

# State of Tech & Durables

Weekly trends and insights for  
the tech and durables market

Edition 221  
Week 36 of 2024  
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**NielsenIQ**



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## About gfknewron

### Fact of the week

Germany

Great Britain

France

Italy

Spain

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- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
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# Fact of the Week

*How innovations drive ASPs: Routers and Wireless Mesh in Germany*

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**Fact of the week**

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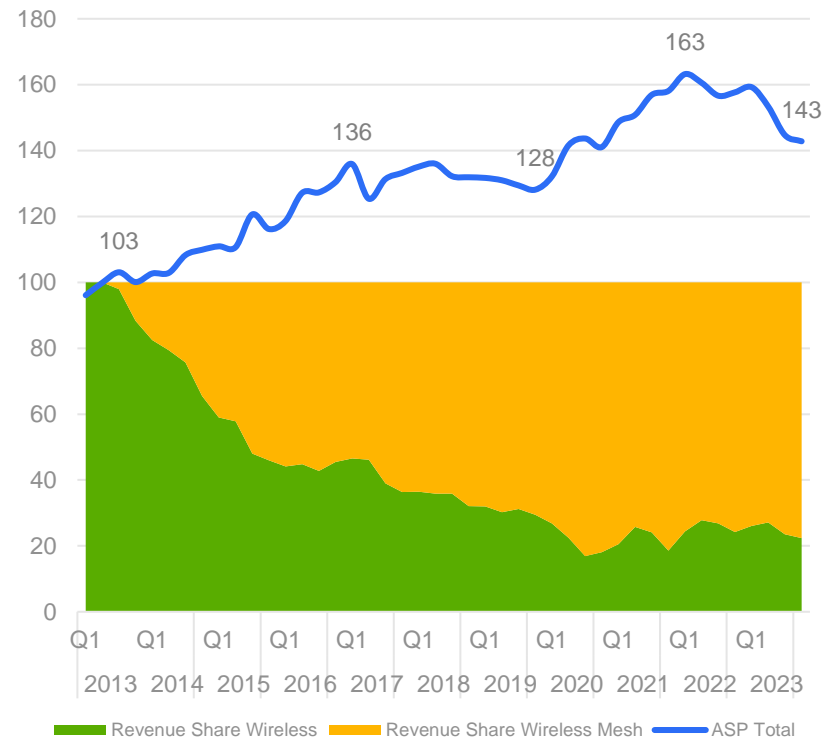
Spain

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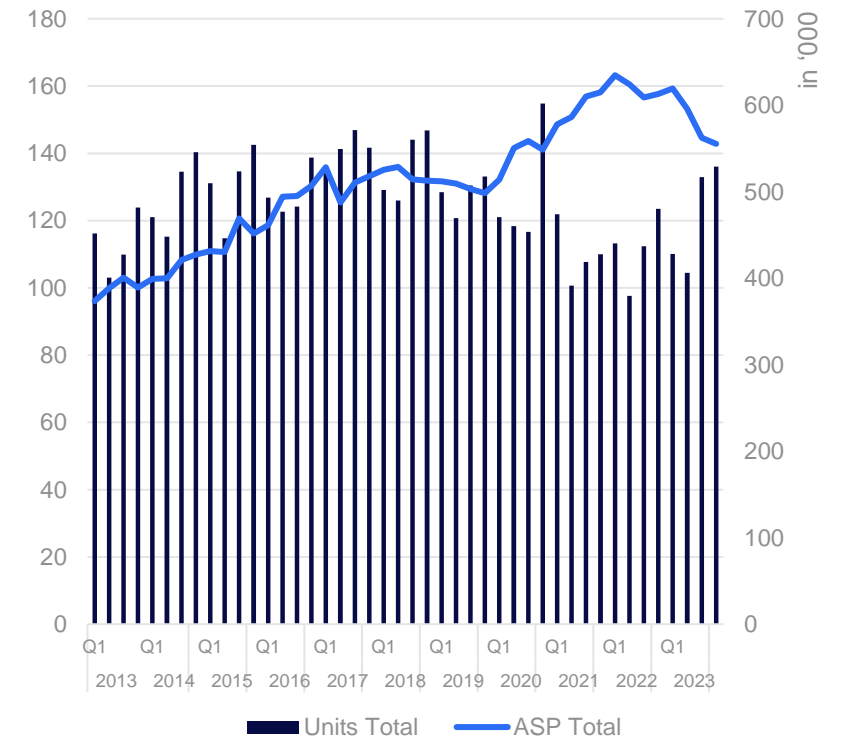
Brazil

China

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



With the introduction of (PBX) routers supporting Mesh, ASPs started to increase steadily. Not only revenue and ASPs, but units demand was driven by new Mesh technology as well.



