

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 222

Week 37 of 2024

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NielsenIQ



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Fact of the week

Germany

Great Britain

France

Italy

Spain

Japan

Brazil

China



- **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

Feature trends continue, premium features in high demand, but growth is still weak.

It is important to indulge or pamper myself on a regular basis.

39% ↑
global respondents agreeing

About gfknewron

Fact of the week

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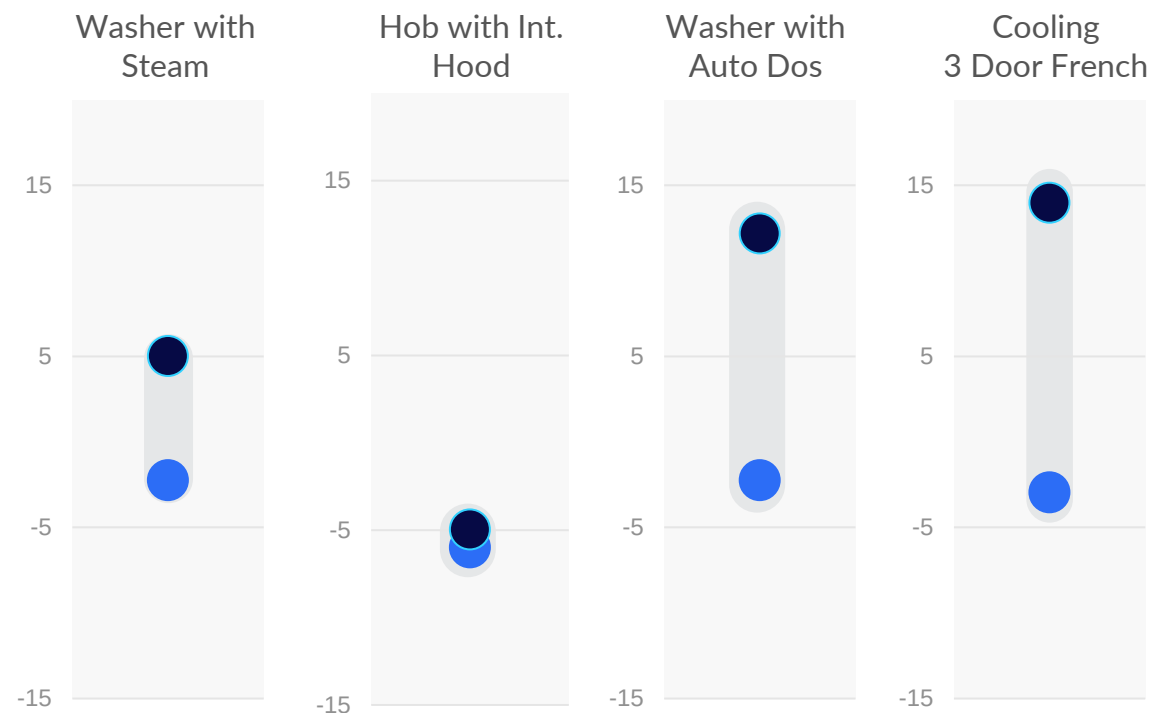
Japan

