

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 227
Week 42 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.

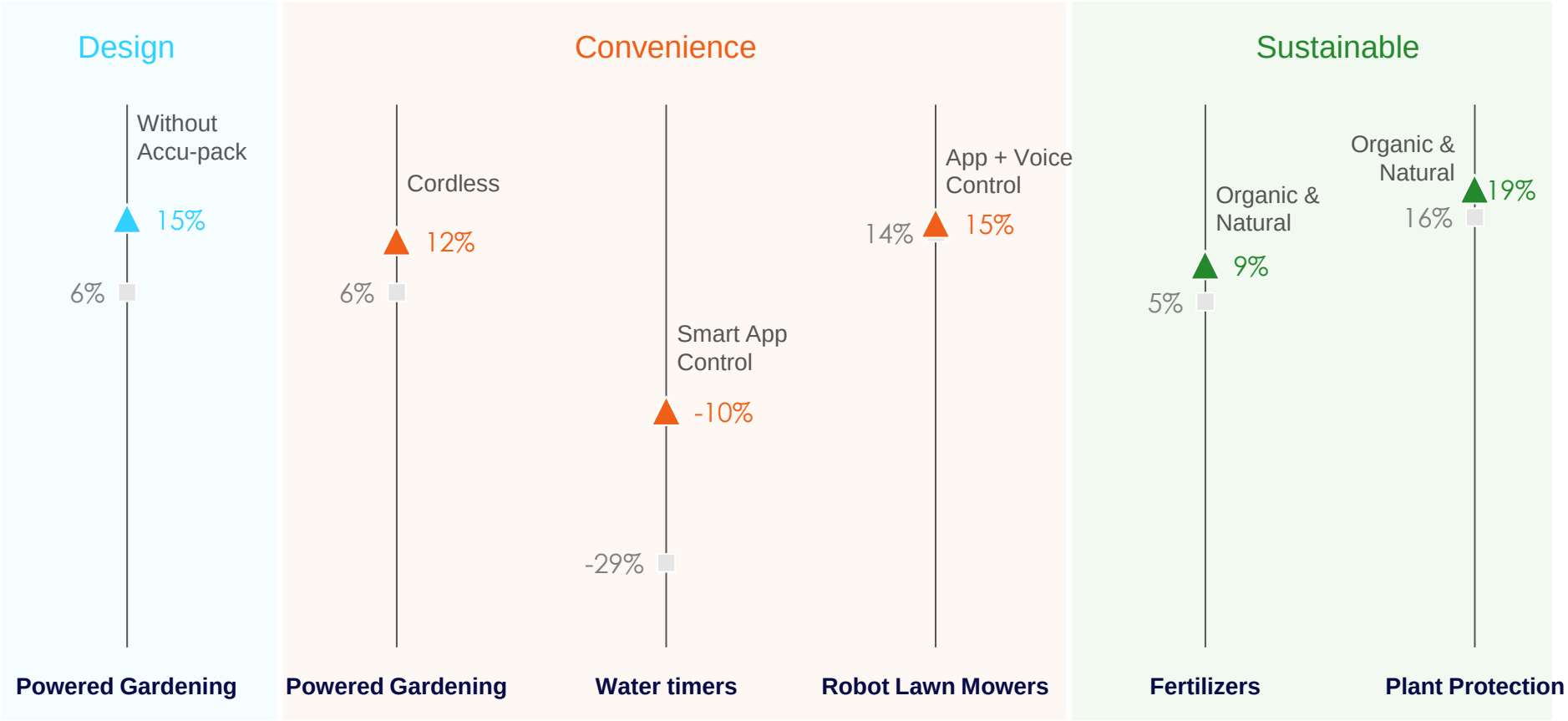
Fact of the Week

Features offering “value” to consumers continue to outperform category

via design, convenience and sustainability

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Spain
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Brazil
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Gardening | Sales Value EUR | Growth rate PY +/- % | YTD 2024: January – June



Source: GfK Market Intelligence: Sales Tracking | Channel : Panel Market incl. Wholesalers | Coverage: Belgium, France, Germany, Great Britain, Hungary, Italy, Netherlands, Poland, Spain, Switzerland | Refer to Appendix for PG coverage by country

