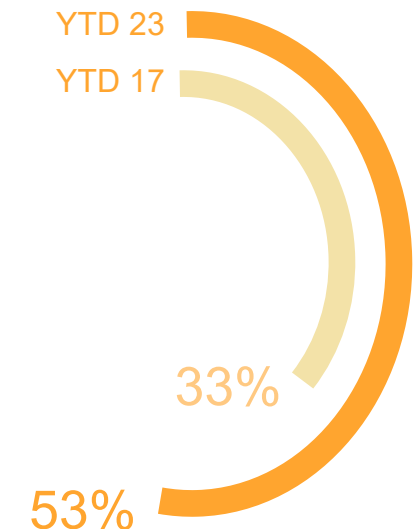
Washing
Machines >9kg

-4%



Cooking >70l

-6%



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

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France

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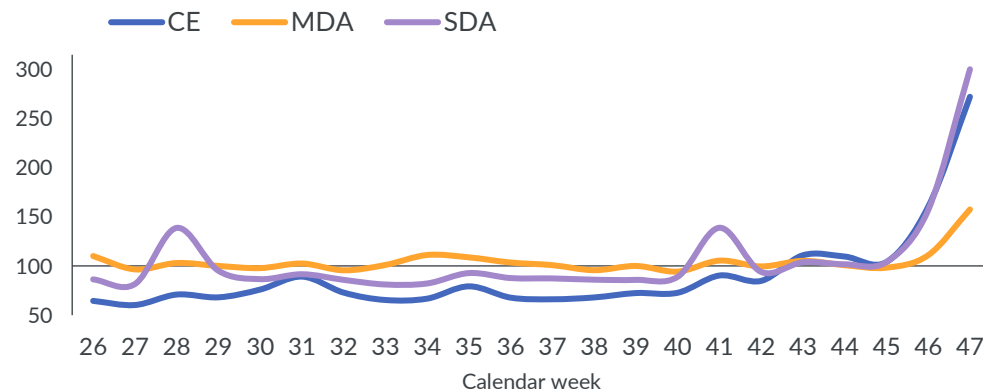
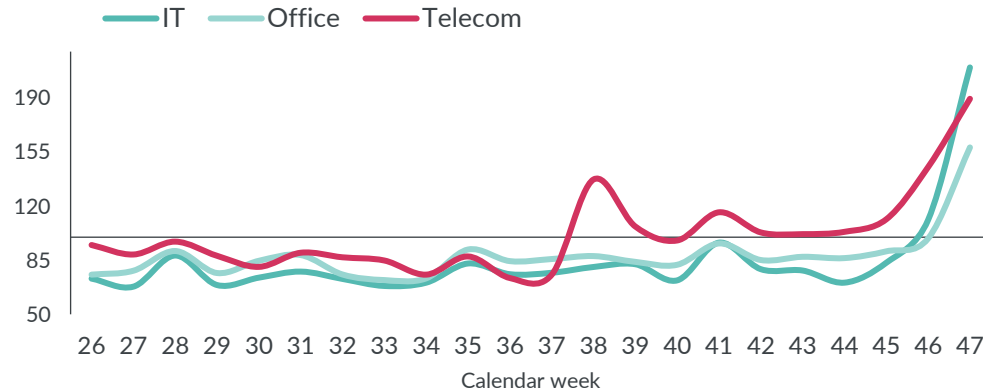
Spain

Japan

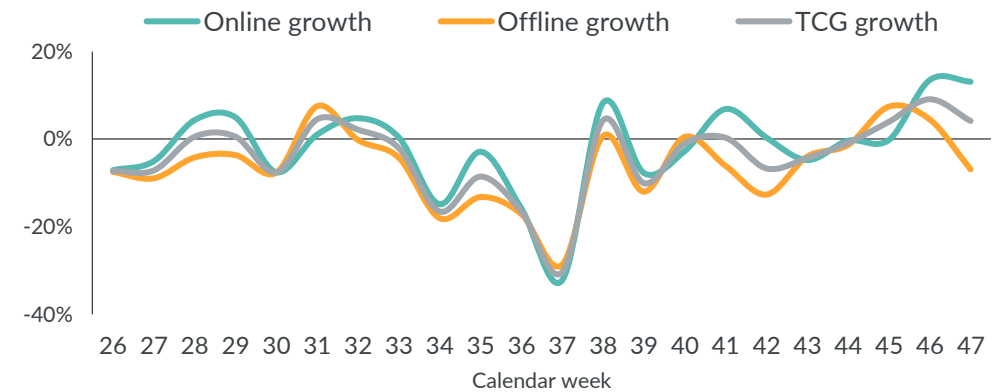
Brazil

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 47 (Nov 20 – Nov 26)



- In Black Friday week, online sales experienced a plus of 13% versus Black Friday week in 2022. Traditional retail lost 7%, leaving total TCG at a plus of 4%.
- Rates for IT/Office products ranged from +9% for monitors to -18% for mobile computing. Smartphones accelerated at +21%.
- The trends for MDA/SDA products ranged from between +40% for food preparation to +4% for cooling. CE product categories were double-digit negative with TV sales posting -18%.

