



An NIQ
Company

State of consumer technology and durables sales tracker

Weekly trends and insights for
the tech and durables market

Edition 195
cw09/2024

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Simplify your data analysis journey

Quick, comprehensive, and accessible business insights



> About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

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In an era where market fluctuations are the norm, having a finger on the pulse of weekly changes is crucial. **gfknewron** offers more than just data; it provides clarity and direction in a sea of information so you can act based on the most current facts.

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Get instant access to crucial data to empower your decisions.



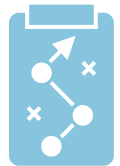
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- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
- **gfknewron Consumer** – Understand your shoppers, reach the right audience and maximize ROI
- **gfknewron Predict** – Forecast marketing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

Fact of the Week

H&L sectors above pre-pandemic levels except for lighting due to longer replacement cycles



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> Fact of the week

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Great Britain

France

Italy

Spain

Japan

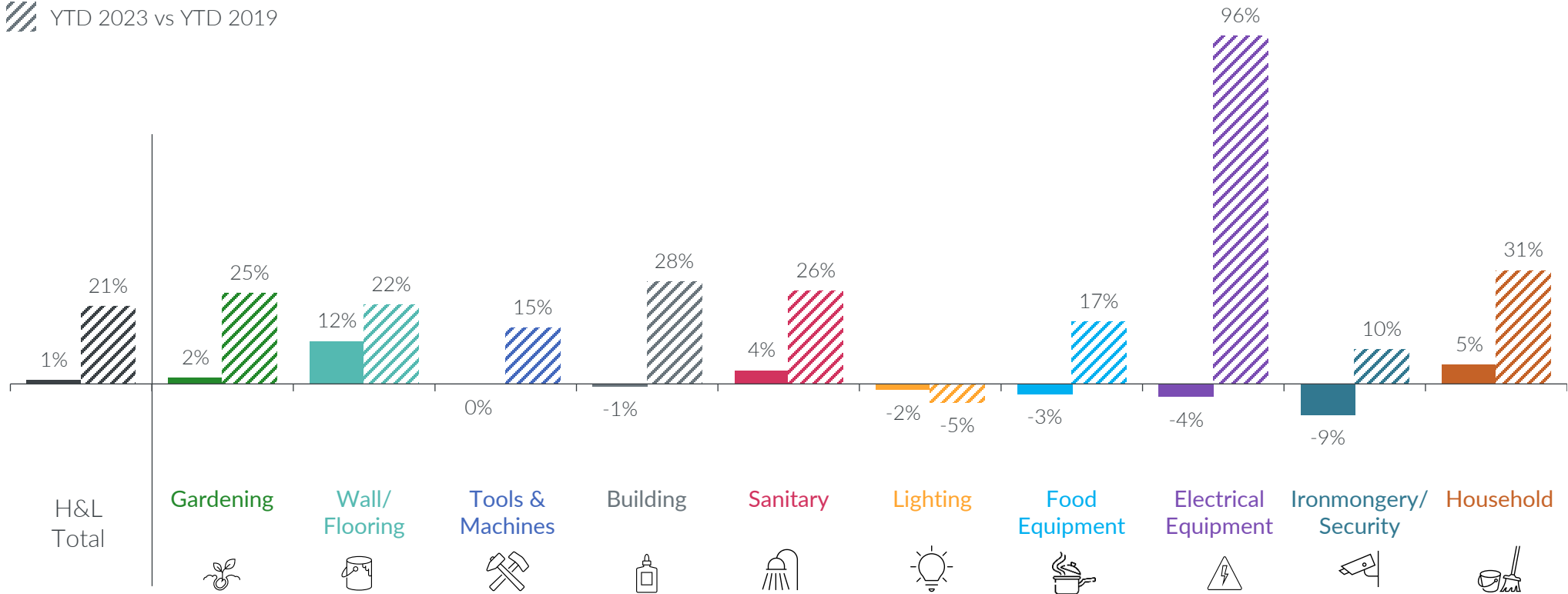
Brazil

China

Home & Living | Sales Value EUR | Growth rate PY | January – October

■ YTD 2023 vs YTD 2022
▨ YTD 2023 vs YTD 2019

High revenues from 2021/2022 continued to stabilize, with revenue growing +1% YTD. Volume, whilst still slightly below pre-pandemic levels, showed signs of stabilization.



Source : GfK Market Intelligence, Sales Tracking; Panelmarket incl. wholesale, All countries

