

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 224
Week 39 of 2024
Powered by **gfk**newron

NielsenIQ



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About gfknewron

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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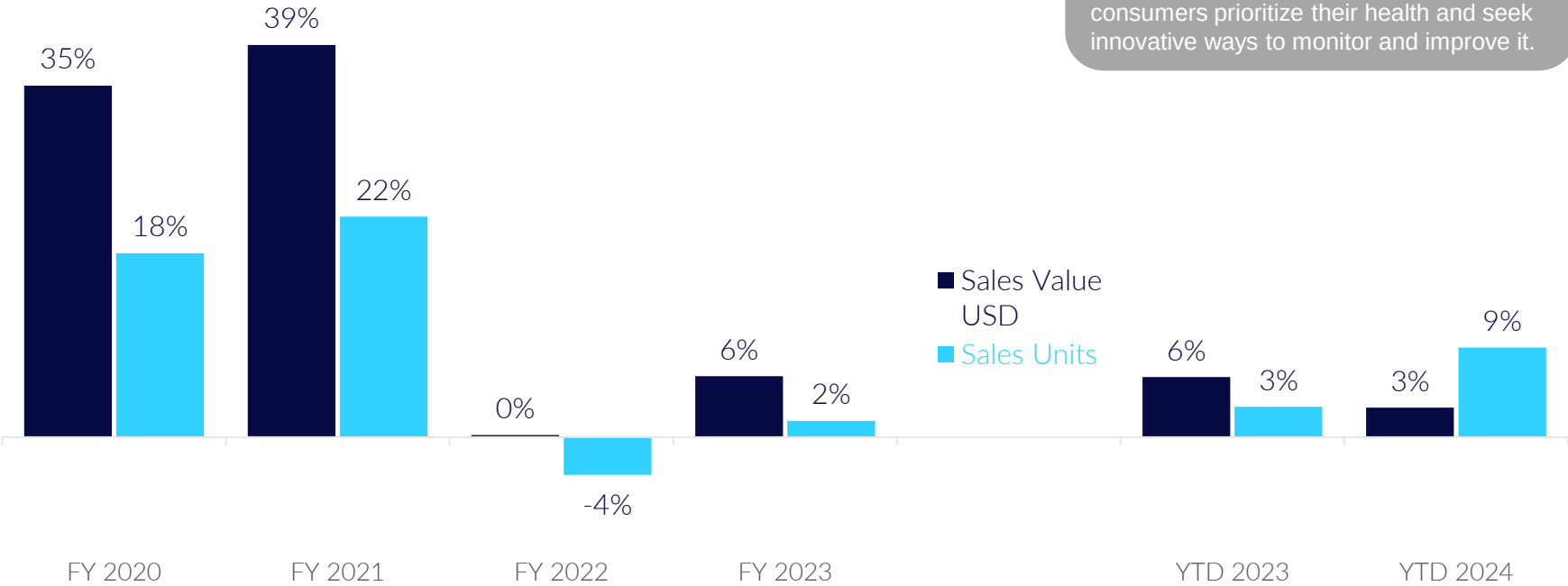
gfknewron empowers you to transform insights into profitable actions, craft winning plans with confidence, and turn potential challenges into opportunities for growth.

Fact of the Week

Core Wearables: Sustaining growth year after year & Volume gains higher for first time!

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Global ex. NA | Sales Value USD/Sales Units | Growth rate PY +/- % | 2020-2024; YTD: January - June



In the last couple of years, there has been a significant increase in the sales of wearables, driven by a heightened focus on health and wellness. This trend is expected to continue as consumers prioritize their health and seek innovative ways to monitor and improve it.