# Weekly retail insights from the Point of Sale

## Spotlight on Germany

About **gfknewron**

Fact of the week

**Germany**

Great Britain

France

Italy

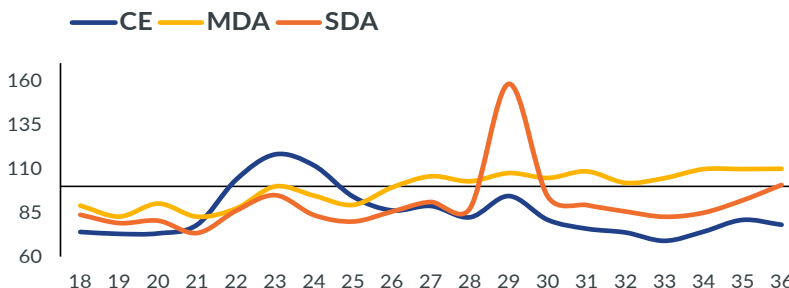
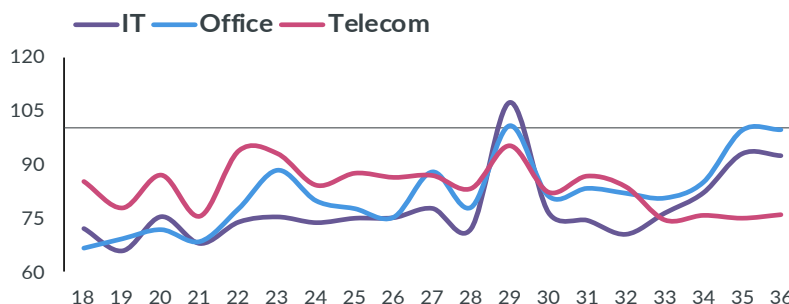
Spain

Japan

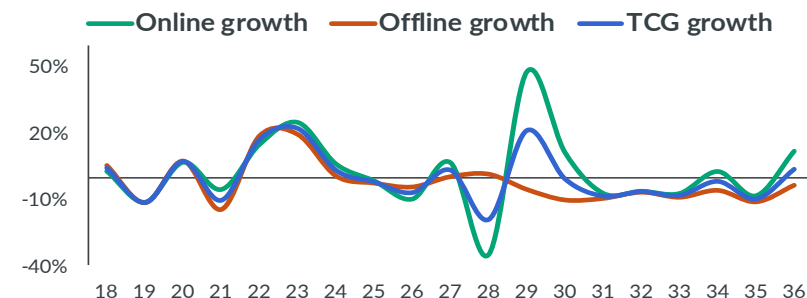
Brazil

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 36 (Sep 02 – Sep 08)

- Online sales at +12% lifted the total TCG market to a plus of 4%. Traditional retail at -3% did not negate the total result.
- Only desk computing posted a negative trend in IT/office products, at -10%. All others delivered growth with inkjet printers in the lead at +9%. Smartphones experienced an uptick of 1%.
- Most SDA categories witnessed double-digit gains with food preparation in front at +51%. Dental care and hot beverage makers lagged, at +9% and +7%. Cooling and washing machines were weak at +5% and -1%. TVs were up 3%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 36 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

