



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 188
cw02/2024

Powered by **gfknewron**



Take the effort out of analyzing data

Get quick, easy and comprehensive access to your business intelligence



> 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.

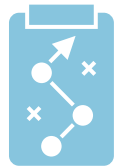
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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



Outperform expectations and give decision-makers data at their fingertips



Revolutionize the way you strategize and grow with forecasts and simulations



- Unlock the complete picture of your performance at a glance, with **gfknewron Market**
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- Win the market with the help of AI prescriptive knowledge, with **gfknewron Predict**



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Fact of the Week

Home appliances and entertainment drive sales on Black Friday!



About **gfknewron**

Black Friday week 2023 vs average week (EUR sales growth)

> Fact of the week

Germany

Great Britain

France

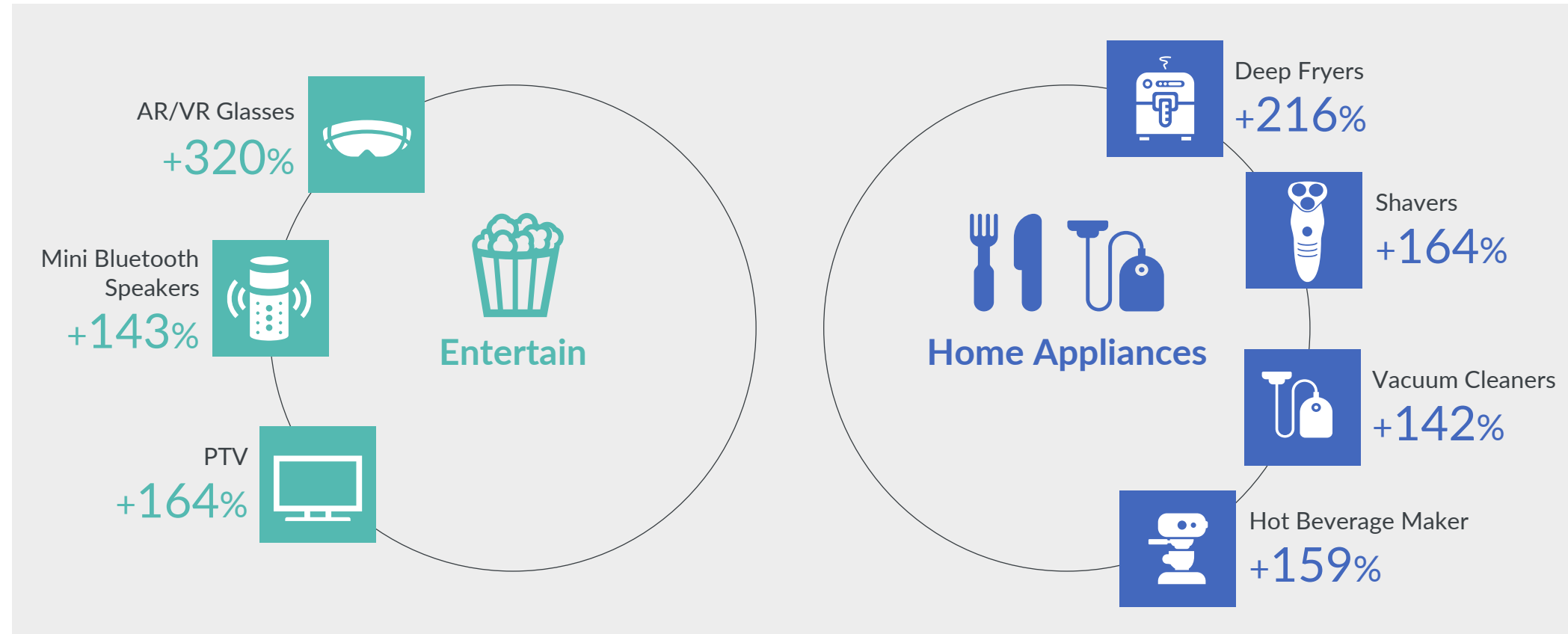
Italy

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Weekly retail insights from the Point of Sale

