



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 204

Week 18 of 2024

Powered by **gfknewron**

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Quick, comprehensive, and accessible business insights



> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China

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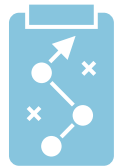
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Fact of the Week

How do smartphone buyers decide?



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52%

... of smartphone buyers have **decided to purchase a certain device** because of the product brand!

+1p.p more than in 2021



Weekly retail insights from the Point of Sale

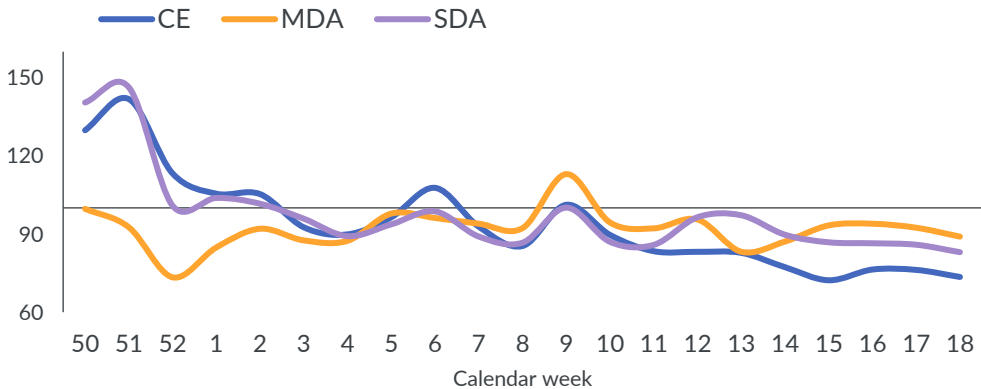
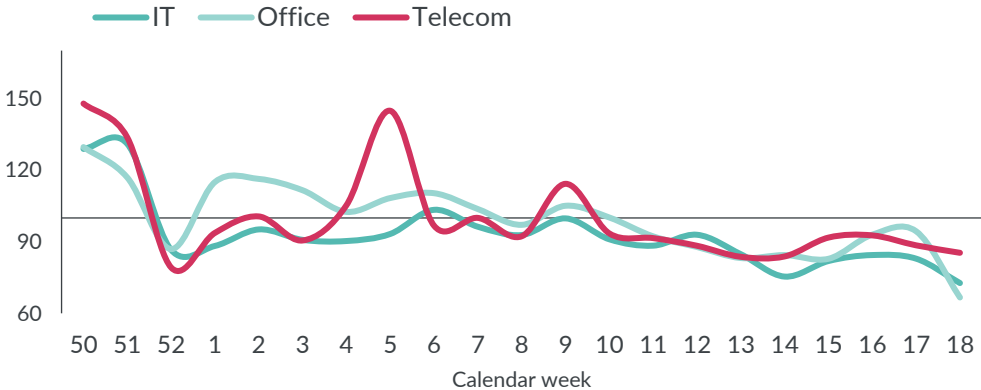
Spotlight on Germany



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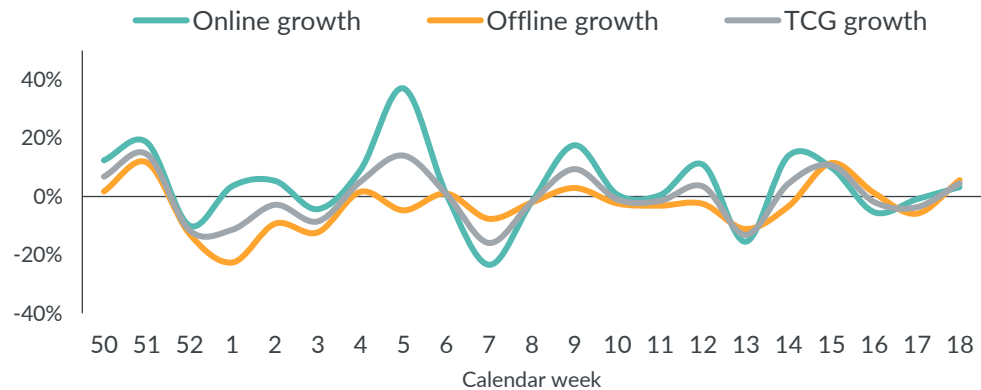
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 18 (Apr 29 - May 05)