Germany

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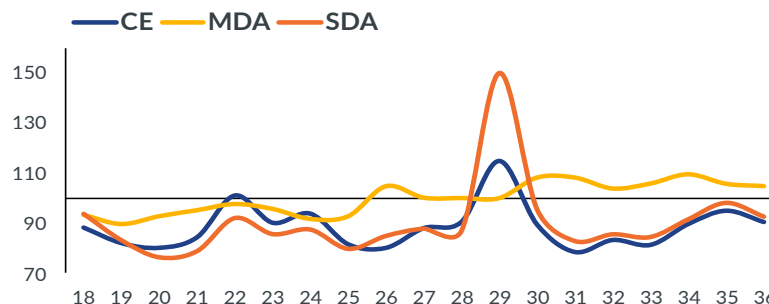
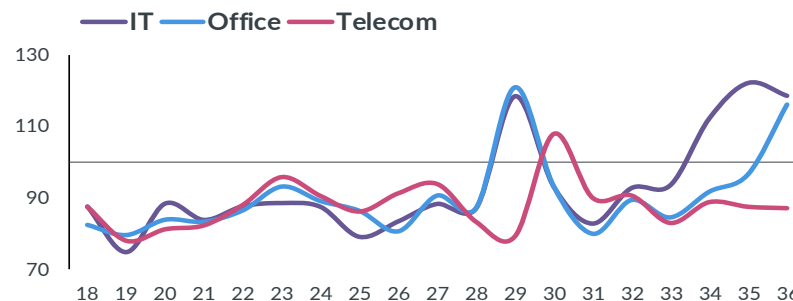
Spain

Japan

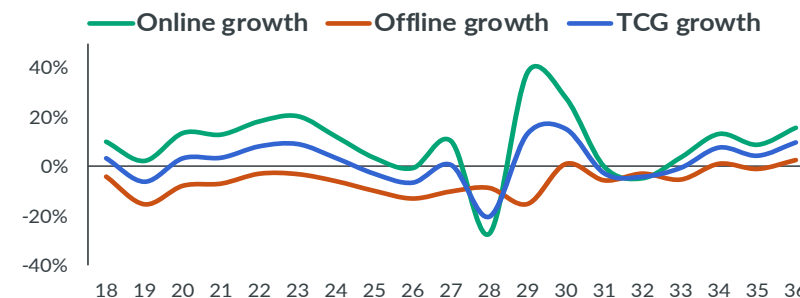
Brazil

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 36 (Sep 02 – Sep 08)

- A good result of +16% for online sales lifted the total TCG market by 10%. Traditional retail at +2% added to it.
- Except for media tablets at -5%, office products delivered double-digit growth with mice at +45% and desk computing claiming second place at +28%. Smartphones won 13%.
- CE products posted strong results too with audio home systems at +29% and TVs at +8%. SDAs ranged from +3% for shavers to +18% for hot beverage makers. Cooling and washing machines lagged at -3% and -2% respectively.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 36 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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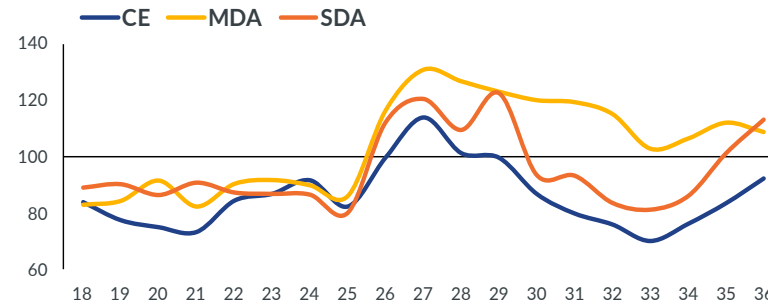
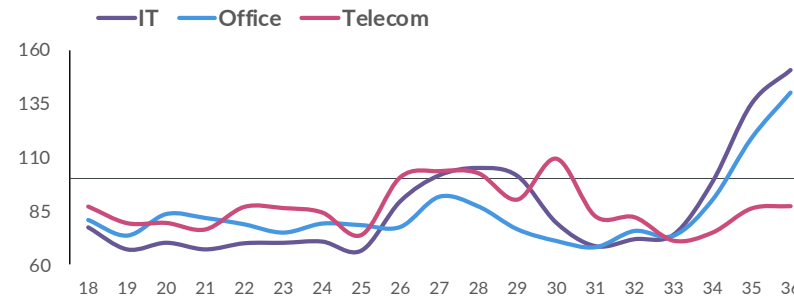
Spain

Japan

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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 36 (Sep 02 – Sep 08)

