

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 233

Week 48 of 2024

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Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China



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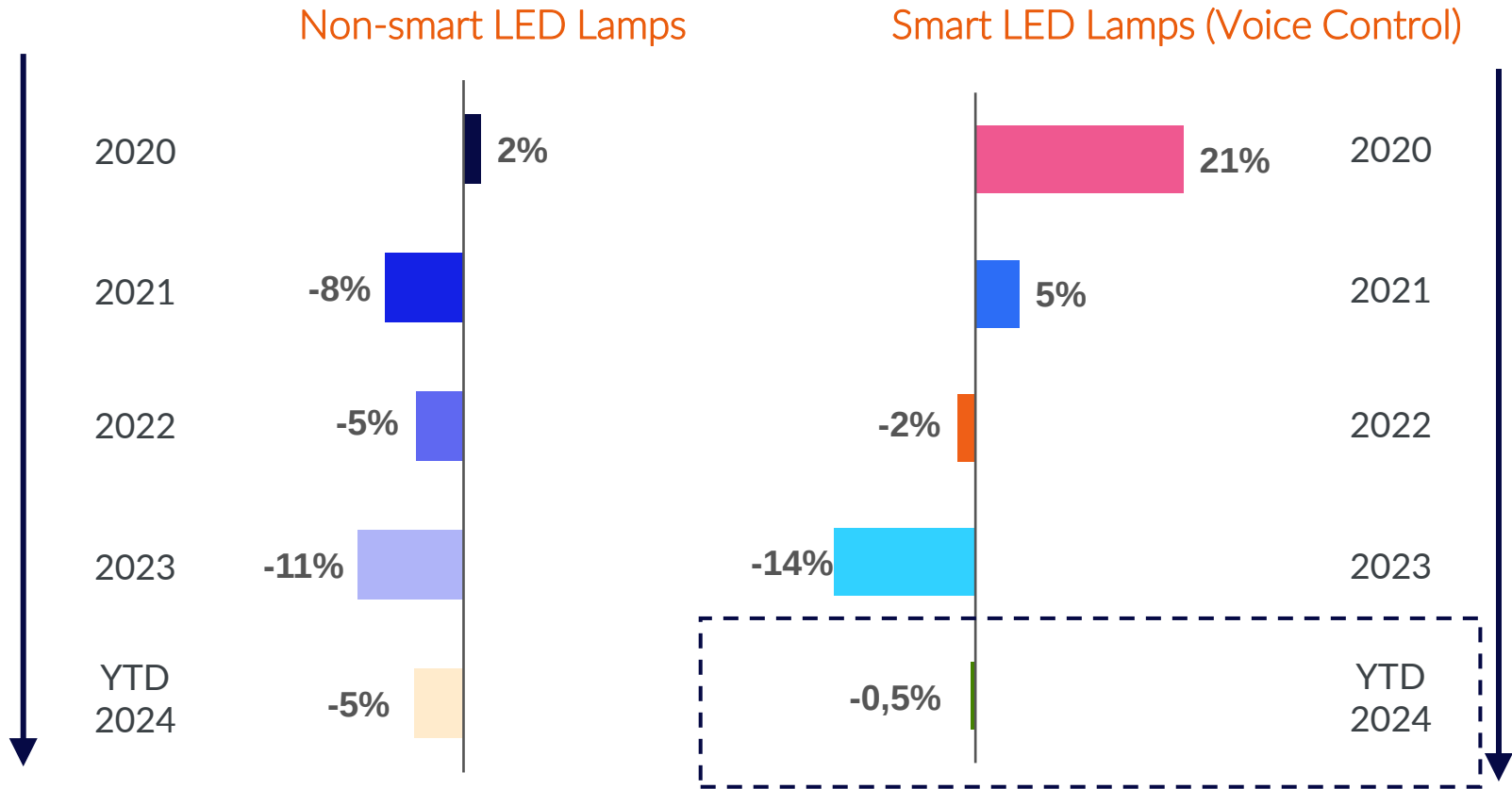
Fact of the Week

