

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 218
Week 33 of 2024
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Fact of the week

Germany

Great Britain

France

Italy

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Fact of the Week

Rate of innovation for key categories in TCG, H&L, Auto and Optics sectors

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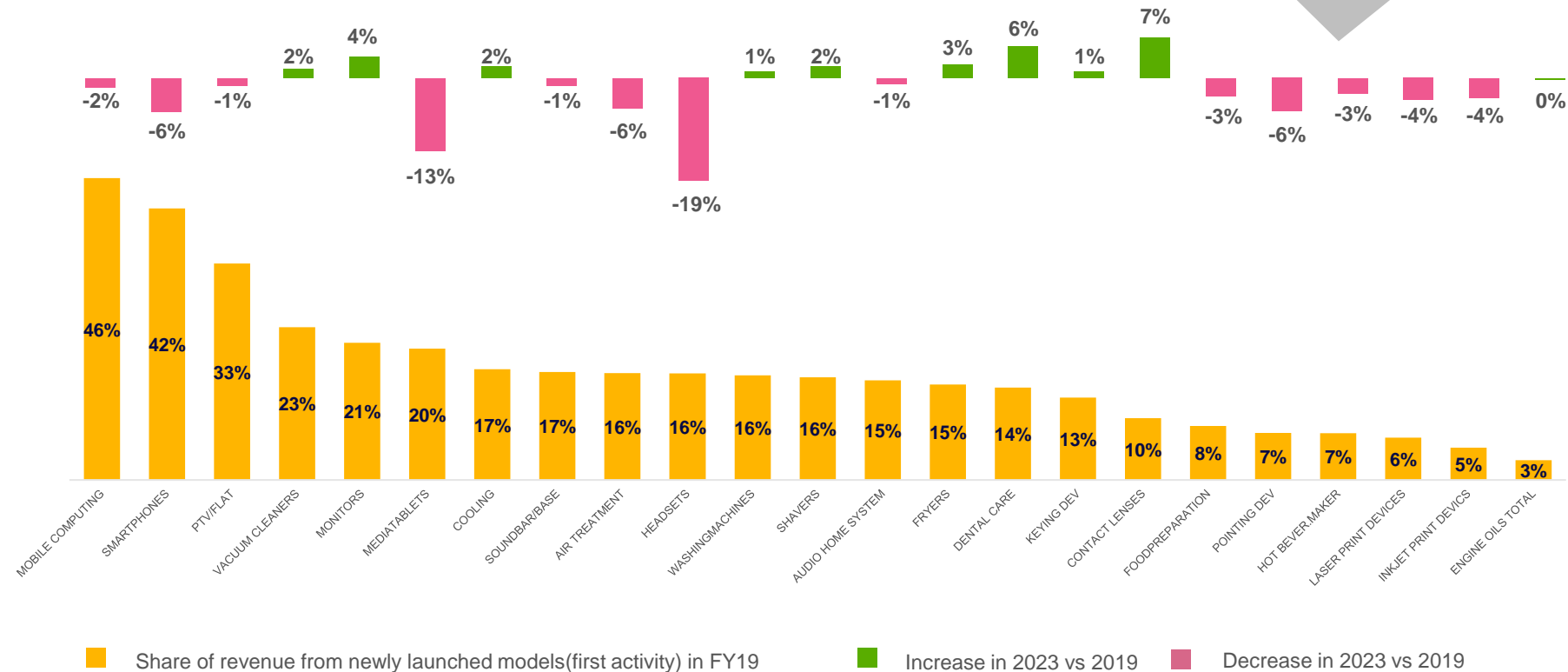
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Percentage point difference in revenue generated from newly launched models in 2023 vs 2019

Share of revenue from newly launched models in 2023*



Hypothesis:

Mostly digital products but also @home categories from pandemic period which were bought heavily at the onset of the pandemic saw less new launches in 2023 which could be due to

