

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 215
Week 30 of 2024
Powered by **gfk**newron

NielsenIQ



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Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China



- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
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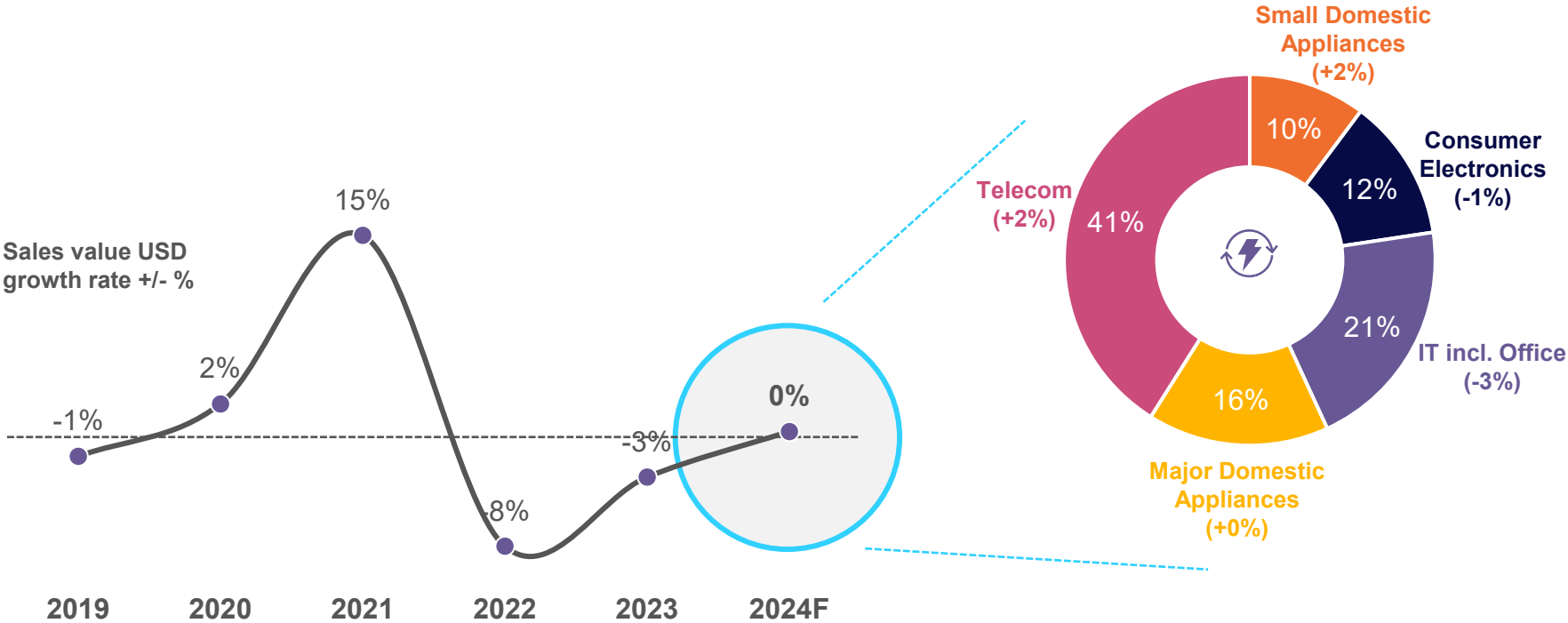
gfknewron empowers you to transform insights into profitable actions, craft winning plans with confidence, and turn potential challenges into opportunities for growth.

Fact of the Week

Cautious optimism for growth for 2024 as market stabilizes into positive dynamics

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Global (ex. North America) | Consumer Tech & Durables



SOURCE: Market Intelligence Sales Tracking and total market estimation incl. North America, based on USD; Forecasting date: February 20, 2024, assuming stable USD exchange rate

