

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 223
Week 38 of 2024
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Fact of the week

Germany

Great Britain

France

Italy

Spain

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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

Insights from Prime Day Week 2024

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**Subdued
performance**

While Prime Day week successfully generated demand, its revenue performance fell short compared to last year

**Focus on
affordability**

Even with increased price cuts compared to last year's first prime day week, affordable brands grew the most

**Push for online
retail**

While online sales normalize at high levels, Prime Day week triggers pure player sales growth way beyond last year

Weekly retail insights from the Point of Sale

Spotlight on Germany

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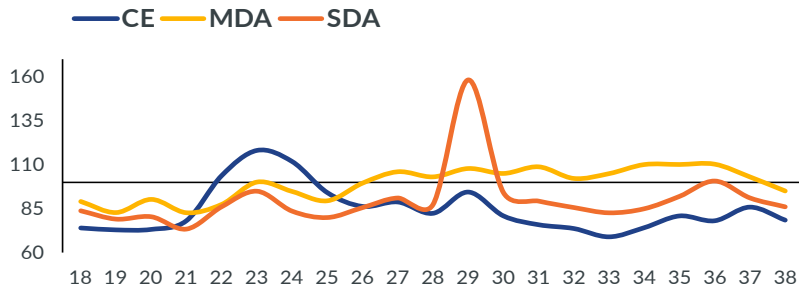
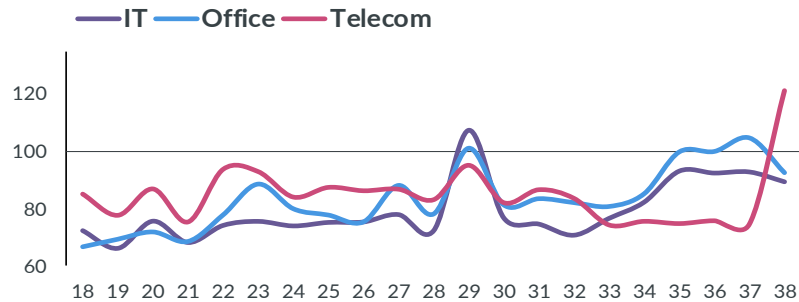
Spain

Japan

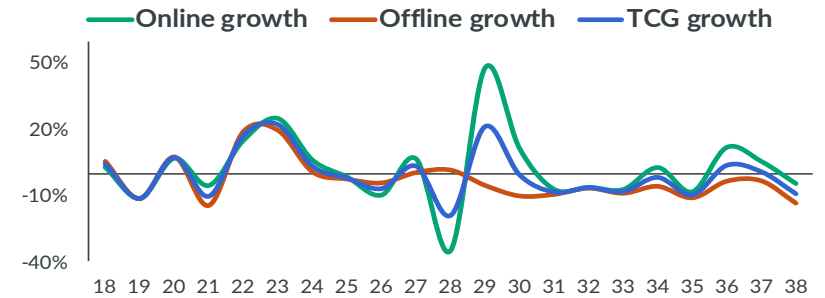
Brazil

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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 38 (Sep 16 – Sep 22)