1. Innovations being low
2. Replacement cycle not yet reached → low number of new launches
3. Consumers are holding onto their products longer
4. Market saturation

SOURCE: Market Intelligence Sales Tracking; Retailer Market; 2019 – 2023; Categories: 22 Core TCG categories

*Share of revenue from new models in 2023 = Share of revenue from new models in 2019 +/- increase by 2023. Share of revenue from new models is calculated using first activity

Weekly retail insights from the Point of Sale

Spotlight on Germany

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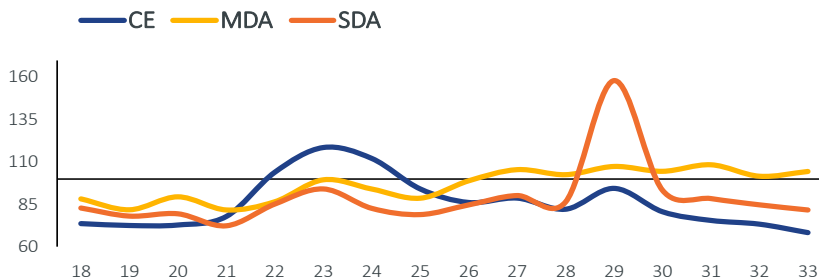
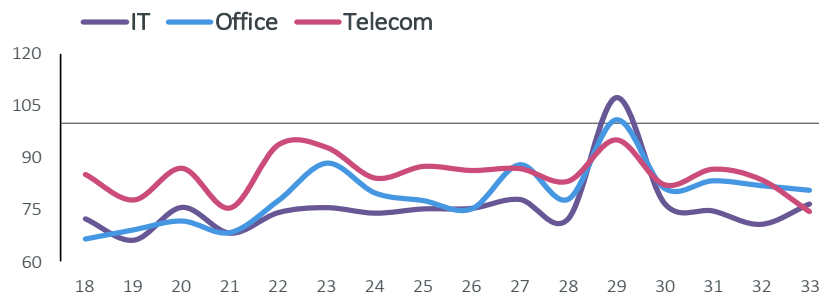
Spain

Japan

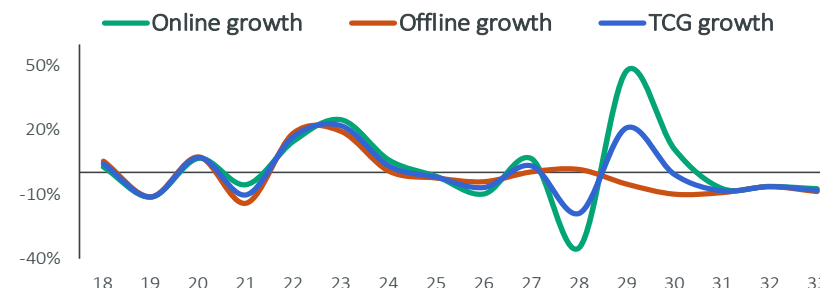
Brazil

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 33 (Aug 12 – Aug 18)

