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Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 208

Week 22/23 of 2024

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> About **gfknewron**

Fact of the week

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France

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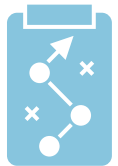
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- **gfknewron Predict** – Forecast marketing potential, build the right strategies and optimize revenue

Fact of the Week

High PTV demand during COVID-19 still halo into the market.



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> Fact of the week

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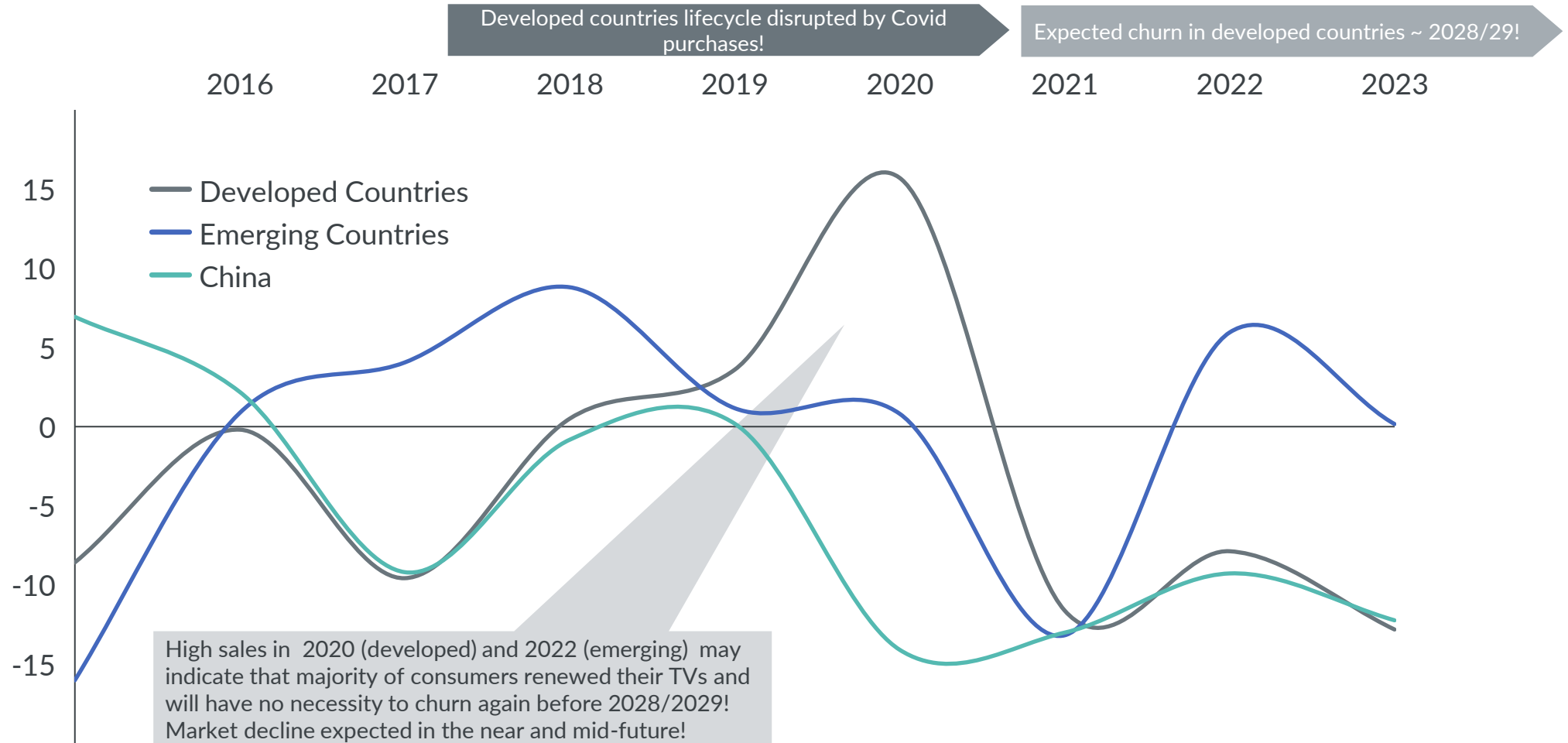
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Weekly retail insights from the Point of Sale

