

State of Tech & Durables

Weekly trends and insights for
the tech and durables market

Edition 228
Week 43 of 2024
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NielsenIQ



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Fact of the week

Germany

Great Britain

France

Italy

Spain

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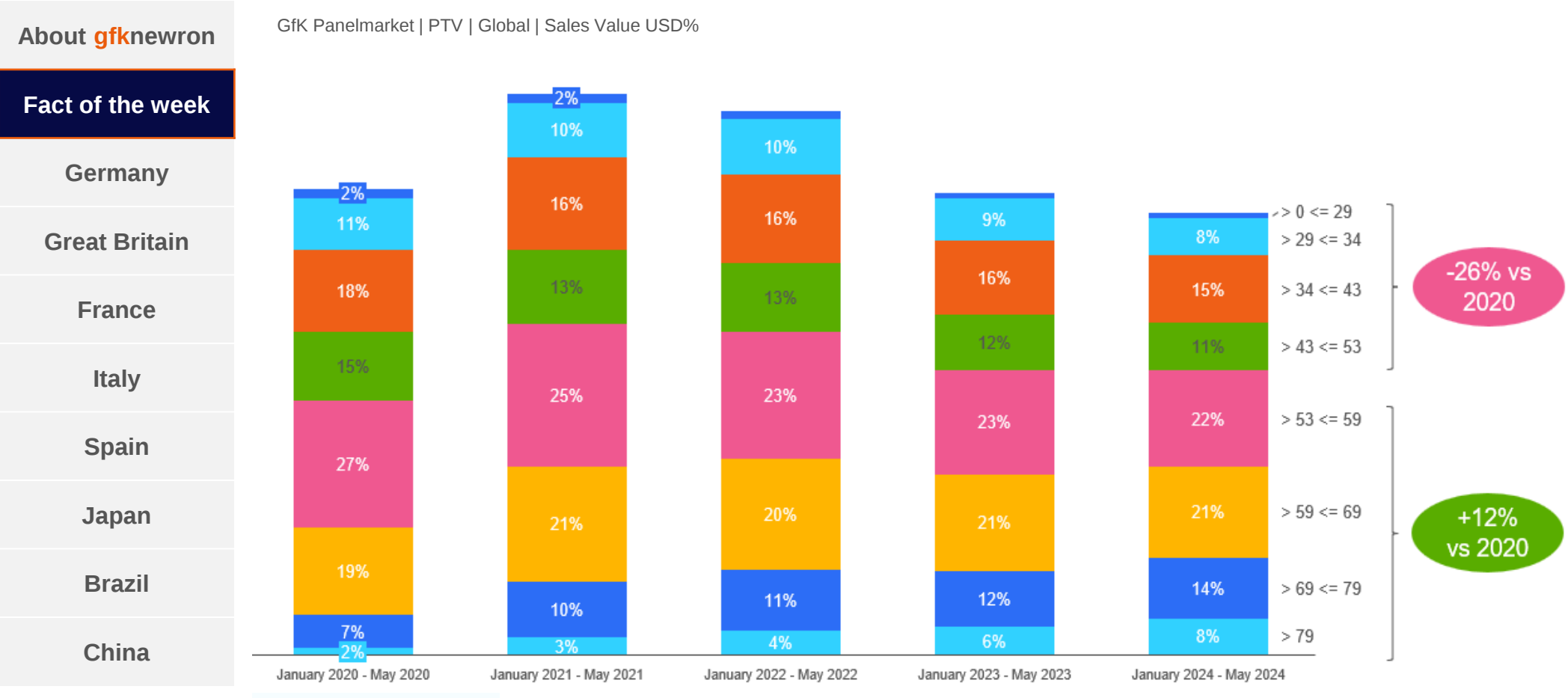
In an era where market fluctuations are the norm, having a finger on the pulse of weekly changes is crucial. **gfknewron** offers more than just data; it provides clarity and direction in a sea of information so you can act based on the most current facts.

Accessible across your entire organization, **gfknewron** is a single point of truth for business-critical data. It distills complex market, consumer, and brand intelligence into a clear view of your performance within the market ensuring your strategies are robust and resilient.

