

# State of Tech & Durables

Weekly trends and insights for  
the tech and durables market

Edition 220  
Week 35 of 2024  
Powered by **gfk**newron

**NielsenIQ**



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## About gfknewron

### 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

*Smart Mobile Phones & Phablets: For far more than half of the revenue sold, marketing claims 3 or more eco messages – and those products are the growth engine of the market.*

About **gfknewron**

**Fact of the week**

Germany

Great Britain

France

Italy

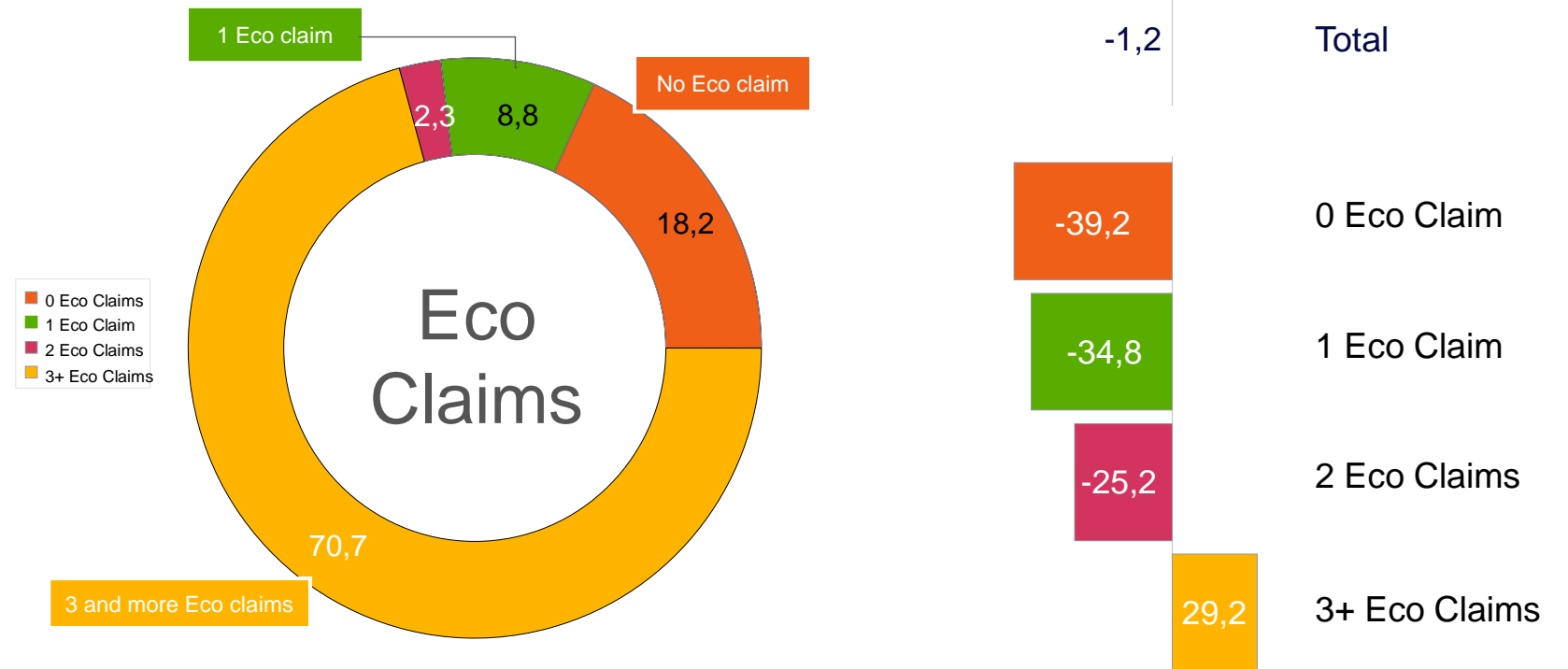
Spain

Japan

Brazil

China

Jan – Dec 2023 / shares & growth in Sales value (NSP) EUR



# Weekly retail insights from the Point of Sale

## Spotlight on Germany

About **gfknewron**

Fact of the week

**Germany**

Great Britain

France

Italy

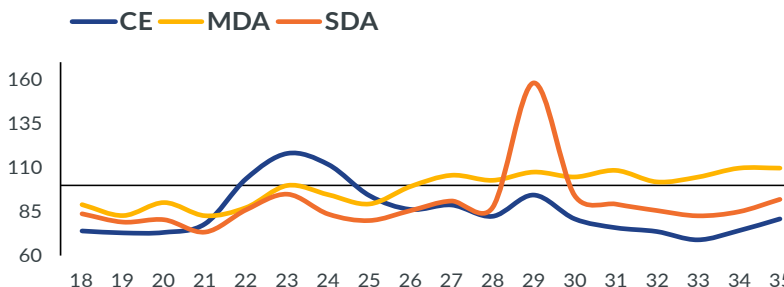
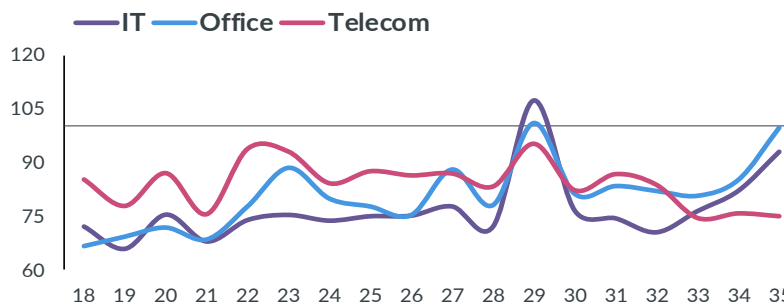
Spain

Japan

