

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 216
Week 31 of 2024
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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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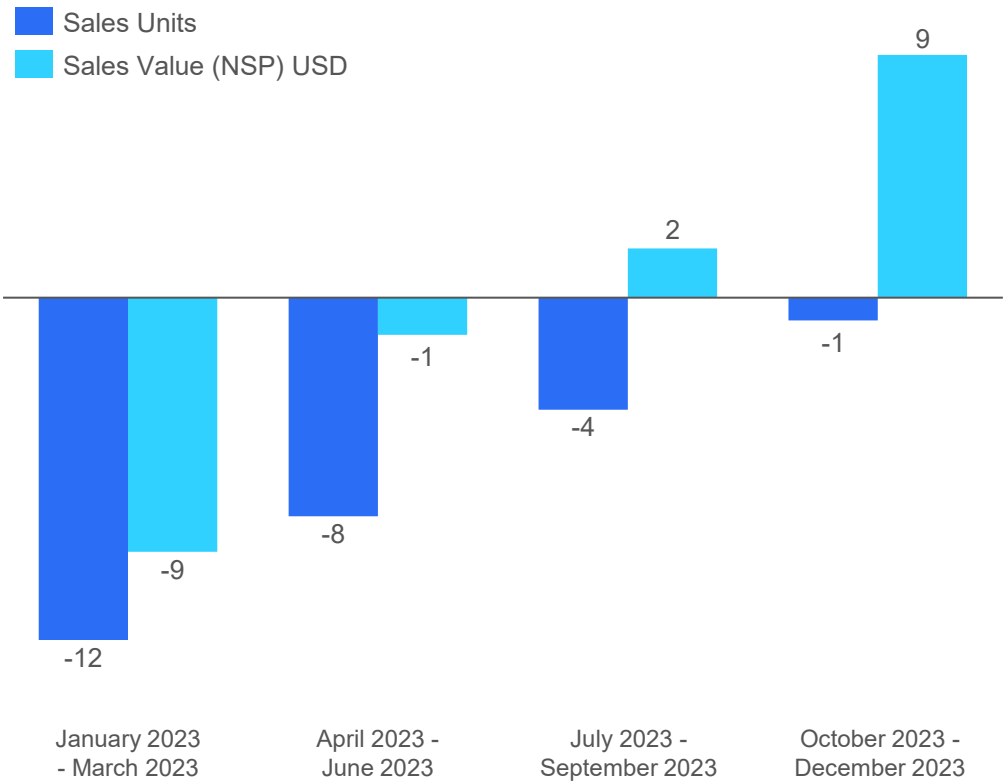
gfknewron empowers you to transform insights into profitable actions, craft winning plans with confidence, and turn potential challenges into opportunities for growth.

Fact of the Week

As we see a gradually acceleration of sales, we can be slightly optimistic about 2024!

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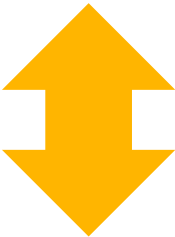
Smart/Mobilephone | International Coverage excl. North America



Expectations 2024



Increase Revenue USD NSP



Levelling Sales Units

Weekly retail insights from the Point of Sale

Spotlight on Germany

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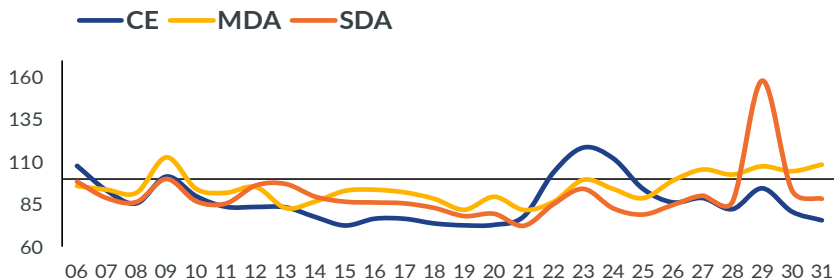
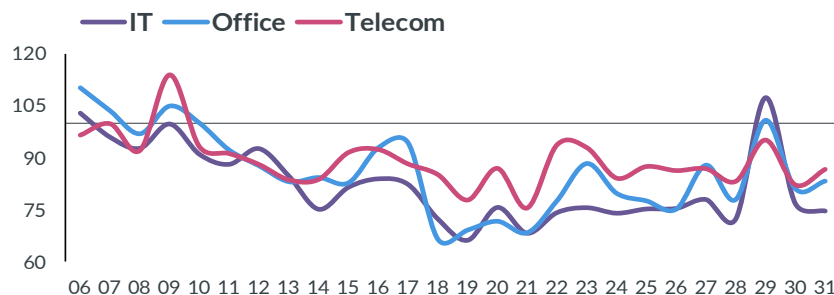
Spain