Weekly retail insights from the Point of Sale

Spotlight on Germany

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Fact of the week

Germany

Great Britain

France

Italy

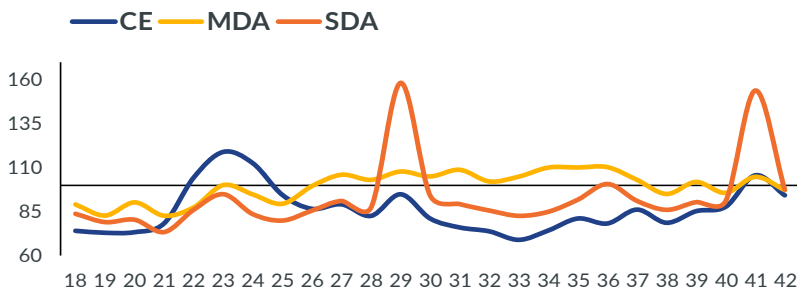
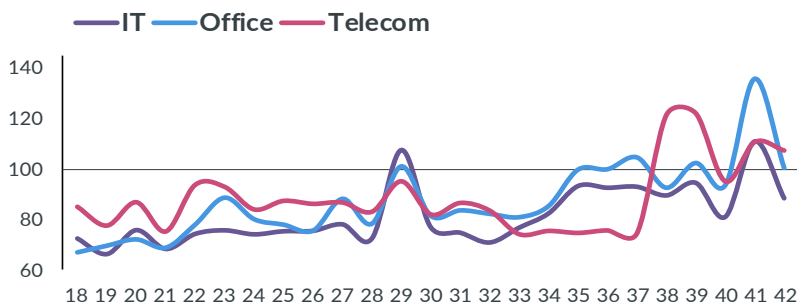
Spain

Japan

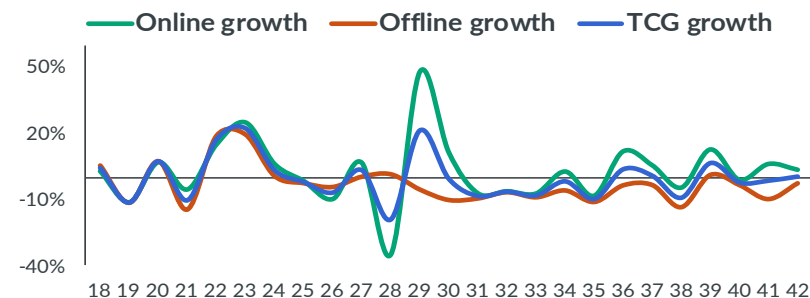
Brazil

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 42 (Oct 14– Oct 20)

- Traditional retail at -3% and online sales at +4% led to a flat total TCG market.
- Except for mobile computing at -13%, all other IT/office categories delivered growth, ranging from +1% for desk computing to +12% for laser printers. Smartphones posted an uptick of 2%.
- While audio home systems won 3%, PTVs decreased by 2%. The worst-performing category in week 42 was air treatment at -33%. Cooling at -10% and food preparation at -8% did not perform well either. Vacuum cleaners gained 18%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 42 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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Fact of the week

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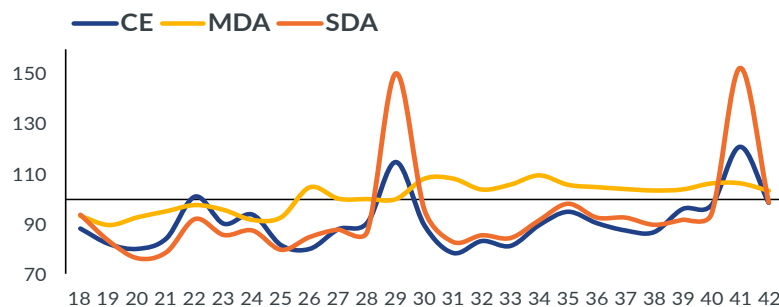
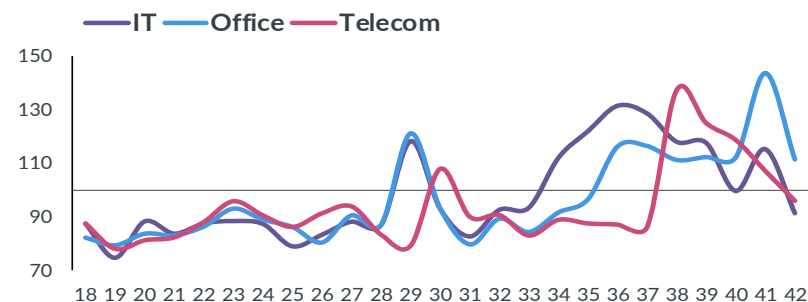
Spain

