



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 189
cw03/2024

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> About **gfknewron**

Fact of the week

Germany

Great Britain

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Italy

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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.

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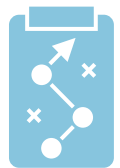
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Foldable smartphones increased presence and potential in premium smartphone market



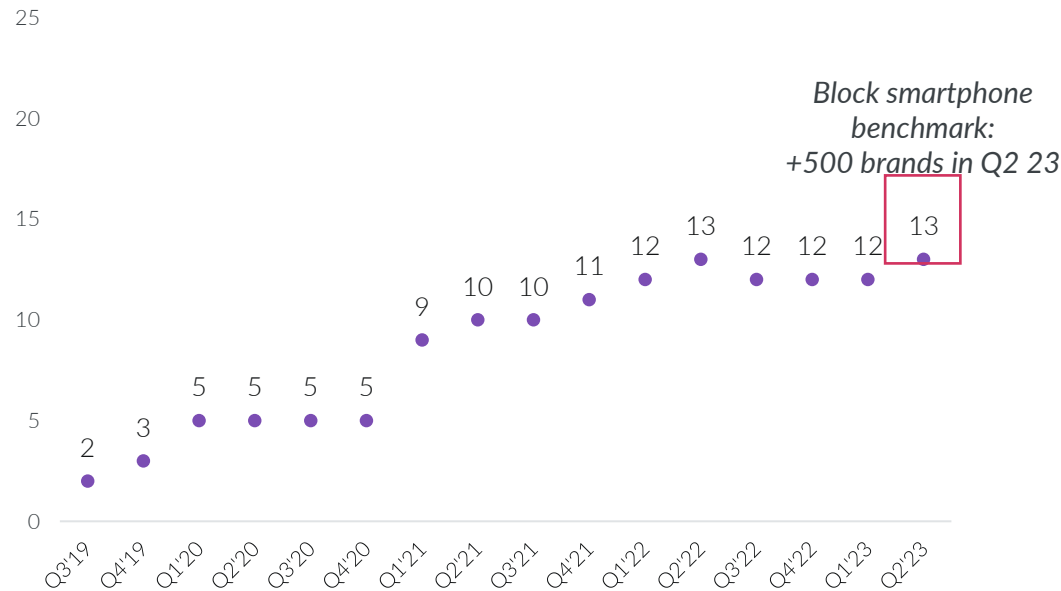
- About **gfknewron**
- > Fact of the week

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

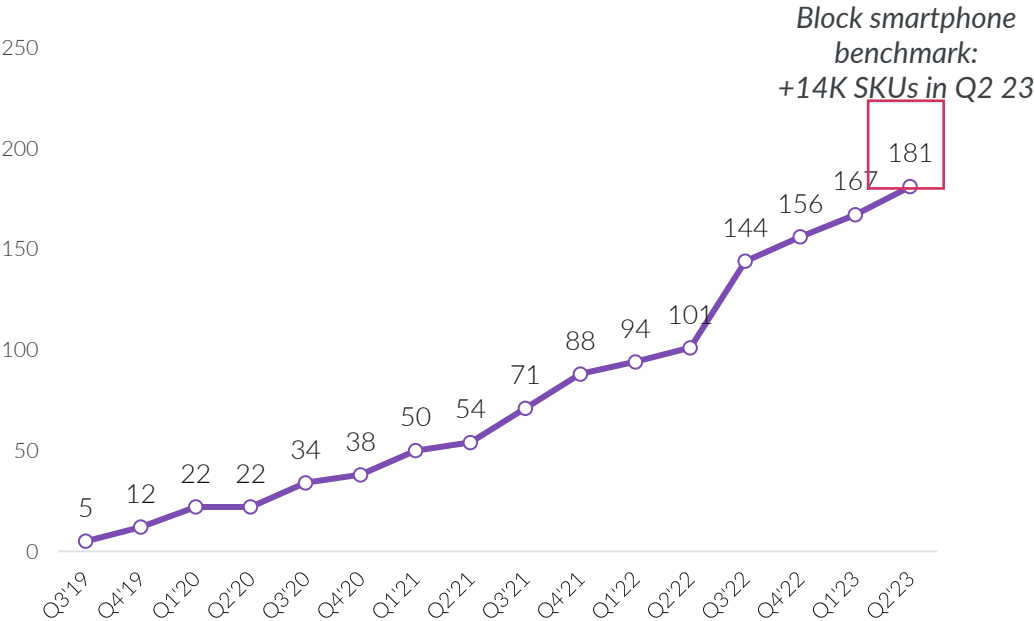
Global excl. NA | GfK Market Intelligence | B2C | Foldable smartphones

While launch of foldable smartphones by Chinese global brands help buzz the segment, market offer and sales remain at niche flagship compared to the total market benchmark.

