



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 187
cw01/2024

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Take the effort out of analyzing data

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> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China

Volatility and uncertainty is forecasted to remain throughout 2022 and beyond. It's never been more important to act based on facts, with data-driven decisions being made across the whole organization.

gfknewron builds a single point of truth for business-critical data that's easily accessible, and understandable, by your team. In today's fast-moving, highly competitive landscape, this is crucial to working at speed and turning market disruptions into profitability.

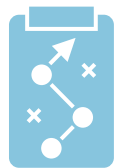
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



Act in seconds to control your future with AI-powered recommendations



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Revolutionize the way you strategize and grow with forecasts and simulations



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Fact of the Week

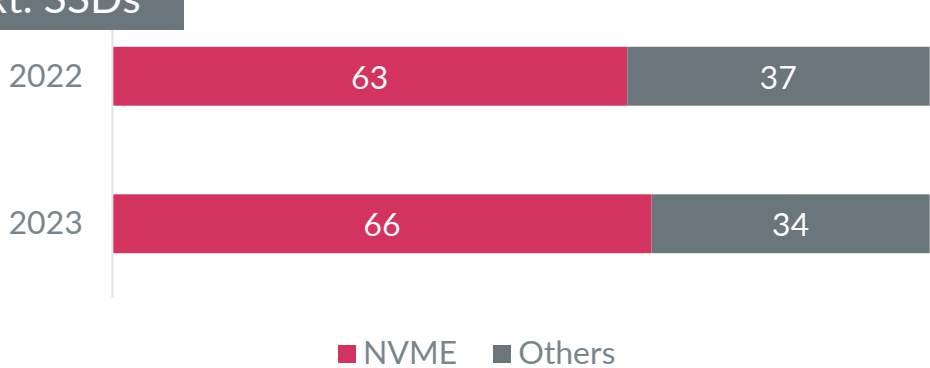
SSDs grew across all regions, driven by decreasing prices and it's all about speed and performance!



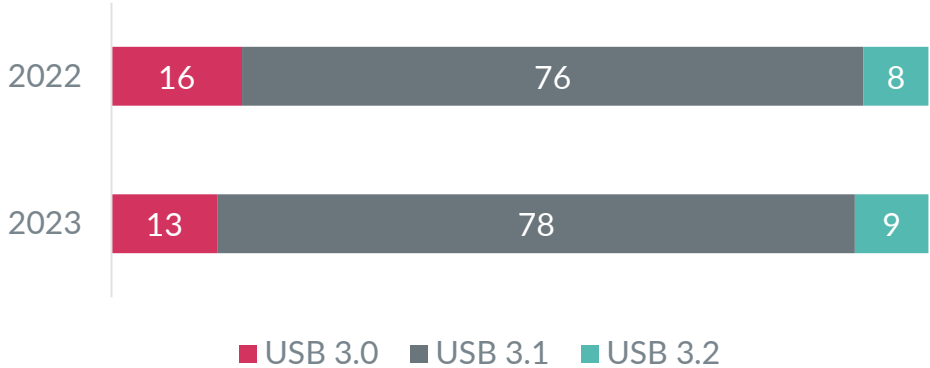
- About **gfknewron**
- > Fact of the week
- Germany
- Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

GfK Panelmarket | Revenue shares in USD | Jan-Aug 2022 vs 2023

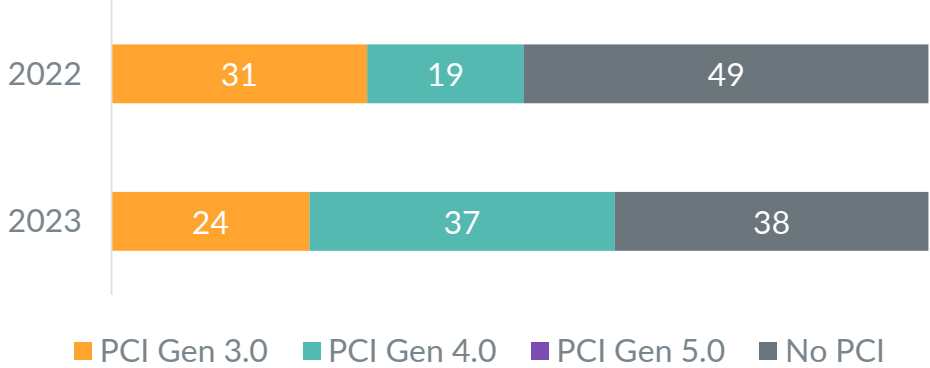
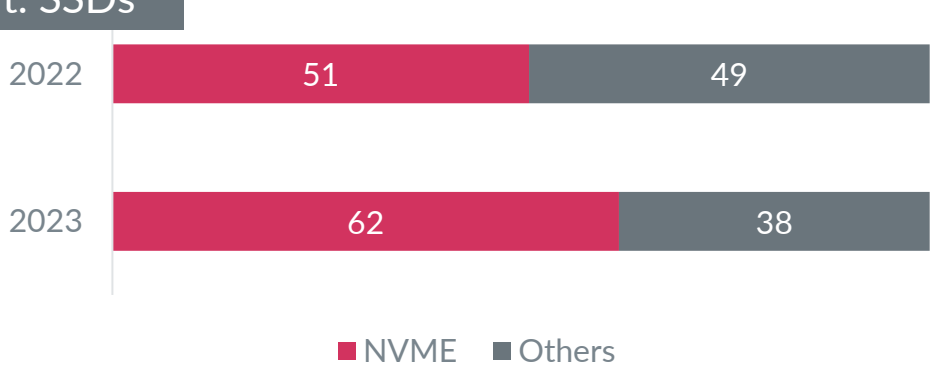
Ext. SSDs



High capacities allow easy usage without concerns about content lost



Int. SSDs



Source: GfK Market Intelligence; Global (excl. NA): Revenue Shares in USD

Weekly retail insights from the Point of Sale

Spotlight on Germany



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).

