

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 226
Week 41 of 2024
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Fact of the week

Germany

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- **gfknewron Market** – Monitor performance, create the right opportunities and outperform the competition
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gfknewron empowers you to transform insights into profitable actions, craft winning plans with confidence, and turn potential challenges into opportunities for growth.

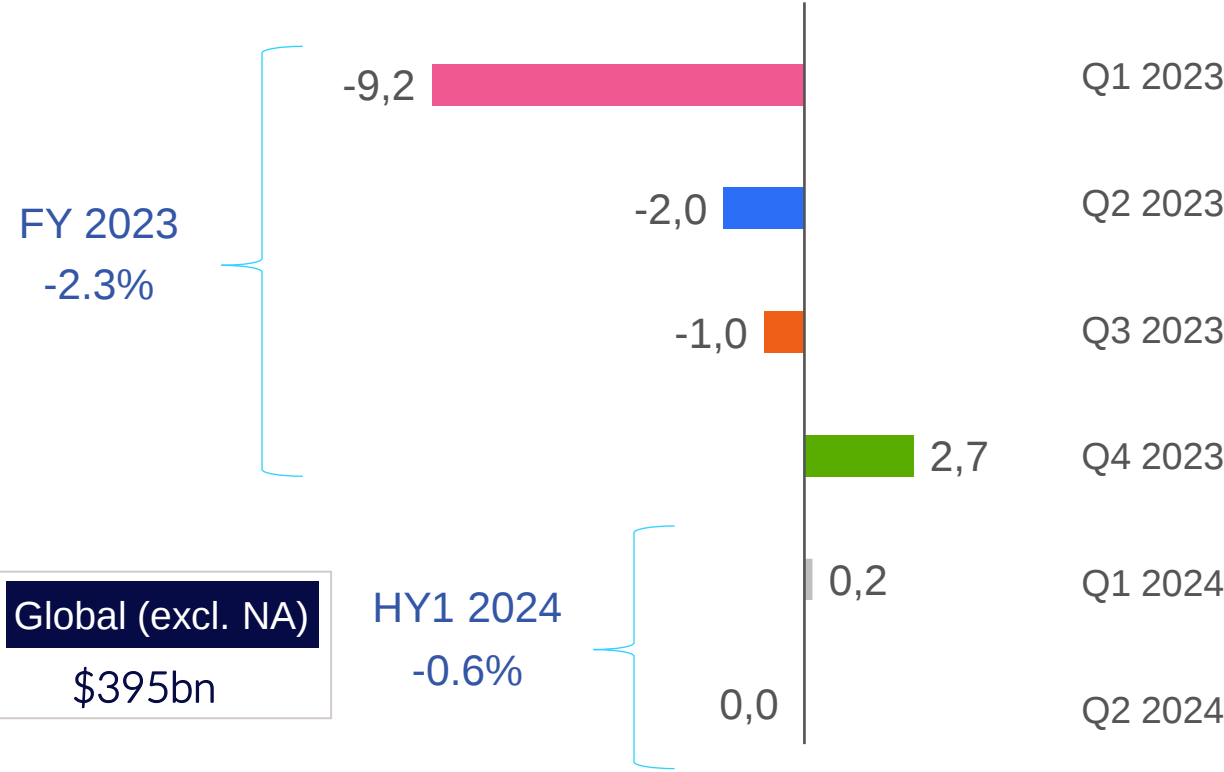
Fact of the Week

Tech and durables market navigate towards stabilized growth in 2024!

Negative price impacts and elevated market saturation prevent further revenue growth

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Global (ex NA) Tech and Durables | Sales Value USD (NSP) | Growth rate YoY (%) | Jan 2023 – Jun 2024



Inflation global (OECD)