Number of Different Selling Brands



Number of Different Selling SKUs



Weekly retail insights from the Point of Sale

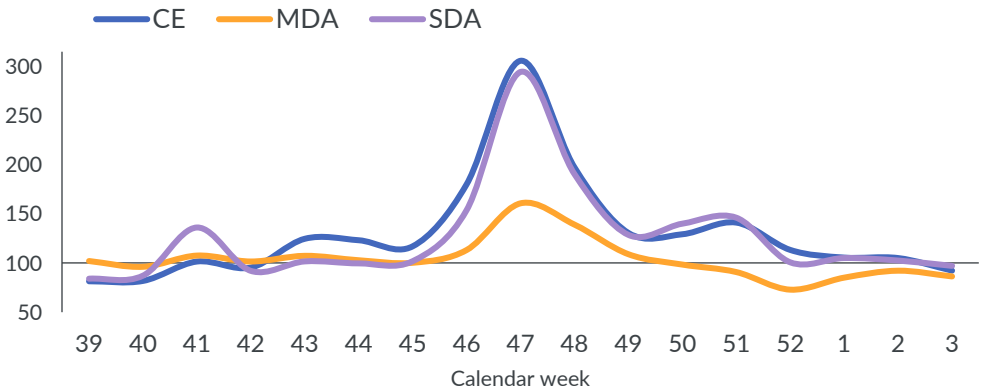
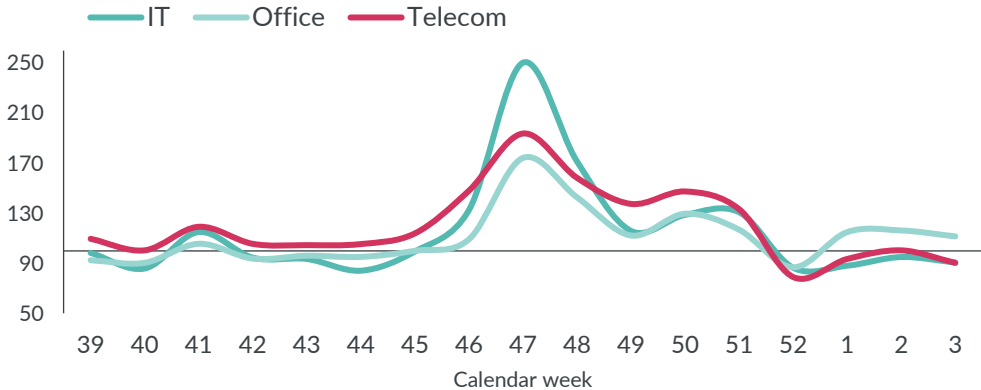
Spotlight on Germany



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

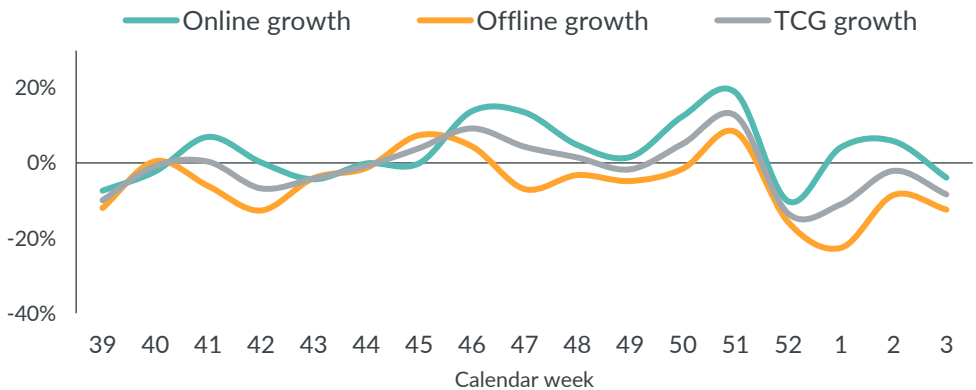
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 03 (Jan 15 – Jan 21)

- Deceleration of traditional retail (-12%) dragged the total TCG market down by -8%. Online sales added to it by delivering -4%.
- IT/Office products posted negative trends throughout, with monitors hit the least at -4% and mobile computing delivering -18%. Smartphones slumped at -11%.
- While MDAs performed similarly to IT/Office, there were rays of light in CE with audio home systems experiencing an uplift of 17%. In the SDA sector, dental care grew by 12%, air treatment delivered a plus of 27%, and food preparation was the star at +115% (due to promotion in mass merch).

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 03 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.

