State of consumer technology and durables sales tracker

Weekly trends and insights for the tech and durables market

Edition 196
Week 10 of 2024
Powered by **gfknewron**

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Fact of the Week

Promising dynamic for MDA market in Q4 2023

A sign of stabilization in times of low willingness to spend and elevated market saturation

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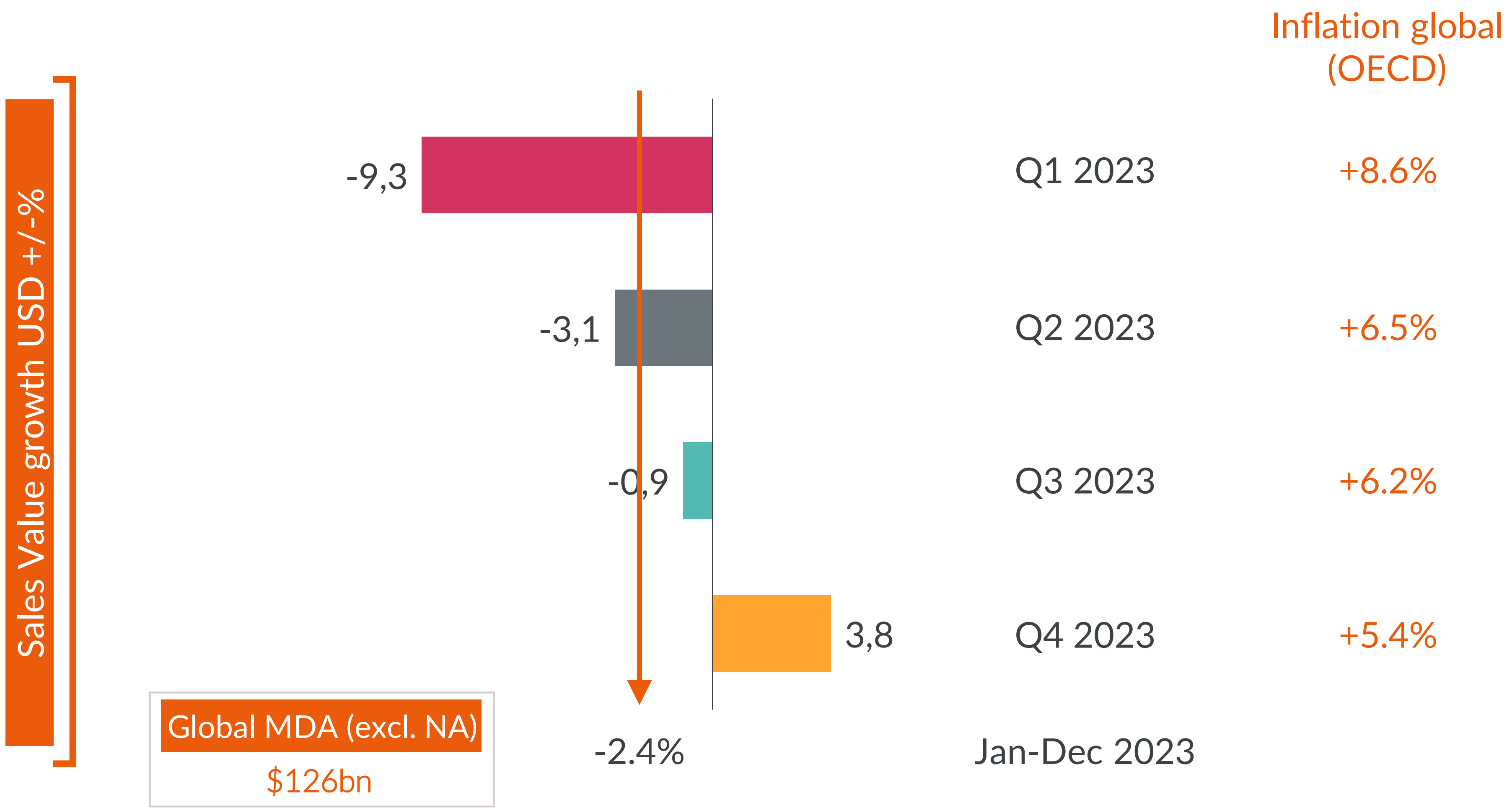
MDA9 | Period: January 2023 – Dec 2023 | Value growth USD +/-%



Source: GfK Market Intelligence: Sales Tracking, International Coverage (excl. North America)