Weekly retail insights from the Point of Sale

Spotlight on Germany

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Germany

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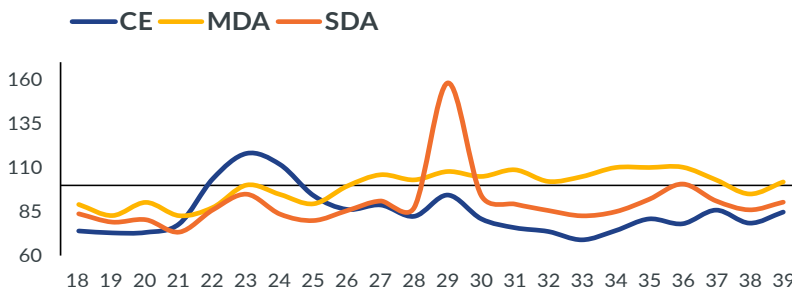
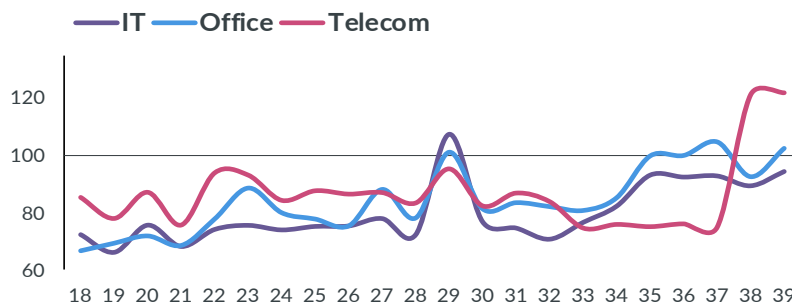
Spain

Japan

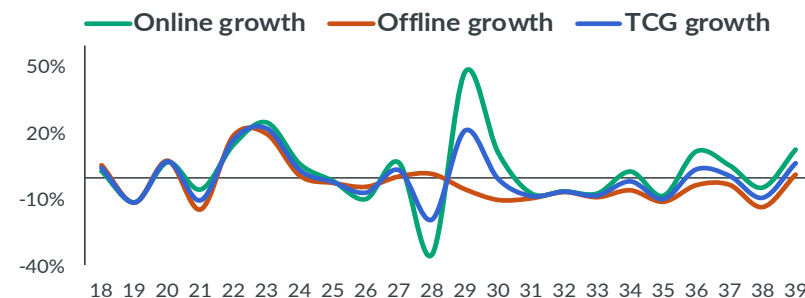
Brazil

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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 39 (Sep 23 – Sep 29)

- +13% for online sales lifted the total TCG market by 6%. Traditional retail at +1% added to it.
- While inkjet printers experienced a boost of +16%, all other IT/office categories posted moderate, single-digit drops. Smartphones accelerated at +11%, pushed by the Apple launch.
- Except for audio home systems at -4%, CE categories witnessed gains with PTV posting +4% and soundbars up by 3%. While air treatment stood out at -28% and cooling decreased by 10%, all other MDA/SDA categories posted moderate growth with food preparation in the lead at +21%.



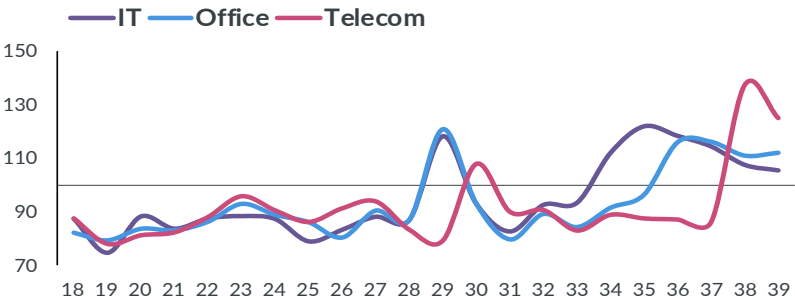
SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 39 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), monitors – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems, soundbars – 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

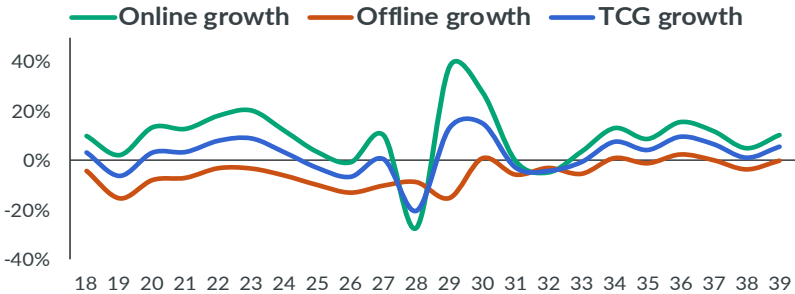
Spotlight on Great Britain

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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 39 (Sep 23 – Sep 29)

