



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 212

Week 27 of 2024

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Quick, comprehensive, and accessible business insights



> About **gfknewron**

Fact of the week

Germany

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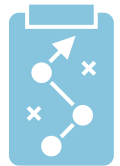
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- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
- **gfknewron Consumer** – Understand your shoppers, reach the right audience and maximize ROI
- **gfknewron Predict** – Forecast marketing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

Fact of the Week

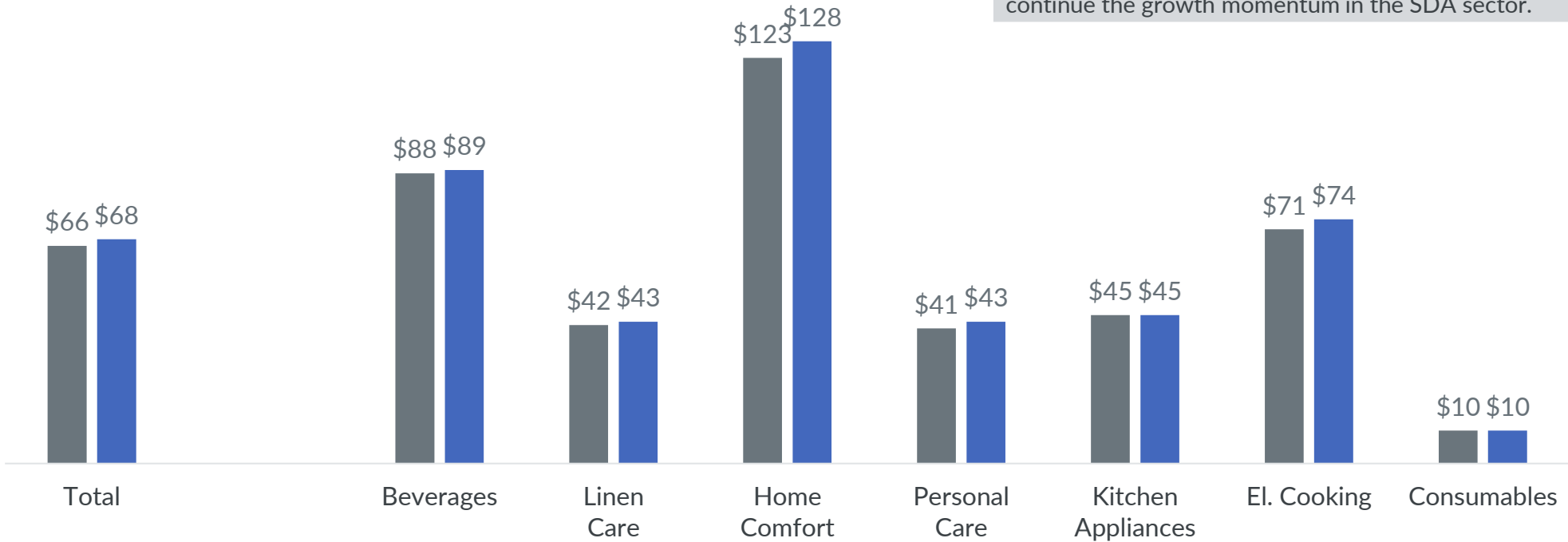
Prices are increasing for all segments except for Kitchen Appliances & Consumables



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SDA Total - Price USD

■ 2022 ■ 2023



SDA as a sector has been more resilient than others. This is – among other reasons – 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.

Source: Market Intelligence Sales Tracking; Jan 22-Dec 23; Global ex NA
Beverages: Draught Sys/Hot Beverage Makers/Kettles/Milk Frother/Sodamaker/Water Filter/Coffee Grinders; Linen Care: Garment Steamer/Irons; Home Comfort: Air treatment/El. Heating/El. Fans/Exhaust Fans/Vacuum Cleaners/Window Cleaners/Steam Cleaners; Personal Care: Hair Clippers/Hair Dryers/Hair Stylers/Personal Scales/Shavers/Light Therapy/Blood Pressure Monitors/Dental Care/Digital Thermometers, Shaver Accessories/El. Cosmetics/El. Stimulation; Kitchen Appliances: Food Preparation/Juicers/Presses/Kitchen Scales/Meat Miners/Vacuum Pack Sys.; El. Cooking: Bread Makers/Fryers/Egg Cookers/Food Steamers/Fun Cooking/Mini Ovens/Rice Cookers/Sandwich Waffle Grill/Toaster/El. Cooking Pots; Consumables: Vacuum Cleaner Bags/Hot Beverage Capsules and Pads