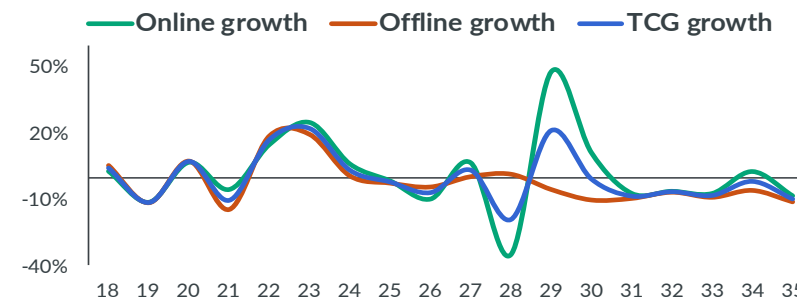
Brazil

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 35 (Aug 26 – Sep 01)

- -8% for online sales and -11% for traditional retail led to an average of -10% for the total TCG market.
- IT/office products didn't perform well with desk computing at -14%. Mobile computing and inkjet printers posted -3% and laser printers were flat. Smartphones slumped at -16%.
- CE categories also witnessed losses with soundbars posting -20% and PTV down by 9%. While cooling and dental care were flat, the other MDAs/SDAs delivered a mixed picture with shavers at +17% and hot beverage makers at -10%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 35 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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Fact of the week

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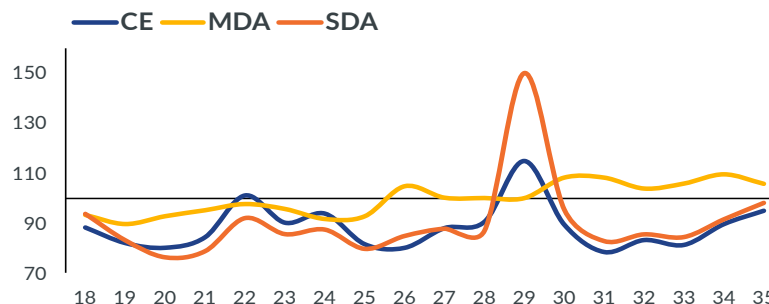
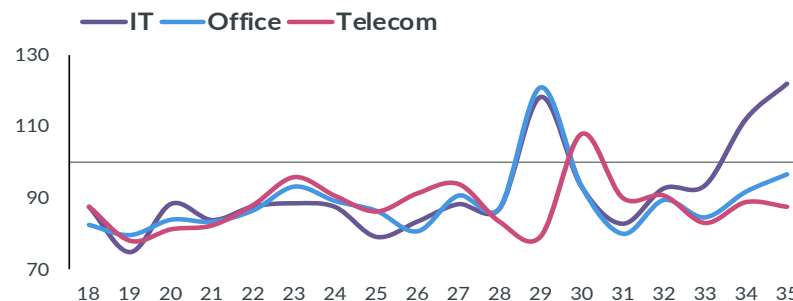
Spain