Q1 2023	+8.6
Q2 2023	+6.5
Q3 2023	+6.2
Q4 2023	+5.4
Q1 2024	+5.8
Q2 2024	+5.6

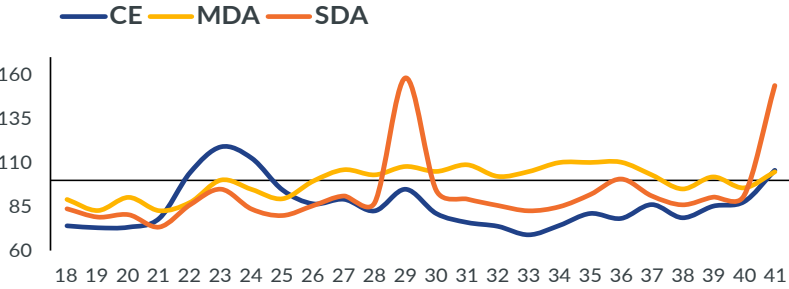
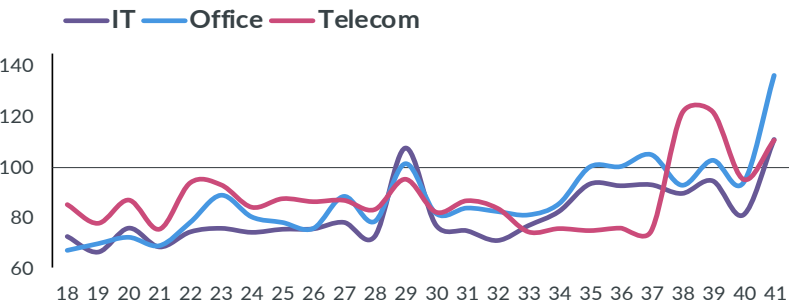
Weekly retail insights from the Point of Sale

Spotlight on Germany

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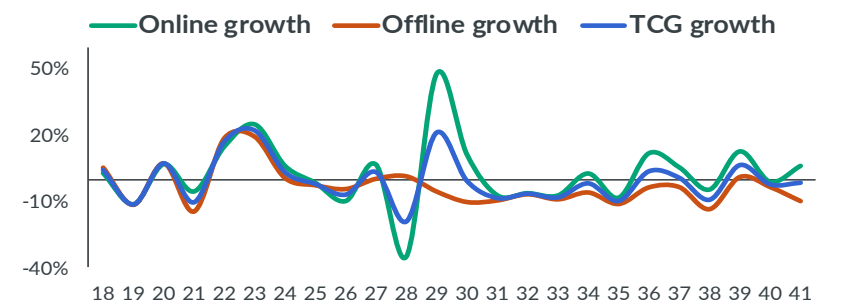
Please note: Below lines depict a sales index vs an average 2023 week. Above average absolute sales are shown as >100 (≠ growth rate vs same week 2023).

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 41 (Oct 07 – Oct 13)

- Traditional retail at -10% dragged the total TCG market down by 1%. Online sales at +6% were unable to compensate.
- While printers experienced remarkable upswings of +35% for laser and +26% for inkjet, IT products delivered weak results with desk computing flat and mobile computing at -6%. Smartphones decelerated at -7%.
- All CE categories witnessed gains with soundbars out in front at +22% and PTV posting +2%. MDAs/SDAs saw a mixed picture. While shavers posted +29%, air treatment dropped by 13%. Washing machines were flat.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 41 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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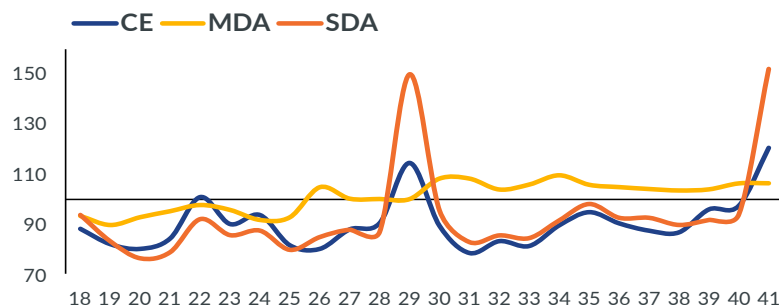
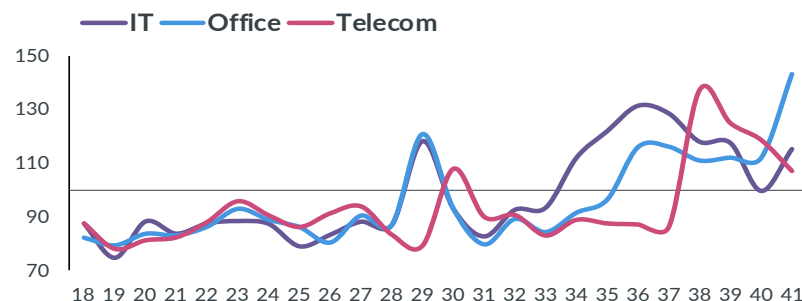
Spain