Weekly retail insights from the Point of Sale

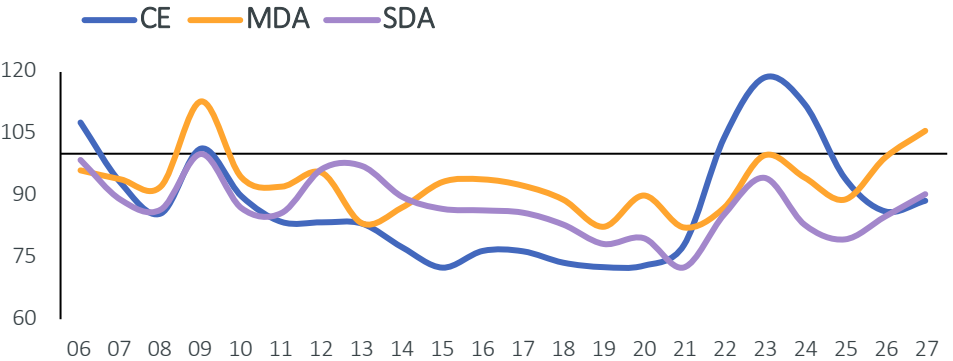
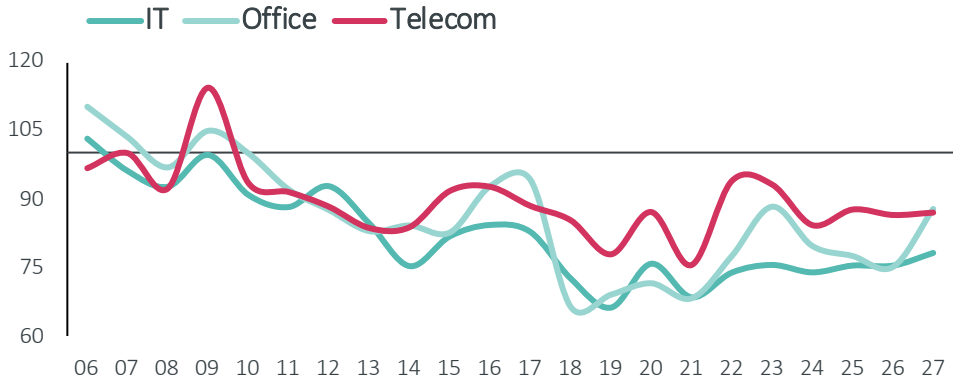
Spotlight on Germany



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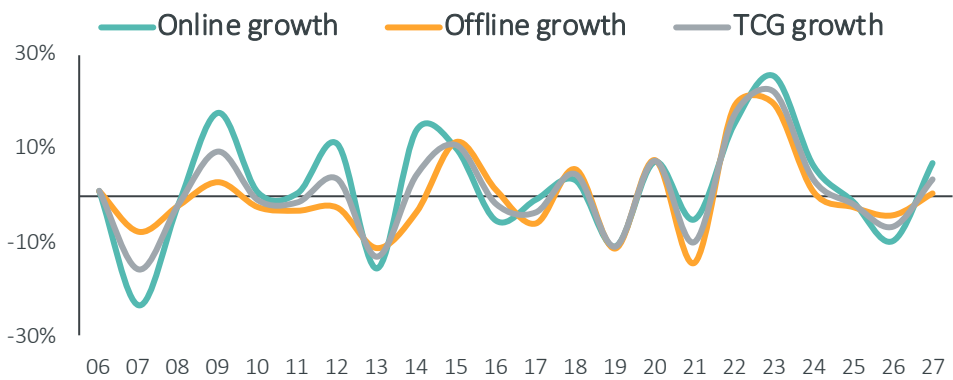
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 27 (Jul 01 – Jul 07)



- While traditional retail was flat, online sales at +7% lifted the total TCG market by 3%.
- IT/Office and telecom products experienced moderate ups and downs with monitors and laser printers at +3% at one end of the scale and mobile computing at -6% at the other.
- Food preparation was the only product group with a negative trend in MDA/SDA in week 27, at -15%. All other product groups experienced upswings with air treatment in the lead at +36% and dental care next at +24%. PTVs at +34% delivered another strong result.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 27 2024; 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.