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 35 (Aug 26 – Sep 01)

- Traditional retail experienced a downswing of 1% but online sales at +9% lifted the total TCG market to a plus of 4%.
- Within IT/office products, only mobile computing and laser printers delivered negative trends of -2% and -15% respectively. Mice were out in front at +25%. Smartphones experienced an upswing of 7%.
- CE/MDA/SDA products delivered an overall positive picture with only PTV (-6%), soundbars (-4%), and vacuum cleaners (-1%) negative. Audio home systems saw +23%, headsets +15%, and food preparation +14%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 35 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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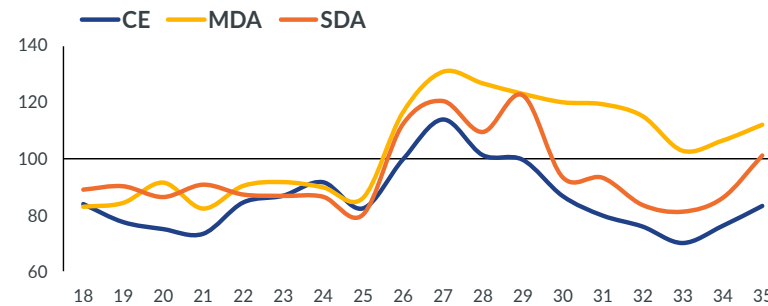
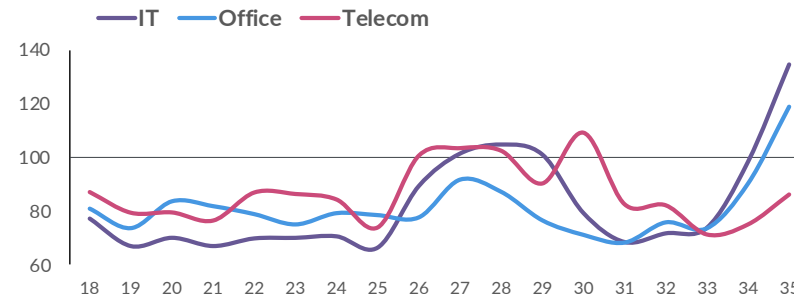
Spain

Japan

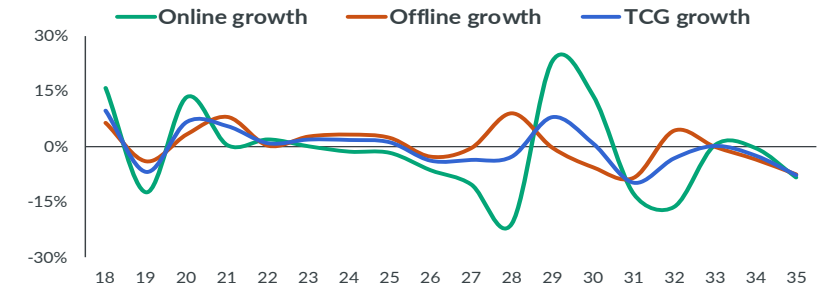
Brazil

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 35 (Aug 26 – Sep 01)

