



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 205

Week 19 of 2024

Powered by **gfknewron**

Simplify your data analysis journey

Quick, comprehensive, and accessible business insights



> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China

In an era where market fluctuations are the norm, having a finger on the pulse of weekly changes is crucial. **gfknewron** offers more than just data; it provides clarity and direction in a sea of information so you can act based on the most current facts.

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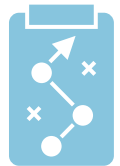
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- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
- **gfknewron Consumer** – Understand your shoppers, reach the right audience and maximize ROI
- **gfknewron Predict** – Forecast marketing potential, build the right strategies and optimize revenue

Fact of the Week

Price push comes from the premium end of the market

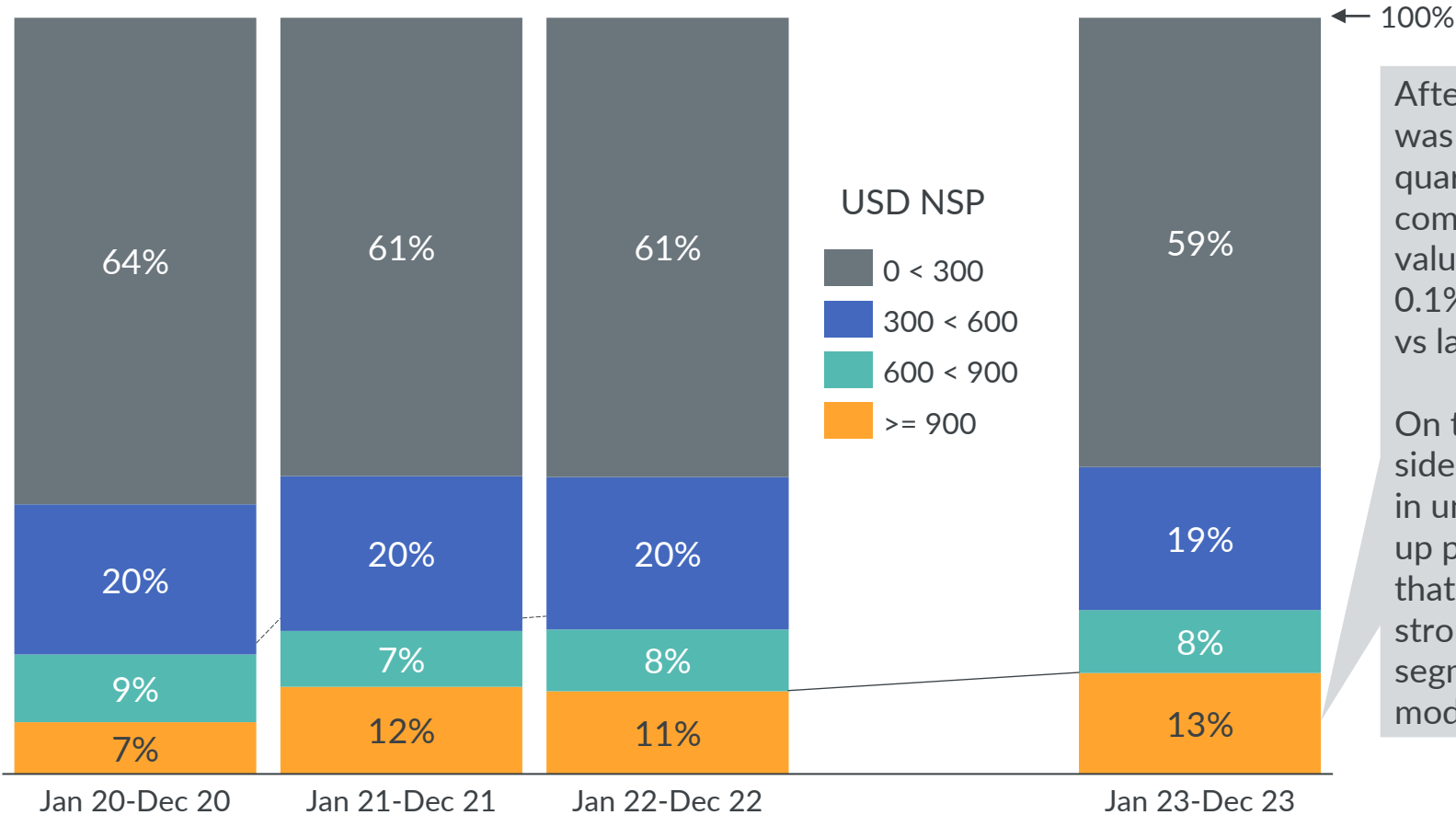


About **gfknewron**

> Fact of the week

- Germany
- Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

Smart/Mobile Phones | International Coverage excl. North America | Sales Units%



After the Smartphone market was challenged for the first three quarters of 2023, the last quarter compensated for most of the value losses – and it finished at -0.1% in USD NSP revenue vs last year.

On the other hand, the demand side was still in decline, at -6.3% in units. Innovation has leveled up prices and we can observe that in price classes. The strongest push came from the segment representing flagship models.