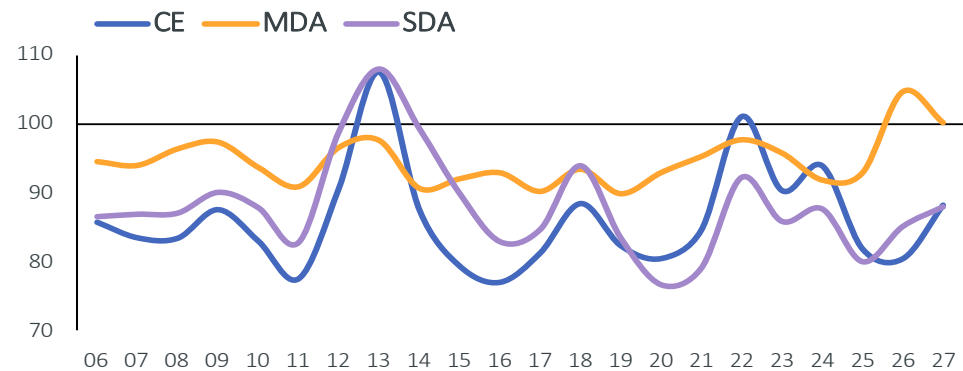
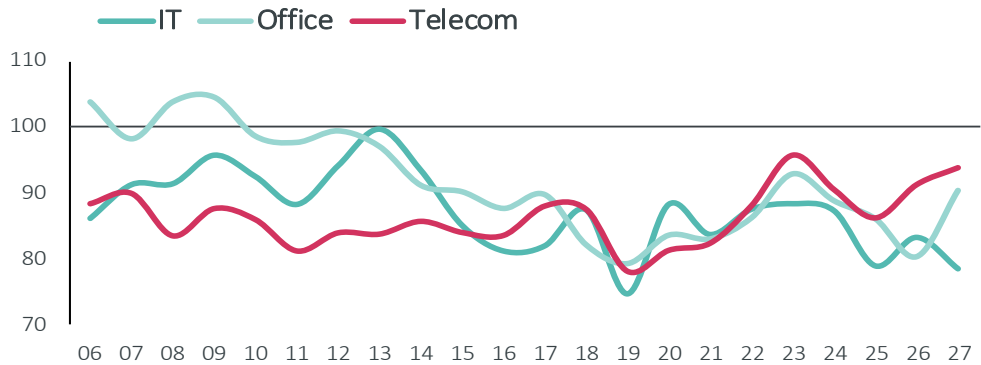
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

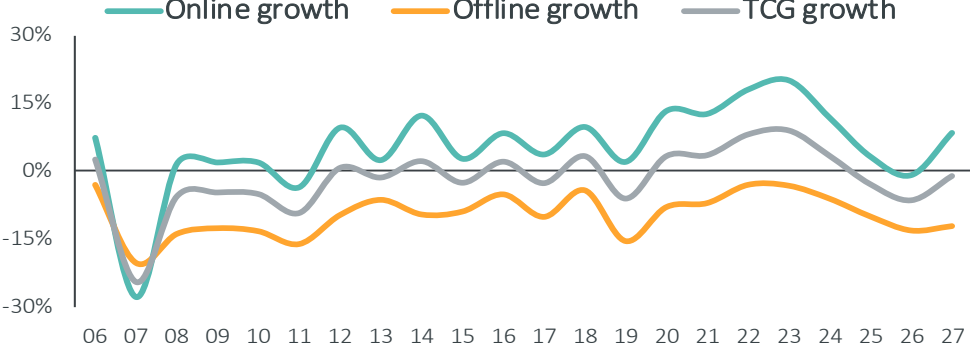


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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 27 (Jul 01 - Jul 07)

- Deceleration of traditional retail (-12%) dragged the total TCG market down by -1%. Online sales at +9% were unable to compensate.
- IT/Office products were led by peripherals (mice and keyboards) which grew at +13% and monitors which posted +21%. Media tablets marked the other end of the scale, at -19%. Smartphones decelerated at -4%.
- Hot beverage makers (+16%) and food preparation (+12%) were the best-performing categories in MDA and SDA. All others grew moderately in single digits except cooling at -5%. PTVs were up 10% and soundbars gained 5%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 - 27 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