Japan

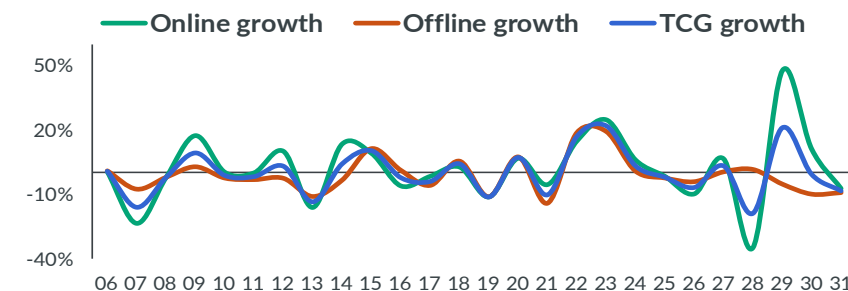
Brazil

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 31 (Jul 29 – Aug 04)

- Close trends for online sales (-7%) and traditional retail (-9%) delivered an average of -8% for the total TCG market.
- All IT/Office products lost in solid double digits, ranging from -10% for monitors to -23% for mobile computing. Smartphones lagged at -6%.
- CE categories witnessed even higher losses with soundbars posting -39% and PTV down by 24%. While food preparation delivered -20%, all other MDA/SDA categories posted moderate ups and downs. Air treatment stood out at +164%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 31 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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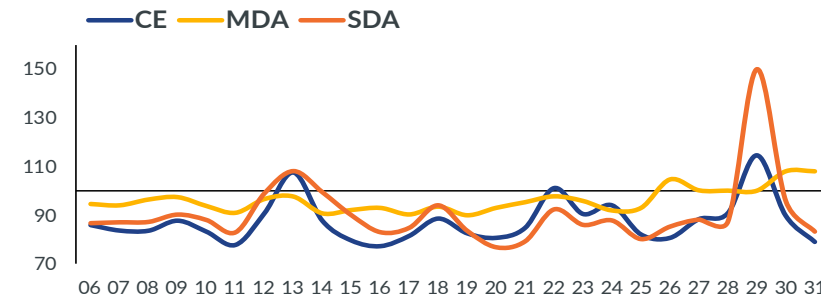
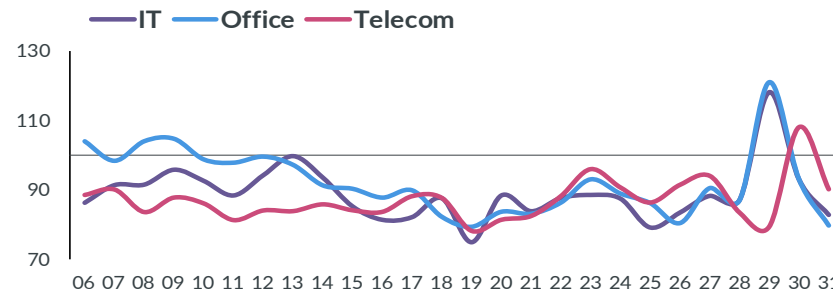
Spain

Japan

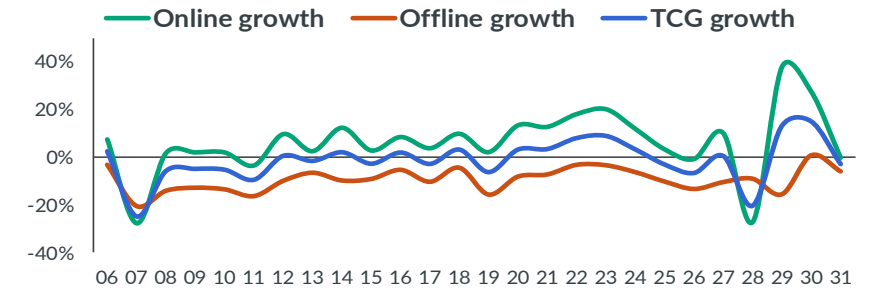
Brazil

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 31 (Jul 29 – Aug 04)

