



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 191
cw05/2024

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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 2024 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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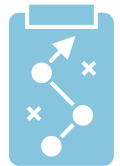
gfknewron gives the right people instant access to key market, brand and consumer data to enable faster, superior decision-making.



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Fact of the Week

Cookware: all product groups are slumping YTD except ovenware and thermo pots



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Sales Value USD, Sales Value Share, Growth rate PY | January – August 2023

After beneficial sales during the pandemic, cookware has been decelerating the second year in a row.

> Fact of the week

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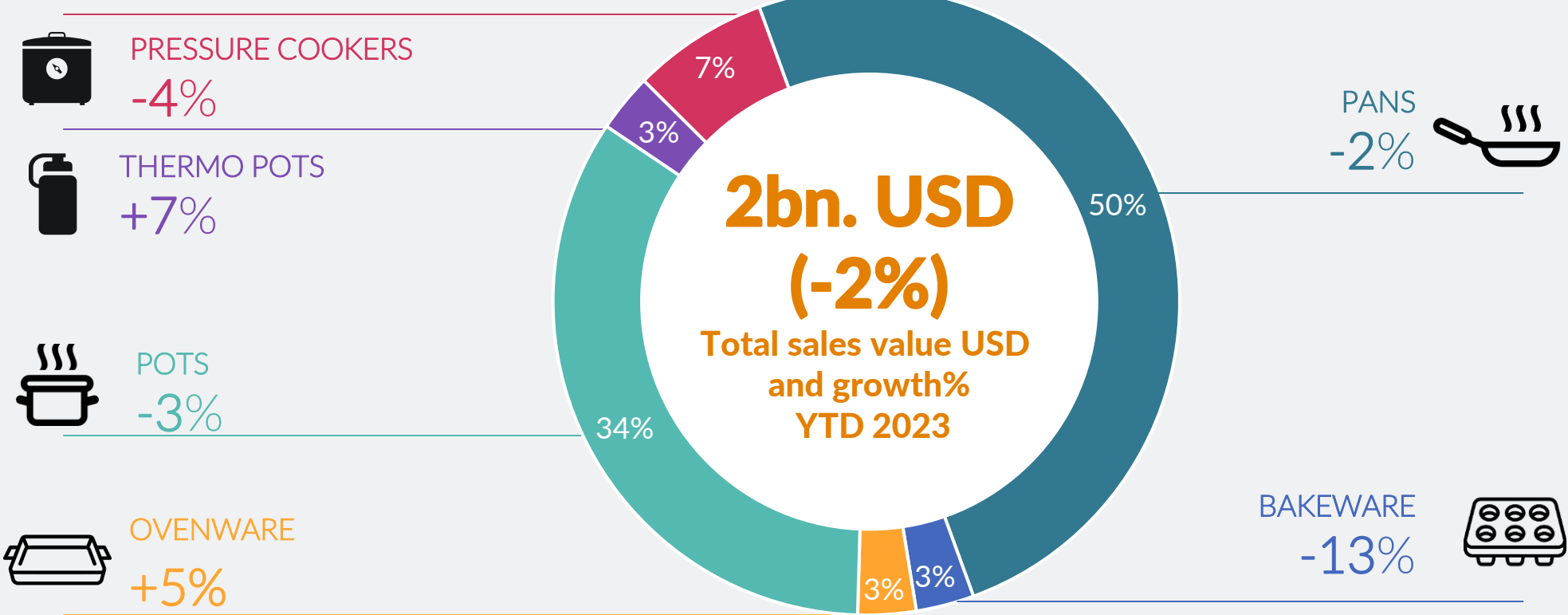
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Weekly retail insights from the Point of Sale

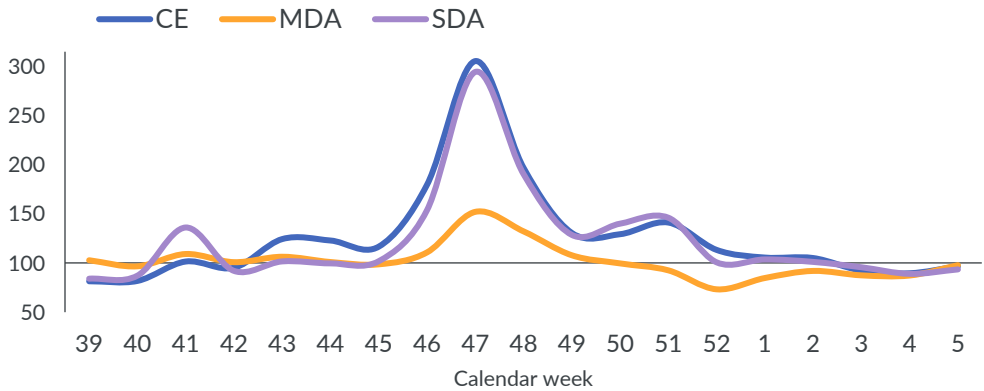
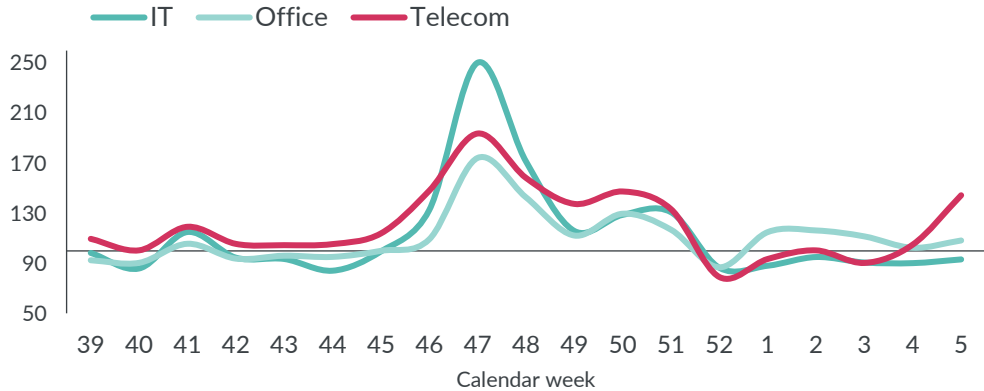
Spotlight on Germany



