

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 217
Week 32 of 2024
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NielsenIQ



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Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

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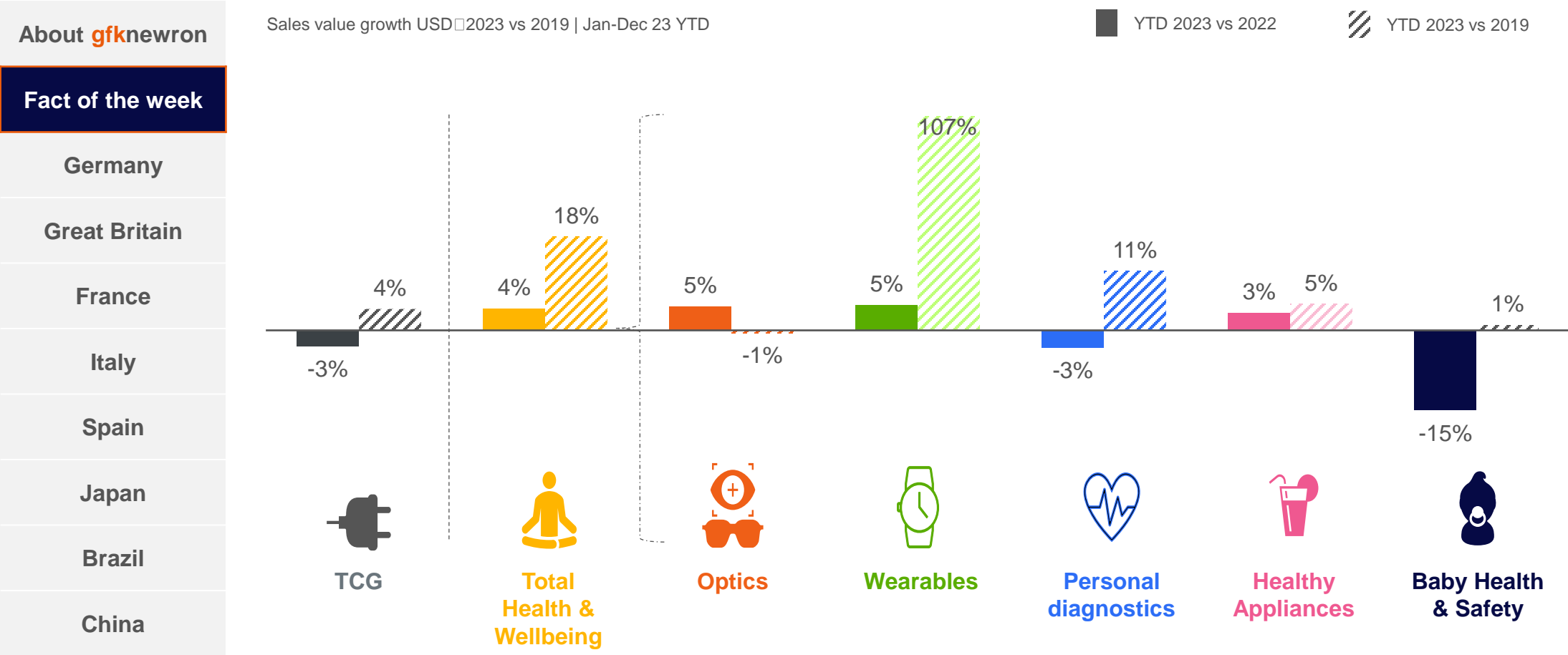
In an era where market fluctuations are the norm, having a finger on the pulse of weekly changes is crucial. **gfknewron** offers more than just data; it provides clarity and direction in a sea of information so you can act based on the most current facts.

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.

