



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 193
cw07/2024

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> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

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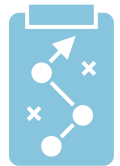
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- **gfknewron Predict** – Forecast marketing potential, build the right strategies and optimize revenue

Fact of the Week



What is moving consumers? Only 2/3rd of sales are related to the screen size – and the importance is decreasing!

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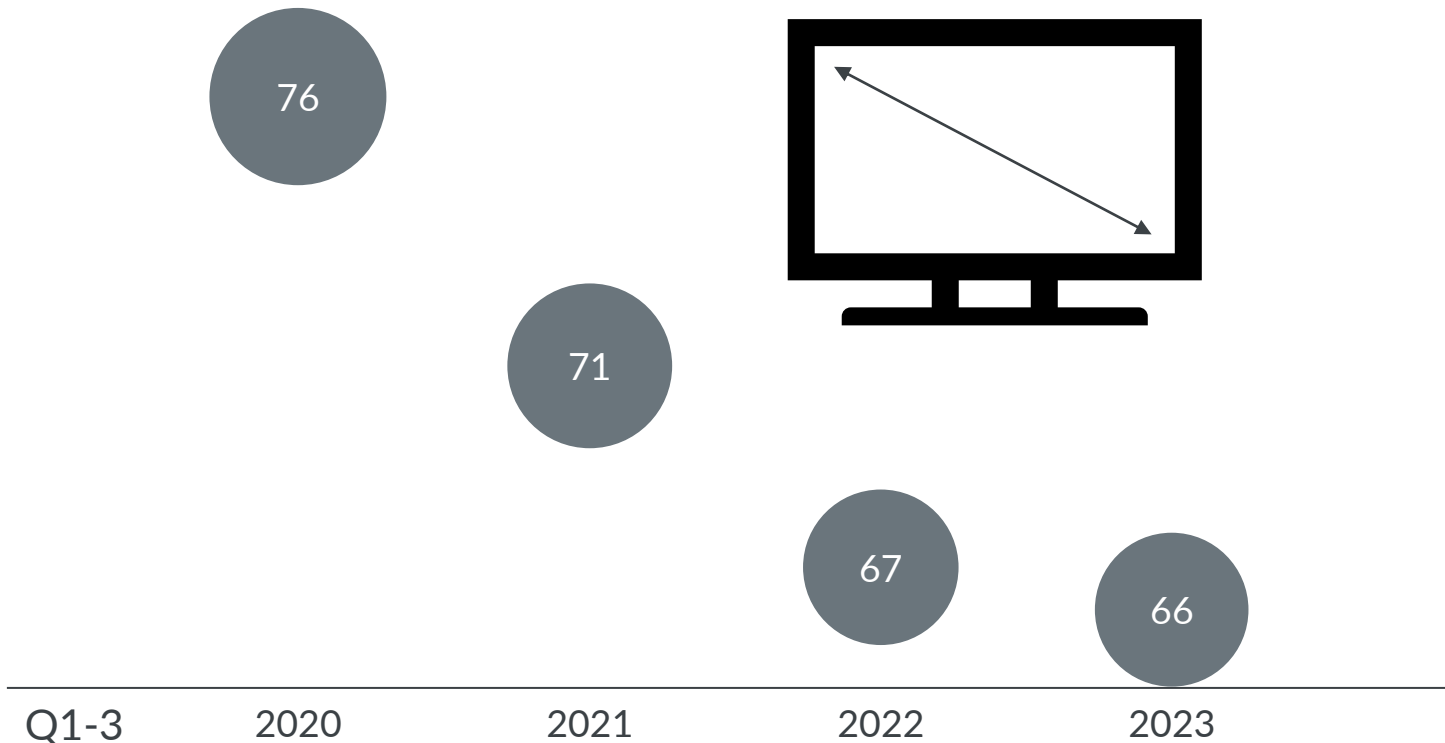
Brazil

China

Survey Question:

Which of these product design aspects were most important to your final choice?

Answer: Size of Screen - % of Sales Units



The TV market is still on a challenging journey. Saturation and changing media consumption behaviors lead to a transformation toward a premium market, while macro economics impact many consumers' wallets.