- Close trends for online sales (+2%) and traditional retail (+3%) led to an increase of 3% for the total TCG market.
- IT/office products were positive throughout with keyboards and media tablets in the lead at +20% and +19%. Desk computing was flat. Smartphones saw a tiny uptick of 1%.
- Except for headsets at +4%, CEs suffered, with soundbars posting the highest decrease at -24%. In SDA, air treatment at -57% was the worst-performing category while dental care could be found at the other end of the scale, at +37%.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 36 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

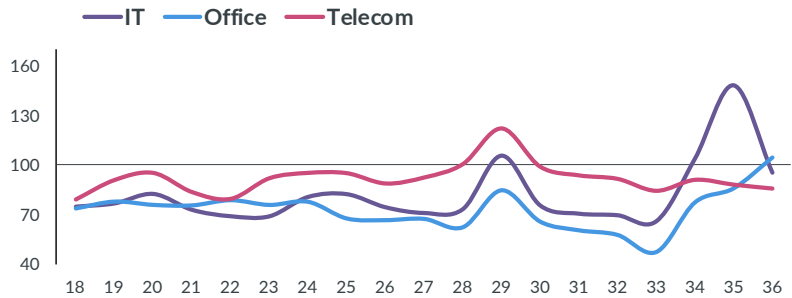


# Weekly retail insights from the Point of Sale

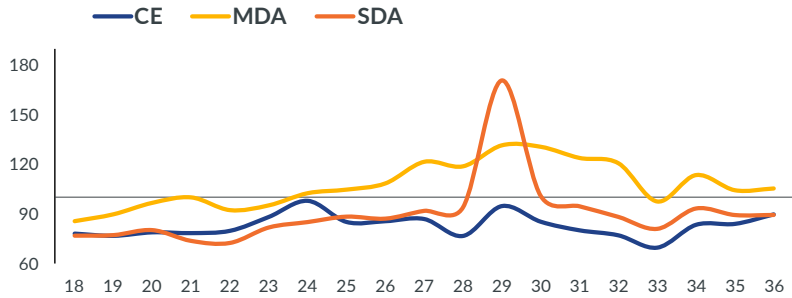
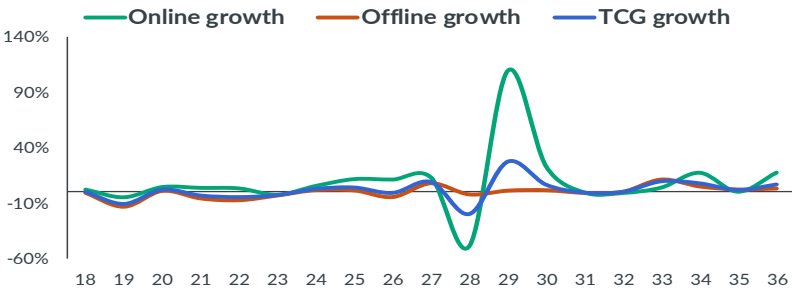
## Spotlight on Italy

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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 36 (Sep 02 – Sep 08)

- Online sales at +18% lifted the total TCG market to a plus of 7%. Traditional retail at +3% added to it.
- IT/office products delivered a mixed picture with media tablets out in front at +22%, flat desk computing, and -1% for inkjet printers. Smartphones posted +6%.
- Within the mixed scenario for MDA/SDA, air treatment posted the highest uplift at +43%. Dental care claimed second place at +27%. Food preparation suffered at -38%. Washing machines were flat. While PTV won 10%, audio home systems and soundbars posted negative trends.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 36 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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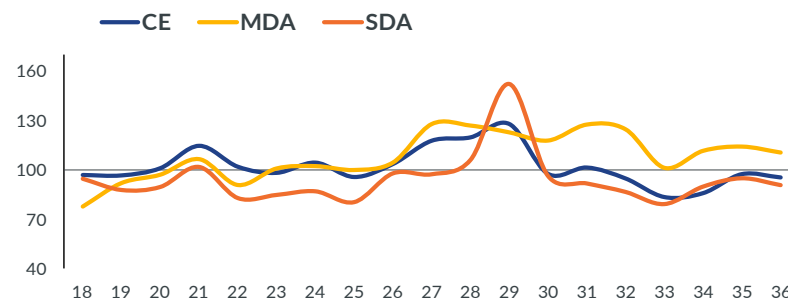
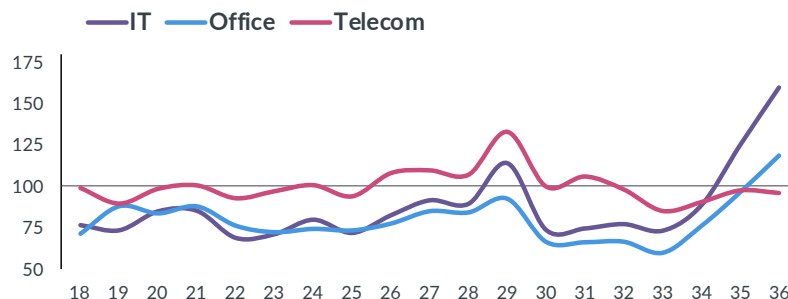
**Spain**