- Traditional retail accelerated at +6%. Combined with online sales at +3%, this led to a moderate increase of 4% for the total TCG market.
- Except for monitors at +9%, all other IT/Office products delivered negative trends, ranging between -1% for mobile computing to -12% for laser printers. Smartphones experienced a value increase of 6%.
- MDA/SDA/CE categories delivered a mixed picture with air treatment at an outstanding +32%. Shavers (+10%) and dental care (+14%) also posted growth in double-digits. Soundbars brought up the rear at -8%. TVs experienced a good uplift of 6%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 - 18 2024; Technical consumer goods include: Telecom: Smartphones - IT: Mobile/Desktop 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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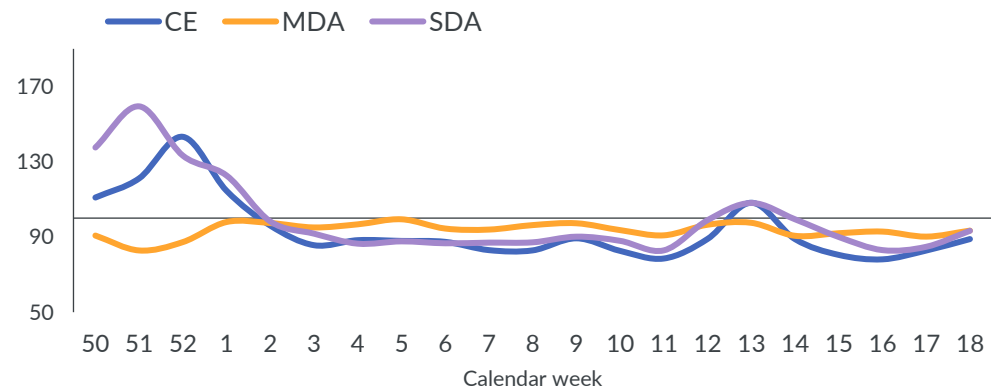
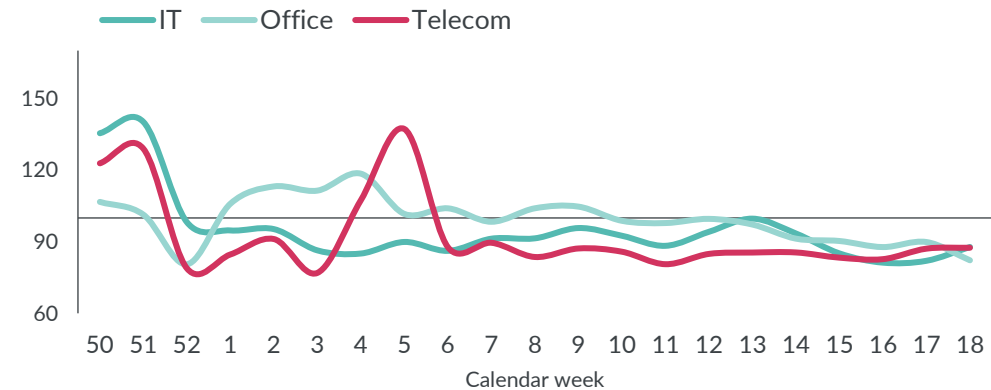
Spain

Japan

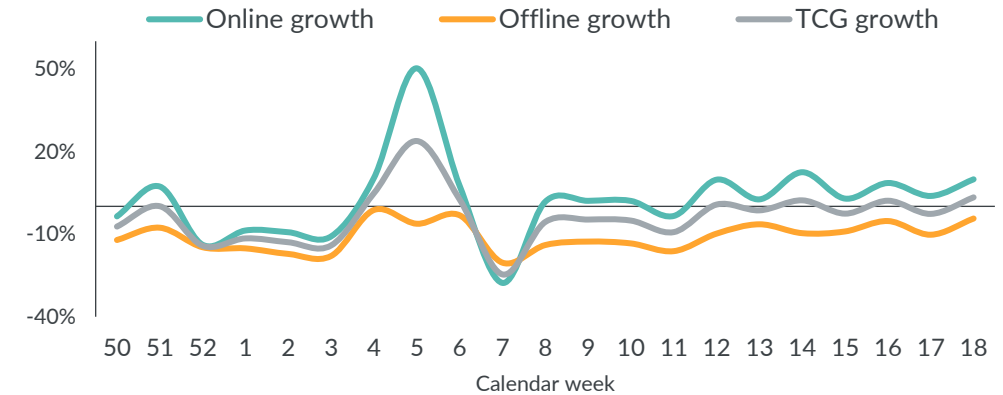
Brazil

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 18 (Apr 29 - May 05)



- Deceleration of traditional retail (-4%) did not cause a downswing of the total TCG market as online sales at 10% compensated and lifted it to +3%.
- Except for media tablets (+4%), all other IT products posted double-digit growth, led by mice at +54%. Monitors at +40% claimed second place. While inkjet printers were flat, laser printers lagged at 8%. Smartphones were up 1%.
- In MDA/SDA/CE products, only cooling (-2%) and vacuum cleaners (-8%) reported negative trends. Dental care at +24% was out in front.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 18 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