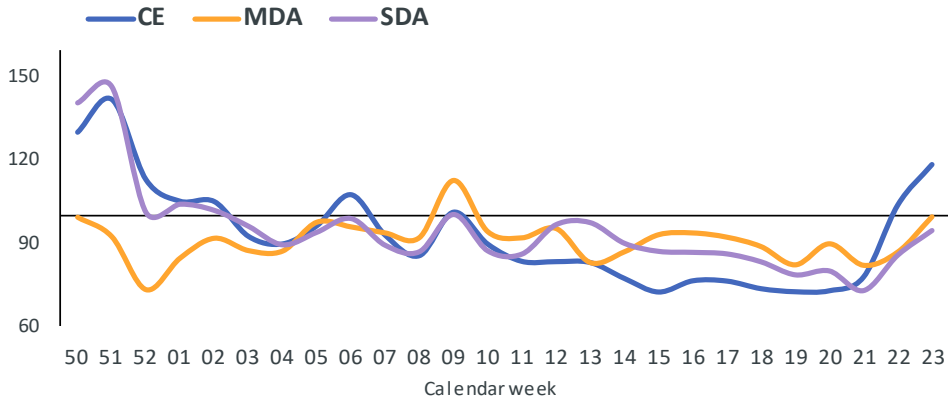
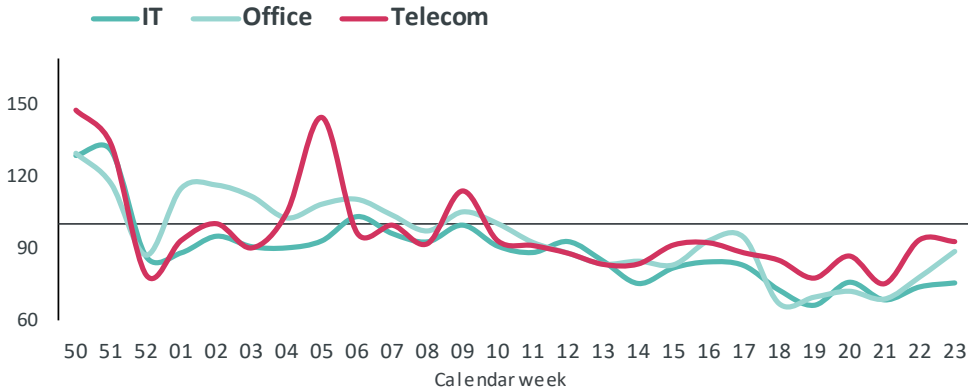
Spotlight on Germany



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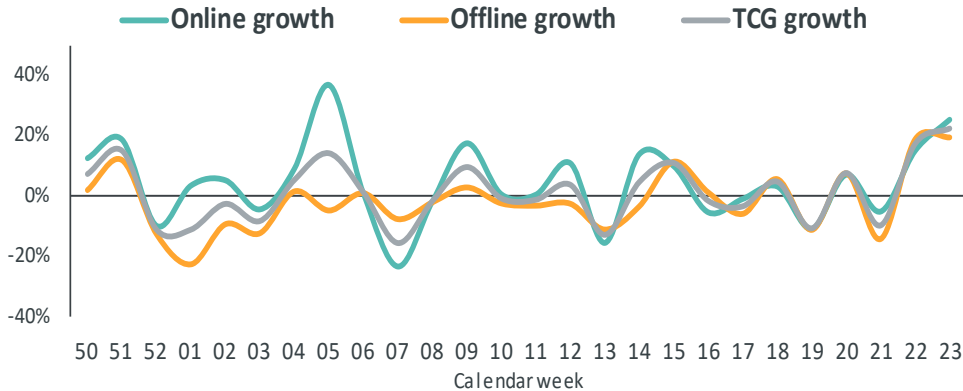
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 23 (Jun 03 – Jun 09)



- A strong increase in online sales (+25%) lifted the total TCG market to a plus of 22%. Traditional retail added to it at +19%.
- Except for flat desk computing, all other IT/Office and telecom products won in solid double digits, ranging from +10% for mobile computing to +28% for laser printers. Smartphones increased by 15%.
- PTV stood out in week 23 - at +101% - in anticipation of the upcoming UEFA European Soccer Championship. Air treatment and food preparation slumped at -48% and -28% respectively. All other MDA/SDA/CE categories delivered solid growth except for weaker cooling and shavers.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 23 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.