- Close trends for online sales (-7%) and traditional retail (-9%) delivered an average of -8% for the total TCG market.
- While monitors and inkjet printers experienced slight upticks of 3% and 2%, desk computing and mobile computing lost 9% and 8%, respectively. Laser printers were flat. Smartphones slumped at -14%.
- CE categories also saw losses with soundbars at -23% and PTV down by 5%. While air treatment stood out at +51%, all other MDA/SDA categories posted moderate ups and downs.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 33 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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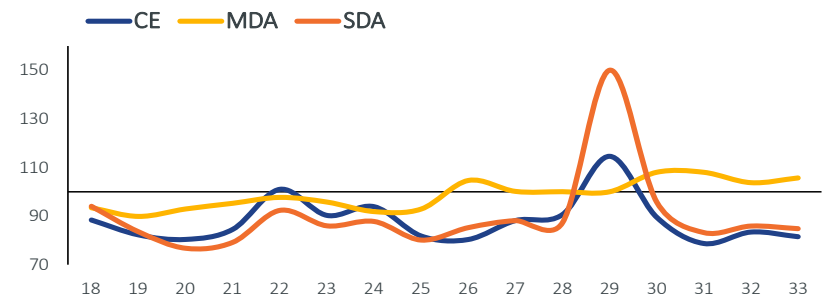
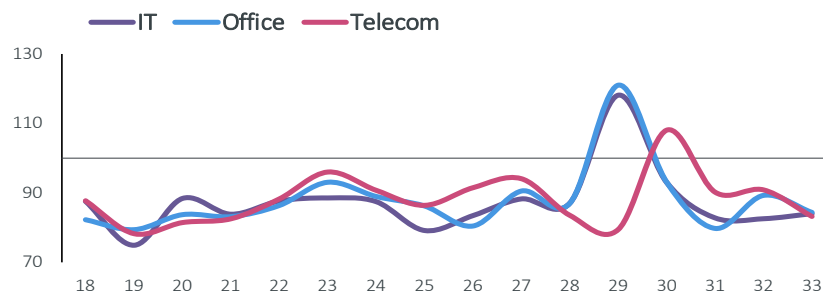
Spain

Japan

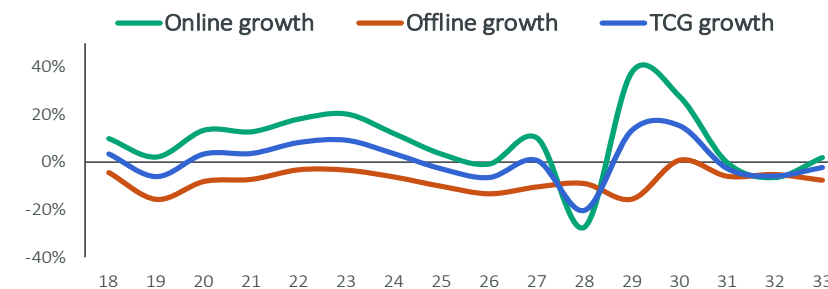
Brazil

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 33 (Aug 12 – Aug 18)

- Traditional retail at -8% dragged the total TCG market down by 2%. Online sales at +2% were not able to compensate.
- A mixed picture for IT/Office products saw mice in the lead at +14%. Media tablets and laser printers marked the other end of the scale at -18%. Smartphones saw a tiny uptick of 1%.
- CE products too posted wide-ranging results, with audio home systems at +8% and PTV at -13%. MDAs/SDAs also delivered an ambivalent performance with food preparation in the lead at +15% and dental care at -8%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 33 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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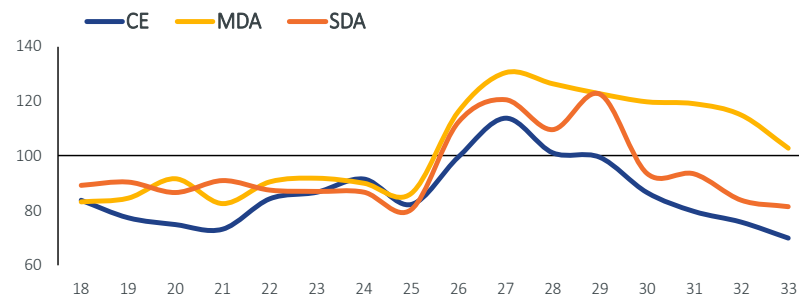
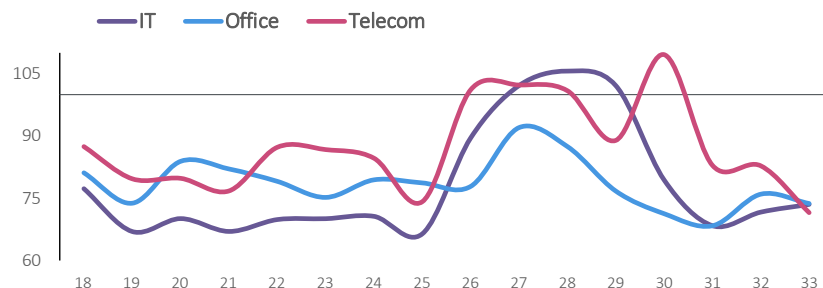
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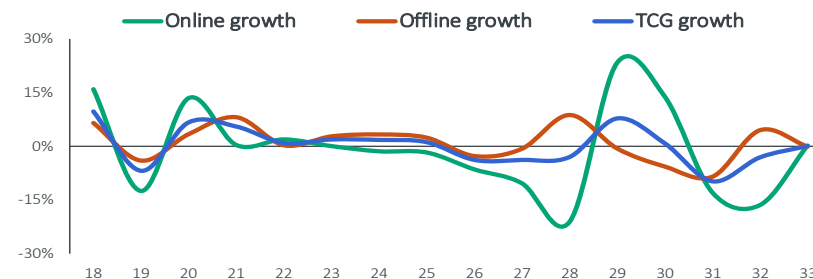
Brazil