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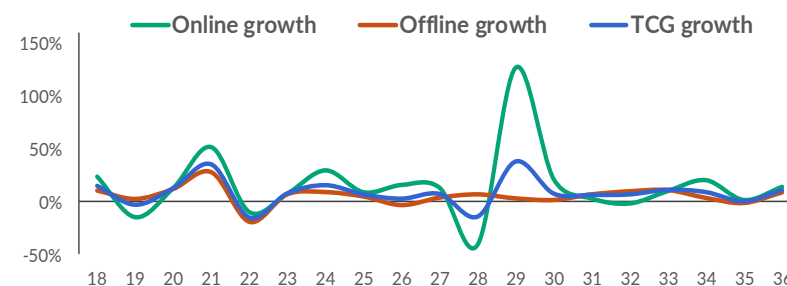
Brazil

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 36 (Sep 02 – Sep 08)

- Good results for online sales (+15%) and traditional retail (+10%) scored an average of +11% for the total TCG market.
- The positive picture for IT/office categories saw media tablets and desk computing in the lead at +12%. Mobile computing experienced the smallest increase at +1%. Smartphones posted good growth at +23%.
- While audio home systems decelerated at -15%, soundbars gained 16% and PTV were up 13%. MDAs/SDAs ranged between +17% for cooling to +4% for vacuum cleaners.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 36 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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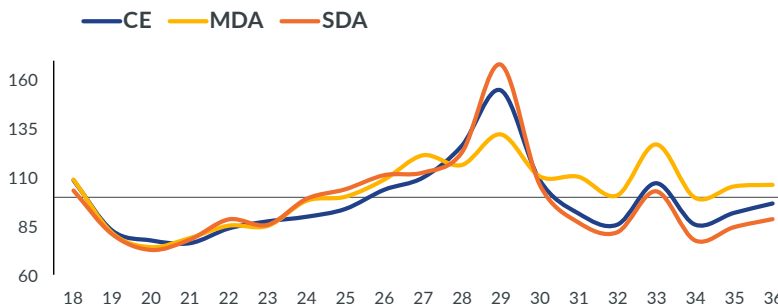
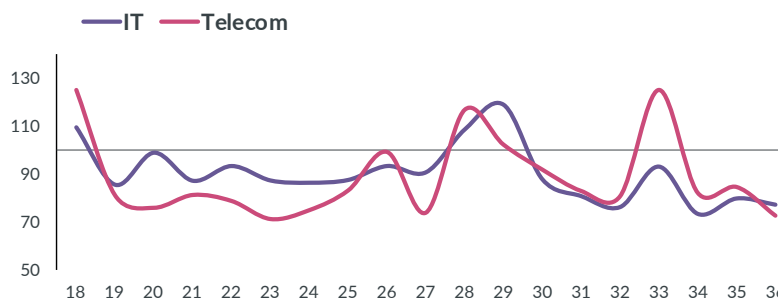
Spain