Weekly retail insights from the Point of Sale

Spotlight on Germany

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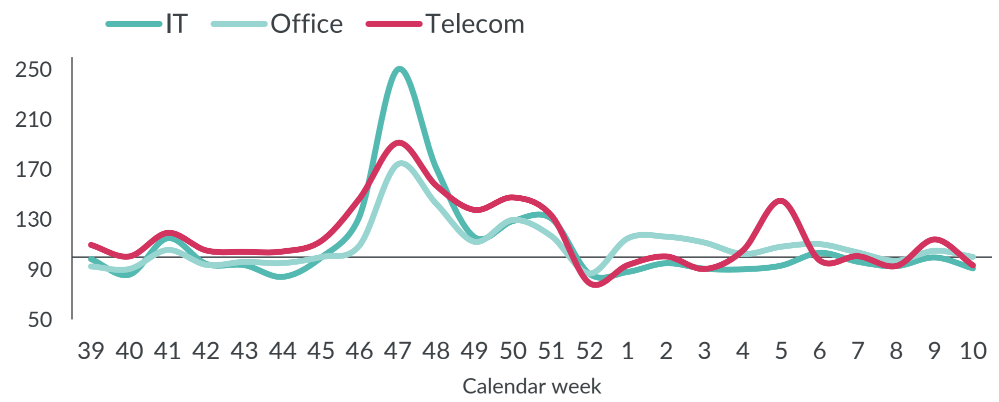
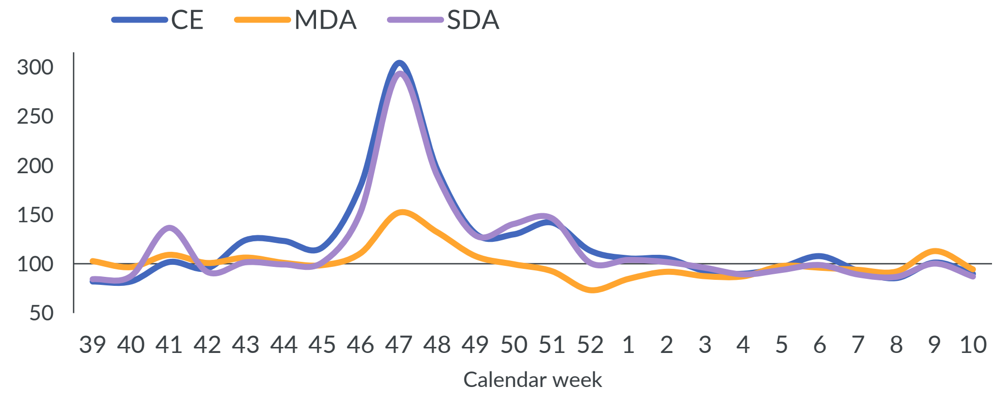
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

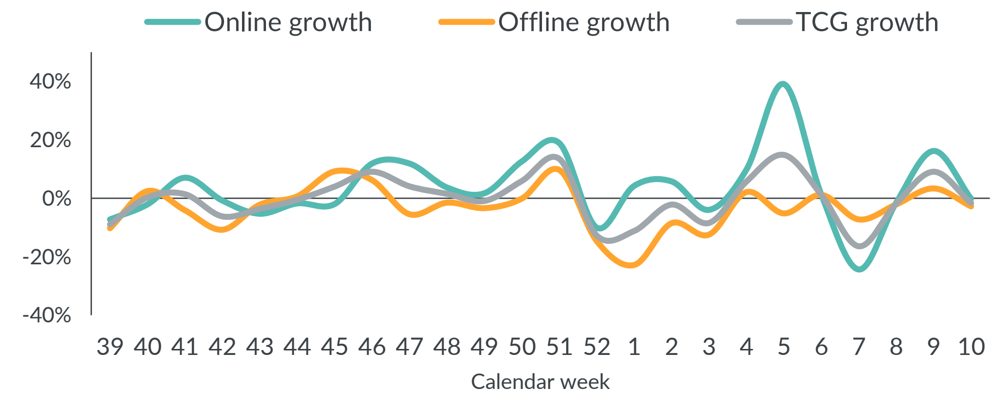
Index: 2023 average weekly turnover in EUR = 100





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 10 (Mar 04 – Mar 10)

- Traditional retail dropped by 3%. Combined with flat online sales this led to a small decrease of 2% for the total TCG market.
- Except for monitors at +2%, all other IT/Office products delivered negative trends, ranging between -4% for laser printers to -15% for inkjet printers. Smartphones experienced a value increase of 3%.
- CE categories were negative throughout, with TVs and soundbars posting -14%. In week 10, MDAs/SDAs delivered a mixed picture, ranging from +12% for shavers to -19% for air treatment.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 10 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.