Smart LED Lamps experiencing a turnaround in Q1 2024 following a sharp decline in 2023

Total LED lamps decline is accelerating since 2021. After previously outgrowing the rest of the category, smart LED decline accelerates in 2023, driving decline of total LED Lamps in the first months of 2024

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LED Lamps | Sales Value EUR (adj.) Growth Rate PY | YTD 2024: January – April



Source: GfK Market Intelligence: Sales Tracking. Sector: LED Lamps. Feature: Smart, international Panelmarket. EUR Value (adj.) & growth. Comparable PGs per country. YTD Jan – Apr 2024.

Weekly retail insights from the Point of Sale

Spotlight on Germany

About **gfknewron**

Fact of the week

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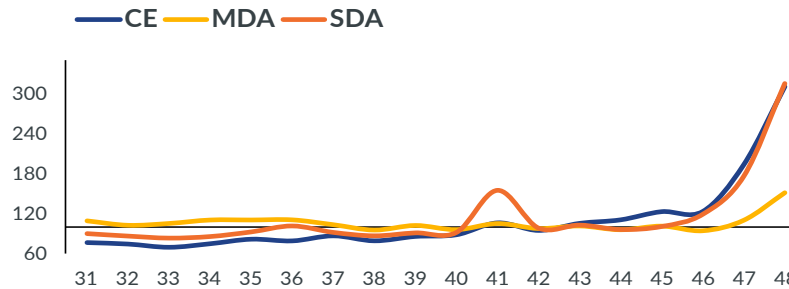
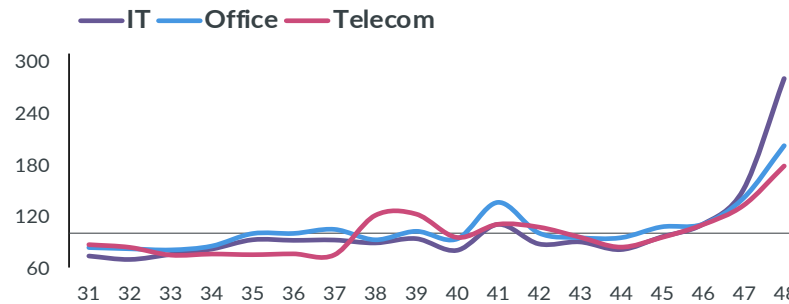
Spain

Japan

Brazil

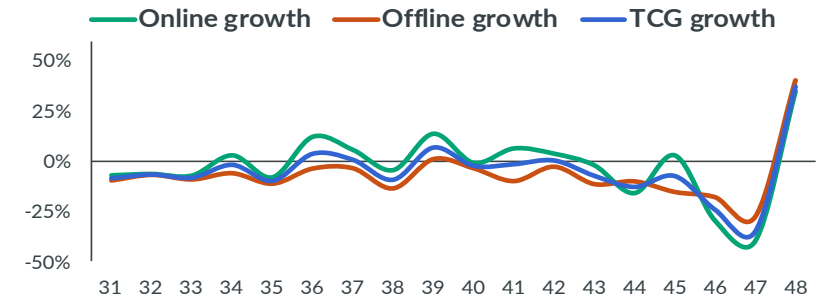
China

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 %



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- The shift of Black Friday by one week led to strong increases this week YoY. Online sales (+35%) and traditional retail (+40%) boosted the total TCG market by 37%.
- IT/office product groups posted more than +30% with mobile computing in the lead at +76%. Smartphones were a little weaker, delivering +14%.
- In SDA, food preparation was the leading category at +107%. Air treatment lagged at +5%. While washing machines delivered a good +20%, cooling posted +5%. CEs were strong at +65% for soundbars and +62% for PTV.

SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 48 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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Italy

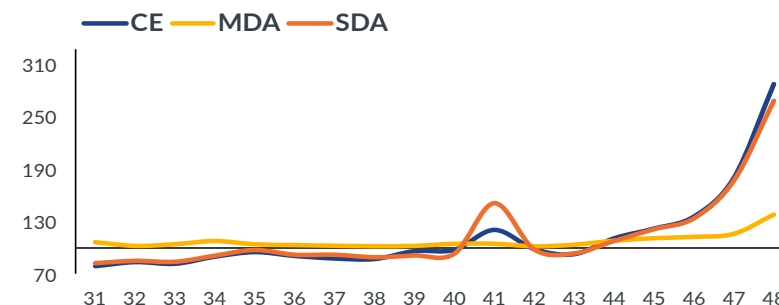
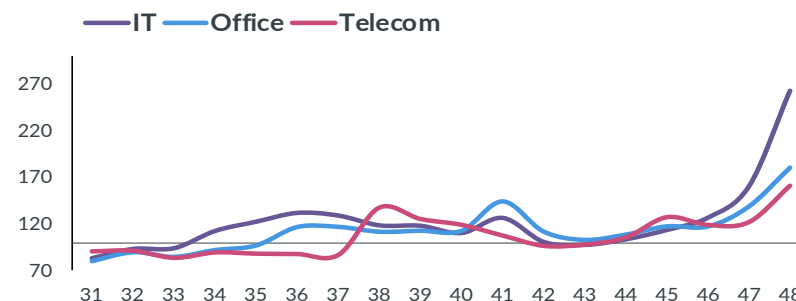
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Japan

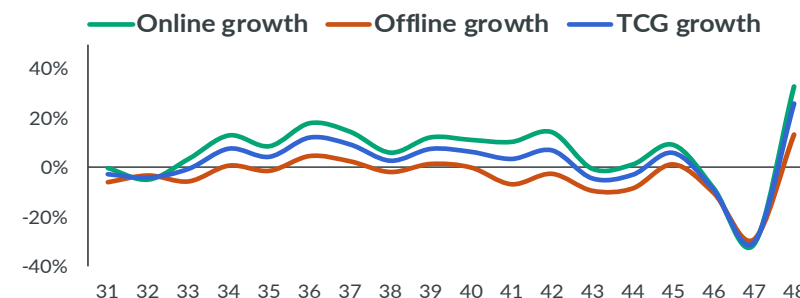
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- Rates of +33% for online sales and +13% for traditional retail raised the total TCG market by 26%.
- Except for laser printers at -28%, all other IT/office products increased by high double digits with keyboards the weakest category at +18%. Smartphones lagged at +5%.
- Scores for SDA categories ranged from +39% for dental care to +65% for food preparation. Cooling delivered +32% and washing machines were up 19%. PTV at +35% was the weakest product group within CE.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 48 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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Fact of the week

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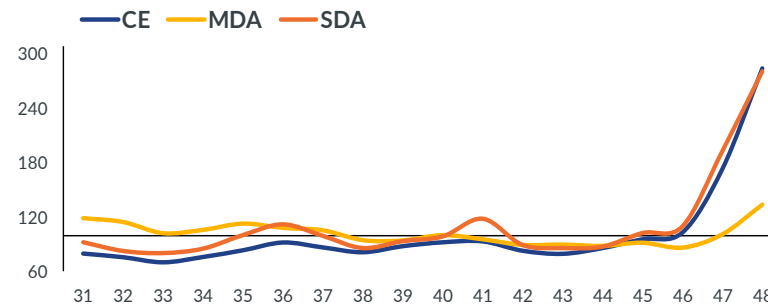
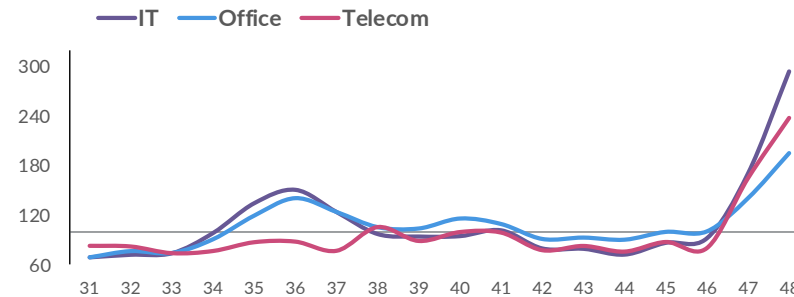
Spain