Weekly retail insights from the Point of Sale

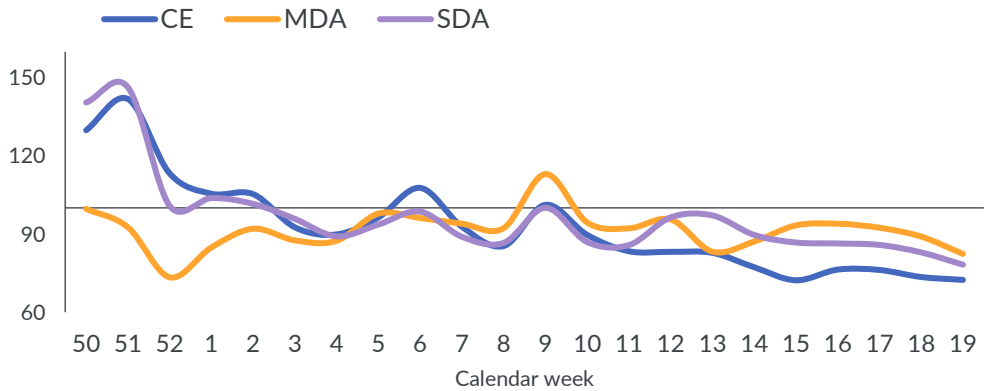
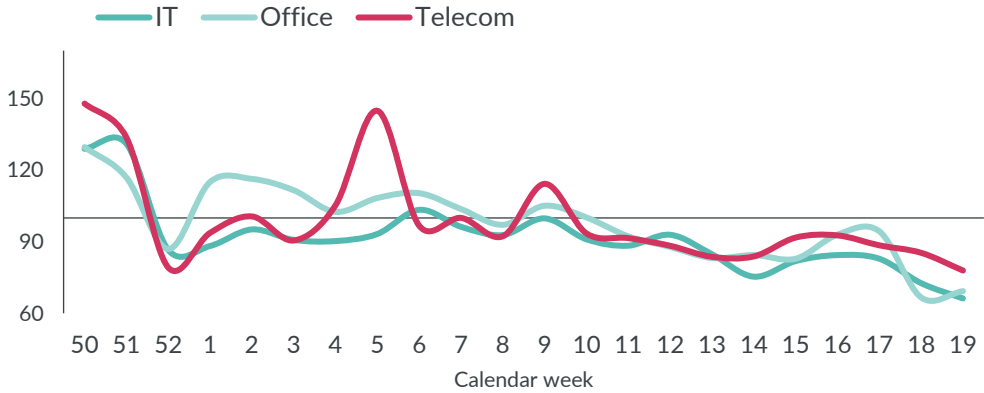
Spotlight on Germany



- About **gfknewron**
- Fact of the week
- > Germany**
- Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

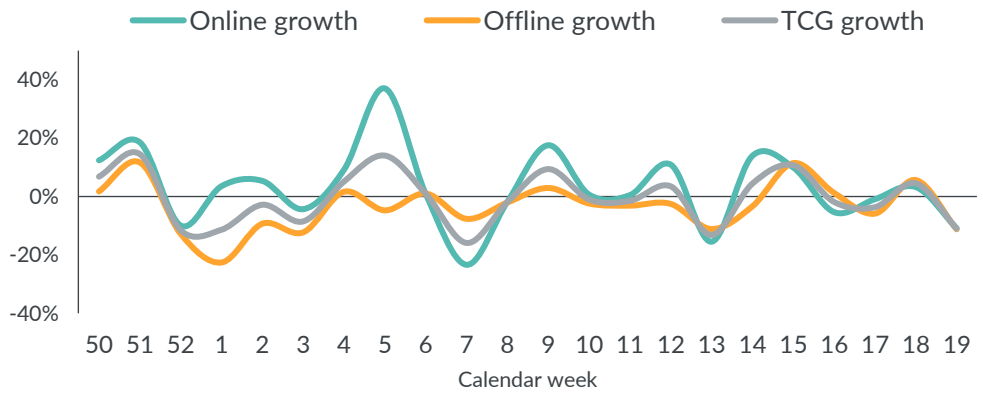
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 19 (May 06 – May 12)



- At an identical rate of -11%, both traditional retail and online sales retail dragged the total TCG market down by -11%.
- All IT/Office and telecom products lost in solid double digits, ranging from -11% for smartphones to -36% for desk computing.
- Shavers was the only product group with a positive trend in week 19, at +1%. All other product groups experienced downswings. The least hit categories were PTV at -4%, hot beverage makers at -5%, and audio home systems and dental care at -6%. Among MDA/SDA/CE products, food preparation posted the highest negative score, at -21%

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 19 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.