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Fact of the Week

With gaining importance of larger screens, watching TV will become a more “cinematic event”



Source: GfK Market Intelligence: Sales Tracking | Panel Market incl. Wholesalers | Global (ex. NA)

Weekly retail insights from the Point of Sale

Spotlight on Germany

About **gfknewron**

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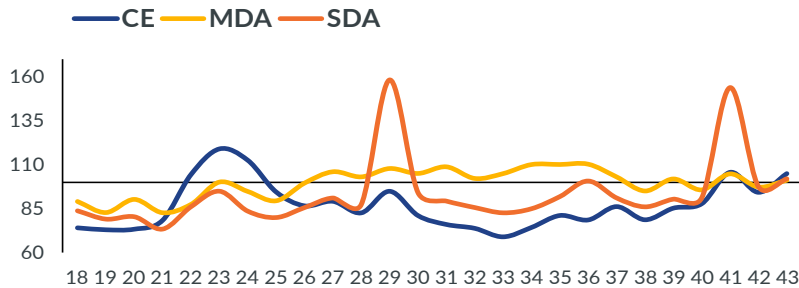
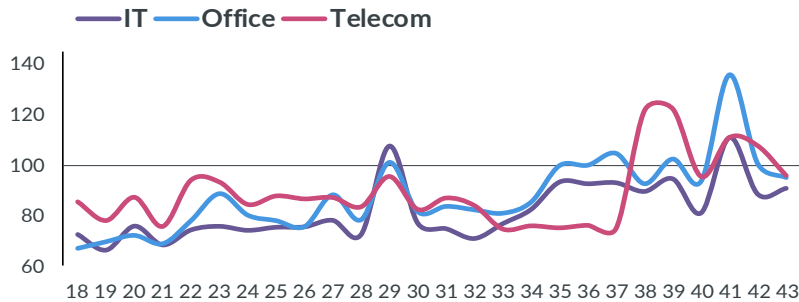
Spain

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 43 (Oct 21– Oct 27)

- Traditional retail at -11% dragged the total TCG market down by 7%. Online sales at -2% added to it.
- Except for monitors and laser printers at +2%, all other IT/office categories posted moderate downswings. Smartphones lagged at -8%.
- CE categories were double-digit negative with audio home systems in front at -26% and PTVs down by 15%. At -23%, air treatment also suffered. Cooling lagged at -11%. Shavers, dental care, and hot beverage makers saw upticks of 4%.



SOURCE: GfK Market Intelligence: Sales Tracking, Germany; Calendar week 1 2023 – 43 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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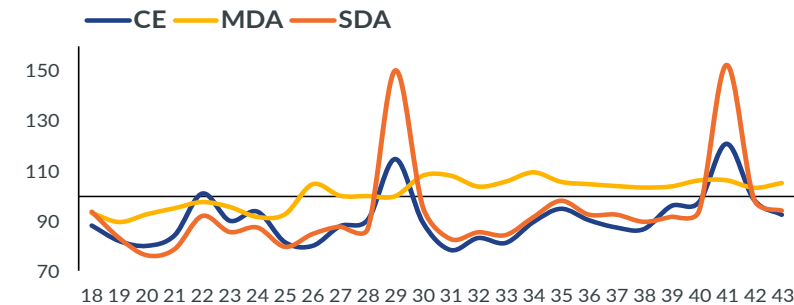
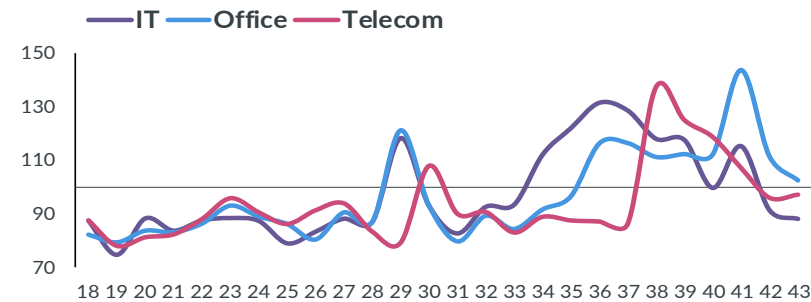
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Japan

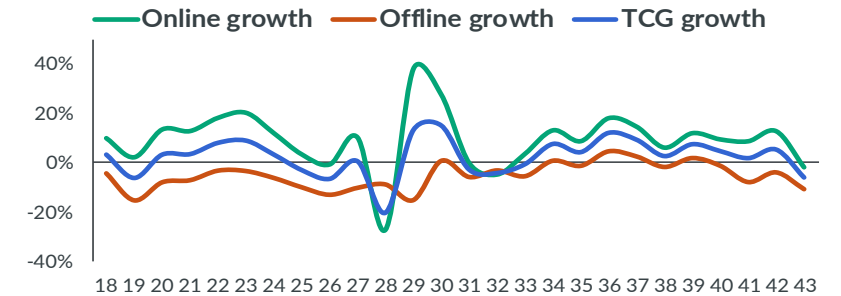
Brazil

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 43 (Oct 21– Oct 27)