Weekly retail insights from the Point of Sale

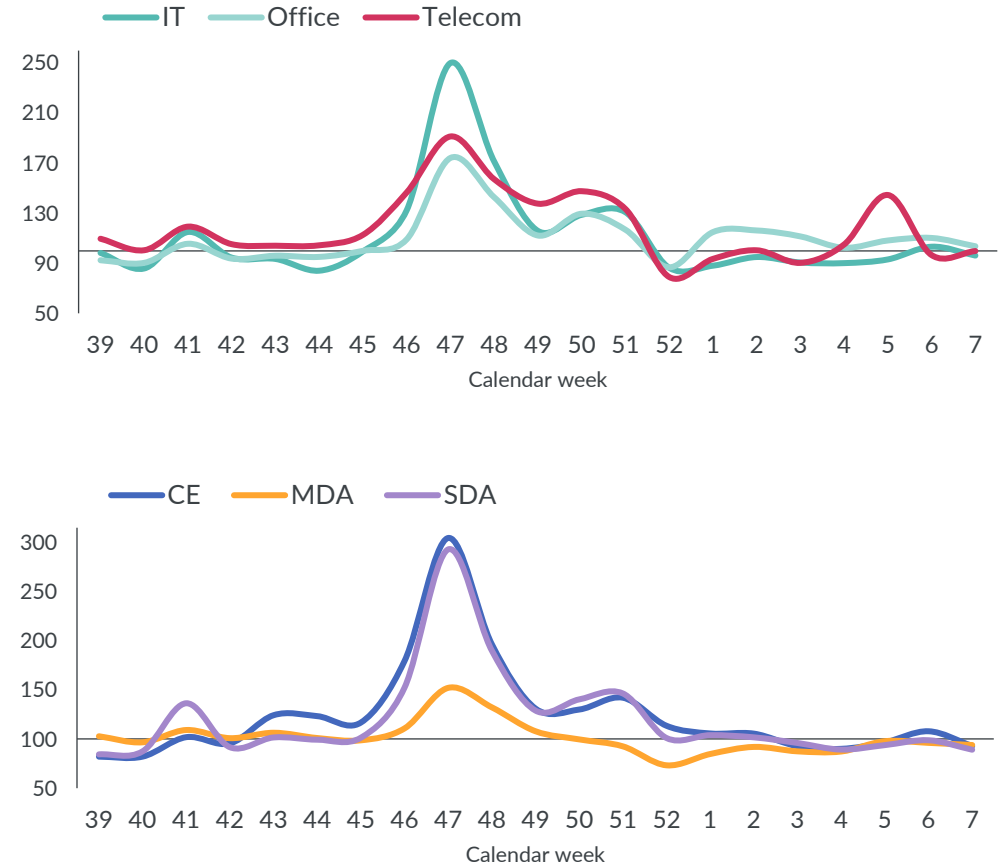
Spotlight on Germany



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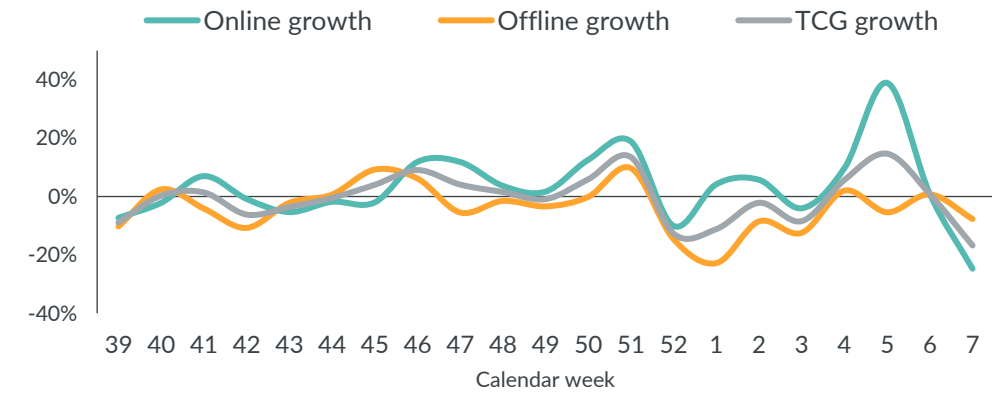
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 07 (Feb 12 - Feb 18)



- The severe drop in online sales, at -25%, can be attributed to the launch of new smartphones in week 7 in 2023 (compared to week 5 in 2024). Combined with a minus of 8% for traditional retail, this resulted in a deceleration of 17% for the total TCG market.
- While mobile computing slumped at -21%, desk computing experienced a moderate increase of 5%. Smartphones plummeted at -25%.
- CE categories were negative throughout, with soundbars in the lead at -15%. The mixed picture for MDA/SDA products saw shavers out in front at +13% and food preparation bringing up the rear at -15%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 07 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.