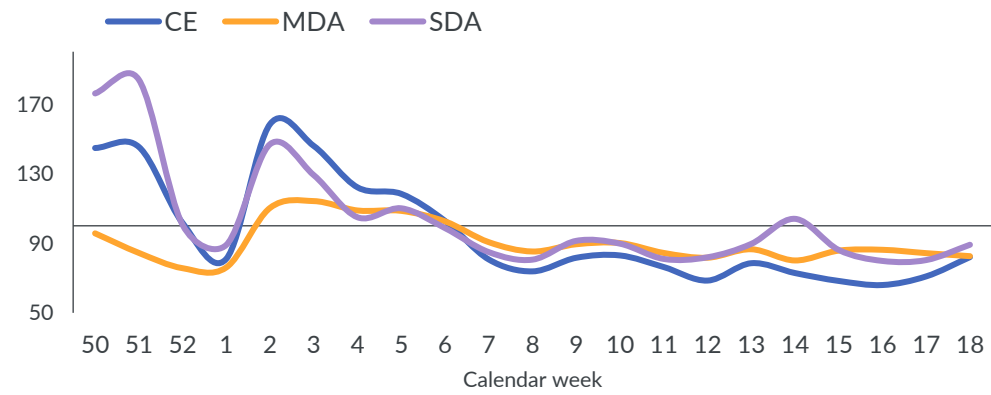
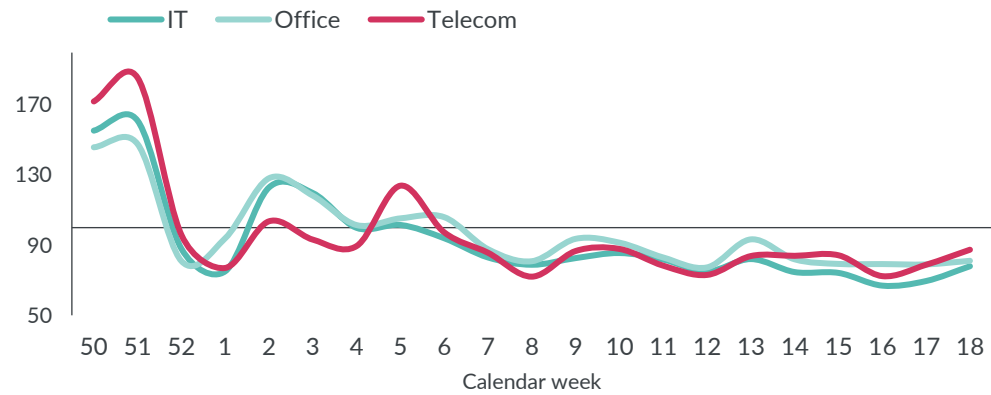
Weekly retail insights from the Point of Sale

Spotlight on France

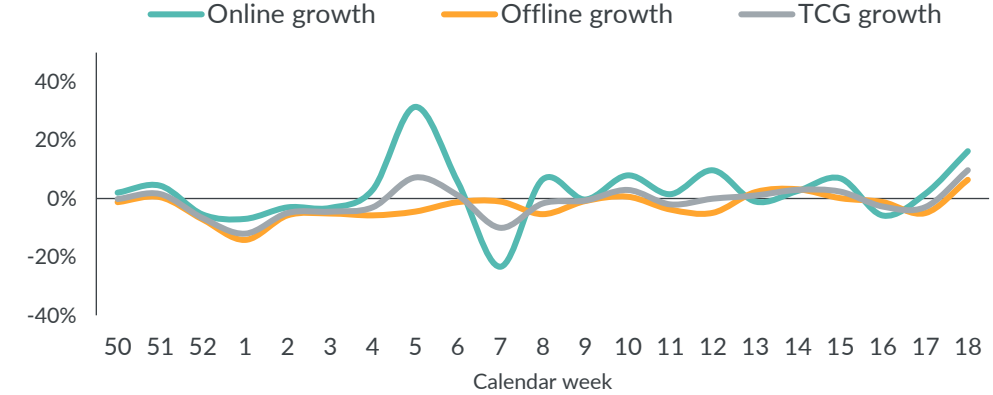


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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 18 (Apr 29 - May 05)