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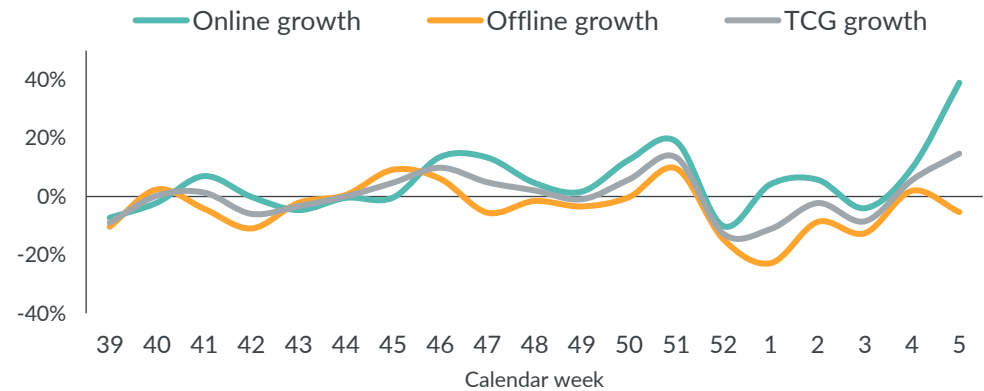
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 05 (Jan 29 – Feb 04)



- Online sales at +39% boosted the total TCG market to a plus of 15%. Traditional retail delivered a moderate decline of 5%.
- The catalyst of this development in the first week of February was smartphones, propelled by new launches, which achieved growth of 45% compared to week 5 in 2023. All IT/Office products slumped in double digits, ranging from -17% for monitors to -22% for mobile computing.
- Soundbars, air treatment, TVs, and hot beverage makers performed similarly to IT/Office. There were only a few rays of light from shavers (+7%), washing machines (+4%), dental care (+3), and vacuum cleaners (+2%).

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 05 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk 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.

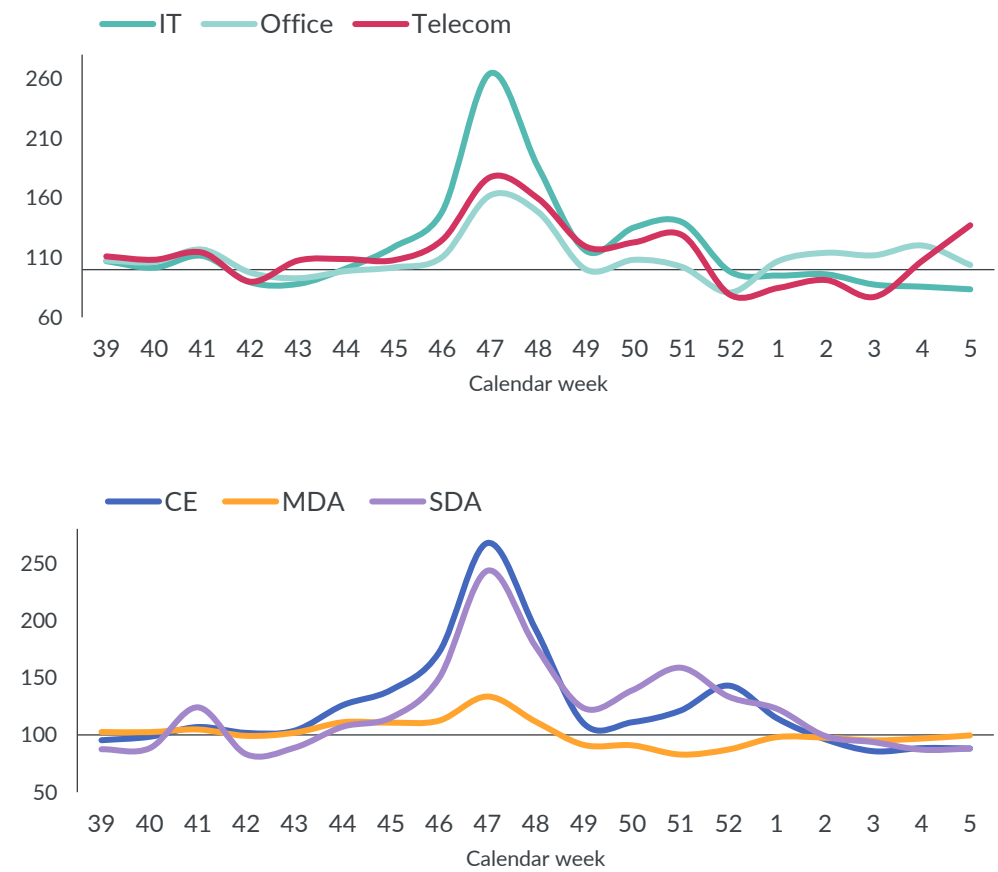
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