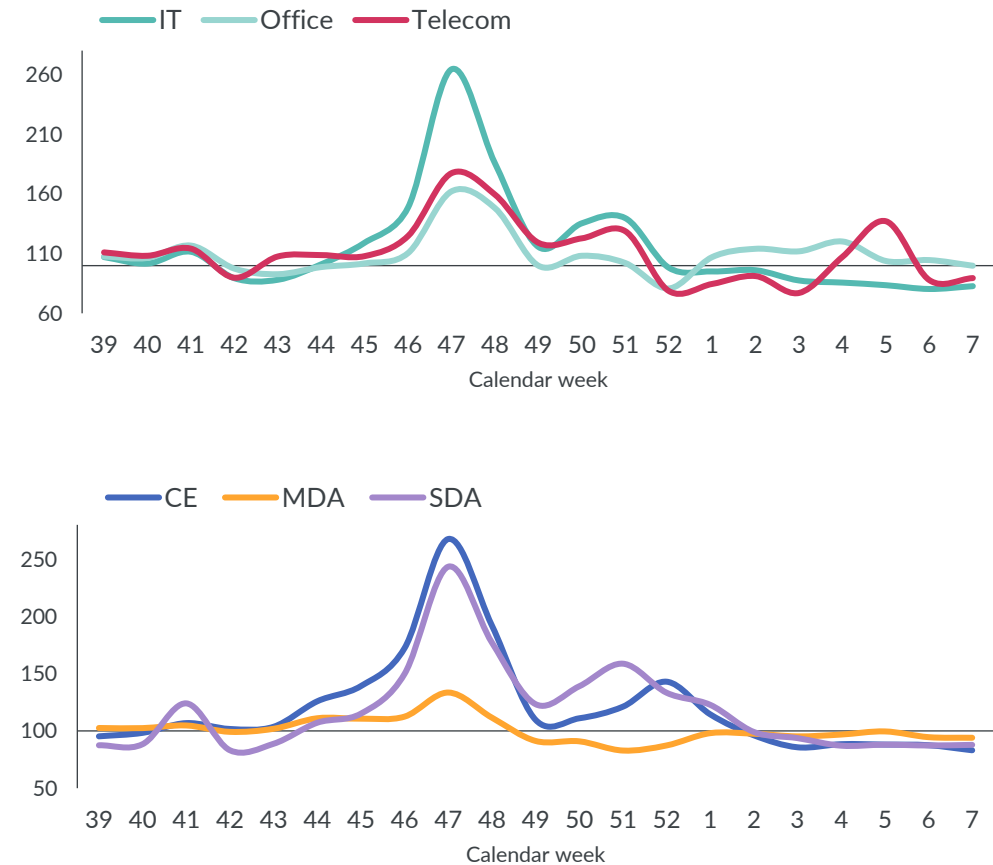
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

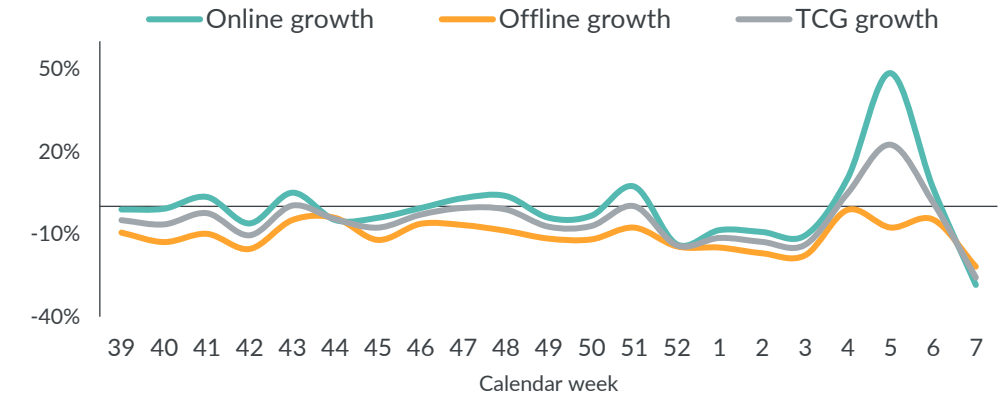


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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 07 (Feb 12 – Feb 18)

- Deceleration of online sales (-28%) dragged the total TCG market down by -26%. Traditional retail added to it by delivering -22%.
- The main drivers of this development were smartphones at -42% (new launches were two weeks earlier than in 2023). Media tablets lost 20% and laser printers were down 14%. Peripherals grew, mice at +21% and keyboards at +19%.
- Shavers and food preparation were the best-performing categories within MDA and SDA. All others grew moderately. Cooling and vacuum cleaners were flat. Soundbars and audio home systems were down -3% and -4%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 07 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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Fact of the week

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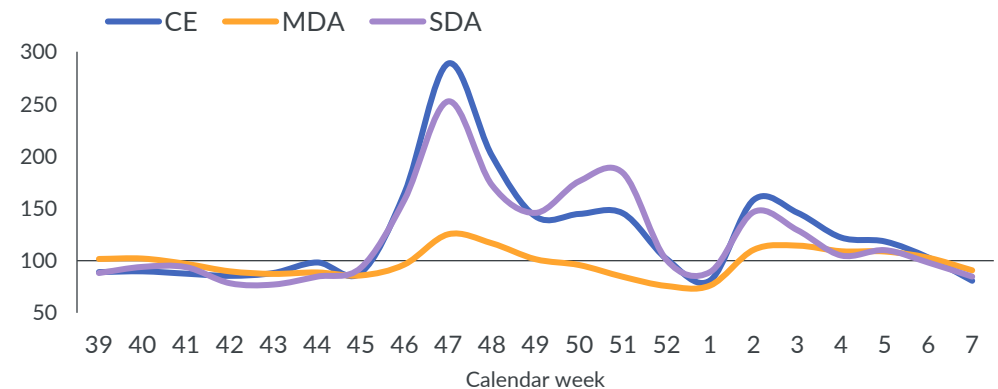
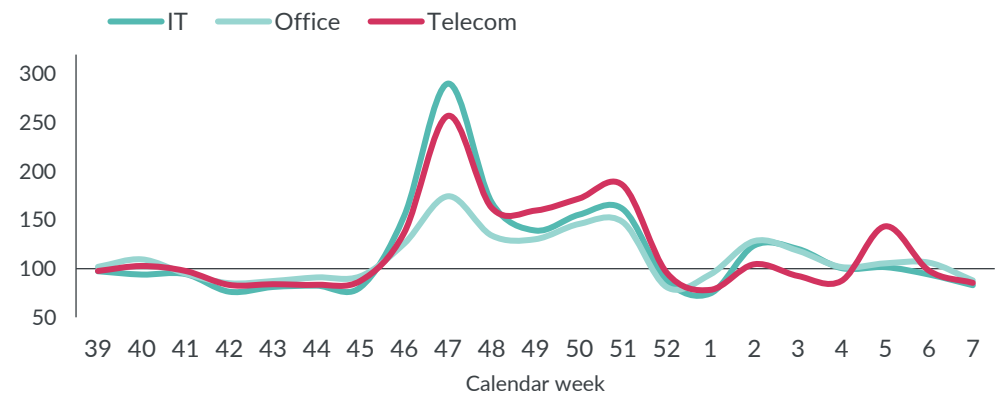
Spain