- Online sales at +16% lifted the total TCG market by 10%. Traditional retail added to it with a moderate increase of 6%.
- IT/Office products ranged between +3% for inkjet printers and +31% for monitors. Mice, media tablets, and keyboards delivered double-digit growth as well. Smartphones posted a plus of 10%.
- In week 18, shavers stood out in MDA/SDA products, at +32%. Except for air treatment (-10%), cooling (-3%), and dental care (-1%), all others delivered upswings as well. While audio home systems decreased by 2%, TVs accelerated at 13% and soundbars were up 5%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 18 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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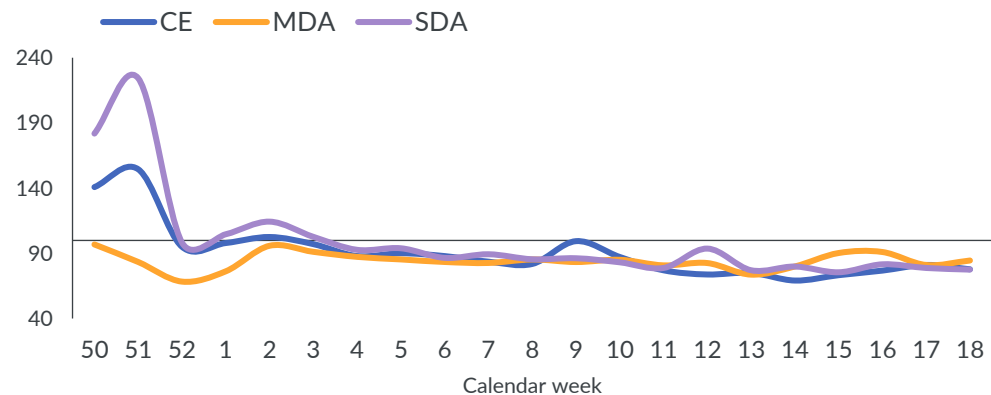
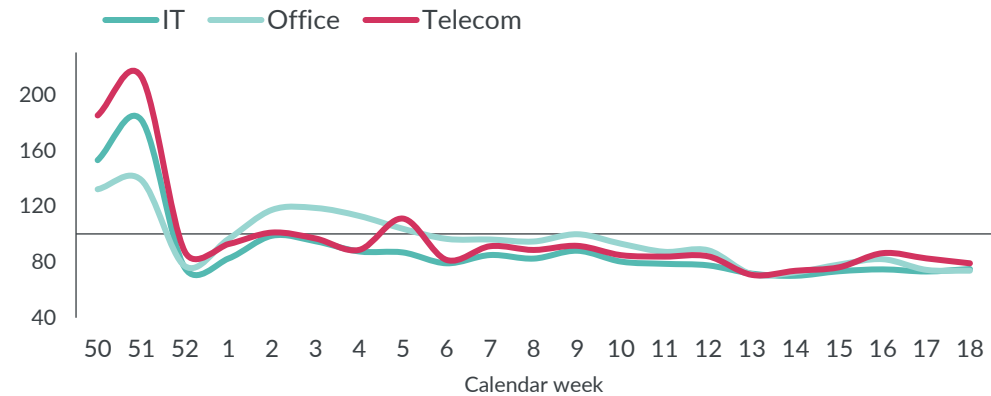
Spain

Japan

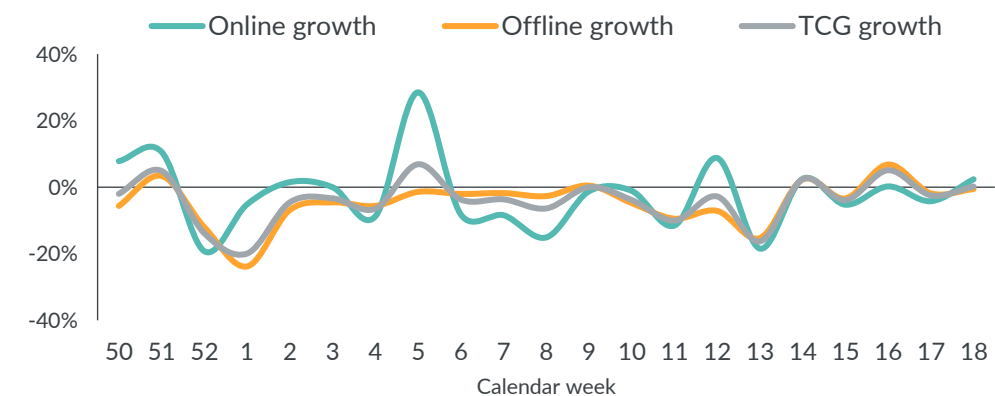
Brazil

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 18 (Apr 29 – May 05)