- Online sales and traditional retail both experienced a downswing of 8% which naturally led to -8% for total TCG.
- IT/office categories mostly posted negative trends with laser printers leading at -16%. Media tablets claimed +4%. Smartphones experienced a decline of 8%.
- CEs suffered with soundbars posting -28% and audio home systems at -27%. TVs were down 21%. Within MDAs/SDAs, air treatment (+13%), vacuum cleaners (+10%), and shavers (+5%) were the only categories to post a plus. Food preparation and dental care were both down 18%.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 35 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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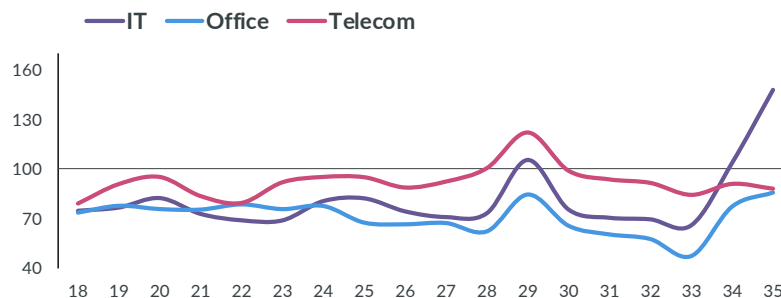
Spain

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 35 (Aug 26 – Sep 01)

- Close trends of +1% for online sales and +2% for traditional retail led to an acceleration of 2% for the total TCG market.
- Media tablets at +22% was one of the drivers of this development while inkjet printers at -17% dragged the average down. Smartphones were flat.
- It is rare to report so many flat categories: PTV, cooling, washing machines, and shavers. Air treatment stood out at +22% while all other CE/MDA/SDA products posted moderate falls and gains.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 35 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

About **gfknewron**

Fact of the week

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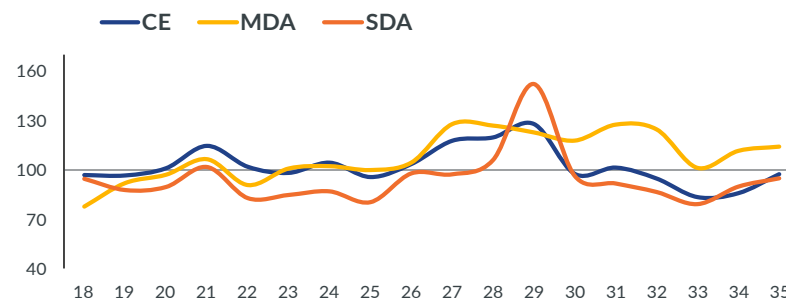
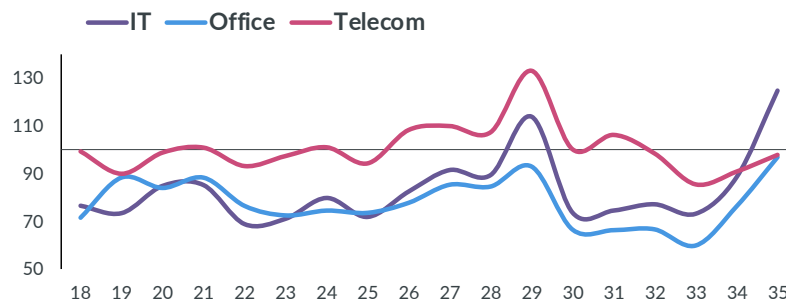
**Spain**

Japan

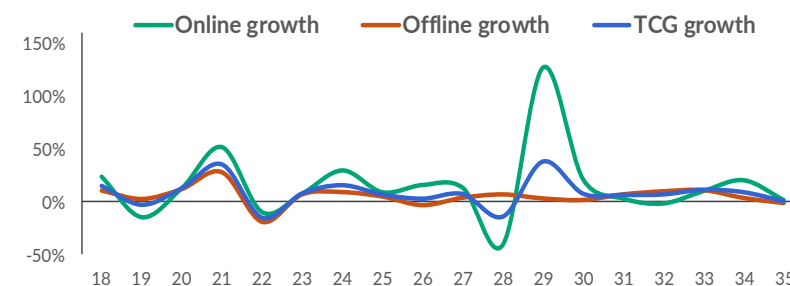
Brazil

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 35 (Aug 26 – Sep 01)

- Online sales experienced +2% and flat traditional retail delivered +1% for the total TCG market.
- Except for media tablets at +1%, all other IT/office products delivered negative trends with inkjet printers in the lead at -12%. Smartphones experienced good growth at +10%.
- While audio home systems decelerated at -26%, PTV was up 2%. Except for flat washing machines, MDAs/SDAs were positive throughout, ranging between +8% for shavers and +2% for cooling and vacuum cleaners.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 35 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