Please note: Below lines depict the sales growth rate vs same week of previous year.

About **gfknewron**

Fact of the week

> Germany

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Italy

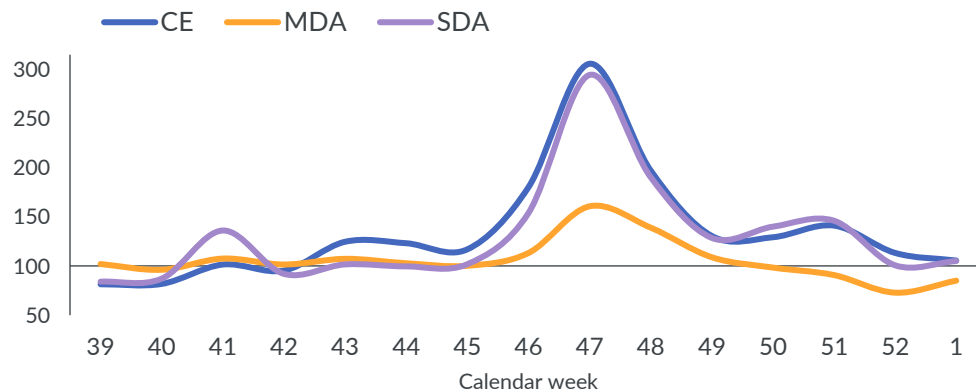
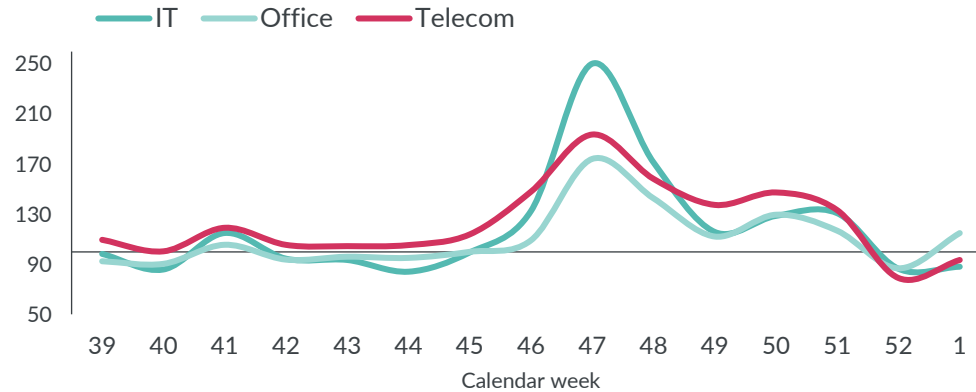
Spain

Japan

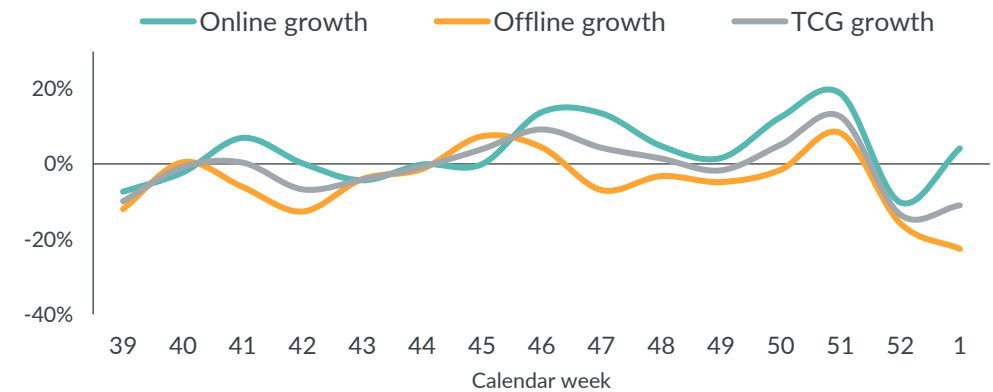
Brazil

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 01 (Jan 01 – Jan 07)



- After good recovery during the Christmas weeks, the total TCG market dropped by 11% in week 1, driven by traditional retail which plummeted by 23%. Online sales were slightly up – by 4%.
- All IT/Office products slumped in double digits, with monitors hit the least at -15%, and desk computing delivering -34%. Smartphones lagged at -3%.
- While MDAs and CE categories performed similarly to IT/Office, there were rays of light in the SDA sector: vacuum cleaners were up 4%, dental care grew by 2%, and air treatment delivered a slight plus of 1%.