- Deceleration of traditional retail of 1% and a slight uptick for online sales (+2%) led to a flat total TCG market.
- All IT/Office and telecom products experienced slight and moderate ups and downs, ranging from -8% for inkjet printers to +7% for laser printers. Smartphones were fairly stable at -0.6%.
- In week 18, dental care took the lead at +28%. The other MDA and SDA categories ranged from +18% for hot beverage makers to -4% for cooling. While audio home systems lost 15% and TVs were down 1%, soundbars experienced an uptick of 1%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 18 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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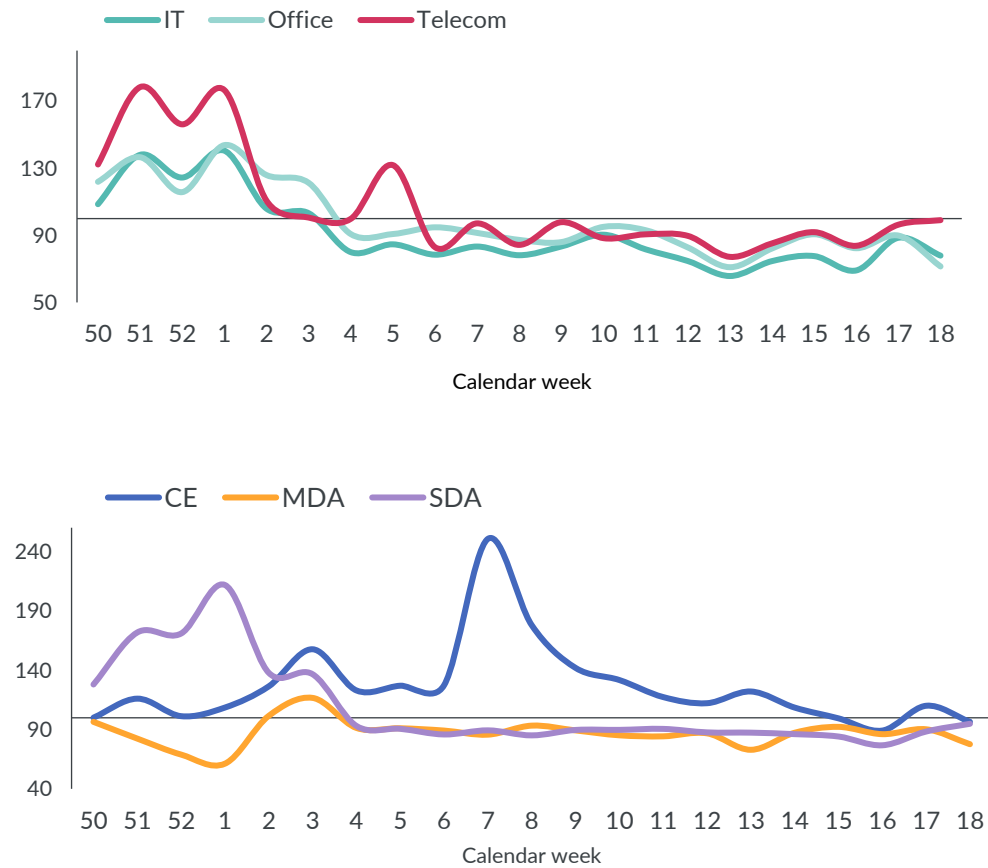
> Spain

Japan

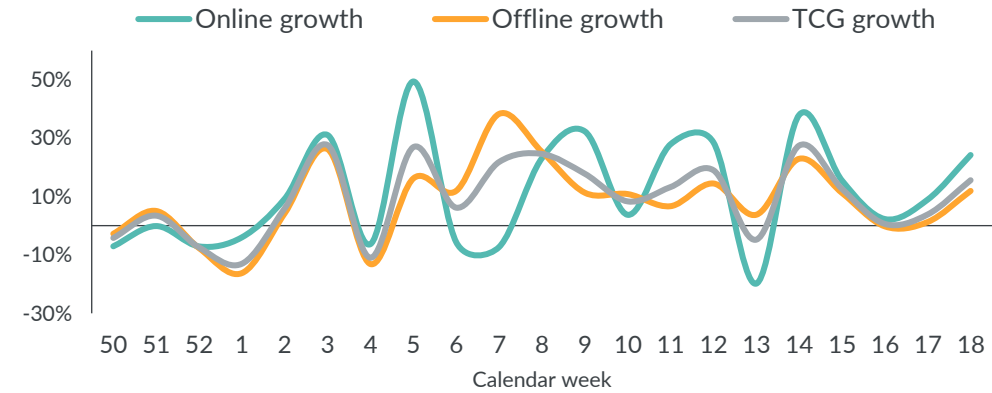
Brazil

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 18 (Apr 29 - May 05)