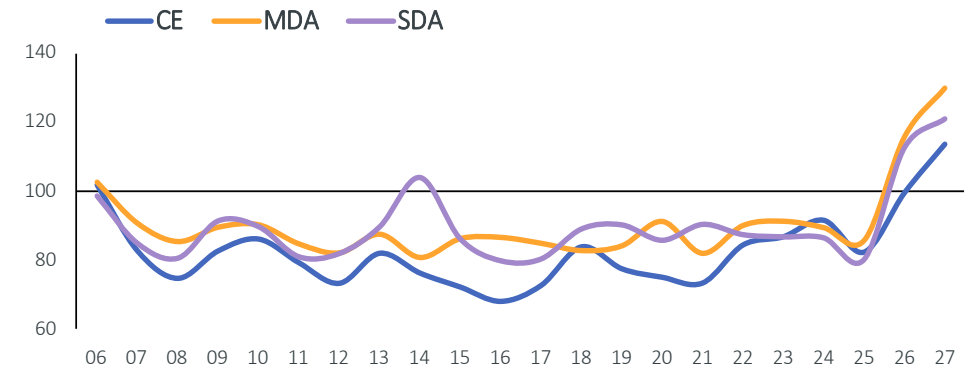
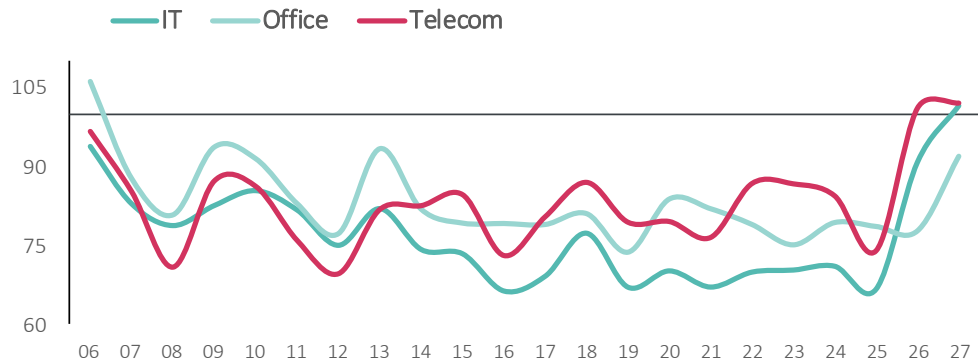
Weekly retail insights from the Point of Sale

Spotlight on France



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



Key take aways in calendar week 27 (Jul 01 - Jul 07)



- Online sales at -10% dragged the total TCG market down by 4%. Traditional retail increased the fall with a downswing of 1%.
- Week 27 saw declines across IT/Office products except for media tablets at +14% and monitors at a slight +1%. Laser printers at -17% were the worst-performing category. Smartphones slumped at -19%.
- In week 27, air treatment stood out in MDA/SDA products, at -27%. Cooling claimed second place at -12% and dental care came in third at -6%. All others delivered upswings with vacuum cleaners in the lead at +21%. TVs experienced a good plus of 10%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 - 27 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



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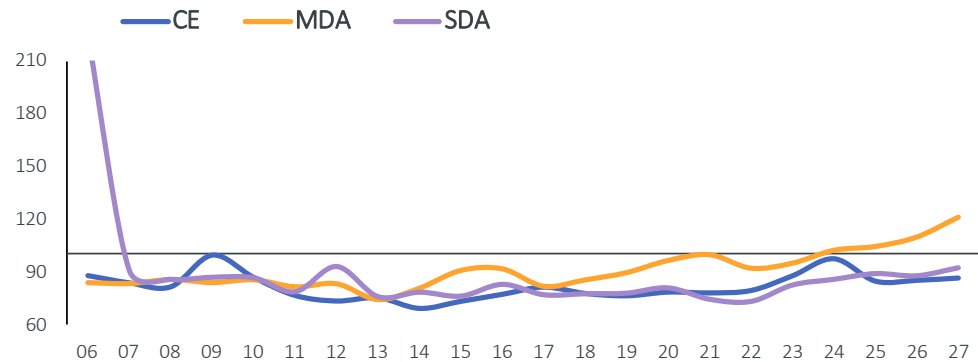
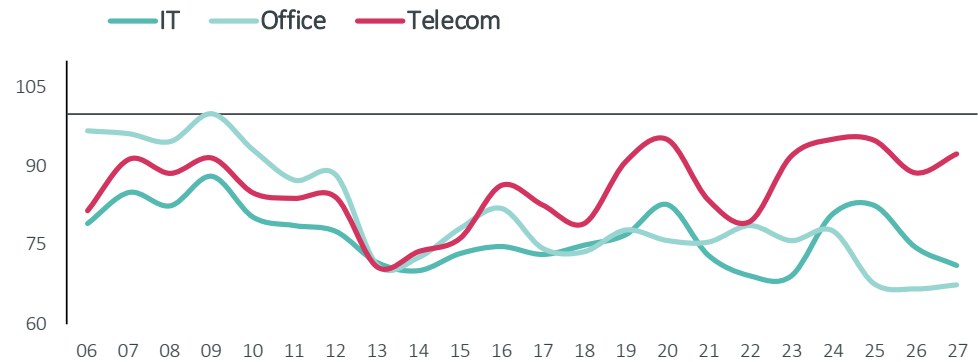
Spain