Brazil

China

Market drivers by product segment
growth rate USD vs PY in %

● Segment ● Product Group



Weekly retail insights from the Point of Sale

Spotlight on Germany

About **gfknewron**

Fact of the week

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France

Italy

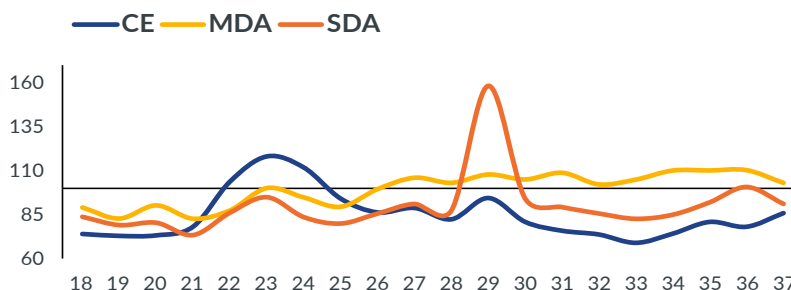
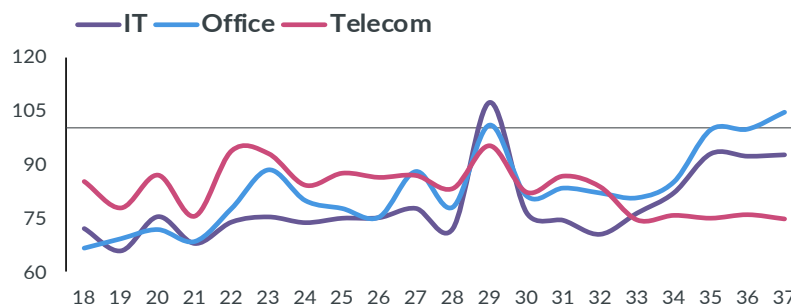
Spain

Japan

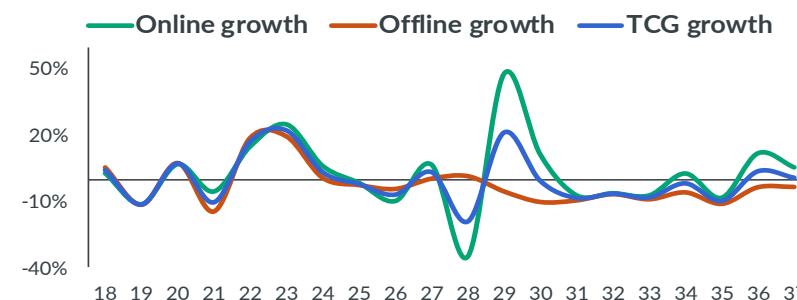
Brazil

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 37 (Sep 09 – Sep 15)

- Online sales at +6% raised the total TCG market to a slight plus of 1%. Traditional retail at -3% did not negate the result.
- Only desk computing posted a negative trend in IT/office products, at -15%. All others delivered growth with inkjet printers in the lead at +13%. Smartphones experienced a downswing of 4%.
- CE products delivered growth with PTV at +16%. SDA categories witnessed gains with food preparation in front at +16%. The only exception was air treatment at -31%. Cooling lagged at -5% and washing machines were flat.

SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 37 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

About **gfknewron**

Fact of the week

Germany

Great Britain

France

Italy

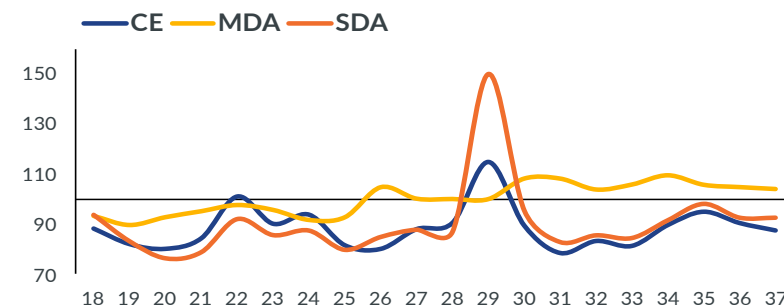
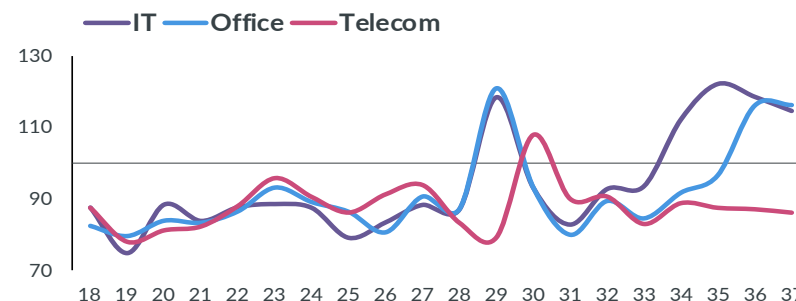
Spain

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 37 (Sep 09 – Sep 15)