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Spotlight on Great Britain

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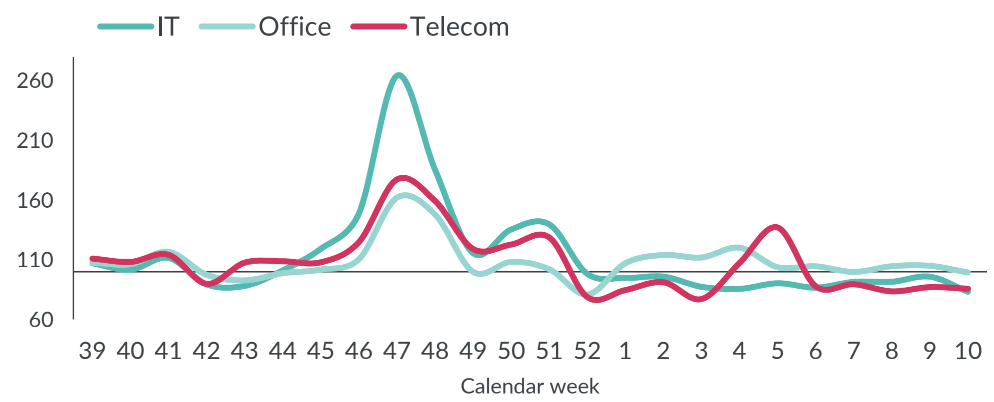
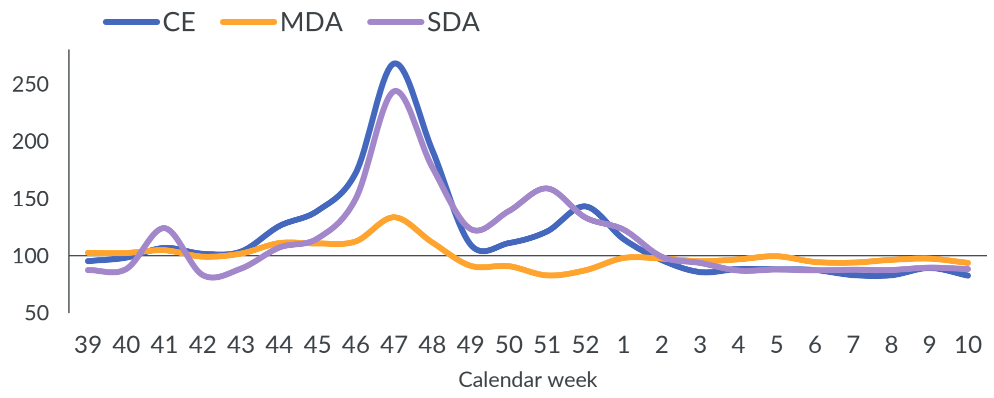
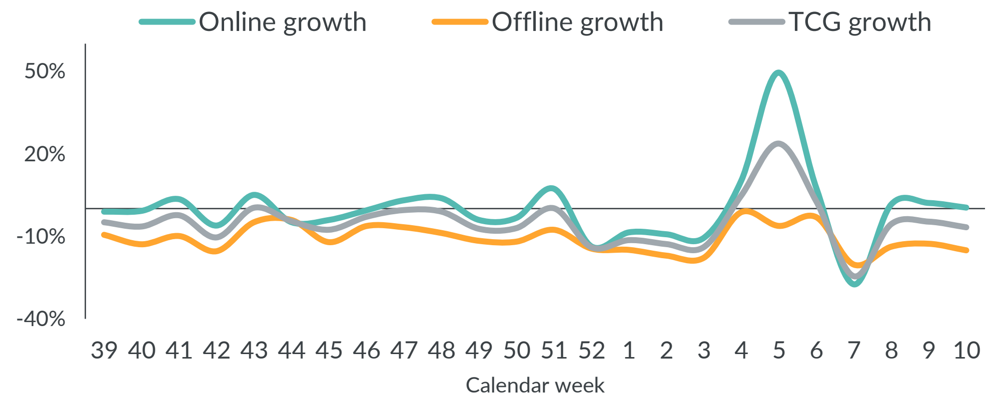
Index: 2023 average weekly turnover in EUR = 100





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



Key take aways in calendar week 10 (Mar 04 – Mar 10)

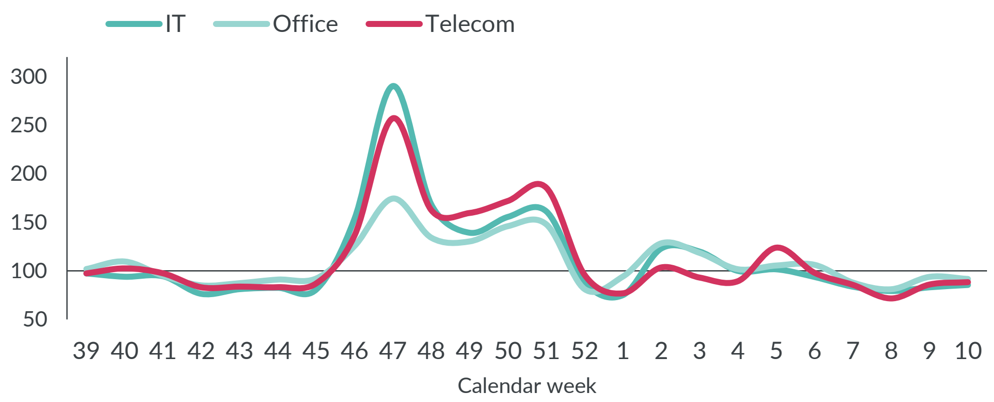
- Deceleration of traditional retail (-15%) dragged the total TCG market down by -7%. Flat online sales were unable to compensate.
- IT/Office products were led by peripherals. Keyboards grew at +17% and mice at +21%. Media tablets and laser printers marked the other end of the scale, at -20%. Smartphones decelerated at -11%.
- Shavers (+11%) and food preparation (+14%) were the best-performing categories within MDA and SDA. All others grew or declined moderately. Soundbars experienced a strong drop of 24%.