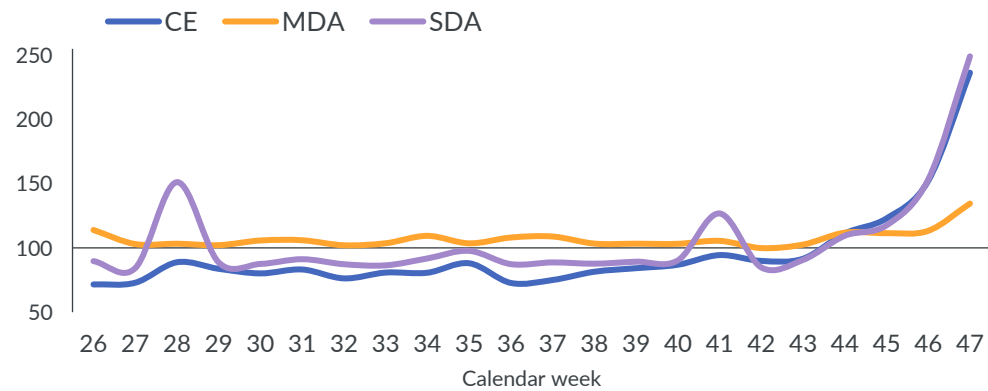
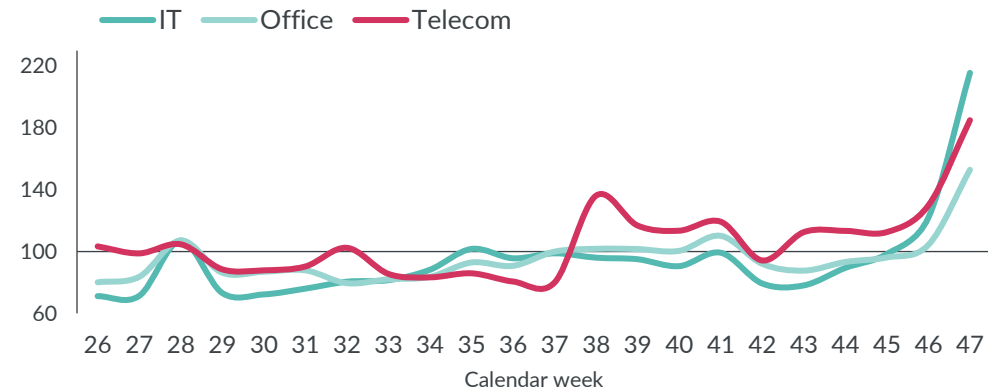
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

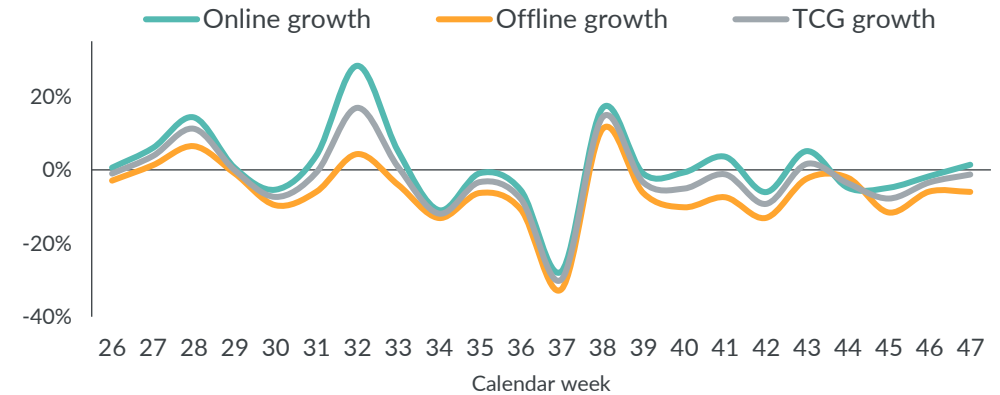


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- Fact of the week
- Germany
- > Great Britain**
- France
- Italy
- Spain
- Japan
- Brazil
- China

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 47 (Nov 20 – Nov 26)



