



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 192
cw06/2024

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Quick, comprehensive, and accessible business insights



> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China

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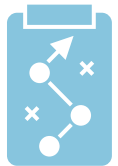
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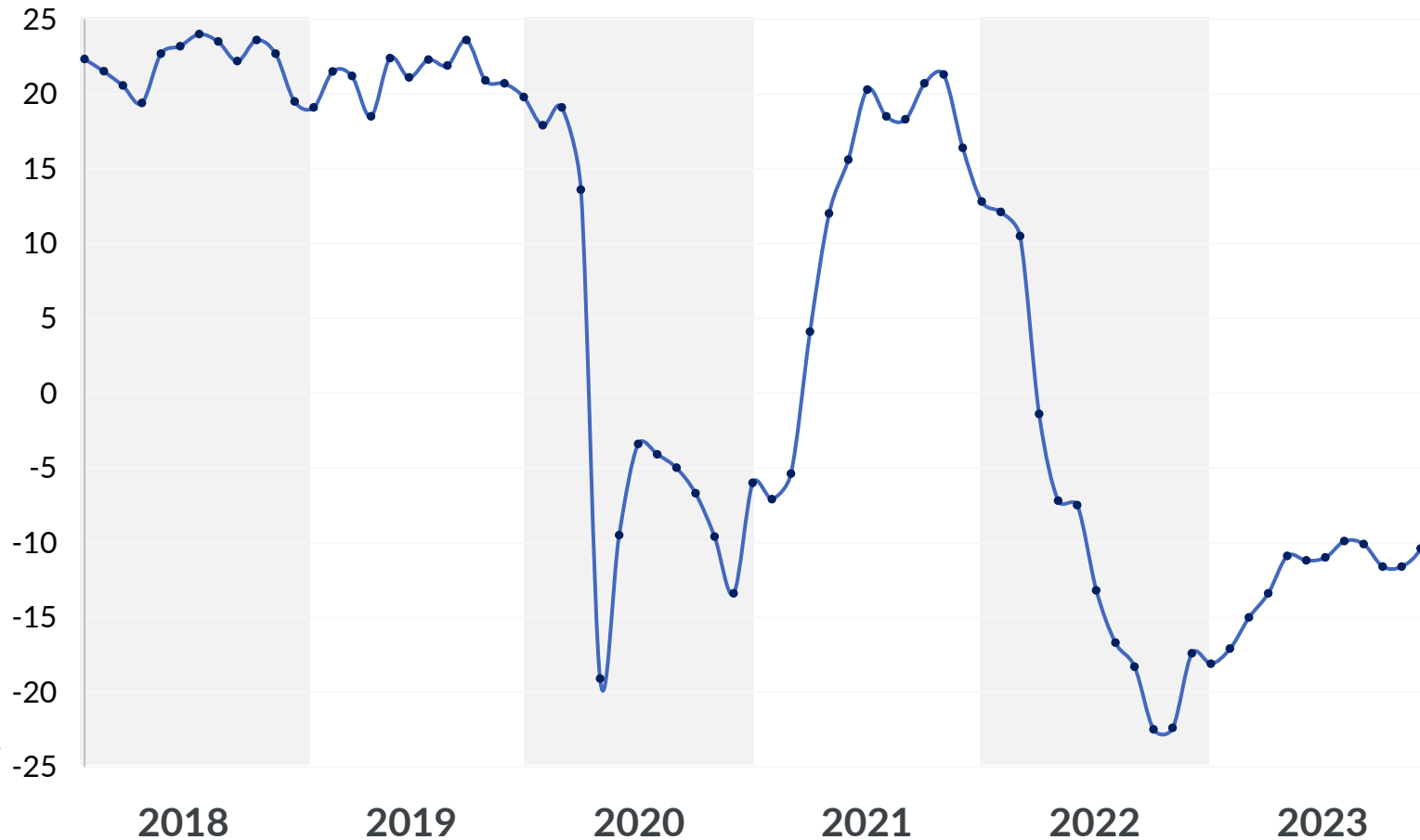
- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
- **gfknewron Consumer** – Understand your shoppers, reach the right audience and maximize ROI
- **gfknewron Predict** – Forecast marketing potential, build the right strategies and optimize revenue

Fact of the Week

European Consumer Climate climbs to its highest level since May 2022 at the end of the year



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Economic expectations
Index: -8 | +/- vs prev. month: +4%



