



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 210

Week 25 of 2024

Powered by **gfknewron**

Simplify your data analysis journey

Quick, comprehensive, and accessible business insights



> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China

In an era where market fluctuations are the norm, having a finger on the pulse of weekly changes is crucial. **gfknewron** offers more than just data; it provides clarity and direction in a sea of information so you can act based on the most current facts.

Accessible across your entire organization, **gfknewron** is a single point of truth for business-critical data. It distills complex market, consumer, and brand intelligence into a clear view of your performance within the market ensuring your strategies are robust and resilient.

gfknewron empowers you to transform insights into profitable actions, craft winning plans with confidence, and turn potential challenges into opportunities for growth.



Get instant access to crucial data to empower your decisions.



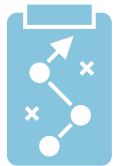
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- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
- **gfknewron Consumer** – Understand your shoppers, reach the right audience and maximize ROI
- **gfknewron Predict** – Forecast marketing potential, build the right strategies and optimize revenue

Fact of the Week

Depending upon affordability of consumer, pollution and energy prices in a region/country consumers opt for one of the categories.



About **gfknewron**

> Fact of the week

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France

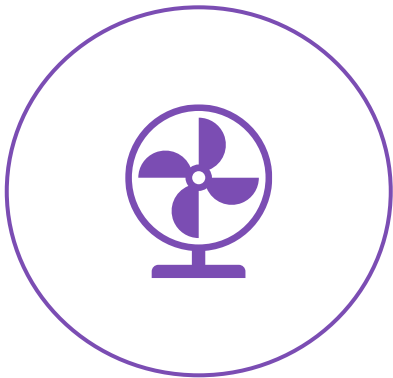
Italy

Spain

Japan

Brazil

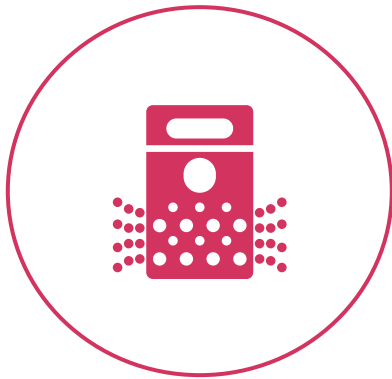
China



Electric Fans

Total
Electric Fans
41\$
Share: 100%

Smart
Electric Fans
95\$
Share: 1%



Air Treatment

Total
Air Treatment
123\$
Share: 100%

Air
Cooler
90\$
Share: 9%



Airconditioners

Total
Airconditioners
531\$
Share: 100%

Airconditioners
w. purification
545\$
Share: 73%

SDA as a sector has been more resilient than others. This is – among others – due to lower price point versus high ticket price items. The market is volatile and uncertain, but it also offers opportunities for growth and premiumization. We cannot stress enough on the need for innovation to continue the growth momentum in the SDA sector.

Weekly retail insights from the Point of Sale

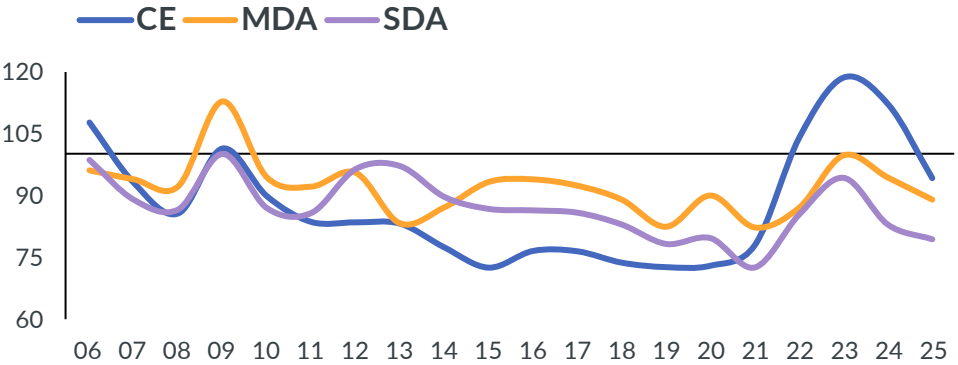
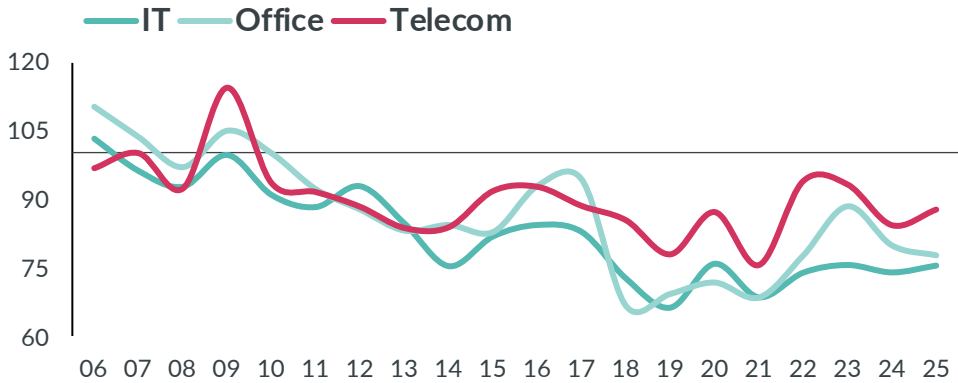
Spotlight on Germany