Japan

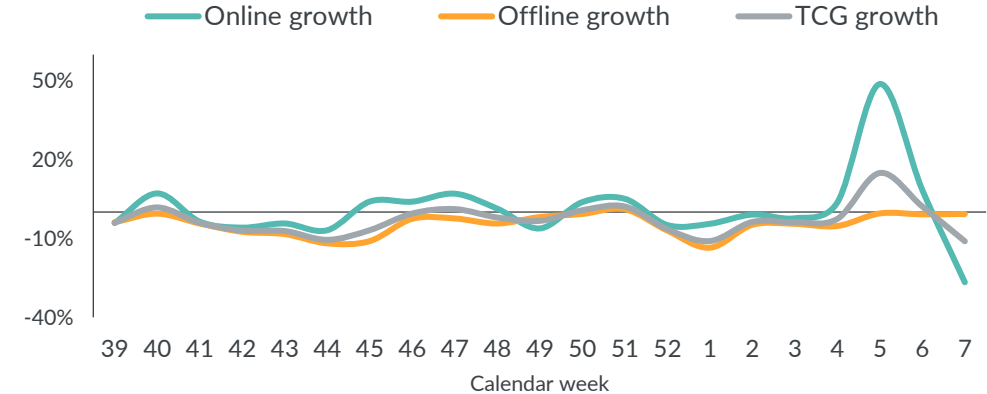
Brazil

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 07 (Feb 12 - Feb 18)



- Online sales at -27% dragged the total TCG market down by 11%. Traditional retail added to it with a slight decrease of 1%.
- Smartphones were the worst-performing product group in week 7 (-36%). Laser printers claimed second place at -29%. Peripherals made good increases, at +20% and +17% for mice and keyboards; monitors gained ground at +24%.
- While CE products posted negative trends (PTV down by 4% and soundbars by 17%), MDAs and SDAs saw diverging trends with dental care gaining 53% and air treatment lagging at -6%. Food preparation was flat.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 07 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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Germany

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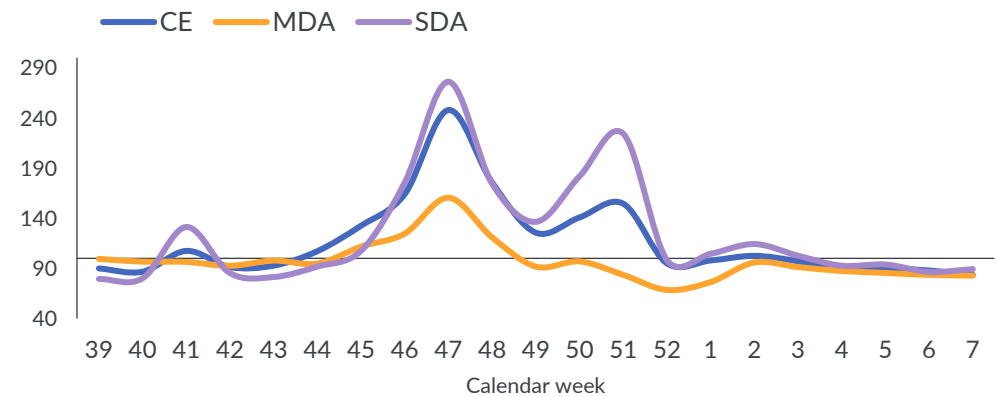
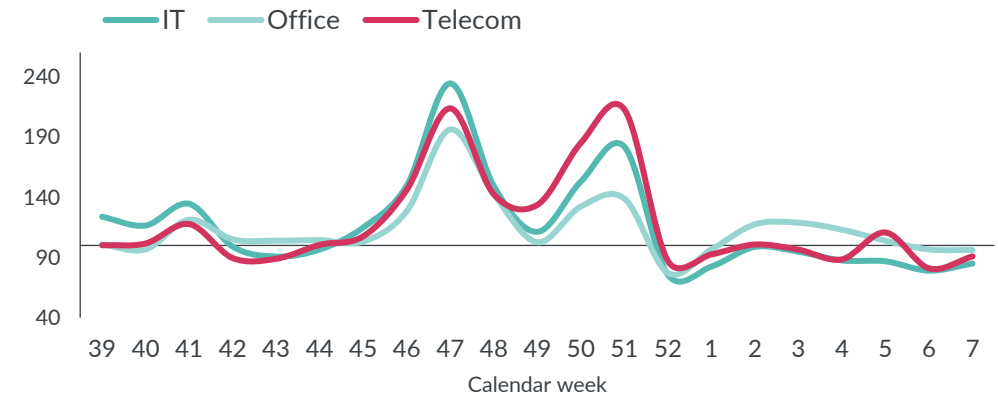
Spain