- Traditional retail fell by 11% and online sales were down 2%, leading to an average of -6% for the total TCG market.
- There were double-digit increases for monitors, peripherals and laser printers. Media tablets at -9% marked the other end of the scale. Smartphones decelerated at -12%.
- While headsets grew by 8%, the other CE categories declined with PTVs posting -8%. Hot beverage makers were the star in week 43, delivering +31%. All other MDAs/SDAs grew as well, except for vacuum cleaners at -3%.



SOURCE: GfK Market Intelligence: Sales Tracking, Great Britain; Calendar week 1 2023 – 43 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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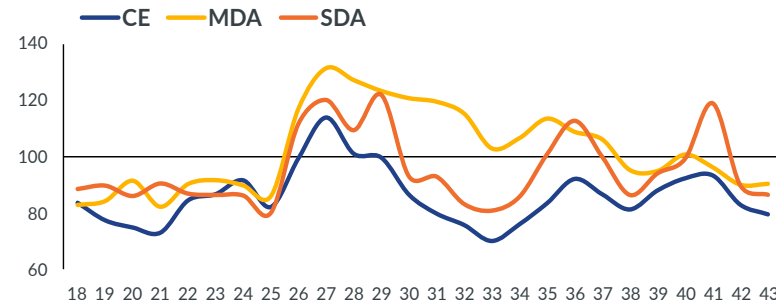
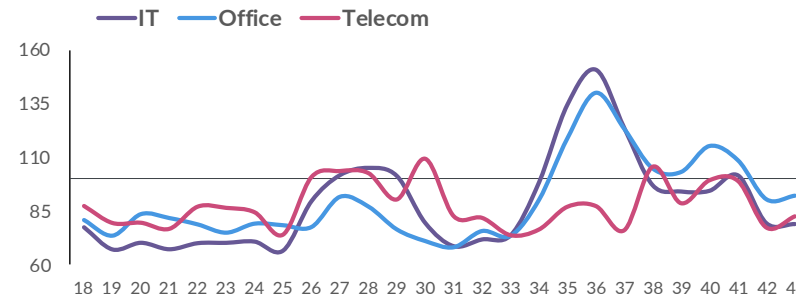
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 43 (Oct 21– Oct 27)

- Traditional retail delivered -3%. Combined with online sales at +6% the result was a flat total TCG market.
- IT/office products delivered a mixed picture with laser printers out in front at +138% and desk computing at the other end of the scale at -12%. Smartphones lagged at -4%.
- Except for hot beverage makers at -15%, MDAs/SDAs posted positive scores of between +28% for vacuum cleaners and +1% for cooling. CE categories were double-digit negative, with PTV hit the least at -11%. Only headsets were positive at +10%.



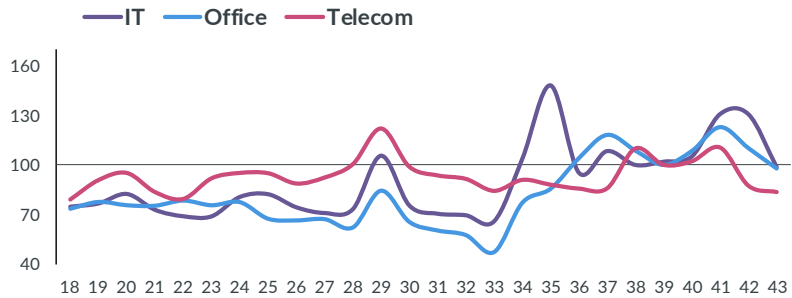
SOURCE: GfK Market Intelligence: Sales Tracking, France; Calendar week 1 2023 – 43 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile/Desktop computing (excl. Media sticks/boxes), media tablets, monitors, keying devices, pointing devices – Office: Laser and inkjet printers – 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