Fact of the Week

Health and wellbeing demand has stagnated after an unprecedented surge in demand during the pandemic



SOURCE: Market Intelligence Sales Tracking; Retailer Market; International Coverage; Sales revenue growth USD Jan-Dec 2023 vs Jan-Dec 2022, vs Jan-Dec 2019
Personal Diagnostics: blood pressure monitor, digital thermometers, personal scales, nebulizers; Lenses & Care solutions: contact lenses, spectacle lenses, eyedrop care; Core Wearables: smartwatches, wrist sport computer, health & fitness tracker
Health Appliances: light therapy; Food Preparation: liquidisers, juicers/presses, hypoglycemic rice cooker, hot air fryers, water filters, air treatment; Baby Health & Safety: baby monitors

Weekly retail insights from the Point of Sale

Spotlight on Germany

About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

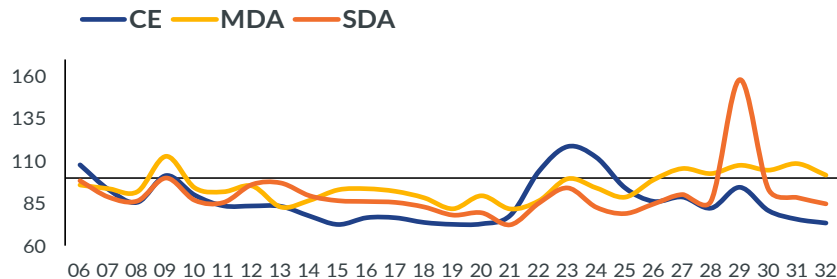
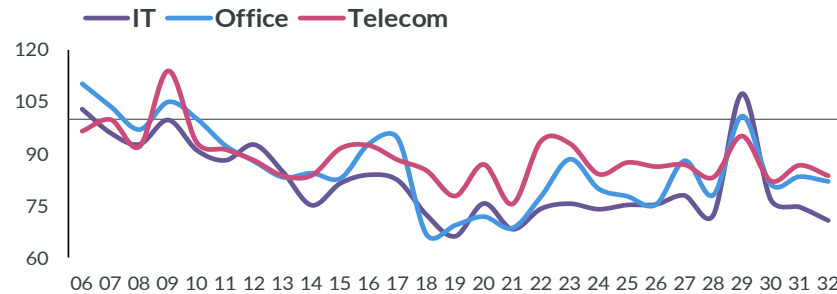
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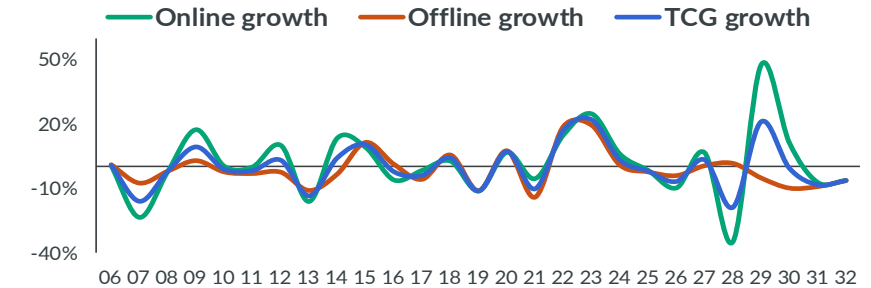
Brazil

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 32 (Aug 05 – Aug 11)

- Close trends for online sales (-6%) and traditional retail (-7%) delivered an average of -6% for the total TCG market.
- While laser printers experienced a slight uptick of 1%, all other IT/Office products posted negative trends. Mobile computing led at -22%. Inkjet printers were hit the least at -3%. Smartphones lagged at -6%.
- CE categories witnessed losses too with soundbars posting -28% and PTV down by 9%. While air treatment stood out at +105%, all other MDA/SDA categories posted moderate ups and downs.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 32 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