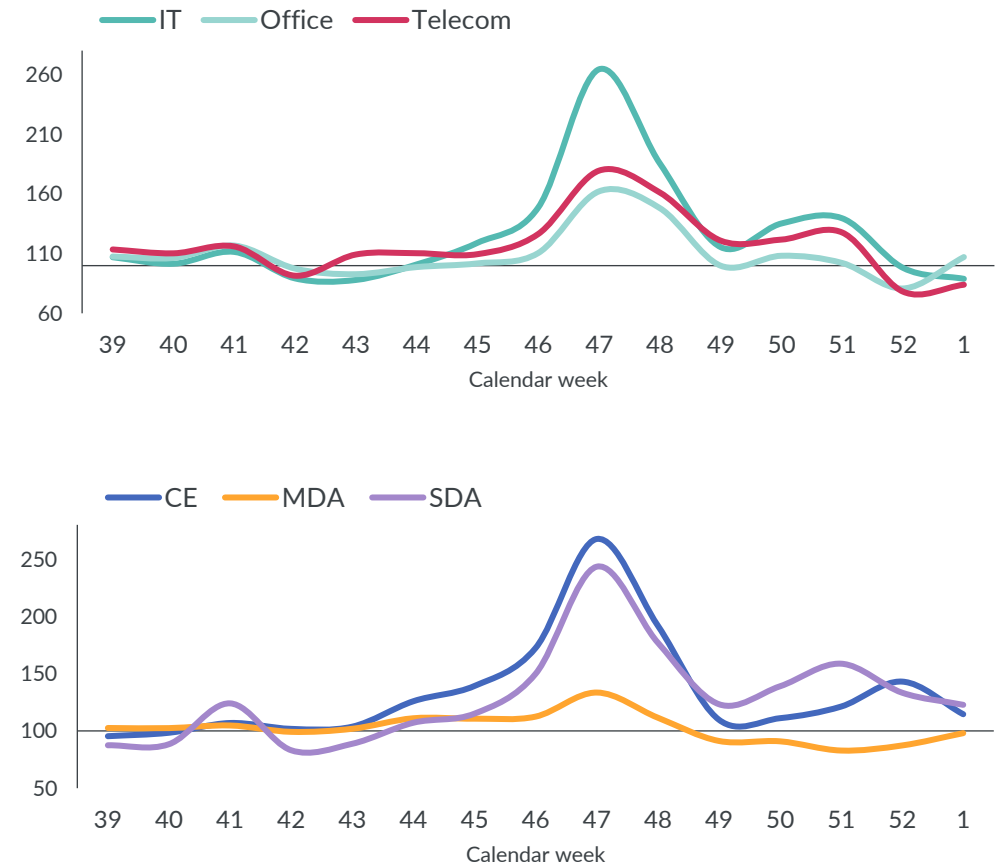
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

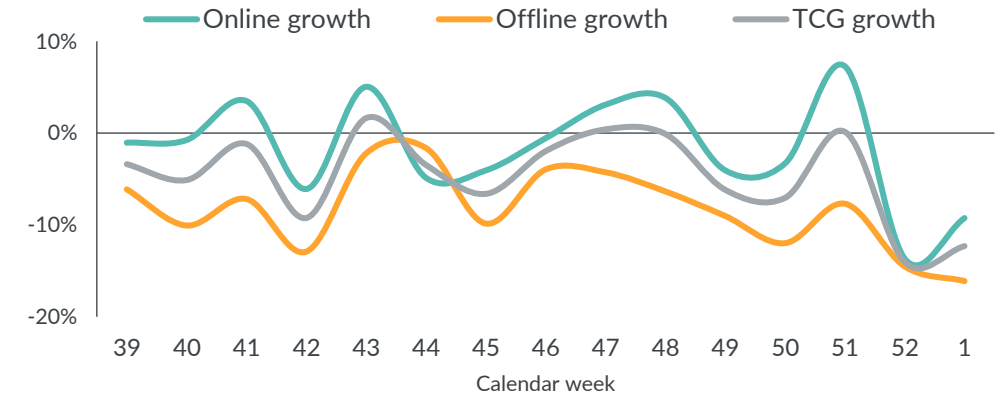


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

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 01 (Jan 01 – Jan 07)



- Deceleration of traditional retail (-16%) dragged the total TCG market down by -12%. Online sales added to it by delivering -9%.
- The main drivers of this development were media tablets at -32% and smartphones – with high sales revenue – at -15%. Peripherals grew, mice at +15% and keyboards at +6%.
- Soundbars at -27% added to the weak result of TCG. TVs declined by 8%. Within MDA/SDA/CE categories, only dental care (+4%) and shavers (+5%) posted positive trends.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 01 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