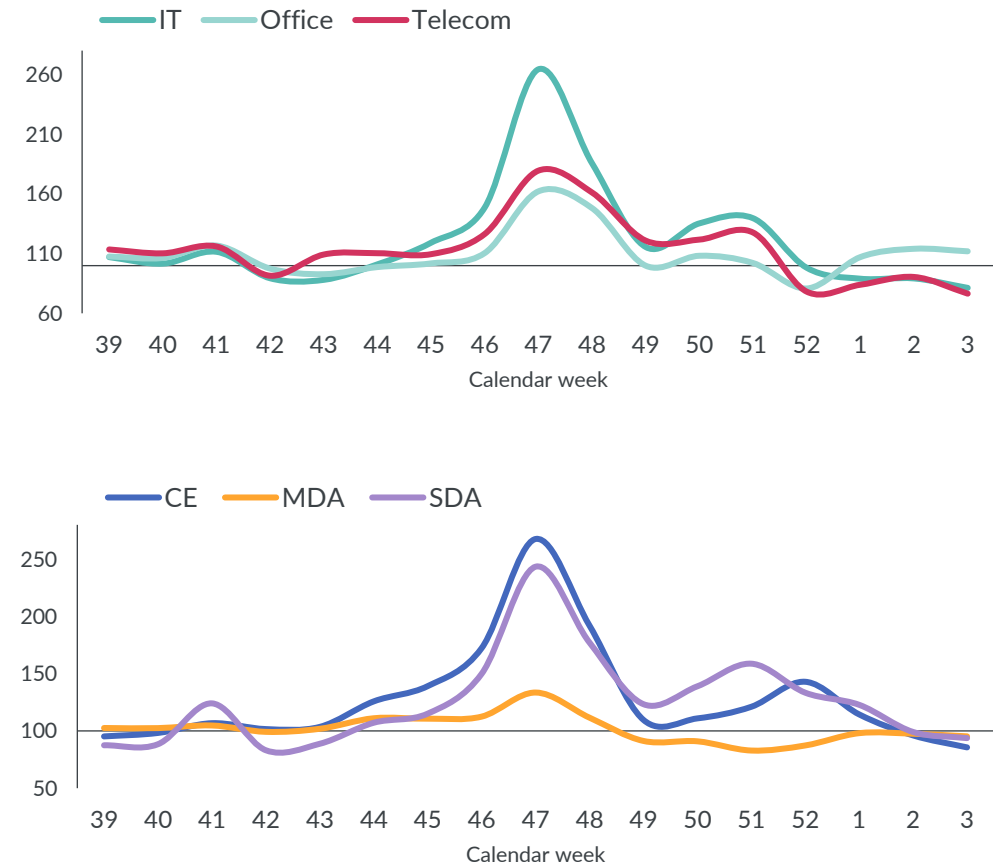
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

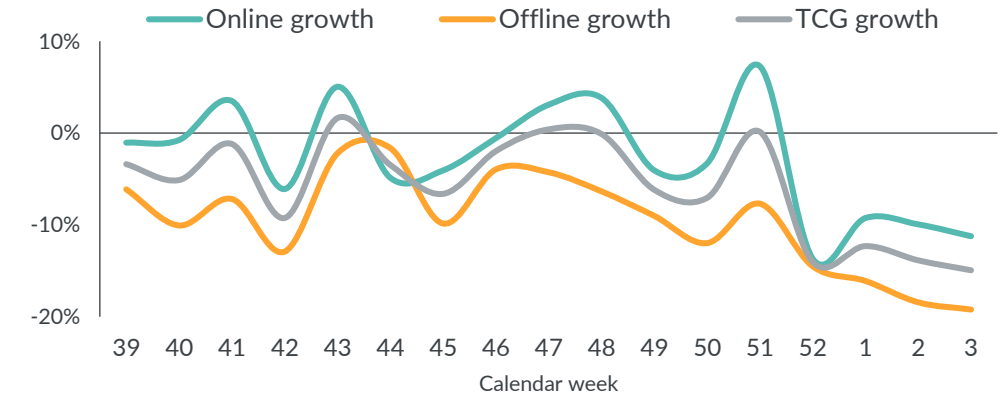


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

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 03 (Jan 15 – Jan 21)



- Deceleration of traditional retail (-19%) dragged the total TCG market down by -15%. Online sales added to it by delivering -11%.
- The main drivers of this development were media tablets at -40% and smartphones with high sales revenue at -23%. Peripherals grew – mice at +16% and keyboards at +9%. Laser printers experienced a shift of +30%.
- While audio home systems at -21% added to the weak result of TCG, food preparation posted a plus of 21%. Except for cooling at -6%, all other MDA and SDA categories delivered moderate growth. TVs declined by 10%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 03 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

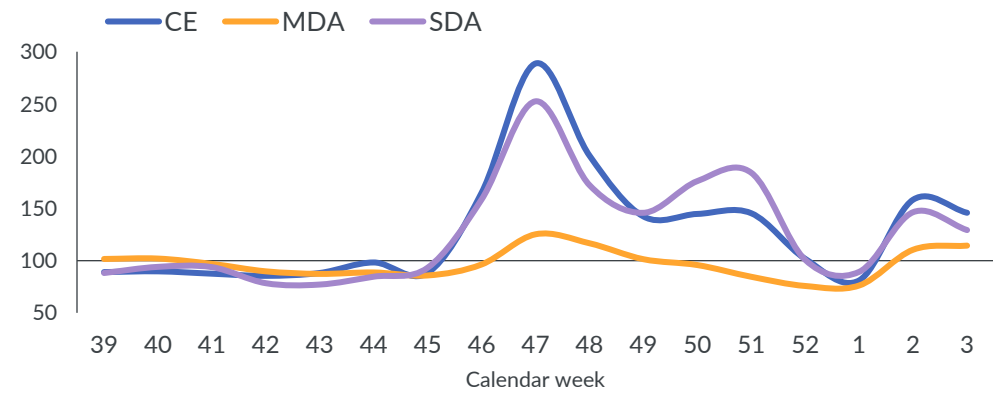
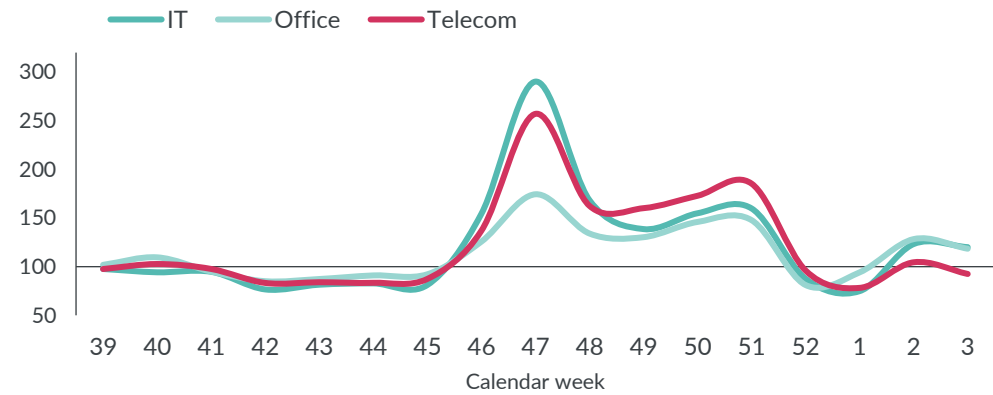
Weekly retail insights from the Point of Sale