About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

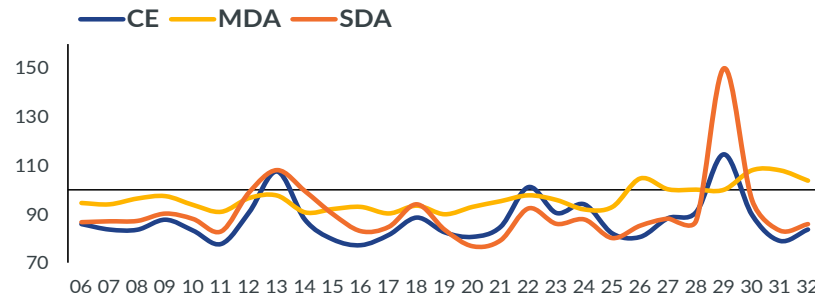
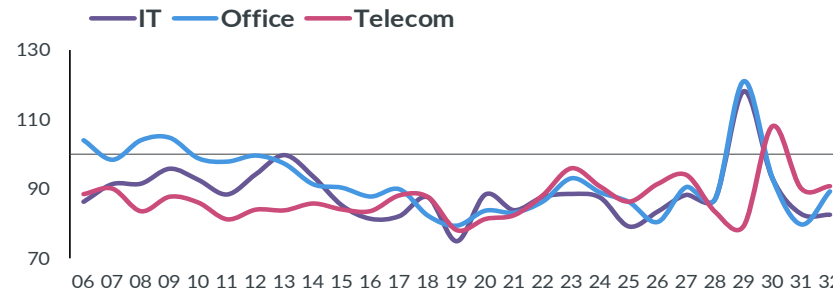
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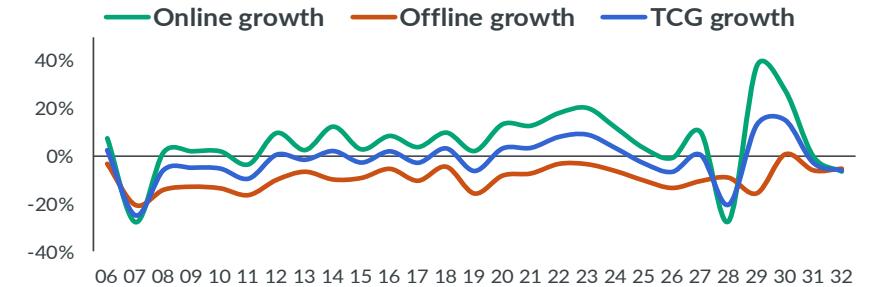
Brazil

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 32 (Aug 05 – Aug 11)

- Nearly identical rates for traditional retail (-5%) and online sales (-6%) led to a minus of 6% for the total TCG market.
- IT/Office products were led by monitors at +20%. Mice claimed second place at +17%. Media tablets were at the other end of the scale at -35%. Smartphones lagged at -9%.
- CE products posted a mixed picture with audio home systems at +21% and PTV at -5%. MDAs/SDAs also delivered an ambivalent performance with food preparation in the lead at +10% and washing machines at -4%.



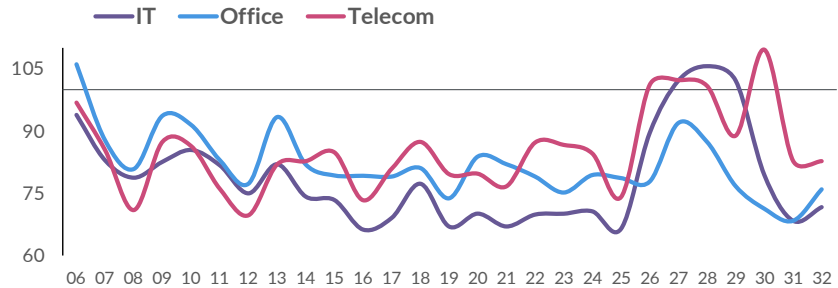
SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 32 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet 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