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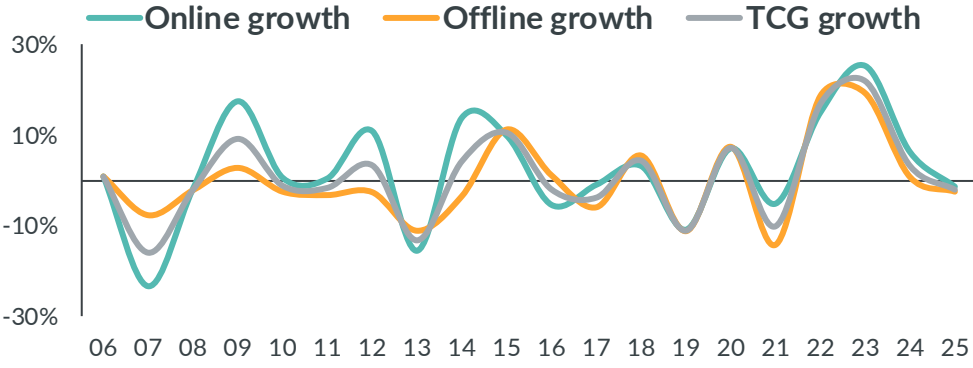
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

Index: 2023 average weekly turnover in EUR = 100



Please note: Below lines depict the sales growth rate vs same week of previous year.

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



Key take aways in calendar week 25 (Jun 17 - Jun 23)



- Close rates of -1% for online sales and -2% for traditional retail led to a downswing of 2% for the total TCG market.
- Except for monitors at +6%, all IT/Office and telecom products posted negative trends with mobile computing out in front at -15%. Smartphones lagged at -2%.
- The mixed picture for MDA/SDA saw dental care ahead at +22% and air treatment last at -63%. Washing machines were flat. Within CE, PTVs posted +46%. Audio home systems were weak at -5%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 25 2024; 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.

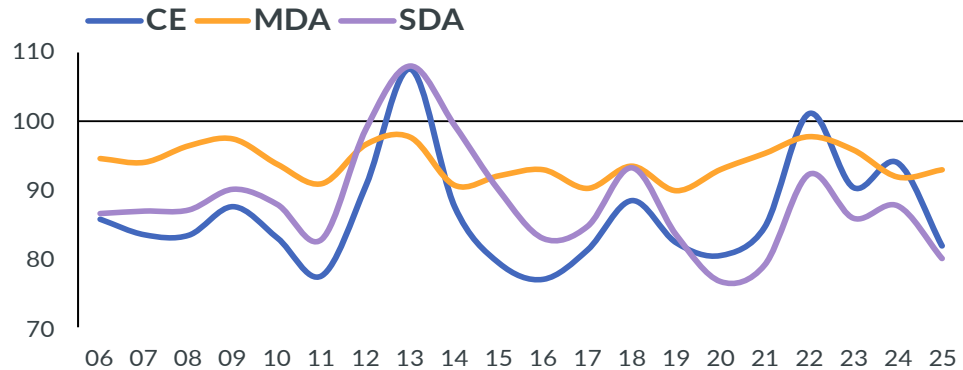
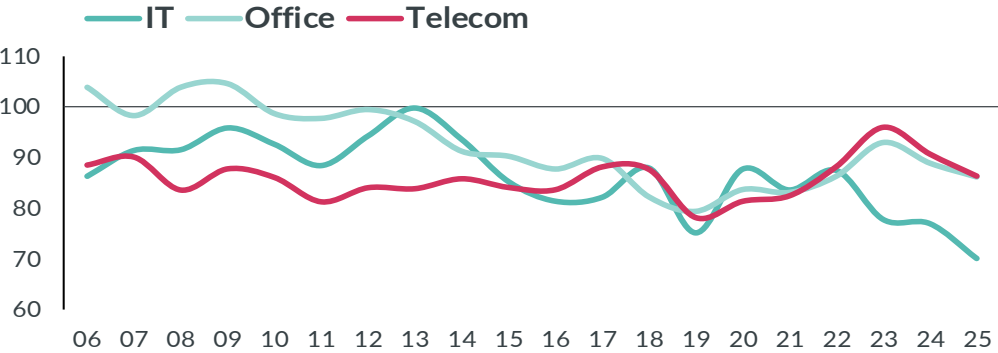
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