Spotlight on France

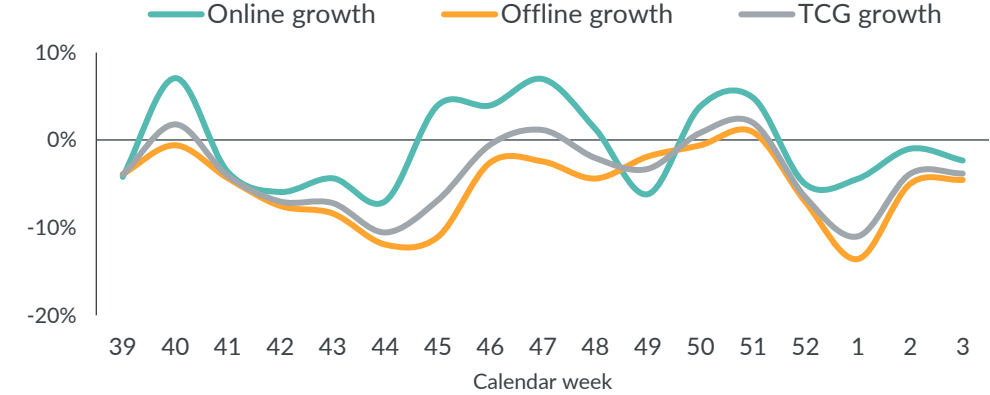


- About **gfknewron**
- Fact of the week
- Germany
- Great Britain
- > France
- Italy
- Spain
- Japan
- Brazil
- China

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 03 (Jan 15 – Jan 21)



- Online sales delivered -2% and traditional retail was down 5%, resulting in a drop of 4% for the total TCG market.
- Media tablets at -15% were the worst-performing product group in week 3, and mobile computing claimed second place at -13%. Mice and laser printers gained ground at +7% and +3% respectively. Smartphones lagged at -11%.
- As with media tablets, soundbars were down by 15% in week 3. While PTV and MDAs posted negative trends, SDA categories grew with dental care out in front at +47% and hot beverage makers at +2%. Only food preparation experienced a drop of 4%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 03 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