- Traditional retail at -6% dragged the total TCG market down by 3%. Flat online sales were not able to compensate.
- IT/Office products ranged from between +9% for pointing devices to -16% for laser printers. Smartphones experienced a small uptick of 2%.
- CE products were double-digit negative with soundbars in the lead at -21% and PTV posting -16%. The mixed picture for MDA/SDA categories saw cooling out in front at +8% and vacuum cleaners bringing up the rear at -13%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 31 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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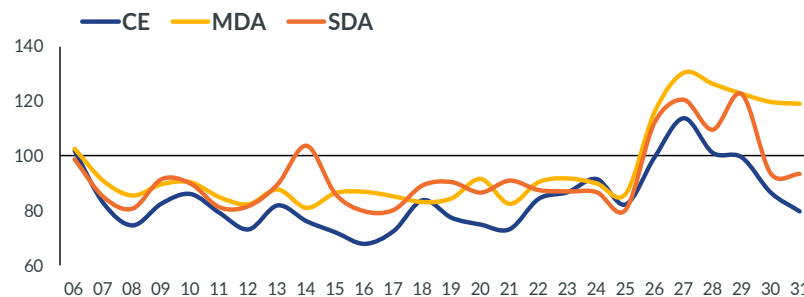
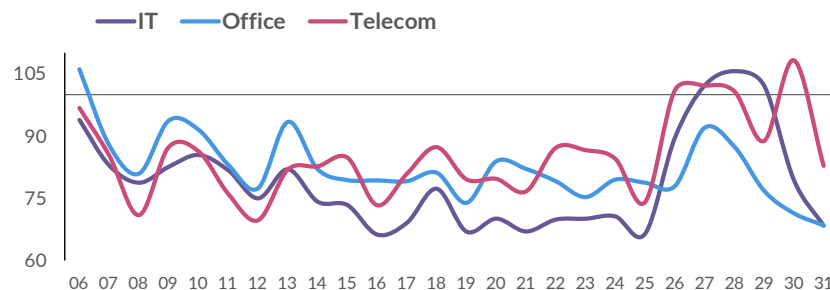
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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 31 (Jul 29 – Aug 04)

- Online sales (-13%) dragged the total TCG market down by 10%. Traditional retail at -9% added to it.
- IT/Office products and telecom drove this trend. While laser printers at -30% were hit the most, keyboards posted a minus of 12%. Smartphones lagged at -14%.
- CE categories suffered too, with audio home systems posting the highest decrease in week 31, at -37%. MDAs were flat. Apart from outstanding results for air treatment, with a plus of more than 500% boosted by heat waves, only shavers increased (+14%).



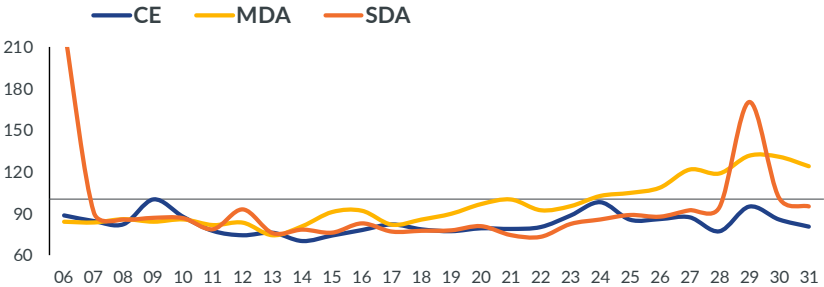
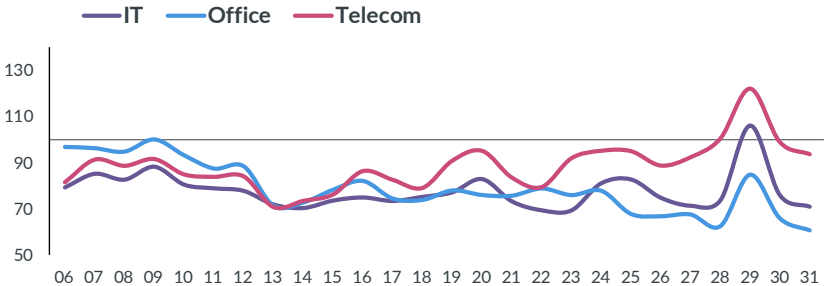
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 31 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