Income expectations
Index: -10 | +/- vs prev. month: +4%



Willingness to buy
Index: -23 | +/- vs prev. month: +2%

Weekly retail insights from the Point of Sale

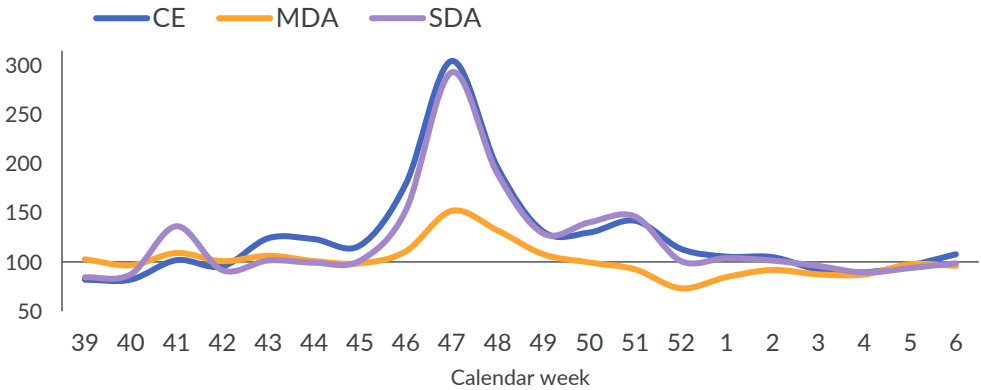
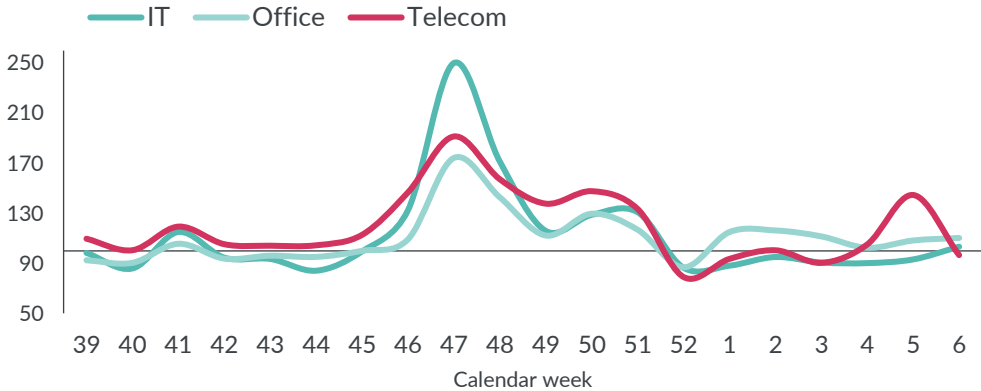
Spotlight on Germany



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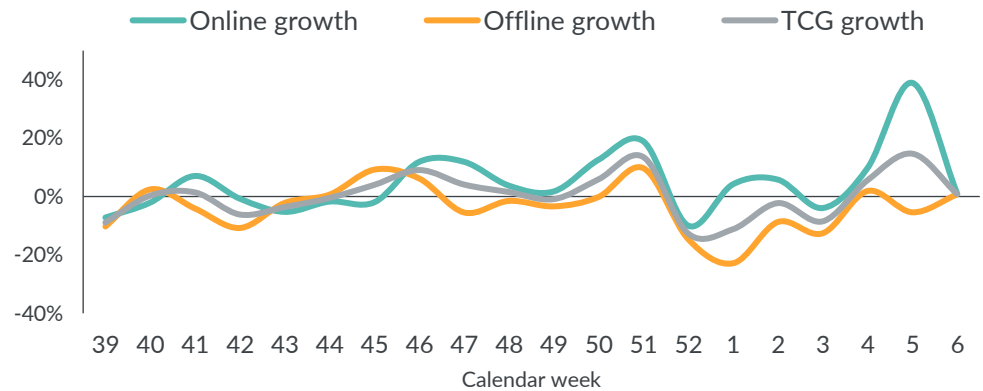
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 06 (Feb 05 – Feb 11)

- At an identical rate of +1%, both traditional retail and online sales lifted the total TCG market to a slight plus of 1%.
- All IT/Office products saw negative trends, ranging from a slight -1% for monitors to -12% for inkjet printers. Smartphones gained a moderate 4%.
- While CE categories performed similarly to IT/Office, posting negative rates of 10% and less, MDAs and SDAs presented a mixed picture. Except for food preparation (-18%), air treatment (-16%), and cooling (-6%), the other categories gained revenue compared to week 6 in 2023.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 06 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.

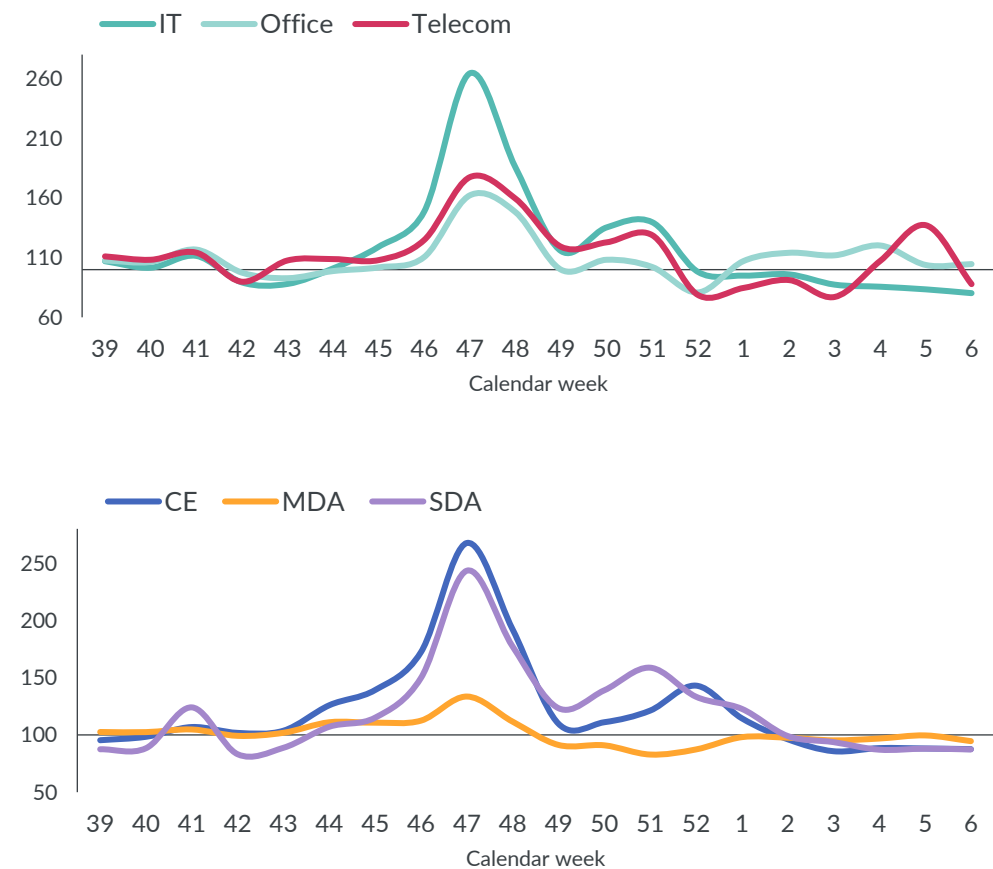
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