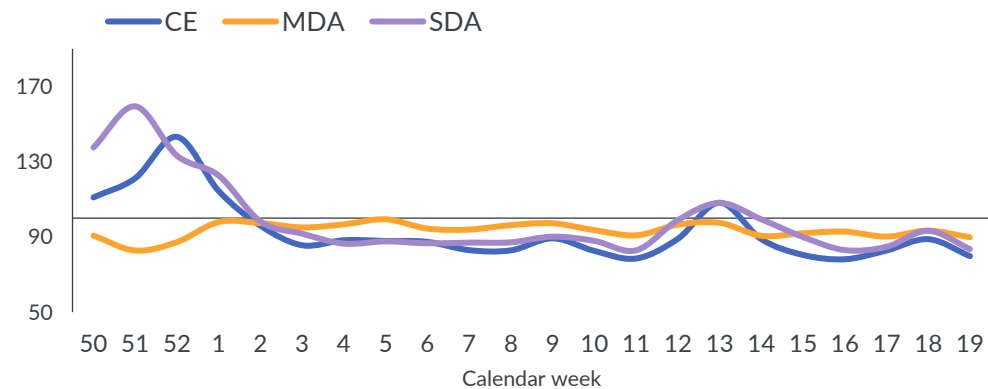
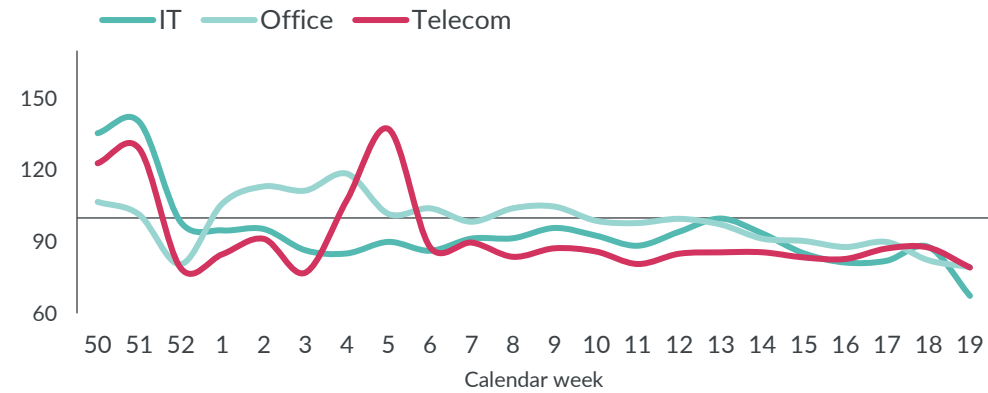
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

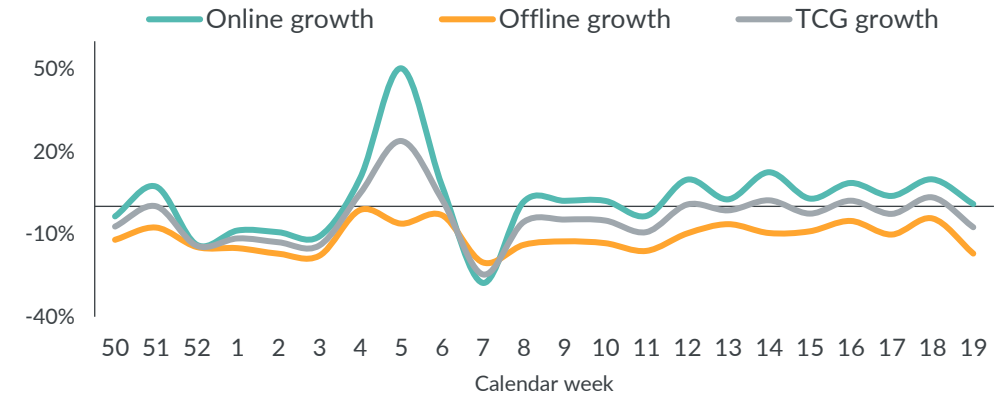


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

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 19 (May 06 – May 12)



- Deceleration of traditional retail (-17%) dragged the total TCG market down by -8%. Online sales at a weak +1% was not able to compensate.
- IT/Office products were led by peripherals. Mice grew at +15% and keyboards at +6%. Monitors were up 9%. Media tablets and laser printers marked the other end of the scale, at -38% and -29%. Smartphones decelerated at -12% while headsets posted good results at +22%.
- Shavers (+11%) and food preparation (+12%) were the best-performing categories within MDA and SDA. All others grew or declined moderately. Washing machines and audio home systems were almost flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 19 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

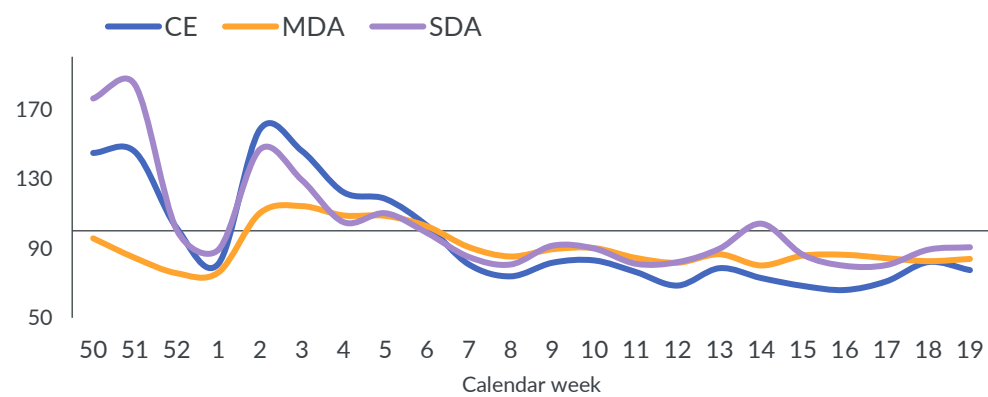
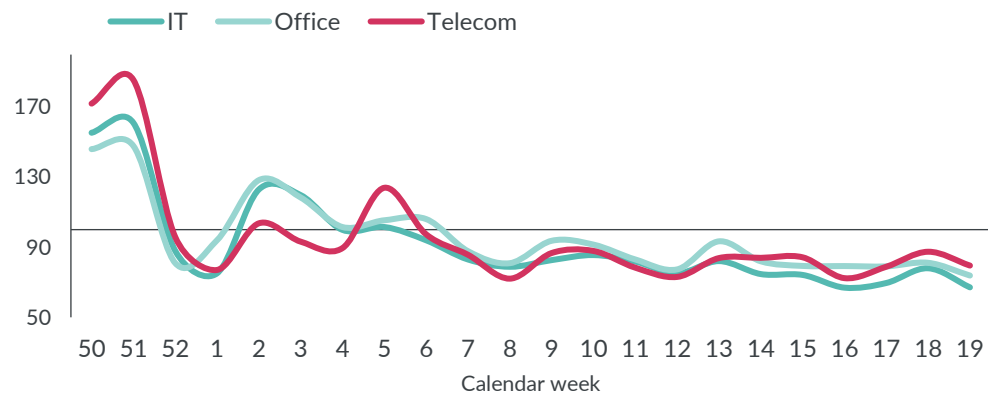
Weekly retail insights from the Point of Sale