- -13% for traditional retail dragged the total TCG market down by 9%. Online sales at -4% added to it.
- While inkjet printers experienced a tiny uptick of 1%, desk computing and laser printers lost 12% and 15% respectively. Smartphones slumped at -14%.
- Except for PTV at +3%, CE categories witnessed losses with audio home systems posting -18% and soundbars down by 8%. While air treatment stood out at -28% and cooling decreased by 11%, all other MDA/SDA categories posted moderate ups and downs.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 38 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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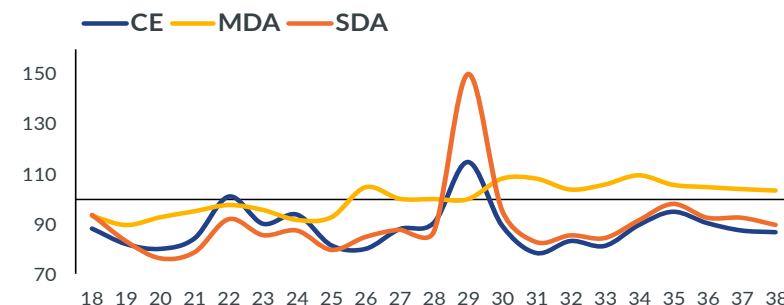
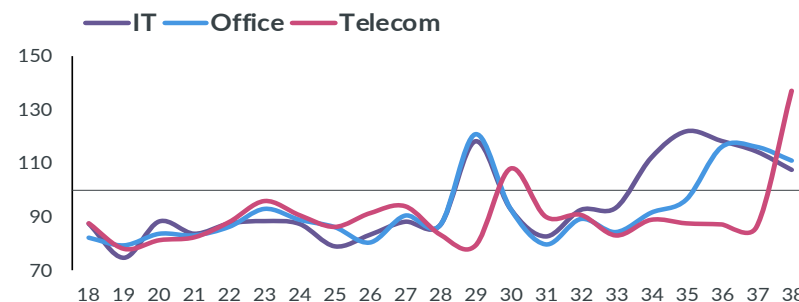
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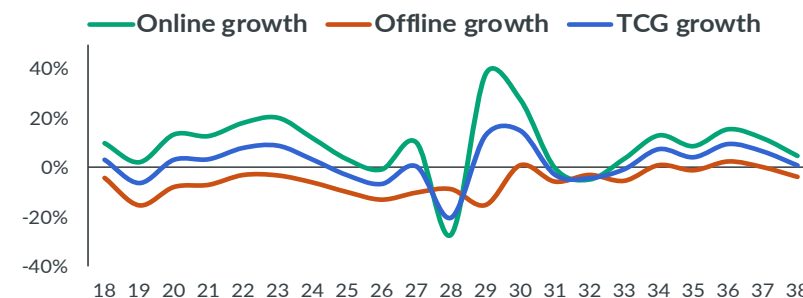
Brazil

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 38 (Sep 16 – Sep 22)

- Traditional retail fell by -4% but online sales at +5% halted the fall of total TCG, enabling it to post a slight uptick of 1%.
- The mixed picture for IT/office products saw monitors in the lead at +21%. Media tablets marked the other end of the scale, at -9%. Smartphones experienced an uptick of 2%.
- CE products posted a mixed picture with headsets posting +12% and PTV at -7%. MDAs/SDAs delivered an overall positive performance with shavers and food preparation in the lead at +22% and +18%. Vacuum cleaners lagged at -3%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 38 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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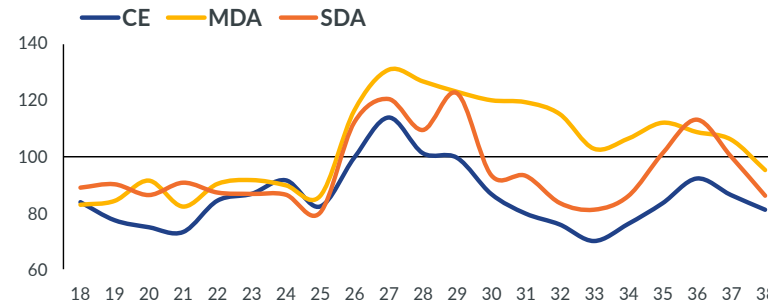
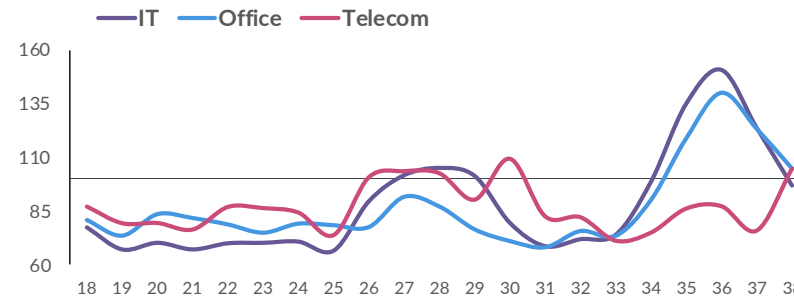
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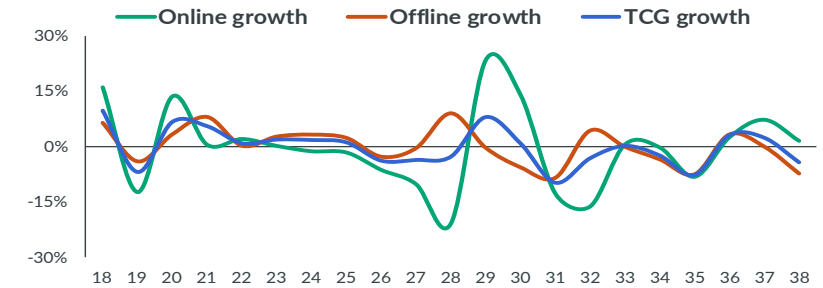
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 38 (Sep 16 – Sep 22)