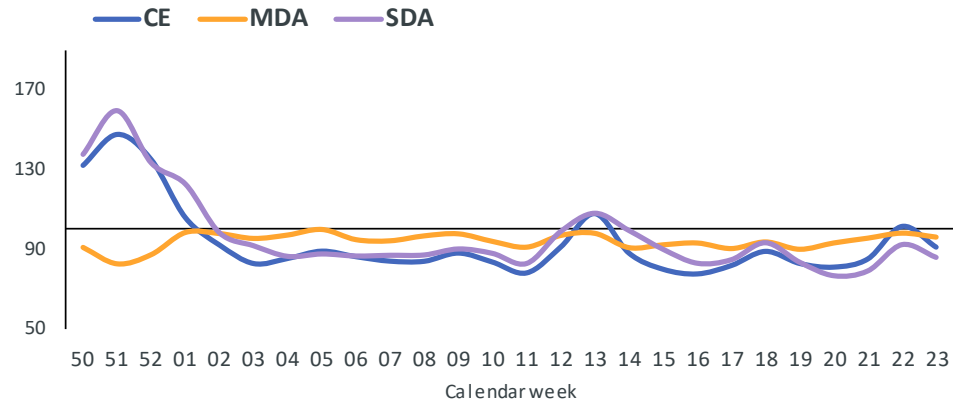
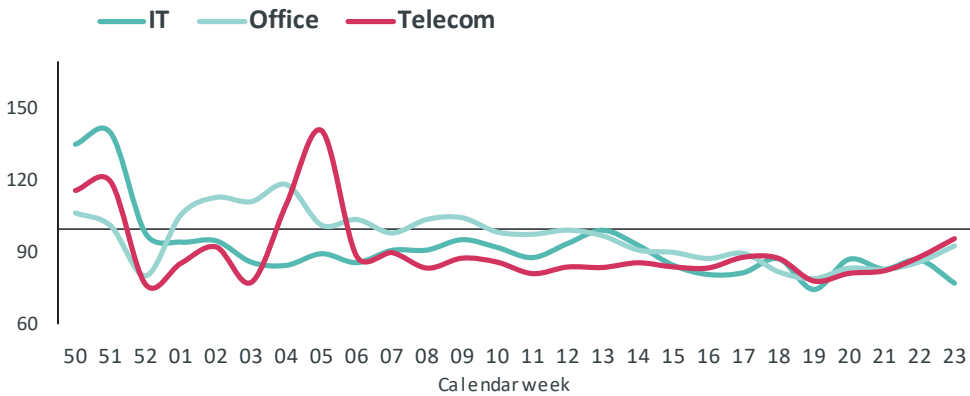
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

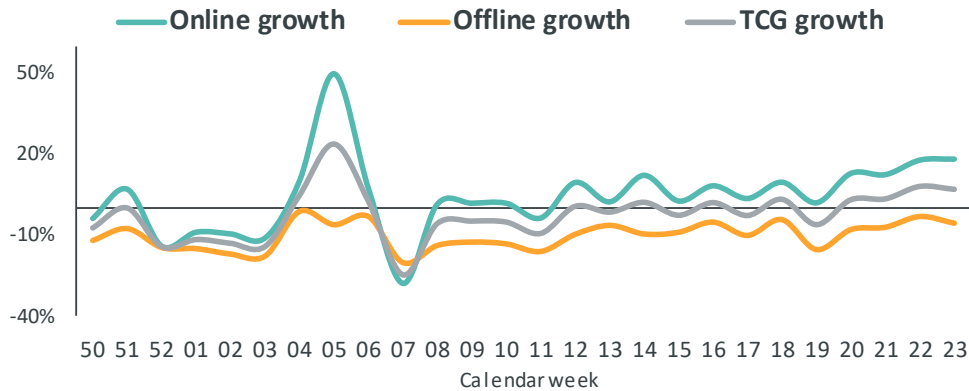


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 23 (Jun 03 – Jun 09)



- The solid growth in online sales, at +18%, raised the total TCG market by 7% but it was impacted by the deceleration of traditional retail (-6%).
- Except for laser printers at -1% and media tablets at +3%, all other IT/Office products delivered good growth, ranging from +11% for mobile computing to +37% for mice. Smartphones experienced an uptick of 2%.
- Strong increases for CE categories showed PTV at a plus of 29%. Except for cooling at -2% and flat shavers, the other MDA/SDA product groups delivered growth from +6% for washing machines to +17% for hot beverage makers.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 23 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

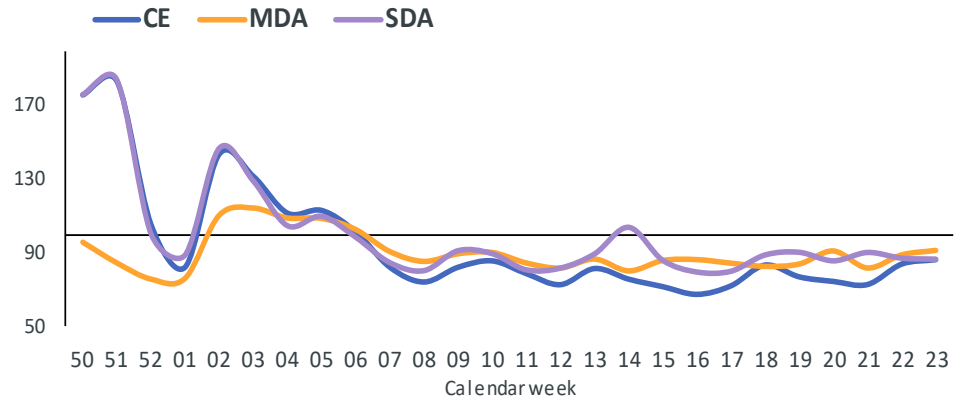
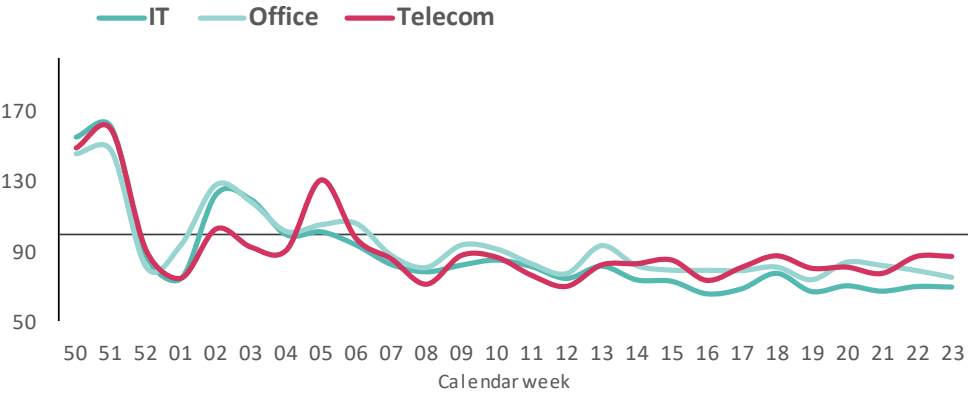
Weekly retail insights from the Point of Sale