Japan

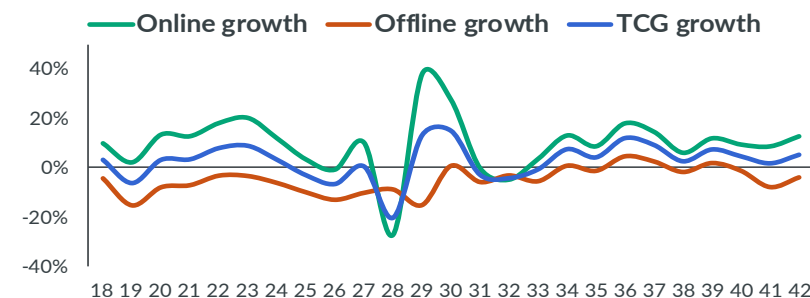
Brazil

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 42 (Oct 14– Oct 20)

- Online sales at +13% lifted the total TCG market by 5%. The overall result was clouded by traditional retail at -4%
- Except for media tablets at -6%, the other IT/office categories posted growth with monitors in the lead at +24% and keyboards claiming second place at +17%. Media tablets marked the other end of the scale at -6%. Smartphone experienced growth of 5%.
- Most MDA/SDA categories and headsets posted solid double-digit growth. Cooling and washing machines were behind at +2% and +7%. PTV lagged at -4%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 42 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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Fact of the week

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Italy

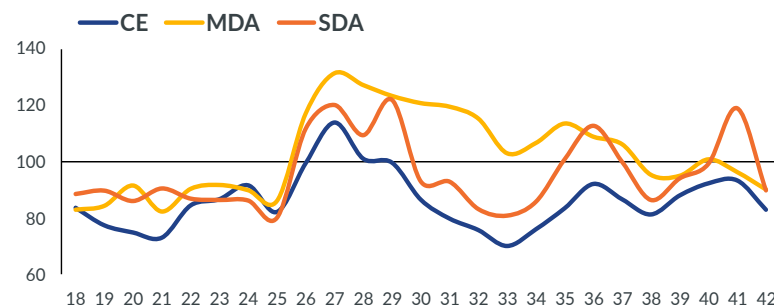
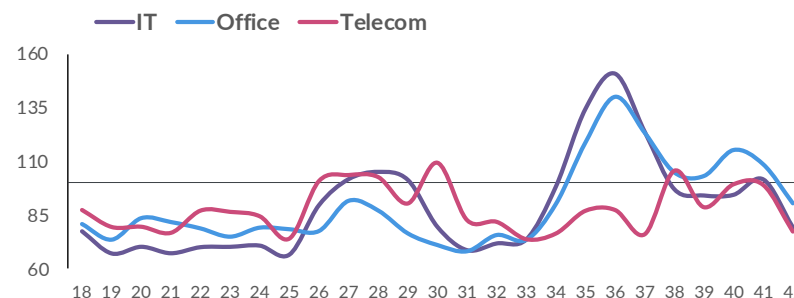
Spain

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 42 (Oct 14– Oct 20)

- Traditional retail delivered -1%. Combined with online sales at +7% this resulted in +2% for the total TCG market.
- IT/office products delivered positive results throughout with laser printers out in front at +33%. Mobile computing was the weakest category at +1%. Smartphones slumped at -10%.
- Except for hot beverage makers at -5% and cooling at -7%, most MDAs/SDAs posted sound double-digit positive scores with air treatment in the lead at +34%. Washing machines at +8% were a bit behind. CE categories were led by headsets at +16%. PTVs declined by 3%.



SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 42 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