Japan

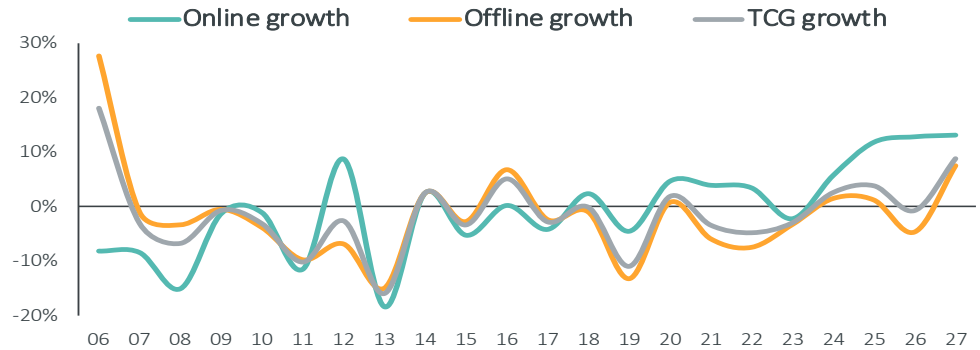
Brazil

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 27 (Jul 01 - Jul 07)



- With online sales accelerating at +13% and traditional retail gaining 8%, the total TCG market closed week 27 at +9%.
- All IT/Office and telecom products saw positive trends, ranging from +1% for inkjet printers to +19% for media tablets. Smartphones increased by 7%.
- In week 27, dental care took the lead at +54%, and hot beverage makers claimed second place at +19%. The other MDA and SDA categories also posted positive trends except for cooling at -1%. PTVs accelerated at +15% while audio home systems decelerated at -9%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 - 27 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



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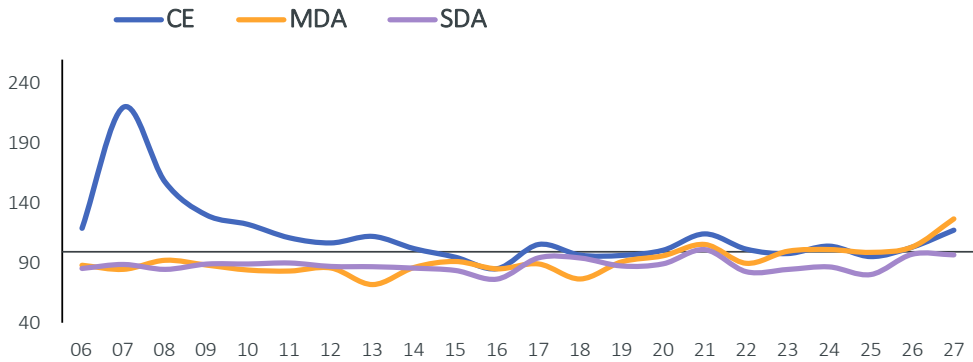
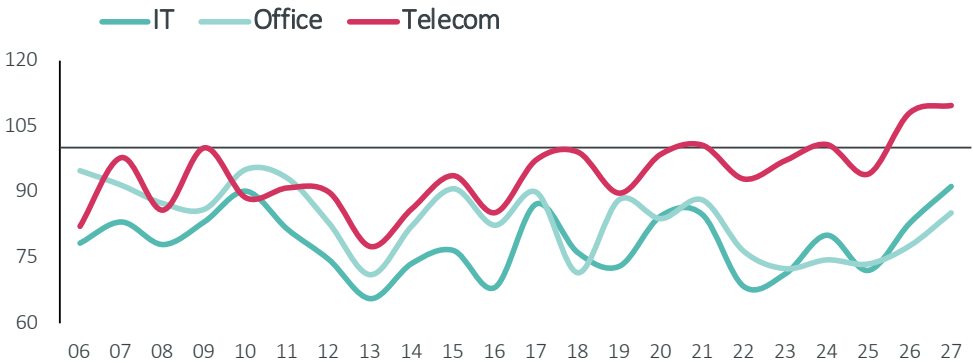
> Spain