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 33 (Aug 12 – Aug 18)

- Flat online sales and traditional retail led to a flat TCG market.
- IT/Office products posted a mixed picture with keyboards at one end of the scale at +8% and mobile computing at the other at -13%. Smartphones saw a small decline of 1%.
- Except for headsets at +7%, CEs suffered as well, with soundbars posting the highest decrease at -30% and audio home systems -23%. Food preparation (-6%) and washing machines (-3%) were the only negative categories in DA. Air treatment stood out at +53%.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 33 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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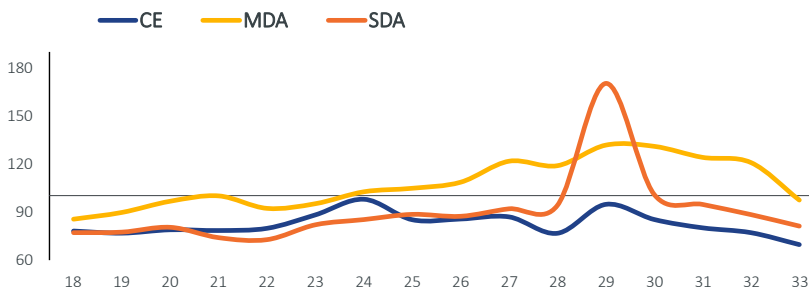
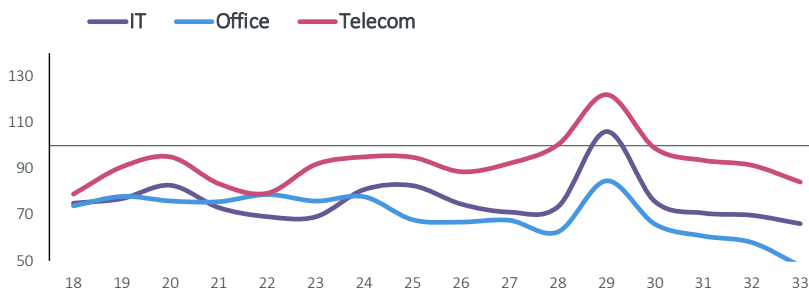
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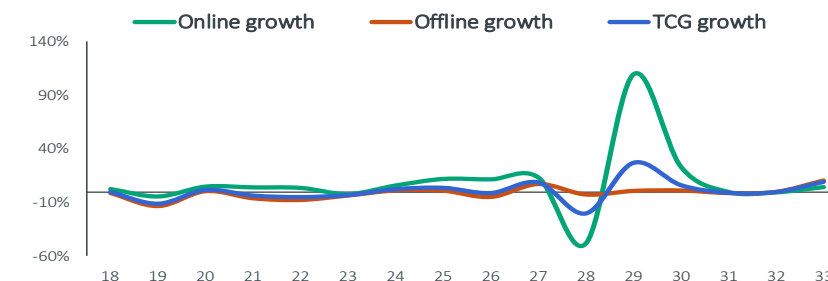
Brazil