- Flat traditional retail and online sales at +12% lifted the total TCG market by 7%.
- IT/office products were led by monitors at +23%. Mice claimed second place at +15%. Media tablets were at the other end of the scale at -9%. Smartphones posted +13%.
- CE products delivered growth too with audio home systems leading at +10% and TVs at +4%. MDAs/SDAs saw growth except for cooling at -14%. While hot beverage makers led at +20%, all other categories posted moderate increases.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 37 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop 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

Germany

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Italy

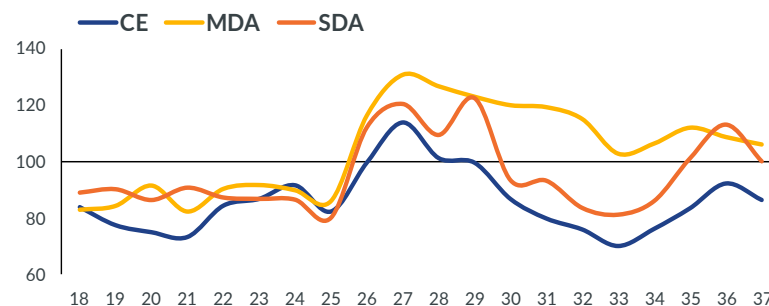
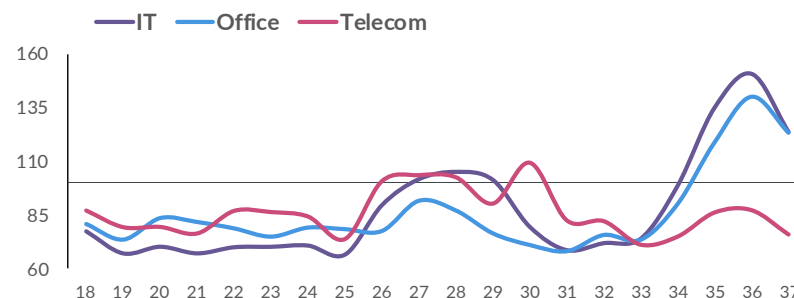
Spain

Japan

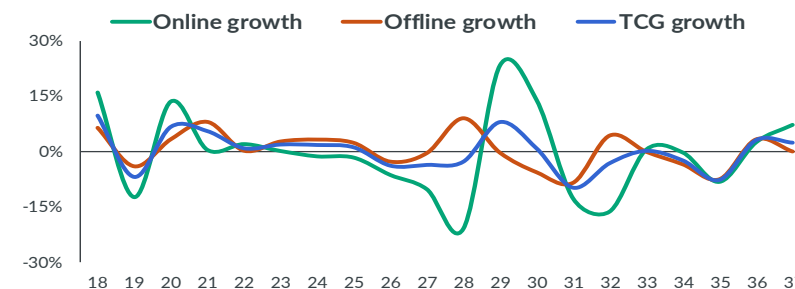
Brazil

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 37 (Sep 09 – Sep 15)

- Flat traditional retail and online sales at +7% lifted the total TCG market by 2%.
- The overall picture for IT/office products was positive except for desk computing at -7%. Laser printers were successful at +20%. Smartphones experienced a small decline of 3%.
- Except for headsets at +14%, CEs suffered with audio home systems posting the highest decrease at -22%. TVs lost 7%. Dental care (-12%) and cooling (-10%) were the only negative categories in DA. Air treatment accelerated at +27%. Vacuum cleaners claimed second place at +18%.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 37 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop 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