Weekly retail insights from the Point of Sale

Spotlight on Germany

About **gfknewron**

Fact of the week

Germany

Great Britain

France

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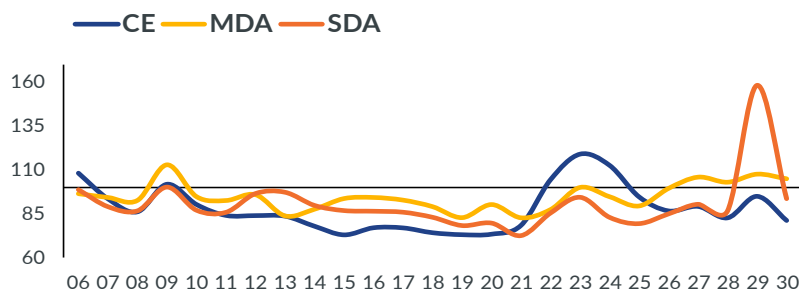
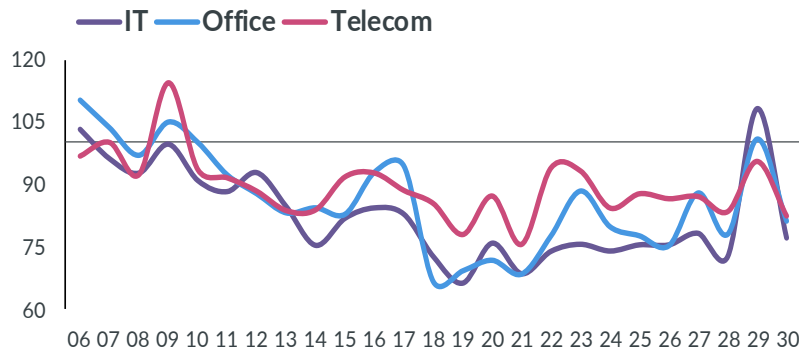
Japan

Brazil

China

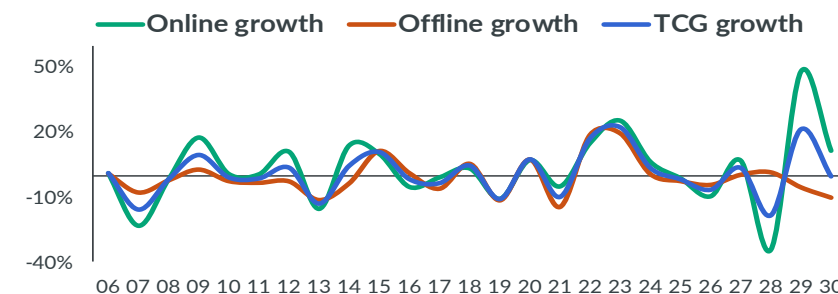
Please note: Below lines depict a sales index vs an average 2023 week. Above average absolute sales are shown as >100 (≠ growth rate vs same week 2023).

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 30 (Jul 22 – Jul 28)

- Online sales (+11%) and traditional retail (-10%) delivered an opposing development to each other, which resulted in a slight minus of 1% for the total TCG market.
- All IT/Office and telecom products posted negative trends with mobile computing out in front at -16%. Smartphones lagged at -1%.
- CE categories witnessed a downward trend too, with audio home systems at -25% and weak PTV at -4%. Within MDA/SDA only food preparation posted a negative trend at -11%. Air treatment delivered an outstanding growth of 200%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 30 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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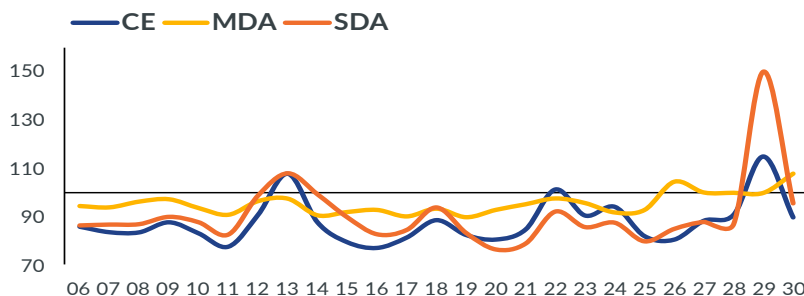
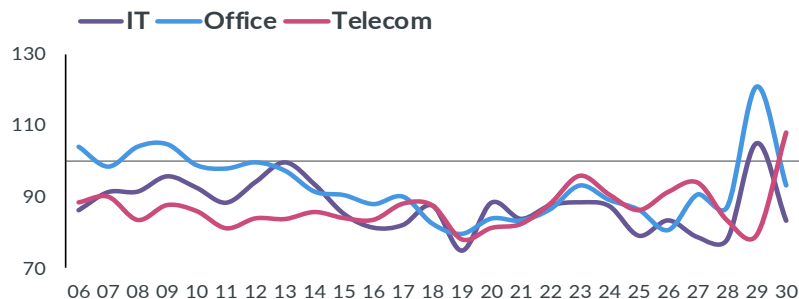
Spain