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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 33 (Aug 12 – Aug 18)

- Traditional retail at +11% lifted the total TCG market to a plus of 9%. Online sales at +4% added to it.
- IT/Office products delivered moderate ups and downs with laser printers leading at +22% and desk computing last at -7%. Smartphones posted good results at +9%.
- Within the overall positive scenario for MDA/SDA, air treatment posted the highest uplift at +117%. Dental care claimed second place at +34%. Vacuum cleaners presented the smallest increase at 1%. PTV won 7%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 33 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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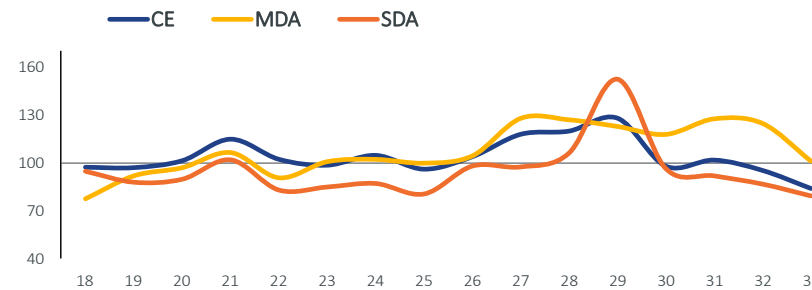
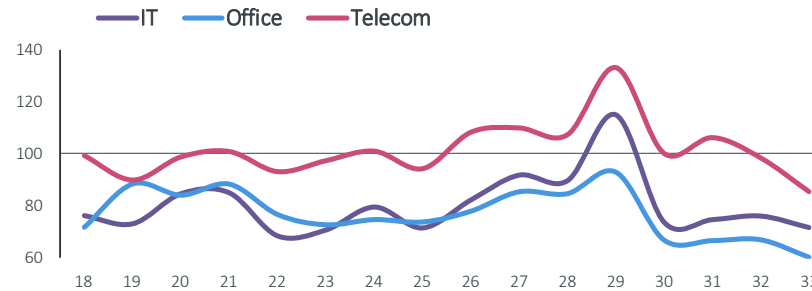
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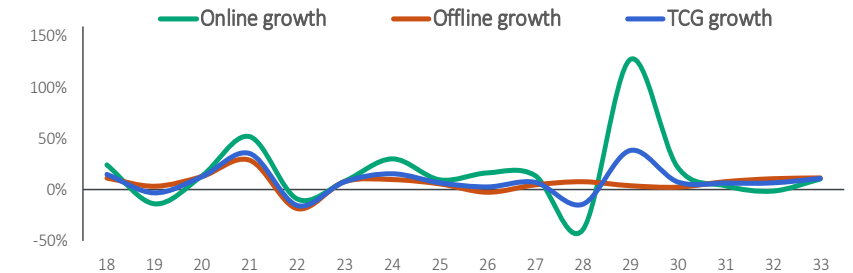
Brazil

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 33 (Aug 12 – Aug 18)