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 41 (Oct 07 – Oct 13)

- Online sales at +9% lifted the total TCG market by 2%. The overall result was clouded by traditional retail at -8%
- Except for media tablets at -5%, the other IT/office categories posted growth. Mice led at +30% and inkjet printers claimed second place at +24%. Mobile computing at +2% was the weakest product group. Smartphones experienced a decline of 7%.
- Most CE/MDA/SDA categories posted solid double-digit growth except for PTV at +4%, cooling at +3%, and flat washing machines.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 41 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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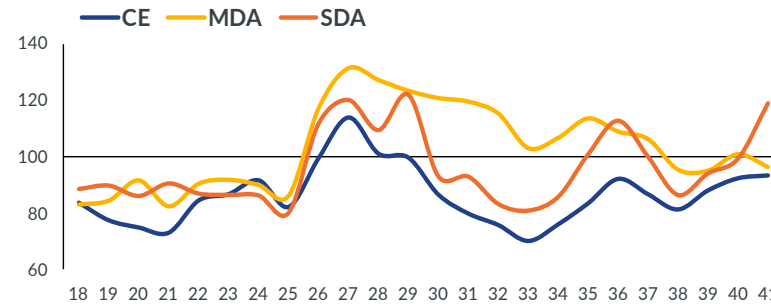
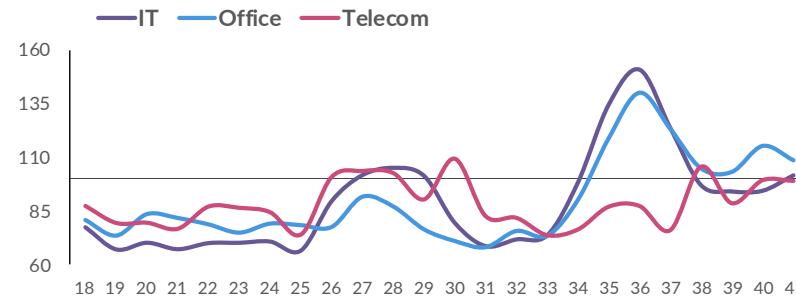
Spain

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



Key take aways in calendar week 41 (Oct 07 – Oct 13)

- Traditional retail delivered +5%. Combined with online sales at +13% this resulted in +8% for the total TCG market.
- Laser printers delivered a remarkable result in week 41, posting +41%. The other categories delivered growth as well with desk computing the weakest category at +4%. Smartphones were flat.
- Supported by Prime Day, SDAs mostly posted sound double-digit positive scores with dental care in the lead at +57%. MDAs lagged these results. Washing machines were positive at +4% - cooling was weak at -5%. PTVs were flat.



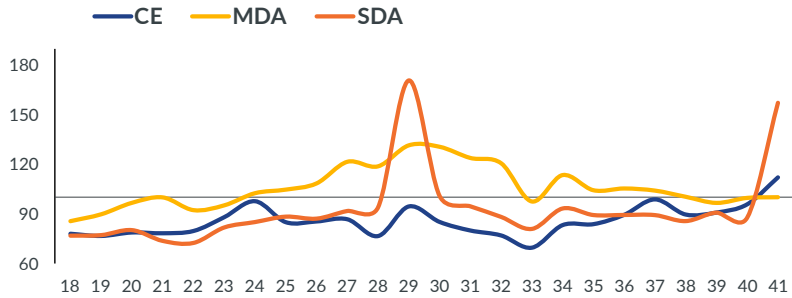
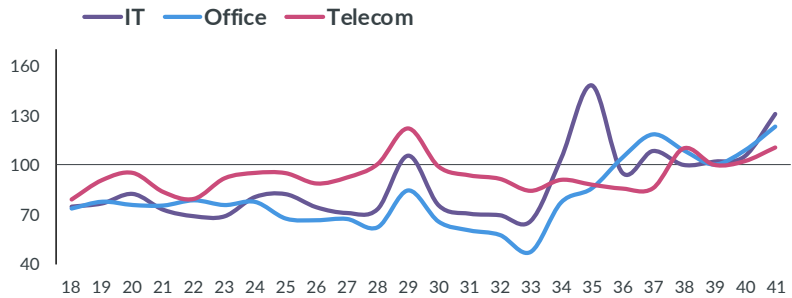
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 41 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