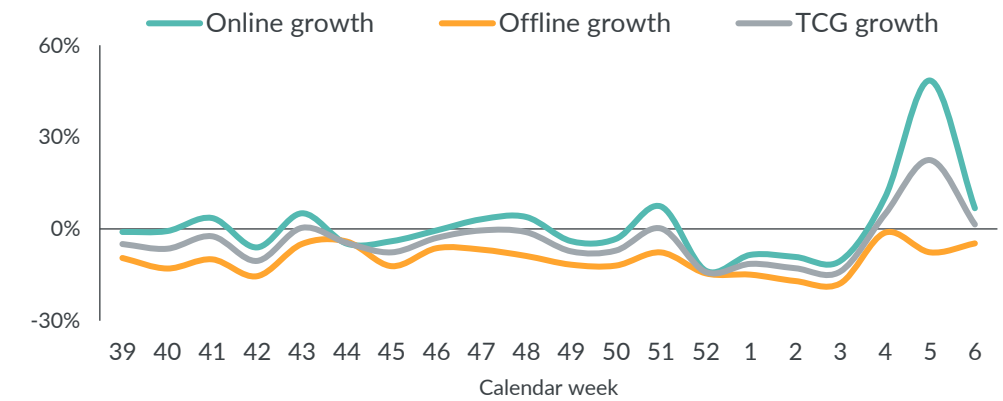


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 06 (Feb 05 - Feb 11)



- At +7%, online sales compensated for the losses of traditional retail (-5%), resulting in a score of +1% for the total TCG market.
- The main driver of this development was smartphones with high sales revenue of +8%. Peripherals grew as well, mice at +32% and keyboards at +25%. Media tablets marked the other end of the scale at -36%.
- Except for audio home systems (-2%) all other CE/MDA/SDA product groups experienced positive rates, ranging from a slight +0.4% for cooling to +14% for hot beverage makers. TVs increased by 6%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 06 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

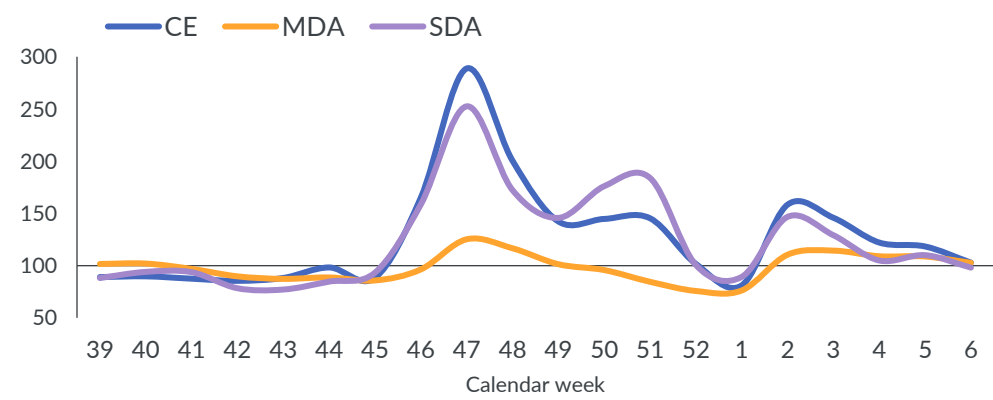
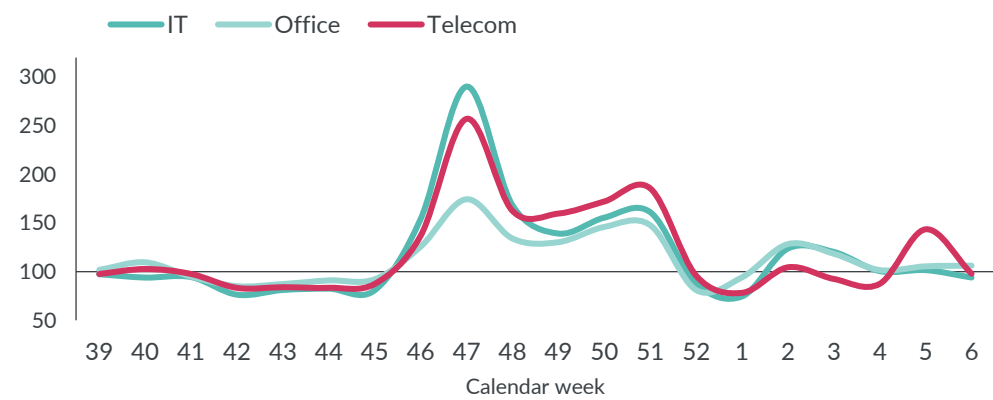
Weekly retail insights from the Point of Sale