Japan

Brazil

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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 30 (Jul 22 – Jul 28)

- An eye-catching +26% for online sales boosted the total TCG market to +13%. Traditional retail posted a slight -1%.
- IT/Office products were led by peripherals. Mice grew at +33% and keyboards at +25%. Monitors were up 30%. Media tablets marked the other end of the scale at -13%. Smartphones accelerated at +26%.
- Except for washing machines (-1%), all other MDA/SDA categories grew. The best-performing category was hot beverage makers at +23%. Vacuum cleaners claimed second place, at +12%. PTVs lagged at -2%. Soundbars were flat.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 30 2024; 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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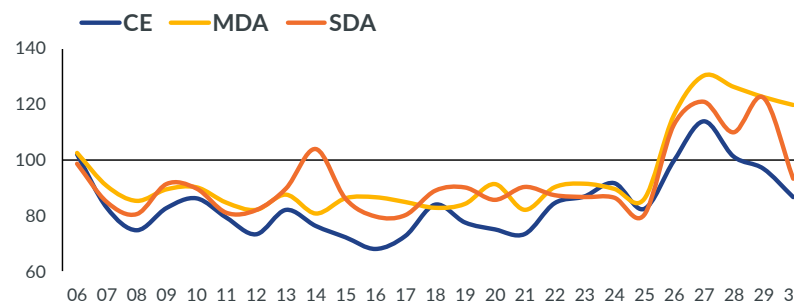
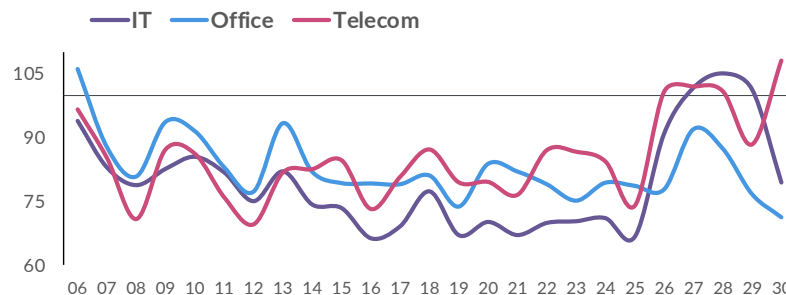
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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 30 (Jul 22 – Jul 28)

- The total TCG market was flat, driven by online sales at +13% and traditional retail at -6%.
- While monitors at +7% and keyboards at +5% posted positive trends, the other IT/Office categories were less successful. Inkjet printers at -14% saw the worst result. Smartphones grew by 14%.
- In week 30, air treatment stood out in MDA/SDA products at +90%. At the other end of the scale, food preparation posted -18%. CE categories were negative throughout, ranging from -2% for PTVs to -27% for audio home systems.



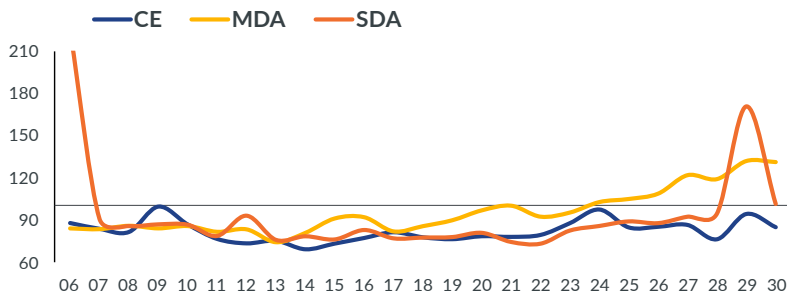
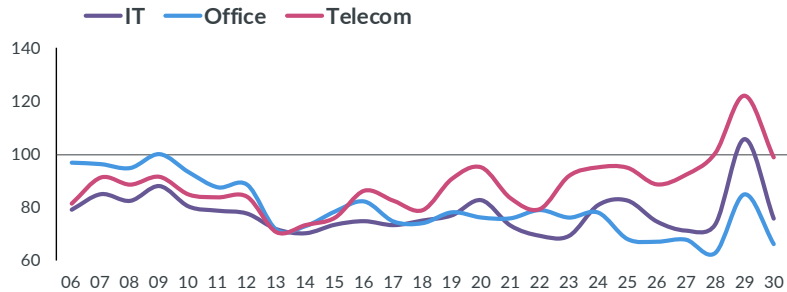
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 30 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and washing machines – Small domestic appliances (SDA): 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