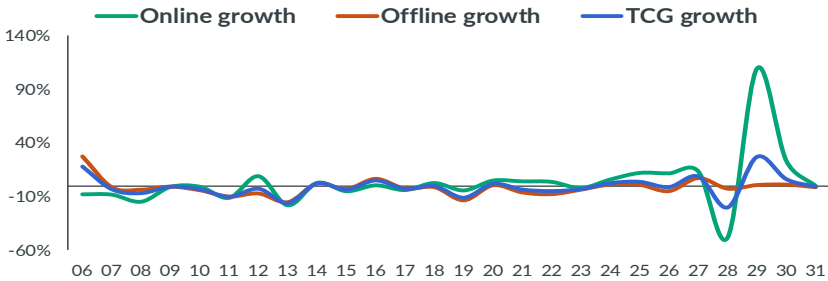
Spotlight on Italy

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



Key take aways in calendar week 31 (Jul 29 – Aug 04)

- The total TCG market experienced a slight downswing of 1% as traditional retail decreased by 1% and online sales were flat.
- IT/Office products delivered moderate ups and downs with laser printers leading at +9% and desk computing at the other end of the scale at -17%. Smartphones posted a small minus of 3%.
- Within the mixed scenario for MDA/SDA, air treatment posted the highest uplift at +278%. PTV decreased at -6%. Audio home systems were the worst-performing category, at -30%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 31 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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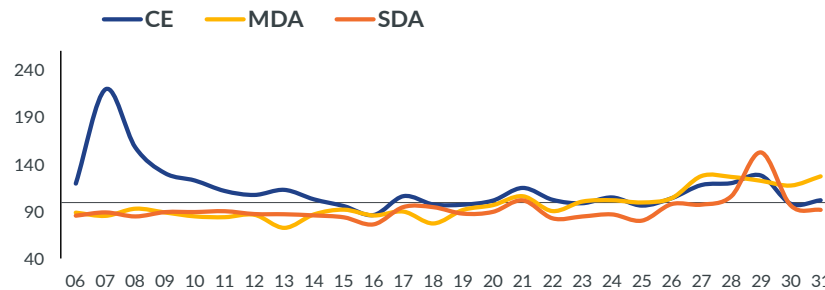
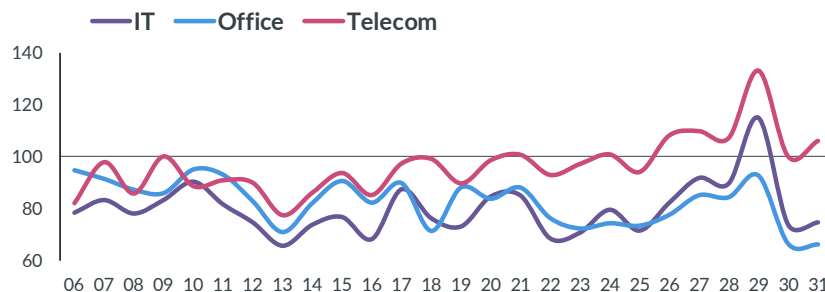
Spain

Japan

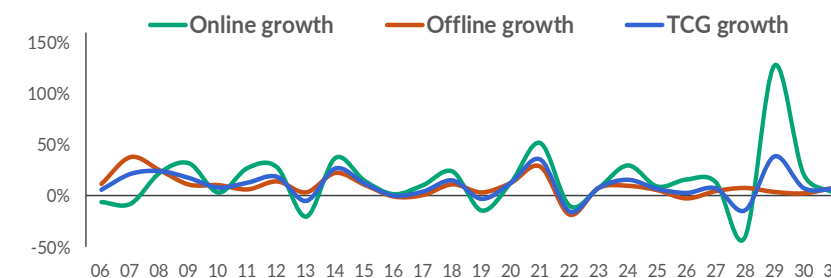
Brazil

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 31 (Jul 29 – Aug 04)