Spotlight on France

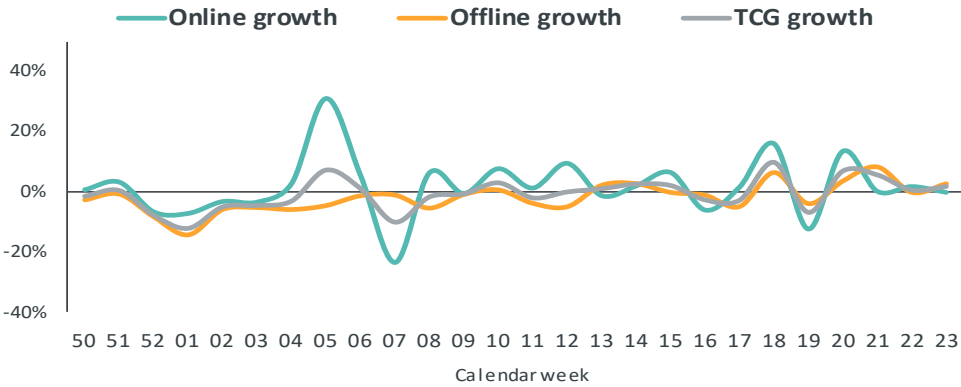


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 23 (Jun 03 – Jun 09)



- Flat online sales and traditional retail at +3% led to a slight upswing for the total TCG market of 2%.
- Week 23 saw a mixed picture for IT/Office products, with monitors and media tablets in the lead at +11% and laser printers bringing up the rear at -23%. Smartphones lagged at -8%.
- In week 23, air treatment stood out in MDA/SDA, at -70%. Cooling claimed second place at -16%. Food preparation was flat. Dental care delivered a strong result at +40%. Within CE products, PTV led at +27%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 23 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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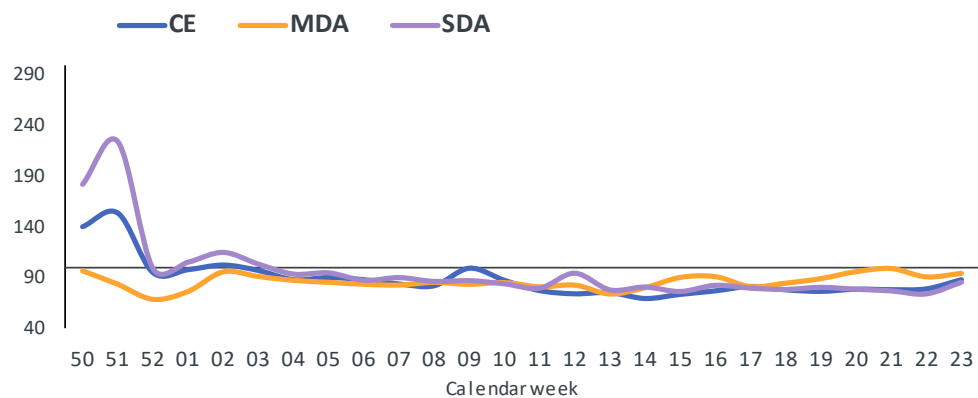
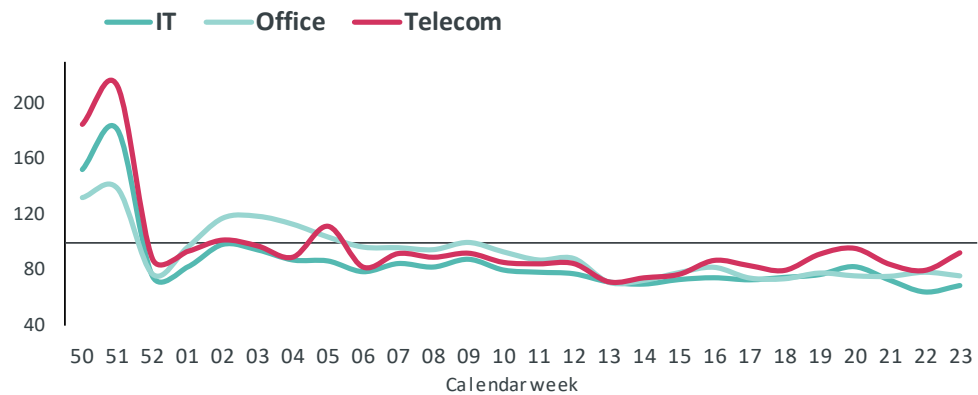
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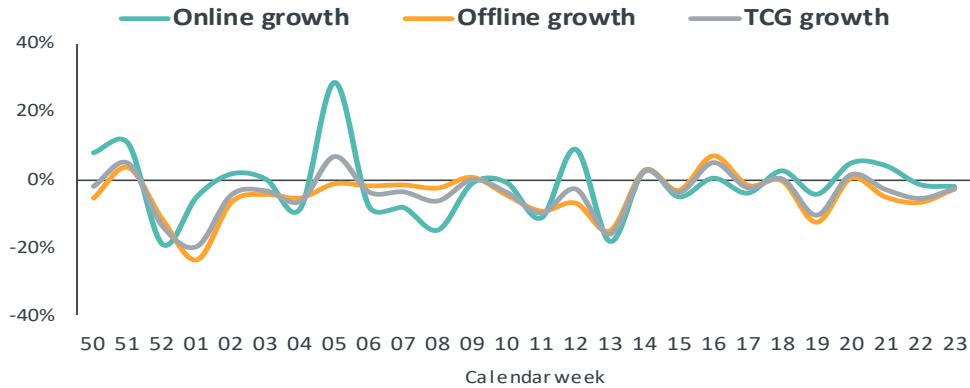
Brazil