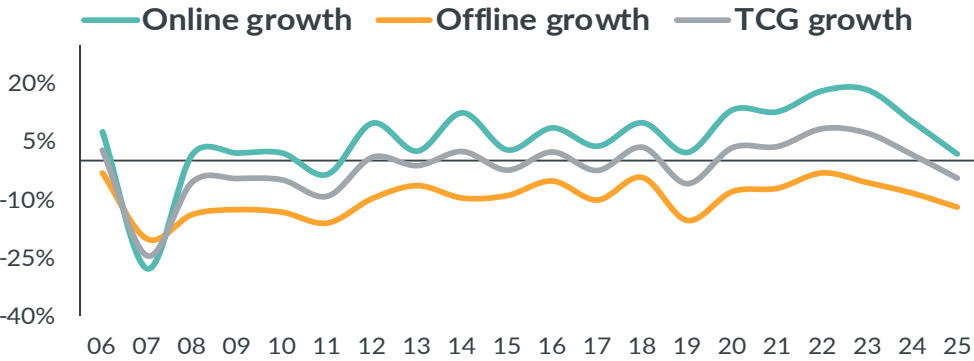


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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)

- Deceleration of traditional retail (-12%) dragged the total TCG market down by -5%. Online sales at a weak +2% failed to compensate.
- IT/Office products were led by peripherals. Mice grew at +18% and keyboards at +11%. Monitors were up 19%. Media tablets marked the other end of the scale at -18%. Smartphones decelerated at -10%.
- Except for cooling (-21%) and vacuum cleaners (-4%), all MDA, SDA and Consumer Electronics categories grew. The best-performing category in week 25 was hot beverage makers at +21%. PTVs were up 18%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 25 2024; 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

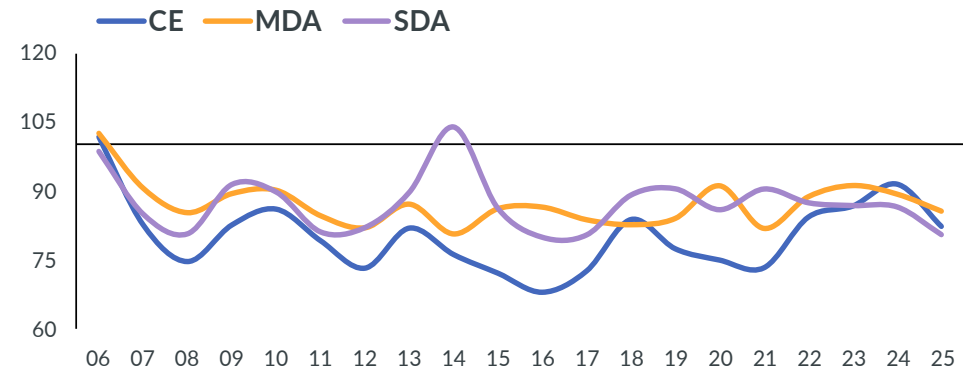
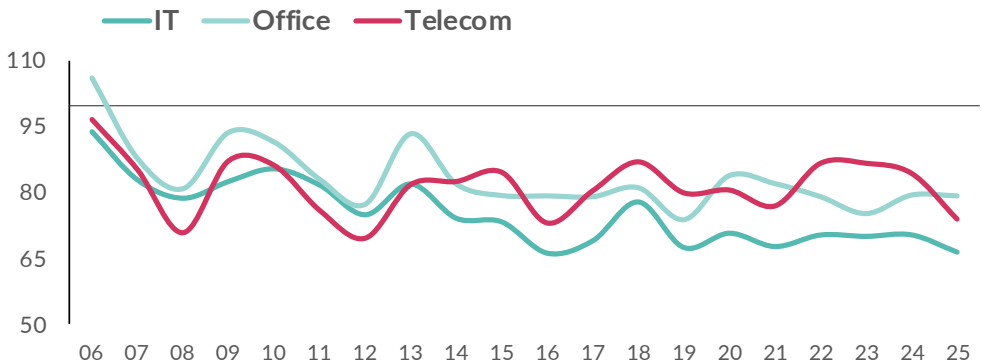
Spain