Spotlight on France

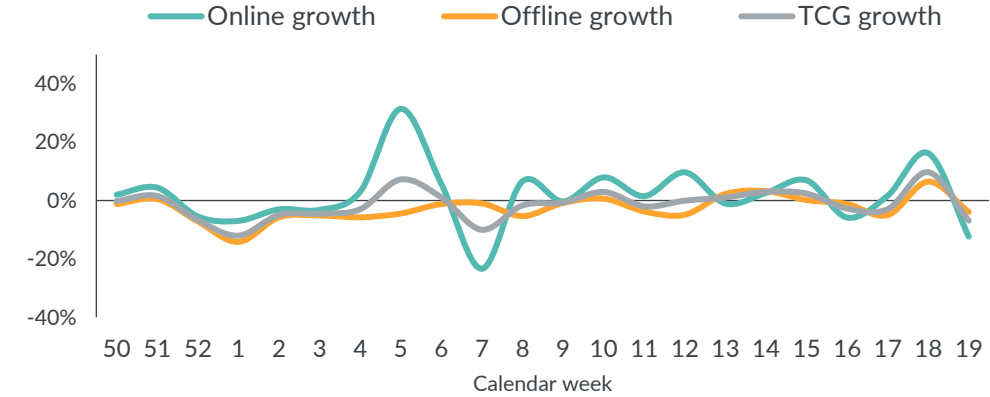


- About **gfknewron**
- Fact of the week
- Germany
- Great Britain
- > France
- Italy
- Spain
- Japan
- Brazil
- China

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 19 (May 06 – May 12)



- Online sales at -12% dragged the total TCG market down by 7%. Traditional retail added to it with a downswing of 4%.
- Week 19 saw an opposite picture for printers. While laser printers gained 17%, inkjet models lost 19%. Similarly negative were desk computing at -18%, keyboards at -12%, and media tablets at -11%. Smartphones lagged at -6%.
- In week 19, air treatment stood out in MDA/SDA products, at -33%. Cooling claimed second place, at -10%. All others delivered slight ups and downs of less than 10%. TVs lagged at -6%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 19 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): 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