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 23 (Jun 03 – Jun 09)



- Close rates of -2% for online sales and -3% for traditional retail led to the deceleration of the total TCG market of -3%.
- All IT/Office products saw negative trends, ranging from -7% for mobile computing to -15% for media tablets. Smartphones were flat.
- In week 23, hot beverage makers took the lead at +19%, and dental care claimed second place at +18%. MDA categories populated the other end of the scale, posting -15% (cooling) and -13% (washing machines). PTVs posted a moderate uplift of 7%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 23 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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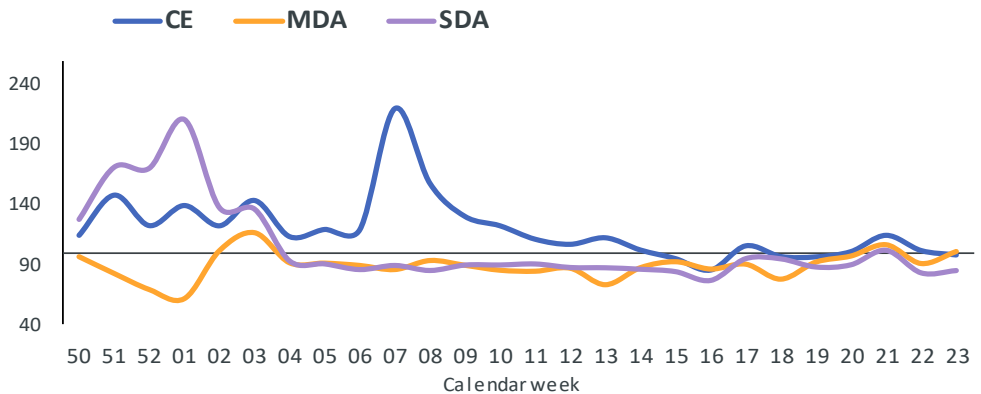
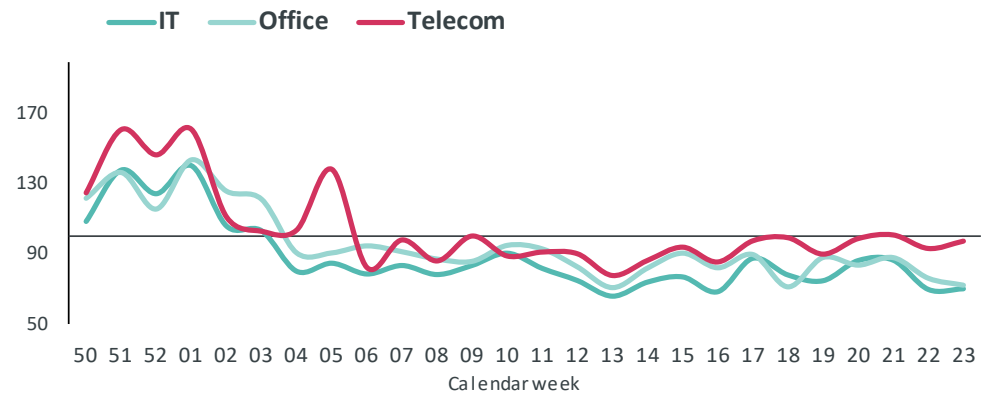
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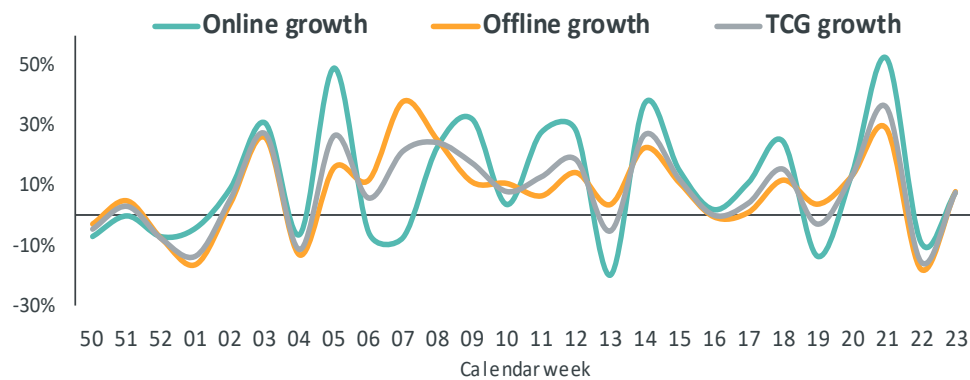
Brazil