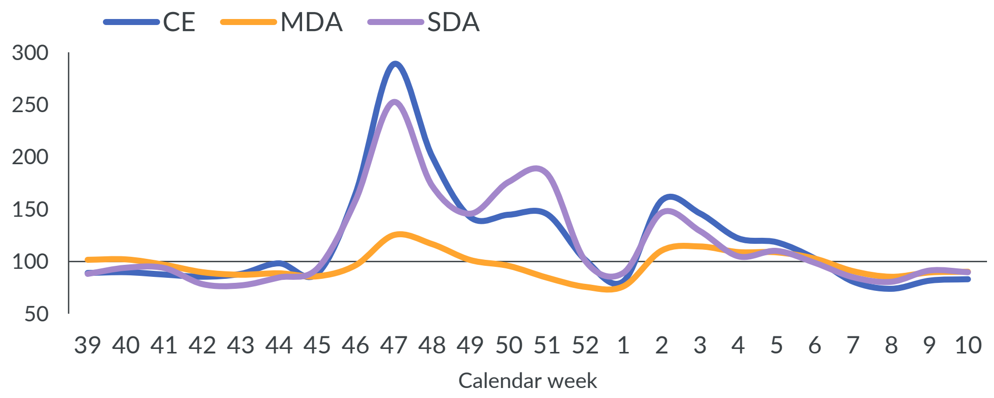
Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 10 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet 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

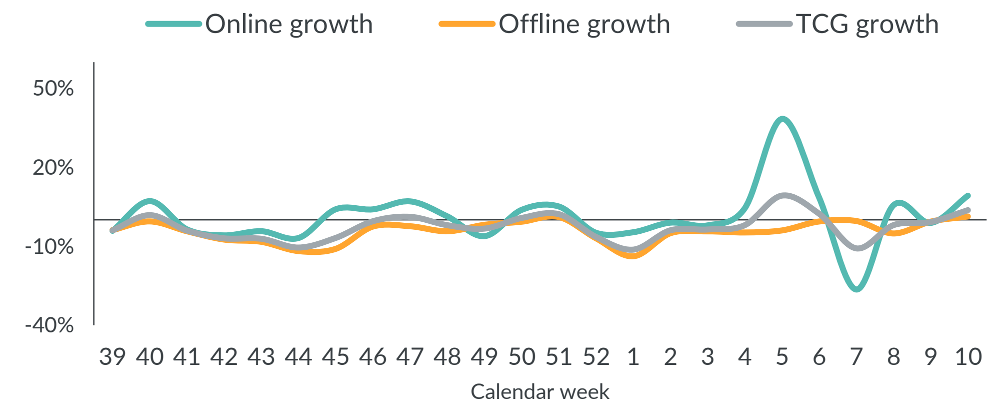
Spotlight on France

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 10 (Mar 04 – Mar 10)

- Online sales at +9% lifted the total TCG market by 4%. Traditional retail added to it with a slight increase of 1%.
- Printers brought up the rear in week 10, at -19% for laser and -11% for inkjet. IT products ranged between -7% for desk computing and +13% for monitors and mice. Smartphones posted a plus of 7%.
- In week 10, vacuum cleaners stood out in MDA/SDA products, at +12%. All others delivered slight ups and downs below 10%. While audio home systems decreased by 8%, TVs and soundbars were flat.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 10 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

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Spotlight on Italy

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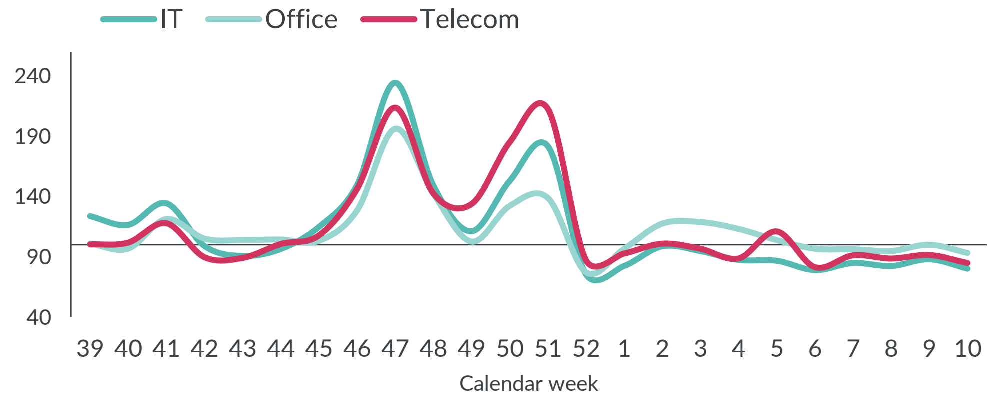
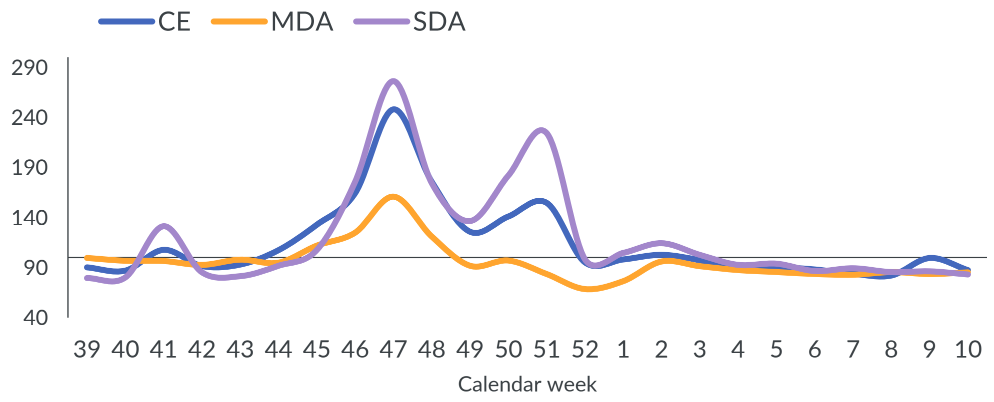
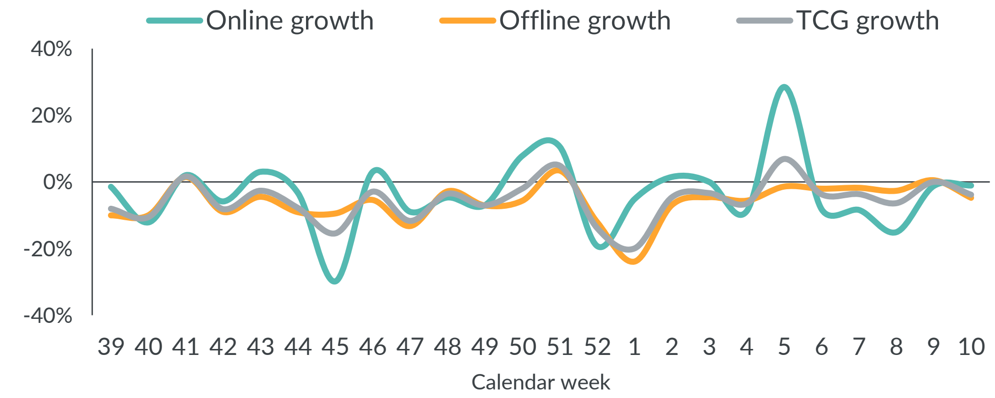
Index: 2023 average weekly turnover in EUR = 100