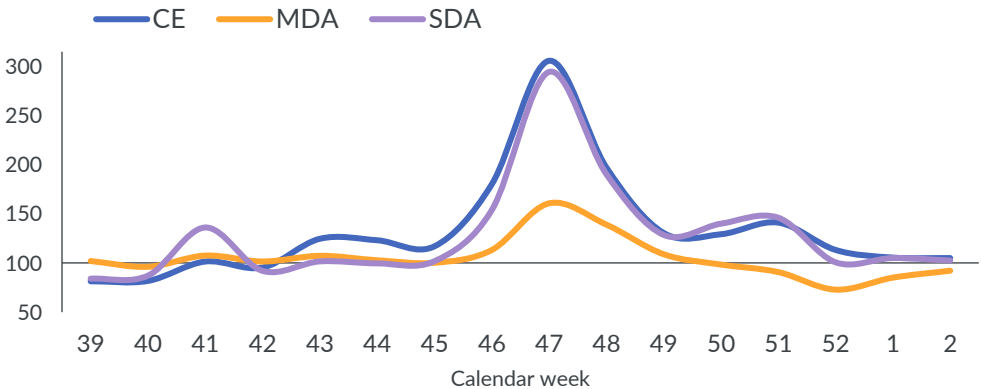
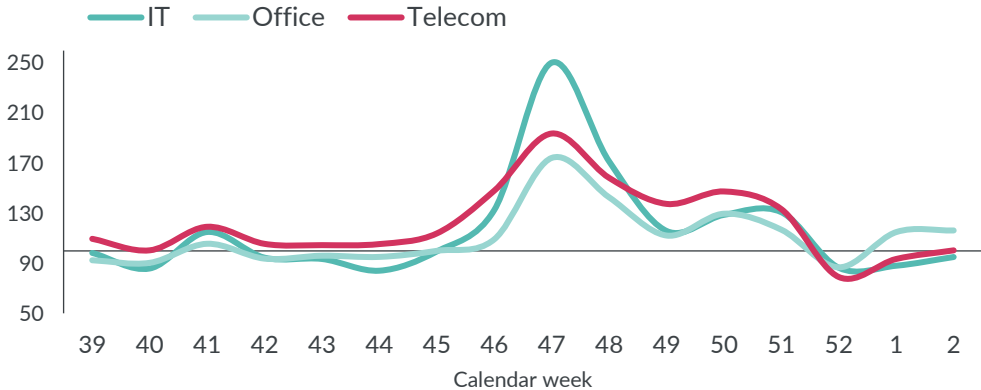
Spotlight on Germany



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

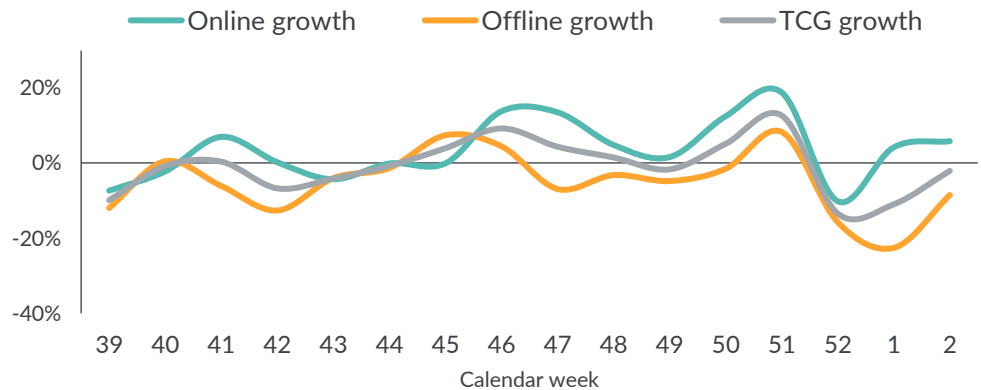
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 02 (Jan 08 – Jan 14)



- The total TCG market dropped by a slight 2% in week 2, driven by traditional retail which declined by 9%. Online sales at +6% was not able to balance that out.
- Except for monitors at -2%, all other IT/Office products slumped in double digits between -11% for laser printers and -18% for mobile computing and desk computers. Smartphones grew by 3%.
- The mixed picture for SDA showed +32% for air treatment on one hand and -5% for shavers on the other hand. MDAs posted negative trends. Soundbars delivered an eye-catching loss of 33%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 02 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.

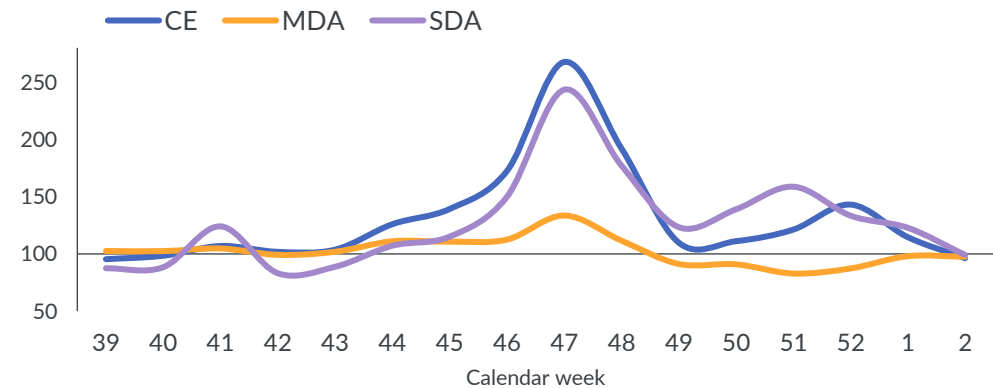
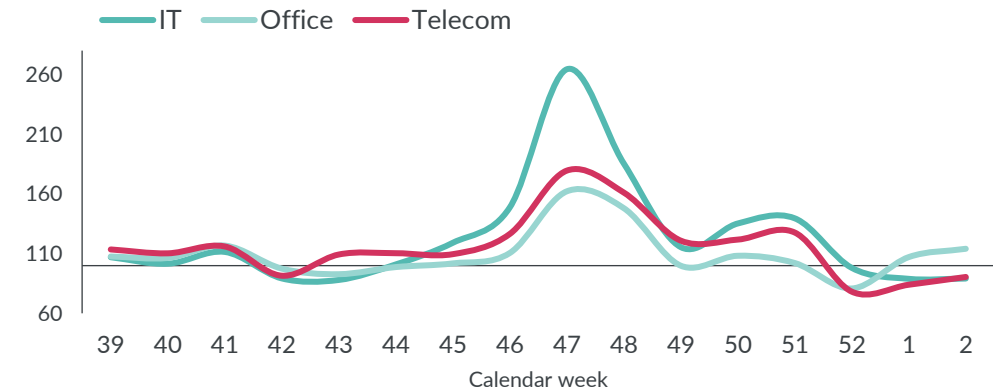
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