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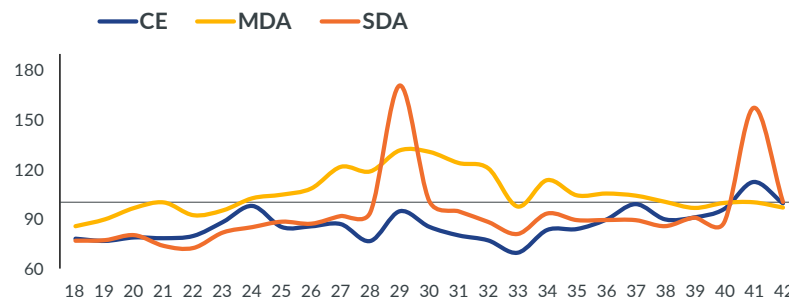
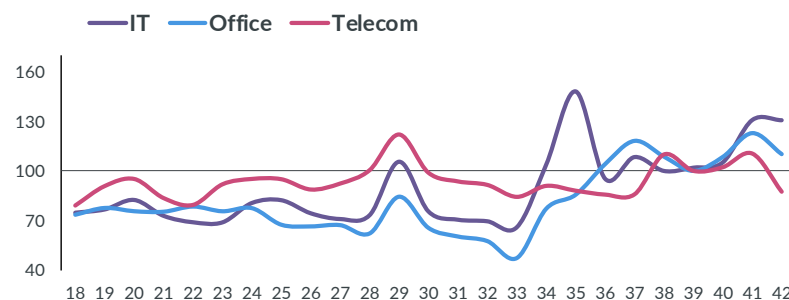
Spain

Japan

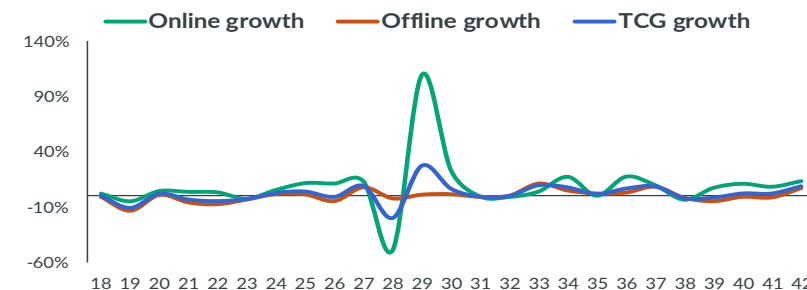
Brazil

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 42 (Oct 14– Oct 20)

- Online sales at +14% lifted the total TCG market by 9%. Traditional retail at +7% added to it.
- IT/office products delivered growth throughout with mobile computing (+31%) and media tablets (+42%) in the lead. Desk computing and printers were single-digit positive. Smartphones were down 3%.
- Except for cooling at -4%, MDAs/SDAs delivered double-digit growth with shavers out in front at +24% and vacuum cleaners second place at +21%. PTV experienced a plus of 10% while audio home systems dropped by 7%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 42 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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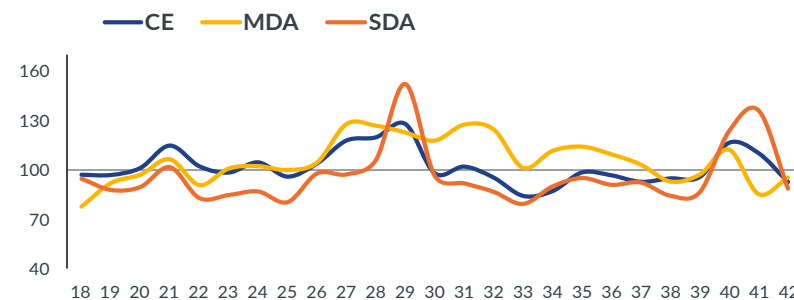
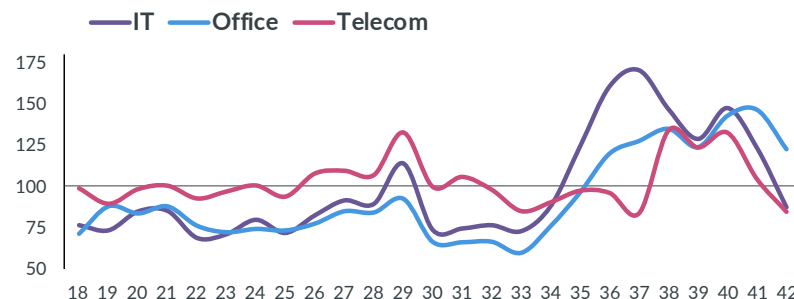
Spain

Japan

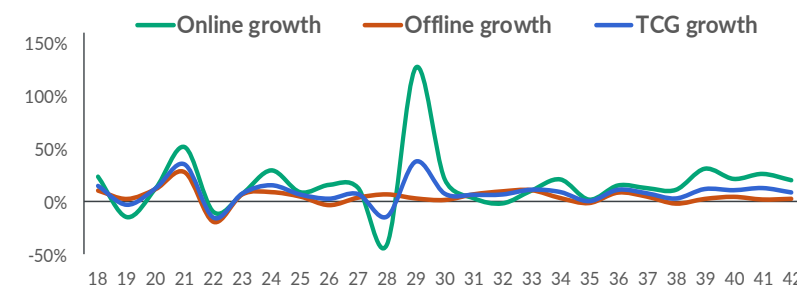
Brazil

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 42 (Oct 14– Oct 20)