- Traditional retail delivered -7%. Added to weak online sales at +1% this meant a downswing of 4% for the total TCG market.
- Except for laser printers at +28% and media tablets at +8%, all other IT/office products posted negative trends with desk computing the worst-performing category at -10%. Smartphones also slumped at -10%.
- Except for headsets at +21%, CEs were double-digit negative. Air treatment lost 25% and dental care was down 19%. Cooling (-12%) and hot beverage makers (-9%) were hit less.



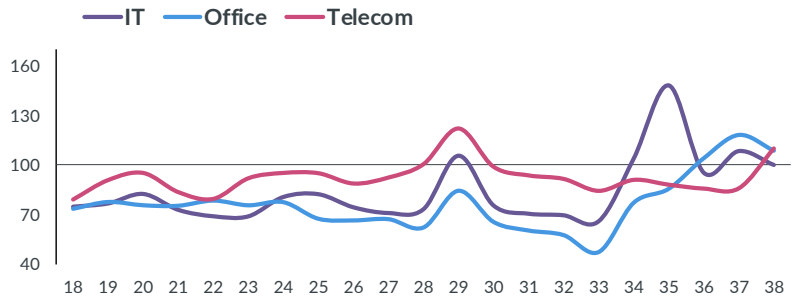
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 38 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

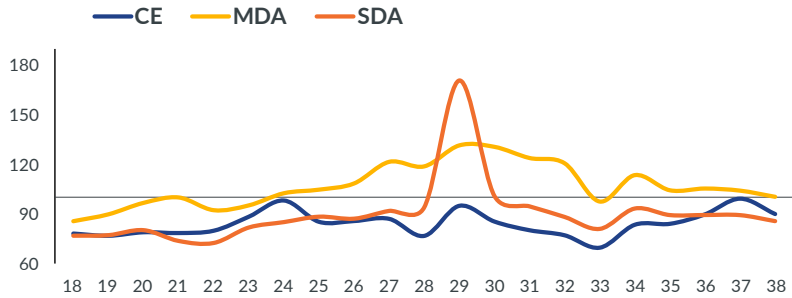
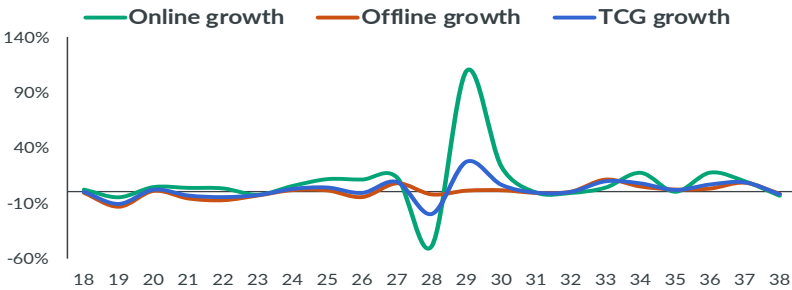
Spotlight on Italy