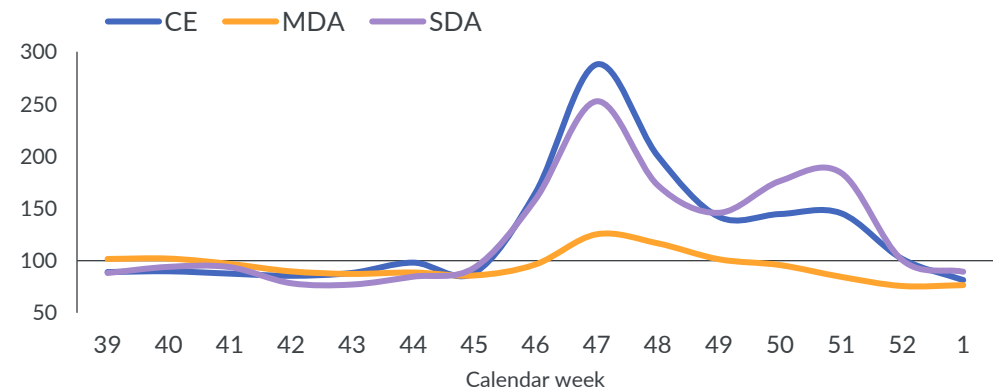
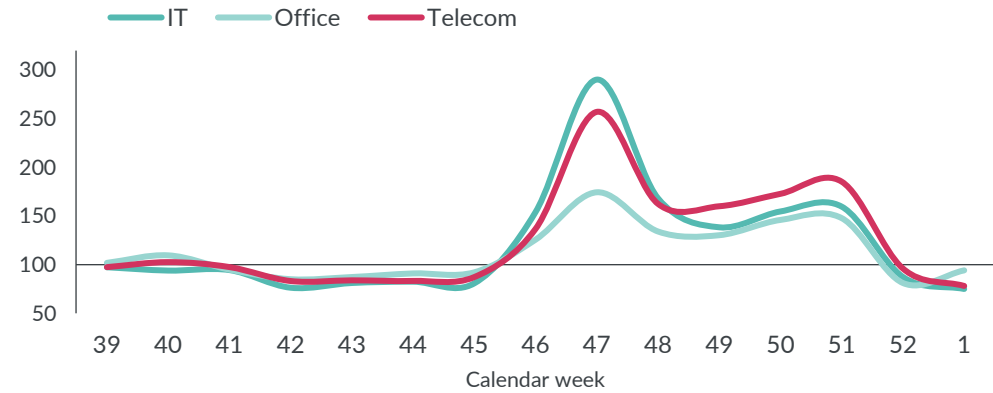
Weekly retail insights from the Point of Sale

Spotlight on France

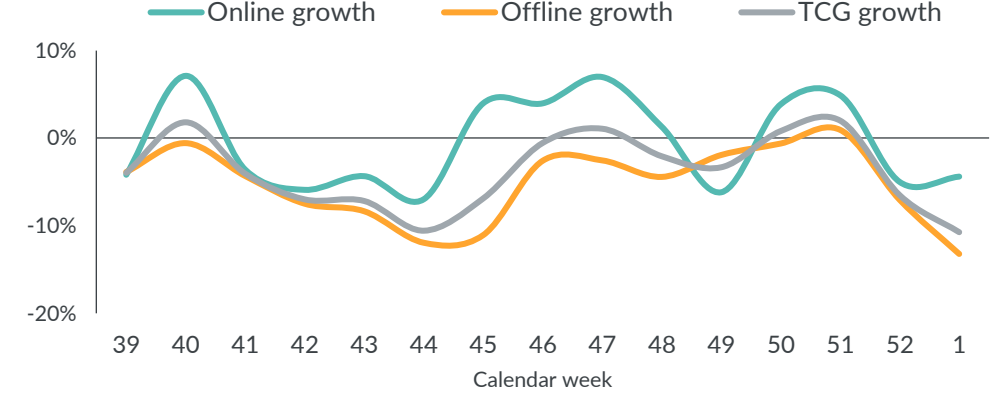


- About **gfknewron**
- Fact of the week
- Germany
- Great Britain
- > France
- Italy
- Spain
- Japan
- Brazil
- China

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 01 (Jan 01 – Jan 07)



- Online sales delivered -4% and traditional retail was down 13%, resulting in a drop of 11% for the total TCG market.
- Laser printers were the worst-performing product group in week 1, and media tablets claimed second place at -30%. Peripherals made slight increases and monitors gained ground at +18%. Smartphones lagged at -10%.
- MDA/SDA/CE products posted double-digit negative trends (soundbars at -26%), except for washing machines at -6%, shavers at -7% and air treatment at -1%. Vacuum cleaners grew by a tiny plus of 1%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 01 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



About **gfknewron**

Fact of the week

Germany

Great Britain

France



Italy

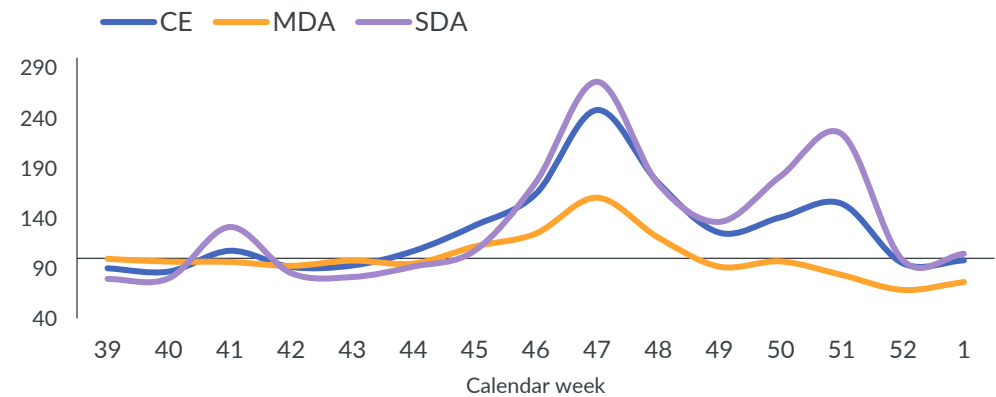
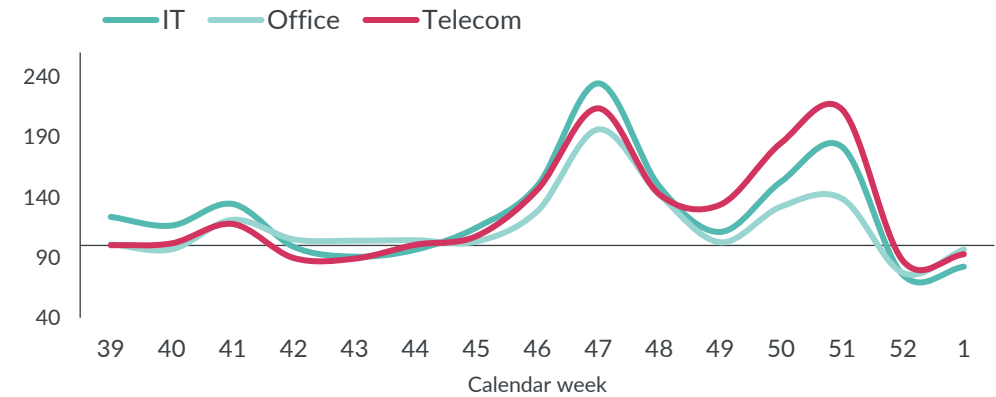
Spain