Germany

Great Britain

France



Italy

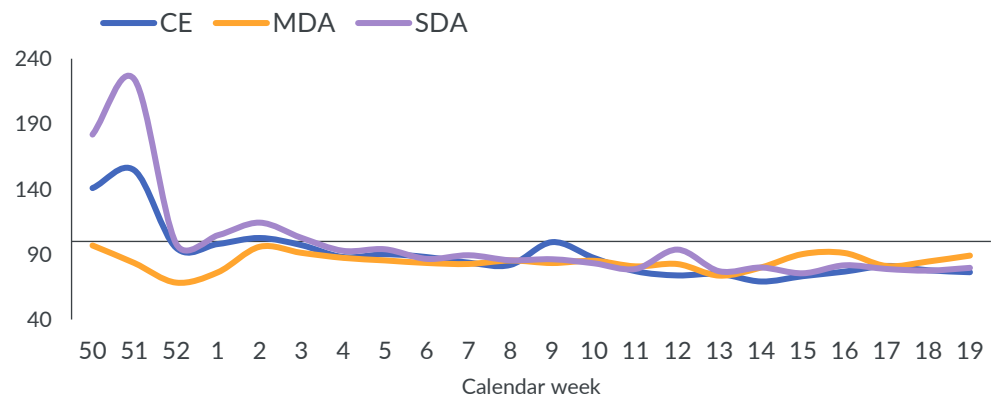
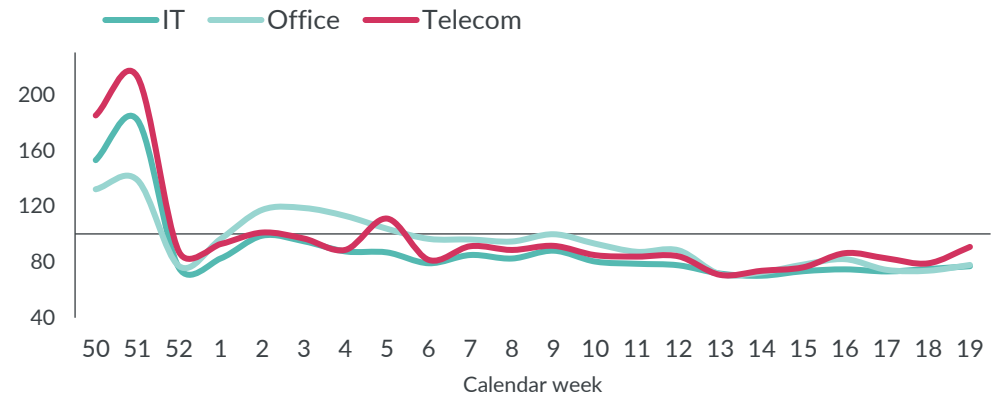
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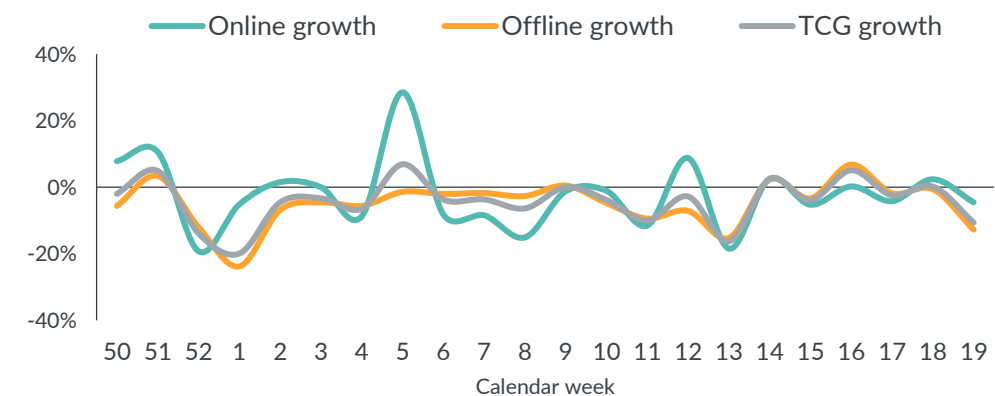
Brazil

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 19 (May 06 – May 12)



- Deceleration of traditional retail (-13%) dragged the total TCG market down by -11%. Online sales added to it by delivering -4%.
- All IT/Office and telecom products saw solid negative trends, ranging from -10% for smartphones to -26% for inkjet printers and desk computing.
- In week 19, dental care took the lead at +18%, and hot beverage makers claimed second place at +11%. The other MDA and SDA categories posted negative trends from -7% for washing machines to -14% for air treatment. Audio home systems and soundbars decelerated at -21% and -22% respectively.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 19 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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Fact of the week

Germany

Great Britain

France

Italy

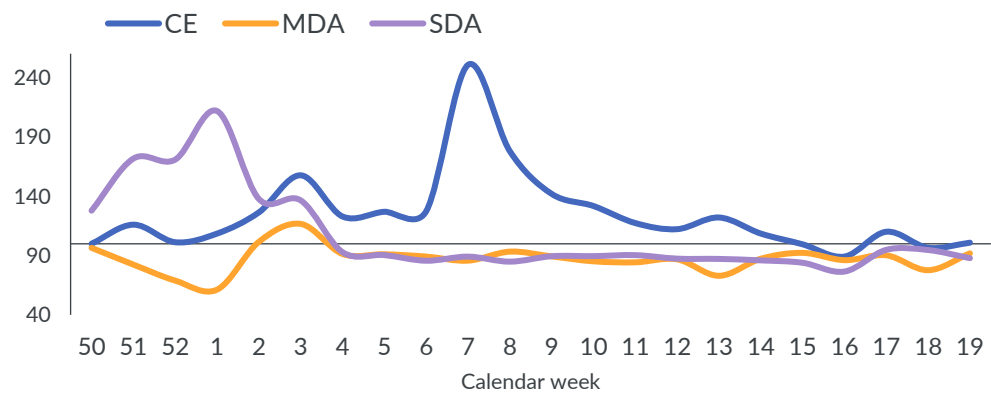
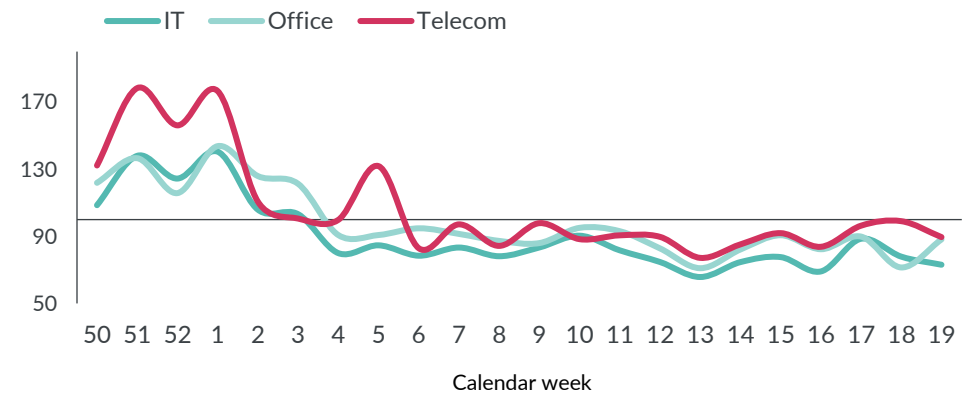
> Spain