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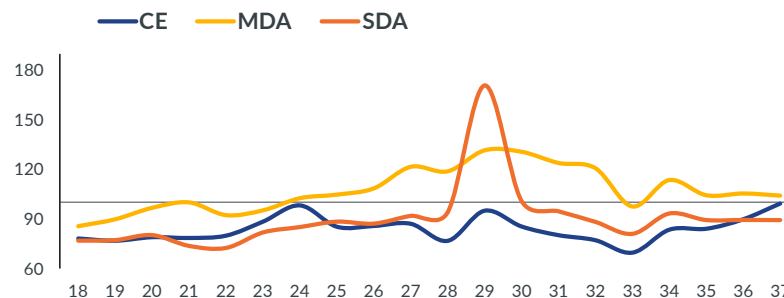
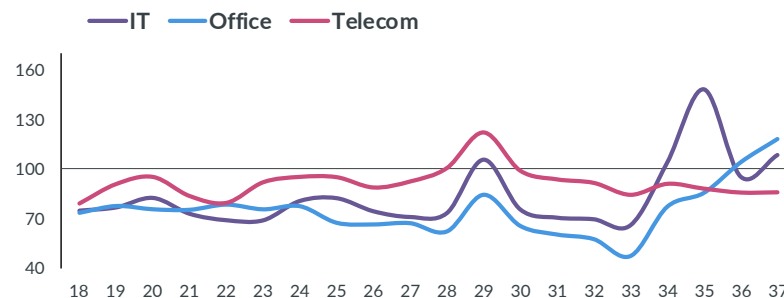
Spain

Japan

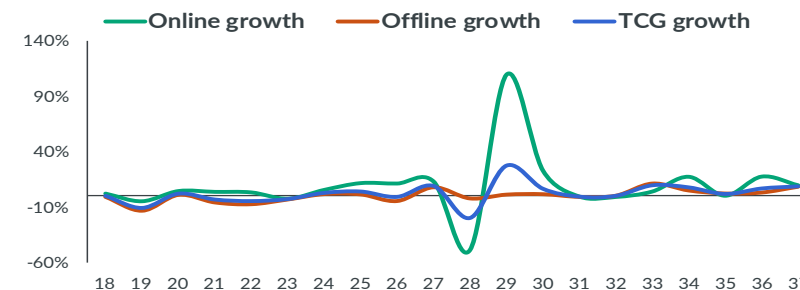
Brazil

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 37 (Sep 09 – Sep 15)

- Online sales at +10% lifted the total TCG market to a plus of 8%. Traditional retail at +8% added to it.
- IT/office products were led by laser printers at +21%. Mobile computing claimed second place at +10%. Inkjet printers were weak at -2%. Smartphones posted a slight plus of 3%.
- Within the overall positive scenario for MDA/SDA, air treatment posted the highest uplift at +23%. Hot beverage makers claimed second place at +18%. Food preparation was the only declining category, at -5%. While PTV accelerated at +20%, audio home systems dropped by 17%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 37 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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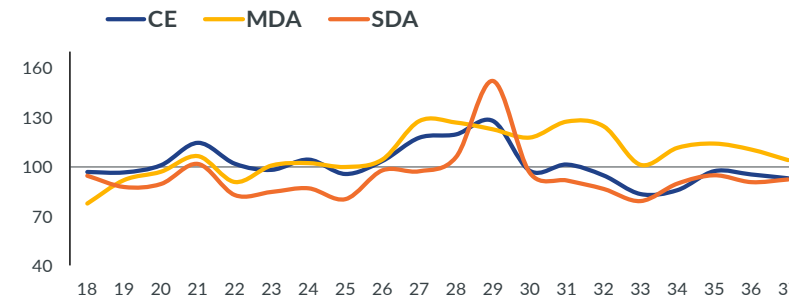
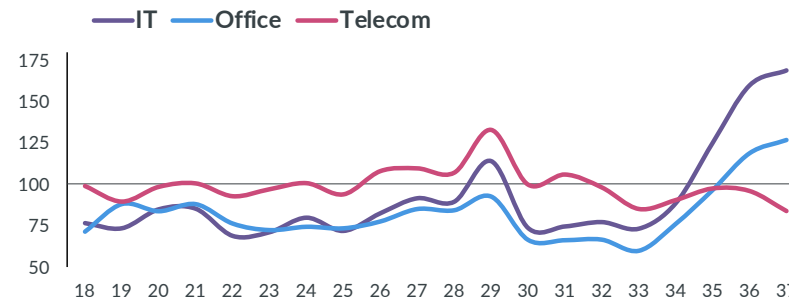
Spain