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



Key take aways in calendar week 38 (Sep 16 – Sep 22)

- Close trends of -3% for online sales and -2% for traditional retail led to a deceleration of 2% for the total TCG market.
- IT/office products delivered moderate ups and downs with media tablets leading at +14% and desk computing at the other end of the scale at -8%. Smartphones declined by 8%.
- Hot beverage makers were the ray of light in week 38, at +23%. Audio home systems were at the other end of the scale, at -11%. While cooling was flat, all other CE/MDA/SDA categories delivered single-digit gains and losses.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 38 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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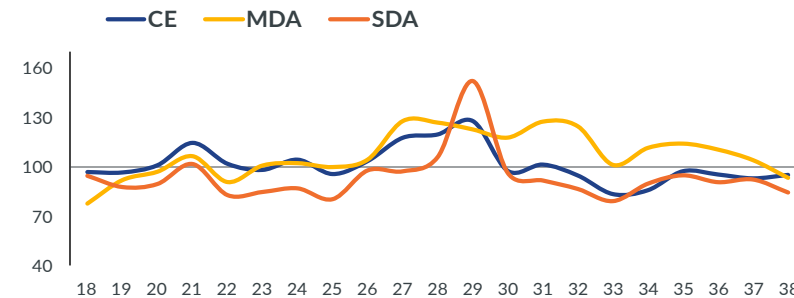
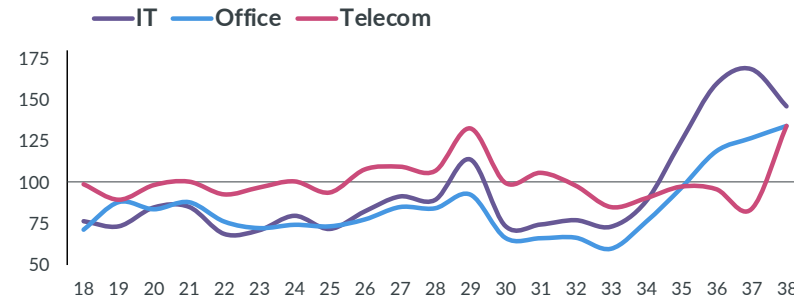
Spain

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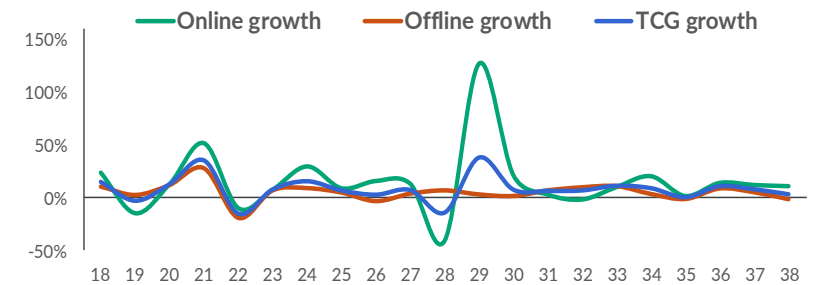
Brazil

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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 38 (Sep 16 – Sep 22)

