

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 219
Week 34 of 2024
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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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Fact of the Week

Consumer spending on FMCG and Tech & Durables increased in EU6 in 23/24

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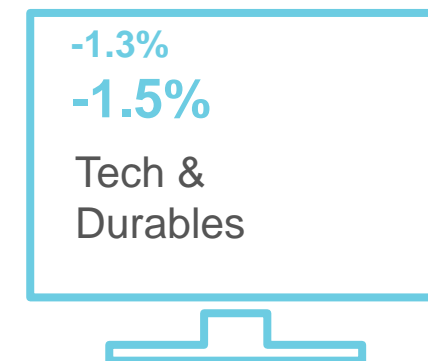
Brazil

China

Sales Value EUR | growth rate YoY in % | EU6 | Year To Date: Q1 2024 vs FY 2023

Increased FMCG prices and revenues pressure T&D budgets

2023: +5.8%
Q1 24: +2.7% consumer spending



The Full View:
As cost-of-living crisis drives FMCG spending, savings are made on T&D products

Weekly retail insights from the Point of Sale

Spotlight on Germany

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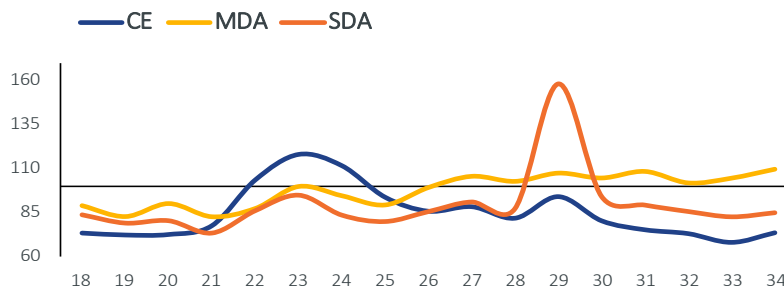
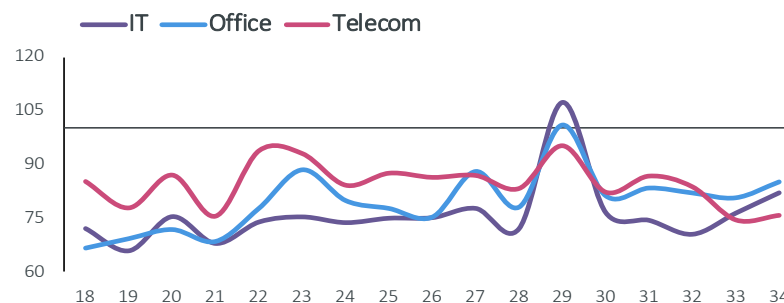
Spain

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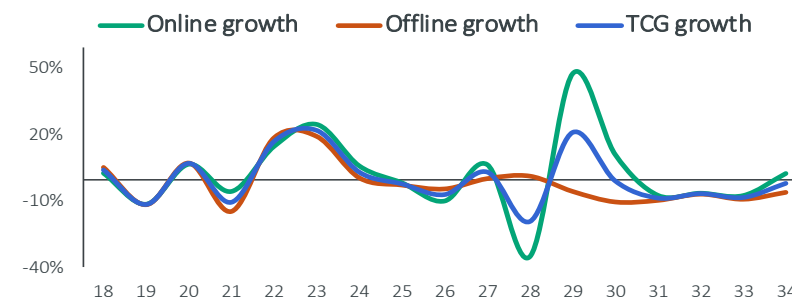
China

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 34 (Aug 19 – Aug 25)

- Traditional retail at -6% dragged the total TCG market down by 2%. Online sales at +3% was not able to compensate.
- While monitors and inkjet printers experienced growth of 5% and 10%, mobile computing and laser printers lost 5% and 3%. Desk computing was down 1%. Smartphones lagged at -3%.
- Except for audio home systems at +8%, CE categories also witnessed losses with PTV down by 2%. While air treatment stood out at -49%, MDA saw moderate losses. SDAs grew with food preparation and dental care ahead at +10%.

SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 34 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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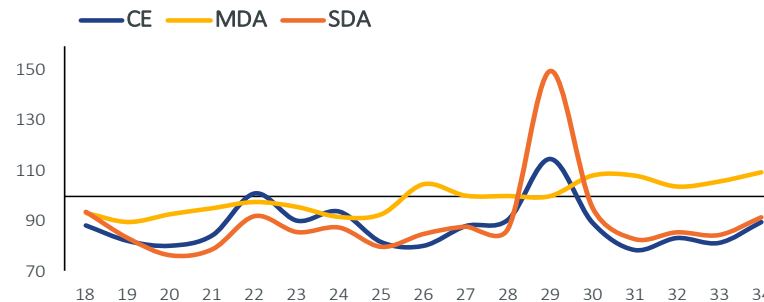
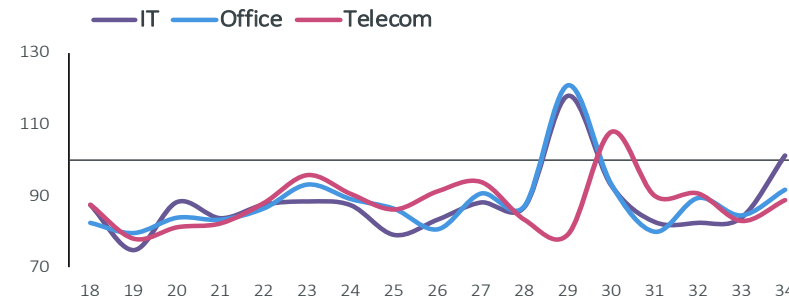
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Japan

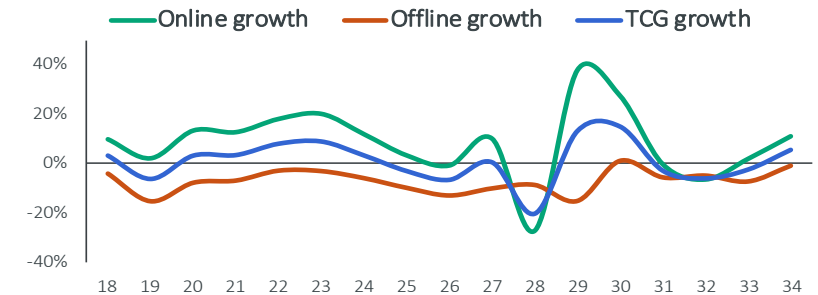
Brazil

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 34 (Aug 19 – Aug 25)