Japan

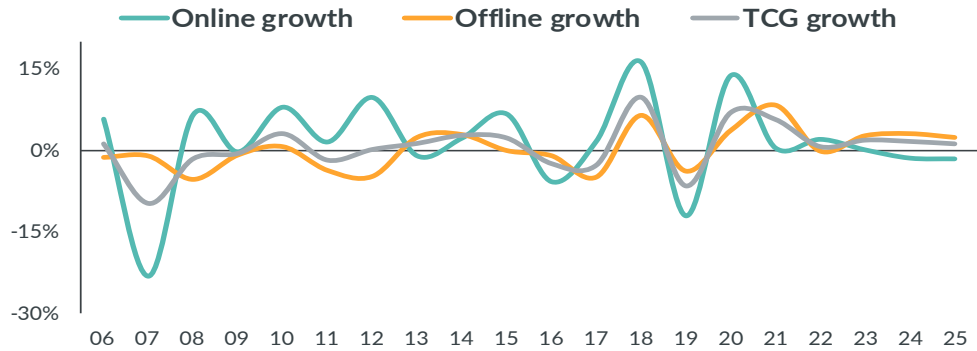
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)



- Online sales (-2%) and traditional retail (+2%) delivered an opposing development to each other, which resulted in +1% for the total TCG market.
- Week 25 saw strong results for laser printers at +41%. Inkjet printers at +13% claimed second place within IT/Office products. Mobile computing was weak at -4%. Smartphones slumped at -13%.
- In week 25, dental care stood out in MDA/SDA products at +101%. At the other end of the scale, air treatment posted -74%. Except for audio home systems at -3%, the other CE categories delivered good growth with soundbars in the lead at +54%. PTVs posted +38%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 25 2024; 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

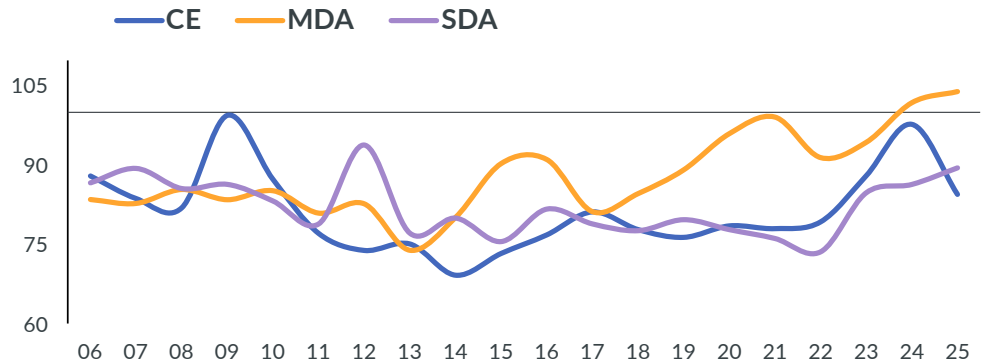
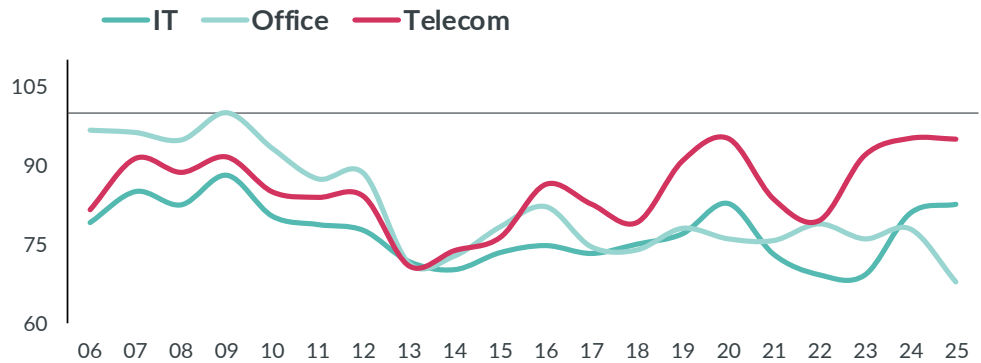
Spain