- Close trends for online sales (+10%) and traditional retail (+12%) delivered an average of +11% for the total TCG market.
- The positive picture for IT/Office categories saw laser printers in the lead at +14% and mobile computing second place at +11%. Smartphones experienced good growth at +11%.
- While audio home systems decelerated at -16%, PTV rose 17%. MDAs/SDAs ranged between +18% for vacuum cleaners and +6% for shavers.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 33 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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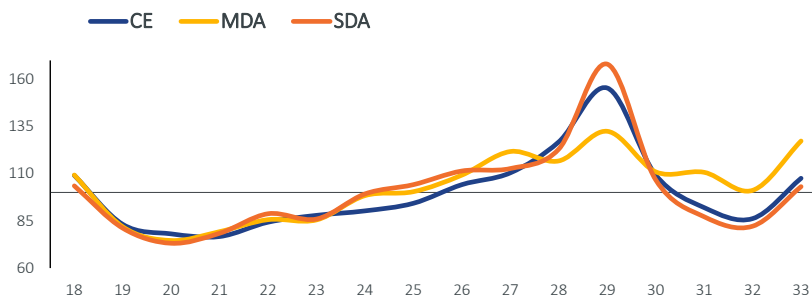
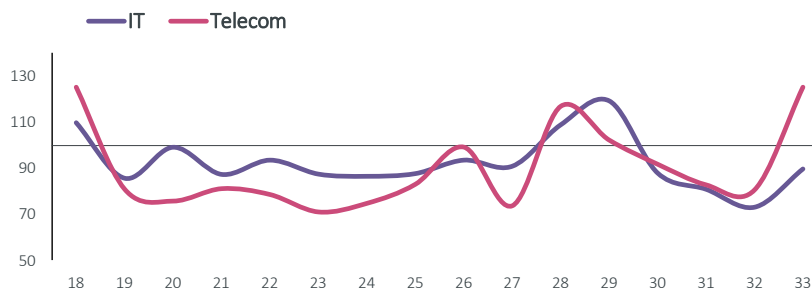
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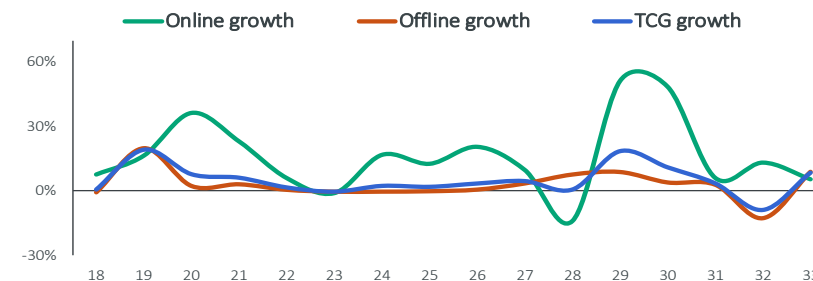
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 33 (Aug 12 – Aug 18)

- Traditional retail delivered a plus of 9%, leading to +8% for the total TCG market. Online sales at +6% were unable to impact the total result visibly.
- Week 33 saw +9% for media tablets and +3% for mobile computing. Smartphones accelerated at +21%.
- CE categories posted slight ups and downs with +12% for headsets and -12% for soundbars. Except for air treatment at -3%, all other MDA/SDA categories delivered growth. Food preparation and dental care led at +21%. Cooling was flat.



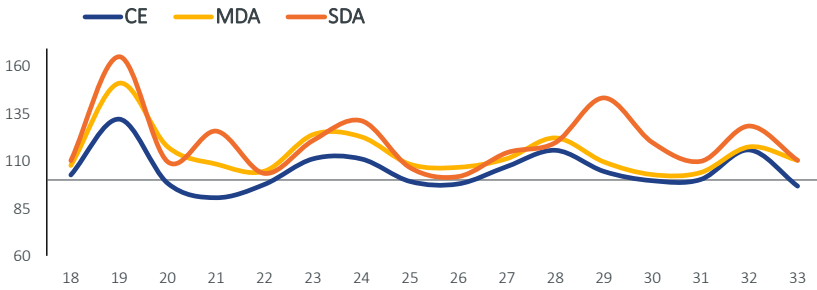
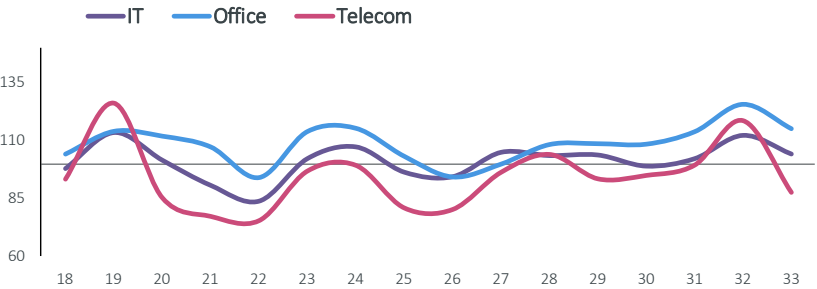
SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 33 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile computing, media tablets – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and 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