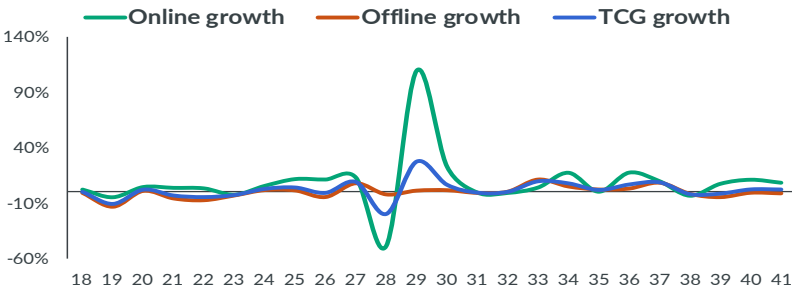
Spotlight on Italy

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



Key take aways in calendar week 41 (Oct 07 – Oct 13)

- Online sales at +9% lifted the total TCG market by 2%. Traditional retail at a slight -1% did not cloud the overall result.
- IT/office products delivered a mixed performance with laser printers at +6% and desk computing at -28%. Inkjet printers were flat. Smartphones dropped by 6%.
- Except for cooling at -8%, MDAs/SDAs were influenced by Prime Day and delivered mostly double-digit growth with food preparation out in front at +37%. PTV experienced a plus of 6% while audio home systems dropped by 12%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 41 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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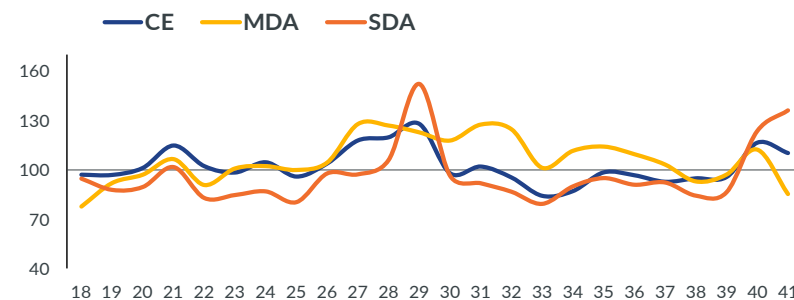
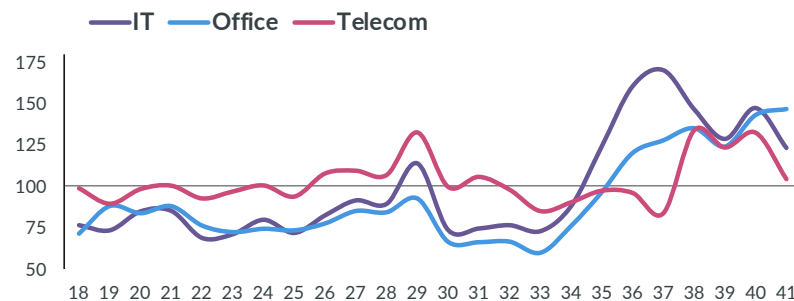
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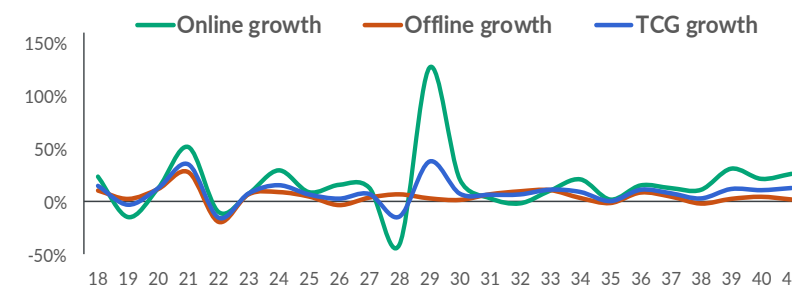
Brazil

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 41 (Oct 07 – Oct 13)