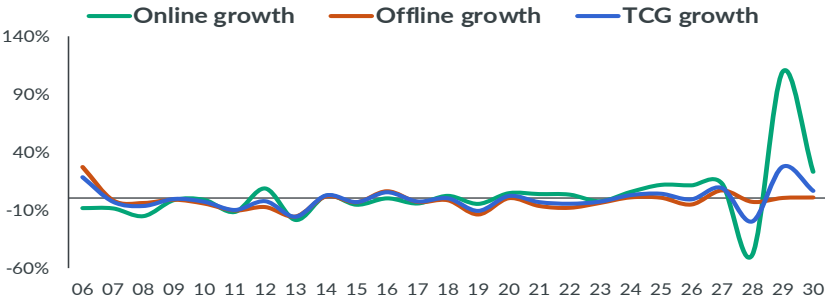
Spotlight on Italy

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



Key take aways in calendar week 30 (Jul 22 – Jul 28)

- Acceleration of online sales (+23%) lifted the total TCG market. Its growth rate of +6% was impacted by just +1% for traditional retail.
- IT/Office products delivered moderate ups and downs with laser printers leading at +9% and media tablets at the other end of the scale at -5%. Smartphones posted a plus of 5%.
- Week 30 saw many MDA/SDA categories increase in double digits. Air treatment posted the highest uplift at +31%. PTV accelerated at +10%. Audio home systems were the worst-performing category in week 30, at -19%.



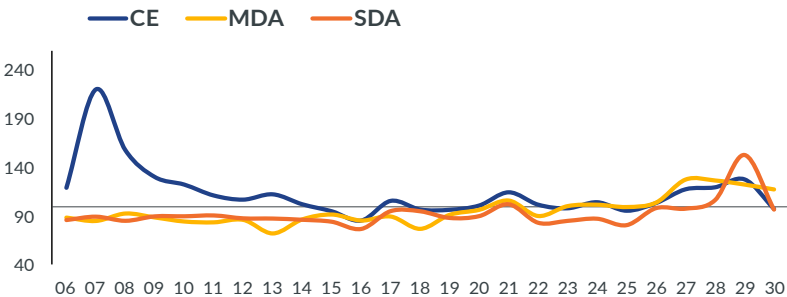
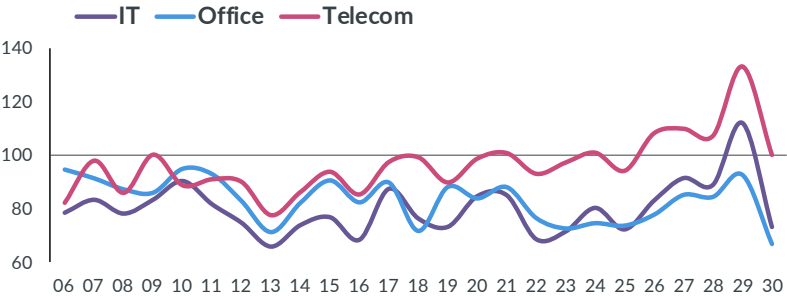
SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 30 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, 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

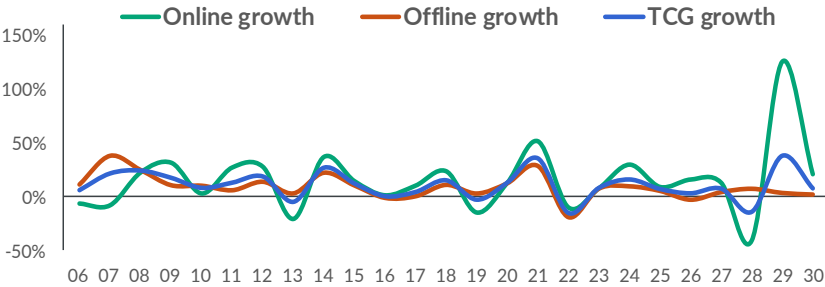
Spotlight on Spain

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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 30 (Jul 22 – Jul 28)