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 23 (Jun 03 – Jun 09)



- At an identical rate of +8%, both traditional retail and online sales retail lifted the total TCG market by +8%.
- The mixed picture for IT/Office products saw media tablets out in front, at +17%, and inkjet printers at the other end of the scale, at -15%. Smartphones experienced an uptick of 3%.
- While PTV posted a good result of +22%, audio home systems lost 9%. Within MDA/SDA categories, vacuum cleaners was the best-performing product group, at +13%. All others delivered moderate, single-digit growth.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 23 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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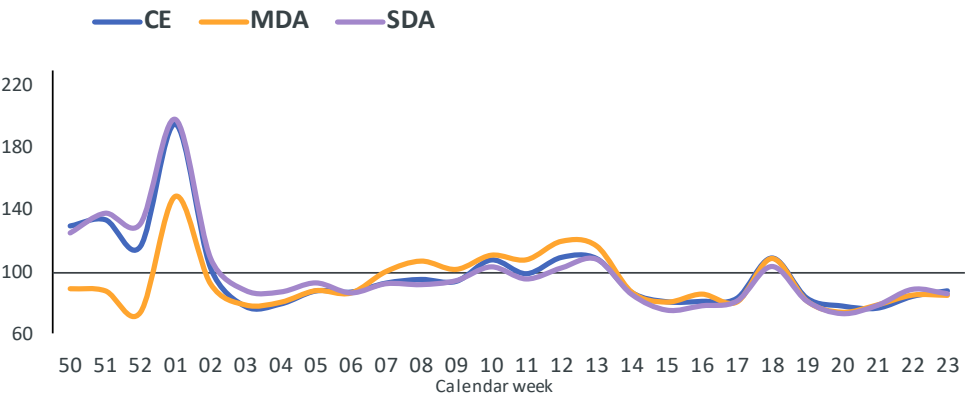
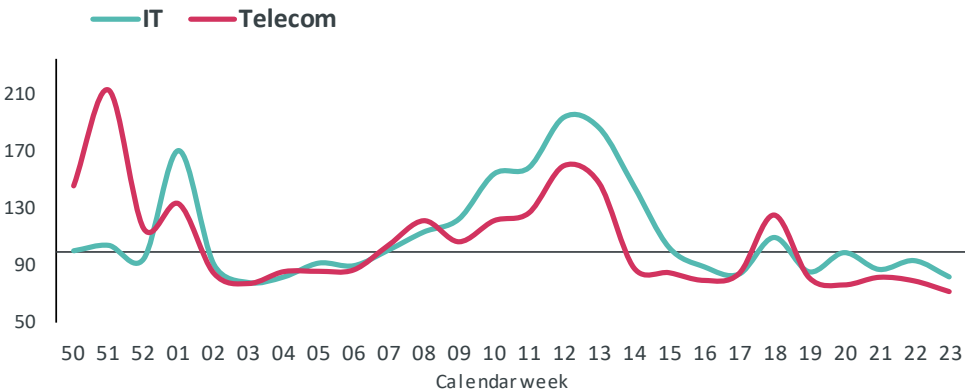
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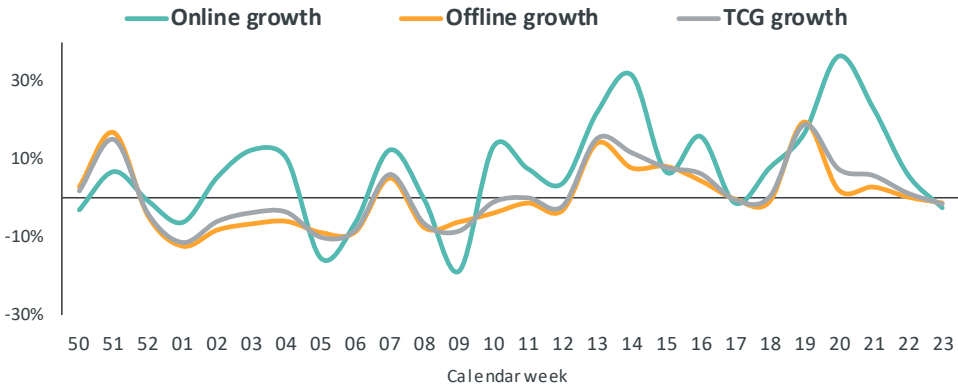
Brazil