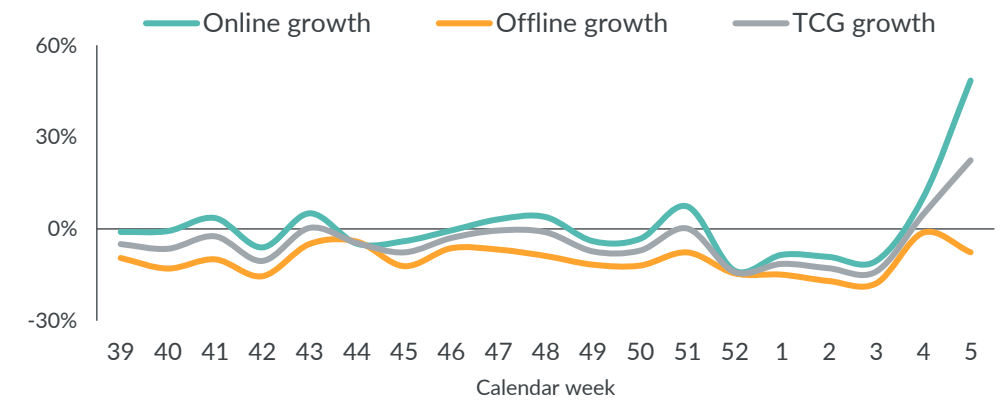


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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 05 (Jan 29 – Feb 04)



- Eye-catching growth for online sales (+48%) pushed the total TCG market to +22%. Traditional retail decelerated by 8%.
- The main driver of this development was smartphones at +52% due to new launches. While most IT/Office products witnessed negative trends, mice and keyboards grew by 23% and 20% respectively.
- Within MDA/SDA/CE products, audio home systems, and soundbars stood out with double-digit negative results of -20% and -17%. All other categories posted slight rises and falls of between +4% and -4%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 05 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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Italy

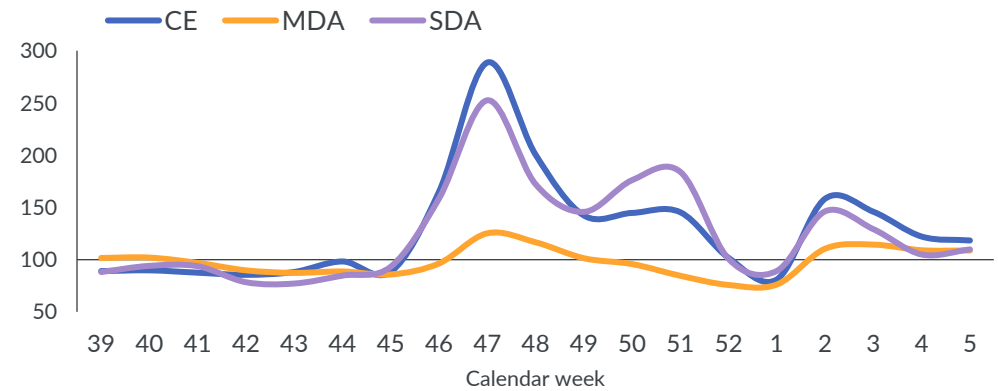
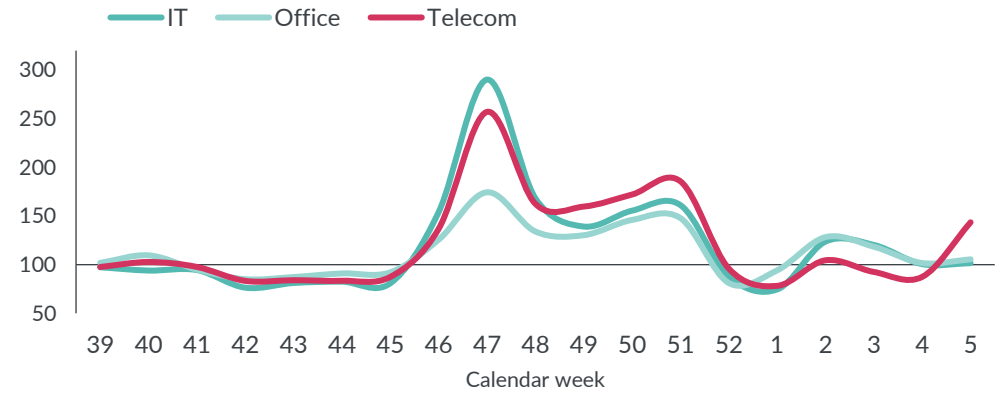
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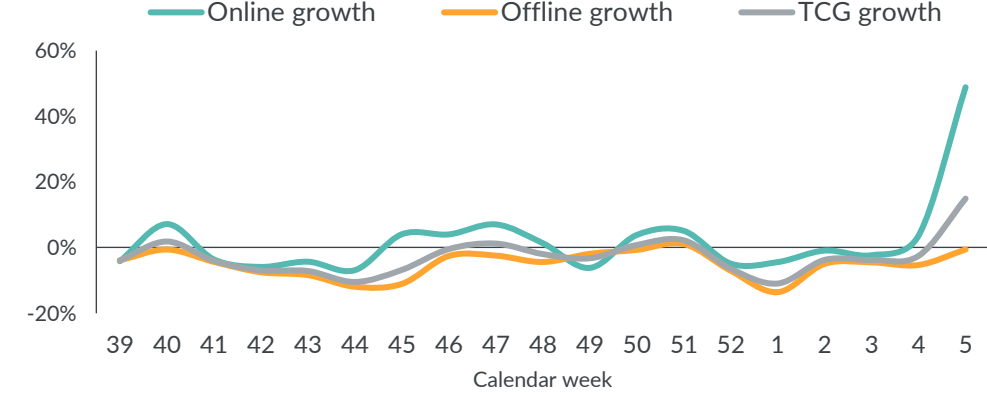
Brazil