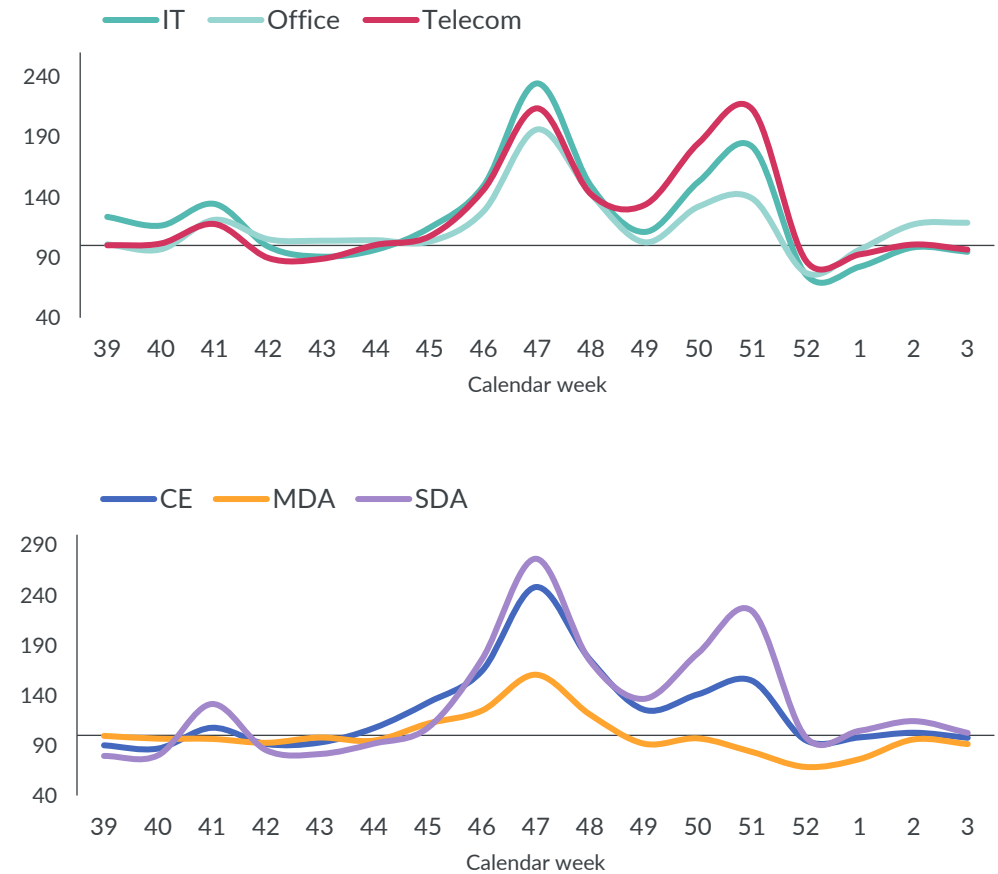
Spain

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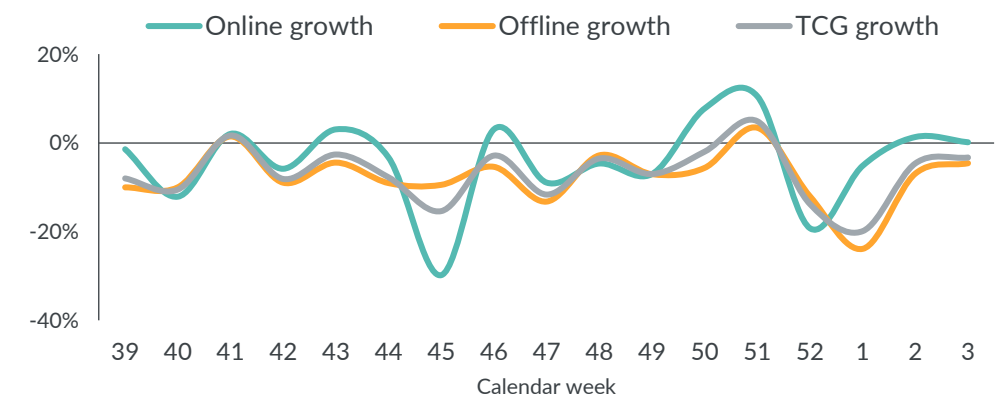
Brazil

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 03 (Jan 15 – Jan 21)



- Traditional retail experienced a minus of 5% versus week 3 in 2023. Combined with flat online sales this resulted in a decline of 3% for the total TCG market.
- Mobile computing declined by 16% and inkjet printers lost 14%. Desk computing and media tablets delivered slight increases of 2% and 4% respectively. Smartphones posted a slight plus of 3%.
- The best-performing category in week 3 was hot beverage makers at +16%. Food preparation and vacuum cleaners delivered slightly positive trends. Washing machines were stable. CE products declined throughout.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 03 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

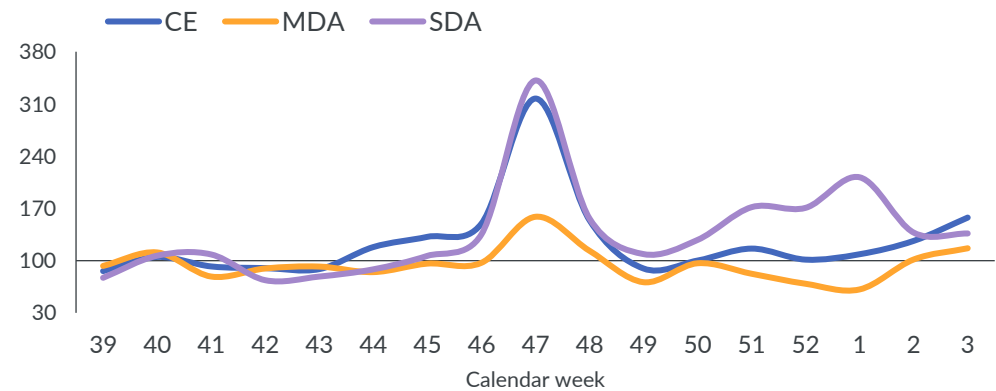
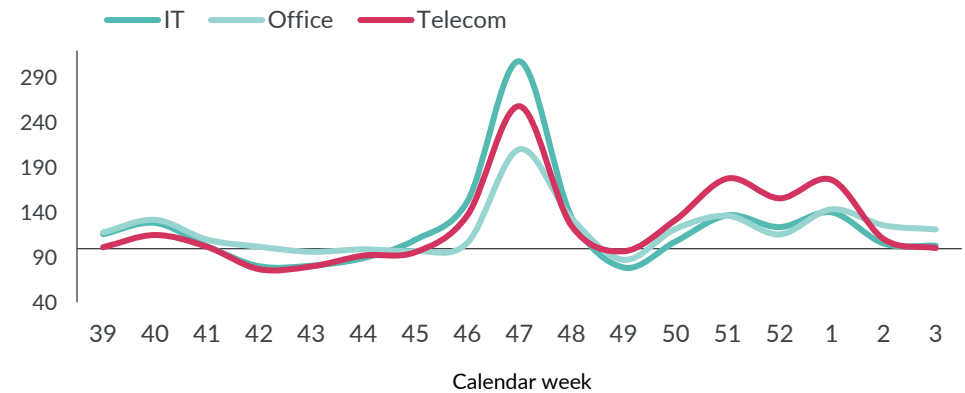
➤ Spain