- Traditional retail delivered -6%, but online sales at +1% failed to convert the total TCG market to positive growth, leaving it at -1%.
- The mixed picture for IT/Office products posted -17% for media tablets and +32% for mice. Only keyboards at +25% were similarly successful. Smartphones were weak at +4%, while headsets accelerated at +31%.
- In MDA/SDA, among mostly negative rates, dental care won 8%, hot beverage makers were up 5%, and shavers delivered +4%. Food preparation was flat. Audio home systems were the weakest product group in CE, posting -23%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2022 – 47 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

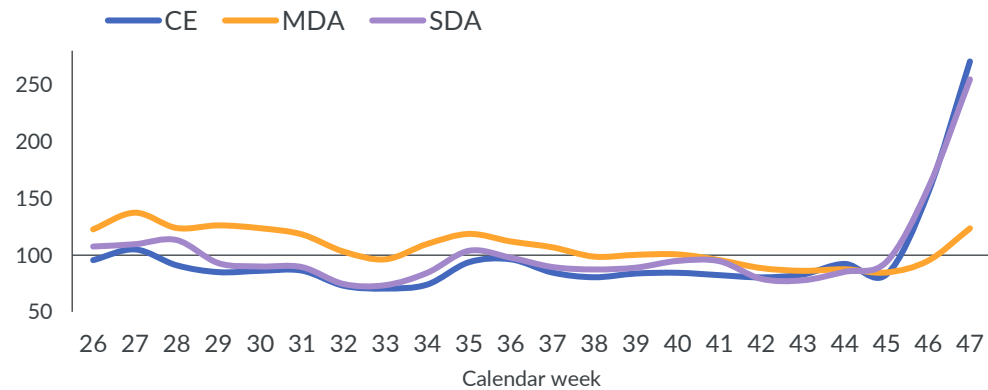
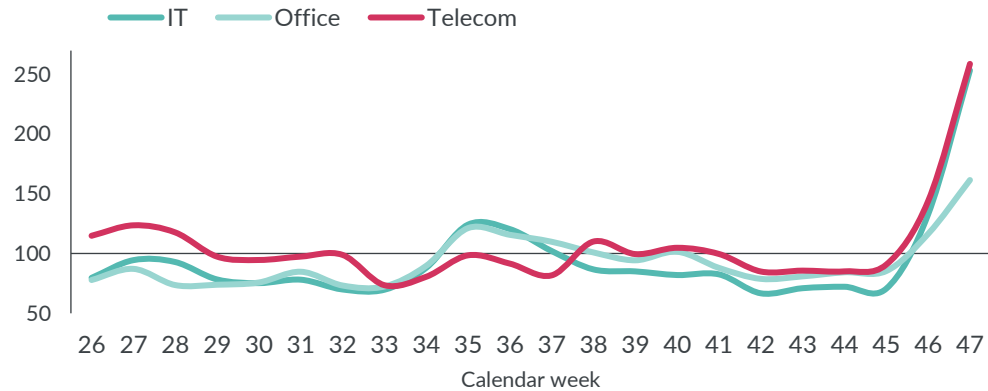
Spain

Japan

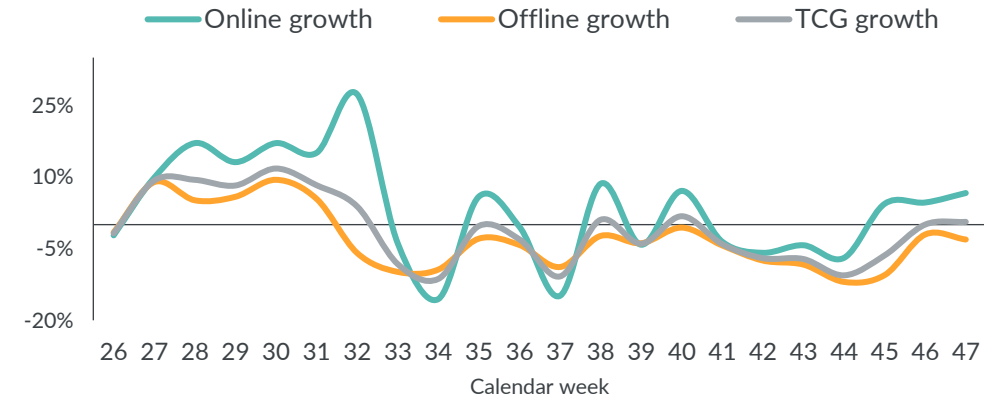
Brazil

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 47 (Nov 20 – Nov 26)