- Online sales at +10% lifted the total TCG market by 6%. The overall result was clouded by flat traditional retail.
- The mixed picture for IT/office products saw mice in the lead at +28% and monitors at +13%. Media tablets marked the other end of the scale, at -9%. Smartphones experienced an upswing of 11%, pushed by the Apple launch.
- While soundbars, vacuum cleaners and dental care were flat, all other CE/MDA/SDA products posted growth throughout, with food preparation and hot beverage makers in the lead at +13% and shavers claiming second place at +11%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 39 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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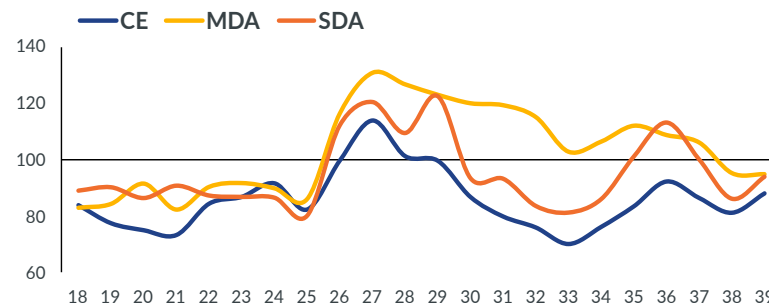
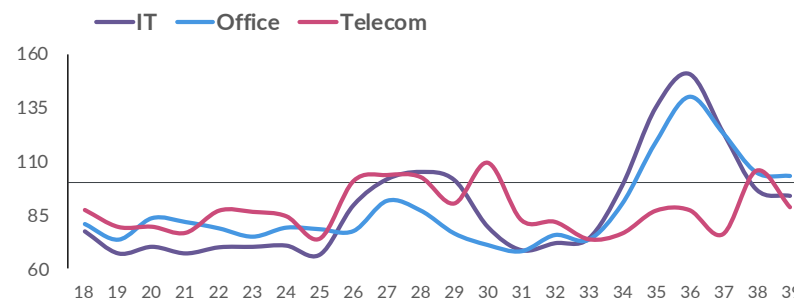
Spain

Japan

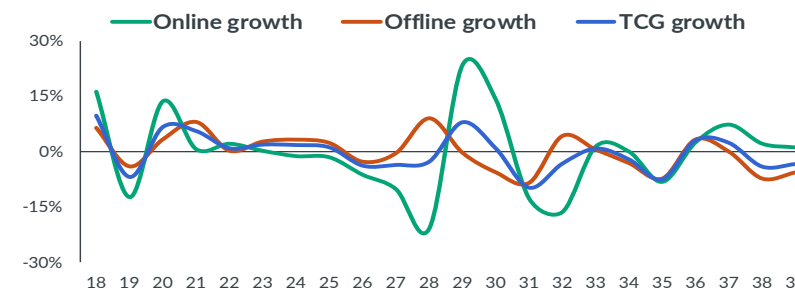
Brazil

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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 39 (Sep 23 – Sep 29)

- Traditional retail delivered -6%. Combined with weak online sales at +1% this resulted in a downswing of 3% for the total TCG market.
- While inkjet printers were flat, the other IT/office categories posted a mixed picture with laser printers in the lead at +15%. Desk computing was at the other end of the scale, at -9%. Smartphones slumped at -12%.
- Except for headsets at +23%, CEs posted negative trends. PTVs were down 7%. Air treatment gained 45% and cooling was down 11%. Hot beverage makers were flat.



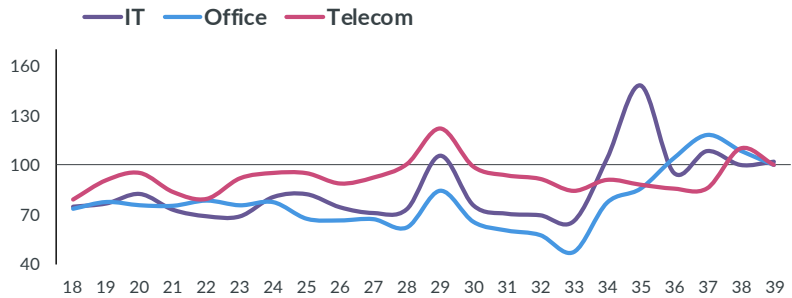
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 39 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