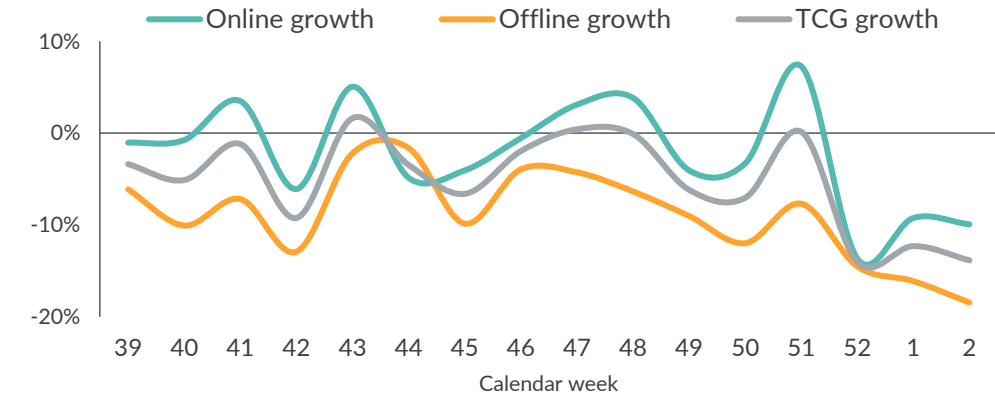


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

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 02 (Jan 08 – Jan 14)



- Deceleration of traditional retail (-18%) dragged the total TCG market down by -14%. Online sales added to it by delivering -10%.
- The main drivers of this development were media tablets at -35% and smartphones – with high sales revenue – at -21%. Peripherals grew, mice at +15% and keyboards at +6%. Monitors were up 7%.
- Soundbars at -18% added to the weak result of TCG. TVs declined by 5%. Within MDA/SDA/CE categories, only food preparation (+5%) posted a positive trend. Dental care and washing machines were flat.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 02 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

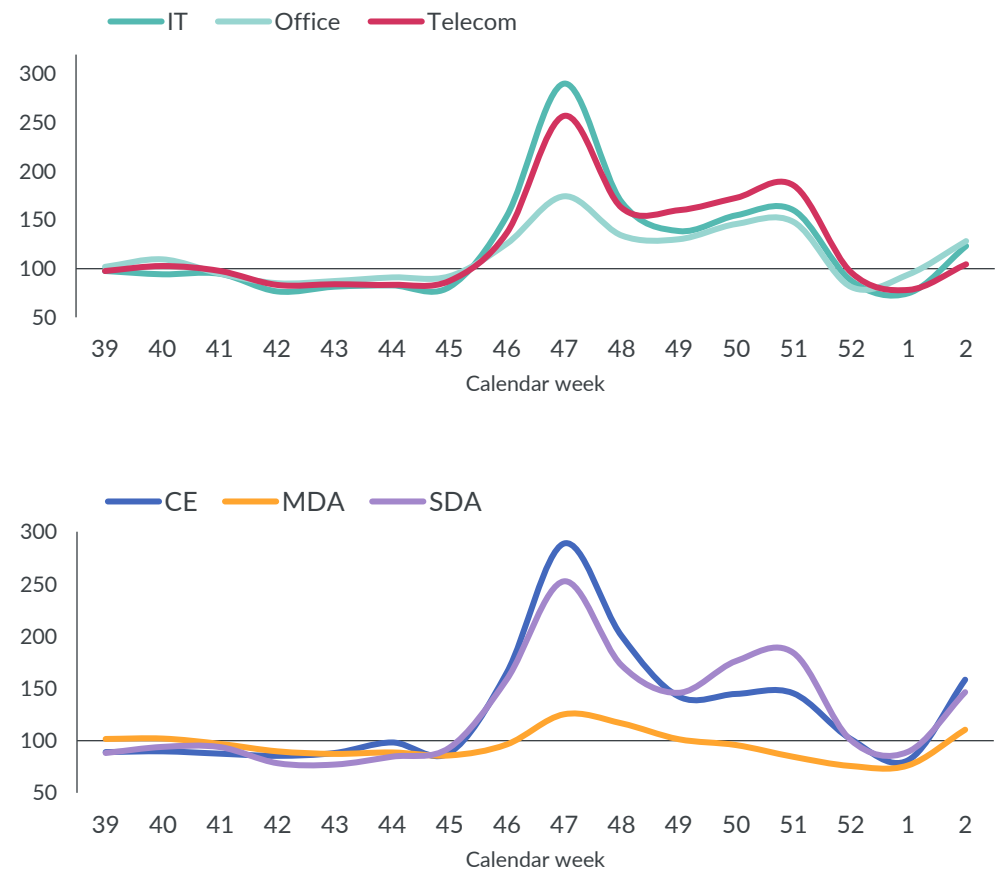
Weekly retail insights from the Point of Sale