Weekly retail insights from the Point of Sale

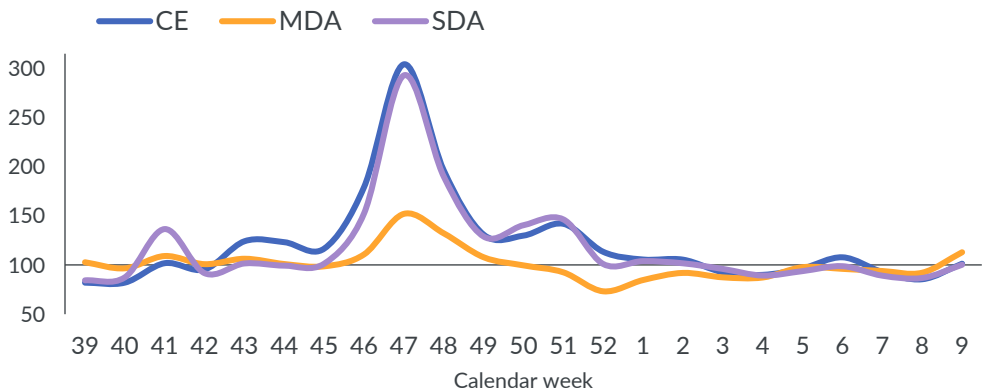
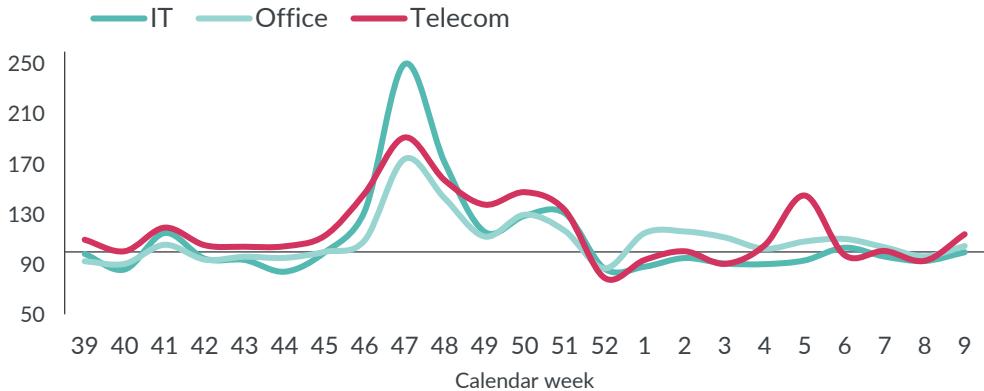
Spotlight on Germany



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

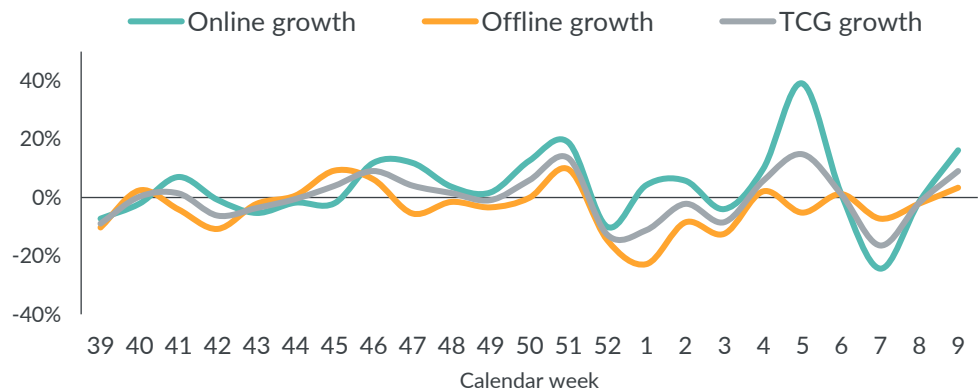
Please note: Below lines depict a sales index vs an average 2023 week. Above average **absolute** sales are shown as >100 (≠ growth rate vs same week 2023).

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 09 (Feb 26 – Mar 03)



- The good recovery of both distribution types, online sales at +16% and traditional retail at +3%, led to an upswing of 9% for the total TCG market.
- Except for monitors at +4%, all other IT/Office products delivered negative trends, ranging between -5% for mobile and desk computing to -12% for printers. Smartphones experienced a value increase of 18%.
- CE categories were negative throughout, with soundbars posting -11%. In week 9, food preparation caught up and posted +52%. Dental care, cooling, and washing machines also saw double-digit pluses. The only decreasing categories were air treatment at -10% and vacuum cleaners at -5%.

Source: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 09 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.

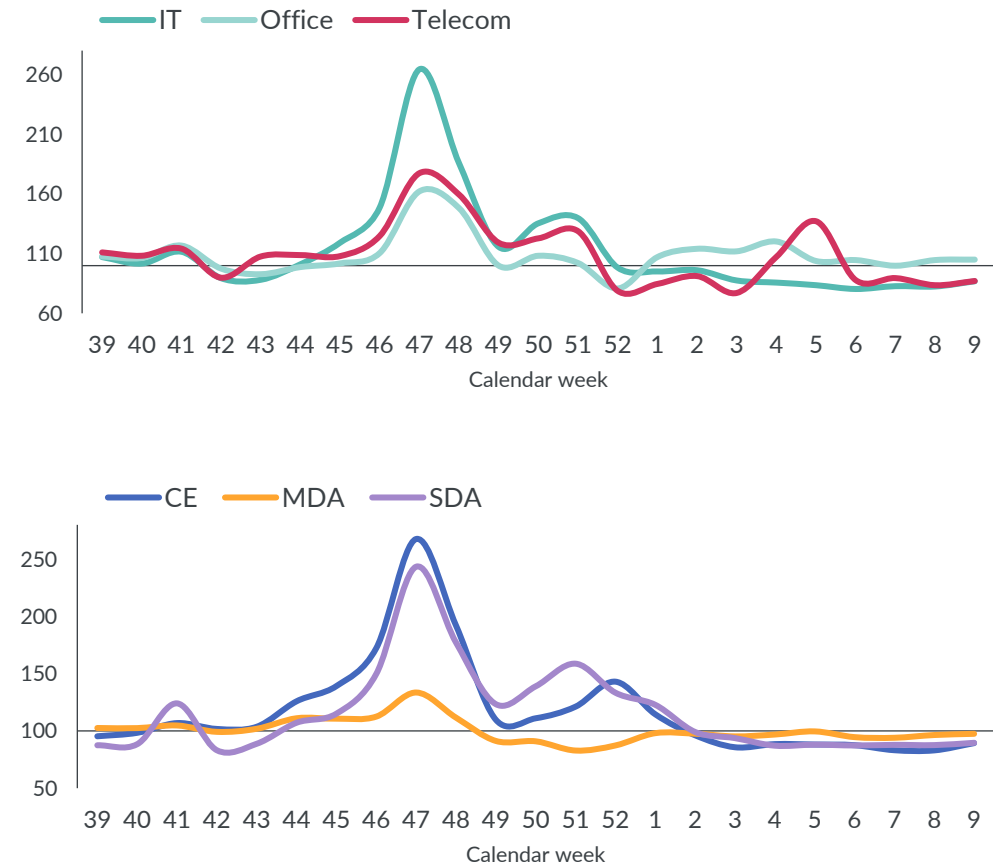
Weekly retail insights from the Point of Sale