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 05 (Jan 29 - Feb 04)



- Although traditional retail was down 1%, impressive results for online sales (+49%) boosted the total TCG market, which posted +15%.
- New launches in smartphones led to a plus of 67% in week 5. In the IT and office sectors, only monitors, mice, and keyboards saw moderate growth. All other categories saw negative trends, led by mobile computing at -12%.
- Dental care at +74% added to the good result of TCG, along with vacuum cleaners at +16% and shavers at +15%. Audio home systems at -25% were the worst-performing category in week 5.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 - 05 2024; Technical consumer goods include: Telecom: Smartphones, headsets - IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, 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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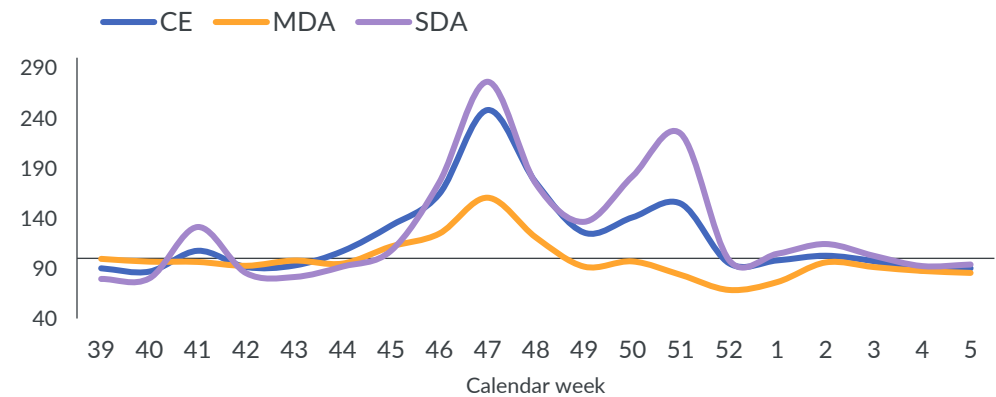
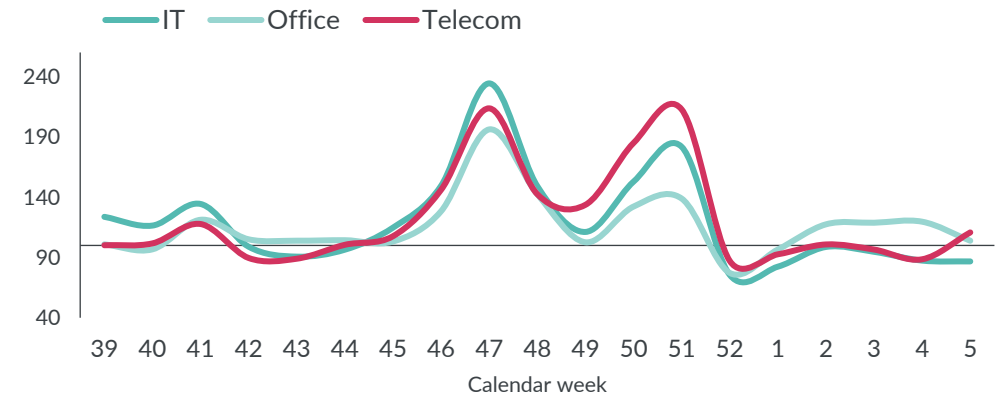
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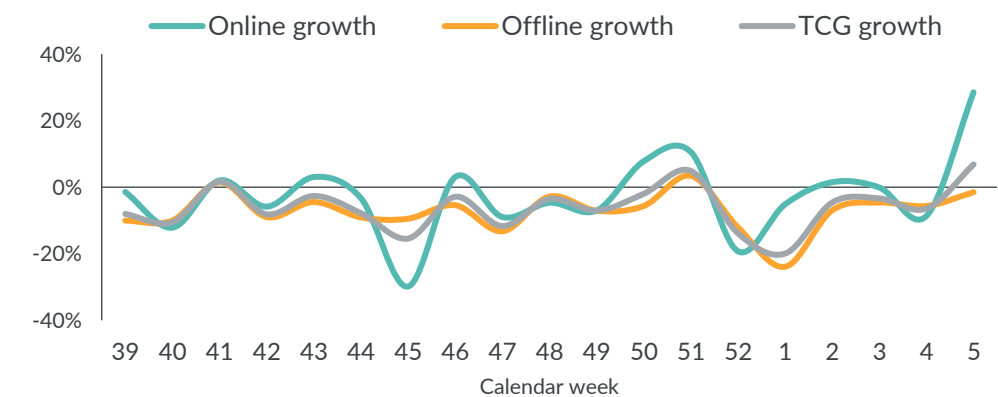
Brazil