Japan

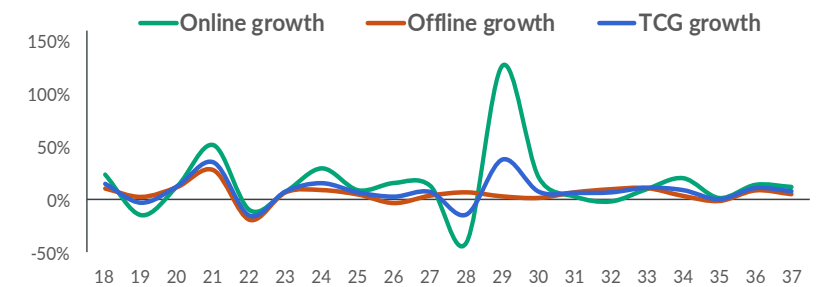
Brazil

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 37 (Sep 09 – Sep 15)

- Good results of +13% for online sales and +6% for traditional retail lifted the total TCG market by 8%.
- The positive picture for IT/office categories saw desk computing in the lead at +29% and media tablets second at +17%. Smartphones experienced moderate growth of 8%.
- While PTVs accelerated at 12%, soundbars declined by 1% and audio home systems were flat. Hot beverage makers at +27% was the leading category in MDA/SDA. Cooling presented the smallest increase at +1%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 37 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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Fact of the week

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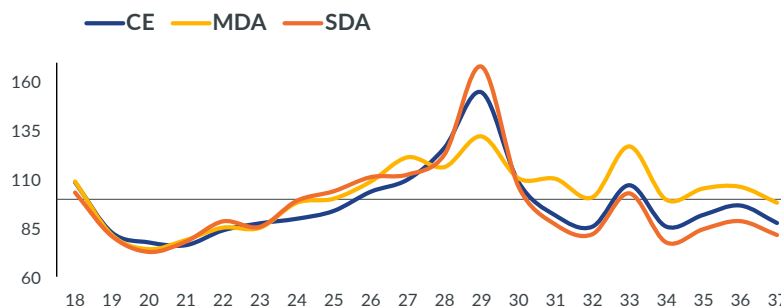
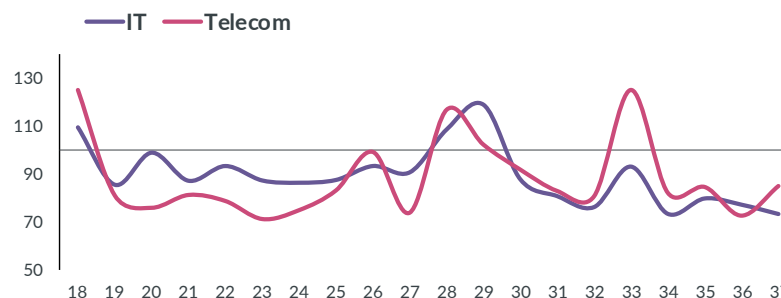
Spain

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 37 (Sep 09 – Sep 15)

- Traditional retail delivered a minus of 7%, leading to -3% for the total TCG market. Online sales at +19% was not able to impact the total result visibly.
- Week 37 saw +6% for media tablets and -14% for mobile computing. Smartphones accelerated at +25%.
- CE categories posted downswings of -17% for PTV and -14% for soundbars. Headsets experienced an uptick of 1%. While food preparation delivered +20%, shavers at +4% and dental care at +3% were weak. All other MDAs/SDAs posted negative results with hot beverage makers leading at -16%.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 37 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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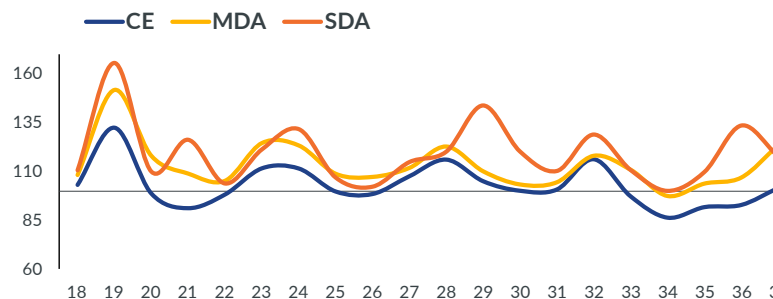
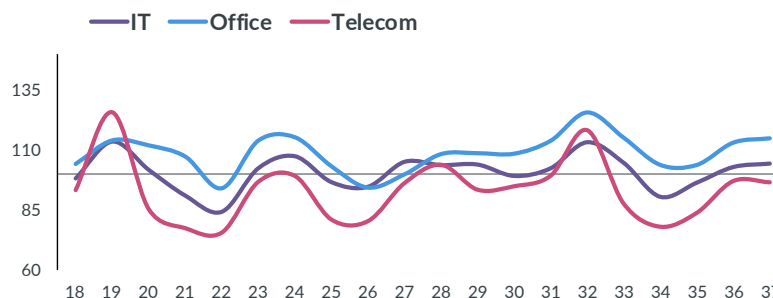
Spain