Spotlight on France

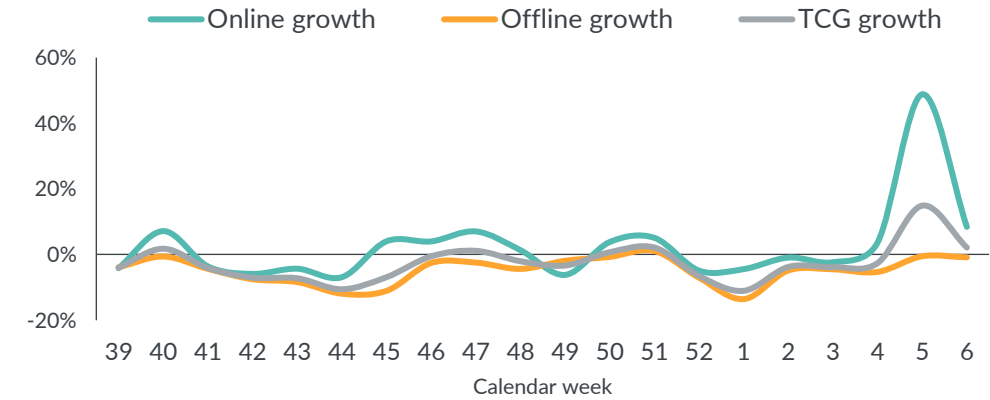


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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 06 (Feb 05 - Feb 11)



- Online sales delivered +8% but combined with traditional retail at -1%, the result for the total TCG market was a plus of just 2%.
- Media tablets, at -16%, were the worst-performing product group in week 6. Mice at +14% marked the other end of the scale. Laser printers were flat. Smartphones saw a moderate increase of 6%.
- MDA/SDA/CE products posted a mixed picture with -7% for audio home systems and +17% for shavers. Dental care was the highlight in week 6, at +40%. PTV posted a slight downtrend of 2%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 06 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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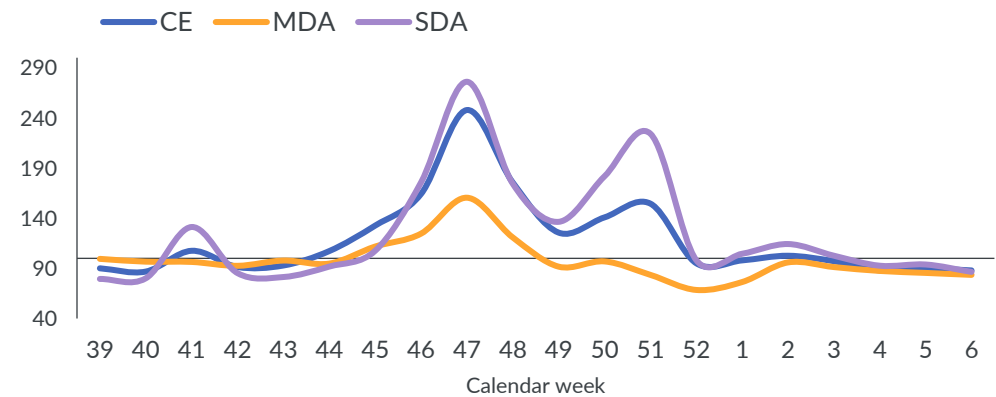
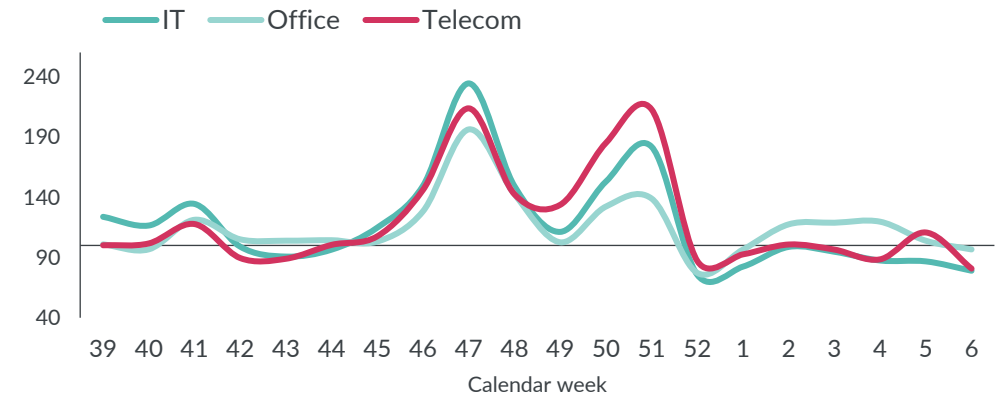
Spain