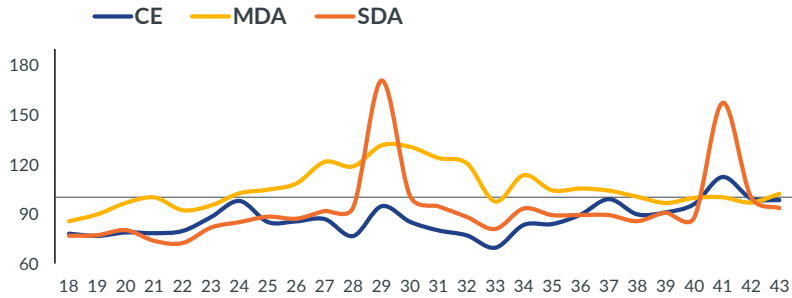
Spotlight on Italy

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



Key take aways in calendar week 43 (Oct 21– Oct 27)

- Online sales at +5% lifted the total TCG market by 2%. Traditional retail at +1% added to it.
- IT/office products delivered a mixed performance, ranging from +12% for media tablets to -13% for laser printers. Smartphones were down 6%.
- In MDA/SDA, only food preparation (-28%) and cooling (-7%) were negative. Air treatment stood out at +99%, dental care delivered +22%, and shavers +8%. PTV experienced a plus of 6% while audio home systems fell by 15%.



SOURCE: GfK Market Intelligence: Sales Tracking, Italy; Calendar week 1 2023 – 43 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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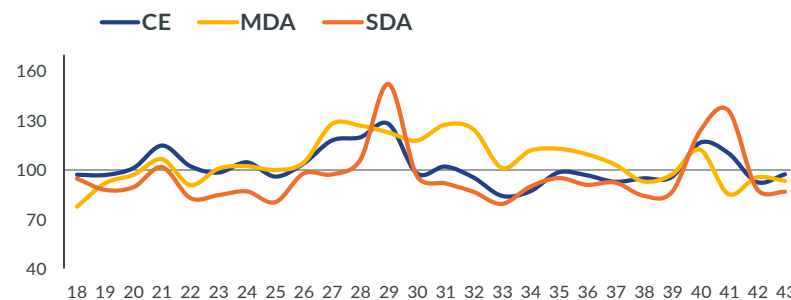
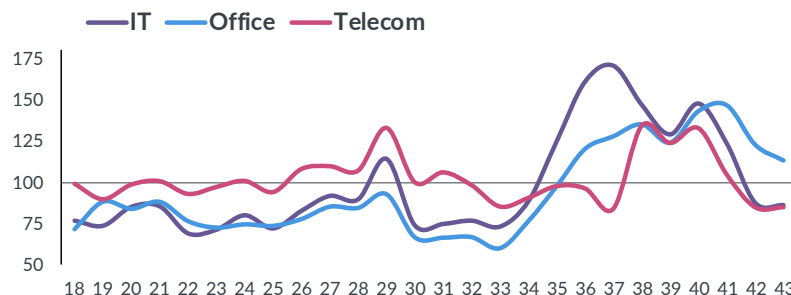
Spain

Japan

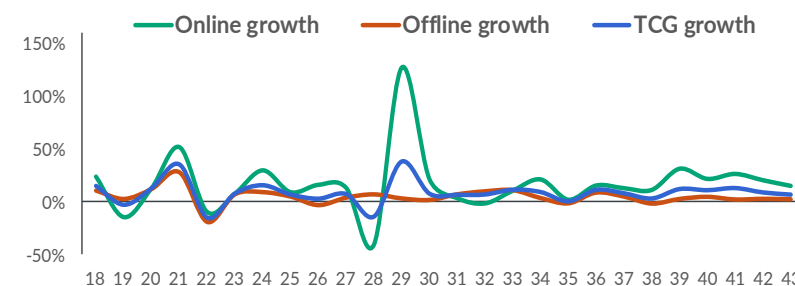
Brazil

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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 43 (Oct 21– Oct 27)

- Good growth of online sales (+16%) lifted the total TCG market by 7%. Traditional retail added to it at +3%.
- This development was driven by laser printers (+23%), media tablets (+17%), and inkjet printers (+15%). Smartphones added to it at +4%.
- Except for audio home systems at -5% and cooling at -3%, all other CE/MDA/SDA categories supported the good results of week 43. Soundbars accelerated at +20% and PTV grew by 16%. Headsets posted +13%, vacuum cleaners +12%, and hot beverage makers +10%. Shavers were weaker at +3%.