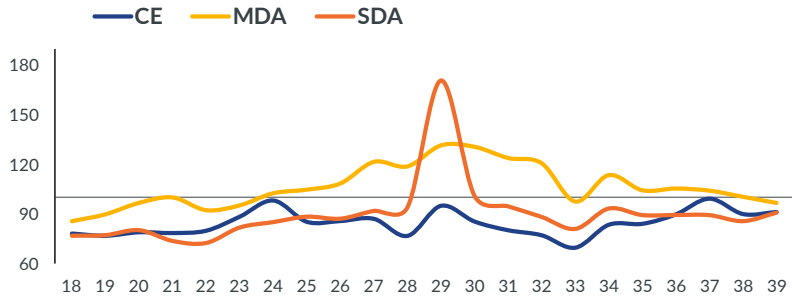
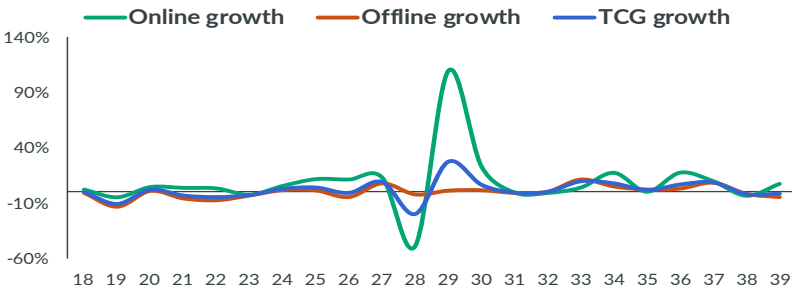
Spotlight on Italy

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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 39 (Sep 23 – Sep 29)

- Traditional retail at -5% dragged the total TCG market down by 2%. Online sales at +8% were unable to balance that out.
- IT/office products delivered losses of -21% for mobile computing and -11% for media tablets. Printers and smartphones were close to flat.
- Except for food preparation at +5%, SDAs showed double-digit growth with air treatment in the lead at +30% and vacuum cleaners claiming second place at +20%. Cooling slumped at -11%, while washing experienced an uptick of 4%. PTV gained 2%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 39 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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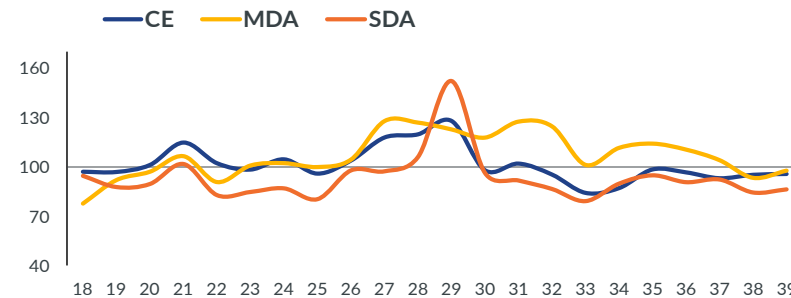
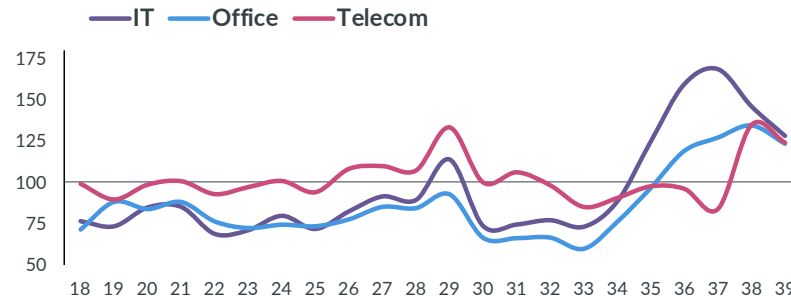
Spain

Japan

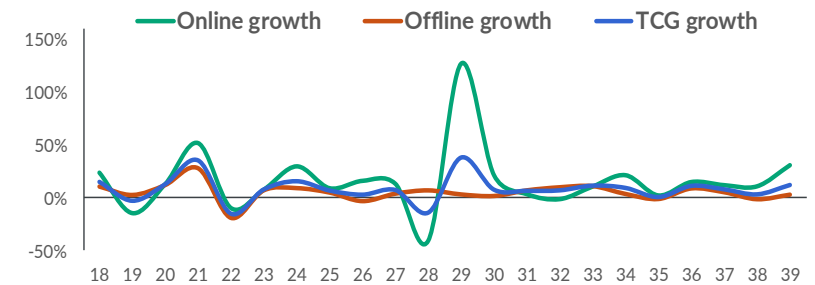
Brazil

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 39 (Sep 23 – Sep 29)