About **gfknewron**

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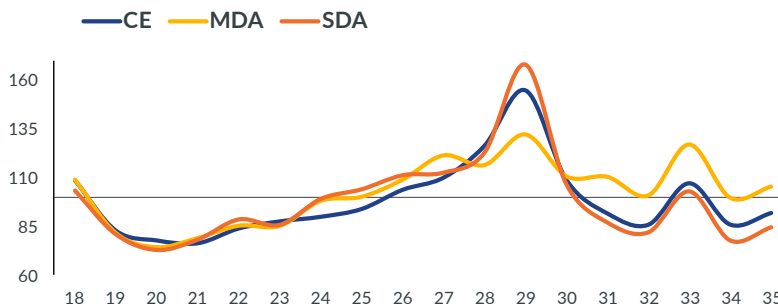
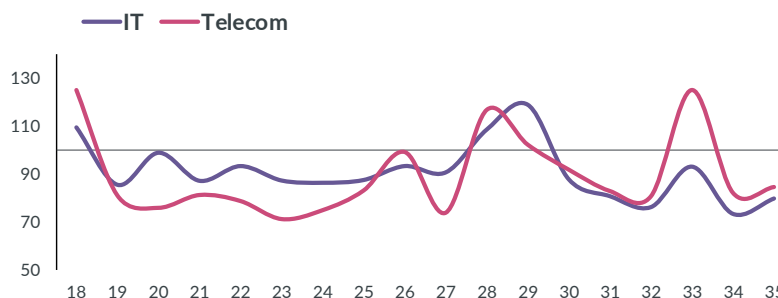
Spain

**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 35 (Aug 26 – Sep 01)

- Traditional retail delivered a minus of 5%, leading to -3% for the total TCG market. Online sales at +7% was unable to impact the total result visibly.
- Week 35 saw +17% for media tablets and mobile computing lagging at -9%. Smartphones accelerated at +24%.
- Headsets at -26% was the worst-performing category in week 35. TVs lagged at -7%. MDA/SDA results were mixed, with food preparation (+19%) and hot beverage makers (+18%) out in front and cooling at the other end of the scale at -12%.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 35 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**

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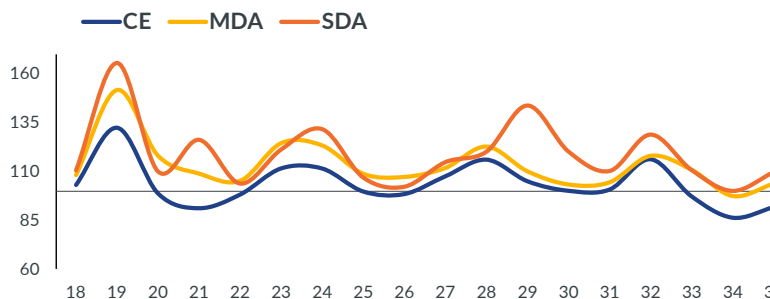
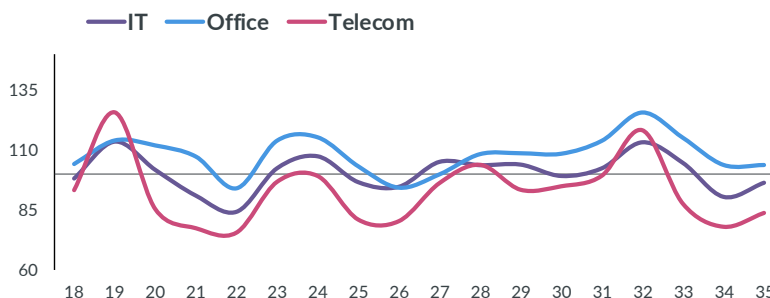
Spain