SOURCE: GfK Market Intelligence: Sales Tracking, Spain; Calendar week 1 2023 – 43 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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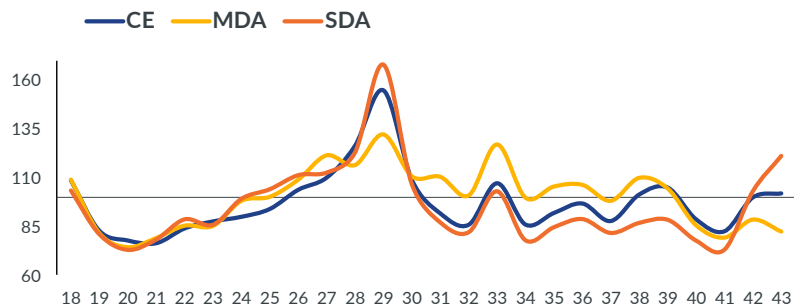
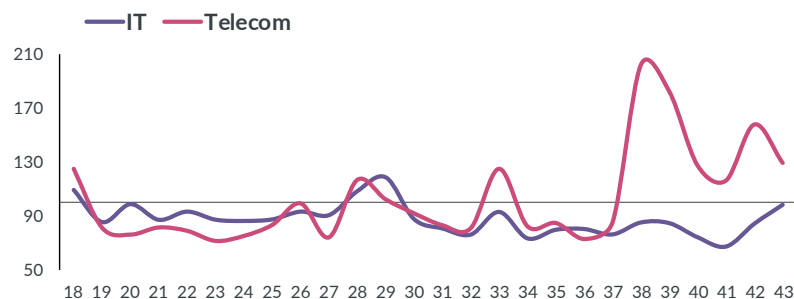
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Retail sales (value EUR) for technical consumer goods (TCG), YoY growth %



Key take aways in calendar week 43 (Oct 21– Oct 27)

- Exceptional growth of 78% for online sales delivered +21% for the total TCG market. Traditional retail closed week 43 at +9%.
- IT and telecom categories won in double digits with media tablets in the lead at +39%.
- Dental care posted an outstanding +112% and all other CE/MDA/SDA categories added to it at double-digit scores. For example, hot beverage makers posted +52%, shavers +47%, and vacuum cleaners +40%. MDAs were a little weaker at +13% for cooling and washing machines.



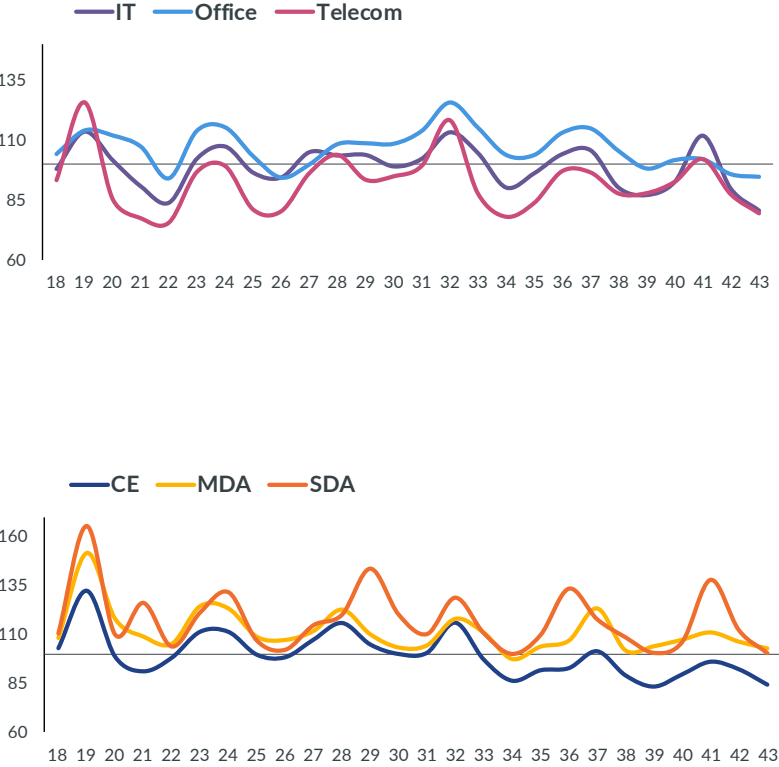
SOURCE: GfK Market Intelligence: Sales Tracking, Japan; Calendar week 1 2023 – 43 2024; Technical consumer goods include: Telecom: Smartphones, headsets – IT: Mobile computing, media tablets – Consumer Electronics (CE): TVs, audio home systems, soundbars – Major domestic appliances (MDA): Cooling and 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