- Substantial growth of online sales (+31%) lifted the total TCG market by 12%. Traditional retail added to it at +4%.
- Except for laser printers at -4%, all other IT/office categories were positive with desk computing in the lead at +19%. The Apple launch in week 39 added to the boost of smartphones (+18%).
- While audio home systems slumped at -22%, PTV and headsets grew by 14%. Cooling was weak at +3%. Washing machines posted +8%. SDAs were double-digit positive with hot beverage makers in the lead at +18%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 39 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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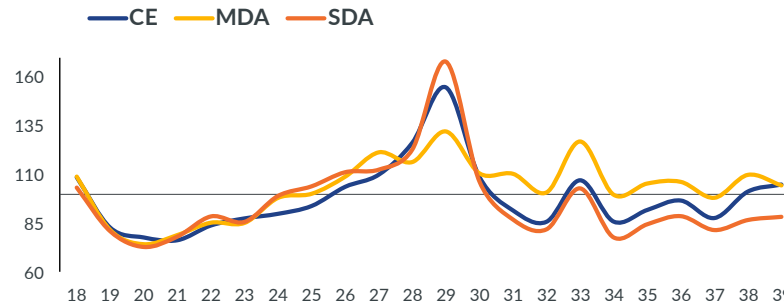
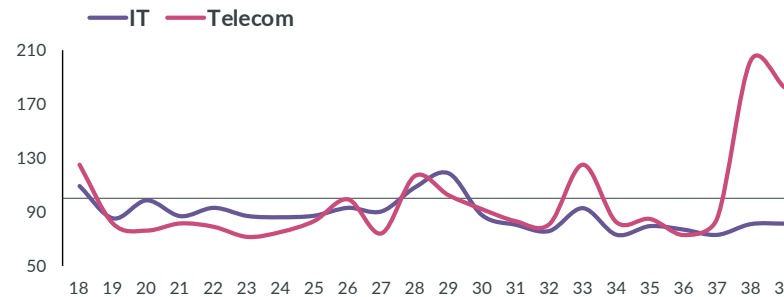
Spain

Japan

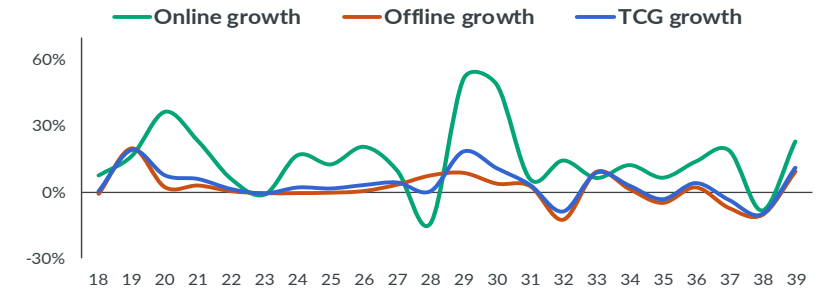
Brazil

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 39 (Sep 23 – Sep 29)

- Good growth of +23% for online sales and +9% for traditional retail lifted the total TCG market by +11%.
- Week 39 saw +22% for smartphones, supported by the Apple launch. While media tablets grew as well, at +12%, mobile computing lagged at -10%.
- CE/MDA/SDA posted positive growth rates throughout with headsets the leading category at +23%. PTV was up 7%. We saw double-digit scores for washing machines (+11%), shavers (+14%), hot beverage makers (+16%) and food preparation (+21%).

SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 39 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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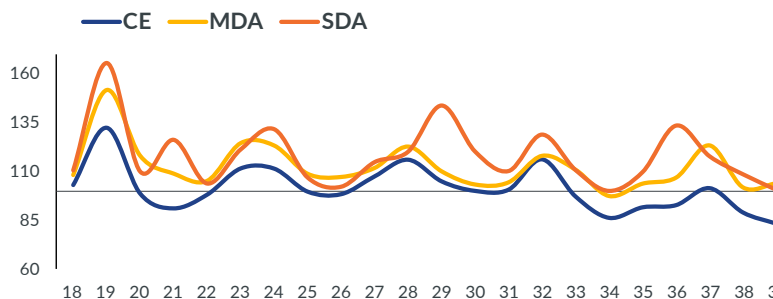
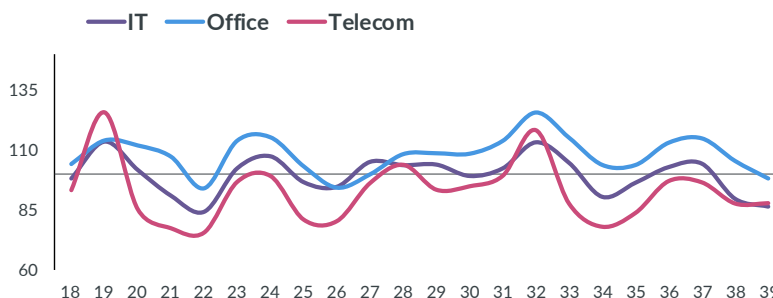
Spain