- Good growth of online sales (+21%) lifted the total TCG market by 9%. Traditional retail added to it at +4%.
- Except for mobile computing at +4%, all other IT/office categories were double-digit positive with laser printers in the lead at +32% and media tablets posting +19%. Smartphones increased by 10%.
- While audio home systems lagged at -6%, soundbars grew by 33%. PTV accelerated at +6%. Cooling was weak at -2%. All other MDA/SDA categories accelerated in double digits apart from shavers at +5%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 42 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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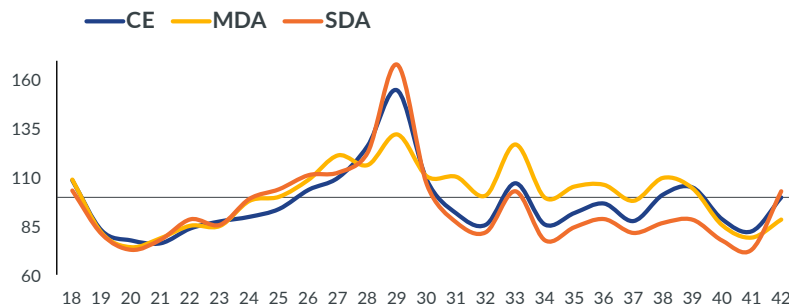
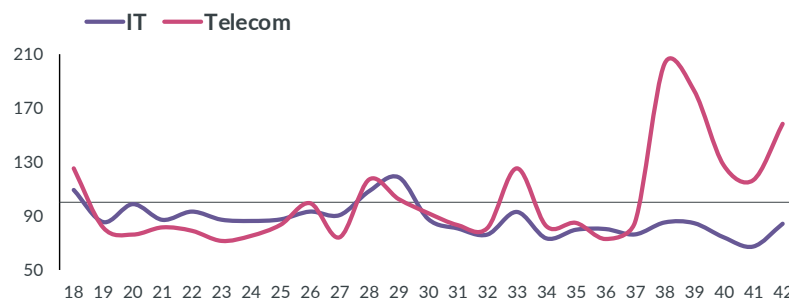
Spain

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 42 (Oct 14– Oct 20)

- Close trends of +18% for online sales and +16% for traditional retail accelerated the total TCG market by 16%.
- There was a boost for smartphones, delivering +52%. While mobile computing won 5%, media tablets dropped by 7%.
- Headsets were flat but soundbars and PTV gained 11% and 8% respectively. With the exception of air treatment (-13%), MDA/SDA categories posted positive results. Food preparation (+25%), washing machines (+14%), and cooling (+11%) were the leading categories.



SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 42 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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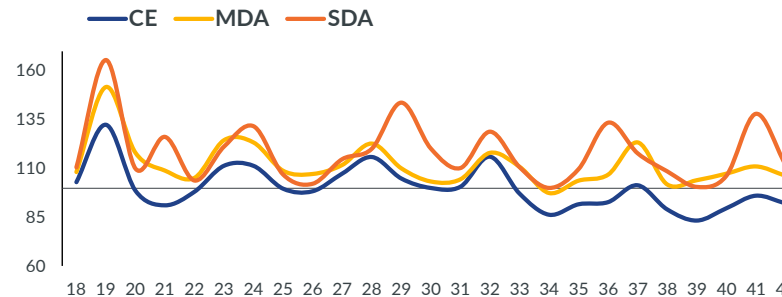
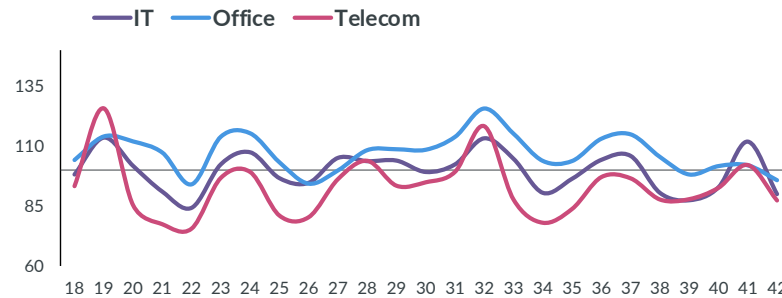
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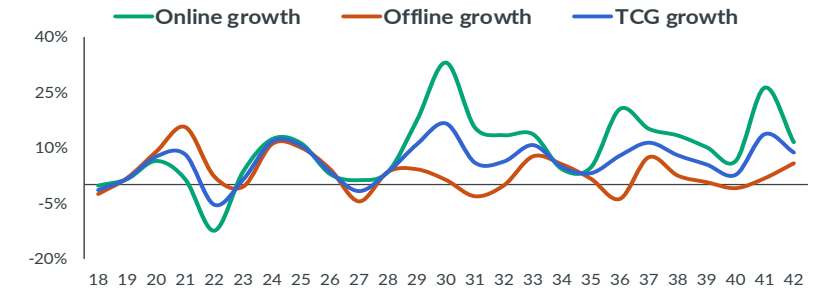
Brazil