- Growth of 22% for online sales and 3% for traditional retail led to an average of 8% for the total TCG market.
- Most IT/Office categories delivered growth, led by media tablets at +26%. Mobile computing and inkjet printers were weak at -2% and -1% respectively. Smartphones experienced good growth at +13%.
- While audio home systems decelerated at -21%, PTV and soundbars were up 19% and 20%. Hot beverage makers performed well too at +26%. MDAs were less successful, posting -7% for cooling and -4% for washing machines.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 30 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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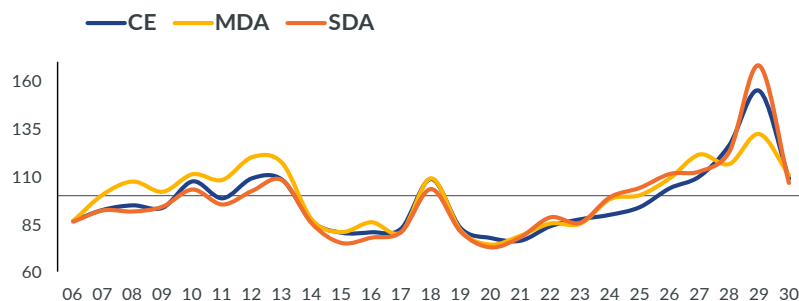
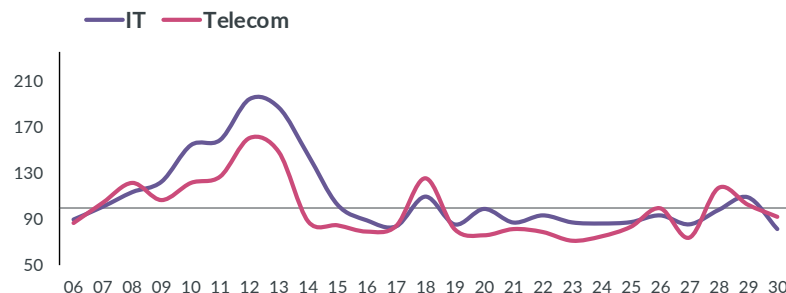
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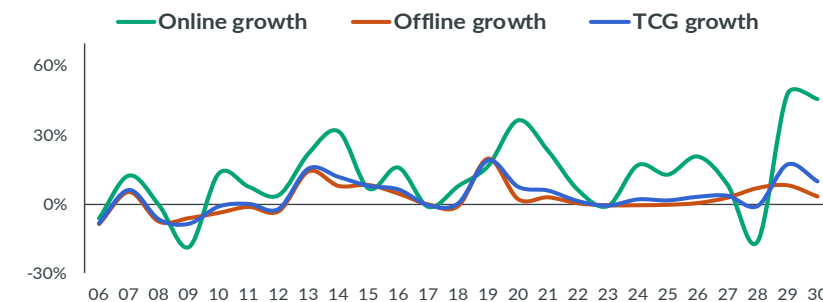
Brazil

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 30 (Jul 22 – Jul 28)

- Traditional retail delivered a small plus of 3%. Online sales posted +46% but due to its small share compared to traditional retail, it delivered just +10% for total TCG.
- Week 30 saw double-digit development for IT and telecom products with media tablets in the lead at +21% and smartphones at +15%.
- CE categories saw double-digit increases throughout with headsets in the lead at +26% and TVs posting +16%. In MDA/SDA, dental care stood out at +106%. Air treatment was the weakest category at -4%.



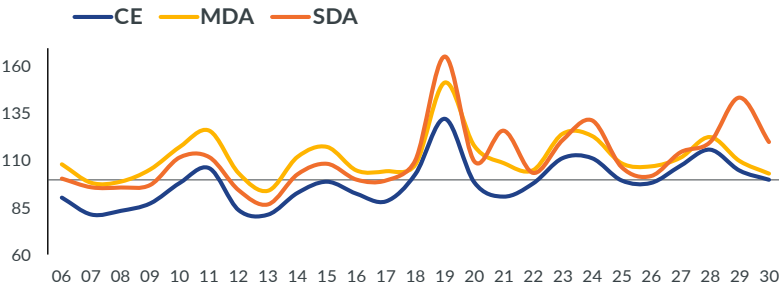
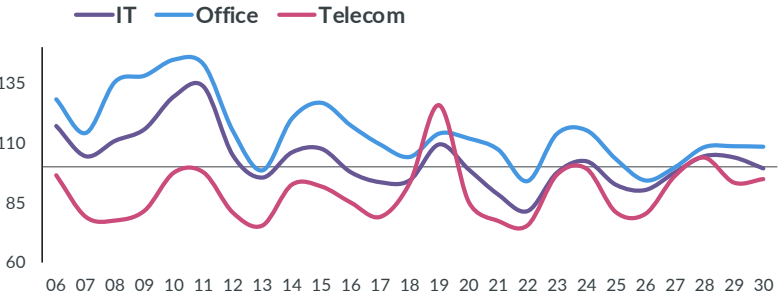
SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 30 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile computing, media tablets – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and 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