- Growth of 4% for online sales and 8% for traditional retail led to an average of 7% for the total TCG market.
- The mixed picture for IT/Office categories saw laser printers in the lead at +8% and desk computing claiming second place at +4%. Inkjet printers were at the other end of the scale at -7%. Smartphones experienced good growth at +9%.
- While audio home systems decelerated at -17%, PTV rose 19%. MDAs/SDAs were less successful, posting +7% for cooling and hot beverage makers, +3% for shavers, and +2% vacuum cleaners. Washing machines were flat.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 31 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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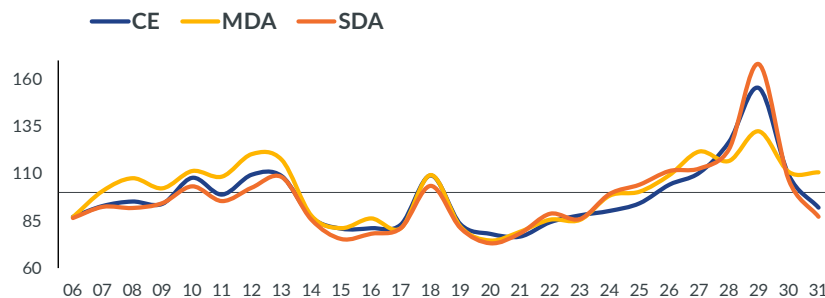
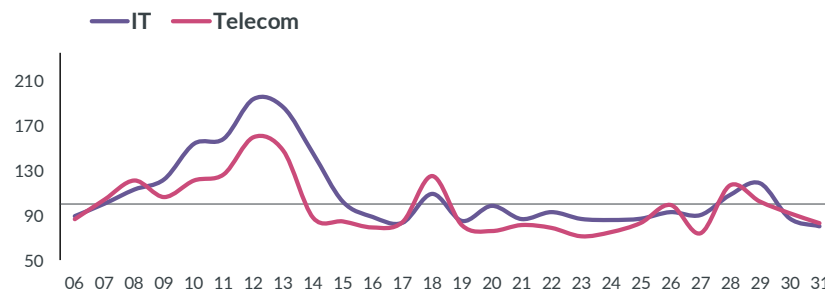
Spain

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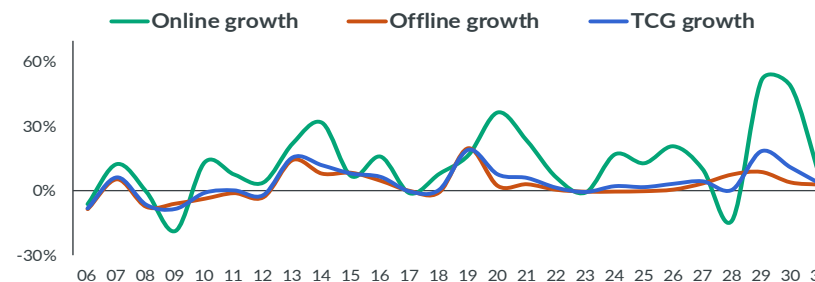
Brazil

China

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



Key take aways in calendar week 31 (Jul 29 – Aug 04)

- Traditional retail delivered a small plus of 3%, resulting in +3% for the total TCG market too. Due to its small share compared to traditional retail, online sales at +6% was not able to impact the total result.
- Week 31 saw double-digit development for IT and telecom products with media tablets in the lead at +32% and smartphones at +24%. Mobile computing was flat.
- CE categories posted slight ups and downs. While dental care and food preparation delivered good results of +25% and +18% respectively, air treatment lost 17%.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 31 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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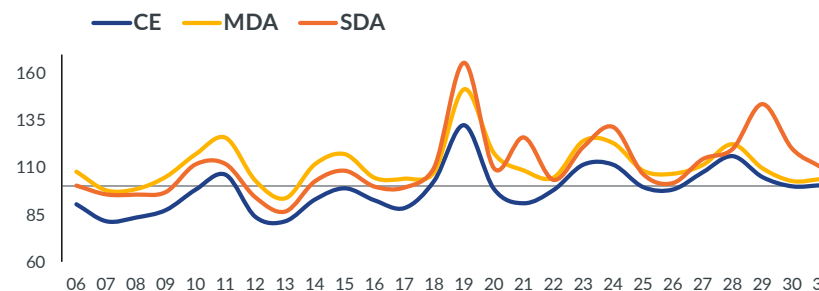
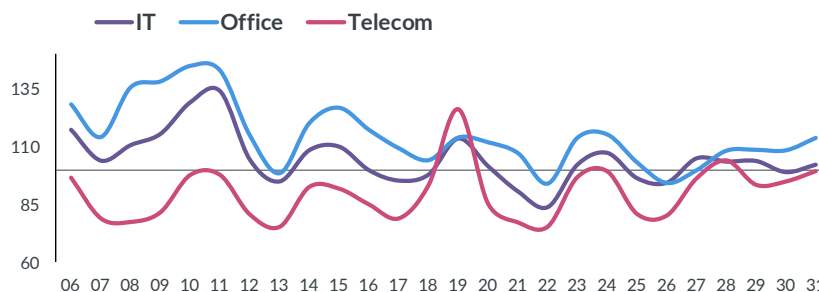
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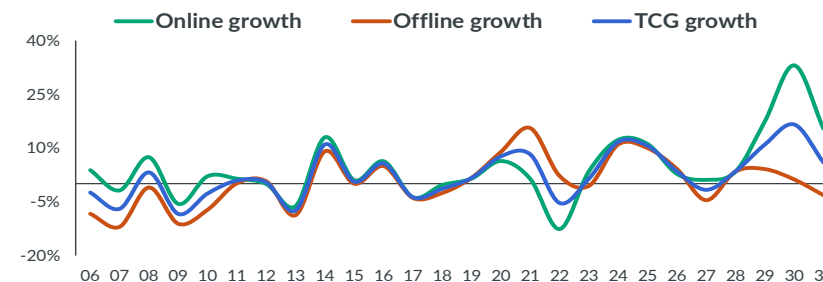
Brazil