- Online sales experienced an uplift of 7% in week 47 but decreasing traditional retail (-3%) left the total TCG market at a weak +1%.
- IT/Office products ranged from +23% for monitors to -19% for desk computing. Smartphones accelerated at +13% and headsets were up 12%.
- The week saw an overall positive picture for SDA with air treatment (+31%) being the best-performing category. Only food preparation was down by 7%. For MDA, cooling and washing machines reported declines of 4% and 2% respectively. CE products were negative throughout with audio home systems at the end of the scale at -40%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2022 – 47 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

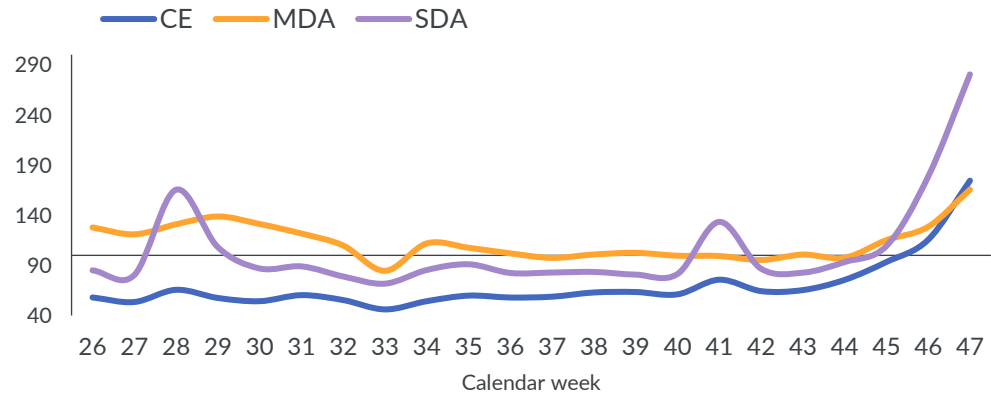
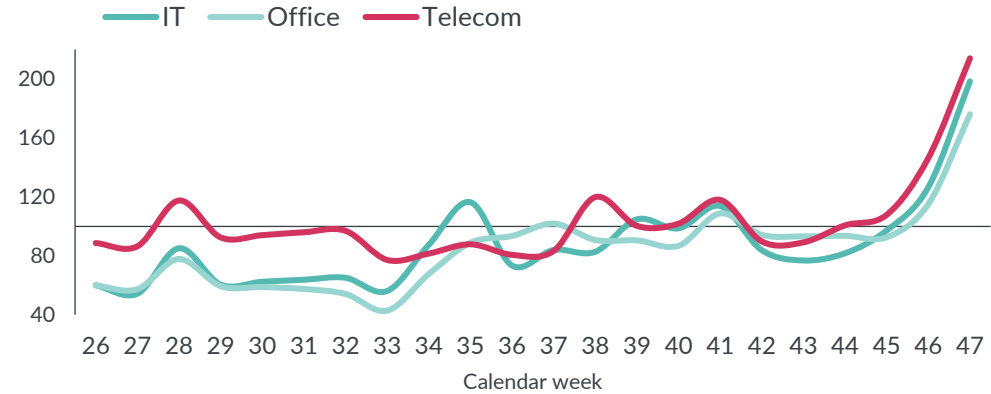
Spain

Japan

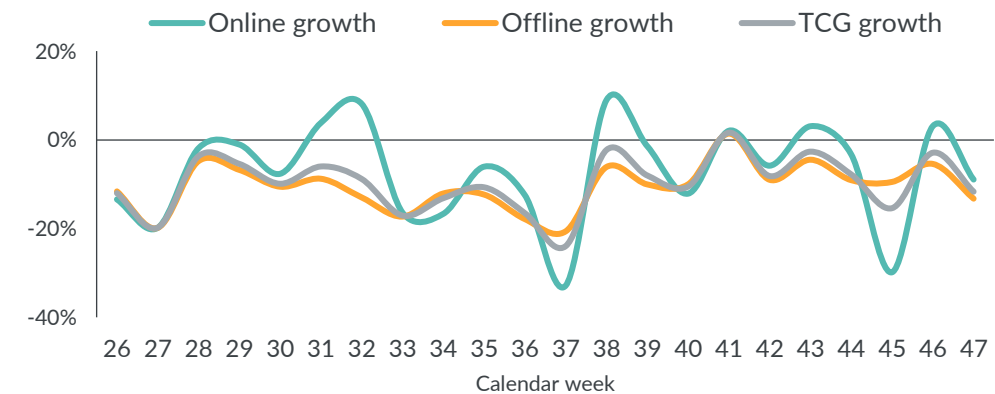
Brazil

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 47 (Nov 20 – Nov 26)