Spotlight on France

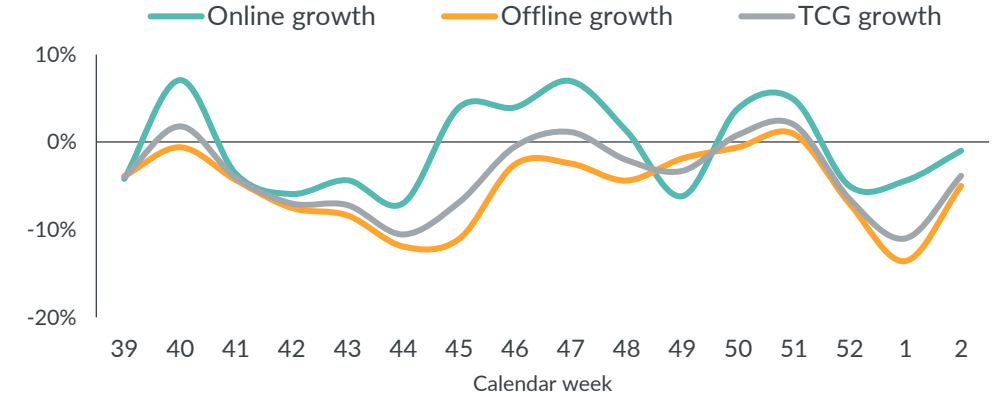


- About **gfknewron**
- Fact of the week
- Germany
- Great Britain
- > France**
- Italy
- Spain
- Japan
- Brazil
- China

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 02 (Jan 08 – Jan 14)



- Online sales delivered -1% and traditional retail was down 5%, resulting in a drop of 4% for the total TCG market.
- Media tablets at -22% were the worst-performing product group in week 2, and laser printers claimed second place at -17%. Peripherals made slight increases and monitors gained ground at +88%. Smartphones lagged at -11%.
- CE products declined. While audio home systems led the negative scores at -22%, TVs dropped by 6%. Within SDA categories, only food preparation (-10%) and hot beverage makers (-2%) lagged. Air treatment delivered a good result (+37%). Dental care (+142%) was boosted by promotions.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 02 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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Fact of the week