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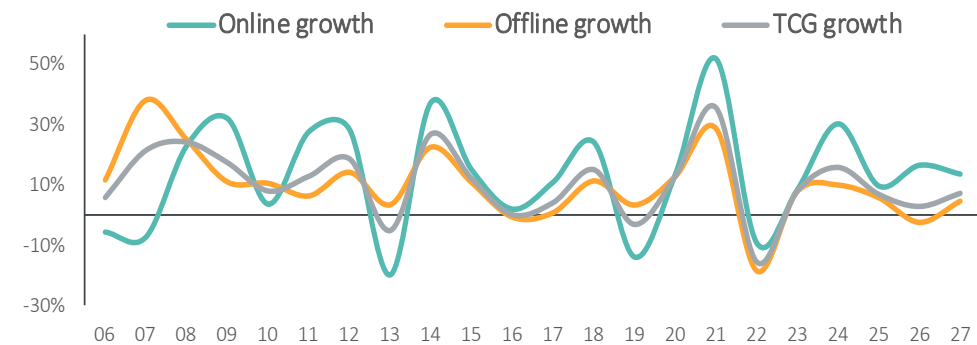
Brazil

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 27 (Jul 01 - Jul 07)



- Recovery of traditional retail at +5% - up from -2% in week 26 - supported growth of the traditional TCG market (+8%) which was lifted by online sales growing +14%.
- One of the drivers of this development was desk computing at +44%. Except for mobile computing at -11%, all other IT/Office products also posted positive trends, with inkjet printers at +4% the least successful. Smartphones experienced an acceleration of 15%.
- In week 27, cooling brought up the rear in MDAs/SDAs, at -15%. Vacuum cleaners at +18% marked the other end of the scale. TVs gained 29%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 27 2024 (no comparability with 2019); 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, 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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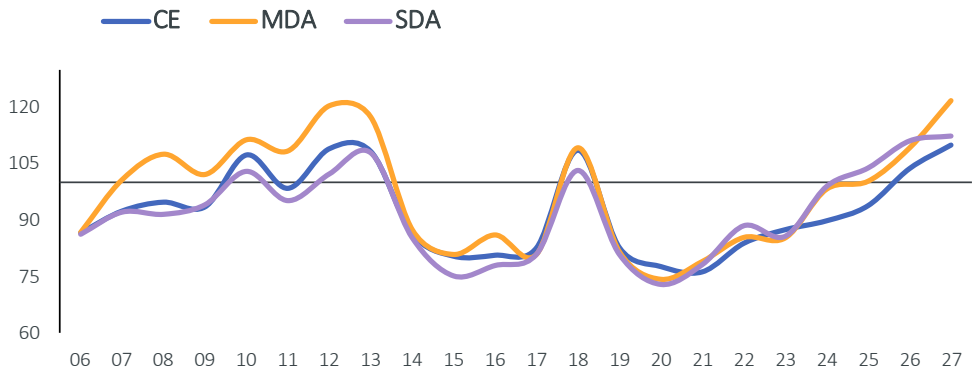
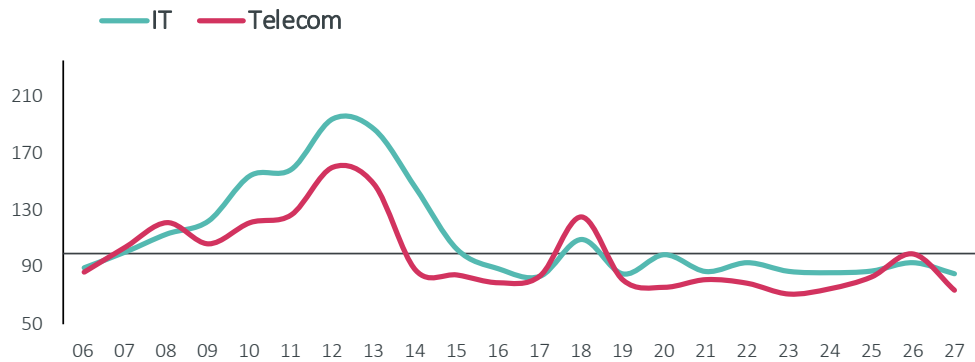
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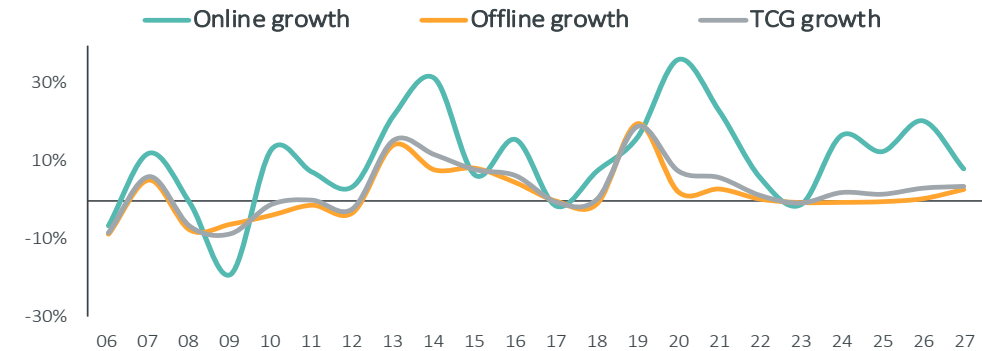
Brazil