- The deceleration of traditional retail (-13%) dragged the total TCG market down by -12%. Online sales added to it by delivering -9%.
- Except for laser printers at +9%, all other IT/Office products decreased, led by mobile computing at -24% and desk computing claiming second place at -23%. Smartphones lagged at -3%.
- MDA/SDA/CE categories delivered negative trends throughout with CE products the worst performers, ranging from -14% for soundbars to -36% for audio home systems. MDA and SDA were less negative, scoring from -19% for food preparation to -1% for shavers.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2022 – 47 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

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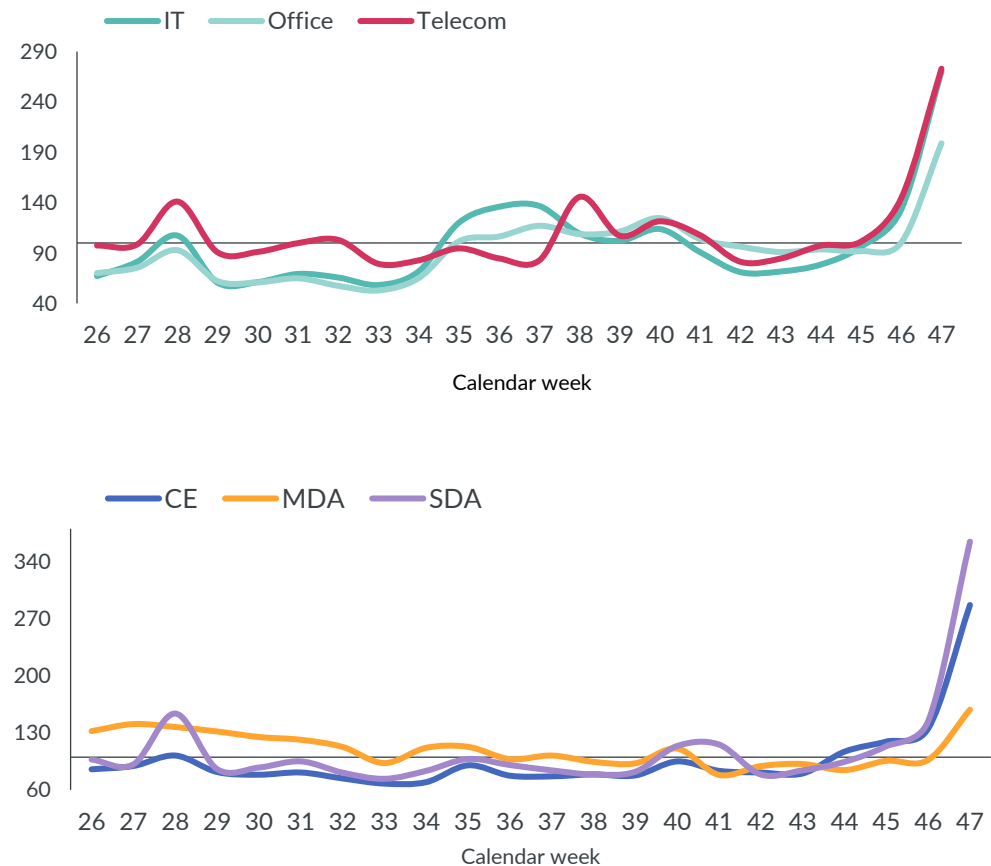
> Spain

Japan

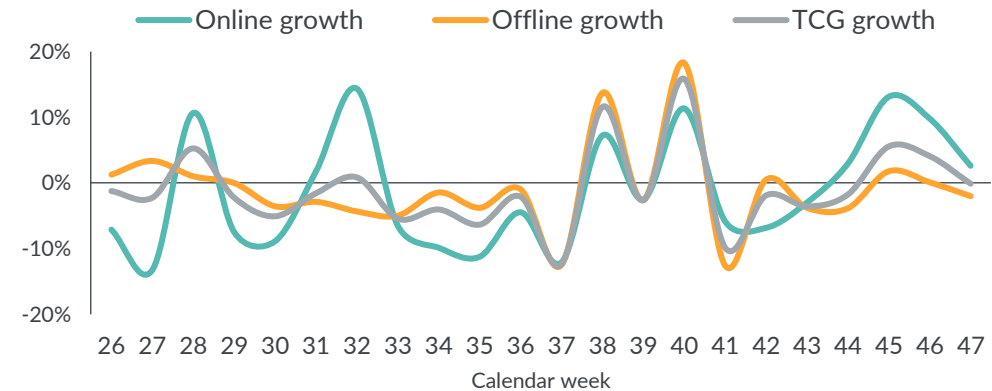
Brazil

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 47 (Nov 20 – Nov 26)