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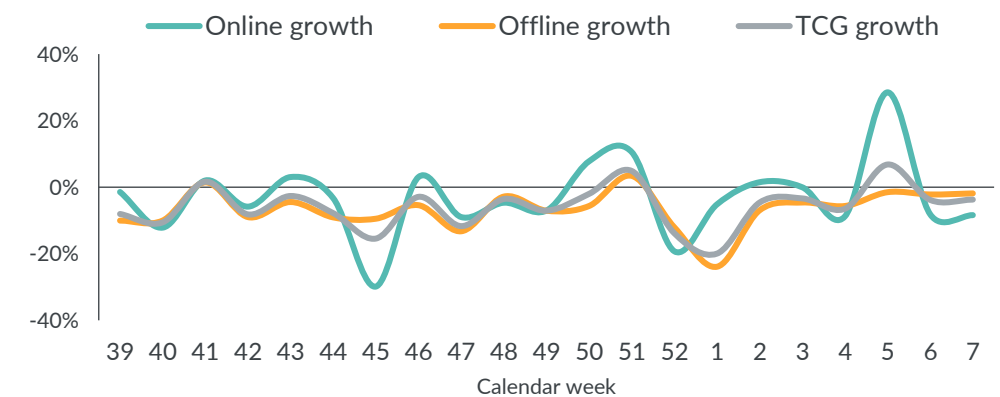
Brazil

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 07 (Feb 12 - Feb 18)



- Deceleration of online sales (-8%) dragged the total TCG market down by -4%. Traditional retail added to it by delivering -2%.
- All IT/Office and telecom products experienced negative trends, ranging from -14% for inkjet printers to -4% for laser printers. The exception was media tablets at +19%. Smartphones lagged at -6%.
- CE products lost in solid double-digits, with PTV down by 10%. Except for cooling at -2%, all MDA and SDA categories experienced growth. Air treatment took the lead at +39% and dental care and hot beverage makers claimed second and third places, at +19% and +17% respectively.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 - 07 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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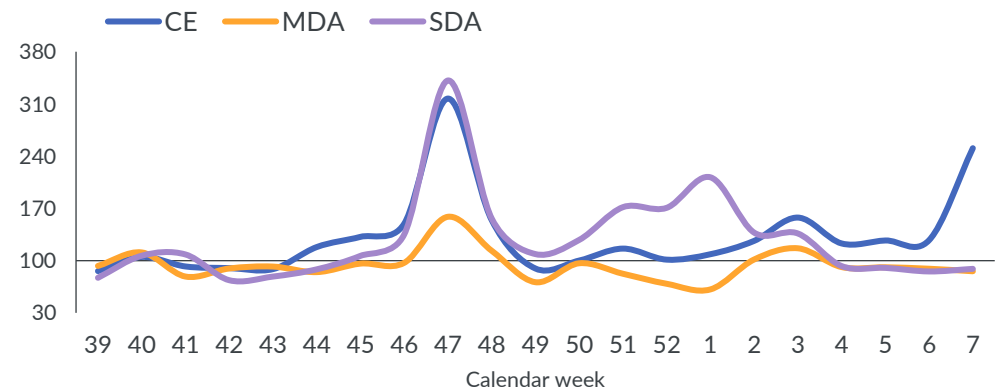
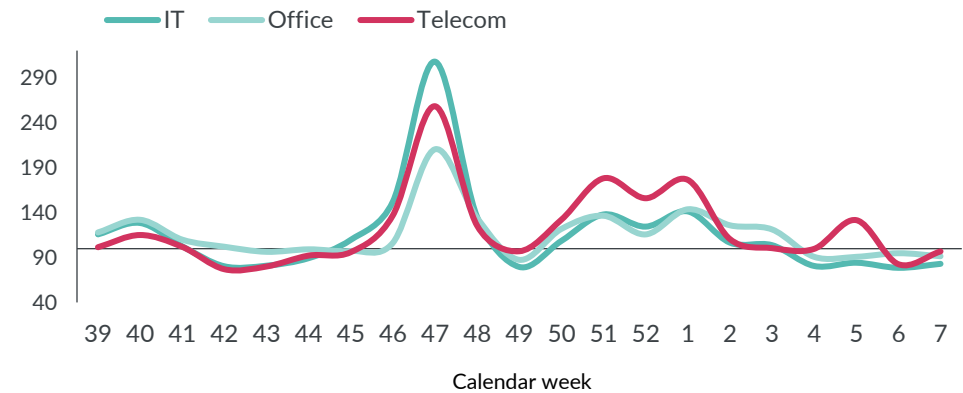
➤ Spain