Spotlight on Great Britain

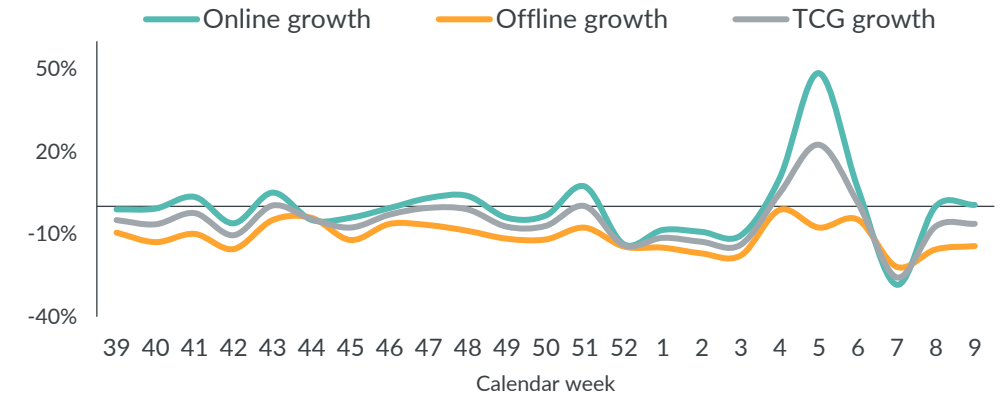


- About **gfknewron**
- Fact of the week
- Germany
- > Great Britain
- France
- Italy
- Spain
- Japan
- Brazil
- China

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 09 (Feb 26 - Mar 03)

- Deceleration of traditional retail (-14%) dragged the total TCG market down by -6%. Online sales at +1% was not able to compensate.
- The main drivers of this development were smartphones at -13%. Media tablets lost 19%. Peripherals grew, mice at +19% and keyboards at +22%. Mobile computing was flat.
- Hot beverage makers and food preparation were the best-performing categories within MDA and SDA, at +12% and +11%. All others grew moderately. Cooling was flat. While TVs posted a plus of 2%, audio home systems slumped at -14%.

Source: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 09 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

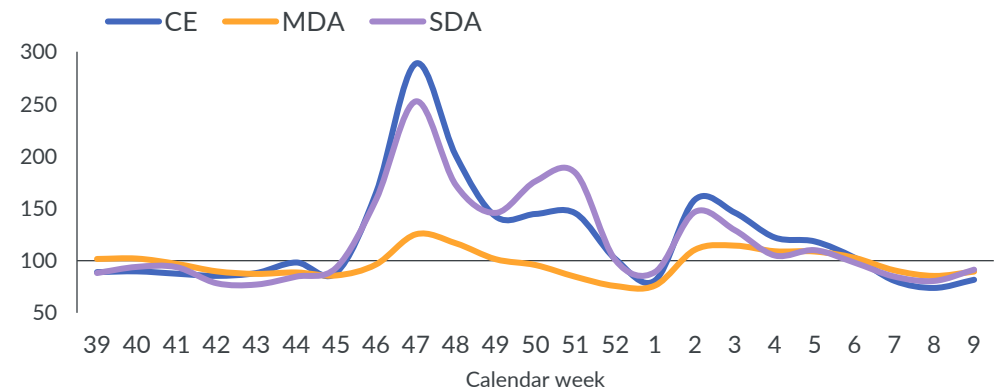
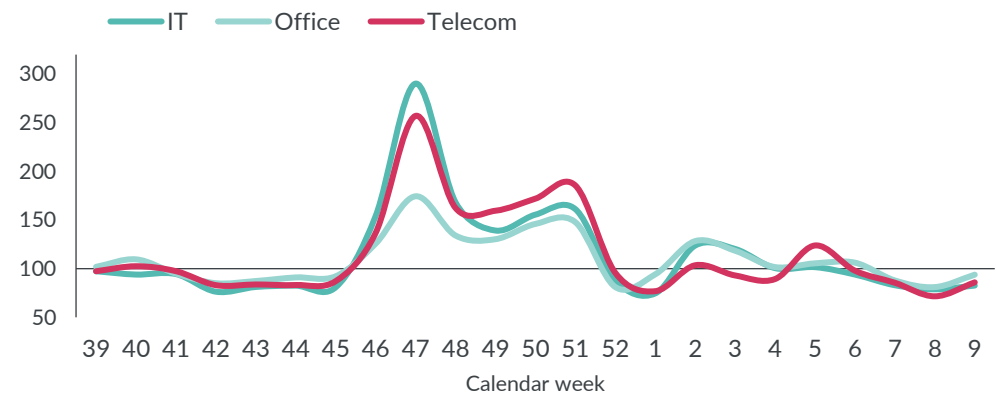
Spain