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



Key take aways in calendar week 10 (Mar 04 – Mar 10)

- Deceleration of traditional retail (-5%) dragged the total TCG market down by -4%. Online sales added to it by delivering -1%.
- All IT/Office and telecom products experienced solid negative trends, ranging from -10% for desk computing to -13% for inkjet printers and mobile computing. Smartphones were stable at +0.5%.
- In week 10, air treatment took the lead at +44%. The other MDA and SDA categories ranged from +12% for hot beverage makers to -8% for cooling. Vacuum cleaners were flat. While audio home systems lost 13% and TVs were down 7%, soundbars experienced an uptick of 2%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 10 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

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Spotlight on Spain

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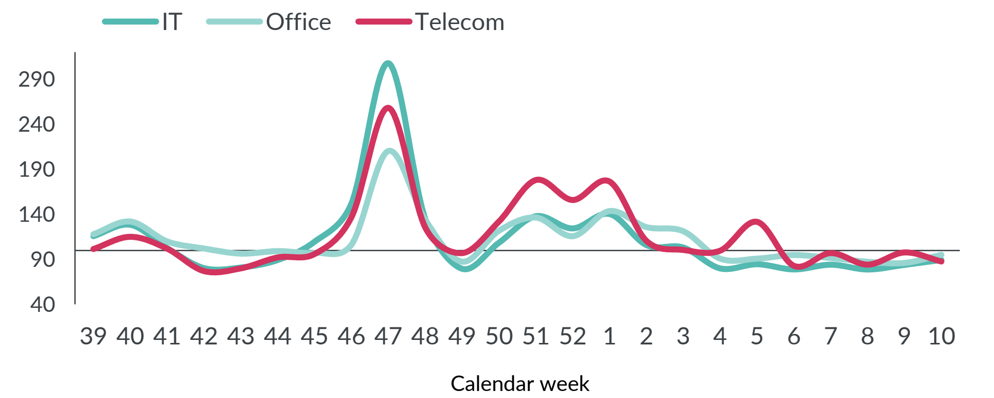
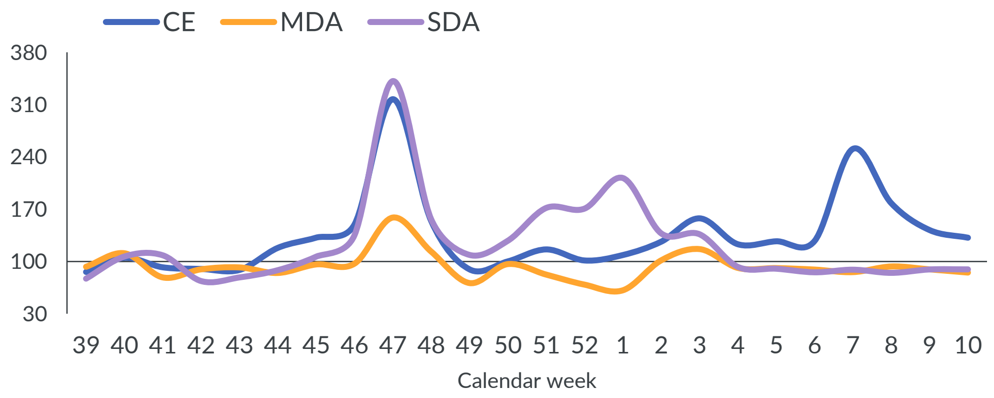
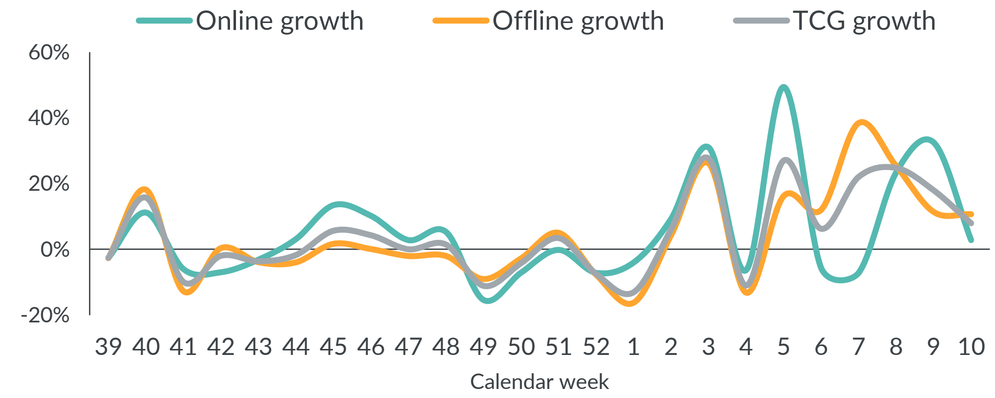
Index: 2023 average weekly turnover in EUR = 100