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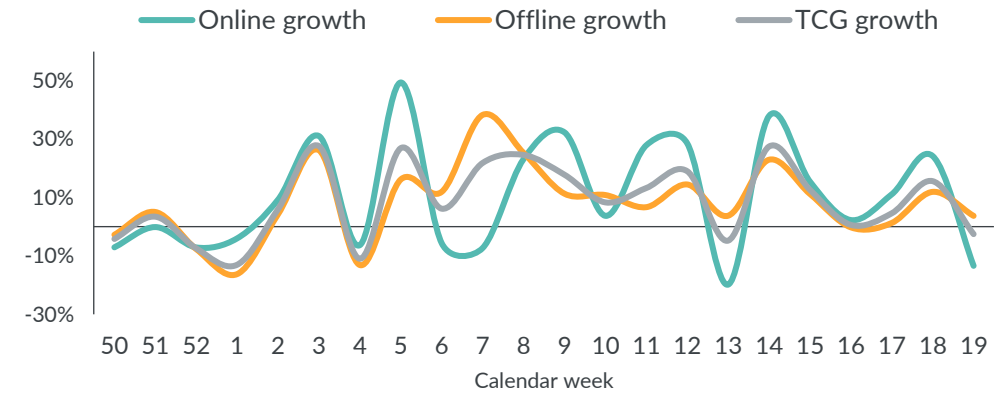
Brazil

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 19 (May 06 – May 12)



- While traditional retail posted a plus of 4%, online sales lost its dynamics and posted a weak -13% (compared to +24% in week 18), leading to -3% for the total TCG market (+16% the previous week).
- Except for flat laser printers, all other IT/Office products posted negative trends, ranging from -5% for inkjet printers to -28% for desk computing. Smartphones experienced a slight uptick of 2%.
- In week 19, cooling brought up the rear in MDA/SDA products, at -18%. Hot beverage makers at +12% marked the other end of the scale. While audio home systems at -19% did not perform well, TVs gained 9%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 19 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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Fact of the week

Germany

Great Britain

France

Italy

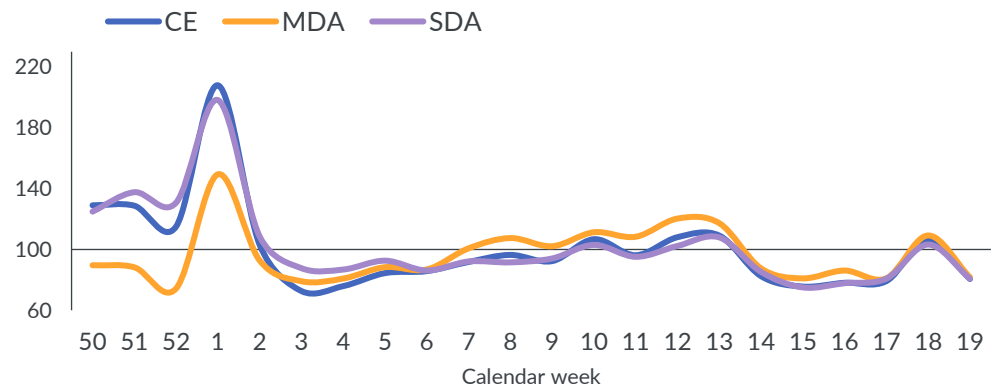
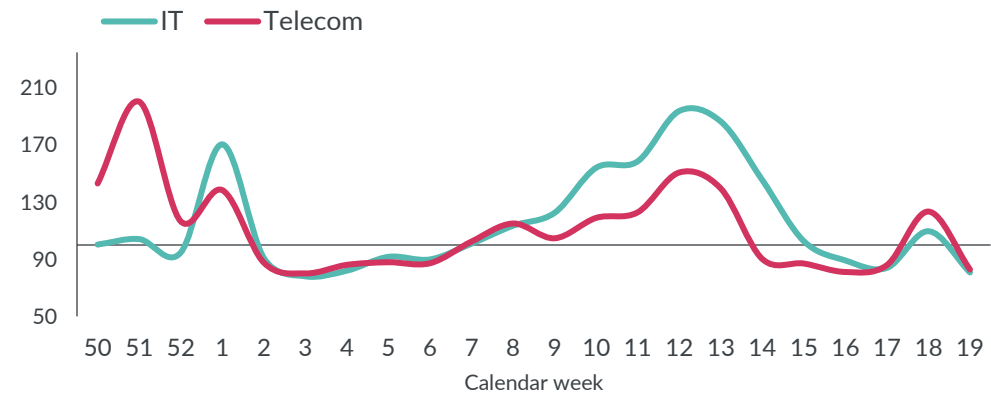
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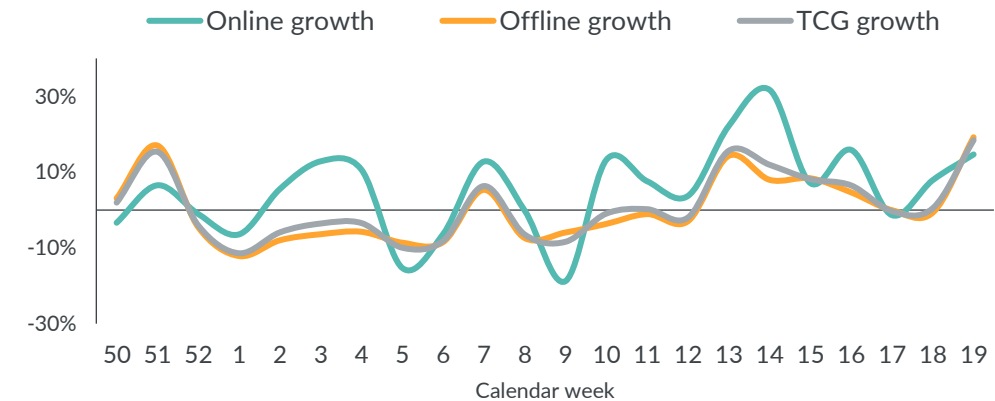
Brazil