Japan

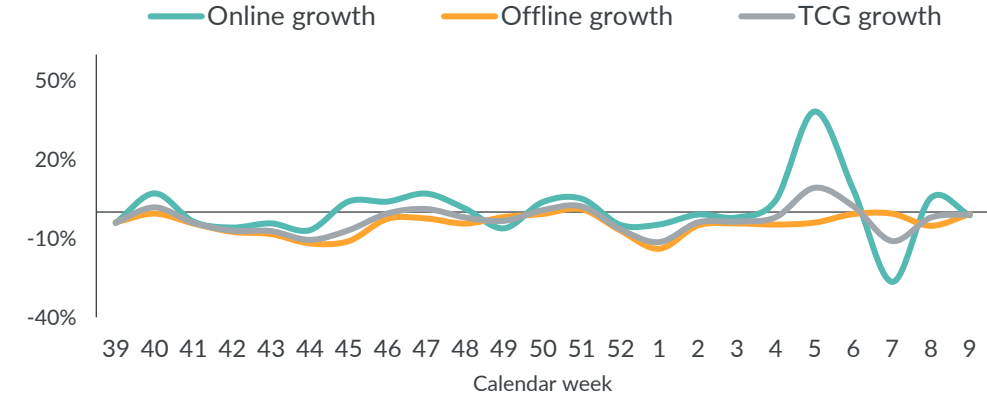
Brazil

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 09 (Feb 26 - Mar 03)



- At an identical rate of -1%, both traditional retail and online sales retail dragged the total TCG market down by -1%.
- Laser printers were the worst-performing product group in week 9 (-29%). Inkjet printers claimed second place at -13%. Mice made good increases, at +12%. All other IT/Office categories saw moderate ups and downs. Smartphones lagged at -1%.
- While MDAs posted slight negative trends, SDA categories experienced a mix, with dental care out in front at +17% and air treatment at -5% bringing up the rear. TV dropped by 2%.

Source: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 09 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

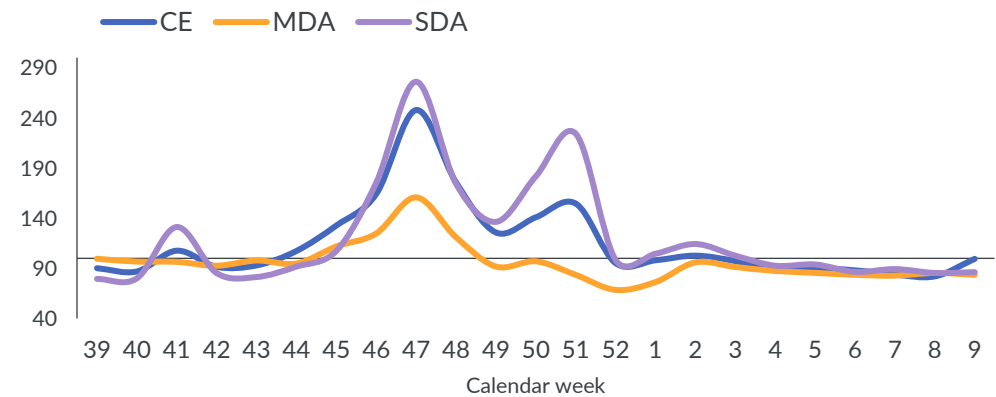
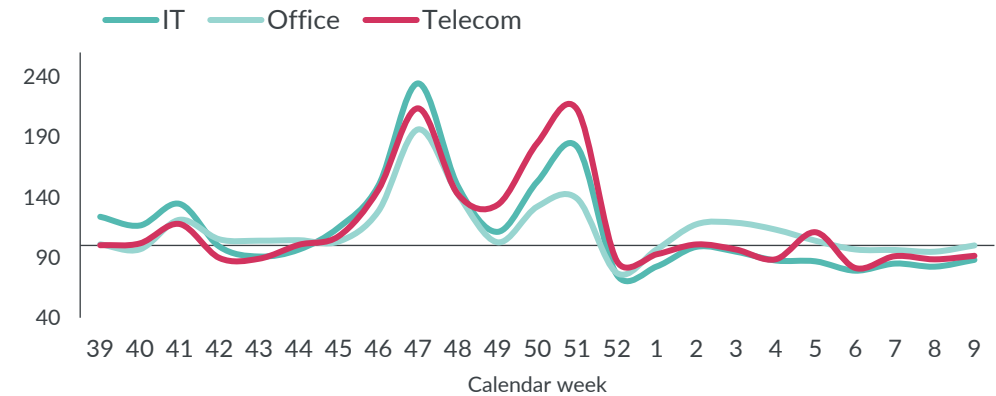
Spain