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 05 (Jan 29 – Feb 04)



- Growth of 29% for online sales led to a plus 7% for the total TCG market. Traditional retail experienced a slight drop of 1%.
- Smartphones were the growth leaders in week 5, at +31%. Media tablets and desk computing posted moderate growth of +4% and +6%. Printers and mobile computing experienced double-digit declines.
- In MDA/SDA/CE, audio home systems led the negative scores at -29%. Air treatment at -26% had a similarly depressed result. For SDAs, the highlight in week 5 was vacuum cleaners at +22%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 05 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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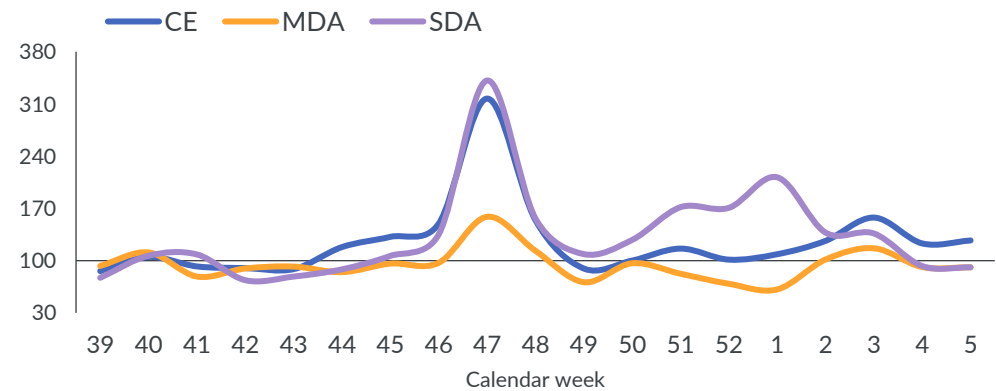
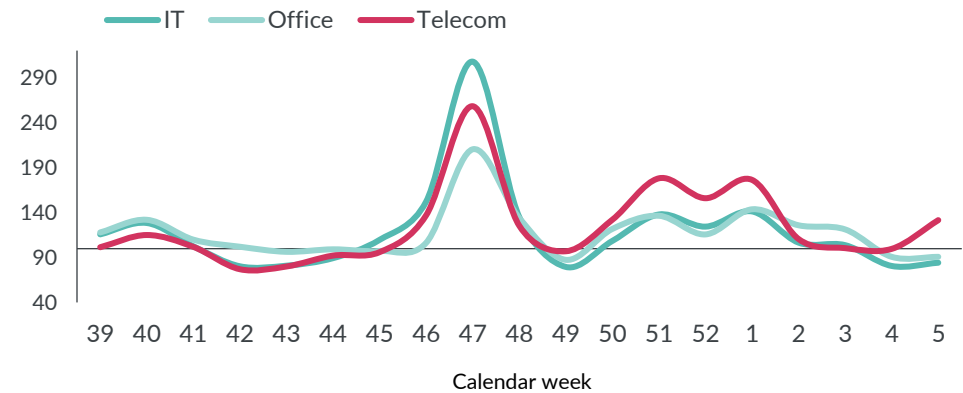
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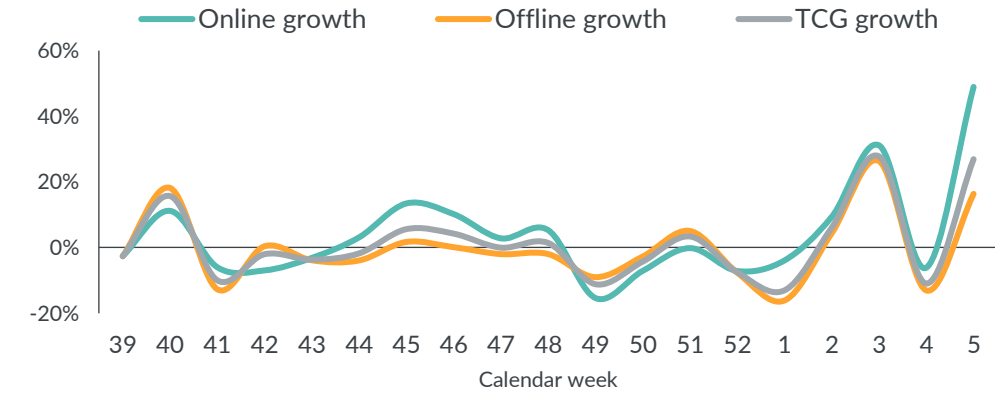
Brazil