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 19 (May 06 – May 12)



- Traditional retail at +19% and online sales at +15% led to an average acceleration of 18% for the total TCG market.
- Week 19 brought a good, double-digit development for IT and telecom products with smartphones in the lead at +37%. Headsets posted +13%.
- There were double-digit uplifts for most MDA/SDA products and PTV, with shavers in the lead at +22%. Audio home systems at +7%, hot beverage makers at +3%, and soundbars and air treatment at +2% were a bit behind.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 19 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**

Fact of the week

Germany

Great Britain

France

Italy

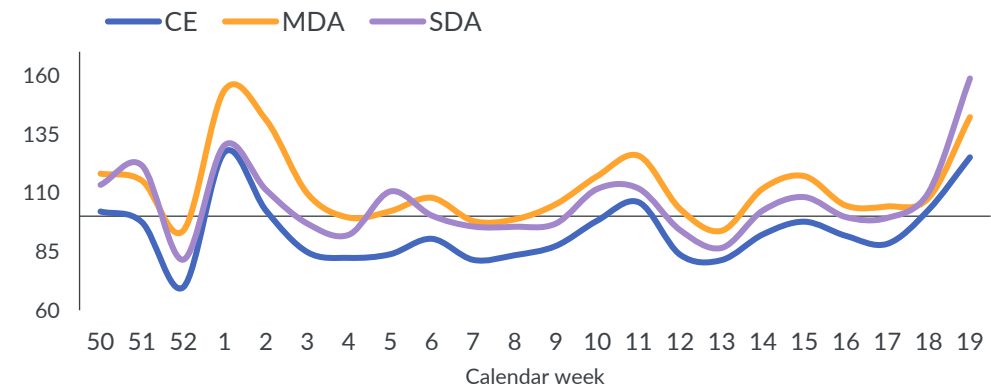
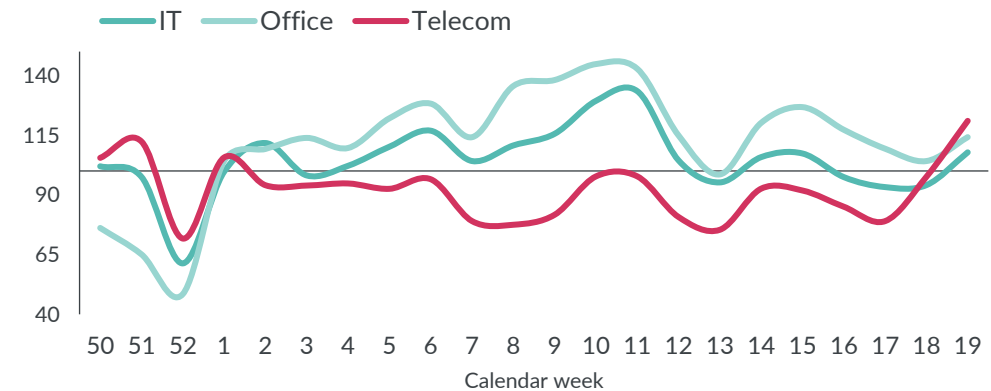
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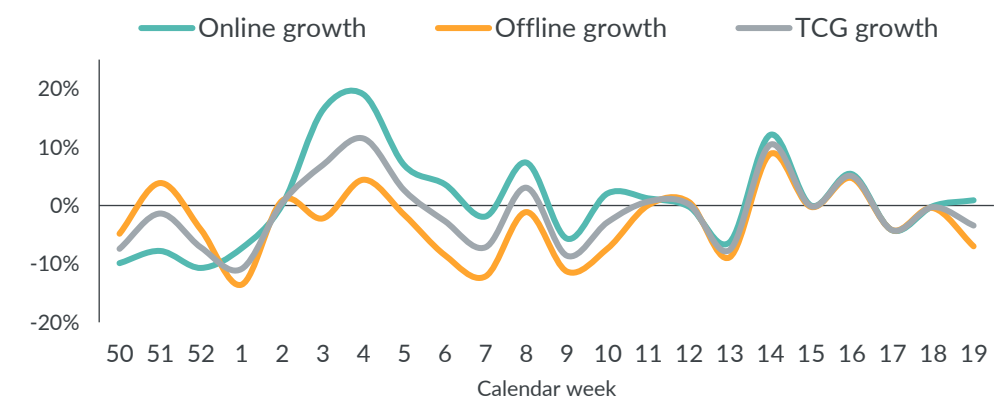
➤ Brazil