Japan

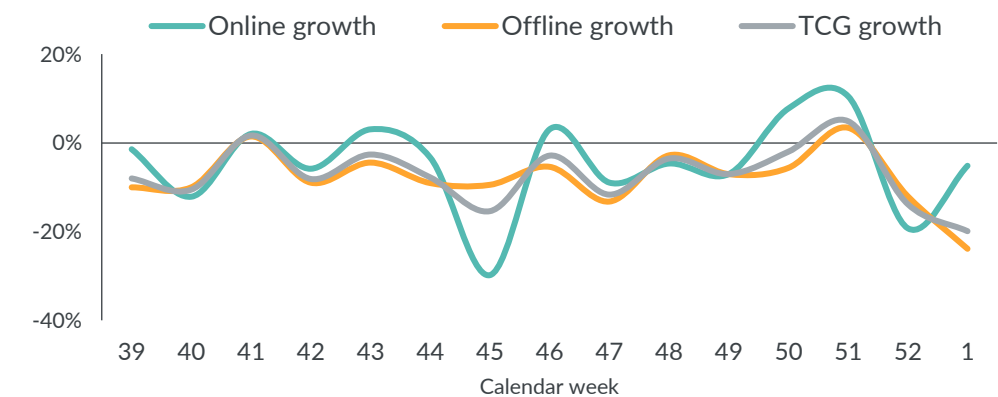
Brazil

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 01 (Jan 01 – Jan 07)



- Deceleration of traditional retail (-24%) dragged the total TCG market down by -20%. Online sales added to it by delivering -5%.
- All IT/Office and telecom products lost in solid double-digits, ranging from -14% for smartphones to -41% for laser printers.
- The same applied to MDA/SDA/CE categories except for hot beverage makers at -2% and vacuum cleaners at -9%. The worst-performing product group in week 1 was air treatment at -45%. TV sales declined by 34%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 01 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

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France

Italy

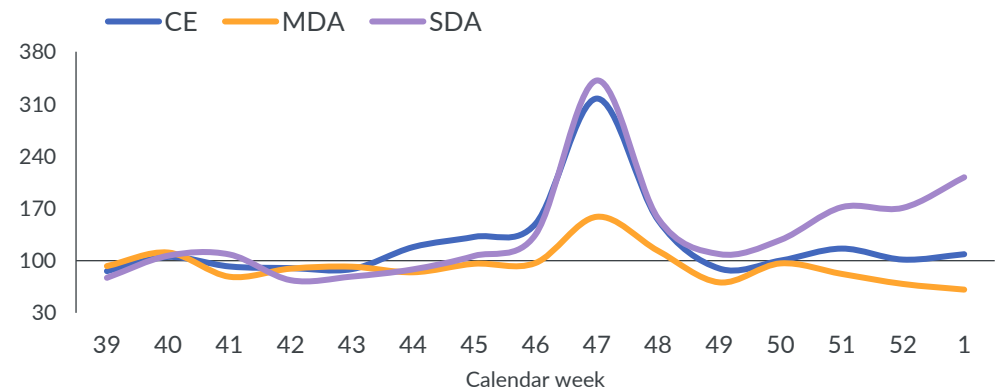
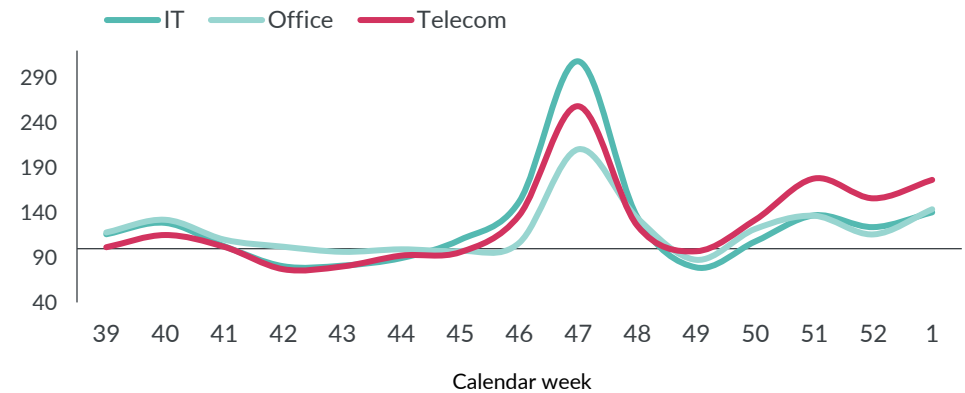
➤ Spain