Japan

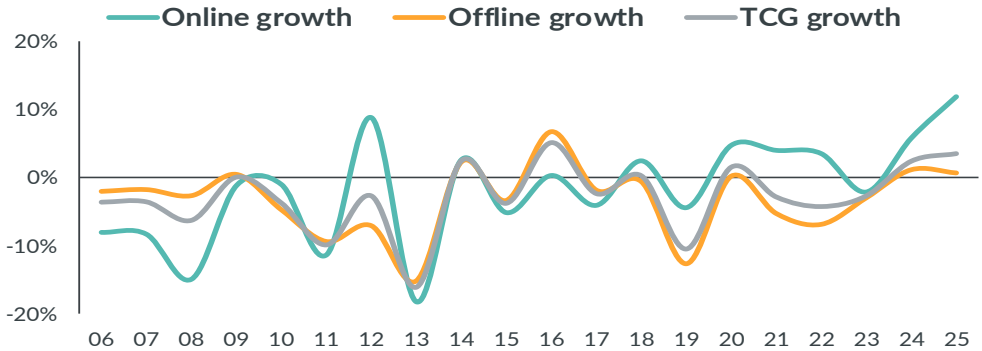
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)



- Acceleration of online sales (+12%) lifted the total TCG market but its growth rate of +4% was impacted by just +1% for traditional retail.
- The best-performing category in week 25 was media tablets at +56%. Inkjet printers at -15% marked the other end of the scale within IT/Office products. Smartphones experienced an uplift of 4%.
- Week 25 saw a mixed picture for MDA/SDA categories with dental care in the lead at +27% and air treatment decelerating by 26%. While audio home systems lost 17%, PTVs gained 11% and soundbars were up 12%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 25 2024; 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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Italy

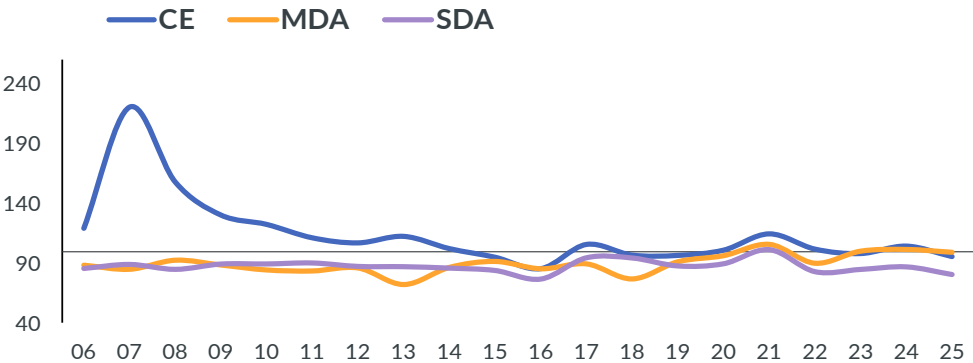
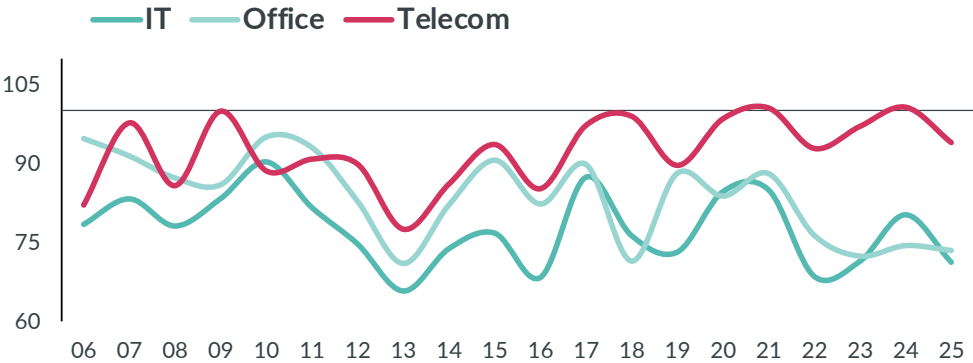
> Spain