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 23 (Jun 03 – Jun 09)



- Close rates of -3% for online sales and -1% for traditional retail led to an average deceleration of 1% for the total TCG market.
- Week 23 brought a good, double-digit development for media tablets (+34%) while mobile computing lagged at -8%. Smartphones were up 12%.
- Air treatment experienced a severe drop of 33%. Vacuum cleaners and shavers were down by just 1% and hot beverage makers were flat. Dental care accelerated by 12%. Within CE categories, headsets won 11% and PTV delivered +3%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 23 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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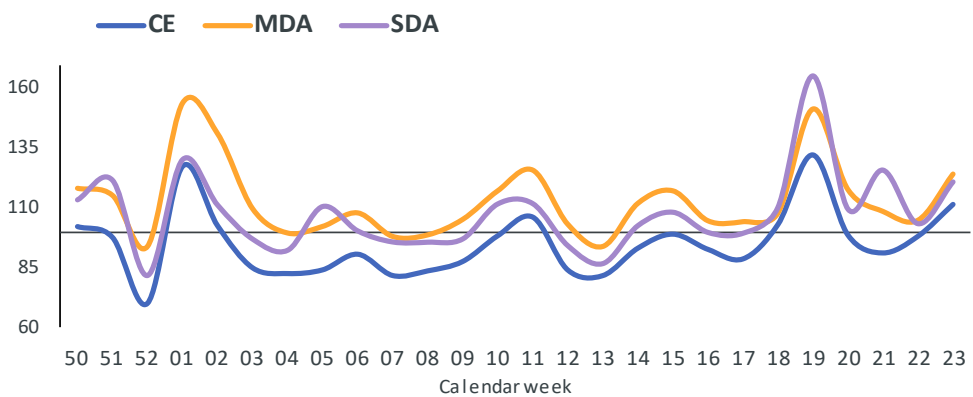
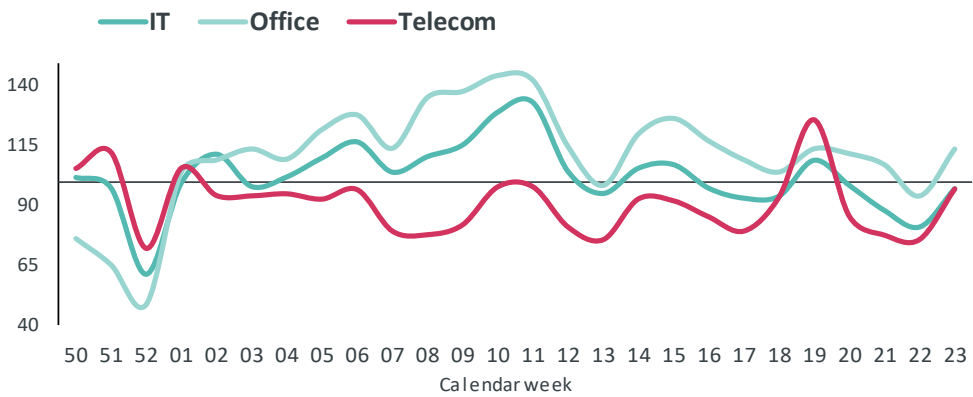
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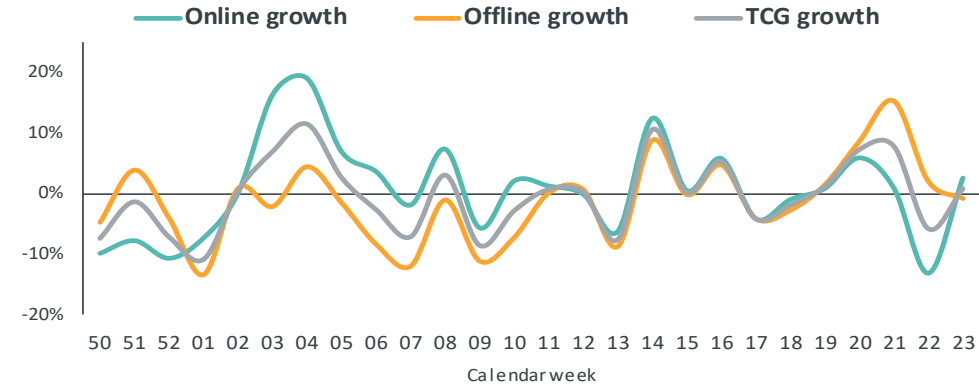
> Brazil