- Online sales at +11% lifted the total TCG market by 6%. Traditional retail at -1% did not cloud this result.
- The overall positive picture for IT/Office products saw mice in the lead at +26% and monitors delivering +17%. Media tablets marked the other end of the scale, at -11%. Smartphones experienced growth of 12%.
- CE products saw a mixed picture with headsets at +12% and PTV at -3%. MDAs/SDAs grew with hot beverage makers out in front at +17%. Washing machines were flat. The only category with a negative trend (-3%) was vacuum cleaners.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 34 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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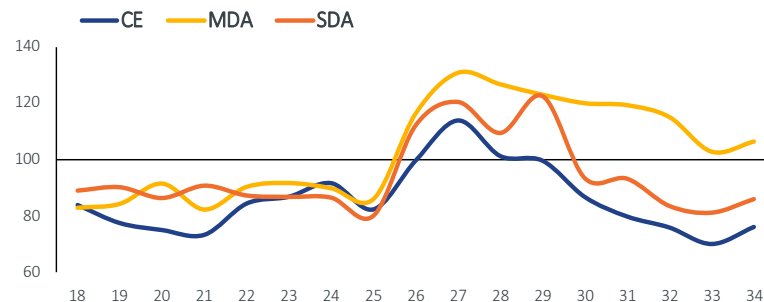
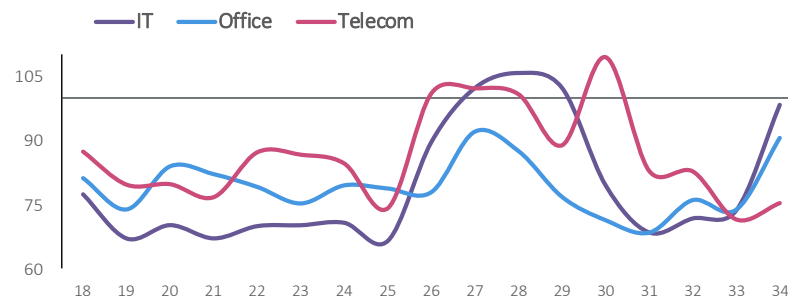
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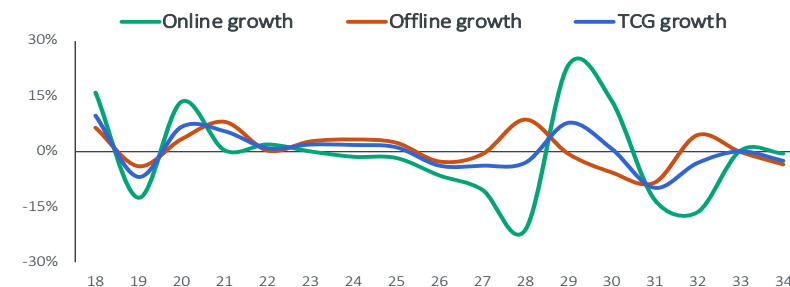
Brazil

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 34 (Aug 19 – Aug 25)

- Downward trends for online sales (-1%) and traditional retail (-4%) led to a minus of 3% for the total TCG market.
- IT/Office products posted a mixed picture with keyboards at one end of the scale at +15% and laser printers at the other end at -9%. Smartphones experienced a decline of 6%.
- Except for headsets at +3%, CE categories declined, with soundbars posting the highest decrease at -12%. The ambivalent performance of MDAs/SDAs saw vacuum cleaners in the lead at +22% and dental care at the other end of the scale at -21%. Air treatment stood out at -73%.



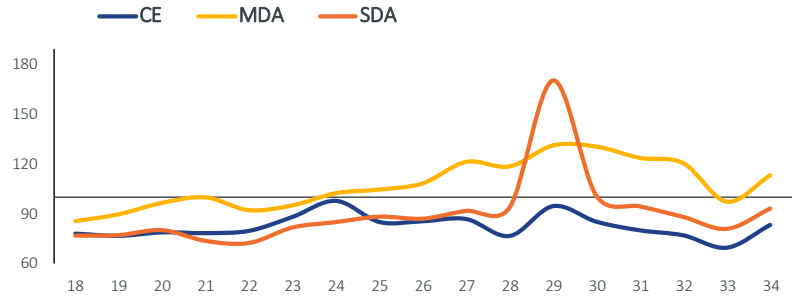
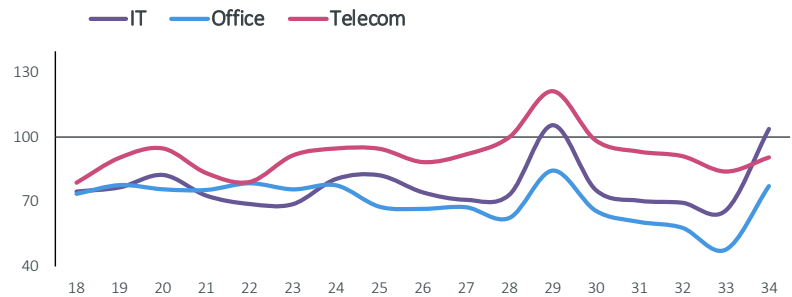
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 34 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