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



Key take aways in calendar week 10 (Mar 04 – Mar 10)

- While traditional retail showed a plus of 11% (same as in week 9), online sales lost its dynamics and posted a weak +3% compared to +33% in week 9, leading to +8% for the total TCG market (+18% the previous week).
- As in past weeks, PTV led the growth, at +50%, while audio home systems at -30% were the worst-performing product group. MDAs were down by 4% but SDAs posted growth, with hot beverage makers in the lead at +19%.
- Except for media tablets at +19%, all other IT/Office products posted negative trends, ranging from -5% for inkjet printers and desk computing to -13% for mobile computing. Smartphones lagged at -2%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 10 2024 (no comparability with 2019); 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, hot beverage makers; Value is in EUR NSP (non-subsidized price) fix

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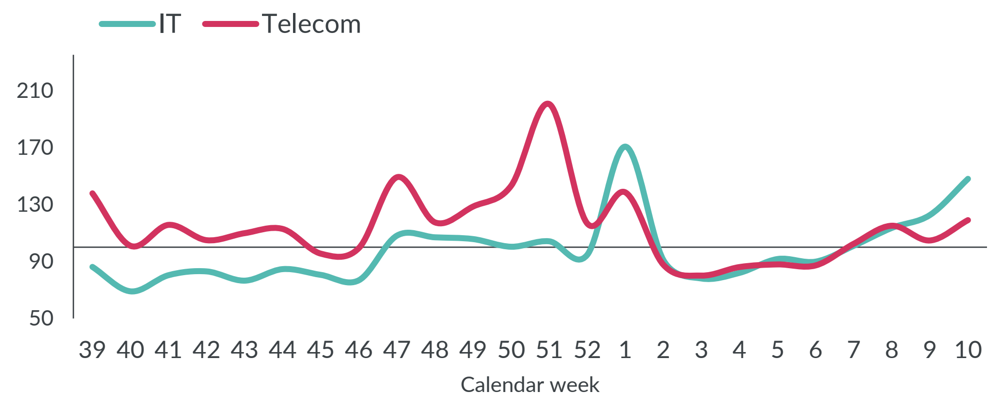
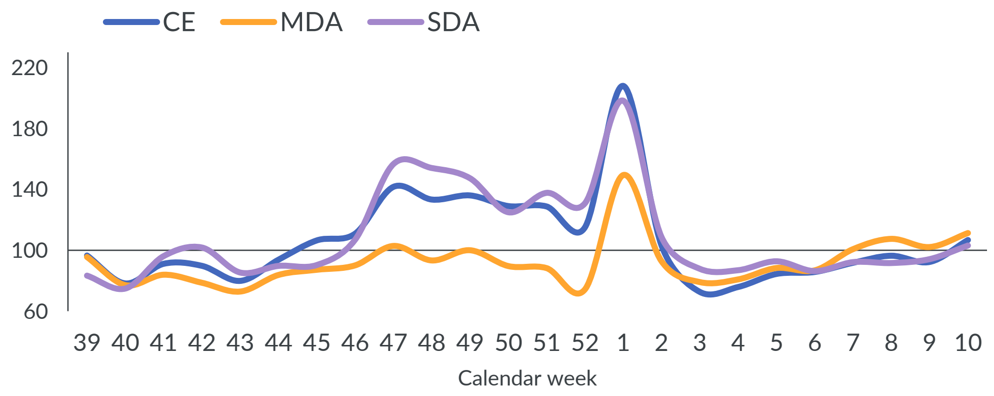
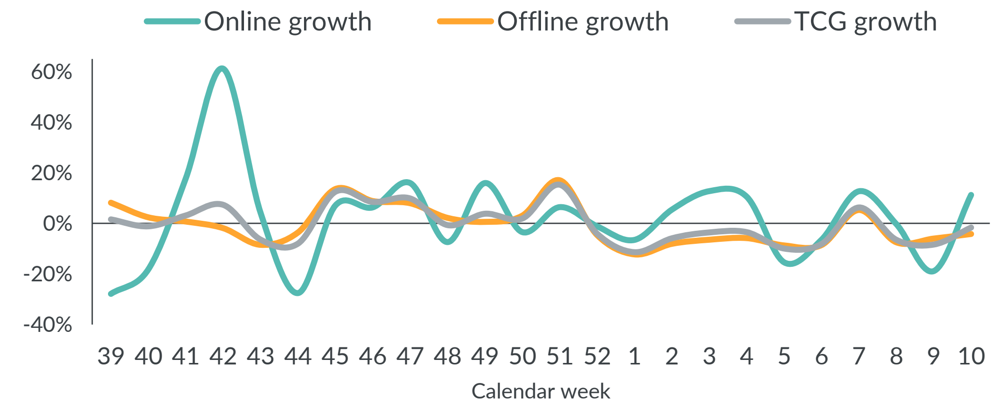
Index: 2023 average weekly turnover in EUR = 100