Japan

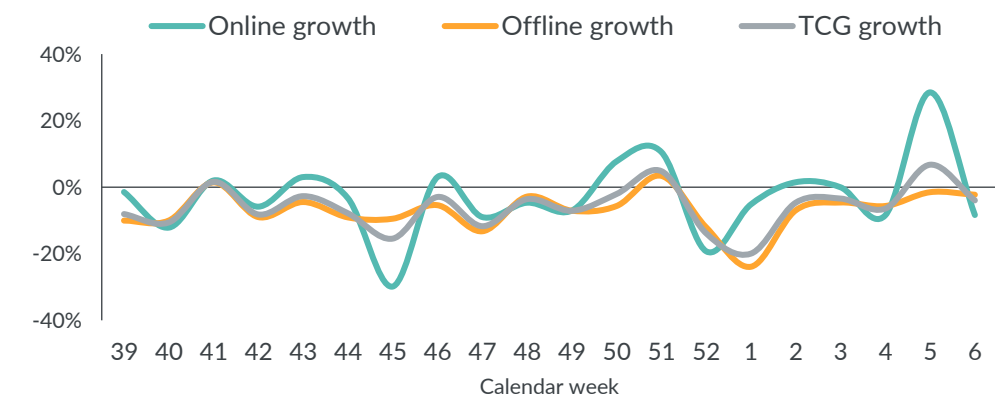
Brazil

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 06 (Feb 05 – Feb 11)



- Deceleration of online sales (-8%) dragged the total TCG market down by -4%. Traditional retail added to it by delivering -2%.
- Most IT/Office categories lost in solid double-digits. Media tablets and desk computing were less negative, posting -7% and -6% respectively. Smartphones lagged at -3%.
- The same applied to CE categories except for PTV at -9%. MDAs and SDAs posted an overall positive picture except food preparation at -5%, shavers at -3%, and cooling at -1%. Dental stood out at +16%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 06 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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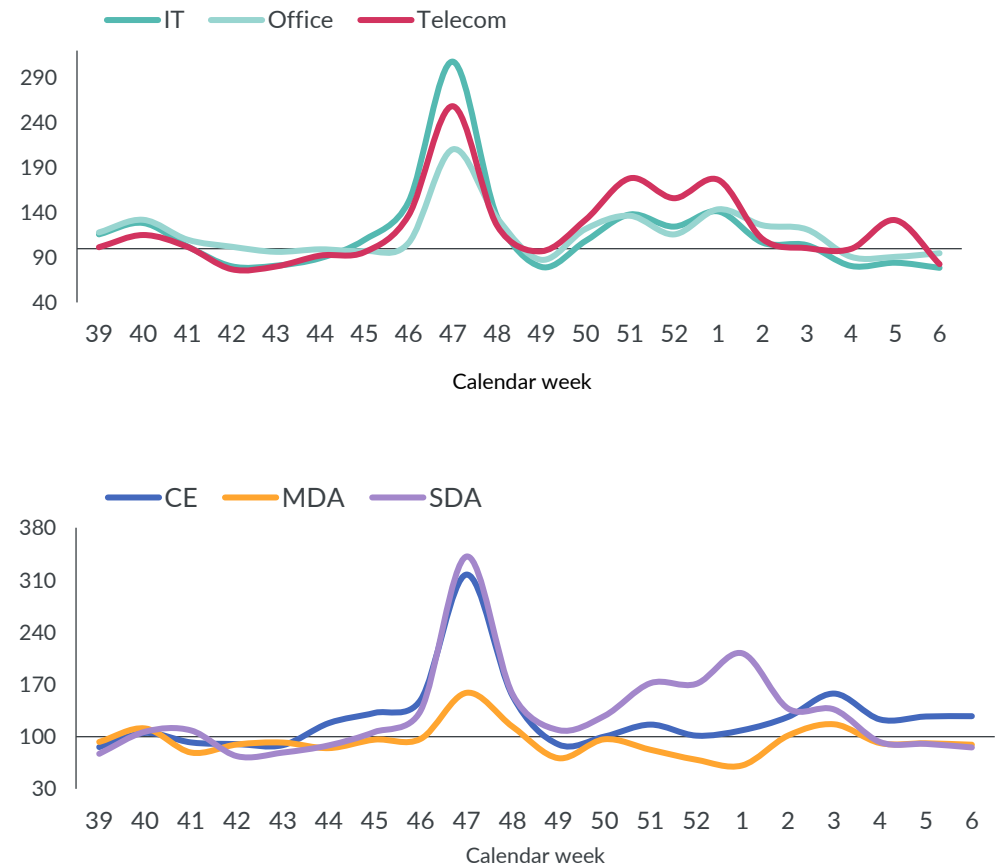
> Spain