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 05 (Jan 29 – Feb 04)



- A recovery for both distribution types, online at +49% (up from -6% the previous week) and traditional at +16% (up from -13%) delivered growth of 27% for the total TCG market.
- Smartphones (fueled by new launches) were the driving force of this trend with a plus of 82%. Headsets were up 20%. Desk computing and media tablets were flat, but printers and mobile computing fell by double digits.
- While TVs delivered a good result of +38%, audio home systems declined by 20%. Within MDA/SDA categories, only cooling was negative, at -7%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 05 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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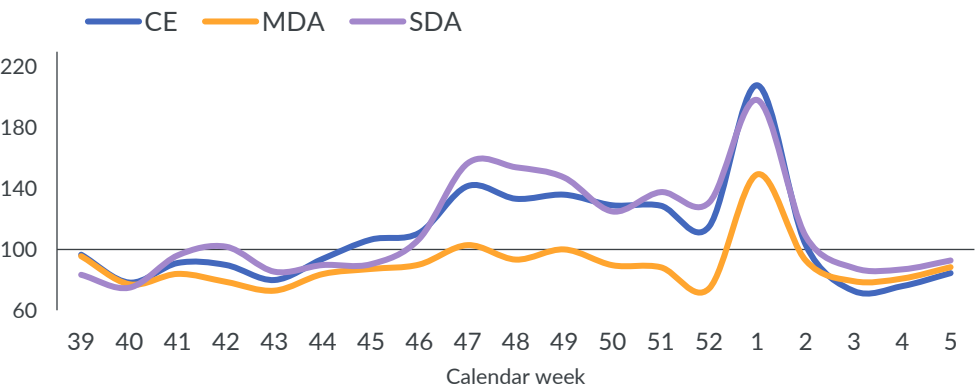
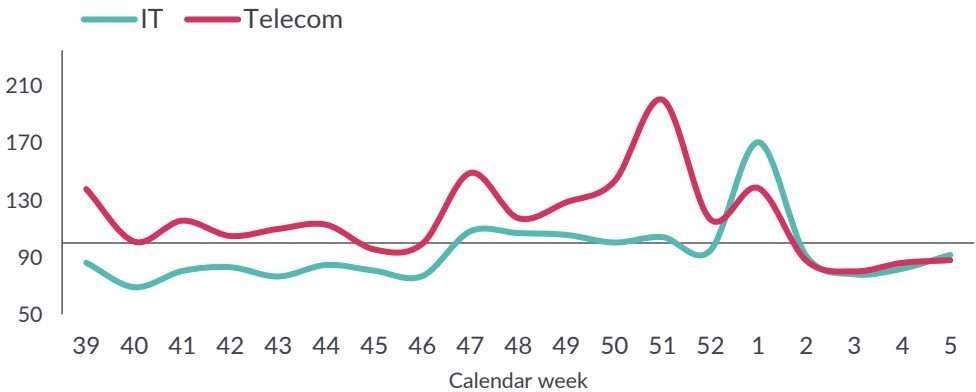
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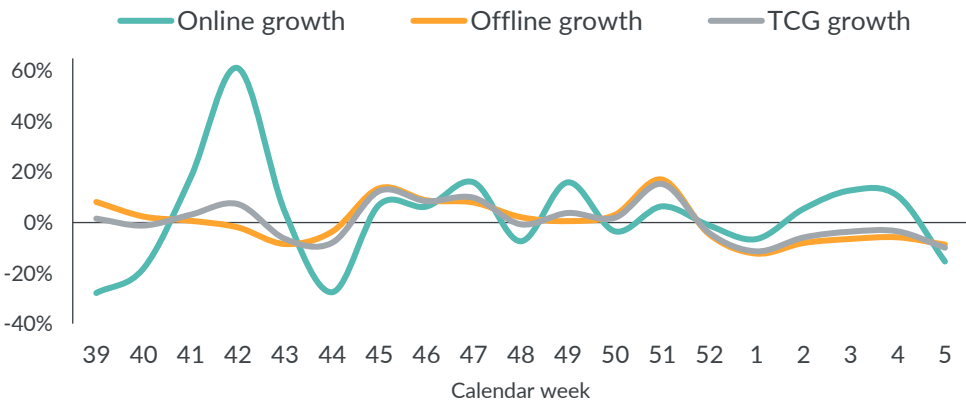
Brazil