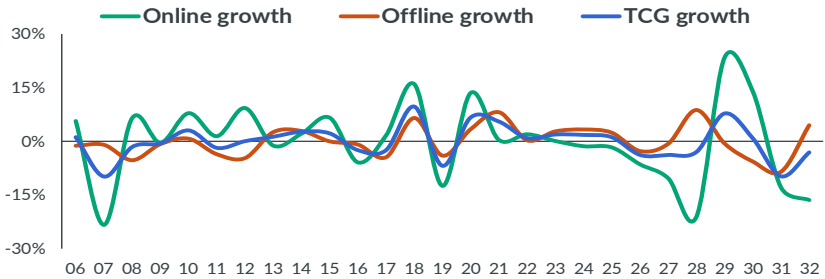
Spotlight on France

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 32 (Aug 05 – Aug 11)

- Online sales (-17%) dragged the total TCG market down by 3%. Traditional retail at +4% was not able to compensate.
- While peripherals were positive with monitors at +5% and mice at +2%, all other IT/Office products were negative. Desk computing and media tablets led at -17%. Smartphones slumped at -19%.
- Except for headsets at +5%, CEs also suffered, with audio home systems posting the highest decrease at -26% and soundbars at -25%. Food preparation (-9%) and hot beverage makers (-7%) were the only negative categories in DA.



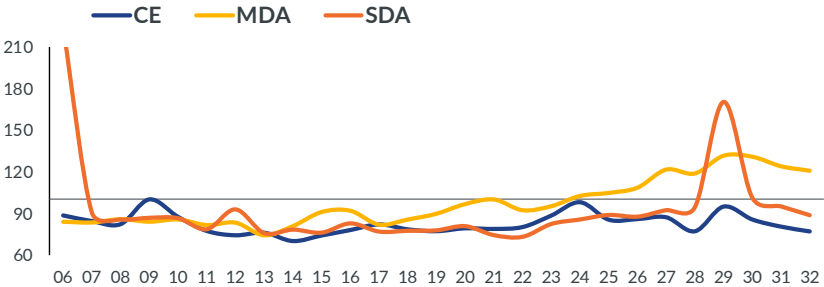
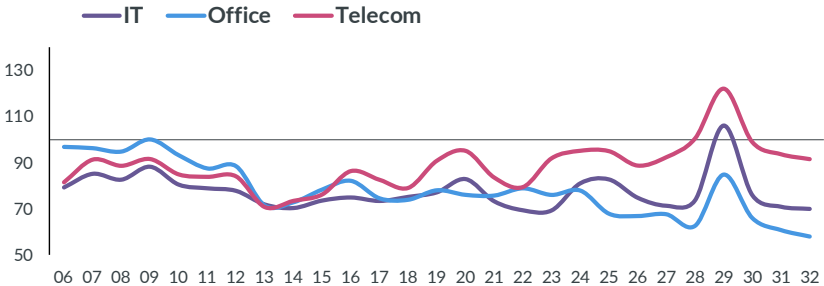
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 32 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

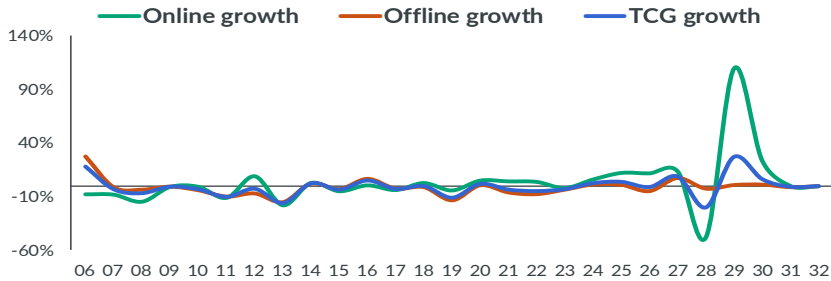
Spotlight on Italy

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 32 (Aug 05 – Aug 11)