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



Key take aways in calendar week 31 (Jul 29 – Aug 04)

- Acceleration of online sales of +15% and a slight downswing of 3% for the traditional retail led to +6% for the total TCG market.
- Most IT/Office products posted double-digit growth rates with laser printers in the lead at +21%. Mobile computing delivered -4%. Smartphones were up 5%.
- There was double-digit growth for cooling (+17%), washing machines (+15%), and vacuum cleaners (+14%). Shavers were weak in week 31 at -7%. Audio home systems were the worst-performing category, at -10%, while PTV posted +1%.



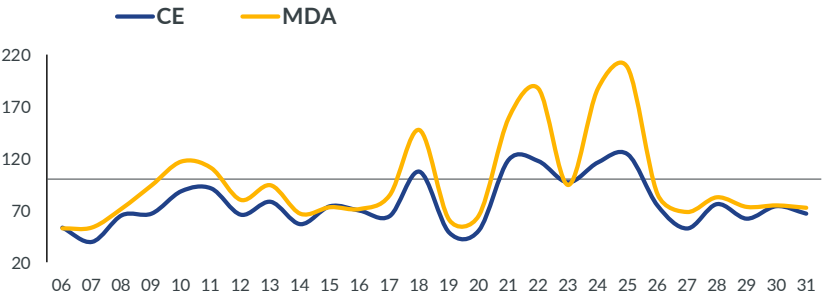
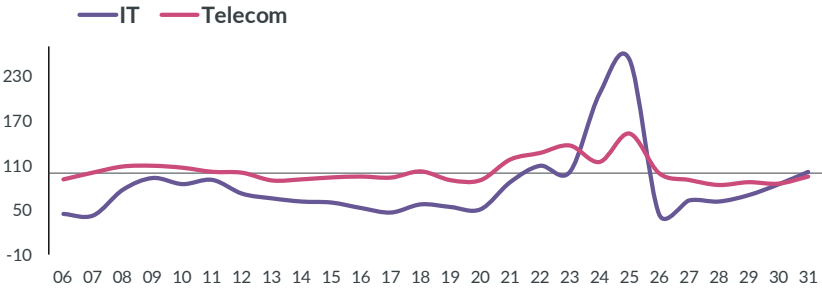
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 31 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

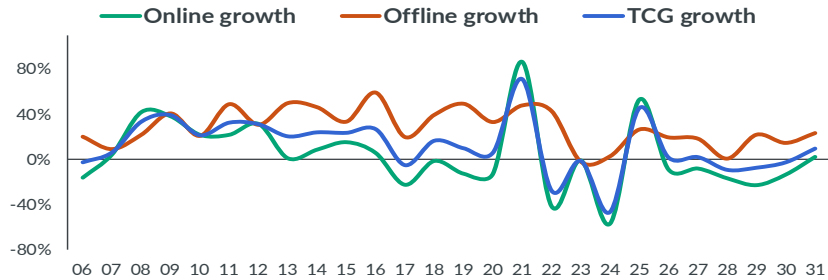
Spotlight on China

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



Key take aways in calendar week 31 (Jul 29 – Aug 04)

- Traditional retail at +23% lifted the total TCG market to a plus of 9%. Online sales added to it at +2%.
- Smartphones at +15% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing delivered a slight minus of 1%.
- While cooling was the weakest of all categories, losing 9%, washing machines declined by just 1%. PTV gained 2%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 31 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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