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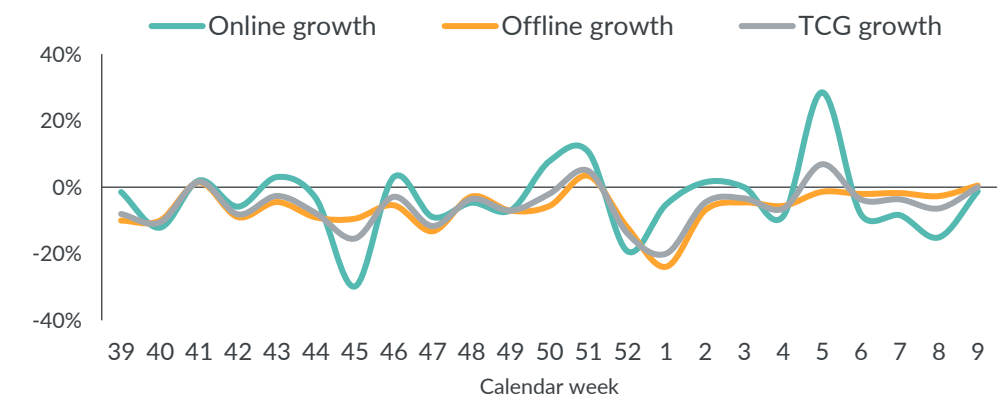
Brazil

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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 09 (Feb 26 - Mar 03)



- Online sales (-1%) and traditional retail (+1%) delivered an opposing development to each other, which resulted in a flat total TCG market.
- All IT/Office products experienced negative trends, ranging from -2% for media tablets to -22% for laser printers. Smartphones accelerated at +10%.
- In week 9, air treatment took the lead at +49%. The other MDA and SDA categories ranged from +6% for hot beverage makers to -10% for cooling. While audio home systems lost 21% and sound bars were down 5%, TVs stood their ground and delivered +0.3%.

Source: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 - 09 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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France