- Strong development for traditional retail (+12%) and online sales (+24%) led to +16% for the total TCG market (+4% the previous week).
- While media tablets accelerated at +26%, mobile computing experienced a slight uptick of just 4%. Printers lagged at -7% for laser and -10% for inkjet. Smartphones recorded a positive week with a 22% uplift versus the same week in 2023.
- In week 18, PTV led the growth again, at +38%. Within MDA/SDA, vacuum cleaners were in pole position at +28% and hot beverage makers claimed second place at +22%. Cooling brought up the rear at -14%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 - 18 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

Weekly retail insights from the Point of Sale

Spotlight on Japan



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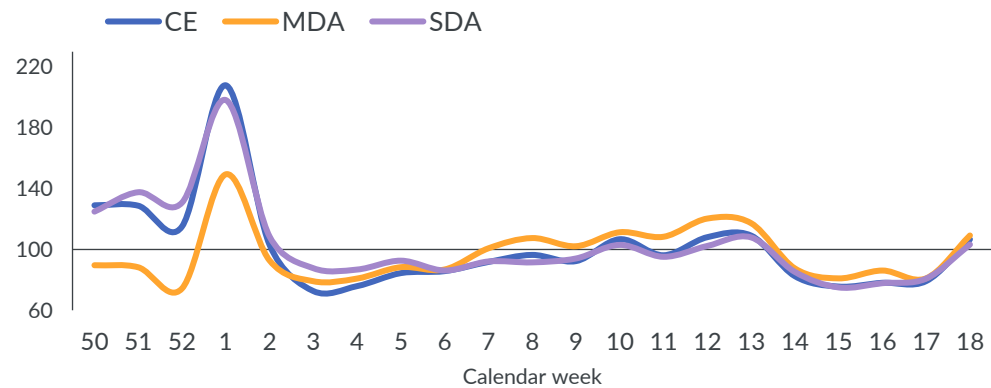
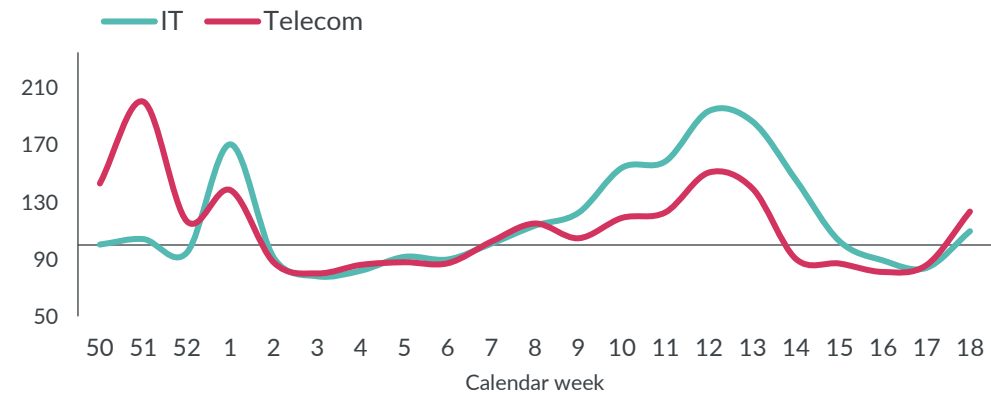
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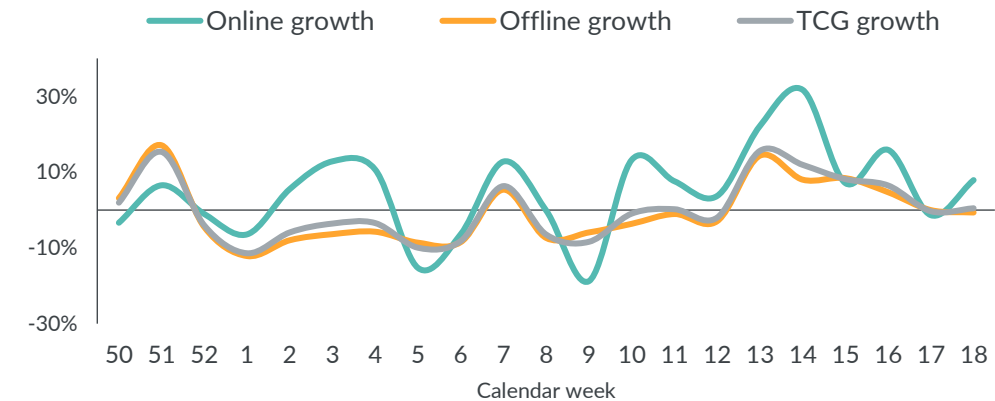
Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 18 (Apr 29 - May 05)