- Online sales delivered a good growth of 12%. Flat traditional retail clouded the result for total TCG, ending at +3%.
- Except for desk computing at +8%, all other IT/office categories were double-digit positive with media tablets in the lead at +20%. Smartphones lagged at -9%.
- While audio home systems declined by -9%, PTV grew by 11% and headsets by 26%. Except for cooling at -4%, the scores for the other MDAs/SDAs ranged between +1% for washing machines and +18% for hot beverage makers.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 38 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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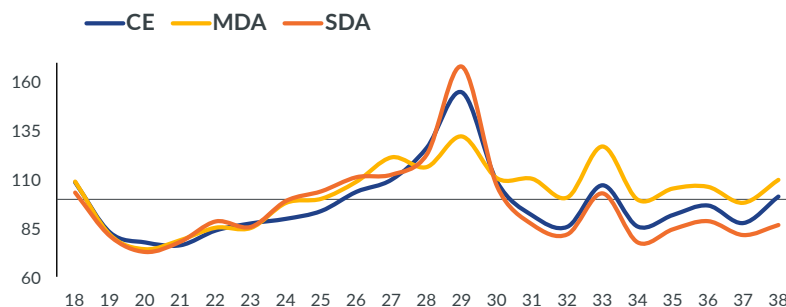
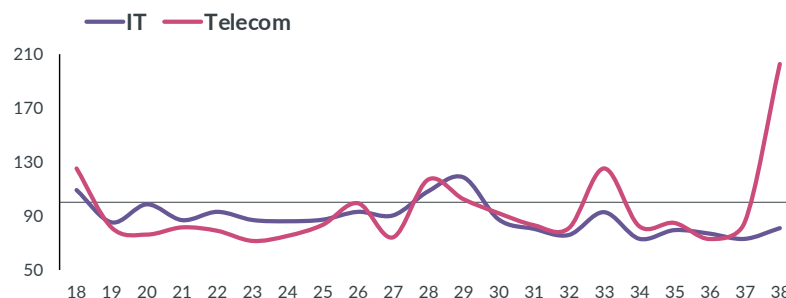
Spain

Japan

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



Key take aways in calendar week 38 (Sep 16 – Sep 22)

- Close rates of -10% for traditional retail and -8% for online sales dragged the total TCG market down by 10%.
- Week 38 delivered +22% for media tablets but -19% for mobile computing. Smartphones decelerated too, at -14%.
- While headsets posted growth of 10%, PTV declined by 15%. Except for food preparation at +16% and shavers at +1%, all other MDA/SDA categories delivered negative trends. Air treatment led at -15% and vacuum cleaners claimed second place at -12%.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 38 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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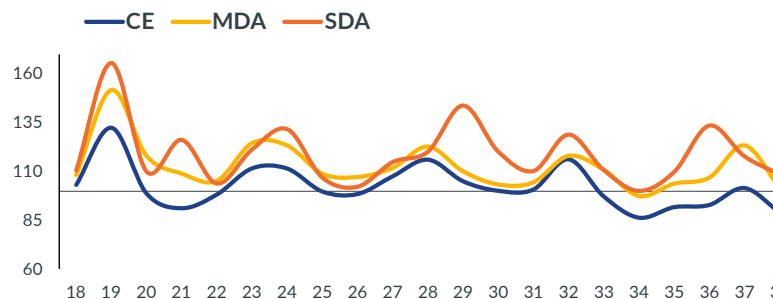
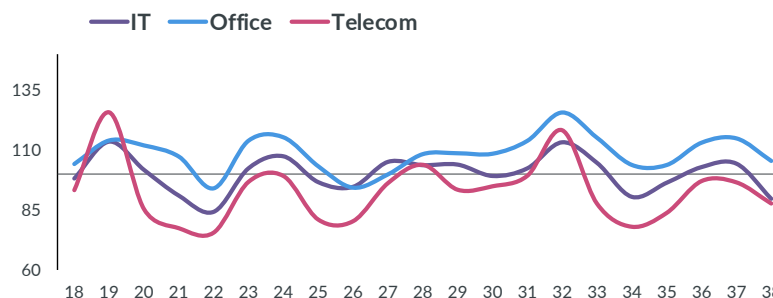
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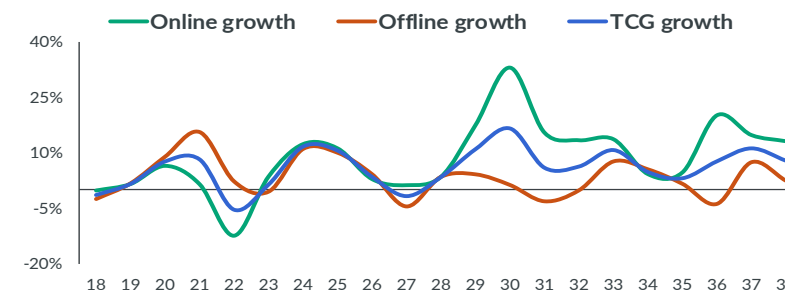
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Index: 2023 average weekly turnover in EUR = 100