Japan

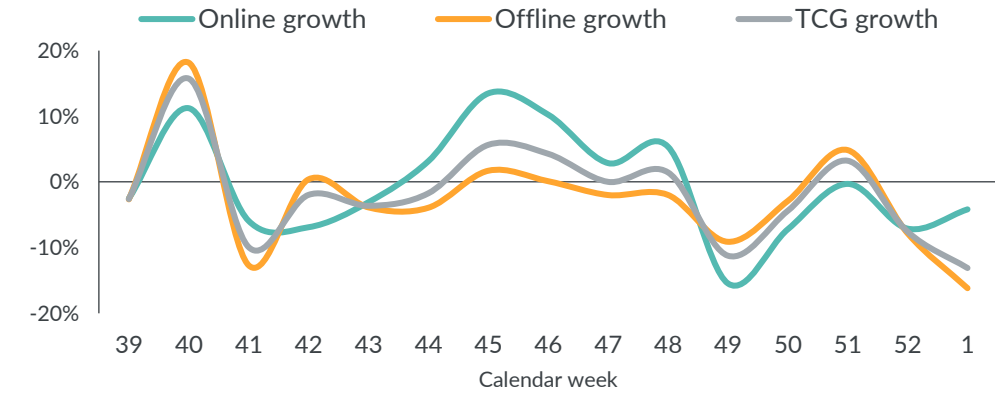
Brazil

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 01 (Jan 01 – Jan 07)



- Traditional retail experienced a minus of 16% versus week 1 in 2023. Online sales at -4% added to the decline of the total TCG market (-13%).
- Media tablets decreased by 16%, but all other IT/Office categories lost more than 20%. Smartphones and headsets were less negative and fell by 7%.
- CE products were hit strongly, all delivering double-digit negative rates, with audio home systems in the lead at -41% and TVs posting -22%. MDA/SDA was less negative, with hot beverage makers in pole position at +4%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 01 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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Fact of the week