Japan

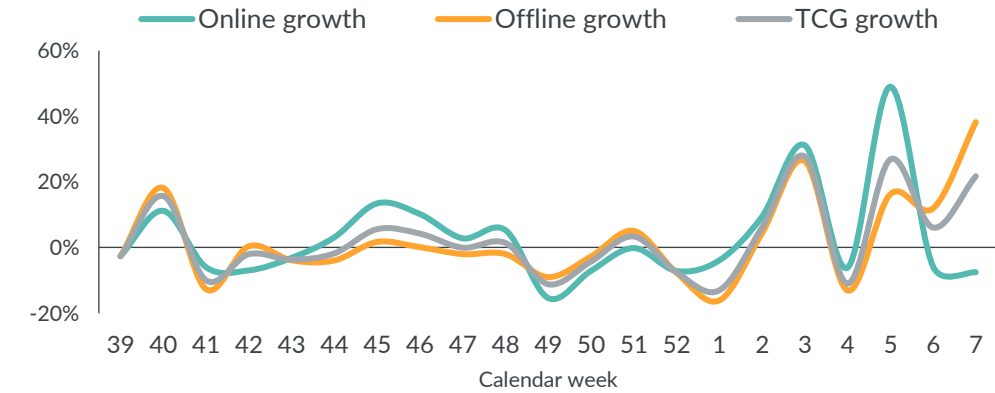
Brazil

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 07 (Feb 12 - Feb 18)



- Traditional retail experienced an eye-catching increase of 38% which compensated for the minus of 7% for online sales, leaving the total TCG market at a solid plus of 22%.
- The driving force of this development was PTV at +213%. Most of this was replacement purchases as only high definition will be broadcasted, older SD TVs will not work anymore. MDAs were down by 10% while SDAs posted growth, with hot beverage makers in the lead at +19%.
- The worst-performing product groups were smartphones and laser printers, at -25%.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 07 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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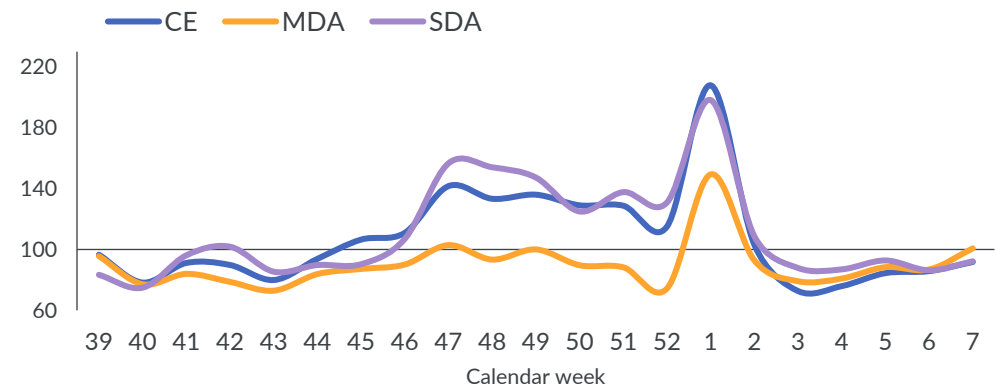
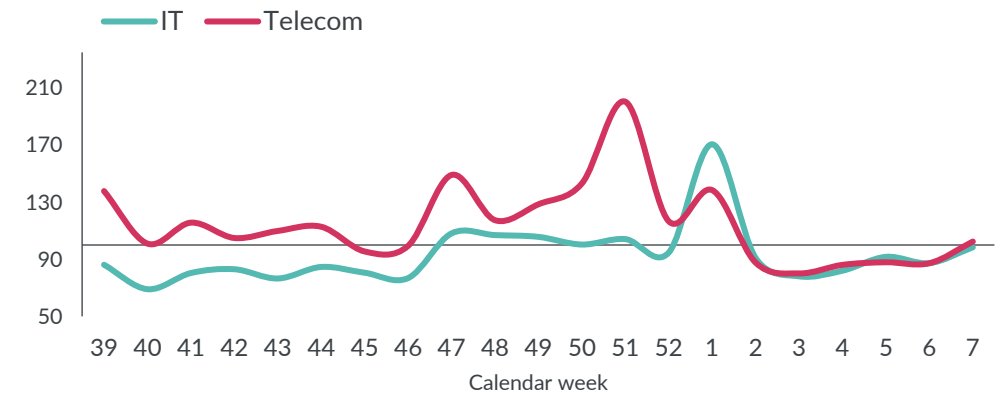
Spain