Japan

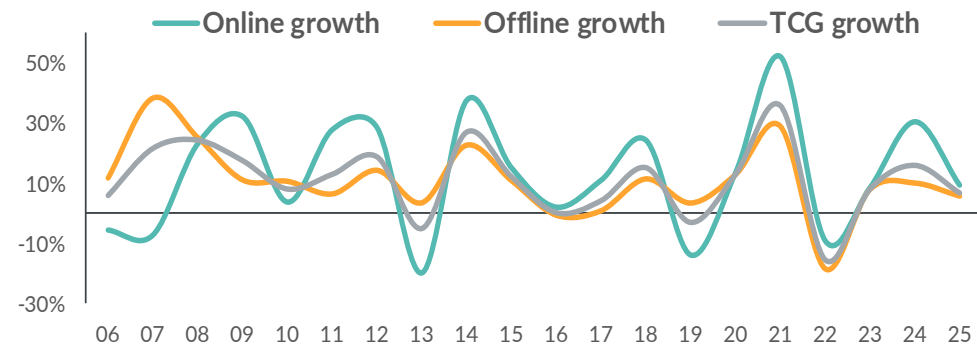
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)

- Growth of 9% for online sales (+30% in the previous week) and 6% for traditional retail (+10% in the previous week) led to an average of 7% for the total TCG market, down from +16% in week 24.
- All IT/Office categories delivered growth, led by media tablets at +38%. Mobile computing and inkjet printers were weak at +2%. Smartphones experienced a slight uptick of 3%.
- In week 25, cooling brought up the rear in MDA/SDA products, at -12%. Hot beverage makers at +21% marked the other end of the scale. While audio home systems at -17% did not perform well, TVs gained 32%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 25 2024 (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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Fact of the week

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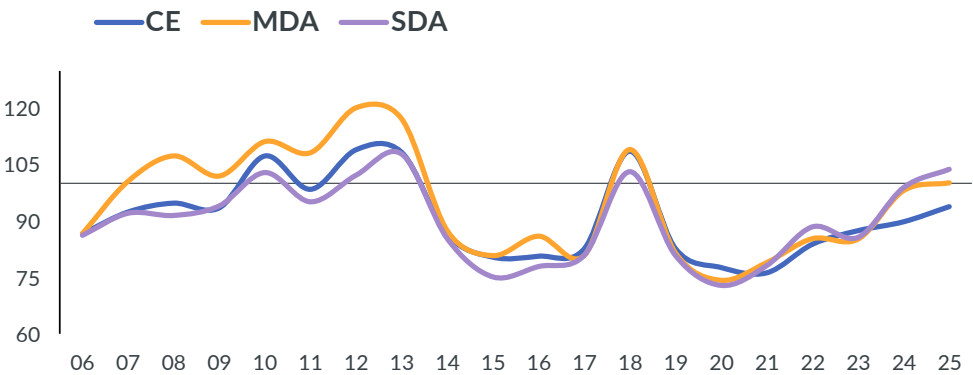
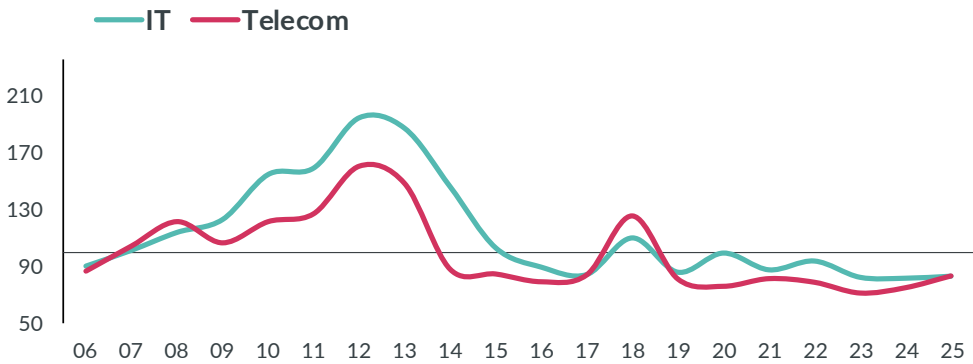
Spain

> Japan

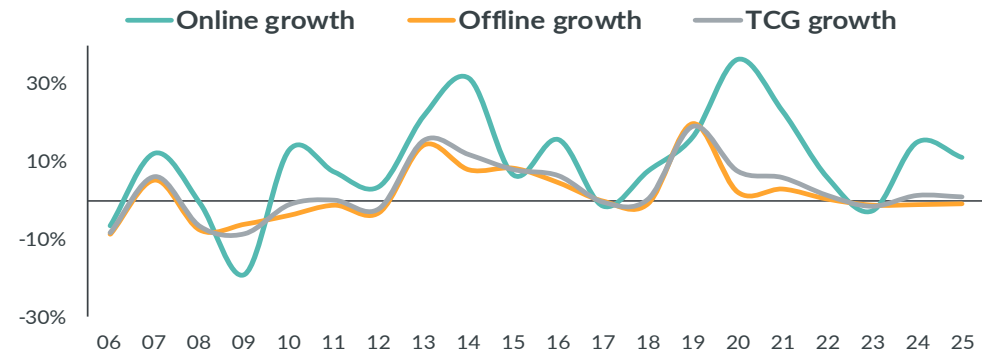
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)