- Good growth of online sales (+27%) – boosted by Prime Day – lifted the total TCG market by 13%. Traditional retail added to it, at +3%.
- All IT/office categories were double-digit positive with desk computing in the lead at +47% and inkjet printers posting +34%. Smartphones increased by 3%.
- While audio home systems lagged at -7%, soundbars grew by 29%. PTV accelerated at +17%. Cooling was flat but all other MDA/SDA categories accelerated in double digits. Vacuum cleaners were successful at +30%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 41 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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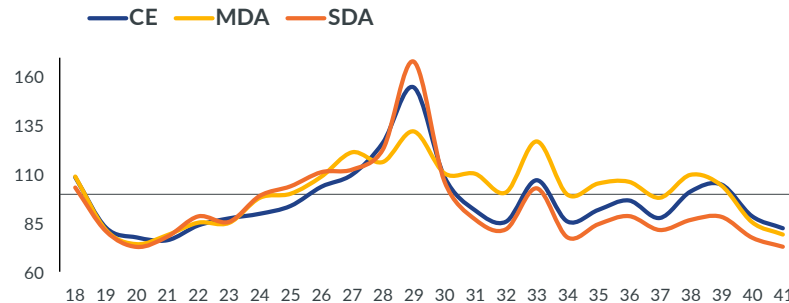
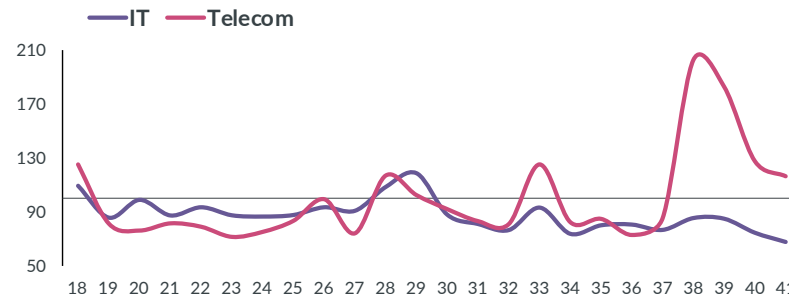
Spain

Japan

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 41 (Oct 07 – Oct 13)

- A substantial drop in online sales of 12% (compared to +30% in week 40) led to a deceleration of the total TCG market by 10%. Traditional retail at -10% added to it.
- There were double-digit negative trends for IT and telecom with smartphones at -3% hit least.
- Except for food preparation at +6%, CE/MDA/SDA categories posted negative results which were mostly double-digit. Air treatment (-30%), hot beverage makers (-29%) and soundbars (-29%) were the weakest categories in week 41.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 41 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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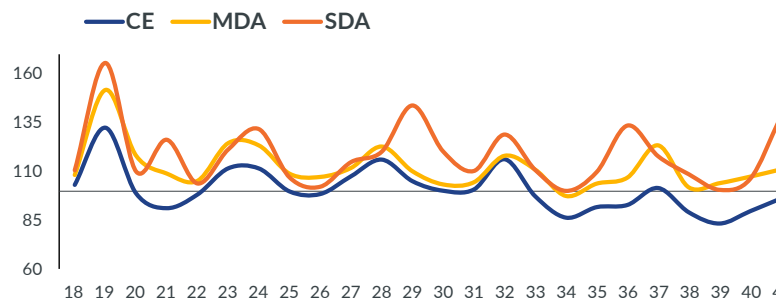
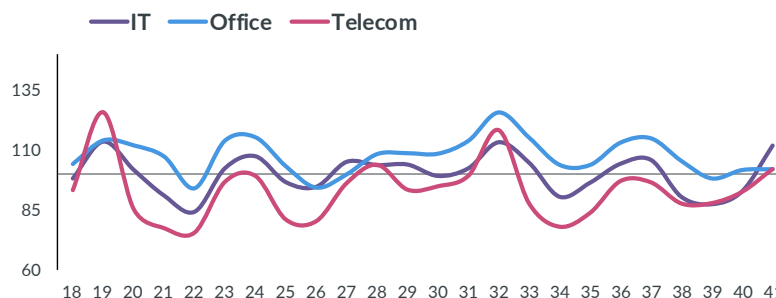
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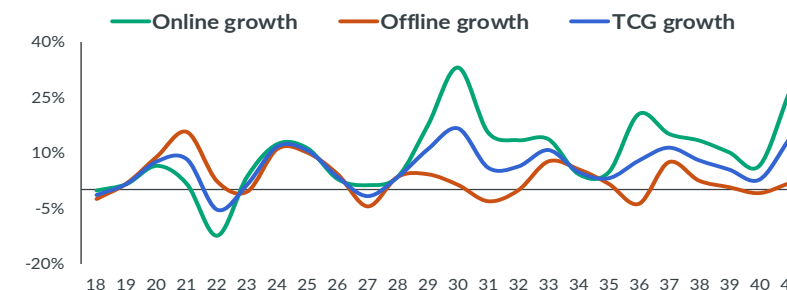
Brazil