Japan

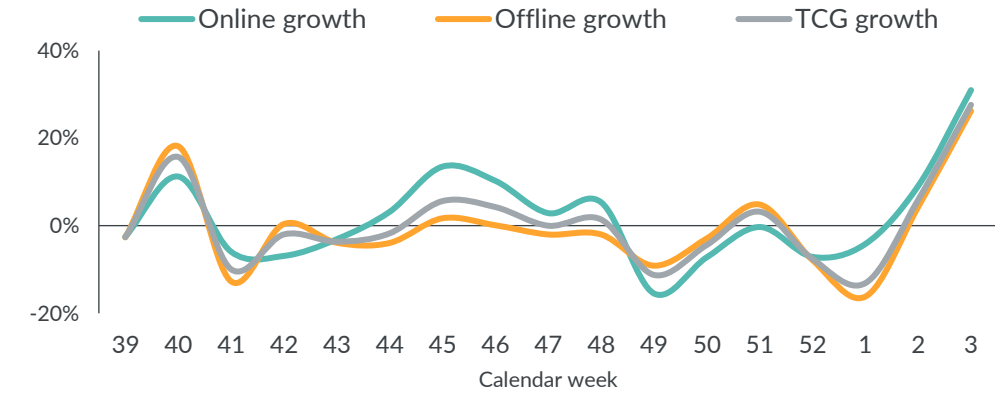
Brazil

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 03 (Jan 15 – Jan 21)



- Strong results for online sales (+31%) pushed the total TCG market to a plus of 28%. Traditional retail at +26% added to it.
- Except for laser printers at -18%, all other IT/Office products delivered growth, with media tablets out in front at +15%. Telecom products were successful in week 3 with smartphones at +26% and headsets up 21%.
- TCG development was driven by MDA/SDA/CE products with growth rates of between +63% for vacuum cleaners and +24% for washing machines.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 03 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

Germany

Great Britain

France

Italy

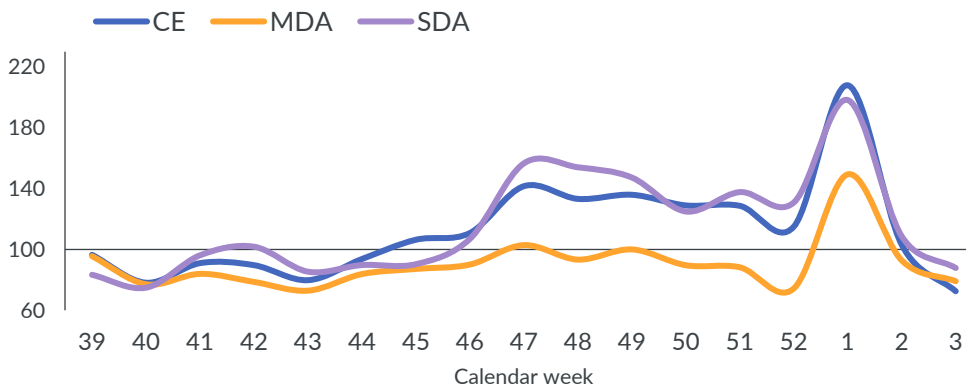
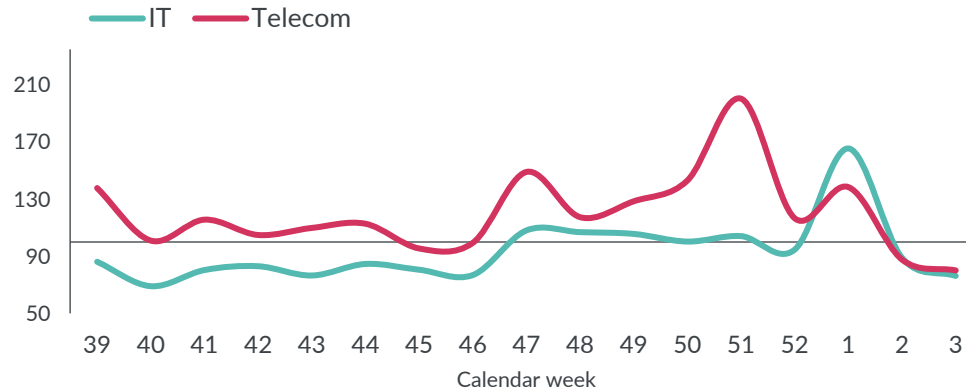
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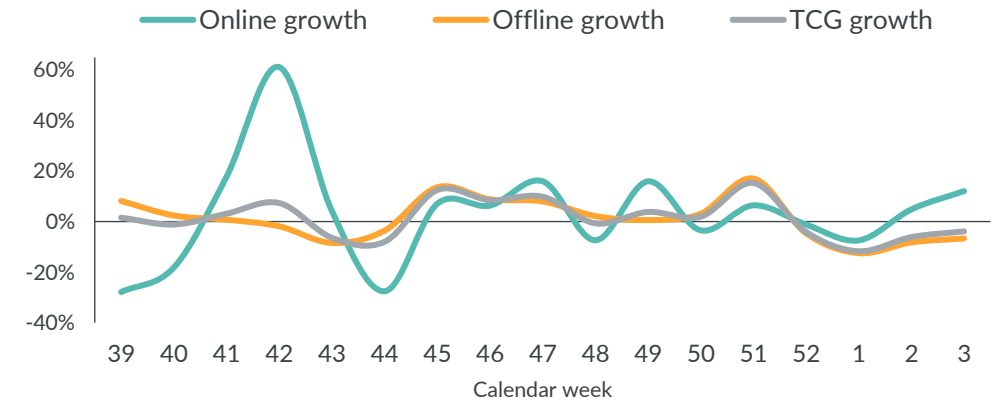
Brazil