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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 05 (Jan 29 – Feb 04)



- Compared to week 5 in 2023, online sales declined by 15% and traditional retail lost 9%, which led to a drop of 10% for the total TCG market.
- Mobile computing decelerated at -27% but media tablets performed even worse, at -44%. Smartphones lagged at -3%. Headsets were up 9%.
- Mixed trends for SDA products saw dental care in the lead at +8% and air treatment and food preparation come in last at -4%. MDAs lost moderately as well, at 9%. In CE, soundbars were the worst-performing category at -14%. TVs lagged at -6%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 05 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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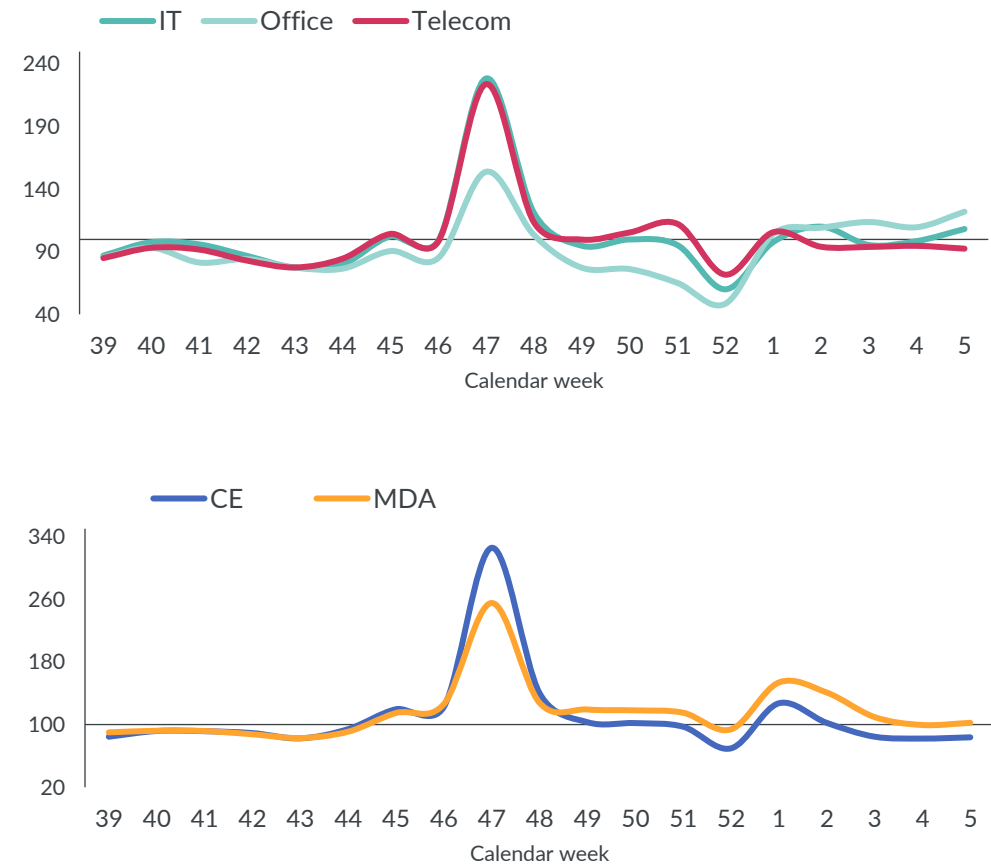
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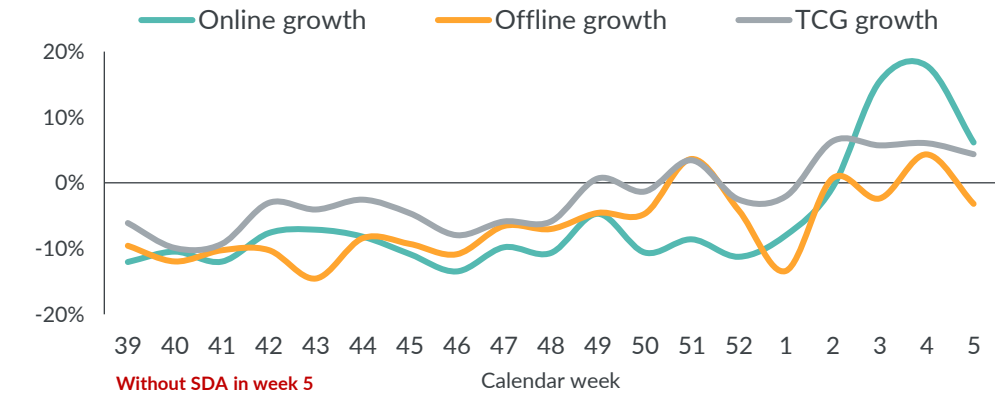
> Brazil