Italy

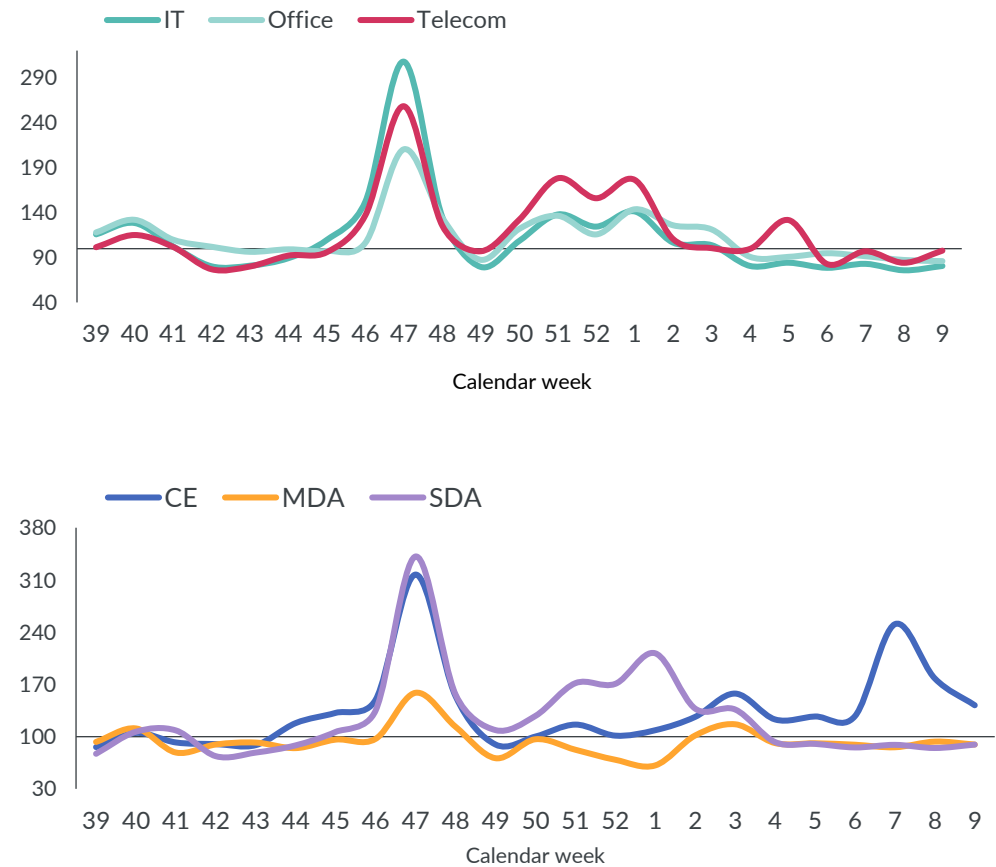
➤ Spain

Japan

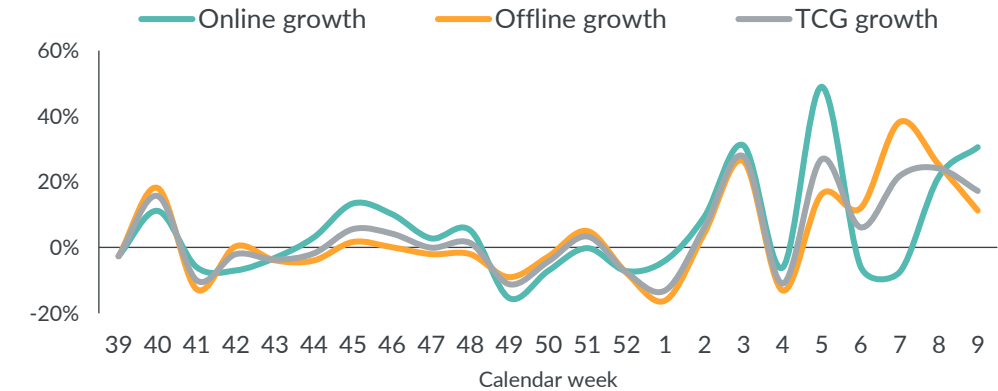
Brazil

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 09 (Feb 26 – Mar 03)



- Acceleration of online sales at +31% lifted the total TCG market to a plus of 17%. Traditional retail added to it by delivering +11%.
- The driving force of this development was PTV at +61%. Most of this was replacement purchases as only high definition will be broadcast, older SD TVs will no longer work. Audio home systems were down by 18%. The mixed picture for MDA/SDA products saw hot beverage makers (+15%) in the lead, and cooling (-3%) at the other end of the scale.
- Smartphones recovered from -25% in week 7 to +25% in week 9. Except for media tablets at +21%, all other IT/Office categories slumped in double-digits.

Source: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 09 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

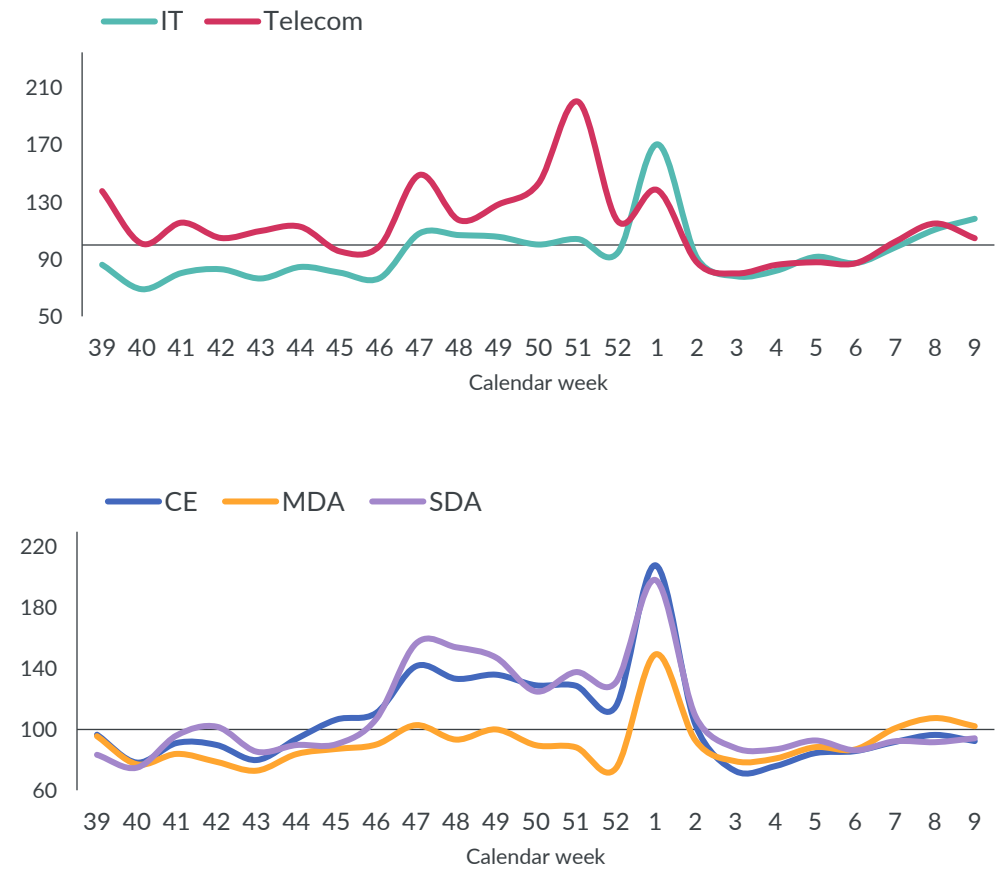
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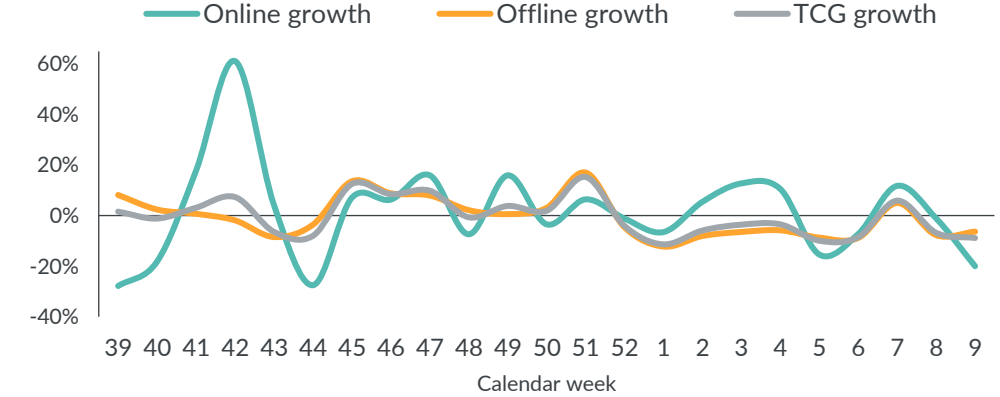
Brazil