- Traditional retail delivered a decline of 1%. Online sales posted a plus of 11% but due to its small share compared to traditional retail, the impact on total TCG was small, leaving it at a slight +1%.
- Week 25 delivered a good, double-digit development for IT and telecom products with media tablets in the lead at +30% and smartphones at +15%.
- CE categories saw slight ups and downs. TVs posted +3%. In a mixed picture for MDA/SDA, food preparation and dental care led at +16%. Air treatment recovered from -30% in week 24 to a slight +1% in week 25.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 25 2024; 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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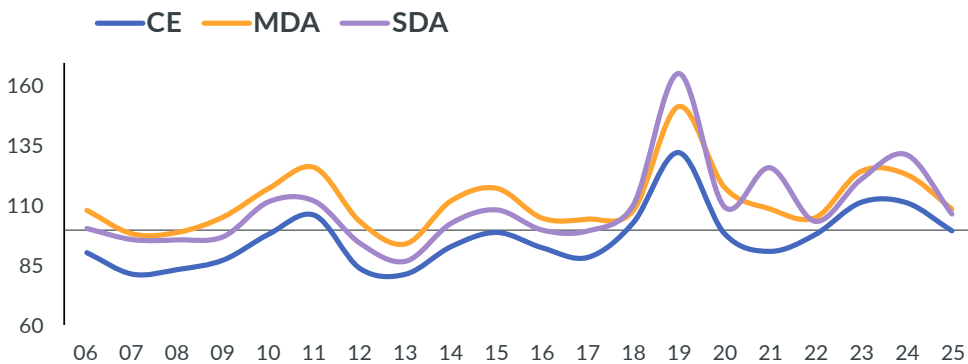
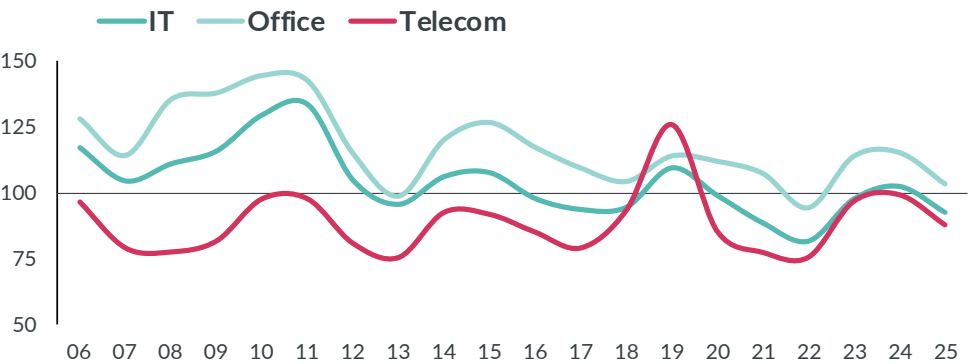
Spain

Japan

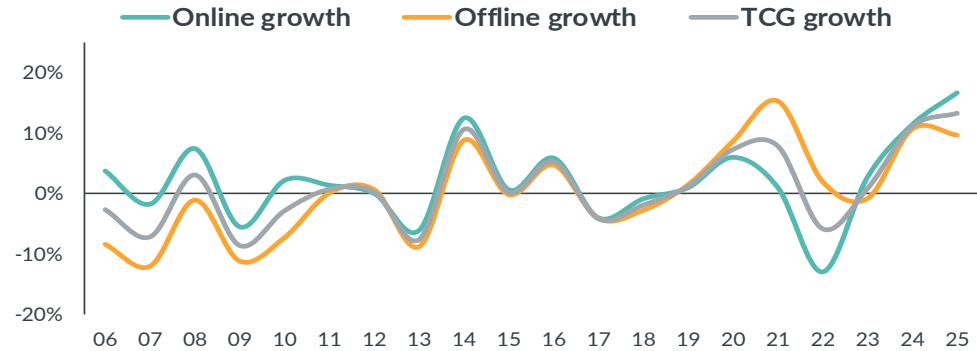
➤ Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)