Japan

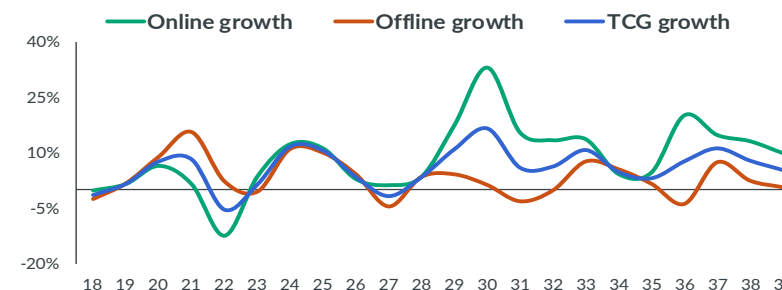
Brazil

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 39 (Sep 23 – Sep 29)

- Acceleration of online sales of +10% and a plus of 1% for traditional retail led to +5% for the total TCG market.
- Except for mobile computing at -2%, IT/office posted growth overall with laser printers in the lead at +23%. Desk computing at +16% claimed second place. Smartphones were up 3%.
- Vacuum cleaners presented a very good result of +38%. Most other CE/MDA/SDA categories were double-digit positive as well. Hot beverage makers were a little behind at +8% and PTV even lost 2%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 39 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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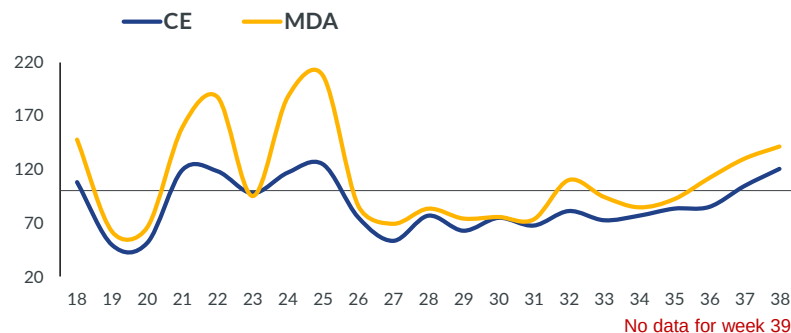
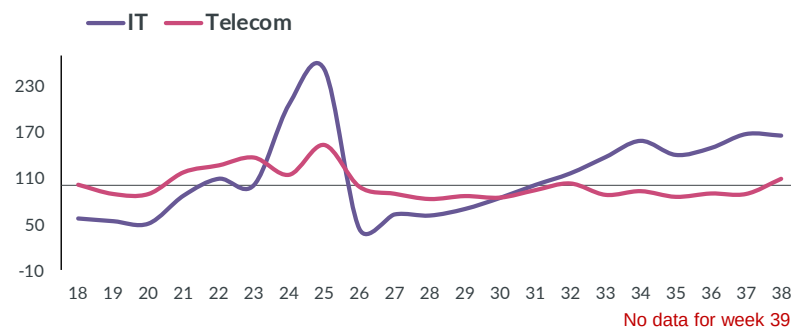
Spain

Japan

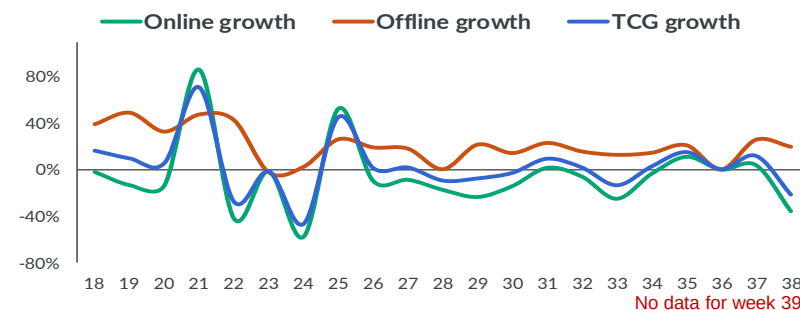
Brazil

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 39 (Sep 23 – Sep 29)

- No data for week 39



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 39 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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