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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 09 (Feb 26 - Mar 03)



- Online sales delivered -20% and with traditional retail down -6%, the result was a downswing of the total TCG market of 9%.
- While mobile computing lagged at -10%, media tablets experienced a slight uplift of 3%. Smartphones decelerated at -16%. Headsets were up 6%.
- Except for shavers at +3%, all other MDA/SDA/CE products delivered negative trends, ranging from -2% and -3% for vacuum cleaners and dental care to -18% and -22% for air treatment and soundbars.

Source: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 - 09 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

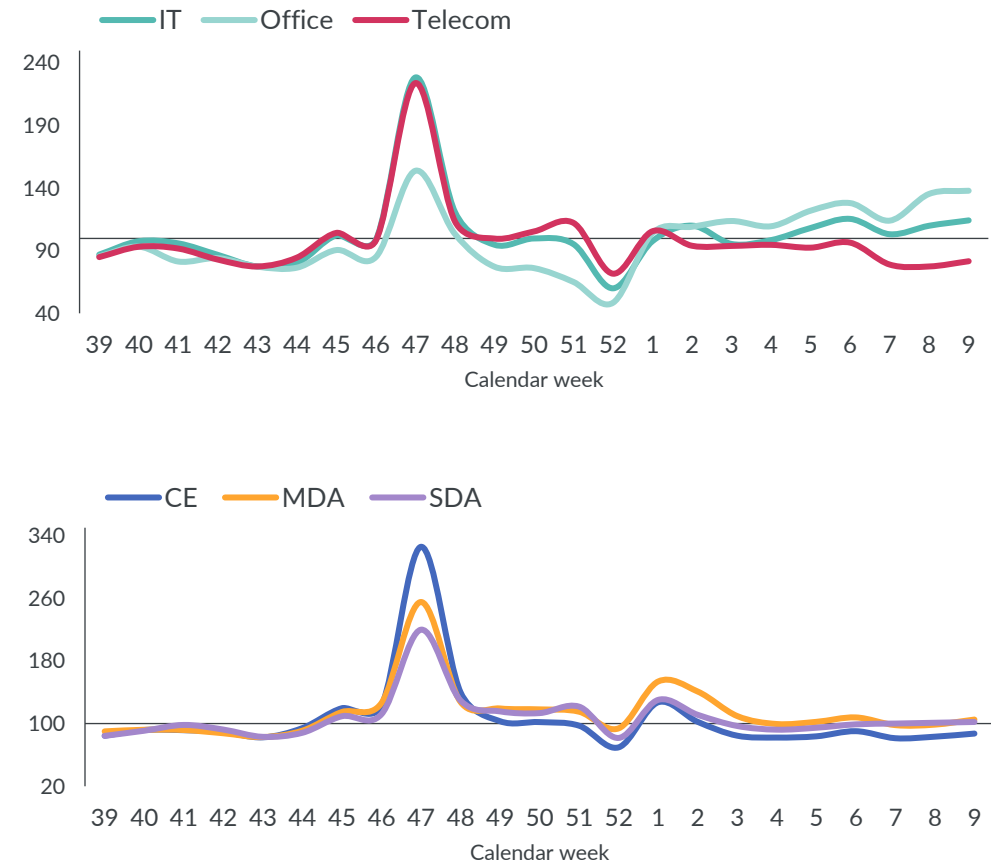
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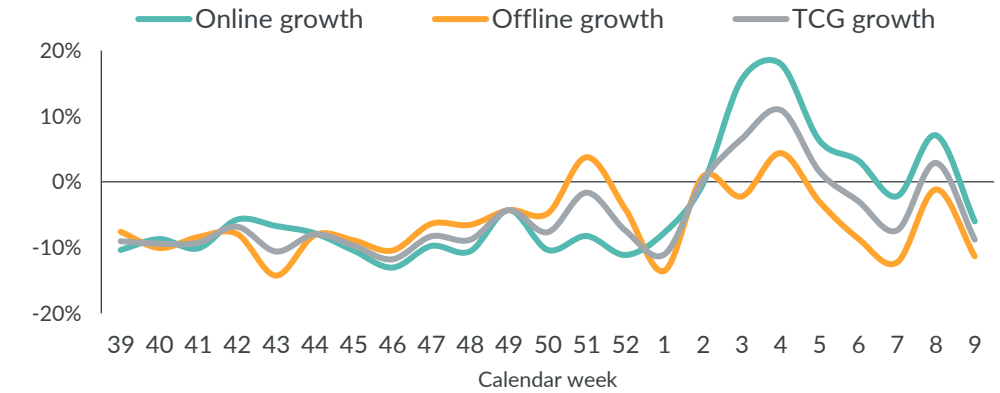
> Brazil