- Acceleration of online sales of +17% and an uplift of 10% for the traditional retail led to a plus of 13% for the total TCG market.
- For the first time in a long time, there were double-digit growth rates for all IT/Office categories with inkjet printers in the lead at +23%. Smartphones experienced a slight uptick of 3%.
- There was double-digit growth for all MDA/SDA/CE products. Week 25 saw audio home systems and cooling in front at +35%. Vacuum cleaners claimed second place at +32%. Shavers were the least successful, at +10%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 25 2024; 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



About **gfknewron**

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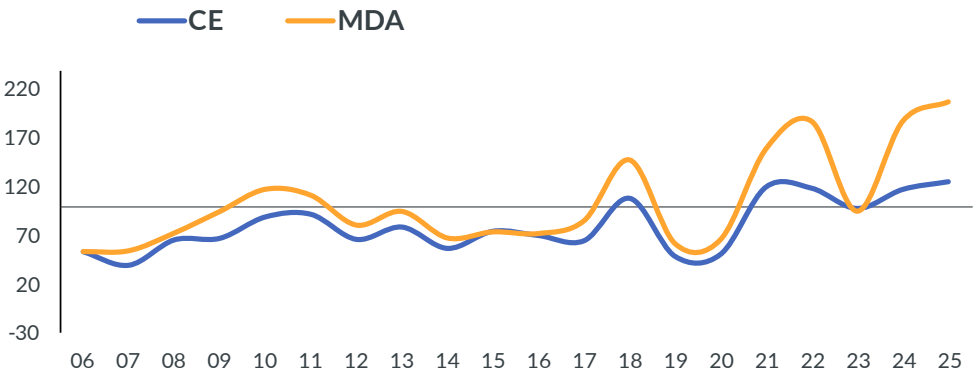
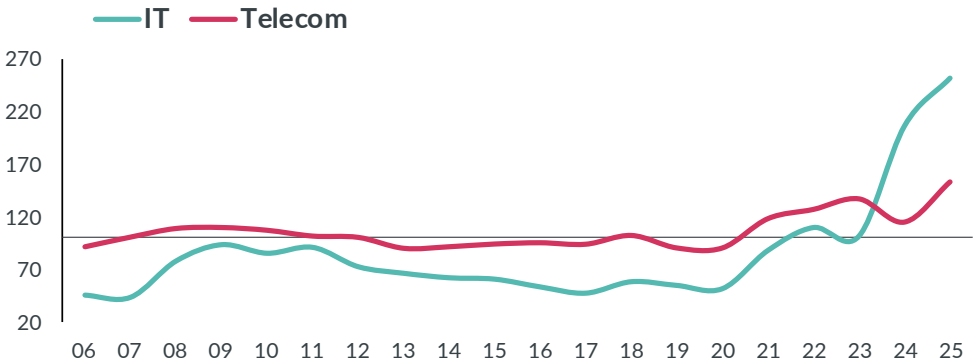
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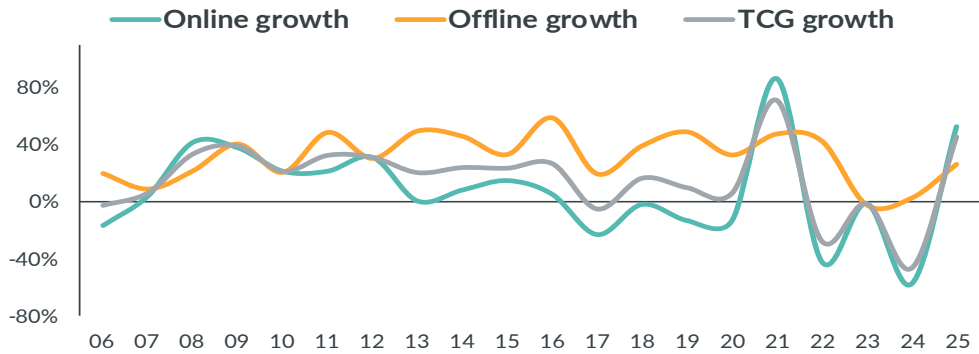
Brazil

➤ China

Index: 2023 average weekly turnover in EUR = 100*



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



Key take aways in calendar week 25 (Jun 17 – Jun 23)



- Strong growth rates for both traditional retail at +26% and online sales at +53% delivered a solid plus of 45% for the total TCG market. Week 25 in 2024 was the last week of the Chinese 618 shopping festival while in 2023 it ended on the last day of Week 24.
- While mobile computing was the weakest of the categories, growing just 14%, smartphones accelerated at +41%.
- The last week of the shopping festival brought extraordinary growth to MDA categories, with an increase of 118% for cooling and 111% for washing machines. PTVs were just a little behind, at +97%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 25 2024; 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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