- The total TCG market was flat in week 32, as online sales plateaued, and traditional retail posted a slight -1%.
- Except for laser printers (+13%), all other IT/Office products delivered negative trends with inkjet printers and desk computing at -11%. Smartphones posted a minus of 6%.
- While PTVs dropped by just 2%, audio home systems and soundbars were hit harder, at -27% and -22%. In MDA/SDA, air treatment posted the highest uplift at +292%. Dental care (+30%) and cooling (+24%) also delivered good results. Food preparation experienced a decline of -13%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 32 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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Fact of the week

Germany

Great Britain

France

Italy

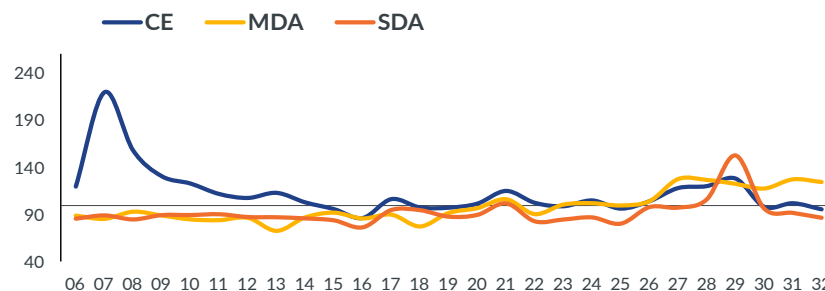
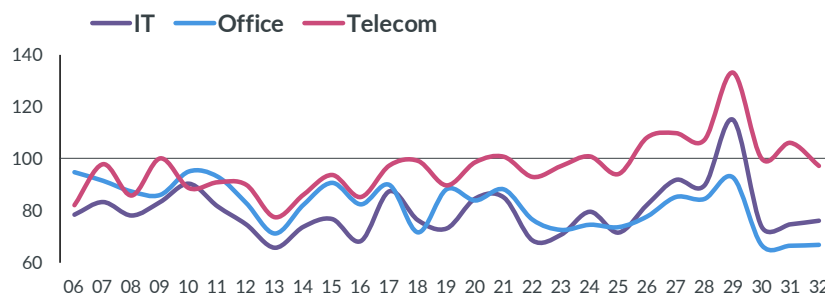
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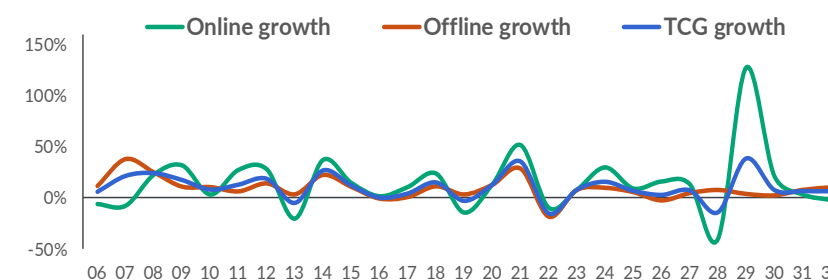
Brazil

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 32 (Aug 05 – Aug 11)

- Growth of 11% for traditional retail lifted the total TCG market by 7%. Online sales delivered a decline of 2%.
- Except for media tablets at -16%, IT/Office categories posted positive trends with laser printers in the lead at +28%. Smartphones lagged at -4%.
- While audio home systems decelerated at -5%, PTV was up 20%. Headsets delivered good results for CE at +23%. MDAs/SDAs were positive, with vacuum cleaners on top at +20%. Washing machines at +2% sat at the end of the scale.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 32 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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Fact of the week