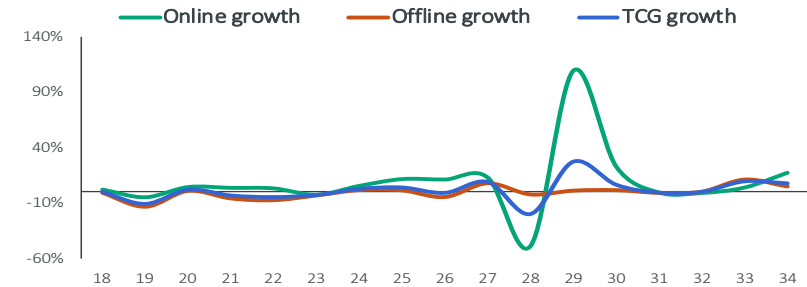
Spotlight on Italy

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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 34 (Aug 19 – Aug 25)

- Online sales at +18% lifted the total TCG market to a plus of 8%. Traditional retail at +5% added to it.
- IT/Office products delivered moderate rises and falls. Laser printers led at +15% with desk computing at the other end of the scale at -7%. Smartphones posted good results of +11%.
- Within the overall positive scenario for CE/MDA/SDA, food preparation posted the highest uplift at +27%. Hot beverage makers claimed second place at +25%. Soundbars presented the smallest increase at 1%. PTV won 9%. Only air treatment recorded a substantial loss of 47%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 34 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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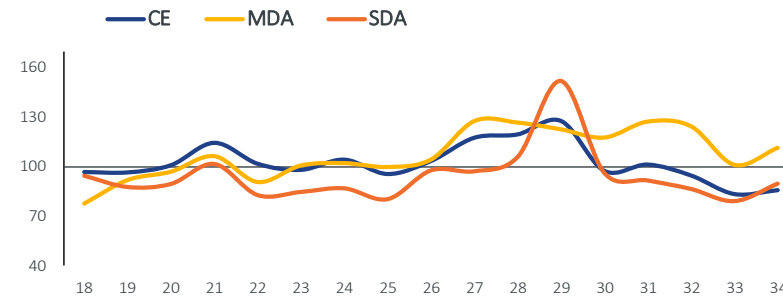
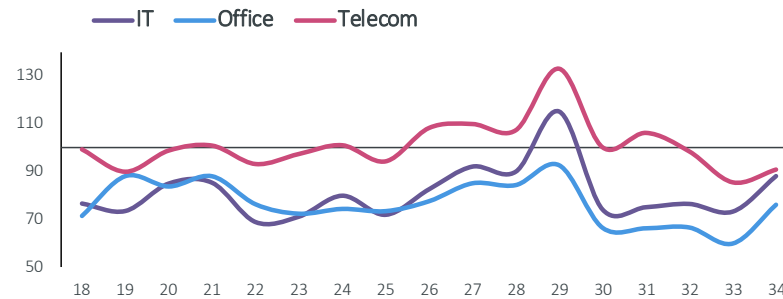
Spain

Japan

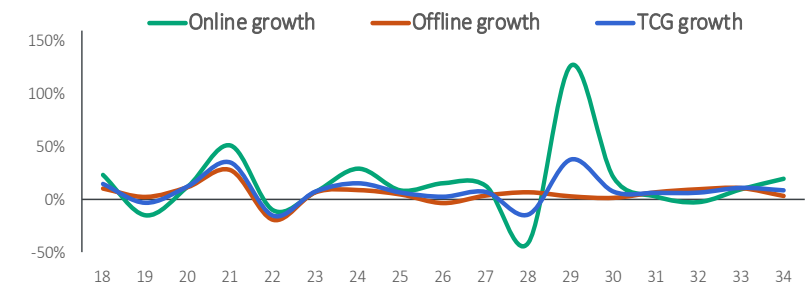
Brazil

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 34 (Aug 19 – Aug 25)