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 03 (Jan 15 – Jan 21)



- Online sales delivered +12% but due to its small share compared with traditional sales which lost 7%, the online result could not visibly impact the decline of 4% for the total TCG market.
- Mobile computing decelerated at -21% while media tablets declined by 12%. Smartphones were flat and headsets won 8%.
- Except for air treatment (-4%), SDA products posted positive trends with dental care in the lead at +16%. CEs were negative throughout with soundbars posting -17% and TVs down 5%. MDAs too were slightly negative.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 03 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

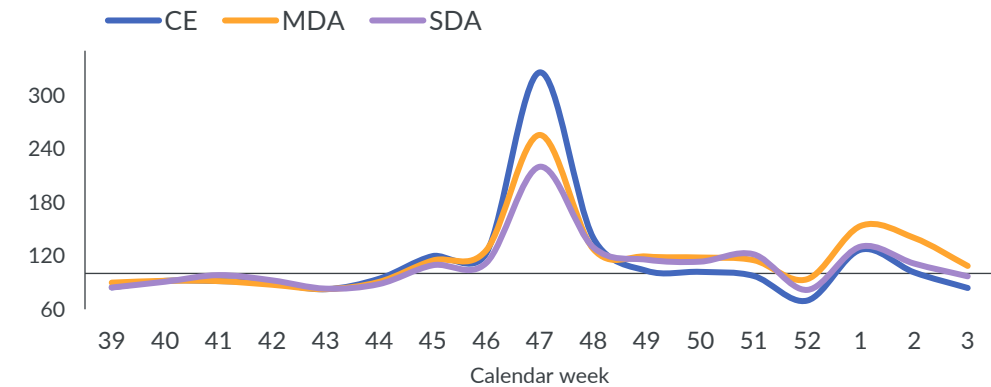
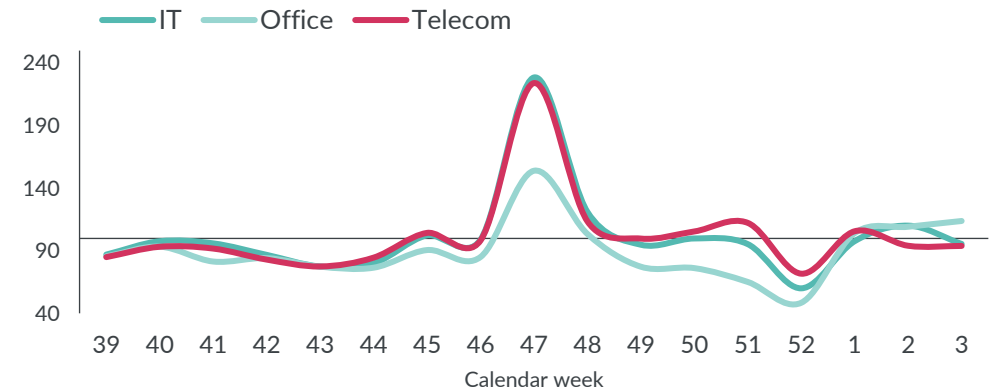
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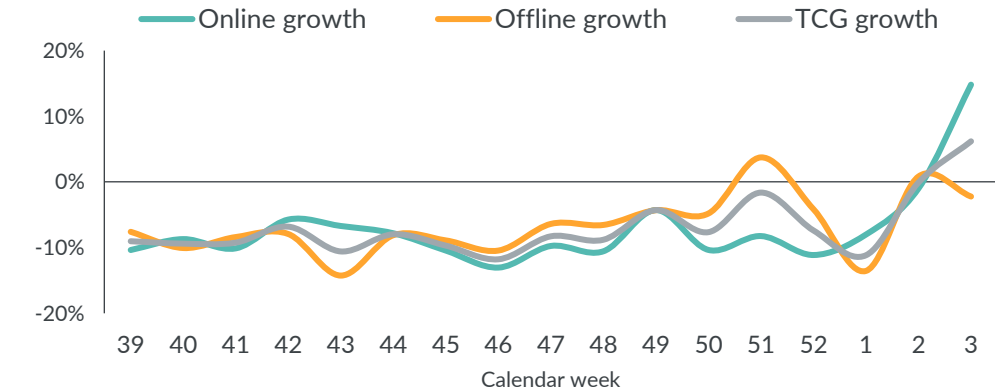
➤ Brazil