Germany

Great Britain

France



Italy

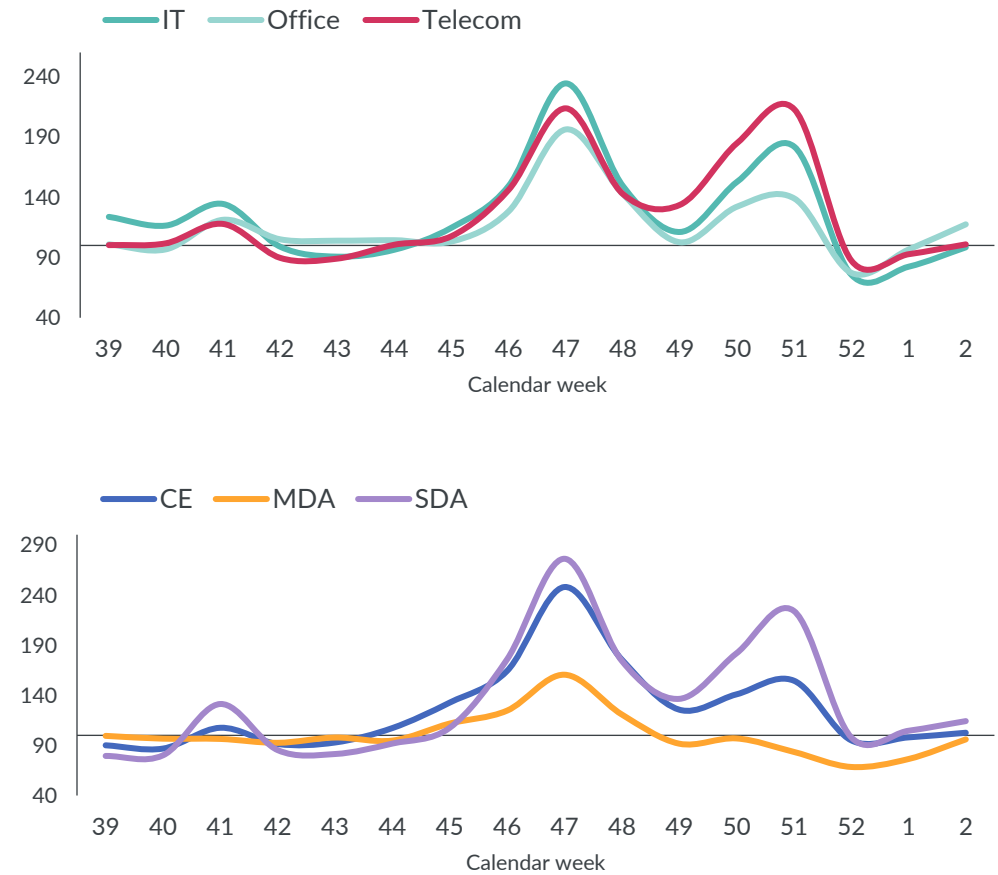
Spain

Japan

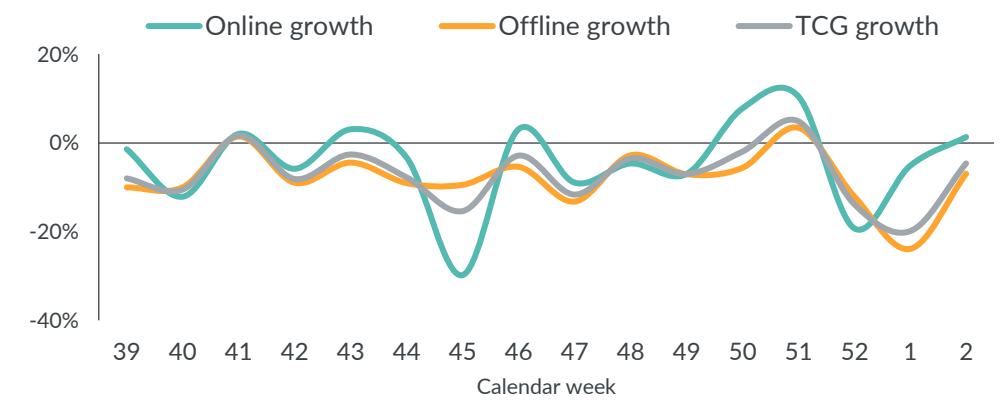
Brazil

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 02 (Jan 08 – Jan 14)



- Deceleration of traditional retail (-7%) dragged the total TCG market down by -5%. Online sales at +1% was not able to balance that out.
- Except for media tablets at +6%, all other IT/Office products lost in double-digits, ranging from -12% for mobile computing to -19% for desk computing and inkjet printers. Smartphones experienced a slight uptick of 1%.
- Similar applied to CE categories with TVs posting -20%. MDAs were less negative, declining by 3% for washing machines and -5% for cooling. SDAs showed a mixed picture with -23% for air treatment and +9% for hot beverage makers.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 02 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

Weekly retail insights from the Point of Sale

Spotlight on Spain



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Fact of the week

Germany

Great Britain

France

Italy

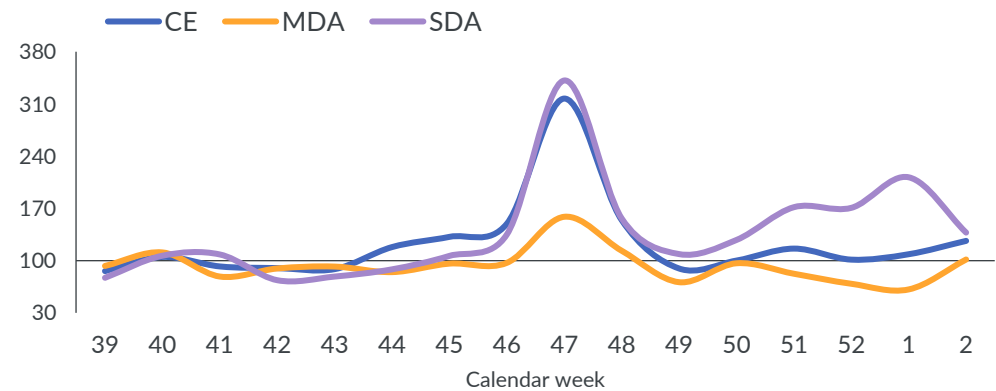
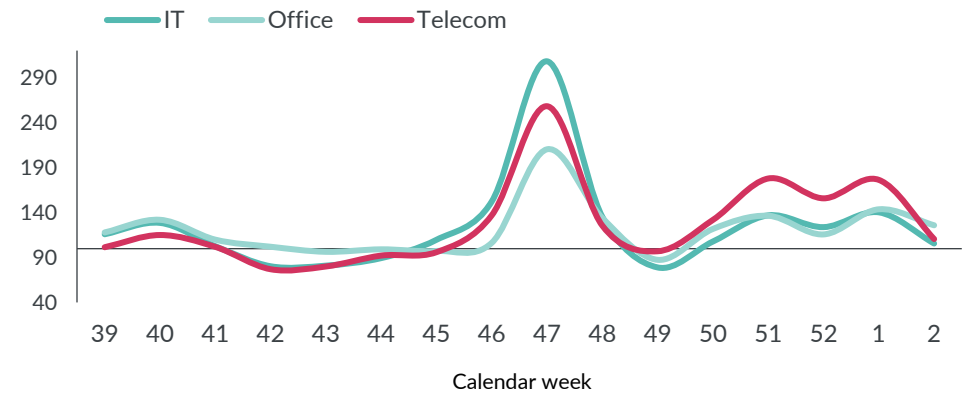
➤ Spain