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France

Italy

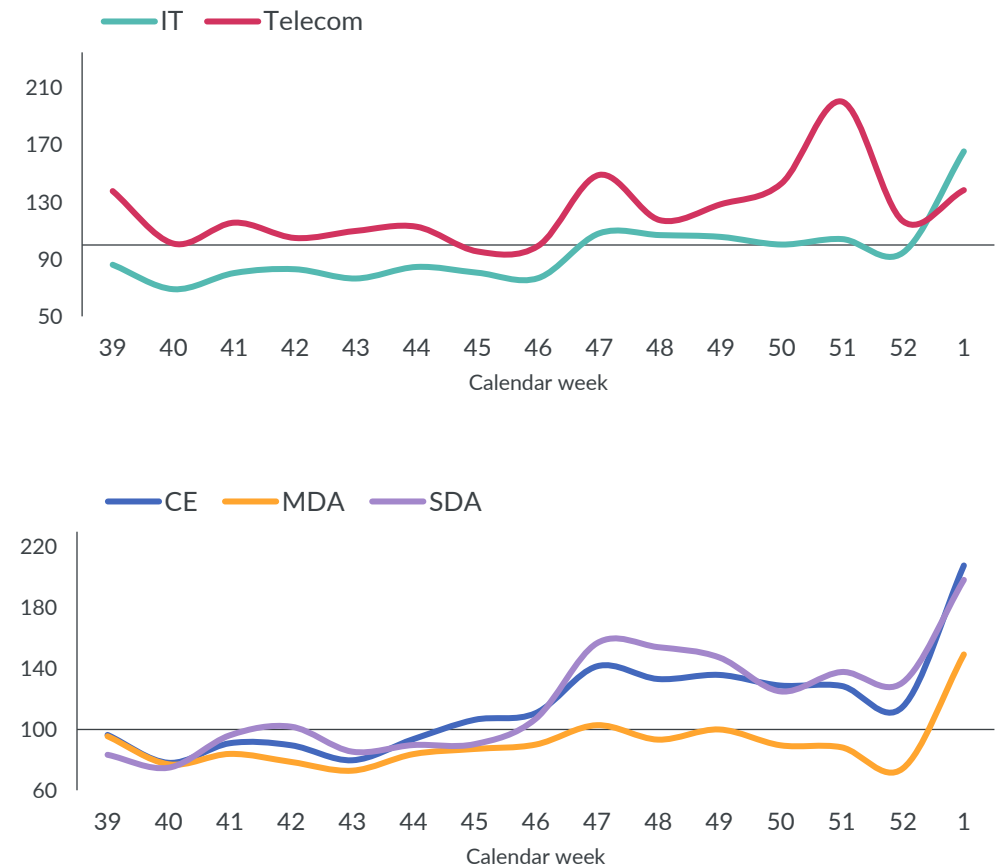
Spain

> Japan

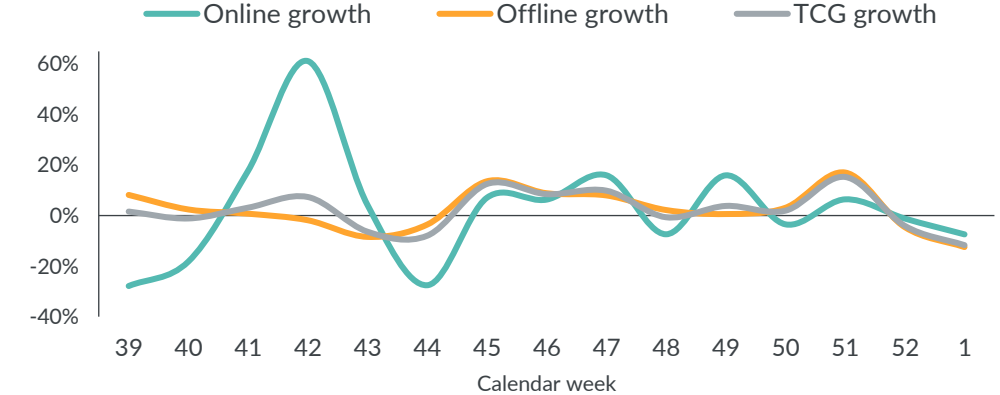
Brazil

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 01 (Jan 01 – Jan 07)



- Online sales delivered -7% but due to its small share compared with traditional sales which lost 12%, the online result could not impact the decline of 12% for the total TCG market.
- Mobile computing decelerated at -28% while media tablets grew by 5%. Smartphones slumped at -21% and headsets lagged at -3%.
- Mixed trends for SDA products saw dental care in the lead at +28% and air treatment last at -33%. MDAs lost moderately, at 9%. In CE, soundbars were the worst-performing category at -22%. TVs were down by 3%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 01 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

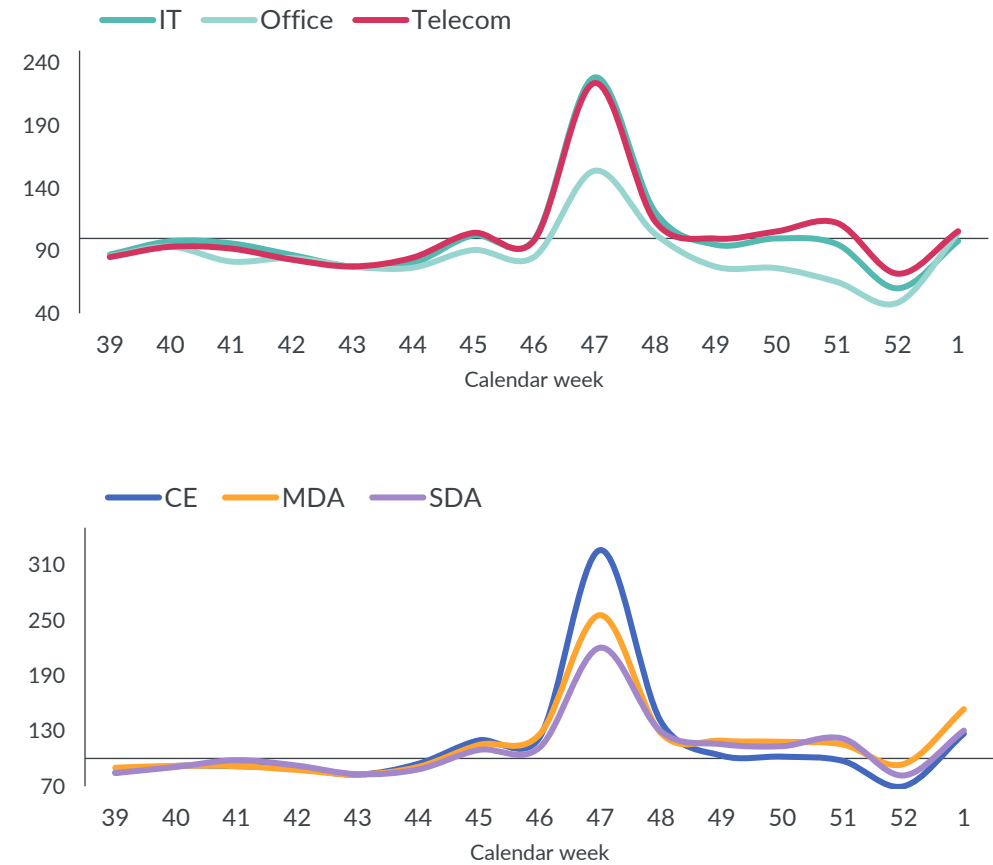
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Japan

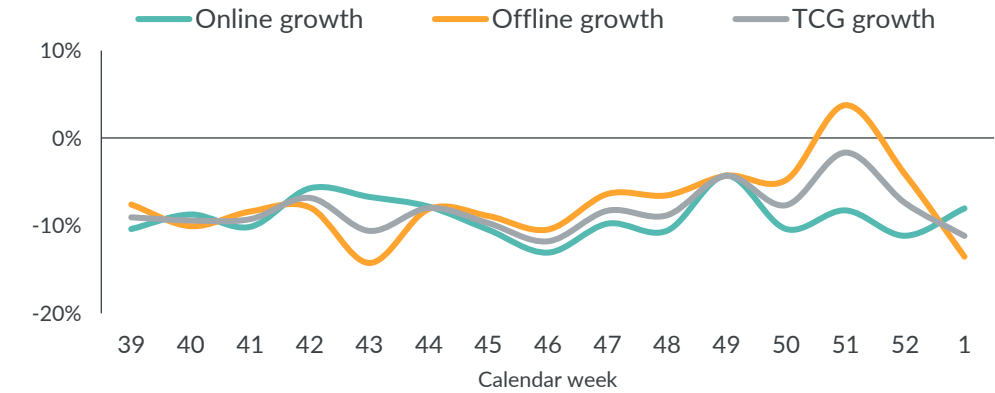
➤ Brazil

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 01 (Jan 01 – Jan 07)