Japan

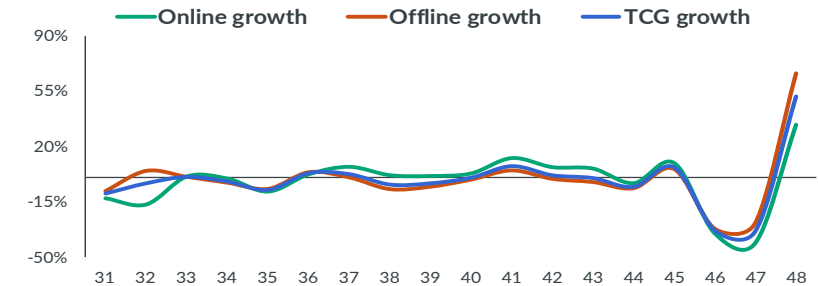
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- Black Friday did not only push online sales (+33%) but traditional retail too (+66%) which led to a plus of 52% for the total TCG market.
- While mice and keyboards grew 20% and 21%, all other IT/office categories won more than 40%. Media tablets even posted +97%. Smartphones delivered good growth of 56%.
- Audio home systems at +9% were the weakest category within CE products. Air treatment delivered +10% and cooling +11% but all other MDAs/SDAs grew in high double digits.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 48 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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Fact of the week