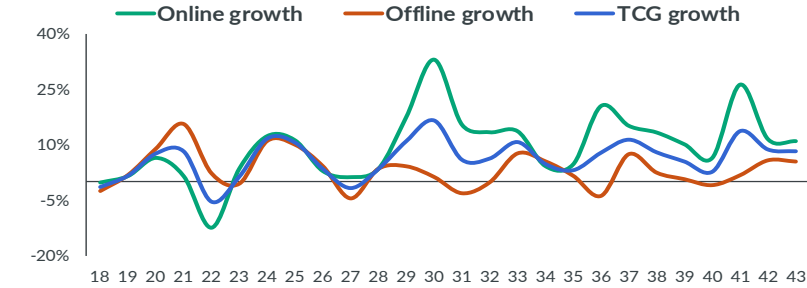
Spotlight on Brazil

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



Key take aways in calendar week 43 (Oct 21– Oct 27)

- A plus of 11% for online sales and an increase of 5% for traditional retail brought +8% to the total TCG market.
- While media tablets and mobile computing were weak at +1%, desk computing and laser printers posted +31%. Smartphones experienced an uptick of 2%.
- Vacuum cleaners led at a notable +44%. MDAs accelerated at +25% for cooling and +22% for washing machines. Food preparation was a bit behind, at +9%. Audio home systems at +24% were strong too, while PTVs were weak at +1%.



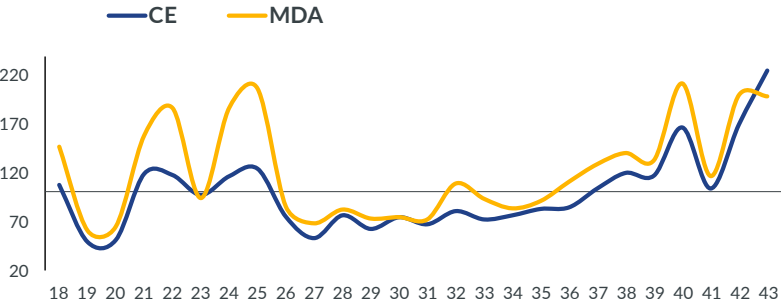
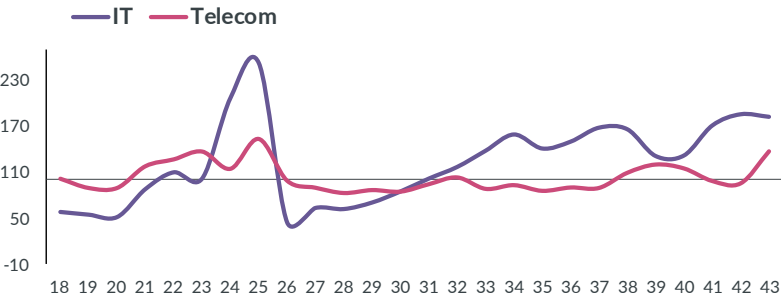
SOURCE: GfK Market Intelligence: Sales Tracking, Brazil; Calendar week 1 2023 – 43 2024; Technical consumer goods include: Telecom: Smartphones – IT: Mobile/Desk computing (excl. Media sticks/boxes), media tablets – Office: Laser and inkjet printers – Consumer Electronics (CE): TVs, audio home systems – 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

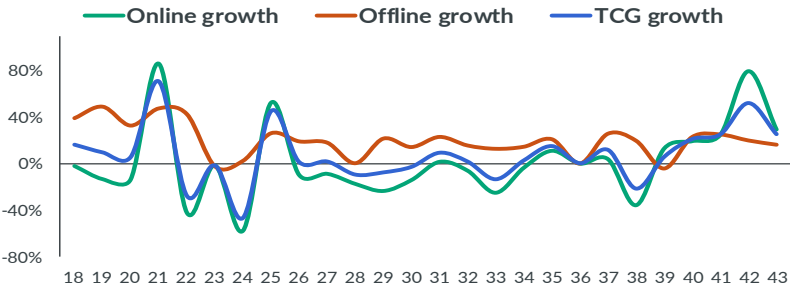
Spotlight on China

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



Key take aways in calendar week 43 (Oct 21– Oct 27)

- Remarkable growth of 30% for online sales took the total TCG market to a plus of 25%. Traditional retail at +16% added to it.
- Smartphones were the weakest category for growth rate, at +13%, but they had quite an impact due to their high share in the product group basket.
- The other product groups saw high double-digit growth due to the trade-in program supported by central government for replacing existing items with energy-efficient models – as seen in PTV, washing machines, cooling, computers, and others.



SOURCE: GfK Market Intelligence: Sales Tracking, China; Calendar week 1 2023 – 43 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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