Japan

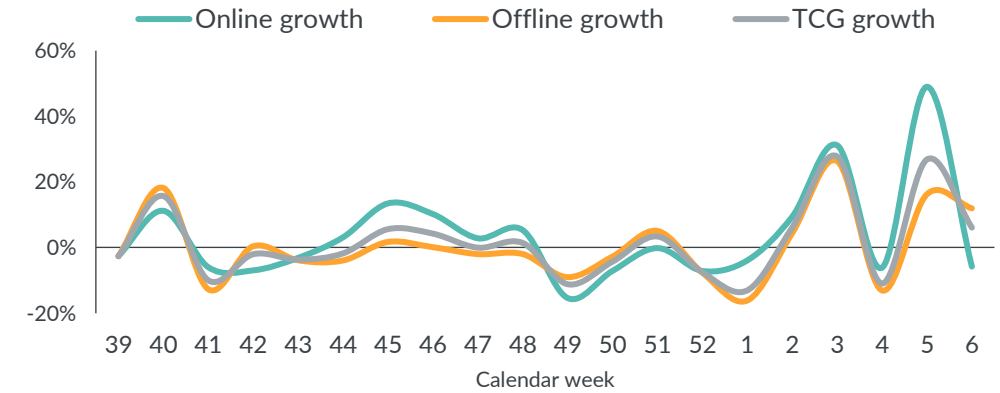
Brazil

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 06 (Feb 05 - Feb 11)



- Traditional retail experienced a plus of 12% versus week 6 in 2023, compensating for the losses of online sales at -6%. This delivered an upswing of 6% for the total TCG market.
- Within IT/Office categories, desk computing at -7% and inkjet printers at -6% were hit least. Laser printers posted -21%. Smartphones and headsets grew by 4% and 6%.
- While PTVs gained an eye-catching 44%, soundbars and audio home systems were double-digit negative. Rates for MDAs and SDAs were mixed with vacuum cleaners in pole position at +10%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 06 2024 (no comparability with 2019); 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, 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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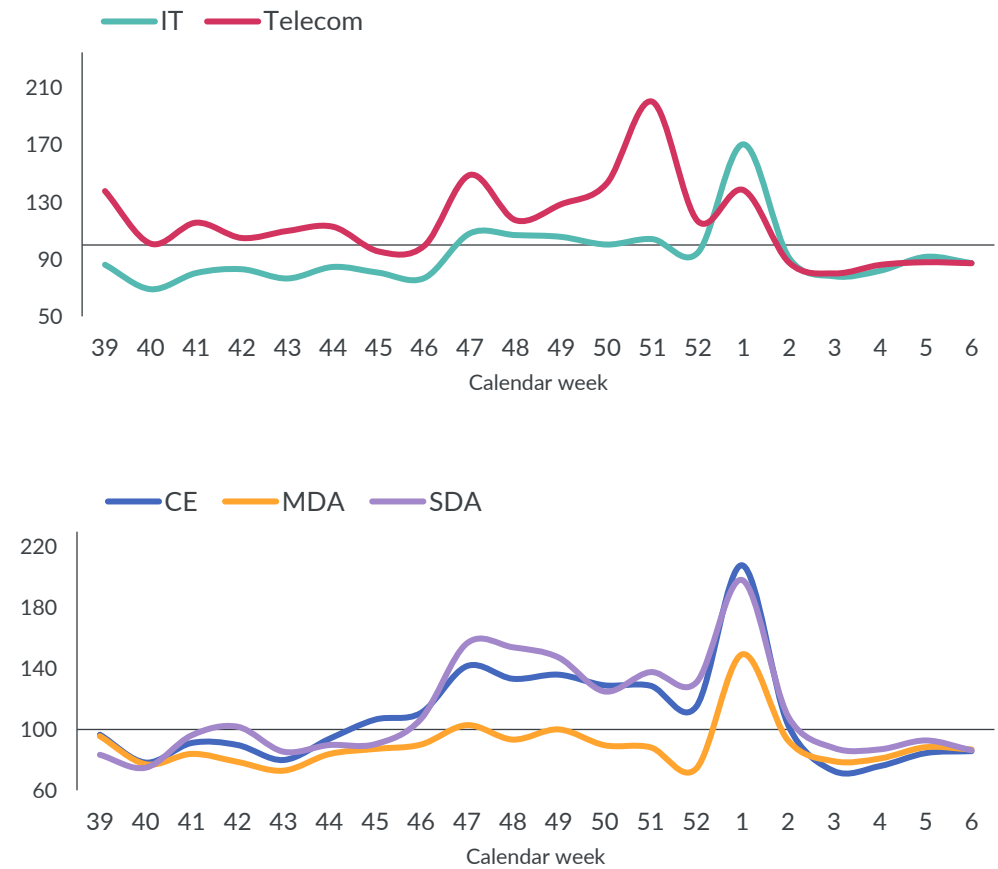
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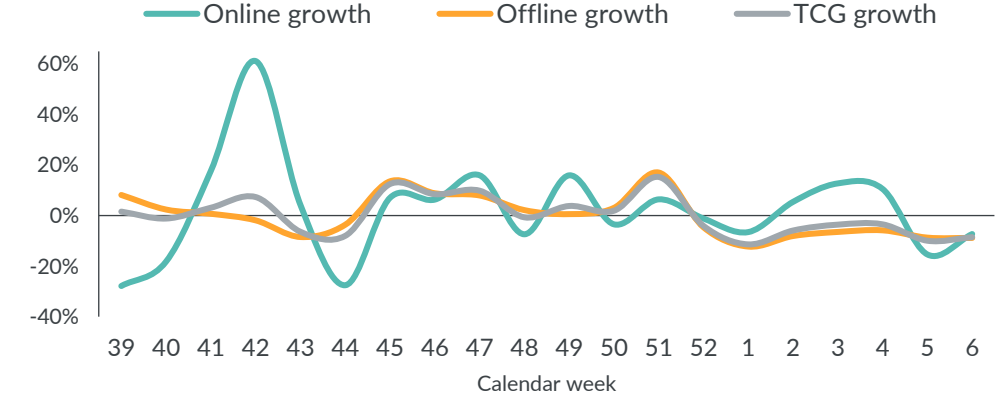
Brazil