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 03 (Jan 15 – Jan 21)



- Traditional retail lost 2% but online sales at +15% balanced that out, and the result was an upswing for the total TCG market of 6%.
- IT/Office products saw diverging results with +67% for media tablets and -51% for desk computing. Printers gained 17%. Smartphones were weak at +2%.
- Among MDA/SDA/CE products only audio home systems and shavers posted negative results, at -17% and -1% respectively. Cooling was up 30%. PTV experienced a slight uptick of 3%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 03 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 – 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

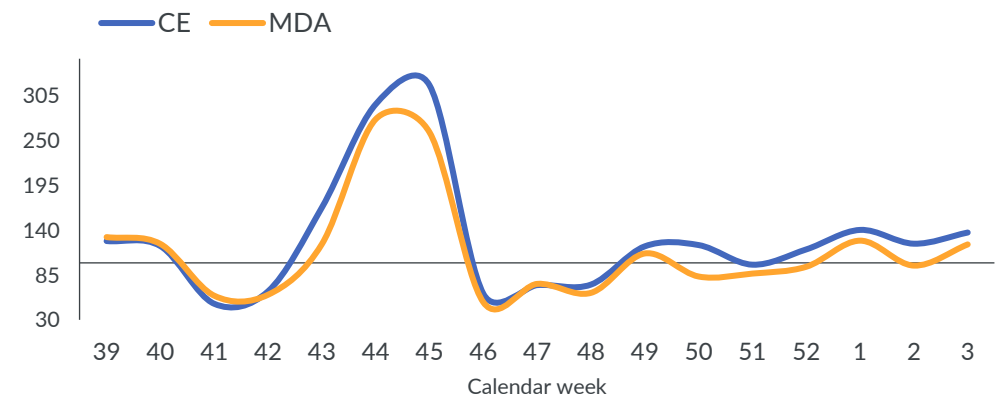
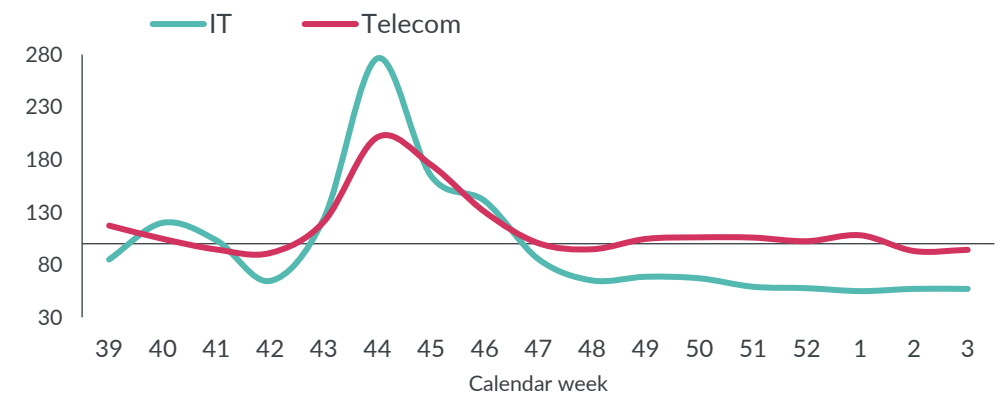
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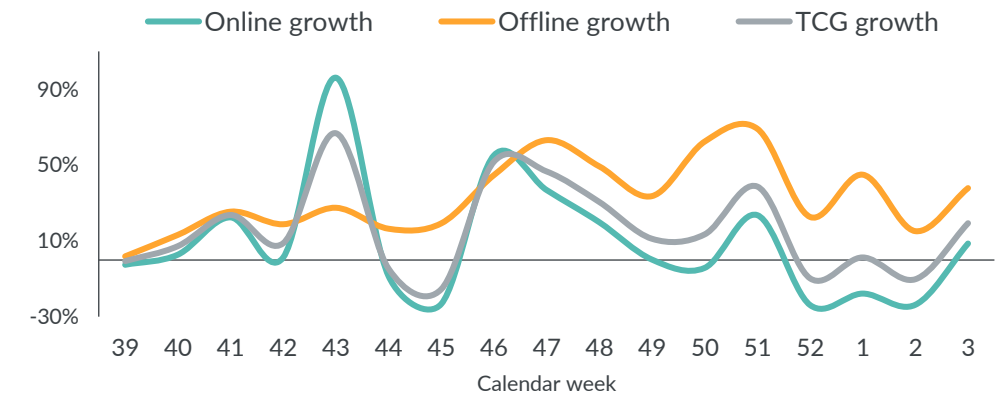
Brazil

➤ 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 03 (Jan 15 – Jan 21)



- The total TCG market experienced a good recovery, up 19%, driven by traditional retail at +38%. Online sales at +9% added to the good result.
- Smartphones at +18% were the driving force of this development due to their high share in the product group basket. Mobile computing delivered a minus of 22%.
- Week 3 in 2024 saw an increase of 9% for cooling. Growth for washing machines (+14%) and PTV (+27%) was even double-digit.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 03 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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