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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 41 (Oct 07 – Oct 13)

- A strong acceleration of online sales of +26% - supported by Prime Day – led to +14% for the total TCG market. Traditional retail delivered a slight uptick of 2%.
- Laser printers and desk computing were outstanding at +45% and +41% respectively. Mobile computing was a bit behind at +8%. Smartphones were up 11%.
- Food preparation accelerated at a remarkable +64%. The only categories growing in single digits were hot beverage makers (+5%) and PTV (+4%).



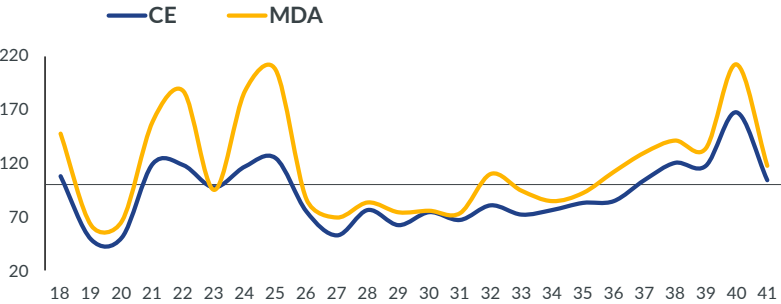
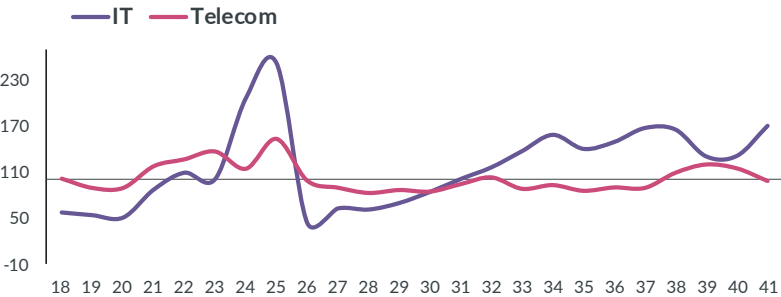
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 41 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

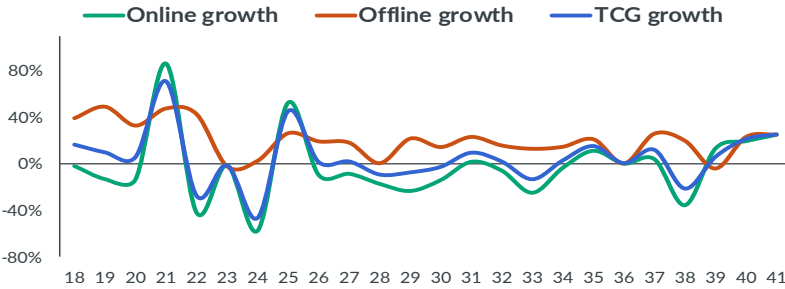
Spotlight on China

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



Key take aways in calendar week 41 (Oct 07 – Oct 13)

- At an identical rate of +25%, both traditional retail and online sales lifted the total TCG market by +25%. The upswing in recent weeks can be attributed to subsidies for laptops, TVs and MDA (particularly for energy-saving devices).
- Smartphones were the weakest category for growth rate, at +5%, but they delivered an impact due to their high share in the product group basket. Mobile computing delivered a plus of 65%.
- PTV delivered the highest rate, at +109%. Cooling accelerated at +104% and washing machines added +88%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 41 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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