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 19 (May 06 – May 12)



- Traditional retail delivered -7% which dragged the total TCG market down by 3%. Online sales at +1% was not able to compensate.
- Media tablets at +17% were the best-performing category in week 19. Desk computing claimed growth as well, at +7%. Laser printers and mobile computing posted negative trends. Smartphones slumped at -12%.
- Among MDA/SDA products, only shavers (-5%) delivered negative trends. At +17%, vacuum cleaners took the lead. Cooling was next at +15%. Hot beverage makers were flat. TVs posted a slight downswing of 2%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 19 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



About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

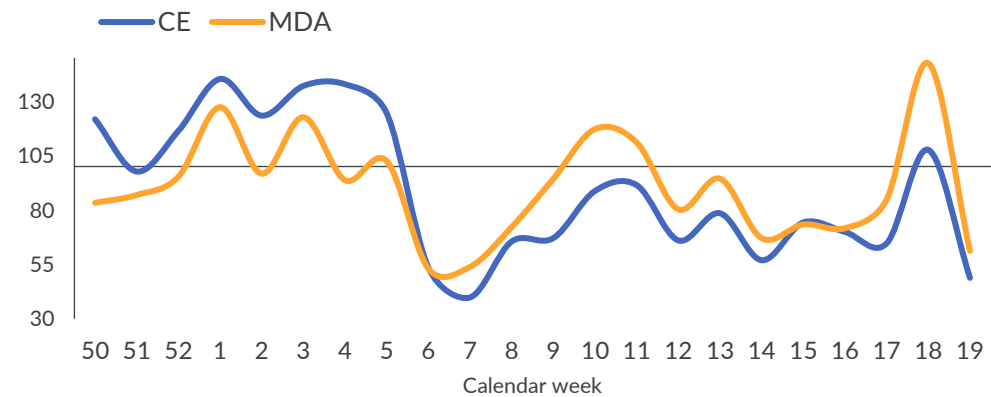
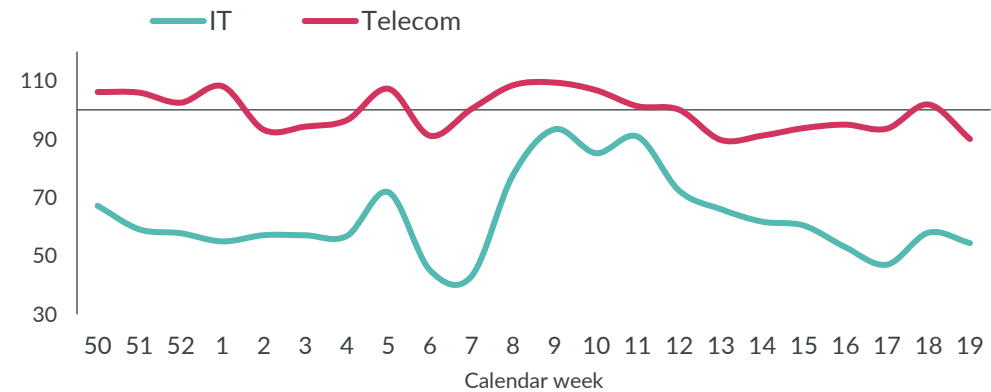
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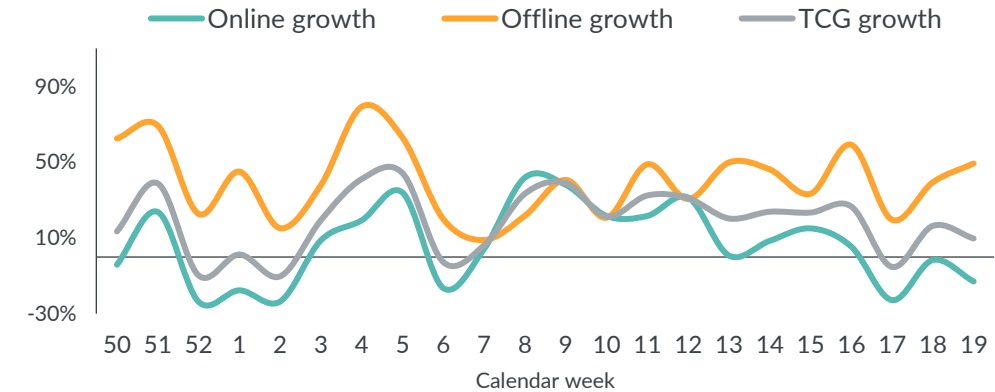
Brazil

➤ 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 19 (May 06 – May 12)



- Traditional retail delivered very solid results of +49% in week 19. Combined with declining online sales (-13%) this led to a plus of 10% for the total TCG market, posting +10%.
- Smartphones at +15% 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 9%.
- PTV experienced a strong drop of -16%, down from +11% in week 18. While washing machines still posted a positive trend of 3% (down from +8% in week 18), cooling delivered -2% (down from +6%).

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 19 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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