Japan

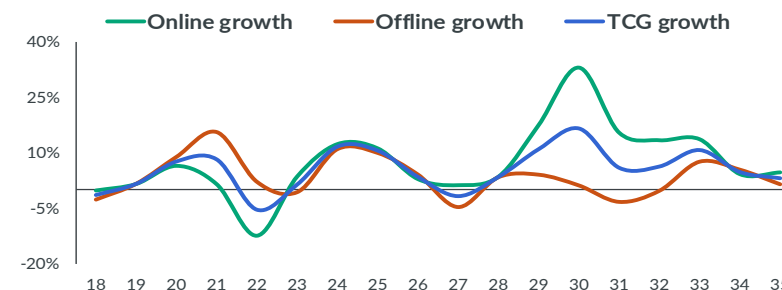
**Brazil**

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 35 (Aug 26 – Sep 01)

- Acceleration of online sales of +5% and a plus of 1% for traditional retail led to +3% for the total TCG market.
- Except for mobile computing at -2%, all other IT/office products grew with inkjet printers in the lead at +18% and desk computing at +17%. Smartphones lagged at -8%.
- CE/MDA/SDA products delivered growth throughout. The highest scores were for food preparation (+36%) and audio home systems (+30%) while shavers, PTVs, and hot beverage makers were a little behind at +7%, +3%, and +2%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 35 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**

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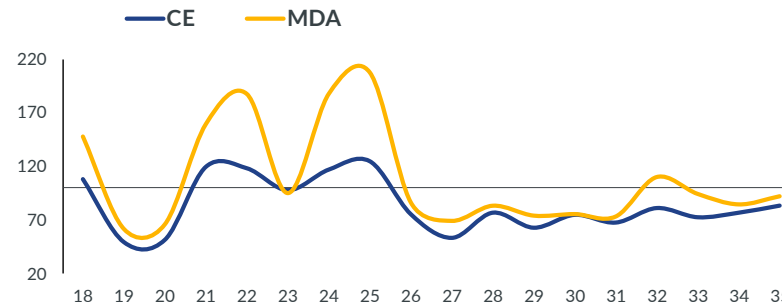
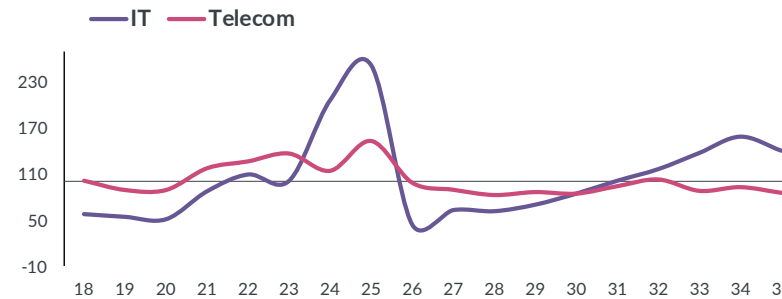
Spain

Japan

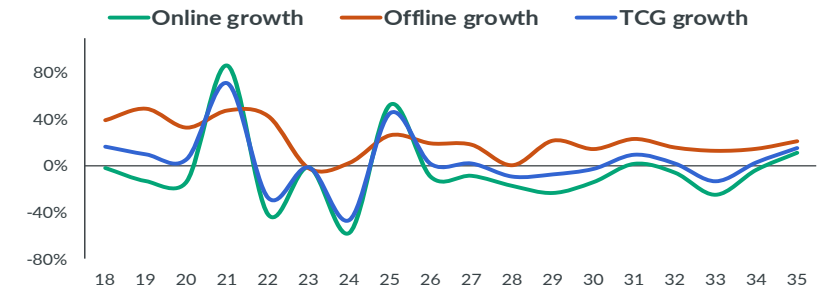
Brazil

**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 35 (Aug 26 – Sep 01)

- A strong uplift for traditional retail (+21%) and growth of 11% for online sales pushed the total TCG market to +15%.
- In week 35, cooling (+34%) and washing machines (+24%) were the growth drivers while PTV was a little weaker at +7%.
- Smartphones also performed well at +17%, pushing the total TCG market. This is partly due to their high share in the product group basket. Mobile computing delivered a +4%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 35 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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