**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 36 (Sep 02 – Sep 08)

- Online sales delivered a plus of 14%, leading to +4% for the total TCG market. Online sales at +2% added to it.
- Week 36 saw +16% for media tablets and -3% for mobile computing. Smartphones accelerated at +9%.
- CE categories were weak with just +3% for audio home systems and PTV and soundbars at -12%. Except for cooling at -1%, all other MDA/SDA categories delivered growth. Food preparation and hot beverage makers led at +23% and +22% respectively.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 36 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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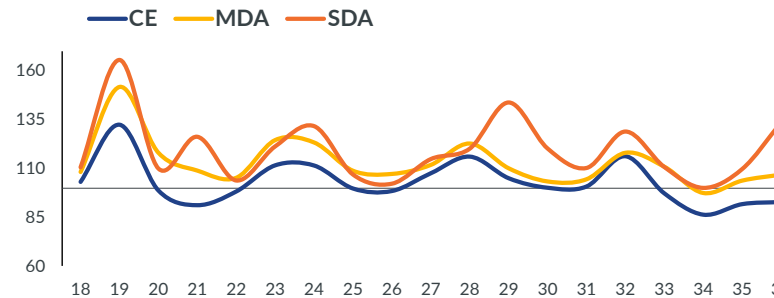
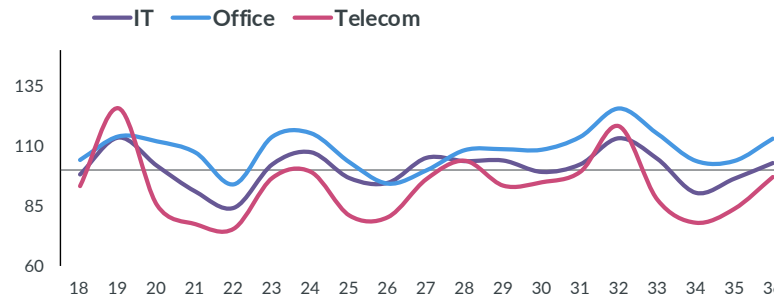
Spain

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 36 (Sep 02 – Sep 08)

- Acceleration of online sales of +20% led to +8% for the total TCG market. Traditional retail at -4% was not able to cloud the result.
- Most IT/office products posted double-digit growth rates with laser printers in the lead at +43%. Mobile computing delivered +8%. Smartphones were up 7%.
- Except for PTV at -6% and hot beverage makers at +4%, there was double-digit growth for all other MDA/SDA/CE categories. Vacuum cleaners took the lead at +88% and food preparation claimed second place at +14%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 36 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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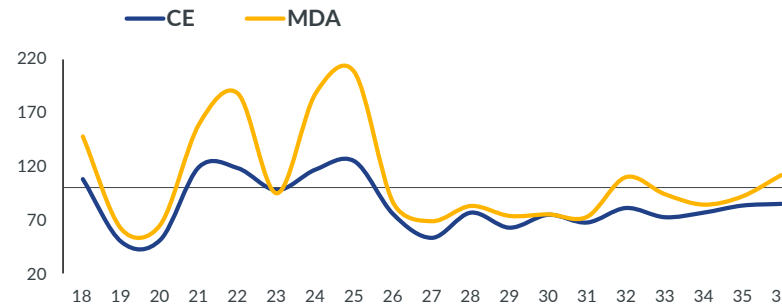
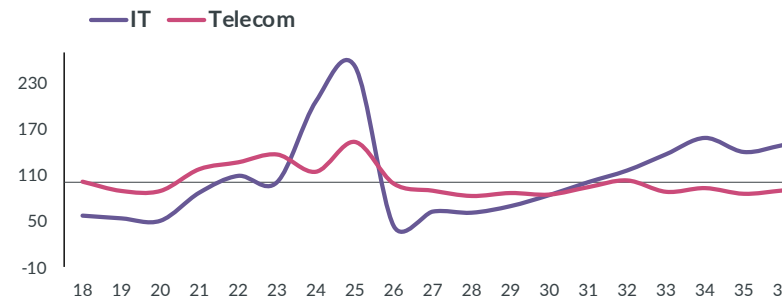
Spain

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 36 (Sep 02 – Sep 08)

- Flat online sales and flat traditional retail naturally led to an overall flat TCG market.
- Smartphones were weak in week 36 and experienced a decline of 1%. Mobile computing delivered a plus of 12%.
- PTV was the weakest of all categories, losing 15%. Washing machines declined by 2% and cooling was flat.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 36 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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