- The total TCG market was flat in week 18. The slight decrease in traditional retail of 1% was counterbalanced by online sales – despite its small share – as its acceleration was big enough – at +8%.
- Both mobile computing and media tablets decreased, by 1% and 20% respectively. Smartphones experienced a solid growth of 17%.
- Mixed trends for SDA products saw shavers in the lead at +13% and hot beverage makers last at -4%. Cooling and washing machines dropped by 3% and 5% respectively. In CE, soundbars fell by 11% while TVs lagged at -4%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 18 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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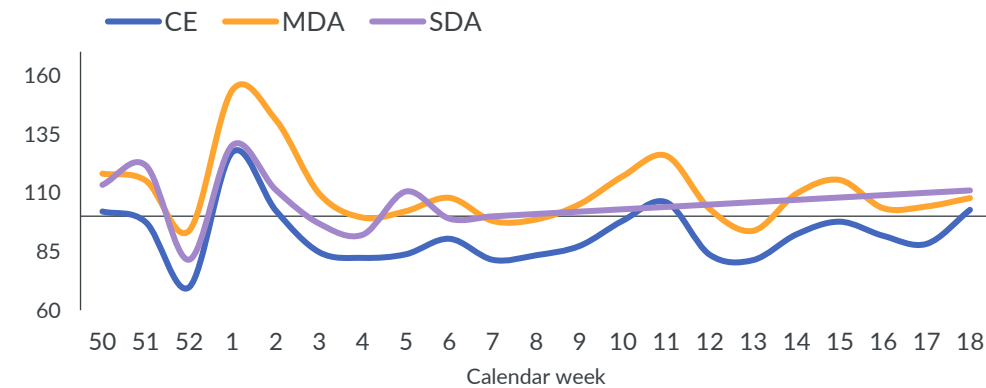
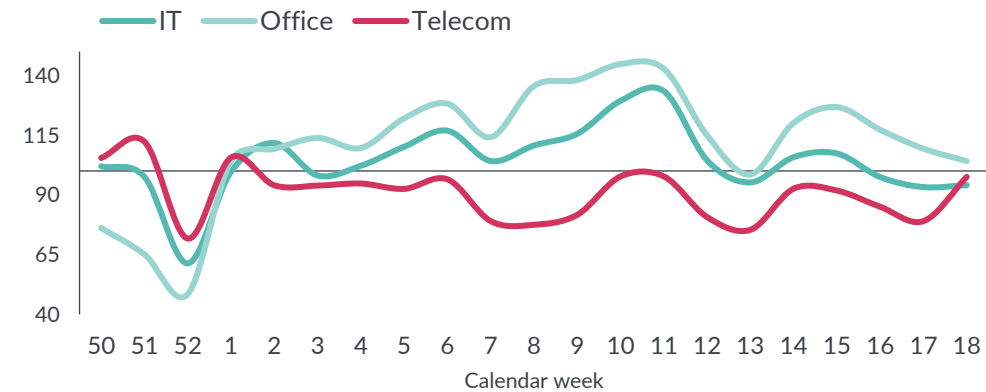
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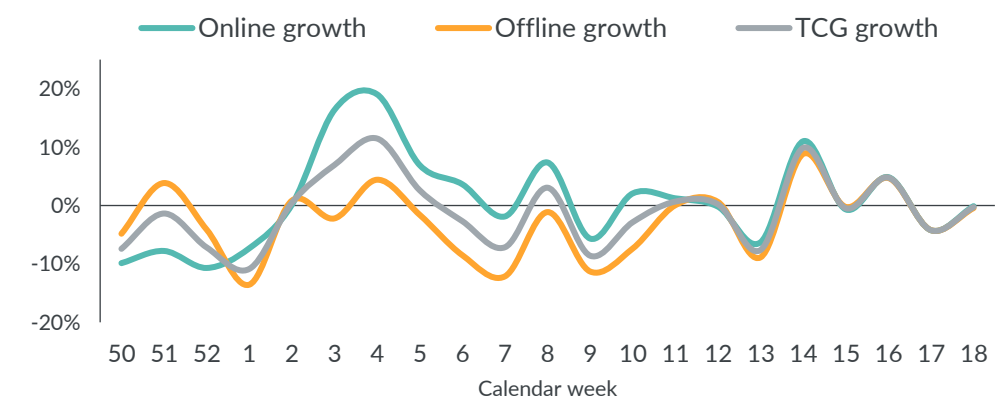
➤ Brazil

China

Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 18 (Apr 29 – May 05)