- Online sales at +21% pushed the total TCG market to +9%. Traditional retail added to it by delivering +5%.
- The positive picture for IT/Office categories saw desk computing lead at +22% and laser printers second place at +14%. Smartphones experienced good growth at +13%.
- While audio home systems decelerated at -6%, PTV was up 18%. Cooling was the only category with a negative trend (-5%) within MDAs and SDAs. Hot beverage makers posted +23%. Vacuum cleaners came next, delivering +15%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 34 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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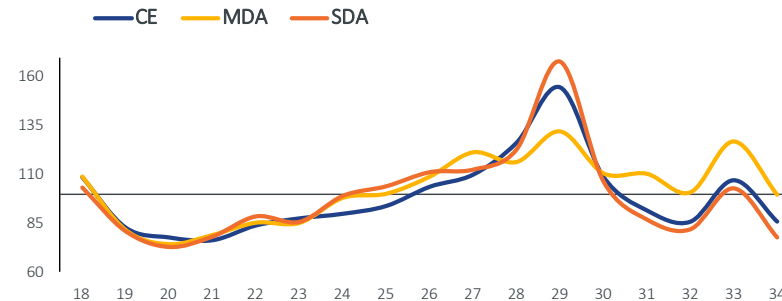
Spain

Japan

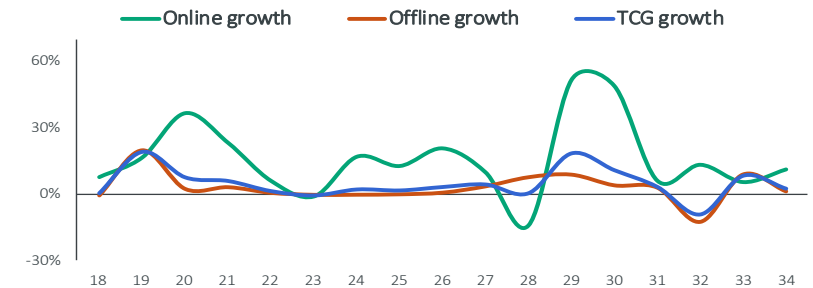
Brazil

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 34 (Aug 19 – Aug 25)

- Online sales delivered a plus of 11%, leading to +3% for the total TCG market. Traditional retail at +1% was unable to impact the total result visibly.
- Week 34 saw +8% for media tablets while mobile computing was flat. Smartphones accelerated at +14%.
- Except for headsets at +15%, CE products posted moderate downshifts with -6% for soundbars and -1% for PTV. MDA/SDA categories delivered growth with food preparation in the lead at +16%. Vacuum cleaners were flat. Only air treatment and cooling experienced negative trends at -19% and -6%.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 34 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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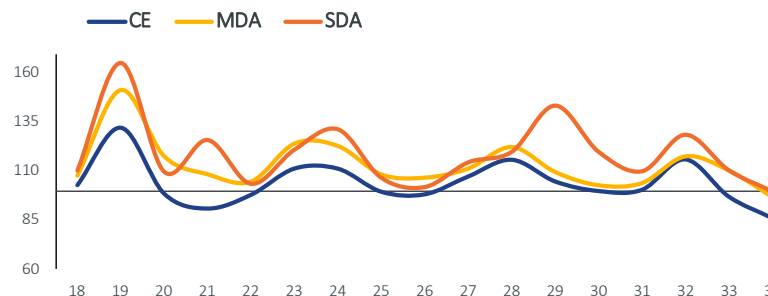
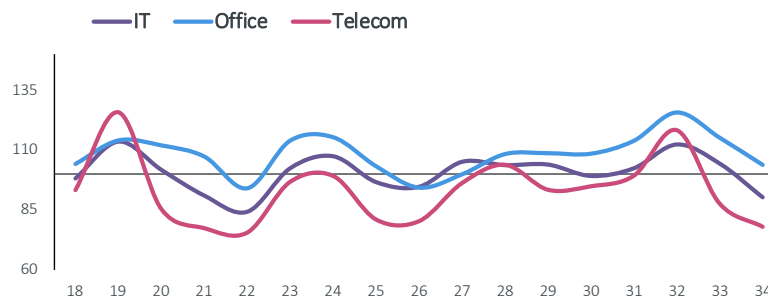
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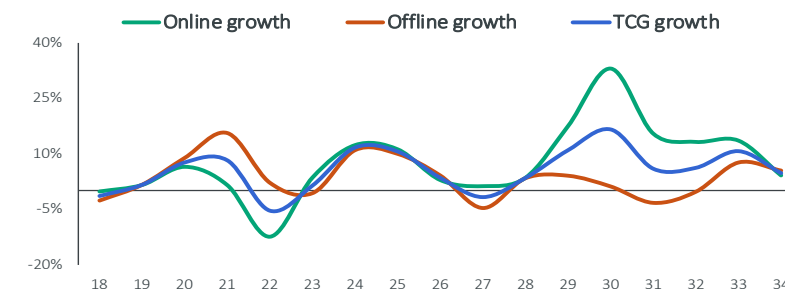
Brazil