Japan

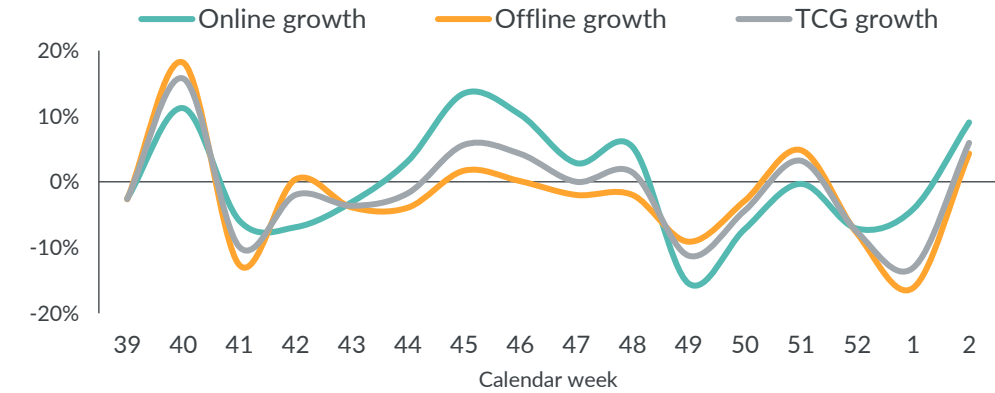
Brazil

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 02 (Jan 08 – Jan 14)



- Online sales experienced a plus of 9%. Added to +4% for traditional retail, the total TCG market finally registered growth of 6%.
- Week 2 showed a good development for smartphones (+16%) and headsets (+17%). Except for media tablets (+6%), IT/Office products posted negative trends with laser printers out in front at -18%.
- While audio home systems (-20%) were the worst-performing category in week 2, TV sales gained +7%. Washing machines declined by 2% and cooling was down 4%. SDA categories performed well, ranging from +26% for hot beverage makers to +1% for shavers.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 02 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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Great Britain

France

Italy

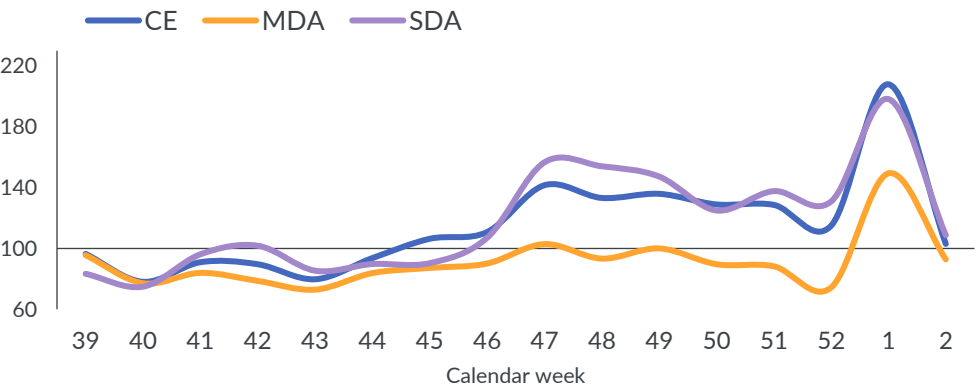
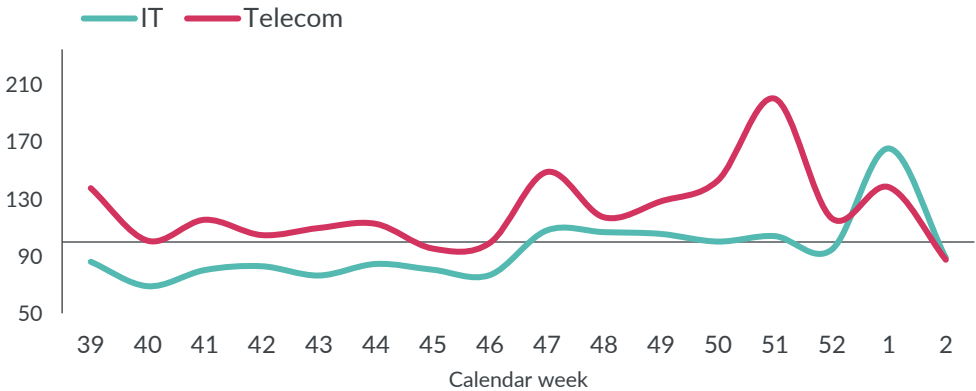
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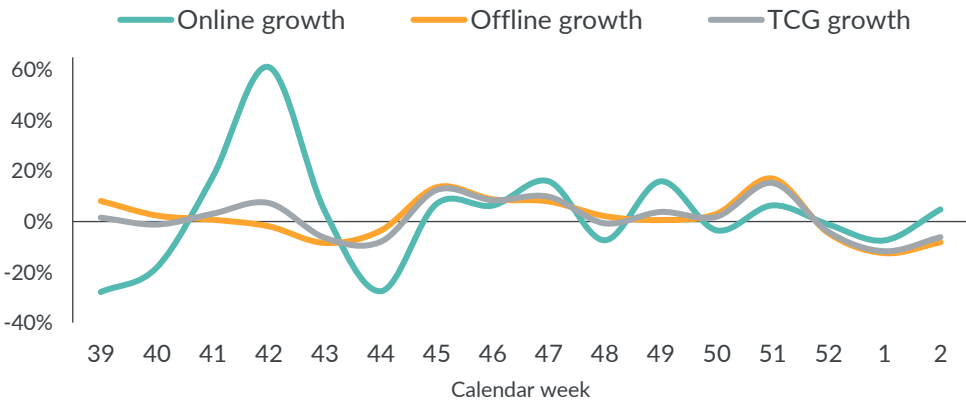
Brazil