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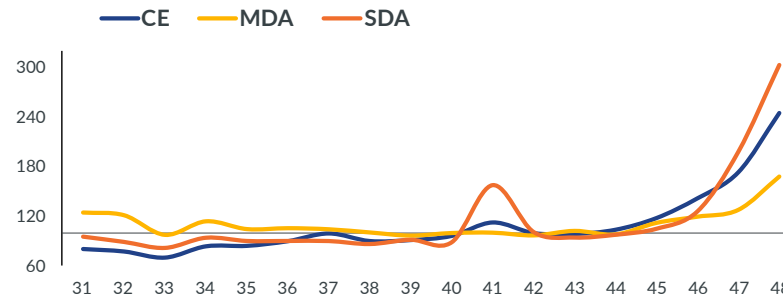
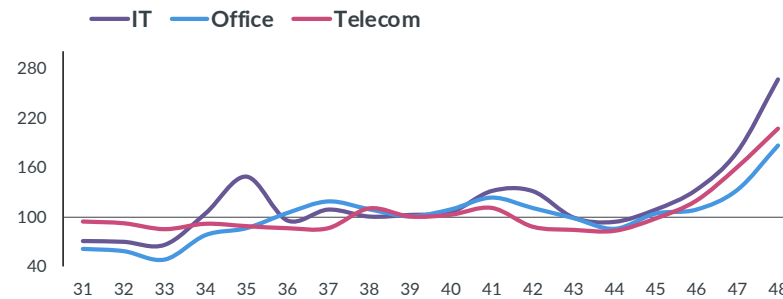
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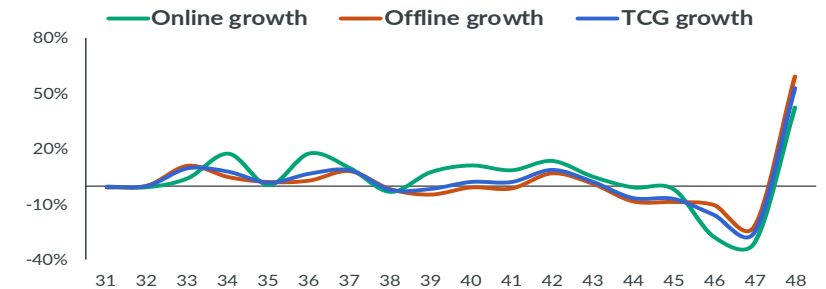
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- Traditional retail at +60% lifted the total TCG market by 53%. Online sales at +43% added to it.
- Growth within IT/office products was led by mobile computing at +80%. Smartphones accelerated at +46%.
- Within SDA, dental care was outstanding at +118%. Food preparation claimed second place at +94% and vacuum cleaners came in third at +93%. CE categories delivered good results too, with PTV at +40%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 48 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, 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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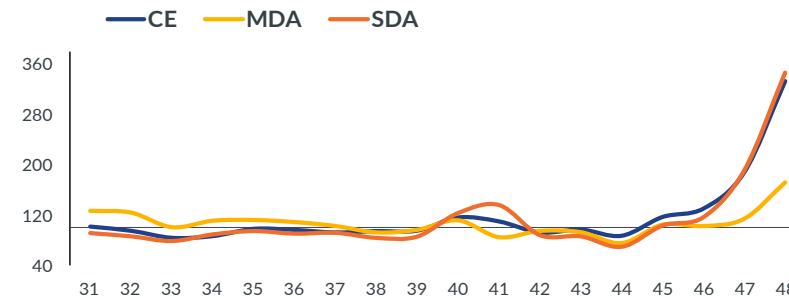
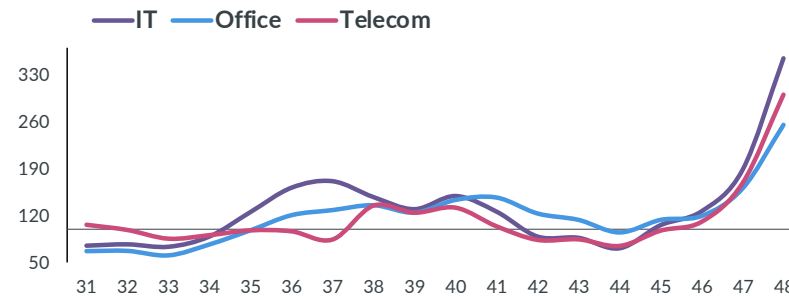
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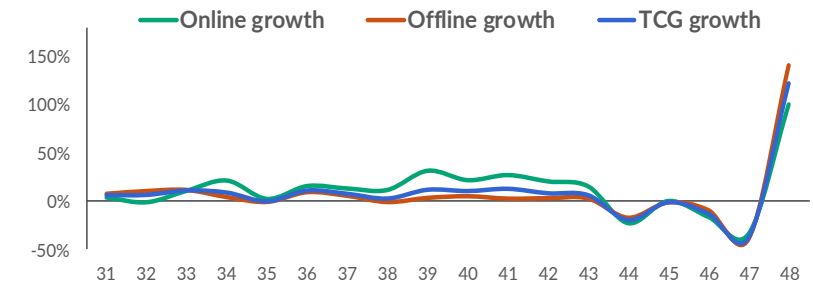
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- In Spain, we saw triple-digit development with online sales at +101% and traditional retail at +142% which led to +122% for the total TCG market.