- Online sales (+3%) and traditional retail (-2%) delivered an opposing development to each other, which resulted in a flat total TCG market.
- While laser printers at +11% delivered a good performance, media tablets, desk computing and mobile computing slumped at -15%, -12%, and -11% respectively. Smartphones accelerated at +9%.
- Audio home systems again were the category hit most within CE categories, delivering -23% in week 47. While cooling was flat, all other MDA/SDA product groups reported growth between +7% for washing machines and +19% for vacuum cleaners.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2022 – 47 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**

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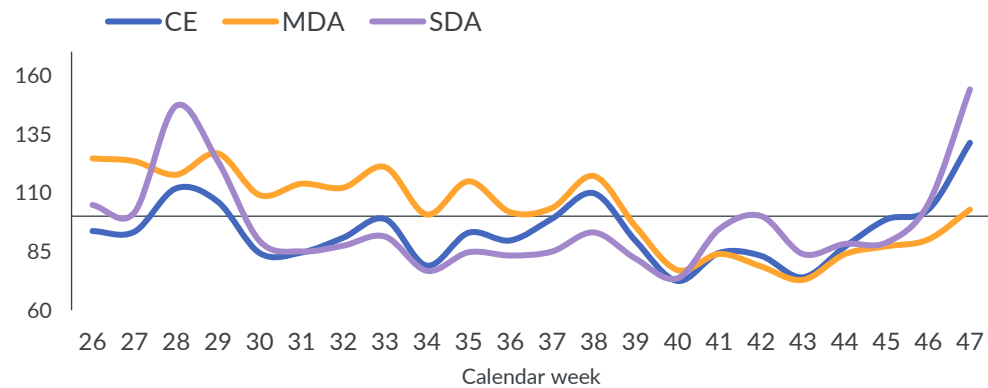
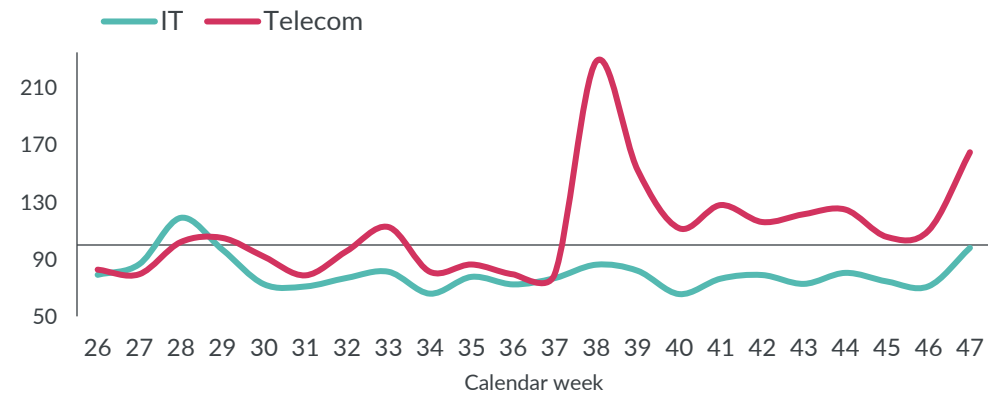
Spain

> Japan

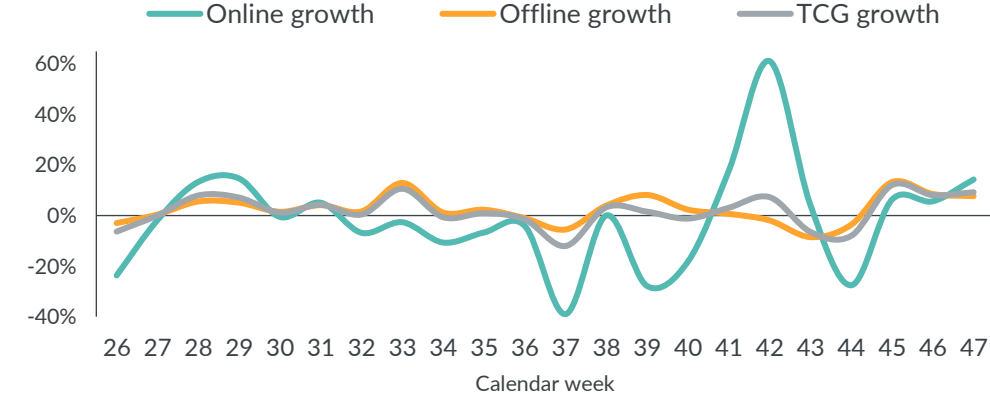
Brazil

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 47 (Nov 20 – Nov 26)