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 05 (Jan 29 – Feb 04)



- Traditional retail delivered -3% but online sales at +6% balanced out the decline and led to an increase of 4% for the total TCG market.
- Media tablets at +49% were the best-performing category in week 5 and laser printers at +15% claimed second place. Desk computing experienced a drop of 7%. Smartphones lagged at -7%.
- Washing machines and cooling were able to gain 11% compared with the same week the previous year. At -9%, audio home systems were the worst-performing category in week 5. TV sales were flat.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 05 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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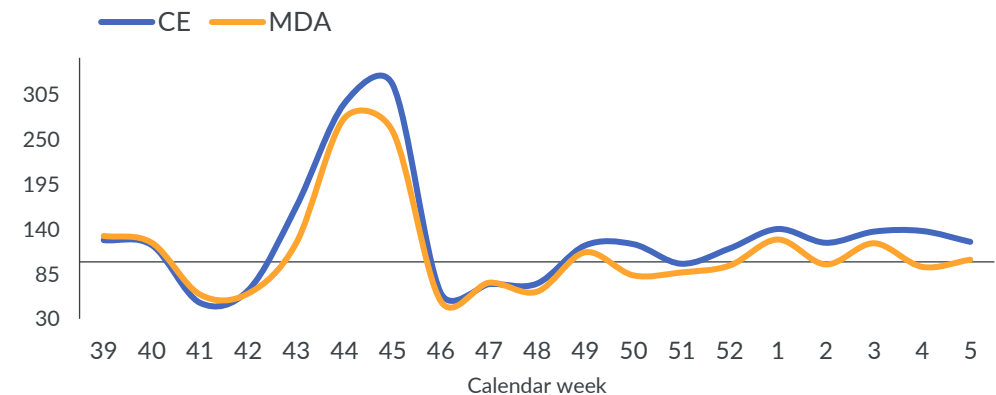
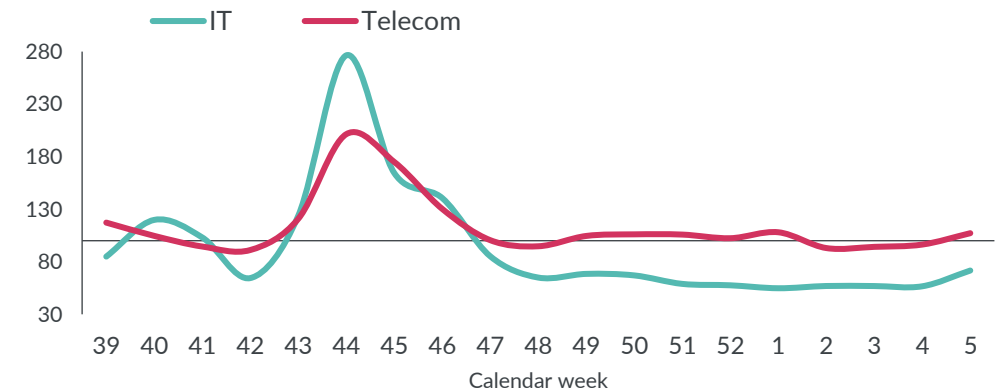
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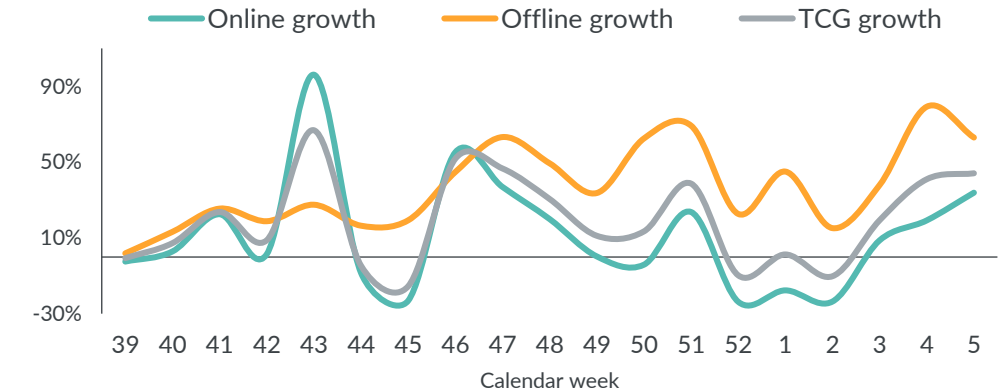
Brazil

➤ 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 05 (Jan 29 – Feb 04)



- As in week 4, we saw high growth rates in week 5 as well. Traditional retail gained +63% versus week 5 in 2023 and online sales were up 34%, leading to +44% for the total TCG market
- Smartphones were the driving force of this development not only due to their high share in the product group basket – but also with an impressive growth rate of +51%. Mobile computing delivered a minus of 20%.
- Week 5 in 2024 saw double-digit increases for washing machines (+27%) and cooling (+25%). TVs delivered a good performance at +36%.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 05 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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