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 02 (Jan 08 – Jan 14)



- Online sales delivered +5% but due to its small share compared with traditional sales which lost 8%, the online result could not impact the decline of 6% for the total TCG market.
- Mobile computing decelerated at -24% and media tablets lost 13%. While headsets gained 6%, smartphones slumped at -13%.
- Mixed trends for SDA products saw dental care in the lead at +20% and air treatment last at -15%. MDAs lost moderately, at 3%. In CE, soundbars were the worst-performing category at -21%. TVs experienced an uptick of 1%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 02 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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Fact of the week

Germany

Great Britain

France

Italy

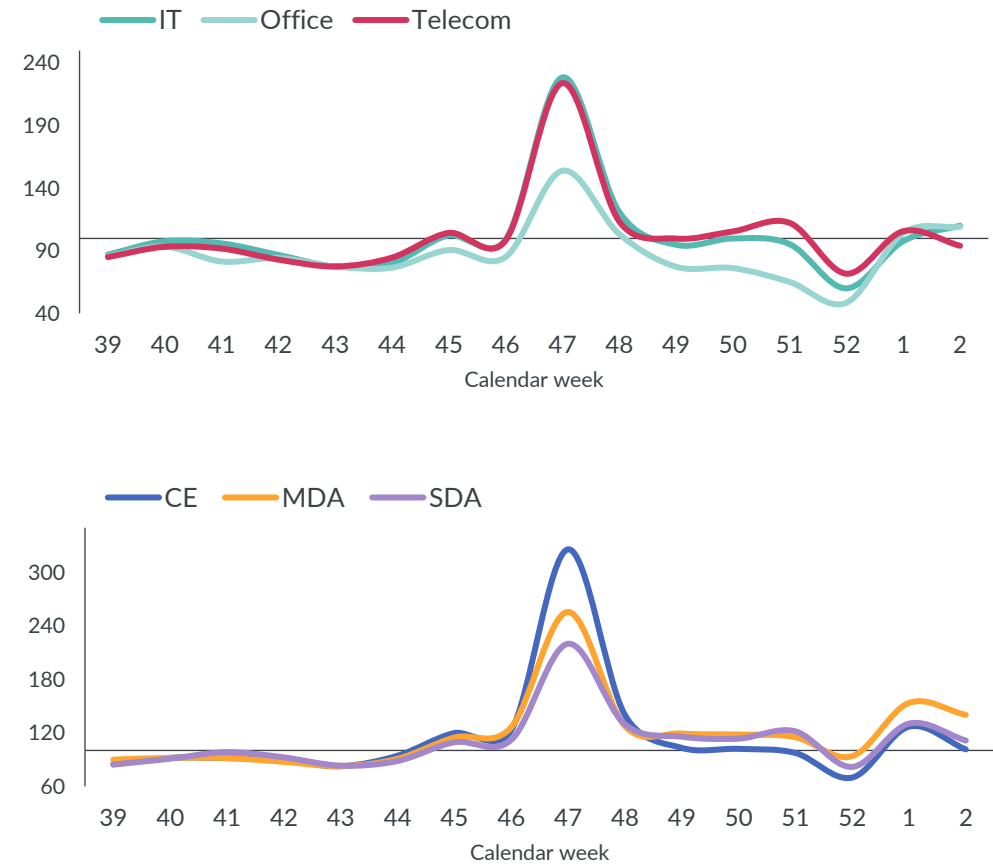
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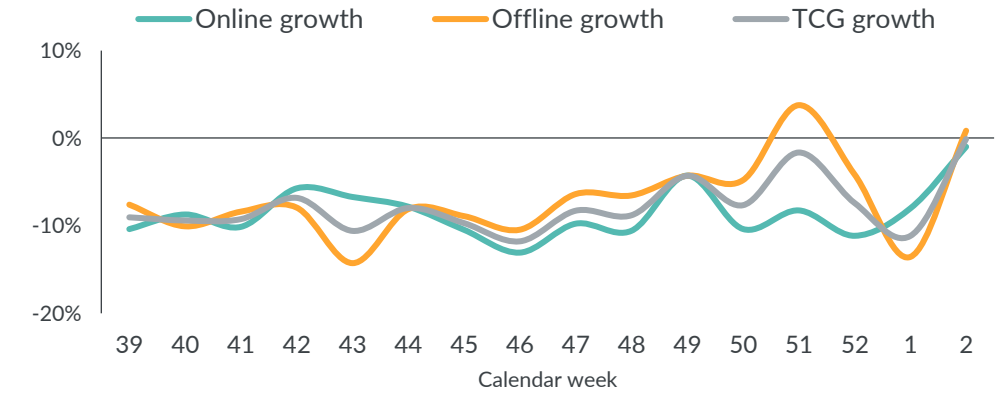
➤ Brazil