- The good results for online sales (+14%) pushed the total TCG market to +9%. Traditional retail added to it by delivering +8%.
- Mobile computing and media tablets both decelerated at -17% and -40% respectively. Both smartphones and headsets reported growth close to +40%.
- All in all, positive trends for MDA/SDA/CE products saw audio home systems in the lead at +51%. Dental care at +39% and air treatment at +36% delivered good results as well. This picture was clouded by soundbars at -14%. Food preparation was flat.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2022 – 47 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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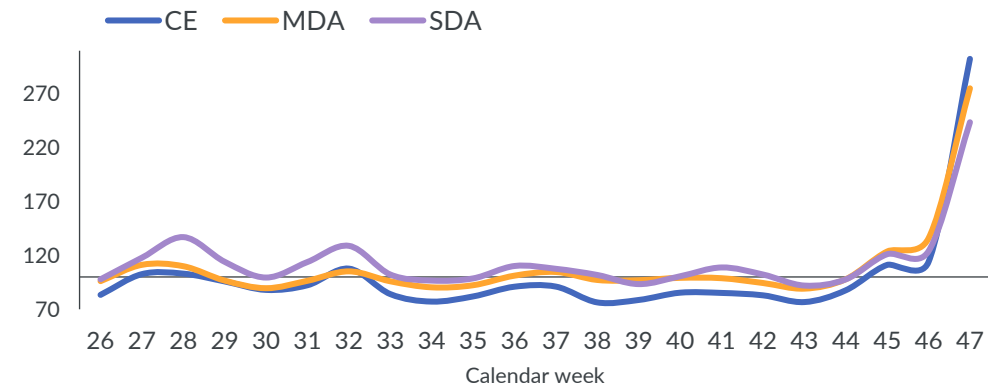
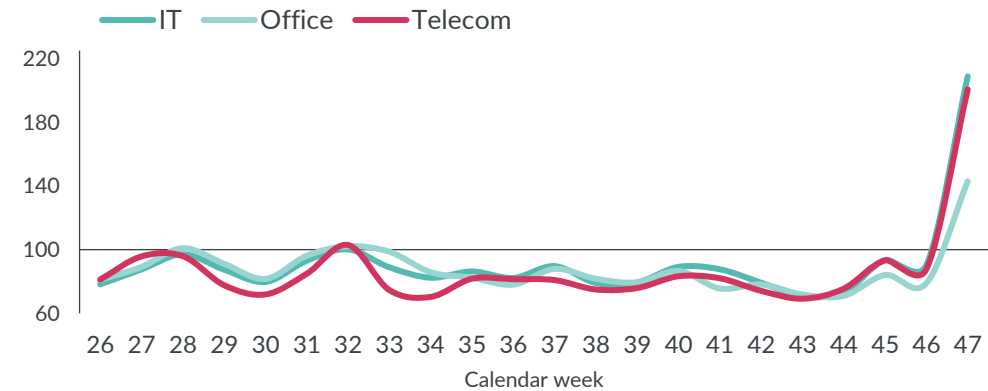
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Japan

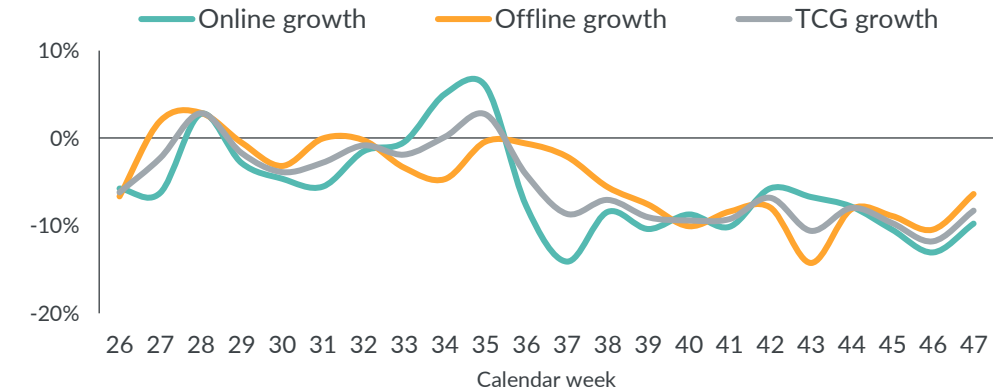
➤ Brazil

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 47 (Nov 20 – Nov 26)