Japan

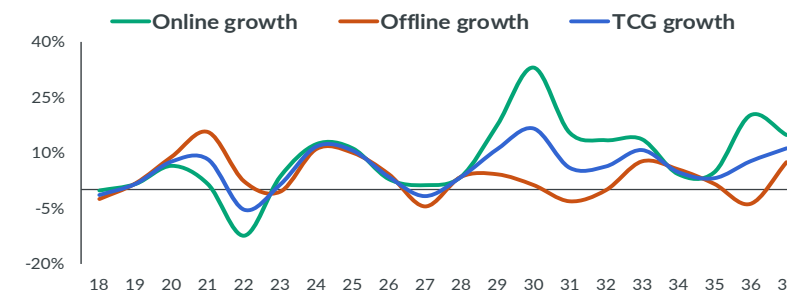
Brazil

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 37 (Sep 09 – Sep 15)

- Acceleration of online sales at +15% and a plus of 7% for traditional retail led to +11% for the total TCG market.
- Most IT/office products posted double-digit growth rates with laser printers in the lead at +28%. Mobile computing delivered +1%. Smartphones were up 7%.
- Except for PTV at +3% and hot beverage makers at +1%, there was double-digit growth for all other MDA/SDA/CE categories. Cooling led at +31% and vacuum cleaners and audio home systems claimed second place at +29%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 37 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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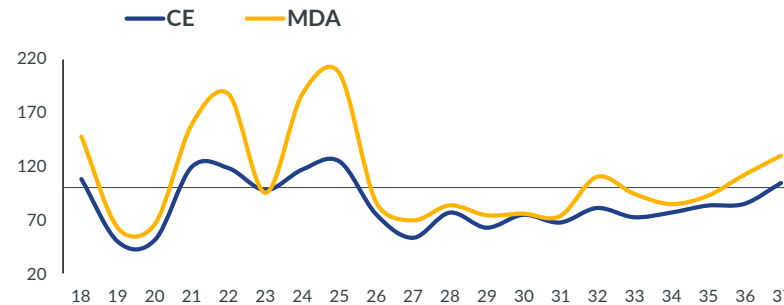
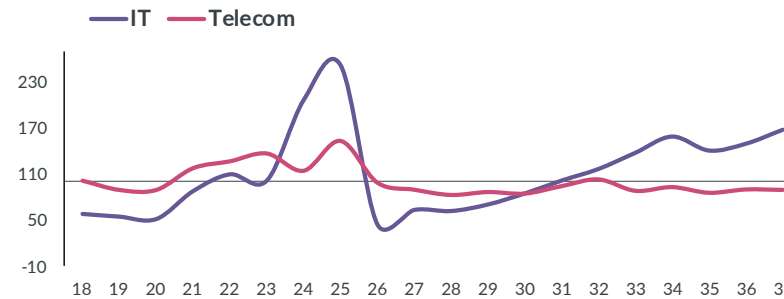
Spain

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 37 (Sep 09 – Sep 15)

- A strong increase for traditional retail (+26%) led to +12% for the total TCG market. Online sales at +4% added to it.
- Impressive uplifts for cooling (+84%), washing machines (+56%) and PTV (+46%) were the drivers of this development.
- While mobile computing delivered good growth too, up by 28%, smartphones were weak at -4%. This clouded the result due to their high share in the product group basket.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 37 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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