- Both traditional retail and online sales were flat in week 18, leaving the total TCG market flat.
- IT/Office categories delivered a mixed performance in week 18. Laser printers lost 13% while inkjet printers gained 4%, mobile computing lagged at -7% while media tablets were up 12%. Smartphones lagged at -10%.
- As well as cooling at +19%, vacuum cleaners at +12% posted convincing results. In SDA, the only product group with a negative trend was shavers at -7%. PTVs (+6%) accelerated moderately. Audio home systems slumped at -12%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 18 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 – 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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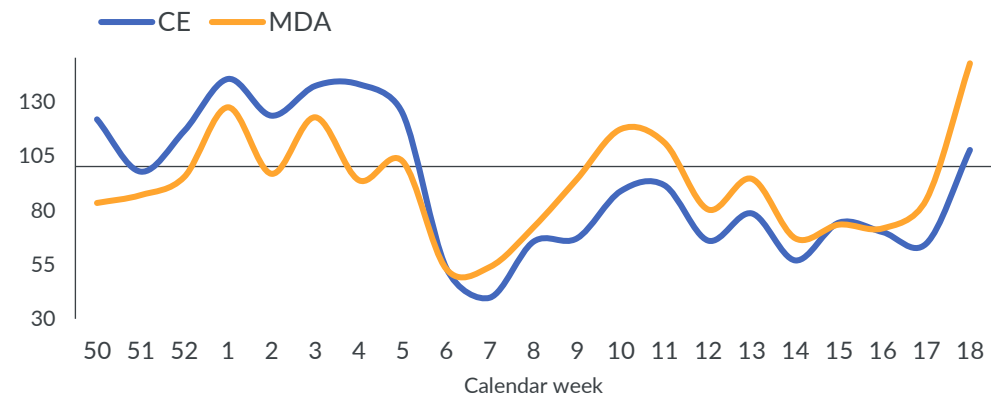
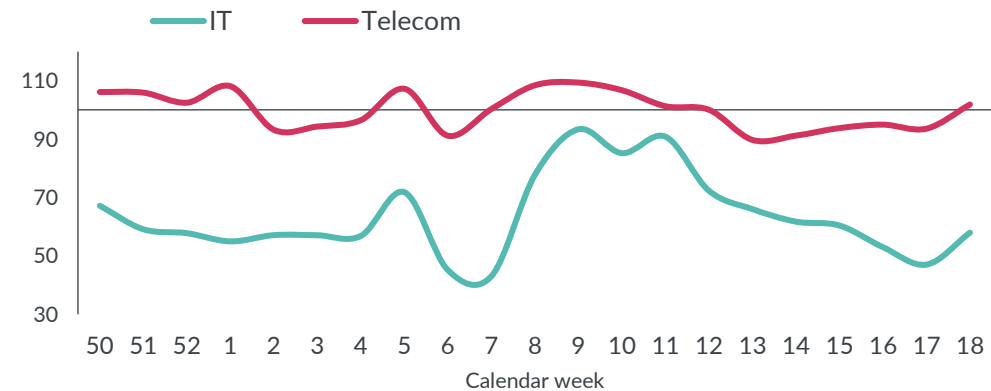
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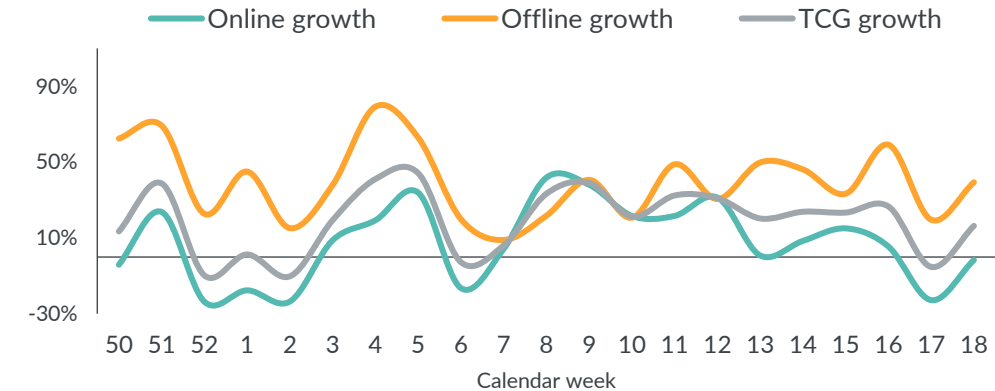
Brazil

➤ China

Index: 2023 average weekly turnover in EUR = 100*



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



Key take aways in calendar week 18 (Apr 29 - May 05)



- Traditional retail delivered very solid results of +39% in week 18. Recovery of online sales, still declining -2% but up from -23% in week 17, led to a good result for the total TCG market, posting +16% (up from -5% in week 17).
- Smartphones at +18% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing delivered a minus of 10%.
- Washing machines (+8%) and cooling (+6%) recovered from deceleration in week 17. PTV convinced at +11%, up from -35% in week 17.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 - 18 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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