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



Key take aways in calendar week 10 (Mar 04 – Mar 10)

- Traditional retail at -4% dragged the total TCG down by 2%. Online sales – due to its small share – was not able to balance this out although the increase was 11% (up from -19% in week 9).
- While mobile computing increased by 2%, media tablets decelerated at -7%. Smartphones lagged at -5%. Headsets experienced a solid growth of 26%.
- Overall positive trends for SDA products saw hot beverage makers in the lead at +21% and vacuum cleaners last at +5%. The exception was air treatment at -18%. MDA posted -6%. In CE, soundbars declined by 10% while TVs gained 2%. Audio home systems were flat.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 10 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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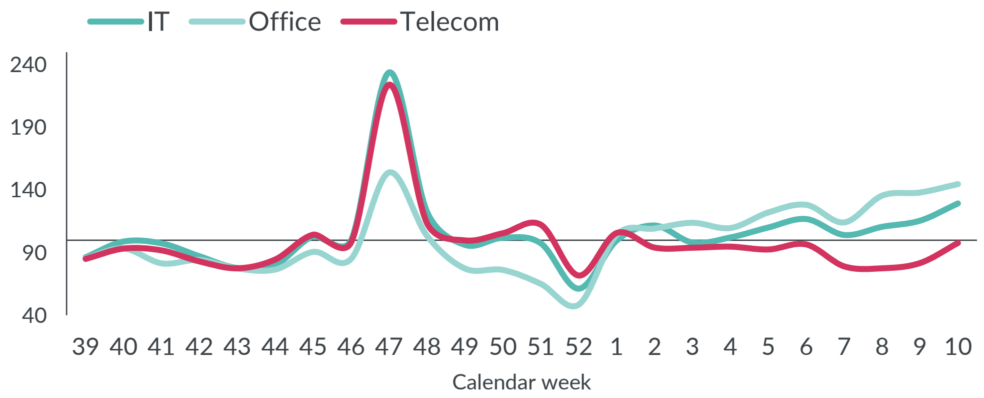
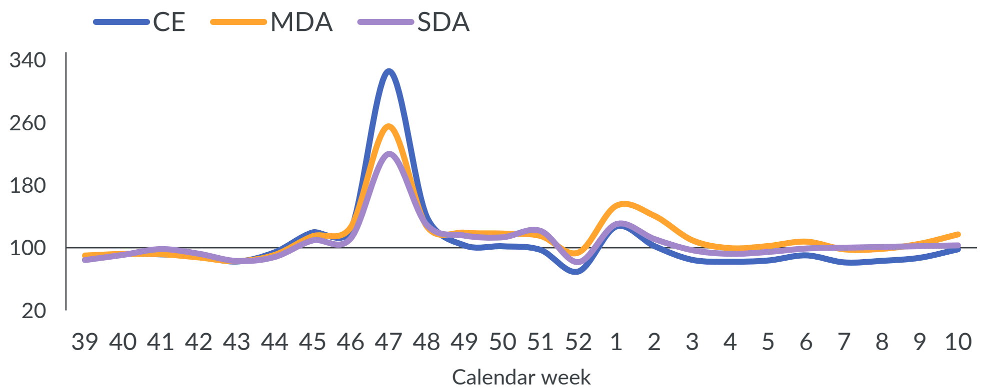
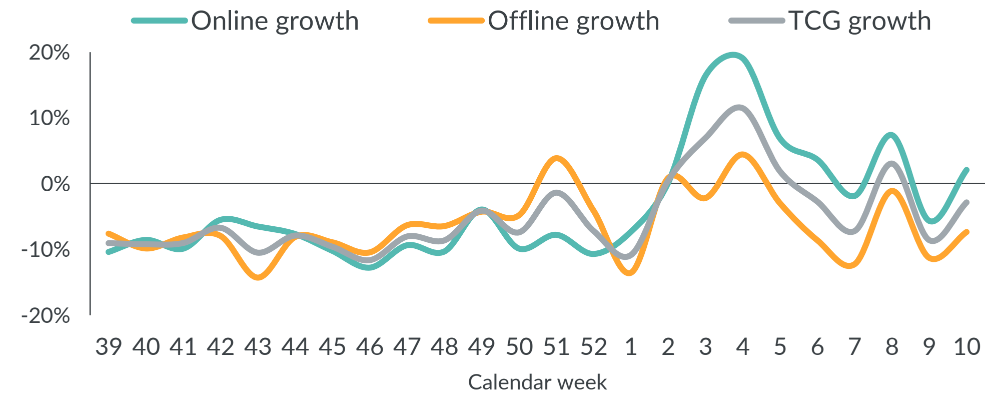
Index: 2023 average weekly turnover in EUR = 100