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 27 (Jul 01 - Jul 07)



- Although online sales lost its dynamics and posted +8% after +21% in week 26, the total TCG market was up 4% as traditional retail posted +3%.
- Week 27 saw a strong drop for media tablets, at -11%, down from +65% in the previous week. Smartphones delivered +9%.
- Except for soundbars at -8%, CE categories saw double-digit uplifts with audio home systems out in front at +15% and PTVs at +14%. There was double-digit acceleration for most MDA/SDA products as well, with hot beverage makers in the lead at +30%. Cooling posted -4% and vacuum cleaners were down 1%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 - 27 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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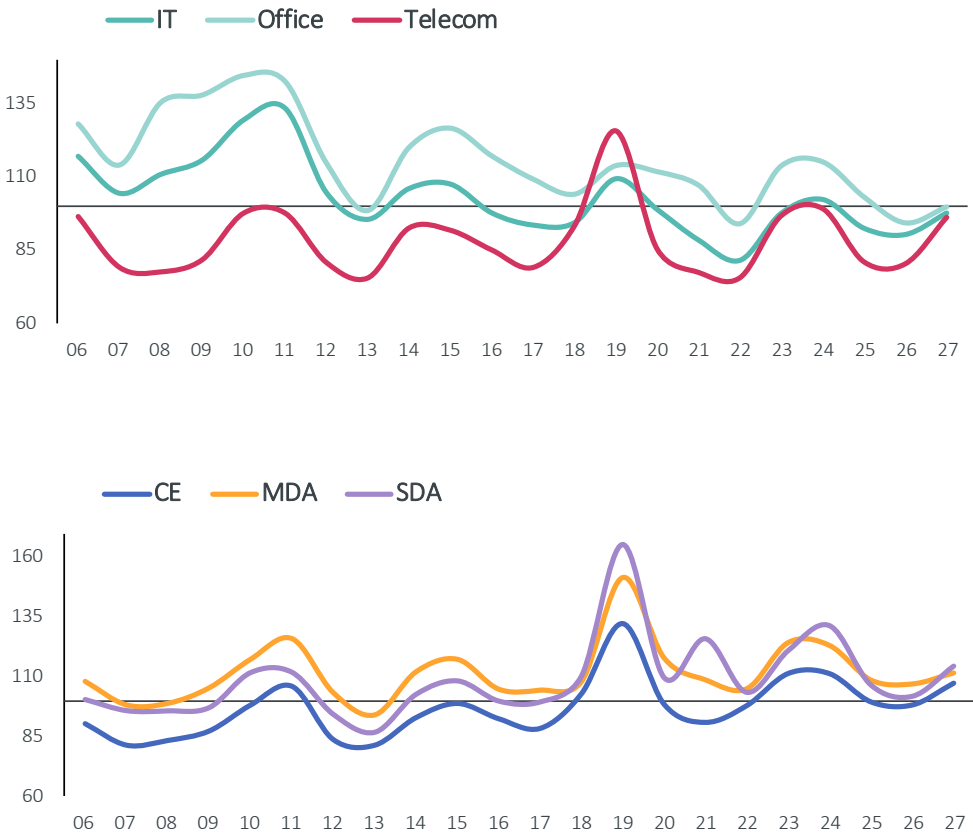
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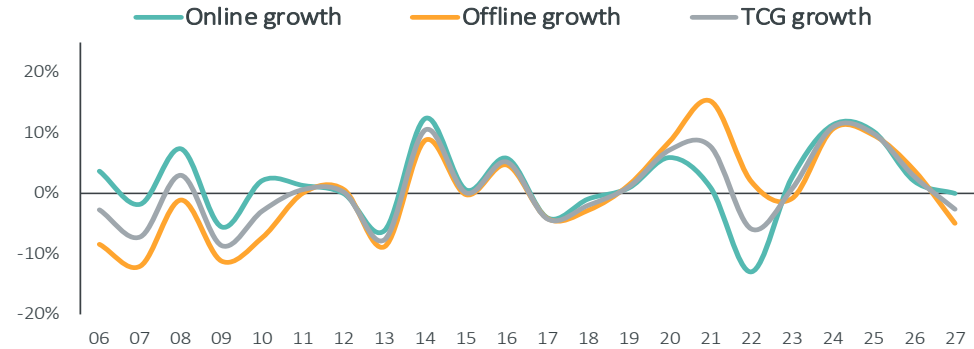
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China

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 27 (Jul 01 - Jul 07)



- Traditional retail delivered -5% which dragged the total TCG market down by 3%. Flat online sales were not able to compensate.
- Desk computing at +24% was the best-performing category in week 27. Media tablets claimed growth as well, at +14%. Mobile computing posted a negative trend delivering -3%. Smartphones slumped at -10%.
- Among MDA/SDA products, only shavers (-5%) delivered negative trends. At +12%, vacuum cleaners took the lead. Hot beverage makers were next at +11%. TVs posted a slight downswing of 3%, the same result as audio home systems.