- The Brazilian TCG market again delivered negative results (-8%), with online sales posting -10% and traditional retail reporting -6%.
- Media tablets at +25% were the best-performing category in week 47, while all other IT/Office categories posted negative trends, with mobile computing delivering -16%. Smartphones lagged at -11%.
- CE categories also slumped, with TVs delivering -18% and audio home systems at -9%. The heatwaves in Brazil drove cooling to +23%. Shavers at -10% marked the other end of the scale.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2022 – 47 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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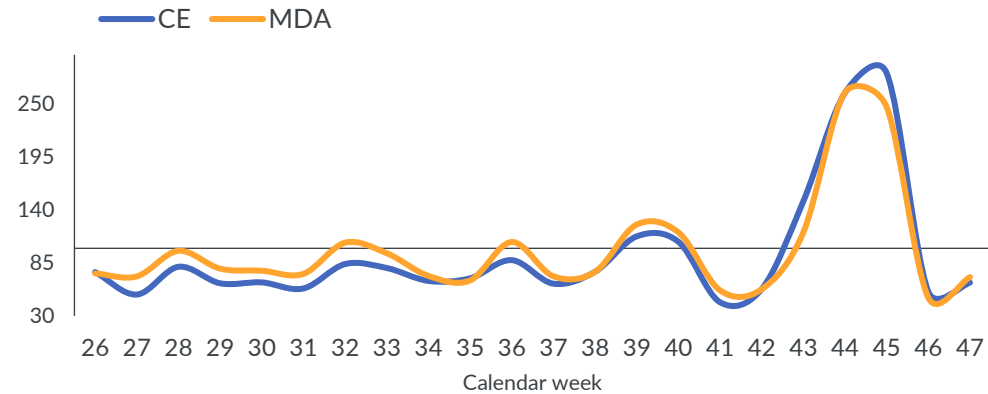
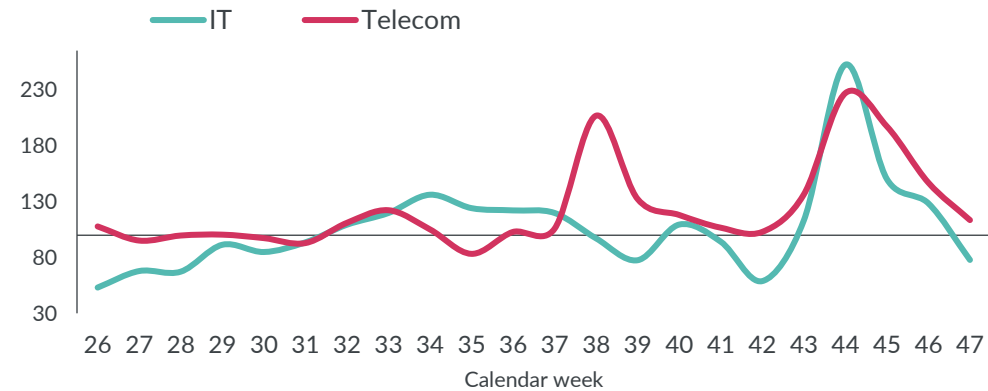
Spain

Japan

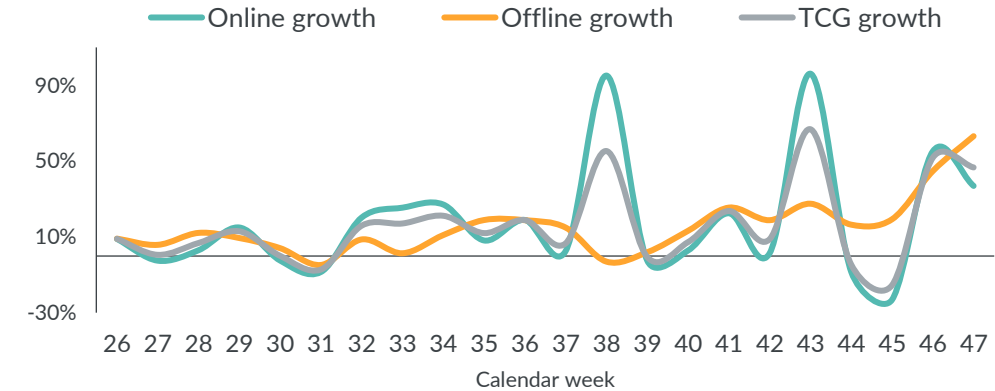
Brazil

➤ 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 47 (Nov 20 – Nov 26)



- Very good results for traditional retail (+63%) drove the total TCG market to a plus of 47%. Online sales added to it by delivering +37%.
- Smartphones were the driving force of this development, accelerating at +69%. Mobile computing was weak at +4%.
- Week 47 in 2023 saw a slight increase for washing machines (+4%) but cooling was down by 2% and TVs lost 3%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2022 – 47 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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