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Great Britain

France

Italy

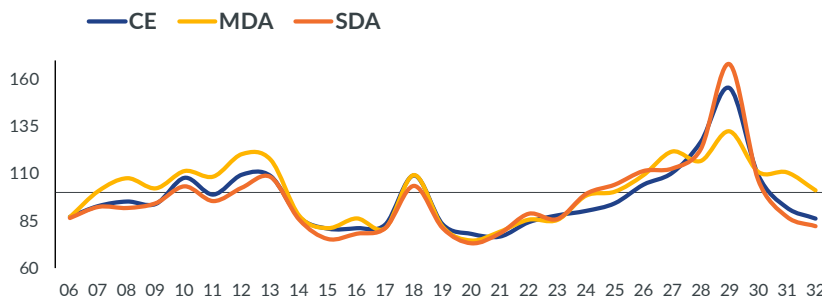
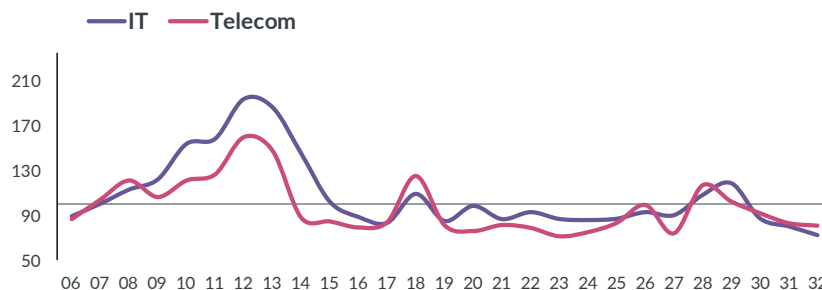
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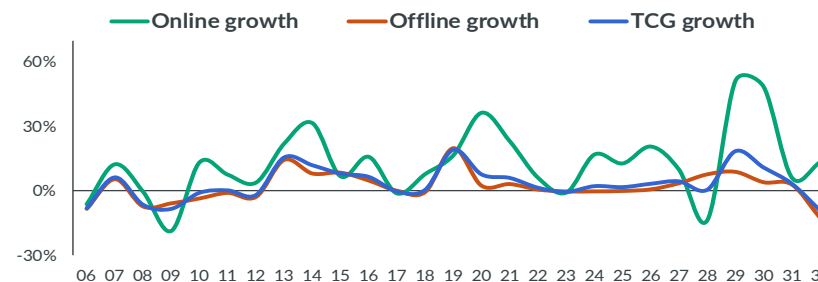
Brazil

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 32 (Aug 05 – Aug 11)

- Traditional retail (-13%) and online sales (+13%) delivered opposing results to each other but due to its small share compared to traditional retail, online sales was not able to impact the total result of -9%.
- Week 32 saw a decline of 6% for smartphones and loss of 14% for mobile computing. Media tablets won 4%.
- CE categories were double-digit negative with soundbars in the lead at -19%. Headsets were flat. While air treatment lost 21% and MDA posted -10%, dental care and food preparation delivered good results of +17% and +13% respectively.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 32 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

About **gfknewron**

Fact of the week

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France

Italy

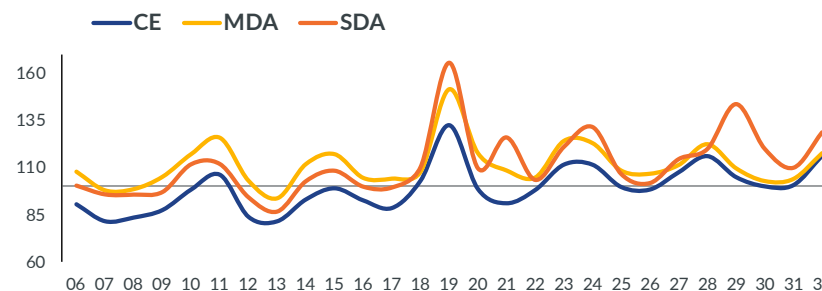
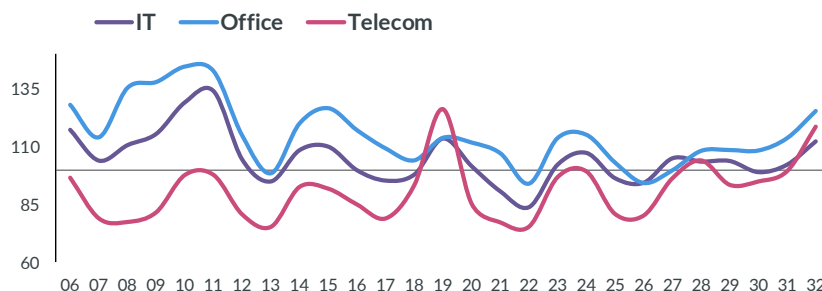
Spain