- While laser printers posted +86%, media tablets gained +176%. Smartphones accelerated at +151%.
- MDAs claimed last place with cooling and washing machines increasing +53%. SDAs performed better, led by vacuum cleaners at +140%. Audio home systems were the weakest CE category, posting +61%. PTVs accelerated at +115%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 48 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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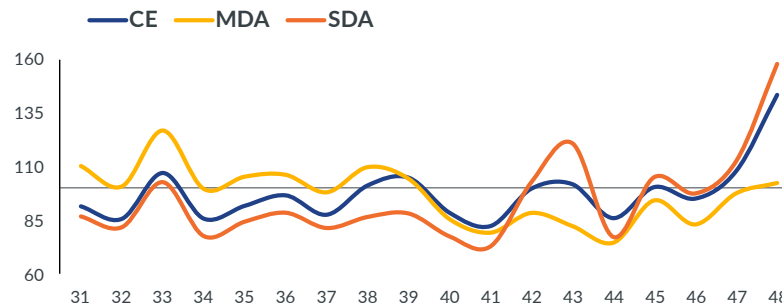
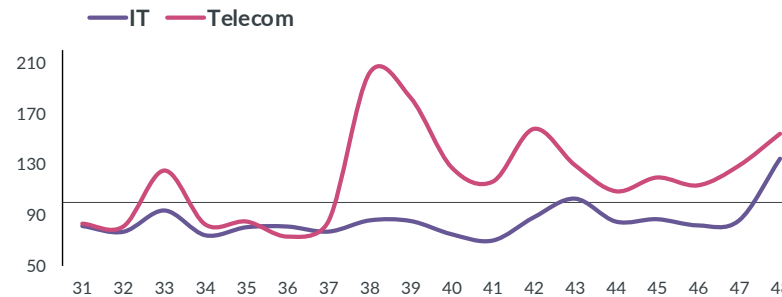
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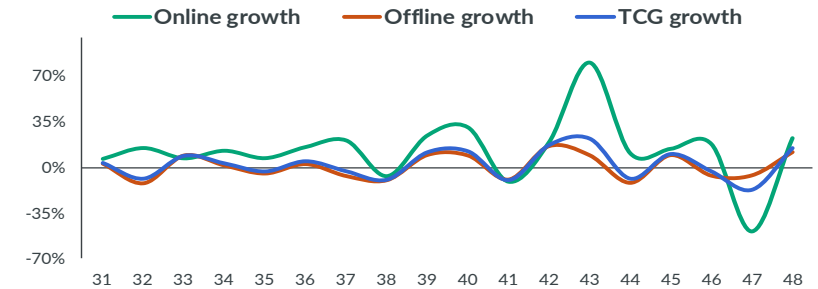
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- Both traditional retail at +12% and online sales at +22% lifted the total TCG market by 15%.
- Media tablets experienced a plus of 53% and mobile computing gained 12%. Smartphones were up 37%.
- While vacuum cleaners and dental care declined by 5%, hot beverage makers were nearly flat at -1%. All other SDA and MDA categories posted moderate growth. CE categories delivered a mixed picture with scores ranging from +33% for soundbars to -20% for audio home systems. PTVs rose 1%.

SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 48 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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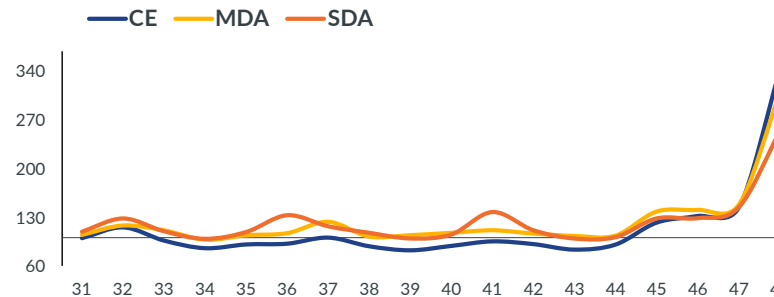
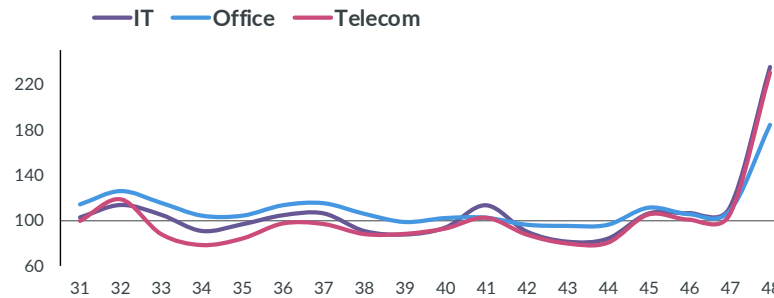
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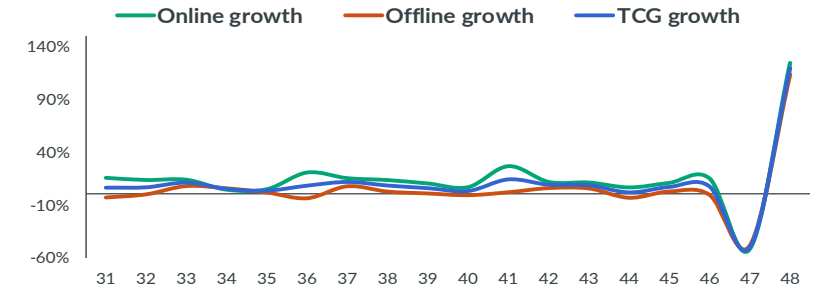
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- Strong acceleration of both online sales at +125% and traditional retail at +113% brought a plus of 120% to the total TCG market.
- In week 48, laser printers saw good growth of 41% but the other IT/office categories were even stronger, with mobile computing in the lead at +96%. Smartphones won by 103%.
- Shavers reported +79%, hot beverage makers +83%, and food preparation was at +89%. The other CE and MDAs/SDAs had triple digit scores. PTV gained 144%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 48 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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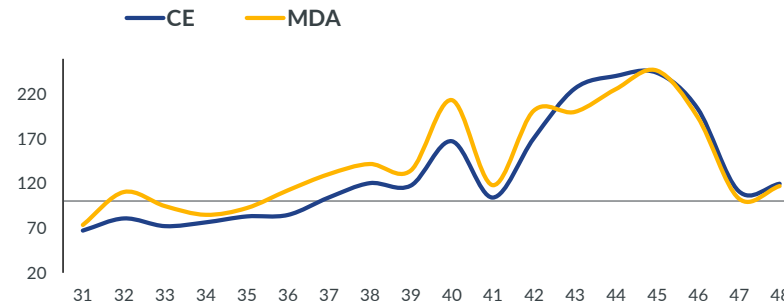
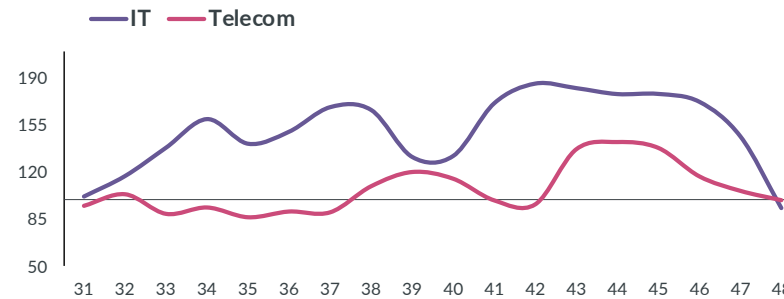
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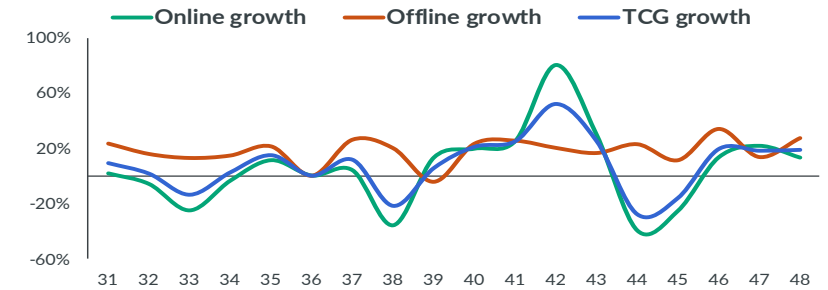
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



BF: 2023 in week 47 vs 2024 in week 48

Key take aways in calendar week 48 (Nov 25– Oct 01)

- Week 48 saw good growth for traditional retail (+27%) and online sales (+13%), lifting the total TCG market to +19%.
- Due to their high share in the product group basket, smartphones at just +4% impacted the total result. Mobile computing delivered an increase of 43%.
- There were good results for cooling (+79%), washing machines (+89%), and PTV (+63%). This was boosted by the trade-in program supported by the central government for replacing existing items with energy-efficient models.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 48 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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