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



Key take aways in calendar week 38 (Sep 16 – Sep 22)

- Acceleration of online sales of +13% and a plus of 2% for traditional retail delivered +8% for the total TCG market.
- IT/office posted growth overall with inkjet printers in the lead at +22%. Desk computing at +17% claimed second place. Mobile computing was flat. Smartphones were up 4%.
- Hot beverage makers presented a remarkable result of +49%. Vacuum cleaners, audio home systems, and washing machines were also double-digit positive, at +28%, +24%, and +20% respectively. Food preparation at +2% was the weakest SDA category in week 38.



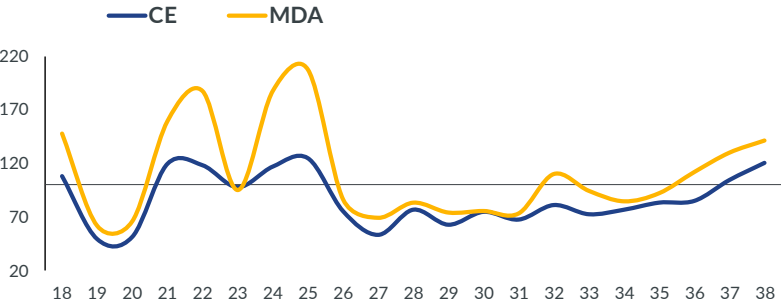
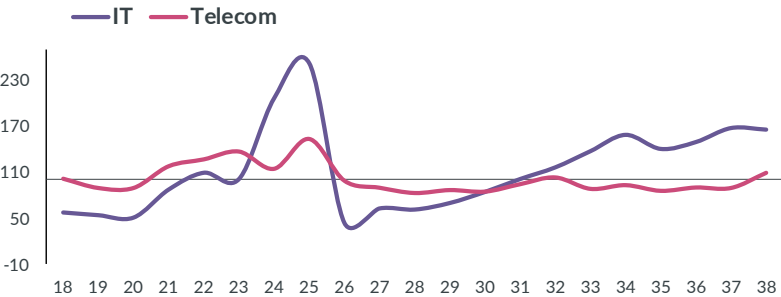
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 38 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

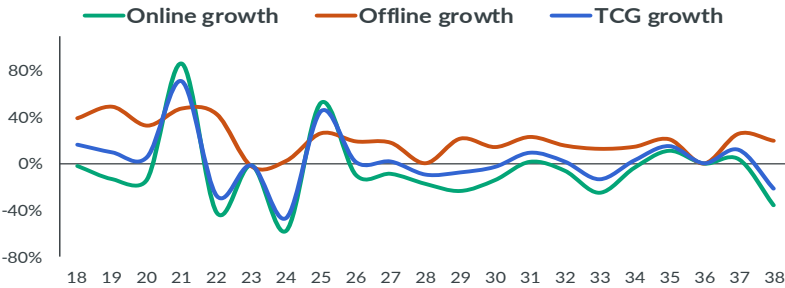
Spotlight on China

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



Key take aways in calendar week 38 (Sep 16 – Sep 22)

- Strong decline of online sales (-35%) led to -21% for the total TCG market. Traditional retail at +20% was unable to compensate.
- Smartphones at -40% were the driving force of this development, which was also due to their high share in the product group basket. Mobile computing delivered +56%.
- Cooling saw the highest rate, at +82%. Washing machines accelerated at +68% and PTV added a plus of 41%.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 38 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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