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 23 (Jun 03 – Jun 09)



- Traditional retail delivered -1% but online sales at +3% were able to compensate and left the total TCG market at a slight plus of 1%.
- Laser printers at +50% were the best-performing category in week 23. Desk computing claimed good growth as well, at +38%. Mobile computing posted a negative trend (-2%). Smartphones slumped at -17%.
- All MDA/SDA/CE products delivered growth, with washing machines in the lead at +32%. Vacuum cleaners at 26% claimed second place. Audio home systems at +6% were the least successful.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 23 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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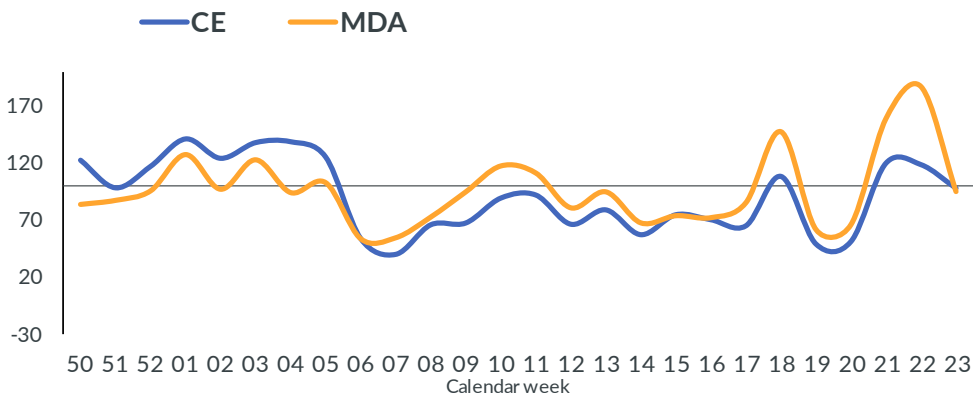
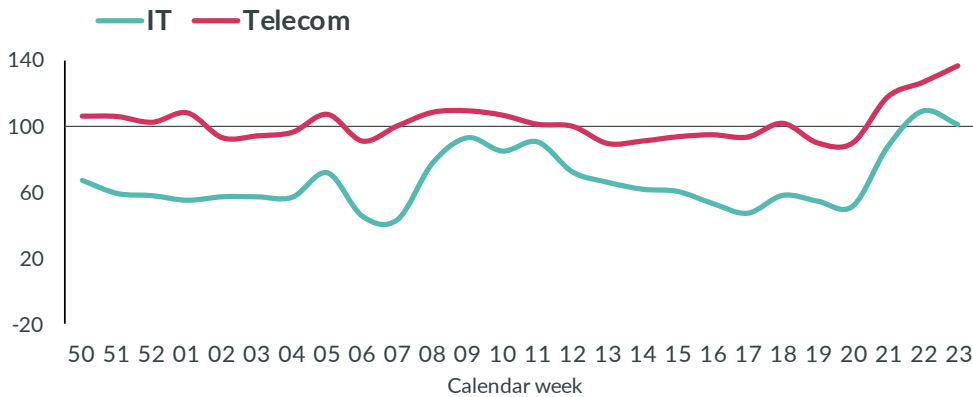
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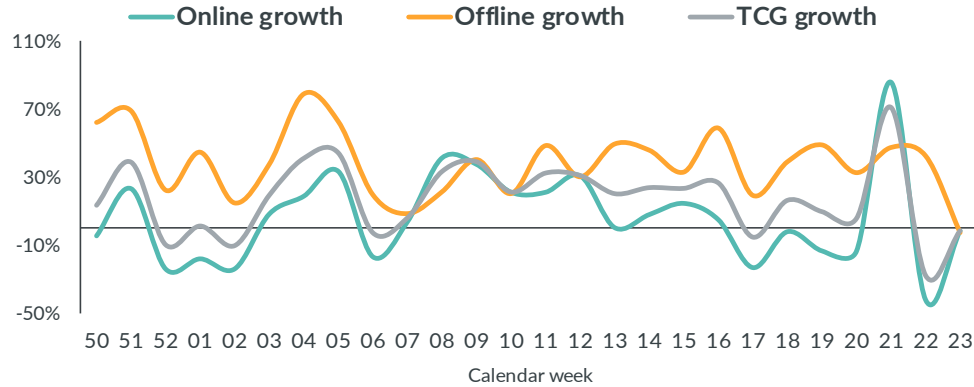
Brazil

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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 23 (Jun 03 – Jun 09)



- Slight deceleration for online sales (-1%) and traditional retail (-2%) delivered a minus of 1% for the total TCG market.
- Cooling and washing machines at -31% and -28% respectively were the drivers of this development. PTV at -5% added to it.
- Due to the high share of smartphones in the product group basket, the strong declines of MDA did not impact the total TCG development much and smartphones rose 4%. Mobile computing at +4% added to it.



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