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 06 (Feb 05 - Feb 11)



- Online sales delivered -7% but due to its small share compared with traditional sales which lost 9%, the online result could not impact the decline of 9% for the total TCG market.
- Mobile computing decelerated at -23% but media tablets performed even worse, at -33%. Smartphones lagged at -4%. Headsets were up 7%.
- Mixed trends for SDA products saw dental care in the lead at +13% and hot beverage makers come in last at -11%. MDAs lost as well, at 11%. In CE, audio home systems were the worst-performing category at -14%. TVs lagged at -4%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 06 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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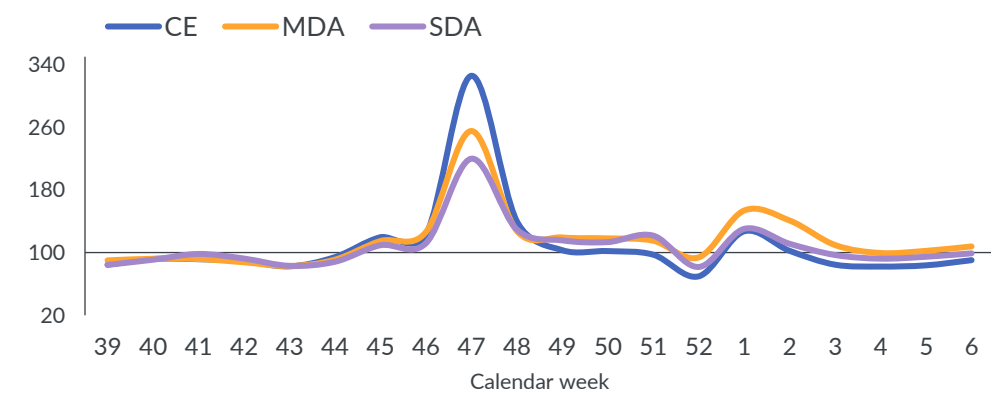
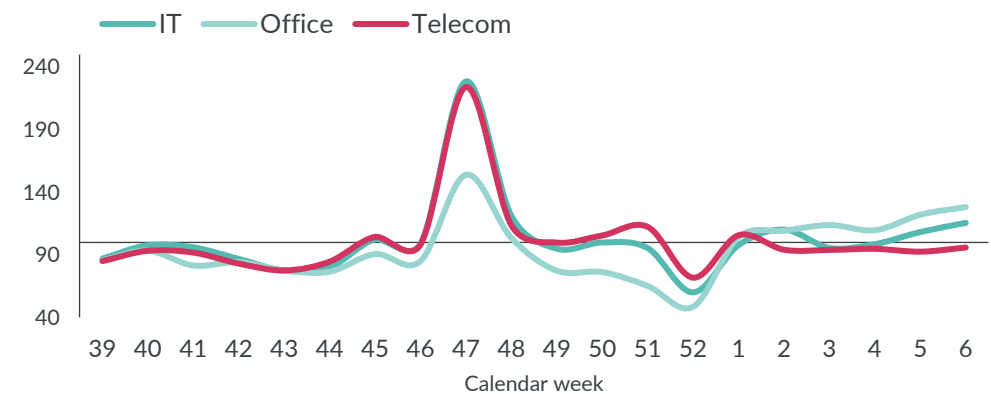
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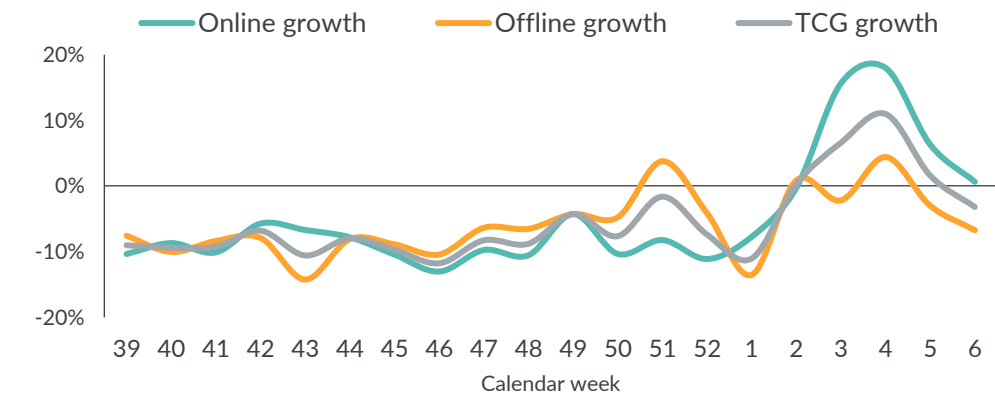
> Brazil