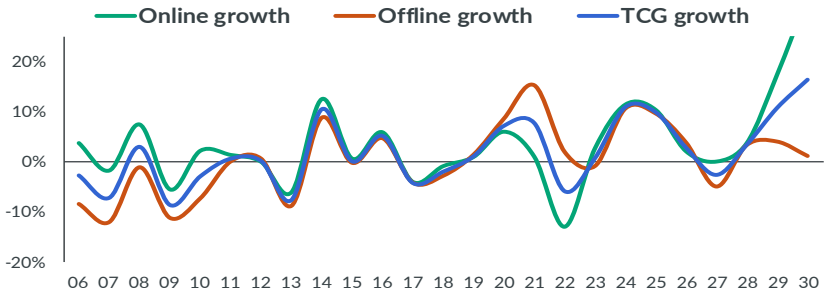
Spotlight on Brazil

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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 30 (Jul 22 – Jul 28)

- Acceleration of online sales of +33% and an uptick of 1% for the traditional retail led to +16% for the total TCG market.
- Most IT/Office and telecom products posted double-digit growth rates with media tablets in the lead at +31%. Mobile computing delivered +8%. Smartphones were up 18%.
- There was double-digit growth for all MDA/SDA products. Week 30 saw vacuum cleaners out in front at +54%. Shavers claimed second place at +32%. CE categories were weak in week 30, with audio home systems at +3% and PTV at +6%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 30 2024; 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

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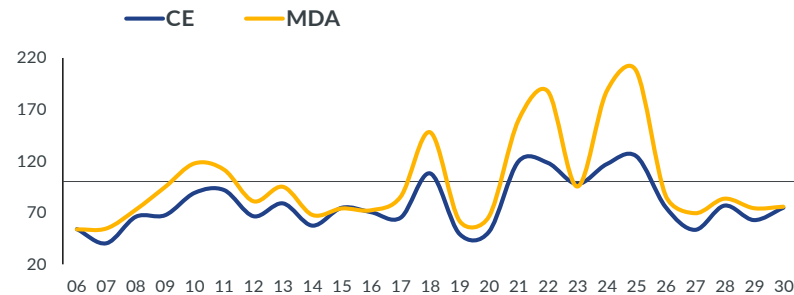
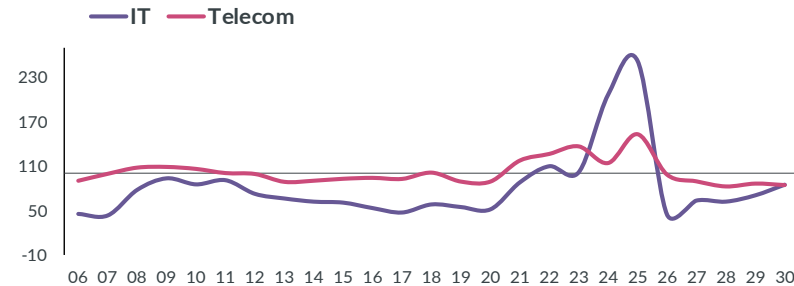
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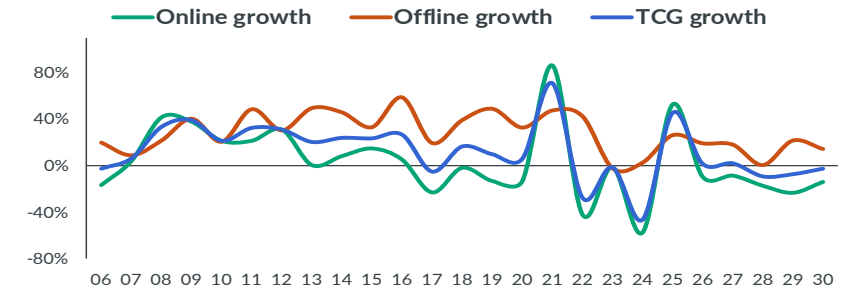
Brazil

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 30 (Jul 22 – Jul 28)

- Online sales (-14%) and traditional retail (+14%) delivered an opposing development to each other, which resulted in -3% for the total TCG market.
- In week 30, mobile computing decelerated at 9%. Smartphones were weak, too, down by a slight -1%.
- While cooling was the weakest of all categories, losing 12%, washing machines, and PTV each gained 2%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 30 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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