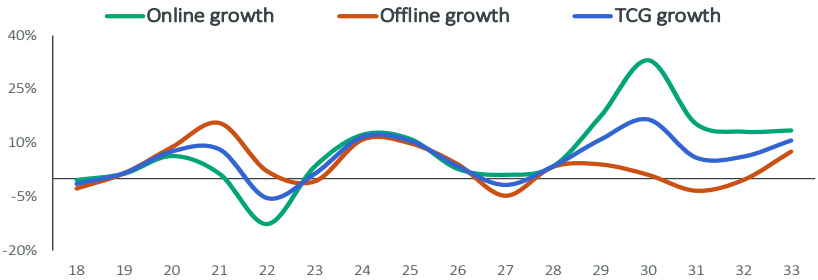
Spotlight on Brazil

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



Key take aways in calendar week 33 (Aug 12 – Aug 18)

- Acceleration of online sales of +14% and a plus of 8% for traditional retail led to +11% for the total TCG market.
- Most IT/Office products posted double-digit growth rates with desk computing in the lead at +23%. Mobile computing delivered +5%. Smartphones were up 5% as well.
- Except for PTV at +7%, there was double-digit growth for all other MDA/SDA/CE categories. Washing machines led at +28% and vacuum cleaners took second place at +23%. Cooling at +21% delivered a good result as well.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 33 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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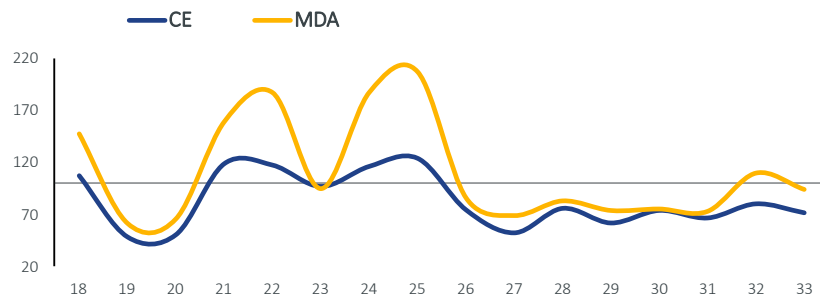
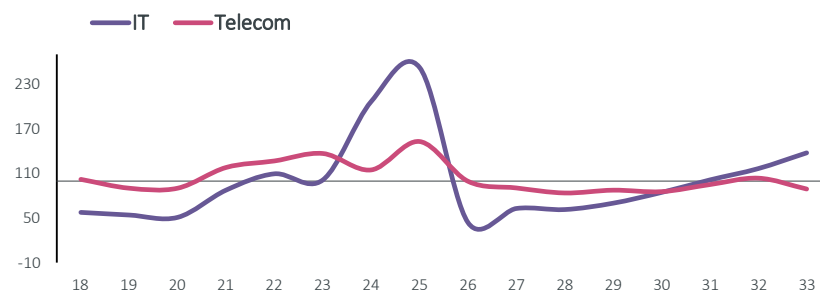
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 33 (Aug 12 – Aug 18)

- Strong decline of online sales (-25%) led to -13% for the total TCG market. Traditional retail at +13% did not compensate.
- Smartphones at -18% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing posted a plus of 5%.
- While cooling was the weakest of all categories, losing 20%, washing machines declined by 10%. PTVs were flat.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 33 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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