- Online sales delivered -14% and with traditional retail down -8%, the result was a downswing for the total TCG market of 11%.
- Media tablets at +45% were the best-performing category in week 1, while all other IT/Office categories posted negative trends, with desk computing delivering -21%. Smartphones slumped at -23%.
- Among MDA/SDA/CE products only vacuum cleaners (+18%) and cooling (+12%) delivered growth. At -30%, audio home systems were the worst-performing category in week 1.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 01 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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Fact of the week

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France

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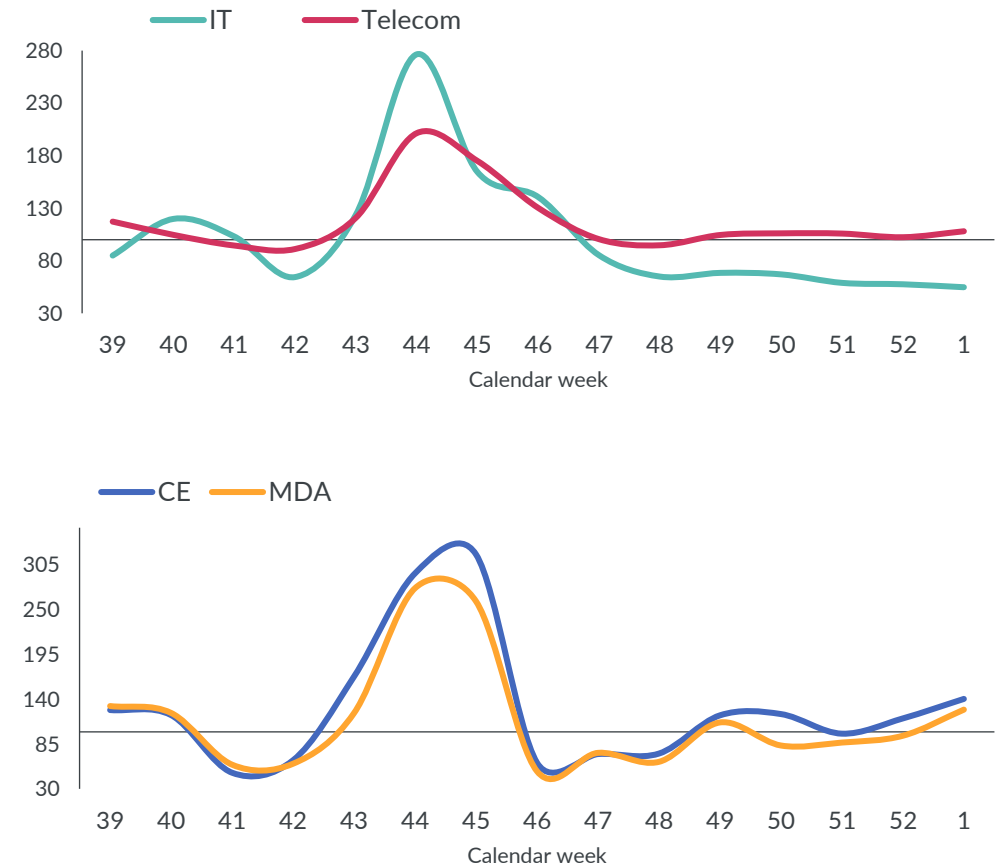
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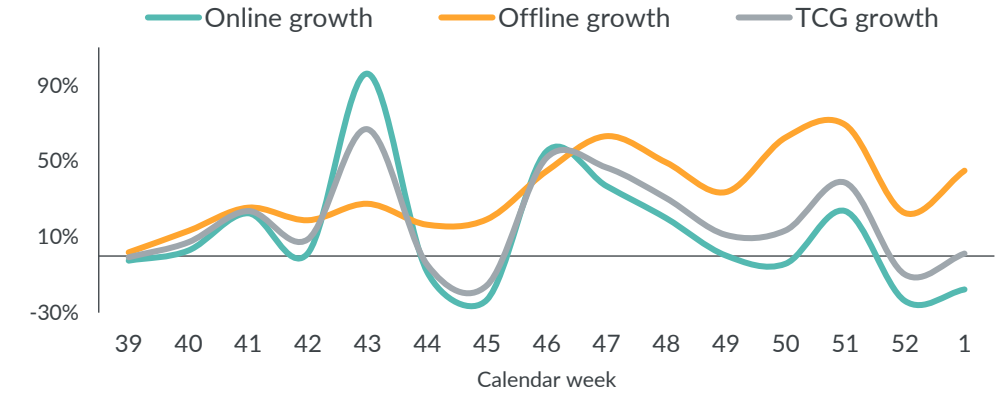
Brazil

➤ 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 01 (Jan 01 – Jan 07)



- Opposing development of traditional retail at +45% and online sales at -18% led to a small uptick for the total TCG market of 1%.
- Smartphones were the driving force of this development due to their high share in the product group basket - although the growth rate of 6% is not eye-catching. Mobile computing delivered a minus of 22%.
- Week 1 in 2024 saw decreases for washing machines (-6%) and cooling (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.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 01 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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