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 09 (Feb 26 – Mar 03)



- Online sales delivered -6% and with traditional retail down -11%, the result was a downswing for the total TCG market of 9%.
- Media tablets at +23% were the best-performing category in week 9. Laser printers were up 5%. The other IT/Office categories posted negative trends, with mobile computing delivering -11%. Smartphones slumped at -22%.
- MDAs delivered growth with cooling up 12% and washing machines gaining 3%. SDAs saw a mixed picture, with vacuum cleaners at +7% and shavers at -11%. With audio home systems at -19% and TVS at -3%, CE products delivered negative trends.

Source: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 09 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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Fact of the week

Germany

Great Britain

France

Italy

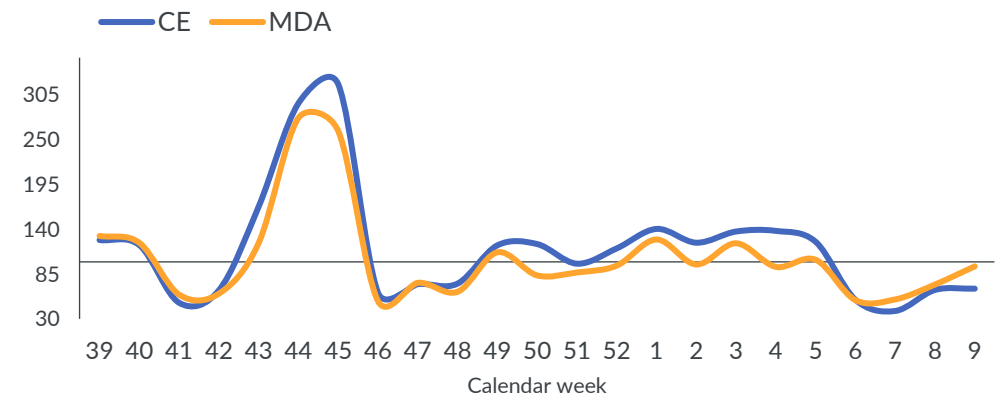
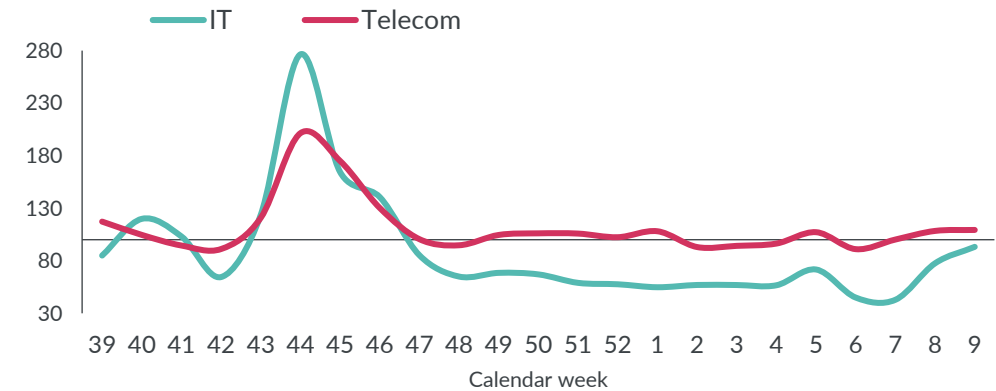
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Japan

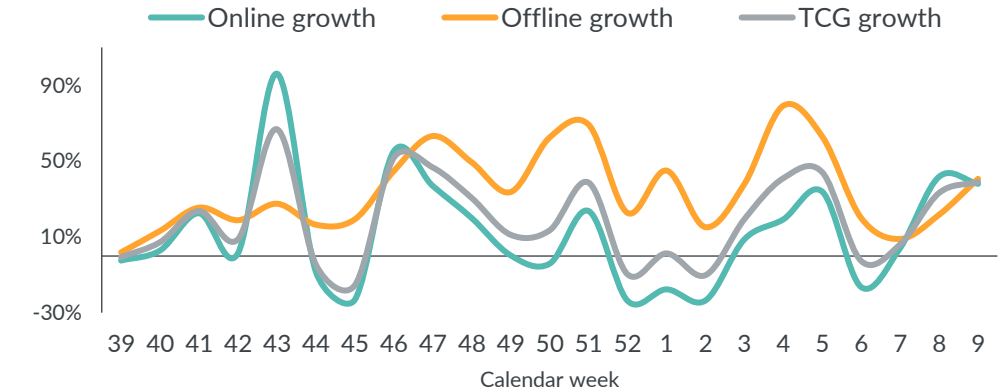
Brazil

➤ 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 09 (Feb 26 – Mar 03)



- Very good results – as in week 8 – for online sales (+38%) and traditional retail (+41%) drove an upswing of the total TCG market of 39%.
- Smartphones at +56% were the driving force of this development, due to their high share in the product group basket. Mobile computing delivered slight growth of 2%.
- Washing machines and cooling turned to remarkable growth of 25% and 32% respectively. PTV was able to catch up further but was still behind, at -8%.



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