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 02 (Jan 08 – Jan 14)



- Online sales (-1%) and traditional retail (+1%) delivered an opposing development to each other, which resulted in a flat total TCG market.
- Media tablets at +63% were the best-performing category in week 2, while all other IT/Office categories posted slight ups and downs. Smartphones slumped at -14%.
- Among MDA/SDA products only shavers at -3% delivered a moderate negative trend. Cooling enjoyed growth of 33%. TV sales lagged at -1% and audio home systems slumped at -14%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 02 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

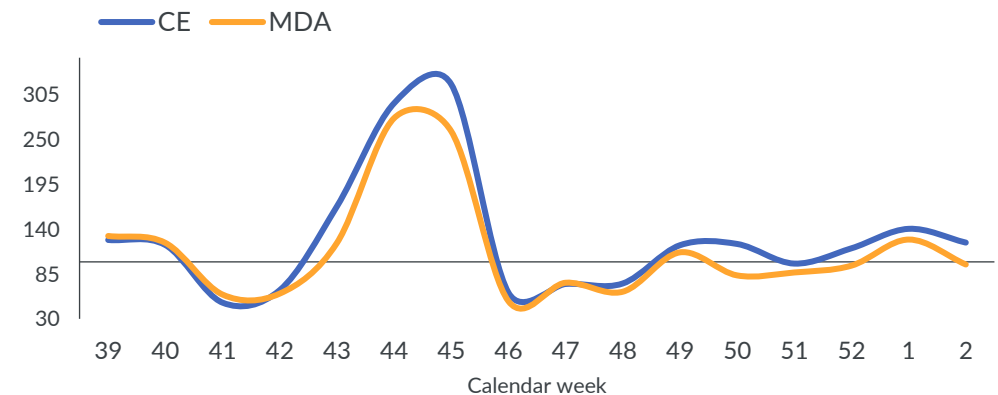
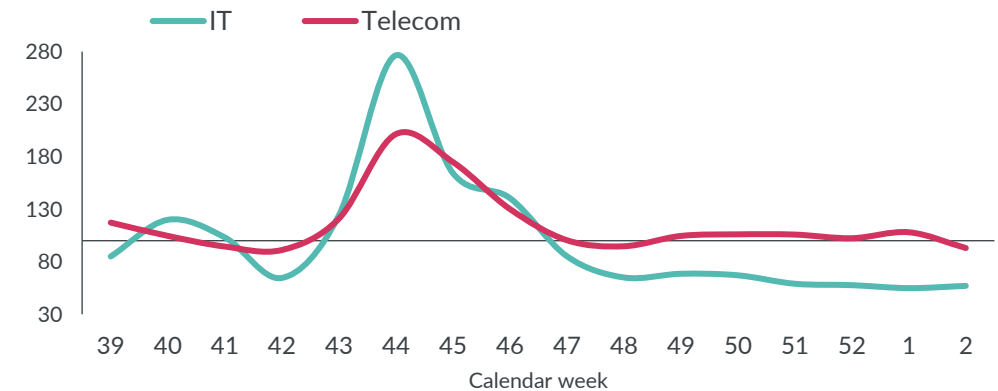
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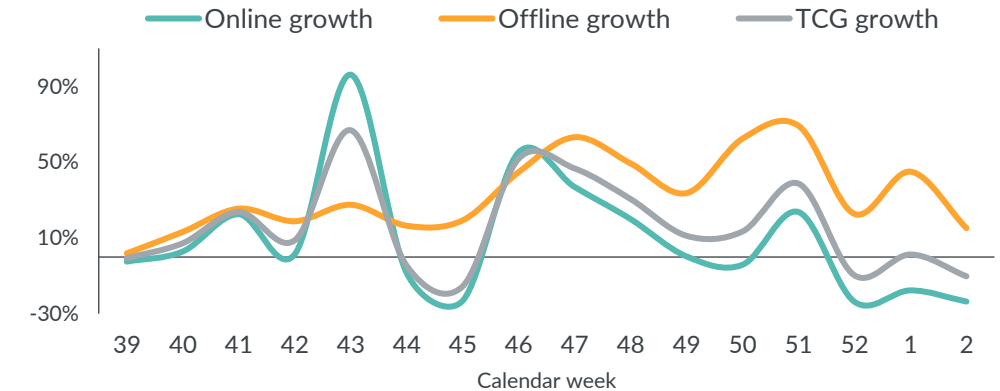
Brazil

➤ 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 02 (Jan 08 – Jan 14)



- Traditional retail experienced a plus of 15% vs week 2 in 2023, but this failed to compensate for the losses of online sales (-24%) and left the total TCG at a minus of 10%.
- Except for smartphones at -6%, all other product groups lost in solid double-digits, ranging from -42% for TVs to -14% for washing machines. Cooling and mobile computing experienced negative trends of -20% and -21% respectively.



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