Weekly retail insights from the Point of Sale

Spotlight on China



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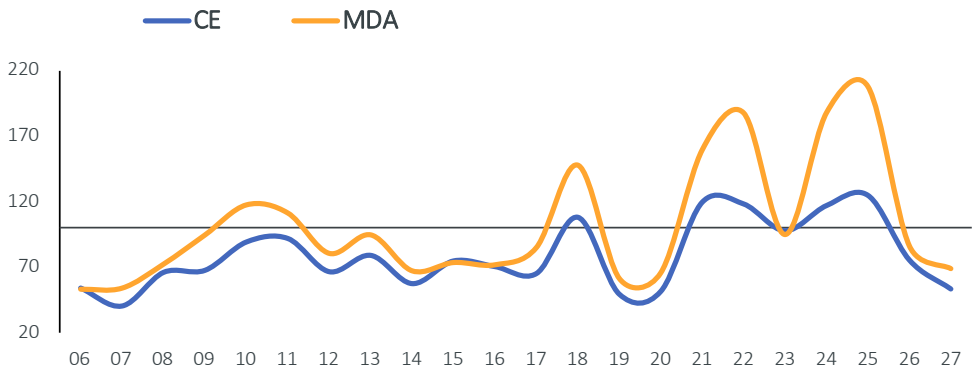
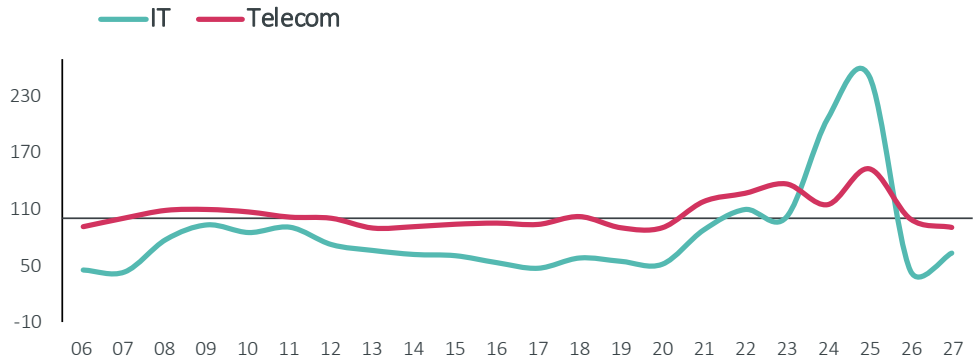
Spain

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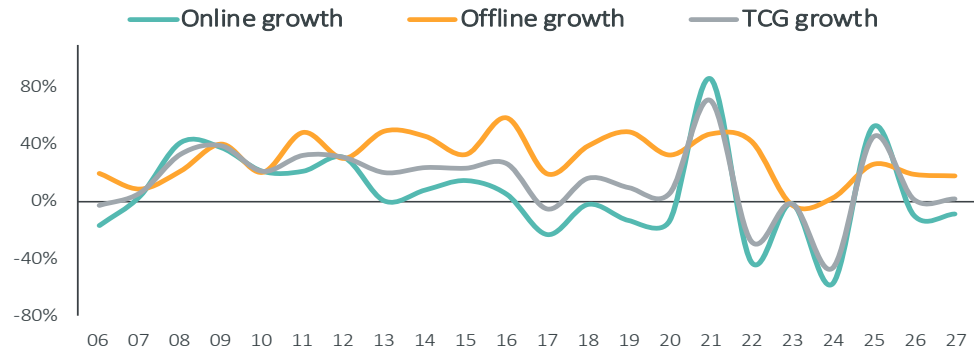
Brazil

➤ 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 27 (Jul 01 - Jul 07)



- Traditional retail delivered very solid results of +18% in week 27. Combined with declining online sales (-8%) this led to a slight plus of 2% for the total TCG market.
- Smartphones at +7% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing delivered a minus of 15%.
- PTV experienced a drop of -10%. Washing machines and cooling posted negative trends as well, at -7% and -9% respectively.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 - 27 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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