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 42 (Oct 14– Oct 20)

- A plus of 11% for online sales and an increase of 6% for traditional retail brought +9% to the total TCG market.
- There was double-digit growth for IT/office categories with desk computing leading at +27%. Only mobile computing lagged at -3%. Smartphones were up 5%.
- Vacuum cleaners and hot beverage makers led at notable +39% and +37% respectively. MDAs accelerated at +21%. Food preparation was a bit behind at +5%. Audio home systems at +37% were also strong. PTVs were weak at +2%.



SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 42 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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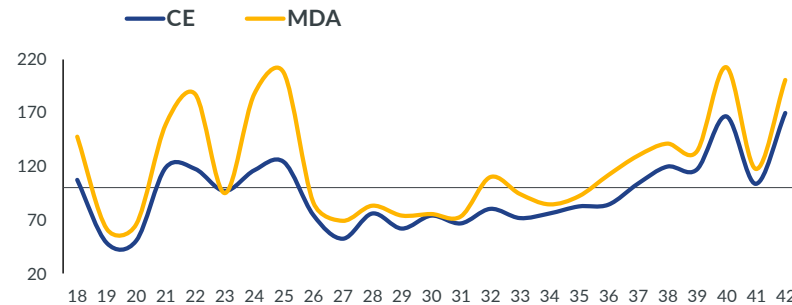
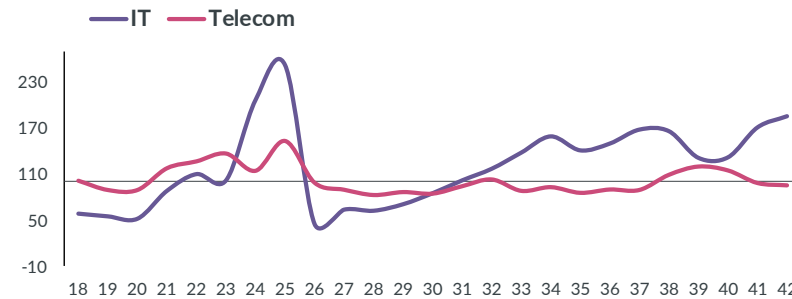
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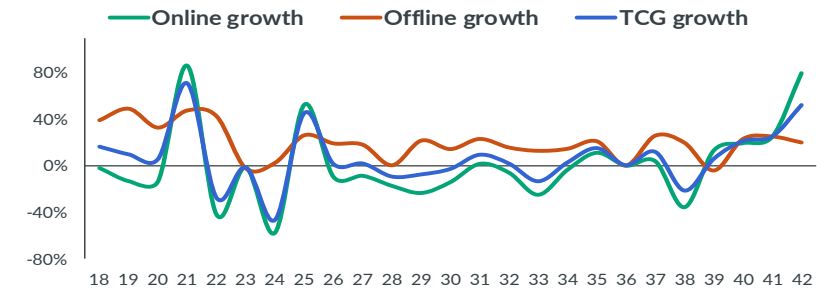
Brazil

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 42 (Oct 14– Oct 20)

- Exceptional growth of 80% for online sales brought the total TCG market to a plus of 52%. Traditional retail at +20% added to it.
- Smartphones were the weakest category with respect to growth rate, at +5%. However, they had quite an impact due to their high share in the product group basket.
- The other product groups saw triple-digit growth due to the trade-in program supported by central government for replacing existing items with energy efficient ones i.e. PTV, washing machines, cooling, computers, and some others.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 42 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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