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



Key take aways in calendar week 10 (Mar 04 – Mar 10)

- Traditional retail delivered -7% which dragged the total TCG market down by 3%. Online sales at +2% was not able to compensate.
- Media tablets at +45% were the best-performing category in week 10. Only laser printers claimed growth as well. All other IT/Office categories posted negative trends, with laser printers at -6%. Smartphones slumped at -13%.
- Among MDA/SDA/CE products, only audio home systems (-11%) and TVs (-4%) delivered negative trends. At +21%, hot beverage makers took the lead. Cooling was next at +15%, followed by vacuum cleaners at +11%. Shavers were flat.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 10 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

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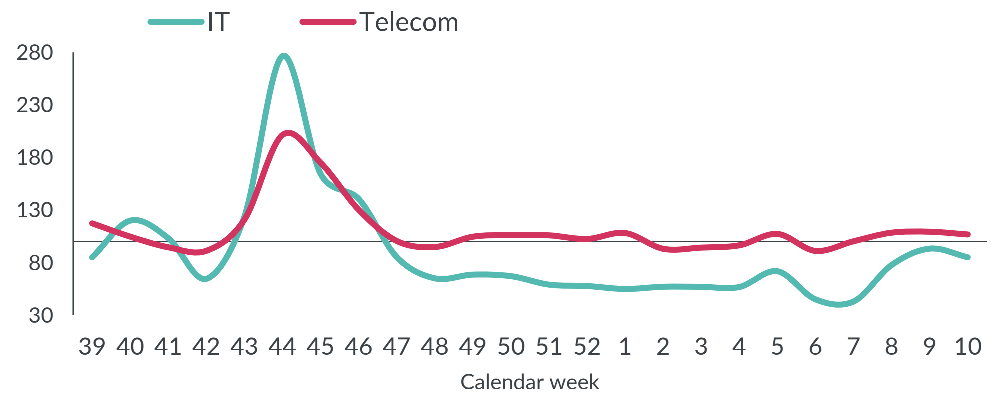
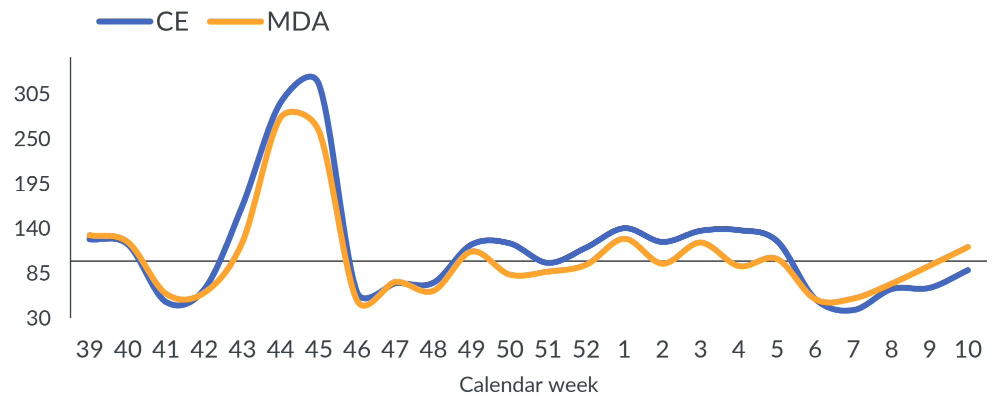
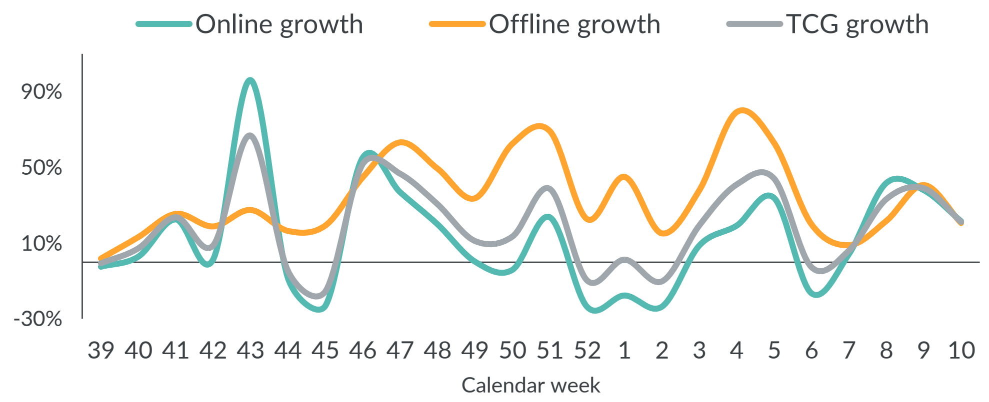
Index: 2023 average weekly turnover in EUR = 100*





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



Key take aways in calendar week 10 (Mar 04 – Mar 10)

- Similar rates of +21% for traditional retail and +22% for online sales resulted in an uplift of 21% for the total TCG market.
- Smartphones at +37% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing delivered a moderate minus of 7%.
- Washing machines (+9%) and cooling (+7%) maintained growth but not as high as last week. PTV dropped substantially, at -20%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 10 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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