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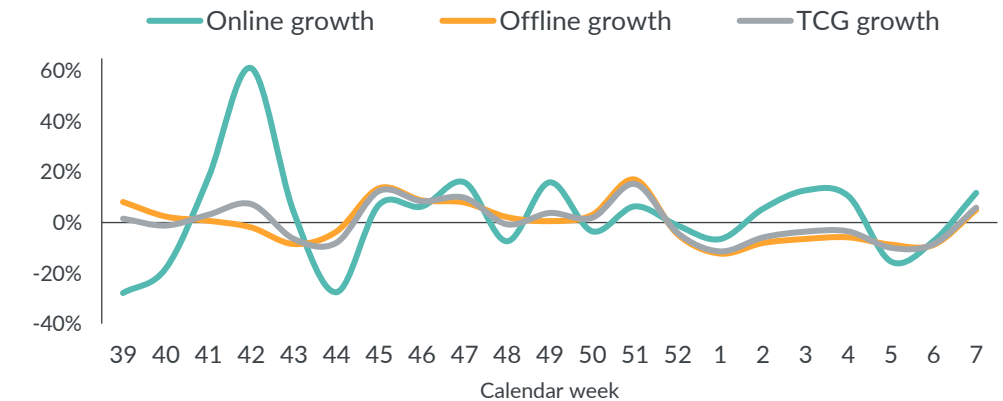
Brazil

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 07 (Feb 12 – Feb 18)



- Both online sales at +12% and traditional retail at +5% lifted the total TCG market by 6%.
- While mobile computing and media tablets decelerated at -3% and -8% respectively, smartphones and headsets experienced solid growth of 13% and 24%.
- Mixed trends for SDA products saw dental care and shavers in the lead at +22% and hot beverage makers last at -14%. MDAs were mixed as well, with washing machines posting +7% and cooling declining by 3%. In CE, soundbars declined by 11% while TVs gained 6%.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 07 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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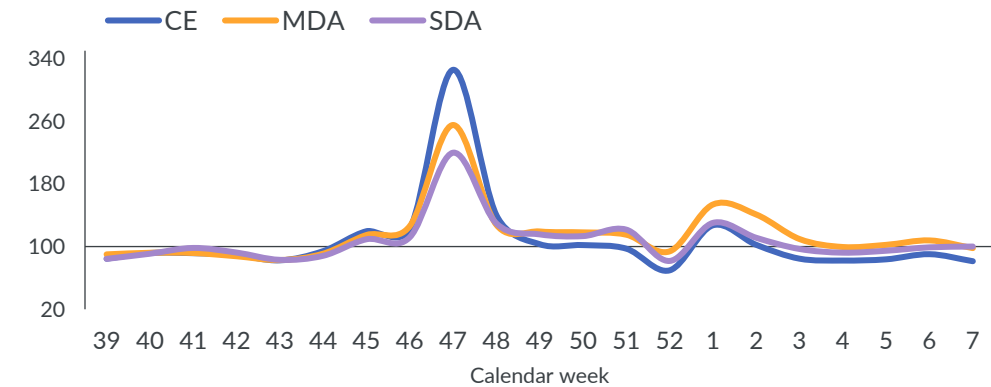
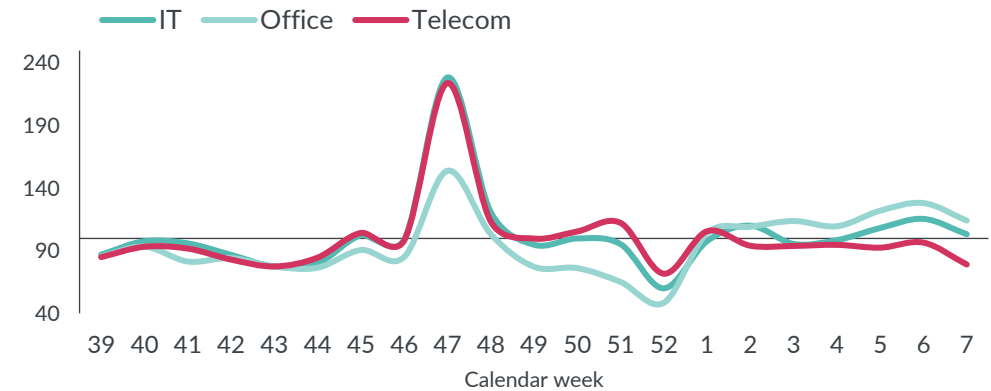
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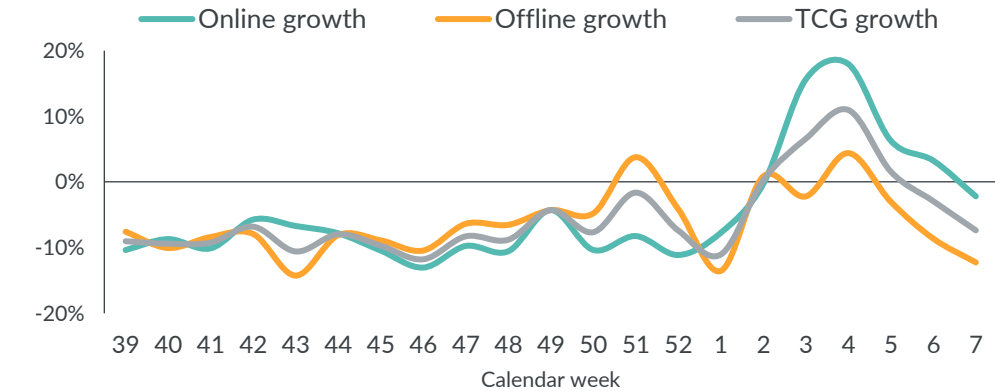
➤ Brazil