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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 34 (Aug 19 – Aug 25)

- Close trends of +4% for online sales and +5% for traditional retail led to an average growth of 5% for the total TCG market.
- Most IT/Office products posted positive trends with inkjet printers in the lead at +13%. Mobile computing delivered -1%. Smartphones were down 1% as well.
- There was double-digit growth for most MDA/SDA/CE categories with audio home systems in the lead at +22% and washing machines claiming second place at +20%. PTV at +3% delivered the smallest growth.



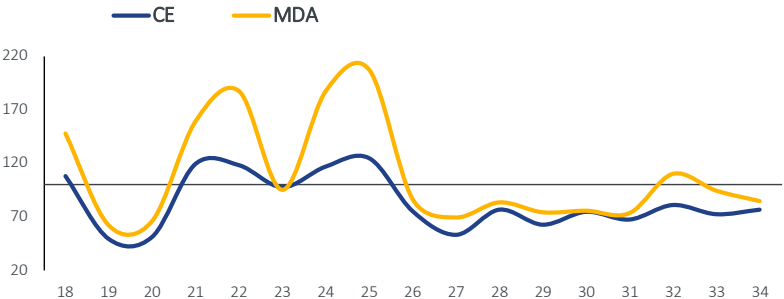
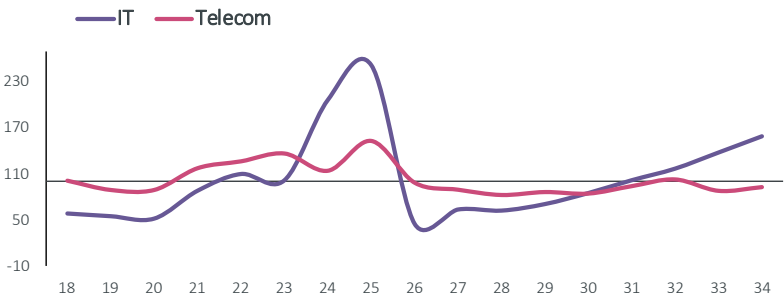
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 34 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

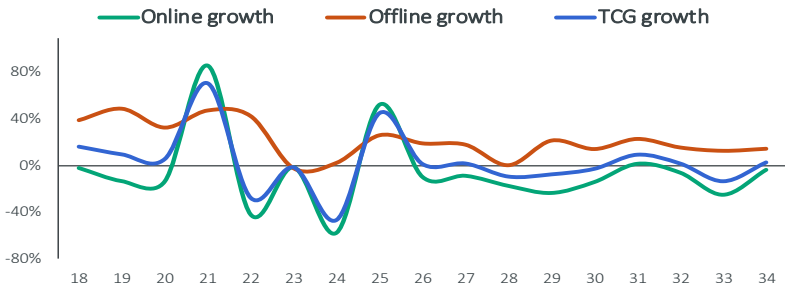
Spotlight on China

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



Key take aways in calendar week 34 (Aug 19 – Aug 25)

- Online sales decelerated by 3% but traditional retail at +15% lifted the total TCG market to a plus of 3%.
- While mobile computing delivered growth of 7%, smartphones were flat.
- Cooling and washing machines experienced double-digit growth in week 34, at +12% and +10% respectively. PTV was weak at +2%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 34 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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