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 06 (Feb 05 - Feb 11)



- Online sales delivered a small increase of 1% and with traditional retail down -7%, the result was a downswing for the total TCG market of 3%.
- Media tablets at +57% were the best-performing category in week 6, while all other IT/Office categories posted negative trends, with desk computing delivering -7%. Smartphones slumped at -15%.
- Across MDA/SDA/CE, all products delivered growth, except for audio home systems at -8%. Cooling was the highlight at +18%. TVs were weak at +2%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 06 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



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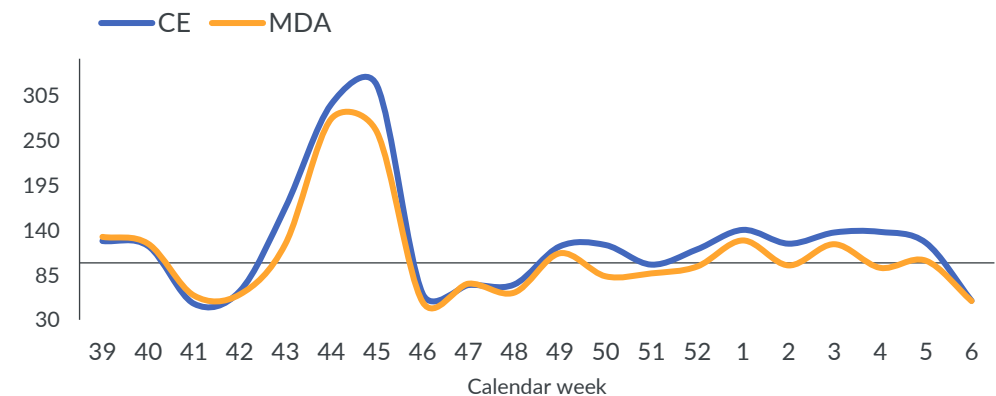
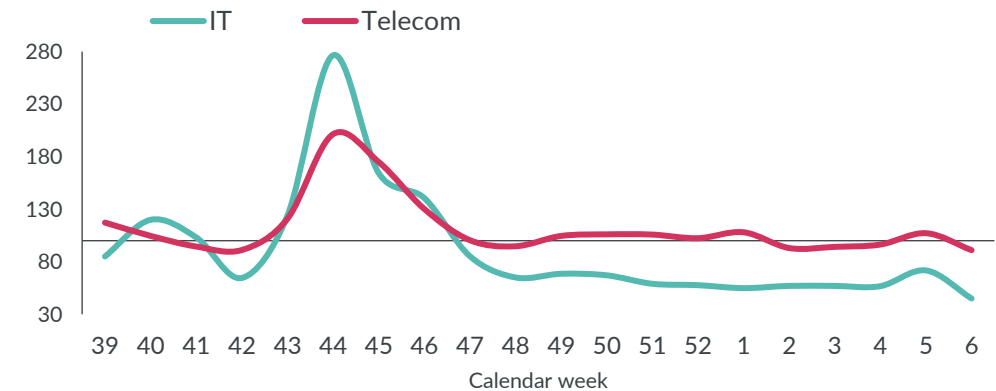
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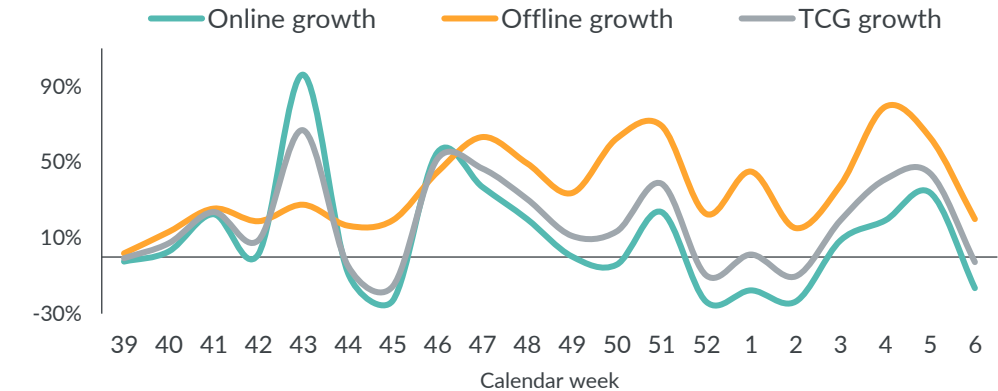
Brazil

➤ 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 06 (Feb 05 - Feb 11)



- An opposing development of traditional retail at +20% and online sales at -17% led to a small downtrend for the total TCG market of -3%.
- Mobile computing at -56% was the driving force of this development. Despite its high share in the product group basket, smartphones at +21% were unable to alter the picture.
- Washing machines, cooling, and PTV added to the weak results for total TCG by experiencing losses of more than 40% compared to the same week in the previous year.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 - 06 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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