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 07 (Feb 12 - Feb 18)



- Online sales delivered -2% and with traditional retail down -12%, the result was a downswing for the total TCG market of 7%.
- Media tablets at +33% were the best-performing category in week 7 and inkjet printers at +6% claimed second place. The other IT/Office categories posted negative trends, with laser printers delivering -12%. Smartphones slumped at -22%.
- Among MDA/SDA/CE products, only audio home systems (-27%) and TVs (-0.8%) delivered negative trends. At +19%, vacuum cleaners took the lead. Cooling was next at +12%.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 07 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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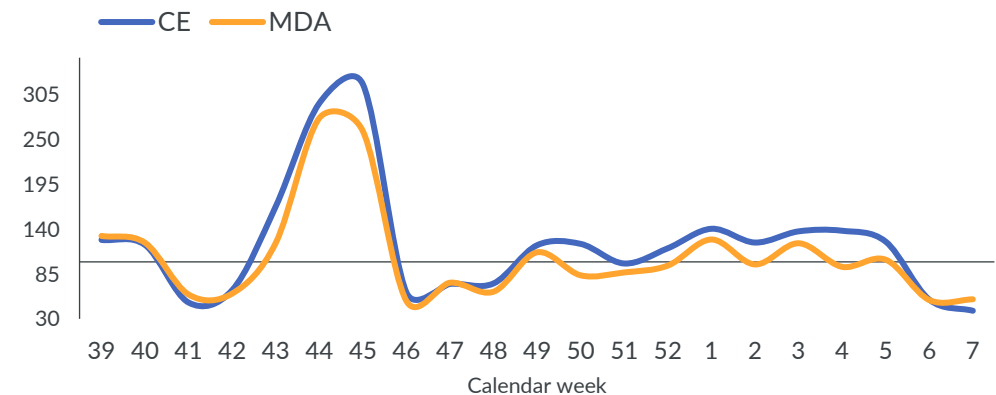
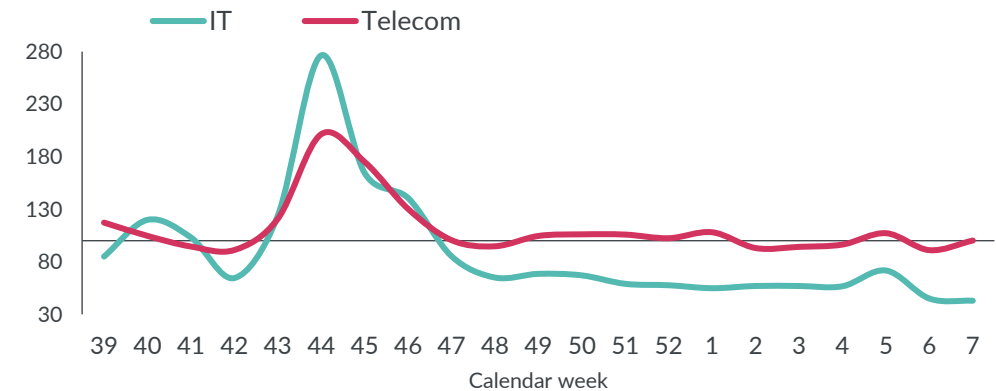
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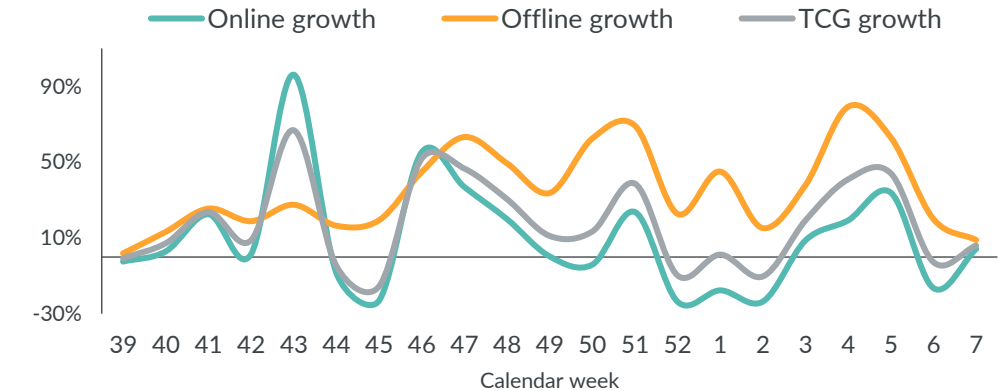
Brazil

➤ 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 07 (Feb 12 - Feb 18)



- Moderate growth for both distribution types – online sales at +4% and traditional retail at +9% – drove an upswing of the total TCG market of 6%.
- Smartphones at +29% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing delivered a minus of 53%.
- Washing machines, cooling, and PTV recovered slightly from the severe losses in week six of more than 40%. In week seven, these delivered rates of -39% for PTV, -32% for washing machines and -29% for cooling.

Source: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 07 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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