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 32 (Aug 05 – Aug 11)

- Acceleration of online sales of +13% and flat traditional retail led to +6% for the total TCG market.
- Most IT/Office products posted double-digit growth rates with desk computing in the lead at +20% and laser printers claiming second place at +19%. Mobile computing delivered -1%. Smartphones were up 3%.
- There was double-digit growth for cooling (+20%), washing machines (+21%), vacuum cleaners (+17%), and food preparation (+16%). Shavers were weak in week 32 at -7%. PTVs were flat.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 32 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

About **gfknewron**

Fact of the week

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Great Britain

France

Italy

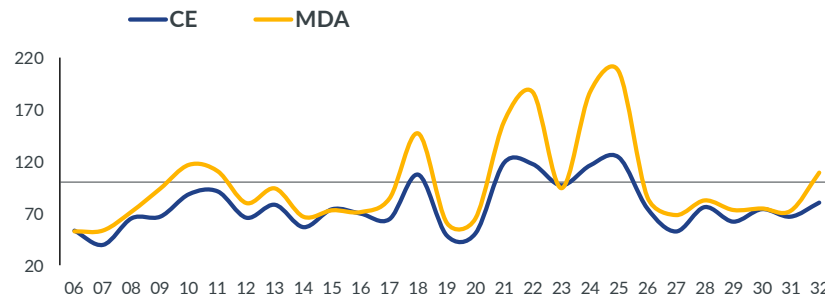
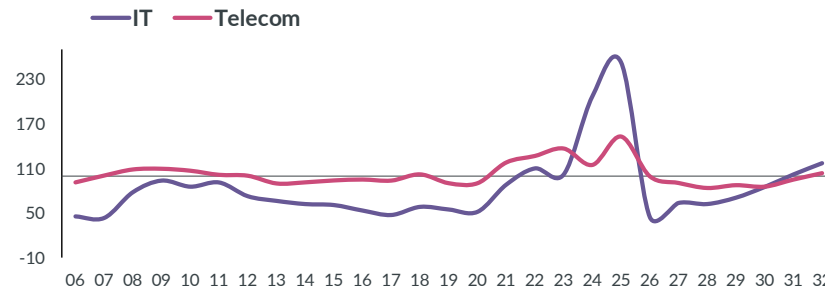
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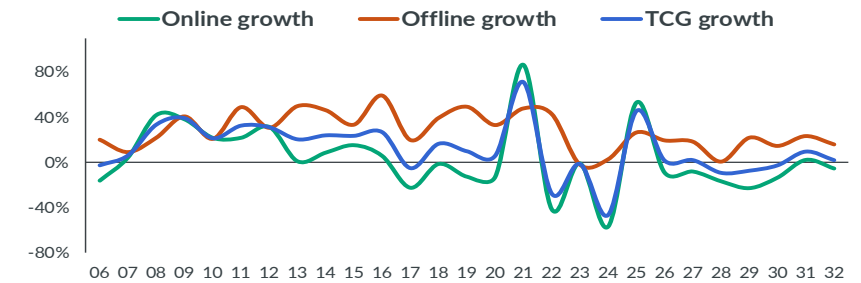
Brazil

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 32 (Aug 05 – Aug 11)

- Traditional retail at +16% lifted the total TCG market to a plus of 2%. Online sales at -6% were not able to cloud this result.
- Smartphones at +5% 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 3%.
- While PTV was the weakest of all categories, losing 15%, cooling declined by 5%. Washing machines gained 3%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 32 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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